



Word

Advanced

Instructor Guide

[Your Company Name]

Custom **Guide**

EVALUATION ONLY

© 2025 by CustomGuide, Inc. 3387 Brownlow Avenue, Suite 200; Saint Louis Park, MN 55426

This material is copyrighted and all rights are reserved by CustomGuide, Inc. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the prior written permission of CustomGuide, Inc.

We make a sincere effort to ensure the accuracy of the material described herein; however, CustomGuide makes no warranty, expressed or implied, with respect to the quality, correctness, reliability, accuracy, or freedom from error of this document or the products it describes. Data used in examples and sample data files are intended to be fictional. Any resemblance to real persons or companies is entirely coincidental.

The names of software products referred to in this manual are claimed as trademarks of their respective companies. CustomGuide is a registered trademark of CustomGuide, Inc

Contents

Collaborate with Word.....	5
Co-Author Documents	6
Simultaneously Edit.....	6
Highlight and Comment	7
Highlight Text	7
Insert a Comment	8
Delete a Comment	9
Reply to a Comment	9
Show/Hide Comments	10
Track and Review Revisions	11
Use Track Changes	11
View Markup	12
Lock Tracking.....	13
Review Revisions.....	14
Compare Documents	15
Open the Compare View.....	15
Accept or Reject Differences.....	17
Line Numbers	18
Add Line Numbers.....	18
Customize Line Numbers	19
Protect Documents	20
Mark as Final	20
Password Protect a Document	22
Remove a Password	23
Inspect a Document	24
Inspect a Document	24
Forms	26
Show the Developer Tab	26
Create a Form.....	28
Finalize a Form	30
Advanced Documents	31
Customize Word.....	32
Customize Word Options.....	32

Customize the Ribbon	34
Customize the Quick Access Toolbar	35
Change the Default Font	36
Create and Use Building Blocks	37
Create a Building Block	37
Insert a Building Block	38
Move a Building Block to Another Template	39
Create and Use Simple Macros	41
Enable Macros	41
Record a Macro	43
Run a Macro	44
Copy Styles and Macros Between Templates	45
Copy Macros Between Templates	45
Copy Styles Between Templates	46
Advanced Find and Replace	48
Search with Wildcards	48
Search for Special Characters	50
Internationalization and Accessibility	51
Change the Proofing Language	51
Customize Language Preferences	52
Best Practices for International Documents	53
Fields	54
Insert a Date and Time Field	54
View and Edit Field Codes	55
Add Other Types of Field	56
Mailing Documents	57
Mail Merge	58
Set up and Choose Document Type	59
Select a Document	59
Select Recipients	60
Write Your Letter	61
Preview Your Mail Merge	62
Complete the Merge	63
Print Labels	64
Create a Label	64
Print Envelopes	66
Create an Envelope	66

Collaborate with Word

If you're working with a team on a document, you can use Word's document collaboration tools to make sure that everyone's on the same page. You can leave comments, review the revisions others make, or even work on the same document at the same time while seeing everyone's changes as they happen.

In this module, you'll learn how to highlight and comment on documents, how to track and review the revisions that others make, how to compare different versions of a document, and how to add line numbers to a document. You'll also learn how to password protect a document, inspect it for issues, and create and modify forms.

Objectives

- Co-Author Documents
- Highlight and Comment
- Track and Review Revisions
- Compare Documents
- Line Numbers
- Protect Documents
- Inspect a Document
- Forms

Co-Author Documents

If you're working on a document with a few other people, you can use the co-authoring tools to collaborate and make edits on a document simultaneously, seeing everyone's changes in real-time.

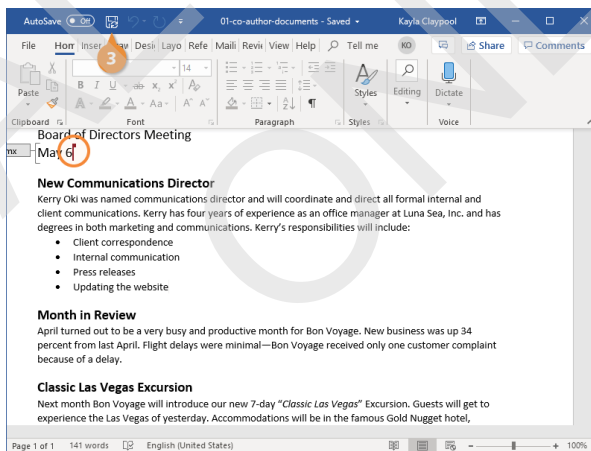
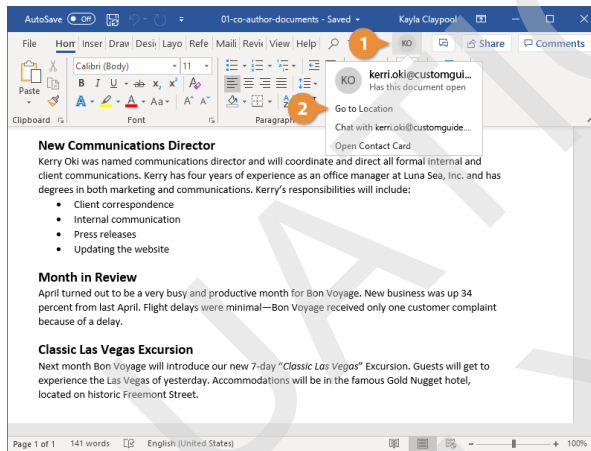
Simultaneously Edit

Make sure that the document is shared to either your OneDrive or a SharePoint site. Word's co-authoring features won't be available unless the document is saved to an online location that everyone can access.

- 1 Click a user's picture or initials to open an actions menu.
A menu opens, where you can jump to their edit point or start a chat.
- 2 Select **Go to Location** to move to where they're editing.
 - Other users will be represented by their text cursors.
 - The active paragraph will be locked, preventing anyone else from editing it, until you're finished or move on.

Changes are automatically synced. However, saving manually will sync changes to anyone working with the document who isn't automatically sharing changes.

- 3 Click the **Save** button to force a sync and display new changes.



Commented [IG1]:

Practice File: 01-co-author-documents.docx

Commented [IG2]:

1. You'll need to set up this lesson by saving the practice file to either OneDrive or SharePoint, then share it with your students from Word. (To share it, click the Share button at the end of the ribbon and enter the students' email addresses in the Invite People text field. Make sure they have editing privileges set, then click the Share button).

2. Once saved in the cloud, have the students open the shared document.

3. Click a user's picture or initials in the ribbon.

Show the list of whom the document has been shared with. Once a student has opened the file, the status below their name should change to reflect that they are editing.

If anyone's status doesn't reflect real-time editing, make sure that they have the Automatically Share Changes option set to Always.

4. Select Go to Location to move to where they're editing.

5. Make some changes to the document; for example, select the date on the second line and apply a bold effect, or add the current year after the date.

As you edit, the students should see that line is locked from editing until you finish making your changes.

6. Click Save.

Highlight and Comment

Commented [IG3]:

Practice File: 02-highlight-and-comment.docx

If you want to draw someone's attention to a certain part of a document, you can highlight portions of the text. You can also add a comment to some text if you have something to say about it.

Highlight Text

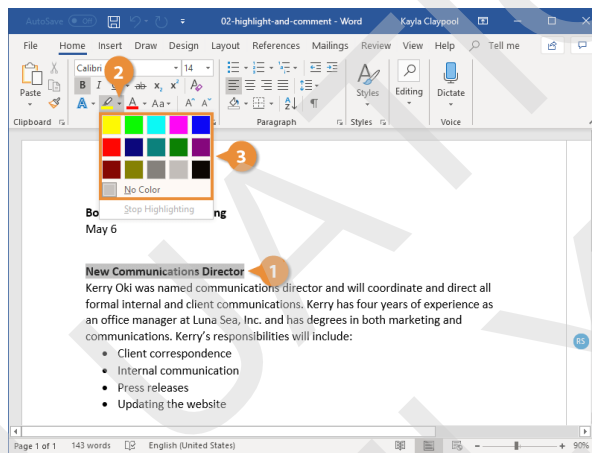
Highlighting text adds a brightly-colored background to some selected text.

- 1 Select the text you want to highlight.
- 2 On the Home tab, click the **Text Highlight Color** button list arrow.
A few bright colors will be shown.
- 3 Select a color.

The text is highlighted with a bold, bright background.

To remove text highlighting, select the text, click the **Text Highlight Color** button list arrow, and select **No Color**.

Shortcut: You can also just click the **Text Highlight** button to load the highlighter, then click and drag your cursor over the text you want to highlight. Then click the **Text Highlight** button again to turn it off when you're done.



Commented [IG4]:

1. Select the text "New Communications Director"
2. Click the Text Highlight Color list arrow.
3. Select bright green.

Explain to your students that the color you choose remains the highlight color until you change it.

Also note that if you click the highlight button without any text selected, the cursor changes to a highlighting cursor. You can click and drag over text to highlight it. Click the highlight button again to turn that off.

Make sure students know that to remove highlighting, they just select the highlighted text and select No Color from the Text Highlight Color list.

Insert a Comment

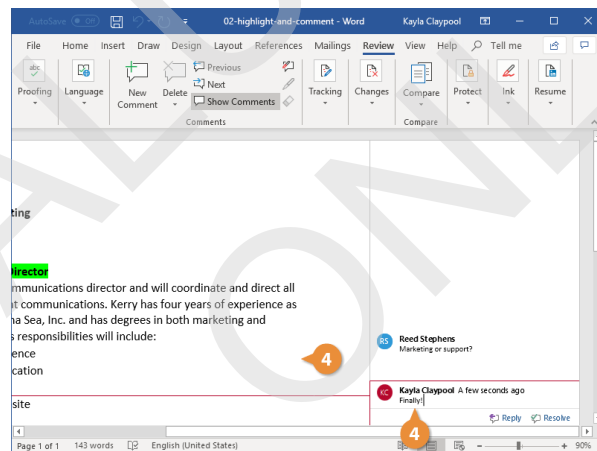
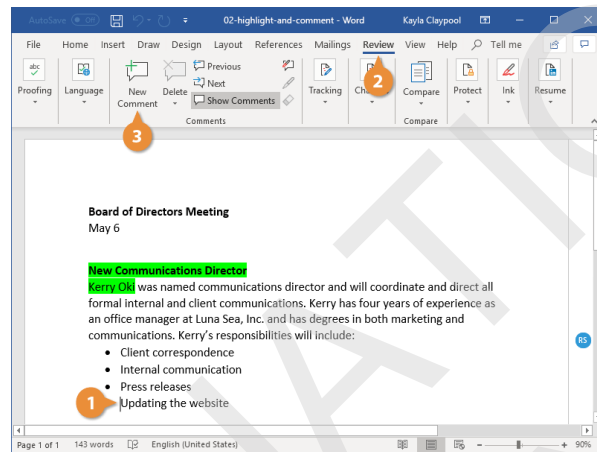
Adding a comment to a document is like writing a note in the page's margin. You can use Word's comments feature to add suggestions, notes, or reminders to your documents. Comments appear in boxes at the side of the page.

- 1 Select the text you want to add a comment to.
- 2 Click the **Review** tab.
- 3 Click the **New Comment** button in the Comments group.
- 4 Type your comment, then click outside the comment box when you're finished.

Shortcut: Right-click in the document and select **New Comment**.

Now anyone else viewing the document will see what you had to say about it.

Tip: To edit a comment, simply click in the comment balloon and edit the text as needed.



Commented [IG5]:

1. Select the "New business was up 34 percent from last April" sentence under Month in Review.
2. Click the Review tab.
3. Click New Comment in the Comments group.

Let your students know that they can also right-click in the document and select New Comment.

4. Type "Wow! That's amazing!" then click outside the comment when you're finished.

Also demonstrate how students can click inside a comment balloon to edit it.

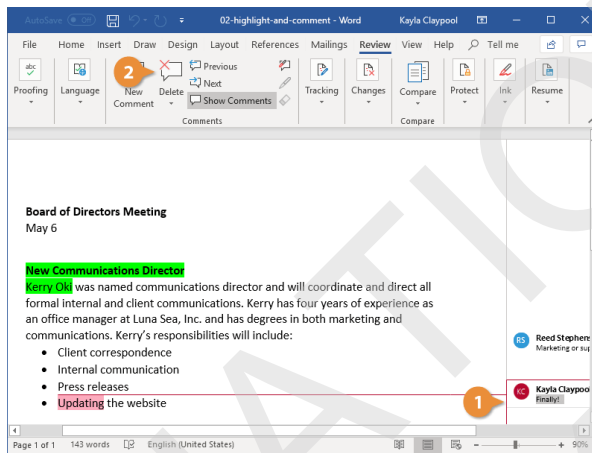
Delete a Comment

You can delete a comment after you've added it.

- 1 Select the comment by clicking anywhere in it.
- 2 Click the **Delete** button in the Comments group on the Review tab.

The comment is deleted.

Tip: To delete all comments, click the **Delete** button list arrow and select **Delete All Comments in Document**.



Commented [IG6]:

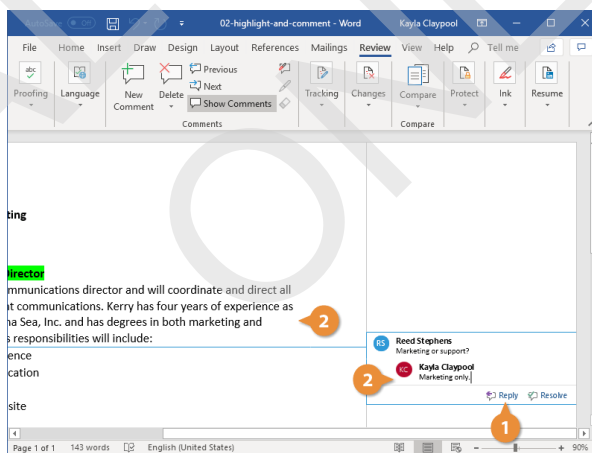
1. Select the comment you added by clicking anywhere in it.
2. Click the Delete button in the Comments group on the Review tab.

Reply to a Comment

In addition to making your own new comments, you can have a conversation by replying to comments made by other people.

- 1 Click the **Reply** button in the selected comment.
- 2 Type your response, then click outside of the comment box.

A reply is added below the comment.



Commented [IG7]:

1. Select the comment from CustomGuide and click the Reply button.
2. Type "By June" as a response.

Show/Hide Comments

If comments are distracting, you can easily hide them. This does not remove them, it only hides them from view.

1 Expand the **Tracking** group on the Review tab, if necessary.

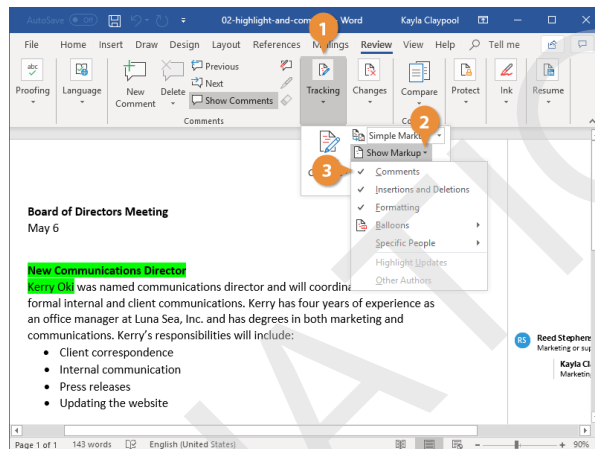
2 Click the **Show Markup** button list arrow.

Notice that **Comments** is checked here, indicating that comments are shown.

3 Select **Comments** to uncheck it.

Now, the comments are hidden and won't appear. To show comments again, just check **Comments** again in the same menu.

Tip: The **Show Comments** button in the Comments group on the Review tab can be clicked to toggle whether the comments are shown or collapsed into icons. This option is only available when Simple Markup is the selected display.



Commented [IG8]:

1. Expand the Tracking group, if necessary.
2. Click the Show Markup list arrow.
3. Click the check mark next to Comments to turn them off.

Repeat the process to show the comments once again.

Once comments are shown again, demonstrate that you can click the Show Comments button to toggle whether comments appear expanded, or whether they're collapsed into comment icons. Keep in mind, the Show Comments button is only enabled when Simple Markup in the Tracking group is the selected display.

Track and Review Revisions

Commented [IG9]:
Practice File: 03-track-and-review-revisions.docx

Revising a document with tracked changes in Word works just like revising a printed copy with a red pen. You can easily see the original text, and any additions, deletions, or changes made to the document are clearly marked.

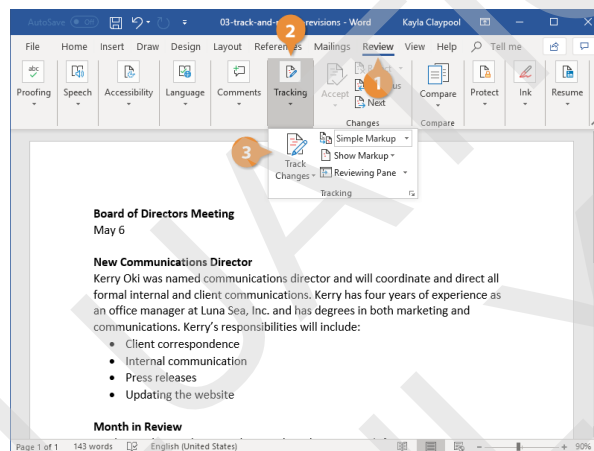
Use Track Changes

In order for changes to be marked up, you need to first track the changes.

- 1 Click the **Review** tab on the ribbon.
- 2 Expand the **Tracking** group, if necessary.
- 3 Click the **Track Changes** button.

Now, any changes made to the document will be tracked and marked up.

Shortcut: Right-click the status bar and select **Track Changes** to toggle it on or off.



Commented [IG10]:

1. Click the Review tab.
2. Expand the Tracking group, if necessary.
3. Click the Track Changes button.

Now, make some changes to the document by applying the Heading 1 style to the Classic Las Vegas Excursion heading, and applying italics to the text "Classic Las Vegas" in the following paragraph.

Point out that everything you do is now marked up in the text, with a note appearing in the margin.

View Markup

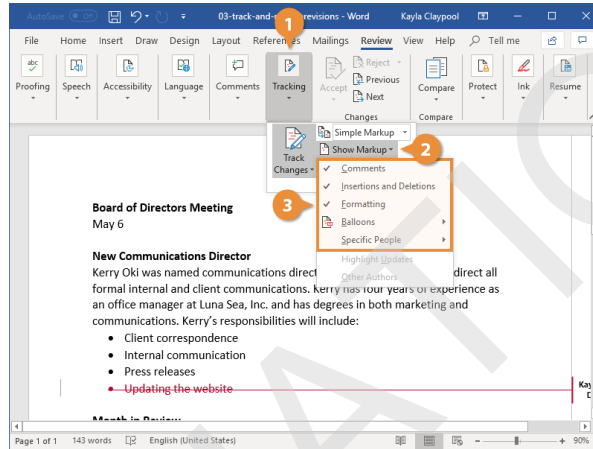
Once changes are tracked, you can choose which changes appear marked up.

- 1 Expand the **Tracking** group, if necessary.
- 2 Click the **Show Markup** button.
You can toggle whether or not tracking shows Comments, Ink, Insertions and Deletions, and Formatting changes. You can also toggle what appears in the balloons in the right margins, and hide revisions from certain people.
- 3 Select a type of markup to hide or show.

The selected type of markup is toggled on or off.

Tip: You can also use the **Display for Review** menu, directly above the Show Markup button, to control how detailed the markup that appears is.

- **Simple Markup:** Comments will appear, and text changes will be marked with a line in the margin.
- **All Markup:** Every change will be described in the margin, including what the change was and who made it.
- **No Markup:** No changes will be marked up.
- **Original:** The original document will be shown, without any of the changes that have been made.



Commented [IG11]:

1. Expand the Tracking group on the Review tab, if necessary.
2. Click the Show Markup button.

Describe the different types of markup that can be toggled here.

- Comments will toggle the display of comments made by you or other users.
- Ink toggles drawings made in a document using the Ink tools on a touch-enabled device.
- Insertions and Deletions toggles any markup for inserted or deleted text.
- Formatting toggles the markup for formatting changes, such as font, size, or paragraph spacing.

3. Select Comments.

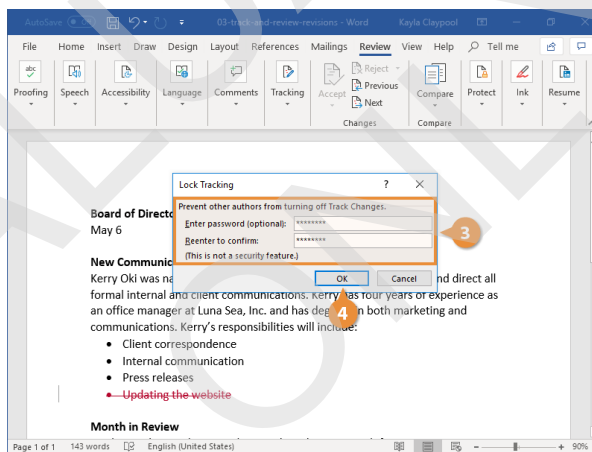
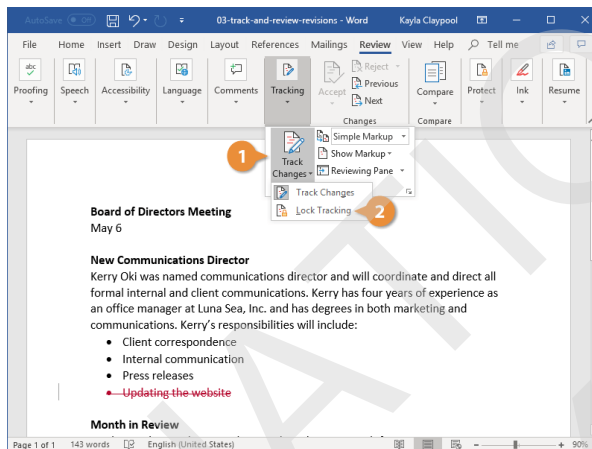
Lock Tracking

To make sure that everyone's changes get tracked, you can lock tracking so that it can't be disabled without a password.

- 1 Click the **Track Changes** button's list arrow.
- 2 Select **Lock Tracking**.
A dialog box opens, where you can enter a password that will be required to turn Track Changes off.
- 3 Enter and confirm a password.
- 4 Click **OK**.

Track Changes is locked and can only be disabled with the password. Also, you cannot accept or reject changes while Track Changes is locked.

To unlock Track Changes, click the **Track Changes** button list arrow again, select **Lock Tracking**, enter the password, then click **OK**.



Commented [IG12]:

1. Expand the Tracking group on the Review tab, if necessary.
2. Click the Track Changes button's arrow.
3. Select Lock Tracking.
4. Enter a password in the first field, then enter it again in the second field.
5. Click OK.

Show that the Track Changes button, as well as the Accept and Reject buttons in the Changes group, are now disabled.

Unlock Track Changes by clicking the Track Changes button arrow again, selecting Lock Changes, entering the password you had set, and then clicking OK.

Review Revisions

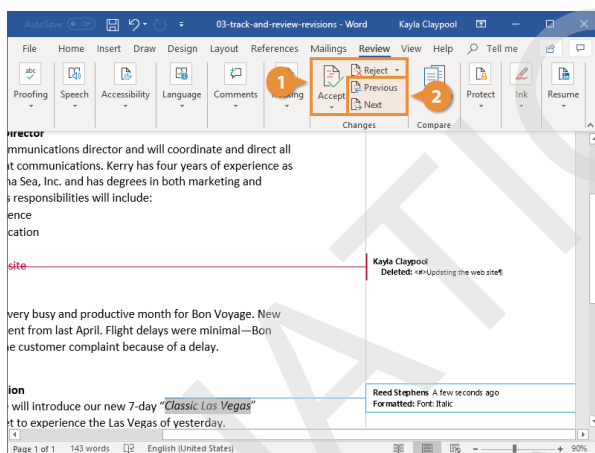
Revising documents using Word's revision features can save a lot of time, because the changes are already entered in your document. If you accept the changes, Word automatically incorporates the changes into your document. If you reject the changes, Word uses your original text.

- 1 Select a change, or use the **Next Change** and **Previous Change** buttons to move through changes.
- 2 Click **Accept** or **Reject** to accept or reject changes.

Changes that are accepted are incorporated into the document, removing the markup and moving on to the next change. Changes that are rejected are removed and replaced with the original text.

Shortcut: Right-click a revision and select **Accept** or **Reject**.

Tip: Review all tracked changes at once with the Reviewing Pane. Turn it on by clicking the **Reviewing Pane** button in the Tracking group.



Commented [IG13]:

1. Use the Next Change and Previous Change buttons to move through the marked-up changes in the document until the Formatted: Heading 1 change, applied to the Classic Las Vegas Excursion heading towards the end of the document, is selected.

2. Click the Accept button in the Changes Group.

The markup for the change, and the note about it in the margin, disappear as the change is accepted into the document.

The next change, italicizing the "Classic Las Vegas" text, should be automatically selected.

3. Click the Reject button in the Changes group.

The markup for the change, and the note in the margin, are removed as the formatting change is undone. The text is no longer italicized.

Compare Documents

Comparing lets you see the differences between two documents. For example, if you and a co-worker have made changes to the same document in separate files, you can combine them together to see all the changes in one document, making it easier to accept or reject them.

Open the Compare View

- 1 Click the **Review** tab on the ribbon.
- 2 Click the **Compare** button.
- 3 Select **Compare**.

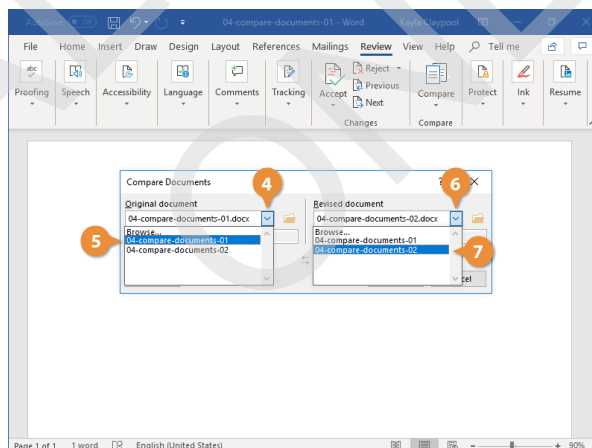
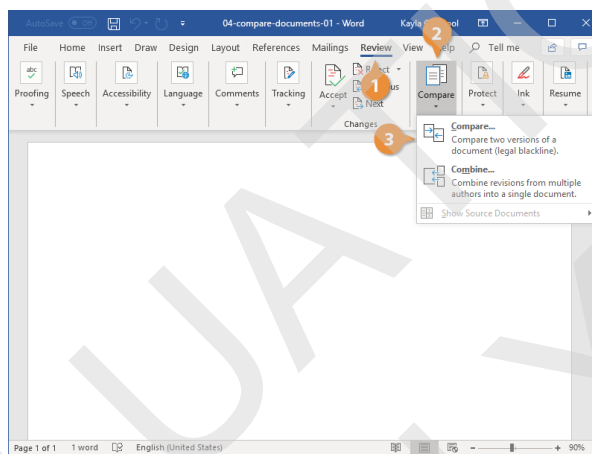
A dialog box appears where you can select the two documents that you'll be comparing.

- 4 Click the **Original document** list arrow.

Documents that you've opened recently will be listed here. If the document you're looking for is listed, select it. Otherwise, click the Browse button and locate it.

- 5 Select your document.
- 6 Click the **Revised document** list arrow.
- 7 Select the document you want to compare to the original.

Once both documents are selected, you could compare them now by clicking OK, or access additional options to control how they're compared.



Commented [IG14]:

Practice File:

04-compare-documents-01.docx
04-compare-documents-02.docx

Commented [IG15]:

1. With 04-compare-documents-01.docx open, click the Review tab.
2. Click the Compare button
3. Select Compare.
4. Click the Original document list arrow.
5. Select 04-compare-documents-01.docx.
6. Click the Revised document list arrow or click the Folder icon next to it to Browse for the file.
7. Select 04-compare-documents-02.docx.
8. Click the More button and review the available settings with students.
9. Click OK.

If either of the documents has Track Changes turned on, a dialog box will open informing you that, for the purpose of comparing changes, all tracked changes will be accepted.

8 Click the **More** button in the Compare Documents dialog box.

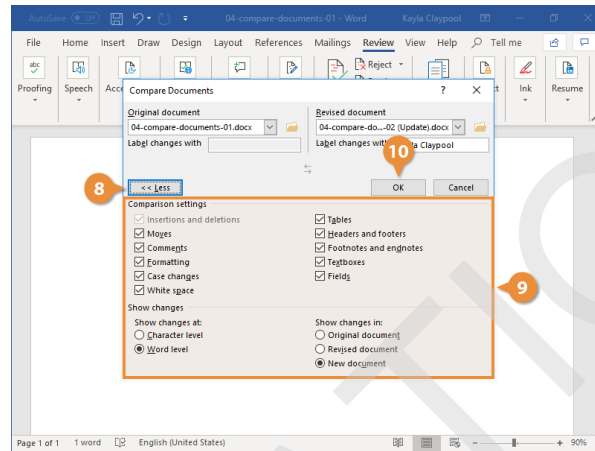
You can, for example, choose whether to compare or ignore certain elements such as formatting, headers and footers, comments, or text case changes.

You can also specify whether changes are marked at the character level or word level, and whether to show the changes between documents in the original document, the revised one, or in a new merged document.

9 Customize the comparison options.

10 Click **OK** when you're done.

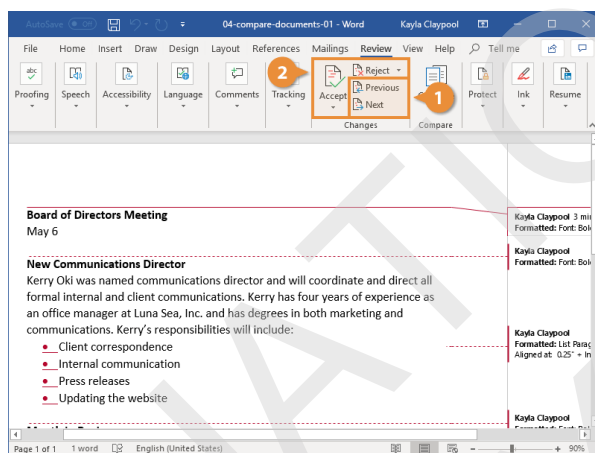
A new document is created, merging the two documents into one and highlighting any differences.



Accept or Reject Differences

Once the documents have been combined, you can browse through the differences and accept or reject them. The Revisions pane will appear on the left, the compared document in the middle, and the original and revised documents on the right.

- 1 Click **Next Change** or **Previous Change** to browse the differences between the documents.
- 2 Click **Accept** or **Reject** to accept or reject differences.



Commented [IG16]:

1. Click the Next Change button a few times to browse through the differences between the documents.
2. Once the change that changes "web site" to "Website" is selected, click the Accept button.

Line Numbers

Commented [IG17]:
Practice File: 05-line-numbers.docx

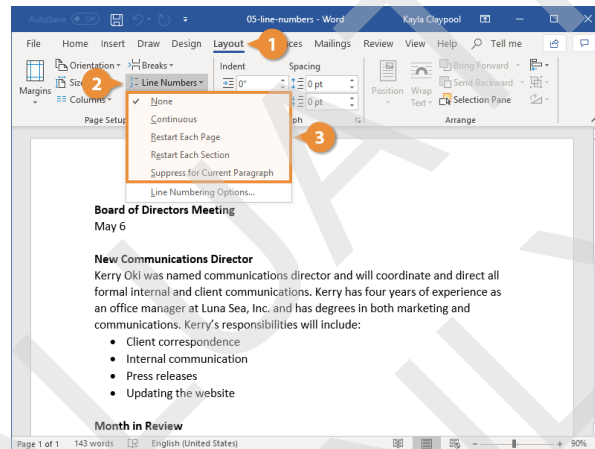
Adding line numbers to documents is the easiest way to guide users through complex, lengthy documents. For example, instead of pointing out that some relevant information is near the middle of the third paragraph, you can instead refer to the specific line, making it easier to find. Line numbers are especially useful for referendums and legal documents.

Add Line Numbers

When you add line numbers in Word, the numbers are displayed in the left margin of the document. If there are columns in the document, the numbers appear to the left of each column.

- 1 Click the **Layout** tab on the ribbon.
- 2 Click the **Line Numbers** button.
A menu appears with a few options for adding line numbers.
 - **None:** Removes line numbering in the document.
 - **Continuous:** Adds continuous line numbering throughout the document.
 - **Restart Each Page:** Restarts numbering at the beginning of every page.
 - **Restart Each Section:** Restarts numbering at the beginning of every section.
 - **Suppress for Current Section:** Removes line numbering for the current section.
- 3 Select a line numbering option.

Line numbers are added to the document.



Commented [IG18]:

1. Click the Layout tab.
2. Click the Line Numbers button

Explain to your students what the different options mean:

- **None** will display no line numbers
- **Continuous** will display one continuous set of line numbers
- **Restart Each Page** will display line numbers that start over on each page
- **Restart Each Section** will display line numbers that restart at every section break
- **Suppress for Current Section** disables line numbers for the current section

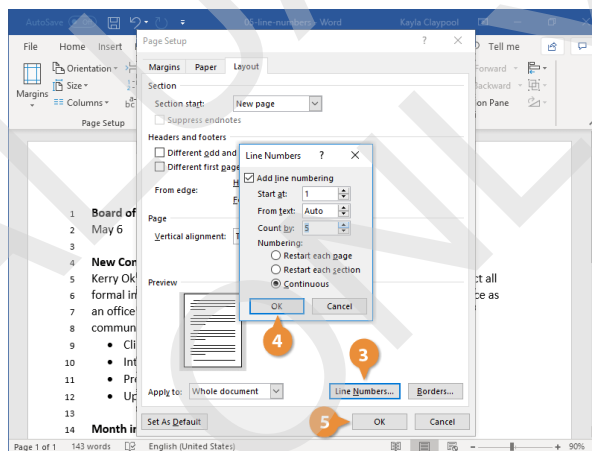
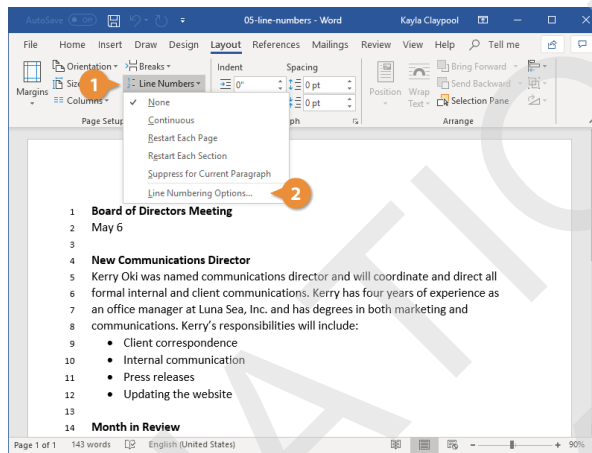
3. Select Continuous.

Customize Line Numbers

Once you've added line numbers to your document, you can adjust how they behave and appear.

- 1 On the Layout tab, click the **Line Numbers** button.
- 2 Select **Line Numbering Options**.
- 3 Click the **Line Numbers** button.
- 4 Change the options to customize your line numbers and click **OK**.
- 5 Click **OK** to close the Page Setup dialog box.

The line number options are updated to the settings you chose.



Commented [IG19]:

1. Click the Line Numbers button again.
2. Select Line Numbering Options.
3. Click the Line Numbers button at the bottom-right of the dialog box.

Show that line numbers can be toggled on or off here with the check box at the top, and that the three numbering options at the bottom correspond to the options from the Line Numbers menu.

The three text fields in the middle are new options, so explain what these do:

- **Start at** will change the number the line numbering starts at. (So, for example, you can start counting up from 10 instead of 1.)
- **From text** controls how far into the margin the line numbers are pushed. Don't push them too far, or they'll disappear off the edge of the page.
- **Count by** changes how often line numbers appear. (For example, setting this to 2 will number every other line, or setting it to 5 will show every fifth line number.)

4. Change the Count by number to 5.
5. Click OK to close the Line Numbers dialog box.
6. Click OK to close the Page Setup dialog box.

The line numbers now only appear for every fifth line.

Protect Documents

When a document is finished, you have a few ways to let others know that further edits aren't needed, and to prevent them from making any edits at all.

Mark as Final

Marking a document as final lets others know that it's finished and no further edits are necessary. It also removes proofing and editing markup.

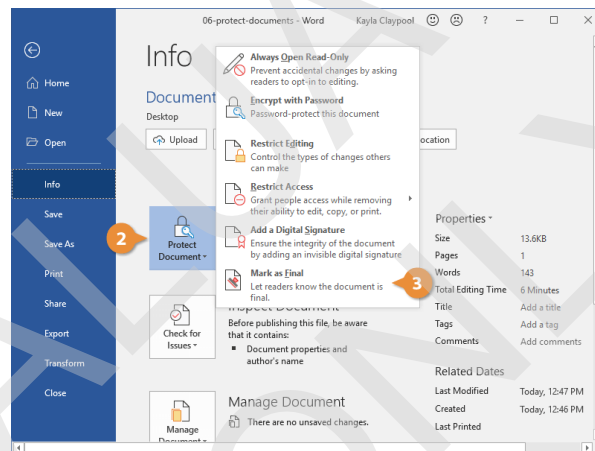
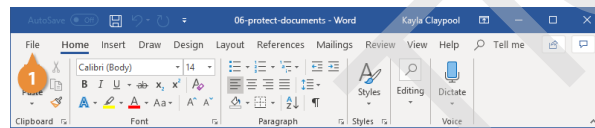
1 Click the **File** tab.

2 Click the **Protect Document** button.

Several options for protecting a document appear here.

3 Select **Mark as Final**.

The first confirmation dialog box lets you know that marking a document as final will also save it.



Commented [IG20]:
Practice File: 06-protect-documents.docx

Detail for your students the difference between marking a document as final and password protecting it.

Commented [IG21]:

1. Click the File tab.
2. Click the Protect Document button.
3. Select Mark as Final.
4. Click OK to close the warning dialog boxes.

Notice that the ribbon is now hidden to discourage further editing.

Repeat these steps to toggle Mark as Final off before continuing.

4

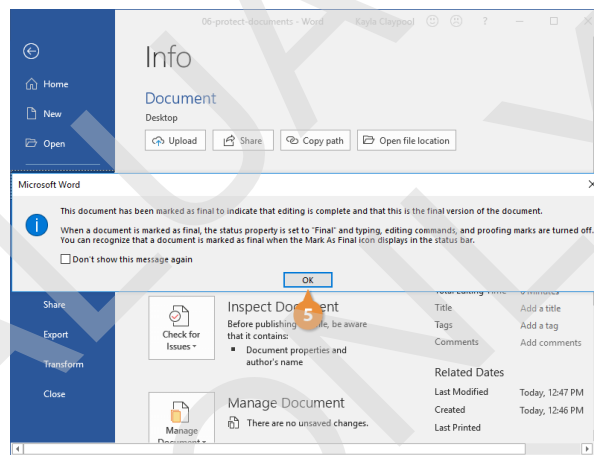
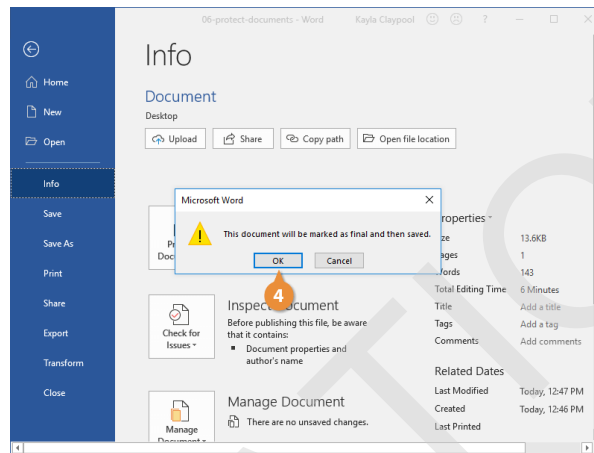
Click **OK**.

A second confirmation dialog box appears. This one explains a bit about what marking a document as final will do.

5

Click **OK**.

All typing, editing commands, and proofing marks are cleaned up. The ribbon is hidden to discourage editing and a Marked as Final icon appears in the status bar.

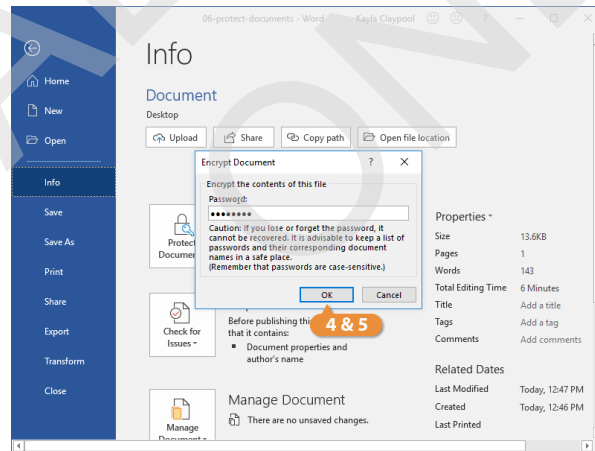
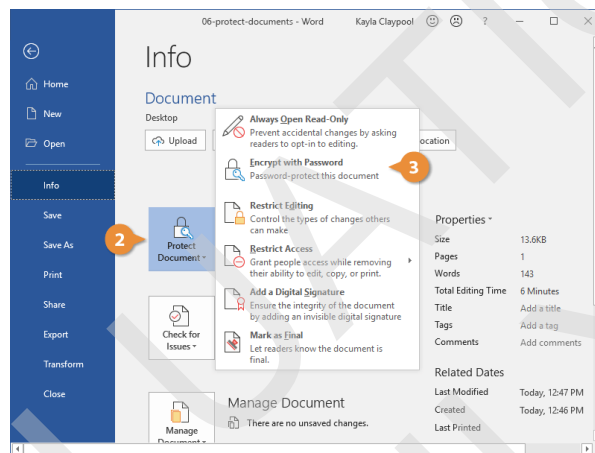
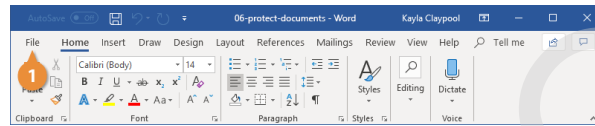


Password Protect a Document

If a document will still need a few changes, but only from specified individuals, you can also password-protect a document to limit who can open and edit it.

- 1 Click the **File** tab.
- 2 Click the **Protect Document** button.
- 3 Select **Encrypt with Password**.
The Encrypt Document dialog box appears with a password field, where you can enter a password.
- 4 Type your password into the field and click **OK**.
- 5 Reenter the password in the field and click **OK**.

Now anyone who wants to open the document will need to enter the password first.



Commented [IG22]:

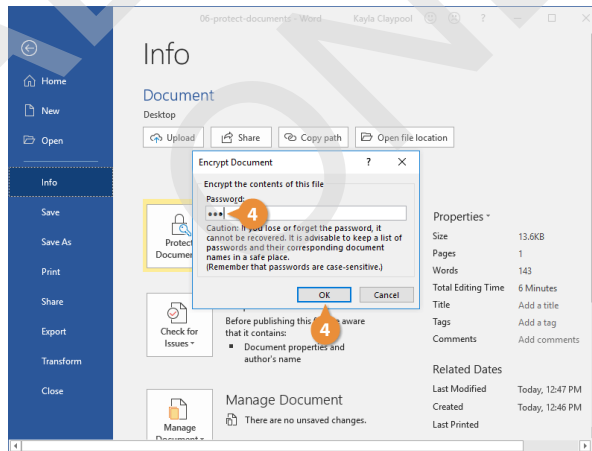
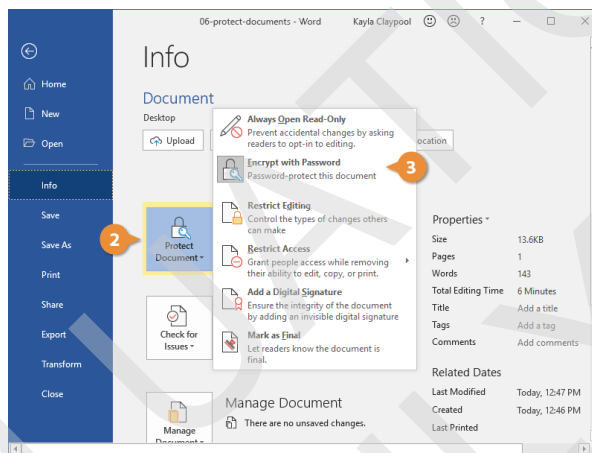
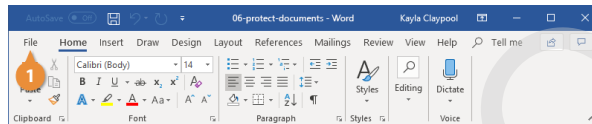
1. Click the File tab.
2. Click the Protect Document button again.
3. Select Encrypt with Password.
4. Enter "Password" in the Password text field and click OK.
5. Reenter that password and click OK.
6. Save and close the document.

Remove a Password

Setting a password on a document isn't permanent. If you need to remove it, you can. Once the password is correctly entered to open the protected file, you can follow the steps to remove it.

- 1 Click the **File** tab.
- 2 Click the **Protect Document** button.
- 3 Select **Encrypt with Password**.
The Encrypt Document dialog box opens again, with the password filled in already.
- 4 Delete the password in the field.
- 5 Click **OK**.

The password is removed and no longer required to open the document.



Commented [IG23]:

1. Reopen the practice file, entering the password when prompted.
2. Click the File tab.
3. Click the Protect Document button.
4. Select Encrypt with Password.
5. Delete the password from the text field.
6. Click OK.

Inspect a Document

Commented [IG24]:
Practice File: 07-inspect-a-document.docx

If you're going to be sharing a document digitally, you may want to check for hidden text like watermarks, comments, and other metadata that should be removed before publishing.

Inspect a Document

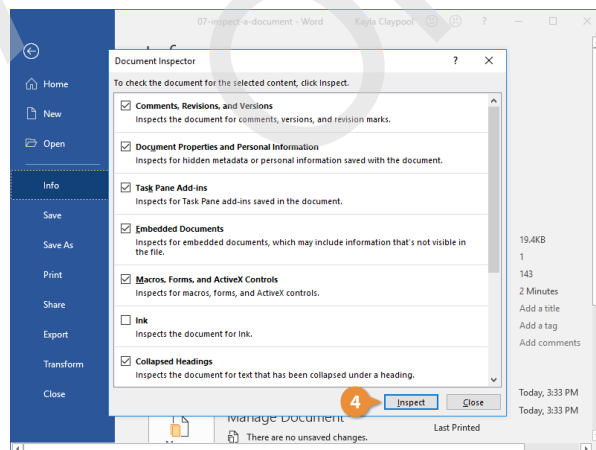
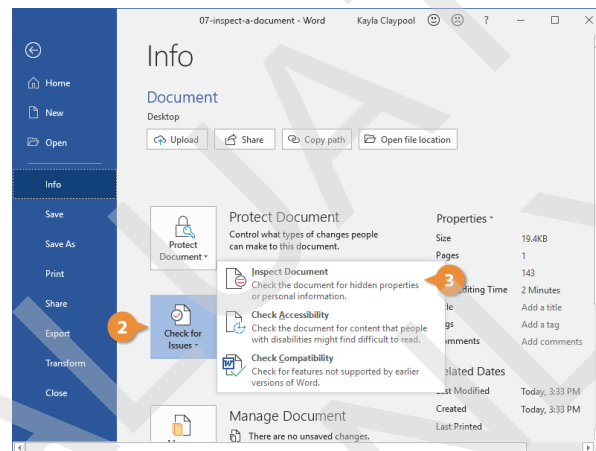
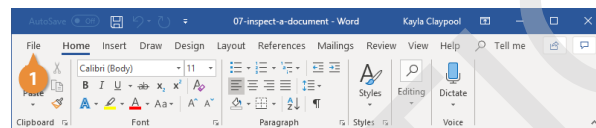
- 1 Click the **File** tab.
- 2 Click **Check for Issues**.
- 3 Select **Inspect Document**.

The Document Inspector dialog box opens. This lists all of the kinds of hidden data you can find in a document.

- Comments, versions, and revision marks
- Document properties and personal information
- Task pane add-ins
- Embedded documents
- Macros, forms, and ActiveX controls
- Collapsed headings
- Custom XML data
- Headers, footers, and watermarks
- Invisible content
- Hidden text

- 4 Select which hidden data you want to check for, then click **Inspect**.

The document is analyzed, and any instances of the selected hidden data are noted.



Commented [IG25]:

1. Click the File tab.
2. Click Check for Issues.
3. Select Inspect Document.
4. Click Inspect.

Some revision marks, comments, and document properties will be identified.

5. Click the Remove All button for the Comments, Revisions, and Versions group to remove all the elements that are found.

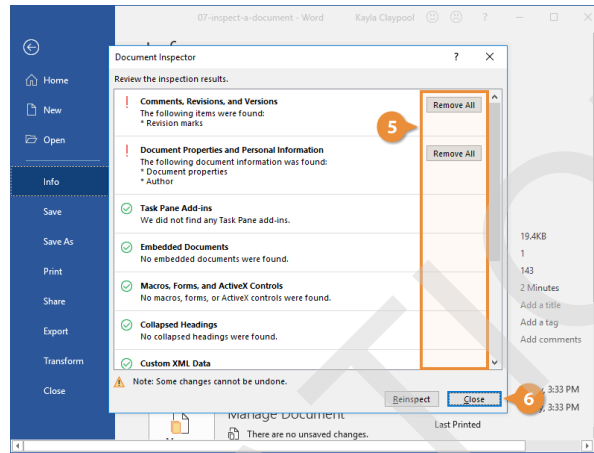
The comments and revision marks are removed from the document.

6. Click Close when you're done.

5 Click the **Remove All** button next to a category's results to remove those elements.

6 Click **Close** when you're done.

The hidden elements are removed from the document, and it's ready for distribution.



Forms

You can use Word to create interactive digital forms that other people can fill out on their computers before printing or sending them back to you. It takes a little preparation but keeps you from having to decipher messy handwriting! Some of the tools you will use when creating a form include:

- **Templates:** Forms are normally saved as templates so that they can be used again and again.
- **Content controls:** The areas where users input information in a form.
- **Tables:** Tables are often used in forms to align text and form fields, and to create borders and boxes.
- **Protection:** Users can complete the form fields without being able to change the form's text and/or design.

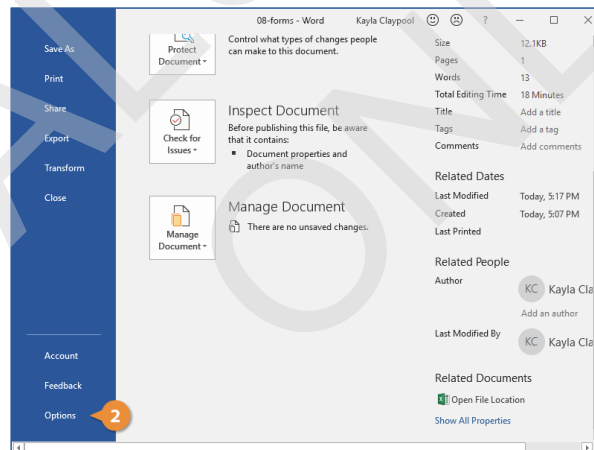
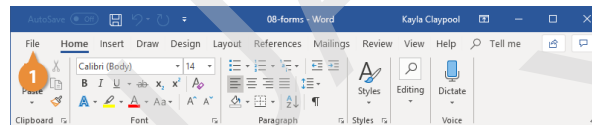
Show the Developer Tab

Before you can create a form, you'll need to turn on the Developer tab to get access to the advanced tools.

1 Click the **File** tab.

2 Select **Options**.

The Word Options window opens.



Commented [IG26]:

Practice File: None. Start with a new blank Word document.

Go over the definitions of items your students will use to create forms:

- Templates
- Content Controls
- Tables
- Protection

Commented [IG27]:

1. Click the File tab.
2. Select Options.
3. Click the Customize Ribbon tab.
4. Check the Developer check box.
5. Click OK.

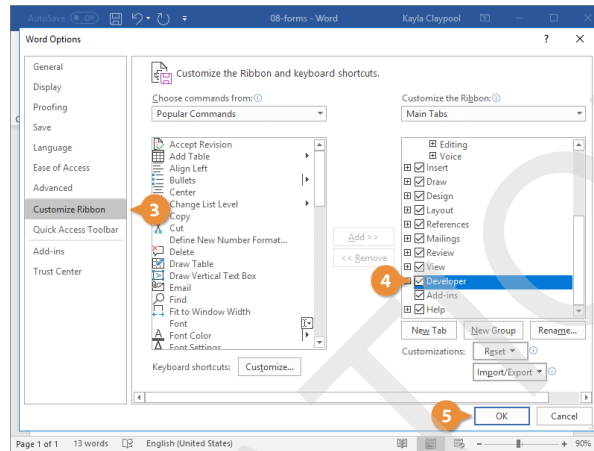
3 Click the **Customize Ribbon** tab on the left.

The column on the right controls which ribbon tabs are enabled.

4 Check the **Developer** check box.

5 Click **OK**.

The Developer tab now appears on the ribbon. In addition to advanced tools for macro recording, add-ins, and document protection, we now have access to form controls.



Create a Form

Once you've enabled the Developer tab, and created the layout and structure of the form, you can start adding form fields to your document with Content Controls.

- 1 Place the text cursor where you want to insert the form field.
- 2 Click the **Developer** tab on the ribbon.

The Controls group contains the different kinds of content controls you can add to a form, as well as the toggle button for Design Mode.

- 3 Click the **Design Mode** button in the controls group.

While Design Mode is active, controls you insert won't be active, so clicking a check box to move it around won't also check it. You can also customize placeholder text for some controls.

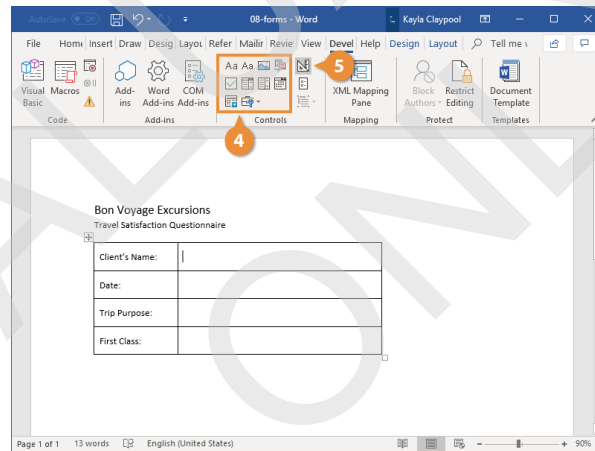
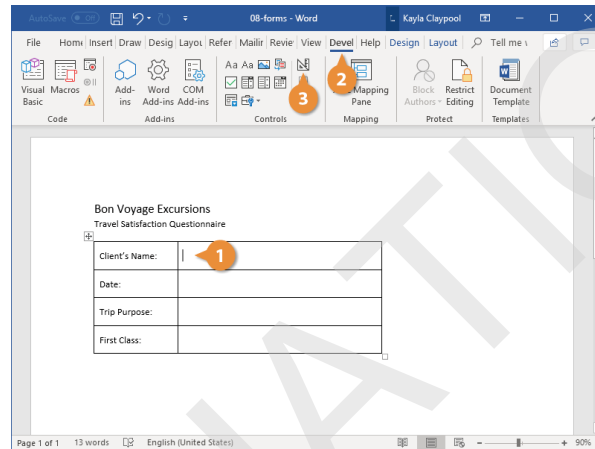
- 4 Click a **Content Control** buttons to insert the selected type of control.

The content control is inserted.

Tip: Select a form field and click the **Properties** button on the ribbon to edit a control's options. Depending on the type of control you've inserted, you can change its appearance, set up the options in a list, or lock the control once edited.

- 5 When you're done, click the **Design Mode** button again to exit Design Mode.

You leave Design Mode, and the content controls that you've inserted can now be used.



Commented [IG28]:

First, have students create a simple table with 2 columns and 4 rows. Enter the following row labels:

- Client's Name
- Date
- Trip Purpose
- First Class

1. Click inside the document.










2. Click the Developer tab.

3. Click the Design Mode button.

4. Use the Content Control buttons to build form fields in the second column of the table, collecting the Client's Name (plain text), Date (date picker), Trip Purpose (drop-down list), and whether or not they are flying First Class (check box).

Explain to your students all the different Content Control options and how they work. For example, click in the Trip Purpose drop-down control you just added and click the Properties button in the Controls group of the ribbon. From the Content Control Properties dialog box, add the drop-down options "Business" and "Pleasure".

5. Click the Design Mode button again to turn it off and view the form as someone filling it out would.

Form Content Controls		
	Rich Text	A text input field that allows for rich text formatting.
	Plain Text	A text field limited to plain text, so no formatting can be included.
	Picture	Accepts a single picture.
	Building Block Gallery	Shows a gallery of formatted design choices from the Quick Parts gallery.
	Combo Box	Creates a list that users can edit directly.
	Drop-Down List	Users choose from several selections that appear by clicking the list arrow.
	Date Picker	Users select a date and the control automatically formats the date's appearance.
	Check Box	Inserts a check box into a form.
	Legacy Tools	Contains the form controls from previous versions of Word.

Finalize a Form

When you're ready to distribute a form so others can fill it out, you can restrict the form so that content controls cannot be removed or changed by those filling it out.

- 1 Click the **Restrict Editing** button on the Developer tab.

The Restrict Editing pane appears on the right.

- 2 Check the **Editing restrictions** check box.

- 3 Click the **Editing restriction** list arrow.

- 4 Select **Filling in forms**.

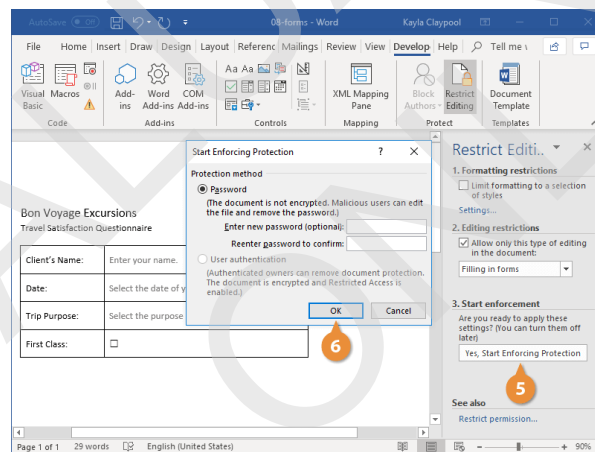
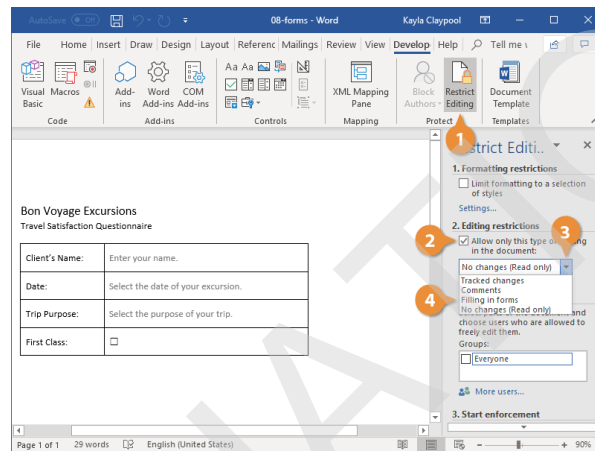
When this option is enabled, the only change that anyone else can make to this document is the filling in of form fields. They won't be able to move, delete, or edit the fields themselves until protection is turned off.

- 5 Click the **Yes, Start Enforcing Protection** button.

A password is not required to start enforcing protection, but you can add one if you'd like to prevent just anyone from turning this protection off.

- 6 Enter a password (optional), then click **OK**.

The document is now restricted, and anyone you send it to will only be able to fill in the forms.



Commented [IG29]:

1. Click the Restrict Editing button on the Developer tab.
2. Check the Editing restrictions check box.
3. Click the Editing restrictions list arrow.
4. Select Filling in forms.
5. Click the Yes, Start Enforcing Protection button.
6. Enter a password, then click OK.