

Create a Word Template for Use in Workflow

Requirements

Microsoft Word

Steps

Create a New Document Template

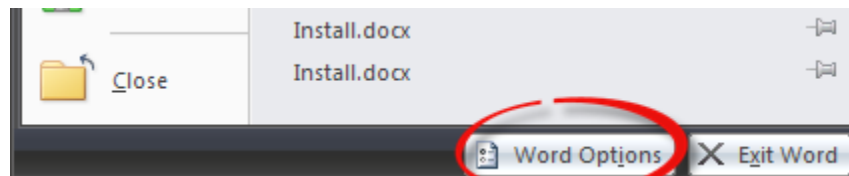
Open up Microsoft Word and create a new document template (.dotx).

Enable the Developer Tab

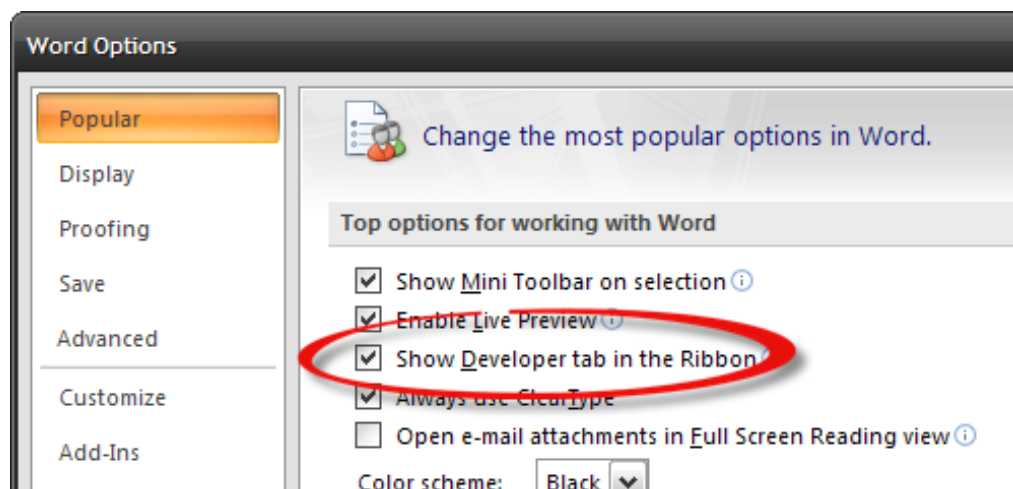
Before you begin, ensure the Developer Tab is enabled. If you don't see a menu item on the ribbon titled "Developer", click the big round "Office" button in the upper left-hand corner.



Click the "Word Options" button at the bottom part of the menu.



Under "Top options for working with word", check the box beside "Show Developer Tab in the Ribbon".



Close the dialog. You should see the Developer tab on the ribbon now.

Create Your Content

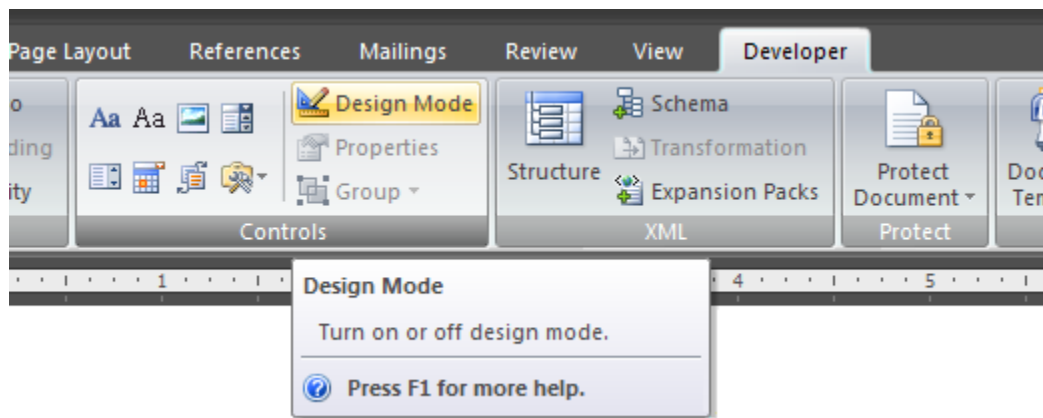
Type to your heart's content until you reach the point where you need data inserted. Leave your cursor there. (See image below.)

Workflow Summary Report

Process Summary for |

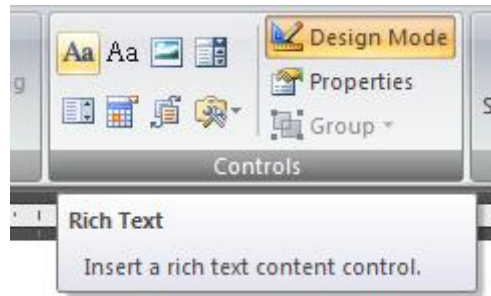
Bring up the Developer tab.

There's a section of the tab called "Controls." On the upper right side, you'll see a label called "Design Mode." Click it to enable Design Mode.



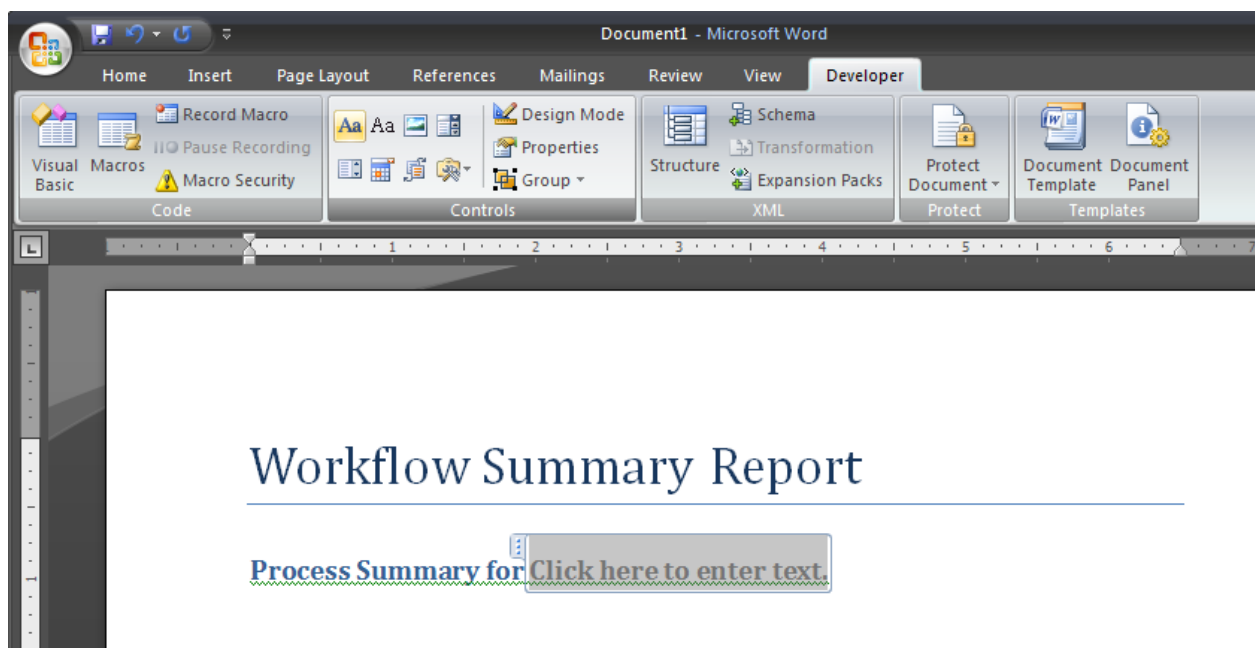
Rich Text Controls

In the upper left corner of the Controls area, there are two pairs of letters – the first looks like Rich Text and the second looks like Plain Text.



Hover over the Rich Text and click.

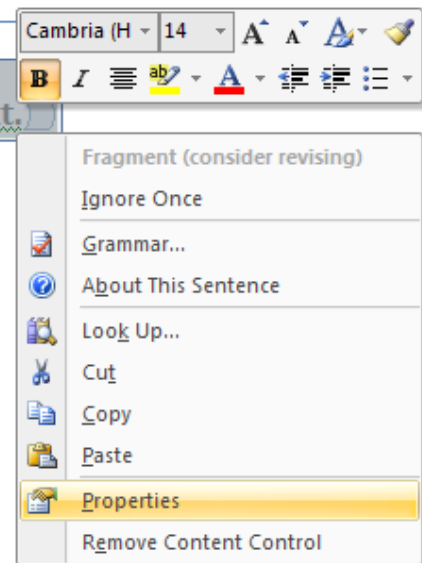
It will insert a Rich Text Control immediately following your cursor. (See? That's why I said leave your cursor in place.)



Notice that the inserted text is surrounded by a pair of what appear to be very thick, silver parenthesis. Right click on either and select "Properties."

Workflow Summary Report

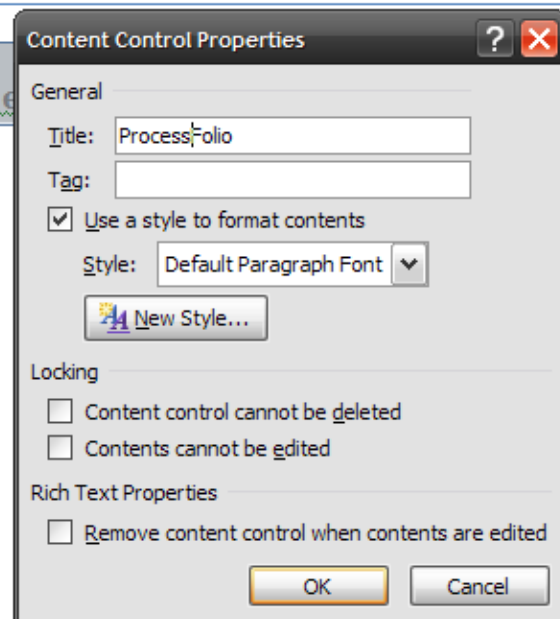
Process Summary for [Click here to enter text.](#)



Okay, this is where things get serious. In the Title field, you want to type what you're going to call the control. Perhaps the best method to use is to type the name that matches the name of the variable you're using to source it. In the example below, I'm calling this one ProcessFolio because that's the data I'm having K2 insert in this spot.

Workflow Summary Report

Process Summary for [Click here to enter text.](#)



You can leave the Tag field blank – Word will simply reproduce the value you placed in the Title field here.

Also, be sure to check the **Use a style to format contents** box. That way, whatever gets inserted here will use the same styling as is currently in place for this paragraph. In this case, the “Process Summary for” is all set as Heading 1, so the value that gets inserted will also appear in the Heading 1 style.

Speaking of styles, you can change your styles just like any normal Word document. Consider playing with different styles for your template – but try to keep to the styles and fonts that Word shipped with. Not everybody may have a font that you downloaded separately, or a style that was an add-on.

PROCESS SUMMARY FOR ProcessFolio CLICK HERE TO ENTER TEXT. ProcessFolio	
REQUEST INFORMATION	
Requestor:	RequestorDisplayName Click here to enter text. RequestorDisplayName
Request Datetime:	RequestDatetime Click here to enter text. RequestDatetime
Action Type:	ActionType Click here to enter text. ActionType
Application:	Application Click here to enter text. Application
Role:	Role Click here to enter text. Role
User:	UserDisplayName Click here to enter text. UserDisplayName
User Department:	UserDepartment Click here to enter text. UserDepartment

When you’ve used K2 to fill out the template, your finished product (say, at the end of a workflow) should look like a normal Word document.