



Introduction

Forms are used to insert information in designated fields repeatedly in a template format. For example, you may create a form for Phone Inquiries in a Real Estate Office or for Work Orders in a Plumbing Company. Forms prompt the user for information, without disturbing the template. This self-help document will step you through how to create a variety of different form fields including text, number, check box, drop down and more.

Process Summary

- Introduction**
- Inserting a Table to hold Form Fields**
- Displaying the Developer Tab**
- Inserting Fields into a Form**
- Adding Help Text**
- Protecting a Form**
- Saving a Form as a Template**

Inserting a Table to Hold Form Fields

Tables are commonly used in forms because the text stays aligned. It is also easy to create labels for the fields in a table.

1. Click the **Insert** tab on the Ribbon (Fig 1, 1).
2. In the **Tables** group, click the down arrow under **Table** (Fig 1, 2).
3. Click **Insert Table** (Fig 1, 3).
4. The **Insert Table** dialog box will appear (Fig 2).
5. Change the **Number of columns** and the **Number of rows** as needed (Fig 2, 1) (in this example we used 2 columns and 7 rows).
6. Click on **OK** (Fig 2, 2).

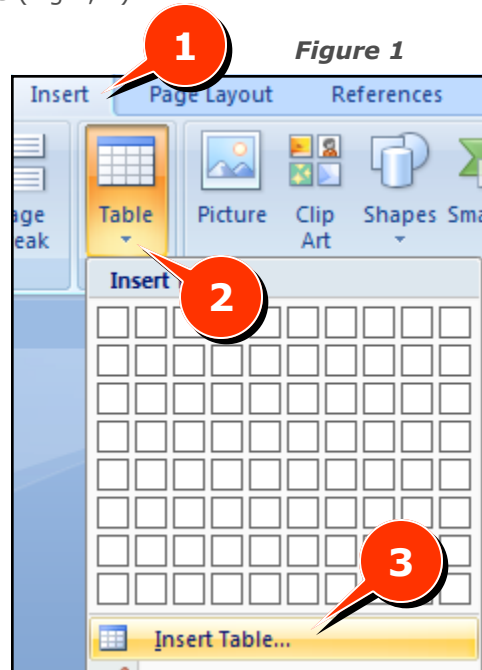


Figure 1

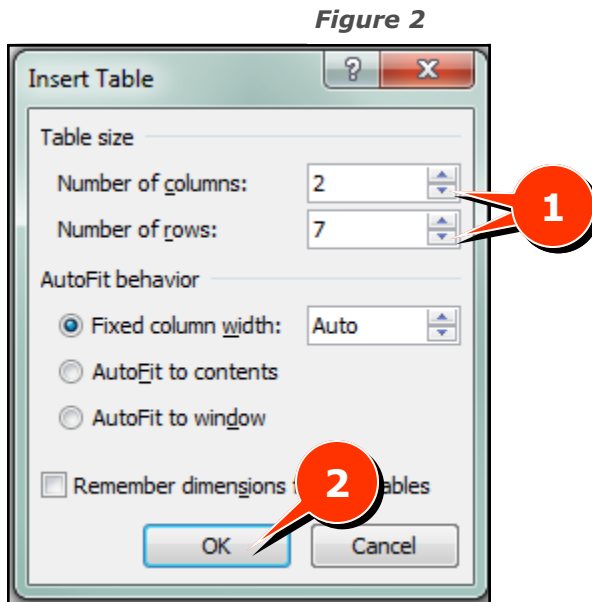


Figure 2

After creating a table, you must understand that the columns are referred to as letters and rows are numbers. Therefore, the first cell in the table is A1 and the cell to the right is B1.

Adding Field Labels to a Table

After creating the table, it is a good idea to enter the field labels. Field labels are fixed text used to identify the form field. In this example, we will be creating a Performance Evaluation Form.

1. Click in the first cell in the table (cell **A1**) and type the first label (in this example: **Employee Name:**) (Fig 3, 1).
2. Press the down arrow on your keyboard to get to cell **A2** or click in this cell and type the second label (in this example: **Employee ID#:**).
3. Continue to type all your field labels (Fig 3).
4. You may wish to go back and format your labels slightly different so they stand out from the form fields. In the example below, the labels are bold.

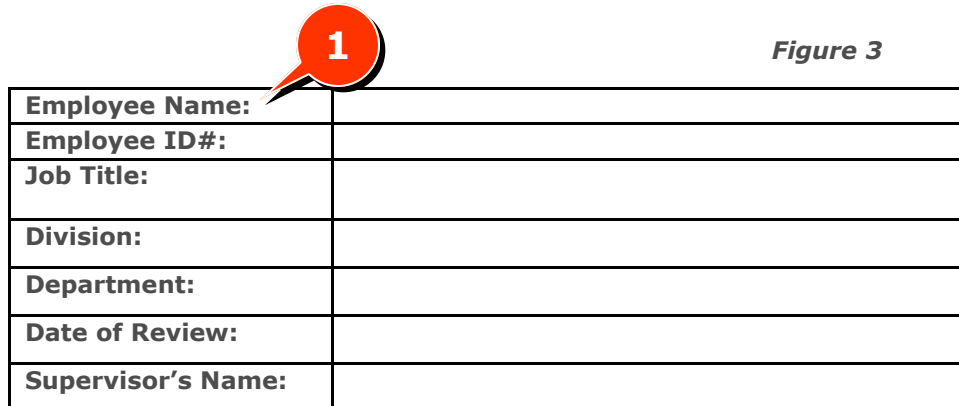


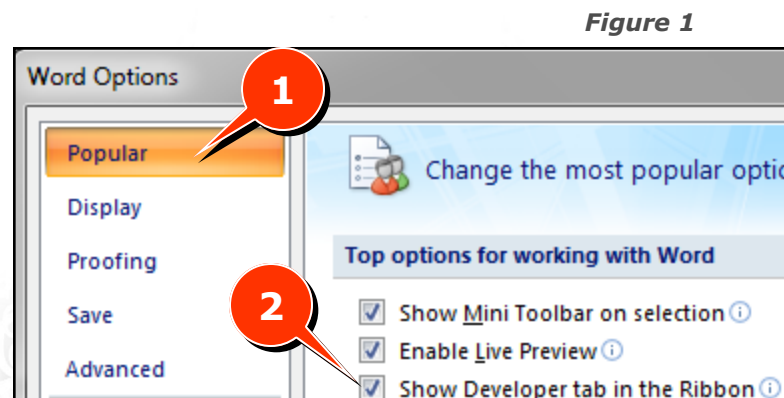
Figure 3

Employee Name:	
Employee ID#:	
Job Title:	
Division:	
Department:	
Date of Review:	
Supervisor's Name:	

Displaying the Developer Tab

In order to work with forms in Word 2007, you must add the Developer tab to the ribbon.

1. Click the **Office button**.
2. Click **Word Options** at the bottom of the menu.
3. Click **Popular** (Fig 1, 1).
4. Click **Show Developer tab in the Ribbon** (Fig 1, 2).
5. Click **OK**.



Inserting Fields into a Form

Any area in a form that you wish to accept text, numbers, dates or calculation, must be inserted as a text form field. After inserting the field type, data type must be defined.

Inserting a Text Form Field

1. Click in the blank cell beside a label in the table (Fig 1, 1).

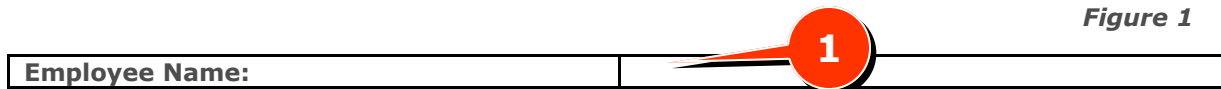


Figure 1

2. Click the **Developer** tab on the ribbon (Fig 2, 1).
3. Click the down arrow beside **Legacy Tools** in the **Controls** group (Fig 2, 2). A menu will appear.

Figure 2

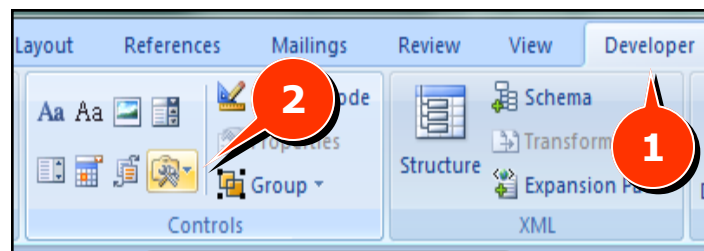


Figure 3

4. Under **Legacy Forms**, click on the **Text Form Field** icon (Fig 3, 1).
5. You will see a grey field appear in your table.
6. To change any properties of the text field, double-click directly on the text field.
7. The **Text Form Field Options** dialog box will appear (Fig 4).

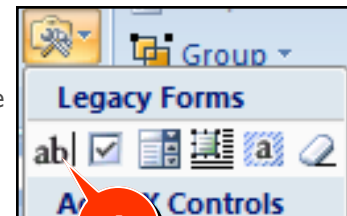
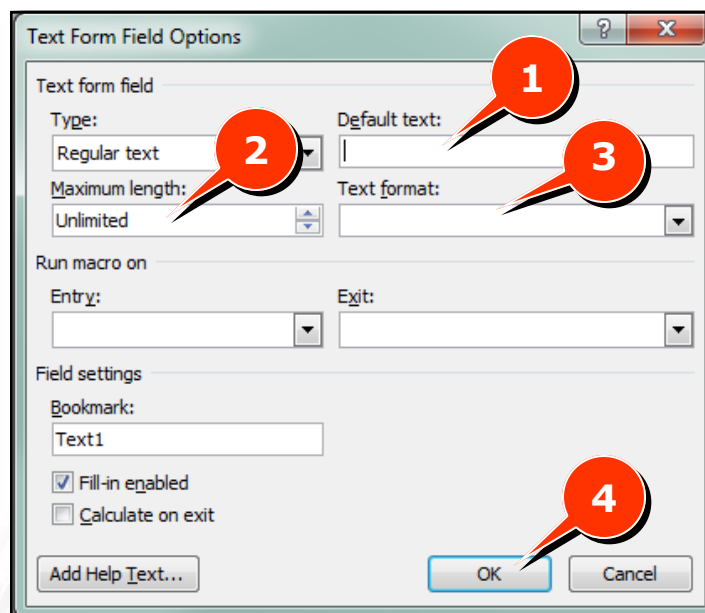


Figure 4

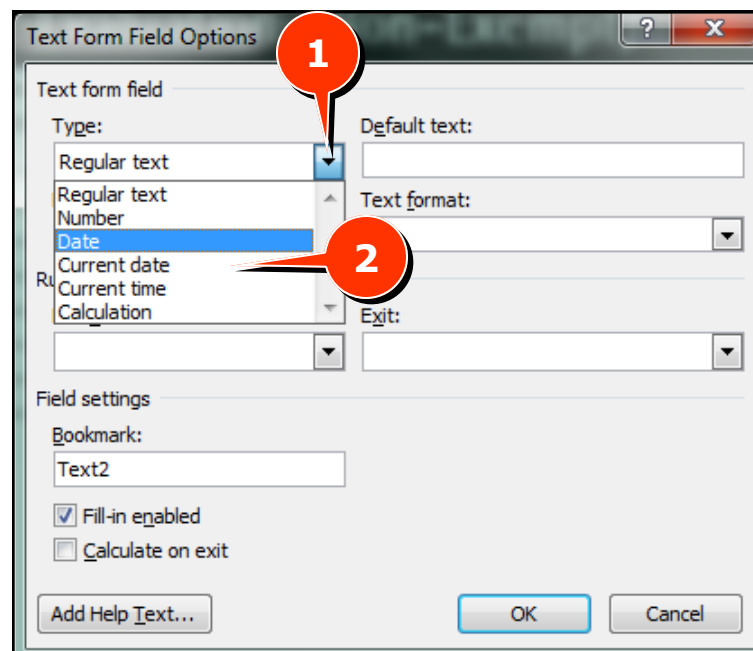


- **Default text** - Type any text you would like to appear in the field before the user enters a value (Fig 4, 1).
 - **Maximum length** - Measures the number of text characters. The default value is unlimited (Fig 4, 2).
 - **Text format** - Click on the down arrow and you may change the value to Uppercase, Lowercase, First capital or Title Case (Fig 4, 3).
8. Click **OK** when you have made all your selections (Fig 4, 4).

Inserting a Date Form Field

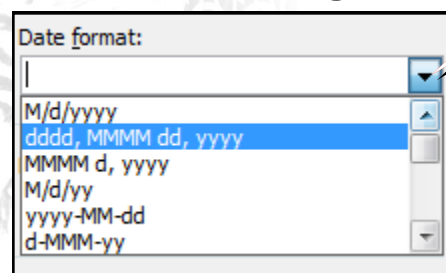
1. Click in the blank cell beside your label in the table.
2. Click the **Developer** tab on the ribbon.
3. Click the down arrow beside **Legacy Tools** in the **Controls** group. A menu will appear.
4. Under **Legacy Forms**, click on the **Text Form Field** icon.
5. You will see a grey field appear in your table.
6. Double-click directly on the text field. The **Text Form Field Options** dialog box will appear (Fig 5).
7. Click the down arrow under **Type** (Fig 5, 1). A menu will appear.
8. Choose either **Date**, **Current date** or **Current time** (Fig 5, 2).

Figure 5



9. Click the down arrow beside **Date format** (Fig 6, 1) and choose a format.
10. Click on **OK**.

Figure 6



Inserting Check Box Form Fields

Creates an on/off check box.

1. Click in the cell where you want to place the check box form field.
2. Click the **Developer** tab on the ribbon.
3. Click the down arrow beside **Legacy Tools** in the **Controls** group. A menu will appear.
4. Click on the **Check Box Form Field** icon (Fig 7, 1).

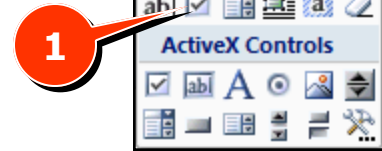


Figure 7

Creating Number Form Fields

Number form fields are usually created for fields that are used in a calculation.

1. Click in the cell where you want to place the number field.
2. Insert a **Text Form Field** (instructions may be found on page 3 of this self-help document).
3. Double-click directly on the text field. The **Text Form Field Options** dialog box will appear (Fig 8).
4. Under **Type** click on the down arrow and choose **Number** (Fig 8, 1).
5. You have the following additional options:
 - **Maximum length**- click the up and down arrows to control the number of digits (Fig 8, 2).
 - **Default number**- enter any number you wish to appear in the field before the user enters a value (Fig 8, 3).
 - **Number format**- click the down arrow and choose from a variety of formatting options (Fig 9).
7. Place a check beside **Calculate on exit** if this field will be used in a calculation or is the calculated field (Fig 8, 4).
8. Click on **OK**.

Figure 8

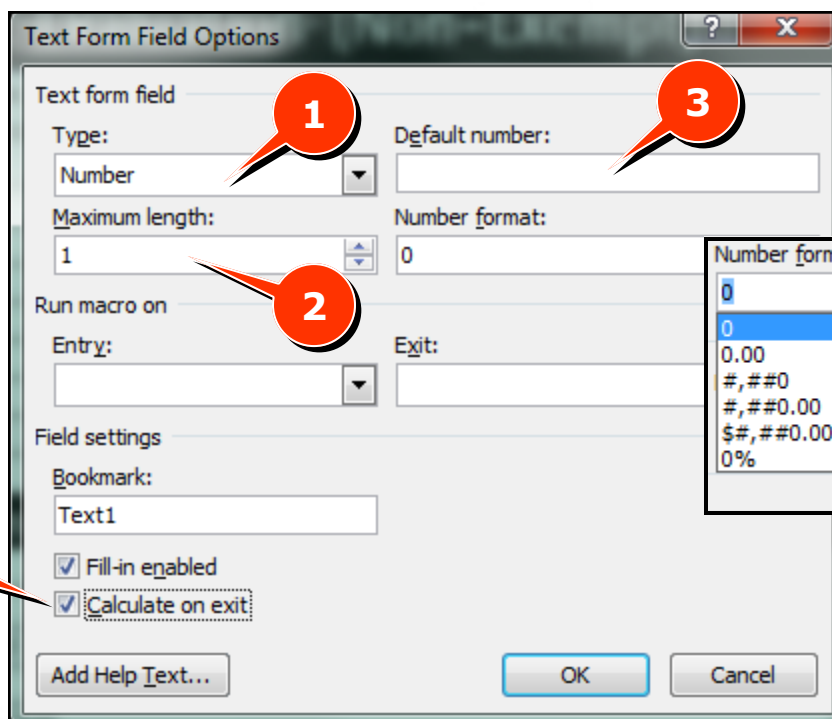
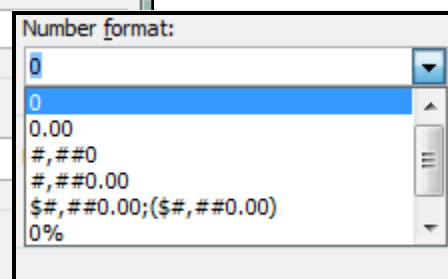


Figure 9

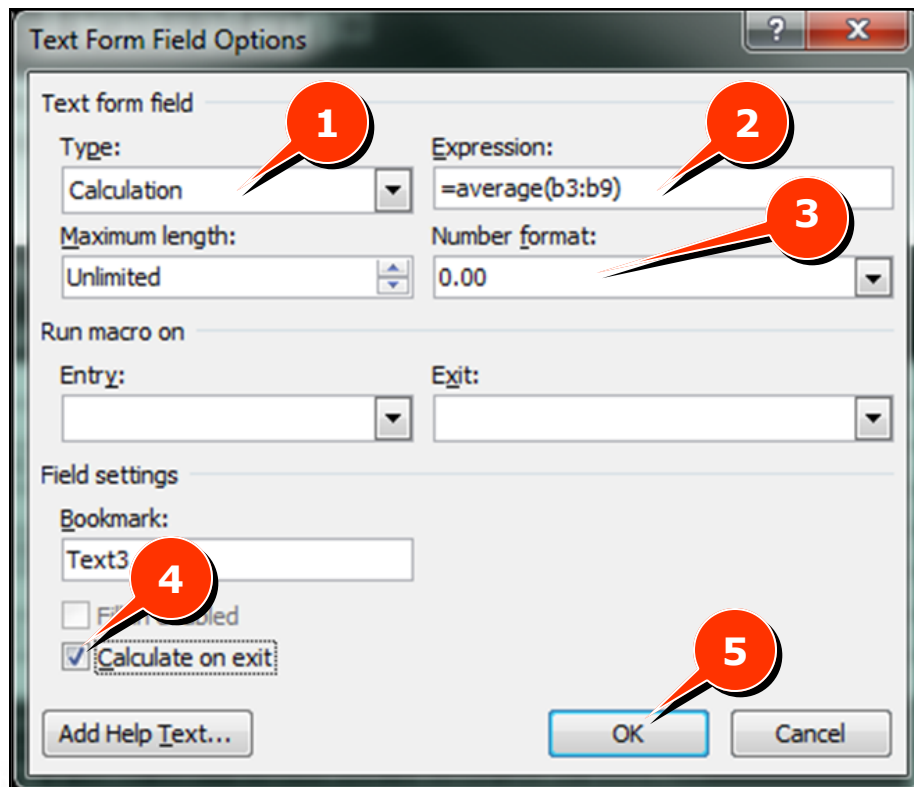


Creating Calculation Form Fields

Calculation fields are used to hold computations such as addition, subtraction, multiplication and division. In order to compute the numbers in the table, you must understand that the columns are referred to as letters and rows are numbers. Therefore, the first cell in the table is A1 and the cell to the right is B1. These are the references, which the column and row calculations are based upon. You may also use functions to create calculations followed by the direction of the cells in reference to the calculated field (ex: =sum(above)) or followed by the cell range (ex: =average(b2:b5)).

1. Click in the cell where you want to place the calculated field.
2. Insert a **Text Form Field** (instructions may be found on page 3 of this self-help document).
3. Double-click directly on the text field. The **Text Form Field Options** dialog box will appear (Fig 10).
4. Under **Type**: click on the down arrow and choose **Calculation** (Fig 10, 1).
5. Click beside the = sign which appears in the **Expression** text box (Fig 10, 2). Type in the particular calculation in the designated formula box. For example if a user has numbers in the A2 and A3 box and wants them added together, simply type "=A2+A3".
 - Basic formula symbols: For addition it is "+", for subtraction "-", for multiplication "*" and for division "/".
 - Functions may also be used: =sum(above) or = average(b2:b5).
6. Click on the down arrow under **Number Format**, choose a number format (Fig 10, 3).
7. Click beside **Calculate on exit** (Fig 10, 4).
8. Click on **OK** (Fig 10, 5).

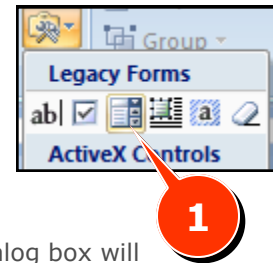
Figure 10



Creating Drop-Down Form Fields

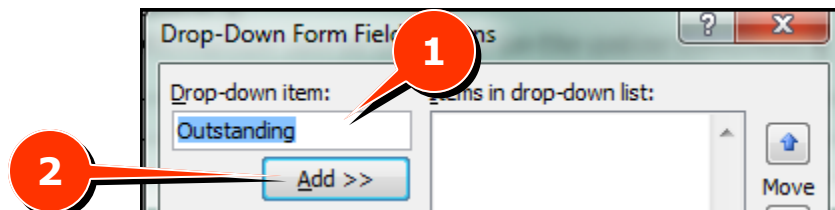
Drop-down form fields display a list containing values that you specify. Users can only select from this list of entries.

Figure 11



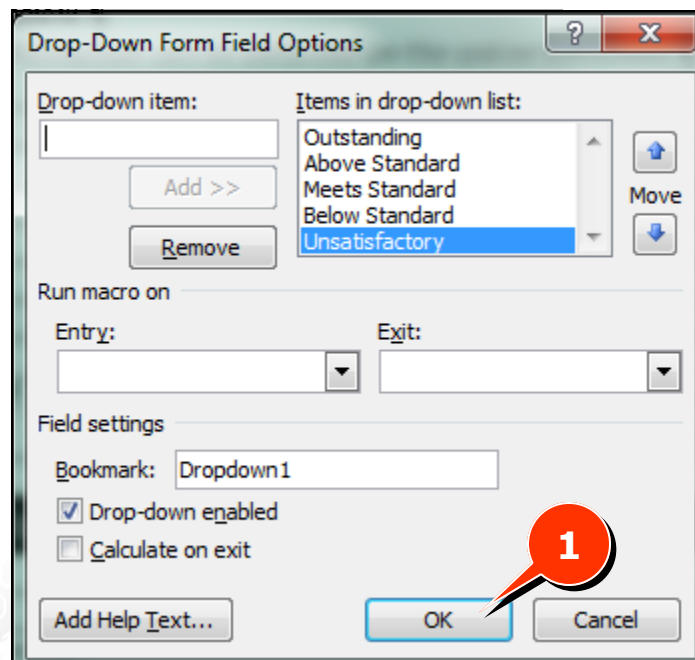
1. Click in the cell where you want to place the drop down form field.
2. Click the **Developer** tab on the ribbon.
3. Click the down arrow beside **Legacy Tools** in the **Controls** group. A menu will appear.
4. Click on the **Drop-Down Form Field** icon (Fig 11, 1).
5. Double-click directly on the field. The **Drop-Down Form Field Options** dialog box will appear (Fig 12).
6. Under **Drop-down item:** type your first entry (Fig 12, 1) and click on **Add** (Fig 12, 2).

Figure 12



7. Continue step 6 above until all items are added (Fig 13).
8. Click on **OK** (Fig 13, 1).

Figure 13



Adding Help Text

Help text tells the user what to put in the field. You may set up help text to appear in the status bar or require the user to press the F1 function key to get help. In this example, we will set up the help text to show up in the status bar.

1. Double-click on any **Form Field** (grey shaded area).
2. The **Form Field Options** dialog box will appear (Fig 1). Click on the button at the bottom of the box entitled **Add Help Text** (Fig 1, 1). The **Form Field Help Text** dialog box will appear (Fig 2).
3. Make sure you are on the **Status Bar** tab (Fig 2, 1).
4. Click in the box under **Type your own:** and type your help text (Fig 2, 2).
5. Click on **OK** (Fig 2, 3).
6. Click on **OK**.

Figure 1

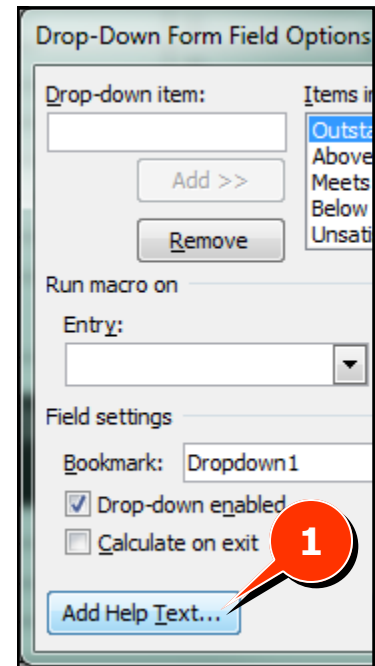
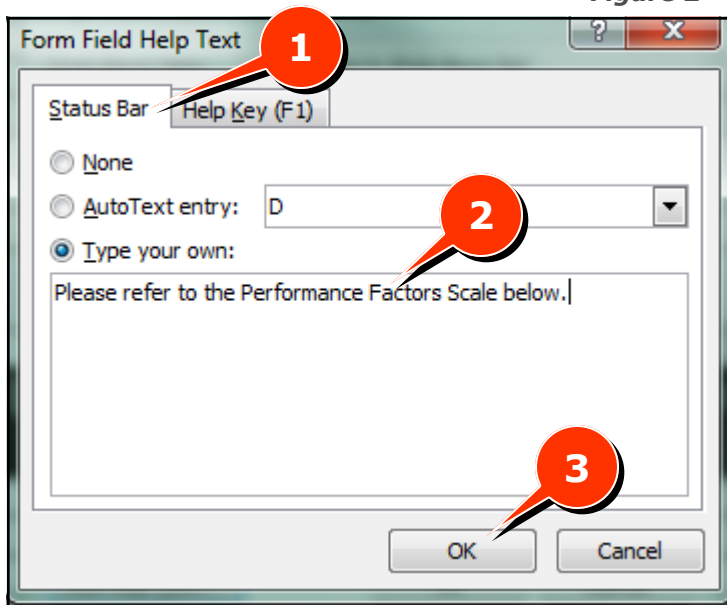


Figure 2



Protecting a Form

Before saving a form, you must protect the form. This prohibits anyone from changing the fields and it also guides the user through the fields.

1. Click the **Developer** tab on the Ribbon.
2. In the **Protect** group, click **Protect Document** (Fig 1, 1). A menu will appear.
3. Click **Restrict Formatting and Editing** (Fig 1, 2).

Figure 1

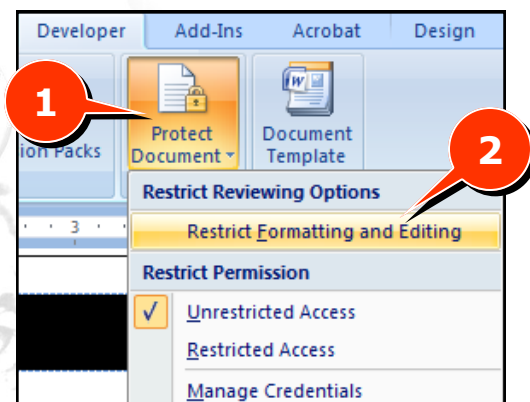
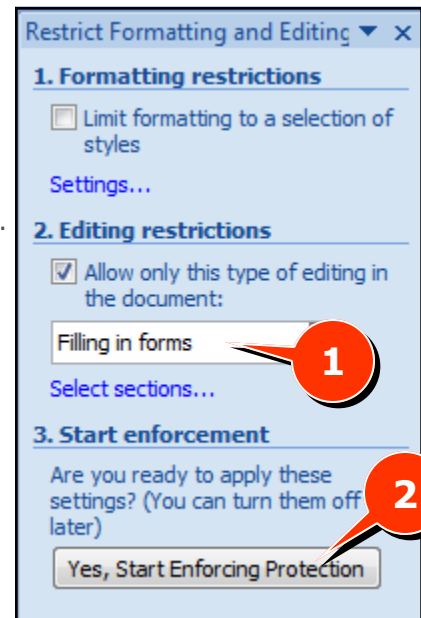
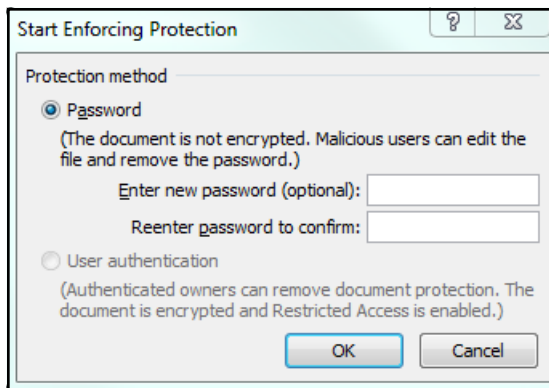


Figure 2

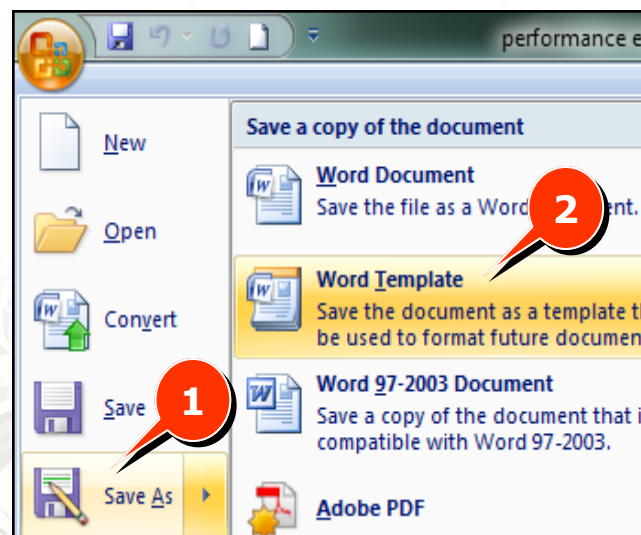
4. The **Restrict Formatting and Editing** task pane will appear on the right side of the screen (Fig 2).
5. Under **2. Editing restrictions** do the following:
 - Click beside **Allow only this type of editing in the document:** to select.
 - Click the down arrow and choose **Filling in forms** (Fig 2, 1).
6. Click **Yes, Start Enforcing Protection** (Fig 2, 2).
7. The **Start Enforcing Protection** dialog box will appear (Fig 3). Enter a password if you wish.
8. Click on **OK**.

**Figure 3**

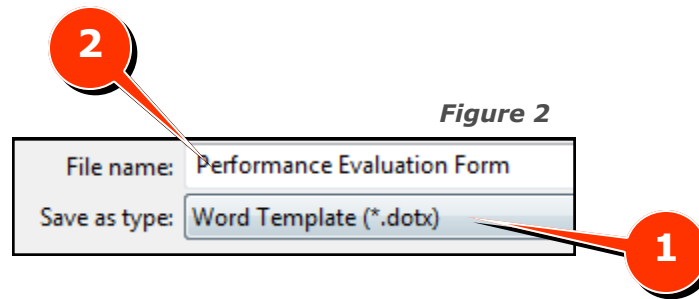
Saving a Form as a Template

After protecting a form, you will want to save the form as a template. As a template, users can create and save new documents based on the template.

1. Click the **Office Button**.
2. Point to **Save As** (Fig 1, 1) and click on **Word Template** (Fig 1, 2).

Figure 1

3. The **Save As** dialog box will appear.



4. At the bottom of the box, make sure **Word Template** is chosen beside **Save as type** (Fig 2, 1).
5. Beside **File Name**, type a name for the form (Fig 2, 2).
6. Click on **Save**.
7. Close the file.

Filling Out a Form

1. Click the **Office Button**.
2. Click **New**.
3. Click **New from existing** (Fig 1, 1).
4. Select the correct drive and directory.
5. Select the template name and click **Create New**.
6. Fill in the template, pressing the tab key to move from field to field.

Figure 1

