

Traditionally, forms are printed on paper and filled in by pen. These days, however, many of the forms that were once printed and posted are now transmitted and stored electronically, or even completed online. Many of these electronic forms are used to extract data and will never be printed (one step closer to the paperless office, perhaps?). It therefore becomes necessary to understand document production techniques when working in a purely digital environment.

Word allows you to create **electronic forms** which, instead of being filled in on paper, are actually completed on the screen. These types of **electronic forms** differ to normal documents in that they direct the user to the areas of the form they need to complete through the use of **content controls**.

**In this session you will:**

- ✓ gain an understanding of electronic forms in **Word**
- ✓ learn how to create a structure for the form
- ✓ gain an understanding of content controls
- ✓ learn how to display the **Developer** tab
- ✓ learn how to add text controls
- ✓ learn how to set content control properties
- ✓ learn how to insert the **Date Picker** control
- ✓ learn how to insert prompt text
- ✓ learn how to insert formulas
- ✓ learn how to add a combo box
- ✓ learn how to insert a drop-down list control
- ✓ learn how to protect and save a form
- ✓ learn how to complete an electronic form
- ✓ learn how to edit a protected form
- ✓ learn how to delete a content control.

# UNDERSTANDING ELECTRONIC FORMS IN WORD

You can use **forms** for many types of standard business documents, such as invoices, orders, applications and registrations, and much more. **Content controls** enable the form to be filled in

on-screen, saving the user time and paper. Forms, however, are not the most intuitive to create and you need a little understanding of the underlying theory in order to use them to their full potential.

## What Is An Electronic Form In Word?

An **electronic form** is a type of document—generally laid out using **tables**—that contains text and **fields** (content controls) to insert specific types of data and guide the user through completing the form. Normally, the form design has been saved as a template and you will create a new document based on that template before completing or distributing the form. In addition, the document has been protected so that access is granted only to the parts of the document that need to be filled in.

## So What Happens To The Data When The Form Is Completed?

Electronic forms in Word are not generally used to capture and analyse data. So, once a user has completed the form, the data is retained in that document. Word forms are therefore ideal for things such as quotation letters, proposals, small business invoices, and the like, where there is no need to dredge through and analyse all of the collected data. If you need forms where you intend to capture data for later analyses then you should create forms in either Excel or Access.

## How Are Word Forms Created?

There are essentially three main steps to creating forms in Word.

### Step 1: Create the form

Forms consist of **labels** that identify the type of data required (such as **First name**), as well as a **field** or cell (or box) to enter the required data. The easiest and most effective way to set up a form in Word is to use tables. The first step, therefore, becomes creating the form, or table, that will hold the **data** and **data input fields**.

### Step 2: Insert data input fields

Once the form has been created you will know what **content controls** are required and where they should be placed. Content controls are like boxes into which the user will either type information or choose information from a list. You can recognise a content control by the grey text that appears on the form, such as **Click here to enter text** or **Select your name**.

There are several types of content controls: text controls, drop-down lists and combo boxes, and a date picker, for example. Text controls are used to type information; drop-down lists and combo boxes present information in a list and all the user has to do is to click on the desired choice; and a date picker provides a calendar from which you can pick a date.

### Step 3: Protect the form and save it as a template

Once the content controls have been placed the form can be protected – this is a simple step and basically prevents all parts of the document from being changed except for the controls. Saving the form as a template means that new documents can be created from the original form. For example, if you have created a quotation form you will most likely want to use it for creating many quotations in the future.

An example of an invoice form, where **tables** are used to construct the form and **input data fields** indicate where text should be entered

# CREATING THE FORM LAYOUT

You start to create an **electronic form** in Word just like you would any other document. However, to allow for the precise alignment of text and **content controls**, and for easier form

navigation, forms are best placed in tables. The basis of any form is the elements that will not change, such as the text, the table and any formatting.

## Try This Yourself:

**Open File**


Before starting this exercise you **MUST** open the file *W880 Forms\_1.docx...*

**1**

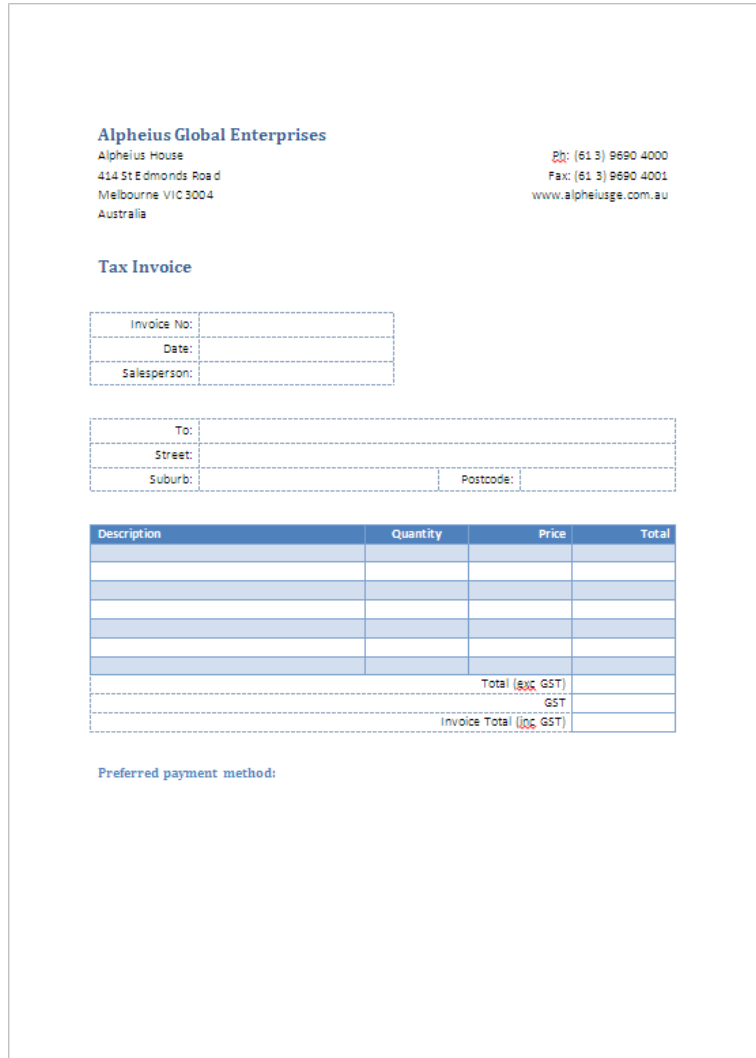
Examine the document

Our case study form will be based on an invoicing example. To save time, the structure has already been created for you in this document...

**2**

If the table gridlines are not visible, click in the table then click on the **Layout** tab and click on **View Gridlines**  in the **Table** group

The gridlines help you visualise where the content controls will be placed to create your form



**1**

## For Your Reference...

To **create** a **form**:

1. Create a new document and type the text required for the form. Use tables as a structure into which the content controls can be placed

## Handy to Know...

- Because gridlines don't print, you can get an idea of how the form will look when it's printed by hiding the gridlines.

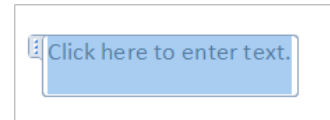
# UNDERSTANDING CONTENT CONTROLS

**Content controls** can be inserted into a document or form to make the task of data entry quicker and easier. You can show users exactly where they need to add information and even

provide drop-down lists of options for users to select from. So that you know which control to use for which purpose, here is an explanation of each of them.


## Rich Text

**Rich text** controls allow users to enter paragraphs of text. You can even apply formatting to text once you've typed it.



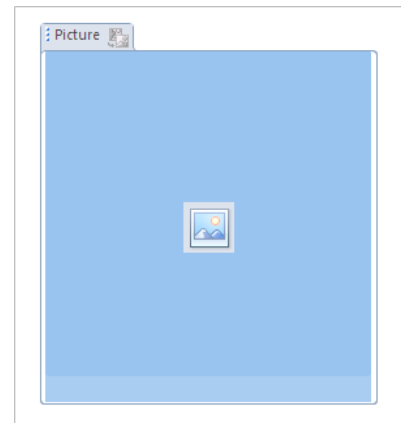
**Rich Text and Plain Text control:** users can click and start typing the required text

## Plain Text

**Plain text** controls are used for plain text or text that you want formatted the same way. It is probably the most commonly-used control. When active in a document, **Rich Text** controls and **Text** controls are identical in appearance. (However, you can tell the difference by how they behave and by clicking on **Properties**  in the **Controls** group on the **Developer** tab.)

## Picture

**Picture** controls are used for inserting any graphic, such as a drawing, shape, chart, table, clip art, SmartArt, photograph or illustration. They're also ideal for ID photographs.



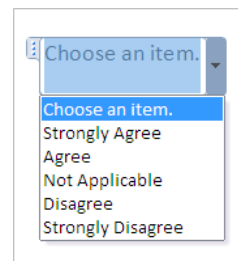
**Picture control:** users can double-click on the control to locate and insert a picture

## Combo Box

**Combo boxes** provide a text box that users can either type into or select an option from a list.

## Drop-Down List

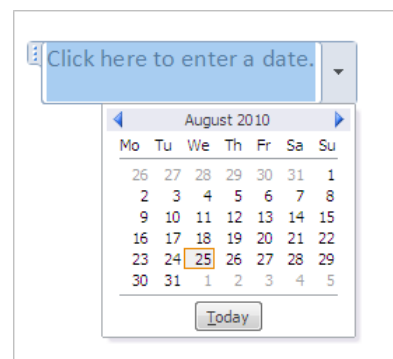
**Drop-down lists** provide a list of options that you can select from. Unlike combo boxes, you are restricted to the options in the list and can't type directly into this control. Combo boxes and drop-down lists are identical in appearance when they appear on a form.



**Combo box and Drop-down list controls:** users can click on the control to display and select from a menu of options

## Date Picker

The **Date Picker** control provides a calendar that enables you to select a date, or click on **[Today]** to insert today's date. You can also specify the format that you want the date to appear in.



Users can click on the **Date Picker** to display a calendar and select a date

## Check Box

The **Check Box** control enables the user to select an option by ticking a box. The Check Box control is ideal where users have to select either **Yes** or **No**, for example.

## Building Block Gallery

The **Building Block Gallery** control displays the contents of the gallery that you nominate. This could be **Quick Parts** or any custom gallery that you create. It allows you to insert any building block from the gallery.

## Content Control Properties

Each content control contains **properties** that you can set to modify the way that the control behaves. For example, you can create or modify a **Title** for each control. You can specify a style to apply automatically to whatever the user enters. You can make text controls disappear once the person had entered the details. You can even lock controls so that they can't be edited or deleted. In **Design Mode** you can even change the prompt text (e.g. Choose an item) that appears in the control.

# DISPLAYING THE DEVELOPER TAB

Many of the advanced features of Word, especially those used for working with templates, forms, macros and document protection, are found on the **Developer** tab. This tab is hidden

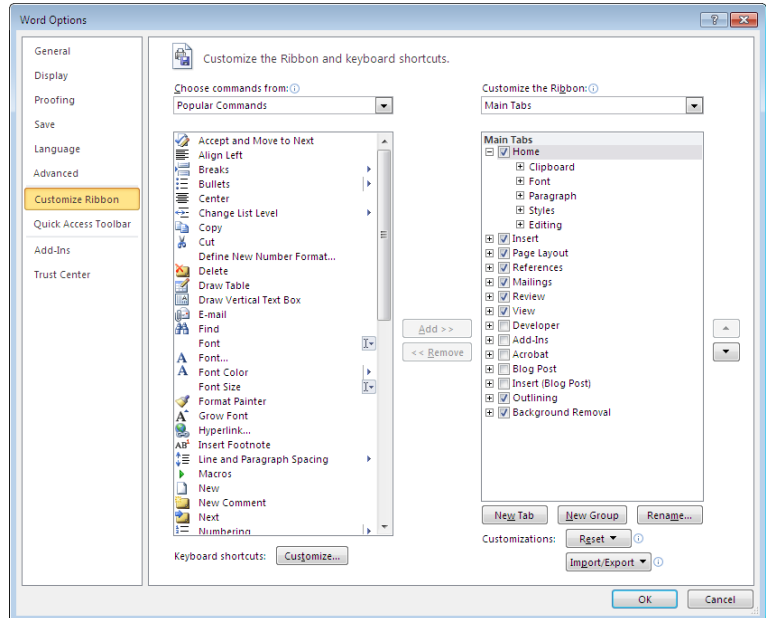
by default, so don't worry if you can't see it. The **Developer** tab can be displayed by accessing the **Word Options** and customising the **Ribbon** to include the **Developer** tab.

## Try This Yourself:

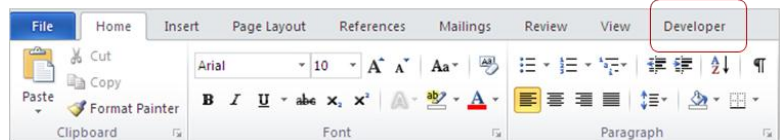
**Open File**

Before starting this exercise you **MUST** open the file *W880 Forms\_1.docx...*

- 1 Examine the **Ribbon**  
There will be series of tabs across it. We're assuming that the **Developer** tab is not one of them...
- 2 Click on the **File** tab, then click on **Options** to open the **Word Options** dialog box
- 3 Click on **Customise Ribbon** to display options for working with the **Ribbon**
- 4 Click on the check box for **Developer** in **Customise the Ribbon** so that it appears with a tick
- 5 Click on **[OK]**  
The **Developer** tab will appear at the right-hand end of the **Ribbon**



3



5

## For Your Reference...

To **display** the **Developer** tab:

1. Click on the **File** tab, then click on **Options**
2. Click on **Customise Ribbon** and then click on the check box for **Developer** in **Customise the Ribbon** so that it appears with a tick, then click on **[OK]**

## Handy to Know...

- To hide the **Developer** tab, click on the **File** tab and then click on **Options** to open the **Word Options** dialog box. Click on **Customise Ribbon** and then click on the checkbox next to **Developer** in **Customise the Ribbon** to remove the tick, and then click on **[OK]**.

# INSERTING TEXT CONTROLS

The **Plain Text** and **Rich Text** controls are the most commonly-used content controls. These **Text** controls provide the user with an input area where text can be entered, and text can be either

numbers and/or letters. **Text** controls are used where small items of text are required, such as a name, street address, invoice number or a brief description.


## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_1.docx...*


**1** Click on the **Developer** tab  
The **Controls** group contains the tools that we need to insert content controls in the form...

**2** Click in the empty cell to the right of **Invoice No** in the first table

**3** Click on **Plain Text**  to insert a **Plain Text** content control  
A **Plain Text** content control will be inserted into the form...

**4** Repeat steps **2** and **3** for the following:  
**To**  
**Street**  
**Suburb**  
**Postcode**

**5** Click in the first cell below **Description**

**6** Click on **Plain Text** 

**7** Repeat steps **5** and **6** for the rest of the **Description** cells

**8** Save the form

**3**

Invoice No:	Click here to enter text.
Date:	
Salesperson:	

**4**



To:	Click here to enter text.		
Street:	Click here to enter text.		
Suburb:	Click here to enter text.	Postcode:	Click here to enter text.

**7**




Description	Quantity	Price	Total
Click here to enter text.			
Click here to enter text.			
Click here to enter text.			
Click here to enter text.			
Click here to enter text.			
Click here to enter text.			
		Total (exc GST)	
		GST	
		Invoice Total (inc GST)	

## For Your Reference...

To **add** a **text control**:

1. Position the cursor where you want the **Text** content control to appear
2. Click on the **Developer** tab, then click on **Plain Text**  or **Rich Text**  in the **Controls** group

## Handy to Know...

- **Plain Text**  retains the required formatting and does not allow users to format the data, whereas **Rich Text**  allows users to format the text they've entered.
- Once you have inserted a content control, you can repeat this action by positioning the cursor and pressing .

# SETTING CONTENT CONTROL PROPERTIES


Every **content control** contains properties that you can apply to change the way that a content control appears and behaves. For example, you can add a **Title** to a **Text** content control so that it

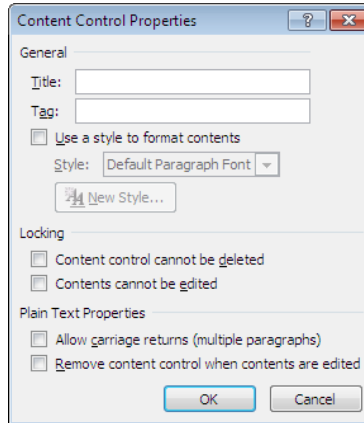
clearly indicates the information required, and you can specify a default style to apply to the text. You can even tell Word to remove the content control once text has been entered.

## Try This Yourself:

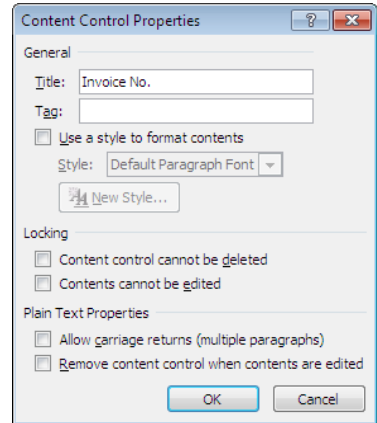
Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_2.docx...*

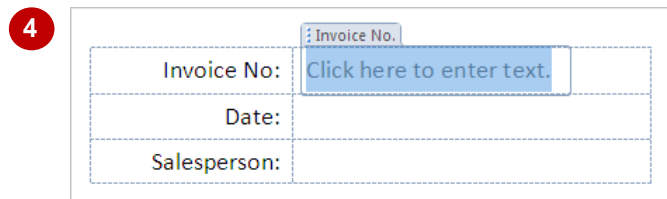
- 1 Click in the text content control for **Invoice No.** to select it
- 2 Click on **Properties**  in the **Controls** group to display the **Content Control Properties** dialog box
- 3 Type **Invoice No.** in **Title**
- 4 Click on **[OK]** to apply the change  
*Invoice No. now appears as a label above the content control...*
- 5 Click outside the control to deselect it  
*When it isn't selected, it looks quite unchanged...*
- 6 Repeat steps 1 to 4 to add **Titles** to the following text controls: **To**, **Street**, **Suburb** and **Postcode**
- 7 Save the form



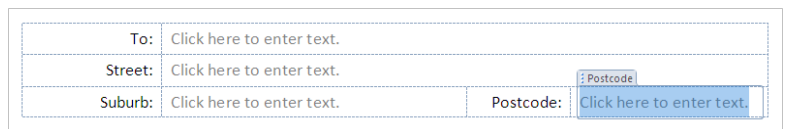
2



3




4



6

## For Your Reference...

To **set content control properties**:

1. Click in the content control to select it
2. Click on **Properties** 
3. Adjust the properties as required
4. Click on **[OK]**

## Handy to Know...

- Other options in the **Content Control Properties** dialog box include using a particular style to format the content, **locking** the control so that it cannot be edited or deleted, as well **deleting** Plain Text controls once data has been entered.



# INSERTING THE DATE PICKER CONTROL

If you need users to insert a date in a form, Word makes it easy by providing a **Date Picker** content control. This provides access to a drop-down calendar so that the user can click on the date

they want, as well as a **[Today]** button that inserts the current date. You can also use the properties to format the date according to your organisational standards or document needs.


## Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *W880 Forms\_3.docx...*

**1** Click in the cell next to **Date** to position the cursor

You will insert the Date Picker here...


**2** Ensure the **Developer** tab is active, then click on **Date Picker**  in the **Controls** group

The control will be inserted, which includes a drop arrow that users can click on to access the calendar. Let's test drive it...

**3** Click on the drop arrow  for the date control to display the **Calendar**

The calendar will show the current month and outline today's date in red. You can use the calendar to locate a specific date or insert today's date with a single click...

**4** Click on **[Today]** to insert today's date

**5** Select the date text and then press  to delete the date, then click outside the control to deselect it, then save the form

**1**

Invoice No:	Click here to enter text.
Date:	
Salesperson:	

**2**

Invoice No:	Click here to enter text.
Date:	Click here to enter a date. ▾
Salesperson:	

**3**

Invoice No:	Click here to enter text.
Date:	Click here to enter a date. ▾
Salesperson:	
To:	Click here to enter text.
Street:	Click here to enter text.
Suburb:	Click here to enter text.

August 2010

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

**4**


Invoice No:	Click here to enter text.
Date:	25/08/2010 ▾
Salesperson:	

**5**


Invoice No:	Click here to enter text.
Date:	Click here to enter a date.
Salesperson:	

## For Your Reference...

To **insert** a **Date Picker** control:

1. Position the cursor where you want the **Date Picker** to appear
2. Ensure the **Developer** tab is active, then click on **Date Picker** 

## Handy to Know...

- The default date format is **D/MM/YYYY** which gives you a date like 7/10/2010. You can access and change the properties, including the date format, by clicking on **Properties**  when the **Date Picker** control is active.



# INSERTING PROMPT TEXT




Content controls appear with generic **prompt text** when you first insert them. Prompt text is designed to prompt the user to insert specific information, as well as to guide the user as to

what type of information they need to enter and the required format for that entry, if required. You can insert any prompt text that you like. This will replace the generic prompt text.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_4.docx...*

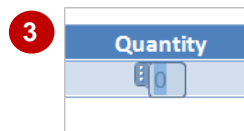
- 1 Click in the cell immediately below **Quantity** and click on **Plain Text**  in the **Controls** group to insert a text content control
- 2 Click on **Design Mode**  to access the prompt text and type **0**  
*You will notice that all content controls become editable. In Design Mode you can type the prompt text that will be displayed to the user, which will replace the generic prompt text...*
- 3 Click on **Design Mode**  to turn it off then click on the tab of the control to select it  
*When selected, the control will change to a darker colour...*
- 4 Press **Ctrl** + **C** to copy the control
- 5 Press **↓** to move down to the next cell and then press **Ctrl** + **V** to paste the control
- 6 Repeat step 5 to complete the column
- 7 Repeat steps 1 to 6 for the **Price** column, replacing the prompt text with **\$0.00**

Description	Quantity	Price	Total
Click here to enter text.	Click here to enter text.		
Click here to enter text.			

1

Description	Quantity	Price	Total
Click here to enter text.	0		
Click here to enter text.			

2



3

Description	Quantity	Price	Total
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
Click here to enter text.	0		
		Total (exc GST)	
		GST	
		Invoice Total (inc GST)	



4

Description	Quantity	Price	Total
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
Click here to enter text.	0	\$0.00	
		Total (exc GST)	
		GST	
		Invoice Total (inc GST)	

5

## For Your Reference...

To **add numeric controls**:

1. Position the cursor where you want to insert the control
2. Click on **Plain Text** 
3. Click on **Design Mode**  and type in the new prompt text

## Handy to Know...

- You can type anything you like as the prompt text for a content control. For example, to ensure that a user enters their Surname in the required field, you might insert prompt text that says, **Please enter your last name**, or, **What is your last name?**

# INSERTING FORMULAS

Word allows you to insert **formula fields** into tables to perform calculations on the numbers entered by the user. This is useful for invoices and quotations, for example. Formula fields are

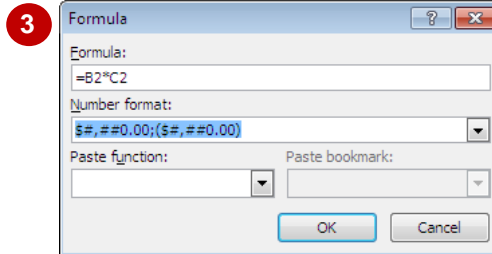
clever enough to convert the numbers in the text controls into values, and then add, subtract, multiply or divide as required. Here you will insert formulas to multiply the **Quantity** by the **Price**.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_5.docx...*

- 1 Click in the cell below **Total**, click on the **Insert** tab then click on **Quick Parts** and select **Field** to open the **Fields** dialog box
- 2 Click on the drop arrow for **Categories** and select **Equations and Formulas**, then click on **[Formula]** to display the **Formula** dialog box
- 3 Edit the formula as shown, then click on the drop arrow for **Number format** and select **##,##0.00 (\$#,##0.00)**
- 4 Click on **[OK]** to insert the field and then press **↓** to move down a cell
- 5 Repeat steps 1 to 4 for the remaining 7 line items, using the correct cell references, i.e. **=B3\*C3**
- 6 Repeat steps 1 to 4 for the following three cells, using the formula specified below and applying the **Number format** of **##,##0.00 (\$#,##0.00)**  
**Total=SUM(ABOVE)**  
**GST=B9\*10%**  
**Invoice Total =B9+B10**  
*We have displayed the field codes here so that you can check that the formulas and format are correct*



4

Quantity	Price	Total
0	\$0.00	\$ 0.00
0	\$0.00	
0	\$0.00	

5

Quantity	Price	Total
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
0	\$0.00	\$ 0.00
Total (exc GST)		
GST		
Invoice Total (inc GST)		

6

Quantity	Price	Total
0	\$0.00	{=B2*C2 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B3*C3 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B4*C4 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B5*C5 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B6*C6 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B7*C7 \# "\$#,##0.00;(\$#,##0.00)" }
0	\$0.00	{=B8*C8 \# "\$#,##0.00;(\$#,##0.00)" }
Total (exc GST)		{=SUM(ABOVE) \# "\$#,##0.00;(\$#,##0.00)" }
GST		{=B9*10% \# "\$#,##0.00;(\$#,##0.00)" }
Invoice Total (inc GST)		{=B9+B10 \# "\$#,##0.00;(\$#,##0.00)" }

## For Your Reference...

To **insert formulas**:

1. Position the cursor where you want to insert the formula, then click on **Quick Parts** on the **Insert** tab and select **Field**
2. Click on **[Formula]**
3. Type the formula then click on **[OK]**

## Handy to Know...

- You could also copy the formula field that contains the required format, paste into the new cell, press **Alt + F9** to display the field codes and then update the cell references this way. Press **Alt + F9** when finished to hide the field codes.

# INSERTING A COMBO BOX CONTROL






A **Combo Box** is a combination of a text box and a drop-down list of options that users can select from. It is ideal for fields that have a limited number of choices and where you want the user

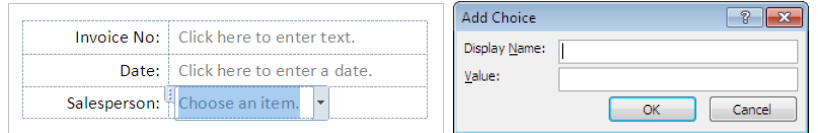
to be able to type in an option if the one they want doesn't appear in the list. Options are added to the **Combo Box** when it is created using the **Properties** dialog box.

## Try This Yourself:

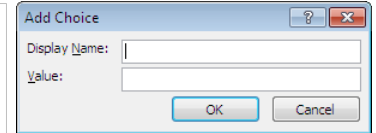
Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_6.docx...*

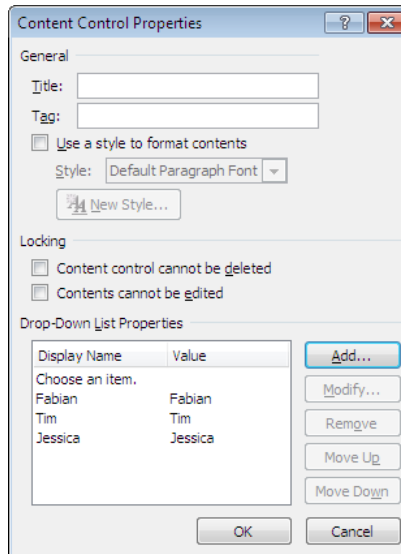
- 1 Click in the cell next to **Salesperson**
- 2 Click on the **Developer** tab then click on **Combo Box**  to insert a **Combo Box** content control
- 3 Click on **Properties**  to open the **Content Control Properties** dialog box
- 4 Click on **[Add]** to open the **Add Choice** dialog box
- 5 Type **Fabian** and then click on **[OK]**
- 6 Repeat steps 4 and 5 to add **Tim** and **Jessica**
- 7 Click on **[OK]** to save the changes, then click on the drop arrow  for the combo box to view the options  
*You will now insert the prompt text for the user...*
- 8 Click on **Design Mode**  and type **Type your name or select a name from the list**
- 9 Click on **Design Mode**  to exit design mode, click outside the box, then save the document



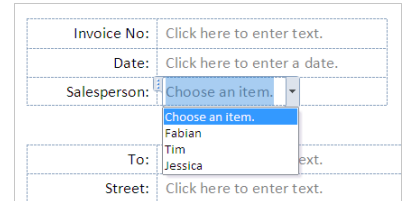
2



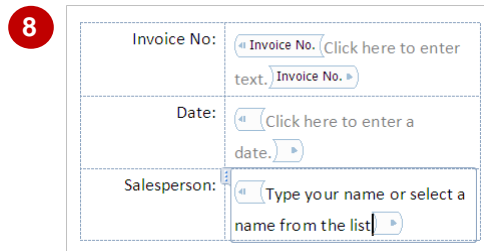
4



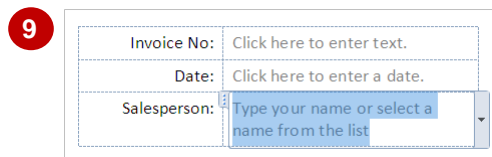
6



7





8




9

## For Your Reference...

To **insert** a **Combo Box** control:

1. Position the cursor where you want to insert a **Combo Box** control
2. Click on **Combo Box** 
3. Click on **Properties**  and click on **[Add]** to add the list entries, then click on **[OK]**

## Handy to Know...

- If you don't want **Choose an item.** to appear in the list of options, click on **Properties** , click on **Choose an item** under **Drop-Down List Properties** and click on **[Remove]**. Click on **[OK]**.

# INSERTING A DROP-DOWN LIST CONTROL






A **Drop-Down List** presents a list of options that the user can select from. It is ideal for fields that have a limited number of choices and where you want to force the user to select an option rather

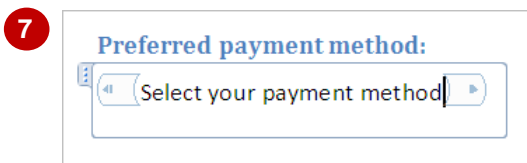
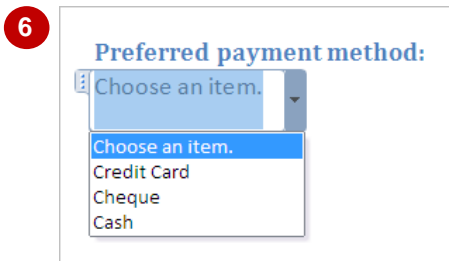
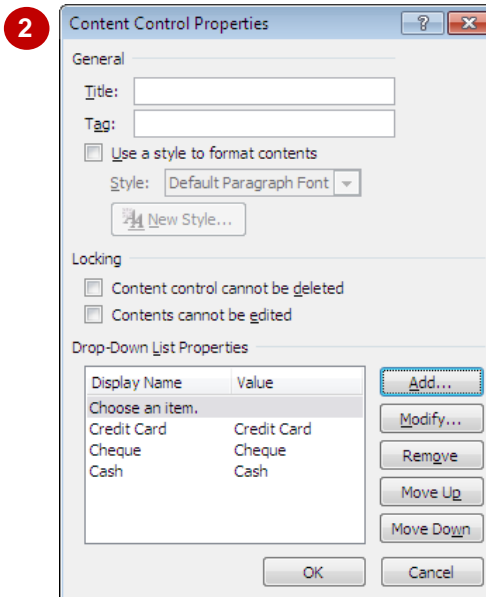
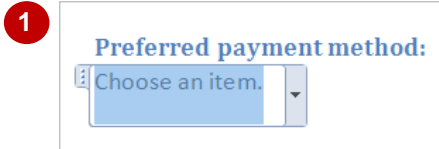
than typing in their own. Unlike a **Combo Box**, they do not include an editable text box. You can add options to the **Drop-Down List** in the **Content Control Properties** dialog box.

## Try This Yourself:

Same File



Continue using the previous file with this exercise, or open the file *W880 Forms\_7.docx...*

- 1 Click on the line below **Preferred payment method**, then ensure the **Developer** tab is active, then click on **Drop-Down List**  in the **Controls** group to insert this control
- 2 Click on **Properties**  to display the **Content Control Properties** dialog box
- 3 Click on **[Add]** and type **Credit Card**
- 4 Click on **[OK]** to add the item to the list
- 5 Repeat steps 4 and 5 to add **Cheque** and **Cash**
- 6 Click on **[OK]** to close the **Properties** dialog box, then click on the drop arrow  of the drop-down list to see the options  
*You will now insert the prompt text for the user...*
- 7 Click on **Design Mode** , scroll down to view the control and type **Select your payment method**
- 8 Click on **Design Mode**  to exit design mode, click outside the box, then save the document




## For Your Reference...

To **insert** a **Drop-Down List control**:

1. Position the cursor where you want to insert the **Drop-Down List** control
2. Click on **Drop-Down List** 
3. Click on **Properties**  and click on **[Add]** to add the list entries, then click on **[OK]**

## Handy to Know...

- A **Check Box control** could also be used in this exercise, where users select an option by clicking on the relevant check box. To insert a **Check Box control**, position the cursor, then click on **Check Box** . Click on **Properties** to change the **symbol** if desired, then click on **[OK]**.

# PROTECTING AND SAVING THE FORM

Once you have created a form, you really should **protect** the form and then save it as a **template**. The document is protected to ensure that the user cannot alter the form in any way while they

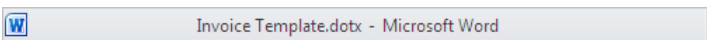
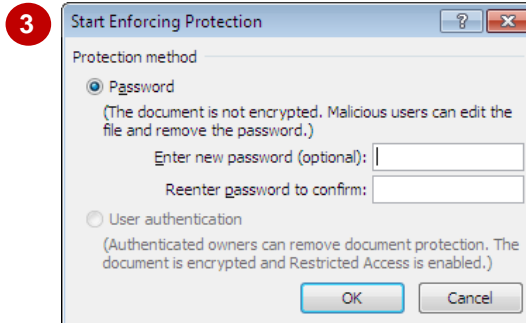
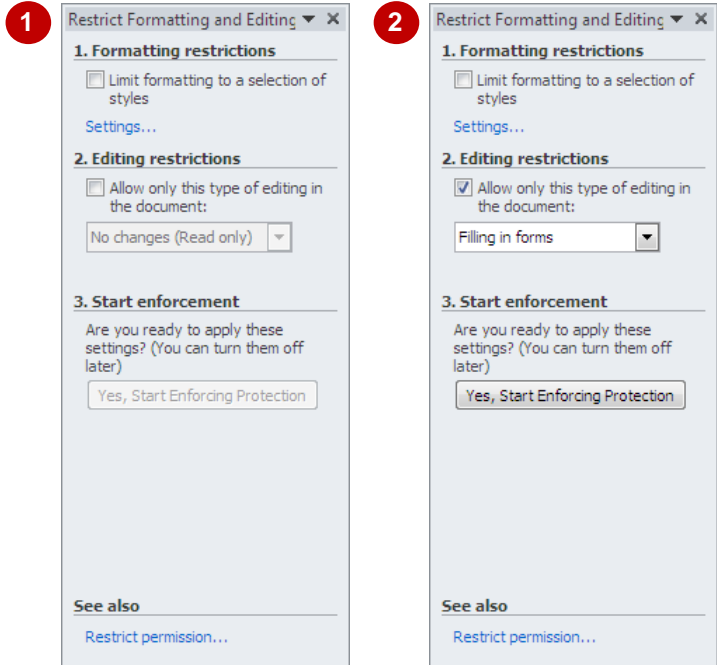
are completing it. Once the form is protected the user only has access to the content controls. The form is saved as a **template** so that it can be used for creating new documents.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Forms\_8.docx...*

- 1 Click on the **Developer** tab, then click on **Restrict Editing** in the **Protect** group and select **Restrict Formatting and Editing** to display the **Restrict Formatting and Editing** task pane
- 2 Click on **Allow only this type of editing in the document** so that it appears with a tick, then click on the drop arrow and select **Filling in forms**
- 3 Click on **[Yes, Start Enforcing Protection]**  
A dialog box will prompt you to enter a password...
- 4 Type **form** and press **[Tab]** then type **form** again
- 5 Click on **[OK]** to apply the password  
All data will now be locked, or protected, and users can only access the content controls...
- 6 Click on the **File** tab, then click on **Save As** to open the **Save As** dialog box, type **Invoice Template** in **File name**, then click on the drop arrow for **Save as Type** and select **Word Template (\*.dotx)**, then click on **[Save]**



6

## For Your Reference...

To **protect** a **document**:

1. Click on **Protect Document**
2. Click on **Restrict Formatting and Editing**
3. Click on the checkbox for **Allow only this type of editing in the document**

## For Your Reference (cont.)...

4. Click on the drop arrow and select **Filling in forms**
5. Click on **[Yes, Start Enforcing Protection]**
6. Type a password, press **[Tab]**, retype the password and click on **[OK]**
7. Save the document as a template

# COMPLETING AN ELECTRONIC FORM


You can use an electronic form in the same way that you use any other template in Word; by opening a new document based on that template. Since the document is protected, the user can

only move between controls, using **Tab** to go forwards and **Shift + Tab** to go back, and cannot edit any other part of the form in any way.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Invoice\_1.dotx...*

- 1 Examine the document  
*The first control, Invoice No, is selected ready for entry...*
- 2 Type **334578** and press **Tab** to move to the next control
- 3 Click on the drop arrow  for the **Date** and click on **[Today]** then press **Tab**
- 4 Type your name in **Salesperson** then press **Tab**
- 5 Complete the rest of the form as shown  
*You will need to type the dollar signs for Price and enter a space for each field that isn't used so that the prompt will be removed...*
- 6 Press **Ctrl + P** to print preview the form, then press **Enter** to print the form  
*The formula fields will be recalculated and updated before printing...*
- 7 Save the form as **Inv334578.docx** in the course files folder, then close the document

5

### Tax Invoice

Invoice No:	334578
Date:	26/08/2010
Salesperson:	Natalie

To:	Mary James Educators		
Street:	120 South Western Highway		
Suburb:	Sydney	Postcode:	2000

Description	Quantity	Price	Total
Hire of Training Facility	2	600	\$ 0.00
Training Facilitator	2	550	\$ 0.00
Courseware	30	29.95	\$ 0.00
Click here to enter text.	0	\$0.00	\$ 0.00
Click here to enter text.	0	\$0.00	\$ 0.00
Click here to enter text.	0	\$0.00	\$ 0.00
Click here to enter text.	0	\$0.00	\$ 0.00
Total (exc GST)			\$ 0.00
GST			\$ 0.00
Invoice Total (inc GST)			\$ 0.00

Preferred payment method:

Cash 

6

### Tax Invoice

Invoice No:	334578
Date:	26/08/2010
Salesperson:	Natalie

To:	Mary James Educators		
Street:	120 South Western Highway		
Suburb:	Sydney	Postcode:	2000

Description	Quantity	Price	Total
Hire of Training Facility	2	600	\$1,200.00
Training Facilitator	2	550	\$1,100.00
Courseware	30	29.95	\$ 898.50
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
Total (exc GST)			\$3,198.50
GST			\$ 319.85
Invoice Total (inc GST)			\$3,518.35

Preferred payment method:

Cash 

## For Your Reference...

To **complete** an **electronic form**:

1. Press **Tab** or **Shift + Tab** to move between controls
2. Type data into the controls or select from lists as required
3. Recalculate the fields and print the form

## Handy to Know...

- You can ensure that all of the fields are recalculated at the time that the document is printed by selecting **Update fields before printing** in the **Display** page of **Word Options**.
- You can update individual fields by right-clicking on them and selecting **Update Field**.



# EDITING A PROTECTED FORM

After creating the form, saving it as a template and protecting it from unintentional changes, you can always edit it at a later date. For example, you may want to change the text formatting of the

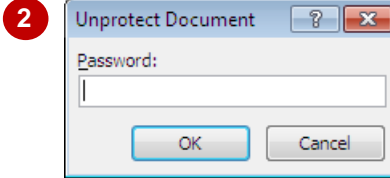
content labels or edit a content control's properties, such as setting the control to disappear once used. To make any changes, you simply open the template, unlock it and then make the changes.

## Try This Yourself:

**Open File**

Before starting this exercise you **MUST** open the file *W880 Invoice\_1.dotx...*

- 1 If the **Restrict Formatting and Editing** task pane is not displayed, click on the **Developer** tab, then click on **Restrict Editing** and select **Restrict Formatting and Editing**
- 2 Click on **[Stop Protection]** at the bottom of the task pane  
*You will be prompted to enter the password...*
- 3 Type **form** then click on **[OK]** to access the editable form
- 4 Click on **Design Mode** in the **Developer** tab so that you can edit the prompt text, then add two spaces to the prompts for the **Price** so that they match the format of the formula fields, as shown
- 5 Click on **Design Mode** again to turn off design mode
- 6 Click on **[Yes, Start Enforcing Protection]**
- 7 Type **form** for the password, then press **[Tab]** and type **form** again and click on **[OK]**
- 8 Save and close the form template



2

Description	Quantity	Price	Total
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Total (exc GST)			\$ 0.00
GST			\$ 0.00
Invoice Total (inc GST)			\$ 0.00

4

Description	Quantity	Price	Total
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Click here to enter text.	0	\$ 0.00	\$ 0.00
Total (exc GST)			\$ 0.00
GST			\$ 0.00
Invoice Total (inc GST)			\$ 0.00

5

## For Your Reference...

To **edit** a **form**:

1. Click on **Protect Document** and select **Restrict Formatting and Editing** and click on **[Stop Protection]**
2. Type the password, click on **[OK]**, make the required changes, then click on **[Yes, Start Enforcing Protection]**

## Handy to Know...

- You can apply **styles** to data in the content controls. To do this, click in the control to activate it, then click on **Properties** in the **Controls** group. Click on **Use a style to format contents** so that it appears with a tick, then click on the drop arrow for **Style** and select a style. Click on **[OK]**.

# DELETING A CONTENT CONTROL

In addition to editing content controls and changing their properties, you can also delete them when they are no longer required or if you decide to replace them with another type of

content control. Again, you need to open the template, remove the protection, make the change, then enforce the protection again.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W880 Invoice\_2.dotx...*

**1** If the **Restrict Formatting and Editing** task pane is not displayed, click on the **Developer** tab, then click on **Restrict Editing** and select **Restrict Formatting and Editing**

**2** Click on **[Stop Protection]** in the task pane, then type **form** and click on **[OK]**

**3** Click to the left of the **Salesperson** row of the table to select it

**4** Click on the **Layout** tab, then click on **Delete** and select **Delete Rows**

*The entire row and control will be deleted...*

**5** Scroll down then click on the content control for **Preferred payment method**

**6** Click on the tab on the control to select it

*The selection colour will become darker to show that it is selected...*

**7** Press **[Del]** to delete it

**8** Protect the form, then save and close the template

**3**

Invoice No:	Click here to enter text.
Date:	Click here to enter a date.
Salesperson:	Type your name or select a name from the list

**4**

Invoice No:	Click here to enter text.
Date:	Click here to enter a date.

**5**

Preferred payment method:

Select your payment method

**6**

Preferred payment method:

Select your payment method

**7**

Preferred payment method:

## For Your Reference...

To **delete** a **content control**:

1. Click on the content control
2. Click on the tab of the control to select it
3. Press **[Del]**

## Handy to Know...

- If a content control appears in a row of a table, a quick way to remove it is to select and then delete the entire row.
- To delete a content control, right-click on the control and select **Remove Content Control**.