

Creating Forms for Online Input

TRIAD Consulting

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Creating Forms in Microsoft Word

You can create electronic forms in many of the Office applications. But forms created in Word have a winning advantage over forms created in the other applications: a vastly larger number of potential users. Word is the most used office application, and might be the only application other than Solitaire that home users are comfortable with. If you're creating forms to email to a diverse group of users, Word is your best bet.

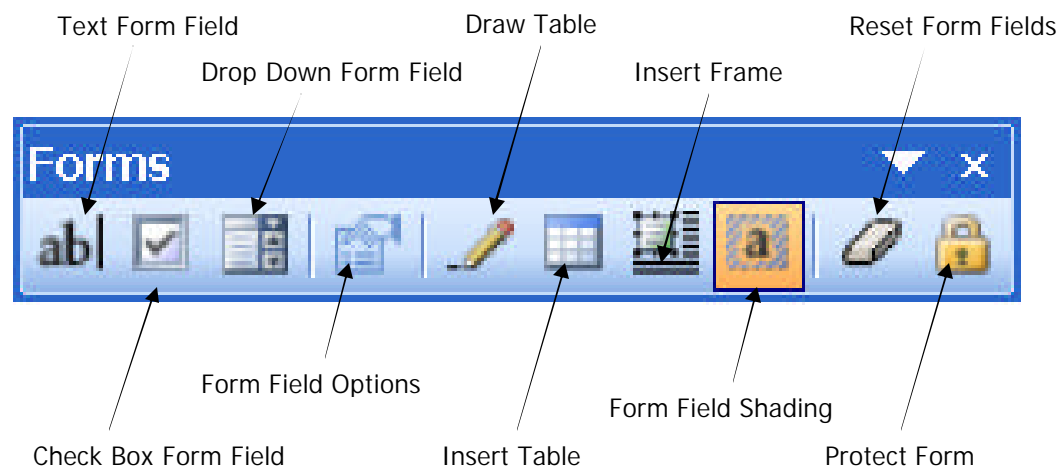
Fortunately, it's easy to create forms in Word. Here are the steps:

- Use tables to layout the form
- Use borders and shading to create lines and boxes for users to enter information
- Add form controls from the Form toolbar
- Protect and lock the form
- Distribute the form

Some users assume you need Excel if your form includes formulas, but this isn't true. Word forms support basic calculation: Addition (including a SUM function), Subtraction, Multiplication, and Division. If your form must include complex formulas (for example, a form that estimates mortgage payments), use Excel. But for simple arithmetic, Word is sufficient.

Understanding the Word Form Controls

Choose View > Toolbars or right click any toolbar to display the shortcut menu. Choose Forms to display the Forms toolbar:



There are two sets of form controls in Word. While the Control Toolbox includes many additional control types, all the controls require VB to actually do anything. For this session, we'll limit ourselves to the Forms control set, which includes three form field controls:

Name	Description	Example
Text Form Field	Text data: letters, numbers, dates	User name, birth date, account number, city
Check Box Form Field	Logical data	Any yes/no choice: "Call me" or "I am over the age of 18"
Drop Down Form Field	A list of text choices	State names, credit card types

Using Tables as Your Form's Foundation

Tables have two roles in forms: layout and data entry areas. Use tables as you would when creating a web page: to align form elements like text and images. Display and hide cell borders to create data entry areas in your form. Why use cell borders? Because the borders don't move, which isn't true of line objects (created with the Drawing tools) or underscores:

Name: Gini Courter
 Email: _____

If you're beginning with an existing form, start by analyzing the form to determine how many rows and columns are required to display the labels (text) and blanks needed in the form. Include a column for each column of data or labels, as well as extra columns to provide vertical spacing. For example, this section of the form will need 7 columns:

<u>Date</u>		<u>ITEM</u>				<u>\$ Amount</u>	<u>GL Account</u>

1. Date
2. Spacer column
3. Item
4. Spacer column
5. \$ Amount
6. Space column
7. GL Account 3

Don't worry too much about the rows -- you can add rows easily later without messing up your form's layout. Some forms are easier to create as a series of tables. Analyze each section to determine the number of columns required before creating the tables.

Providing User Clues with Borders and Shading

After creating the tables and adjusting columns (don't forget to use the Merge Cells and Split Cells features on the Table menu!) enter data in the appropriate cells. As an example, here's the table that provides the top section of our form. We've added borders and shading so you can see the blank rows and extra cells, inserted to provide space in the form:

Today's Date			Date Rec'd in Acct.		
Name/Payee					

check if new address	Street Address							
	City		State		Zip Code			
Reason for Expense								

Now you need to decide how much the form should look like a table when it's printed/viewed on screen. We choose to keep a table-like format for the bottom section, but put boxes on the top for user input. Use the Borders and Shading toolbars to format the table.

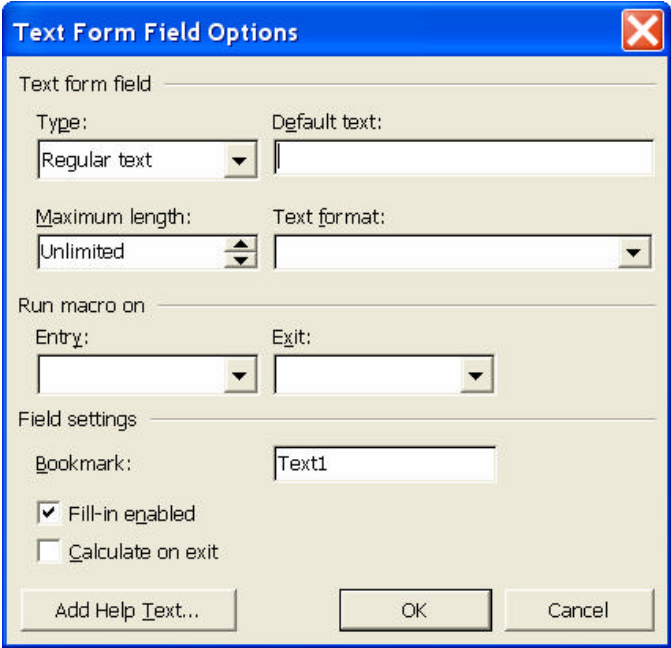
Adding Form Controls

Now it's time to add controls to the form. For text fields, click in the form where you want to position the form then click the Text Box Form Field control on the Forms toolbar. Do the same for CheckBox Form Fields and Drop Down Form Fields.

Setting Field Properties

For each field, click on the field then click the Properties button, or double click the form field to open the Properties dialog box.

If the field will be used as part of a calculation, two things are important: first, set the type to Number or one of Date types. Then, give the field a really good bookmark name. For example, in form all the Expense Amount fields are named ExpN so we could easily use the names later when creating the formulas to calculate total expenses.



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Adding Calculated Fields

For calculated fields, choose the Calculation type. In the Default Text text box, enter a formula using the bookmark names. For example, to add Exp1 and Exp2, enter the formula =Exp1+Exp2. The order of operations works here, so if a formula includes multiplication/division and addition/subtraction, use parentheses to indicate when addition/subtraction should occur before multiplication/division.

Enabling Calculation

After adding the calculated fields, you'll need to set the properties for fields that should trigger a calculation. Open the Properties and enable the Calculate On Exit checkbox.

Locking Your Form

To lock the form, click the Protect Form button on the Forms toolbar. When the form is locked, users tab from field to field -- easy for them, easy for you. Lock the form, then check the tab order.

Navigation Tips

With complex forms, you might want to change the Tab order so that when you leave field **X**, the insertion point moves to field **J**. To do this, you must record a macro that goes to field **J**, then assign that macro as an action when exiting field **X**. Here are the steps to record the macro:

1. Make sure you know the name of the field you want to go to.
2. Choose Tools > Macro > Record New Macro.
3. Name the macro -- for example, GoToFieldJ.
4. Change the Save In location to the current document.
5. Choose Edit > GoTo from the menu.
6. Choose Bookmarks. Select field **J** from the list of Bookmarks.
7. Click OK to go to the field.
8. Click the Stop button to save the macro.

Now, open the properties for field **X**. In the Exit drop down, choose your macro. Click OK.

Distributing Your Form

If you created the form for your own use, save it as a template. Choose File > Save As and choose Template from the Save As Type drop down list. Word immediately switches to your templates folder so you can save the form as a template. When you choose File > New and select the template, Word opens a copy. If you created the form to email to others, save it as a regular Word document.

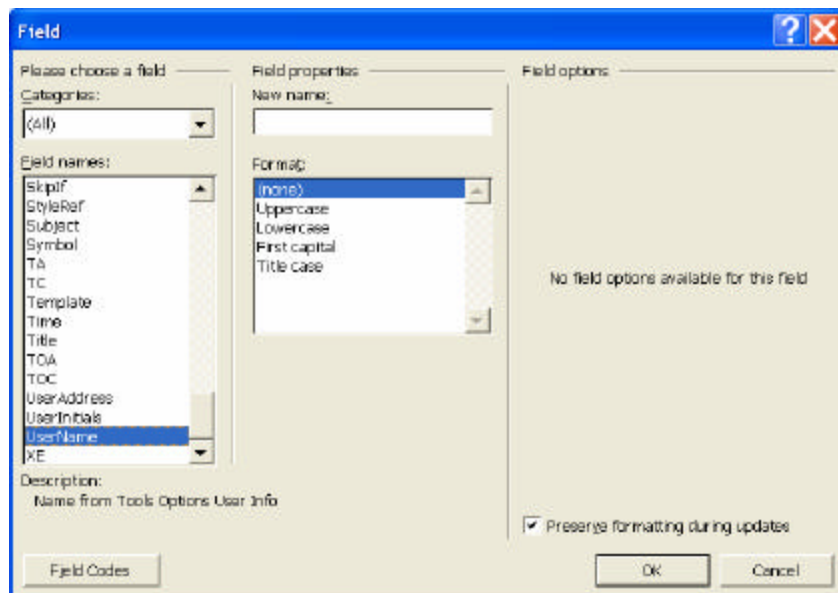
Other Fields You Can Add to Forms

A form can use any of the fields included in Word. For example, rather than making the user enter her name, you can insert the UserName field in the appropriate place in your document.

To add a Word field, position the insertion point and choose Insert > from the menu to open Insert Field dialog box.

Scroll to the field you want to insert. Set formatting options (if any), then OK to insert the field.

Press Alt+F9 to toggle between the field codes and results.



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For information on creating forms using VB and the Control Toolbox, see this article:
http://msdn.microsoft.com/library/default.asp?url=/library/en-us/dnword2k2/html/odc_activex.asp

Creating Adobe Acrobat PDF Forms

Why PDF?

- Exchange nearly any type of document
- Password-protect and digitally sign a document
- Set options that prevent it from being copied, edited, or printed
- Insert hyperlinks and bookmarks for simpler navigation through large documents
- Nearly everyone has a program for viewing PDF files
 - Adobe Systems has given out over 500 million copies of its free PDF reader, Adobe Reader.

PDF Maker Software

- Adobe Acrobat Standard (\$299)
- Adobe Acrobat Professional (\$449)
- Adobe opened the source code so many products are now available

Creating a PDF Document

- It's as simple as printing!
- PDF makers install a printer driver on your computer
- To create a pdf, choose the pdf maker as the printer and print the document.
- You are prompted to save the document to a file location.

Create Online Forms

1. Layout a form in Word using tables
2. Print the form as a pdf
3. Open the pdf in Acrobat
4. Click the Form tool
5. Drag a box where you want the form field to appear
6. Enter the properties of the field
7. Press Enter to create the field
8. Press the Hand tool to switch out of Form view

Form Tips

- Turn on gridlines and snap before creating fields
 - View > Grid and View > Snap To Grid
- To create rows of fields as in an expense report:
 - Create the first row
 - Hold Shift and drag a box around the row
 - Hold Ctrl and drag the selection box to the size you want and then click. The table fills with cells.
- Set tab order (Tools > Forms > Fields > Tab Order) by clicking the cells in order

General Acrobat Tips

- Get a good head start before attempting a cartwheel
- Stick your tumbling runs to avoid deductions
- Mount and dismount are not the same – know the difference!

(Just wanted to see if you were awake!)

More Useful Acrobat Tips

- Set Document Open Options to control how a form opens (File ➤ Document Properties ➤ Open Options)
- Set Document Security options to prevent readers from printing, copying or changing the document (File ➤ Document Security and choose Acrobat Standard Security)