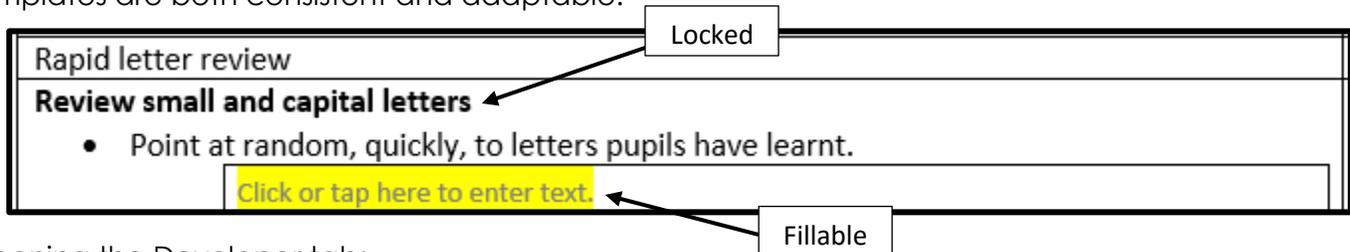


**Webinar 2: Handout 10****Creating Locked Templates**

Mackenzie Matthews, FHI360 | CIES 2018

Creating locked, fillable templates is a strategy for design and quality control in large-scale materials development. In these templates, the content that should not be edited is locked and fillable boxes are inserted for content that is to be inputted by the materials writer. This ensures templates are both consistent and adaptable.



Opening the Developer tab:

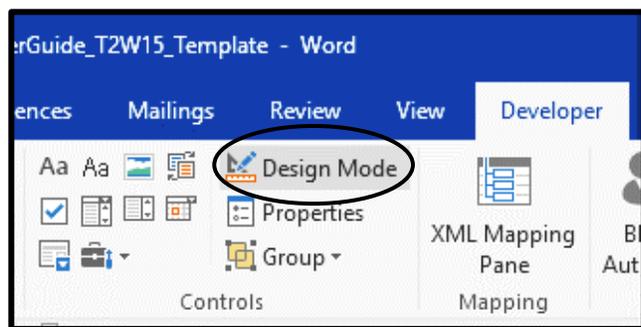
All functions related to creating locked templates are found in the Developer tab of Microsoft Word.

1. Click the **File** tab → **Options** → **Customize Ribbon**
2. Under **Customize the Ribbon**, in the **Main Tabs** list, select **Developer** and click **OK**.

Creating fillable text boxes in your template:

Fillable boxes are spaces for a materials writer to insert original content. All the controls to do this are found in the Developer tab.

1. Under the Developer tab, click **Design Mode**. This will show you the various content controls you are adding. The boxes and content controls shown in Design Mode will not print.

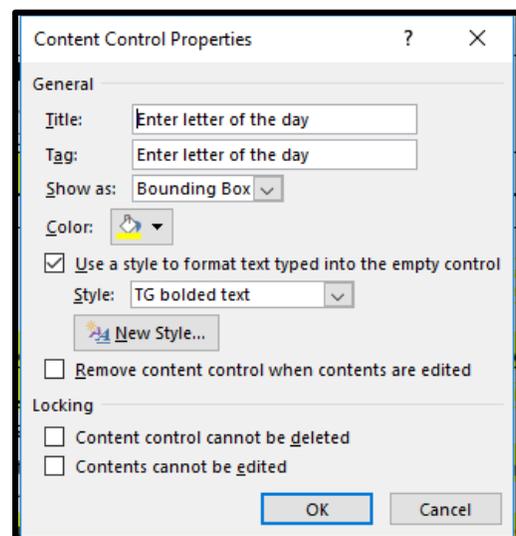


2. Under Developer tab, click **Rich Text Content Control** (allows writers to format text as bold or italic, and type multiple paragraphs) or **Plain Text Content Control** (allows writers to insert plain text without line breaks). This will add a fillable box to your template.

3. Click on the box. Under the Developer tab, click **Properties** to set the properties for the box:
  - Add a label to help writers know what should go into the box.
  - Set the style for content entered into the box. (*Optional* – Name and save the style for later use.)

4. *Optional* – Change the standard text in the box ("Click or tap here to enter text") to suggested scripting or other tips.

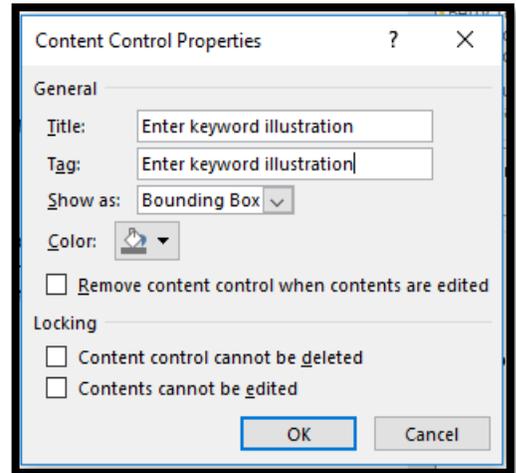
5. *Optional* – Click the label of your box to select it. Under the Home tab, click the **Text Highlight Tool**



## Creating fillable image boxes in your template:

Image boxes indicate where a writer or illustrator should insert illustrations, icons, or pictures.

1. Under Developer tab, click **Picture Content Control** 
2. Click on the box. Under the Developer tab, click **Properties** to set the properties for the box:
  - Add a label to help writers know what should go into the box.



## Locking and unlocking your template:

Locking your template will ensure that users will be able to edit only the fillable text and image boxes you've set up. Anything not inputted using the Developer tab will be locked.

1. Select all (CTRL+a) of your document.
2. Under Developer tab, click **Group**. From the drop-down menu, choose *Group*.
  - Your template is now locked and ready for distribution!

Unlocking your template will allow you to make further edits to the content and fillable boxes.

1. Select all (CTRL+a) of your document.
2. Under Developer tab, click **Group**. From the drop-down menu, choose *Ungroup*.

