

## Creating a New Form

When you create a form, you usually start by creating a template that contains the text on the form that doesn't change, that contains formatting, and that contains a table to line everything up neatly. By using a template as the basis for a form, users can fill out the form without changing the text or formatting of the form itself. Think of the template as a blank form when putting it together.

Some of the tools you use when creating a form include:

**Templates:** Forms are normally saved as templates so that they can be used again and again.

**Content controls:** Content controls are the areas where users input information in a form. We'll learn more about content controls in upcoming lessons.

**Tables:** Tables are often used in forms to align text and form fields, and to create borders and boxes.

**Protection:** Forms are protected so that users can complete the form without changing the text and/or design of the form itself.

Once the form document looks the way you want it to, you are ready to insert form controls.

### Display the Developer tab on the Ribbon

The Developer tab must be displayed on the Ribbon in order to access and insert the form controls.

- Click the **File** tab on the Ribbon and select **Options**.  
The Word Options dialog box appears.
- Click the **Customize Ribbon** tab.  
A list of tabs appears on the right side of the Customize Ribbon tab.
- Select the **Developer** check box under Customize the Ribbon and click **OK**.  
The Word Options dialog box closes and the Developer tab is displayed on the Ribbon.

▪ **Exercise**

- Exercise File:** Form15-1.docx
- Exercise:** Open the Developer tab on the Ribbon.

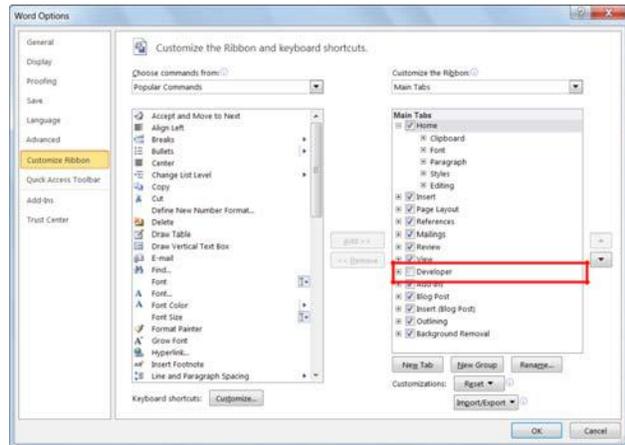


Figure 14-1: Add the Developer tab to the Ribbon from the Word Options dialog box.



Figure 14-2: The Developer tab of the Ribbon.

## Adding Content Controls

Once you have created the form document, you can start inserting the content controls the user needs to fill out.

### Tips

- If content controls are not available, you may have opened a document created in an earlier version of Word. To use content controls, you must convert the document to Word 2010 format.
- Place your insertion point where you want to insert a form content control.
- Click the **Developer** tab on the Ribbon.  
The Controls group is where the content controls you can insert in the form are located.
- Click the content control you want to use in the Controls group on the Ribbon.  
Table 14-1: Form Content Controls describes each of the content controls you can insert in the form.

### Group content controls

You can group content controls to make them easier to work with.

- Select the controls you want to group.
- Click the **Group** button in the Controls group.
- Select **Group** from the list.

### Set content control properties

You can change the properties for a content control after it is inserted. Do this to change the options available under a drop-down list, for example.

- Select the content control you want to change and click **Properties** in the Controls group.  
The Properties dialog box appears.
- Change the content control's properties as necessary.
- Click **OK**.

### Exercise

- **Exercise File:** Form14-2.docx
- **Exercise:** Insert content controls in the form. (Replace the text in the right column of the table with the correct content control, as indicated in the image below.)

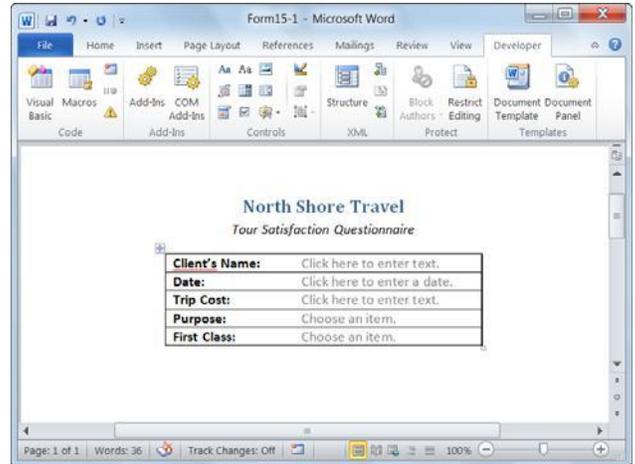


Figure 14-3: The form with content controls filled in.

Table 14-1: Form Content Controls

	<b>Rich Text</b>	Formatting can be saved by loading, saving, or closing the document. Use this control for a short paragraph.
	<b>Text</b>	This is limited to a plain text paragraph, so no formatting can be included.
	<b>Picture Content Control</b>	Fills the content control with a single picture.
	<b>Building Block Gallery</b>	Shows a gallery of formatted design choices you can add to the content control. Specify the building blocks you want to make available from the Quick Parts gallery.
	<b>Combo Box</b>	Contains a list that you can edit directly. Formatting can be saved by saving or closing the document.
	<b>Drop-Down List</b>	Choose from several predetermined selections that appear upon clicking the list arrow.
	<b>Date Picker</b>	Use this to help users enter a date. The content control allows you to control the format and appearance of the date.
	<b>Check Box</b>	Insert a check box into a form.
	<b>Legacy Tools</b>	If you prefer the form controls from previous versions of Word, they are available here.

## Assigning Help to Form Content Controls

Help out the people who fill out the forms you create by adding instructional text to the content controls. Instructional text already appears when the content controls are inserted, such as “Choose an item,” or “Click here to enter text.”

You can enter instructional text that is more specific to your form, such as “Click here to enter your first name.”

- Click the **Developer** tab on the Ribbon and click the **Design Mode** button in the Controls group. The form content controls change so that they are editable.
- Click the content control that you want to add instructional text to.
- Edit and format the placeholder text as you wish. Once you’re done editing the placeholder text for content controls, turn off Design Mode.
- Click the **Design Mode** button in the Controls group. The content controls are edited with instructional text.

### Make a content control disappear

You can make a content control disappear when someone enters their own content in a Rich Text control or Text control.

- Click the **Developer** tab on the Ribbon and click the **Design Mode** button in the Controls group. The form content controls become editable.
- Click the **Rich Text** or **Text** content control.
- Click the **Control Properties** button in the Controls group. The Content Control Properties dialog box for the control appears.
- Click the **Remove content control when contents are edited** check box.
- Click **OK**.
- Click the **Design Mode** button in the Controls group.

#### Exercise

- Exercise File:** Form14-3.docx
- Exercise:** Change the placeholder text in the Client’s Name control to, “Enter your name: Last, First”

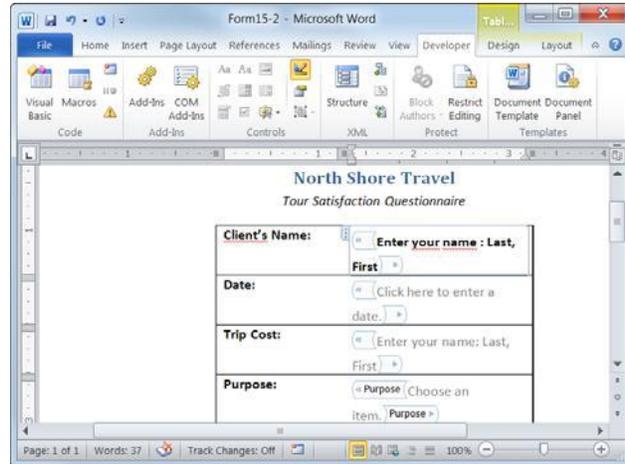
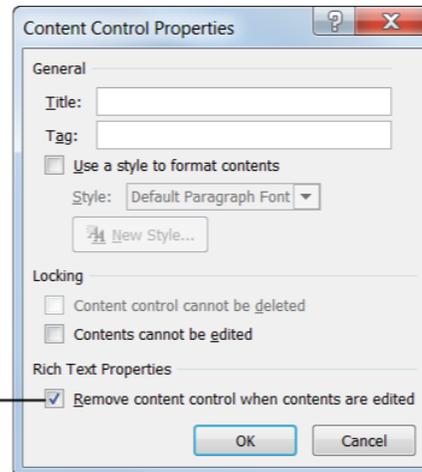


Figure 14-4: Design Mode allows you to change the instructional (placeholder) text of content controls.



Select this check box to make the content control disappear when it is edited.

Figure 14-5: The Content Control Properties dialog box for a Rich Text content control.

## Preparing the Form for Distribution

You need to protect a form before distributing it so that the content controls cannot be removed or edited when users fill out the form.

### Protect the entire form

If you are asking people to fill out a form, in most cases you will want people to fill out the entire form.

- Open the form.  
Make sure the form and its content controls appear the way you want users to see it before filling out the form.
- Click the **Developer** tab on the Ribbon and click the **Restrict Editing** button in the Protect group.  
The Restrict Formatting and Editing task pane appears.
- Click the **Allow only this type of editing in the document** check box in the Restrict Formatting and Editing task pane.  
Specify the type of editing to be allowed in the editing restrictions list.
- Click the **Editing restrictions** list arrow and select **Filling in forms** from the list.  
If that is all the protection you need, you are ready to start protecting the document.
- Click the **Yes, Start Enforcing Protection** button.  
The Start Enforcing Protection dialog box appears. It's a good idea to enter a password so that users can't change the editing restrictions.
- Click the **Enter new password (optional)** text box and enter a password.
- Click the **Reenter password to confirm** text box and enter the password again.
- Click **OK**.  
The document is protected, and the protection level is shown in the Restrict Formatting and Editing task pane.

### Exercise

- Exercise File:** Form14-4.docx
- Exercise:** Protect the form so it is ready to be distributed.

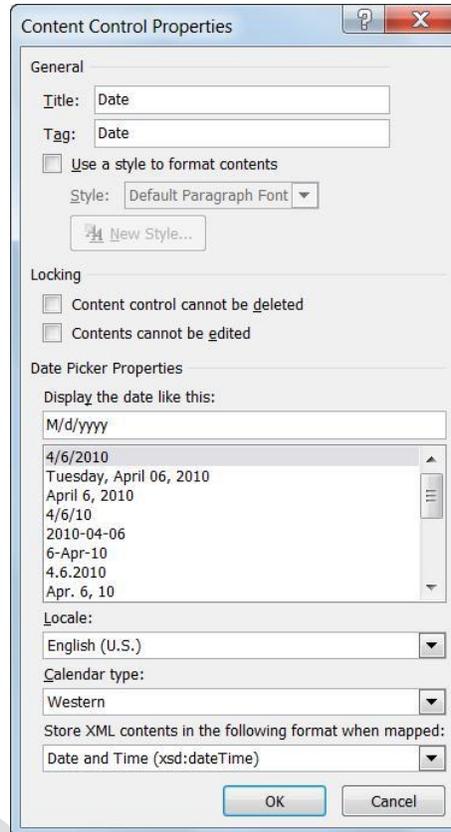


Figure 14-6: Protecting the form for distribution.

## Protect parts of the form

Protect only parts of the form if you want people to be able to edit the document beyond the form content controls.

- Open the form.  
Make sure the form and its content controls appear the way you want users to see it before filling out the form.
- Select the content control or the content control group you want to protect.  
If content controls are grouped, you can change their protection properties all together.
- Click the **Developer** tab on the Ribbon and click the **Properties** button in the Controls group.  
There are two locking options you can use to protect a content control:  
**Content control cannot be deleted:** This allows editing of the content control, however it cannot be deleted.  
**Contents cannot be edited:** This allows deleting on the content control, but it cannot be edited.
- Select one or both of the locking options in the dialog box and click **OK**.  
The form is protected accordingly.



**Figure 14-7:** The Content Control Properties dialog box.

## Filling Out a Form

Fill out a form once you've completed creating it to make sure it's working correctly.

Also, if you receive a form from someone, here's how to fill it out.

- Click a **content control** to begin working with it.

Content controls should have some instructive text on or near them to help you understand how to fill out the content control.

- Select an option from the content control or enter text as directed.

The document around the content controls should also be able to help you with controlling these options.

- Save the form when you are finished filling it out.

Your changes to the form are saved and ready to be tabulated.

### Exercise

- **Exercise File:** Form14-5.docx
- **Exercise:** Fill out the form using your own information, or the information shown in the image below.

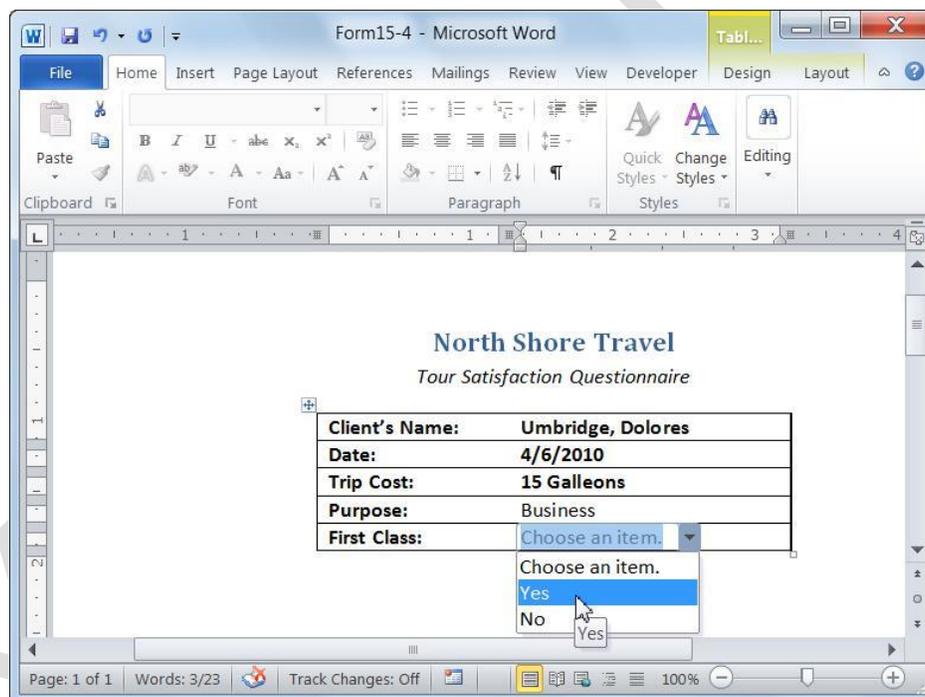


Figure 14-8: Choose an option from the combo box to proceed.

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## Customizing Word

### Customizing the Ribbon

One of the most useful features in Office 2010 is that you can customize the Ribbon. Add your own tabs and groups, or rearrange the Ribbon to better fit your work style.

#### Create a new tab or group

You can add new groups to tabs, or you can create new tabs with new groups.

- Click the **File** tab on the Ribbon and select **Options**.

The Options dialog box appears.

- Click the **Customize Ribbon** tab.

The left column displays commands that you can add to the Ribbon.

The right column displays the tabs on the Ribbon, and the groups and commands in each tab.

**Tip:** Click the plus sign next to a tab or group to expand it.

- In the right column, select the tab where you wish to add the new tab or group.

A new tab, which automatically includes a new group, will be inserted below the selected tab.

A new group will be inserted within the selected tab.

- Click the **New Tab** or the **New Group** button. The new tab or group is added.

#### Rename a tab or group

Once you've created a tab or group, give it a name.

- Select the tab or group you want to rename.

- Click the **Rename** button.

The Rename dialog box appears.

- Enter a name for the selected tab or group in the **Display Name** text box.

The tab or group is renamed. For a group, also select a symbol to represent the group.

- Click **OK**.

The tab or group is renamed.

#### Exercise

- Exercise File:** None required.
- Exercise:** Create a new group on the Home tab called "Printing" and include the command to Print Preview and Print.  
Restore the Ribbon defaults.

Click to reorder the selected tab or group.

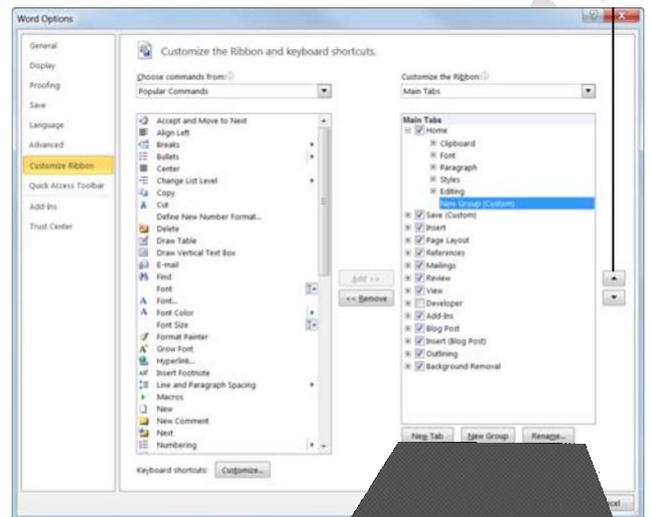


Figure 15-1: Use the buttons in the Options dialog box to add a new tab or group to the Ribbon.

Click to create a new tab.

Click to create a new group.

Click to rename the selected tab or group.

Click to view another group of commands.

Click to add the command on the left to the selected group on the right.

Click to view all the tabs on the Ribbon.

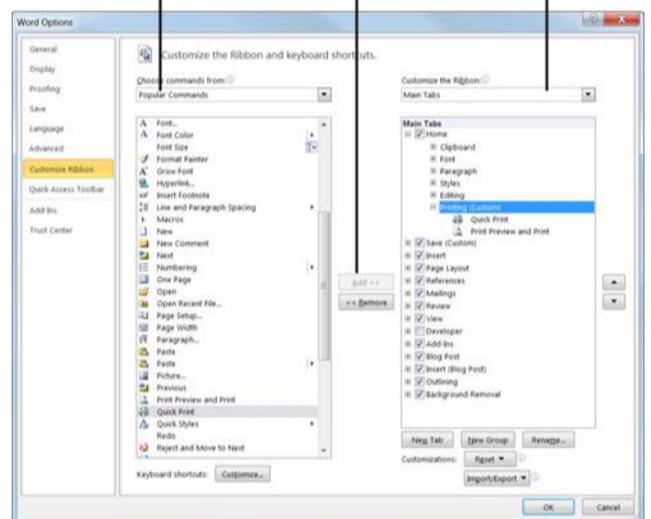


Figure 15-2: Adding commands to groups on the Ribbon.

## Customizing Word

### Add a command to a group

Once you have created a new tab or group, you can add commands to the group. You can also add commands to groups that already appear on the Ribbon.

- In the right column, select the group to which you want to add a command.

This could be a group you've created from scratch, or even a group that appears by default.

- In the left column, select the command you want to add to the Ribbon. Click the **Add** button.

The command is added to the group.

- Tip:** Not finding the command you want to add? Click the **Choose commands from** list arrow and select the group of commands you want to view.

### Restore the default Ribbon

If you no longer want to use the customizations you've added to the Ribbon, you can restore the Ribbon to its original, default settings.

- Click the **Reset** button.

Two options appear:

**Reset only selected Ribbon tab:** Restores the default settings for the selected tab.

**Reset all customization:** Removes all Ribbon and Quick Access Toolbar customizations, restoring them to the default arrangement and appearance.

- Select the reset option you wish to use.

The Ribbon is restored to its default settings.

### Remove a tab or group

You can also remove a specific tab or group from the Ribbon.

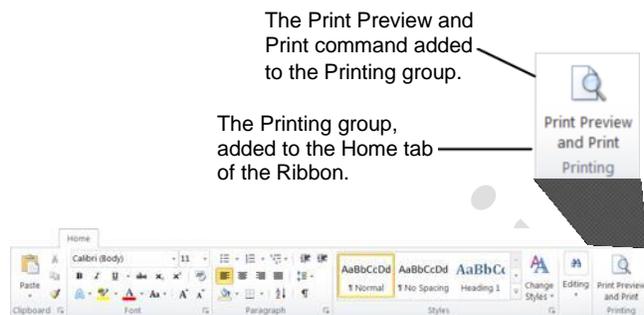
- In the right column, right-click the tab or group you wish to use.

- Select **Remove** from the contextual menu.

The tab or group is removed from the Ribbon.

#### Tips

- Any changes you make to a program's Ribbon will appear only in that program.
- To hide a tab on the Ribbon, deselect its check box.



**Figure 15-3:** The Home tab of the Ribbon, customized with a new group.

Customizing Word

## Customizing the Quick Access Toolbar

The Quick Access Toolbar is a shortcut for commands that are used often. If the Quick Access Toolbar doesn't contain enough of your frequently used commands, you can customize it by adding or deleting commands.

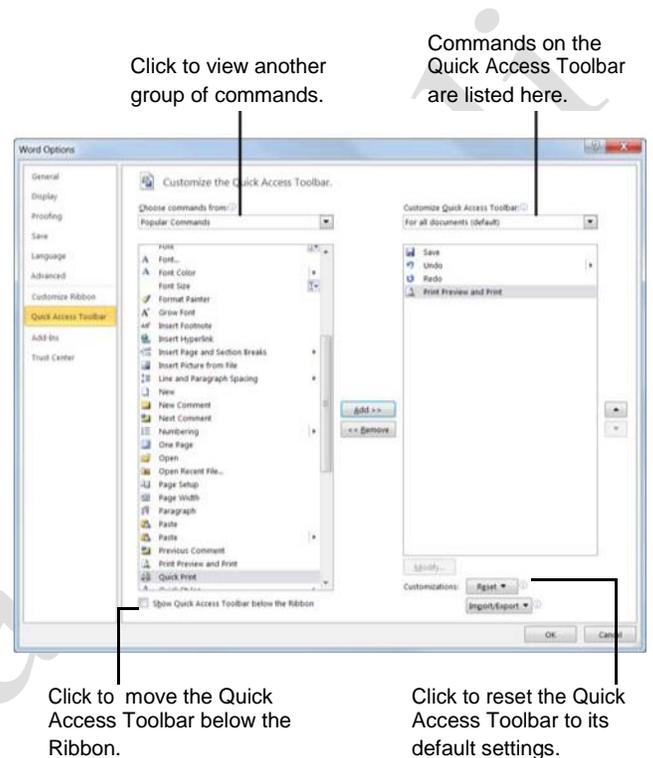
- ❑ Click the **File** tab and select **Options**.  
The Word Options dialog box appears.
- ❑ Click the **Quick Access Toolbar** tab.  
This tab displays options for customizing the Quick Access Toolbar.  
The left column displays commands you can add to the Quick Access Toolbar. The right column displays commands that appear there.
- ❑ In the left column, select the command you want to add to the Quick Access Toolbar.
- ❑ Click the **Add** button.  
The command is added to the Quick Access Toolbar.

**✓ Tips**

- Arrange the order in which the commands are displayed by clicking the **Move Up** and **Move Down** buttons to the right of the column.
- Click the **Reset** button and select **Reset only Quick Access Toolbar** to return the Quick Access Toolbar to its default commands.
- Select a command in the Quick Access Toolbar column and click the **Remove** button to remove it from the Quick Access Toolbar.

▪ **Exercise**

- ❑ **Exercise File:** None required.
- ❑ **Exercise:** Add the Print Preview command from the Popular Commands group to the Quick Access Toolbar. Move the Quick Access Toolbar below the Ribbon.



**Figure 15-4:** Adding a command to the Quick Access Toolbar.

## Customizing Word

# Using and Customizing AutoCorrect

AutoCorrect automatically corrects many common typing and spelling errors as you type. It is also a great way to use shorthand for longer words, phrases, or symbols.

AutoCorrect is a feature that is shared across the Microsoft Office suite—so any additions or changes you make to AutoCorrect in one program, such as Word, will appear in all Microsoft Office programs, like Excel, PowerPoint, and Outlook.

## How AutoCorrect works

You may have already noticed that sometimes your typos are corrected as you enter text in Word. When you type an AutoCorrect entry and then press the <Spacebar>, AutoCorrect replaces that text with the correct text.

For example, AutoCorrect will change the mistyped words “hte” to “the”, or “adn” to “and”. AutoCorrect also corrects simple grammar mistakes, such as capitalization problems. For example, it would change “GOing” to “Going,” or capitalize the first letter in sentences.

## Create an AutoCorrect entry

Word already has many entries in AutoCorrect, but you can add your own entries to correct habitual misspellings, quickly insert a symbol, or insert a shorthand version of a long phrase that you frequently use.

- Click the **File** tab and select **Options**.  
The Word Options dialog box appears.
- Click the **Proofing** tab.  
This tab displays options for how Word corrects and formats text.
- Click the **AutoCorrect Options** button.  
The AutoCorrect dialog box appears with the AutoCorrect tab in front.
- Type the word or phrase you want to correct or use as shorthand in the **Replace** text box.  
This is the text that AutoCorrect will recognize when you type.
- Type the word or phrase you want to appear in the **With** text box.  
When the text in the “Replace” text box is typed with a space, the text in the “With” text box will appear.

### Exercise

- Exercise File:** None required.
- Exercise:** Create an AutoCorrect entry that replaces “ot” with “to”.

Try the AutoCorrect entry with this phrase, “He was going ot the store.”

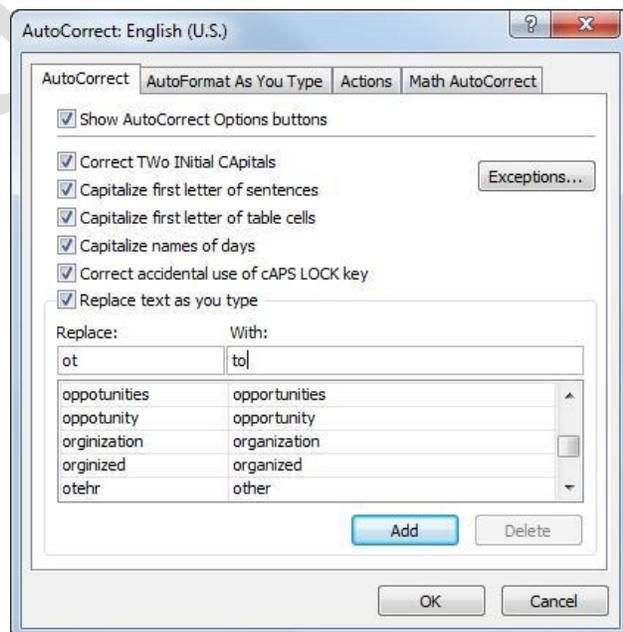
He was going ot



Press <Spacebar>

He was going to

**Figure 15-5:** An example of how AutoCorrect works.



**Figure 15-6:** The AutoCorrect tab of the AutoCorrect dialog box.

- Click **Add**.

The entry is added to the AutoCorrect list.

- Click **OK** to close the AutoCorrect dialog box.  
Click **OK** to close the Word Options dialog box.

The dialog boxes close and the entry will now be available in all Word documents, and also in all other Office applications.

Mustafa H. Ali

## Changing Word's Default Options

Microsoft spent a lot of time and research when it decided what the default settings for Word should be. However, you may find that the default settings don't always fit your own needs.

This lesson isn't so much an exercise as it is a reference on how to customize Word by changing its default settings.

- Click the **File** tab and select **Options**. The Word Options dialog box appears.
- Click the tabs on the left to view different option categories.  
See the table below, *Tabs in the Word Options Dialog Box*, for more information on these categories.
- Change the options as you see fit. Click **OK** to confirm the changes.  
The changes are applied to the Word program.

### Exercise

- **Exercise File:** None required.
- **Exercise:** Explore the tabs in the Word Options dialog box.

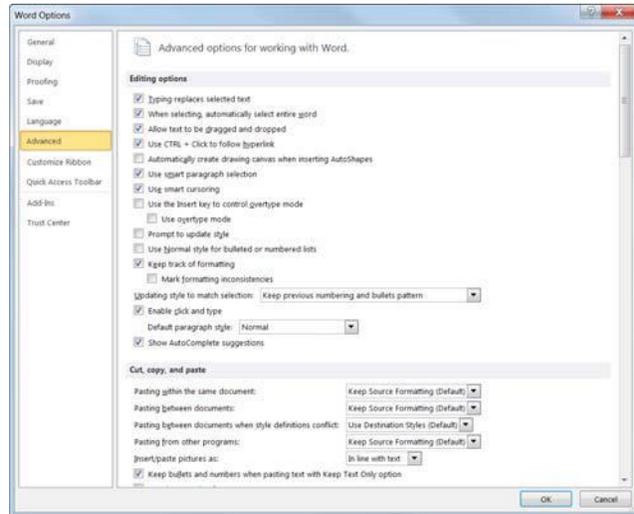


Figure 15-7: The Advanced tab of the Word Options dialog box.

Table 15-1: Tabs in the Word Options Dialog Box

<b>General</b>	Change the most commonly modified options in Word. This includes enabling the Mini Toolbar and Live Preview. Also, change the color scheme, control ScreenTips, and change the user name.
<b>Display</b>	Change how content is displayed on the screen and when printed. Change screen display options such as showing white space between pages in Print Layout view and choose which formatting marks you always want to display on the screen, such as tab characters and paragraphs. Set printing options, such as updating fields before printing and printing hidden text.
<b>Proofing</b>	Change how Word corrects and formats your text. Change the types of errors that Word flags when looking for spelling and grammar errors.
<b>Save</b>	Customize how documents are saved, such as how often Auto Recover saves a document, and change default file locations.
<b>Language</b>	Add additional languages to edit your documents. Also set the language priority order for added languages.
<b>Advanced</b>	Advanced options for working with Word. Change how Word works when you edit text; modify how cut, copy, and paste commands operate; customize tools in the window, such as how it displays screen tips and scroll bars; control how the document is printed; and choose advanced save options.
<b>Customize Ribbon</b>	Create custom tabs and groups for the Ribbon.
<b>Quick Access Toolbar</b>	Add commands to the Quick Access Toolbar.
<b>Add-Ins</b>	View and manage Microsoft Office add-ins, such as Acrobat PDFMaker and custom XML data.
<b>Trust Center</b>	Help keep your document safe and your computer secure and healthy. Read privacy statements and change Trust Center Settings to control how Word works with macros, add-ins, the message bar, trusted publishers and locations, and more.