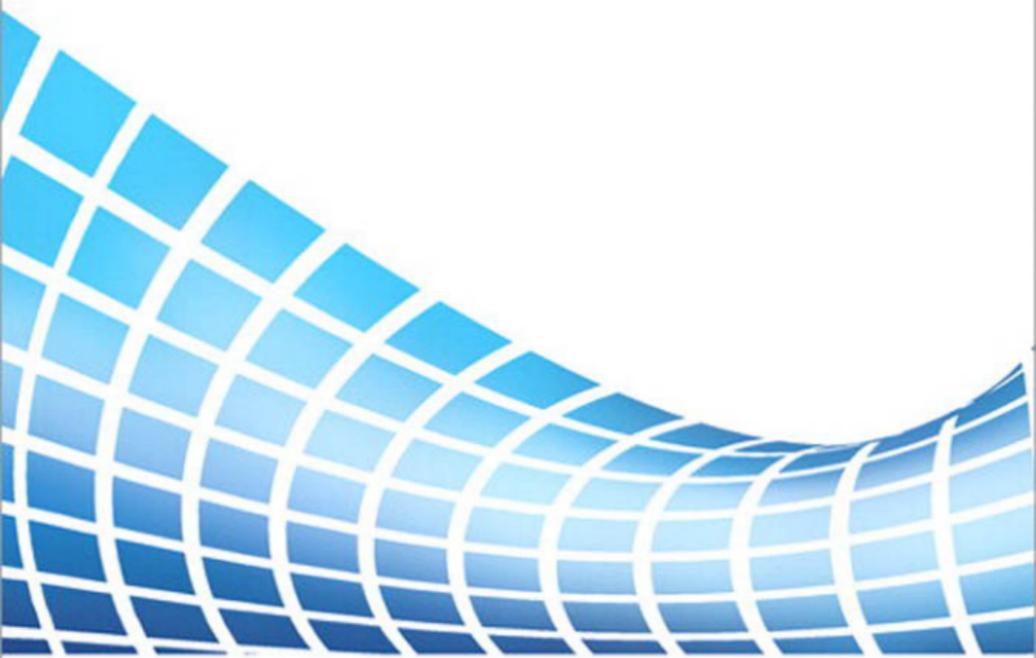


Microsoft®

Word 2010



IN DEPTH

que

Faithe Wempen

MICROSOFT® WORD 2010 IN DEPTH

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Introduction

Welcome to *Microsoft Word 2010 In Depth*! This book is designed to be your one-stop reference for *Microsoft Word 2010*, from the basics of Ribbon usage to the intricacies of forms, fields, and customization tools. Whether you're just getting started, are upgrading, or are already a Word whiz, this book can help you move up to the next level in expertise.

How This Book Is Organized

Microsoft Word 2010 In Depth is organized into these parts.

Part I: Working with Text

This part explains how to create a basic document by typing and editing text, saving in various formats, correcting your mistakes, and printing your work. These basic skills will pave the way to more extensive editing later in the book.

Part II: Formatting a Document

In this part, you'll learn how to format documents on several levels: character, paragraph, and document-wide. You'll discover how to automate formatting with styles and themes; how to set up sections that enable different margin, column, and header/footer information in different parts of a document; and how to use and create project templates that streamline the process of formatting documents that you frequently re-create. You'll also learn how to create some nonstandard documents, such as banners, envelopes, and greeting cards.

Part III: Tables and Graphics

This part explains how to create and format data in tabular format and how to insert and format a variety of special-purpose graphical elements

including clip art, drawings, charts, SmartArt, and mathematical equations. Most of these graphics types have formatting controls in common, so after you've learned how to format one type of object, the other types become much easier.

Part IV: Collecting and Managing Data

In this part, you'll learn how to use Word to collect data and to use data to automate tasks. You'll see how to mail-merge labels, letters, envelopes, and catalogs and how to use fields and data entry forms to display and collect information.

Part V: Working with Long Documents

This part covers the many tools Word provides for managing lengthy manuscripts, such as research papers and books. You'll learn how to outline and summarize documents, how to create master documents that combine several files into a single unit, and how to generate tables of contents and other listings. This part also includes information about the new citation management features in Word 2010 and explains how to create effective indexes.

Part VI: Collaboration and Online Sharing

In this part, you'll learn about the tools that Word 2010 provides for sharing your work with others, both while it is in the development stages and when it is finalized. You'll find out how to collaborate on documents with a team, how to protect and secure your files, and how to use Office Live and SharePoint Team Services. This part also covers developing online content via Word and generating XML content.

Part VII: Customizing and Extending Word

This part explains how you can make Word easier to use by adding features such as macros and add-ins and by customizing the Word interface.

Part VIII: Appendixes

The appendixes for this book provide an assortment of reference guides, including help for recovering and repairing problems, converting from other word processing systems, and setting up and modifying Office 2010.

Conventions Used in This Book

Here's a quick look at a few structural features designed to help you get the most out of this book. To begin with, you'll find Tips, Notes, and Cautions.



Tips are designed to point out especially quick ways to get the job done, good ideas, or techniques you might not discover on your own.



Troubleshooting Tips

Troubleshooting boxes provide advice for getting back to normal when things go wrong.

Often, when a subject is covered in greater detail, you'll find a marker like this, which points you to the location where the topic can be found:

➡ *For more information about Word's automated spelling and grammar checker, see "Performing an Interactive Spelling and Grammar Check," p. 98.*

Que's *In Depth* conventions are designed to be completely predictable. It's easy to understand what you're reading and what you're supposed to do.

For example, whenever you should press multiple keys together, in this book they are written separated by a plus sign, like this: Ctrl+B. That means hold down the Ctrl key, press the B key, and then release both keys.

Terms introduced and defined for the first time are formatted in italic.

Text that you are supposed to type is formatted in bold type, as in the following example:

Run Setup using a command such as **setup.exe /q1 /b1**.

That's all you need to know to get the most out of this book. Now fire up your copy of Word 2010 and let's have a go at it.

note

Notes offer even more insight into features or issues that may be of special interest, without distracting you from the meat-and-potatoes answers you're looking for.

caution

As you'd expect, cautions warn you about potential pitfalls and problems and point out fixes for common issues.

WORKING WITH FIELDS AND FORMS

Understanding Fields

Fields are the often-underappreciated placeholders that work behind the scenes in a document. They help perform the magic involved with many of the most powerful features in Word, such as mail merging, indexing, automatic generation of tables of contents, automatic figure numbering, cross-referencing, page numbering, and more.

There are many different types of fields, each with a specific purpose, but they break down into three main categories. You can use fields to do the following:

- Insert text or graphics into the document, such as page numbering, dates and times, text from other documents, graphics from external files, document properties, or calculated values.
- Mark a location for later use, such as with a bookmark, table of contents marker, or indexing code.
- Perform an action, such as running a macro or opening a hyperlink in a web browser.

Many people use fields in Word without even realizing it because so many of Word's features automatically insert and modify fields. For example, when you insert a date or time and set it to be automatically updated, Word inserts a {Date} or {Time} code. And when you create an OLE link to an object, Word inserts a {Link} code.

Throughout this book, you've been learning about fields in an indirect way. Whenever a feature has been discussed that used a field, you've learned to insert that field via a button or dialog box, but you haven't looked too deeply yet at what's really going on behind the curtain. Table 16.1 lists some of the Word features that employ fields and cross-references them to where those skills are covered in the book.

Table 16.1 Word Features That Use Fields

Field	Purpose	Covered in
{AutoText}	Inserts an AutoText entry	"Working with Building Blocks," p. 89
{Bookmark}	Creates a bookmark marker	"Working with Bookmarks," p. 593
{Date}	Inserts an automatically updated date	"Inserting a Date or Time Code," p. 271
{Hyperlink}	Inserts a hyperlink	"Working with Hyperlinks," p. 586
{IncludePicture}	Inserts a non-OLE linked picture from an external file	"Inserting a Picture with {IncludePicture}," p. 612
{IncludeText}	Inserts non-OLE linked text from an external file	"Inserting Text with {IncludeText}," p. 609
{Index}	Generates an index	"Generating the Index," p. 749
{Link}	Inserts an OLE-linked object	"Creating a Link," p. 605
{NoteRef}	Inserts the number for a footnote	"Working with Footnotes and Endnotes," p. 708
{Page}	Inserts an automatically updated page number	"Adding and Formatting a Page-Numbering Code," p. 269
{PageRef}	Inserts the number of the page containing the specified bookmark	"Inserting a Cross-Reference to a Bookmark," p. 598
{Ref}	Inserts the text marked by a bookmark	"Inserting a Cross-Reference to a Bookmark," p. 598
{Seq}	Inserts an automatically numbered caption	"Using Figure Captions," p. 412
{Symbol}	Inserts a symbol from a specified font	"Inserting Symbols and Special Characters," p. 54
{Time}	Inserts an automatically updated time	"Inserting a Date or Time Code," p. 271
{TA}	Marks a table of authorities entry	"Creating Citations and Tables of Authorities," p. 737
{TC}	Marks a table of contents entry	"Creating a Table of Contents," p. 723
{TOA}	Inserts a table of authorities	"Creating Citations and Tables of Authorities," p. 737

Table 16.1 Continued

Field	Purpose	Covered in
{ TOC }	Inserts a table of contents	“Creating a Table of Contents,” p. 723
{ XE }	Inserts a marker for an index entry	“Marking Index Entries,” p. 741
{ = }	Inserts a formula or calculated field	“Performing Math Calculations in a Table,” p. 369

This chapter delves into the technical nitty-gritty details that govern fields and shows you how you can select, insert, modify, and format fields to accomplish a variety of document-creation and formatting tasks. Even if you don't end up working manually with fields very often, this is not wasted study! The more you understand about how fields really work, the better you will be able to troubleshoot problems that may occur or to tweak an individual field's options to fit an unusual formatting need.

Inserting Fields

You can insert many fields via the regular Word user interface, as listed in Table 16.1. However, you can also insert a field using the Insert Field command, a more direct route that provides access to more of the field's optional switches and parameters.

To insert a field, follow these steps:

1. Position the insertion point where you want the field to be inserted.
2. On the Insert tab, click Quick Parts and then click Field. The Field dialog box opens.
3. (Optional) On the Categories list, select a category to narrow the list of field names.
4. On the Field Names list, click the desired field name. Lists and check boxes appear for the available options for that field. For example, in Figure 16.1, the options for the Date field are shown.
5. Select any options as needed, and then click OK.

Specifying Field Properties and Options

As you insert a field (as in the preceding section), the Field dialog box prompts you to select the properties and options you want. *Field properties* are settings from which you must make a selection (or accept the default). For example, in Figure 16.1, the date format is a property. If you do not choose one, Word uses a default property. *Field options* are optional parameters; to omit them, simply leave their check boxes blank.

If you are interested in the codes behind these user-friendly dialog box controls, click the Field Codes button to display the Field Codes text box. It shows the code that Word inserts for the properties and options you have selected so far (see Figure 16.2).

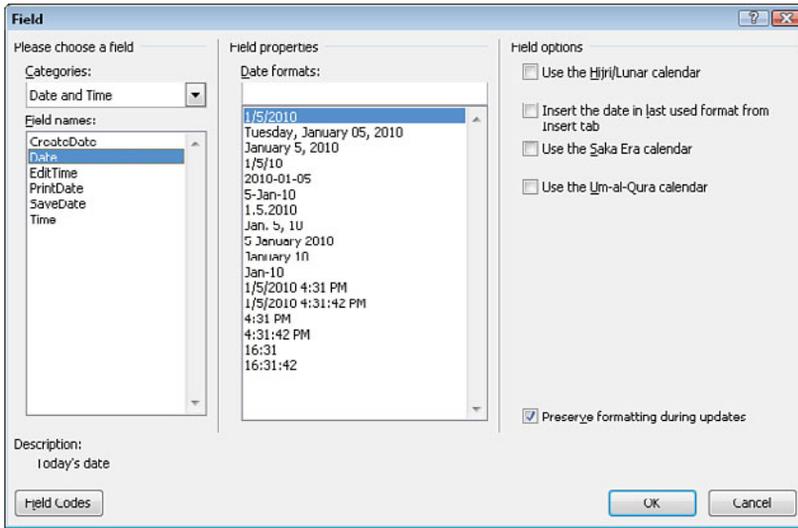


Figure 16.1
Insert a field from the Field dialog box.

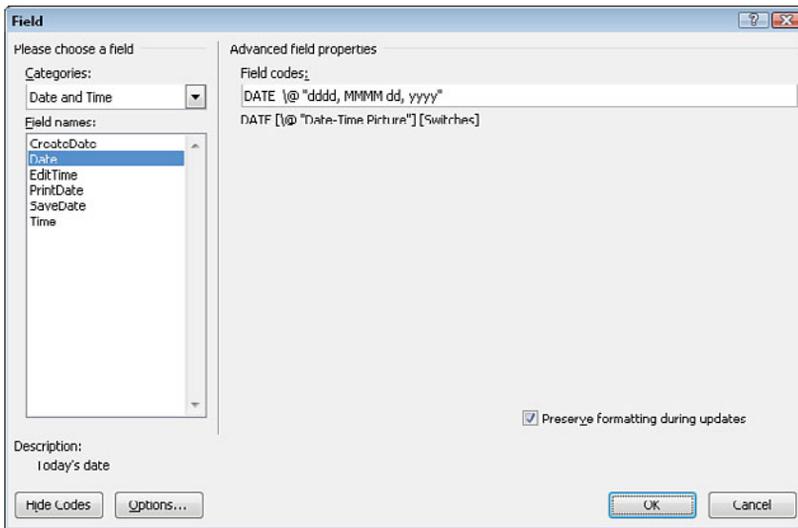


Figure 16.2
View the codes behind the properties and options you have selected.

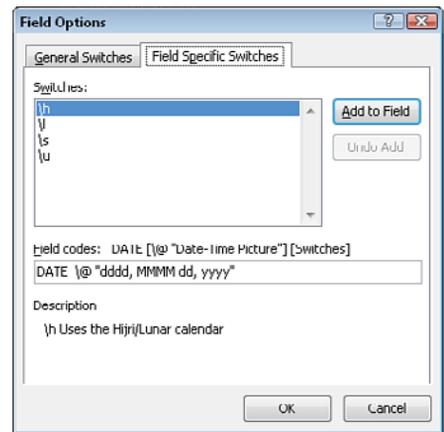
To delve even further into the field's coding, click the Options button to display the Field Options dialog box. Each available switch and option for the field is listed and described on the Field Specific Switches tab. To add one of them, select it and click Add to Field (see Figure 16.3).

note

The Field Options dialog box doesn't do anything that the check boxes and lists in the Field dialog box don't do, but the description of each option in the Description area of the Field Options dialog box can help you figure out what a particular option does.

Figure 16.3

Work directly with the field's optional switches and properties in the Field Options dialog box.



Manually Typing Field Codes

If you know exactly what you want in terms of field codes, you might find it easier and quicker to simply type them into your document.

Field codes are bracketed with curly braces, like this: {Date}. However, you can't manually type the curly braces, because Word won't recognize the code as a field. Instead, you must press Ctrl+F9 to get the ball rolling.

Ctrl+F9 inserts a blank set of curly braces in a shaded field box.

From there you can type the desired field name and any switches or other syntax needed. (If you don't know the exact syntax you need, it's better to go with the dialog box method of field insertion.)

Here are some tips for getting the syntax right:

- Field names are not case-sensitive.
- If a property or argument contains spaces, you must enclose it in quotation marks. For example, {Username "John Doe"} would be correct. {Username John} would also work because John does not have spaces in it, but {Username John Doe} would be incorrect.

tip

You can add a button to the Quick Access toolbar that starts a new blank set of field braces. Choose File, Options, and click Quick Access Toolbar. Select All Commands from the Choose Commands From list. Then select Insert Field Chars and click Add.

- If you need a real quotation mark, use “\”.
- If you’re specifying a path, use double backslashes rather than single—for example, {IncludeText C:\\Docs\\Myfile.doc}. This is necessary because single backslashes indicate switches and special codes.
- Leave one space between the field name and each property or switch.
- Leave one space between the backslash (\) in the switch and its parameters.
- Leave one blank space to the right of the left bracket and to the left of the right bracket.



Common Syntax Errors in Field Codes

When manually typing the code for a field, it is easy to make a mistake. Word fields have different syntax than you might be used to in Excel functions or VBA, for example.

Here are some of the most commonly broken syntax rules. If you’re having a problem with a field code, check to make sure you are following all these rules:

- Spaces are required between the outer braces and the codes inside them:
 - Right: { Date }
 - Wrong: {Date}
- Spaces are required between each argument and switch in the code, and between the switch and its parameter:
 - Right: { Date \@ "hh:mm" }
 - Wrong: { Date \@ "hh:mm" }
- Text strings must be in quotation marks if they contain spaces:
 - Right: { Set CompanyName "ACME Corporation" }
 - Wrong: { Set CompanyName ACME Corporation }
- Do not use colons, semicolons, commas, or any other characters to separate arguments or parameters. (This is not an Excel function!)
 - Right: { If { Date \n "MM/dd" } = 12/25 "Merry Christmas!" "Have a nice day!" }
 - Wrong { If { Date \n "MM/dd" } = 12/25; "Merry Christmas!"; "Have a nice day!" }
- When nesting fields, do not manually type the curly braces for the inner field; insert them with Ctrl+F9.

Toggling Between Data and Field Code Views

By default, a field displays its result in the document rather than its code. (Exception: Fields that do not generate results, such as bookmarks and index markers, do not display at all by default.)

To toggle between displaying the field result and the field code, do either of the following:

- Select the field and press Shift+F9.
- Right-click the field and choose Toggle Field Codes.

Note that this toggles only the selected field. To toggle more than one field at once, select a contiguous area of the document that includes multiple fields and press Shift+F9. To toggle all the field codes in the entire document at once, press Alt+F9, or select the entire document (Ctrl+A) before pressing Shift+F9.

Field codes in the document appear just like they do in the Field dialog box (refer to Figure 16.2). They appear with a gray background, which helps you remember they are fields, but that gray background does not print and does not appear in Print Preview or Full Screen Reading view.

note

There is one minor difference between what appears in the Field dialog box and what appears with codes displayed inline in the document. If the Preserve Formatting During Updates check box was marked in the Field dialog box, the * MERGEFORMAT switch appears inline. It does not appear in the Field dialog box's version of the code string.

Editing Field Code Strings

When a field code string is displayed in the document (Shift+F9), you can edit it manually just like any other text. The trick is knowing what to type. Many fields have fairly complex code strings with various properties and options.

Most people aren't able to remember all the syntax rules for each field type, of course, so Word provides an easier way to edit a field code string: Right-click the field code and choose Edit Field. The Field dialog box reappears, as in Figure 16.1, and you can make any changes needed via a friendly dialog box interface.

tip

After creating a custom field code string, save it to the Quick Parts gallery for easy reuse. To do so, on the Insert tab click Quick Parts, and then click Save Selection to Quick Part Gallery. Store it in any gallery you like. (You might want to create a new category called Custom Fields, for example.)

Nesting Fields

When you're using fields that require input, such as the logical condition ones like {Compare} and {If}, you might want that input to come from other fields. To manage this, you can nest one field inside another.

For example, you might want to test whether today is a certain day of the week. If it is Friday, this message should appear: "Time cards are due today by 5:00 p.m." Otherwise, this message should appear: "Time cards are due on Fridays by 5:00 p.m." Here's the complete syntax for that:

```
{ If { Date \@ "dddd" } = "Friday" "Time cards are due today by 5:00 p.m." "Time cards are due on Fridays by 5:00 p.m." }
```

The main thing to remember when nesting fields is that you can't type the braces for the nested fields; you must insert the braces with Ctrl+F9. Let's go over the general process.

First, you would start the outer field:

1. Press Ctrl+F9 to insert a new blank set of braces.
2. Type the desired field name and then any portion of the field's properties or switches that should come before the nested field.
3. Press Ctrl+F9 to insert another new blank set of braces, and in the new set, type the field to be nested.
4. Click to move the insertion point to the right of the closing bracket for the nested field, and continue typing the outer field.
5. Press F9 to update the field and display its result.

Here's another example. The {Set} field creates a bookmark. It requires two pieces of information: the bookmark name and the text that should be placed within it. So, for example, if you want to create a bookmark called CompanyName and set its value to Microsoft, the field should read as follows:

```
{ Set CompanyName "Microsoft" }
```

That's fine, but what if the company name changes? You can instead use the {FillIn} field to ask the user to specify the company name:

```
{ Set CompanyName { FillIn "Enter the company name" } }
```

Now suppose you want to enter that company's name in the Title field of the document's properties. Create another nested set of fields like this:

```
{ Title { Ref CompanyName } }
```



When you're inserting a date or time via the Field dialog box, the examples that appear in the Date Formats list show today's date. If you are more comfortable choosing based on the generic syntax, such as M/d/yyyy, click the Field Codes button and then click the Options button; the list of formats that appears in the Field Options dialog box shows the generic codes.

Selecting the Right Field

A big part of using fields successfully in Word is knowing which fields are available and which are most applicable to a particular situation. The following sections explain the types of fields available.

Date and Time Fields

In Chapter 7, "Formatting Documents and Sections," you learned that you can click Date & Time on the Insert tab to insert a date or time code via a dialog box interface. If you mark the Update

Automatically check box in this dialog box, Word inserts a {Date} field rather than the actual date or time. If you toggle the field code on an inserted date (Shift+F9), it might look something like this:

```
{ Date \@ "M/d/yyyy" }
```

The main switch for the {Date} field is \@, which is followed by the syntax for the date or time format you want.

The {Date} field has a few other switches, but you'll probably never use them:

- \h is for the Hijri/Lunar calendar.
- \l is used to insert the date with the last format chosen using the Date and Time dialog box.
- \s is used for the Saka Era calendar.

You might be surprised to find that inserting a time with the Date and Time dialog box does *not* insert a {Time} field. Instead, it inserts a {Date} field with time-based formatting. For example:

```
{ Date \@ "HH:mm" }
```

So what's the {Time} field for? It's basically the same as {Date}, except with fewer options. You can't specify a certain alternative calendar via switches, for example. Strictly speaking, the {Time} field is redundant. It doesn't need to exist, except that people expect it to and might not think to use a {Date} field to express a time.

 *To learn how to create custom date and time formats, see “Constructing a Custom Date or Time Format,” p. 636.*

Besides the {Date} and {Time} fields, there are several other date/time-related fields from which you can choose. All of them pull their information from the file's properties, not from the PC's clock/calendar.

- {CreateDate} displays the file creation date. It never changes, because the document's creation date never changes.
- {PrintDate} displays the date on which the document was last printed. It updates itself automatically when you print the document.
- {SaveDate} displays the date on which the document was last saved. It updates itself automatically when you save the document.
- {EditTime} displays the total amount of time spent editing the document. It does not update automatically.

Document Information Fields

As you learned in “Inserting a Document Property” in Chapter 7, each document has a set of properties. Some of those properties are editable, such as Author; others are automatically calculated

by Word, such as FileSize. You can insert these document properties into the document using the document information fields.

Most of these fields have an obvious one-to-one correlation with a certain property. For example, the {Author} field inserts the author's name, the {Comments} field inserts any comments that have been placed in the document properties, and so on. The field properties vary depending on the nature of the information being inserted. Fields that insert text have properties for setting text case; fields that insert numbers have properties for choosing a number format. Some fields also have additional options. For example, in Figure 16.4, the {FileSize} field's result can be expressed in either kilobytes or megabytes.

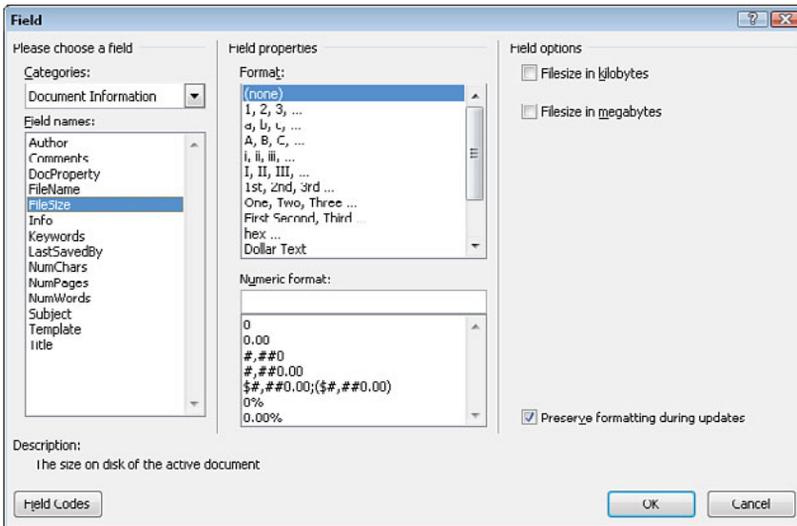


Figure 16.4 Document information fields insert various document properties.

If you do an item-by-item check of fields versus properties, you will find that not every document property has a corresponding field. The {DocProperty} field helps overcome this problem. It is a generic inserter for whatever document property you specify. Its list of available properties includes every property available for the document (except custom properties).

For example, suppose you want to insert the company name from the Company property. There is no Company field, so you would use {DocProperty} like so:

```
{ DocProperty Company }
```

Document Information Content Controls

There is another way of inserting document properties into the document text—content controls. A *content control* is an XML-based tag that pulls information from a data source—in this case, your document file's properties.

To insert document information via a content control, on the Insert tab click Quick Parts, Document Property; then click the desired piece of information, such as Author.

Content controls are not fields; they are a type of link. Content controls automatically update when their data changes; for example, if you change the author name of the file, an Author content control updates immediately in the document; in contrast, an {Author} field does not.

User Information Fields

These three simple fields pull user information from Word. They are somewhat like the document information fields. However, this data is not stored with the document, but with the logged-in user on the PC:

- {UserAddress} inserts the user's address, if set up in the program. To set up an address, choose File, Options, and click Advanced. In the General section, enter the address into the Mailing Address box.
- {UserInitials} inserts the user's initials, if set up in the program. To set up initials, choose File, Options, click General, and enter the initials into the Initials box.
- {UserName} enters the user's name, if set up in the program. To set up the name, choose File, Options, click General, and enter the name into the User Name box.

Numbering Fields

The numbering fields have one thing in common: They help you automatically number various types of items in your document. Each is automatically updated whenever you add more numbering fields or rearrange existing fields. For example, if you switch the positions of two figure captions, they also switch numbering.

Most of the numbering fields are inserted via Word's user interface in various contexts, but a few are available only via the Field dialog box. The numbering fields are listed here:

- {AutoNum} inserts an automatic number. You can specify the formatting you want for it (Arabic, Roman, letters, and so on). Use this to number anything you like. Each {AutoNum} code in the document shows an incremented value.
- {AutoNumLg1} inserts an automatic number in legal format, with or without a trailing period.

note

The {AutoNum}, {AutoNumLg1}, and {AutoNumOut} fields are sequenced together, so the same list continues regardless of which of the three field codes you use. There are no switches or properties; the list is completely automatic.

- {AutoNumOut} inserts an automatic number in outline format.
- {BarCode} inserts a delivery point bar code based on the text found in a bookmark. Generally, the bookmark points to a ZIP Code field and changes for each mail merge record with the {Set} field.
- {ListNum} inserts numbering for a list. This is somewhat like {AutoNum}, but rather than there being three separate fields for regular numbers, legal numbers, and outlines, there are field properties that define which type of list to use. The valid values for this property are LegalDefault, NumberDefault, and OutlineDefault. Another difference is that you can set the level in the list, and you can set a start-at value, so you can have some control over the list.
- {Page} inserts the number of the current page. You most commonly use this in headers and footers, but you can use it anywhere in the document.
- {RevNum} counts the number of times the document has been saved. Each time it is saved, the {RevNum} counter is incremented.
- {Section} displays the section number where the field is placed.
- {SectionPages} displays the total pages in the section where the field is placed.
- {Seq} inserts an automatic sequence number. This is the field used for figure captions and other automatically numbered items. A bookmark is created to indicate what type of item is being sequenced. For example, to automatically number figures, each figure has a caption like this: Figure {Seq Figure}. Optional switches can be added for formatting—for example, {Seq Figure \? ARABIC}.

Equation and Formula Fields

These math-related fields are mostly covered elsewhere in Word; you will seldom have reason to insert them manually via the Field dialog box. Here's a quick round-up of them:

- {=} is a formula field. Do not try to construct its syntax manually; instead, click the Formula button in the Field dialog box and construct the formula via the Formula dialog box.
- {Advance} offsets the position of the subsequent text by a specified number of points in a specified direction. You might use this to fine-tune the positioning of text on a page when trying to make printed text line up correctly on a preprinted form, for example.
- {Eq} inserts an equation using the legacy-style Equation Editor (that is, the version from Word 97–2003). Word does not recommend that you construct the syntax manually; click the Equation Editor button in the Field dialog box to open the legacy Equation Editor.

 **caution**

For the {Advance} field, the expected entries for the field options are not obvious in the Field dialog box. For more information, click Field Codes, and then click Options to see a complete list of the switches and get information about each one.

- {Symbol} inserts a symbol, by character number, from a specified font. If no font is specified, the font assigned to the paragraph where the field resides takes precedence. Usually it is preferable to use the Symbol insertion controls on the Insert tab to insert a symbol because you can browse for the desired symbol more easily (that is, you don't have to know its number).

Index and Table Fields

These fields mark entries for tables of contents, indexes, and tables of authorities; then they generate those items. (The “Table” in this category’s name refers to tables of contents, tables of authorities, and tables of figures, not to ordinary Word tables.)

These codes are hardly ever inserted manually. A user would use the Table of Contents, Table of Authorities, or Index feature in Word to insert the markers and generate the listings. However, it is useful to know what the various codes mean, in case you see them in documents and need to decide whether to keep or delete them.

These are the codes for indexes:

- {XE} marks index entries. Various properties and options are available for defining an entry, but these are best created with the Mark Index Entry dialog box (covered in Chapter 19, “Creating Tables of Contents and Indexes”).
- {Index} generates the index.

For tables of contents, these codes apply:

- {TC} marks table of contents entries. Usually tables of contents are generated automatically based on heading levels, but you can use this field to manually mark some text to be included.
- {TOC} generates the table of contents.

For tables of authorities:

- {TA} marks the table of authorities entries.
- {TOA} generates the table of authorities.

➡ *To create an index, see “Marking Index Entries,” p. 741 and “Generating the Index,” p. 749.*

➡ *To create a table of contents, see “Creating a Table of Contents,” p. 723.*

➡ *To create a table of authorities, see “Creating Citations and Tables of Authorities,” p. 737.*

Link and Reference Fields

This category contains fields that insert linked content from other locations, as well as fields that automatically number pages and footnotes. (Automatic numbering of other items, such as list numbering or figure caption numbering, is handled by fields in the Numbering category, covered previously in this chapter.)

Several of the linking-type fields were covered in Chapter 15, “Copying, Linking, and Embedding Data.” Here’s a quick review of those:

- `{Hyperlink}` inserts a hyperlink. Hyperlinks are more commonly inserted via the Hyperlink command on the Insert tab.
- `{Link}` inserts an OLE link to an object. OLE links are more commonly inserted via Paste Special or the Insert Object command.
- `{IncludePicture}` inserts a non-OLE link to an external picture. Picture links are more commonly inserted via the Insert Picture dialog box by selecting Insert and Link from the Insert button’s drop-down list.
- `{IncludeText}` inserts a non-OLE link to an external text file. Text links are more commonly inserted via the Insert Text from File command by selecting Insert as Link from the Insert button’s drop-down list.

The following fields insert numbering codes:

- `{NoteRef}` inserts the number of a footnote or endnote. These numbers are automatically updated as content changes in the document. These are normally placed via footnote and endnote insertion.
- `{PageRef}` inserts the page number on which the specified bookmark appears. This code is inserted when you create a cross-reference that refers to a page number.

And these fields insert text strings of various types:

- `{Quote}` inserts a literal text string that you specify. For example, `{Quote "Hello world"}` displays the text Hello world.
- `{Ref}` inserts text marked by a bookmark. You learned about this one in Chapter 15, in the section “Inserting a Cross-Reference to a Bookmark.”
- `{StyleRef}` inserts the text from a paragraph that has the specified style applied. For example, if you have the title of your document set up with a style called DocTitle, the field `{StyleRef DocTitle}` inserts that title later in the document.

There are also two AutoText-related fields:

- `{AutoText}` inserts the specified AutoText entry as an updatable link. This is different from inserting AutoText items from the Building Blocks feature, as in “Working with Building Blocks” in Chapter 2, because the latter inserts an unlinked, nonupdatable copy.
- `{AutoTextList}` creates a shortcut menu based on AutoText entries in the active template. You specify some placeholder text to appear in the field. When the user right-clicks the field, a pop-up list appears of AutoText entries to choose from to fill in that field.

Creating a Pop-Up List

The `{AutoTextList}` field generates a pop-up list based on the style applied to the field and the items in the AutoText gallery that share that same style. Here's a quick exercise to see how it works:

1. Create a new paragraph style called Popup (or anything else you want to call it).
2. Type the text for the first entry you want on your pop-up list into the document and then apply the Popup style to it.
3. Select the entire entry, and on the Insert tab, click Quick Parts and click Save Selection to Quick Part Gallery.
4. In the Create New Building Block dialog box, set the Gallery to AutoText and save it there.
5. Repeat steps 2–4 for each item you want to appear on the pop-up menu.
6. Position the insertion point where you want the field and then press `Ctrl+F9` to start a new, blank field. Within the field's curly braces, type the following: `AutoTextList "Right-click here" \s Popup`
7. Press `Shift+F9` to toggle the field codes off.
8. Right-click the field, and a menu appears showing your AutoText choices.
9. Click one of the choices on the menu to fill in the field.

Document Automation Fields

The document automation fields are used to set up code strings that automate processes in the document. Some programmers prefer to use document automation fields rather than Visual Basic for Applications for some basic automation tasks like filling in a form with user information or determining whether one value equals another. Here are a few simple examples.

The `{Compare}` field compares two values and returns a 1 if the comparison is true or 0 if it is false. It is a programming construct, useful for setting up logical conditions. For example, you might count the number of words in the document with the `{NumWords}` field and then compare that value to 1000:

```
{ Compare {NumWords} >= 1000 }
```

This `{Compare}` field returns a 1 if the word count is 1000 or above; otherwise, it returns a 0.

The 1 and 0 are all well and good, but it might be nicer to show some meaningful text based on the condition. For that, we need an `{If}` field. Here's an `{If}` field's syntax:

```
Expression1 Operator Expression2 TextTrue TextFalse
```

Suppose, for example, that if {NumWords} is at least 1000, we want to print “OK” in the document; otherwise, we want to print “Need More Words”. Here’s the {If} field to accomplish that:

```
{ IF {NumWords} >= 1000 "OK" "Need More Words" }
```

Here are the other available document automation fields:

- {DocVariable} inserts the value of a VBA Word document variable. (This is not the same as the document’s properties, which you can insert with document information fields covered previously in this chapter.)
- {GoToButton} inserts a button that, when clicked, jumps the insertion point to a specified bookmarked location.
- {MacroButton} inserts a button that, when clicked, runs a specified macro.
- {Print} sends a print instruction to the printer; you can use it to automatically print a document, for example. It is usually combined with some other field, such as {If}, rather than standing alone.

Mail Merge Fields

Chapter 14, “Performing Mail and Data Merges,” covers the Mail Merge feature in Word, which is a robust tool for merging the data from one file or database with a document in another file. Most of the fields involved in mail merging are automatically inserted when you work through the mail merge, or you can insert them using the Rules list on the Mailings tab.

- {AddressBlock} inserts data pulled from multiple fields to form a standard postal mailing address.
- {Ask} prompts the user to enter a value to be stored in a bookmark. You can then insert the content of that bookmark anywhere in the document via the {Ref} field.
- {Compare} compares two values and shows a 1 or 0, depending on whether they match. You learned about this field earlier in the chapter in the “Document Automation Fields” section.
- {Database} inserts the results of a database query in a Word table.
- {Fill-in} prompts the user to enter a value and then displays it in the field. This is different from {Ask} in that it does not store the value in a bookmark for later reuse.
- {GreetingLine} inserts a greeting line in a mail merge document. You can optionally use the \e switch to specify what name to use if the name is blank. For example, you might want something like *Dear Valued Customer*.
- {If} prescribes two different actions to take based on the outcome of a logical test. This is like {Compare} except you can specify the output in each situation rather than accepting the default 1 and 0 outputs.

- `{MergeField}` inserts a mail merge field. It requires a field name property, like this: `{MergeField FirstName}`.
- `{MergeRec}` numbers each merged record in a mail merge. If a filter excludes any records, they are still numbered, and the numbered records have gaps in the numbering.
- `{MergeSeq}` also numbers each merged record in a mail merge, but it does not number records excluded by a filter.
- `{Next}` goes to the next record.
- `{NextIf}` goes to the next record in a mail merge only if a condition is met.
- `{Set}` assigns new text to a bookmark.
- `{SkipIf}` skips the next record in a mail merge only if a condition is met. It is the opposite of `{NextIf}`.

Updating and Editing Fields

Now that you know about the fields you can insert, let's look at how you can edit the properties of a field and update its values after insertion.

Updating a Field

Most fields are not automatically updated each time you open or save the document. (In this way, they differ from OLE linked objects, which are automatically updated by default.)

To update a single field, select it (or click anywhere in it) and press F9, or right-click the field and choose Update Field. If you have toggled the display of the field code string on, updating the field toggles it back to displaying the results.

To update multiple fields at once, select them as part of a contiguous selection range and press F9. To update all the fields in the entire document, select the entire document (Ctrl+A) and press F9. If the update takes too long, you can abort it by pressing Esc.

You can't update all fields. Certain fields are not affected by performing an update because they do not pull information from a source that can be changed. For example, the Print, MacroButton, GoToButton, and Eq fields are like that.

In addition, certain fields are not affected by performing a manual update because they automatically update themselves. Examples include Date, Time, Page, and Seq. Date and Time update each time you open or print the document (or open it in Print Preview), and item-numbering fields such as Page and Seq update whenever there is a change in pagination or item sequencing, respectively.

Before we get into specifics, it's worth noting that a lot of keyboard shortcuts are involved in working with fields, and some of them are the only way to accomplish a particular action. Table 16.2 includes a quick summary of these shortcuts.

Table 16.2 Summary of Keyboard Shortcuts for Fields

Description	Shortcut
Save changes to the source file (only for {IncludeText})	Ctrl+Shift+F7
Update the selected field(s)	F9
Toggle field code display	Shift+F9
Insert a blank set of field braces	Ctrl+F9
Run macro (only for {MacroButton})	Alt+Shift+F9
Unlink a field	Ctrl+Shift+F9
Go to the next field	F11
Go to the previous field	Shift+F11
Lock a field from changes	Ctrl+F11
Unlock a locked field	Ctrl+Shift+F11



Field Doesn't Update

Remember, most fields do not update automatically. To manually update a field, right-click it and choose Update Field, or select it and press F9.

If neither of these methods works, check to make sure the field is not locked. Try unlocking it by selecting the field and pressing Ctrl+Shift+F11. Also examine the field's code and make sure that the \! switch is not present. (That switch locks the field against changes.)

Check to make sure that it's actually a field. When you right-click it, does the Update Field command appear on the shortcut menu? If not, perhaps it's not a field; it might have gotten unlinked (perhaps you accidentally pressed Ctrl+Shift+F9 on it to unlink it), or it might not have been a correctly constructed field in the first place.

If all else fails, delete the field and re-create it.

Locking Fields Against Updates

Some fields can be *locked*, so they are never updated even when someone issues an Update Field command on them. For example, if you use a field to enter the current date on the day the document was created, you would not want that field to update every time you open the document.

Some fields have a Prevent Fields from Being Updated check box in the Field dialog box. Marking this check box adds a \! switch in the code string for that field. You can type the switch into the code string manually if you find that easier than going back to the Field dialog box.

If the field you want to lock does not have that \! switch as part of its syntax, here's another way: Click in the field and press Ctrl+F11. To confirm that the field has been locked, right-click it; the Update Field command is unavailable on the menu that appears.

To unlock a field that has been locked this way, click in it and press Ctrl+Shift+F11.

Updating Fields for Printing

By default, Word does not automatically update fields before printing. This is intentional, because it gives you more control over your data. If you would like to change this behavior so that all links are updated before printing, open the Word Options dialog box (File, Options), click Display, and mark the Update Fields Before Printing check box.



tip

You do not have to turn on Update Fields Before Printing for dates and times to update; they update automatically when you view the document in Print Preview or when you print.

Finding and Moving Between Fields

Sometimes it can be difficult to know where the fields are actually located in a document, especially when some of the fields do not contain visible content, such as a bookmark or index marker.

There are several ways to surmount this obstacle. One way is to select the entire document and toggle the field codes (Shift+F9). It doesn't take you to the codes, but it makes them easy to see.

Another way, which you can actually combine with the preceding one, is to go to the next field code by pressing F11 or to the previous one by pressing Shift+F11. Word jumps to the beginning of the next or previous field. You might not see anything there (if the field is hidden), but after jumping to that spot, right-click the spot and choose Toggle Field Codes or press Shift+F9, and the field appears.

A third way is to use the Select Browse Object feature, covered in Chapter 2, "Typing and Editing Text," to move from one field to the next. Click the Select Browse Object button (or press Ctrl+Alt+Home) and choose Browse by Field to go to the next field.

➔ *To review Select Browse Object as a method of finding objects, see "Using Select Browse Object," p. 80.*

Converting Fields to Plaintext

If you decide at some point that you will never want to update a particular field again, you can convert it to regular text (that is, *unlink* it). Doing so copies its current value into the document and then deletes the field placeholder.

Before unlinking a field, update it one last time (F9) if needed. Then select it (or select multiple fields to operate on at once) and press Ctrl+Shift+F9. You can reverse an unlink with an Undo operation, but otherwise it's a one-way route. To restore the field, you need to reinsert it from scratch.



note

Unlinking has no effect on a marker type of field, such as a bookmark or index entry.

Formatting Fields

When a field inserts data from another source, such as from a bookmark or an external text file, the formatting of the original is inserted, too. For example, suppose you bookmark the text *The New Deal* in one section of your document, and you create a bookmark for it called NewDeal. Now when

you insert that bookmarked text elsewhere in the document with the {Ref NewDeal} field, the inserted text appears bold and in italic.

That's the basic default for the formatting, but there are some ways to circumvent that, as you'll learn in the next several sections.

Preventing the Formatting from Changing

What happens if you change the formatting of the original and then update the field? That depends on a switch. Ordinarily the formatting would change, but you can prevent it from changing by using the * MERGEFORMAT switch. For example:

```
{ Ref NewDeal \* MERGEFORMAT }
```

You can also employ MERGEFORMAT to lock in any manual formatting you have applied to the field.

Specifying Font Formatting for a Field

To apply specific font formatting to the text displayed in a field, toggle on the field code display and then format the first character in the field name the way you want the field result to be. (Font formatting in this context includes font, size, color, and attributes such as bold, italic, and underline.)

For example, with the {Ref} example from the preceding section, suppose you want to format that field's result as italic. Select the "R" in "Ref" and click the Italic button Mini Toolbar that appears. Then add * charformat to the end of the code string. (This part is not required if the field has no arguments.)

```
{ Ref NewDeal \* charformat }
```

Then update the field (F9) to see the change.

Specifying a Numbering Type

Numeric fields can use any of several types of characters to represent the numbers, such as Arabic (1, 2, 3), Roman (I, II, III), and so on. To specify the type of numbering, use the * switch followed by the appropriate code. The easiest way to set a numbering type is in the Field dialog box; it provides a list of the available types. Alternatively, you can use switches in the field code, as in Table 16.3. (Note that the codes are case-sensitive; alphabetic is different from ALPHABETIC, for example.)

Table 16.3 Codes for Numbering Types

Numbering	Switch	Example	Notes
1, 2, 3	* Arabic	23	
a, b, c	* alphabetic	w	After the 26th letter, the letters start repeating: 27 would be aa, 28 would be ab, and so on.

Table 16.3 Continued

Numbering	Switch	Example	Notes
A, B, C	* ALPHABETIC	W	Same as preceding except uppercase.
i, ii, iii	* roman	xxiii	
I, II, III	* ROMAN	XXIII	
1st, 2nd, 3rd	* Ordinal	23rd	
First, Second, Third	* Ordtext	twenty-third	
One, Two, Three	* Cardtext	twenty-three	
Hex	* Hex	17	Hexadecimal numbering. Each place is 16, so 23 would be 1 × 16 plus 7.
Dollar Text	* DollarText	Twenty-three and 00/100	Converts numerals to written-out words for the numbers. This is the format traditionally used for writing checks.

Constructing a Custom Numeric Format

A numeric field's number format (aka the *numeric picture*) controls the appearance of the number in cosmetic ways, such as its number of decimal places, its presence of currency symbols or percent signs, and so on.

The easiest way to set the number format is in the Field dialog box; a list of available types is provided. It is much easier to construct the codes this way than to build them manually. Alternatively, you can use the \# switch, followed by the numbering format in quotation marks. For example:

```
{ FileSize \# "#,##0" }
```

If you want to build the numbering format code manually, consult Table 16.4 for the symbols to use.

Table 16.4 Codes for Numeric Pictures

Character	Purpose	Notes
#	A number if present; otherwise, a blank space. Rounds off extra fractional digits.	Use this to limit a number to a maximum number of decimal places, like this: #.##. Any places not needed do not appear.
0	A number if present; otherwise, a zero.	Use this to force a number to a minimum number of decimal places, like this: 0.00. Any places not needed appear as zeros.
\$	Places a literal dollar sign in the field result.	

Table 16.4 Continued

Character	Purpose	Notes
+	Places a plus or minus sign in front of any field result other than zero.	This is not a literal plus sign; it changes to a minus sign for a negative number.
-	Places a minus sign in front of negative numbers.	This is not a literal minus sign; it does not appear for a positive number.
.	Places a literal decimal point in the field result.	Use this to separate # or 0 codes to show where in the number those codes are referring to. For example, 0.0# indicates a required digit before and after the decimal point in the number and an optional second decimal place if needed.
,	Places a literal comma in the field result.	Use this to separate hundreds from thousands to the left of the decimal point: #,###.##. It does not necessarily conform to common usage that dictates a comma every third place; you could just as easily set up one like #,0 that would place a comma between the first and second digits.
;	Separates multiple options for a number.	You can have separate formatting sections for positive, negative, and zero numbers, in that order. For example, \$###.00;(\$###.00),\$0.00.
text	Adds literal text to the format.	Enclose in single quotes. For example, use this to include the word Dollars after the number: ###.00 'Dollars'

Constructing a Custom Date or Time Format

When you select a date or time from the Date and Time dialog box or from the Field dialog box, a list of sample formats appears. Choosing a format from one of those locations relieves you of the need to manually construct a date/time picture with switches.

However, in some cases, the format you want might not be available on the list. In such situations, you must manually construct the needed code for the switch.

For date and time fields, a \@ switch is used, followed by the desired formatting codes in quotation marks. For example:

```
{ Date \@ "MMMM d yyyy" }  
{ Time \@ "hh:mm AM/PM" }
```

The code is a combination of placeholders and literal characters. The valid literal characters are colon (:), dash (-), and slash (\). They separate the parts of the date or time. Typically, colons separate hours, minutes, and seconds in times, and dashes or slashes separate months, days, and years in dates.

The valid characters for placeholders are shown in Table 16.5.

Table 16.5 Codes for Date or Time Formats

Characters	Purpose	Sample Code	Sample Result
M	Month number, 1 through 12	{ Date \@ "M" }	8
MM	Month number, 01 through 12	{ Date \@ "MM" }	08
MMM	Three-letter month abbreviation	{ Date \@ "MMM" }	Aug
MMMM	Full month name	{ Date \@ "MMMM" }	August
d	Day number, 1 through 31	{ Date \@ "d" }	5
dd	Day number, 01 through 31	{ Date \@ "dd" }	05
ddd	Three-letter day of the week abbreviation	{ Date \@ "ddd" }	Tue
dddd	Full day of the week	{ Date \@ "dddd" }	Tuesday
y	Two-digit year	{ Date \@ "y" }	10
yy	Four-digit year	{ Date \@ "yy" }	2010
h	Hour on 12-hour clock, 1 through 12	{ Time \@ "h" }	3
hh	Hour on 12-hour clock, 01 through 12	{ Time \@ "hh" }	03
H	Hour on 24-hour clock, 0 to 23	{ Time \@ "H" }	3 or 17
HH	Hour on 24-hour clock, 00 to 23	{ Time \@ "HH" }	03 or 17
m	Minutes, 0 to 59	{ Time \@ "m" }	4
mm	Minutes, 00 to 59	{ Time \@ "mm" }	04
AM/PM	AM or PM, uppercase	{ Time \@ "hh:mm AM/PM" }	03:04 AM
am/pm	am or pm, lowercase	{ Time \@ "hh:mm am/pm" }	03:04 am

Understanding Forms

Forms enable you to collect information from people via a fill-in-the-blanks interface. The forms you create in Word can be printed and completed on paper or filled out from within Word. With a little extra programming know-how, you can connect them to an XML data system or an Access database.

Word 2007 introduced a whole new class of form fields called *content controls*, which are used throughout Office 2010 applications as a means of interfacing with external data sources. These content controls have some great capabilities that were not present in Word 2003 and earlier, but they also have a few drawbacks. Therefore, Word 2010 also provides access to—and support for—legacy form controls that work in backward-compatible documents. In the following sections, you learn about both.

Figure 16.5

Create the skeleton of a form, to be populated with form fields later.

Indiana Sheltie Rescue					
Application for Dog Adoption					
First Name:		Last Name:			
Address 1:					
Address 2:					
City:		State:		ZIP:	
Phone (home):		Phone (work):			
Phone (cell):		Best time to call:			
Email:					
<input type="checkbox"/> Why do you want to adopt a sheltie?					

- **Place fields in the expected order**—People expect certain fields to be in a standard order. For example, they expect City to come before State. If you mix them up, users may have problems filling out the form.
- **Plan for different types of fields**—When you actually insert the fields, you can use not only text boxes, but drop-down lists, option buttons, and check boxes. If you think any of those will be useful, insert placeholders for them—and leave enough space for them. For example, a set of option buttons takes up more space than a drop-down list.
- **Leave enough space for user input**—Users will be frustrated if their information won't fit on the form. Leave plenty of space for names, addresses, and so on. Maximilian Theophilus Kreutzcampf will thank you for it.
- **Be clear with your labels**—Make sure it's obvious what users should put in each field. For example, suppose you have a City of Birth field, followed by a field labeled Date. Do you want the date of birth there, or the current date? Fifty percent of your users will probably guess wrong.

Saving a Form as a Template

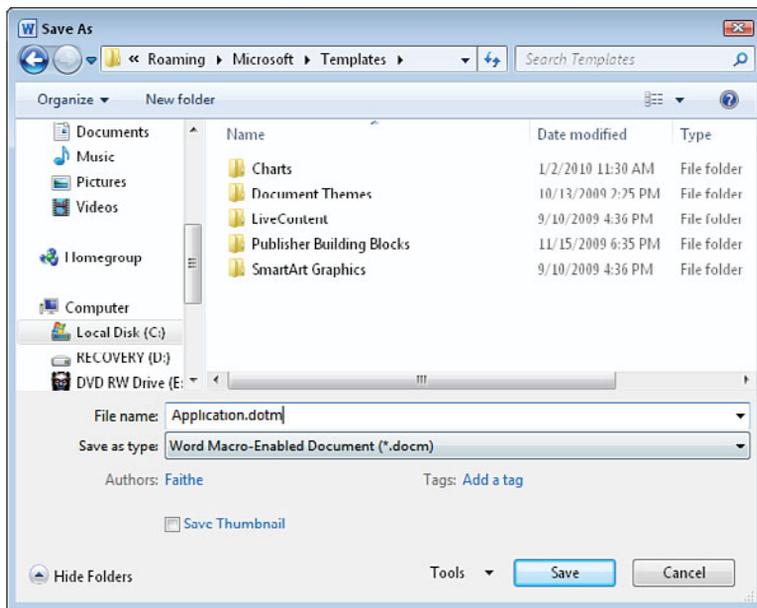
The form isn't finished yet, of course, but now is a good time to save your work as a template. You'll want a template file, not a regular document file, because users will be creating new documents based on it.

To save the form as a template, follow these steps:

1. Choose File, Save As. The Save As dialog box opens.
2. Open the Save as Type list and choose Word Macro-Enabled Template (.dotm). If you aren't planning on storing macros in the template, you could go with Word Template (.dotx) instead.
3. In the File Name box, type the name for the template file (see Figure 16.6).
4. Click Save. The template is saved.

**tip**

If you want the template to be easily accessible when starting a new document, store it in the default location for user templates: C:\Users\username\AppData\Roaming\Microsoft\Templates.

**Figure 16.6**

Save the document as a template. (You'll resave it after inserting the form fields.)

Differentiating Between Content Controls and Legacy Fields

Now you're ready to start inserting the form fields. There are two kinds, though—the Word 2010 form fields (aka content controls) and the legacy form fields that are a carryover from Word versions 2003 and earlier.

Content controls are a natural choice if all the users of your form are using Word 2007 or 2010. Here are some of the advantages:

- There are more types of controls, including rich text, pictures, and a calendar/date picker.
- The document doesn't have to be protected for forms, so you won't have trouble with disabled commands such as spell-checking that plague protected forms.

- You can set a content control so that it can't be deleted or so that it unlinks itself immediately after it's filled in.
- Their XML format makes form fields ideal for connecting with XML data sources.

There are a few things you *can't* do with content controls that the legacy form fields *can*, however:

- You can't save the data only in a separate Word document.
- You can't easily link a macro to a control.
- You can't automatically format input in a predefined number format (such as currency).
- You can't set up a form field that performs a calculation.
- You can't limit the length of an entry.
- You can't fill out a Word 2010 form Word 2003 or earlier.

This chapter focuses mostly on content controls, but it also provides information about the legacy form fields in case you need their capabilities or their backward compatibility.

You can combine the two types of fields in a single form. However, beware when combining the two field types, because they work differently behind the scenes. Here are some reasons to stick to one field type or the other:

- **Saving data only**—If you want to save the data only from the form into a plaintext file (covered later in this chapter), use legacy fields only. This won't work with content control fields.
- **Supporting Word 97–2003 users**—If the form will be filled out by people who use earlier versions of Word, use legacy fields only, and make sure you save the template as a Word 97–2003 template (.dot), not a Word 2010 .dotx or .dotm file.
- **Preparing a database front end**—If you are creating the form as a user interface for entering data into a database, check with the database developer to find out what type of fields you should use—content controls or legacy fields. Stick only with that type. Don't mix and match, because that makes the programming of the connection difficult or impossible.

 **caution**

If you create a form using content controls and then use Save As to save the form in a Word 97–2003 format, a warning appears telling you that the fields will be converted to static text. That's right—static text, not legacy form fields, as you might expect. You lose all your form fields with that backward-saving, so make sure you construct the form using legacy fields if you think you will be saving in an older format later.

On the other hand, if you are creating a form to be printed or to be filled out in Word 2007 or 2010 only and saved as a new Word 2010 document, you can use both field types freely.

Displaying the Developer Tab

To work with forms, you need to work with the Developer tab. It does not appear by default. Here's how to display it:

1. Choose File, Options.
2. Click Customize Ribbon.
3. Mark the Developer check box on the list on the right side of the dialog box.
4. Click OK.

The Developer tab appears just to the right of the View tab. On the Developer tab is a Controls group that contains the buttons you need to build your form.

The Controls group contains eight buttons for Word 2010 content controls, plus one button for legacy and ActiveX controls. That latter button opens a palette of the legacy controls, as shown in Figure 16.7.

The Design Mode button in the Controls group toggles the form between Design Mode (where fields can be added and edited) and regular mode (where fields can be used to collect information).

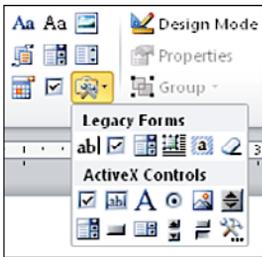


Figure 16.7

You use the Controls group on the Developer tab to insert form fields.

Creating a Form with Content Controls

Content controls work only in Word 2007 and higher documents and templates. They look nice (friendly pale-blue frames with names, as opposed to the plain drab gray boxes in legacy forms), and they are easy for users to understand and use. You can apply formatting styles to them, and you can prevent them from being edited or deleted.

Inserting a Content Control

To insert a content control, follow these steps:

1. Position the insertion point where you want the new control.
2. On the Developer tab, make sure Design Mode is selected.
3. Click one of the content control buttons on the Controls group to insert it into the document.

There are eight content controls you can insert, summarized in Table 16.6. On the Developer tab's Controls group, point to a button to determine which content type it represents.

Table 16.6 Content Control Types

Control	Purpose
Rich Text	Holds text that the user can optionally format (bold, italic, and so on).
Plain Text	Holds plaintext that the user cannot format.
Picture	Holds a picture that the user inserts.
Building Block Gallery	Inserts a placeholder from which the user can select a building block from a gallery you specify.
Combo Box	Displays a list of values from which the user can select, and allows the user to enter other values.
Drop-Down List	Displays a list of values from which the user can select. Other values are not permitted.
Date Picker	Displays a calendar from which the user can click a date.
Check Box	Displays an on/off check box toggle. (This type is new in Word 2010.)

Configuring a Control

A content control is generic after insertion; you must provide its context via its Properties box. To view the Properties for a control, select it and then click the Properties button in the Controls group on the Developer tab.

Settings Common to All Control Types

The options available in the Properties dialog box depend on the control type, but all controls have a Title box, in which you specify the text that should appear in the thin blue bar across the top of the control. Figure 16.8 shows a photo with a title of January, for example.

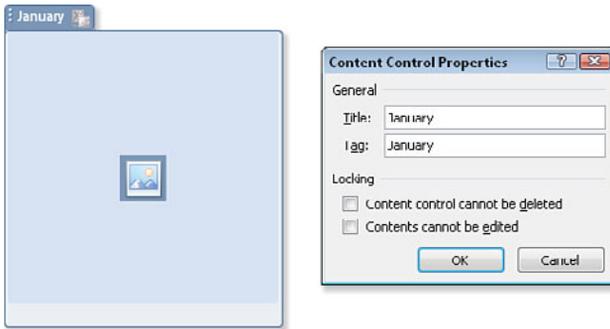
The Locking settings shown in Figure 16.8 are also available for all types of controls:

- **Content control cannot be deleted**—This prevents users from deleting the control.
- **Contents cannot be edited**—This prevents users from changing what they enter in the control after the initial entry.

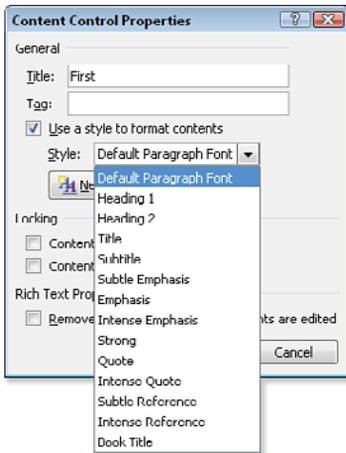
Style Options

By default, a field takes on the paragraph formatting of whatever paragraph you place it in. For some field types, though, you can override this formatting by applying a different style to the field entry.

For Rich Text, Plain Text, Combo Box, and List Box, you can mark Use a Style to Format Contents and then select a style from the Style list (see Figure 16.9). You can also click New Style to create a new style on the fly for it.

**Figure 16.8**

These content control options are common to all types of controls.

**Figure 16.9**

For text fields, you can specify a style to apply.

Multiparagraph Text Options

For a plaintext field only, you can choose Allow Carriage Returns (Multiple Paragraphs). This option enables users to press Enter to start a new paragraph within the field. This option is not available for rich-text fields because they always allow this.

Field-Removal Options

For both rich text and plaintext, you can choose Remove Content Control When Contents Are Edited. This option deletes the field placeholder after the user enters text into it, leaving only the text as a regular part of the document.

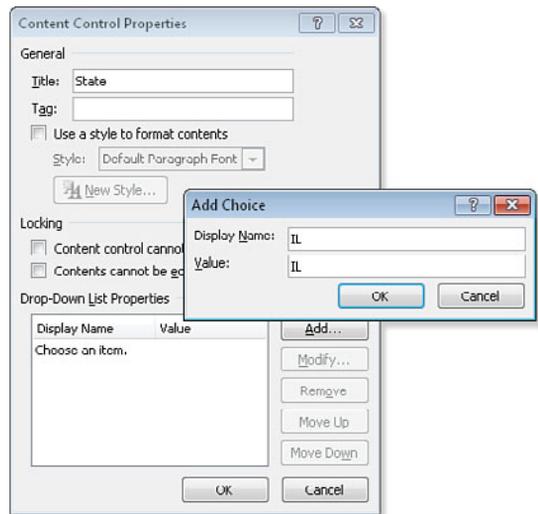
List Options

Combo boxes and list boxes enable you to set up the list that appears when the user activates the control. In the Drop Down List Properties area of the Content Control Properties dialog box, follow these steps:

1. Click Add. The Add Choice dialog box opens.
2. Enter the Display Name. This is the text that appears on the screen.
3. Enter the Value. This is what you enter into the database if you are connected to the form; otherwise, this is just stored with the field (see Figure 16.10).

Figure 16.10

Set up a list from which users can select.



4. Click OK.
5. Repeat steps 1–4 to add more choices to the menu.
6. (Optional) Modify the list by doing any of the following:
 - To modify an entry, select it, click Modify, make changes, and click OK.
 - To delete an entry, select it and click Remove.
 - To reorder the list, select an item and click Move Up or Move Down.
7. Click OK.

Date Options

For a date field, you can control these four settings, as shown in Figure 16.11:

- **Display the Date Like This**—Select a format from the list provided.
- **Locale**—Select a country and language.
- **Calendar Type**—Select a type based on your country. In the United States and most of Europe, the calendar is Western.
- **Store XML Contents in the Following Format When Mapped**—This setting is important only if you will be connecting to an XML data source. Select from the list of formats provided.

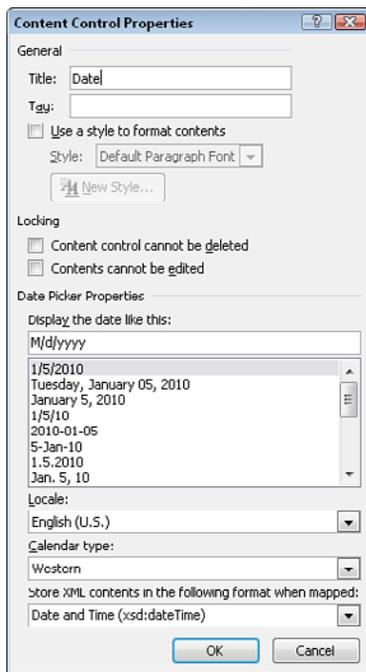


Figure 16.11

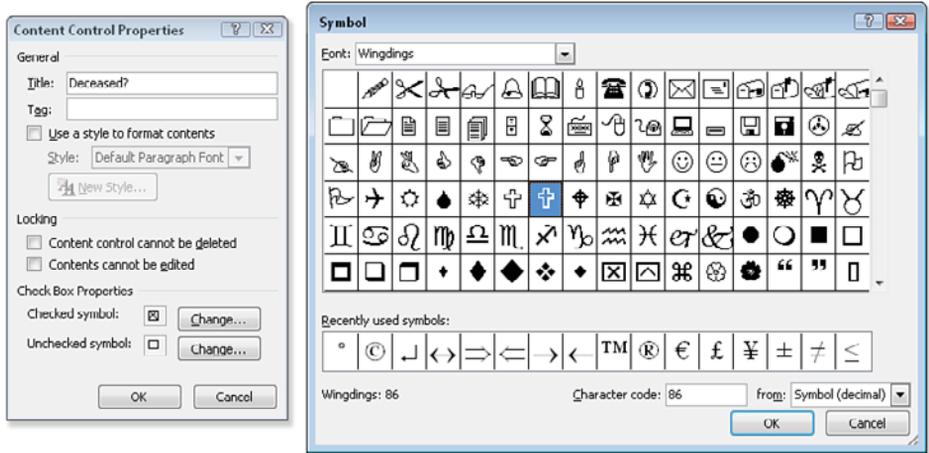
Set date options for a Date content control.

Check Box Options

For a check box, you can control how the box appears when it is checked and when it is unchecked.

To control the appearance, from the Properties box for the control, click the Change button next to Checked Symbol or Unchecked Symbol. Then select a new symbol from the Symbol dialog box that appears. You do not have to use square boxes; you can have it appear as any character or symbol you like. See Figure 16.12.

Figure 16.12
Select a different symbol to represent the marked and unmarked check boxes.



Building Block Options

The same versatile building blocks that you have learned about in other chapters are available for use in forms. For example, you can access any built-in or custom galleries such as Equations, AutoText, and Quick Parts.

The implications of this capability are significant. For example, suppose you have a set of boilerplate paragraphs that you want to be able to select among when composing letters. You could place a Building Blocks field in your template and then have easy access to those paragraphs by clicking that field whenever you are creating a new letter.

The default building block content control doesn't do anything at first; you have to set it up to be associated with a certain gallery and category. To set that up, choose a gallery and category from the Document Building Block Properties.

➔ To learn more about building blocks, including how to create your own categories, see *“Working with Building Blocks, p. 89.*

Editing Placeholder Text

The *placeholder text* for a content control is the text that appears inside the box by default, with instructions such as *Click here to enter text*. If you like, you can customize the wording of that instruction so that it is different for each field. For example, for a control that holds first names, you could change it to *Click here and type your first name*.

caution

Building block insertion works only if the PC on which the form is being completed has the same building blocks available.

note

Most of the changes you make to content control options do not require Design Mode to be on; editing the placeholder text is one of the few situations where you do need it. You can leave it on or off as desired as you work on a form.

To edit a placeholder, follow these steps:

1. On the Developer tab, click the Design Mode button to turn on Design Mode if it is not already on.
2. Click inside the control, where the placeholder text is, and edit the placeholder text there.

Creating a Form with Legacy Form Fields

Legacy form fields are the field types that were available in earlier versions of Word. You can continue to use them in Word 2010, and you *must* use them for forms to be saved in Word 97–2003 format.

Legacy form fields are accessible from the Legacy Tools button’s menu in the Controls group on the Developer tab, as you saw in Figure 16.7. Table 16.7 explains each of them.

Table 16.7 Legacy Form Field Types

Form Field Type	Purpose
Text Form Field	Holds text. Unlike with content controls, you cannot format the text within the field; however, you can format the field.
Check Box Form Field	Creates an on/off check box.
Drop-Down Form Field	Displays a list containing values you specify. Users cannot add their own entries.

Yes, there are only three types of legacy form fields. The other three buttons in the Legacy Forms section of the list have other purposes. Table 16.8 describes them.

Table 16.8 Legacy Form Tools

Tool	Purpose
Insert Frame	Creates a frame. Frames are similar to text boxes; they hold static content.
Form Field Shading	Toggles form field shading on/off.
Reset Form Fields	Clears all entries in fields.



Can I Create Forms Within Email Messages?

Yes, but you can also send Word forms as email attachments in any email program, which actually might be a better way to go because of the limitations of some of the email clients that the recipients might be using.

When people receive an email with form fields (use legacy fields for this, by the way), they see the fields embedded in it. Then when they reply to the email, those fields are editable. See Chapter 22, “Developing Online-Delivered Content,” for more information about how Word works with email.

Inserting a Legacy Field

To insert any legacy field, follow these steps:

1. Position the insertion point where you want the field.
2. On the Developer tab, make sure Design Mode is selected.
3. In the Controls group, click the Legacy Tools button. Its palette of tools appears.
4. Click the desired field type.

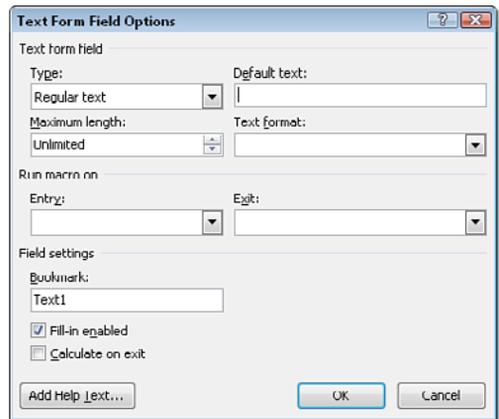
The field appears in the document as either a shaded gray box (for drop-down lists and text boxes) or as a check box (for check boxes).

Inserting a field is simple, but you will probably want to configure it after insertion. One advantage of legacy form fields is that they have some different formatting and configuration options available than content controls. Depending on what you want to do with the form, the legacy form fields might have just the option that will make your life easier.

To view the properties for a form field, right-click it and choose Properties, or click the Properties button on the Developer tab. If there is no Properties command, make sure Design Mode is marked in the Controls group and click the Properties button. Figure 16.13 shows the Properties box for a text field.

Figure 16.13

Set properties for a legacy form field.



Configuring Legacy Text Field Options

There are three basic field types: Regular Text, Number, and Date. Depending on which of these types you select, different formatting options and length restrictions become available in the Options dialog box. The other three choices on the Type menu are special-purpose types, discussed later in this chapter.

If you choose Regular Text, the options shown in Figure 16.13 are available:

- **Default Text**—You can optionally specify default text to appear in the field before the user enters his or her own value.
- **Maximum Length**—This is measured in number of text characters. The default is Unlimited.
- **Text Format**—Choose among Uppercase, Lowercase, First Capital, or Title Case.

➔ *To learn about First Capital and Title Case as formatting options, see “Changing Text Case,” p. 166.*

If you select Number, you can choose among these options:

- **Default Number**—This is just like Default Text; enter a default if desired.
- **Maximum Length**—This is measured in number of digits.
- **Number Format**—This drop-down list lets you specify a numeric format, some of which include currency symbols or percentage signs.

➔ *For information about number format codes, see “Constructing a Custom Numeric Format,” p. 635. You cannot construct a custom format here, but that section helps you understand the available choices.*

Finally, if you choose Date, you can choose among these options:

- **Default Number**—This is just like Default Text; enter a default if desired.
- **Maximum Length**—This is measured in number of digits. It is not typically limited for dates, because dates take up only as much space as they need.
- **Date Format**—This drop-down list lets you specify a date format, including various combinations of month, day, and year.

➔ *For information about date format codes, see “Constructing a Custom Date or Time Format,” p. 636. You cannot construct a custom format here, but that section will help you understand the available choices.*

Inserting the Current Date or Time

If you choose Current Date or Current Time from the Type list in the field's Options dialog box, the field changes to show the current date or time, as determined by the PC's clock. The field no longer accepts user input. It does not automatically update, but you can update it manually by selecting it and pressing F9.



tip

For best results, set up the data to be calculated in a table, and place the calculated field in that same table. That way, you can refer to various cells by their row and column designators.

Setting Up a Calculation

If you choose Calculation as the type for the field, an Expression text box appears in the Field Options dialog box. In it, enter the formula for the calculation (see Figure 16.14). You can then use any of the calculation methods that Word supports.

➔ *For more information about the calculations that you can perform in Word, see “Performing Math Calculations in a Table,” p. 369.*

Figure 16.14

Set up a Calculation field within a table, and reference cells by row (number) and column (letter).

Room	\$10,000
Board	\$8,000
Tuition	\$22,000
Miscellaneous	\$5,000
Total	\$45,000

Text Form Field Options

Text form field

Type: Calculation Expression: =sum(B1:B4)

Maximum length: Unlimited Number format: \$#,##U;(\$#,##U)

Run macro on

Entry: Exit:

Field settings

Bookmark: Text1

Fill-in enabled

Calculate on exit

Add Help_text... OK Cancel

Configuring Legacy Check Box Options

Check boxes are useful when you have a list of items and the user can select as many of them as he or she wants.

Check boxes have two unique options you can set for them, shown in Figure 16.15:

- **Check Box Size**—The default is Auto, which makes the check box the same size as the text that follows it. If you prefer, you can choose Exactly and enter a size in points.
- **Default Value**—This is set to Not Checked unless you specify otherwise. It determines the check box's starting state.

Figure 16.15

Set the options for a check box.

Check Box Form Field Options

Check box size

Auto

Exactly: 10 pt

Default value

Not checked

Checked

Run macro on

Entry: Exit:

Field settings

Bookmark: Check1

Check box enabled

Calculate on exit

Add Help_text... OK Cancel

Using Option Buttons on a Form

Option buttons are sets of mutually exclusive options, such as Yes/No/Maybe. When the user selects one of them, the others in the group become deselected.

Technically, Word has no capability for option buttons on form fields. However, Word does offer an ActiveX option button. It won't work seamlessly with your other fields if you have big plans for connectivity with a database, and it won't be included if you save or print the data only in a form. However, if you are designing the form to be filled out and saved in ordinary Word documents or on paper, you are probably more concerned with the look of the form than its back-end functionality.

To create an option button set, follow these steps:

1. Position the insertion point where you want the first option button.
2. On the Developer tab, in the Controls group, click Legacy Tools, and in the ActiveX section, click Option Button (the round button, fourth from the left on the top row). A new option button and placeholder label appear.
3. Right-click the option button and choose Properties. The Properties pane opens.
4. In the Caption box, type the text that should appear next to the button.
5. In the GroupName box, type any name you like. (It must be the same for all buttons in the group, though.)
6. Repeat steps 2–5 to insert more option buttons, and make sure they all have the same GroupName.
7. Close the Properties pane.
8. Turn off Design Mode on the Developer tab and try out the buttons.

If you are interested in doing some VBA programming behind an ActiveX control so that it actually does something other than sit there and look good, right-click the control while in Design Mode and choose View Code, and then work in the Microsoft Visual Basic window that appears. (You have to know how to program in VBA for this to be much help to you.)



How Can I Program ActiveX Controls?

If you want to actually do some programming for an ActiveX field, you must know Visual Basic for Applications (VBA). To access the Visual Basic editor for a control, right-click the control while in Design Mode and choose View Code. Then work in the Microsoft Visual Basic window that opens.

Configuring Legacy List Options

A legacy list box, also called a Drop-Down Form Field, is like the list box content control. It does not allow the user to input his or her own entries like a combo box does.

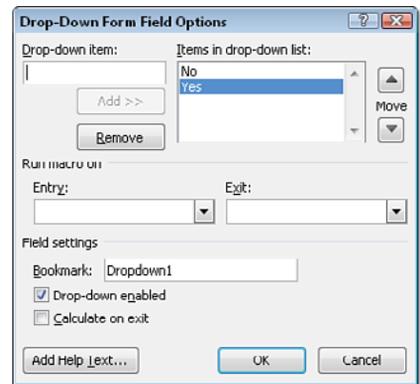
The main thing to set up for a list box is the list itself. Follow these steps to create the list:

1. From the Options dialog box for the field, type the first list item in the Drop-Down Item text box.
2. Click the Add button.
3. Repeat steps 1–2 to enter the other values (see Figure 16.16).
4. (Optional) If you need to remove an item, select it and click Remove.
5. (Optional) To reorder an item, select it and click the Move up and down arrows.
6. Click OK.

caution

If you see a Properties pane instead of the dialog box when you attempt to open the Options dialog box for a legacy text box, check box, or list box, make sure you have chosen a control from the top row of the Legacy Controls list, and not one of the ActiveX controls.

Figure 16.16
Create the drop-down list options.



Setting a Macro to Run on Entry or Exit

If you have macros stored in the template or document, you can run one of them when the user enters or exits a particular field. For example, you might want to set up a macro that saves the file and associates it with exiting the final field on your form.

To set a macro to run on entry or exit, select the macro from the Entry or Exit drop-down list in the field's Options dialog box.

caution

Macro-enabled fields are possible only with legacy form fields. They work in legacy documents and templates (.dot or .doc) and in Word 2010 macro-enabled templates and documents (.dotm and .docm), but not in the regular "x" file formats (.dotx and .docx). It's not that you can't associate a macro with a field in those file formats, but that macros can't exist in those files, so there are no macros to be referenced.

Enabling or Disabling a Field

In some cases, you might want to prevent users from changing the content of a field. Some would argue, “Why use a field at all if the user can’t change it?” But there are reasons for that. For example, if you save the form data only to a text file, only what’s in the fields is saved, so you might want some fixed values to travel along with the user-entered data.

To set up a field so that users cannot input anything into it or change its content, open its Options dialog box (right-click and select Properties) and clear the Fill-In Enabled check box.

Assigning a Bookmark to a Field

Each field has a default bookmark name so you can refer to that field whenever you reference a bookmark. See the section titled “Using a Field to Set Bookmark Text” in Chapter 14, and the section “Working with Bookmarks” in Chapter 15, to learn about the various uses for a bookmark.

To change a field’s default bookmark name, open its Options dialog box (right-click and select Properties) and change the text in the Bookmark text box.

Adding Help Text

For legacy form fields, you can create help text that tells the user what to put in the field. With content controls, this isn’t necessary because you can customize the placeholder text in the field, as you saw earlier in the chapter. But the unfriendly gray boxes of the legacy fields need the extra help.

You can set up help to appear in either or both of two ways: in the status bar or in a pop-up window that appears when the user presses F1 while the insertion point is inside the field. (Pressing F1 any other time opens the regular Word Help window.)

To set up help messages, follow these steps:

1. Right-click the field and choose Properties.
2. Click Add Help Text. The Form Field Help Text dialog box opens.
3. To set up F1 help:
 - a. Click the Help Key (F1) tab.
 - b. Select the option Type Your Own.
 - c. Type the text to appear in the help message (see Figure 16.17).
 - d. Click OK.
4. To set up status bar help:
 - a. Click the Status Bar tab.
 - b. Select the option Type Your Own.

- c. Type the text to appear in the help message.
 - d. Click OK.
5. Click OK.

Figure 16.17
Set up help text.



Creating Consistent Help Messages Across Multiple Forms

For simple forms that aren't part of an extensive form library, you'll probably want to use Type Your Own, as in the preceding steps. However, if you need to reuse the same messages over and over across many forms, consider setting up the help messages as AutoText entries and then choosing AutoText Entry in step b of step 3 or 4. That way, if you change the help message later, all the forms that use it will draw from the same updated version.

To create an AutoText entry to serve as a help message, follow these steps:

1. Type the message text in any document.
2. On the Insert tab, choose Quick Parts, Save Selection to Quick Part Gallery.
3. Type a name for the entry in the Name box.
4. Open the Gallery menu and choose AutoText.
5. Click OK to create the entry.

Now when you choose AutoText Entry from the field's Form Field Help Text dialog box, the entry you created is on the list of available entries.

Protecting a Form

You must protect a legacy form to use its fields. With content controls, protecting the form is optional but recommended.

There are several types of document protection, but the type we're interested in here makes the document uneditable except in the form fields.

To protect a form, follow these steps:

1. On the Developer tab, click Restrict Editing. The Restrict Formatting and Editing task pane opens.
2. In the Editing Restrictions section, mark the Allow Only This Type of Editing in the Document check box.
3. Open the drop-down list below the check box and choose Filling In Forms (see Figure 16.18).



Figure 16.18

Set up protection for the form so that only the fields are editable.

4. Click Yes, Start Enforcing Protection. The Start Enforcing Protection dialog box opens.
If this button is not available, make sure you are not still in Design Mode. Click Design Mode on the Developer tab to turn it off if needed.
5. To put a password on the protection (recommended), type the desired password in the Enter New Password (Optional) box, and then retype it in the Reenter Password to Confirm box.
6. Click OK.

The Restrict Formatting and Editing task pane remains open; close it if desired by clicking the X in its upper-right corner.

To remove the protection so you can further edit the form, follow these steps:

1. If the Restrict Formatting and Editing task pane is not already displayed, click Restrict Editing on the Developer tab.
2. Click Stop Protection.
3. If you put a password on the protection, a dialog box appears prompting you for the password; enter it and click OK.

Filling Out a Form

You will probably want to test your forms as you build them to make sure they are user friendly. Filling out a form is a little different depending on the field type, so the following sections look at the processes separately.

caution

The form can be tested either in the template file or in a document file based on it. If you test the form in the template, though, make sure you do not save your changes with the fields filled in.

Filling Out a Form with Content Controls

To enter text in a content control, click inside the content control and then type the entry for it (see Figure 16.19).

Figure 16.19

Type in a content control.

Indiana Sheltie Rescue				
Application for Dog Adoption				
First Name:	Click here to enter text.	Last Name:	Click here to enter text.	
Address 1:	Click here to enter text.			
Address 2:	Click here to enter text.			
City:	Click here to enter text.	State:	Choose an item.	ZIP: Click here to enter text.
Phone (home):	Click here to enter text.	Phone (work):	Click here to enter text.	
Phone (cell):	Click here to enter text.	Best time to call:	Click here to enter text.	
Email:	Click here to enter text.			

If the form is protected, the insertion point flashes at the beginning of the document, and clicking anywhere in a protected region fails to move the insertion point; it jumps back to the beginning. The only areas you can successfully move the insertion point into are the content controls. With content controls, however, it is not mandatory that the document be protected to test a field. If the document is not protected, you can click anywhere and edit anything, not just the field entries. That's by design; it allows you to put content controls into any document.

Depending on the options set up for the content control, the content control might go away after you enter something into it, or it might become locked against further editing after the initial entry.

If either of those conditions is unsatisfactory, you can turn off their options in the content control's Properties.

Preventing Accidental Content Control Deletion

Because the form is not necessarily protected, the possibility exists that a user will accidentally delete the content control. To prevent that from happening, you can protect each control from deletion by turning on the Content Control Cannot Be Deleted option in the control's Properties dialog box. Follow these steps:

1. Unprotect the form if it is protected, and make sure Design Mode is selected on the Developer tab.
2. Select the content control and click Properties on the Developer tab. The Content Control Properties dialog box opens.
3. Mark the Content Control Cannot Be Deleted check box.
4. Click OK.

Filling Out a Legacy Form

A legacy form doesn't work properly unless it's protected. When unprotected, the form treats the fields as foreign objects, and you can't enter anything into them.

On a protected form, you can click in a field and then type the text into it, or you can press Tab to move from field to field.

If help has been set up for a field, you can press the F1 key to see the help information when the insertion point is within that field. (Pressing F1 any other time opens the general Word 2010 help window, not the specific help for that field.)

Saving and Printing a Form

After filling out the form, you will probably want to either save the form input in a file or send the completed form to the printer. The following sections explain both of those operations.

Saving Only the Form Data

In Word 2003, you could set a save option in the Save As dialog box to save only the form data in a plaintext file. You can't do that from the Save As dialog box anymore, but there's an alternative method you can use.

To save only the form data in a text file, follow these steps:

1. Choose File, Options. The Word Options dialog box opens.
2. Click Advanced.



caution

If your form contains only Word 2007/2010 content controls, the check box in step 4 is grayed out. If the form contains a mixture of content controls and legacy form fields, the check box is available, but the resulting save captures only the data from the legacy fields.

3. Scroll down to the Preserve Fidelity When Sharing This Document section, and make sure the correct document is selected on the list.
4. Mark the Save Form Data as Delimited Text File check box and click OK.
5. Choose File, Save As. The Save As dialog box opens with Plain Text set as the file type.
6. Type a name for the file and click Save to save the text file.

In the resulting text file, the data is comma-delimited with quotation marks around text entries. For example, an address block might look like this:

```
"Sheri Harris", "10783 Westwood Place", "Anderson", "IN", "46282"
```

Printing Only the Form Data

Printing form data is similar to saving form data, in that it works only with legacy form fields, not content controls. When you choose to print only the form data, none of the other text from the form prints. However, if the form was constructed within a table, and that table had visible borders or shading, the table will print along with the data. (If you don't want the table to print, set its borders to None before printing.)

To print only the form data, follow these steps:

1. Choose File, Options. The Word Options dialog box opens.
2. Click Advanced.
3. Scroll down to the When Printing This Document section, and make sure the correct document is selected on the list.
4. Mark the Print Only the Data from a Form check box.
5. Click OK.
6. Print the document as you normally would. None of the text prints except the text in the form fields.

Tips for Creating Printed Forms

Some forms end up being used for both onscreen and on-paper data entry. That's fine, but what constitutes an effective online form might not always be the same as what constitutes an effective printed form.

Here are some things to think about when moving between printed and electronic formats:

- In an onscreen field, users can enter a lot of data in a small field because the text scrolls within the field (at least it does on a legacy form field). When that field is printed, however, there will be a limited amount of space for it. Will your users be able to adequately record their entries in the space provided?

- Drop-down fields do not work on a printed form, so you must replace them with check boxes or option buttons. (See the sidebar “Using Option Buttons on a Form” earlier in this chapter for details.)
- Check boxes might need to be larger on printed forms than on electronic ones. To change the size of a check box, right-click it and choose Properties and make the change in its Options dialog box.
- Calculated fields and fields that insert the current date/time do not work on printed forms, so remove them or change them to user-editable fields.
- Instead of using a legacy check box field, you might prefer to use a bullet character that looks like a check box. If the form will not be submitted electronically, it doesn't matter that it's not a real field. Also, more formatting options are available with a bullet character.

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