M.E.O.C. Tech Worksheets

How to create a fill-able form from an original in Word 2007

1. Open the original form in Microsoft Word.
2. Delete any lines that were inserted for filling in a Name, Date, etc. and leave the cursor one space to the right of the text or the colon.
3. If the, "Developer" TAB is not showing on your Toolbar, click the Office Button in the upper-left corner, take, "Word Options" at the bottom, "Popular" from the left panel menu, and put a checkmark next to, "Show Development tab…". Click OK.
4. Click on the Development TAB. In the "Controls" section, click "Legacy Tools", (bottom right, when you hover your cursor over the icons, the name will appear) and then, "Text Form Field", the first choice. A gray text box will appear at the cursor where the Name, etc. would be filled/typed in. (The box will expand as people you send this to type characters into it.) **SAVE** this document now with a different name from the original.
5. Go to the other blank lines such as Signature, etc. and do the same. (You may have to move the Name/Date/Signature, etc. text over to be spaced properly on the sheet since you deleted the blank lines from the original form.)
6. If you need a check box for Yes/No or Multiple Choice questions, place your cursor where you need the checkbox and, under the Development TAB, Controls Section, Legacy Tools, click the second choice, "Check Box Form Field" under Legacy Forms.
7. You have other choices under Legacy Forms you can experiment with to set up your fillable form such as Drop-down menu, Frame, or Shaded Text.
8. Now, in order for the fillable text boxes, check boxes, or other form fields you have inserted to be active in your form, you must protect the document. Again, under the Developer TAB, click, "Protect Document" then, "Restrict Formatting and Editing".
9. A panel will appear on the right with three sections. In Section 2, check the box, "Allow only this type of editing…", then in the drop-down menu, take, "Filling in Forms".
10. In Section 3, click the button, "Yes, start enforcing protection".
11. A dialog box will appear asking for a password. This will allow only those who know the password to edit this document but will allow those who receive it to fill in the form fields. Type a password, reenter it then click OK. (You will want to record this password so you won't forget it.)
12. Save your final document again and you are ready to send it out electronically to recipients.
13. To edit this form after you've protected it, click, "Protect Document" from the Developer TAB then click the "Stop Protection" button at the bottom. It will ask for your password, type it in, click OK and you're in to edit.
14. Be sure to Protect it again when editing is finished by re-doing steps 8-11.