

Interactive fields prompt the user to enter specific types of information into a document. Interactive fields are useful for standard business documents, where only certain information changes (such as the author or recipient name). You can set up interactive fields to run when calculated, or you can automate field activation so that prompts will run automatically when the document is opened, for example.

In this session you will:

- ✓ gain an understanding of interactive fields
- ✓ learn how to insert and use a **FILLIN** field
- ✓ learn how to type field codes
- ✓ learn how to activate fields
- ✓ learn how to use **ASK**
- ✓ learn how to use **REF** to display bookmarks
- ✓ learn how to activate fields automatically.

UNDERSTANDING INTERACTIVE FIELDS

Interactive fields are fields that **prompt** the user to enter specific types of information which is then inserted into the document. They are particularly useful in business documents, such

as letters and forms, because they can capture the right information and then insert it in the right place. This page examines how interactive fields capture data and then incorporate it into the document.

Prompting The User For Information

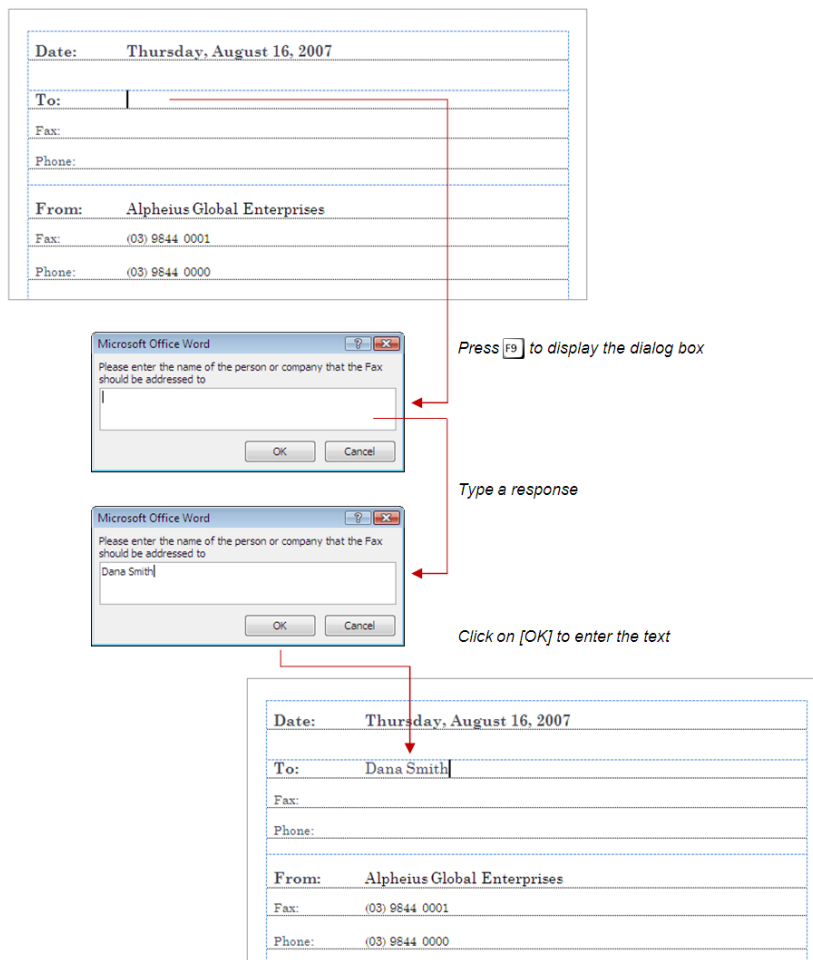
When a document contains an **interactive field**, it will prompt the user for specific types of information. The **prompt text** appears in a dialog box as a message asking the users to enter certain information. For example, you could use **FILLIN** fields in the following fax header sheet to prompt users to enter the relevant information into the fax header, such as name, date and so on.

The beauty of using interactive fields is that users do not need to format or change the document in any way, all they need to do is to complete the fields when prompted. This obviously ensures that formatting and the like is preserved, and also speeds up document production.

Displaying Prompts

There are two ways to display the prompts for users to complete. Users can press **[F9]** when the document is opened to run (recalculate) the fields. Pressing **[F9]** will display the prompt of the first field. The user types the required information, clicks on **[OK]** and then the next prompt is displayed ready for user input.

If you are creating a template, where users create a new document based on that template, interactive fields will run automatically when a new document based on that template is opened. The advantage of this method is that users do not have to know how to work with and recalculate fields. When the document is opened, the prompts will appear automatically for users to complete.





INSERTING A FILLIN FIELD

FILLIN is an interactive field that **prompts** the user for specific types of information to insert into the document. When the user has typed the information and clicks on **[OK]**, the information is

placed in the same location in the document as the **FILLIN** field. Any formatting that has been applied to this location will be automatically applied to the text entered.

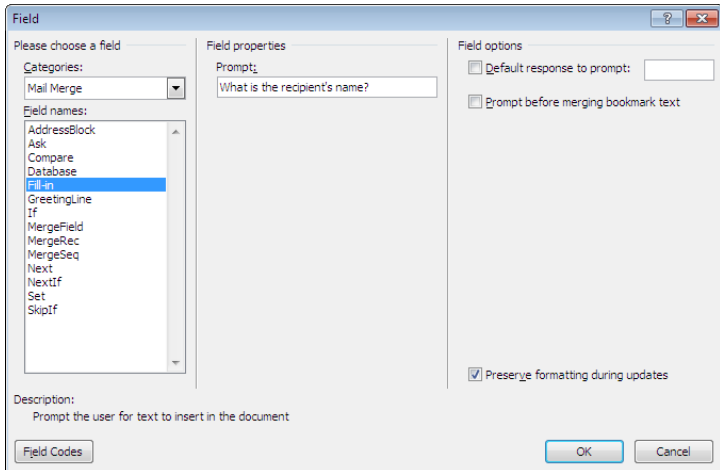
Try This Yourself:

Open File Before starting this exercise you **MUST** open the file *W862 Interactive Fields_1.docx...*

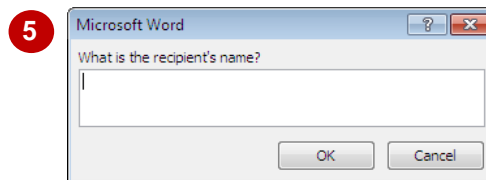
- 1 Click in the empty cell next to **To**. You will insert the **FILLIN** field here...
- 2 Click on **Quick Parts**  on the **Insert** tab and select **Field** to open the **Field** dialog box
- 3 Click on the drop arrow  for **Categories** and select **Mail Merge**
- 4 Click on **Fill-in** then click in **Prompt** and type **What is the recipient's name?**
- 5 Click on **[OK]**
The field will run and you will be asked for the recipient's name...
- 6 Type **Joy Winters** then click on **[OK]**
Her name will be inserted at the cursor (field)...
- 7 Press **Alt + F9** to display the field codes
Notice that the formatting of the field is retained by the MERGEFORMAT switch...
- 8 Press **Alt + F9** again to hide the field codes, then save the document

To:	
Company Name:	

1



4



5

To:	Joy Winters
Company Name:	

6

To:	{ FILLIN "What is the recipient's name?" * MERGEFORMAT }
Company Name:	

7

For Your Reference...

To **insert a FILLIN field**:

1. Position the cursor, then click on the **Insert** tab, click on **Quick Parts** and select **Field**
2. Click on **Mail merge** under **Categories**, then click on **Fill-in** under **Field names**
3. Type a **Prompt** and click on **[OK]**

Handy to Know...

- Initially, the dialog box created by **FILLIN** is empty. From then on it will display the previous value entered. You can specify a different default value (the value shown in the dialog box) for a **FILLIN** field using the switch **ld**. You can even force the text box to appear empty every time by using **ld ""**.

TYPING FIELD CODES INTO A DOCUMENT

Although the **Field** dialog box can be used to paste fields into a document, a proficient operator can type working fields directly into a document without needing to use the ribbon. This can be

quite handy once you are comfortable working with fields and confident using the correct field code syntax. It can certainly save time in developing documents that have multiple fields.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *W862 Interactive Fields_2.docx...*

- 1 Click in the empty cell next to **Company** and press **Ctrl** + **F9** to create a field

This is marked by the appearance of curly brackets in grey shading...

- 2 Type **FILLIN "What is the recipient's company?" * MERGEFORMAT**

MERGEFORMAT preserves the formatting...

- 3 Press **↓** to move to the empty cell next to **Phone** press **Ctrl** + **F9** to create another field

- 4 Type **FILLIN "What is their phone number?" * MERGEFORMAT**

- 5 Repeat steps 3 and 4 to insert a **FILLIN** field that asks for the recipient's fax number

- 6 Press **Alt** + **F9** twice to hide and then display the codes, then save the document

To:	Joy Winters
Company Name:	{ }
Phone:	

1

To:	Joy Winters
Company Name:	{ FILLIN "What is the recipient's company?" *MERGEFORMAT }
Phone:	

2

To:	Joy Winters
Company Name:	{ FILLIN "What is the recipient's company?" *MERGEFORMAT }
Phone:	{ }
Fax:	

3

To:	Joy Winters
Company Name:	{ FILLIN "What is the recipient's company?" *MERGEFORMAT }
Phone:	{ FILLIN "What is the recipient's phone number?" *MERGEFORMAT }
Fax:	

4

To:	Joy Winters
Company Name:	{ FILLIN "What is the recipient's company?" *MERGEFORMAT }
Phone:	{ FILLIN "What is the recipient's phone number?" *MERGEFORMAT }
Fax:	{ FILLIN "What is the recipient's fax number?" *MERGEFORMAT }

5

For Your Reference...

To **type field codes** into a **document**:

1. Position the cursor
2. Press **Ctrl** + **F9**
3. Type the code

Handy to Know...

- For a complete list of fields and their corresponding field properties and switches, go to www.microsoft.com and search for **Word Field Reference**.

ACTIVATING INTERACTIVE FIELDS

Fields are like mini-programs that perform actions. To activate the program, you must **recalculate** the field. Fields can be activated manually so that you can test them or update the

field values. You can activate a single field at a time or select the entire document and activate all of them. When more than one field is updated at a time, they are processed sequentially.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W862 Interactive Fields_3.docx...*

- 1 Make sure the field codes are hidden, then press **Ctrl** + **A** to select the entire document
- 2 Press **F9** to recalculate the fields in the document
The first prompt will appear with Joy Winters as the default text, as this is the last value that was entered...
- 3 Click on **[OK]** to accept **Joy Winters**
The next prompt will be displayed...
- 4 Type **AGE – London** then click on **[OK]**
The phone number prompt will be displayed...
- 5 Type **0011 44 2641 6666**, then click on **[OK]**
The fax number prompt will be displayed...
- 6 Type **0011 44 2641 7777** and click on **[OK]**, then deselect the text
The captured information will be inserted into the relevant fields

1

To:	Joy Winters
Company Name:	
Phone:	
Fax:	

2

Microsoft Word

What is the recipient's name?

Joy Winters

OK Cancel

3

Microsoft Word

What is the recipient's company?

OK Cancel

4

Microsoft Word

What is the recipient's phone number?

OK Cancel

5

Microsoft Word

What is the recipient's fax number?

OK Cancel

6

To:	Joy Winters
Company Name:	AGE - London
Phone:	0011 44 20 2641 6666
Fax:	0011 44 20 2641 7777

For Your Reference...

To **activate interactive fields**:

1. Either click in a field or press **Ctrl** + **A** to select the entire document
2. Press **F9**

Handy to Know...

- If you were to create a template that includes FILLIN fields, and users created a new document based on that template, the prompts would be displayed automatically as the document is opened. Users are therefore not required to understand how to work with fields to use the document.

INSERTING AN ASK FIELD

The **FILLIN** field prompts for information and then inserts it directly into the document. The **ASK** field prompts the user for information, but stores the response in a **bookmark**. The bookmark can

then be used to insert the information in more than one location in the document. This is great for company names or course names – anything that needs to appear several times.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W862 Interactive Fields_4.docx...*

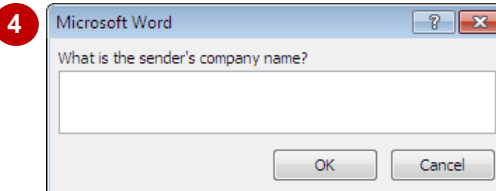
- 1 Click in the empty cell next to **From**
- 2 Press **Ctrl** + **F9** to create the field then type **ASK "Company" "What is the sender's company?"**
"Company" is the name of the bookmark that the value will be stored in, and "What is the sender's company?" is the prompt...
- 3 Press **Alt** + **F9** twice to display and then hide all of the field codes
- 4 Press **F9** to activate the **ASK** field
The dialog box will be displayed...
- 5 Type **AGE - Melbourne** then click on **[OK]**
Nothing appears to have happened, but the company name has been stored in a hidden bookmark...
- 6 Save the document

From:	
Company Name:	
Phone:	
Fax:	

1

From:	{ ASK "Company" "What is the sender's company?" }
Company Name:	

2



4

From:	
Company Name:	
Phone:	
Fax:	

5

For Your Reference...

To **insert** an **ASK** field:

1. Position the cursor
2. Press **Ctrl** + **F9** to create the field
3. Type **ASK** followed by a **"bookmark name"** and **"prompt"**

Handy to Know...

- **ASK** is usually used in partnership with the field code **REF**, which inserts the contents of a bookmark. **ASK** prompts the user to enter specific data, and **REF** inserts that data anywhere in the document where there is a **REF** field that contains that bookmark name, (such as **"Company"**).

USING REF TO DISPLAY BOOKMARKS


The **ASK** field is used to capture input from the user. This input is stored in a bookmark which is hidden in the document. The contents of the bookmark can be displayed using the **REF** field.

This means that the contents of a bookmark can be displayed in more than one location in the document. The **ASK** field should always appear before the **REF** fields in the document.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W862 Interactive Fields_5.docx...*

- 1 Ensure that the insertion point is positioned in the empty cell next to **From**
- 2 Press **End** to make sure that the **REF** field will be inserted after the **ASK** field
- 3 Press **Ctrl** + **F9** to create a field and type **REF "Company"**
- 4 Press **F9** to calculate the field
The value that was stored in the bookmark will be displayed. It can also be used elsewhere in the document...
- 5 Double-click at the bottom of the page to activate the footer and position the cursor, as shown
- 6 Press **Ctrl** + **F9** to create a field and type **REF "Company"**
- 7 Press **F9** to calculate the field
The value stored in the bookmark is now also displayed here...
- 8 Click on **Close**  to close the header and footer, then save the document

From:	{ REF "Company" }
Company Name:	

3

From:	AGE - Melbourne
Company Name:	

4

First Page Footer	<input type="checkbox"/> Urgent	<input type="checkbox"/> For Review	<input type="checkbox"/> Please Comment	<input type="checkbox"/> Please Reply	<input type="checkbox"/> Please Recycle

5

First Page Footer	<input type="checkbox"/> Urgent	<input type="checkbox"/> For Review	<input type="checkbox"/> Please Comment	<input type="checkbox"/> Please Reply	<input type="checkbox"/> Please Recycle
{ REF "Company" }					

6

First Page Footer	<input type="checkbox"/> Urgent	<input type="checkbox"/> For Review	<input type="checkbox"/> Please Comment	<input type="checkbox"/> Please Reply	<input type="checkbox"/> Please Recycle
AGE - Melbourne					

7

For Your Reference...

To **use REF** to **display bookmarks**:

1. Click where you want the contents of the bookmark to appear
2. Press **Ctrl** + **F9** then type **REF "Bookmark Name"**
3. Press **F9** to update the value if necessary

Handy to Know...

- The advantage of using fields and bookmarks is that if a different company name is required, it can now be typed only once and will appear wherever the **REF** field is used.

ACTIVATING FIELDS AUTOMATICALLY

Fields such as **ASK**, **FILLIN** and **REF** are ideal for template documents that are used for standard business documents such as letters, memos, confirmations, reminders, order forms

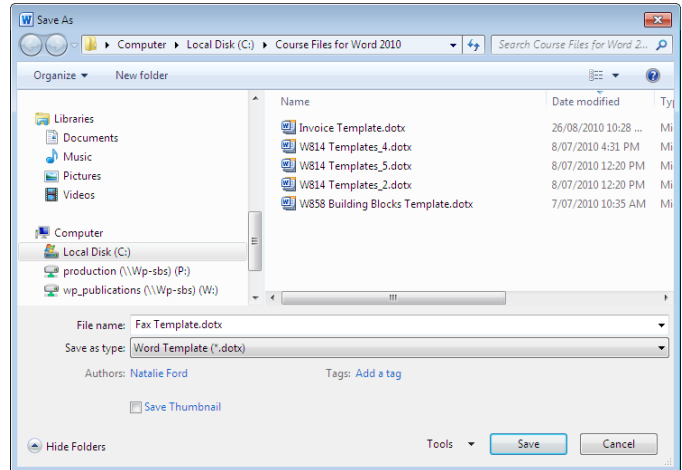
and so on. While fields can be activated manually, you can save the document as a **template**. When a user creates a document based on that template, the fields are activated automatically.

Try This Yourself:

Same File

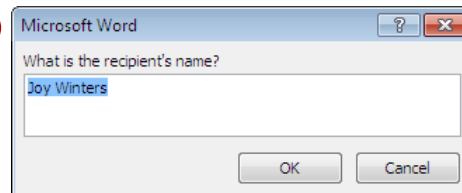
Continue using the previous file with this exercise, or open the file *W862 Interactive Fields_6.docx...*

- 1 Click on the **File** tab, then click on **Save As** to open the **Word Save As** dialog box
- 2 Type **Fax Template** in **File name**, click on the drop arrow for **Files of type** and select **Word Template (*.dotx)**
- 3 Click on **[Save]** then close the template
You will now open the template as a new document...
- 4 Click on **Start > Computer** to open **Windows Explorer**, then navigate to the course files folder
- 5 Double-click on **Fax Template.dotx** to create a new document based on the template
The first prompt will be displayed...
- 6 Type **Fiona Jones** then click on **[OK]**, then complete each prompt with the following data:
Company: AGE - Dubai
Phone: 0011 971 4 560 9999
Fax: 0011 971 4 560 8888
From: AGE - Melbourne
The new information will be inserted into a new document...
- 7 Close the document without saving



2

5



6

To:	Fiona Jones
Company Name:	AGE - Dubai
Phone:	0011 971 4 560 9999
Fax:	0011 971 4 560 8888
From:	AGE - Melbourne

For Your Reference...

To **activate fields automatically**:

1. Click on the **File** tab, then click on **Save As**
2. Type a file name, click on the drop arrow for **Save as type** and select **Word Template (*.dotx)** then click on **[OK]**
3. Open **Windows Explorer**, navigate to and double-click on the template

Handy to Know...

- If you are going to use interactive fields in templates and make them available for other users, make sure you have stored the templates in the appropriate **Templates** folder on the network.