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Have you ever needed to create a printable form in Excel, but weren't sure how to go about it? In this Excel tutorial, we will show you how to easily design a printable form using Excel's built-in features. Whether it's for business purposes such as order forms or feedback surveys, or for personal use such as expense trackers or to-do lists, being able to create printable forms in Excel can be a valuable skill to have.

**Key Takeaways**

Creating printable forms in Excel can be valuable for both business and personal use. Understanding the difference between regular worksheets and forms is essential for efficient data entry and analysis. Organizing the form layout and optimizing it for printing is crucial for a user-friendly experience. Adding form controls and data validation helps ensure accurate and reliable data entry. Testing and refining the form is important to identify and troubleshoot any issues before printing. Understanding Excel worksheets and forms

When working with Excel, it's important to understand the difference between a regular worksheet and a form. A. Explain the difference between a regular worksheet and a form in Excel

Regular worksheet: A regular worksheet in Excel is a grid of cells where users can input and manipulate data. It is commonly used for calculations, data analysis, and creating charts and graphs.

Form: A form in Excel is a structured layout designed for data entry. It typically includes labeled fields where users can input information in a standardized format.

B. Discuss the benefits of using forms for data entry and analysis

Forms provide a clear and organized layout for data entry, reducing the risk of errors and improving data accuracy. They can be customized to include dropdown lists, checkboxes, and other interactive elements, making data entry more efficient.

Forms can streamline the process of collecting and analyzing data, making it easier to identify patterns and trends.

C. Provide an overview of the different types of forms that can be created in Excel

Data entry forms: These forms are designed for inputting information into a database or spreadsheet. They include fields for various types of data, such as text, numbers, dates, and more.

Survey forms: These forms are used to collect responses from individuals. They may include multiple-choice questions, rating scales, and open-ended fields for comments.

Order forms: These forms are commonly used for e-commerce or sales transactions. They include fields for item selection, quantities, pricing, and shipping information.

Setting up the form layout

Creating a printable form in Excel requires careful attention to the layout and organization of the form fields and labels. Here's how to set up the form layout and optimize it for printing:

A. Demonstrate how to organize the form fields and labels in Excel

When designing a printable form in Excel, it's important to consider the placement of form fields and labels. Use cell merging to create larger fields for data entry, and align the labels with the corresponding fields to create a clean and organized look.

For example, if you have a form with fields for name, address, and contact information, you can merge multiple cells to create a single, wide field for each category and align the labels with the fields for a clear and visually appealing layout.

B. Discuss the importance of a clear and user-friendly layout for the form

A well-organized form layout is crucial for a user-friendly experience. A clear and intuitive layout makes it easier for users to understand the form and fill it out accurately. It also improves the overall professionalism and aesthetic appeal of the form.

By organizing the form fields and labels in a logical manner, you can guide the user through the form and make it more accessible and user-friendly.

C. Provide tips for optimizing the form layout for printing

1. Use print preview

Before finalizing the form layout, utilize the print preview feature in Excel to ensure that the form looks as intended when printed. This allows you to make any necessary adjustments to the layout, such as resizing fields or adjusting margins, to optimize the form for printing.

2. Consider the paper size

Take into account the paper size on which the form will be printed. Ensure that the form layout is compatible with standard paper sizes, such as letter or A4, to avoid any issues with printing or formatting.

3. Adjust margins and page layout

Adjust the margins and page layout settings in Excel to optimize the form for printing. This includes setting the page orientation (portrait or landscape) and adjusting the margins to ensure that the form fits well on the printed page.

Adding form controls and data validation

Creating a printable form in Excel involves adding form controls and implementing data validation to ensure accurate data entry. Let's look at how to insert form controls such as text boxes, checkboxes, and drop-down lists, and discuss the use of data validation.

Explain how to insert form controls such as text boxes, checkboxes, and drop-down lists

Form controls are essential for creating an interactive and user-friendly form in Excel. To insert a form control, go to the Developer tab and click on the Insert option. From the Form Controls section, choose the desired control, such as a text box for entering text, a checkbox for marking options, or a drop-down list for selecting from predefined options. Once inserted, you can resize and customize these controls to fit your form's layout.

Discuss the use of data validation to ensure accurate data entry in the form

Data validation is a critical aspect of creating a printable form in Excel. It helps in maintaining data accuracy by restricting the type of data that can be entered into a cell. To apply data validation, select the cells where you want to impose restrictions, go to the Data tab, and click on Data Validation. You can set criteria such as whole numbers, decimals, dates, or create custom rules to ensure that only valid data is entered into the form.

Provide examples of common scenarios where form controls and data validation are essential

Form controls and data validation are essential in various scenarios:

Employee information form: Using form controls such as text boxes for name and address, checkboxes for gender, and data validation for date of birth to ensure accurate and consistent data entry.

Survey or feedback form: Incorporating drop-down lists for rating scales, checkboxes for multiple-choice questions, and data validation to ensure valid responses.

Order or requisition form: Utilizing form controls for product selection, quantity input, and data validation for ensuring the correct format of order details.

Formatting the printable form

When creating a printable form in Excel, it's important to consider how the form will look when printed. Proper formatting is essential to ensure the form is professional and easy to read.

A. Best practices for formatting the form for printing

Keep the layout simple and easy to understand

Use clear and legible fonts

Avoid using bright or distracting colors

Ensure there is enough white space for the form to be easily completed

B. Tips for adjusting print settings

Set the page orientation to match the form layout (landscape or portrait)

Adjust the margins to provide a consistent border around the form

Consider scaling the printout to fit the form on a single page

Preview the print settings to ensure the form looks professional and is easy to read

C. Adding headers, footers, and page breaks

Including headers and footers can add a professional touch to the printable form. Headers can display the form title or a company logo, while footers can include page numbers or important notes. Page breaks can be added to ensure that each form entry starts on a new page, making it easier to read and complete.

Testing and refining the form

Creating a printable form in Excel is a detailed process that requires thorough testing and refining to ensure the form meets the intended purposes. In this chapter, we will discuss the importance of testing the form, refining based on user feedback, and troubleshooting common issues that may arise.

A. Explain the importance of testing the form before printing

Before printing the form, it is crucial to test it thoroughly to identify any potential issues. Testing allows you to catch any errors or inconsistencies that may affect the form's functionality or appearance. It also ensures that the form meets the requirements and objectives set during the design phase. Additionally, testing helps in identifying any user experience issues that may need to be addressed before finalizing the form for printing.

B. Discuss the process of refining the form based on user feedback and testing results

Refining the form based on user feedback and testing results is an essential step in creating a printable form in Excel. User feedback provides valuable insights into the usability and effectiveness of the form, allowing you to make necessary adjustments to improve the overall experience. Additionally, testing results may reveal technical or design flaws that need to be addressed to ensure the form's functionality and appearance are optimal for printing.

1. User feedback

Encourage users to test the form and provide feedback on their experience. Consider any suggestions for improvements or additional features.

Make necessary adjustments based on user feedback to enhance the form's usability.

2. Testing results

Review testing results to identify any technical or design issues. Address any errors or inconsistencies that may affect the form's functionality or appearance.

Refine the form based on testing results to ensure it meets the intended purposes.

C. Provide troubleshooting tips for common issues that may arise when creating a printable form in Excel

During the creation of a printable form in Excel, you may encounter common issues that can affect the form's usability or appearance. It is important to be aware of these potential issues and have troubleshooting tips to address them effectively.

1. Alignment and formatting issues

Check for any misaligned or improperly formatted elements on the form.

Adjust cell sizes, borders, and text formatting to ensure a consistent and professional appearance.

2. Printing discrepancies

Ensure that the form prints as intended without cutting off content or distorting the layout.

Adjust print settings, such as page layout and scaling, to optimize the form for printing.

By following these troubleshooting tips, you can address common issues that may arise when creating a printable form in Excel, ensuring that the final form is well-designed and functional for printing.

Conclusion

In conclusion, we have discussed the steps to create a printable form in Excel. Starting from designing the form and adding input fields to setting print area and adjusting page layout, we have covered all the essential aspects. I encourage you to practice creating printable forms in Excel to enhance your proficiency in using this powerful tool. Additionally, you can explore further learning on Excel forms and worksheets through resources like Microsoft's official support page, online tutorials, and Excel forums. Here's an overview of how you can use a fillable form in Excel.

How to Make a Fillable Data Entry Form in Excel: 5 Easy Examples

Example 1 - Making an Excel Fillable Form for Employee Information

Steps: Make a rough template like the following picture. This doesn't contain any formula or code. The dataset contains some Check Boxes. To insert them, go to Developer, choose Insert, and select Check Box from Form Control. Put them in the name column same as the above picture. Make a list for the Employee Status. To create the list, go to Data and select Data Validation. Select List from the Allow: section and type the Statuses in the Source field. Click OK. Create another list for the Year of Birth. We used a named range for the year from Sheet2. We created a Data Validation list for the Service Duration of the employees. Use the following formula in cell B7 and press Enter. The named ranges are from Sheet2. =IF(B4="Part-Time",Part\_Timer,IF(B4="Full-Time",Full\_Timer,IF(B4="Contractual",Contractual,"")))

This formula uses the IF Function and will return the names of employees based on their status. If no status is selected, it will return nothing. Use the following formula in cell C7. =IF(B4="Part-Time",Residence\_1,IF(B4="Full-Time",Residence\_2,IF(B4="Contractual",Residence\_3,"")))

This formula will also return the residences of selected employees based on their status. This formula also has named ranges Residence\_1, Residence\_2 and Residence\_3 from Sheet2. Make a list for the supervisor's name. The Source reference can be found in Sheet2. Use the following formula in cell C15. =IF(C14="", "", VLOOKUP(C14,Table1,2,FALSE))

The formula uses the IF and VLOOKUP Functions and will return the Designation of the supervisor based on a name. You can find their name in a table of Sheet2. Use this formula in cell C16 and press ENTER. =IF(C14="", "", VLOOKUP(C14,Table1,3,FALSE))

This will return the Department of your supervisor based on his name. Your fillable form is set. If you want to put more data, you can use a similar formula or named ranges or a Data Validation list. Here's an image of named ranges in Sheet2. The Year column has more data below and contains all years. Insert a status from the Data Validation list. You will see the names of your fellow employees based on their statuses. Select a year of birth and put a tick in the Check Box beside the name. The residence will be automatically updated. Fill the other fields manually. Read More: How to Create Data Entry Form with Drop Down List in Excel

Example 2 - Creating a Fillable Data Entry Form in Excel

Steps: Insert some headings like in the following picture. Select the Heading row and convert it to a table. Select Customized Ribbons and choose Insert (You can choose any other tab too). Go to New Group and select Rename... Name the group, such as Insert Form. Click OK. Select Commands Not in the Ribbon from the Choose Command from section. Select Form and Add it to the Insert Form group that you created. Click OK. Select the header row and go to Insert and select Form. A dialog box will show up. Put the employee data in it and click on New. By doing this, you add this employee data into the table. Enter another data point and click New. This data also appears in the table. Thus you can make a fillable data entry file in Excel.

Example 3 - Making a Fillable Form from Available Templates in Excel

Steps: Go to New and type form in the Search Bar. Press Enter to search and you will find a lot of templates. Select a template you like. We selected Small business profit and loss statement. You can use the template after it's been downloaded.

Example 4 - Use Microsoft OneDrive to Make a Fillable Form

Steps: Go to your OneDrive account and select New, then choose Forms for Excel Add a section by clicking Add new. You will see some form options. We want to insert names first so we selected Text. Type Name as the number one option. Put other options. We want a Gender section so we chose Choice, where anyone can put their gender in the form. However, in Excel, we may not see the form in the same way. We added some other sections. You will see how the Fillable Form will look like to the user. Go to your Excel file and select the File. Select Open, choose OneDrive, and select Fillable Form. You will see the fillable options appear in the Excel workbook as a table. There were some unnecessary columns in the table. We hid and deleted them for convenience. Put some data in the table.

Example 5 - Using Microsoft Office Account Apps to Make a Fillable Form

Steps: Go to your Office account and search for forms in the Search Bar. Select Forms. Click on the Untitled form. The remaining process is the same as in the Previous Section. Practice Section

We've provided some forms that you can test out. Download the Free Templates Making Fillable Form.xlsx

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