


Forms in Microsoft Word 2007

Introduction

The following instructions will allow creating simple forms in Microsoft Word 2007. Once the design and layout of the form is complete, form elements (Content Controls) such as **text boxes**, **drop-down menus**, **check boxes** and **radio buttons** may be added allowing for data collection and entry much more efficiently. These elements are added through the **Developer Tab** on the **Ribbon**. This tab allows users to work with ActiveX controls, XML and macros. By default, this tab is not displayed on the ribbon on Windows 2007 applications. It may be added in a few simple steps. The Add-Help Text that appears on the status bar each time focus moves into a field makes these forms readily accessible. The Help Key (F1) may be used to give additional instructions.

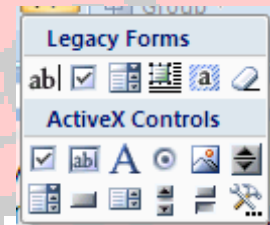
To add:

1. You may either point the mouse cursor to the Office Orb (Button)  or press **ALT+F** to open the Office button menu.
2. Click **Word Options** at the bottom right or press **i**.
3. In the categories pane on the left hand side of the Options dialog box, click on the **Popular** tab (if not first item on list).
4. Click the checkbox beside *Show Developer tab in the Ribbon* to select the option. You may also press **ALT+D** and get the same result.
5. Click **OK** or press enter to close the Options dialog box.

The developer tab is now visible on the ribbon. We will be using the **Legacy Tools** button in the **Controls** group to work with edit boxes, or the places where we fill in information in the document form. These usually show as rectangular areas by default shaded in grey. The **Legacy Forms** available in Word 2007 are Text Form Field, Check Box form Field, Drop-down Form Field, Insert Frame, Form Field Shading and Reset Form Fields. In this session we will work with Text and Drop-down form fields.



Legacy Tools Button



Legacy Forms Grid

To edit a Form Field

Make sure that you are working in **Design Mode**. To do this left-click on the **Design Mode** button located on the **Controls** group option under the **Developer Tab** (you will see it highlight in orange). This will allow the user to work with edit boxes (the form fields or Content Controls) in the document.

1. The **Properties** button is used to set the behavior or options of the edit box. There are three ways of accessing the properties dialog box.
 - a. Left-Click on the Text Field (Grey Box). Right-click on the **Properties** button in the Controls group, **OR**
 - b. Right-click on the text field to select it and then click on the **Properties** button in the **Controls** group, **OR**
 - c. Left-Click on the Text Field (Grey Box) and press the applications key on the keyboard (the third key to the right of the spacebar) then click on **Properties**, **OR**
 - d. Double-click on the text field

Editing a Text Form Field for Text Input

Once the Properties box is opened, the Text Form Field Options dialogue box will be displayed. This box presents you with the different options that pertain to the text form field.

1. **Type** - you can set the type of text to be entered such as regular text, numbers, dates or calculations.
2. **Maximum length** – limits the number of characters to be entered.
3. **Default text** – allows you to set default text entries.
4. **Text format** – allows you to choose how the text will be displayed (uppercase, lowercase, first capital or title case).
5. **Field Settings** – bookmarks and names the edit box (in this case we are looking at Text box #2), this may be changed.
6. **Fill-in enabled**- allows data input into the box.
7. **Calculate on exit** – this is especially useful when creating a form that uses calculations such as adding or subtracting values in fields.

Text Form Field Options

Text form field

Type: Regular text Default text: |

Maximum length: 30 Text format: |

Run macro on

Entry: | Exit: |

Field settings

Bookmark: Text2

Fill-in enabled

Calculate on exit

Add Help Text... OK Cancel

Macros are a nice feature when you want to set additional behaviors, but are a little complicated and require more time to discuss.

A very nice little option to add to a form field is the Help Key (F1). This is especially useful to give instructions for filling out the forms and avoid confusion.

1. Click on the **Add Help Text** button located at the bottom left of the **Text Form Filed Options** dialogue box. This brings up the **Form Field Help Text** dialogue box with two tabs, **Status Bar** and **Help Key (F1)**.
2. **Status Bar tab** - allows you to make form filling instructions visible on the status bar located at the bottom of the Word application window (limited to 138 characters).
3. **Help Key (F1)** – Allows you to add form filling instructions and make them visible upon pressing the F1 key.
4. Press the **OK** button when done.

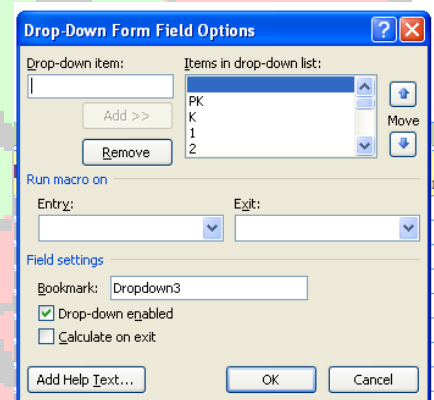


The Help Key options may be added to each form field through the properties button.

Editing a Drop-down Form Field

A drop-down menu allows you to restrict the selections that a user may choose. Access the form field's properties as discussed earlier. Once the Properties box is opened, the Drop-down Form Field Options dialogue box will be displayed. This box presents you with the different options that pertain to the drop-down form field.

1. **Drop-down item** - Enter a value into the **Drop-down item** text box and click **Add**. Do this for every selection that you wish to enter. If you wish to delete an entry, highlight the entry and click remove.
2. You may want to add empty space as the first item or perhaps wording such as **Choose an item** so that the first item of the field is not displayed.
3. The same instructions apply to the Text Form Field apply to the Drop-down Field.
4. Remember that the Help Key (F1) help may be added to this form field as well.
5. When you have finished adding the options click **OK**.

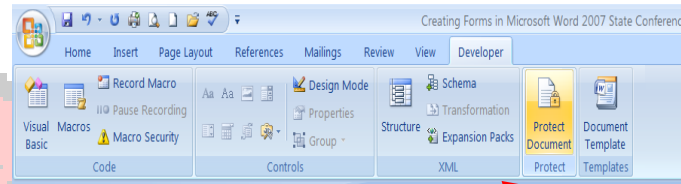


The form cannot be tested unless it is protected.

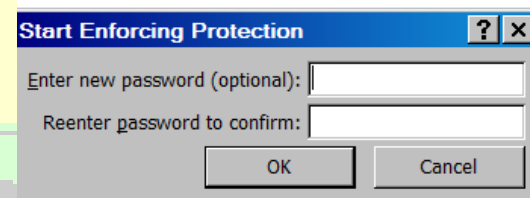
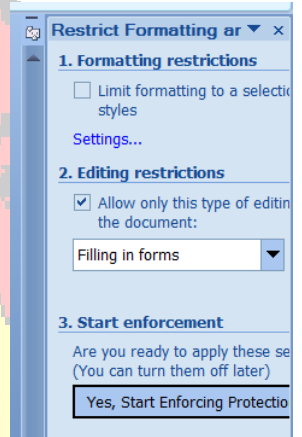
Protecting the Form

Once the design of the document form is complete, exit design mode by clicking on the **Design Mode** button in the Controls group of the **Developer** tab.

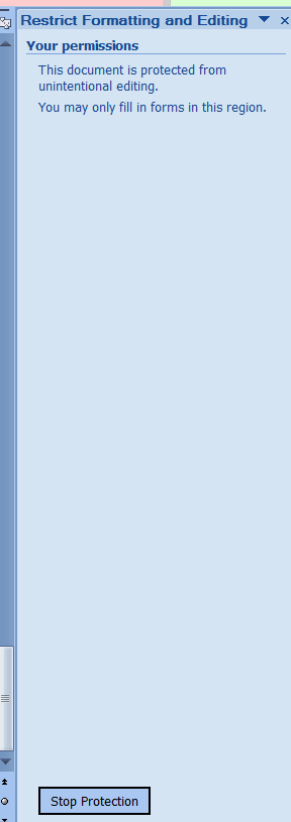
Protection cannot be set while in Design mode. The document may be protected through the **Review** tab as well as the **Developer** tab; both methods follow the same steps. We will continue to work off the Developer tab.



1. Click on the **Protect Document** button.
2. This will open the **Restrict Formatting and Editing** task pane.
3. Under option 2, **Editing restrictions**, check the **Allow only this type of editing in the document box**.
4. Click on the drop-down arrow and choose **Filling in forms**.
5. Click on the **Yes, Start Enforcing Protection** button.
6. The **Start Enforcing Protection** dialog box will open, type a password.
7. Reenter the same password in the next field.
8. Click the **OK** button.



The document is now protected. Be advised that if the password fields are left blank and the **OK** button is activated, protection will nevertheless be enforced. This is not advisable as anyone can stop the protection because a password will not be required.




To remove protection:

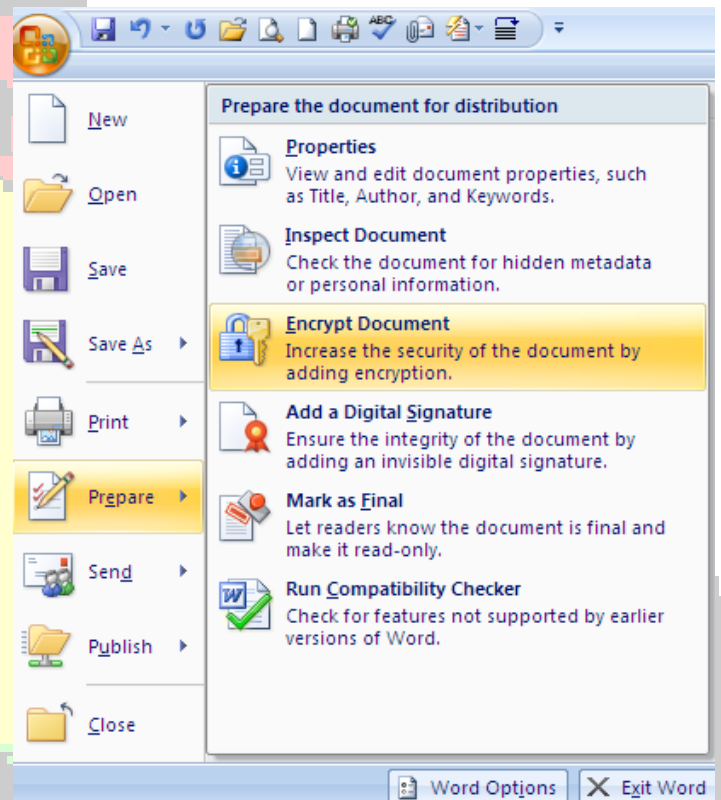
1. Open the **Developer** or **Review** tab.
2. Click on the **Protect Document** button.
3. The **Restrict Formatting and Editing** task pane opens.
4. Click on the **Stop Protection** button at the bottom of the task pane. If a password was not entered to enforce protection, nothing further is required, the document is now unprotected. If a password was entered at time of starting protection, that same password must be correctly entered to remove protection.

The document may be saved after protection is enforced.

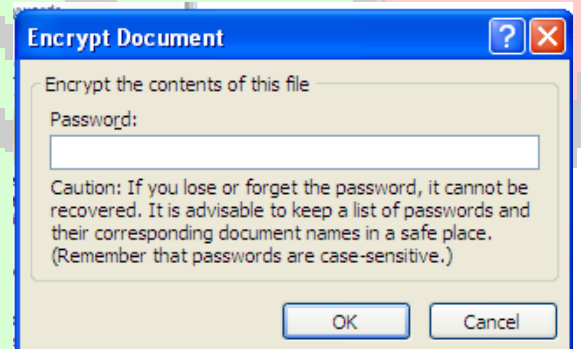
Encrypt the form before it is distributed via e-mail as it contains sensitive student information. Encryption provides protection against unauthorized access to the files. It is important to remember that password strength is equally as important as the password encryption algorithm used by Windows 7.

To encrypt your document in Word, Excel or PowerPoint 2007:

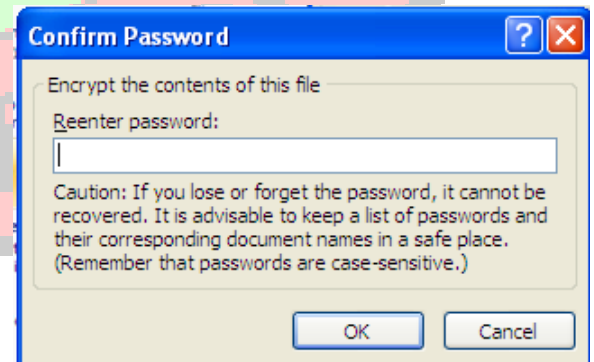
1. Click on the **Office Orb** 
2. Go to the **Prepare** section
3. Click on **Encrypt Document** in the submenu




The Encrypt Document dialogue box is displayed
Type in your password and click **OK**

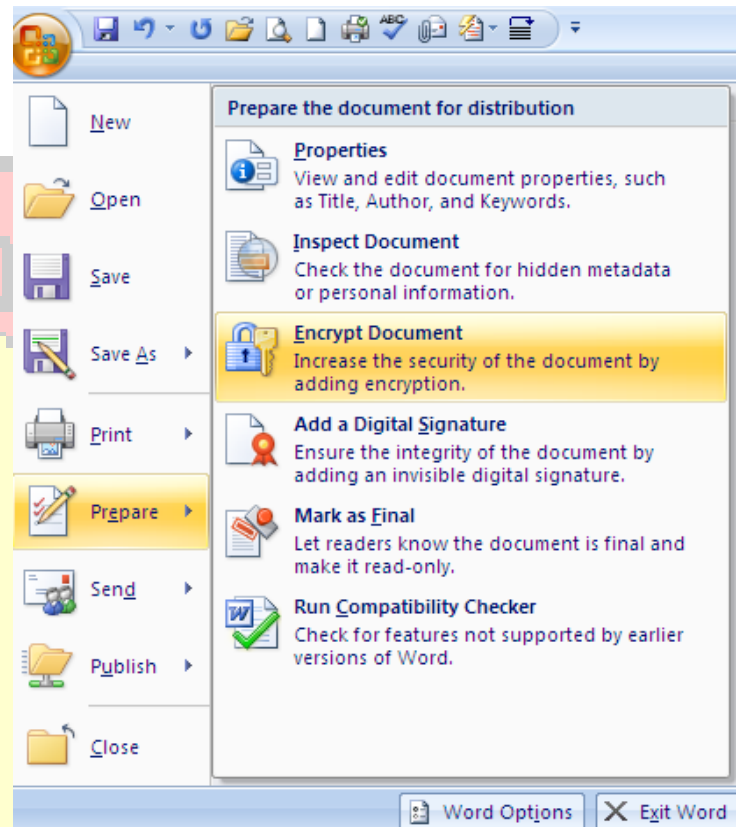


The Confirm Password dialogue box is displayed
Retype your password and click **OK**



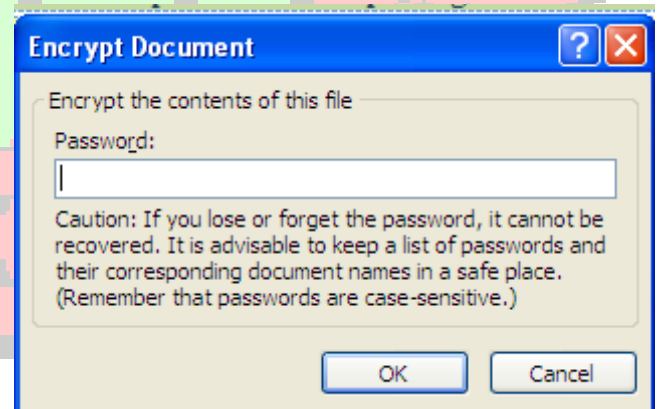
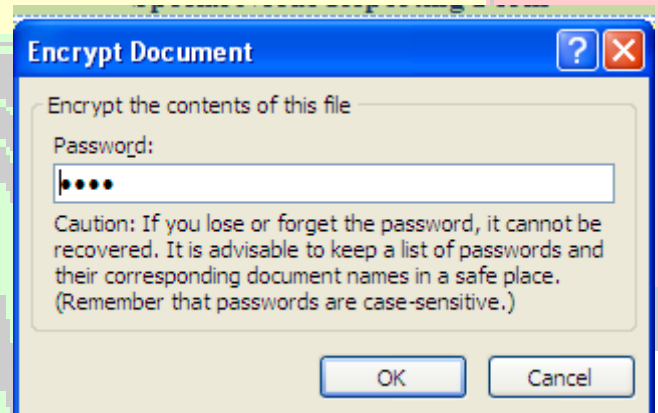
To decrypt, or remove password protection, to your document in Word, Excel or PowerPoint 2007:

1. Click on the **Office Orb** 
2. Go to the **Prepare** section
3. Click on **Encrypt Document** in the submenu




The **Encrypt Document** dialogue box is displayed showing round bullet marks

1. Delete your password by pressing the delete button until the password is completely erased
2. Click **OK**



Save the document upon closing or if it is a newly created document

1. Click on the **Office Orb** 
2. Click on **Save As**
3. Under **File name** type the name that you want to give your document.
4. Under **Save as type** click on the drop-down arrow and choose the file type that you want your document to be.
5. Click **OK**

The next time this document is accessed it will require a password to open.

1. Enter the password assigned to it.
2. Click **OK**

The document will now open.

