
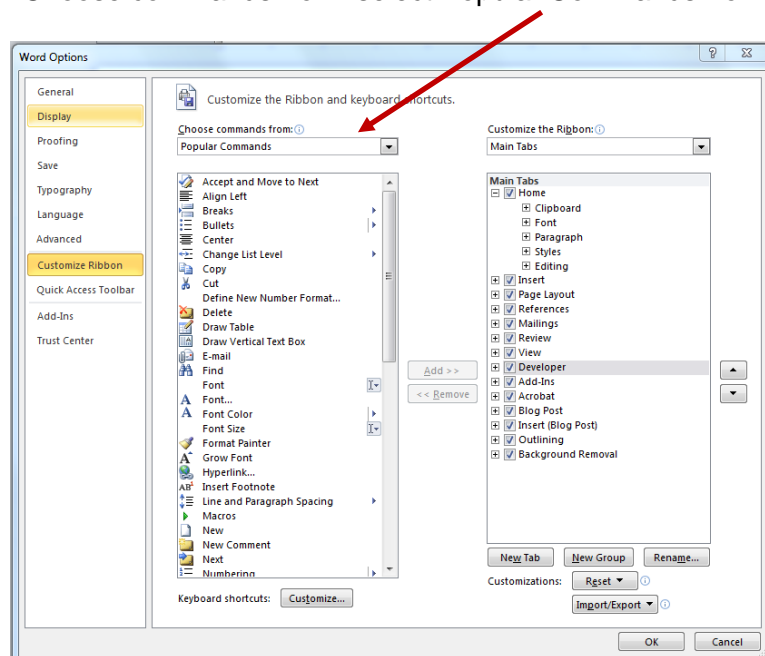


# Creating Forms in Word

## Preparation: Set Up Word for Creating Forms

In order to create a form, you must have the “Developer” tab enabled. To do this:

1. Click on the **File** tab.
2. Click on Options. 
3. Click Customize Ribbon.
4. Under “Choose commands from” select Popular Commands from the dropdown.



5. Click once on **Developer** (in the left column) and then click the **Add** button. “Developer” will appear in the right column.

## The Process

It’s easy to create forms in Word:

1. Open a new or existing document
2. Add content controls (form fields) to the document
3. Set the properties for each content control
4. Protect the document/form

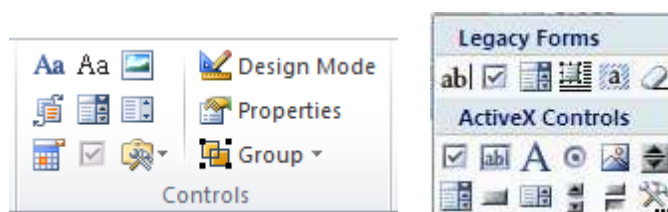
## Step 1: Open a New or Existing Document

New Document	Existing Document
<ol style="list-style-type: none"><li>1. Click the <b>File</b> tab, and then click <b>New</b>.</li><li>2. Under Available Templates, click <b>Blank Document</b>. <i>A new blank document will open.</i></li><li>3. Click the <b>File</b> tab, and then click <b>Save As</b>.</li><li>4. In the Save As dialog box, give the document a file name, and then click <b>Save</b>.</li></ol>	<ol style="list-style-type: none"><li>1. Click the <b>File</b> tab, and then click <b>Open</b>.</li><li>2. Locate and double-click on the desired file. <i>The document will open.</i></li></ol>

## Step 2: Add Content Controls to the Form

Design the form by sketching a layout first, or use an existing form as a guide. In your form, you can add content controls, tables, and other graphics elements. Though not advised, you *can* also add legacy controls (i.e. Word 2003).

- On the Developer tab, in the Controls group, click **Design Mode**, and then click where you want to insert a control.





## Form Types

Listed below are the types of fields (content controls) that you can enter into your form:

Content Control	Definition	Example	Restrictions
<b>Rich Text</b>	Formatting can be saved by loading, saving or closing the document	Use for a short paragraph such as an abstract, a summary or a disclaimer.	No restrictions.
<b>Plain Text</b>	Limited to content that cannot contain any formatting, only plain text.	Use for a simple paragraph.	Limits the formatting to that which is applied around the content control.
<b>Picture</b>	Fills the content control with a single picture.	Use for a drawing, shape, chart, table, clip art object, or SmartArt.	Limits formatting changes to brightness and contrast.
<b>Building Block Gallery</b>	A predesigned piece of content.	A cover page, header, or footer.	No restrictions.



Content Control	Definition	Example	Restrictions
<b>Combo Box</b>	Contains a list that you can edit directly.		Limits text to a single paragraph that cannot contain formatting.
<b>Drop-Down List</b>	Contains a list of restricted choices defined by author.	Use to provide a set of choices.	Limits text to a single paragraph that cannot contain formatting.
<b>Date Picker</b>	Contains a calendar control.	Use to help users enter a date.	Limits text to a single paragraph that cannot contain formatting.
<b>Check Box</b>	Box that toggles between containing a check or not.	Use to denote a selection.	No formatting.

### Insert a text control


1. If necessary click the **Developer** tab.
2. Click the **Rich Text** control  or the **Plain Text** control  in the Controls group.

### Insert a drop-down list or combo box


*NOTE: A drop-down list permits a single choice from the list; a combo box allows entering a choice that isn't in the list.*

1. If necessary click the **Developer** tab.
2. Click the **Combo Box** control  or **Drop-Down List** control  in the Controls group.
3. Click **Properties**.
4. Click the **Add** button.
5. Type a choice in the **Display Name** field.  
*Repeat steps 4 & 5 until all of the choices are in the list.*
6. Click **OK**.

### Insert a check box

1. If necessary click the **Developer** tab.
2. Click **Check Box**  in the Controls group.  
*NOTE: You won't be able to select or clear the check box until you protect the form.*

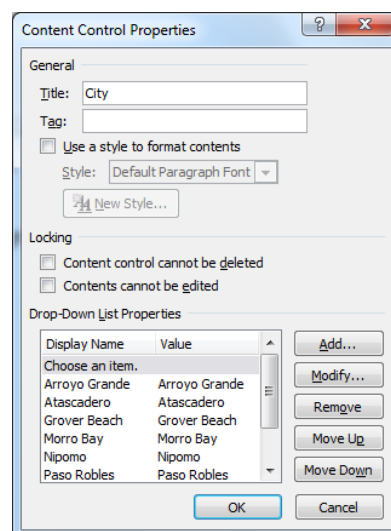
### Insert a date picker

1. If necessary click the **Developer** tab.
2. Click **Date Picker**  in the Controls group.  
*NOTE: You won't be able to select or clear the check box until you protect the form.*
3. Click **Properties**.
4. Select desired properties and then click **OK**.

## Step 3: Set or Change Properties for Content Controls

Each content control has properties that you can set or change.

1. Click the content control you wish to change.
2. Click **Properties** on the Developer tab in the Controls group.
3. Change the desired properties and then click **OK**.

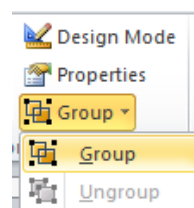


## Step 4: Protect and/or Prepare the Form

Protecting a form allows those using the form to enter data in the content controls while preventing changing the rest of the document (text, layout, etc.)

### Protect the form

1. Open the form that you want to protect.
2. Press **[Ctrl]-[A]**.  
*The entire document should be selected.*
3. Click **Group** (on the Developer tab, in the Controls group), and then click **Group**.



## Protect when using Legacy Tools

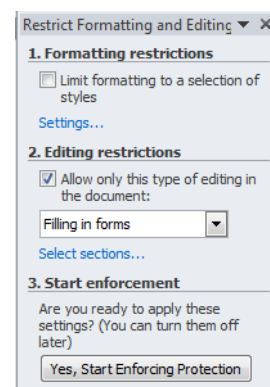
If you have used legacy tools, you will need to protect the document by restricting formatting to “Filling in forms”. Unfortunately, restricting formatting prevents using other Word features when completing the form, such as Spell Check.

For this reason, **using legacy tools is discouraged**.

1. Open the form you want to prepare.
2. Click **Restrict Editing** (on the Developer tab, in the Protect group).



3. Select the **Allow only this type of editing in the document** check box (in the “Restrict Formatting and Editing” task pane, under “Editing restrictions”).
4. Select **Filling in forms**, in the list of editing restrictions.
5. Click **Yes, Start Enforcing Protection**, under Start enforcement.



6. Optional: Type a password in the **Enter new password (optional)** box, and then confirm the password.
7. Click **OK**.

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

**VERY IMPORTANT:** It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it.

