

Word 2003: Forms

Learning guide

Why use Word forms?

If you've ever worked on a project that involves collecting data from a group of people, you've probably designed a form using Word. Although a Word form is easier to distribute and use than a paper form, users will often print the form and send it back with handwritten information that may not be easy for you to read. In other cases, users may change the layout of your form to accommodate the information that they enter.

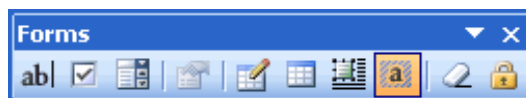
Word 2003 helps eliminate these problems by allowing you to add form elements – text boxes, checkboxes, and drop-down menus – to the forms you've already designed so that they can be easily used without the need for any format changes. Once you've inserted these elements, your users can enter their data (without disturbing the form's layout), save the form, and return it to you in hard copy or via email. The result is a form that's easy for everyone to use and highly readable for you.

Getting started

After you've designed your form in Word, you can insert form elements that will allow the users of your form to enter their information.

Displaying the forms toolbar

- From the **View** menu, select the **Toolbars** submenu.
- From the **Toolbars** submenu, select **Forms**.
- The **Forms** toolbar will appear as a floating window near the top of your document.



Adding form elements to your document

Once the Forms toolbar is visible, you can add form elements to your document. Word allows you to insert three kinds of form fields:

The form fields ...	Allow users ...
Text boxes	To enter any kind of text, including contact and descriptive information.
Check boxes	To answer a question by selecting one or more options from a set of responses. Also, to supply a yes or no answer to a question on your form.
Drop-down menus	To answer a question by selecting one option from a set of responses.

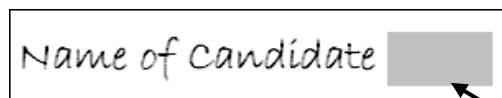
Adding a Text Field to your Document

Creating a text field

- Click to place the insertion point at the location in your document where you'd like to insert your text field.
- On the **Forms** toolbar, click on the **Text Form Field** button.



- Word will insert a text box to the left of your insertion point.



Text field

Tips:

- *If your form currently provides underlined areas for users to enter their responses, be sure to remove all of the underlining from each area before inserting your form fields.*
- *You can format the contents of a text field just like you can format any other text in a Word document:*
 - *Drag the cursor across the field to select it.*
 - *Right click on the field.*
 - *From the pop-up menu that appears, choose the **Font**, **Paragraph**, or **Bullets and Numbering** menu item to begin formatting the form field.*
 - *Any formatting you select will be applied to text entered by your users in that field.*

- To more easily identify your text field within your form, shade it in gray by clicking on the **Form Field Shading** button on the **Forms** toolbar.



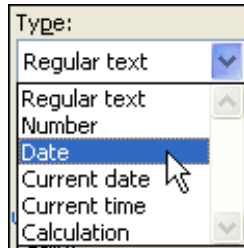
Customizing a text field

Once you've inserted a text form field, you can specify several options for the field.

- Double-click on a text field you inserted.
- The **Text Form Field Options** window will appear.

A screenshot of the 'Text Form Field Options' dialog box. The dialog has a blue title bar with the text 'Text Form Field Options' and a close button (X). The main area is light beige and contains several sections: 'Text form field' with 'Type' (Regular text) and 'Default text' (empty); 'Maximum length' (Unlimited) and 'Text format' (empty); 'Run macro on' with 'Entry' and 'Exit' (both empty); and 'Field settings' with 'Bookmark' (Text1), 'Fill-in enabled' (checked), and 'Calculate on exit' (unchecked). At the bottom are buttons for 'Add Help Text...', 'OK', and 'Cancel'.

- To specify the type of text that users will enter in this field:
 - Click on the down-facing arrow next to the box labeled **Type**.
 - From the drop-down menu, choose the type of text that is appropriate for the response to your question.



For your users to insert....	Choose....
Names; job titles; other text	Regular text
Numbers; currency values	Number
Dates	Date

To automatically insert....	Choose....
The date the form is completed	Current date
The time the form is completed	Current time
A calculated value	Calculation

- To specify a default value for your text field:
 - Click in the box labeled **Default text** and type the default value you wish to use.
- To specify the maximum number of characters that can be entered in your text field:
 - Click in the box labeled **Maximum Length** and type the maximum value.
- To specify the format for the contents of your text field:
 - Click on the down-facing arrow next to the box labeled **Text Format**. *If you have chosen the **Number** or **Date** format, this box may be labeled as **Number Format** or **Date Format**.*
- Click on the button labeled **Ok** to apply the options you selected to your text field.

Tip: When you first create your text field, its **Maximum Length** is **Unlimited**. However, when form users enter a great deal of text, Word may restructure the layout of your form to accommodate the text they enter. To prevent your form layout from changing, limit the number of characters that can be entered in your text field.

Adding a Check Box to your Document

Creating a check box

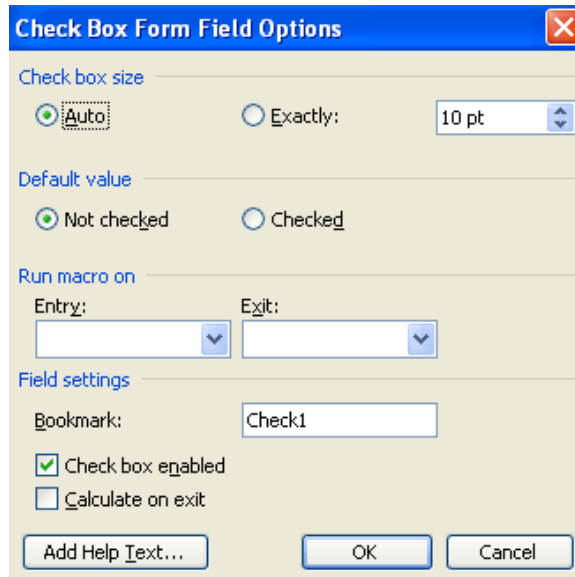
- Click to place the insertion point at the location in your document where you wish to insert your check box.
- On the **Forms** toolbar, click on the **Check Box Form Field** button.



- Word will insert a check box to the left of your insertion point.

Customizing a check box

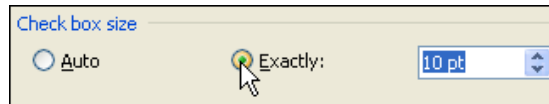
- Double-click on a check box you inserted.
- The **Check Box Form Field Options** window will appear.

A screenshot of the 'Check Box Form Field Options' dialog box. The dialog has a blue title bar with the text 'Check Box Form Field Options' and a close button (X). The main area is light beige and contains several sections: 'Check box size' with radio buttons for 'Auto' (selected) and 'Exactly:' followed by a '10 pt' dropdown; 'Default value' with radio buttons for 'Not checked' (selected) and 'Checked'; 'Run macro on' with 'Entry:' and 'Exit:' dropdown menus; 'Field settings' with a 'Bookmark:' text box containing 'Check1', a checked 'Check box enabled' checkbox, and an unchecked 'Calculate on exit' checkbox. At the bottom are buttons for 'Add Help Text...', 'OK', and 'Cancel'.

Specifying the size of your Box

When you create your checkbox, Word will assign an automatic size for the box based upon the size of the text in your form. To specify the size of your box:

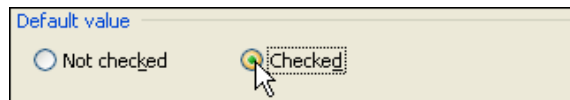
- On the **Check Box Form Field Options** window, locate the **Check Box Size** area.
- Click on the option button labeled **Exactly**.
- In the box to the right of the option button, enter the size (in points) for your checkbox.



To place a check mark by Default

In many cases, you may want to specify that your new checkbox will be checked by default if the most common answer to its question is **Yes**. To place a checkmark in the box by default:

- On the **Check Box From Files Options** window, locate the **Default Value** area.
- Click on the option button labeled **Checked**.



- Click on the button labeled **Ok** to apply the options you selected to your check box.

Adding a Drop-Down Menu

Creating a drop-down menu

- Click to place the insertion point at the location in your document where you wish to insert your new menu.
- On the **Forms** toolbar, click on the **Drop-Down Form Field** button.

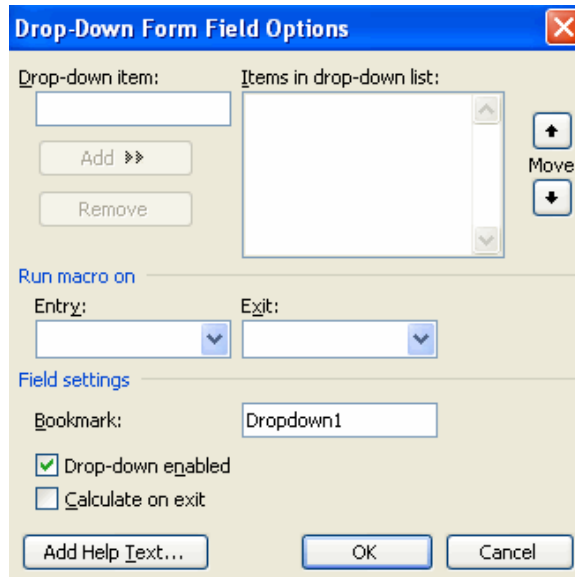


- Word will insert a drop-down menu to the left of your insertion point.

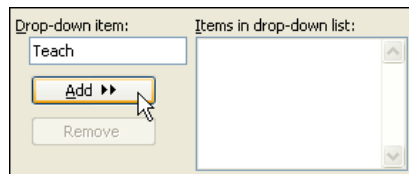
Adding items to a drop-down menu

Once you've created a drop-down menu, you can add items to the menu and organize them so that they are listed in the order that will be easiest to use.

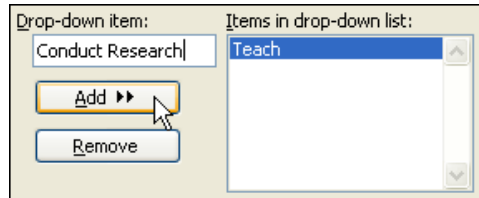
- Double-click on the drop-down menu you inserted.
- The **Drop-Down Form Field Options** window will appear.



- Click in the box labeled **Drop-down item** and type the first item to be displayed in your menu.
- Click on the button labeled **Add** to move the menu item into the box labeled **Items in drop-down list**.



- In the box labeled **Drop-down item**, type the second item to be displayed in your menu.
- Click on the button labeled **Add** to move the second menu item into the box labeled **Items in drop-down list**.
- Repeat these steps to add additional menu items.

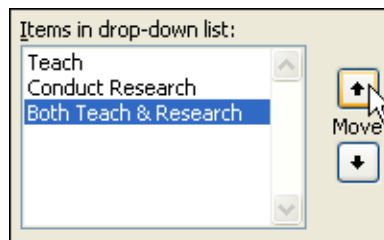


Reordering items in a drop-down menu

Unless you reorder the items in your menu, form users will see them in the order you added them to the menu. However, Word makes it easy to reorder your menu items.

To display a menu item in a position closer to the top of the menu:

- In the box labeled **Items in drop-down list**, click to select the menu item whose position you wish to change.
- On the right side of the **Options** window, click on the **Move** button labeled with the up-facing arrow to move the item one position higher in the menu.
- Click on the **Move** button labeled with the up-facing arrow, as needed, to move the item higher in the menu.



To display an item in a position closer to the bottom of the menu:

- In the box labeled **Items in drop-down list**, click to select the menu item whose position you wish to change.
- On the right side of the **Options** window, click on the **Move** button labeled with the down-facing arrow to move the item one position lower in the menu.
- Click on the **Move** button labeled with the down-facing arrow, as needed, to move the item lower in the menu.
- Click on the button labeled **Ok** to finalize the order your drop down menu.

Tip: When a user opens your form document, each drop-down menu will display the first item in its drop-down list. This may be confusing for your users. To avoid this problem, add the text “**Choose one...**” as the first item in each menu.

Making your form easy to use

Once you’ve added form elements to your Word document, you will need to add instructions to your form so that its users can easily enter information according to your guidelines.

Adding instructions to the design of your form

The simplest way to add instructions to your form is to include the text of these instructions in the form’s design. You can draft instructions, and include them:

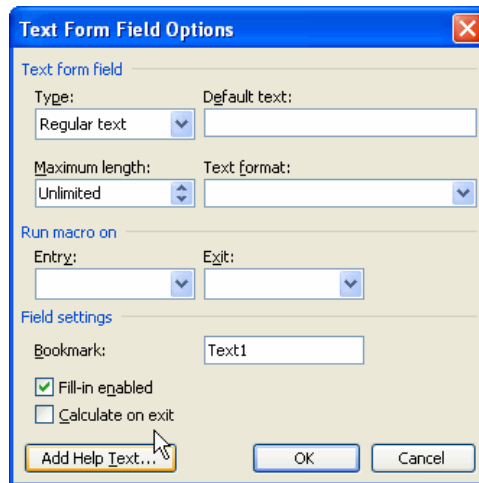
- At the top of the form, just above the area where your users will enter their information.
- As part of each section of the form

Tip: Be sure to write instructions that are clear. Also, consider providing the users of your form with a step by step process for completing the form correctly.

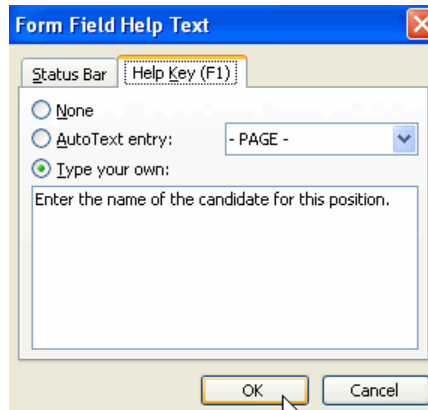
Adding instructions to a form element

In addition to clear instructions in the layout of your form, you can also add short instructions to each form element. These instructions will pop up in a separate window when a form user presses the **F1** key on his or her keyboard after clicking on a form element. To add instructions to a form element:

- Double-click on the form field you wish to add instructions to.
- The **Options** window will appear.
- In the lower left corner of the **Options** window, click on the button labeled **Add Help Text**.



- In the **Form Field Help Text** window that appears, click on the tab labeled **Help Key (F1)**.
- Click on the option button labeled **Type your own**.
- In the box beneath the option button labeled **Type your own**, type the text of your instructions.
- Click on the button labeled **Ok** to save the instructions.



- Click on the button labeled **Ok** to close the **Options** window.

Testing your form

Once you have added form elements to your form, you should test the form to make sure that it works the way you intended it to work.

Protecting your form

Before testing your form, you will want to temporarily protect your form to prevent changes to any part of the form except the form elements so that you can use the form the way your users will. To protect your form:

- From the **Forms** toolbar, click on the button labeled **Protect Form**.



Entering your information

- Enter information in the form elements you created. Make sure that you enter the most common responses in each field, so that you can preview the experience that your users will have.
- To remove all information from your form fields after each test:
 - From the **Forms** toolbar, click on the button labeled **Reset Form Fields**.



Un-protecting your document

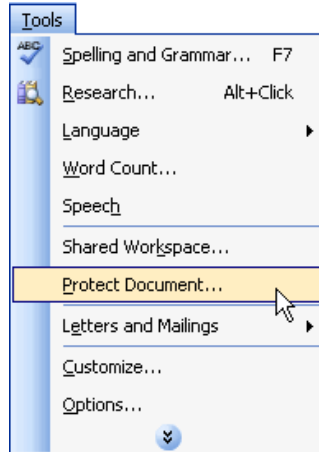
When you have finished your testing, you will want to remove the temporary protection. To remove the temporary protection:

- Click on the button labeled **Protect Form**.

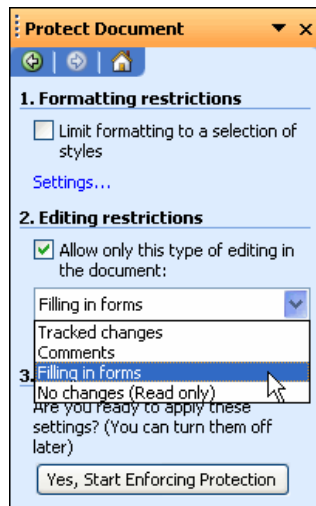
Protecting your form

Once you've tested your form, you will need to protect the form so that your users will not be able to change its layout.

- From the **Tools** menu, select **Protect Document**.



- From the **Protect Document** window that appears, click to place a check mark in the box labeled **Allow only this type of editing in the document**.
- Click on the down facing arrow below the box labeled **Allow only this type of editing in the document** and select **Filling in Forms**.
- Click on the button labeled **Yes, Start Enforcing Protection**.



- The **Start Enforcing Protection** window will appear.
- Click on the option button labeled **Password**.
- Click in the box labeled **Enter new password** and type the password you wish to use to prevent your users from removing the form's protection.
- In the box labeled **Reenter password to confirm**, retype the password you wish to use.
- Click on the button labeled **Ok** to start enforcing the protection.



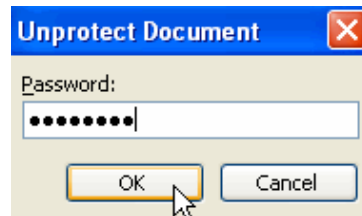
Tips: Setting passwords

- *Setting a password prevents users of your form from removing its protection and changing its design.*
- *Choose a password that will be easy for you to remember, but hard for someone outside your department to guess. For example, don't use the name of your department as the password!*
- *Set a single password for all of your protected Word forms, or one password for each group of related forms. This practice will keep your forms secure but will make it easier for you to remember the passwords you set.*

Removing protection from your form

If you need to revise your form after you have protected it, you will need to first remove the form's protection before you can make any changes. To remove protection from your form:

- From the **Tools** menu, select **Unprotect Document**.
- The **Unprotect Document** window will appear.
- Click in the box labeled **Password** and type the password for your form.
- Click on the button labeled **Ok** to remove protection from your form.



Tip: Test your form with actual form users

Once you distribute your form, there are often logistical factors that make it hard to release a revised version of the form. Before you distribute your form, ask some actual users of the form to try it out and provide you with feedback. Those additional comments will probably help you make the form much easier to use.

Distributing your form

Once you have finished your form and protected it, you are ready to distribute your form to the people who will use it. Here are some good ways to make your form widely available:

- Send an announcement via email to the people who will use the new form. Offer to email the new form to anyone who requests it.
- Save the form as a Word template on your department's network drive (or Q drive) so you're your colleagues can open it, make a copy, and fill out the form. Be sure to tell people where they should save completed versions of the form.
- Post the form on your website so that users can download it. On the download page, be sure to specify the email address to which users can send the completed form.