

## Create a new template

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## Learn about templates

A template is a document type that creates a copy of itself when you open it. In Microsoft Office Word 2007, a template can be a .dotx file, or it can be a .dotm file (a .dotm file type allows you to enable macros in the file).

For example, a business plan is a common document that is written in Word. Instead of creating the structure of the business plan from scratch, you can use a template with predefined page layout, fonts, margins, and styles. All you have to do is open a template, and fill in the text and the information that is specific to your document. When you save the document as a .docx or .docm file you save your document separately from the template on which it is based.

Templates are exactly like documents in that you can provide recommended sections or required text for others to use, as well as content controls such as a pre-defined drop-down list or a special logo. You can add protection to a section of a template, or you can apply a password to the template to help protect the contents of the template from changes.

You can find Word templates for most kinds of documents on Microsoft Office Online. If you have an Internet connection,

click the **Microsoft Office Button**  , click **New**, and then click the template category that you want. Alternatively, you can create your own templates.

**NOTE** Highly structured and complex templates, such as a tax preparation form, may be best created in a forms creation program such as Microsoft Office InfoPath 2007.

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## Create a template

You can start with a blank document and save it as a template, or you can create a template that is based on an existing document or template.

## Start with a blank template

1. Click the **Microsoft Office Button** , and then click **New**.
2. Click **Blank document**, and then click **Create**.
3. Make the changes that you want to the margin settings, page size and orientation, styles, and other formats.

You can also add instructional text, content controls such as a date picker, and graphics that you want to appear in all new documents that you base on the template.

4. Click the **Microsoft Office Button** , and then click **Save As**.
5. In the **Save As** dialog box, click **Trusted Templates**.
6. Give the new template a file name, select **Word Template** in the **Save as type** list, and then click **Save**.

**NOTE** You can also save the template as a **Word Macro-Enabled Template** (.dotm file) or a **Word 97-2003 Template** (.dot file).

7. Close the template.

## Create a template based on an existing document

1. Click the **Microsoft Office Button** , and then click **Open**.
2. Open the document that you want.
3. Click the **Microsoft Office Button** , and then click **Save As**.
4. Make the changes that you want to appear in all new documents that you base on the template.
5. In the **Save As** dialog box, click **Trusted Templates**.
6. Give the new template a file name, select **Word Template** in the **Save as type** list, and then click **Save**.

**NOTE** You can also save the template as a **Word Macro-Enabled Template** (.dotm file) or a **Word 97-2003 Template** (.dot file).

7. Close the template.

## Create a new template based on an existing template

1. Click the **Microsoft Office Button** , and then click **New**.

2. Under **Templates**, click **New from existing**.
3. Click a template that is similar to the one that you want to create, and then click **Create New**.
4. Make the changes you want to the margin settings, page size and orientation, styles, and other formats.

You can also add instructional text, content controls such as a date picker, and graphics you want to appear in all new documents that you base on the template.

5. Click the **Microsoft Office Button**  , and then click **Save As**.
6. In the **Save As** dialog box, click **Trusted Templates**.
7. Give the new template a file name, click **Word Template** in the **Save as type** box, and then click **Save**.

**NOTE** You can also save the template as a **Word Macro-Enabled Template** (.dotm file) or a **Word 97-2003 Template** (.dot file).

8. Close the template.

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## Add content controls to a template

You can offer flexibility to anyone who may use your template by adding and configuring content controls, such as rich text controls, pictures, drop-down lists, or date pickers.

For example, you might provide a colleague with a template that includes a drop-down list, but your colleague wants to use a different set of options in the drop-down list in the document that he's distributing based on your template. Because you allowed editing to the drop-down list when you added the content control to the template, your colleague can quickly and easily change the template to meet his needs.

## Add content controls

**NOTE** You can also add content controls to documents.

1. Click the **Microsoft Office Button**  , and then click **Word Options**.
2. Click **Popular**.
3. Select the **Show Developer tab in the Ribbon** check box, and then click **OK**.
4. Open the template to which you want to add content controls, and then click where you want to insert a control.
5. On the **Developer** tab, in the **Controls** group, click the content control that you want to add to your document or

template.

For example, you can click **Rich Text** to insert a rich text control that will appear in any document that is created by using the template.

**NOTE** If content controls are not available, you may have opened a document that was created in an earlier version of Word. To use content controls, you must convert the document to the Word 2007 file format by

clicking the Microsoft Office Button  , clicking **Convert**, and then clicking **OK**. After you convert the document, save it.

6. Select the content control and click **Properties** in the **Controls** group.
7. In the **Properties** dialog box, choose whether the content control can be deleted or edited when someone uses your template.
8. To keep several content controls or even a few paragraphs of text together, select the controls or the text, and then click **Group** in **Controls** group.

For example, perhaps you have a three-paragraph disclaimer. If you use the **Group** command to group the three paragraphs, the three-paragraph disclaimer cannot be edited and can be deleted only as a group.

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## Add instructional text to a template

Sometimes it's useful to include placeholder instructions for how to fill out a particular content control that you have added to a template. The instructions are replaced by content when someone uses the template.

1. On the **Developer** tab, in the **Controls** group, click **Design Mode**.
2. If you haven't already added a content control to your document, click where you want the control to appear, and then click a control.

**NOTE** If content controls are not available, you may have opened a document created in an earlier version of Word. To use content controls, you must convert the document to the Word 2007 file format by clicking the

Microsoft Office Button  , clicking **Convert**, and then clicking **OK**. After you convert the document, save it.

3. On the **Developer** tab, in the **Controls** group, click **Design Mode**.
4. Click the content control to which you want to add placeholder text.
5. Edit the placeholder text and format it any way you want.

If you add a text box content control and you want the placeholder text to disappear when someone types in their own text, in the **Controls** group, click **Properties**, and then select the **Remove content control when contents are edited** check box.

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## Save and distribute building blocks with a template

Building blocks are reusable pieces of content or other document parts that are stored in galleries to be accessed and reused at any time. You can also save building blocks and distribute them with templates. For example, you may create a report template that provides your template users with two cover letter types to choose from when they create their own report based on your template.

1. Save and close the template that you have designed just the way you want it and to which you want to add building blocks for template users to choose from.

2. Open the template.

Keep open the template to which you want to add building block options for template users.

3. Create the building blocks that you want to provide to your template users.

When you fill out the information in the **Create New Building Block** dialog box, in the **Save in** box make sure to click the template name.

4. Distribute the template.

When you send or make the template available to others, the building blocks you've saved with the template will be available in the galleries you specified.

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## Add protection to a template

You can add protection to individual content controls in a template to help prevent someone from deleting or editing a particular content control or group of controls, or you can help protect all of the template content with a password.

### Add protection to parts of a template

1. Open the template that you want to add protection to.
2. Select the content controls or the group of controls to which you want to restrict changes.
3. On the **Developer** tab, in the **Controls** group, click **Properties**.
4. In the **Content Control Properties** dialog box, under **Locking**, do any of the following:
  - Select the **Content control cannot be deleted** check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the

template.

- Select the **Contents cannot be edited** check box, which allows you to delete the control but does not allow you to edit the content in the control.

Use this setting when you want to protect text if it is included. For example, if you often include a disclaimer, you can help ensure that the text stays the same, and you can delete the disclaimer for documents that don't require it.

## Add protection to all of the contents of a template

1. Open the template that you want to help protect from changes.
2. On the **Developer** tab, in the **Protect** group, click **Protect Document**, and then click **Restrict Formatting and Editing**.
3. In the **Protect Document** task pane, under **Editing restrictions**, select the **Allow only this type of editing in the document** check box.
4. In the list of editing restrictions, click the restrictions that you want.
5. To choose additional restriction options, such as who can read or change the document, click **Restrict permission**.

Restriction options include setting an expiration date for the document and allowing users to copy content.

6. Under **Start enforcement**, click **Yes, Start Enforcing Protection**.
7. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **Enter new password (optional)** box, and then confirm the password.

**IMPORTANT** If you choose not to use a password, anyone can change your editing restrictions.

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