## Dialog Driven Templates

A word template is used to reduce the effort involved in creating standard form letters and documents like legal forms. Templates have two components: a fixed, pre-written "boiler plate" that the user isn't intended to alter, and one or more places to enter information that is unique to this instance of the document, like names, addresses, case numbers….

Using a dialog form to enter the unique portions of a template has a number of advantages:

1. Elements that may appear multiple times in the final document (like names and dates) only need to be entered once.
2. Dates may be entered in any form and can be adjusted to the correct form. For example 12-5-15 could be corrected to December 5, 2015.
3. Entries may be selected from a pre-built list. Example: A list of current employees and their contact information.

The template solution I am presenting here consists of three main elements:

1. A macro enabled template (.dotm)
2. A user form attached to the template (UserForm1)
3. An excel workbook in a compatible format- .xls rather than .xlsx for now

Two types of Content Control are used: Plain Text and Date Picker.

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| --- | --- | --- | --- |
| Document | | | Dialog Form |
| Content Control Type | Tag | Placeholder text | Source Control |
| Plain Text | LBname | [Name] | ListA col 0 |
| Plain Text | LBnumber | [Number] | ListA col 1 |
| Plain Text | LBrank | [Rank] | ListA col2 |
| Plain Text | DATAname | [Name] | DATAname.Text |
| Date Picker | DATErecord | [Document Date] | DATErecord.Text |

The Dialog form (UserForm1) contains 3 input control types and 2 buttons