

Creating Forms in Word 2010

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You can create a form in Microsoft Word by starting with a template and adding content controls, including check boxes, text boxes, date pickers, and drop-down lists. Other people can use Word to fill out the form on their computer. In an advanced scenario, any content controls that you add to a form can also be linked to data.

You can also create a form by starting with a template. Many form templates are available on the Office.com Web site.

Note: You can print a form that was created by using content controls, but the boxes around the content controls will not be printed.

About printed forms and forms for use in Word

A form is a structured document with spaces reserved for entering information. You design the form, and others can fill it in on paper or in Microsoft Word. You can then compile the information you collected.

You can create a form in Microsoft Office Word by starting with a template you've created and adding content controls, including text boxes, date pickers, and drop-down lists. You can also create a form by starting with a sample template. Many are available on the Microsoft Office Online Web site.

Kinds of forms

You can create:

- A form that is printed and then filled in on paper. You can insert blanks for users to complete as well as check boxes that list choices, such as Yes and No.
- A form that users view and complete in Word. This form is distributed and collected by using e-mail or by posting it on a network location. You can use text fields, check boxes, and drop-down lists.

Designing a form

When designing a form, you can sketch a layout first, or use an existing form as a guide. Many forms, such as contracts, consist solely of text, with form fields inserted throughout the document so users can provide specific information. Other forms are based on a grid, in which you can combine features such as:

- Tables to help you align text and form controls: tables generally work well when you're creating a form with a simple layout. If the layout is more complex, you can insert several tables and separate them with blank paragraphs or use nested tables.
- Text boxes: these are useful when you want to precisely position a block of text, a graphic, or a chart. You can then format the text box borders, background color, text color, and so on.
- Borders and shading: these can designate text areas to be filled in and generally help make key elements in the form attractive and easy to follow.

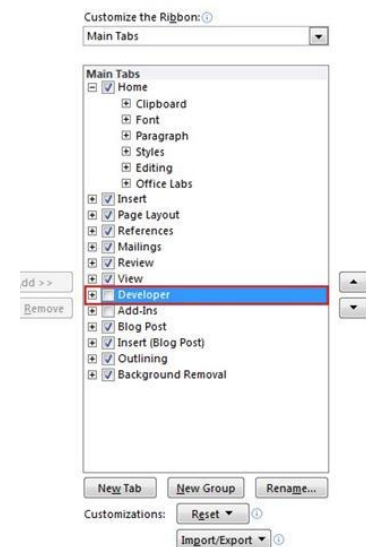
Create forms that users complete in Word

You need to complete several tasks to create forms for users to view and complete in Microsoft Word:

- Set up Word for creating forms.
- Open a template or a document on which to base the form.
- Design the form by sketching a layout first, or use an existing form as a guide.
- Add your form fields.
- Add protection to the form.
- Save the form, and then distribute it as you would any other document that you send for review.

Step 1: Show the Developer tab

- 1) Click the **File** tab.
- 2) Click **Options**.
- 3) Click **Customize Ribbon**.
- 4) Under **Customize the Ribbon**, click **Main Tabs**.
- 5) In the list, select the **Developer** check box, and then click **OK**.



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

To save time, you can start with a form template. Or you can start with a blank template and create your own form from scratch.

Start with a form template

- 1) Click the **File** tab / click **New** / under **Office.com Templates**, click **Forms**.
 - a) Click the folder that matches the type of form that you want to create.
 - b) Click the form template that you want to use, and then click **Download**.
- 2) Click the **File** tab again, and then click **Save As**.
 - a) In the **Save As** dialog box, type a name for the new template or document, and then click **Save**.

Start with a blank template

- 1) Click the **File** tab / click **New** / under **Available Templates**, click **My templates**.
- 2) Select **Blank Document**, if necessary / under **Create New**, click **Template** / click **OK**.
- 3) Click the **File** tab again, and then click **Save As**.
 - a) In the **Save As** dialog box, type a file name for the new template, and then click **Save**.

Step 3: Add content to the form

To add content to a Word 2010 form, you can use “content controls” and “legacy tools”. A good explanation of the differences between the two can be found at the following link: <http://msdn.itags.org/word/52534/>.

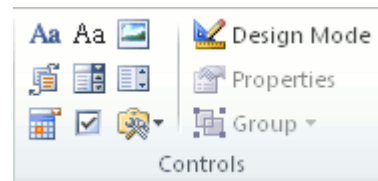
The Author of the first response, Jay Freedman, a Microsoft Word MVP, writes:

“The main advantage of the content controls is... that they can be bound to a data source such as an Access database or a web service. They can also be bound to XML in the document file, so that data entered in one content control can be automatically repeated by other content controls bound to the same XML node.”

For more information, please go to the webpage and read the entire posting.

Use Content Controls

- 1) On the **Developer** tab, in the **Controls** group, click **Design Mode**, and then insert the controls that you want.



Insert a text control where users can enter text

In a rich text content control, users can format text as bold or italic, and they can type multiple paragraphs. If you want to limit what users add, insert the plain text content control.

- 1) Click where you want to insert the control.
- 2) On the **Developer** tab, in the **Controls** group, click **Rich Text Content Control**  or the **Plain Text Content Control** .

Insert a picture control

A picture control is often used for templates, but you can also add a picture control to a form.

- 1) Click where you want to insert the control.
- 2) On the **Developer** tab, in the **Controls** group, click **Picture Control**.



Insert a building block control

You can use building block controls when you want people to choose a specific block of text. For example, building block controls are helpful if you're setting up a contract template, and you need to add different boilerplate text depending on the contract's specific requirements. You can create rich text content controls for each version of the boilerplate text, and then you can use a building block control as the container for the rich text content controls.



You can also use a building block control in a form.

- 1) Click where you want to insert the control.
- 2) On the **Developer** tab, in the **Controls** group, click **Building Block Content Control**.



Insert a combo box or a drop-down list

In a combo box, users can select from a list of choices that you provide or they can type in their own information. In a drop-down list, users can only select from the list of choices.

- 1) On the **Developer** tab, in the **Controls** group, click the **Combo Box Content Control**  or **Drop-Down List Content Control** .
- 2) Select the content control, and then on the **Developer** tab, in the **Controls** group, click **Properties**.
 - a) To create a list of choices, click **Add** under **Combo Box Properties** or **Drop-Down List Properties**.
 - b) Type a choice in the **Display Name** box, such as **Yes, No, or Maybe**.
 - a) Repeat this step until all of the choices are in the drop-down list.
- 3) Fill in any other properties that you want.

Note: If you select the **Contents cannot be edited** check box, users won't be able to click a choice.

Insert a date picker

- 1) Click where you want to insert the date picker control.
- 2) On the **Developer** tab, in the **Controls** group, click the **Date Picker Content Control**.



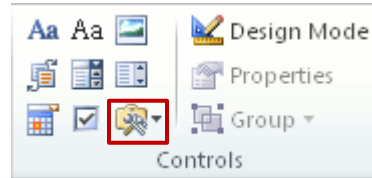
Insert a check box

- 1) Click where you want to insert the check box control.
- 2) On the **Developer** tab, in the **Controls** group, click the **Check Box Content Control**.




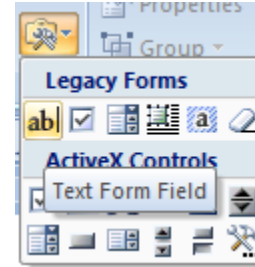
Use Legacy Tools

- 1) In the document, click where you want to insert the form field.
- 2) Do any of the following:

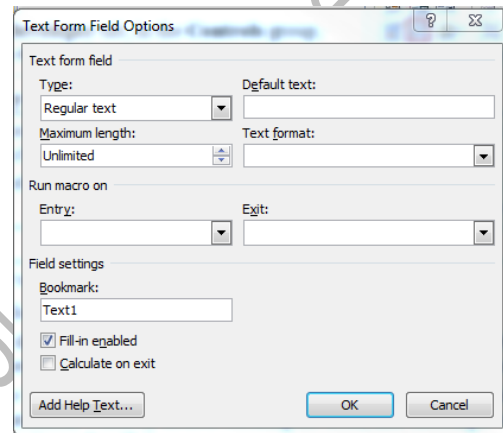


a) Insert a fill-in field where users can enter text


- Click the **Legacy Tools** button, click **Text Form Field** .
- If desired, double-click the field to open the Text Form Field Options dialog box. For example:



- (1) You can specify a default entry so that the user does not have to type an entry except to change the response.
- (2) To limit the amount of information a person can type in the field, enter a maximum width value under **Maximum length**.




b) Insert a check box next to an independent option that users select or clear

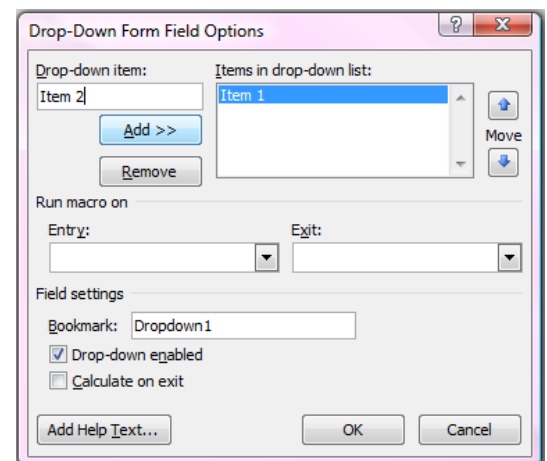
- Click the **Legacy Tools** button, click **Check Box Form Field** .

- (1) You can also use this button to insert a check box next to each item in a group of choices that are not mutually exclusive — that is, users can select more than one.

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

- Click the **Legacy Tools** button, click **Drop-Down Form Field** .
- To make changes to the drop down field, double-click the drop-down form field.

- (1) The **Drop-Down Form Field Options** box appears.
- (2) **To add an item**, type the name of the item in the Drop-down item box, and then click **Add**.
- (3) **To remove or change the order of items** in a drop-down list form field do any of the following, and then click **OK**:
 - (a) **To delete an item**, click the item in the “Items in drop-down list” box, and then click **Remove**.
 - (b) **To move an item**, click the item in the “Items in drop-down list box”, and then click the **Move** arrow buttons.



Note: The first item in the **Items in drop-down list** box is the one that appears by default in the drop-down list. To move the most frequently selected item to the first position, use the **Move** arrow buttons.

3) If necessary, edit the appearance of the fields. Do any of the following:

a) **Change the formatting of form field results:**

- Select the form field you want to format.
- Select the options you want from the **Home** tab on the Ribbon.

b) **Display or remove shading:**

- Click **Form Field Shading**  button in the **Legacy Tools**.

Note: The shading appears on the screen so users can quickly identify the fields they need to respond to. This shading does not print.

- To **add shading to a printed form**, select the form field you want to emphasize, and then click **Shading** (**Home** tab / **Paragraph** group).

Step 4: Set or change properties for content controls

As noted in some content control instructions above, 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) Click the content control that you want to change.
- 2) On the **Developer** tab, in the **Controls** group, click **Properties**, and change the properties that you want.
 - a) If you used **Legacy tools**, double click the control to access that field's properties.

Microsoft Word controls common properties:

- **Titles** – Each control can have an optional user-friendly title displayed when the control is edited.
- **Tags and IDs** – If you're developing a solution based on Word 2007, each of these controls can have a document-level unique ID that can be used to uniquely identify it, as well as an optional tag string.
- **Locking** – Each of the controls supports a granular set of locks (preventing deletion of the control itself and/or preventing the content from being edited).
- **Placeholder Text** – The instructional text displayed when the control is blank can be customized into whatever you want (both text and formatting).

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) 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.

Step 6: Protect parts of a form

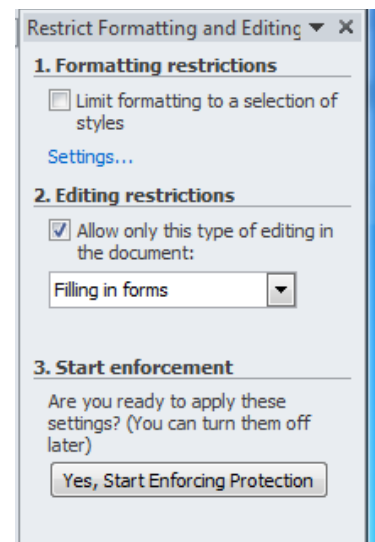
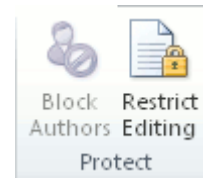
You can protect individual content controls in a form template to help prevent someone from deleting or editing a particular content control or group of controls.

- 1) Open the form that you want to protect.
- 2) Select the controls to which you want to restrict changes.
- 3) To apply protection to a group of controls, select the controls by pressing CTRL and clicking each control that you want to group.
- 4) On the **Developer** tab, in the **Controls** group, click **Group**, and then click **Group**.
- 5) On the **Developer** tab, in the **Controls** group, click **Properties**.
 - a) In the **Content Control Properties** dialog box, under **Locking**, do either of the following:
 - 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.
 - 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.

Step 7: Prepare a form to be filled out

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.

- 1) Open the form that you want to lock so that it can be filled out.
- 2) On the **Developer** tab, in the **Controls** group, make sure that **Design Mode** is turned off.
- 3) On the **Developer** tab, in the **Protect** group, click **Restrict Editing**.
- 4) In the **Restrict Formatting and editing** task pane, under **Editing restrictions**, select the **Allow only this type of editing in the document** check box.
- 5) In the list of editing restrictions, select **Filling in forms**.
- 6) Under **Start enforcement**, click **Yes, Start Enforcing Protection**.



- 7) If you want 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.
- 8) If you don't want to assign a password to the document, leave the password boxes blank, and click **OK**.

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

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.

