Create Online Form-Legacy Controls

For this lesson, you will be using the Online Forms Practice Exercise. This document can be found on the Word 2013 Web page under the Forms Section.

Before you can work with Forms in Microsoft Word 2013, the Developer Tab has to be displayed. If the Developer Tab is not displayed on the Ribbon, complete the steps below to show the tab.

DISPLAY THE DEVELOPER TAB
▷ Click the File Tab (see illustration at right).
▷ On the left side of the window, click the Options link.
▷ The Word Options window will display.
▷ Click the Customize Ribbon link (see illustration below).

In the Customize the Ribbon area, click the Developer Tab check box.
▷ Click the OK button to save the changes and return to the Word 2013 window.

TURN ON DISPLAY MODE
▷ Click the Developer Tab.
▷ In the Controls Group, click the Design Mode button (see illustration on next page).
▷ The buttons in the Controls Group will become active.
To work with the **Content Control** buttons, the form has to be in **Design Mode**.
To work with the **Legacy** buttons, it is not necessary to be in **Design Mode**.
Instructions for working with each of these form buttons can be found on the **Word 2013 Training Web Page**.
A listing of all the controls and their purpose is available on the **Word 2013 Training Web Page**.

**Regular Text Form Field**
A text form field allows users to enter text, numbers, symbols, or spaces into a form. With this type of Form Field, it is also possible to specify that the current date and time be inserted into the form.
Place the insertion point to the right of the text, **Name**, in the form.
Click the **Developer Tab**.
In the **Controls Group**, click the **Legacy Tools** button (see illustration below left).

Click the **Text Form Field** button under **Legacy Forms** (see illustration above right).
The **Field** will be inserted next to **Name**.
Click the **Properties** button in the **Controls Group**.
The **Text Form Field Options** dialog box will display (see illustration below).
Click the drop-down arrow for the **Type** box.

The **Type** field in the **Text Form Field Options** box contains six different field types. These field types are described in the table below.

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Text</td>
<td>This field type accepts text, numbers, symbols, or spaces.</td>
</tr>
<tr>
<td>Number</td>
<td>This field type requires a number. The format can be changed to whole</td>
</tr>
<tr>
<td></td>
<td>numbers, decimals, or currency.</td>
</tr>
<tr>
<td>Date</td>
<td>This field type requires a valid date. A format for the date may be</td>
</tr>
<tr>
<td></td>
<td>specified.</td>
</tr>
<tr>
<td>Current Date</td>
<td>This field type displays the current date. Users cannot fill in or change</td>
</tr>
<tr>
<td></td>
<td>this field.</td>
</tr>
<tr>
<td>Current Time</td>
<td>This field type displays the current time. Users cannot fill in or change</td>
</tr>
<tr>
<td></td>
<td>this field.</td>
</tr>
<tr>
<td>Calculation</td>
<td>This field type uses an =(Formula) field to calculate numbers, such as</td>
</tr>
<tr>
<td></td>
<td>the sales tax on a subtotal. Users cannot fill in or change this field.</td>
</tr>
</tbody>
</table>

Make sure **Regular text** is selected under **Type**. If not, click the drop-down arrow and select that option.

Change the **Maximum Length** by doing one of the following:

- Click the spinner arrows until the number changes to the desired length.
- Highlight the words **Unlimited** and then input the number.

Click the **Text format** list arrow to select a format for the text. The options are **Uppercase**, **Lowercase**, **First capital**, and **Title case**.

Make sure that **Fill-in Enabled** is checked.

Click the **Add Help Text** button to open the **Form Field Help Text** dialog box.

Click the **Help Key (F1)** tab (see illustration below left).

Click the **Type your own** option button.

In this box input something like: **Input your full name**.
Copy the text (Ctrl + C) that was inserted into the Help Key text box.

Click the Status Bar tab (see illustration above right).

Text can be copied from the Help Text box.

Different text can be inserted into the Status Bar option.

Click in the text box under Type your own.

When the text box is clicked, the Type your own option button is automatically selected.

Paste the copied text into the Status Bar text box (Ctrl + V).

When text is inserted into the Status Bar area of the dialog box, that text is displayed on the Status Bar of the window when the form has been protected.

When the Help Key option is selected, the user will be able to see the text that is input on the Status Bar or they may press the F1 key to obtain help with the item.

The Run Macro on and Bookmark options are used to determine the order in which the Tab moves throughout the form.

Click OK to exit the Form Field Help Text dialog box.

Click OK again to exit the Text Form Field Options dialog box.

Continue this process to insert Regular Text Form Fields for the following areas.

Address
City
State
Zip
Email

Current Date-Time Form Field
When a Current Date Form Field is used in a form, the current date is automatically inserted. It is not possible to change this date. However, the length of the field and the format for the field can be specified.

Place the insertion point to the right of Date of Call in the form.

Click the Developer Tab.

In the Controls Group, click the Legacy Tools button (see illustration below left).

Click the Text Form Field button under Legacy Forms (see illustration above right).

The Field will be inserted next to the Date of Call button.

Click the Properties button in the Controls Group.

The Text Form Field Options dialog box will appear (see illustration next page top).

Change the Type option to Current Date.

Change the Maximum Length to the desired length.

Change the Date Format to an appropriate format.

Click the Add Help Text button to open the Form Field Help Text dialog box.

Click the Status Bar tab (see illustration next page bottom left).

Click in the text box under Type your own.
† When the text box is clicked, the **Type your own** option button is automatically selected.
† Click the **Help Key (F1)** tab (see illustration bottom right).

† Click the **Type your own** option button.
† In this box input something that will explain what the person filling out the form should do.
† Input the text for this option.
  ✺ When text is inserted into the **Status Bar** area of the dialog box, that text is displayed on the **Status Bar** of the window when the form has been protected.
  ✺ When the **Help Key** option is selected, the user will be able to view the text that is input on the **Status Bar** or they may press the **F1** key to obtain help with the item.
† The **Run Macro on** and **Bookmark** options are used to determine the order in which the **Tab** moves throughout the form.
Click OK to exit the Form Field Help Text dialog box.
Click OK again to exit the Text Form Field Options dialog box.

**DATE TEXT FORM FIELD**
This type of form field allows the user to insert the date. The length of the field and the format for the field can be specified. Place the insertion point to the right of Date of Call.
Click the Developer Tab.
In the Controls Group, click the Legacy Tools button (see illustration below left).

Click the Text Form Field button under Legacy Forms (see illustration above right).
The Field will be inserted next to the Date of Call button.
Click the Properties button in the Controls Group.
The Text Form Field Options dialog box will appear (see illustration below).

Click the drop-down list arrow for the Type box.
Select Date from the options that are available.
Change the Maximum Length by doing one of the following:
  • Click the spinner arrows until the desired size is displayed.
  • Select the number in the box and then input a new number.
Click the drop-down arrow for the Date Format field.
Click the desired date format from the list.
Click the Add Help Text button to open the Form Field Help Text dialog box.
Click the Status Bar tab (see illustration next page left).
Click in the text box under Type your own.
When the text box is clicked, the **Type your own** option button is automatically selected.

- Click the **Help Key (F1)** tab (see illustration above right).
- Click the **Type your own** option button.
- In this box input something that will explain what the person filling out the form should do.
- Input the text for this option.
  - When text is inserted into the **Status Bar** area of the dialog box, that text is displayed on the **Status Bar** of the window when the form has been protected.
  - When the **Help Key** option is selected, the user will be able to view the text that is input on the **Status Bar** or they may press the **F1** key to obtain help with the item.

- The **Run Macro on** and **Bookmark** options are used to determine the order in which the **Tab** moves throughout the form.
- Click **OK** to exit the **Form Field Help Text** dialog box.
- Click **OK** to exit the **Text Form Field Options** dialog box and save the changes.

**CREATE CALCULATED FIELDS WITHIN A FORM**

When working with calculated numbers, it is best to insert the Text Form Field into a separate cell from the explanation for the field.

**Insert Number and Calculated Fields**

When calculated fields are used, the cells are counted by column and row, even though all the rows might not have the same number of columns.

- Click the cell next to **Cost per semester hour**.
- Click the **Developer Tab**.
In the Controls Group, click the Legacy Tools button (see illustration previous page left).
Click the Text Form Field button under Legacy Forms (see illustration previous page right).
Click the Properties button in the Controls Group.
The Text Form Field Options dialog box will display (see illustration below).

Make the following changes in the dialog box:

- Type – Number
- Maximum Length – 8
- Number Format – One with dollar sign.
Click the Calculate on exit check box.
Click the OK button to exit the dialog box.
Click the cell next to Semester Hours.
Use the instructions from the previous page to insert the Form Field and open the Text Form Field Options dialog box.
Make the following changes in the dialog box:

- Type – Number
- Maximum Length – 3
- Number Format – One that is just a zero.
Click the Calculate on exit check box.
Click the OK button to exit the dialog box.

Calculate the Total Tuition
Click the cell next to Tuition.
Insert a Text Form Field.
Click the Properties button in the Controls Group.
When the Text Form Field Options dialog box appears, make the following changes:

- Type – Calculation
- Expression – =B6*B7
- Maximum Length - 10
- Number Format – One with dollar sign
Click the Calculate on exit check box to activate this option.
Click the Add Help Text button.
The **Form Field Help Text** dialog box will display (see illustration below)

* Click the **Help Key (F1)** tab to select it.
* In the **Type your own** text box, input something like, **Calculates the total tuition costs**.
* Click **OK** to exit the dialog box.
* Click the cell next to **Room and Board**.
* Insert a **Text Form Field** into this cell.
* Click the **Properties** button in the **Controls Group**.
* Make the following changes in the dialog box:
  * **Type** – **Number**
  * **Maximum Length** – 10
  * **Number Format** – One with dollar sign.
* Click the **Calculate on exit** check box.
* Click the **Add Help Text** button.
* Insert a statement into either the **Status Bar** or **Help Text** areas explaining the purpose of this form field.
* Click the **OK** button twice to exit both dialog boxes.
* Insert the same type of **Text Form Field** for **Books** as you did for **Room and Board**, using the same **Number Format** and **Maximum Length**.
* Make sure that the **Calculate on exit** check box is activated.

**Calculate the Total Costs**

* Click in the cell next to **Total Costs** and then insert a **Text Form Field**.
* Click the **Properties** button in the **Controls Group**.
* Select the following options for this field:
  * **Type** - **Calculation**
  * **Expression** - =B8+B9+B10 or =SUM(B8:B10)
  * **Maximum Length** - 12
  * **Number Format** - Option with dollar sign
Place a check mark next to **Calculate on Exit**.
Click **Add Help Text**.
Click the **Help Key (F1)** tab.
In the **Type your own** text box, input a statement similar to, **Calculates the total semester costs**.
Click the **OK** button to exit the dialog box.
Click the **OK** button again to exit the **Text Form Field Options** dialog box.

**CREATE A CHECK BOX FORM FIELD**
This type of form field is used to either select or deselect an item. When the item has been selected, an X will appear in the box. To deselect the item, remove the X from the field.
Place the insertion point next to the word **Yes** in the form.
Click the **Developer Tab**.
If the **Developer Tab** is not available:
  * Click the **File Tab**.
  * Click **Options** on the left side of the **File Menu** (see illustration at right).
  * Click the **Customize Ribbon** link.
  * In the **Main Tabs** area, click the **Developer** check box.
In the **Controls Group**, click the **Legacy** button arrow (see illustration below left).
Click the **Check Box Form Field** button in the **Legacy Group** (see illustration above right).
Click the **Properties** button in the **Controls Group**.
The **Check Box Form Field Options** dialog box will display (see illustration on next page).
Under **check box size** choose one of the options.
  * **Auto** – This option automatically sets the size for the check box.
  * **Exactly** – This option is used to choose a size for the check box.
Click one of the options under the **Default value** section.
  * **Not Checked** – This means that the check box will not be checked when the form is used.
  * **Checked** - This means the box will be checked when the form is used.
Make sure that **Check Box Enabled** is checked.
Click the **Add Help Text** button to open the **Form Field Help Text** dialog box.
Click the **Status Bar** tab (see illustration next page left).
Click in the text box under **Type your own**.
When the text box is clicked, the **Type your own** option button is automatically selected.
Click the **Help Key (F1)** tab (see illustration next page right).
Click the **Type your own** option button.
In this box input something that will explain what the person filling out the form should do.
Input the text for this option.
  * When text is inserted into the **Status Bar** area of the dialog box, that text is displayed on the Status Bar of the window when the form has been protected.
When the Help Key option is selected, the user will be able to view the text that is input on the Status Bar or they may press the F1 key to obtain help with the item.

- Click OK to exit the Form Field Help Text dialog box.
- The Run Macro on and Bookmark options are used to determine the order in which the Tab moves throughout the form.
- Click OK again to exit the Text Form Field Options dialog box.
- Copy this Check Box to the right side of No.
**DROP-DOWN FORM FIELD**

This type of Form Field is used when a list of items is desired. When this field is used, the person filling out the form can select from a specified list of items. Click the link for Form Controls to see an explanation of the buttons that are mentioned in this document.

- Place the insertion point to the right of **Major Interest**.
- In the **Controls Group**, click the **Legacy Tools** button (see illustration below left).

![Legacy Forms](image)

- In the **Legacy Group**, click the **Drop-Down Form Field** button (see illustration above right).
- The **Form Field** should appear in the proper location.
- With the control selected, click the **Properties** button in the **Controls Group**.
- The **Drop-Down Form Field Options** dialog box will display (see illustration below).

![Drop-Down Form Field Options](image)

- In the **Drop-Down Item** box, input the first major option, **Accounting**.
- Click the **Add** button to move the item to the **Items in drop-down list**.
- Use the same process to input the following items:
  - Art
  - Business Administration
  - Criminal Justice
- If the order of the items in the **Drop-down list** needs to be changed, click the arrows above and below the **Move** option on the right side of the dialog box.
- Make sure that the **Drop-down enabled** box is checked. This makes the list available to the person who is completing the form.
Click the **Add Help Text** button.
The **Form Field Help Text** dialog box will display (see illustration below left).
In the **Type your own** textbox, input **Select a major from the list**.
Select the text.
Hold down the **CTRL** key and then press **C** to copy the text.

Click the **Help Key** tab (see illustration above right).
Hold down the **CTRL** key and then press the letter **V** to paste the text into the **Type your own** box.

- When text is inserted into the **Status Bar** area of the dialog box, that text is displayed on the **Status Bar** of the window when the form has been protected.
- When the **Help Key** option is selected, the user will be able to see the text that is input on the **Status Bar** or they may press the **F1** key to obtain help with the item.

The **Run Macro on** and **Bookmark** options are used to determine the order in which the **Tab** moves throughout the form.

Click **OK** to exit the **Form Field Help Text** dialog box.
Click **OK** again to exit the **Drop-Down Form Field Options** dialog box.

**Record a Macro to Change Field Order**
Macros are used to change the order of the fields in a form. Before recording and running the Macro, Bookmarks must be added to the form.

**Create Bookmark**
- Double-click the **Books Text Form Field**.
- The **Text Form Field Options** dialog box will open.
- In the **Field Settings** section of the dialog box:
  - Double-click the **Bookmark** text box to highlight its contents.
  - Key in **Books**.
- Click the **OK** button.
Record Macros

✦ Make bookmarks for the Yes form field, the No form field, and the Name form field.
✦ Click the Developer Tab, if necessary.
✦ In the Code Group, click the Record Macro button (see illustration below).
✦ The Record Macro dialog box will appear (see illustration below).

[Image of Record Macro dialog box]

✦ Type MoveToBooks in the Macro name text box. The Macro name cannot contain any spaces.
✦ Click the Store macro in list arrow and click Online Forms Practice Exercise.
✦ Type Go to Books in the Description text box.
✦ Click OK to exit the Record Macro dialog box.

[Image of Bookmark dialog box]

✦ Click the Insert Tab.
✦ In the Links Group, click Bookmark (see illustration previous page left).
✦ The Bookmarks dialog box will display (see illustration previous page right).
✦ Click Books in the list of Bookmarks.
✦ Click the Go To button and then click the Close button.
Click the **Developer Tab**.
In the **Code Group**, click the **Stop Recording** button.

**Execute (Run) Macro in Form**
- The entire macro has been recorded. The next step is to tell Word to execute the macro whenever the **Tab** key is pressed in the **Room and Board Text Form Field**.
- Double-click the **Room and Board Text Form Field**.
- The **Text Form Field Options** dialog box will display (see illustration).

Click the **Exit** list arrow in the **Run Macro on** section of the dialog box.
Click the **MoveToBooks** macro name.
Click the **OK** button to return to the document window.
Record macros for the form fields in the list below. Make sure to save the macros in the **Online Forms Practice Exercise** document.

- Record a macro for the **Yes** bookmark. Name this macro **MoveToYes**.
- Record a macro for the **No** bookmark. Name this macro **MoveToNo**.
- Record a macro for the **Name** bookmark. Name this macro **MoveToName**.

double-click the **Books** form field and have it **Exit to MoveToYes**.
double-click the **Yes** form field and have it **Exit to MoveToNo**.
double-click the **No** form field and have it **Exit to the MoveToName macro**.

**Protect and Unprotect the Form Document**

Once a form has been completed, the document must be protected before information can be entered into it. To protect the form, it cannot be in Design Mode. Therefore, Design Mode must be turned off before Protection can be applied.

**Protect the Form**

Once a form has been completed, the document must be protected before information can be entered into it. To protect the form, it cannot be in Design Mode. Therefore, Design Mode must be turned off before Protection can be applied.

Click the **Developer Tab**.
In the Controls Group, click the Design Mode button to deactivate it.

In the Protect Group, click the Restrict Editing button (see illustration at right).

The Restrict Formatting and Editing Task Pane will open.

In Section 2 of the Task Pane, click the Allow only this type of editing in the document checkbox (see illustration on next page).

The list box below the check box will become active.

Additional text will appear below that.

Click the Section 2 arrows (see illustration below left).

Click Filling in Forms.

When protecting the entire document, it must be specified that it is protected for Filling in Forms.

This means the user will be able to enter content in the Content Controls and Form Fields.

The Start Enforcement button in Section 3 becomes active (see illustration above right).

Click the Yes, Start Enforcing Protection button.

The Start Enforcing Protection dialog box will open (see illustration below).

To keep others from turning off protection for the form, input a password in the Enter new password box.

To confirm the password, input the same password into the Reenter password to confirm.

Click the OK button to close the dialog box without making any changes.
Unprotect the Form
If changes need to be made to a form, it has to be unprotected. To do this:
✦ Click the Developer Tab.
✦ In the Protect Group, click the Restrict Editing button.
✦ The Restrict Formatting and Editing Task Pane will display.
✦ At the bottom of the Task Pane, click the Stop Protection link.
✦ If a password was specified the Unprotect Document dialog box will appear.
✦ Input the password into the dialog box (see illustration below)
✦ Click OK.
✦ Protection should be removed from the form.

Fill in the Form
Once a form has been designed, it is important to test it to make sure there aren’t any glitches in the form. The form must be protected before it can be filled in.
✦ Open the form.
✦ Click in the first Form Field or Content Control.
✦ Fill in the information.
✦ Press the Tab key on the keyboard to move to the next field in the form.
✦ Because Calculate on exit was chosen for the number and calculations fields, the results of the calculations should be filled in when the tab key is pressed.
✦ Continue this procedure until the form is completed.
✦ Save the form in the same way that other Word documents are saved.

Save the Form as a Template
A form can be saved as a template or as a regular document in a document folder. To save the document as a template:
✦ Start a new document, or open the document or template that the new template is to be based on.
✦ Start a new document, or open the document or template that the new template is to be based on.
✦ Click the File Tab.
Click the Save or Save As link. 

or

Click the Save button on the Quick Access Toolbar (see illustration at right). 

The Save As window will display (see illustration below).

Do one of the following: 

- Click the Computer button. 
- Click the folder under Current Folder. 
- Click one of the folder names under Recent Folders. 

The Save As dialog box will display.

In the File Name box, input a name for the document (see illustration below).

Click the Save as type list arrow. 

Select Word Macro Enabled Template (*.dotm). 

By default, the Template will be saved to the Custom Office Templates folder. 

To change the folder, click the list arrow at the end of the location and select a new location. 

Click the Save button.
SEND THE FORM TO OTHERS USING E-MAIL

A form may be sent to others as an attachment using either Outlook or Word. When using the Word e-mail option, complete the steps below to send the form to others.

† Open the form in **Word**.
† Click the **File Tab**.
† Click the **Share** button.
† The **Share** window will display (see illustration).

† Click the **E-mail** option.
† Click the **Send as Attachment** button (see illustration above).
† The **Email Message** window will open.
The ribbon at the top of the window should be the one that is displayed in a message box in Outlook.

In the **To** box, input the address of the person(s) to whom the message is being sent.

or

Click the **To** button and select a name from the **Global Address List** or a **Contacts** list.

The name of the **Form** should appear in the **Subject** box.

The **Form** should display as an attachment in the **Attachment** box.

In the **Message Box**, input instructions for the person(s) to whom the message is being sent.

Click the **Send** button.