

Fields enable the automatic input of certain types of data into a document. Fields are commonly used to display dynamic information and information that is subject to change, such as the last print date of a document, the document's file name and path, or a formula total, for example. Fields can be used to automate common tasks, and to display up-to-date document information.

In this session you will:

- ✓ gain an understanding of fields
- ✓ gain an understanding of the **Field** dialog box
- ✓ learn how to insert document information fields
- ✓ learn how to set field properties
- ✓ learn how to show and hide field codes
- ✓ learn how to display field shading
- ✓ learn how to insert formula fields
- ✓ learn how to insert and format a date and time field
- ✓ learn how to update fields automatically before printing
- ✓ learn how to lock and unlock fields
- ✓ learn how to apply a number format.

UNDERSTANDING FIELDS

Fields enable you to quickly insert and update certain types of data in your document. This data is generally information that is subject to change, such as the author's name or the last save date,

or a formula total. The field acts like a placeholder for that data, and contains a code that tells Word what type of data to insert. There are many different types of fields available.

What Is A Field?

Fields are used to display up-to-date document information, such as the name of the last person who worked on the document, or the last time a document was saved, and where it's saved now. Fields can be used to automate processes and tasks, such as automating page numbering, as well as to automatically update the document with key information, such as your name.

You can insert fields anywhere in a document, and they are useful in organisational templates and forms, particularly where multiple people use the same business documents.

To update field data and display the latest information, click in the field and press F9.

Field Codes

Each field acts as a **placeholder** for certain types of data, and contains a **code** that instructs Word *what* type of data to insert. A field code is made up of the following syntax:

```
{ FIELDNAME "Properties" \*SWITCHES }
```

Where:

- **FIELDNAME** is the **Field name**, such as **Numwords** or **Date**.
- **"Properties"** and ***SWITCHES** are the field properties that you can set for a field type. Each field type will contain properties that are relevant to that field type.

Types Of Field Properties

Field properties include the following.

- **Formatting controls:** allows you to specify the format of field data, such as the date or the numbering format, as well as capitalisation. These formatting controls are referred to as **SWITCHES**.
- **Prompts:** used to insert the text that will prompt users for specific information when using prompting fields (such as the **Fill-In** or **Ask** fields).
- **Text**, such as **Name**, **Value** and **Comment** fields that enable you to type the required name or value. This therefore becomes a manual field entry and overrides automatic updating.

You can view and hide the field codes by pressing Alt + F9.

The Fields Dialog Box

The complete list of fields available in Word is located in the **Fields** dialog box. To open the **Fields** dialog box, click on the **Insert** tab, then click on **Quick Parts** in the **Text** group and select **Field**. Here you can insert and modify fields, as well as view and hide field codes. You can also set field properties and the format (switches).

The Difference Between Fields And Content Controls

As well as fields there are also **content controls**. A content control displays field information for certain types of **document information fields** but in a different format. When a user clicks on data contained in a content control, the data is displayed in a **data input field**, with the field name displayed in a **label**. Content controls can make it easier for users to work with fields, as they guide the user as to what they need to type in a particular field. Content controls are useful for forms or any business documents that contain **document information fields**.

You can insert content controls by clicking on the **Insert** tab, then clicking on **Quick Parts** and selecting **Document Property** to view a list of available content controls.

THE FIELD DIALOG BOX

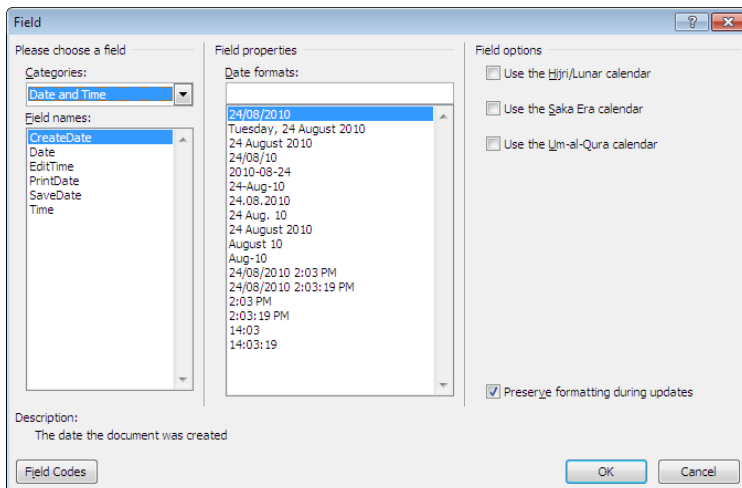
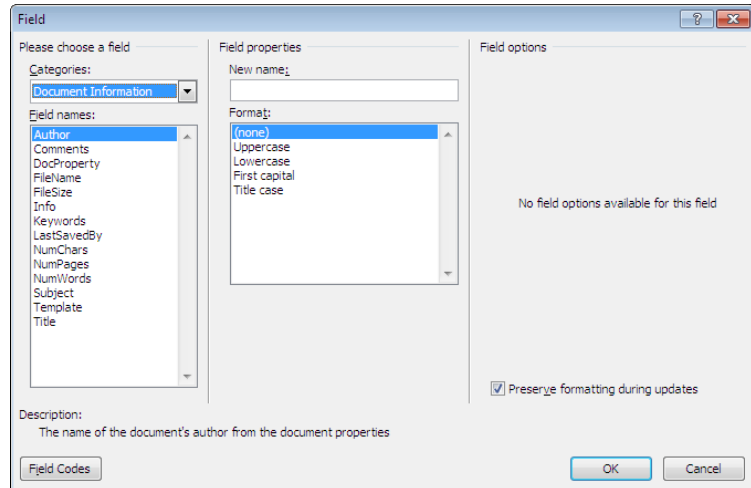
You can create and work with **fields** and field **properties** in the **Field** dialog box. The **Field** dialog box enables you to set properties and options for all available field types (**Field names**).

The **Properties** and **Options** available for a field depend on the field type. Formatting properties may be available for one field type but may not be applicable to another field type.

The Field Dialog Box

The left side of the **Field** dialog box displays the available fields (**Field names**) for each **Category**. When you click on a field in **Field name**, the right side of the dialog box will display applicable **Properties** and **Options**. A brief description of the **Field name** will also appear along the bottom of the dialog box.

The picture to the right shows the available **Properties** and **Options** for the **Author** field, such as the **Format** and **New name**.



Field Properties And Options

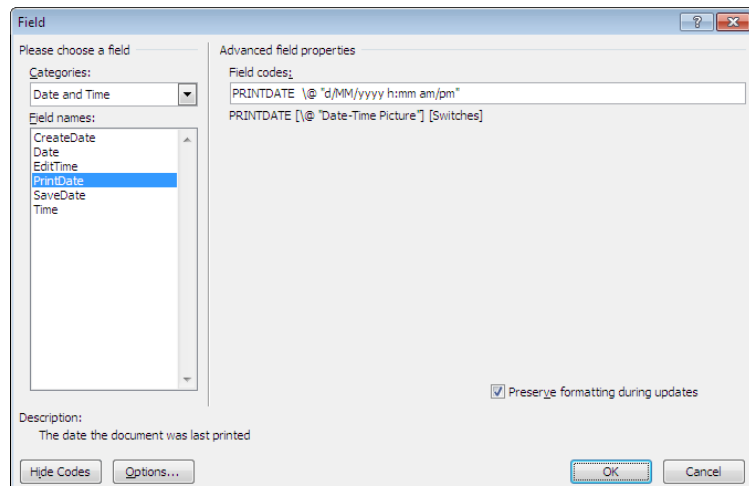
Each field type will have properties and options that are relevant to that field.

Not all field codes have properties and options, but in the picture to the left, **CreateDate**, has both. You can select from a range of standard **Date formats**, or type your own, and/or select a **Field option**.

Showing Field Codes

Click on **[Field Codes]** to display the field codes for the selected field. This is an alternative way to view and edit field codes. For example, you might prefer to modify the code itself rather than selecting a format. Or, you may need to check the code if the field doesn't run as it should.

Click on **[Hide Codes]** to return to the default **Field properties** view.



INSERTING A DOCUMENT INFORMATION FIELD


Some of the most useful **fields** available can help you keep up-to-date with information about the document, such as the file name, creation date and the like. **Document information** fields are


useful in standard business documents, where the content remains the same, but information about the document, such as its location, print status, author and so on, changes depending on the user.


Try This Yourself:

Open File


Before starting this exercise you **MUST** open the file *W861 Fields_1.docx...*

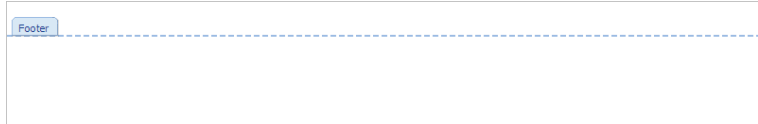
1 Click on the **Insert** tab, then click on **Footer**  in the **Header & Footer** group and select **Edit Footer** to make the footer active

2 Click on **Quick Parts**  in the **Insert** group and select **Field** to open the **Field** dialog box

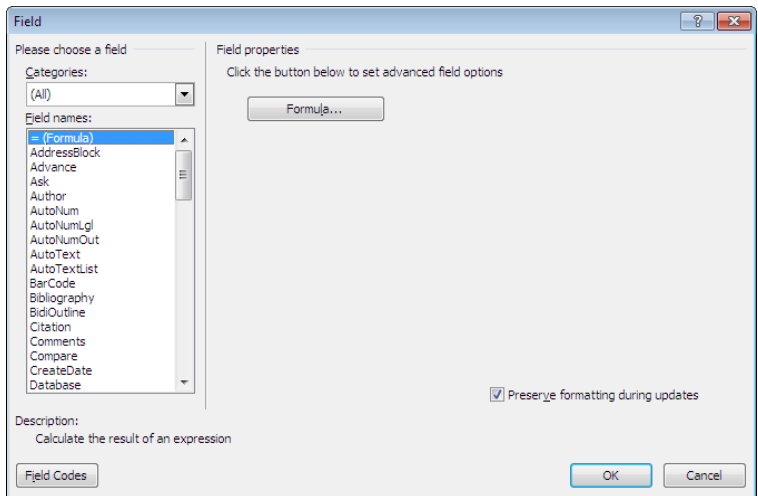
3 Click on the drop arrow  for **Categories** and select **Document Information**, then click on **FileName** for **Field names** and click on **[OK]**

The field will be inserted into the footer at the insertion point and display the file name...

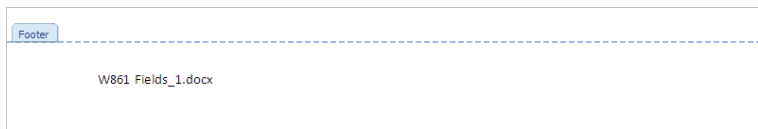
4 Click on **Close Header and Footer**  in the **Close** group and then save the document



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For Your Reference...

To **insert** a **document information field**:

1. Position the cursor, click on **Quick Parts**  on the **Insert** tab and select **Field**
2. Click on the drop arrow  for **Category** and select **Document Information**, then click on a **Field name** to select it
3. Set the desired **properties** and click on **[OK]**

Handy to Know...

- You can insert **content controls** for **document information fields** instead of the default fields. To do this, position the cursor, click on the **Insert** tab, click on **Quick Parts**  in the **Text** group and select **Fields**, then select **Document Property** and select a **document information field** to insert.




SETTING FIELD PROPERTIES

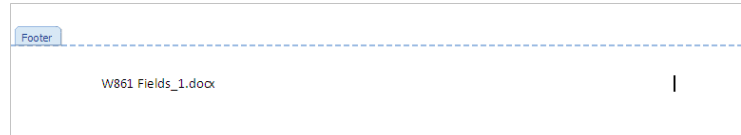
Each field type contains a range of **field properties** that you can set to control the format of the data, as well the data that appears in the field. These field properties include **switches**, to

control formatting and capitalisation, as well **text** fields for inserting specific data or values. For example, you might want to ensure that only your name only ever appears in the **Author** field.

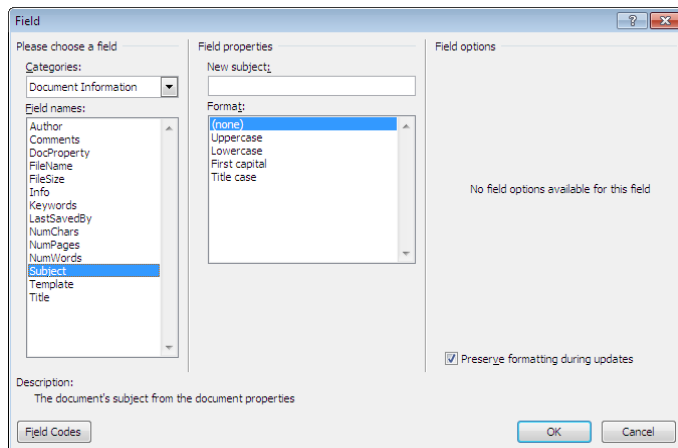
Try This Yourself:

Open File Before starting this exercise you **MUST** open the file *W861 Fields_2.docx...*

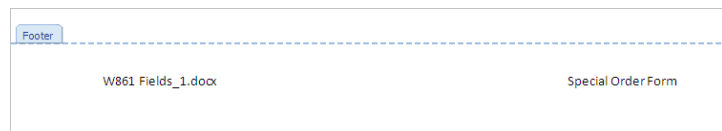
- 1 Click on the **Insert** tab, then click on **Footer**  in the **Header & Footer** group and select **Edit Footer**, or double-click on the footer area to make the footer active
- 2 Click at the end of the file name, then press **[Tab]** twice to position the cursor at the right margin
- 3 Click on **Quick Parts**  in the **Insert** group and select **Field** to open the **Field** dialog box
- 4 Ensure that **Document Information** is selected for **Categories**, then click on **Subject** for **Field names**
- 5 Type **Special Order Form** for **New subject**, then click on **[OK]**
The Subject text will be inserted according to the field properties you set, and the field data will not update until you change the field properties...
- 6 Click on **Close Header and Footer**  in the **Close** group and then save the document



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For Your Reference...

To **set field properties**:

1. Position the cursor, click on the **Insert** tab, click on **Quick Parts**  and select **Field**
2. Select the field **Category** and **Name**
3. Set the **field properties** as required, then click on **[OK]**

Handy to Know...

- To update or set field properties for an existing field, right-click on the field and select **Edit Field**. Set or modify the required field properties in the **Fields** dialog box, then click on **[OK]**.

SHOWING AND HIDING FIELD CODES

When you insert a field into the document, the resultant data is displayed in the field by default, and the **field code** is hidden from view. You can view the field code instead of the data, that is,

switch between viewing the data and viewing the field code. You can do this if you need to, for example, modify the field code or examine the syntax.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W861 Fields_3.docx...*

1

Make sure you can see the footer information

By default the field data is displayed...

2

Press **Alt** + **F9**

The field codes will be displayed...

3

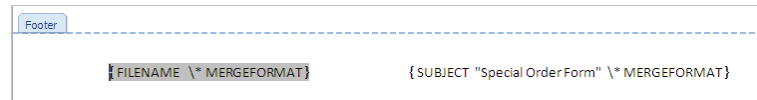
Press **Alt** + **F9** again to hide the codes and display the field data

4

Save the document



1



2

For Your Reference...

To **show/hide field codes**:

1. Press **Alt** + **F9**

Handy to Know...

- *** MERGEFORMAT** is a default property setting that preserves the formatting during updates. This means that any formatting that has been manually changed or lost will be restored when the field is updated.

SHOWING AND HIDING FIELD SHADING


For users of your document who may not be familiar with fields and how they work, it may be difficult to know where fields are located in a document. This is because the field **data** is

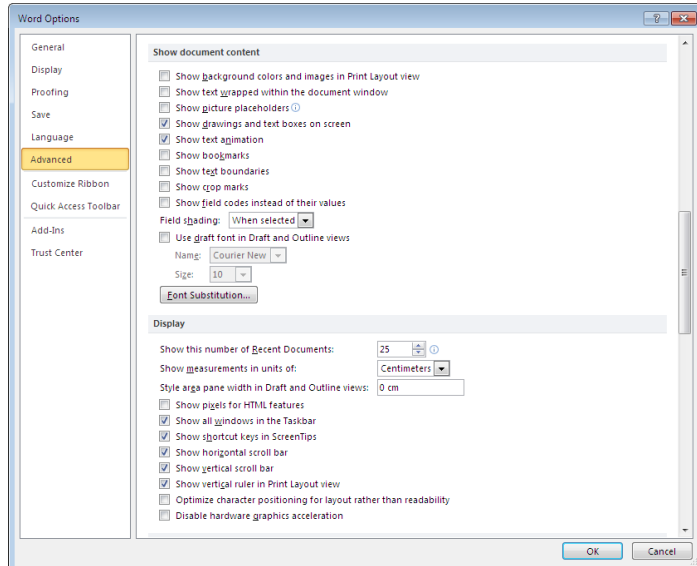
displayed by default. To make it easier for document users to work with fields, you can display the **field shading** in the document, so users know exactly where the fields are located.

Try This Yourself:

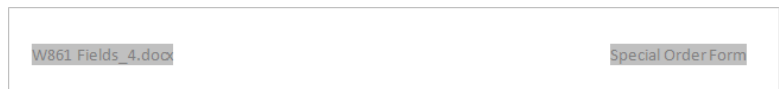
Open File

Before starting this exercise you MUST open the file W861 Fields_4.docx...

- 1 Make sure you can see the footer information
By default, the field data is displayed, but unless you understand fields it may be difficult to know whether this has been typed in manually or whether the data is contained in a field...
- 2 Click on the **File** tab, then click on **Options** to open the **Word Options** dialog box
- 3 Click on **Advanced** in the left panel and navigate to the **Show document content** section
The default field shading setting is When selected...
- 4 Click on the drop arrow  for **Field shading** and select **Always**, then click on **[OK]**
The field data will now have grey shading applied...
- 5 Repeat steps 2 to 4 to change the **Field shading** setting to **When selected**
- 6 Save the document




3



4

For Your Reference...

To **display field shading**:

1. Click on the **File** tab, then click on **Options**
2. Click on **Advanced** and navigate to the **Show document content** section
3. Click on the drop arrow  for **Field shading** and click on **Always**, then click on **[OK]**

Handy to Know...

- The default **Field shading** setting is **When selected**. This displays the shading only when you click in the field, but remains otherwise hidden.
- **Field shading** will remain on for all documents until it is turned off in the **Word Options** dialog box.

INSERTING FORMULA FIELDS




Formula fields allow you to perform calculations in a document. Formula fields are often used to calculate a series of numbers in a table, such as in invoices and the like. When using a formula

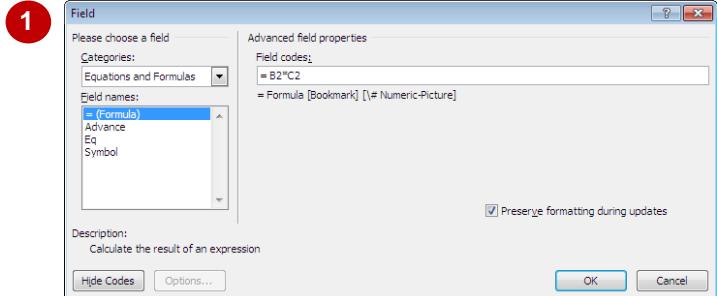
field, the formula must start with an equal sign (=) and refer to the particular cells in the table that contain the values to include in the formula.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W861 Fields_5.docx...*

- 1 Click in the first empty cell (below **Total**) in the table, click on the **Insert** tab, then click on **Quick Parts**  and select **Field** to open the **Field** dialog box
- 2 Click on the drop arrow  for **Categories** and select **Equations and Formulas**
You will insert a formula that multiplies the Quantity in cell B2 by the Unit price in cell C2...
- 3 Ensure **= (Formula)** is selected in **Field names**, click on **[Field Codes]** to display the field codes, then click after the equal sign in **Field codes** and type **B2*C2**
- 4 Click on **[OK]** to insert the field
The formula result is displayed in the field...
- 5 Press  to move down one cell and repeat steps 2 to 6 to insert formula fields for the remaining four items, as shown
- 6 Click in the last **Total** cell then repeat steps 2 and 3, then click on **[Formula]** to display the function **=SUM(ABOVE)**
- 7 Click on **[OK]** to insert the formula field

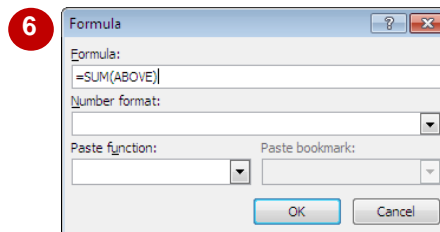


4

Item	Quantity	Unit Price	Total
Global Roamer 514	500	237.80	118900
Global Roamer 517	50	812.50	

5

Item	Quantity	Unit Price	Total
Global Roamer 514	500	237.80	118900
Global Roamer 517	50	812.50	40625
World Communicator 223	500	234.50	117250
Broadband 15	50	342.50	17125
Broadband 16	20	443.50	8870
Total			





7

Item	Quantity	Unit Price	Total
Global Roamer 514	500	237.80	118900
Global Roamer 517	50	812.50	40625
World Communicator 223	500	234.50	117250
Broadband 15	50	342.50	17125
Broadband 16	20	443.50	8870
Total			302770

For Your Reference...

To **insert formula fields**:

1. Position the cursor, click on the **Insert** tab, click on **Quick Parts**  and select **Field**
2. Click on the drop arrow  for **Categories** and select **Equations and Formulas**
3. Click on **= (Formula)** and then click on **[Field Codes]**, type the formula then click on **[OK]**

Handy to Know...

- When you want to insert the same formula field in several cells, you can copy and paste the formula field instead of opening the **Fields** dialog box, then press **[Alt] + [F9]** to edit the fields with the new cell references. Then press **[F9]** to recalculate the field with the updated cell references.





INSERTING A DATE AND TIME FIELD

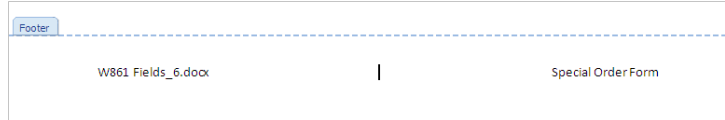
The **Date and Time** field category contains several field types that will insert the last date a particular action was performed, such as the last date and time a document was **saved** or **printed**.

Inserting the last **print date** can be helpful, as it can help to establish the most recent version of a document. You may also be required to use date and time fields to meet document requirements.

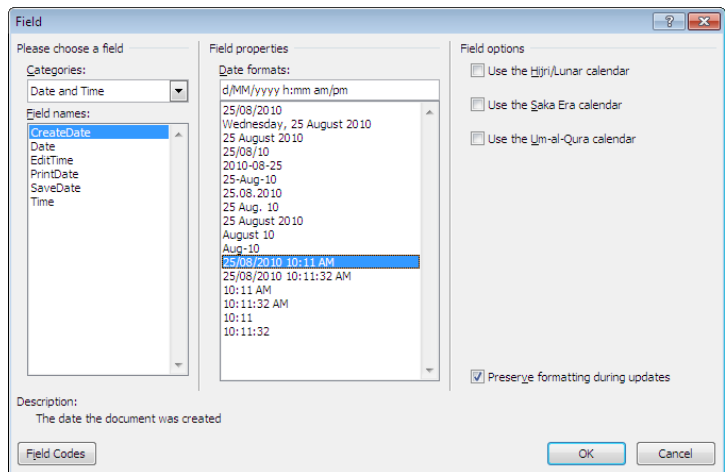
Try This Yourself:

Open File Before starting this exercise you **MUST** open the file *W861 Fields_6.docx...*

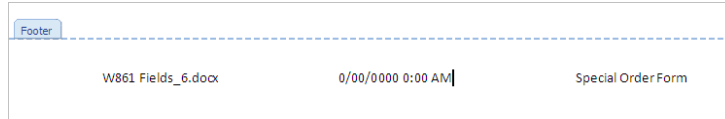
- 1 Click on the **Insert** tab, then click on **Footer**  in the **Header & Footer** group and select **Edit Footer**, or double-click on the footer area to make the footer active
- 2 Click in the centre of the footer to position the cursor, as shown
- 3 Click on **Quick Parts**  in the **Insert** group and select **Field** to open the **Field** dialog box
- 4 Click on the drop arrow  for **Categories** and select **Date and Time**, then click on **PrintDate** for **Field names**, then click on the **Date format** as shown to select it
- 5 Click on **[OK]**
If the document has not yet been printed, the format will be displayed but with zero values...
- 6 Print the document, then right-click on the field and press **F9** to update it
The print date should now appear in the field...
- 7 Click on **Close Header and Footer**  in the **Close** group and then save the document



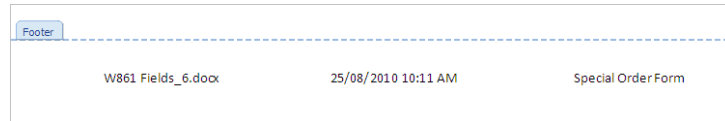
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For Your Reference...

- To insert a **date and time field**:
1. Position the cursor, click on the **Insert** tab, then click on **Quick Parts**  and select **Field**
 2. Click on the drop arrow  for **Category** and select **Date and Time**, then click on a **Field name** to select it
 3. Set desired **properties** and click on **[OK]**

Handy to Know...

- As well as setting **Field properties**, you can also set **Field options** for relevant field types. Field options provide further or more advanced settings for applicable field types. Make sure you view the **Field options** when working with fields in the **Fields** dialog box, as they may prove useful.

UPDATING FIELDS AUTOMATICALLY WHEN PRINTING

You can update fields in a document manually as information changes, but it is probably most important to have the most up-to-date information on a printed copy of the document. Word

provides an option that enables fields to be updated automatically just before the document is printed. This option is turned off by default. In this exercise you will turn the option on.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W861 Fields_7.docx...*

- 1 Click on the **File** tab, then click on **Options** to open the **Word Options** dialog box

The **Printing options** are located in the **Display options...**

- 2 Click on **Display** in the left pane, then click on **Update fields before printing** in **Printing options** so that it appears with a tick


- 3 Click on **[OK]** to apply the settings and then navigate to the footer

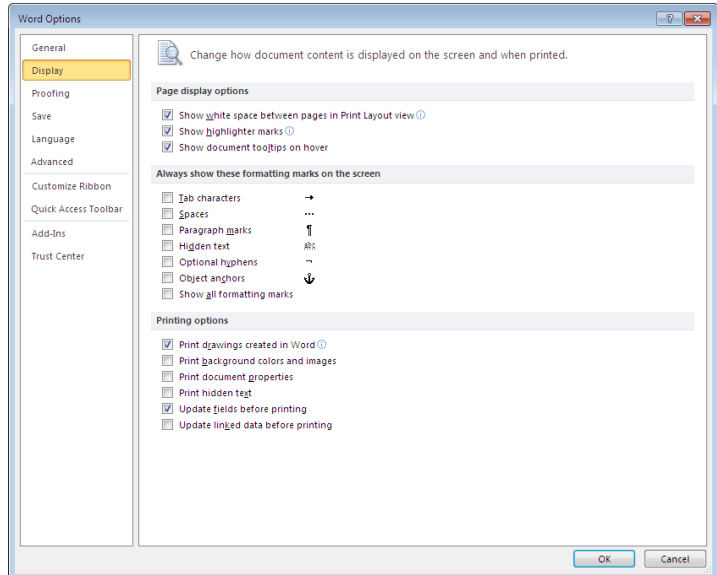
- 4 Save the document as **Field Print Test.docx** in the course files folder

The previous file name still appears in the footer. You will now test this option by updating (changing) the information in the **FileName** field...

- 5 Press **Ctrl + P** to print preview the document and then press **Enter** to print the document

The **FileName** field (located on the left of the footer) will now have the new file name displayed...

- 6 Click on **Close Header and Footer**  in the **Close** group and then save the document



2

W861 Fields_7.docx	25/08/2010 10:20 AM	Special Order Form
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4

Field Print Test.docx	25/08/2010 10:23 AM	Special Order Form
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5

For Your Reference...

To **update fields automatically when printing**:

1. Click on the **File** tab, then click on **Options** and click on **Display**
2. Ensure that **Update fields before printing** appears with a tick
3. Click on **[OK]**

Handy to Know...

- Other **printing options** for fields include being able to **print the field codes** instead of the field data. To do this, open the **Word Options** dialog box, click on **Advanced** and then click on **Print field codes instead of their values**. Click on **[OK]** to apply as a global change. Repeat these steps to undo.

LOCKING AND UNLOCKING FIELDS

A **field** contains a code that instructs Word to insert specific types of data. As this data changes it is updated regularly to reflect these changes. However, you may want to **lock** the field so that

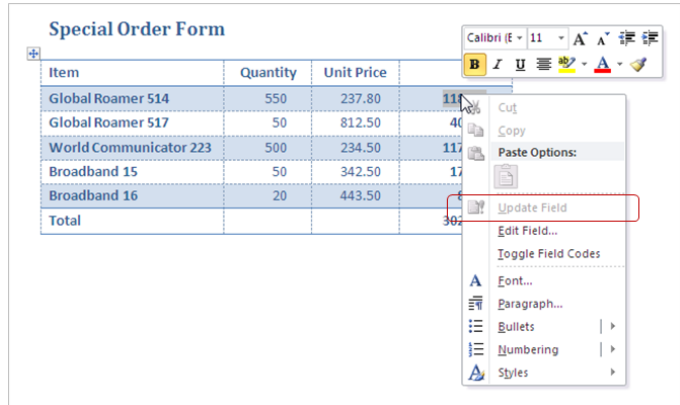
the data will remain static, and will not update until you **unlock** the field. Locking fields might be useful where you want specific values or data to remain fixed, such as your name.

Try This Yourself:

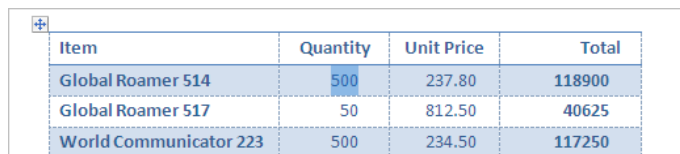
Open File

Before starting this exercise you **MUST** open the file *W861 Fields_7.docx...*

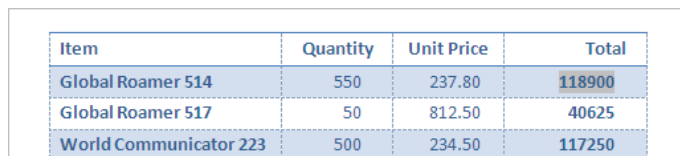
- 1 Click on the value in the **Total** cell for the **Global Roamer 514** to activate the field, then press **Ctrl** + **F11** to lock the field
The field will now be locked. You will check to make sure...
- 2 Right-click on the field to display a shortcut menu
The Update Field option should be unavailable, which means the field is locked...
- 3 Press **Esc** to hide the shortcut menu, then double-click on **500** in the **Quantity** cell for the **Global Roamer 514** to select the text
The client is receiving 50 bonus units, so you will adjust the quantity but not the total...
- 4 Type **550** then click on the value in the **Total** cell for the **Global Roamer 514** again and press **F9** to update the field
The field will not update as it is locked. You will now unlock the field to see how this feature works, then update the field...
- 5 Click in the **Total** cell and press **Ctrl** + **Shift** + **F11** to unlock the field, then press **F9** to update the field data



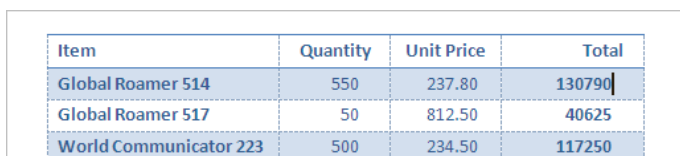
2



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For Your Reference...

To **lock** a field:

1. Click in the field and press **Ctrl** + **F11**

To **unlock** a field:

1. Click in the field and press **Ctrl** + **Shift** + **F11**

Handy to Know...

- Alternatively, you can convert the field data into normal text so it can no longer be updated automatically. Press **Ctrl** + **Shift** + **F9** to do this.

APPLYING A NUMBER FORMAT

Many field types contain **properties** to control the format and appearance of field data, such as the date or number format, or the capitalisation rules applied to text. These formatting properties

appear as **switches** in the field code. For most of your formatting needs, you can set the required properties in the **Fields** dialog box. Here you will apply a number format to **formula fields**.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W861 Fields_8.docx...*

1 Right-click on the field that displays the total **308830** and select **Edit Field** to open the **Fields** dialog box

You will edit the field properties for the formula by applying a number format...

2 Click on **[Formula]** to display the **Formula** dialog box

3 Click on the drop arrow for **Number format** and select **##,##0.00;(\$#,##0.00)**, then edit the format to appear as **##,##0;(\$#,##0)**

4 Click on **[OK]** to apply the format to the field data

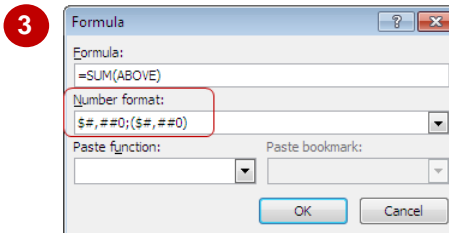
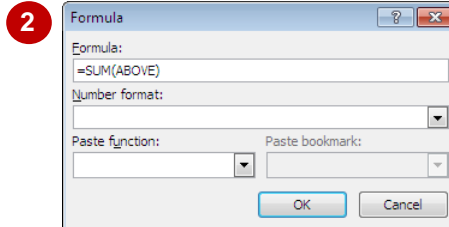
5 Press **[Alt] + [F9]** to display the field codes

The code is updated to include the format switch for the applied number formatting...

6 Press **[Alt] + [F9]** to display the field data

7 Repeat steps **2** to **4** to apply the **Number format ##,##0** to the **Total** of each item, as shown

8 Save and close the document



4

Broadband 16	20	443.50	8870
Total			\$314,660

5

Broadband 16	20	443.50	{ = B6* C6 * MERGEFORMAT }
Total			{ =SUM(ABOVE) * \# "##,##0;(\$#,##0)" }

7

Special Order Form

Item	Quantity	Unit Price	Total
Global Roamer 514	550	237.80	130,790
Global Roamer 517	50	812.50	40,625
World Communicator 223	500	234.50	117,250
Broadband 15	50	342.50	17,125
Broadband 16	20	443.50	8,870
Total			\$314,660

For Your Reference...

To **apply a number format**:

1. Right-click on the field and select **Edit Field**
2. Select an applicable **Format** in **Field Properties**
3. Edit if required, then click on **[OK]**

Handy to Know...

- In this exercise you could have copied the field and field code to other fields and then update the cell references accordingly. To do this, you could simply copy the field that contains the correct code, then paste into the new cell, reveal the codes and then update the code with the correct cell references.