
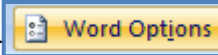
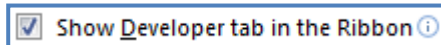


Creating Forms in Microsoft Word 2007

Introduction

In Microsoft Office 2007 Word forms are now listed under “**Legacy Tools**”, in the Developer / Controls section. In order to access it you have to elect to display Word's Developer tab.

- To do this, click the Office Button. → 
- Then “**Word Options**”. → 
- Click Popular, then check the box for "**Show Developer tab in the Ribbon.**"





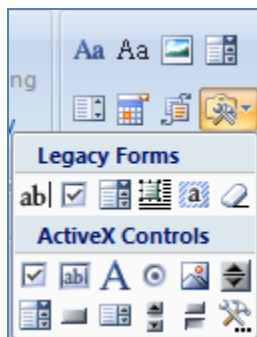
A form is a special type of document in which the user can only type within certain areas. The remainder of the document is protected and cannot be modified in any way. Whether the form is filled in online or printed on paper, you can arrange it so that the layout cannot be altered.

When completed online, forms allow the user to move directly between the answer boxes using the *Tab* key. As well as being able to type in their answers, they can also click on check boxes or select from pre-set answers provided by a drop-down list. You can also check the validity of answers and can run a macro (e.g. to give additional instructions) on entering a box or on leaving it.

Creating a Form in Word 2007

Start your form on a new blank document:

1. Start Microsoft Word or, if already running, click on the [Office Button] and select “**New**”. →  
2. Type in a main heading for your form - e.g. **Job Application**
3. Using the [Style] button, change the style to **Heading 1** and [Center] if you prefer
4. Press <Return> *twice* then type the instructions for completing the form - e.g. **Please fill in the form below, clicking on the option boxes or using the drop-down lists where these are provided.** (press <Return> *twice*)
5. To display the *Legacy Forms* ribbon open the **Developer** tab, and under **Toolbars** then **Legacy Forms**



The *Legacy Forms* Toolbar is the key to producing a form. The buttons allow you to add text boxes, check boxes and drop-down lists boxes to your document.

6. Type your first *question* (e.g. **Name** :) then press <Tab>
7. Now click on the first button on the *Legacy Forms* toolbar ([**Text Form Field**]) - a grey box will appear ready for the user to type in his/her own name
8. Press <Return> twice then repeat steps 7 and 8 for the second question (e.g. **address** :)
9. Repeat step 9 for the third question (e.g. **Date of Birth** :)

Next, try adding check boxes (the second button on the *Legacy Forms* toolbar):

11. Press <Return> twice then type the fourth question (e.g. **Gender** :)
12. Press <Tab> then type **male** followed by *three* spaces
13. Click on the [**Check Box Form Field**] button - a small grey box appears
14. Press *five* spaces then type **Female** followed by *three* spaces
15. Repeat step 13 for a second check box

Finally, add a drop-down list box (the third button on the *Legacy Forms* toolbar):

16. Press <Return> twice and type the fifth question (e.g. **Nationality** :)
17. Press <Tab> then click on the [**Drop-Down Form Field**] button - another grey box appears

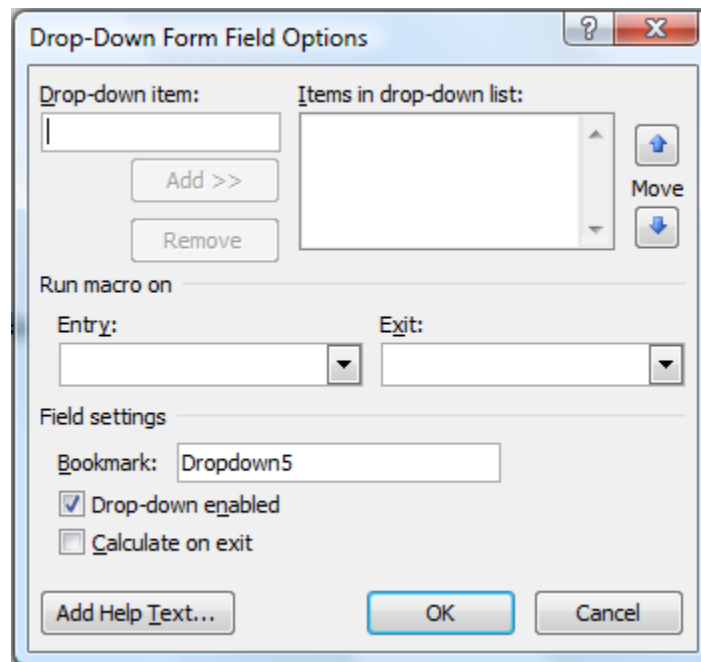
Note: Drop-down lists are only of use on a form which is being filled in online.

Setting Values for a Drop-Down List

To set the values you want to appear in the drop-down field:

1. Make sure the current typing position is against the drop-down box (it should already be so)
2. Click on the [**Form Field Options**] button - the fourth on the *Legacy Forms* toolbar

The following window will appear:



3. Type in the first *Drop-down item* (e.g. **British**) - press <Return> or click on [**Add** ► ►]
4. Repeat step 3 for the second list item - e.g. **European Community**
5. Repeat step 3 for the third list item - e.g. **Other**

Note that you can amend the list order by first selecting a list item and then using the *Move* arrows. A selected item can also be deleted from the list using the [**Remove**] button.

6. Make sure under *Field settings* that the **Drop-down enabled** check box is ticked then press <Return> or click on [**OK**]

You have now created your drop-down list. Anyone filling out the form online *must* select from this list - they cannot type in another value.

Tip: The first item in a drop-down list appears as the default value. If you want to display an empty box, create an extra blank list item as the first entry in the list. You must type at least one character to create the list item (e.g. a *space*). Use several *spaces* to widen the box.

Turning Off Shading and Adding Formatting

Currently the boxes are all shaded grey. If the form is being filled in online then the shading is unnecessary; even for a printed form, it's better to provide an outlined box. It's very easy to turn off the shading:

1. Click on the [**Form Field Shading**] button - the last but one on the *Legacy Forms* toolbar

The grey shading should now have disappeared. To turn it on again (if you prefer that) simply click on the [**Form Field Shading**] a second time.

To add a format to an answer field:

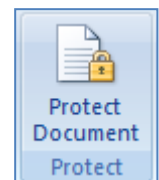
2. Select the form field to be formatted then apply the formatting - e.g. click on the [**Italic**] button to make the *Nationality* drop-down box italic

Other formatting you might want to change includes the font (and font size) and justification (e.g. in a table, you might want numbers to line up on the right).

Activating the Form

Though you created a drop-down list, the form is not yet activated and so the list items do not show. A form becomes active once it has been *protected*. You can then only type in the form fields themselves and cannot make any changes to the existing text:

1. Click on the [**Protect Form**] button on the far right of the *Legacy Forms* toolbar



You should find that the drop-down list arrow now appears.

2. Select a value from the drop-down list then press <Tab>

You'll find you jump straight to the first (*Name*) question on your form.

3. Fill out the form, pressing <Tab> each time to move between the fields

4. When typing in your *Address* separate each line by a comma - **do not** press <Return>
5. With a check box, either type an **x** (a <space> unsets it) or click on it using the mouse
6. Having tested out the form, click on the **[Protect Form]** button *twice* - this will clear any entries you have made

Checking Date Entry

You can check for valid data entry in a *Text* Field and can specify how you want the data to appear on the form. On the current form, for example, you can check that a date is being entered against *Date of Birth*:

1. First you need to unprotect the form - click on the **[Protect Form]** button
2. Move the typing position to the *Date of Birth*: text form field (at 3.5cm)
3. Click on the **[Form Field Options]** button - the fourth on the *Legacy Forms* toolbar

The following window will appear:

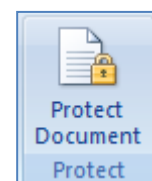
4. Using the *list arrow* attached to *Type*:, change this option to **Date**

Note the other available types - you can restrict entry to numbers, for example, or can automatically set this to pick up the current date or time.

5. Using the *list arrow* attached to *Date format*:, change this option to **d MMMM yyyy**
6. Press <Return> or click on **[OK]** to close the *Text Field Options* window

This will automatically convert any date entered into a format showing the month and year in full (e.g. 25 January 2003).

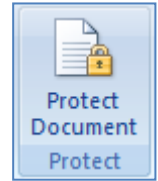
7. Click on the **[Protect Form]** button then press <Ctrl S> to save the changes to the document.



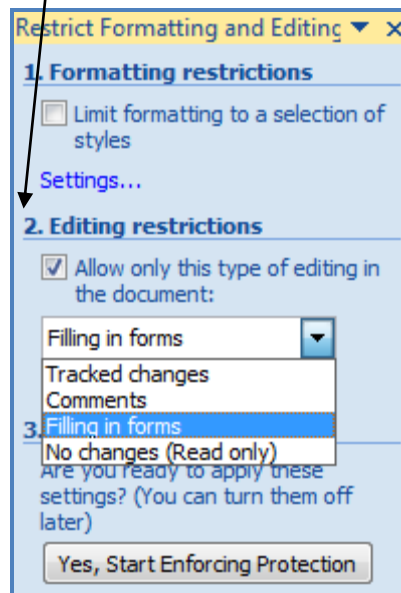
8. Try typing **help** against *Date of Birth* then press <Tab> - an error message should appear
9. Type in a date in an abbreviated form (e.g. 12/12/82) then press <Tab> - it should be converted to the long format (e.g. **12 December 1982**)

Protecting a Form

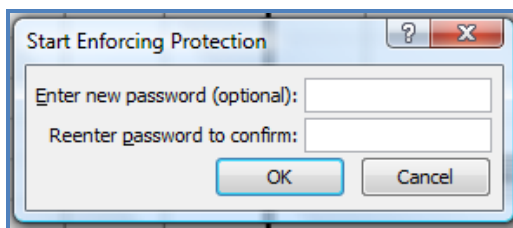
Though you have already protected your form, anyone with a good knowledge of Word could easily unprotect it. To make certain this doesn't happen you need to *password protect* it. To do this:



1. Click on the **[Protect Form]** button to unlock your form document
2. Click on the **[Protect Form]** button again and the following window appears on the right pane of Word 2007
3. Place a checkmark on "Editing restrictions" and select '**Filling in forms**'.

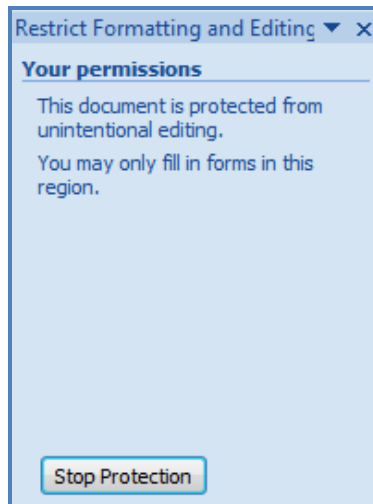


3. Click on the 'Yes, Start Enforcing Protection' button.
4. Against *Password (optional)*: type in a password – (e.g. job, ...)



It's important you don't forget a file's password otherwise you'll never be able to make changes to it in future.

5. Confirm the password and click on **[OK]**
6. Press <Ctrl S> to save the document - note that *Protect Form* is already on
7. Try unlocking the form - i.e. click on the **[Protect Form]** button and in the right-pane the following screen appears.



If you were not the creator of the form, you would not know the password and so would not be able to unlock it.

8. Click on [**Cancel**] then [**Close**] the new document - there's no need to save it
9. Click on the [**Protect Form**] button to redisplay the *Unprotect Document* window
10. This time, click on the '**Stop Protection**' window and type in the password (i.e. **job**) - to unlock the template)
11. Click on [**OK**]
12. Finally, press <Ctrl S> to save the document then [**Close**] it