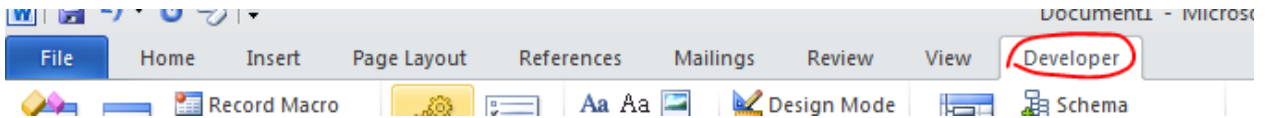
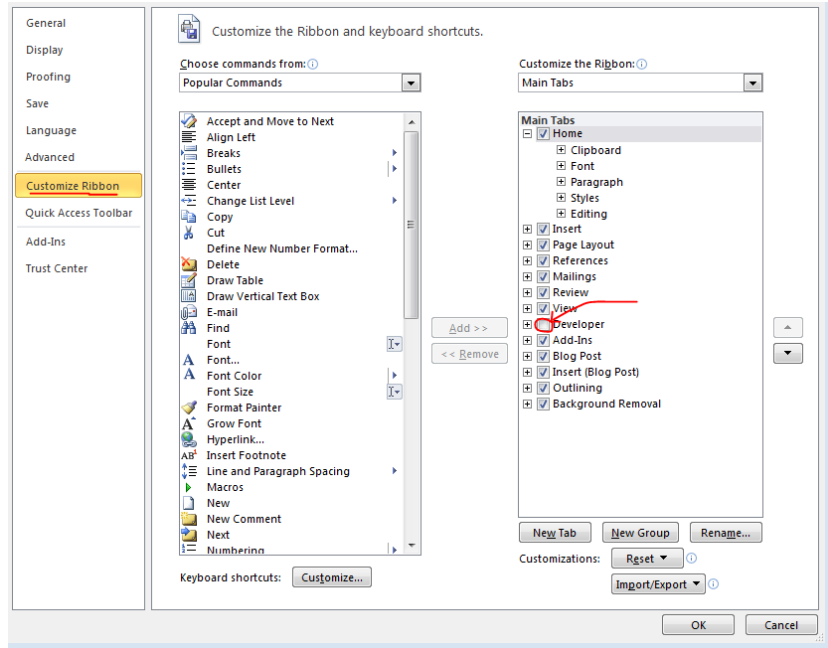


Creating Fillable Forms in Word 2010

The commands used for created Word 2010 forms are not actually visible by default. To get access to these commands we need make the **Developer Tab** visible.

To make this tab visible:

- 1) Click the **File** tab
- 2) Click **Options**
- 3) Select **Customize Ribbon**
- 4) In the right column list make sure the **Developer** option is **Checked**
- 5) Click **OK**
- 6) You should now see a new visible tab called **Developer** as seen below.

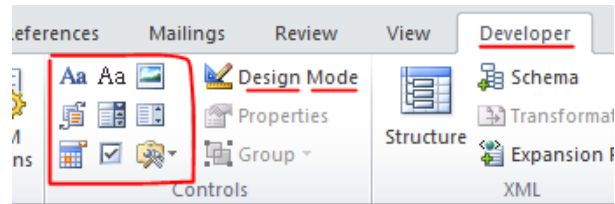



Many people find it ideal to organize form elements using tables.

- a) Select the **Insert** tab >> Tables >> and then rollover the dimension for your table size. For this example we will choose **2 columns and 4 rows**.
 - a. You can click and drag any of the table lines to resize the table, rows, or columns.
- b) In the left column we can type in the data fields we would like to collect such as:
 - Name
 - Date
 - I am employed
 - Favorite Color: (red, green, or blue)

Name:	
Date:	
I am Employed:	
Favorite Color:	

- c) To add our form elements:
 - i. Select the **Developer** tab
 - ii. In the **Controls** group we find all the form elements we will want to add.
 - iii. But before adding any form elements **First Click “Design Mode”**



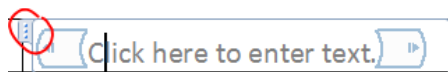
- d) Now with our cursor in the right column next to **Name** we will want to add a text box.
 - i. For most forms we want to click the **Plain Text Content Control** ()
 - ii. A text control now appears next to **Name**.



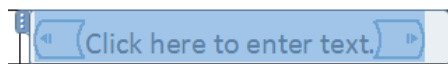
Note: By default it includes a “Click here to enter text” message. For now leave that text alone. It is a message intended for those filling out your form.

- iii. Though not critical, a good habit is to identify the purpose of each of your form elements. To do this:

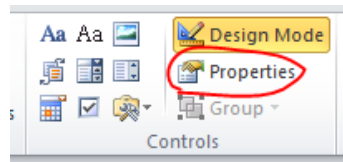
1. Select your form element. To make sure the entire element is selected click the blue tab at the left end of the element




When fully selected it should look like this:



2. Once selected click the **Properties** button in the Ribbon

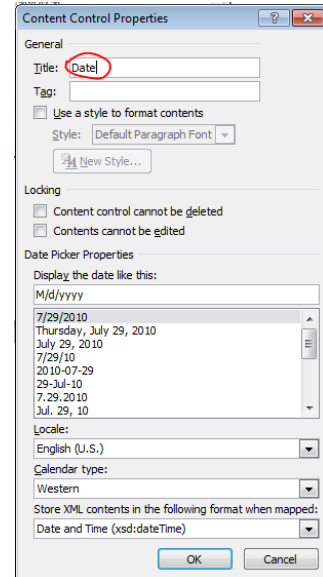


3. In the dialog box that appears give this form a **Title** like “Name”
4. **Click OK.**

- e) Next we will add a date picker to our form
 - i. Place your cursor in the column to the right of the **Date** field
 - ii. Now click on the Date Picker control ()
 - iii. With the **Date Picker** now visible and still selected click **Properties**

iv. In the **Title** field enter “Date”. The title will be displayed next to the date picker to provide a visual clue of what the control is.

v. Click **OK**.



f) Next we will add 2 check boxes for a **Yes/No** option regarding employment.

i. Place your cursor in the column to the right of the “I am Employed” field.

ii. Now click on the **Checkbox Control** ()

iii. Just as before select each form element, click **Properties**, and provide a title for each box.

iv. Next to each form element we will also want to add a corresponding **YES** or **NO** for each checkbox.

g) Finally we will add a dropdown box regarding this person’s favorite color.

i. Place your cursor in the column to the right of the “Favorite Color” field.

ii. Now click on the **Dropdown List Control** ()

iii. While still select click **Properties** up in the Ribbon under the **Design Mode** command.

iv. Provide a **Title** for this control like **Color**

v. In the bottom right click **Add** so we can add items to our dropdown list.

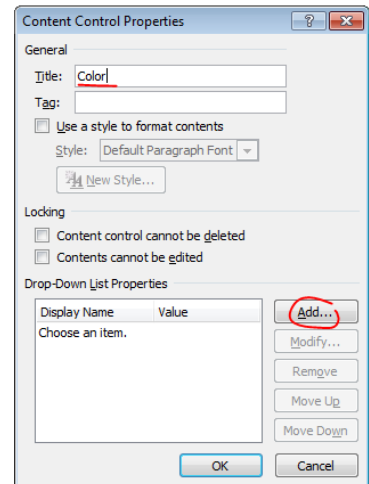
vi. In the **Add Choice** dialog box provide a display name of **Red**

vii. A value of **Red** is automatically entered for you.

Note: When creating these dropdown items sometimes the display name is long for the user to understand while the value is brief for information to be later saved to a database. (Ex: Name: Pennsylvania; Value: PA). Consider providing an abbreviated value as appropriate.

viii. Continue to **Add** color options as you see fit.

ix. Click **OK**.



h) With all of your form fields created you can now turn off **Design Mode**.

i. On the Developer tab >> Controls group >> click **Design Mode**.

ii. You will now notice the blue brackets around your form elements disappear.

With Design Mode ON:

Name:	<input type="text" value="Name"/> Click here to enter text. <input type="text" value="Name"/>
Date:	<input type="text" value="Date"/> Click here to enter a date. <input type="text" value="Date"/>
I am Employed:	<input type="checkbox"/> Yes <input type="checkbox"/> Yes Yes <input type="checkbox"/> No <input type="checkbox"/> No No
Favorite Color:	<input type="text" value="Color"/> Choose an item. <input type="text" value="Color"/>

With Design Mode OFF

Name:	Click here to enter text.
Date:	Click here to enter a date.
I am Employed:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Favorite Color:	Choose an item.

- i) The final step is to make this document so users can only edit form fields.
 - i. On the Developer tab >> Protect group >> click **Restrict Editing**
 - ii. In this case we want to select **Option 2** so check the box to “**Allow only this type of editing in the document.**”
 - iii. Once checked, in the dropdown select “Filling in Forms”
 - iv. Finally click the button at the bottom, “Yes, start enforcing protection”
Note: If this button is greyed out it means you are still in **Design Mode**. On the Developer tab >> Control group >> click **Design Mode** and this button will become enabled for you.
 - v. You are then prompted to supply a password for this document protection.

Note: It is recommended that BEFORE you protect this document with a password that you save a separate version of this document without any protection. Otherwise, without the password you will not be able to make changes to your document again. It’s a wise backup plan.

- vi. Once protected, save your document.

Additional Consideration

- A. When creating Word 2010 forms saving your forms as a PDF will negate any interactive form functionality. Your document must be distributed as a Word document to retain fillable forms.
- B. Consider your audience when creating these forms. Ideally these forms will be filled in, saved and emailed back to you. If a user might print out the form and fill it in by hand then your form items may be a problem. For example:
 - a. Dropdown options will not display when printed out.
 - b. “Click here to enter text” will be included in the printout. (You can remove this text as needed.)

Forms can of course be better designed than this example but this should supply the basic knowledge to build most forms.

Provided by Jason Lee: 7/28/2010