

Creating Electronic Forms in Microsoft Word 2003

This handout explains how to use Word to create forms that can be filled out on a computer and saved or printed. Users must have Microsoft Word in order to fill out the forms.

Word forms are best for when you:

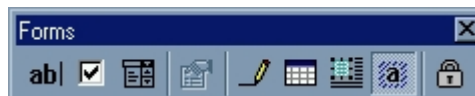
- only need to distribute the form to people who you know have Microsoft Word, either the same or a newer version than you are using to create the form
- want people to be able to print and save the form
- want the form to retain its original formatting, except for pagination (the form may get longer, depending upon how much people type in the text boxes)
- want to keep a printed copy of the form on record

Additional advantages:



- Users don't have to complete the form all at once; they can save it and finish filling it out later
- You can limit the amount of text that users can type in a field
- You can lock the document so that users can only type in the places you specify
- You can control the formatting of numeric input (date, decimal, etc.) and text input (font, size, etc.)
- To some extent, you can create spreadsheet-like calculated (numeric) fields

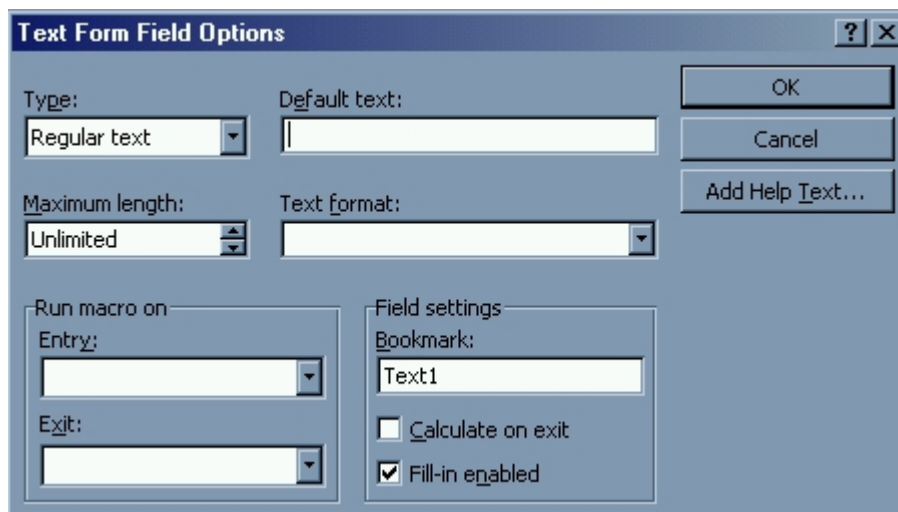
Creating the Form

1. Start by creating the form, leaving room for the fields that users will fill in. Enter and format your prompts/questions, such as "Name:". You may wish to use a table for the form layout, to easily align the fields.
2. To add the form fields, you will need to display the Forms toolbar. Go to View ► Toolbars ► Forms. The Forms toolbar will appear as a floating palette, which you may move anywhere on your screen.




Text fields


1. Click in the location where you want the text box (a place for the user to type text).
2. Click the  button on the Forms toolbar and a plain grey box will appear.
3. To format the box, double-click on it.
4. (Optional) In the Default text box, type the text you want users to see as a prompt, like:
[Click here and type comments]
5. To set a maximum length of text that the user can type in this field, click in the Maximum length box and type a number of characters.
6. To format the case of the text that the user will enter, click on the Text format box and choose an option.
7. When finished setting the Text Form Field Options, click OK.
8. (Optional) To format the prompt text (font, size, bold, etc.), click once on the field to highlight it, then format the text as you normally would, e.g. **[Click here and type comments]**.
9. (Optional) To turn off the grey shading around the fields, click the  button on the Forms toolbar. This will turn the field shading off for the entire form (not just for the current field).






Date fields

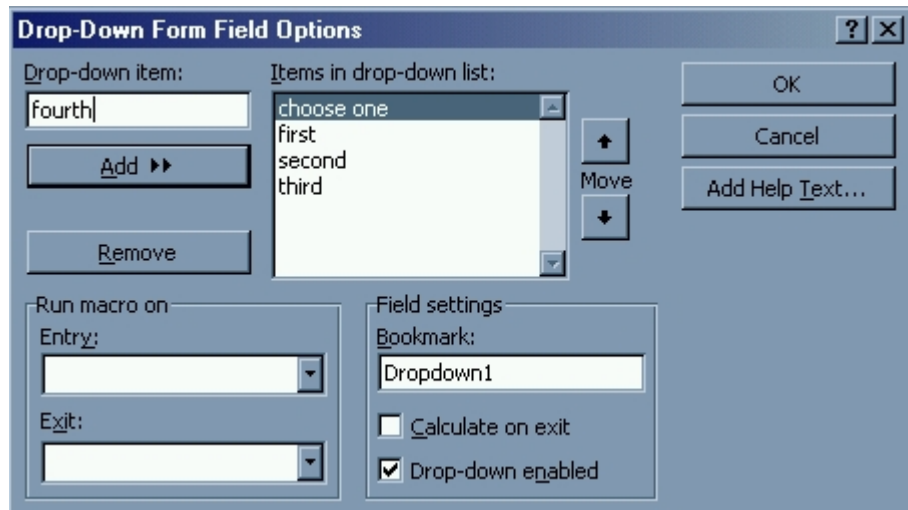
1. Click in the location where you want the date box, then click the  button on the Forms toolbar.
2. To format the box, double-click on it.
3. Change the Type box from “Regular text” to “Date” (if you want the user to fill in the date) or “Current Date” (if you want the current date automatically filled in each time the form is used).
4. (Optional) If you choose a date format from the “Date format” box, the user’s input will be converted to that format, regardless of how they entered the date.
5. Click OK.

Number fields

1. Click in the location where you want the number box, then click the  button on the Forms toolbar.
2. To format the box, double-click on it.
3. Change the Type box from “Regular text” to “Number.”
4. Choose the number format from the “Number format” box.
5. Click OK.

Drop-down lists


1. Click in the location where you want the list, then click the  button on the Forms toolbar.
2. To format the list field, double-click on it.
3. Type each list entry in the Drop-down item box, then click the Add button to make it appear in the list. You’ll probably want your first entry to be your prompt text, such as “Choose one:”.
4. To remove an entry from the list, click on it in the Items in drop-down list box, and click the Remove button.
5. To change the order of the items in the list, use the  and  buttons.
6. Click OK.

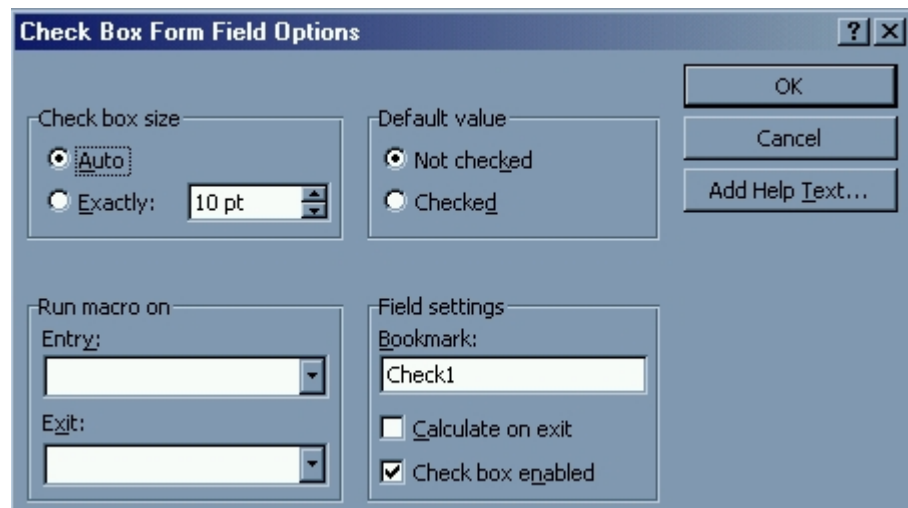


The screenshot shows the "Drop-Down Form Field Options" dialog box. It has a title bar with a question mark and a close button. The dialog is divided into several sections:

- Drop-down item:** A text box containing "fourth". Below it are "Add" and "Remove" buttons.
- Items in drop-down list:** A list box containing "choose one", "first", "second", and "third". To its right are "Move" buttons (up and down arrows).
- Run macro on:** Two dropdown menus labeled "Entry:" and "Exit:".
- Field settings:** A "Bookmark:" text box containing "Dropdown1", a "Calculate on exit" checkbox (unchecked), and a "Drop-down enabled" checkbox (checked).
- Buttons:** "OK", "Cancel", and "Add Help Text..." buttons on the right side.

Check boxes

1. Click in the location where you want the check box, then click the  button on the Forms toolbar.
2. To format the check box, double-click on it.
3. (Optional) To change the size of the check box, choose Exactly and enter a size (in points, just like font sizes).
4. (Optional) If you want the check box to be checked by default, choose Checked.
5. Click OK.



The screenshot shows the "Check Box Form Field Options" dialog box. It has a title bar with a question mark and a close button. The dialog is divided into several sections:

- Check box size:** Radio buttons for "Auto" (selected) and "Exactly:" with a text box containing "10 pt".
- Default value:** Radio buttons for "Not checked" (selected) and "Checked".
- Run macro on:** Two dropdown menus labeled "Entry:" and "Exit:".
- Field settings:** A "Bookmark:" text box containing "Check1", a "Calculate on exit" checkbox (unchecked), and a "Check box enabled" checkbox (checked).
- Buttons:** "OK", "Cancel", and "Add Help Text..." buttons on the right side.


Creating Calculated Number Fields

The easiest way to create a field that is automatically calculated is to use a table, and put each number field that you want included in the calculation in a separate cell. Table cells in Word are referenced like they are in Excel, as A1, A2, B1, B2, and so on, with the letter representing the column and the number representing the row (in Word, you can't see those letters & numbers; you have to count them yourself). See the example below.

Note: Cell references in Word, unlike those in Microsoft Excel, are always absolute references. For example, referring to a cell as A1 in Word is the same as referring to a cell as \$A\$1 in Microsoft Excel.

1. First, create the table structure to hold the calculated items and the total. Fill in all of the information that the users will not type in (those areas that will not contain fields and will be protected).

For each cell into which users will type a number that will be calculated:

2. Click in the cell where you want the number box, then click the  button on the Forms toolbar.
3. Double-click on the box and change the Type from "Regular text" to "Number."
4. Choose the number format from the "Number format" box.
5. Check the "Calculate on exit" box. When the cursor leaves this field, the calculated total will be updated.
6. Create fields for each item you want included in the calculation. To create more than one field of the same type with the same properties, you can copy and paste them. (Highlight the first field, select Copy from the Edit menu, click in the location where you want to insert another one, and select Paste from the Edit menu.)



To create a field that calculates the totals of some of the other cells in the table:

7. Click once in the cell where you want the total to appear. From the Table menu, select Formula.
8. In the "Formula" box, enter the formula which tells Word which cells to calculate and how*. Click OK.

*Example: in this table, to calculate the total price from the numbers in the last column, you would need to add cells D2 through D4. The formula, which would be inserted into cell D5, would read **=SUM(d2:d4)**. Warning: If you add or remove table cells, the formula does not update automatically (you will need to edit it). When the user enters numbers into the fields, the calculation will be updated when they move to the next field.

	A	B	C	D
1	Items	Quantity	Price Each	Total Price
2	thing 1	2	10.00	20.00
3	thing 2	4	5.00	20.00
4	thing 3	30	2.00	60.00
5	TOTAL			\$ 100.00

Protecting/Locking the form

1. When you're finished adding all of the desired form fields, you should protect the form and test it, so that you can see how it will look to users.
2. Click the  button on the Forms toolbar. Fill in the form fields and make sure that everything works as you expected. When finished testing, click the  button 3 times to clear the form fields and unlock the form.
3. Finally, you need to properly protect the completed form so that users can only type in the fields you specify, which prevents them from altering the document's formatting. Go to Tools ► Protect Document, then:
 - **Word 97:** In the dialog box, choose Forms. Enter a password and click OK. You'll need to re-enter the password to confirm. Although it says the password is optional, protecting the document is useless without it. If you don't enter a password, anyone will be able to unprotect the form.
 - **Word 2003:** In the task pane on the right, check the box under "2. Editing restrictions." From the drop-down menu, choose "Filling in forms." Click the button that says "Yes, Start Enforcing Protection." Enter a password in both boxes and click OK.
4. Save the file. When you edit the form, remember to lock it with a password and save it when finished.

Assistance and Questions

If you have any questions or need more information, please call the Help Desk at (920) 403-HELP (4357), contact us via e-mail at helpdesk@snc.edu, or stop by the Help Desk in Cofrin 101. The Help Desk is for St. Norbert College students and employees only.