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Word 2003
Step by Step Instructions – Creating Forms

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Forms Terminology:

- **Templates:** Forms are normally saved as templates so that they can be used again and again.

- **Form Fields:** Form Fields are the areas where users input information in a form.
  There are three types of form fields you can use: **Text fields, Check Box fields, and Drop-Down fields**.

- **Tables:** Tables are often used in forms to align text and form fields, and to create borders and boxes.

- **Protection:** Forms are protected so that users can complete the form without changing the text and/or design of the form itself.
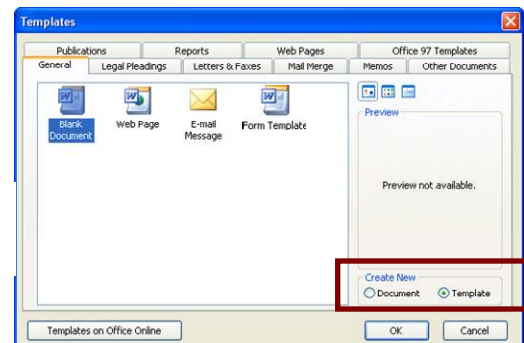

Starting a New Form:

1. Select **File → New** from the menu.
2. Click the **On my computer...** link in the Templates section of the task pane.
3. In the Create New section in the lower right-hand corner of the dialog box, select the **Template option.**
4. Select **Blank Document** and click **OK**.
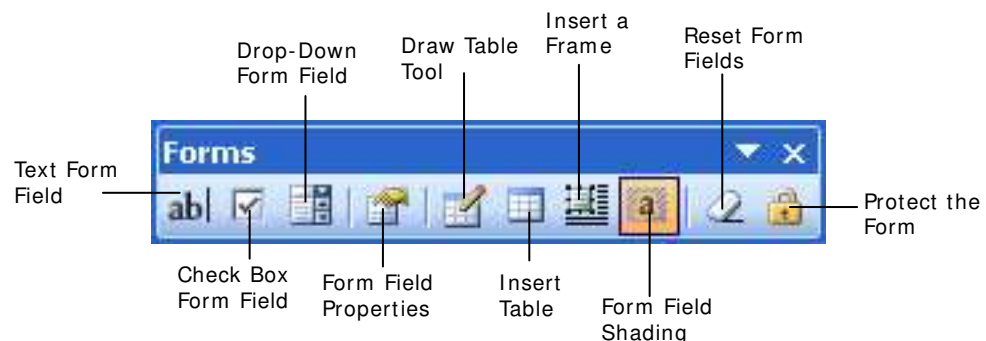5. **Save** the template.

NOTE: This form is saved as a template in the Microsoft Office Template, generally located in C:\Documents and Settings\[your user name]\Application Data\Microsoft\Templates.

Example:

Displaying Forms Toolbars:

- Click **View →
  Toolbars →
  Forms** from the menu.

Drop-Down Form Field · Draw Table Tool · Insert a Frame · Reset Form Fields · Text Form Field · Protect the Form · Check Box Form Field · Form Field Properties · Insert Table · Form Field Shading

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Inserting Text Form Fields:

You can choose from text, date, number, current date, current time, and calculation types.

1. **Place the insertion point in the cell** where you want to place the field.

2. Click the **Text Form Field button** on the Forms toolbar. Text form fields will display, similar to the example below:

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Inserting a Check Box Field:

Check boxes in fields are just like the check boxes you find in dialog boxes. You can use check boxes when you want to ask the user a single-answer question, like a yes or no question.

1. **Place the insertion point** where you want to place the field.

2. Click the **Check Box Form Field button** on the Forms toolbar.
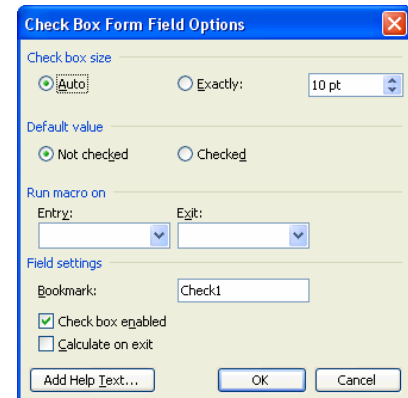

Inserting a Drop-Down Field:

Drop-down lists are used when you want to provide the user with a list of several choices. When the user fills out the form, they see an arrow next to the drop-down field. The user clicks the arrow to display a list of options from which they can choose, and then selects the option they want.

1. Place the insertion point where you want to place the field

2. Click the **Drop-Down Form Field button** on the Forms toolbar.

Specify each choice you want to appear in the drop-down list…

…and click **Add.**

Remove the selected item from the drop-down list.
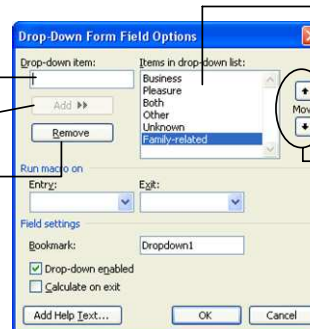
Items that will appear in the drop-down list

Move the selected item up or down the list.

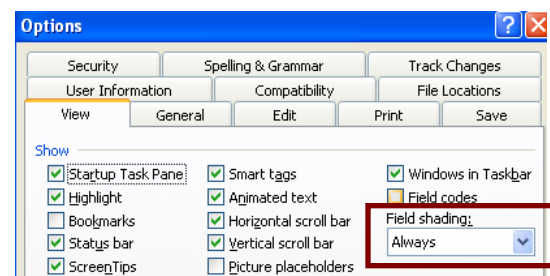**Viewing and/or Changing a Field's Options:**

The Form Field Options icon allows you to specify the type of information that can be entered in a field, and how that information should be formatted.

- **Double-click** the field, or
- **Right-click the field** and select **Properties** from the shortcut menu, or
- Click on the **Form Field Option icon**.
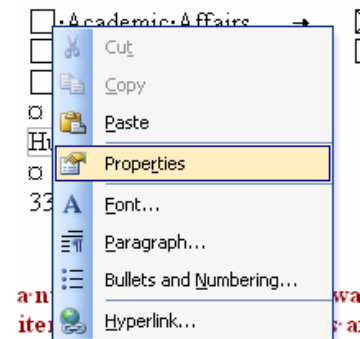
Changing Field Shading:

- Click the **Form Field Shading button** on the Forms toolbar; or

- Select **Tools → Options** from the menu, click the **View tab**, click the **Field shading list arrow**, select **Always**, and click **OK**.

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Adding Status Bar Help Text:

1. **Double-click** the form field.
2. Click the **Add Help Text** button and click the **Status Bar tab**.
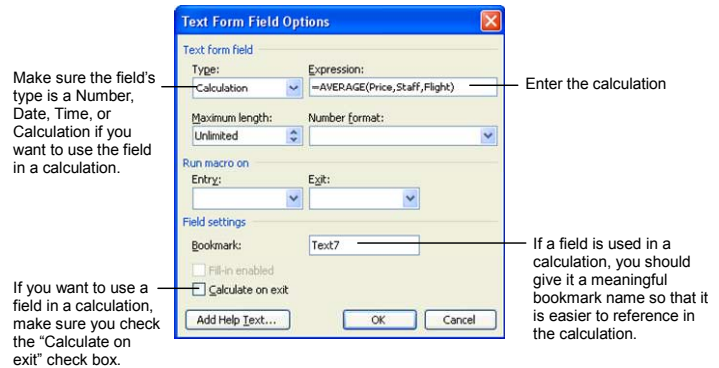3. Click the **Type your own** option, and type the help message you want to appear on the status bar.

If you do not see your department listed, select Others.
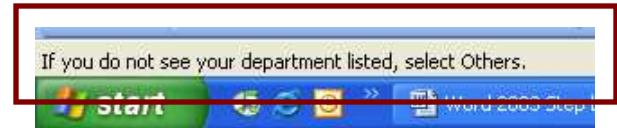
Adding <F1> Help Key Text:

1. **Double-click** the form field.
2. Click the **Add Help Text** button and click the **Help Key (F1) tab**.
3. Click the **Type your own** option, and type the help message you want to appear when user presses the <F1> key.

Including a Field in a Calculation:

1. **Double-click** the field.
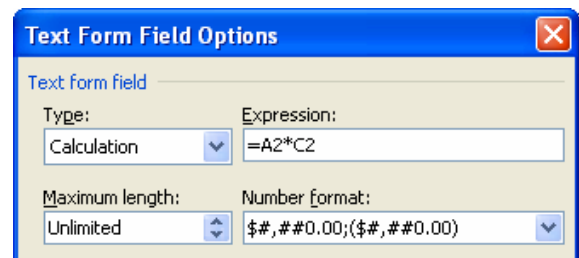2. Make sure the **Calculate on exit** checkbox is selected.

NOTE: You may also want to give the field **a meaningful bookmark name**.

Make sure the field's type is a Number, Date, Time, or Calculation if you want to use the field in a calculation.

Enter the calculation

If a field is used in a calculation, you should give it a meaningful bookmark name so that it is easier to reference in the calculation.

If you want to use a field in a calculation, make sure you check the "Calculate on exit" check box.

Creating a Calculation Field:

1. **Double-click** the field in which you want to display the results of a calculation.
2. Select **Calculation** from the Type list.
3. Enter the formula in the **Expression** text box.

NOTE: If you plan on using a form field in a calculation, you need to **check the Calculate on Exit box**.
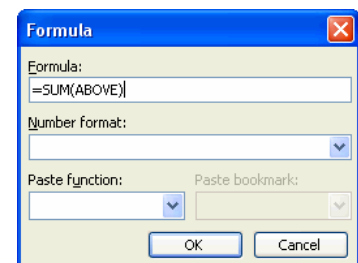
Text Form Field Options
Text form field
Type: Calculation
Expression: =A2*C2
Maximum length: Unlimited
Number format: $#,##0.00;($#,##0.00)

Performing Calculations in a Table:

1. Place the insertion point in a blank cell where you want to insert the formula and select **Table → Formula** from the menu.
2. Enter the formula in the **Formula box**.

NOTE:

- All formulas must start with an equal sign (=).
- Formulas can contain explicit values, such as the numbers 5 or 8, but more often they will reference the values contained in other cells.
- *Functions*, such as the SUM function, are used to perform calculations that are more complicated.

Formula
Formula: =SUM(ABOVE)
Number format:
Paste function: Paste bookmark:

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Protecting a Form:

Before you can use or complete a form, **you must protect it**. Protecting the form makes it ready for data entry and allows the user to move to and enter text in the form fields *only*.

- Click the **Protect Form button** on the Forms toolbar, or
- Select **Tools → Protect Document** from the menu and apply more advanced protection using the Protect Document task pane.

NOTE:
When you complete a form make sure the document is protected, as indicated by the shaded 🔒 **Protect Form button** or you will overwrite fields!
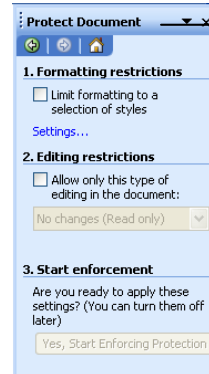
Use the Protect Document task pane to apply advanced protection to the form.
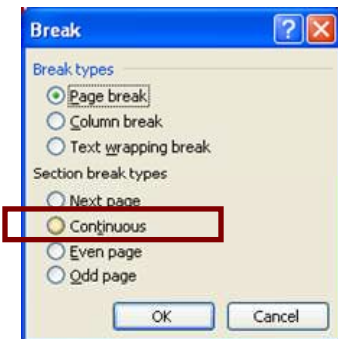
your 🔒

Inserting a Section Break:

You can break a document into different sections, allowing you to protect one section (the section that contains the form fields) while leaving another section unprotected.

1. Select **Insert → Break** from the menu.

2. Select the type of section you want
   (usually **Continuous** to keep the form on the same page).

Protecting Only a Section of a Form:

1. Select **Tools → Protect Document** from the menu.
2. Check the **Allow only this type of editing in the document** check box.
3. Click the **drop-down list arrow** and select **Filling in forms**.
4. Click the **Select sections** link in the task pane.
5. Select the section(s) you want to protect and click **OK**.
6. Click the **Yes, Start Enforcing Protection button** in the task pane and click **OK**.
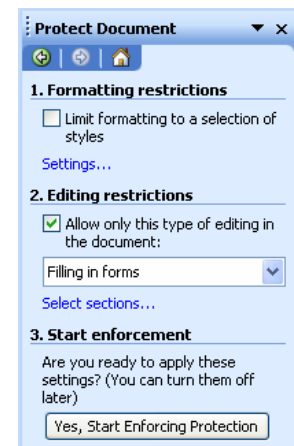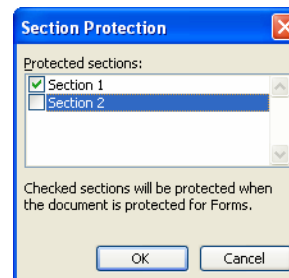
Filling Out a Form:

- Press **< Tab >** to move to the next field;
- Press **< Shift >** + **< Tab >** to move to the previous field.

Other Resources:

SkillEnhancer – You can learn more about how to create forms in Word by selecting the Word Advanced section, under Data Manipulation.