get the 'edge'

Instructions for utilising Word 2010 form features within Velg Training Templates

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Many of Velg Training templates are provided as Microsoft Word (.docx) formats utilising form fields and content control. In order to protect form fields, the document needs to be 'protected' (depending on the type of fields used in the particular document). This guides helps you learn to protect and unprotect documents in order to make changes to the overall template.

Unprotecting a form that is 'locked'

When you purchase a template that is a Word form it will automatically be protected to enable you to begin using the form immediately. If you wish to make changes to that template (i.e. add more rows into a table or put your company name and logo into the header) you will need to firstly unprotect the form.

1. Click on the *Review* tab
2. Click on *Restrict Editing* in the *Protect* group
3. A menu will appear down the right hand side of your screen. Select '*Stop Protection*'
4. You will now be able to edit the document template (including headers and footers)
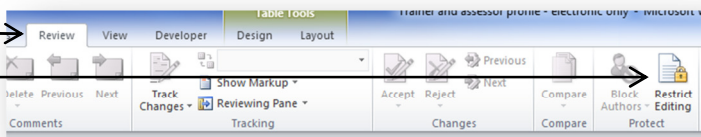
Protecting a form to enable data entry

If you have unprotected your form, you will need to 're-protect' it before you start to enter any data. If you don't do this you will delete any form fields that you try to type on. You also need to ensure the form is protected to allow you to use drop down menus.

1. Follow steps 1 and 2 above to enable the *Restrict Formatting and Editing* menu on the right hand side of the screen
2. Ensure that option 2 Editing restrictions is ticked and '*Filling in forms*' is selected
3. Click on *Yes, Start Enforcing Protection*
4. You will be asked for a password. This is optional, you can leave both fields blank. If you choose to use a password you must remember what it is as there is no way to retrieve it.
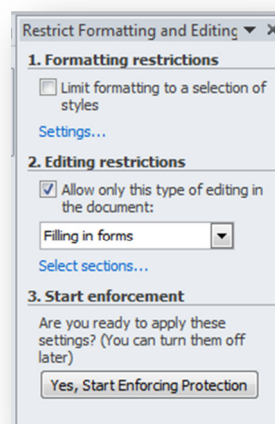

Inserting new fields

If you add in an extra row and you wish to insert new fields you will need to enable the Developer tab on the Ribbon.

1. Click on File
2. Click on Options
3. Click on Customise Ribbon
4. In the right hand column, tick the box next to Developer
5. Click on OK
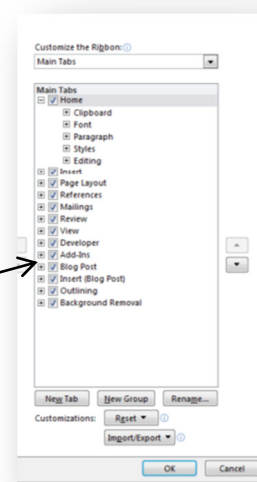
You will now have an extra tab on your Ribbon. This will contain a *Controls* group.

1. To access the traditional (legacy) tools which are those that have grey shading, click on the yellow toolbox. This will provide you with the drop down list of Legacy form tools.
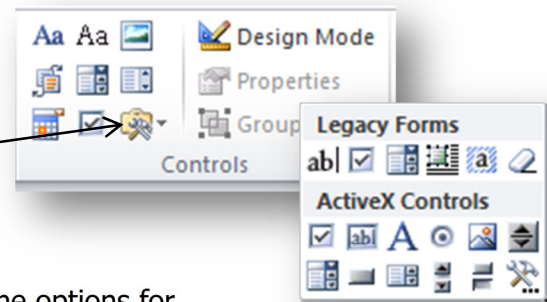
2. From left to right in the box shown you will find the options for textbox, check box, combo box (will give you your list options), picture box and shading. If you want to insert any of these controls simply click on the relevant icon. You can double click on the box once inserted to change the properties (i.e. to have a checkbox crossed by default or to limit the number of characters in a textbox).

3. To access the Word 2010 controls you do not need to click on the yellow tool box. The controls are on the main menu (first graphic).
   Top row left to right: Rich text (allows formatting), plain text (no formatting), picture box
   Middle row left to right: Building block gallery (content control), combo box, drop down list
   Bottom row left to right: Date picker (content control), check box, Legacy tools

4. Note that the Word 2010 controls (those not in the yellow toolbox) do not require the form to be protected, however these do not work in earlier versions of Word