

## Word 2008 for Mac: Forms Learning Guide

### Why Use Word Forms?

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

Word 2008 helps eliminate these problems by allowing you to add form elements – text boxes, checkboxes, and drop-down menus – to forms you have already designed so they can easily be used without the need for any format changes. Once you have inserted these elements, 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 is easy for everyone to use and highly readable for you.

### Getting Started

After you have designed your form in Word, you can insert form elements that will allow users 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.   |

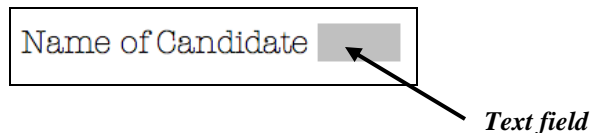
## Adding a Text Field to your Document

### Creating a Text Field

- Click to place your cursor at the location in your document where you would 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.



### ***Tips: Adding Shading to Your Text Field***

- *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 your cursor across a field to select it.*
  - *Hold down the **Ctrl** key and click on the field.*
  - *From the drop-down menu that appears, select 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.*

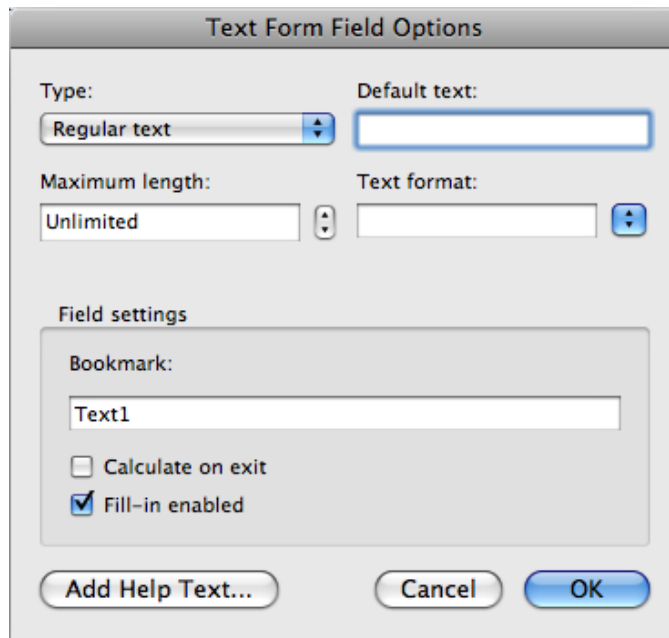
- To easily identify your text field within your form, shade it gray by clicking on the **Form Field Shading** button.



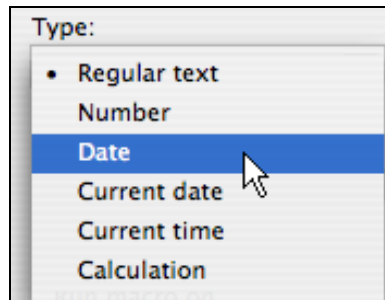
### Customizing a Text Field

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

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



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



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

| To automatically insert....    | Select....   |
|--------------------------------|--------------|
| 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:
  - In the box labeled **Default text**, type the default value you wish to use.
- To specify the maximum number of characters that can be entered in your text field:
  - In the box labeled **Maximum Length**, type the maximum value.
- To specify the format for the contents of your text field:
  - Click on the down-facing arrow located 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

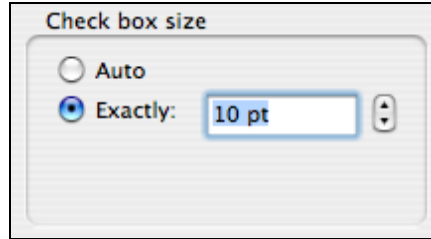
- Double-click on the check box you inserted.
- The **Check Box Form Field Options** window will appear.

The screenshot shows the 'Check Box Form Field Options' dialog box. It is divided into three sections: 'Check box size', 'Default value', and 'Field settings'. In the 'Check box size' section, the 'Auto' radio button is selected, and the 'Exactly' option is set to '10 pt'. In the 'Default value' section, the 'Not checked' radio button is selected. In the 'Field settings' section, the 'Bookmark' field contains 'Check1', the 'Calculate on exit' checkbox is unchecked, and the 'Check box enabled' checkbox is checked. At the bottom of the dialog, there are three buttons: 'Add Help Text...', 'Cancel', and 'OK'.

### *Specifying the Size of Your Box*

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

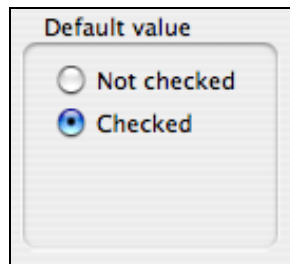
- On the **Check Box Form Field Options** window, locate the **Check box size** area.
- Click on the option button labeled **Exactly**.
- In the box next to the **Exactly** option button, enter the size (in points) for your checkbox.



### *To Place a Check Mark by Default*

In many cases, you may wish to specify that your new checkbox 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 your cursor 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.

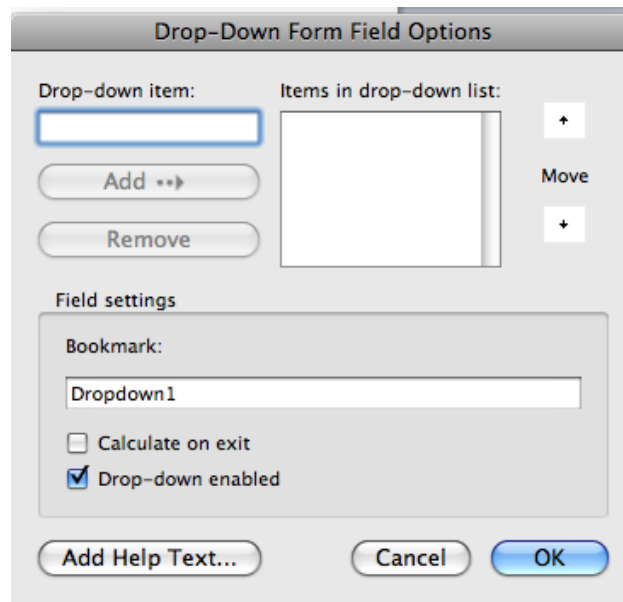


- Word will insert a drop-down menu to the left of your insertion point.

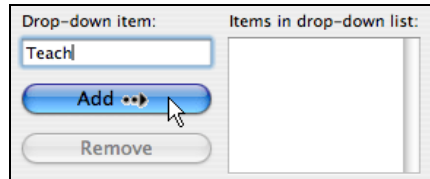
### Adding Items to a Drop-Down Menu

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

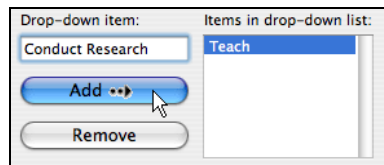
- Double-click on the drop-down menu you inserted.
- The **Drop-Down Form Field Options** window will appear.

The screenshot shows a dialog box titled "Drop-Down Form Field Options". It is divided into two main sections. The top section, "Drop-down item:", contains a text input field with a blue border, an "Add >>" button, and a "Remove" button. The right side of this section has "Items in drop-down list:" with an empty list box, a "+" button, a "Move" button, and another "+" button. The bottom section, "Field settings", contains a "Bookmark:" label, a text input field with "Dropdown1" entered, a "Calculate on exit" checkbox (unchecked), and a "Drop-down enabled" checkbox (checked). At the bottom of the dialog are "Add Help Text...", "Cancel", and "OK" buttons.

- In the box labeled **Drop-down item**, type the first item you wish to display in your menu.
- Click on the button labeled **Add**.
- The first menu item will be moved into the box labeled **Items in drop-down list**.



- In the box labeled **Drop-down item**, type the second item you wish to display 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 for each additional menu item you wish to add.

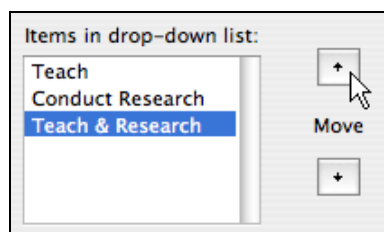


### Reordering Items in a Drop-Down Menu

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

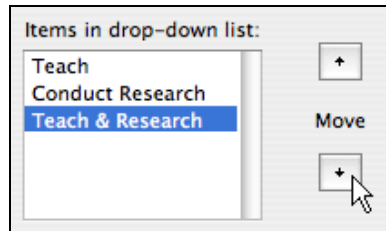
#### *To Display a Menu Item in Higher in the Item List*

- In the box labeled **Items in drop-down list**, click to select the menu item whose position you wish to change.
- Click on the **Move** button labeled with the upward-facing arrow to move the item one position higher in the menu.
- Repeat these steps until the item is in its desired location.



*To Display an Item in a Lower Position on the Item List*

- In the box labeled **Items in drop-down list**, click to select the menu item whose position you wish to change.
- Click on the **Move** button labeled with the down-facing arrow to move the item one position lower in the menu.
- Repeat these steps until the item is in its desired location.



- Click on the button labeled **OK** to finalize the order of your drop-down menu.

***Tip:** When a user opens up 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 have 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 Your Form’s Design

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:

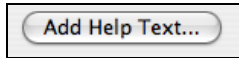
- At the top of the form, just above the area where your users will enter their information.
- As part of each section of the form

***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.*

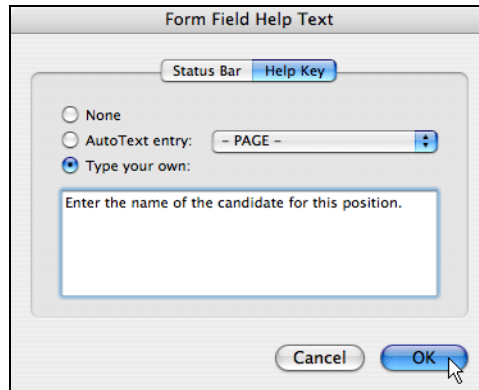
## Adding Instructions to a Form Element

In addition to clear instructions in the layout of your form, you can also add short instructions to each form element that will pop up in a separate window when a form user presses the **F1** key 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 **Form 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**.
- Click on the option button labeled **Type your own**.
- In the box beneath the option button labeled, type the text of your instructions.
- Click on the button labeled **OK** to save the instructions.



- Click on the button labeled **OK** t.

## Testing Your Form

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

### Temporarily Protecting Your Form

Before testing your form, you will want to temporarily protect it so you can use it as your users will. To protect your form from changes except to form elements:

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



### Entering Your Information

- Enter information in the form elements you created. Make sure 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 testing, you will want to remove the temporary protection. To remove temporary protection:

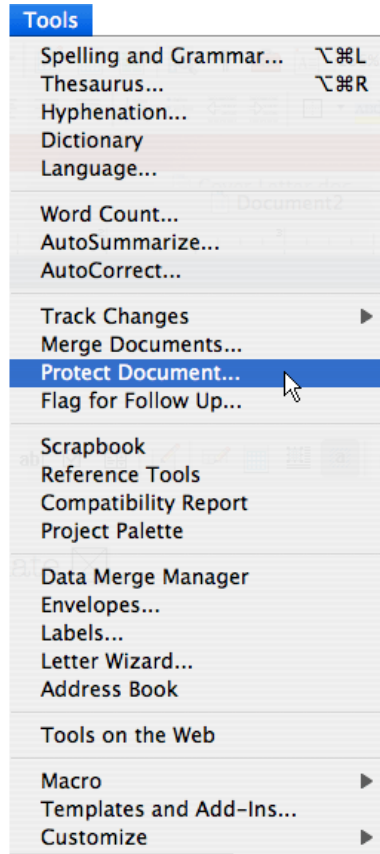
- Click on the button labeled **Protect Form**.



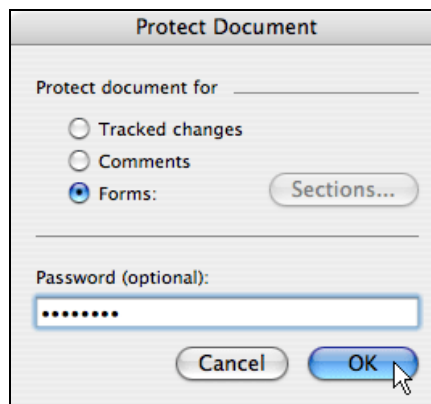
## Protecting Your Form

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

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



- The **Protect Document** window will appear.
- In the **Protect Document** area, click on the option button labeled **Forms**.



- In the box labeled **Password (optional)**, type the password you wish to use to prevent your users from removing the form's protection.
- Click on the button labeled **OK**.
- The **Confirm Password** window will appear.
- In the box labeled **Reenter password to open**, retype the password for your form.



- Click on the button labeled **OK**.

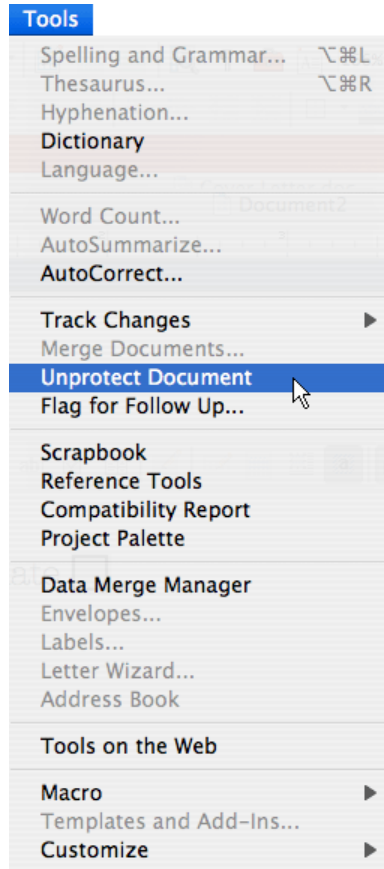
***Tips: Setting Passwords***

- *Setting a password prevents users of your form from removing its protection and changing its design.*
- *Select a password that will be easy for you to remember, but hard for someone outside your department to guess. For example, do not 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.*

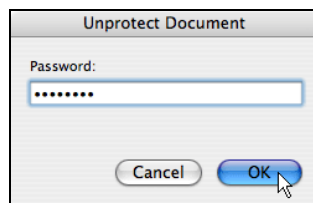
## Removing Protection from Your Form

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.
- In the box labeled **Password**, type the password for your form.
- Click on the button labeled **OK** to remove protection from your form.



***Tip: Testing Your Form with Actual 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 to complete the form and provide you with. Those additional comments will probably help you make the form much easier to use.*

## Distributing Your Form

Once you have completed 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 or 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.