

Designing forms for the next century!

I do not want to presume that everyone knows how to design and create a form using a word processing program. We will review how it has been done in the past.

The procedures that were utilized were:

1. We would open our word processing program.
2. A blank page would appear and we use it to design our form.
3. We would then type the information to identify what the form was for. For example: Membership Application
4. We would push the "enter" key as many times as we would want blank lines to be before the information that we were requesting.
5. We would then type **NAME** and then holding down the shift key, and pressing the dash line we would get a solid line where the person would then write in their name on the hard copy form.
6. We would either a space or tab if there was additional information to be entered on that same line or we would press the enter key to go to the next line.
7. We would continue this procedure until we completed the form.
8. We would then save the file labeling it with what the form was to be used for. For example: Membership application 2005
9. Then the form would be printed and distributed to the prospective new members to complete and return to the Membership Chairperson.

Now that we are using the internet to find websites it is only natural that we want to also be able to complete the forms on the internet or online.

So what do we mean designing forms for the next century? The form should be easy to fill in on the computer, should have blocks that do not move, and should look exactly the same after the information has been entered as it was before you started. That does not happen with the way we use to create our forms.

What do you mean use to create our forms? When we created our forms utilizing a word processing program we would type in the identifier such as Name, Address, Telephone #, Email address just to name a few fields. Then we would create a line to indicate where the information was to go. This was absolutely correct because in the old days we would print it, then hand it out, mail it or fax it to the person that needed to complete it. That person would then complete the form and return to the sender. The forms look very professional and impressive. **BUT**, we still are using that same process today when we design our forms and use them on the internet or emailed it to someone to complete and return to us.

So what happens to the form? I am sure that this has happened to all of us at one time or another. We start to type our Name on the line and as we type our name the line continues to grow and when we are finished our name is not underlined and the line could actually be on the next line. If this form that we are completing has many questions or fields to complete we could end up with at least 2 pages if not more. Now that is not very professional looking don't you agree?

How do we resolve this situation? We continue to use our word processing program but we design the form differently.

I am always asked the same question. Is it really that easy? What is the catch! My answer is that we need to learn how to use TABLES.

You still need to plan out what you want the form to look like before actually creating the table. This phase is no different then what you have always done in preparing to create a form or document in the past. The difference is that we need to be more structured and consist when we design our forms. A form can have a number of separate tables because one section may require more or less information.

Example #1: You are requesting information about the individual completing the form you may only need the persons name, address, telephone number, and email address. This table may consist of only 4 rows and 2 columns.

Example #2: You are requesting information about the individual completing the form you may need the persons name, address, telephone number, cell number, fax number, and email address. This table may consist of only 4 rows and up to 4 columns in some of the rows.


As you will see the number of rows and columns can vary based upon your needs.

What is a TABLE?


A table is made up of rows and columns of cells that you can fill with text and/or graphics. Tables are often used to organize, present information, and are used to fill in information.

You can also use tables to create interesting page layouts, or to create text, graphics and nested tables on a Web page.



How do I create a basic TABLE? There are a number of methods that you can use to create a basic table. You can use either the icons which are located on the Standard tool bar and are depicted by pictures  or you can use the commands and do the formatting yourself. Both methods will be explained below.

To use the Standard toolbar icons follow these procedures:

1. Click where you want to create a table.
2. Click **Insert Table**  on the **Standard** toolbar.

3. Drag to select the number of rows and columns you want. You can always insert additional rows or columns if you need them or you can delete the excess rows or columns if they are not needed.

You can also do any of the following:

Use the Insert Table command:

Use this procedure to make choices about the table dimensions and format before the table is inserted into a document.

1. Click where you want to create a table.
2. On the **Table** menu, point to **Insert**, and then click **Table**.
3. Under **Table size**, select the number of columns and rows.
4. Under **AutoFit behavior**, choose options to adjust table size.
5. You may not want to use a built-in table format if you are designing a fill in the blank form to be completed. If this table is for information that you will be supplying you may want to click **AutoFormat**. Select the options you want.
6. Then OK
7. When you have entered all of the information about the table then click OK and the basic table will be created for you.

All tables will look like this after they have been created unless you have formatted them in the insert table commands procedures. When creating a form you generally want to do the formatting yourself because each box may need to have a different format.

This is the **original table** of 3 rows and 3 columns

In the following examples we are starting with the same table of 3 rows and 3 columns.

Example # 1

This table now has 3 rows and 2 of the rows have 3 columns and 1 row has 2 columns

Two of the columns in row 2 have been merged together. This is accomplished by highlighting the 2 columns that you want to merge together and using the Table command Merge Cells.

Example # 2

This table now has 3 rows and 1 of the rows has 3 columns and 2 rows have 2 columns

For this example line 1 and 2 in column 1 were merged together. On line 1 and 2 columns 2 and 3 were merged together.

As you can see from the examples above you can create any type of table that you may need. Each box is called a CELL and it can be used to explain what you want to be filled in or it can be the cell that the information is entered.

For this demonstration we will have 3 separate tables for this membership application form.

Table # 1 is informational only. We will insert the Zonta logo, identify the purpose of this form and give the prospective member instructions. This table will need to be resized and have no borders or shading.

Table # 2 is informational only. It was created as a separate table because we wanted it to stand out.

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Table # 3 is where the prospective member will fill in the information being requested. This table was created with 4 rows and 4 columns because the majority of the rows required 2 informational cells and 2 fill in the blank cells. Only 1 row required 2 columns instead of the 4. As previously explained columns 2, 3, and 4 in row 2 were merged together.

Table #1



**ZONTA CLUB OF BOCA RATON AREA
MEMBERSHIP APPLICATION**

(this form can be completed online, printed and faxed, or saved to your desktop and emailed)

Table #2

Candidate Information

Table #3

Full name		Date	
Home address			
Home telephone		Home fax	
Home email		Cellular telephone	

After you have entered the labels and comments, you will need to remove all of the box lines that were inserted when the table was created, and format only the lines that you want the table to include. You will use the Borders and Shading command. You will need to highlight all of the rows and columns that you want to change. The shortcut to access the Borders and Shading command will be to use your right mouse button and then click on Borders and Shading. A box will appear that will allow you to remove the lines or insert additional lines.



ZONTA CLUB OF BOCA RATON AREA MEMBERSHIP APPLICATION

(this form can be completed online, printed and faxed, or saved to your desktop and emailed)

Candidate Information

Full name _____ Date _____
Home address _____
Home telephone _____ Home fax _____
Home email _____ Cellular telephone _____

Now that you have created the form you will need to add fields to the form. In Microsoft Word if you do not have the "Forms" icons available go to View → Toolbars → Forms. You can insert a field for alphabetic information, a check box, Drop down field box, form field shading and when completed you can set a password to protect the form from changes by Tools → Protect Documents then set the password. You will only see the fields when you have to form open on the screen.



ZONTA CLUB OF BOCA RATON AREA MEMBERSHIP APPLICATION

(this form can be completed online, printed and faxed, or saved to your desktop and emailed)

Candidate Information

Full name _____ Date _____
Home address _____
Home telephone _____ Home fax _____
Home email _____ Cellular telephone _____

This completed form will be emailed to a prospective member, published to the Clubs website where a prospective member will complete the form and either print it and mail to our Membership Chair or return it by email to our Membership Chair.

This is an example of what the completed form will look like.



ZONTA CLUB OF BOCA RATON AREA MEMBERSHIP APPLICATION

(this form can be completed online, printed and faxed, or saved to your desktop and emailed)

Candidate Information

Full name Alice Chick Date Today's date

Home address 115 SW 89th Way Coral Springs, Florida 33071

Home telephone 954-753-7957 Home fax 954-346-9517

Home email alice@chickkaro.com Cellular telephone 954-675-2193

This form looks very impressive and professional and a prospective member will want to join your Club.

Good luck in designing and developing your forms. If you have any questions or problems, using the information above give me a call or send me an email and I will try to assist in resolving your issue.