

# Custom Forms

Microsoft Office Word 2007  
Form Library Administrator Guide



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*An administrator guide for editing and providing user assistance  
for your custom designed Microsoft Word 2007 form library*

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Revised, 2010. 2011.

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# Form Library Administrator Guide

This guide provides instructions for the form library administrator to edit forms and provide user assistance. It includes form library basics, how to use the form protection feature to allow for editing, and troubleshooting tips.

Your form library consists of custom designed forms and this instruction guide.

**Skill Level Required:** The instructions in this guide are intended for users who possess Intermediate Microsoft Word 2007 skills. It is recommended that the Form Library Administrator function at this skill level. This guide does not cover Microsoft Word 2007 formatting or editing basics.

## Form Library Basics

Your form library consists of Master template files. Always keep the Master template files in a safe place, such as on a backup disk.

### Creating Copies of the Templates

Create copies of the Master templates for daily use—do not alter the original Master template files. This way, if a template becomes corrupted, you have the original from which to make a new copy.

To make a copy of a Master template file, follow these steps:

1. Browse to the file.
2. Point to the file icon; click the right mouse button, then select **Copy**.
3. Point to an empty area in a folder; click the right mouse button, then select **Paste**.
4. Repeat for all Master template files.

You now have working copies of your form library Master templates.

**BEST PRACTICE:** *Do not alter the original Master template files. Create copies of the Master templates for daily use. Store the Master files in a safe place.*

### Creating a New Form

To create a new form, double-click the form template icon. This opens a new document based on the template. For best results, follow these tips:

1. Immediately save the new document before filling out the form. (Save as docx or dotx only.)
2. Use a unique, descriptive name for each saved form.
3. Always create a fresh form from the template. Do not create new forms from old forms. This can result in broken or missing form fields, inoperable macros, or corrupted files.

## About the Author

Susan Huckle is a certified technical writer who specializes in Microsoft Word 2007. She offers consulting and technical writing services to nonprofit clients throughout the United States. She also provides assistance to tens of thousands of users per month through her instructional website, Word-Tips.

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