

Word 2007: 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 2007 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.

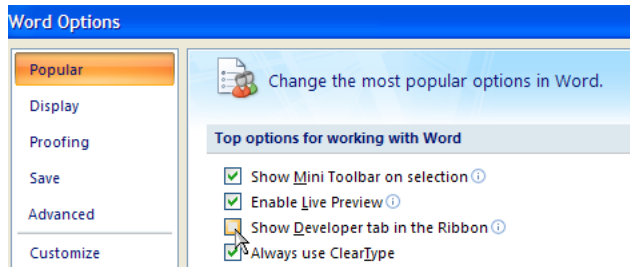
Getting started

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. To insert these elements, we need to first add the **Developer Ribbon**.

Adding the Developer Ribbon



- Click on the  button. At the bottom of this menu, click on **Word Options**.
- From the **Word Options** menu, click on **Popular**.



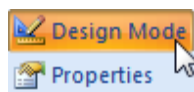
- Place a check mark next to “Show Developer tab in the Ribbon”
- Click **OK** to save these changes.

Adding form elements to your document

Once the Developer ribbon is available, you can add form elements to your document. There are three basic kinds of form fields you need to know:


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.

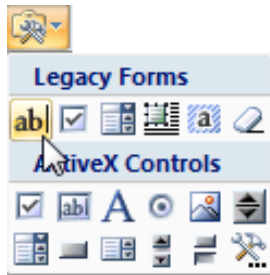
To perform any actions involving these elements, you must be in **Design Mode**. To begin working with these elements, go to the **Developer** ribbon and from the **Controls** tab click on **Design Mode**. This button will remain highlighted orange while you are in **Design Mode**.



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.
- From the **Developer** ribbon, go to the **Controls** tab and click on the **Legacy Forms** button . From the resulting menu, click on the **Text Field** button.



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

Name of candidate:  *Text field*

Tips:

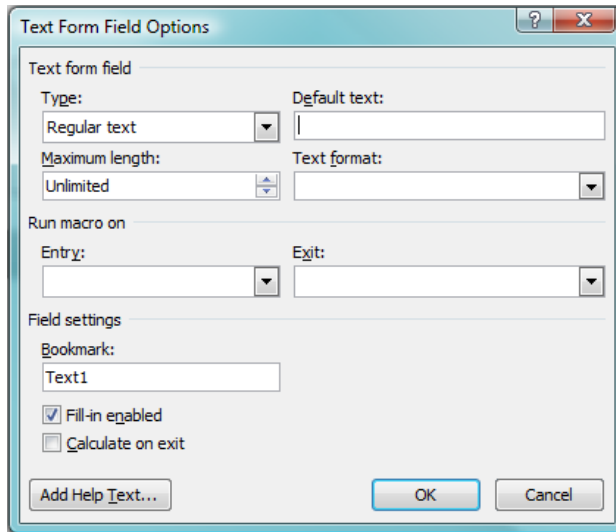
- *If your form currently provides underlined areas for users to enter their responses, be sure to remove all of the underlining from each area before inserting your form fields.*
- *You can format the contents of a text field just like you can format any other text in a Word document:*
- *Drag the cursor 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.*



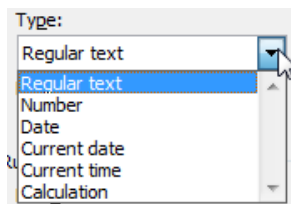
Customizing a text field

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.



- 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.

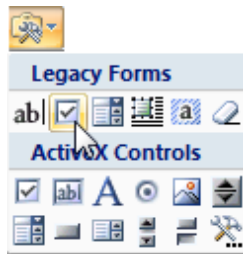
- To specify the format for the contents of your text field:
- Click on the down-facing arrow next to the box labeled **Text Format**. *If you have chosen the **Number** or **Date** format, this box may be labeled as **Number Format** or **Date Format**.*
- Click on the button labeled **OK** to apply 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 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

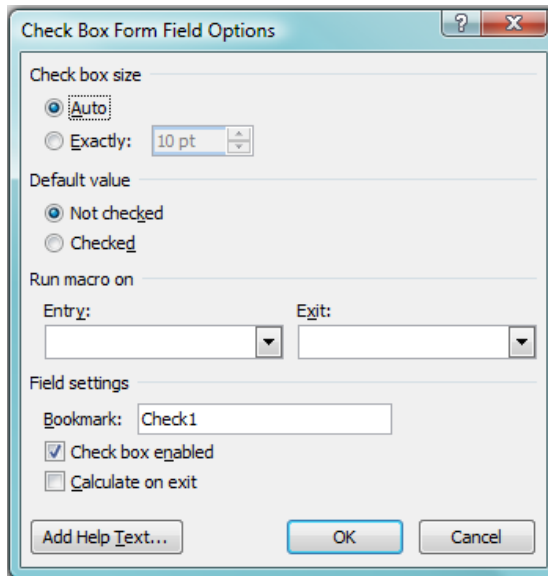
- Click to place the insertion point at the location in your document where you wish to insert your check box.
- From the **Developer** ribbon, go to the **Controls** tab and click on the **Legacy Forms** button . From the resulting menu click on the **Check Box** button



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

Customizing a check box

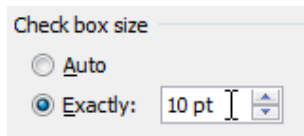
- Double-click on a check box you inserted.
- The **Check Box Form Field Options** window will appear.



Specifying the size of your Box

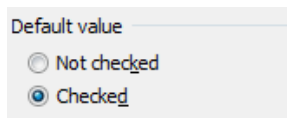
When you create your checkbox, Word will assign an automatic size for the box based upon the size of the text in your form. To specify the size of your box:

- 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 Form Field Options** window, locate the **Default Value** area.
- Click on the option button labeled **Checked**.

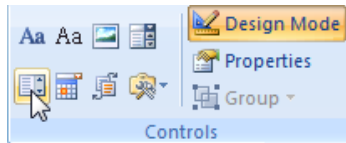


- Click on the button labeled **OK** to apply the options you selected to your check box.

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.
- From the **Developer** ribbon, go to the **Controls** tab and click on the **Drop-Down Menu** button.

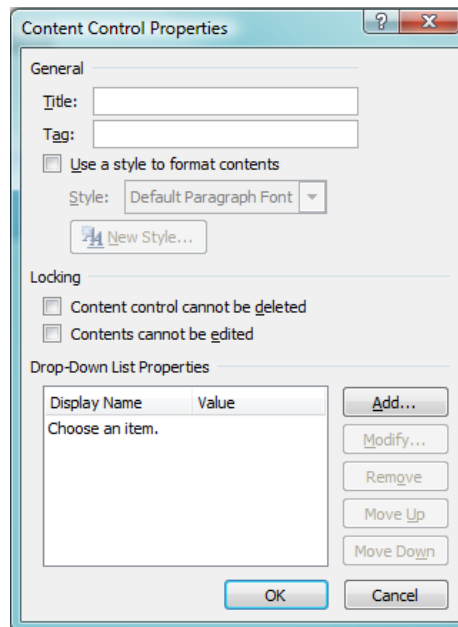


- Word will insert a drop-down menu to the left of your insertion point.

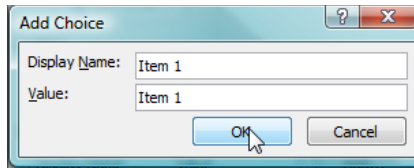
Adding items to a drop-down menu

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.

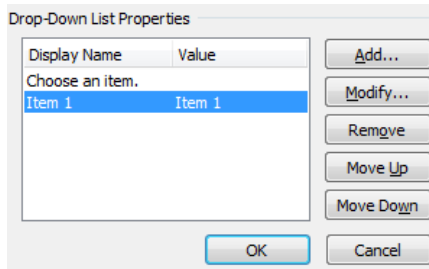
- Highlight the drop-down menu you inserted and from the **Controls** tab click on **Properties**.
- The **Drop-Down Form Field Options** window will appear.



- Click on **Add...** in the box labeled **Drop-down List Properties** and type the first item to be displayed in your menu.



- Click OK to add this item to the drop-down list.



- Repeat these steps to add additional menu items.

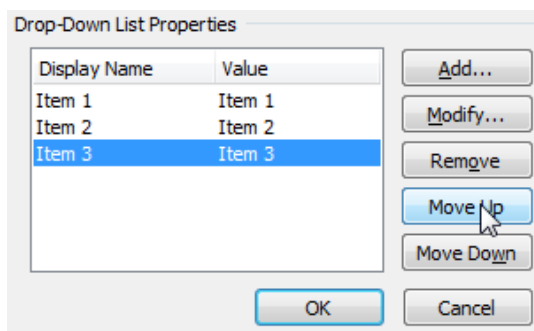
Tip: When a user opens your form document, each drop-down menu will display the first item in its drop-down list. This may be confusing for your users. To avoid this problem, Word automatically places the default item “Choose an item.” as the first item in your list.

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 **Drop-Down List Properties**, click to select the menu item whose position you wish to change.
- On the right side of this region, click on the **Move Up** or **Move Down** button to move your item accordingly.



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:

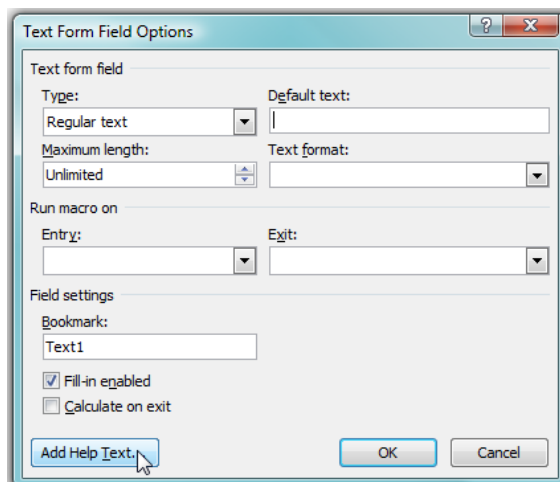
- At the top of the form, just above the area where your users will enter their information.
- As part of each section of the form

***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.*

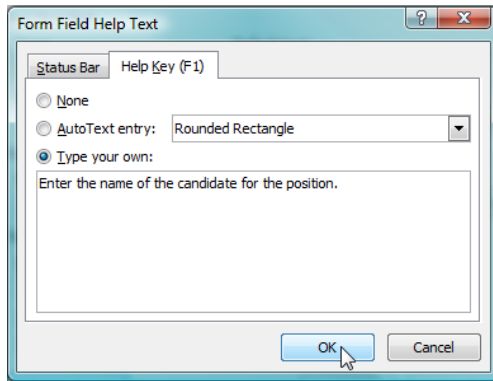
Adding instructions to a form element

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.



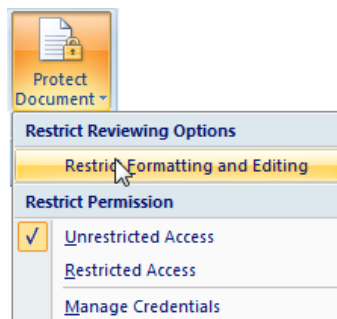
- Click on the button labeled **OK** to close the **Options** window.

Testing your document

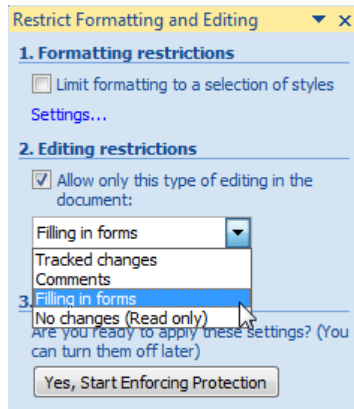
Once you have added form elements to your form, you should test the form to make sure that it works the way you intended it to work.

Protecting your document

- Before testing your forms, you will want to temporarily protect your document to prevent changes to any part of the document except the form elements so that you can use the form the way your users will. To protect your form:
 - Make sure the **Developer** ribbon is open.
 - Exit **Design Mode** by clicking on the **Design Mode** button in the **Controls** tab.
 - From the **Protect** tab, click on the **Protect Document** button and from the resulting menu click on **Restrict Formatting and Editing**.



- The **Restrict Formatting and Editing** taskpane will appear on the right side of the form



- Click on the checkbox next to “Allow only this type of editing in the document:”
- From the drop-down menu, select “Filling in forms” to ensure that users can only fill in your forms.
- Click on the **Yes, Start Enforcing Protection** button to begin protecting your forms.
- The **Start Enforcing Protection** window will appear. If you are simply testing the forms of your document, there is no need to apply a password yet, so click **OK** to continue.

Testing your forms

- Now that your document is protected, you can enter information into your forms to test how they work. Once you are satisfied with your forms, they must be reset for your users. To do this, the document must be unprotected

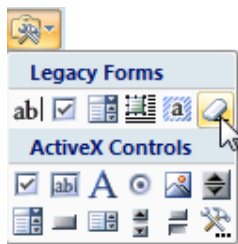
Unprotecting your document

- If the **Restrict Formatting and Editing** pane is not visible on the right side of your document, go to the **Protect** tab, click on the **Protect Document** button, and then click on **Restrict Formatting and Editing** to show the pane
- Click on **Stop Protection** to unprotect your document.

Resetting your forms

Now that the document is unprotected, you can reset the forms to allow users to fill them in. To reset all forms:

- From the **Controls** tab, click on the **Legacy Tools** button, and from the resulting submenu click on the **Reset** button

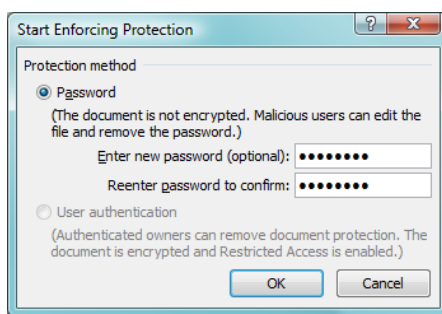


The forms will reset and you are now ready to protect your document.

Using a password to protect your document

Now that the forms are finalized, you have the option of protecting the document using a password. After clicking on the **Yes, Start Enforcing Protection** button, you should see the **Start Enforcing Protection** window.

- Enter a password in the “Enter new password” field, making sure to reenter the password in the field below.



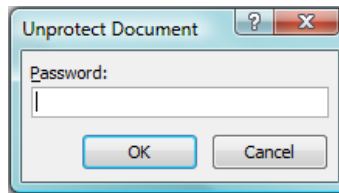
Tips: Setting passwords

- *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:

- Click on the **Protect Document** button and click on **Restrict Formatting and Editing** to bring up the “Restrict Formatting and Editing” pane.
- On the bottom of the pane, click on **Stop Protection**
- If you used a password to protect your document, you will be prompted to enter that password before you can unprotect the document.



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.