

1

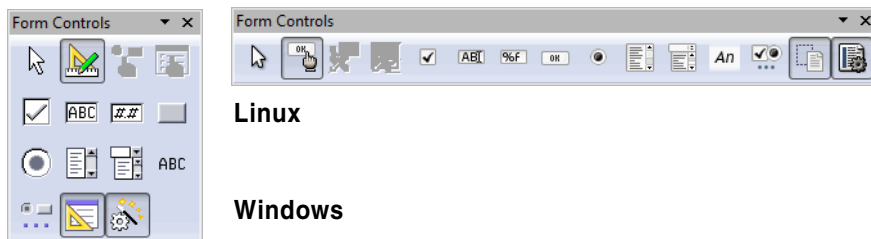
Creating Forms From Scratch

This section covers how to create a data entry form from scratch that doesn't connect to a database. Users can save the values in the form, and print the form.

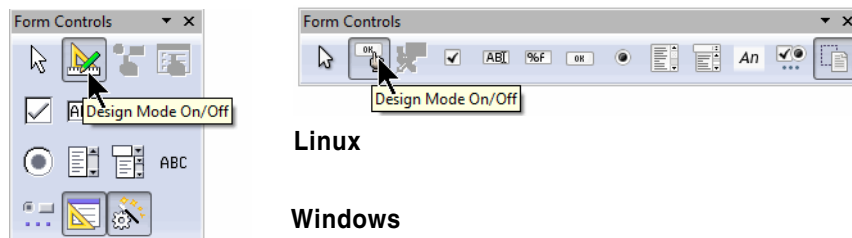
You can also create a PDF version of the form to make available on the web. Users can't save values in that form but they can fill it out and print it.

Creating a Simple Form

- 1 Start OpenOffice.org and choose File > New > Text Document.
- 2 You'll need to bring up the toolbars containing the tools you need. Choose View > Toolbars > Form Controls. This is the toolbar that lets you choose specific fields such as check boxes and text fields. It looks different depending on your operating system; use the tooltips to ensure you're getting the field you want by moving your mouse over each icon and reading the tip that appears.

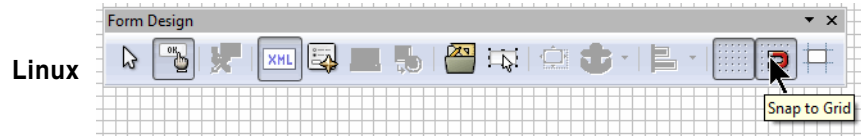
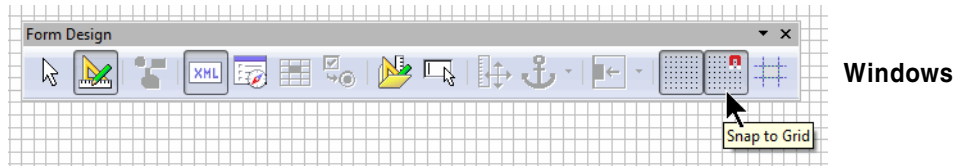


- 3 You want to be in form design mode, not form use mode. Move your mouse over the Design Mode On/Off icon; see below. If the other icons are enabled as shown then you are in the correct mode, design mode; otherwise click the Design Mode On/Off icon to get into design mode.

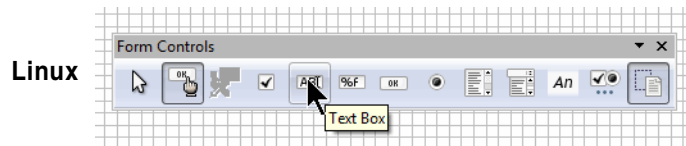
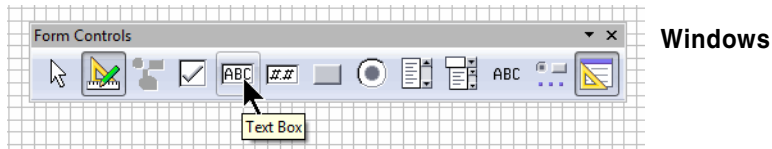


- 4 Choose View > Toolbars > Form Design. This toolbar lets you control form-level items.

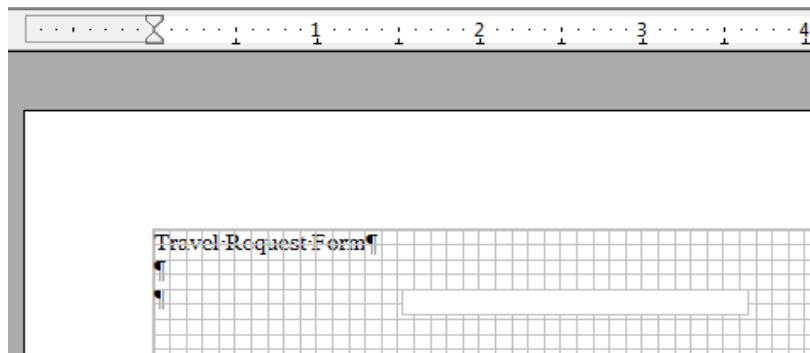
- 5 Click both the Display Grid and Snap to Grid icons. The toolbars and grid will look like this.



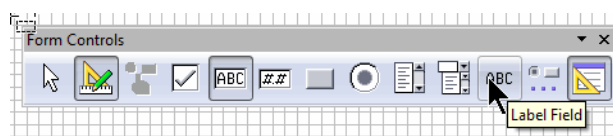
- 6 At the top of the document, type **Travel Request Form** and press Return a few times.
- 7 Choose View > Nonprinting Characters; you want a checkmark in front of it. This will let you more easily see how the form is created.
- 8 Now you're ready to start adding fields. On the Form Controls icon, click the Text Field icon.



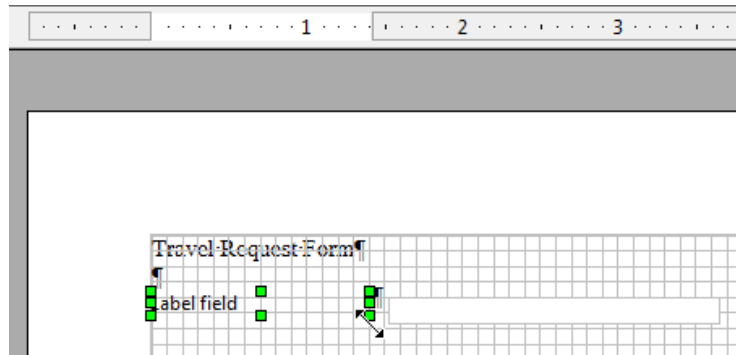
- 9 Move your mouse to the indicated area. Click and hold down the mouse, and start drawing a text box about an inch and a half in from the left. Draw a text box about two inches long, and release.



- 10 You'll also need a label for the field. Click on the Text Label icon.

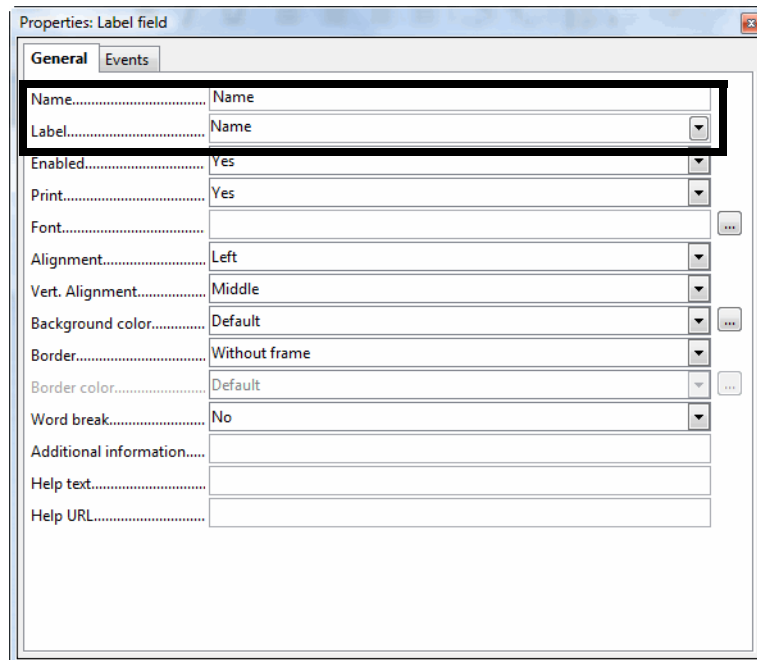


11 Draw a label field flush left with the left margin, and about an inch and a quarter wide, as shown.



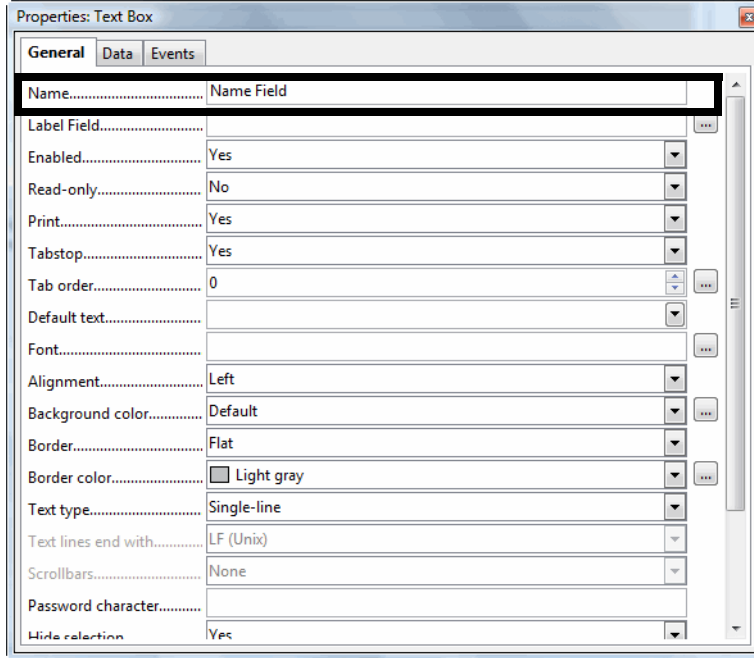
12 Double-click the Label Field.

13 In the Properties window, in the General tab, type **Name** in the first two fields, then close the window.

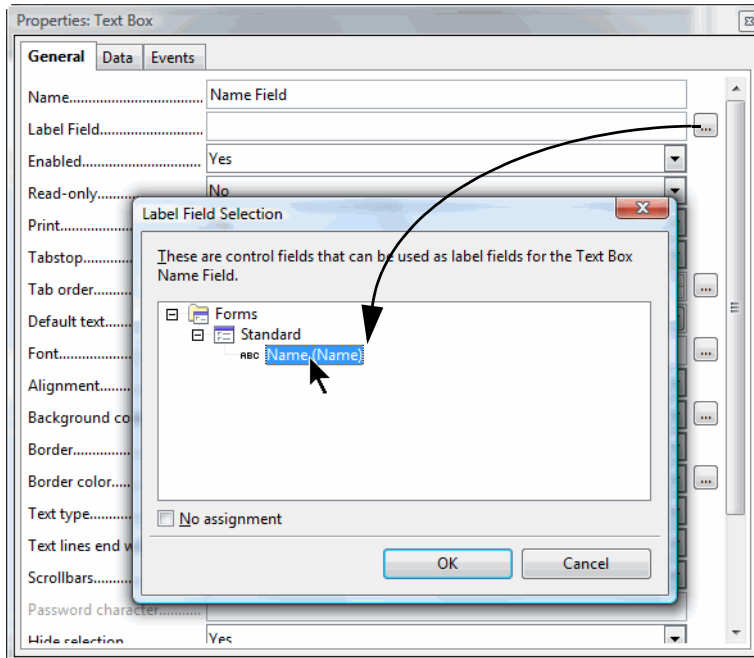


14 Double-click the text field.

15 In the Properties window, type **Name Field** in the Name field.



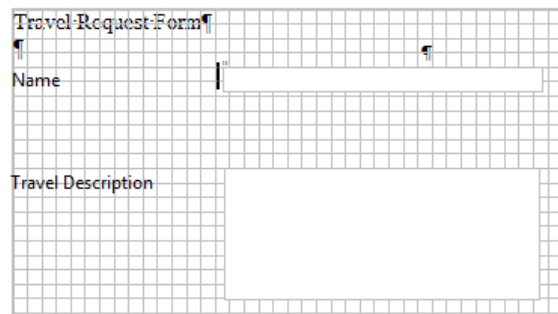
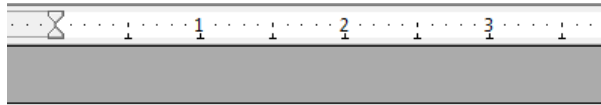
16 Click the browse button in the Label Field field and select the Name text label. This associates the text label and its field.



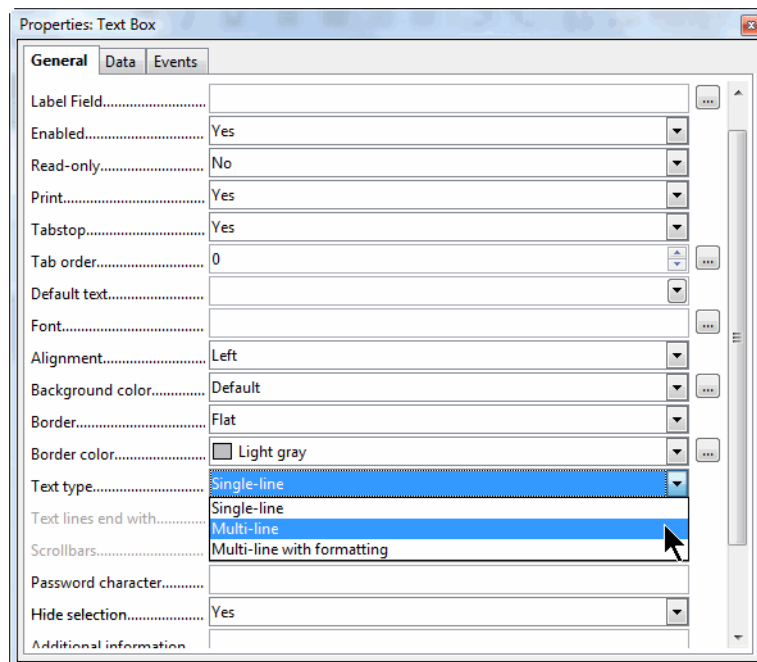
17 Click OK.

18 Close the properties window.

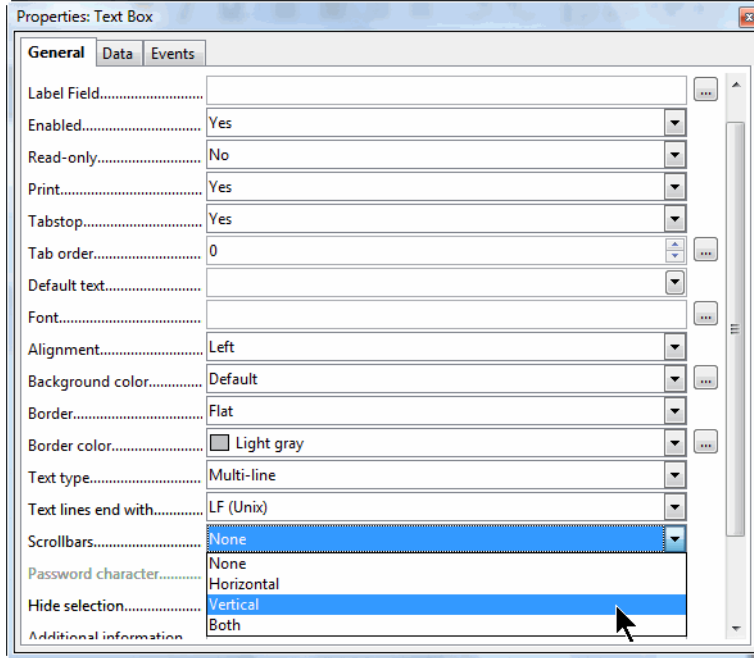
- 19 Create another set of text boxes and labels. Make the text box about an inch high, and call the label Travel Description.



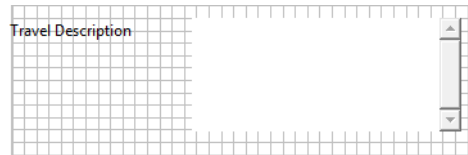
- 20 Double-click the Travel Description text box. Type the name Travel Description field and assign the text label Travel Description.
- 21 Select Multi-Line as shown.



22 In the same window, select Vertical scroll bars.

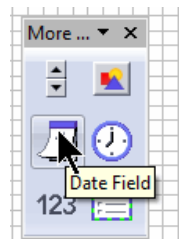


23 Close the properties window. The text box should look like this.



24 Create another text label; call it Travel Date.

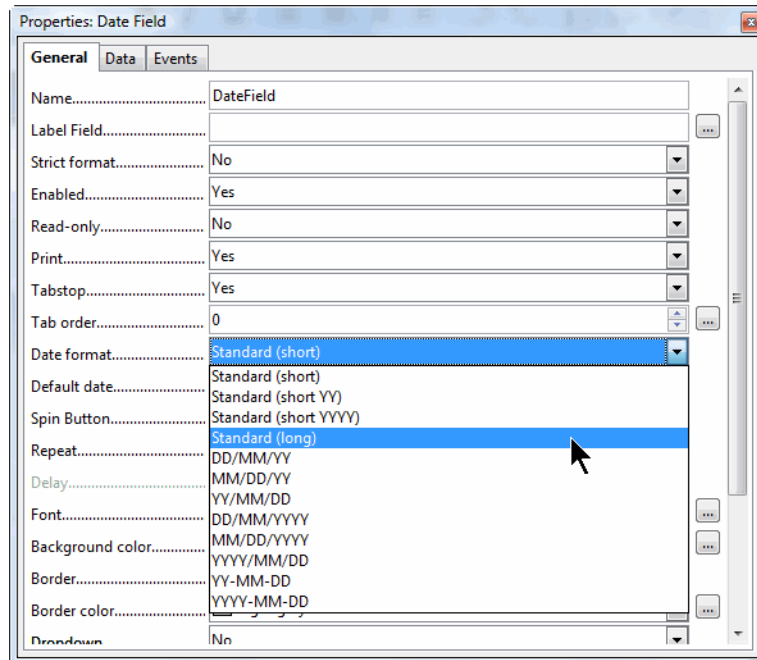
25 On the Form Controls toolbar click More Controls, then in the More Controls toolbar, click the Date Field icon.



26 Draw the date field.

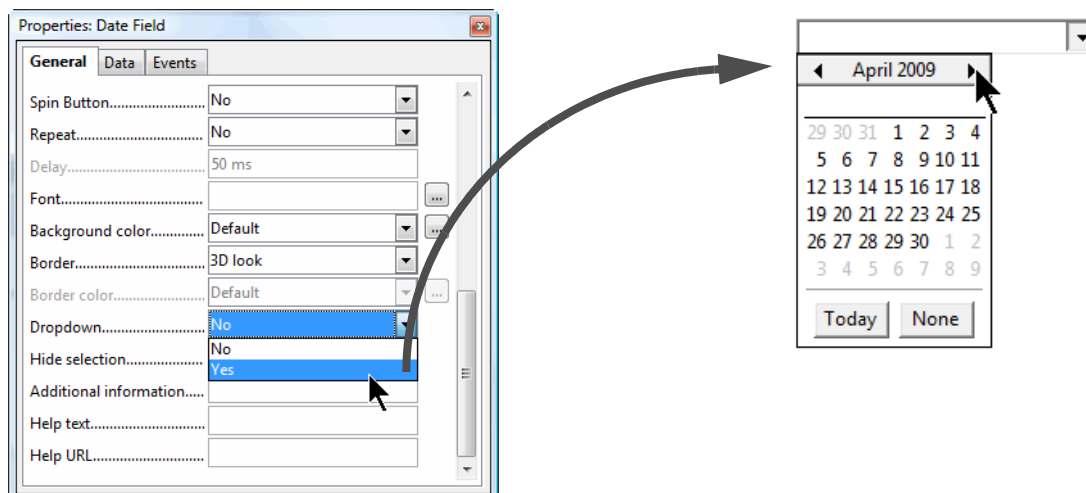
27 Double-click the date field.

28 From the Data Format field, select Standard (long).



29 In the name field, type **Travel Date Field** and assign the Travel Date text label.

30 Optional: In the Dropdown list field, select **Yes**. This will give you a small calendar palette that will help users specify dates when the form is in use mode (not edit mode).



31 Close the properties window.

32 Move the labels closer together vertically.

33 Click the Design Mode On/Off icon.



Windows



Linux

- 34** Enter information in each field to test it. The form should look like this. (If the fields aren't quite even, you'll align them in the alignment exercise later.)

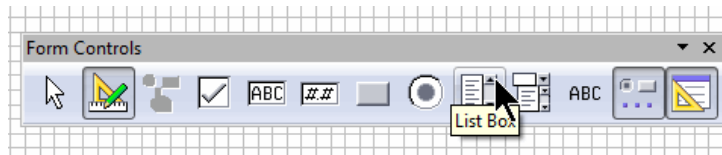
Travel Request Form

Name	Joanne Bancroft
Travel Description	Trip to the ALC convention to verify that we are doing all we can to keep current with ALC technology trends.
Travel Date	Wednesday, May 6, 2009

- 35** Save the form; you'll use it in the next lesson.

Adding Lists, Numeric Fields, and Checkboxes to a Form

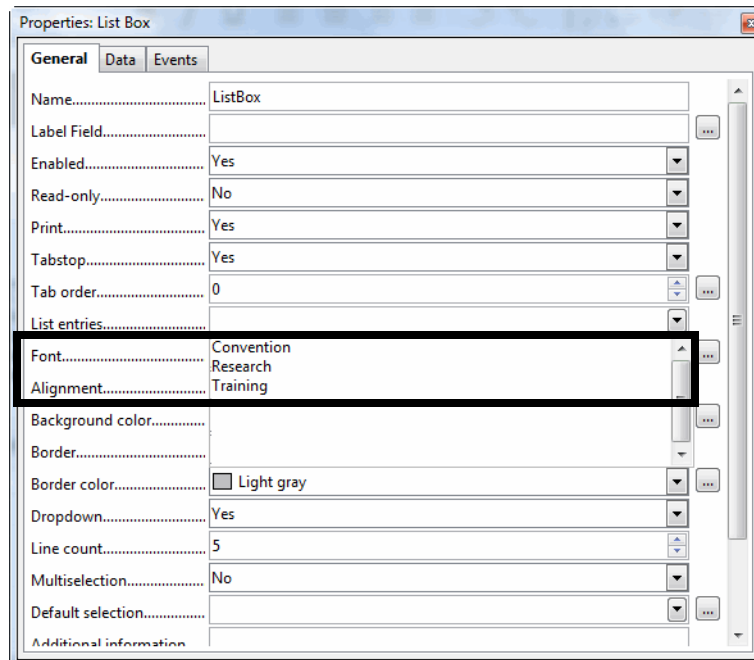
- 1 Be sure the form from the last lesson is open.
- 2 If necessary, click the Form Design On/Off to get back into edit mode. You're going to create a list for the form from which to choose the travel type.
- 3 Create a text label called **Travel Type**, below the last label.
- 4 Click the List Box icon.



- 5 Draw a normal-sized field. The label and field should look like this.

 A screenshot of a form titled 'Travel Request Form'. The form contains several fields: 'Name' with the value 'Joanne Bancroft', 'Travel Description' with a multi-line text area containing 'Trip to the ALC convention to verify that we are doing all we can to keep current with ALC technology trends.', 'Travel Date' with the value 'Wednesday, May 6, 2009', and 'Travel Type' which is a dropdown menu currently showing an empty field.

- 6 Double-click the list field. In the Properties field, in the List Values field, type the three values shown. After you type the first value, press Shift Enter; type the second value then type Shift Enter; type Shift Enter and press Enter.



- 7 Name the field **Travel Type field**, and assign the text label Travel Type.
- 8 Close the properties window.

9 Click the Design Mode On/Off icon.



Windows



Linux

10 Click the list and select a value.

11 Click the Design Mode On/Off icon.



Windows



Linux

12 Create a label field below the last label called **Reimbursement**.

13 Click the Check Box icon. Draw two check boxes as shown.

14 Double-click the first checkbox and in the properties window, type the name **Self Paid**. Assign the text label Reimbursement. Close the window.

15 Double-click the second checkbox and in the properties window, type the name **Company Paid**. Assign the text label Reimbursement. Close the window.

16 Click the Design Mode On/Off icon.

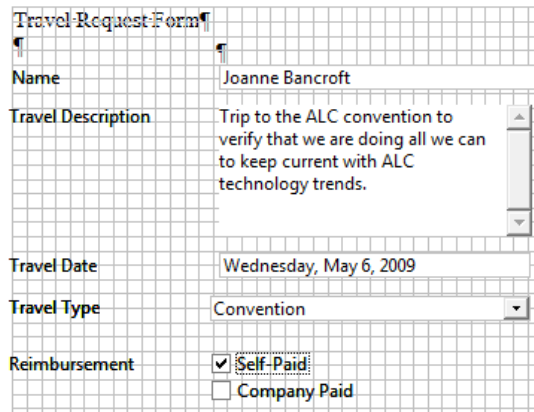


Windows



Linux

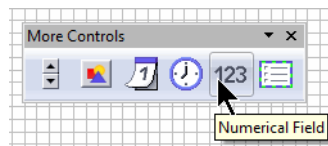
17 The form should look like this.



18 Click the Design Mode On/Off icon again to go back into edit mode.

19 Create another text label below the previous label, called **Number of Days**.

20 In the More Icons toolbar, click the Numeric Field icon. Draw a field the same size as the others.



21 Double-click the numeric field. Type the name **Number of Days field**.

22 Assign the field the text label Number of Days.

23 Close the properties window.

24 Click the Design Mode On/Off icon.



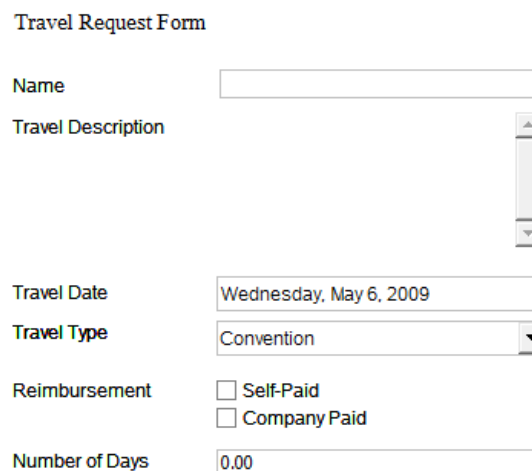
Windows



Linux

25 Type a numeric value in the Number of Days field.

26 The form should look like this (grid turned off in this illustration).



27 Click the Design Mode On/Off icon again to go back to design mode.

28 Save the form.

Creating Radio Buttons

Radio buttons are used for two or more items of which the user can only select one. Examples would be whether the event is for beginner or advanced users; on a weekday or a weekend, etc.

- 1 Be sure the form from the last lesson is open.
- 2 If necessary, click the Form Design On/Off to get back into edit mode. You're going to add another field. Employees need to currently be performing acceptably to travel for the company, so you're going to create a set of radio buttons allowing a user to specify only one current status level: below, at, or above expectations.



Windows



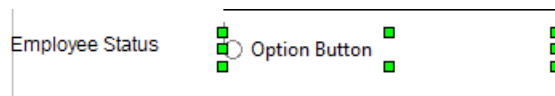
Linux

3 Create a text label called **Employee Status**, below the last label.

4 Click the Option Button icon.

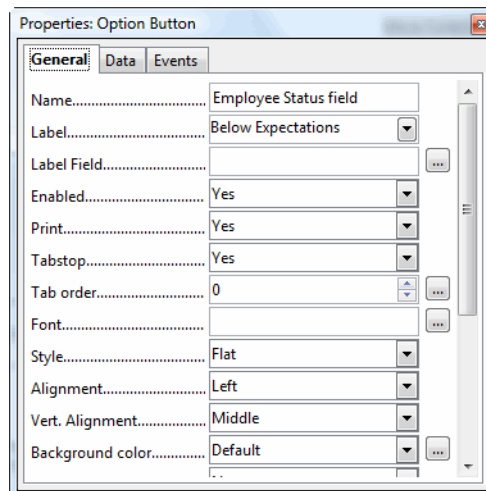


5 Draw an option button to the right of the Employee Status text box.



6 Double-click it to open the properties window.

7 Type the name **Employee Status Field**, and the label **Below Expectations**.



8 Close the properties window.

9 Copy the option button and paste it below the first one, or create another one.

- 10 Double-click the second radio button. For this one, be sure that the name is the same (**Employee Status Field**) but that the label is different, **Meets Expectations**.
- 11 Close the properties window.
- 12 Create or copy and paste a third radio button.
- 13 Set the same name (**Employee Status Field**) but with the label, **Exceeds Expectations**.
- 14 Close the properties window.
- 15 The form should look like this.
- 16 Click the Design Mode On/Off icon.



Windows



Linux

- 17 Select one of the radio buttons, then another. They will alternate; you can't select more than one at a time. This is because they all have the same name, so they work together.
- 18 The form should look like this (grid turned off in this illustration).

Travel Request Form

Name

Travel Description

Travel Date

Travel Type

Reimbursement Self-Paid
 Company Paid

Number of Days

Employee Status Below Expectations
 Meets Expectations
 Exceeds Expectations

- 19 Click the Design Mode On/Off icon again to go back to design mode.

Using Group Box Labels

The Group Box is a labeled shape that visually groups radio buttons. You can use it or the standard text label.

- 1 Be sure the form from the last lesson is open.
- 2 If necessary, click the Form Design On/Off to get back into edit mode. You're going to add two more radio buttons. Employees need to be able to specify their preference for what type of seat on the airplane, so that the in-house travel agency can make the best choices.



Windows

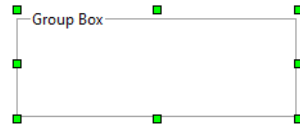


Linux

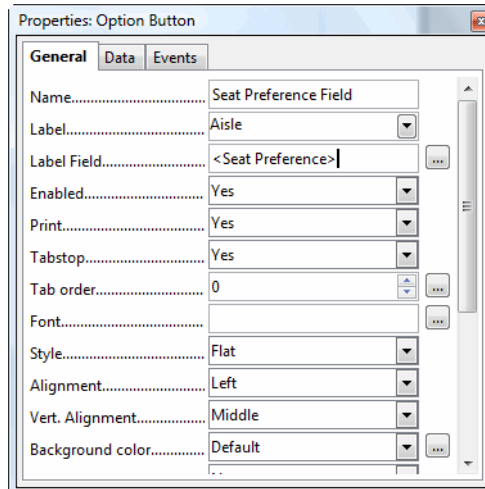
- 3 Click the Group Box icon (on the additional icons toolbar).



- 4 Draw a group box below the previous fields.



- 5 Double-click the group box. Type the name **Seat Preference** and the label **Seat Preference**.
- 6 Draw two option buttons inside the radio box. Double-click the first one. Specify the name **Seat Preference Field**, label as **Aisle**, and click the browse icon to specify the label field as Seat Preference.



- 7 Close the properties window.
- 8 Assign the same information to the other option button, but type the label **Window**.
- 9 Close the properties window.
- 10 Click the Design Mode On/Off icon.



Windows



Linux

- 11 Select one of the radio buttons, then the other. They will alternate; you can't select more than one at a time. This is because they all have the same name, so they work together.

12 The form should look like this (grid turned off in this illustration).

Travel Request Form

Name

Travel Description

Travel Date

Travel Type

Reimbursement Self-Paid
 Company Paid

Number of Days

Employee Status Below Expectations
 Meets Expectations
 Exceeds Expectations

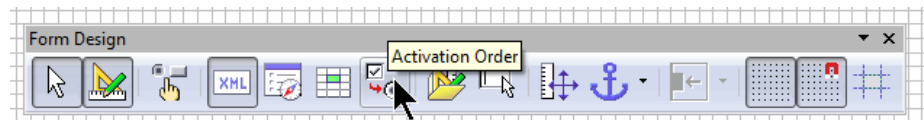
Seat Preference Aisle
 Window

13 Click the Design Mode On/Off icon again to go back to design mode.

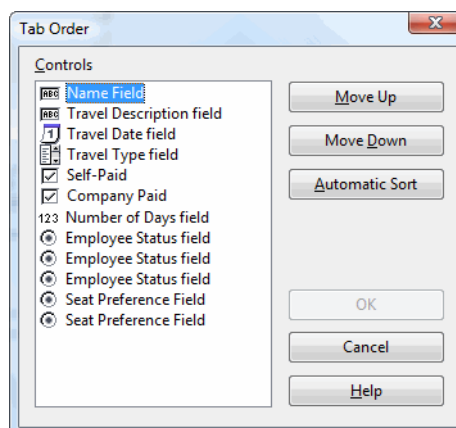
Assigning Tab Stop Order

Users press Tab to go from one field to another. You can control the order in which users get to the fields.

1 Click the Activation Order icon on the Form Design toolbar.



2 The Tab Order window shows the fields and the order in which a user will get to them using Tab.



3 Use the Move Up or Move Down arrows, or just click AutoSort, to put the fields in order from top to bottom of the form.

4 Click OK.

- 5 Click the Design Mode On/Off icon.



Windows



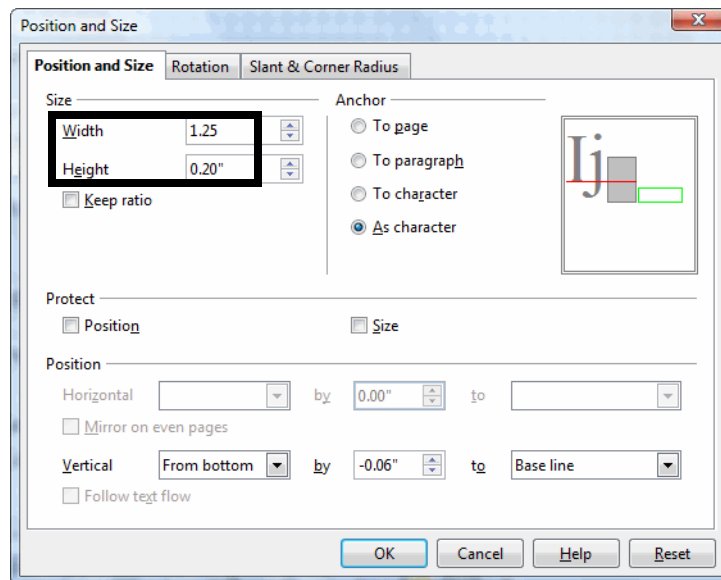
Linux

- 6 Click in the Name field and press Tab to test that the tab order is correct.
- 7 Click the Design Mode On/Off icon again to go back to design mode.
- 8 Save the form.

Specifying Field and Text Label Size

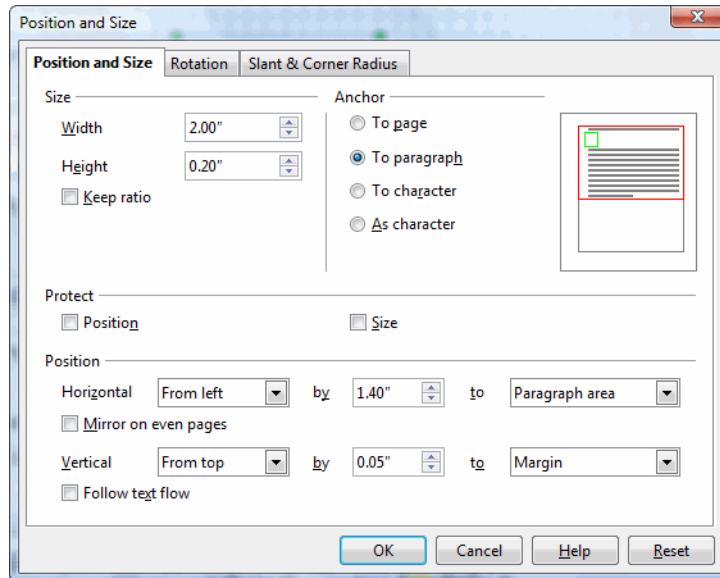
You can rely on the grid to ensure that the fields are similar heights and widths, or you can set it precisely yourself.

- 1 Select the first text label.
- 2 Right-click on the label and choose Position and Size.
- 3 In the Position and Size window, type a width and height for the box (not the text within the box). Type 1.25 as width and .2 as height.



- 4 Click OK.
- 5 Repeat for each text label.
- 6 Select the first field.
- 7 Right-click and choose Position and Size.

- 8 Type the width 2 and the height .20. (You can choose any height you like; .2 might be too short for some fonts.)



- 9 Click OK.

10 Repeat this for each additional field, except for the scrolling text field which should be an inch high.

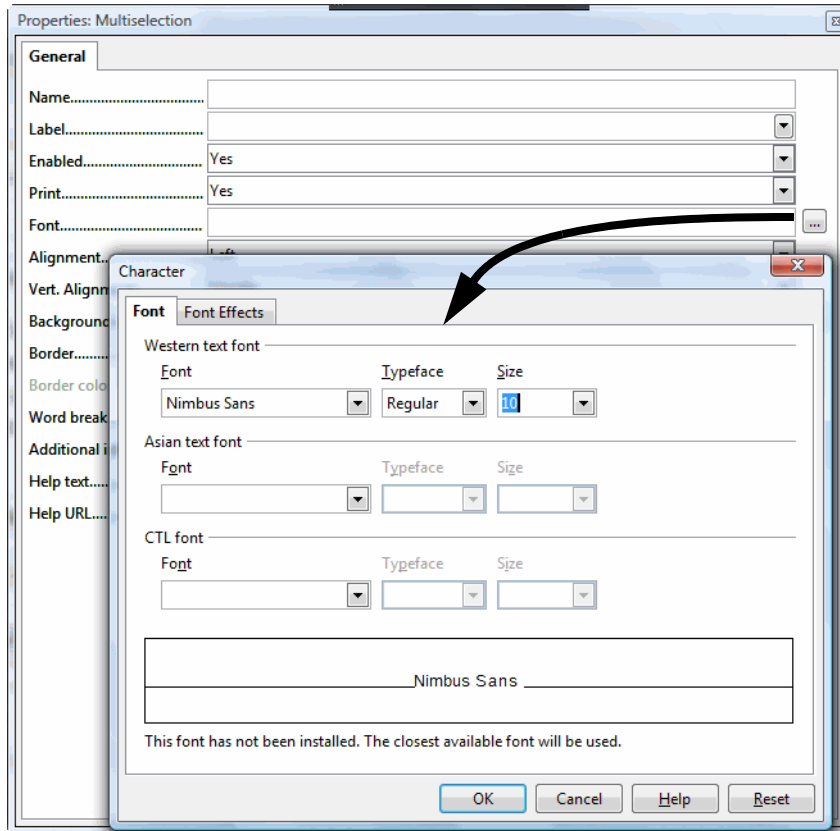
Note – A good way to make this a faster process is to apply the height and width when you create the first text label, then copy and paste the text label as you need more. You can also do this for fields of the same type, like text fields.

Formatting Form Controls

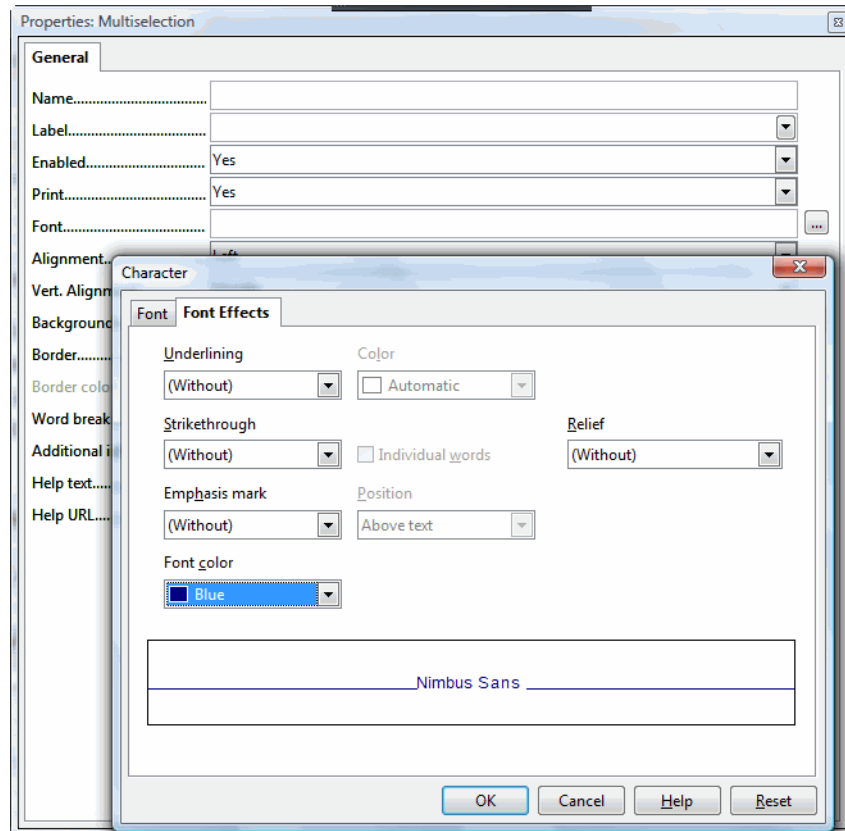
You can specify the font and other attributes of your text fields and labels.

- 1 Select all the text labels.
- 2 Right-click on one of them and choose Control.
- 3 In the Font field, click the browse icon.

4 Select a different font.

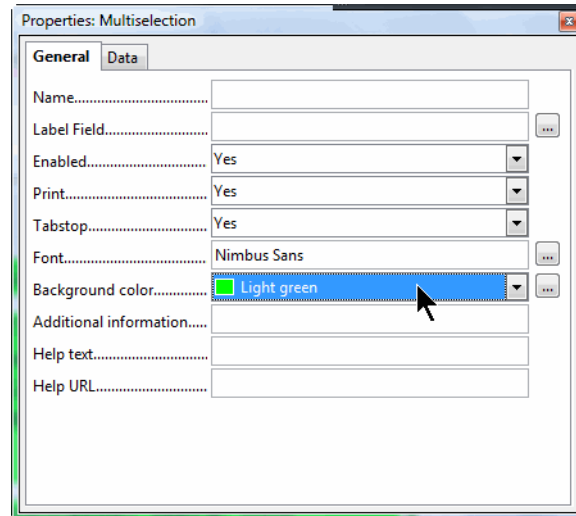


- 5 Click the Font Effects tab and, if you want, select a different font color.



- 6 Click OK.
- 7 Select all the fields.
- 8 Right-click on one of them and choose Control.
- 9 In the Font field, click the browse icon.
- 10 Select a different font.
- 11 Click the Font Effects tab and, if you want, select a different font color.
- 12 Click OK.

13 In the Background Color list of the properties window, select a different color.

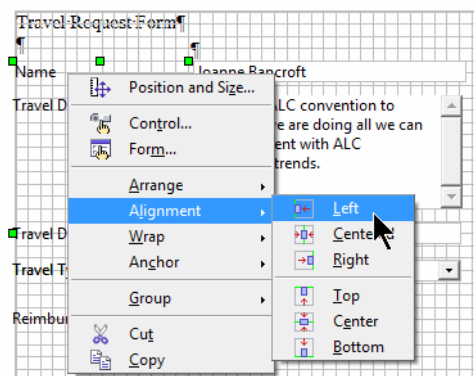


14 Close the properties window.

Aligning Form Controls

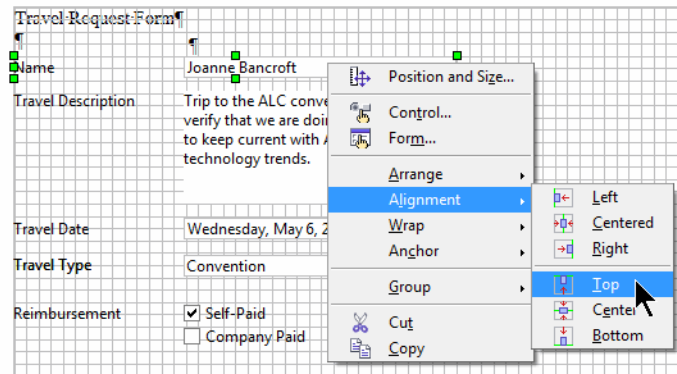
To be sure that the form looks good and prints correctly, align the fields using Alignment and Distribution. You can use the visual and snap-to grid, but alignment is another good approach.

- 1** Select all of the text labels. You can click the Select arrow icon on either form toolbar, then “draw” around all the text labels.
- 2** Right-click on one of the text labels and choose Alignment > Left.

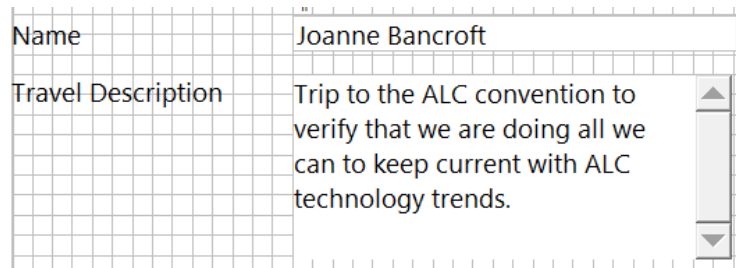


- 3** Align all the fields at the left, as well.

- 4 Select the first text label, and the corresponding field. Right-click on one of them and choose Alignment > Top.



- 5 Align all other text labels and the corresponding fields at the top. (For the checkboxes, just select the text label and the first check box.)
- 6 Now use the arrow keys on your computer to refine the vertical spacing. Select the second text label and field, and press the up or down arrow on your computer to space the fields a grid section apart. Vertically space the other fields evenly using the same technique.

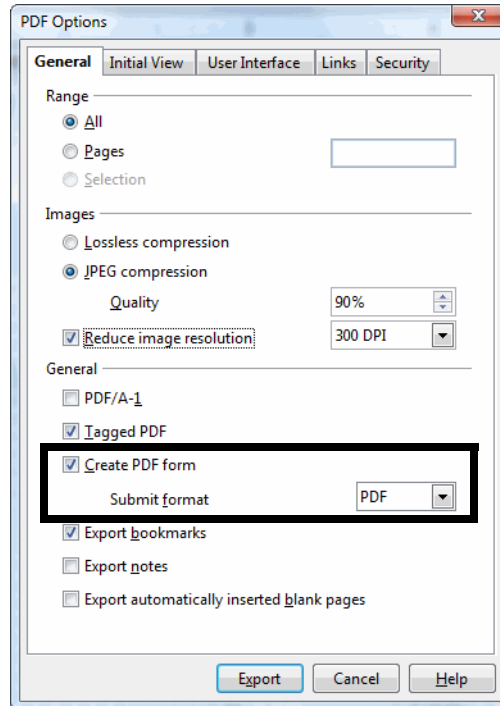


Creating a PDF Version of the Form

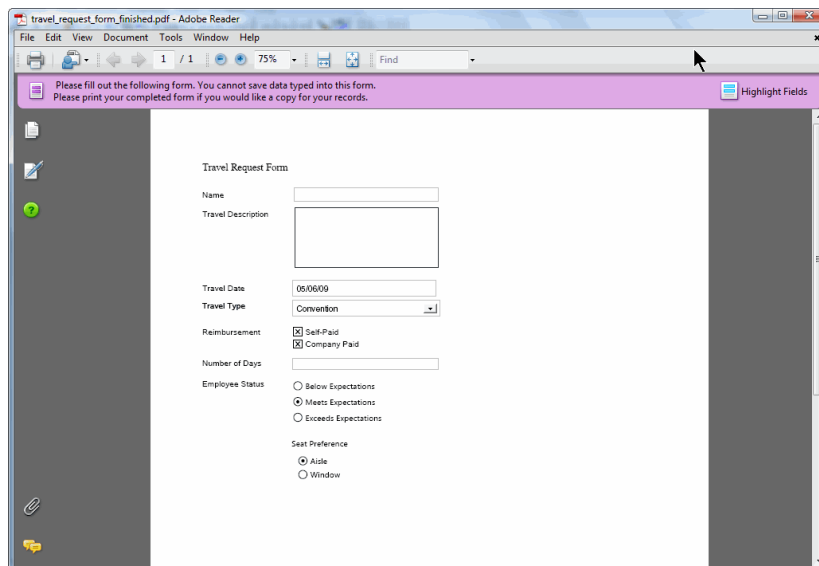
You can also create a PDF version of the form to make available on the web. Users can't save values in that form but they can fill it out and print it.

- 1 Choose File > Export as PDF.

- In the PDF Options window, be sure that Create PDF Form is selected and that the format is PDF.



- Click Export.
- Name the form and click Save; call it **formexport.pdf**.
- Start Adobe Reader and open the form.
- The form should look something like this.



- 7 Click the + icon at the top to view it larger, then fill it in. You can select the check boxes, the lists, and so on.

travel_request_form_finished.pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 75% Find

Please fill out the following form. You cannot save data typed into this form.
Please print your completed form if you would like a copy for your records. Highlight Fields

Travel Request Form

Name

Travel Description

Travel Date

Travel Type
Convention
Research
Training
Company Travel

Reimbursement

Number of Days

Employee Status
 Below Expectations
 Meets Expectations
 Exceeds Expectations

Seat Preference
 Aisle
 Window

You'll notice that the date does not convert to the long format but stays in standard short format. Also, the thousands separator doesn't appear by default.