

Lesson 1 Creating Forms

Creating Forms

You can create fillable forms in Word 2013 and beyond that can be used to collect information, and when building your form, you can add a variety of tools to assist with data collection (1).

	
Recent Photograph:	
Name: Scrappy Owl	
Sex: Male ☒ Female ☐	Birth Date: 10/9/1963
Address: 1000 Chastain Point	Major: Communications
City: Kennesaw	Graduated: ☒
State: Georgia	Currently Employed: ☒
Zip: 30144	How did you hear about us? Magazine

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Once your forms to complete, you can then save it as a template, so that the user fills in a copy and the original (template) does not change. This section on Creating Forms will explain how to re-create the Example Form above.

Enable the Developer Tab

Before you can begin creating your form you will need to make sure the **Developer tab** is displayed in your **Ribbon (2)**. The **Developer** Tab contains the tools necessary to create your form.



If you do not see the Developer tab, follow the steps below to activate it:

1. **Right-click** on any **blank** area of the **Ribbon**.
2. A *context sensitive* menu will appear. Click on **Customize** on the Ribbon.(3).



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3. The **Word Options - Customize the Ribbon** window will appear. In the *right list*, **check** the box for the **Developer**. (4)



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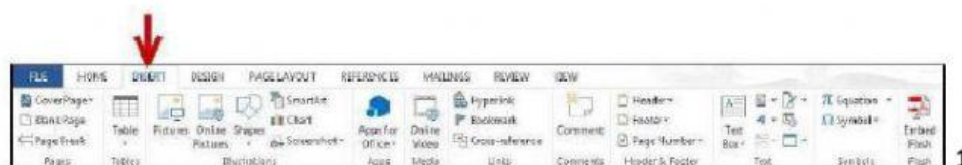
4. Click on **OK**. The **Developer Tab** will be added to the **Ribbon**.

Beginning your Form

The easiest way to create fields for your form is to create a table, then Insert the section of your form.

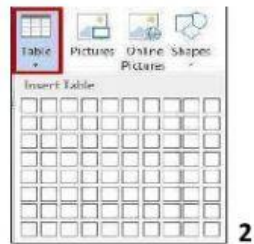
The following will show how to begin your form

1. Click on the **Insert** tab (1).



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2. Click the **Table** icon . A *dropdown* menu with additional options will appear.(2)



3. Under **Insert Table**, move your *mouse pointer* over the boxes until you have the number of rows and columns that you require in the **table**.
4. Click to confirm your **table**.
5. Your *table* will be placed within your **document**.

Inserting Content Controls

By Inserting *Content Controls* into your document, you can control what type of information users can (or should) enter into the form. The following content controls will be covered (3).

	Rich Text Content Control	Text can be formatted and saved (e.g. Bold , <i>Italics</i>)
	Plain Text Content Control	Text cannot be formatted (e.g. plain text)
	Picture Content Control	Allows a picture to be uploaded
	Check Box Content Control	Inserts a checkbox
	Combo Box Content Control	Contains a list of choices that can be updated by the user
	Drop-Down List Content Control	Contains a list of restricted choices
	Date Picker Content Control	Contains a calendar. User can type a date, or select from the calendar

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To **Insert** a *content control* into your form:

1. Click to place your **cursor** on the form where the *content control* will be inserted.
2. Click the **Developer** tab (4.)



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3. In the **Controls** group, click the *content control* that you want to **Insert**.

Replacing Instructional Text

All content controls contain “instructional” text that indicate what the end user is to do with the control **(1)**. Whenever the user enters information into a content control, the instructional text is automatically replaced.

Name: Click here to enter text.
Sex: Male ☐ Female ☐
Major: Choose an item.
City: Click here to enter text.
State: Click here to enter text.
Zip: Click here to enter text.

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To change the instructional text that appears in the content control:

1. Click the **Developer** tab,(2)



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2. Click on **Design Mode** in the **Controls** group. (3).



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3. The **content controls** in your document will enter **design mode**.(4)

Name: Click here to enter text.
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4. Click the *control* to edit.
5. Type in the **new** text.
6. When finished *editing*, click on **Design Mode** in the **Controls** group.
7. Your *edits* will be applied. (5)

Name: Type Last name, First name.
Sex: Male ☐ Female ☐
Major: Select one option.
City: Type in your City.
State: Type in your State.
Zip: Type in your 5-digit Zip Code.

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Setting Content Control Properties

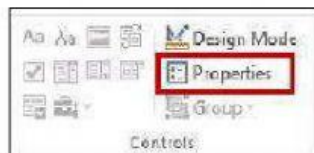
After inserting a content control, you may need to alter certain properties for that control. e.g. After inserting a *drop-down* content control, you will need to access the properties so you can add choices to the drop-down list. The following explains how to access the content control properties.

1. Click on the **Content Control** you wish to alter properties for :-
2. Click the **Developer** tab. (1),



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3. Click on **Properties** in the **Controls** group (2).



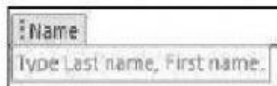
2

4. A *properties* window will appear. The options under **General** and **Locking** are available for most content controls (3).



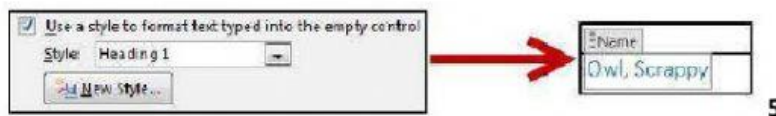
3

5. Typing text in the **title field** will display the text over the content control when selected. (4).



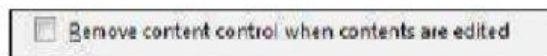
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6. Checking **Use a style to format text typed into the empty control** allows you to select a Style from the drop-down list that will be used to format the text which the user enters into the field (5).



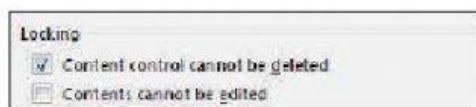
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7. Checking **Remove content control when contents are edited** will make the content control disappear once the user has entered information, leaving just the text (6).



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8. Checking **Content control cannot be deleted** prevents the content control from being deleted while the form is being created or edited. (7)



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Note: Controls cannot be deleted by the end user once the form is protected. See Lock and Restrict your form for more information.

9. **Checking Contents cannot be edited checkbox** prevents the instructional text from being changed while the form is being created or edited.

Make sure the Contents cannot be edited checkbox is not checked when it is distributed to end users.

10. After making your selections, click on **OK**.

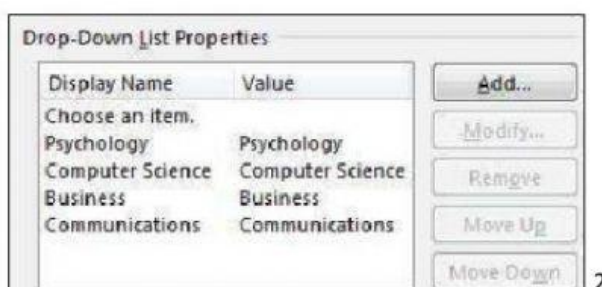
Rich Text Plain Text Properties.

Rich text/Plain text content controls have additional options for allowing multiple paragraphs. With this option selected, users will be able to enter multiple lines of text. (1)



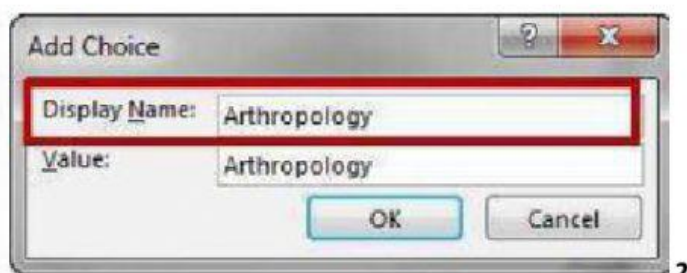
Combo Box and Drop-down List Properties

When adding combo box and drop-down lists context controls, you will need to enter the properties for these controls in order to add the choices users will select from the list. (2)



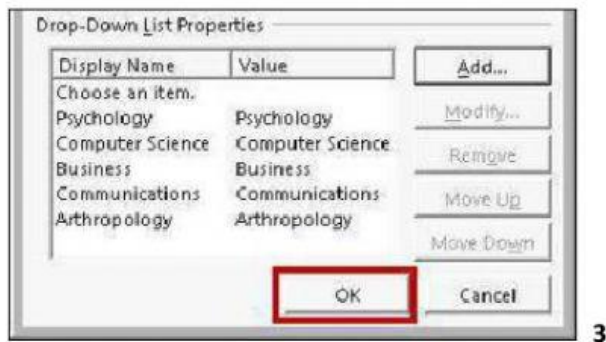
To add entries to the combo box/drop-down list:

1. Click the **Add** button.
2. The **Add Choices** window will open in the display Name field, enter the name of your list item (2).



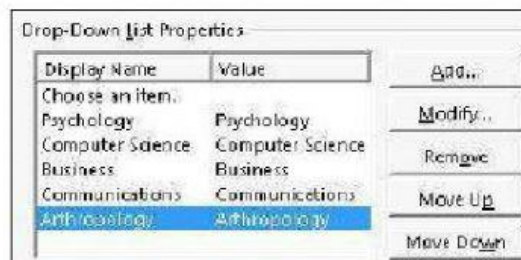
Note: The **Value field** will automatically fill when the *Display Name Field* is entered.

3. Click the **OK** button.
4. **Repeat** steps 1-3 to add more values to your list.
5. When finished adding values, click the **OK** button in *Content Control Properties* window. **(3)**



To edit existing entries in the combo box/drop-down list:

1. Select a value from the *Drop-Down List Properties* (1).



2. Click the **Modify** button to edit the selected value.
3. Click the **Remove** button to delete the selected value.
4. Click the **Move Up/Move Down** to reposition the value within the list.
5. When finished making your edits click the **OK** button.

Questions

1. Give the steps of how to create a form.

2. How do you Set Content Control Properties?

3. Give the steps to edit Combo box/drop down properties.