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Webinar Handout



Microsoft Word:
Tables and Fillable
Forms
August 21, 2019

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Fillable Forms

This lesson will show you how to replace your paper forms and make a fillable form in Microsoft Word. Completed forms can be emailed as an attachment or printed. Using Microsoft Word's fillable forms give you control over the types of responses the user may provide. Restrict answers to selections by adding controls including text boxes, date and calculated fields, checkboxes, and drop-down lists. The information gathered can be exported from the completed form to an Excel spreadsheet.

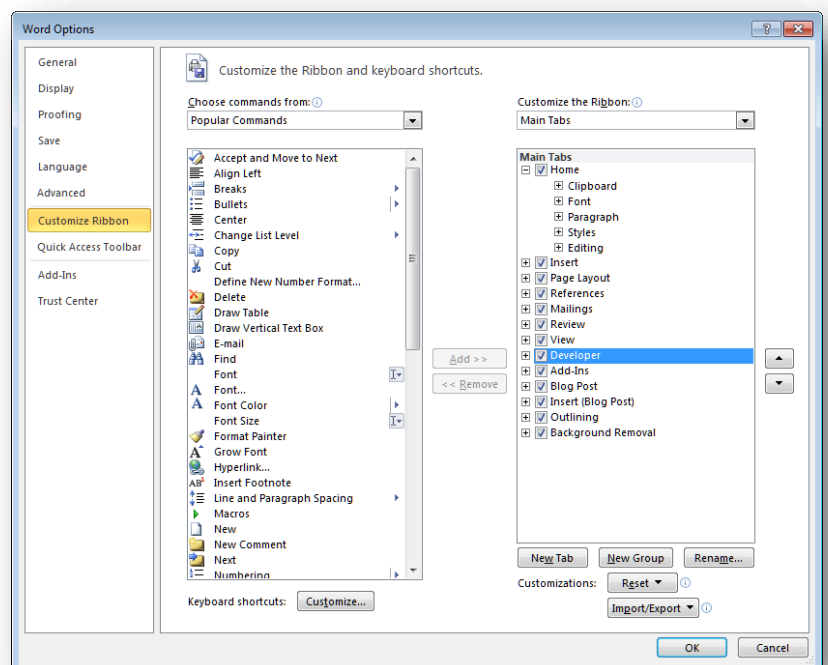
Show the Developer tab on the Ribbon

The Developer tab contains the controls required for creating a fillable form. To ensure the tab is visible complete the following:

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

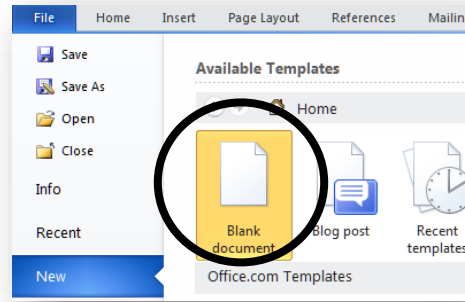
Open a Template or a Document on which to Base the Form

To start a form from scratch, start with a blank document and create the form using tables. To save time, start with one of Microsoft Word's form templates.



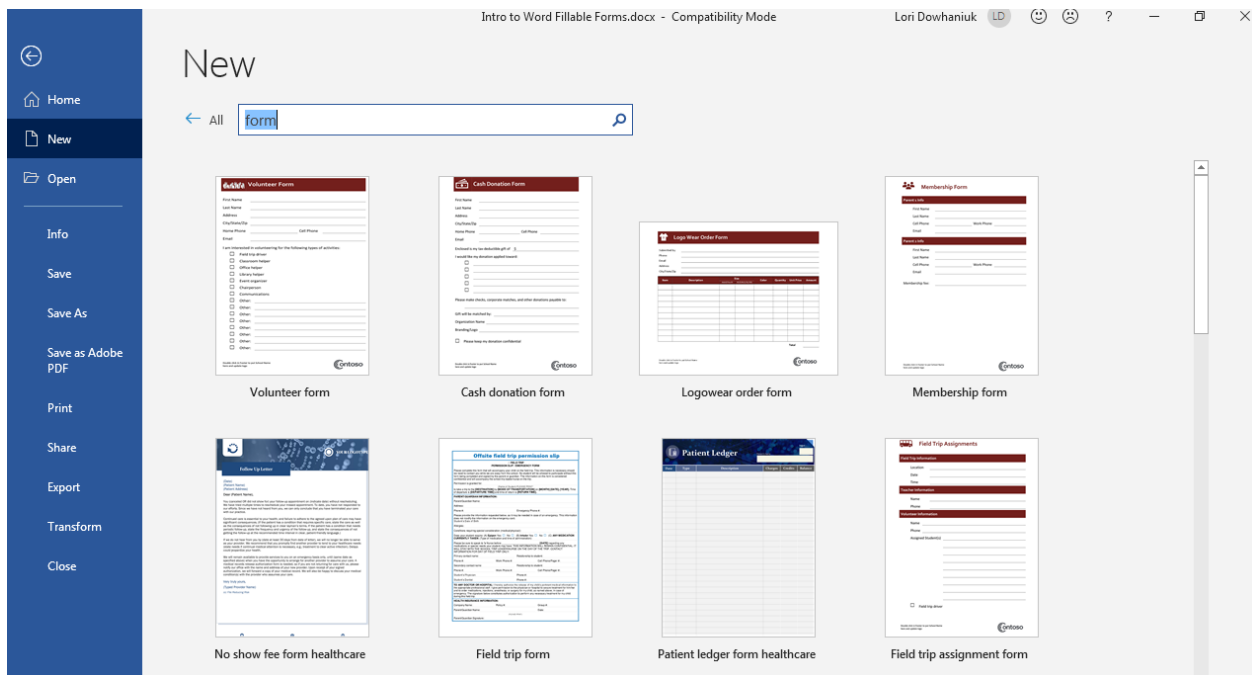
1. Start with a blank document.

- a) Click the **File** tab.
- b) Click **New**.
- c) Click **Blank document**.



2. Start with a form template

- a) Click the **File** tab.
- b) Click **New**.
- c) Type in the search bar the category of template you want to use eg. form. Click on the desired template




- d) The following screen will show a preview of the selected template. Click **Create**.

Employment application (online)

Provided by: [Microsoft Corporation](#)

Have job applicants type their information online into this application form template. Sections include applicant information, education, references, previous employment, and military service.



Create

- e) A blank document based on the template will appear on your screen. Fill in the desired default company information.

YOUR LOGO
HERE

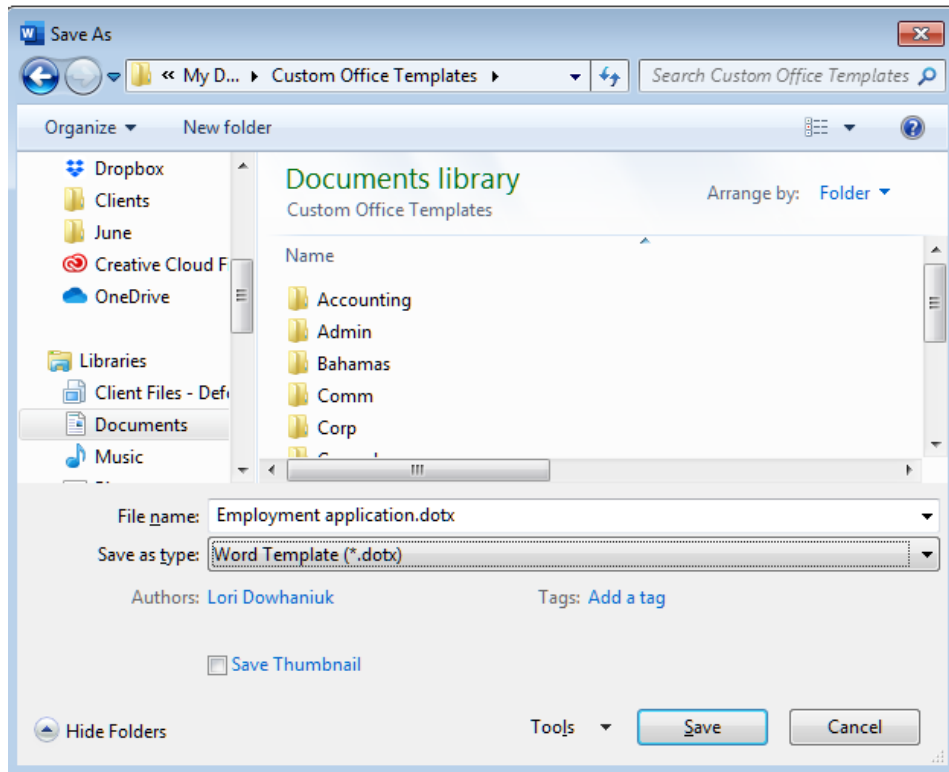
Company Name

Employment Application

Applicant Information

Full Name:		Date:	
	<i>Last</i> <i>First</i> <i>M.I.</i>		
Address:			
	<i>Street Address</i>	<i>Apartment/Unit #</i>	
	<i>City</i>	<i>State</i>	<i>ZIP Code</i>
Phone:	Email:		

- f) Save as a Word template in the Template folder of Word.

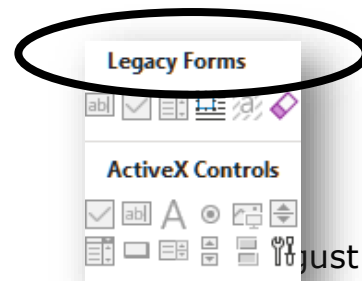
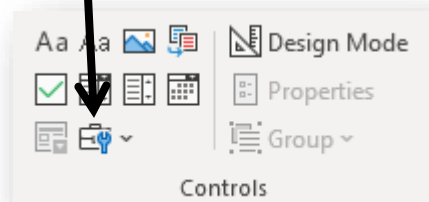


Add content controls to the form

To add content to a form, you can use content controls and legacy tools. 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. The advantage of the legacy tools is the user can use the Tab key to move to the next control, and you can easily create calculated fields. This lesson will use the legacy tools.

1. Accessing the Legacy Tools Form Controls

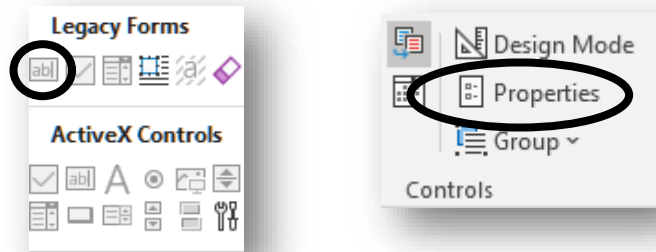
- a) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button.
- b) This will give you a dropdown toolbar of options for **Legacy Forms** controls.



Note: You will want to only use the controls shown under **Legacy Forms**, not the controls under ActiveX Controls.

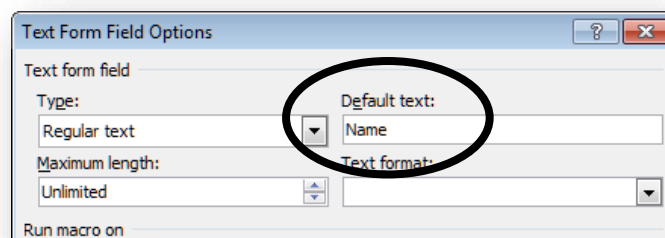
2. Insert a Text Form Field where users can enter text or numbers:

- a) Click to place the cursor where you would like to insert the text form field.
- b) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button and click on the **Text Form Field** control. A field will appear at the cursor position.
- c) To set the default text, with the cursor still in the Text Form Field just inserted, click the **Properties** button.

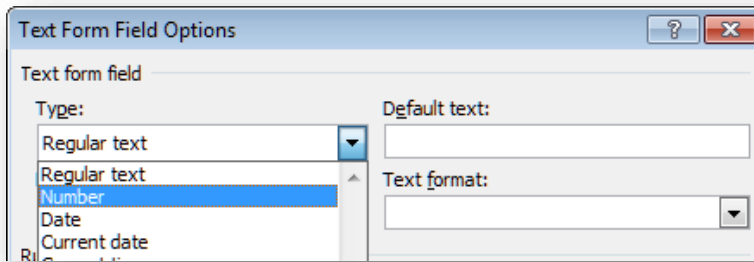


Note: You can also double-click on the field as a short-cut to access the options.

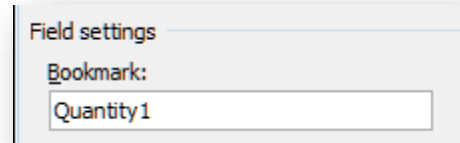
- d) Type the desired text in the **Default text** field.



Note: The Text Form Field properties are also used to change the type of field to Number for inputting numbers.

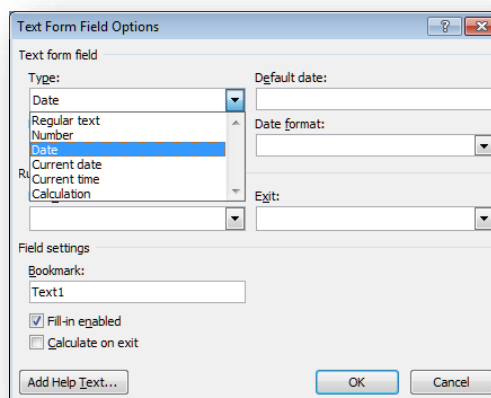


If the number field is going to be used in a calculation, assign a unique bookmark or name for the field.

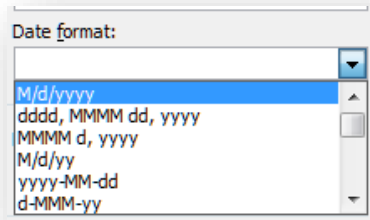


3. Insert a Date Field to force users to enter a date value:

- a) Click to place the cursor where you would like to insert the date field.
- b) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button and click on the **Text Form Field** control.
- c) With the cursor still in the Text Form Field just inserted, click the **Properties** button.
- d) Under **Type**, select **Date**.



- e) For the **Date format**, select the desired date format to use in displaying the date entered by the user on the form.

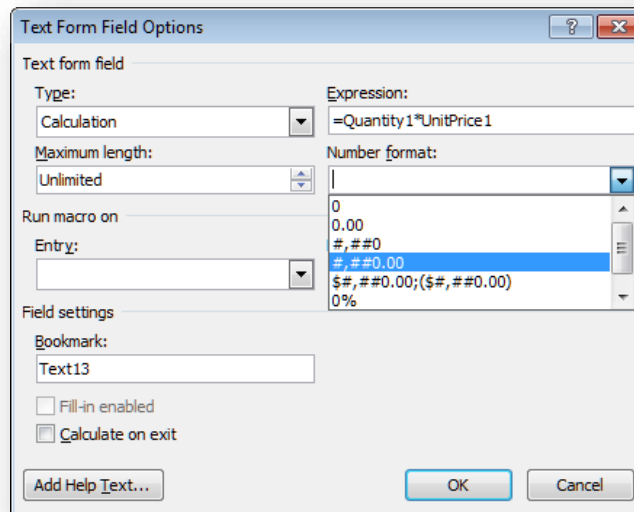


Note: If you would like to automatically have the field place the current date on the form, select **Current date** as the type.

4. Insert a Calculation Field:

A text form field can be used to perform a calculation in which the result is based on the value in other form fields.

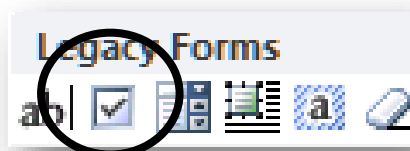
- a) Click to place the cursor where you would like to insert the calculation field.
- b) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button and click on the **Text Form Field** control.
- c) With the cursor still in the Text Form Field just inserted, click the **Properties** button or double-click on the field as a shortcut.
- d) Set the Type to **Calculation** and enter the desired formula in the **Expression** field. Change the **Number format** as desired and click **OK**. Check **Calculate on exit** for the fields to calculate when the user exits the field.



Note: All formulas begin with an equal sign. To specify values in a table you can use cell references where "A" is the first column in the table and "1" is the first row in the table as in Excel. For example =sum(a2:a5) or =b2-b3 or =b2*5%. You can also use =sum(above) to total a column. An asterisk (*) is used to indicate multiplication and a slash (/) is used to indicate division. If you used bookmarks or names for your fields you can use those names in the formula i.e. =Quarterly1* UnitPrice1

5. Insert a Check Box:

- a) Click to place the cursor where you would like to insert the check box.
- b) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button and click on the **Check Box Form Field** control.



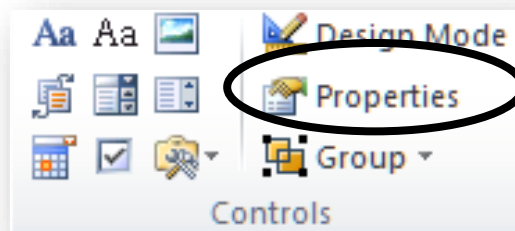
Note: You won't be able to select or clear the check box until you protect the form. Once protected you can either press the X key or spacebar to check or click the mouse in the box.

6. Insert a Drop-Down List that restricts available choices to those you specify:

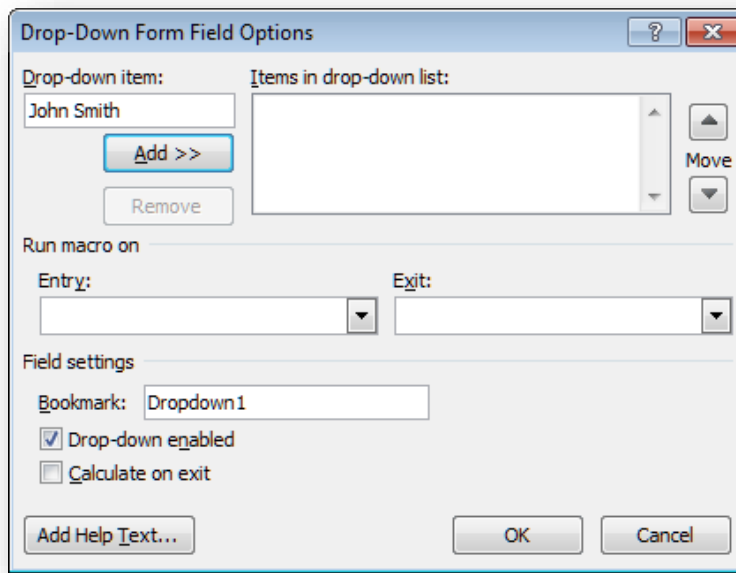
- a) Click to place the cursor where you would like to insert the drop-down list.
- b) On the **Developer** tab, in the **Controls** group, click the **Legacy Tools** button and click on the **Drop-Down Form Field** control.



- c) With the cursor still in the drop-down field just inserted, click the **Properties** button.



- d) For the **Drop-down item**, type the desired item you would like to appear as an option.
- e) Click **Add >>**.
- f) Repeat Steps d-e until all desired choices appear under **Items in drop-down list**.
- g) Use the **Up** and **Down** buttons to move the items in the list and change the order. Click **OK**.



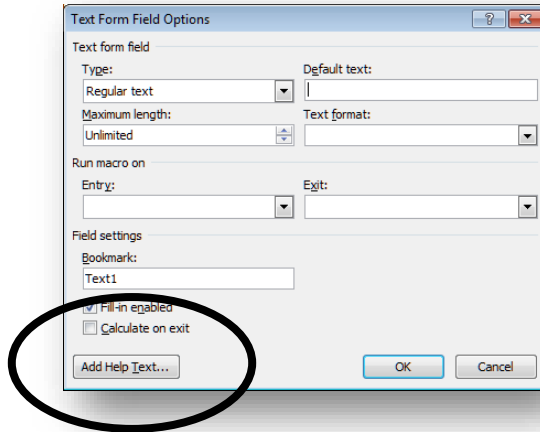
Note: The field won't appear as a list until you protect the form. Once protected you can either click the drop-down arrow or press Alt+ the down arrow key on the keyboard to display the list and click on the desired choice.

Add Help Text to the Form

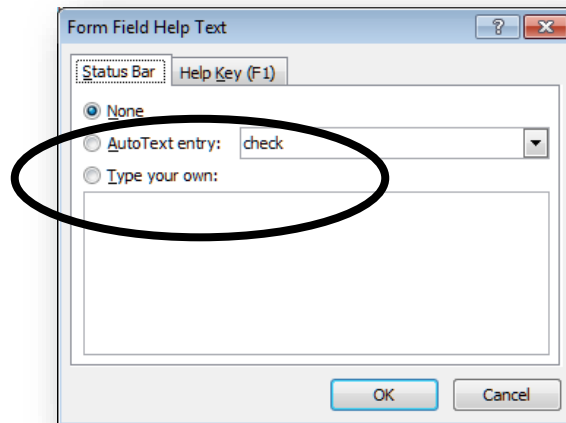
Help text can enhance the usability of the form. Text can be added to appear in the Microsoft Word status bar (located in the bottom, left-hand corner of the document window) and/or you can add text that will appear in a pop-up dialog box when the user is in a field and presses the F1 function key (Help).

1. **To add instructional text to appear in either the Microsoft Word Status Bar or when the user presses F1, do the following:**
 - a) Click on the control to which you would like to add help text.
 - b) Click the **Properties** button or double-click as a shortcut.

- c) In the dialog box that appears, click the **Add Help Text...** button.



- d) On the **Status Bar** tab, select **Type your own** and then click in the white text box below it and type in the desired help text you would like to appear in the Status bar.



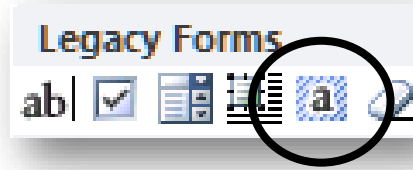
- e) Click the **Help Key (F1)** tab to type desired text you would like to appear when the user presses the F1 function key.

Show Form Control Shading

Form field shading can be turned on or off. If it is on it is easier for the user to see exactly where to enter the data when filling in the form. Microsoft Word defaults to the field shading turned on; however, it can be turned off.

1. To toggle form field control shading:

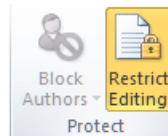
- a) On the **Developer** tab, go into the **Legacy Forms** tools in the **Controls** group, and click on the **Form Field shading** button.



Add Protection to a Form and Prepare It for Distribution

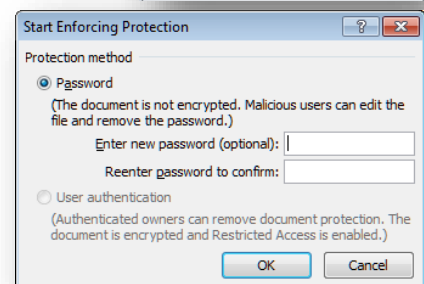
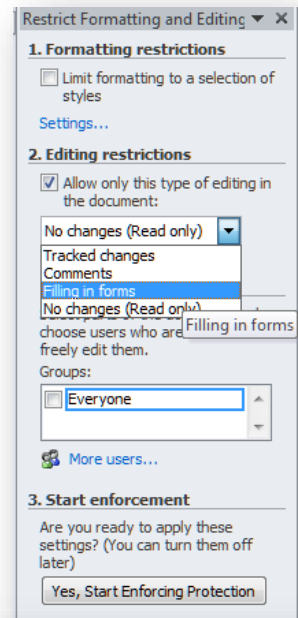
To protect the form so the user can enter information where required:

1. On the **Developer** tab, in the **Protect** group, click **Restrict Editing**:



2. The **Restrict Formatting and Editing** task pane will appear on the right side of your screen.

- a) Under **Editing restrictions** select **Allow only this type of editing in the document** check box.
- b) In the drop-down list of editing restrictions, select **Filling in forms**.
- c) Under **Start enforcement**, click **Yes, Start Enforcing Protection**.
- d) To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **Start Enforcing Protection** dialog box, and then confirm the password.



Note: If you choose not to use a password click **OK** with the password boxes empty, but keep in mind that anyone will be able to change your form.

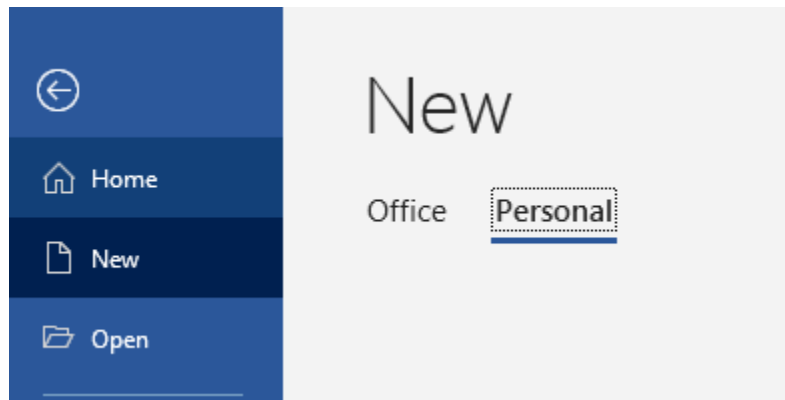
Use strong passwords that combine uppercase and lowercase letters, numbers and symbols. Passwords should be 8 or more characters in length.

It is critical that you remember your password. If you forget your password, there is no way of retrieving it. Store the passwords that you write down in a secure place.

e) Save the form.

Use the Form

1. Since the file was saved as a template, go to **File, New** and choose **Personal**.

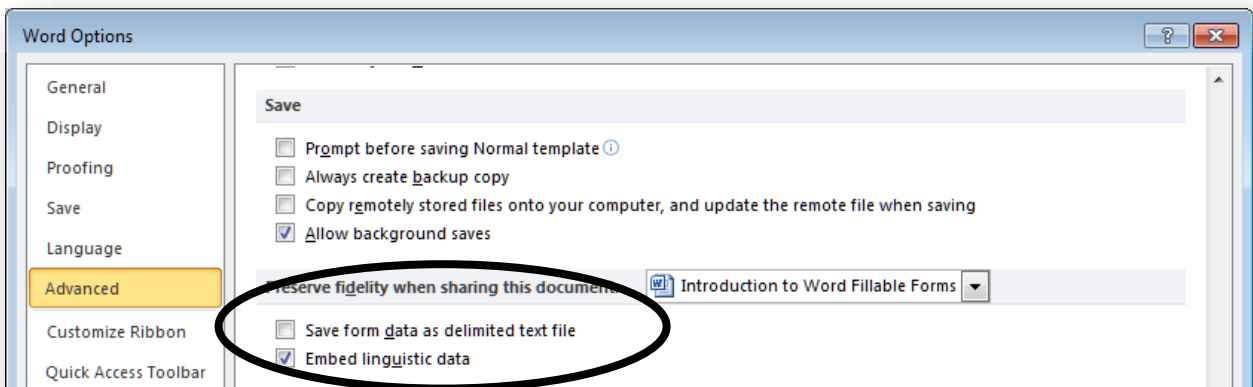


2. Choose it from the list of displayed templates and click **OK**.
3. Use the **Tab** key to move from field to field. Note once the initial numbers are entered that the form calculates automatically if calculations were used.

Transfer data from Word forms to an Excel worksheet

Follow these steps to save the data in each completed form to a text file that can be imported into Excel:

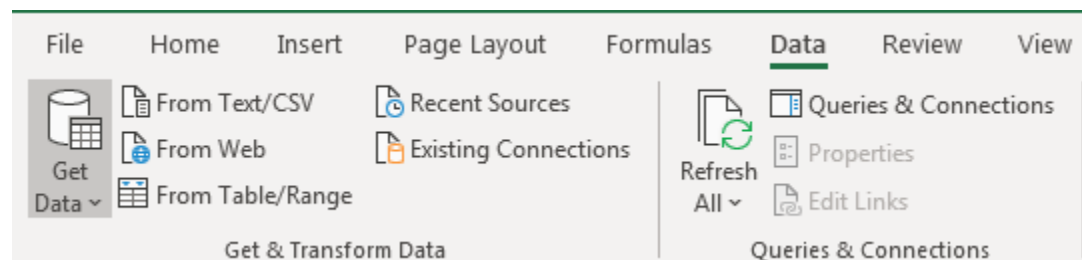
1. Open one of the completed forms.
2. Go to **File, Options**, and click the **Advanced** option on the left.



3. Check **Save form data as delimited text file**.
4. Click **OK**.
5. Save the file as a .txt file.
6. When the **File Conversion** dialog box appears, click **OK**.

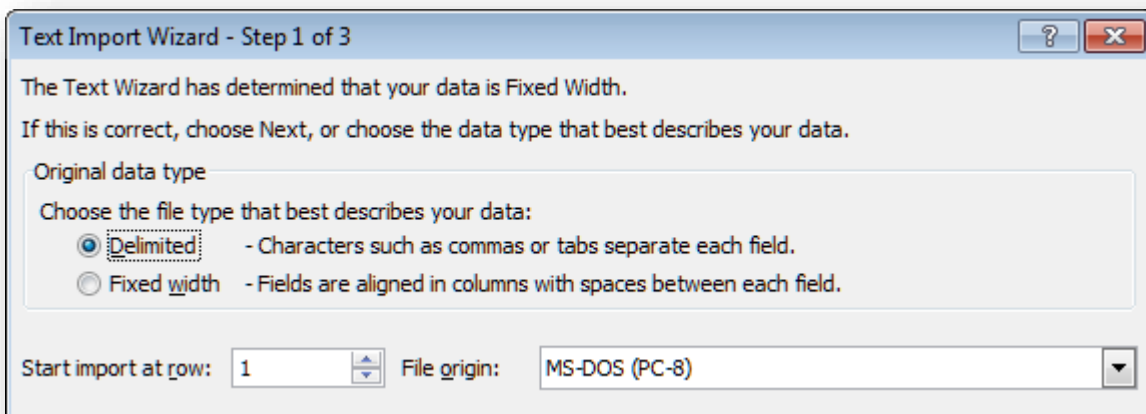
You can now import the data in the text files into a spreadsheet by following these steps:

1. Open a blank worksheet in Excel.
2. Click the **Data** tab, and then click the **From Text/CSV** button in the **Get & Transform Data** group.

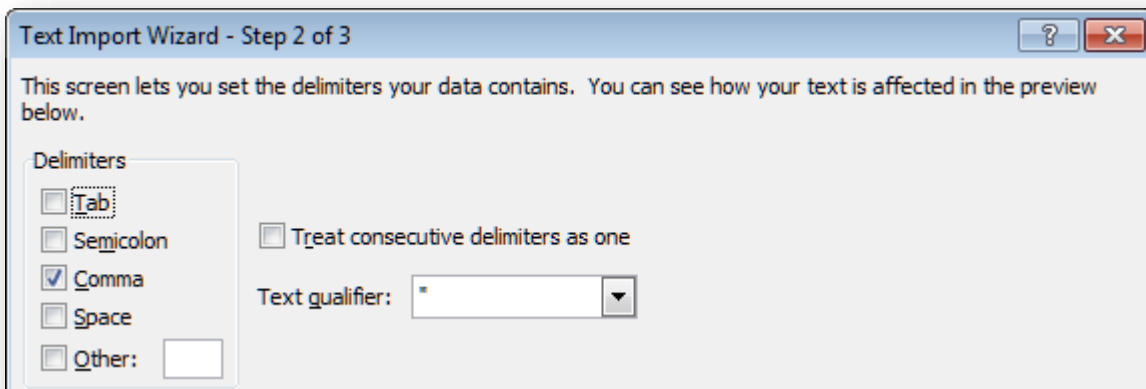


3. Click the text file you want to import, and then click **Import**.

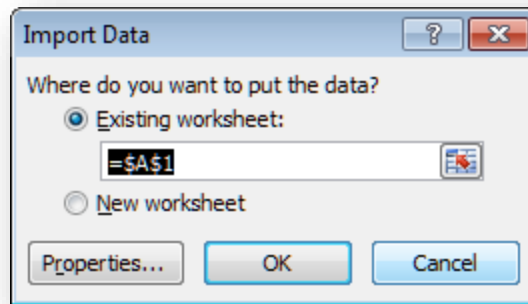
4. Select the **Delimited** option and then click **Next**.



5. Clear the **Tab** check box and then select the **Comma** check box.



6. Click **Next** and then click **Finish**.
7. The **Import Data** dialog box will appear. Click **OK**.



To import the second text file, you just use the same Excel worksheet and click in the second row below the last row of data; in this case, A4. (The wizard forces you to skip a row each time you add a new row of data. You can delete these blank rows later.)