

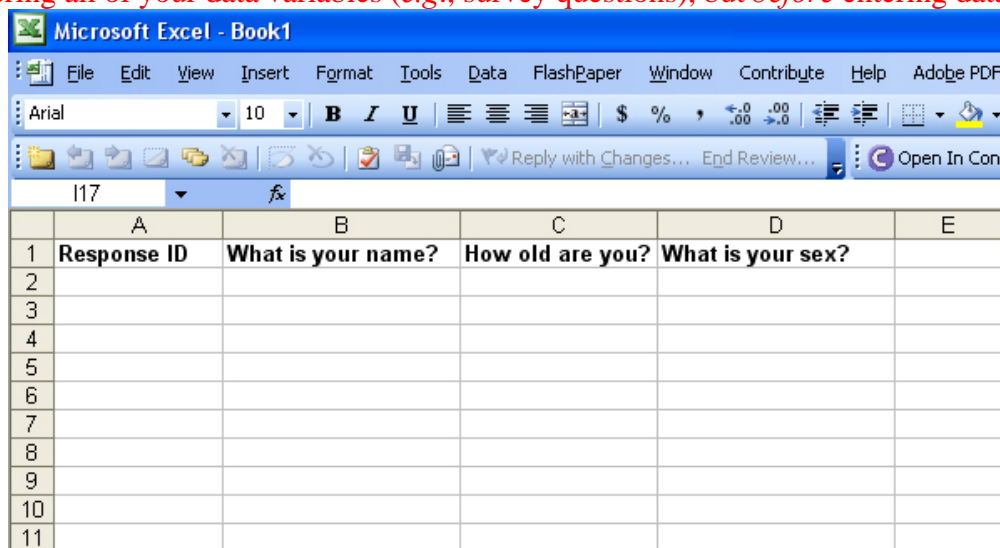


## Instructions for creating a data entry form in Microsoft® Excel®

You have several options when you want to enter data manually in Excel®. You can enter data in one cell, in several cells at the same time, or on more than one worksheet (worksheet/spreadsheet: The primary document that you use in Excel to store and work with data.) at once. The data that you enter can be numbers, text, dates, or times. You can format the data in a variety of ways and you can apply parameters to the data that is entered by applying validations to cells or fields. (*see data validation tutorial for more information*). If you have a lot of data you need to enter in a dataset you might want to use the “data form” option in Excel to make data entry easier for you. A “data form” provides a convenient means to enter or display one complete row of information in a range or table without having to scroll horizontally. You may find that using a data form can make data entry easier than moving from column to column when you have more columns of data than can be viewed on the screen. Microsoft Excel can automatically generate a built-in data form for you. The steps for creating and using a data entry form are listed below.

- 1) Before you can use or create a data entry form in Microsoft® Excel®, you must have data variables at the top of each column. Microsoft® Excel® uses these data variables to create fields on the data entry form (*see picture associated with step #5*).

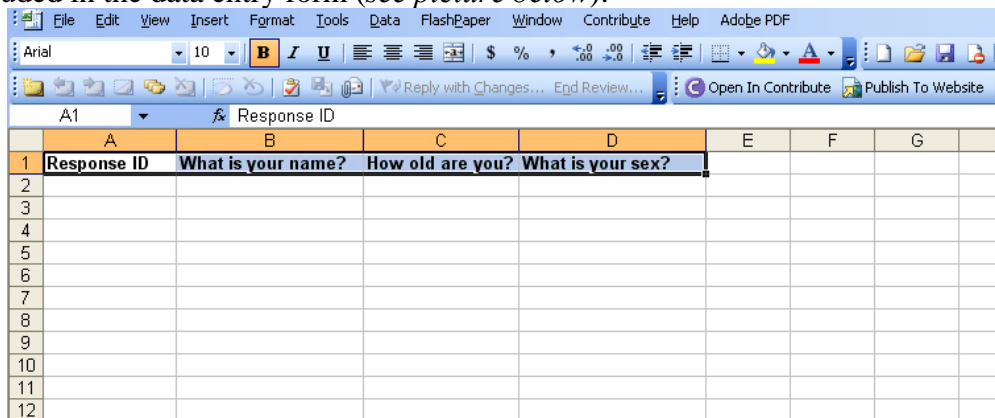
For example, if you are entering survey responses it is best to make the data variables the survey questions (*see picture below*). **Remember if you want your dataset to have validation for specific data variables, you will need to complete all of the steps listed in the data validation instructions after entering all of your data variables (e.g., survey questions), but before entering data.**



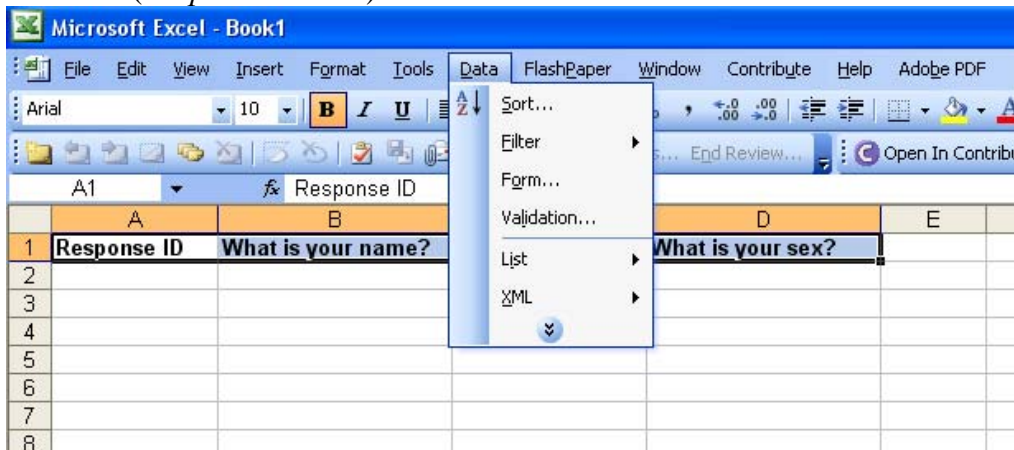
The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E
1	<b>Response ID</b>	<b>What is your name?</b>	<b>How old are you?</b>	<b>What is your sex?</b>	
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					

- 2) After you have added your data variables (or survey questions) to the Excel® document, you can create a data entry form. To do so, first with your cursor, select the range of data variables you want to be included in the data entry form (*see picture below*).

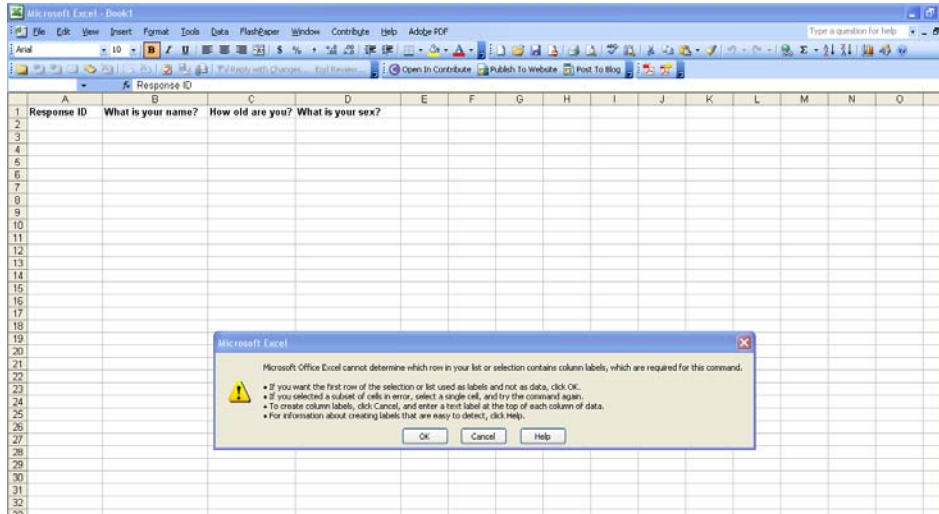


- 3) After selecting the range with your cursor, click on “Data” on the tool bar and select “Form...” from the drop-down list (*see picture below*).



*Note: If you do not see “Form...” in the drop-down list, it means you will have to expand the list by clicking on the  at the bottom of the drop-down list.*

4) After clicking on “Form...” you will get a message box similar to the one shown below from Microsoft® Excel®.

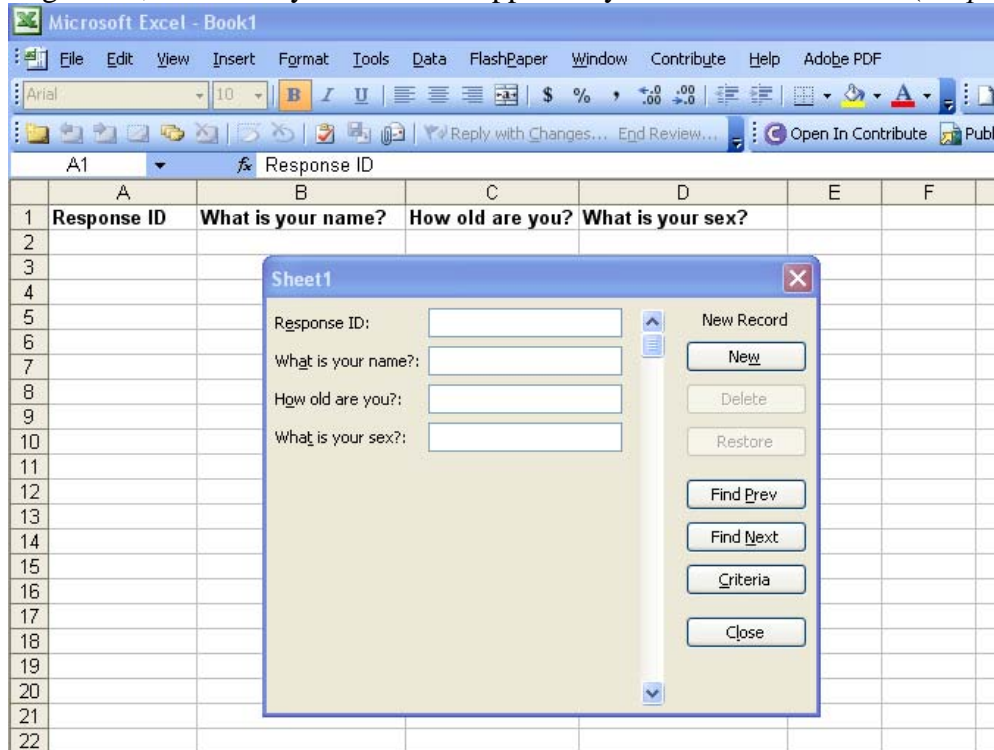


Here is a zoom of the message (see picture below).



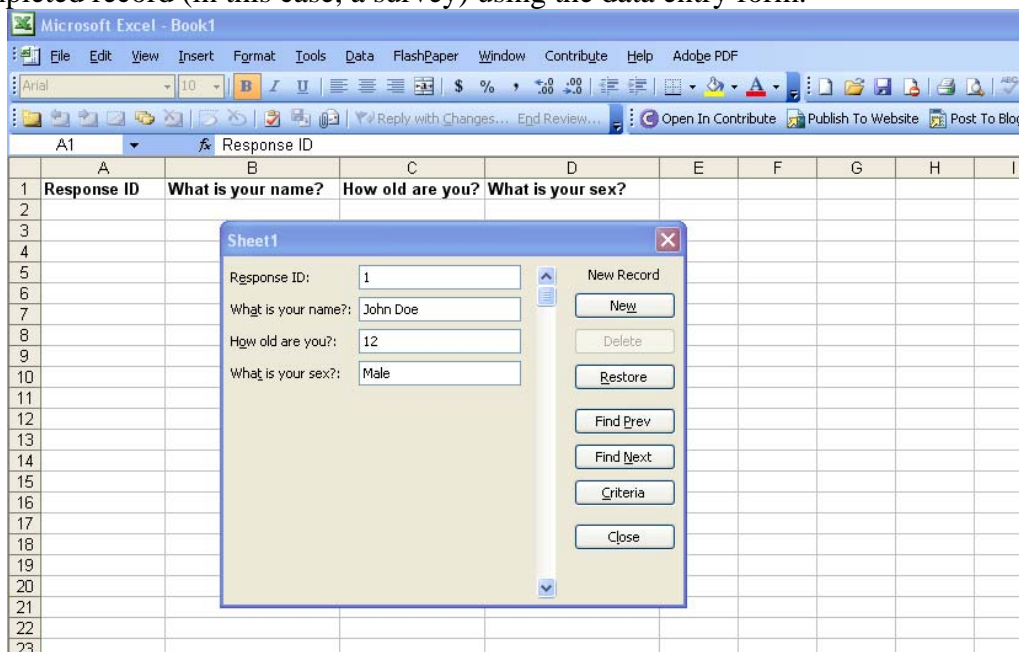
If you have correctly selected all of the data variables you want and the data variables are on the first row of the area you selected, then click the “OK” button on the message.

5) After clicking “OK”, a data entry form should appear in your Excel® document (see picture below).



As you can see in the picture above, each data variable is a separate data entry field. By using the survey questions, it makes the data entry process easier to follow for whoever is entering the data.

6) You can initiate the data entry by clicking in the data entry field where you want to start. In this case, you would click in the box located to the right of “Response ID:” and start typing. Below is a picture of a completed record (in this case, a survey) using the data entry form:



There are 3 ways to move to each data entry field.


1. Place your cursor in the field where you want to start data entry and left-click your mouse.
2. Use the “Enter” key on your keyboard when you have finished a data entry field.
3. Use the “Tab” key on your keyboard when you have finished a data entry field.


***NOTE:** The up (↑) and down (↓) arrow keys on your keyboard will navigate to the **next record** in the data set, **NOT** the next data entry field. For example, if you were in the Response ID field of the first record and hit the down (↓) arrow key once, you would then move to the next record in your dataset. If you hit the down (↓) arrow key twice while in the Response ID 1 record, you would then move to Response ID 3 record and so forth.*

You can use any of the 3 ways described above to complete your data entry.

You may also notice some buttons on the right side of the data entry form:

- The “New” button is for starting a new record.
- After entering several records, a button called “Clear” will become available. This button is used for deleting a record.
- The “Restore” button is for restoring a record you might have accidentally deleted. This button cannot be used if you have moved on to another record or closed and saved the file after deleting the record.
- The “Find Prev” button will go to the previous record in the dataset.
- The “Find Next” button will go to the next record in the dataset.
- The “Close” button will close the data entry form.

 **You will need to close the data entry form BEFORE you are able to save the data you have entered. Each time you open the dataset for data entry, you will have to recreate a data entry form, following steps 1-6.**

 **You can use the data entry form for data sets that already have validations. However, error messages will not appear until a record has been completed in the data entry form and the person doing the data entry moves on to the next record.**