

Saving the Form as a Template

The form can be saved as a template or as a regular document in a document folder. To save the document as a template:

- ❖ Click **File** on the **Menu Bar**.
- ❖ Click the **Save As** option.
- ❖ Click the **Save as type** drop-down arrow at the bottom of the dialog box.
- ❖ Choose **Document Template** from the list of choices.
- ❖ The **Save as type** text box should say **Document Template**.
- ❖ The **Save in** box at the top of the dialog box should say **Templates**. This is the option that is available when a document is saved as a template.
- ❖ In the **File Name** box, input a name for the template, if desired.
 - The name defaults to the first line of the document.
 - That name may be used or changed, depending on what you want the document to be named.
- ❖ Click the **Save** button to save the document as a template.
- ❖ To use the form again:
 - Click **File** on the **Menu Bar**.
 - Click **New** from the list of options.
 - The **New Document Task Pane** will display.
 - Click the link for **On my computer**,
 - The **Templates** dialog box will display.
 - The **Template** that was created should appear under the **General** tab.
 - Click the template that is to be used.
 - Make sure that the **Document** option button is selected under **Create New**.
 - Click the **OK** button to exit the dialog box and open the new document.
 - When all the changes have been made to the document, click the **Save** button on the **Standard** toolbar.
 - When a template is used to create a document, the template is not changed.
 - A new document is created.

