Integrating Computers into Learning Activities and Demonstrations
Level   LBS 3

Filling Out Forms on a Computer

Goal: Comfortably navigate and fill out forms on a computer

Learning Outcomes: After completing this section, the student should be able to:

- Open a form in either Excel or Access
- Understand "fields" concept
- Understand how to move from one entry field to another
- Use different methods to fill in fields
- Save the completed form

Contents:

- How to start a program.
- How to open a form.
- Moving through a form using the keyboard
- Moving through a form using the mouse
- Filling in Fields
- Saving the file
- Hands on Forms Tutorial
- On your Own!

There are a number of different times you will be called upon to fill in forms on the computer. It is imperative that you are comfortable with the different procedures. We will look at a number of different methods including:
Filling in a pre-designed form created in Word, Excel and a form to set up an email service on the Internet.

Word:

Many people do not realize that Word comes with a number of templates and Wizards to help you set up a document. These Templates and Wizards enable you to create a professional document. The Wizard itself contains "forms" for you to fill out to personalize the document to you. To use the Wizards:

- Click on File

- Click on New

- (Note – this is not the same as using the New Document button on the Tool Bar.)

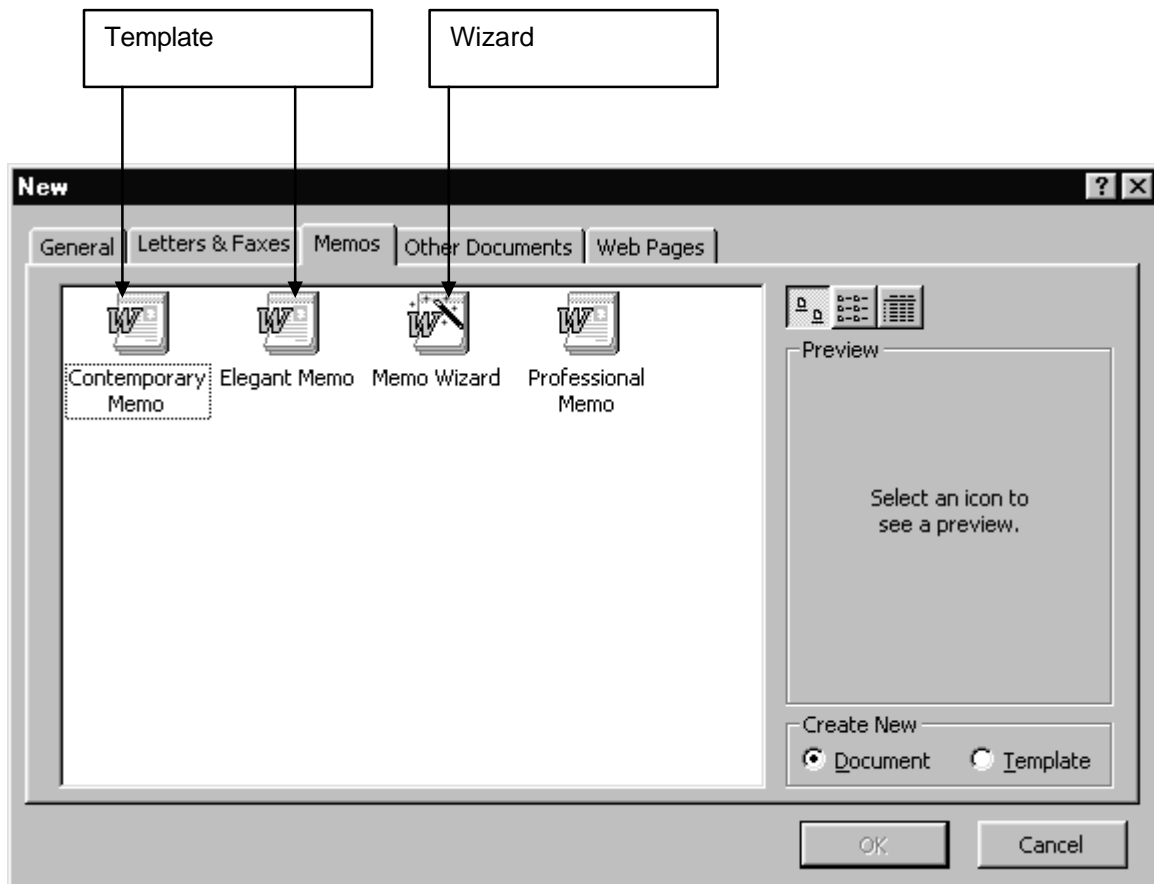You will be presented with a dialog box, similar to the example:
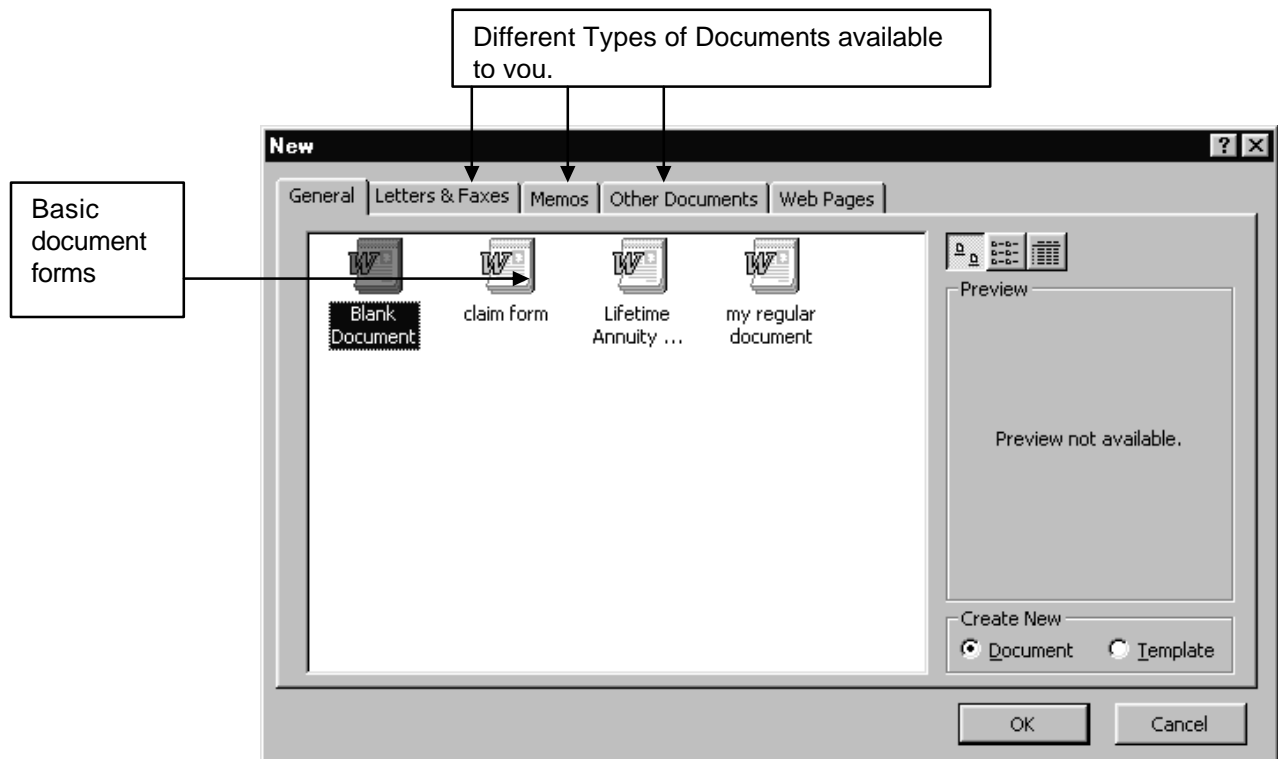
Click on the Tab Memos

The important thing to note is that there are two methods of using the pre-designed forms.
1.   Using one of the templates   OR
2.   Using a Wizard

You can easily identify the wizard by the "magic wand" on the icon

Template	Wizard

New ? ✕

General | Letters & Faxes | Memos | Other Documents | Web Pages

Contemporary Memo   Elegant Memo   Memo Wizard   Professional Memo

Preview

Select an icon to see a preview.

Create New
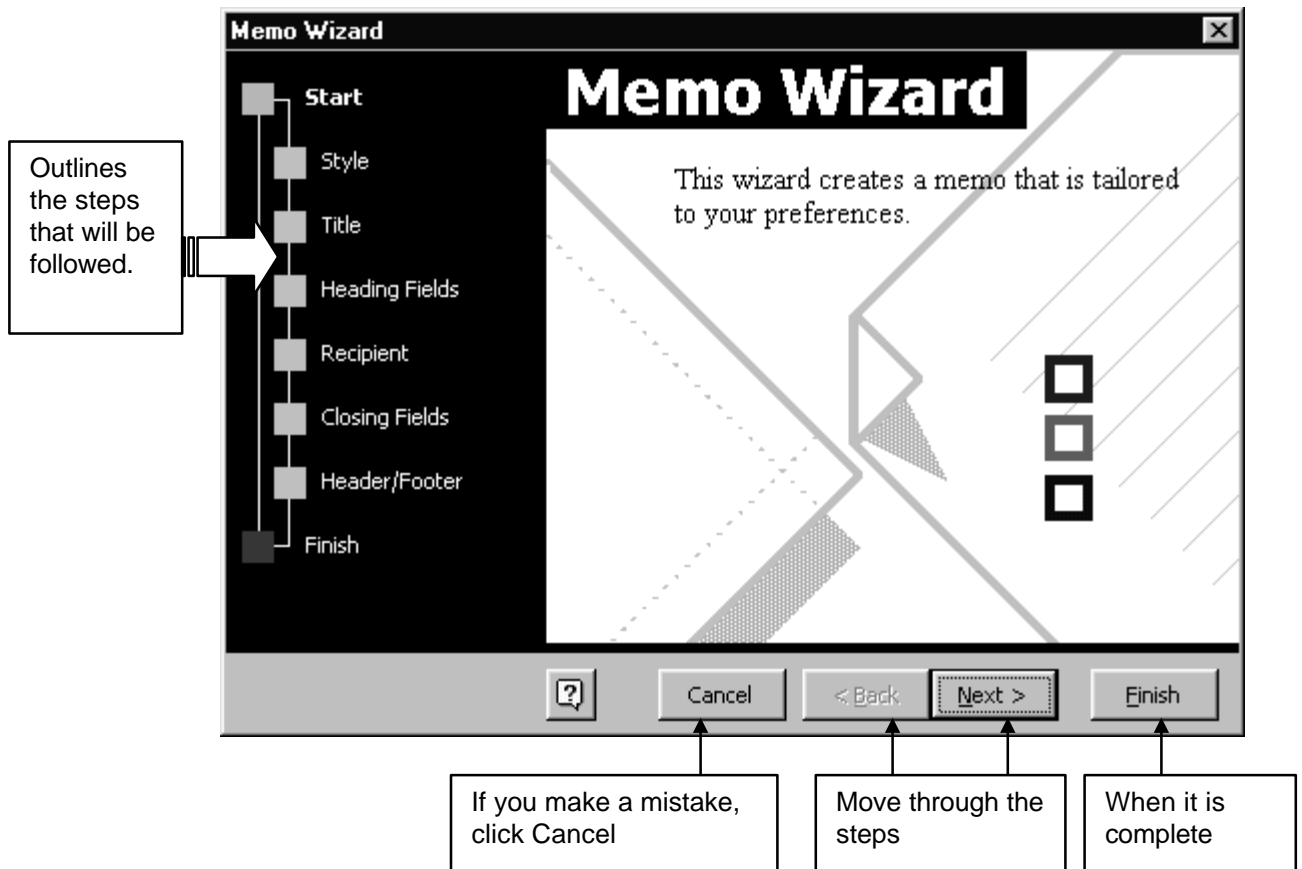◉ Document   ○ Template

OK   Cancel

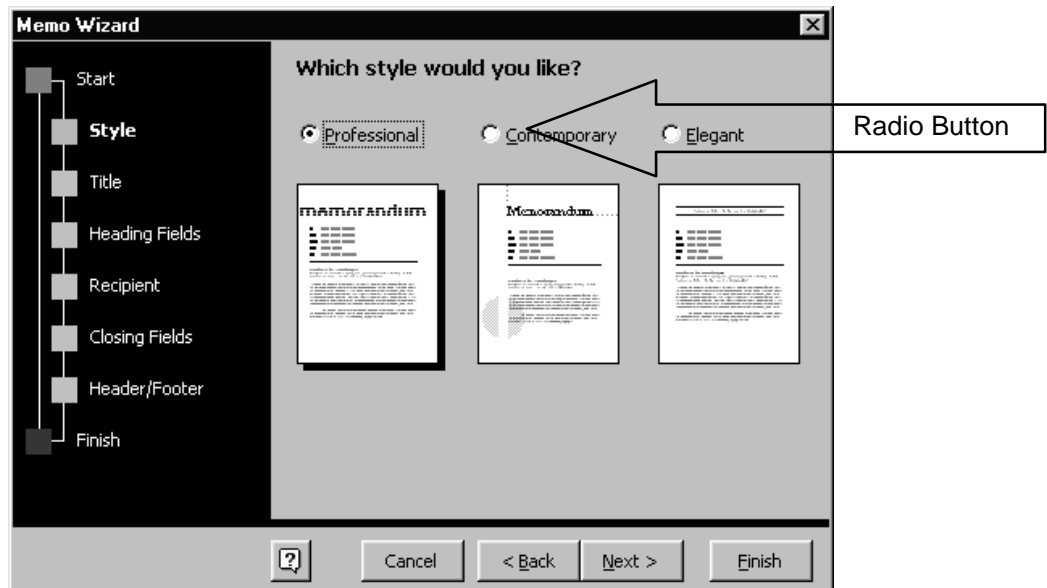Using Word's Wizard to create a Memo.

You should have Word open

1.   Click on File

2.   Click on New

3.   Click on the Memo Tab

4.   Click on the Memo Wizard

5.   Click on OK
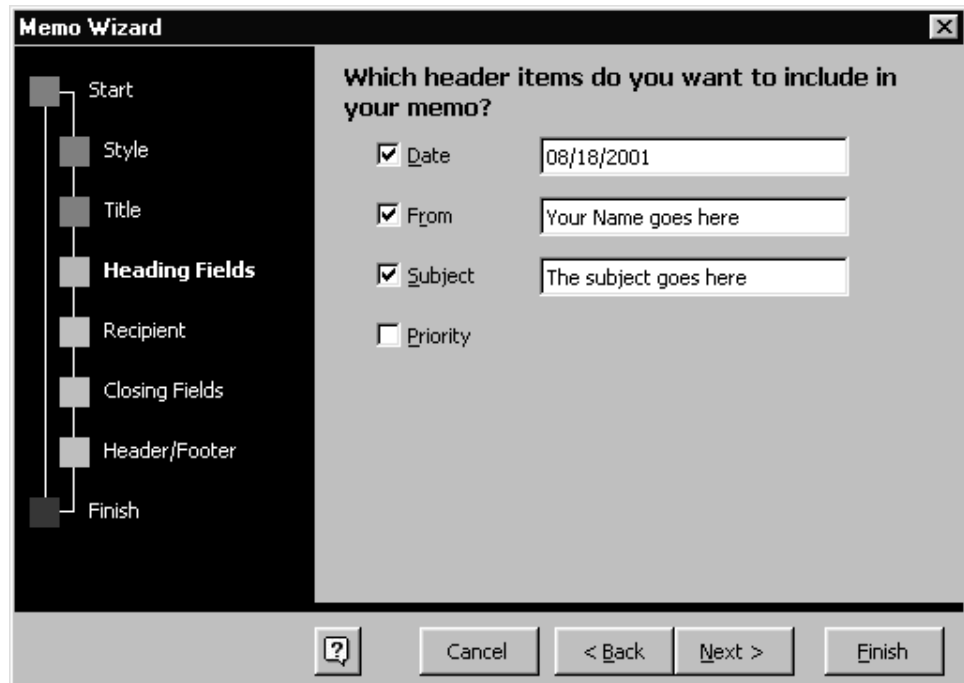
You will be presented with this dialog box:

Outlines the steps that will be followed.

Memo Wizard

Start

Style

Title

Heading Fields

Recipient

Closing Fields

Header/Footer

Finish

This wizard creates a memo that is tailored to your preferences.

Cancel | < Back | Next > | Finish

If you make a mistake, click Cancel

Move through the steps

When it is complete

6.   Click on Next. You are asked to choose a Style.

Memo Wizard

Start

Style

Title

Heading Fields

Recipient

Closing Fields

Header/Footer

Finish

Which style would you like?

○ Professional   ○ Contemporary   ○ Elegant

Radio Button

memorandum

Memorandum
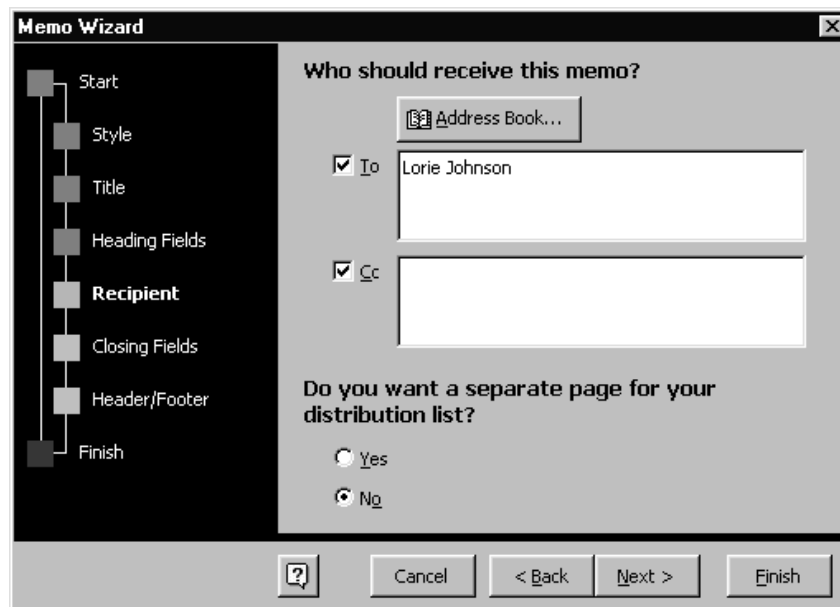
Cancel | < Back | Next > | Finish

7. We will change to Contemporary, by clicking on the Radio button, then Click on Next.

8. The next dialog box asks if you would like to use a title, or if you would like to use a preprinted form. We will simply click on Next.

Memo Wizard

- Start
- Style
- **Title**
- Heading Fields
- Recipient
- Closing Fields
- Header/Footer
- Finish

Do you want to include a title?

⦿ Yes. Use this text:

Interoffice Memo

○ No. I'll use my own memo form.

| Cancel | < Back | Next > | Finish |

9. You are now presented with a number of options to "fill in". If you want to include the date, who it is from, subject line and/or priority, you will need to click on the features you want. (If you want them included a ✓ needs to be in the box)

Memo Wizard

- Start
- Style
- Title
- **Heading Fields**
- Recipient
- Closing Fields
- Header/Footer
- Finish

Which header items do you want to include in your memo?

☑ Date   08/18/2001

☑ From   Your Name goes here

☑ Subject   The subject goes here

☐ Priority

| Cancel | < Back | Next > | Finish |

10.	We will include all items *except* Priority. Now, click in the box where the date appears. Press the TAB key on your keyboard twice. This should highlight the name box. If it is not your name, type in your full name correctly.

11.	Press the TAB key two more times. This will position your cursor in the Subject box. Type in the subject : **Investing** then click on Next.

12.	The new dialog box is asking who is to receive this memo. In the To Box, type Lorie Johnson, then click Next

Memo Wizard		
Start	**Who should receive this memo?**	
Style	🔲 Address Book...	
Title	☑ To	Lorie Johnson
Heading Fields		
Recipient	☑ Cc	
Closing Fields		
Header/Footer	**Do you want a separate page for your distribution list?**	
Finish	○ Yes	
	⦿ No	
	❓ Cancel < Back Next > Finish	

13.	You are now doing some fine-tuning on the Closing. We will just click on Next.

Memo Wizard	
Start	**Which closing items would you like?**
Style	☐ Writer's initials:
Title	☐ Typist's initials:
Heading Fields	☐ Enclosures:
Recipient	☐ Attachments
Closing Fields	
Header/Footer	
Finish	
	❓ Cancel < Back Next > Finish

14. This final Screen, deals with information in case your memo is more than one page long. Ours is not, so click on Finish.
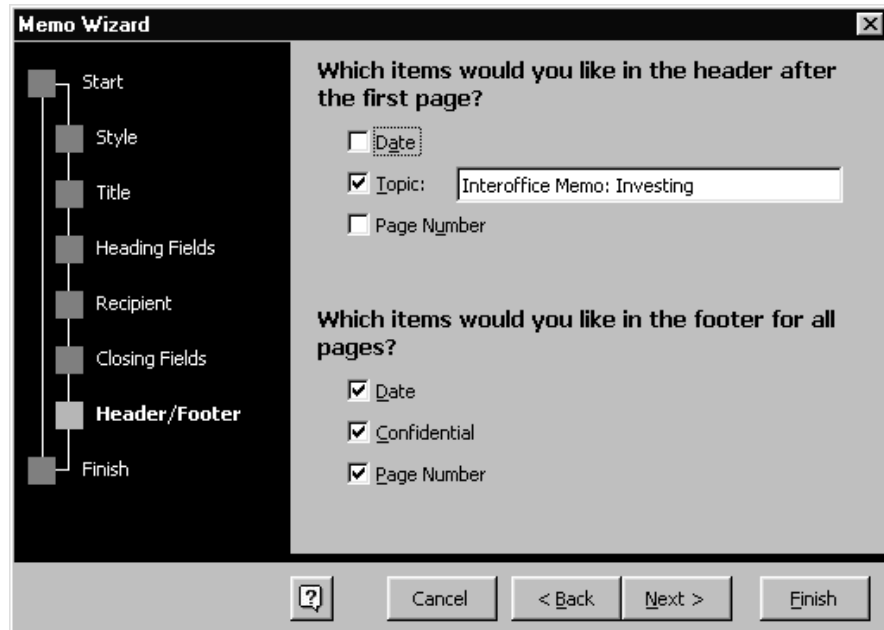
15. Your Memo is created and is on the document screen. The Office Assistant, help may appear. If you needed any of the items he presents, you could click on them, for our purposes, Click on Cancel.
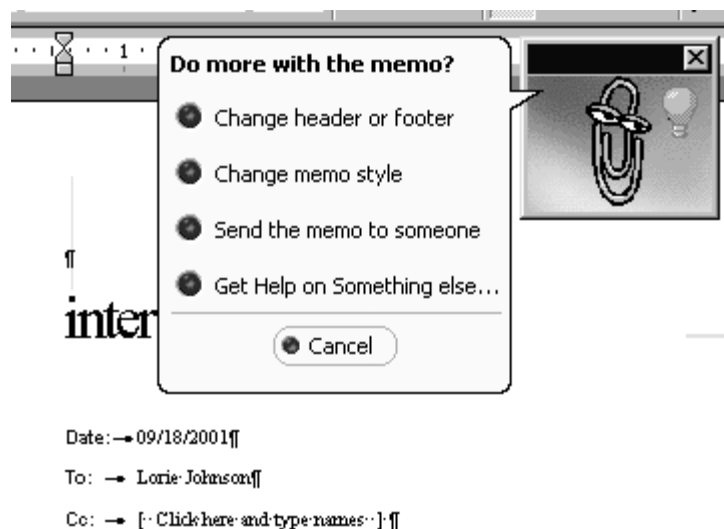
16. We want to fix up this document. Scroll down in the document using the scroll bar along the side, until your screen can see this portion of your text:

We did not **CC** anyone, so we want to delete this text →

This is where the actual memo will be typed. →

Date: → 09/18/2001¶

To: → Lorie·Johnson¶

Cc: → [··Click·here·and·type·names··]·¶

From: → Dianne·Berlenbach¶

RE: → Investing¶

_____

[··Click·here·and·type·your·memo·text··]·¶

¶
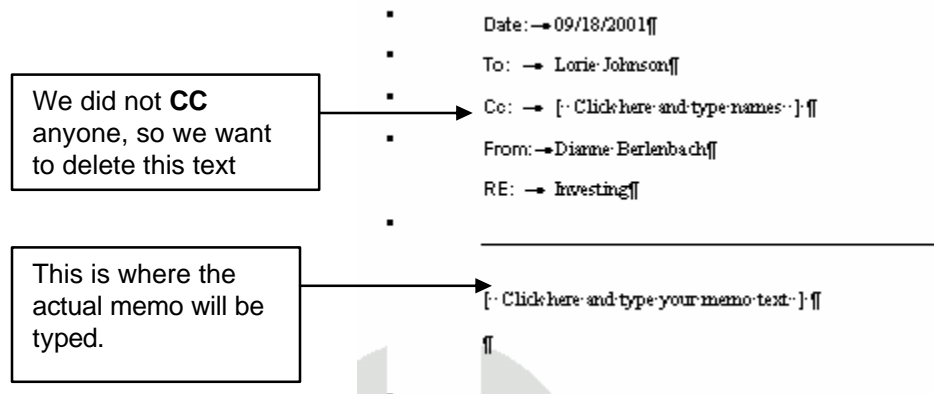
17. First, we want to delete the CC item. CC means Carbon Copy. If you were sending one person a memo and a "copy" to someone, it is called a CC.

Click in the area where it says [Click here and type name].

Press the Delete key on your keyboard.

18. Now, we want to type in our memo.

Click in the area where it says [Click here and type your memo text].

It will become highlighted. You can begin to type. Type in the following text:

We are pleased to advise our staff that we have put into place a new investment policy. Anyone who wishes to purchase shares in our company can fill in the forms and an automatic pay deduction will begin as soon as the next pay.

This allows our employees to take advantage of our excellent return on investment AND become a shareholder in the company. Please take the time to fill in the forms, which will appear in your mailbox.

19. Print this memo.

 Using Excel's Templates to create an Invoice

Excel comes with a few pre-designed templates for your convenience. These are in essence "forms". We will open one and fill it in. We will then save it and print it.

You should have Excel open

1.   Click on File

2.   Click on New

3.   Click on the Spreadsheet Solutions Tab.
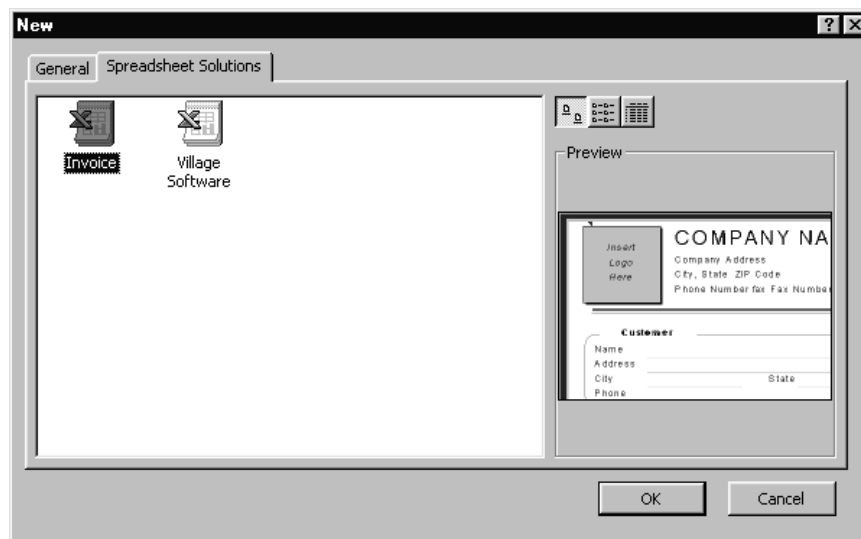
4.   Click on the Invoice Icon

5.   Click on OK.   A dialog box warning you about Macros containing viruses will appear. Simply click on Enable Macros.
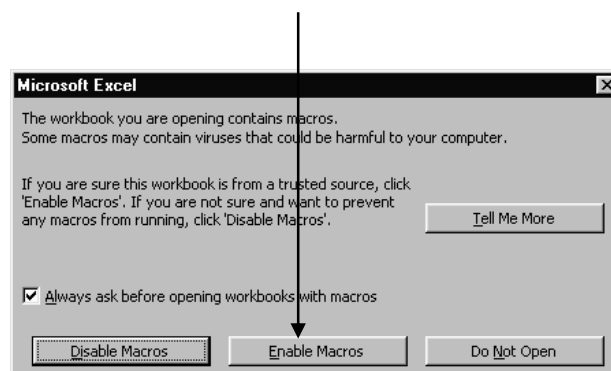
6.   An invoice will appear on your screen.

Some Tips

The Invoice form tracks invoices you send to customers. Before you fill out the Invoice sheet, fill out your company's name, address, tax information, and shipping charges on the Customize Your Invoice sheet. .

Click on this tab to Customize Your Invoice sheet.

To get back to the invoice, click on the Invoice Tab.
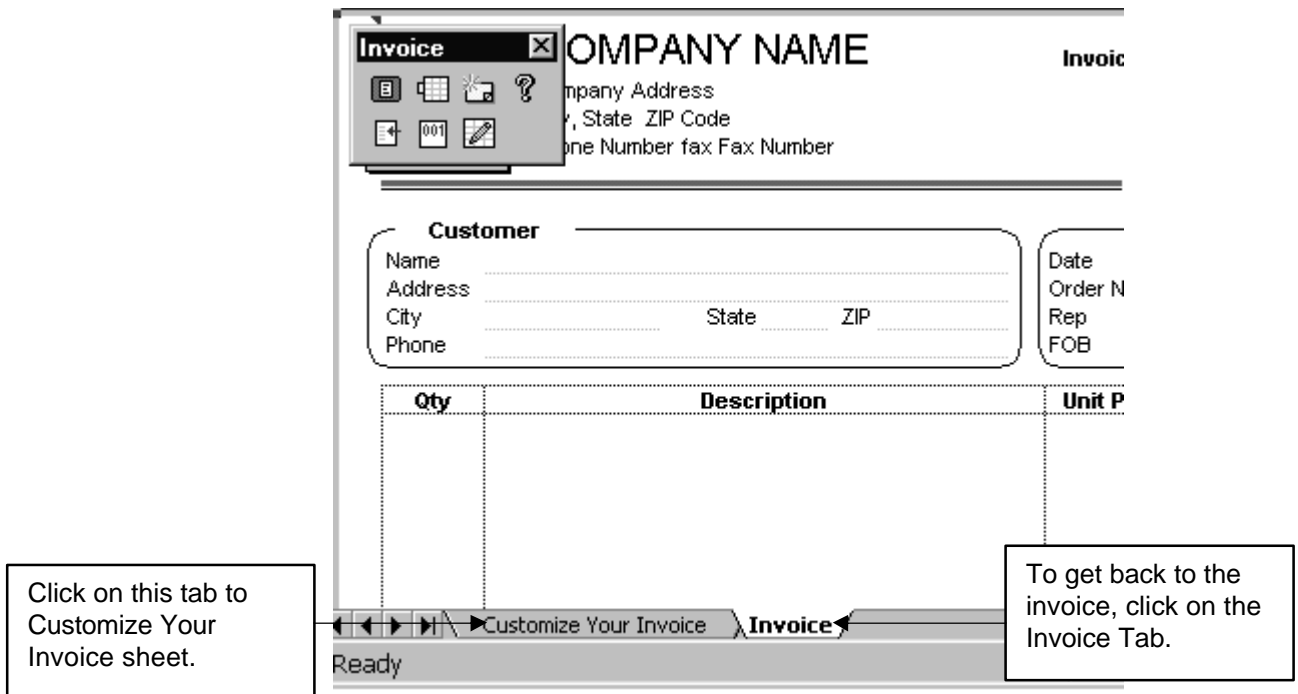
- On the Invoice sheet, fill out customer information, the products or services being invoiced, and payment details.

- To assign your own number, type the number in the cell to the right of Invoice No.

- For more information about filling out the form, rest the pointer over the cells with small red triangles.

- To print a form, click the Print button on the Standard toolbar. The correct print range is set automatically.

7.   To fill out the Company name. Click on the **Customize Your Invoice** sheet.

You can click in the Name and type in *Your Name's Computer Store.*

Click in the fields for Phone Number, address, and city.

For the province and postal code, you need to click in the "grey" area to change the word State to Province and Zip Cod to Postal Code. You can also click on the "grey" area which says Fax and delete it. Then you can type in the information to resemble the example:

Dianne's Computer Store   Invoice No.
Brealey Drive
Peterborough, Ontario K9H 2Z2   Customize...
749-5530

═══════════════════════════ **INVOICE** ═

8.   Click back onto the Invoice Tab, Note, once you fill in the Company Information tab, it will disappear. (Do not be concerned if you made a mistake, this is only a trial exercise!)

9.   Click in the Box to the right of the word Invoice. Type in 3456A.

10.   Click to the right of the word Name under Customer:

Customer
Name
Address
City   State   ZIP
Phone

11.   Type in the customer name: Jonathon Livingston

12.   Press Enter. This will place you at the Address. Type in: 123 Here

13.   Press Enter. This will place you at the City. Type in: Port Hope

14.   Press the TAB key on your keyboard. This will place you at the word State: Type in Province.

15.   Press the TAB key on your keyboard. Type in ON

16.   Press the TAB key on your keyboard. This will place you at the word Zip. Type in Postal.

17.   Press the TAB key on your keyboard. Type in K0K 1P0

18.   Press Enter. This will place you at the Phone number. Type in 613-987-6543

19.   Click under the word Quantity in the Invoice. Type in 6.

20.   Press TAB. Type in: Computer Module Books

21.   Press TAB. Type in 29.95

22.	Click under the 6 in the Quantity Column. Notice the price is calculated for you. Type in 2.

23.	Press Tab. Type in 101 Enhanced Keyboards.

24.	Press Tab. Type in 36.50

25.	Click under the 2 in the Quantity Column. Type in 3

26.	Press Tab. Type in Logitech Mouse

27.	Press Tab. Type in 17.85.

28.	Save this document, by clicking on File, Save As. You will be presented with Save As dialog box. In the SAVE IN area, choose your 3 ½" Floppy A: drive. (Be sure to have a disk in the Disk Drive.)

29.	In the filename area, call it My Invoice.

30.	Print this invoice!

Using The Internet to fill in a form to Set up Email

Many people choose to have an email account set up through "HotMail". There are a number of reasons, including the fact that you can access your mail from any computer anywhere as long as it has Internet access. We will use this as an example of filling in a form.

1. To begin with, Click on Start

2. Click on Netscape Navigator

3. In the location box (Netsite)

    type www.hotmail.com
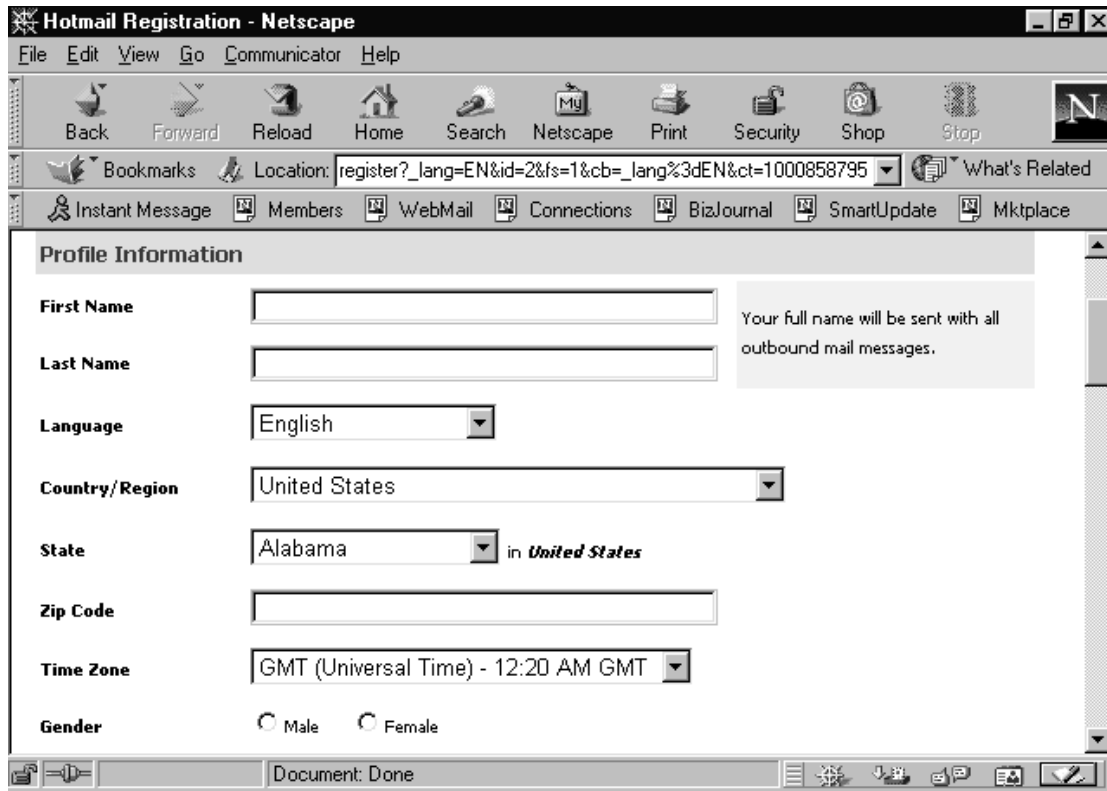
This will open the following location for you:
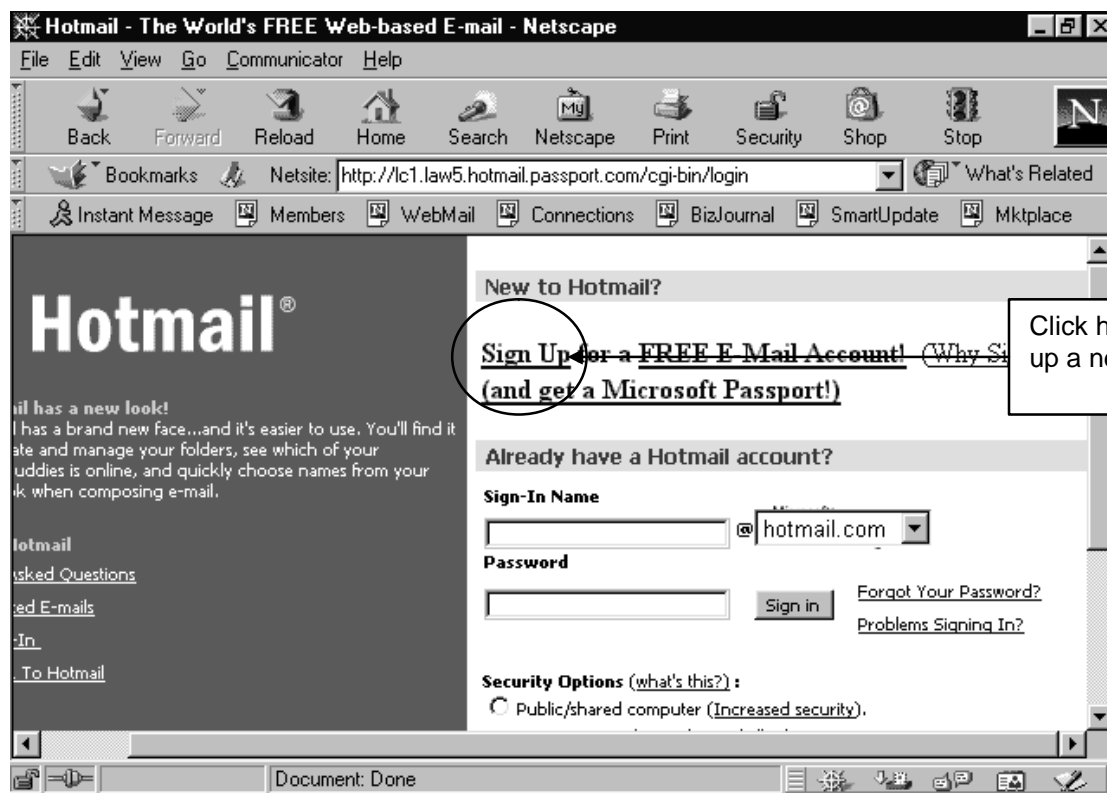
4. You will notice that there are two areas on the right side:
    New to Hotmail?
And
    Already have a Hotmail account?

We will be setting up a new account, but if you were going to check your mail, you would need to fill in the bottom area.

5. This will present you with the following screen. Since the "form" is larger than one screen you will have to scroll down, using the scroll bars on the right side of the window. Position your cursor in the box to the right of First Name.

6. Click in this box and type your first Name. If you would like to use an alias, that is fine, just be sure to write down the information so you do not forget.

7. Press the Tab key, and then type in your Last name

8. Press the Tab key to move to Language. We will assume you are using English. If you need another language, choose one, otherwise....

9. Press the Tab key to move to Country/Region, If you type a C... it will move you to the countries starting with C. You can then choose Canada from the list.

10. Fill in any other items on this first part of the screen. Then scroll down until you see the next illustration.

11. You now need to decide upon an email address. An example would be Student15@hotmail.com You do not type in the @hotmail.com

- You must follow the guidelines beside "Sign-In Name

- You need to also decide upon a password, then type it again in the line below, to confirm it.

- You also must decide upon a question that only you know the answer to. Then you need to fill in the answer.

12. Fill in the information and then scroll down go onto the next screen.

13. After you have typed in the answer to the Secret Question, take time to review the your answers and read the instructions along the side.
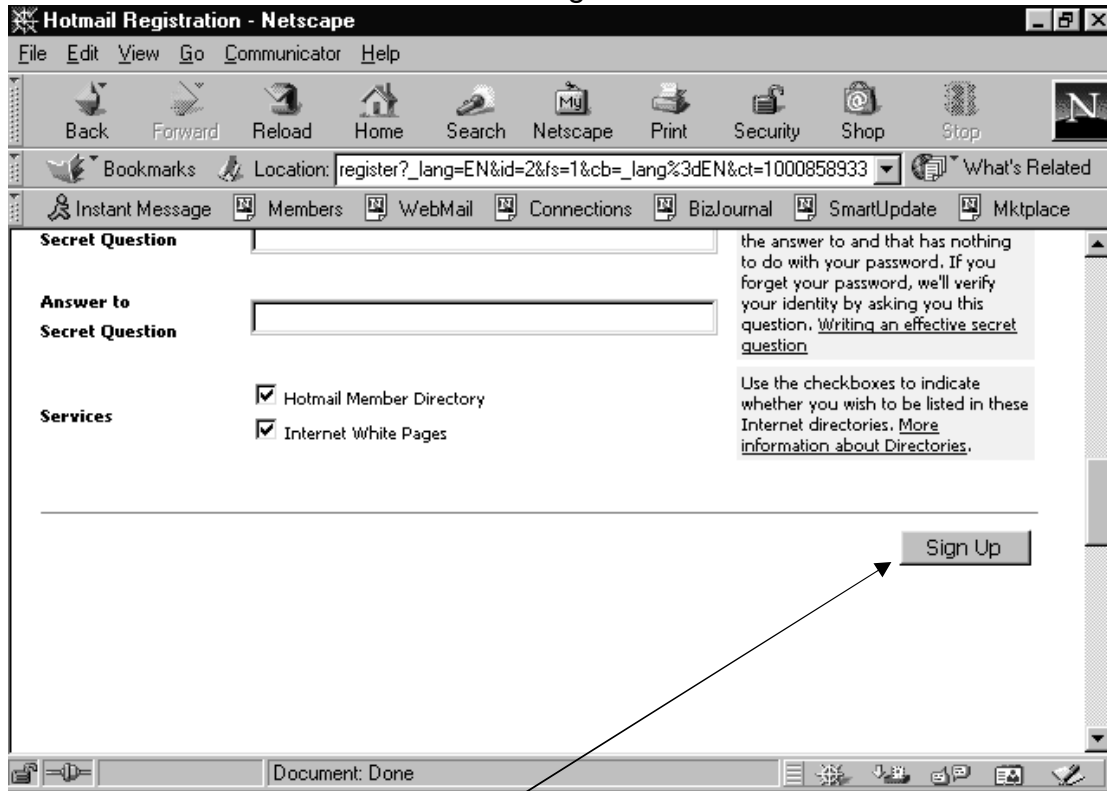
14. The last thing to do is Sign Up

 Time for you to try --Hands-on Exercise.

Using Word's Wizards, create a resume!
Save it
Print
Hand in a copy to your teacher.