

Creating Forms in Word 2007

room reservation form new.docx - Microsoft Word

Home Insert Page Layout References Mailings Review View Developer Acrobat Design Layout

Visual Basic Macros Record Macro Record Macro Pause Recording Macro Security Code

Design Mode Properties Controls

Schema Transformation Expansion Packs XML

Protect Document Protect Document Template Document Panel

Table Tools

Restrict Formatting and Editing

1. Formatting restrictions

Limit formatting to a selection of styles
Settings...

2. Editing restrictions

Allow only this type of editing in the document:
Filling in forms
Select sections...

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)
Yes, Start Enforcing Protection

See also
Restrict permission...

Section: 2 Page: 1 of 1 Words: 364 100%

THE COLLEGE OF SAINT ROSE – ROOM RESERVATION REQUEST

Approved:

Directions: 1. Call Conferences & Events at 454-5171 to make sure that the rooms requested are available
2. This form must be completely filled out and returned Kim Lynch at lynch@strose.edu

EVENT NAME & DESCRIPTION: Enter the Name of the Event

Event Day: Select day. Event Date: Select Date Approximate Attendance: #people

Event Starts: Select time. AM PM Actual Usage Time: AM - AM

Sponsoring Organization: _____

Requestor Name: _____

Person Responsible for Event: _____

Contact E-mail Address for Event: _____

ROOM NEEDED: None | None | None | None

If Other Specify Room(s): _____

SET-UP NEEDS(For assistance, contact Set-ups at 458-5438.)
2 weeks notice required for weekday events. 3 weeks required for evening and weekend events.

Style: Buffet (round tables, chairs around) If Other, Attach Diagram and Call Set-ups for Confirmation

Number of Tables Needed: _____ Number of Chairs Needed: _____

Equipment: None | None | None If Other, Please Specify: _____

OTHER NEEDS
(On campus groups will need to contact these offices separately)

Audio Visual: Call Mike Stratton (x3890) for any events in Lally School of Education. 2 weeks notice required for weekday events, 3 weeks notice required for evening and weekend events. Call Jane Doe (x5456) for all other campus locations. 1 week notice required.

Facilities: No Yes. Call x2800 if Facilities is required to prepare, porter, or clean up after an event. 2 weeks notice is required for weekday events, 3 weeks notice required for evening and weekend events. The event **MUST** be posted on the events calendar.

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Forms


Forms are documents that make data entry easy for users and allow people to complete the form electronically on their computer. The developer of the form then protects the form so that users can then fill in the form in the designated input areas, called **form fields** without changing the form itself. **Content controls** limit the available choices users can select to ensure valid data entry. There are three types of content controls available: drop down lists, check boxes, and date pickers.

The first step is to create a template or document on which to base the form. Design the form by sketching a layout, or use an existing form as a guide. Tables are often used to organize and present information in a form. (Refer to the manual on how to create tables in Word 2007). Some tips to consider when designing the form include the following:


- Group similar items together on the form.
- Place the most important information at the top of the form.
- Make the form easy to read by using white space and lines to separate sections on the form.
- Don't clutter the form.
- Don't include unnecessary information, to increase the likelihood of having the form completed entirely.

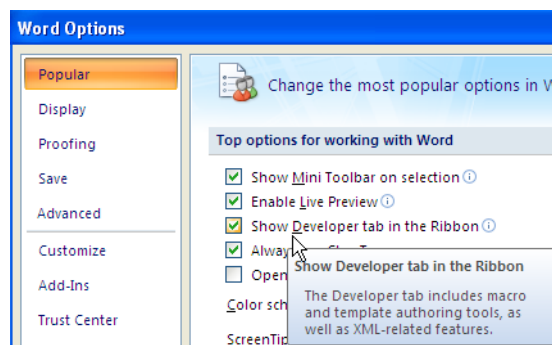
Once the text and structure of the form is created, you add form fields and content controls.

To access Word's form controls, we need to access the controls group on the Developer tab.

The developer tab also contains form development tools that were available in previous versions of Word called legacy tools . These can be used as well.

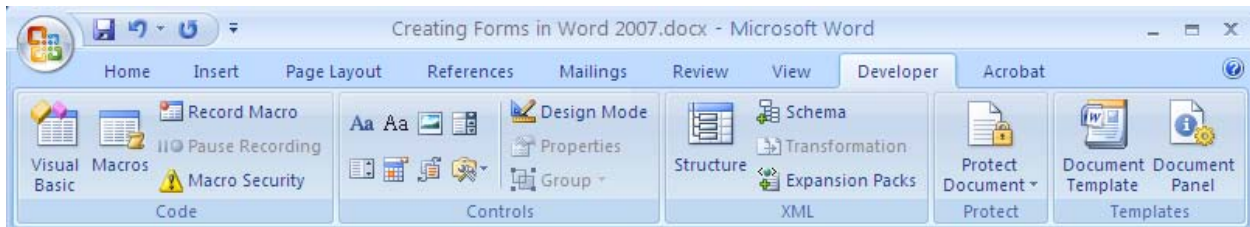
Note: If the Developer tab is not available on the ribbon do the following:

1. Click the Microsoft Office Button , and then click **Word Options**.
2. Click Popular.
3. Select the Show Developer tab in the Ribbon check box, and then click OK.



Controls

1. Click the Developer tab.



2. The Controls group contains the buttons you will need to create your form.


If content controls are not available (dimmed) you might have opened a document created in an earlier version of Word. You will have to convert the document to the Word 2007 file

Click **Design Mode**, and then click where you want to insert a control.



Sets control properties

3. The table below summarizes the controls.

Form Field	Definition	Example
Rich Text	Supports formatting such as a hyperlink or email address	Use when requesting an email address or webpage. Can be used for a short paragraph such as a comments field.
Plain Text	Limited to content that cannot contain any formatting, only plain text. Inherits the formatting of text that surrounds it.	Use for a simple paragraph or comments.
Picture	Fills the content control with a single picture.	Use for a drawing, shape, chart, table, clip art object, or Smart Art graphic.
Combo Box	Contains a list of choices with the use can pick from. Has the added capability of being able to edit directly.	A list the user can select from such as a list of names.
Drop-Down List	Contains a list of restricted choices defined by the template author when the user activates the drop-down box.	Use this to provide a set of choices, such as a list of names. User can not edit contents.
Date Picker	Contains a calendar control. Allows the user to click & select the date.	Use this to help users enter a date.
Building Block Gallery	Shows a gallery of formatted design choices that you can add to the content control.	Use this to specify a set of cover pages, headers and footers, page designs, or other building blocks that you add to the Quick Parts gallery.

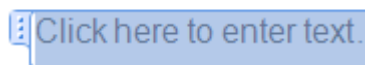
Legacy Tools 	Form development tools from previous versions of Word.	Provides extra form tools such as a check box.
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Add Text Control

1. Click where you want to insert a control.
2. On the Developer tab, in the Controls group, click the Rich Text control  or the
3. Plain Text control .



4. By default it inserts the default placeholder “click here to enter text.”




Instructional Text

Instructional text can aid in obtaining accurate information. When you create a form, you can add text to each data field that provides specific directions on what information to enter. The instructional text is replaced when the user enters data.

5. To insert instructional text, type the instructions at the location where you will insert the text content control. Select the text and click the Text button in the controls group. The instruction are selected and become part of the data field.


Exercise – Add Text Control with Instructional Text

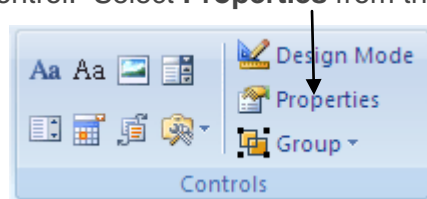
1. Open the document named “Form Exercise.” Let’s add some content controls to the sample form shown below.
2. Click in the Caller area. Type “enter the caller’s name here”
3. On the Developer tab, in the Controls group, click the plain text  control.
4. The text control along with the instructional text is inserted, as shown below.

For		Date:		Time:		A.M.	P.M.
Caller	Type the caller's name here						
Company							
Contact#							Phoned
Message							Returned your call
							Please Call
							Will call Again
							Came to See You
Signed							Wants to See you

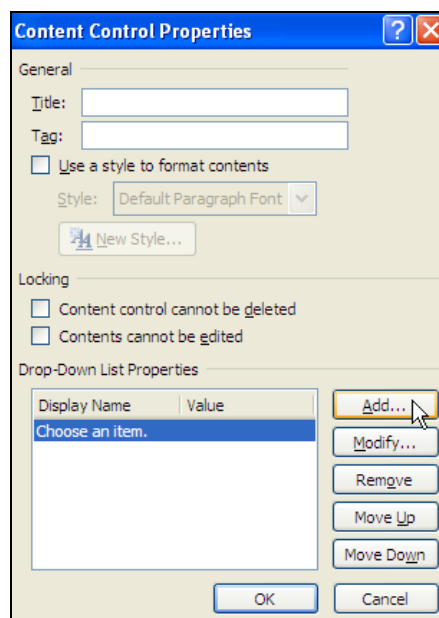
Create a drop-down list

A drop down list can restrict the available choices to those you specify.

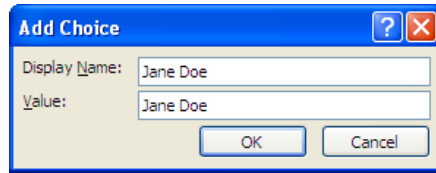
1. Click where you want to insert the drop-down list.
2. On the Developer tab, in the Controls group, click the Drop-Down List  control.
3. Select the Drop-down list control. Select **Properties** from the **Controls** group.



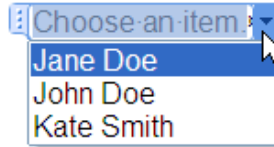
4. To create a list of choices, under Drop-Down List Properties, click **Add**.



5. Type the name of the choice in the Display Name box. Click OK.




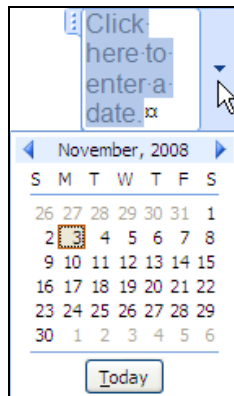
6. Repeat this step until all of the choices are in the drop-down list. You are done.



Date Picker

The date picker contains a calendar control which users can click and select the date.

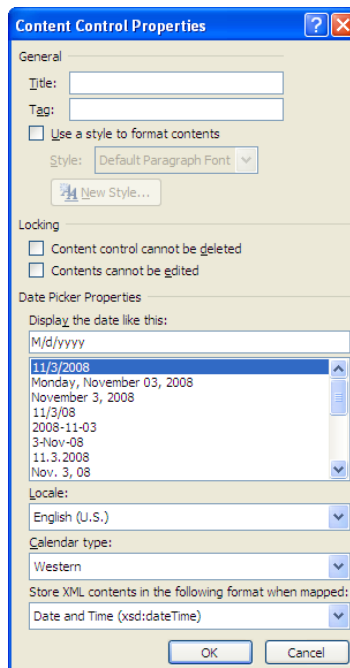
1. Click where you want to insert date picker.
2. On the Developer tab, in the Controls group, click the Date Picker  control.



Set or change properties for content controls

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.

3. Click the content control that you want to change.
4. In the controls group, click **Properties**. Make the desired changes. Click OK.

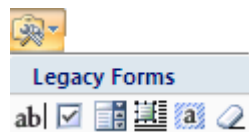


Legacy Form Tools







The legacy tools offer development tools that were available in previous versions of Word. Legacy tools offer some options not available with the new form fields such as check boxes.

Legacy forms fields also have some expanded options which you can change in the properties dialog box, such as limiting the number of characters in a field.

1. Click the Legacy Tools button in the Controls group in the Developer tab.
2. The drop down list displays legacy form fields and tools. You can use these tools along with the new content controls to create forms.






3. The table below summarizes the legacy tools.

Form Field	Definition
Text Form Field 	Use to create a placeholder for general text entry similar to plain text control.
Check Box Form Field 	Use for multiple-selection items. For example, yes or no check boxes.
Drop-Down Form Field 	Allows the user to make a selection from a drop-down list.
Insert Frame 	Surrounds the selected object with a free-floating box for precise placement in the document.
Form Field Shading 	A toggle, which gives form fields a gray shade when, activated.
Reset Form Fields 	Clears any data entered into the Fields

Create a Text Form Field

The legacy text form field is very similar to the rich and plain text controls, but they do have some additional options you can set, such as maximum length and help text.

1. Position your insertion point in your form where you want to insert the form field.
2. On the Developer tab, in the Controls group, click  Legacy Tools.
3. Click the Text Form Field .
4. A grey shaded box is inserted in the form. The shaded box is the location where data is entered when a person fills in the form.
5. The shading will not print when the form is printed.

Time: 

6. To view or set properties for the field, select the form field and click Properties.



7. Select the desired options in the Form Field options dialog box. The example below sets the field to automatically display the current time at the time the form is being completed.

To limit the amount of information a person can type in the field, enter a value under Maximum length.



Text Form Field Options

Text form field

Type: Current time (dropdown) Default time: (text box)

Maximum length: Unlimited (dropdown) Time format: h:mm am/pm (dropdown)

Run macro on

Entry: (dropdown) Exit: (dropdown)

Field settings

Bookmark: Time (text box)

Fill-in enabled

Calculate on exit

Add Help Text... (button) OK (button) Cancel (button)

Add Help Text

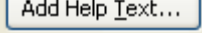
You can add **Form Field Help Text** to specific fields, so that users can get more information or help while performing data entry in a specific field.

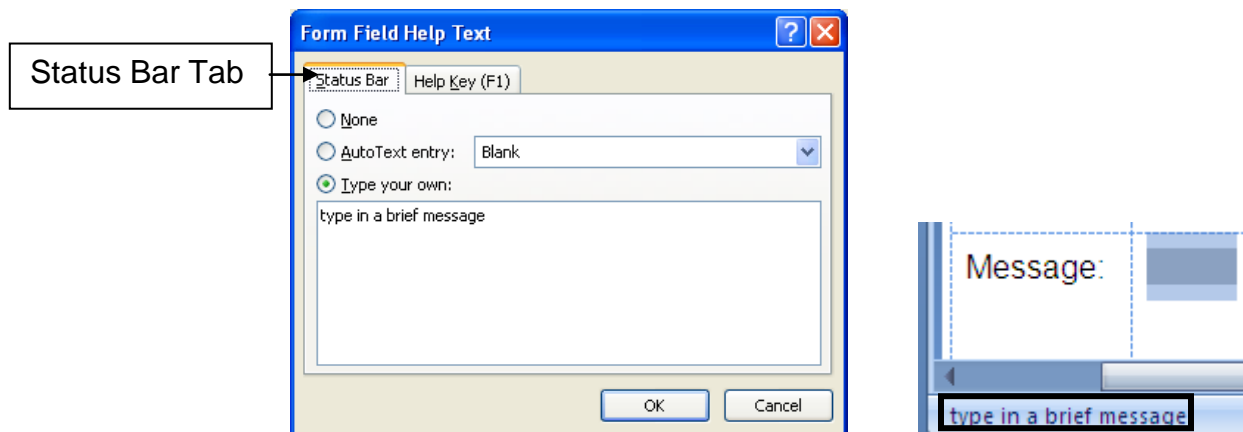
In the Form Field Help Text dialog box, there is a Status Bar tab and a Help Key tab.

The **Status Bar Tab** will display your typed message in the status bar.

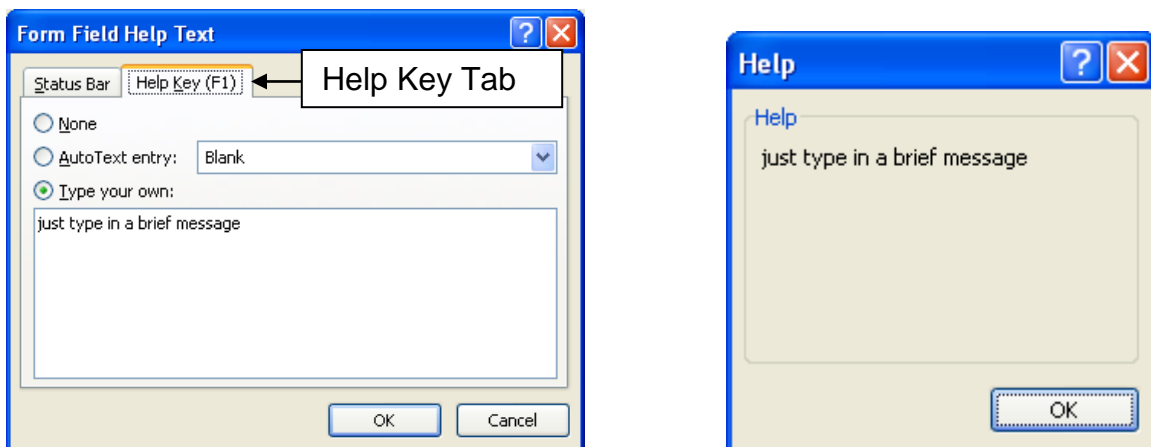
The **Help Key Tab** will display a dialog box with a help message when F1 is pressed.

Exercise – Add Help Text to the drop down box

1. In the properties dialog box select .
2. In the **Status Bar tab**, select the option to **type your own** and type text that you want to appear in the status bar when the user clicks in that field.



1. Select the Help Key (F1) tab; select the option to **type your own**, and type text that you want to appear. Your message will appear if the person presses the F1 key.





2. Select **OK twice**.

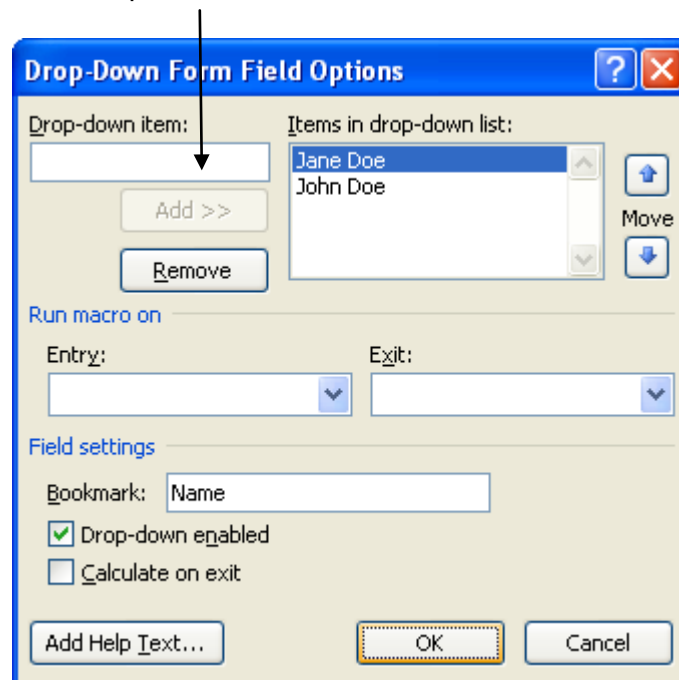
Note: Before these Help features can be accessed, the form must be **protected**.

8.

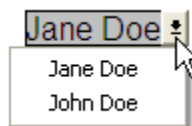
Create a Drop-Down List

You can also use legacy tools to create a list of choices the user can select from.


1. Position your insertion point in your form where you want to insert the drop down list.
2. On the Developer tab, in the Controls group, click  Legacy Tools.
3. Click the **Drop-Down Form Field**  button.
4. Click the **Properties** button
5. Type in an entry for the drop down list and click **Add**.



6. Repeat this step until all of the choices are in the drop-down list. Click OK.
7. By default the first name added to the drop-down list appears in your form.



Create a Check Box

1. Position your insertion point in your form where you want to insert the drop down list.
2. On the Developer tab, in the Controls group, click  Legacy Tools.
3. Click the **Check Box form field**.

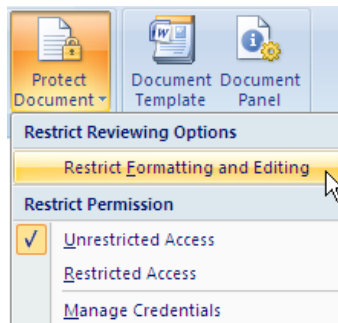
Note: You won't be able to select or clear the check box until you protect the form.

For	Choose an item.	Date:	11/4/2008	Time:	1:42 PM
Caller	Click here to enter text.				
Company	Click here to enter text.				
Contact#:	<input type="text"/>	<input type="checkbox"/>	Phoned		
Message:	<input type="text"/>	<input type="checkbox"/>	Returned your call		
		<input type="checkbox"/>	Please Call		
		<input type="checkbox"/>	Will call Again		
		<input type="checkbox"/>	Came to See You		
Signed	<input type="text"/>	<input type="checkbox"/>	Wants to See you		

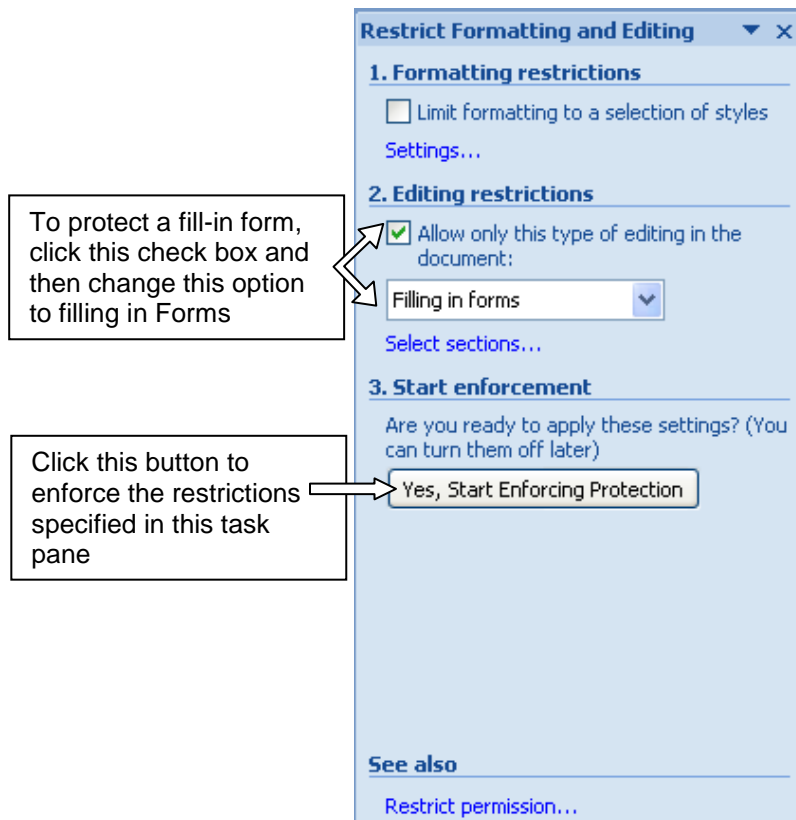
Protect the Form

Once you have the form set up you need to prepare the form to be filled out. You want users to be able to fill out the form, but not edit the form itself. This requires you to protect the form. Protection must be activated in order for form fields to function properly.

1. Open the form.
2. On the Developer tab, in the Protect group, click **Protect Document**. Select **Restrict Formatting and Editing**.



3. This will display the Restrict Formatting and Editing Task pane shown below.
4. 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. Creating a password is optional, you can leave it blank. Otherwise, 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.



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

8. It is critical that you remember your password. If you forget your password, Microsoft and/or the Help desk **cannot** retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.



Use this feature with caution.

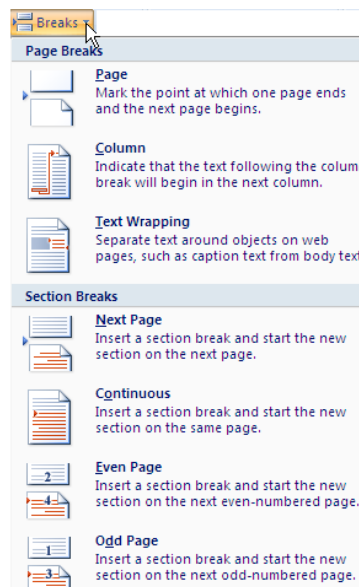
- * If you lose or forget the password, it **cannot** be recovered!

Protect Sections of a form

Insert a Section Break

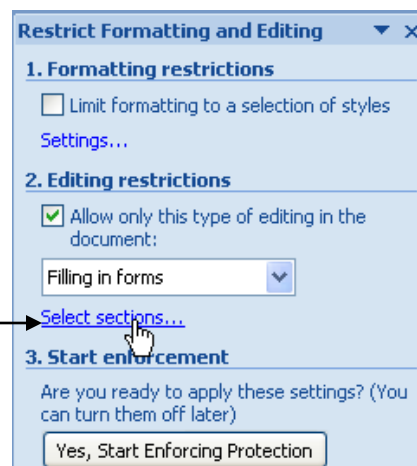
What if you need to protect only certain sections of the document? Then you need to insert section breaks in your document. For example, if your document contains a form and other text, and you want to protect just the form you need to insert section breaks.

1. Position your insertion point in the document where you want to insert a section break.
2. On the ribbon select the Page Layout tab. In the Page Setup group, click **Breaks**.
3. Under Section Breaks select **Continuous** (if the section is on the same page with the rest of the form, but you need a section break).



4. When you protect the form, click **Select Sections** link in the restrict Formatting and Editing task pane.

If you have inserted at least one section break, the Sections link will be active.



5. Select the sections you want to protect.
6. Click **OK**.

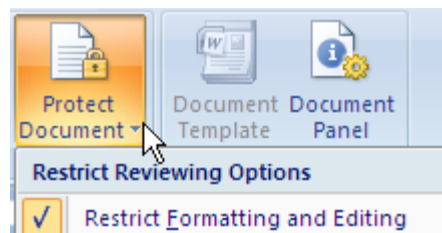


7. Under Start enforcement, click **Yes, Start Enforcing Protection**.

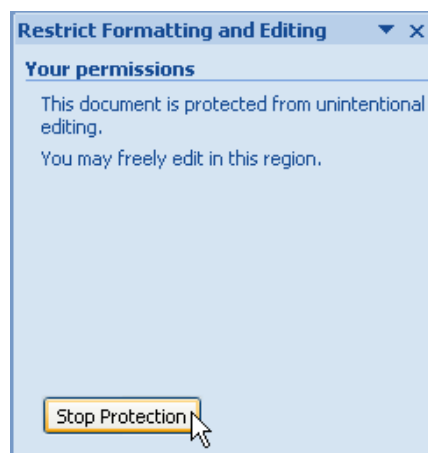
Unprotect the form

You may have to go back and make some changes to the form, in which you need to unprotect it, make your edits, and protect the form again.

1. Open the form.
2. On the Developer tab, in the Protect group, click Protect Document, and then click Restrict Formatting and Editing, to reopen the task pane.

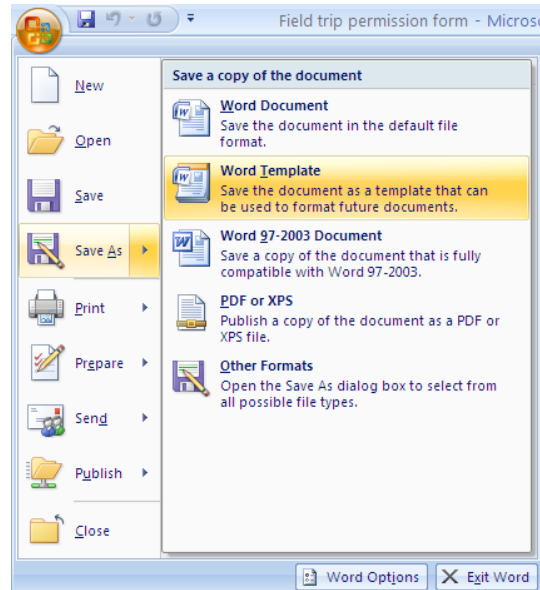


3. In the Restrict Formatting and Editing task pane click **Stop Protection**.



Save as a Template

1. Click the **Microsoft Office Button**  , and then click **Save As**.
2. Select **Word Template**.



3. In the Save As dialog box, give the new template or document a file name, and then click Save. Notice that it saves it as a template with the .dotx extension.
4. When you open the template it creates another document leaving your original file intact.

Summary

You have completed the forms class. Most forms use a table to layout the information. The developer tab offers new and legacy form tools that can be inserted in your form.

You have some new controls such as the date picker that lets users easily select a date on a calendar. Legacy tools give you access to some of the same controls such as text boxes, and drop-down lists, but have other properties you can set such as the maximum number of characters and shading. Checkboxes are great for users to check off their selections.

Lastly, we learned about the final and most important step of protecting or preparing the form for data entry. This activates the form features so users can complete data entry.