In This Chapter

- Creating a new form with check boxes, drop-down list boxes, and text box fill-ins.
- Customizing each of the three form fields.
- Adding help text to any field to assist users as they fill in the form.
- Protecting a form from accidental modification.
- Testing a form to make sure the form fields work the way you want them to.
- Capturing form data by saving the information to a file that you can easily import into Microsoft Excel or Access.

19

Working with Forms

You may not think that you will ever use forms, but when you discover just how easy it is to create a form in Word, you might change your mind. Inserting a check box is as easy as clicking a button on a toolbar. Creating a drop-down list with a specific set of entries is just as simple. And creating a text form field to accept numeric entries and to format those entries with your chosen format—that's a piece of cake.

The form fields might be the most over-looked and under-utilized features in Word, and I'm here to tell you that it is a waste of technology to keep them hidden. You'll be pleasantly surprised at how quickly you can set up a form for fill-in.

Creating a New Form

Using Word's fields and the Forms toolbar, you can create forms that will be printed and filled out, or those that will be filled out in Word. The advantage of an electronic copy is that you can distribute it via email or through a corporate intranet. If you do plan to print the form so that it can be filled out later, make sure you allow enough room for a written response.

Before you start creating the form, take a few minutes to sketch out how you want your form to look. Consider whether you want to create your form in a table. Tables offer many advantages. Namely, you can format and customize each table cell to suit your needs. Long descriptions can be wrapped within the confines of a table cell, instead of sprawling across the line. Remember, you can turn off the table lines so they don't appear onscreen or when you print the form. See Chapter 9, "Creating and Formatting Tables," for more information on Word tables.

Creating a New Template

A form is really a form template, so the first step is to create a new template. You can create a template from scratch (blank document), or you can use one of the predefined Word templates as a starting point. For example, you might decide to start with one of Word's memo templates and then modify it for your use.

If you've already read Chapter 14, "Using Templates and Wizards to Build Documents," you have already seen some of the predefined templates.

Follow these steps to create a new template:

1. Choose **File**, **New**. The New Document task pane appears (see Figure 19.1).
2. Choose **On my computer** in the Templates section to display the Templates dialog box (see Figure 19.2).
3. To start a template from scratch, select **Blank Document** in the General tab. Otherwise, select the template you want to use as a starting point.
4. Select **Template** in the Create New section.
5. Click **OK**. Word opens the new template in a document window. At this point, the template has a default name, so you should save it with a more descriptive name right away.

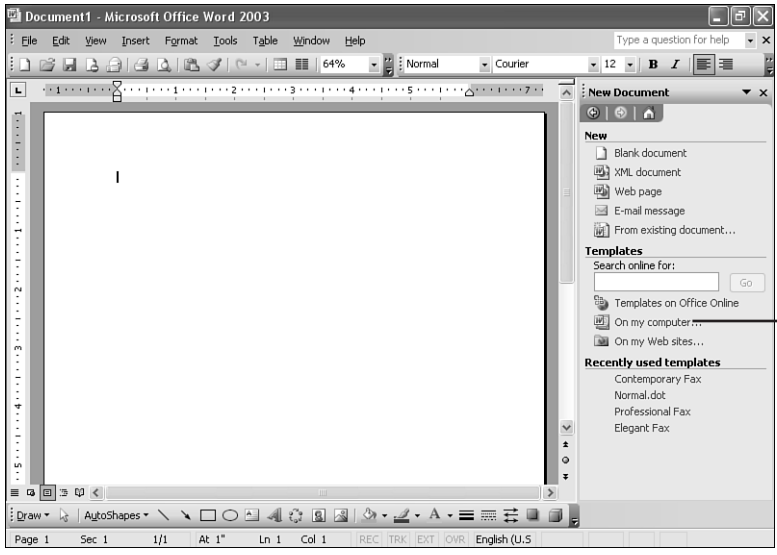


FIGURE 19.1
The New Document task pane has all the options for creating a new document.

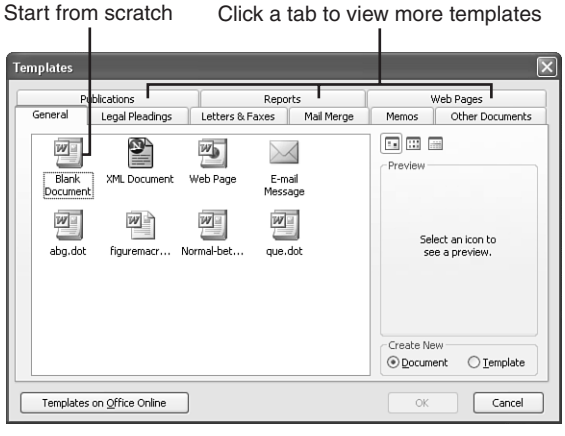


FIGURE 19.2
The Templates dialog box contains the templates that are included in Word 2003, as well as those you create.

Turning on the Forms Toolbar

The next step is to turn on the Forms toolbar, which contains buttons for inserting items into a form. Right-click a toolbar and choose **Forms**. The Forms toolbar appears (see Figure 19.3).

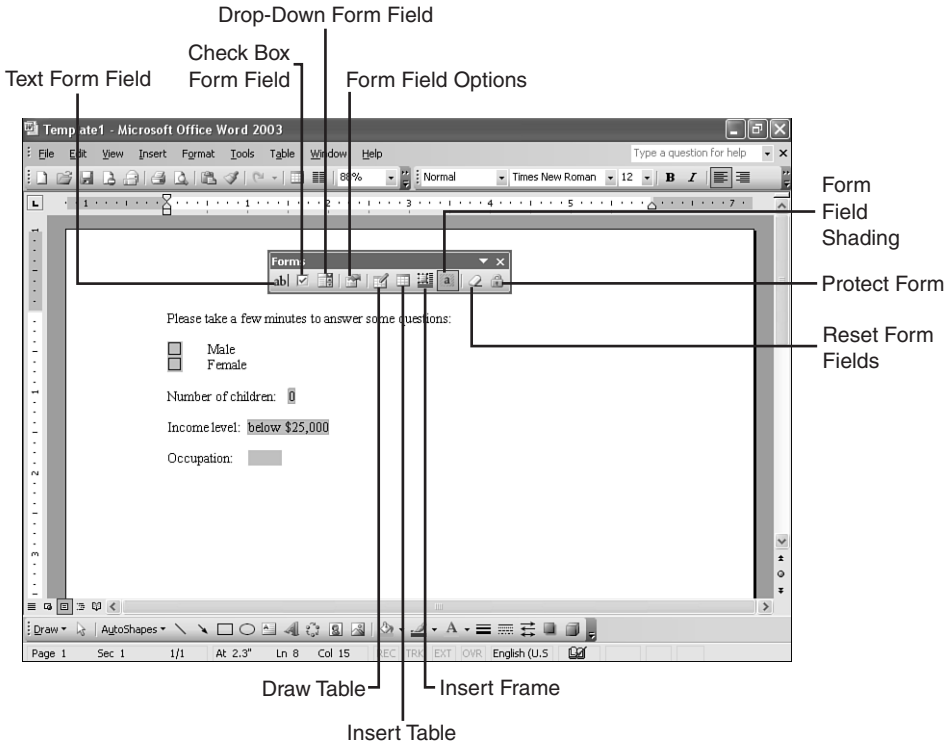


FIGURE 19.3
The Forms toolbar has buttons for inserting and customizing fields.

The next step is to add form fields. You can incorporate the following types of fields in a form:

- **Check boxes**—For simple yes or no questions.
- **Drop-down lists**—People love these. Choosing from a list of options is preferable to typing an entry. You can include up to 25 items in a drop-down list.
- **Text form fields**—These items can hold an infinite amount of information, or only a certain number of characters. You have lots of options for customizing the input, including using correct date formats.

Adding Check Boxes

Because the check box is the first field you will insert, take a few minutes to make necessary changes to the text. Add any headings or explanations, remove things you don't want, and adjust the formatting if necessary. Whenever you're ready, make sure you position the insertion point before you insert the check box field.

To insert a check box, do the following:

1. Type any text that you want to precede the check box.
2. Place the insertion point where you want the check box to appear. In Normal view, use the **spacebar** or **Tab** key to move over a bit. In Print Layout or Web Layout view, double-click in the document window.
3. Click the **Check Box Form Field** button to insert a check box field (see Figure 19.4).

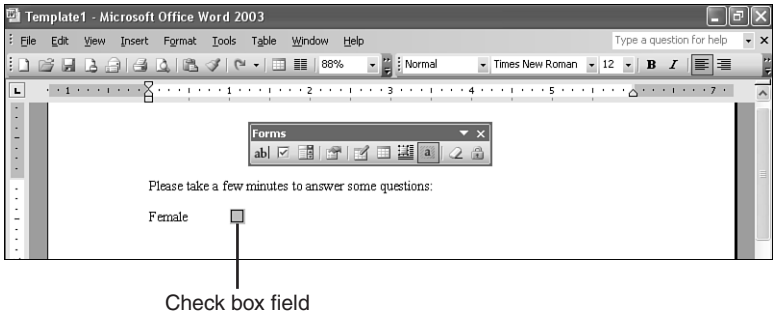


FIGURE 19.4
Form fields have a gray background to make them easier to see.

4. With the form field still selected, click the **Form Field Options** button to open the Check Box Form Field Options dialog box (see Figure 19.5). You can also double-click the field to open this Options dialog.

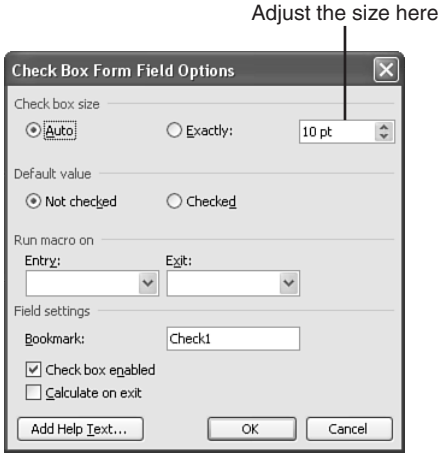


FIGURE 19.5
You can customize check boxes in the Check Box Form Field Options dialog box.

5. If you want a check box selected by default, choose **Checked** in the Default value section.
6. To make a check box larger or smaller, choose **Exactly** and then select a value in the drop-down list.
7. Click **OK** when you're done.

Including Drop-Down Fields

Drop-down fields are popular because they allow the user to select from a list, rather than having to type something in. Form creators like them because they limit the responses to a specific list, which makes it easier to compile and organize the information.

To insert a drop-down field, follow these steps:

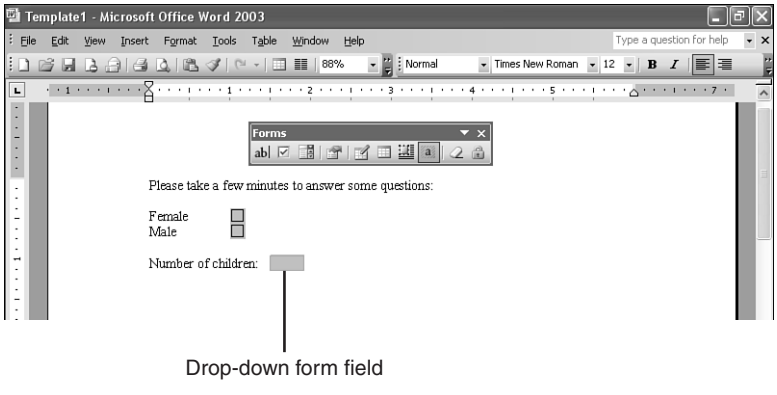
1. Type any text that you want to precede the drop-down field.
2. Place the insertion point where you want the check box to appear. In Normal view, use the **spacebar** or **Tab** key to move over a bit. In Print Layout or Web Layout view, double-click in the document window.
3. Click the **Drop-Down Form Field** button to insert a check box field (see Figure 19.6).

tip

The shading that you see on the form fields is there to make it easier for users to see which items need to be filled in. It differentiates the fields from the rest of the text. This shading appears only onscreen, so it won't print. Click the **Form Field Shading** button to turn the onscreen shading on and off.

If you would like to apply shading to any part of your form that will print, do it through the Borders and Shading options (see the section titled "Adding a Fill" in Chapter 11, "Working with Graphics," for more information on shading).

FIGURE 19.6
A new drop-down form field has been inserted.



4. With the form field still selected, click the **Form Field Options** button to open the Drop-Down Form Field Options dialog box (see Figure 19.7). You can also double-click the field to open this Options dialog.

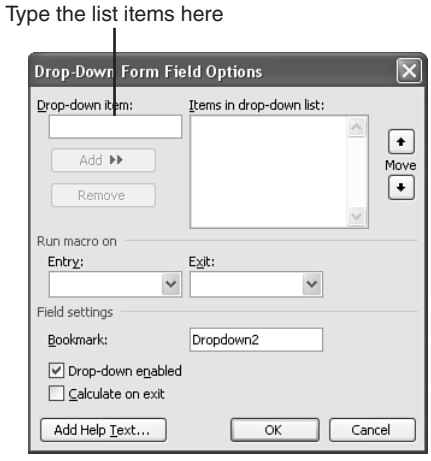


FIGURE 19.7
You can type your list of entries and otherwise customize the drop-down form field in the Drop-Down Form Field Options dialog box.

5. Type the first entry in the **Drop-down item** text box and then choose **Add** to include it in the list.
6. Continue typing items until you have everything you need. You can place up to 25 items in a list (see Figure 19.8).

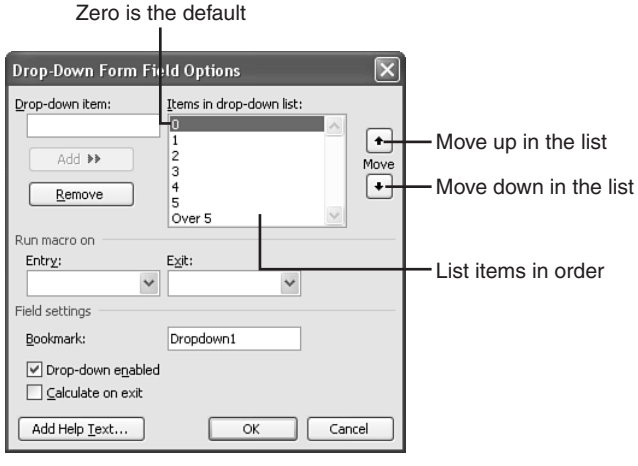
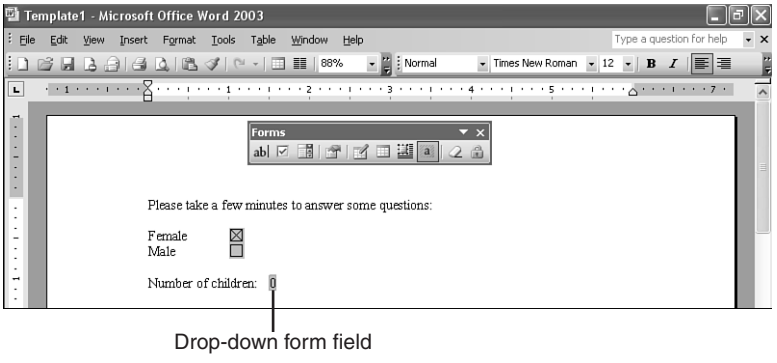


FIGURE 19.8
Arrange the entries in the order you want them to appear in the drop-down list.

7. If you want to rearrange the list, select an entry and click the **Move** arrows.
8. Click **OK** when you're done. Word inserts a drop-down form field in the template (see Figure 19.9).

By default, the first entry in the list will be displayed in the drop-down form field. To make your forms more convenient for people to use, place the most common answer first, so it appears in the drop-down list box. Because this is often the correct answer, most people can skip that drop-down list and move on to the next.

FIGURE 19.9
The drop-down form field shows the first entry in the list by default.



Inserting Text Form Fields

The text form fields offer the most flexibility, so you'll probably end up using them quite a bit. You can limit the number of characters that someone can type in, and you have lots of control over how the text looks in the field.

Let me give you a couple of examples. Say you want someone to fill in a value. You can pick a format for the numbers, and when the user types in a value, Word will apply the selected format to the number.

To insert a text form field, do the following:

1. Type any text that you want to precede the text form field.
2. Place the insertion point where you want the check box to appear. In Normal view, use the **spacebar** or **Tab** key to move over a bit. In Print Layout or Web Layout view, double-click in the document window.
3. Click the **Text Form Field** button to insert a text form field (see Figure 19.10).

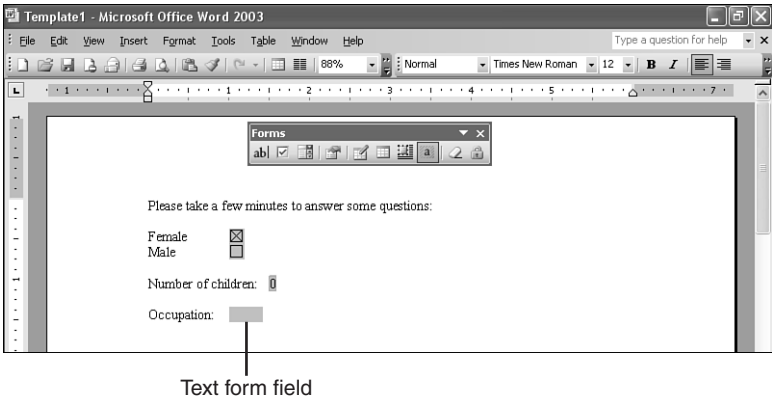


FIGURE 19.10
A new text form field appears in the text.

4. With the form field still selected, click the **Form Field Options** button to open the Text Form Field Options dialog box (see Figure 19.11). You can also double-click the field to open this Options dialog.

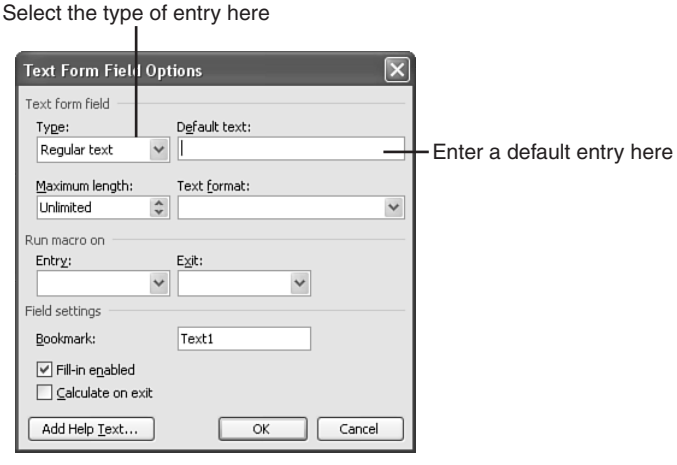
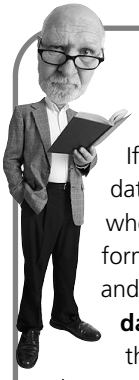


FIGURE 19.11
Specify how information is formatted when entered into a text form field in the Text Form Field Options dialog box.

5. Select the type of entry from the **Type** drop-down list. When you do, the other dialog box options change so you can customize that particular type of entry.
6. Using the dialog box options, decide how you want the entry to appear. For example, if you selected **Number** as the entry type, enter a default value to appear in the text field. Select a format for the number if you like.
7. Click **OK** when you're done.

Adding Help Text to a Form Field



tip

If you want the current date and/or time entered whenever someone fills in a form, insert a text form field and then choose **Current date** or **Current time** in the **Type** drop-down list. Those two fields really come in handy when you work with time-sensitive information.

Adding help text to a field is the easiest way to make sure the entries are correct and consistent. If there is any question about how a question should be answered, go ahead and add some help text. The people who fill out the forms will thank you for it. You can type an explanatory message that will appear on the status bar or in a help window when you press F1.

You can add help text to any of the three form fields: check box, drop-down list, or text form. You can set up the help text to appear on the status bar, or, for longer explanations, you can create a help message box that appears when the user presses F1.

To add help text to a field, follow these steps:

1. Double-click the form field, or select the field and click the **Form Field Options** button.
2. In the Options dialog box, choose **Add Help Text** to display the Form Field Help Text dialog box (see Figure 19.12).

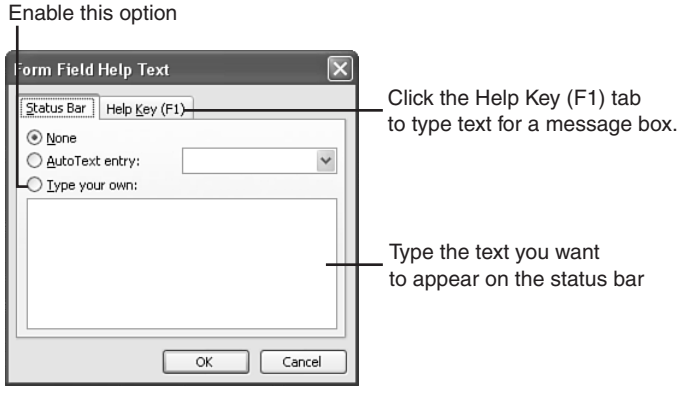


FIGURE 19.12
Type explanatory text that will appear on the status bar, or in a message window, in the Form Field Help Text dialog box.

3. Click in the **Type your own** message box and then type the text you want to appear on the status bar. You might need to enter text a few times to get an idea of how much will fit on the status bar.

4. If you need more room, or if you would prefer to display the instructions in a message box, click the **Help Key (F1)** tab and type text for a message box. When the user selects a field and presses F1, a Help message box will appear (see Figure 19.13).

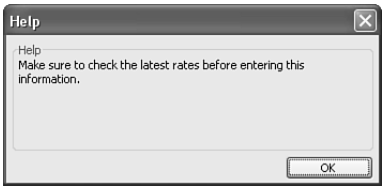


FIGURE 19.13
The Help message box can hold more information than the status line.

Protecting and Saving a Form

When you distribute a form electronically, you don't want the users to accidentally change the form as they fill it in. To prevent accidental changes, you can protect the form. The key is to remember that before you can make changes to your form, you have to unprotect it.

Follow these steps to protect a form:

1. Click the **Protect Form** button on the Forms toolbar. The form is now protected. You, or anyone else, cannot make any changes at this point.

2. Click the **Save** button on the toolbar (or press **Ctrl+S**) to save the protected form.

To unprotect a form, click the **Protect Form** button on the Forms toolbar. The form is now unprotected. You are now free to continue making changes to the text and form fields.

For a higher level of security, protect the document using the options on the Protect Document task pane. You can assign a password so that only those users who know the password can remove the protection.

To protect a form using a password, follow these steps:

1. Choose **View**, **Task Pane** (**Ctrl+F1**) to display the task pane.
2. Click the **Other Task Panes** arrow (next to the task pane's Close button) to open the list of task panes.
3. Choose **Protect Document**.
4. Enable the **Allow only this type of editing in the document** check box.
5. Open the drop-down list and choose **Filling in Forms**.

6. Click **Yes, Start Enforcing Protection** to open the Start Enforcing Protection dialog box (see Figure 19.14).

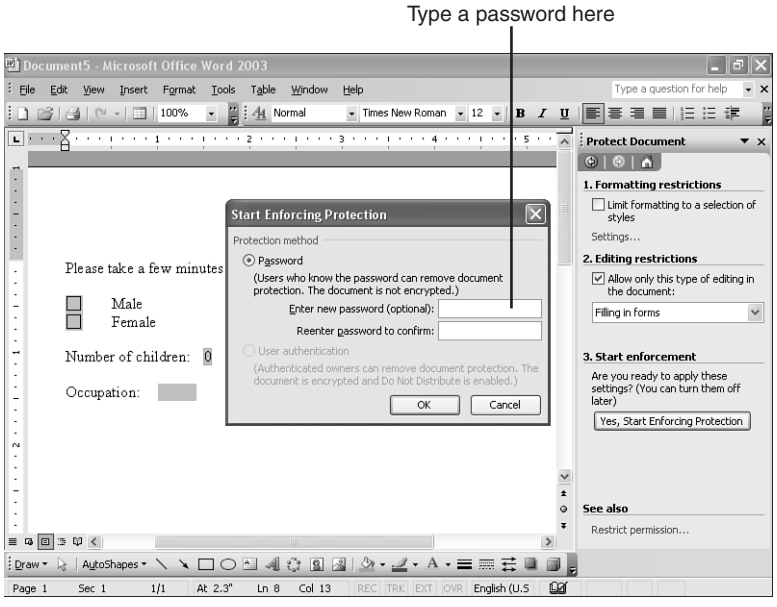


FIGURE 19.14
Protect your forms with a password using the Protect Document task pane.

7. Type a password and then confirm it.
8. Click **OK.** Then, if you want, close the task pane by clicking the Close button.

Testing a Form

When you are developing your forms, you should test them as you go along and make sure everything is working the way you want. To test a form, you have to protect it. After it is locked, you can test the check boxes, open the drop-down lists, and type information into the text form fields. Make sure the help text is displayed on the status bar or in a message box when you select a field and press F1.

When you're ready to continue working on the form, you'll have to unprotect it and then reset the fields to remove the information you entered during the test. To reset the form fields, click the **Reset Form Fields** button on the Forms toolbar.

Capturing the Data

Another advantage of filling in forms electronically is that you can "capture" the data and use it. For example, you might decide to start a database from the information on the forms. There are two ways to grab the data from a form. You can print or save only the data that was typed in (or selected), without any of the labels and instructions.

To print only the data from a form, do the following:

1. Open the document that contains the form data.
2. Choose **Tools**, **Options** and then click the **Print** tab.
3. Enable the **Print data only for forms** check box and then click **OK**.
4. Click the **Print** button.

If you play your cards right, you can save the data from your forms into a file that can be used directly in a spreadsheet or database program. The key is extracting only the form data and saving the data in the right format.

To save the data from a form, follow these steps:

1. Open the document that contains the form data.
2. Choose **Tools**, **Options** and then click the **Save** tab.
3. Enable the **Save data only for forms** check box and then click **OK**.
4. Choose **File**, **Save Copy As**.
5. Type a name for the file in the **File name** text box.
6. In the **Save as type** drop-down list, select **Plain Text (*.txt)**.
7. The default settings will create a comma-delimited text file, which is easily imported into other applications. Click **OK** to create the file.
8. You may also see a File Conversion dialog box, which notes some of the formatting may be lost and asks what sort of text encoding you want. The default Windows encoding is fine, so you can click **OK**.

THE ABSOLUTE MINIMUM

After reading this chapter, you now know how to

- Insert form fields for check boxes, drop-down lists, and text boxes.
- Use the options in the Form Field Options dialog box to customize each type of form field to match your requirements.
- Add help text that will appear on the status bar or in a message box when a user selects a form field and presses F1.
- Protect a form against accidental modification.
- Test the fields in the form using the proper techniques.
- Save the information collected from check boxes and drop-down lists to a file that you can easily import into Microsoft Excel or Access.