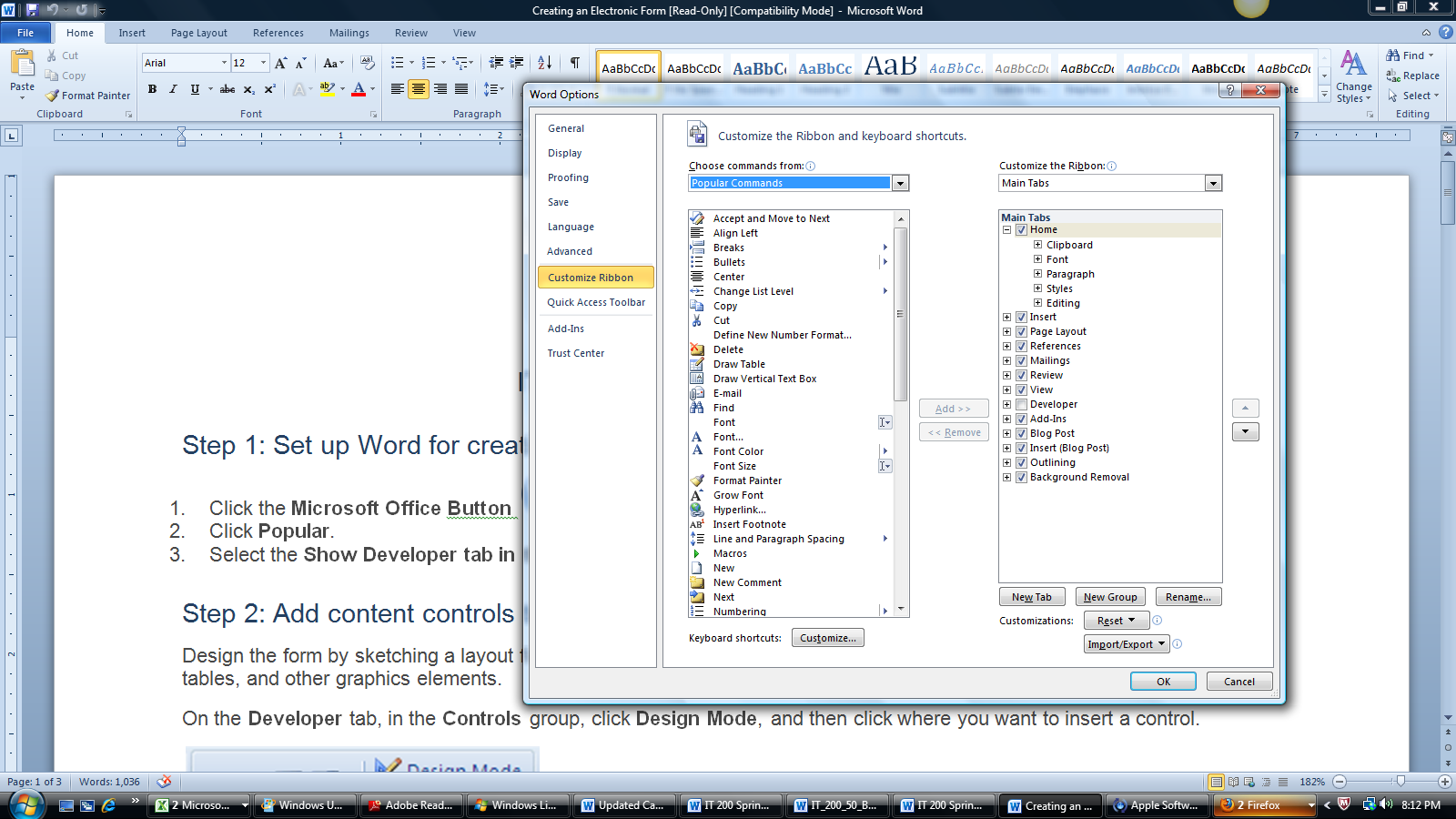
IT 200 - Creating an Electronic Form

Online Form

Step 1: Set up Word for creating forms

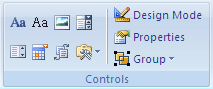
1. Click the **File and then Options**.
2. Select Customize Ribbon Command.
3. Customize the Ribbon appears on the right side of the dialog box. Select Developer.



Step 2: Add content controls to the form

Design the form by sketching a layout first, or use an existing form as a guide.

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

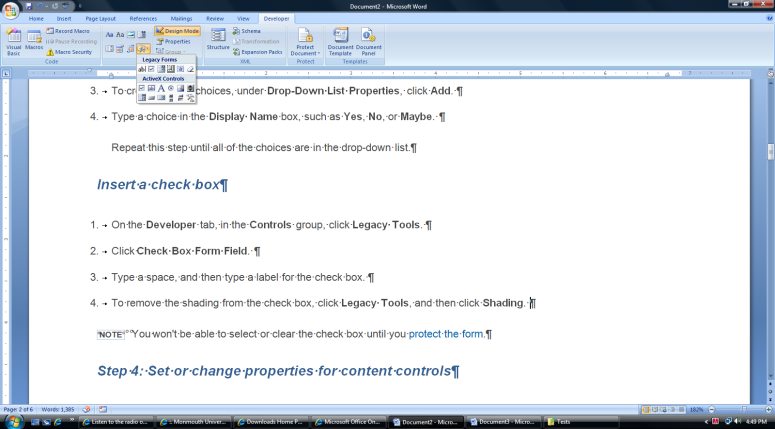


Do any of the following:      

***Insert a text control where users can enter text***

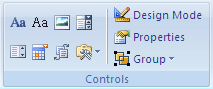
1. On the **Developer** tab, in the **Controls** group, click the **Rich Text** control Ribbon imageor the **Text** control Ribbon image.

***Insert a text fill-in field***

1. On the **Developer** tab, in the **Controls** group, select legacy controls.
2. Click on **Text Form Field**.
3. In the **Controls** group, click **Design Mode**, and then do any of the following:
   * To add a line under the field, select the field, and then click **Underline** in the **Font** group on the **Home** tab.
   * To limit the amount of information a person can type in the field, set a maximum width by selecting the field, clicking **Properties** in the **Controls** group, and entering a value under **Maximum length**.
   * To make the field look as long as its maximum length, add instructional text by clicking **Properties** in the **Controls** group, and typing text, such as **Type your first name here**, under **Default text**.

***Insert a drop-down list that restricts available choices to those you specify***

1. On the **Developer** tab, in the **Controls** group, click the **Drop-Down List** control Button image.
2. Select the content control, and then on the **Developer** tab, in the **Controls** group, click **Properties**.



1. To create a list of choices, under **Drop-Down List Properties**, click **Add**.
2. Type a choice in the **Display Name** box, such as **Yes**, **No**, or **Maybe**.

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

***Insert a check box***

1. On the **Developer** tab, in the **Controls** group, click **Legacy Tools**.
2. Click **Check Box Form Field**.
3. Type a space, and then type a label for the check box.
4. To remove the shading from the check box, click **Legacy Tools**, and then click **Shading**.

***Step 4: 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.

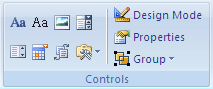
1. Right-click the content control that you want to change.
2. Click **Properties**, and change the properties that you want.

***Step 5: Add instructional text to the form***

Instructional text can enhance the usability of the form you create and distribute. You can change the default instructional text in content controls.

To customize the default instructional text for your form users, do the following:

1. On the **Developer** tab, in the **Controls** group, click **Design Mode**.



1. Select the content control in which you want instructional text to appear. Edit the placeholder text and format it any way you wish.
2. If you want the content control to disappear when someone types in their own content to replace your instructions in a Rich Text control or a Text control, click **Properties** in the **Controls** group, and then select the **Remove content control when contents are edited** check box.
3. On the **Developer** tab, in the **Controls** group, click **Design Mode** to turn off the design feature and save the instructional text.

***Add protection to a form and prepare it for distribution***

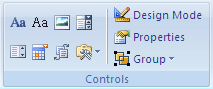
You can protect individual content controls in a form template to help prevent someone from deleting or editing a particular content control or group of controls, or you can prepare a form to be distributed and filled out by locking it. You can help protect all of the form template content with a password.

***Protect parts of a form***

1. Open the form that you want to protect.
2. Select the content control or the group of controls to which you want to restrict changes.

To group several controls, select the controls by pressing SHIFT and clicking each control that you want to group. On the **Developer** tab, in the **Controls** group, click **Group**, and then click **Group**.

1. On the **Developer** tab, in the **Controls** group, click **Properties**.



1. In the **Content Control Properties** dialog box, under **Locking**, do either of the following:
   * Select the **Content control cannot be deleted** check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the template.
   * Select the **Contents cannot be edited** check box, which allows you to delete the control but does not allow you to edit the content in the control.

***Prepare a form to be filled out***

1. Open the form that you want to lock so that it can be filled out.
2. On the **Developer** tab, in the **Protect** group, click **Protect Document**, and then click **Restrict Formatting and Editing**.



1. In the **Protect Document** task pane, under **Editing restrictions**, select the **Allow only this type of editing in the document** check box.
2. In the list of editing restrictions, select **Filling in forms**.
3. Under **Start enforcement**, click **Yes, Start Enforcing Protection**.
4. 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.

Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better. It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.

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