

# LAYOUT

## Create a Template/Form Overview

**GOAL:** Create templates of customer-supplied materials.

Measurable Learner Objectives	Crosswalk to Show-Me Standards	Instructional Activities	Assessment
Complete a project using customer-supplied instructions and/or materials. A13	CA4, 2.1	Collect two business forms from an organization (or school office). Determine if the organization would like to update any information in these forms. Recreate the forms, with any updates and appropriate underlines and/or check boxes, so information can be keyed without changing the appearance of the form. Proofread and correct all errors. Have the form approved by the organization representative. Submit the form on a disk or via e-mail attachment to the organization. Practice good file management.	Use the <i>Create a Template</i> assessment to evaluate the recreation of the two business forms obtained from an organization, in respect to the updates/modifications indicated (if any), underlines and/or check boxes that won't change when information is keyed, accuracy and proofreading skills, and file management.
Create templates. B8	CA1, 2.1		
Set margins. B1	CA1, 2.1		
Manage electronic files. A9	CA3, 1.8		
Proofread and correct errors. C8	CA1, 2.1		

Activity originally developed by Zinna Bland; adapted and used with her permission.

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## Create a Template/Form

### Teaching Points

#### Overview

With the demise of the typewriter, electronic templates and forms are created and completed on the computer, which make information and data gathering easier, quicker, and neater. This assignment allows students to create two templates and/or forms from an organization or their school with lines and/or check boxes.

#### Content Review

Review and/or demonstrate the following as needed:

Form and template creations  
Lines and checkboxes

#### Activity Preparation

Discuss and brainstorm with students the information to be included in forms and ways decisions are made about the information to be included.

Review and/or discuss the steps in designing forms from sketches.

Review and/or demonstrate the creation of forms with lines or no lines, check boxes, and drop-down lists.

Review why a form/template should be secured and demonstrate how to secure a form/template.

Discuss the project and ways the students are to interact with the organizations from which templates/forms are obtained.

#### Resources

##### **Supplies needed for the activity:**

Computer  
Paper  
Printer  
Sample business forms

**Web sites (and/or key words to use for search):**

How to create a template and a form

<http://support.microsoft.com/default.aspx?scid=kb;en-us;q141990>

[http://www.apu.edu/imt/training/word/creating\\_forms.php](http://www.apu.edu/imt/training/word/creating_forms.php)

<http://www.rdg.ac.uk/ITS/Topic/WordProc/WoP2Kfrm01/>

<http://www.its.queensu.ca/educ/handout/tempform.html>

<http://www.glencoe.com/ps/computered/pas/article.php4?articleId=365>

[http://www.freedomscientific.com/fs\\_support/BulletinView.cfm?QC=449](http://www.freedomscientific.com/fs_support/BulletinView.cfm?QC=449)

<http://www.columbia.edu/cu/libraries/inside/forms/formtips.html>

[http://zircon.mcli.dist.maricopa.edu/mlx/warehouse/00301-00400/00383/making\\_word\\_forms.doc](http://zircon.mcli.dist.maricopa.edu/mlx/warehouse/00301-00400/00383/making_word_forms.doc)

**Key words:** *templates, forms*, or add *Word* to any of the key words

**Books, articles, and other resources:**

Hinkle, D. (2000). *Word 2000 level one: Core*. Peoria, IL: Glencoe (McGraw Hill).

Pasewark, W., Pasewark, S. G., and Morrison, C. (2002). *Microsoft Word 2002 – Complete tutorial*. Boston, MA: Thomson Course Technology.

Rutkosky, Nita. (2002). *Microsoft Word 2002: Signature series*. St. Paul, MN: EMC Paradigm.

Rutkosky, Nita. (2002). *Microsoft Word 2002: Core and Expert Certification*. St. Paul, MN: EMC Paradigm.

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## Create a Template/Form Assignment

### Activity Preparation and Assignment

Follow the directions below to recreate a form/template which may have modifications.

1. Create a project folder entitled [*insert your name*] *Form Template*.
2. Determine which office or organization will be used to obtain two business forms for recreation and have it approved by the instructor.
3. Contact the organization or office and collect two forms. Determine from the office professional or organization representative what, if any, corrections and/or updating are needed on the form. You want a form/template that has lines, check boxes, and other similar items that will be good as an electronic means to collect data.
4. Recreate the form/template with any modifications and/or corrections needed. Be sure to use lines, check boxes, etc.
5. Lock the form and make sure it works.
6. Proofread and correct any errors. Remember to unlock the form to make corrections and relock it afterwards.
7. Print a copy and have it evaluated and approved by the organization representative and your instructor (*Submission 1*). Submit a copy of the original with any modifications with this submission.
8. Make any corrections noted.
9. Submit the form by e-mail or on a floppy disk to the organization and the instructor for evaluation (*Submission 2*). Submit a copy of the original and/or a copy of the first submission evaluated template/form.
10. Submit a print screen of the project folder.

### Resources

#### **Web sites (and/or key words to use for search):**

[http://www.freedomscientific.com/fs\\_support/BulletinView.cfm?QC=449](http://www.freedomscientific.com/fs_support/BulletinView.cfm?QC=449)

How to create forms/templates

<http://www.columbia.edu/cu/libraries/inside/forms/formtips.html>

Tips for creating forms using MS Word

[http://zircon.meli.dist.maricopa.edu/mlx/warehouse/00301-00400/00383/making\\_word\\_forms.doc](http://zircon.meli.dist.maricopa.edu/mlx/warehouse/00301-00400/00383/making_word_forms.doc)

Good link with screen shots of how to create forms

<http://familycrafts.about.com/gi/dynamic/offsite.htm?site=http%3A%2F%2Fwww.kidprintables.com%2Fbookmarks%2F>

Some samples/examples of printable bookmarks

## LAYOUT

### Create a Template/Form Assessment

**Directions:** Rate on a scale of 10 (high) to 1 (low) the criteria for each category.

Criteria	10-9 Points	8-7 Points	6-5 Points	4-1 Points
<b>Layout (10)</b> <input type="checkbox"/> Looks like original <input type="checkbox"/> Modifications made <input type="checkbox"/> Lines and/or checkboxes				
<b>Submission (10)</b> <input type="checkbox"/> Template/form submitted <input type="checkbox"/> Original with modifications <input type="checkbox"/> Submission 1 <input type="checkbox"/> Submission 2				
<b>File Management (10)</b> <input type="checkbox"/> Print screen <input type="checkbox"/> Files included				
<b>Accuracy (10)</b> <input type="checkbox"/> Submission 1 <input type="checkbox"/> Submission 2 <input type="checkbox"/> Works correctly with input				
<b>Subtotal</b>				
			<b>Total Points =</b>	