Microsoft Office
Word
FORMS

INFORMATION TECHNOLOGY SERVICES
EAST TENNESSEE STATE UNIVERSITY
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Overview

Microsoft Word is probably the most used software on our campus. It can be modified in a way that it produces documents using our favorite font and style. Modifying MS Word is not as easy as it was a few years/versions before. Now the formatting of a Word document is controlled by the Normal.dotm styles that is set by the software developer. This guide will focus on Microsoft Office 2013 Forms.

Objectives for MS Word Forms

This session is a hands-on see and do training session.

Participants will successfully 100% of the time, before the end of the training session:

- Create a MS Word Form using MS Office 2013
- Add interactive form fields to collect information
- Modify a bookmark name and setting in a Word Form
- Modify and add a drop down Word Form field
- Add help text to Word Form control
- Set check box options in a Word Form
- Formulate and enable a calculated Word Form field
- And Finalize a Word Form by password protecting
Understanding the Word Form Controls

Identify whether you have a ‘Developer Tab’ on the Ribbon. If you do not see a Developer Tab, you will need to add the Developer Tab to the Office Ribbon. Go to File; it should be the first Tab on the upper left corner. The area under the File Tab is called ‘Back Stage’. Locate the Option button and select it. Open the Customize Tab section. In the dialog box that appears, look to the left side, this is the available commands. On the right side are the currently used commands. Look for Developer on the right side and check the box associated with it. Now you have the Developer Tab and you are ready to get started with form development. Choose the Developer Group and to find the hidden Legacy Tools click on the icon that looks like a folder with wrench and hammer.

You will see six Legacy Form Tools.
1. Text Fields
2. Check Box
3. Drop-Down
4. Insert Frame
5. Form Fields Shading
6. Reset Form Fields

Using tables as your Form’s Foundation (skip if you do not want to use tables to arrange forms)

<table>
<thead>
<tr>
<th>Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
</tr>
</thead>
</table>

A Table can help control entry locations and also entry sizes. Using cells and adding cells the author can manage how the form looks and behaves. For example, add a Table below and give it 2 rows with 5 columns.

In Row 1 – Cell 1 insert the word **Name:**
In Row 2 – Cell 2 insert the word First Name
In Row 2 – Cell 3 insert the word Middle Name
In Row 2 – Cell 4 insert the word Last Name
The creator can hide any or all of the borders…

<table>
<thead>
<tr>
<th>Name</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Name</td>
<td>Middle Name</td>
</tr>
</tbody>
</table>

The creator can ‘fix’ the height and width of any cell.

It is much easier to merge or remove columns than it is to add them. You will find all the formatting tools you need on the Insert Tab and the Tables Group on the Ribbon.

Apply a bottom border to provide a horizontal line for user to “type on,” or border all four sides of the table cell to create a box for user input.

**Adding Form Fields**

If the Legacy Forms toolbar is not visible turn it on now (Developer Tab > Legacy Forms).

Form Field shading button is a toggle button. When the form fields are not shaded, they are invisible in the form. To add a form control (FIELD), place the cursor in the area or cell and select any one of the three form fields. The options are text field, check box and drop down.

![Legacy Forms toolbar](image)

**Setting a bookmark name and enabled option**

You do not need to set all the field property options, but it is a good practice to enter a Bookmark name so you can identify field should you need to refer to it later in a formula, calculation or a macro.

Every form field has an Enabled option: Fill-in Enabled is the option for Text field. The option is turned on by default. When this option is turned off, users can not enter data in the field.

**Setting Data Type for Text Form Fields**

<table>
<thead>
<tr>
<th>Text Form Field Data Types</th>
<th></th>
</tr>
</thead>
</table>
| Regular Text | Format as uppercase, lowercase, first capital, or title case
Specific length or unlimited
Default text |
| Number | Format number of decimals and currency or percent
Specific number of digits or unlimited |
<table>
<thead>
<tr>
<th>Field</th>
<th>Default value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default number</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Various, time, and date/time formats</td>
</tr>
<tr>
<td>Current Date</td>
<td>Various date formats</td>
</tr>
<tr>
<td>Current Time</td>
<td>Various time formats</td>
</tr>
<tr>
<td>Calculation</td>
<td>Formula</td>
</tr>
</tbody>
</table>

**Setting Drop-Down List Options**

The Drop Down is the third control from the left in the Legacy Form Tools. Click the Form Field Options button on the Forms toolbar or double click the form field to open the Drop-Down Form Field Options dialog box.

Create the list one item at a time. Type the first entry and click Add button to add the entry to the list. Type the next entry and add it. Use the Remove button to delete a list item; use the two Move buttons to rearrange the list.
Add Help Text to a Form Control

Double-click the form field to which you want to add Help text. A dialog box will appear showing two tabs. The first tab provides an entry field so the creator can enter the help text that will display in the status bar at the lower edge of the screen when folks enter data. The next Tab displays an entry area to create a message that will appear when folks are entering data and select the F1 key.

Setting Check Box Options

Check box form fields are nice and simple; you will set three options: bookmark name, size, and default value (checked or not) in the Check Box form Field Options dialog box.

Adding Calculated Fields

You can “do simple math” with Text form fields and constants (typed in value). You cannot include drop-down list form fields in formulas. Add a text field to a cell. Double click the text field and change it to number format.
Double click the cell where a calculation is to occur; using the dropdown select cell type to be calculation.
In the Expression Field type as follows: =Bookmark Name + Bookmark Name etc
Start protecting the Document.

Protecting Your Form

In the Developer Group select 'Restrict Editing'. Select in the Editing Restrictions to ‘Allow only this type of editing in the document’ - filling in forms.

Next Start Protecting. You can assign a password.

Save your form as a Microsoft Template by doing a Save As Microsoft Template.

Test your form. Do not hesitate to send your form to Knights@etsu.edu and I will be happy to test and give feedback.

Tip

Duplicating Entries

Making the same entry appear in various areas of the document can be accomplished by entering a little code as follows
In the first field, assign it as Text. Give it a name in the Bookmark Field, check calculate on exit. Place the cursor where the next appearance of that word should be and press Ctrl + F9. Inside the squiggles type REF and the bookmark name. Start protecting the Document.
More Tips

Finalizing and Protecting a Document

If a document has been in process for a while or if a document has had tracked changes enabled, it actually holds that information in the background code. The author can use the Document Inspector to thoroughly clean the document and protect it. Here are the steps:

- Go to the File Tab and Enter Backstage
- Select the Info option
- Check for Issues and Inspect the Document
- Check or uncheck boxes as needed
- Select inspect
- Remove or don’t remove selected inspection results
- Next, protect the document by going to Mark the document as Final
- Restrict Access to the document