

University Information Technology Services

Microsoft Office Word 2016 for Windows

Mail Merge and Creating Forms

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

Copyright © 2016 KSU Division of University Information Technology Services This document may be downloaded, printed, or copied for educational use without further permission of the University Information Technology Services Division (UITS), provided the content is not modified and this statement is not removed. Any use not stated above requires the written consent of the UITS Division. The distribution of a copy of this document via the Internet or other electronic medium without the written permission of the KSU - UITS Division is expressly prohibited. Published by Kennesaw State University – UITS 2016 The publisher makes no warranties as to the accuracy of the material contained in this document and therefore is not responsible for any damages or liabilities incurred from UITS use.

Microsoft product screenshot(s) reprinted with permission from Microsoft Corporation.

Microsoft, Microsoft Office, and Microsoft Word are trademarks of the Microsoft Corporation.

University Information Technology Services

Microsoft Office: Word 2016 for Windows Mail Merge and Creating Forms

Table of Contents

Introduction	4
Learning Objectives	4
Creating Forms	5
Enable the Developer Tab	5
Beginning Your Form	6
Inserting Content Controls	7
Replacing Instructional Text	8
Setting Content Control Properties	9
Rich Text and Plain Text Properties	10
Combo Box and Drop-down List Properties	11
Date Picker Properties	12
Picture Properties	13
Check Box Properties	13
Lock and Restrict Your Form	14
Lock Content	14
Restrict Editing	15
Unlocking a Form	16
Saving Your Fillable Form as a Template	17
Mail Merge	17
Using the Mail Merge Wizard	18
Using the Mail Merge Wizard to Create Your Own List of Recipients	26
Matching Fields	27
Additional Help	28

Introduction

This booklet is the companion document to the Word 2016: Mail Merge and Creating Forms workshop. The booklet will show users how to create fillable forms, restrict editing in the forms, and save the form as a template. This booklet will also show how to use the Mail Merge Wizard to quickly create personalized letters to multiple people.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Create fillable forms in Word.
- Add the Developer tab to the Ribbon.
- Recognize content controls and how to add them to your form.
- Lock and restrict your form.
- Save your form as a template.
- Unlock a form.
- Use the Mail Merge Wizard.
- Reassign fields using the matching fields tool.

Revised: 6/29/2016 Page 4 of 28

Creating Forms

You can create fillable forms in Word that can be used to collect information, and when building your form, you can add a variety of tools to assist with data collection.

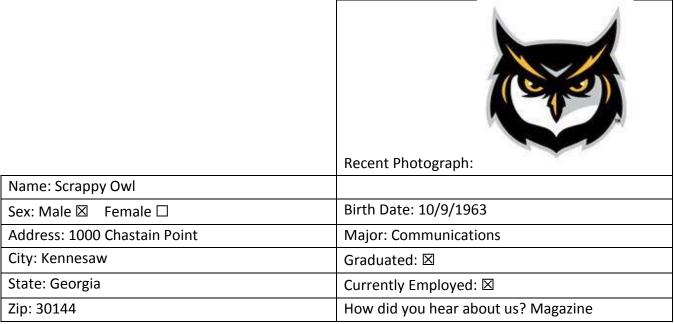


Figure 1 - Example Form

Once your form is complete, you can then save it as a template, so that the user fills in a copy and the original (template) does not change. This section on Creating Forms will explain how to re-create the Example Form above.

Enable the Developer Tab

Before you can begin creating your form, you will need to make sure the *Developer* tab is displayed in your *Ribbon*. The *Developer Tab* contains the tools necessary to create your form. If you do not see the *Developer* tab, follow the steps below to activate it:

- 1. Click the File tab.
- 2. In the Backstage View, click Options.

Click here to download full PDF material