Step 1: Set up Word for creating forms

1. Click the **Microsoft Office Button** , and then click **Word Options**.
2. Click **Popular**.
3. Select the **Show Developer tab in the Ribbon** check box, and then click **OK**.

   Note   The Ribbon is a component of the Microsoft Office Fluent user interface.

Step 2: Open a template or a document on which to base the form

1. Click the **Microsoft Office Button** , and then click **New**.
2. Under **Templates**, click **My templates**.
3. Double-click **Normal**, and then click **Template** or **Document** under **Create New**.
4. Click the **Microsoft Office Button** , and then click **Save As**.
5. In the **Save As** dialog box, give the new template or document a file name, and then click **Save**.

## Step 3: Add content controls to the form

Design the form by sketching a layout first, or use an existing form as a guide. In your form, you can add content controls, tables, and other graphics elements.

On the **Developer** tab, in the **Controls** group, click **Design Mode**, and then click where you want to insert a control.
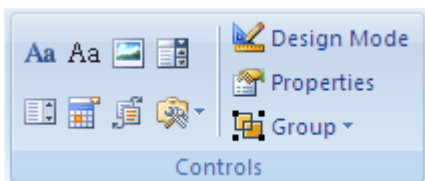
Do any of the following:

Insert a text control where users can enter text

1. On the **Developer** tab, in the **Controls** group, click the **Rich Text** control or the **Text** control .

Insert a text fill-in field

 Important   Spell Check will not flag any errors that are typed in the text form field. If you want to run Spell Check, use the Rich Text control or the Text control.
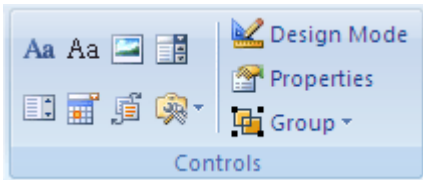
1. On the **Developer** tab, in the **Controls** group, click **Legacy Tools**.

2. Click **Text Form Field**.
3. In the **Controls** group, click **Design Mode**, and then do any of the following:
   o To add a line under the field, select the field, and then click **Underline** in the **Font** group on the **Home** tab.
   o To limit the amount of information a person can type in the field, set a maximum width by selecting the field, clicking **Properties** in the **Controls** group, and entering a value under **Maximum length**.
   o To make the field look as long as its maximum length, add instructional text by clicking **Properties** in the **Controls** group, and typing text, such as **Type your first name here**, under **Default text**.

Insert a drop-down list that restricts available choices to those you specify

1. On the **Developer** tab, in the **Controls** group, click the **Drop-Down List** control ▤.
2. Select the content control, and then on the **Developer** tab, in the **Controls** group, click **Properties**.

3. To create a list of choices, under **Drop-Down List Properties**, click **Add**.
4. Type a choice in the **Display Name** box, such as **Yes**, **No**, or **Maybe**.

   Repeat this step until all of the choices are in the drop-down list.

Insert a check box

1. On the **Developer** tab, in the **Controls** group, click **Legacy Tools**.
2. Click **Check Box Form Field**.
3. Type a space, and then type a label for the check box.
4. To remove the shading from the check box, click **Legacy Tools**, and then click **Shading**.

 Note   You won't be able to select or clear the check box until you protect the form.

Step 4: Set or change properties for content controls

Each content control has properties that you can set or change. For example, the Date Picker control offers options for the format you want to use to display the date.

1. Right-click the content control that you want to change.
2. Click **Properties**, and change the properties that you want.

Step 5: Add instructional text to the form

Instructional text can enhance the usability of the form you create and distribute. You can change the default instructional text in content controls.

To customize the default instructional text for your form users, do the following:

1. On the **Developer** tab, in the **Controls** group, click **Design Mode**.
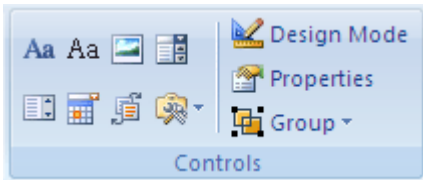
2. Click the content control where you want to revise the placeholder instructional text.
3. Edit the placeholder text and format it any way you want.
4. If you want the content control to disappear when someone types in their own content to replace your instructions in a Rich Text control or a Text control, click **Properties** in the **Controls** group, and then select the **Remove content control when contents are edited** check box.
5. On the **Developer** tab, in the **Controls** group, click **Design Mode** to turn off the design feature and save the instructional text.

 Note   Do not select the **Contents cannot be edited** check box if you want form users to replace the instructional text with their own text.

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Add protection to a form and prepare it for distribution

You can protect individual content controls in a form template to help prevent someone from deleting or editing a particular content control or group of controls, or you can prepare a form to be distributed and filled out by locking it. You can help protect all of the form template content with a password.

 Tip   If you want, you can test the form prior to distributing it. Open the form, fill it out as the user would, and then save a copy in a location that you want.

Protect parts of a form

1. Open the form that you want to protect.
2. Select the content control or the group of controls to which you want to restrict changes.

    To group several controls, select the controls by pressing SHIFT and clicking each control that you want to group. On the **Developer** tab, in the **Controls** group, click **Group**, and then click **Group**.

3. On the **Developer** tab, in the **Controls** group, click **Properties**.
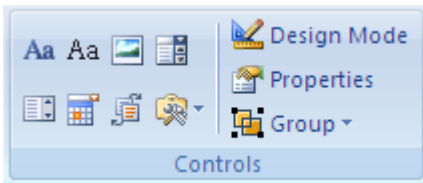
4. In the **Content Control Properties** dialog box, under **Locking**, do either of the following:
   o Select the **Content control cannot be deleted** check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the template.
   o Select the **Contents cannot be edited** check box, which allows you to delete the control but does not allow you to edit the content in the control.

Prepare a form to be filled out

1. Open the form that you want to lock so that it can be filled out.
2. On the **Developer** tab, in the **Protect** group, click **Protect Document**, and then click **Restrict Formatting and Editing**.
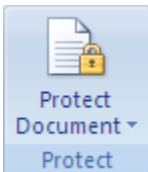
3. In the **Protect Document** task pane, under **Editing restrictions**, select the **Allow only this type of editing in the document** check box.
4. In the list of editing restrictions, select **Filling in forms**.
5. Under **Start enforcement**, click **Yes, Start Enforcing Protection**.
6. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **Enter new password (optional)** box, and then confirm the password.

    Important   If you choose not to use a password, anyone can change your editing restrictions.

    Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better. For more information, see Help protect your personal information with strong passwords.

It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.