KENNESAW STATE UNIVERSITY

University Information Technology Services

Microsoft Office Word 2016 for Windows

Mail Merge and Creating Forms

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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University Information Technology Services

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

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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.

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.

	Recent Photograph:
Name: Scrappy Owl	
Sex: Male ☒ Female ☐	Birth Date: 10/9/1963
Address: 1000 Chastain Point	Major: Communications
City: Kennesaw	Graduated: ☒
State: Georgia	Currently Employed: ☒
Zip: 30144	How did you hear about us? Magazine

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**.

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