

# Creating Forms

Forms are a way of life now, someone is always asking you for information and in order to do that, you must complete or fill out a form. What is a form? If you think about it, a form is a convenient, though not always simple, method to collect the essential bits of information about a subject ... whether it is a job application or a tax form.

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## About Word Forms

You can create forms in either Microsoft Word, Microsoft Access, or Microsoft Excel. Which one should you use? To be honest, it really depends upon the purpose of the form, and the kind and type of data you will collect using the form. Use these bullet points as a guideline:

- Does your form contain complex text and data formatting, and/or pictures, and/or check boxes, and drop-down lists? If any of this is true, then your best bet is Word or Access.
- Are you collecting a large amount of data and/or do you need to relate one set of data with one or more other data sets? If so, then you had better work with Access.
- Are you collecting data for use in calculations, and/or statistical analysis? If this is the case, then your best choice is Excel.

## A Word Form is a Template

When you create a form in Word, you are in effect creating a special kind of Word template. Each time you use the form for data collection, you are in reality creating a new Word document based upon the template represented by your form.

## Form Protection

Given that, the best way to use a form is to **create** it and then **protect** it. By doing this, the user cannot change the form, s/he can only move from one data entry field to another to enter the desired information.

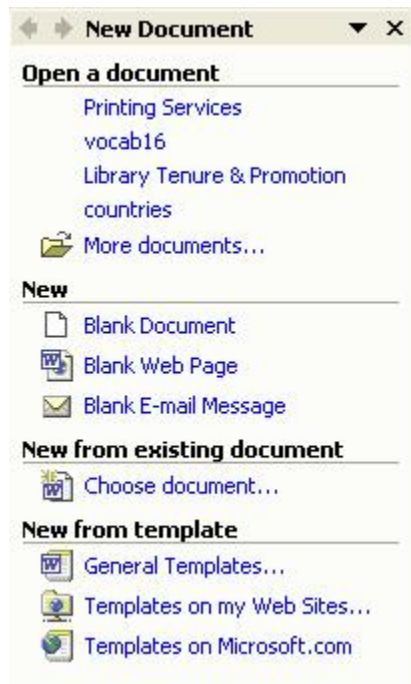
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## Creating a New Form

### To Create a Template Form or Not?

If you create a template, then that form will always be available for you each time you need a new, blank form.

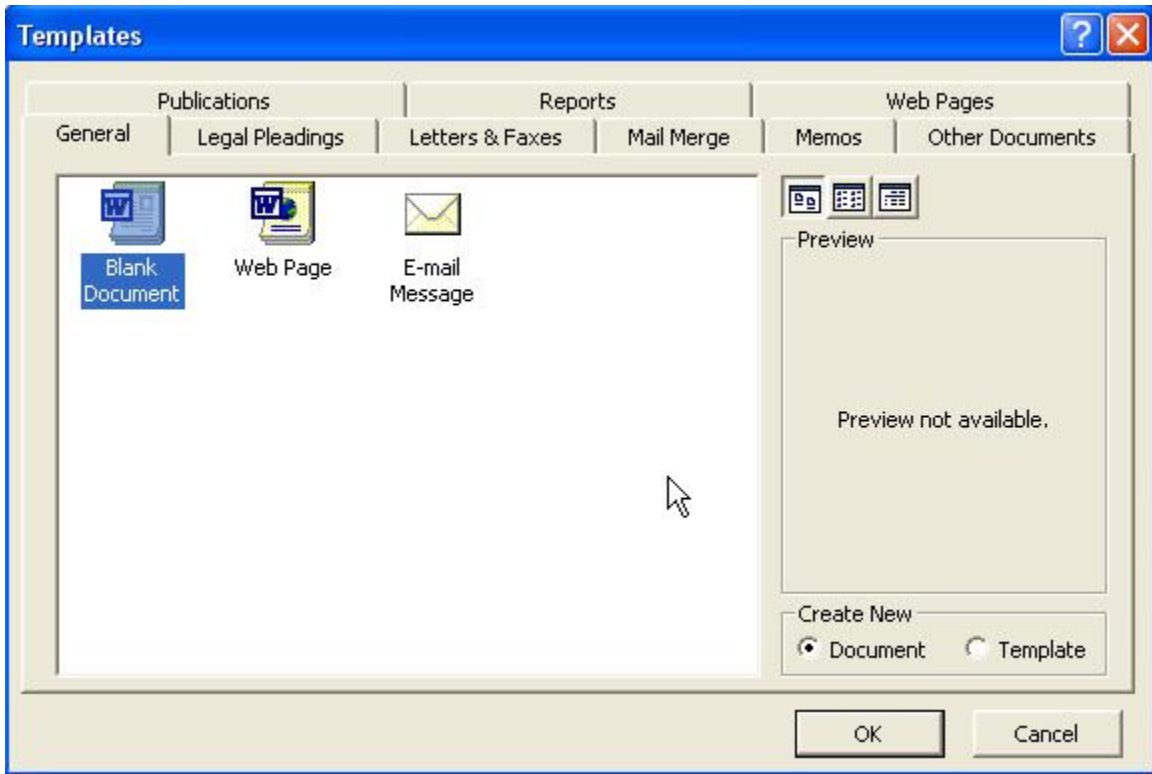
### Start a new template in Word XP (Windows)



*the New Document Task Pane  
Word XP*

- Choose **File** → *New*
- the New Document task pane will open along the right of your screen
- under **New from template**, click “General Templates”
- the **Templates Dialog Box** will open as shown below
- Select an existing template to use as a guide, or choose Blank Document
- click the **Template** radio button, lower right of the dialog box
- Click
- Choose **File** → *Save As*
  - It is always a good idea to save what you have started under a different name so that you do not accidentally make changes to the template!
- Enter a name for your new template
- Click

- o Note that the default location to save a new template is in the Template folder
- o By saving here, this template will now be available each time you open the **New** dialog box



*The New Dialog Box in Word XP. Under the General tab, you will see one or more templates. If you have already created one or templates, your list will be different. Note the other tabs for other types of templates. Click the Template radio button so that what you create will be saved as a Word Template, not a Word Document.*

Any template that you create will be stored on your hard drive in the Templates directory/folder within the Microsoft directory/folder. Thus, any templates that you create will always be available to you by simply opening the **New Dialog Box** from within any Microsoft Office application. If you prefer, you can store the template in a different location. However, if you do, then the template will not be available to you via the **New Dialog Box**.

If you are creating a form that will not be used repeatedly, then you can generally skip the “Create a New Template” step and just start with a blank Word document.

## So when should you create a form as a template?

The decision is entirely up to you. Here is the rule-of-thumb that I use:

- I am the only user of the form
  - then I want it available to me on my hard drive
  - so in this case I start the process by creating a template
  - then I create the form
  - the form then becomes a template and when opened by the **New Dialog Box**, the form opens as an untitled document
- The form needs to be available to others
  - then the form cannot be on my hard drive but must be posted in an area accessible to others
  - in this case, I skip the step of creating a template and just create the form
  - the form is then protected and saved, and then posted in an area accessible to those that need to use the form

## The 3- or 4-Step Process to Creating a Good Form




1. Start a new template. (optional, [steps as described above](#))
2. Enter the desired text, interspersed with the necessary fields where data will be entered.
3. Protect the form template
4. Save the form in an appropriate place
  - a. in the Templates directory/folder within the Microsoft directory/folder if a Template form
  - b. or in a place of your choosing if this form is to be used by others

## Adding Text and Inserting Form Fields

- Adjust the margins and put the basic text information in place. Just type the text and format as you would any other Word document. Treat your form template just as you would any other document in Word, after all, that is just what it is!
- Insert Form Fields in the document where you want to place “fill-in” information. All form fields are inserted using the **Forms Toolbar**.
  - If this toolbar is not currently visible, choose **View** → *Toolbars* → *Forms*
  - There are three types of forms fields
    - text box field (use for entering text such as a blank for name)
    - check box field (use for items that are to be checked or not checked)
    - drop-down list (use for items that are to be selected from a pre-defined list of items; creating the list is part of the [properties](#) of this type of field)



*The Forms Toolbar  
Word XP*

- Position the cursor where the field is to be placed
- Click on the appropriate form field button
  -  inserts a text form field
  -  inserts a check box form field
  -  inserts a drop-down list form field
- The form field is now entered in your document
  - you can reposition it by clicking and dragging
  - to delete a field, select it and press the **<Delete>** key

### **To Shade or Not to Shade?**

Form fields can appear shaded in gray in your document, or not shaded. It is up to you. If shaded, the “blanks” to be filled in do stand out. However, if not shaded, you can still underline the fields so that they appear as a traditional “blank” to be filled in.




*click this button to turn on or turn off form field shading*

The default setting for form field shading is “on” as shown in the picture of the Forms Toolbar above

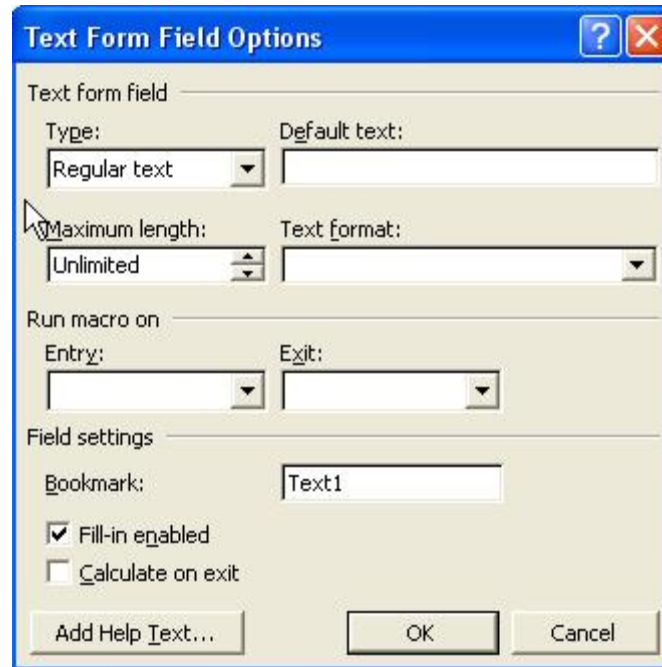
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### **Form Field Properties**

You can customize each form field. To do so, you must open the **Options Dialog Box** for the field. There are three different ways to open this dialog box:

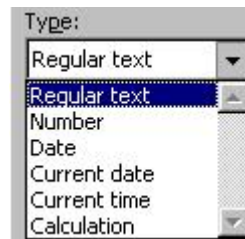
- double-click the form field
- or **right-mouse** click on the form field
- or select the form field and then click on 

## Text Form Field Options



*The Text Form Field Options Dialog Box*

When you click on the Type down arrow in this box, you will reveal a drop-down list with six different types of text entries. Each is explained below.



### Regular Text

- Use when the user is to enter text or a combination of text with numbers and/or symbols and/or spaces
  - Enter a **Default Value**, if needed, in the **Default text:** box
  - Set the format of the text by clicking on the **Text format:** down arrow
    - Uppercase = all letters are capitalized
    - Lowercase = no letters are capitalized
    - First capital = the first letter of the first word is capitalized
    - Title case = the first letter of each first word is capitalized

### Number

- Use when form requires numeric entry (number to be used for a calculation, answer is person's age, etc.)

- whereas text fields can accept text or numbers as data, number fields can only accept number
  - Enter a **Default Value**, if needed, in the **Default text:** box
- Set the format of the number by clicking on the **Number format:** down arrow
  - 0 = numbers with no decimal places
  - 0.00 = numbers with two decimal places
  - #,##0 = numbers with no decimal places and a comma as a 1000 separator
  - #,##0.00 = numbers with two decimal places and a comma as a 1000 separator
  - \$#,##0.00;(\$#,##0.00) = numbers with two decimal places, a comma as a 1000 separator, \$ sign, and negatives in parentheses
    - 0% = percentages with no decimal places
    - 0.00% = percentages with two decimal places
  - once you select one of these number formats, you can modify it to create your own custom number format; for example, select 0.00 and then change it in the format box to 0.0 to have numbers with only one decimal place

### Date

- Use when form requires the entry of a date and/or time
- date fields can only accept dates and/or times; if an invalid date is entered, an error message will appear and user will be permitted to reenter
  - Enter a **Default Value**, if needed, in the **Default text:** box
- Set the format of the date and/or time by clicking on the **Date format:** down arrow
- Assuming today's date, which is May 7, 2002, then if you entered 5/7/02 in the date field, the display is
  - MM/dd/yy = date as 05/07/02
  - dddd, MMMM dd, yyyy = date as Tuesday, May 05, 2002
    - MMMM d, yyyy = date as May 5, 2002
    - MM/dd/yyyy = date as 05/07/2002
    - yyyy-MM-dd = date as 2002-05-07
  - d-MMM-yy = date as 7-May-02 (3 letter abbreviation for month such as Jan, Feb, etc.)
    - MM.dd.yy = date as 05.07.02
  - MMM.d, yy = date as May. 7, 02 (3 letter abbreviation for month such as Jan, Feb, etc.)
    - d MMMM yyyy = date as 7 May 2002
    - MMMM yy = date as May 02
  - MMM-yy = date as May-02 (3 letter abbreviation for month such as Jan, Feb, etc.)

- If times are included, then enter them in 24 hour format. Thus if the date is entered as 5/7/02 and the time as 16:00
  - MM/dd/yy h:mm am/pm = date and time as 05/07/02 4:00 pm
  - MM/dd/yy h:mm:ss am/pm = date and time as 05/07/02 4:00:00 pm
  - h:mm am/pm = time only as 4:00 pm (even if date is entered, only time displayed)
  - h:mm:ss am/pm = time only as 4:00:00 pm (even if date is entered, only time displayed)
    - HH:mm = time only as 16:00
    - HH:mm = time only as 16:00:00
    - dates are always entered as m/d/yy, such as 5/7/02
  - times are always entered in 24 hour format as hh:mm, such as 11:00 for 11 am and 16:00 for 4 pm

#### Current date or Current time

- Use either of these types to automatically insert the current date or current time as shown by your computer's clock.
- Any of the date and time formats discussed above are available for these types.

Microsoft Word can update the field if either current date or current time is selected when the form is printed. To do this, simply select the **Update fields check box** under Printing options

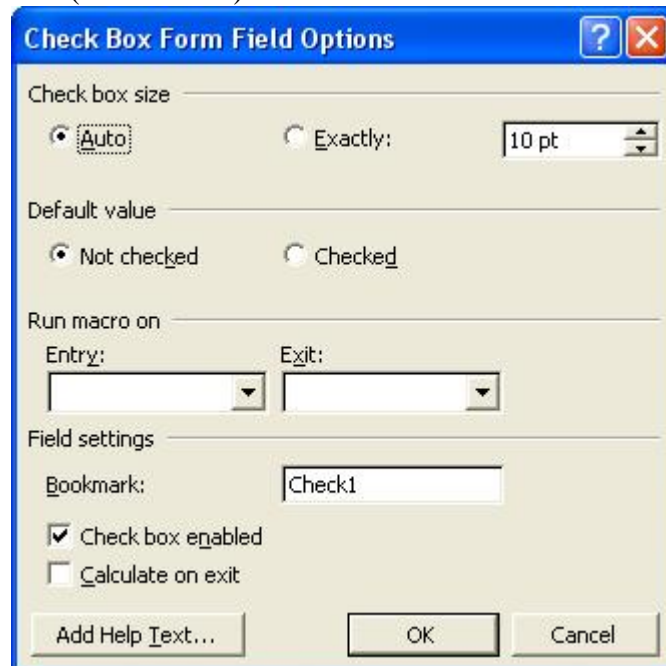
#### Calculation

- Use this field type whenever you need to calculate a value based upon one or more other fields in the form. To do so, you must create an **Expression**. For example:
  - = wholesale \* markup takes the amount in the wholesale field and multiplies it by the amount in the markup field
  - = goals/15 takes the amount in the goals field and divides it by 15
    - Note that an expression always begins with =
  - To construct an expression you may use the following operators
    - + for addition
    - - for subtraction
    - \* for multiplication
    - / for division
    - % for percent
    - ^ for powers and roots
    - = for equal to
    - < for less than
    - <= for less than or equal to
    - > for greater than
    - >= for greater than or equal to

- $\neq$  for not equal to
- Calculated fields are not limited to these operators since Word can recognize cell-naming conventions and functions as used in Excel. Thus it is possible to construct some fairly sophisticated expressions and make use of them in tables!
- Calculated field use the same number formats as described earlier.

### Checkbox Form Field Options

There is not much you can do to a check box field, it is either on (checked) or off (not checked).



*The Check Box Form Field Options Dialog Box*

- to specify the size of the check box, click **Exactly** under **Check box size** and set the point size
- the default value for a check box is **Not checked**; you can set this to **Checked** if you wish


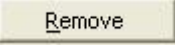

### Drop-Down List Field Options

Whenever the information for a field is limited to a list of choices, often called a “pre-defined list”, it is best to use a Drop-Down List Field. This ensures that there are no invalid entries and that the entries are made in the format you desire. For example, if the field is for the state of residence, and you want to use the postal abbreviation for the states, then create a list of states using the 2-letter abbreviation. The bottom line is that the drop-down list gives the user a choice of valid field values and the user must make his/her selection from this list.

To create your list of items, you must use the **Drop-Down Form Field Options dialog box**.



*The Drop-Down Form Field Options Dialog Box*

- enter the first item for you list in the Drop-down item: box, check your typing, then click 
  - repeat until you have added each item for your list
  - you can rearrange the order of the list by clicking on a list item and then the appropriate Move arrow
  - you can delete any item from the list by clicking on a list item and then clicking 
- make sure that the Drop-down enabled box is checked, otherwise the “drop-down” feature of the drop-down list will not work!
  - when all items are entered and checked, click 

*Pre-defined lists often include as the first choice what is commonly referred to as a “prompt”. What is meant by a “prompt”? Often when you present the user with a list of choices, data entry can be made user-friendly by having the first choice a suggestion as to what the user is asked to do. This is known as a “prompt”. For example, if you are completing a form with your address, the first item in the list of states might be “Select State”. There is also a nice added benefit of*

*having a “prompt”. You will know if the user fails to make a selection because the default choice, the “prompt”, will still be the answer. Review the “Personal Computing Profile” in the syllabus to see how I used prompts. In Word forms, you can also use Help Text as a prompt. More about that next.*

## Using Help Messages



*The Form Field Help Text Dialog Box*

You can include helpful text with any form field to assist users in the completion of the form. These messages can appear at the bottom of the screen in the status bar, in a Help Dialog Box when the F1 key is pressed, or both. It is your choice.

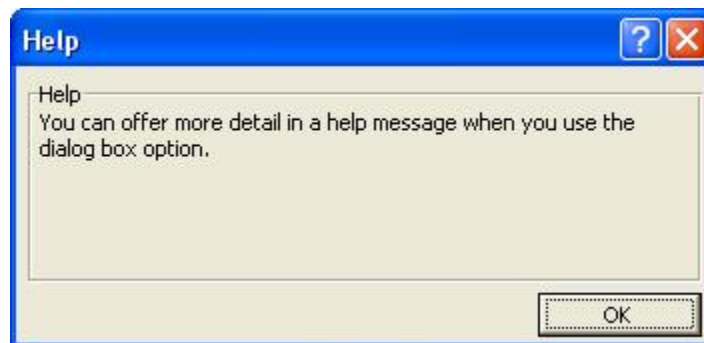
- click **Add Help Text...** to open the **Form Field Help Text Dialog box** (the box is the same regardless of the field type)
  - Use the Status Bar tab to control and set messages that will appear on the Status Bar
  - Use the Help Key tab to control and set messages that will appear in a dialog box when **F1** (Windows) or **Cmd+/** (Macintosh) is pressed
    - select one of the tabs
    - click Type your own:
      - type the desired message that will serve as your help text
- select the other tab and repeat *if* you want the help text to be available in both the status bar and in a dialog box
  - click **OK**

*Help Text can serve the same function as prompts! See previous section.*

- Status bar help messages appear whenever a user enters a field with help text. Due to the limited space of the status bar, these messages should be kept simple.
- Help dialog boxes only appear when the user presses the Help key, that is **F1** (Windows) or **Cmd+?** (Macintosh). Since you have more space in a dialog box, you can offer a more complete help message.



*The Status Bar with Help Text*



*The Help Dialog box*

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## Protecting Forms

Now that you have created the form with all of its fields, what should you do next?


*Protect It!* When you protect a form:

- the user is prevented from editing the form, the user cannot make any changes to the body of the text, the user can only enter information in the form fields (s/he can change these entries)
- some menu commands are no longer available (see the **Insert**, **Format**, **Tools** and **Table** menus, for instance)
- calculation fields only display the results of the calculation, the formula cannot be viewed nor changed


## To protect a form

- choose **Tools** → *Protect Document* to open the **Protect Document dialog box**
- click the **Forms** radio button
- enter a password (note this is optional but read below)
- click 
- you will now be asked to reenter your password
- click 
- once protected a form cannot be edited without unlocking it via the password



You can also protect a form by clicking on the  button in the **Forms Tool Bar**. However, this does not give the option of setting a password. When a form is protected, this button becomes highlighted and the command in the **Tools** menu reads *Unprotect Document*

## To unprotect a form

- choose **Tools** → *Unprotect Document*
- or click  on the Forms Toolbar (This form acts as a toggle switch. As shown, it indicates that the form is protected, click to unprotect. When the lock is not highlighted as shown, it means the form is not protected, click to protect. See next item.)


*To reiterate, you can also protect a form simply by clicking the Protect Button on the Forms Toolbar. By clicking this button, Word protects the form without asking for a password. Click the button again to unprotect. This is fine during the design phase of the form. However, you may want the extra protection of password protection once the form is actually used by others.*

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## Using and Printing Forms

Now that your form is completed, protected and saved, it is ready for the public to use!

### If the form was saved as a Word template


- choose **File** → *New*
- the **New Dialog Box** will open (see [above](#)), select the desired template
  - click 
- the form will open, the cursor will be positioned in the first field
  - enter the requested information
  - press <Tab> to move to the next field
  - repeat as needed to complete the form
- name and save the new document or simply print it without saving, or do both

### If the form was not saved as a Word template

- choose **File** → *Open*
- the **Open Dialog Box** will open, select the desired file
  - click 
- the form will open, the cursor will be positioned in the first field
- **immediately** choose **File** → *Save As* to rename and save your form
  - as an extra precaution, this will ensure that you keep the blank form and your completed form separated by having two different filenames
    - enter the requested information
    - press <Tab> to move to the next field
    - repeat as needed to complete the form
- save the changes to the document or simply print it without saving, or do both

### Print a Form

Printing a form is really not any different from printing any Word document. The only thing that you may want to consider, if the form contains several graphic objects and explanatory text, you may want to only print the data that has been entered. To do so:

- choose **File** → *Print*, or press **Ctrl+P** (Windows) or **Cmd+P** (Macintosh)
    - then if Windows:
      - click  in the **Print Dialog Box**
  - then for either, in the Options for current document only section, click Print data only for forms
-