



# Microsoft Office Word 2013

Mail Merge and Creating Forms

University Information Technology Services

Training, Outreach, Learning Technologies and Video Production

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# University Information Technology Services

## Microsoft Office Word 2013 Mail Merge and Creating Forms

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## **Introduction**

This booklet is the companion document to the Word 2013: 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
- Understand content controls and how to add them to your form
- How to lock and restrict your form
- How to save your form as a template
- How to unlock a form
- How to use the Mail Merge Wizard
- How to reassign fields using the matching fields tool

## Creating Forms

You can create fillable forms in Word 2013 that can be used to collect information, and when building your form, you can add a variety of tools to assist with data collection (See Figure 1).


	
Recent Photograph:	
Name: Scrappy Owl	
Sex: Male <input checked="" type="checkbox"/> Female <input type="checkbox"/>	Birth Date: 10/9/1963
Address: 1000 Chastain Point	Major: Communications
City: Kennesaw	Graduated: <input checked="" type="checkbox"/>
State: Georgia	Currently Employed: <input checked="" type="checkbox"/>
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* (See Figure 2). The *Developer Tab* contains the tools necessary to create your form.



Figure 2 - Developer Tab

If you do not see the *Developer* tab, follow the steps below to activate it:

1. Right-click on any **blank area** within the *Ribbon*.

2. A context sensitive menu will appear. Click on **Customize the Ribbon...** (See Figure 3).



Figure 3 - Customize the Ribbon

3. The *Word Options – Customize the Ribbon* window will appear. In the right list, check the box for **Developer** (See Figure 4).

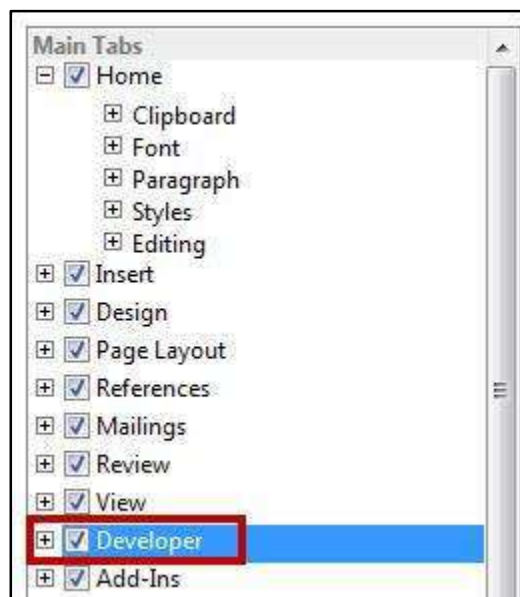


Figure 4 - Adding Developer Tab

4. Click on **OK**. The *Developer Tab* will be added to the *Ribbon*.

## Beginning your Form

The easiest way to create fields for your form is to create a table, then insert the sections of your form. The following will show how to begin your form:

1. Click on the **Insert** tab (See Figure 5).



Figure 5 - Insert Tab

**This is a sample, click download link to get the full Tutorial**

**CLICK BELOW**

