Creating Survey Forms from a Word Table

1   Introduction

This document explains how to use *Microsoft Word for Windows 2000* tables to create a tabular layout for documents such as survey forms

On typewriters typists used *Tab stops* to line up columns of text or numbers. However, this is not recommended with wordprocessors. Tab settings can vary between computers, causing the lay out to vary. If you want to line up text, for example, when creating a survey form, then the easiest way is to create a table. By default, *Microsoft Word for Windows 2000* will put borders round the cells (boxes) in the table. However, you can easily remove the borders.
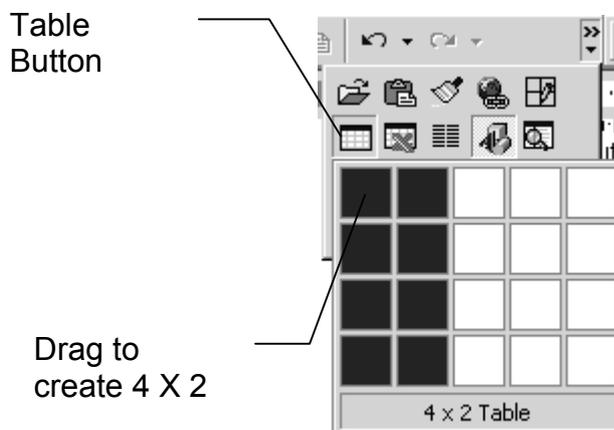
2   Creating a paper form

2.1   Create a table

Exercise 1 Create a table

- Open a new document and insert 3 or 4 blank lines. We will use them later.
- Use *Hover Help* to locate the **Insert Table** button on the *Standard Toolbar* (If you cannot see the button click on **>>**to see more buttons). Click on the button.

Figure 1 Insert a table

Table Button

Drag to create 4 X 2

4 x 2 Table

- When the table template drops down drag to create a **4 X 2** table.

- Type the data shown in Figure 2, using the TAB key to move between fields. Substitute your own title, name etc. as indicated

Figure 2 Enter Data in a Table

Title: (Ms/Mr/Mrs/Miss/Dr/Other)	Enter your title here
First Name(s)	Enter your first name here
Last Name(s)	Enter your last name here
School or Department	Enter your School or department here

You can quickly remove all borders and shading from a table by clicking the table, clicking **Table AutoFormat** (**Table** menu), and then clicking **None** in the **Formats** box.

2.2 Adding check boxes to your form

On a survey form you may wish to add boxes where people can place ticks.

Exercise 2 Create a table with check boxes

- Create the table shown in Figure 3.

Figure 3 Form with check boxes

Are You Doing	BA/BSc/LLB	☐
	Taught Postgraduate Course	☐
	Research Degree	☐
	Other (Please Specify)	
Are You Studying	Part Time	☐
	Full Time	☐

- You can insert check boxes using the **Forms** tool bar. If you cannot see the toolbar select **Tools** from the **View** menu then click on **Forms**. Click in the place where you want to insert the check box, then click the check box button. (see Figure 4). To locate a button on the toolbar hold the mouse over the buttons (do not click). The name of the button will drop down. This is called *hoverhelp*.

Figure 4 Forms Toolbar

- To insert a larger box such as the one labelled 'Other (Please Specify)' use the **Text Form Field** button on the **Forms** toolbar. To locate a button

on the toolbar hold the mouse over the buttons (do not click). The name of the button will drop down. This is called *hover help*..

- To put add a border select the cells that make up the box, and add a border using the **Outside Border** button on the toolbar.
- Save your document as **N:\My Documents\Survey.doc** and close your document

3   Creating a form to fill in with Word

The On-line help provides detailed instructions on how to create forms that you can fill in with Word. To find out more about creating forms select **Word Help** from the **Help** menu and type '**Create form'** in the **Answer Wizard** box.

3.1   Create a template

In the next exercise we will use the document that we created in the previous exercise as a template.

Exercise 3 Create a template

- Open your document **N:\My Documents\Survey.doc** .On the **File** menu, click **Save As**.
- In the **Save as type** box, select **Document Template** from the drop down menu.
- The default folder is the your template folder in the **Save in** box. On CCS student workstations this is **N:\msoffice**
- In the **File name** box, type a name for the new template, e.g. **myform** and then click **Save**.
- Make any changes that you want, for example, if you filled in your own name etc. remove these to leave a blank space.
- **Save** your template again & close it.

You can also create a new template. To do this, click **New** on the **File** menu, click on the template then click **Template** under **Create New**, and then click **OK**.
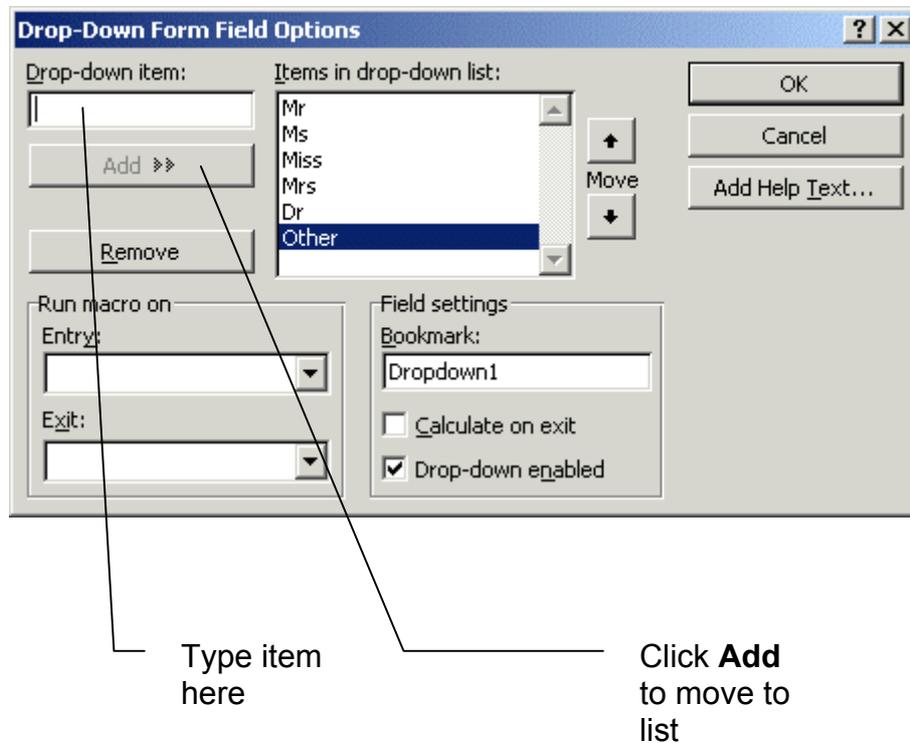
3.2   Add objects to a form

One way of ensuring that people only enter valid values is to limit the values to a set menu. On our paper form we asked people to enter their title (Ms/Mr/Mrs/Miss/Dr/Other) on the form. If they are completing the form using *Microsoft Word for Windows 2000* then they do not need to type in a value. You can put the valid values on a menu.

Exercise 4 Add a drop down menu to a form

- Delete the text **(Ms/Mr/Mrs/Miss/Dr/Other)** from the box labelled title.
- Press the TAB key to go to the next field in the table.
- Click on the **Drop Down Form Field** on the **Forms** toolbar. (Use *Hover Help* to locate it). A box will appear in the field

- Double click on the box. A box labelled **Drop Down Form Field Options** will appear (Figure 5)

Figure 5 Drop Down Form Fields Options

Type item here

Click **Add** to move to list

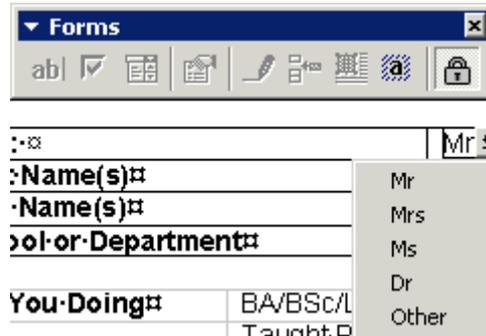- Enter the list of titles and click on **OK**

3.3   Entering data on a form

Before you make a form available to users, protect it by clicking **Protect Form** button on the **Forms** toolbar. Protection allows users to fill in the form but prevents them from changing the form's layout and its standard elements. When you want to go back to modifying the form click the **Protect Form** button again to unprotect the form.

Exercise 5 Entering data on the form

- Click on the **Protect Form** button.
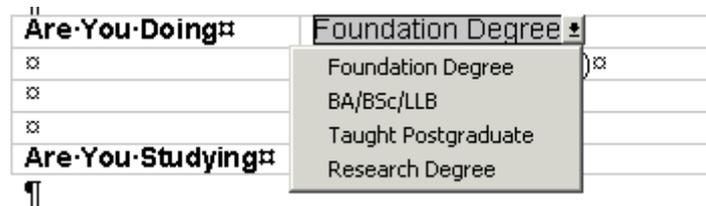- Click on the drop down box. Your menu will appear as shown in Figure 6.

Figure 6 Drop Down Menu

- Select a title. It will be entered in the form.

For additional practice you may wish to modify your form so that degree types are selected from a menu, as shown in Figure 7. For the box labelled **If 'Other' please specify** use the **Text Form Field** on the **Forms** toolbar. You will need to unprotect your form before you can modify it.

Figure 7 Form for Entering data with Word

When you have completed the form design you will need to protect it and save it as a *Microsoft Word for Windows 2000* document before you distribute it to people. You may also like to save it as a template for future use. To save a file as a different type choose **Save As** from the File menu and choose the appropriate file type from the **Save File As Type** box in the **Save As** dialogue box.