

HOW TO USE FORMS IN WORD

Form fields do not work unless the document is “protected” as a “form”.

Before typing anything into your form check to see that it has been “protected.” Click on “Tools” on the menu bar. From there, check to see if the list shows “Protect” or “Unprotect.” If it shows “Protect” then click on it. A menu will appear asking for a password. **DO NOT** give your form a password. Click on the “Forms” button then click OK.

1. Fill in the form by clicking on the first *form field* . The field will turn dark gray when it is ready for you to enter information. After it has turned dark gray, type in your information. Use the TAB or the arrow keys to move to the next field.
2. To fill in a **selection box** ☐ either click inside the box or type an “X” then TAB to the next field.
3. After the form is filled out - On the **File** menu, click **Save As**.
4. In the **File name** box, type a name for your form. Be sure to save all materials to the “G” drive in the proper directory for your document (*do not save to your “C” drive, “C” drives are not on the network and do not get backed up*). Do not save your form back into the “Forms” directory on the “H” drive – you’ll mess up the form for everyone else if you do. If you are confused as to where to save your form, save it in your personal folder on the “G” drive. You can move it to the proper folder later when you decide exactly where it should be.

IMPORTANT NOTE: If you need to edit the body of the text that is not inside a form field, you must “unprotect” the document. Do this after you SAVE AS.

To unprotect, click on “TOOLS” then click on “UNPROTECT”. You can now edit text that is outside the form fields. ***Do NOT “protect” the document after “un-protecting” it. Doing so will cause all the information you have typed in the form fields to be deleted.***

Also, to edit text you have entered in a form field, click to insert your cursor either before or after the grayed out area then “arrow” the cursor to the location where you wish to make the edits. The form fields will not allow you to edit otherwise.

(BOMA rules for editing text are: “no text is to be added to or deleted from BOMA forms. To show text that is not to be included in the lease, select the text then use the “strike-out” tool – found under FORMAT then TEXT. To ADD text to the document use a different font, one size larger than the main body of the document and make it BOLD).

SAVE again before exiting the document.

ANOTHER NOTE: Microsoft did not provide a spell check program for checking information entered into a field. You will have to check your own work carefully within the fields.