

Using Fields, Forms, and Indexes

Lesson Skill Matrix

Skill	Exam Objective	Objective Number
Working with Fields	Add custom fields.	3.3.1
	Modify field properties.	3.3.2
Working with Forms	Insert and configure content controls.	4.1.4
	Display hidden ribbon tabs.	1.1.7
Creating Indexes	Mark index entries.	3.1.1
	Create indexes.	3.1.2
	Update indexes.	3.1.3

Working with Fields

A field is a code that is used to display variable information. When you update the field, if the data on which it is based has changed, the field updates too. One example of a field is an automatically updating date or time code that changes to the current date and time whenever the field updates.

Understanding Fields

Fields operate behind the scenes in many different contexts in Word. You have worked with fields in some exercises in this book already, perhaps without realizing it. For example, when you create a table of contents, a bookmark, or a figure caption, you are working with a field. Table 6-1 lists some fields and the Word commands that create them.

Field	Purpose	Tab/Command
{Bookmark}	Creates a bookmark	Insert, Bookmark
{Date}	Creates an automatically updating date	Insert, Insert Date and Time
{Hyperlink}	Inserts a hyperlink	Insert, Hyperlink
{NoteRef}	Inserts a footnote number	References, Insert Footnote
{Page}	Inserts a page numbering code	Insert, Page Number
{TOC}	Inserts a table of contents	References, Table of

Table 6-1

Examples of How Fields are Used in Word

There are many kinds of fields. As you learn in Lesson 7, mail merges insert merge fields, which are fields that pull certain data from the source document, such as names and addresses. You can also insert a variety of fields that describe your document, such as the user name, user initials, file name, and so on.

The field codes themselves do not display in the document by default; instead, the result of the field codes display. When you toggle on the display of the field codes, however, the fields appear in curly braces, like this: {Date}. Each field has a default format that's used if the code appears by itself.

When you customize a field, you add switches to the field code that change the way it behaves. A switch is a property or argument that changes the code's behavior. Dialog box settings for features that insert a field code, such as Bookmark or Date, determine the switches that the field uses. For example, to display the current date in a format like August 5, 1964, you would use the following field code:

```
{DATE \@ "MMMM d, yyyy"}
```

Inserting Fields

You can insert fields in a document either by using a command that creates a field code as part of its operation or by using the Field command. You practice both methods in the following exercise.

When you insert a field, you can customize it by changing the properties in the Field dialog box. You can also edit the field's properties to customize the field.

Step by step Insert Fields

GET READY. LAUNCH Microsoft Word. **OPEN** the **Tech Terrace letter** document from the lesson folder.

1. On the Home tab, in the Paragraph group, click the **Show/Hide** button to display formatting symbols.
2. Delete the date at the top of the document. (Do not delete the paragraph mark.) Position the insertion point at the beginning of the document.
3. On the Insert tab, in the Text group, click the **Insert Date and Time** button. The *Date and Time* dialog box appears (see Figure 6-1).

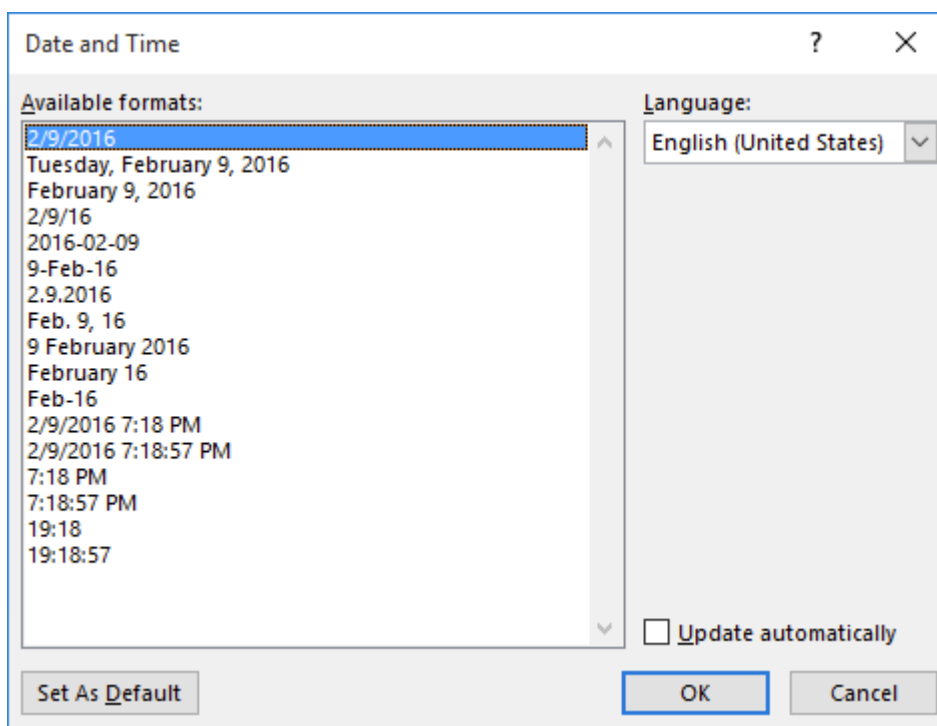


Figure 6-1
Date and Time dialog box

4. In the Available formats list, select the date format that includes the day of the week (Monday, Tuesday, and so on).
5. Select the **Update automatically** checkbox.
6. Click **OK**. The current date appears on the document.
7. Position the insertion point two lines below the *Sincerely* line.
8. Delete the signer's name. (Do not delete the paragraph mark.)

9. On the Insert tab, in the Text group, click [Explore Quick Parts](#) and then click [Field](#). The *Field* dialog box appears.
10. In the Field names list, select [UserName](#).
11. In the Format list, click [Title case](#). See Figure 6-2.

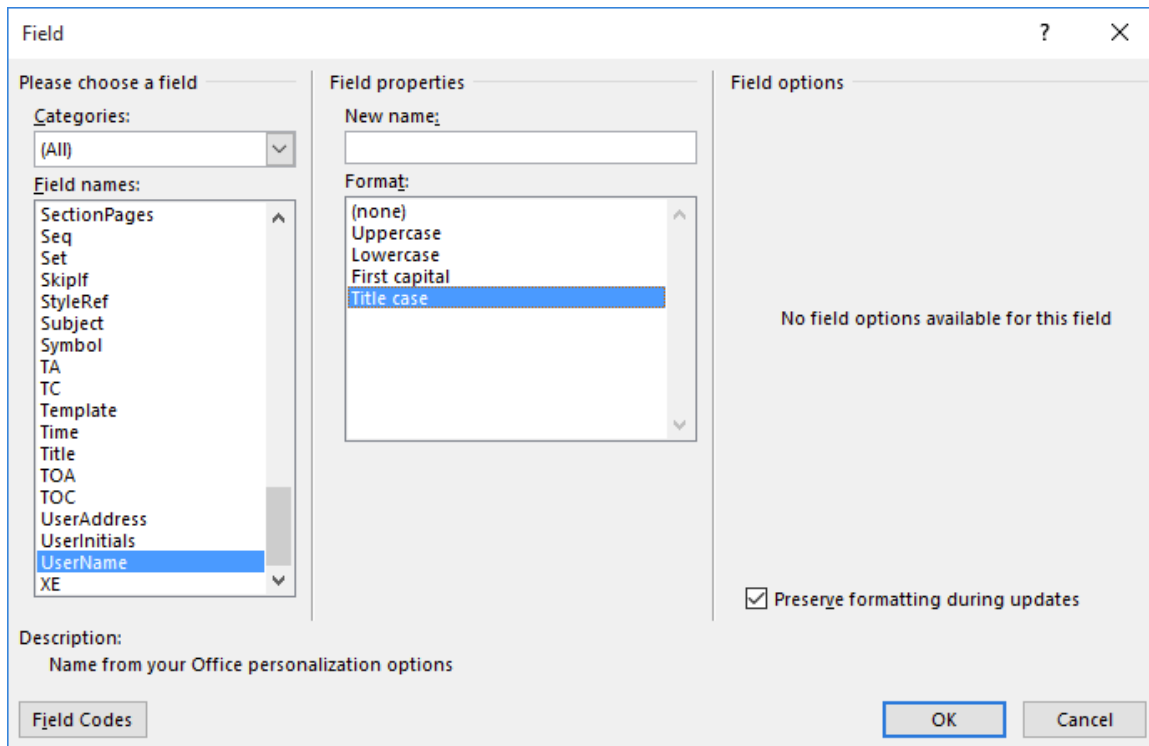


Figure 6-2
Field dialog box for a text field

12. Click [OK](#). The active user name appears in the document.

Take Note

The user name comes from the name that is set on the Word Options dialog box. To change that name, click the File tab, click Options, and then change the name in the User name box.

13. Right-click the user name in the document and, on the context menu, select [Toggle Field Codes](#). The field code appears as follows:
{ USERNAME * Caps * MERGEFORMAT }
14. Right-click the field code and, on the context menu, select [Edit Field](#). The *Field* dialog box appears again.
15. In the Format list, select [Uppercase](#) and then click [OK](#). The name now appears in uppercase in the document.
16. [SAVE](#) the document as [Tech Terrace fields](#) in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note

If you know exactly what you want for your field code and its syntax, you can press **Ctrl+F9** to insert a blank field code, complete with an empty set of curly braces, directly into the document. You can then type in the desired field code and any special syntax required to format it. Field names are not case-sensitive. If a property contains spaces, you must enclose that property in quotation marks. Leave one space between the field name and each property or switch. Leave one space between the backslash (\) of a switch and its parameter. Leave one blank space to the right of the left curly brace and one blank space to the left of the right curly brace.

Customizing Field Formats

You can customize a field in a variety of ways. As you saw in the previous exercise, you can use the properties in the Field dialog box to assign switches and other arguments to a field code. You can set Text fields to Uppercase, Lowercase, First capital, or Title case. For numeric fields, you can assign a specific numbering format, such as 1, 2, 3 or A, B, C.

You can also manually edit a field's code to customize it. You do this by toggling on the display of the field code and then editing the code string in the document, or by clicking the Field Codes button in the Field dialog box and editing the code there. In the following exercise, you will practice both methods of customizing a field code.

Step by step Customize Field Codes

GET READY. USE the **Tech Terrace fields** document that is open from the previous exercise.

1. Right-click the date and, on the context menu, select **Edit Field**. The *Field* dialog box appears.
2. In the Date formats list, click the format that appears like this: **July 7, 2016**.
3. Click **OK** to accept the new format.
4. Double-click at the bottom of the page to open the document footer.
5. Type **Rev.** and then press the **spacebar** once.
6. On the Insert tab, click **Explore Quick Parts** and then click **Field**.
7. In the *Field* dialog box, in the **Categories** list, select **Numbering**.
8. In the Field names list, select **RevNum**.
9. In the Format list, select **A, B, C**.
10. In the Numeric format list, select **0**. See Figure 6-3.

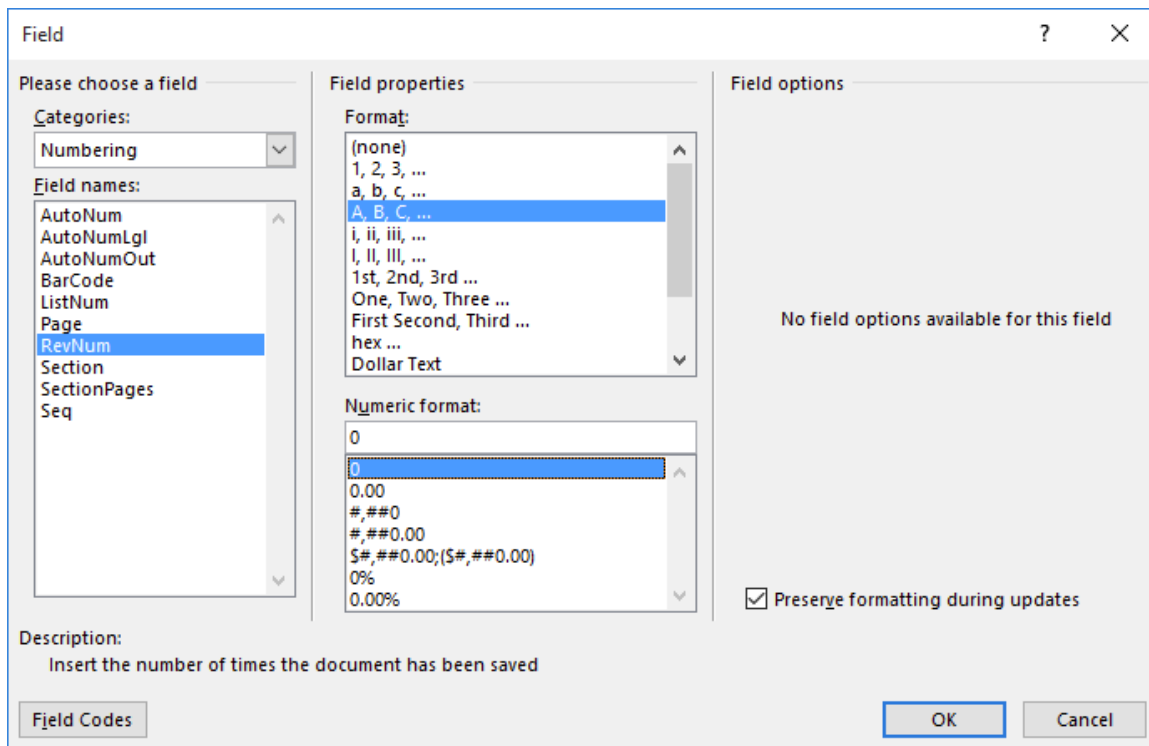


Figure 6-3
Field dialog box for a numeric field

11. Click the **Field Codes** button. The Advanced field properties pane appears.
12. Examine the code that appears in the Field codes box. The word *ALPHABETIC* appears in all caps.
13. Edit the code so that the word **alphabetic** appears in all lowercase.
14. Click **OK**. The revision number (a lowercase letter) appears in the footer.
15. Double-click in the main part of the document to close the footer.
16. **SAVE** the document as **Tech Terrace fields 2** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Creating and Using Custom Fields

A document's properties include several standard fields, such as Author, Title, and Subject. You can use the same methods to insert these fields into the document as you did with the user name field in the previous exercise. You can also create custom fields in the document's properties, and insert the custom fields' content into the document.

In the following exercise, you will create a custom field called Division and then insert it in the document.

Step by step **Create and Use Custom Fields**

GET READY. USE the document that is open from the previous exercise.

1. Click the **File** tab and then, on the backstage Info page, click the down arrow next to **Properties** to open a menu.
2. Click **Advanced Properties**. The *Properties* dialog box for the active document

appears.

3. Click the [Custom](#) tab.
4. In the Name list, select [Division](#).
5. In the Value box, type [Midwest](#). See Figure 6-4.

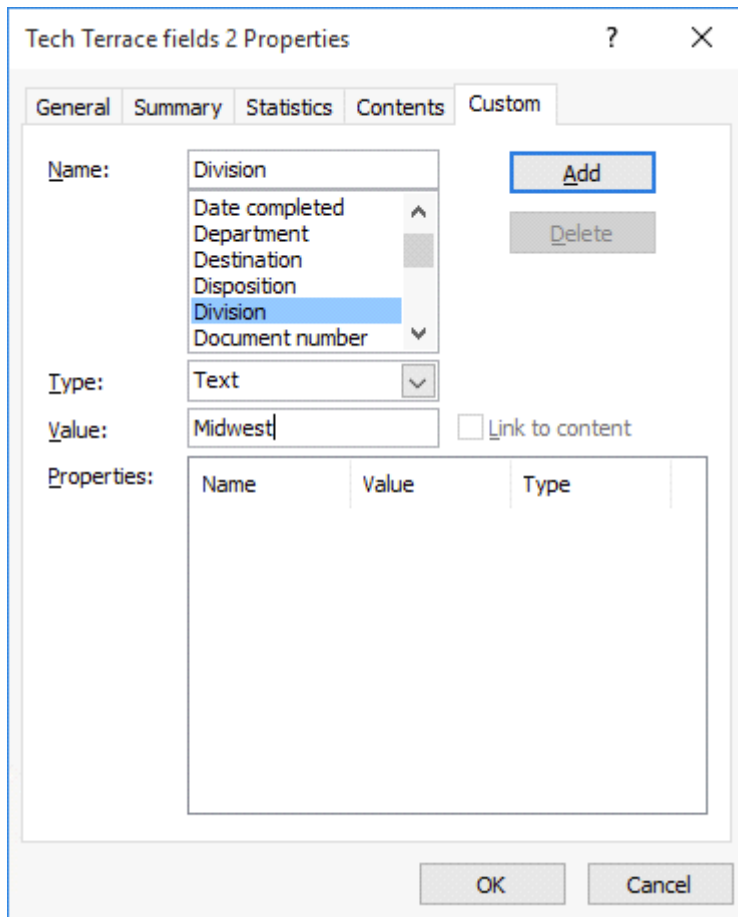


Figure 6-4
Creating a custom field

6. Click [Add](#) and then the new division property appears in the Properties list.
7. Click [OK](#) to close the *Properties* dialog box. Press [Esc](#) to return to the document.
8. After the name on the last line of the document, press [Shift+Enter](#) to start a new line.
9. On the Insert tab, in the Text group, click [Explore Quick Parts](#) and then click [Field](#). The *Field* dialog box appears.
10. In the [Categories](#) drop-down list, choose [Document Information](#).
11. In the Field names list, click [DocProperty](#).
12. In the Property list, click [Division](#). See Figure 6-5.
13. Click [OK](#). The word *Midwest* appears in the document.
14. Press the [spacebar](#) once and then type [Division](#).
15. [SAVE](#) the document as [Tech Terrace fields 3](#) in the lesson folder on your flash drive and then [CLOSE](#) the file.

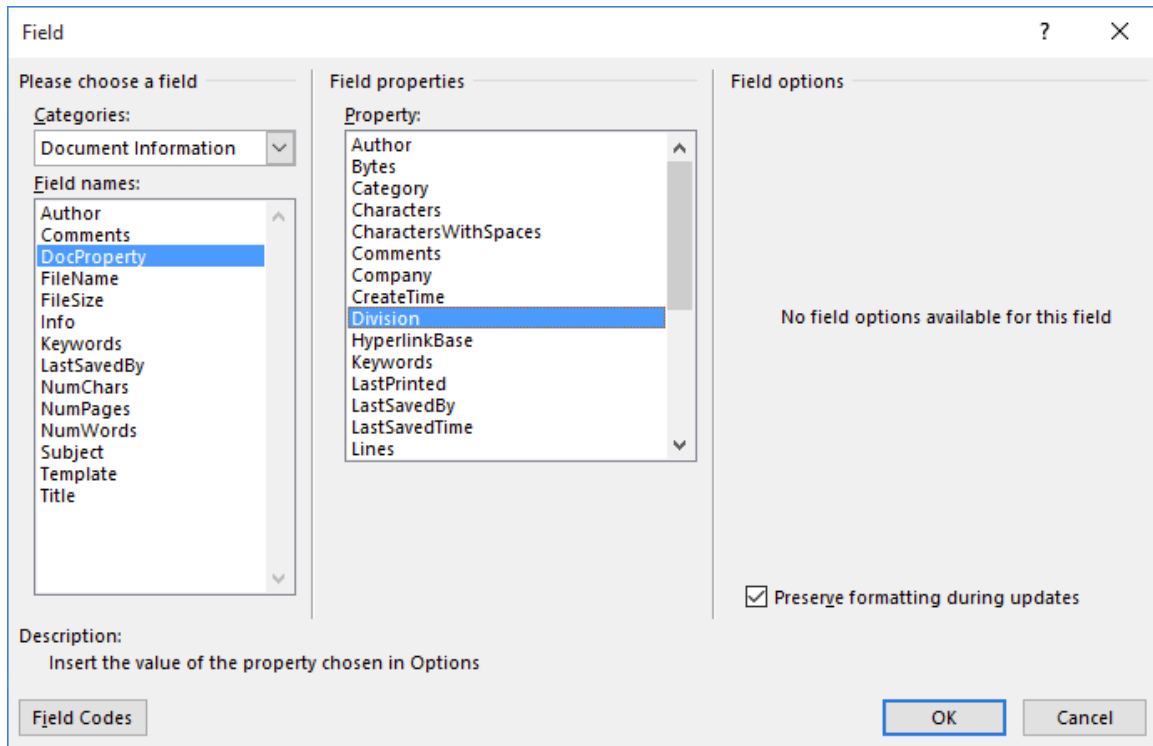


Figure 6-5
Inserting a custom field into a document

PAUSE. LEAVE Word open for the next exercise.

Working with Forms

In Word, a form is a document that has one or more data collection fields—called content controls—inserted, which can contain data. You can create forms that collect structured data for documents, such as employment applications, invoices, and employee time sheets.

Take Note

As you think about creating a form, visualize how the form fields will align with one another. You might want to create a table to hold the fields and their labels to ensure that the fields line up neatly.

In the following exercise, you will insert content controls into a document to create a form that employees can complete to document their hours worked.

Step by step Insert Content Controls

GET READY. OPEN the **Time Sheet** document from the lesson folder.

1. To insert content controls, you must first display the Developer tab on the ribbon. To do this, click **File** and then click **Options**. The *Word Options* dialog box appears.
2. Click **Customize Ribbon** (see Figure 6-6).
3. In the list on the right, select the **Developer** checkbox.
4. Click **OK**. The Developer tab appears.
5. On the Developer tab, in the Controls group, click the **Design Mode** button. Design Mode is a toggle; clicking it activates the mode.

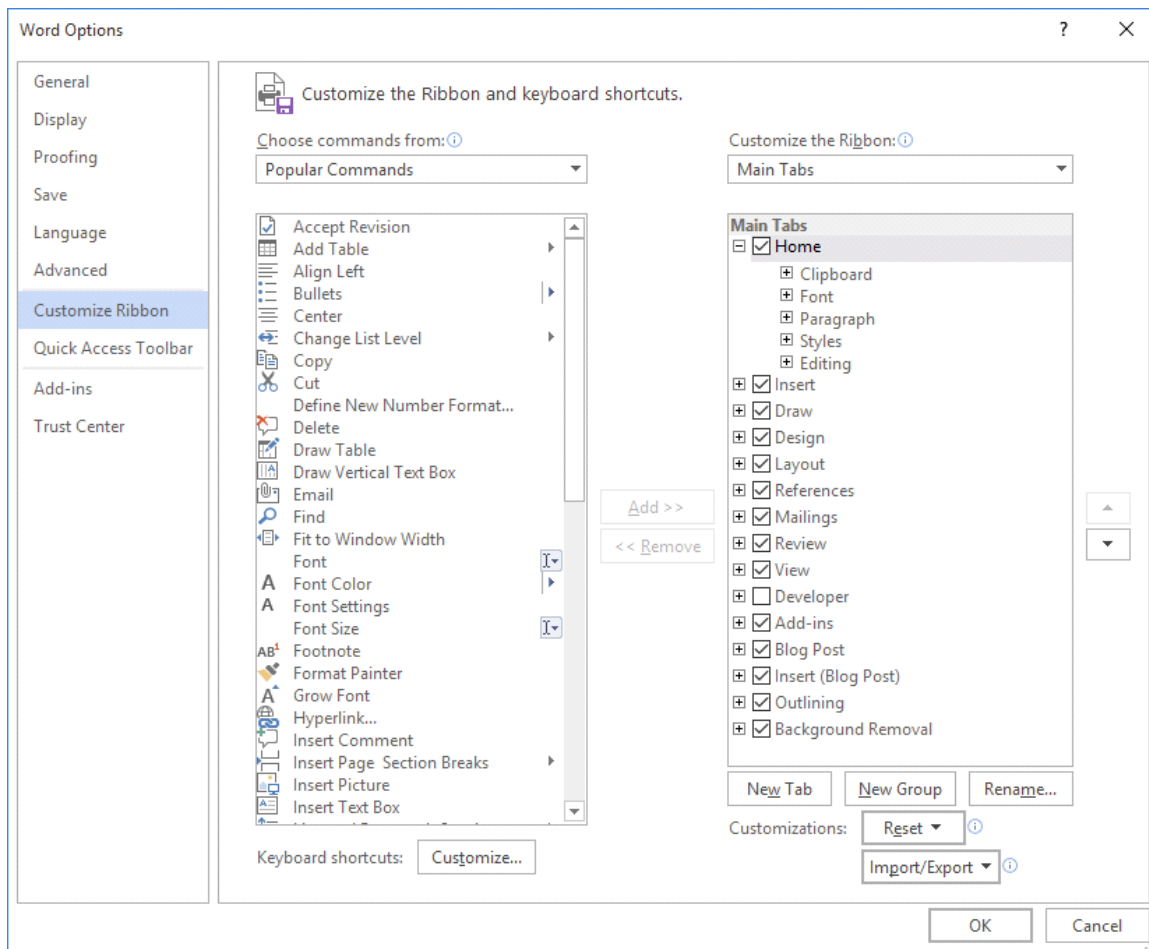


Figure 6-6
Customize Ribbon tab in the Word Options dialog box

6. In the document, place the insertion point in the empty cell next to the Employee Number cell.
7. On the Developer tab, in the Controls group, click the [Plain Text Content Control](#) button. (It is the second button on the top row.) A text-based content control appears in the cell. See Figure 6-7.

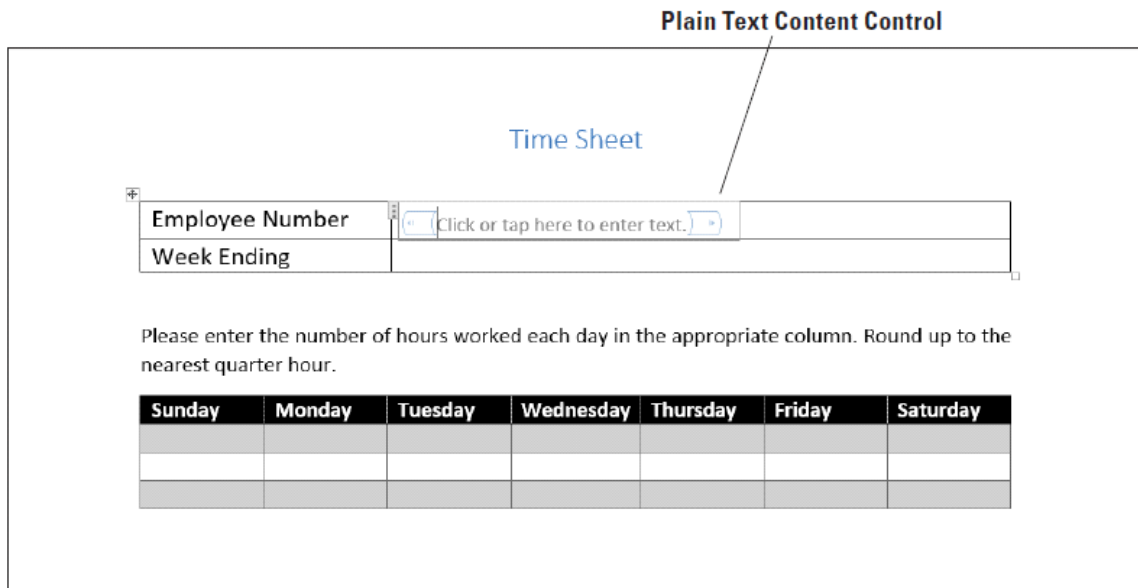


Figure 6-7
Inserting a plain text content control

8. Place the insertion point in the table cell to the right of the cell containing *Employee Name*.
9. On the Developer tab, in the Controls group, click the [Drop-Down List Content Control](#) button. A drop-down list content control appears in the cell.
10. Place the insertion point in the table cell to the right of the cell containing *Week Ending*.
11. On the Developer tab, in the Controls group, click the [Date Picker Content Control](#) button. A date picker content control appears in the cell.
12. **SAVE** the document as **Time Sheet Fields** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

You can modify a content control's properties by right-clicking the content control and choosing Properties. A dialog box appears that is appropriate for the type of content control. You can manually edit the text in a content control's prompt by simply changing the text in the content control (while in Design Mode).

In the following exercise, you will modify the properties of a content control.

Step by step **Modify Content Control Properties**

GET READY. USE the **Time Sheet Fields** document that is open from the previous exercise.

1. Click in the content control for Employee Number and then edit the text in the control to read *Click here to enter your employee number*.
2. Right-click the content control for Employee Name and, on the context menu, select [Properties](#). The *Content Control Properties* dialog box appears.
3. In the Drop-Down List Properties section, click [Add](#). An *Add Choice* dialog box

appears.

4. In the Display Name text box, type **Dobandi, Barbara**. The name is repeated in the Value text box.
5. Click **OK**. The name is added to the Drop-Down List Properties box.
6. Repeat Steps 3 to 5 to add the following names:
Engstrom, Esther
Fischer, Peter
Maman, David
Toth, Andras (see Figure 6-8).
7. Click **OK**.

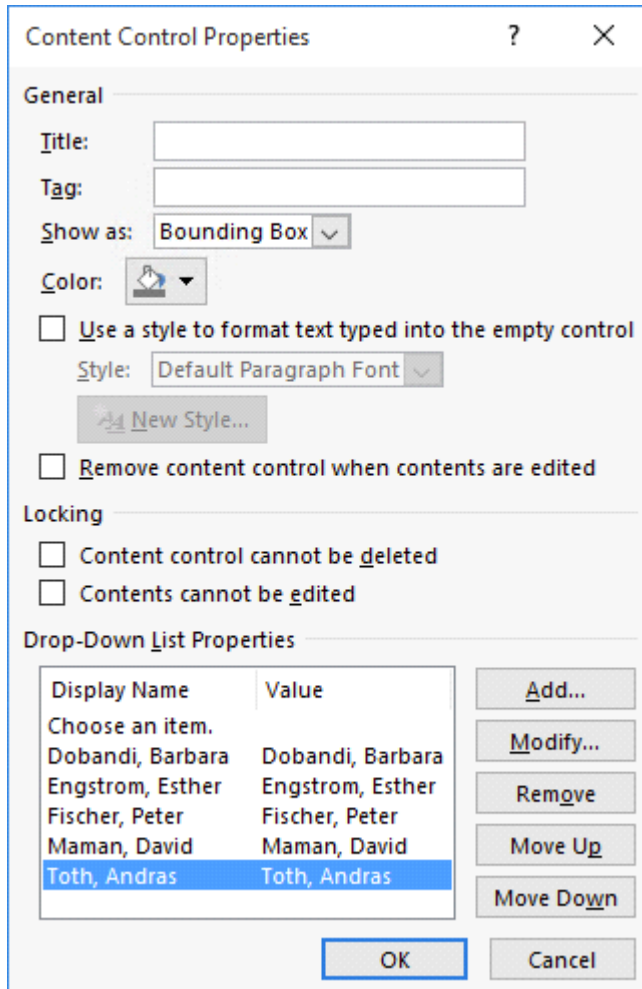


Figure 6-8
Modify drop-down list control properties

8. Right-click the content control for Week Ending and, on the context menu, select **Properties**. The *Content Control Properties* dialog box appears.
9. In the Date Picker Properties section, select the number format that contains the day of the week. See Figure 6-9.

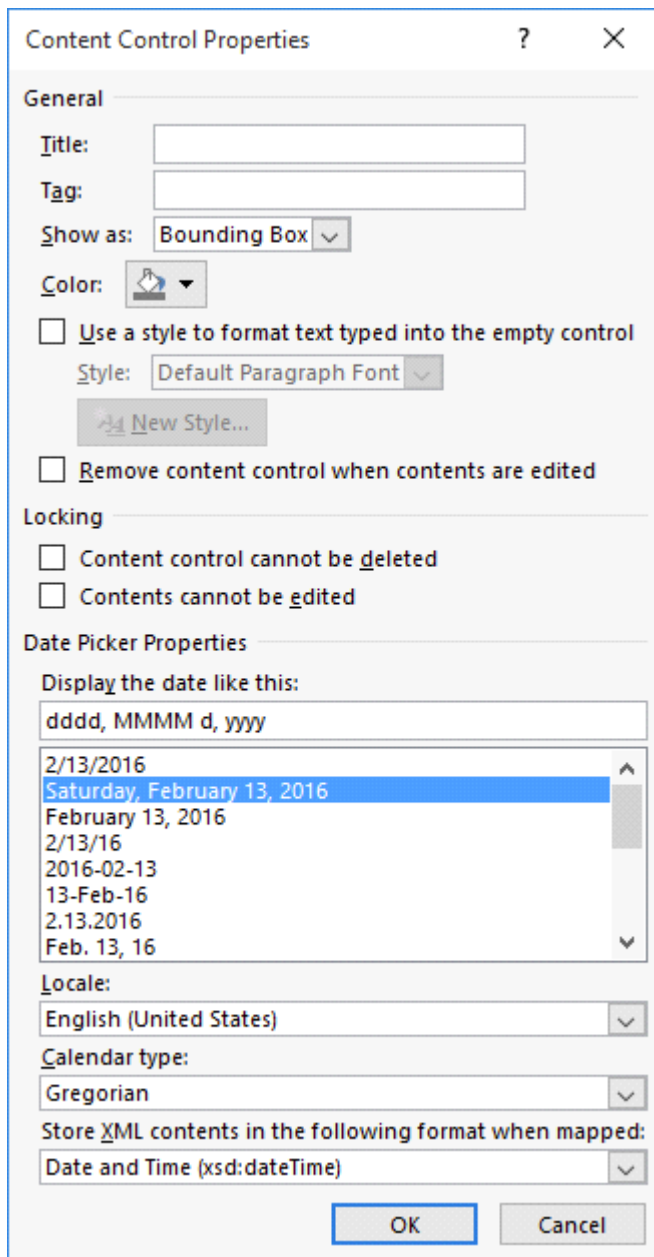


Figure 6-9
Modify date picker control properties

10. Click **OK** to close the dialog box.
11. Click the **Design Mode** button to toggle Design Mode off. The content controls appear as they will when users see the form.
12. Click in the content control for the employee number and then type **1003**.
13. Click in the content control for Employee Name and then select Fischer, Peter.
14. Click in the content control for week ending and then select last Saturday as the date.
15. In the table for the hours, type **8** in the first blank row for Monday, Wednesday, and Friday.
16. **SAVE** the document as **Time Sheet Fields 2** in the lesson folder on your flash drive and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

Creating Indexes

An index is an alphabetical list of the key topics in a document, along with the page numbers on which those topics appear. Most non-fiction books include an index at the end.

Creating an index in a Word document is a two-step process. In the first step, you mark each instance of words that should appear in the index. This can be a very time-consuming step; for a large document, it can take hours or even days.

In the second step of the process, you issue the command for Word to generate the index. It is during this step that the actual index is created. There are numerous options for creating indexes with different structures and layouts.

Take Note

Indexing takes some thought because not every instance of every word may be appropriate for indexing; only usages that are significant should be included. Creating good indexes is a skill that people develop with practice. Some people make a career of marking up documents (mostly book manuscripts) for indexing.

Marking Index Entries Manually

One way to mark index entries is to work through the whole document manually, marking every instance of each word to be indexed. Each index entry is marked with a {XE} field code, with the phrasing and formatting for the index entry as arguments in that code. For example:

```
{XE "Warranties"}
```

Manually marking the terms to be indexed results in the highest quality index. This is because you can exclude certain instances of the words if they are not significant. An index with too many irrelevant entries is as useless as one with too few entries. For example, imagine how useless it would be to index all instances of the phrase "Microsoft Word" in this book you are reading now. It appears on nearly every page. The manual method also enables you to use different words to index certain phrases or concepts that are synonyms, and to index certain words under two or more different main entries.

Most index entries are main entries—that is, they appear at the top level of alphabetization. You can also create subentries, which appear in a separate subordinate alphabetized list beneath one of the main entries. For example, if there are multiple skills covered pertaining to a certain topic, it might appear in the index like this:

```
Furniture  
    Building, 5
```

Refinishing, 18

Selling, 21

In the following exercise, you will mark some index entries manually in a document.

Step by step Mark Index Entries Manually

GET READY. OPEN the **Research on First Ladies** document from the lesson folder.

1. In the second paragraph, under the Women in Politics heading, select the phrase *creation of the First Lady title*.
2. On the References tab, in the Index group, click **Mark Entry**. The *Mark Index Entry* dialog box appears.
3. In the Main entry text box, type **First Lady**.
4. In the Subentry text box, type **creation of title** (see Figure 6-10).
5. Click **Mark**. The formatting symbols are made visible and an {XE} field code appears in the document.
6. Leave the *Mark Index Entry* dialog box open and then drag it to the side so you can see the text behind it.
7. In the History of First Ladies section, select *Warren G. Harding*.

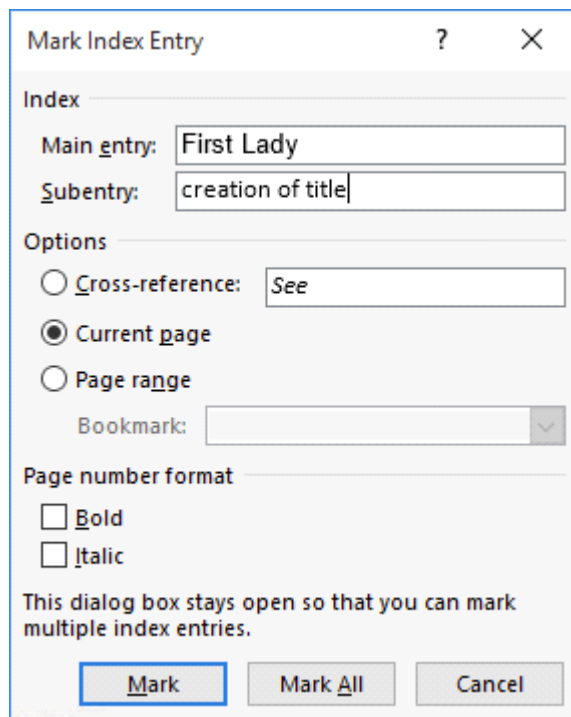


Figure 6-10
Marking an index entry

8. In the *Mark Index Entry* dialog box, place the insertion point in the Main entry text box. The Warren G. Harding text appears.
9. Click **Mark**.
10. In the Main Entry text box, type **First Lady**. In the Subentry text box, type **wife of Warren G. Harding**.

11. Click **Mark** again.
12. In the Role of First Ladies section, select the phrase *social hostesses, spokeswomen or political surrogates and independent advocates*.
13. In the *Mark Index Entry* dialog box, in the Main Entry text box, type **First Lady**. In the Subentry text box, type **categories** and then click **Mark**.
14. In the Power of First Ladies section, select the name *Abigail Adams* and mark it with the Main Entry value of **Adams, Abigail**.
15. In the same way, mark the names of the other first ladies in the sentence, creating main entries from their names, with the last name first (see Figure 6-11).

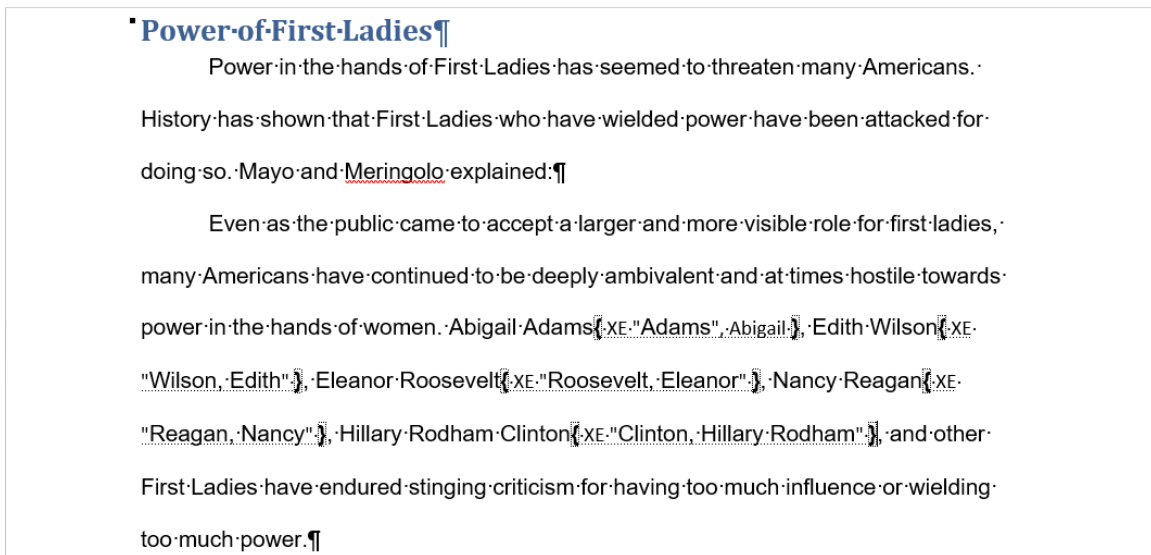


Figure 6-11
Index field codes

16. **CLOSE** the *Mark Index Entry* dialog box.
17. **SAVE** the document as **Research on First Ladies Indexed** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Marking Index Entries with an AutoMark File

Another way to mark index entries is to create an AutoMark file. This is a document that lists one instance of all the words that should be included in the index. Word can use this file to automatically mark all instances of each of the included words in the entire document. This method is much faster and easier than manually marking a document, but may result in too much marking.

An AutoMark file contains a two-column table. In the left column, type the words or phrases that should appear in the index—in other words, the words and phrases to find and mark in the document. In the right column, type the words the way they should appear in the index.

If you want to create subentries, separate the main entry and subentry with a colon in

the right column, like this: Furniture:Refinishing.

Indexing is case-sensitive, so make sure you include all variations of a word in the right column. It's okay to have duplicate entries in the left column.

In the following exercise, you will edit an AutoMark file and then use it to mark up a document for indexing.

Step by step Mark Index Entries Automatically with an AutoMark File

GET READY. USE the document that is open from the previous exercise.

1. **OPEN** the **AutoMark** document from the lesson folder.
2. In the blank rows at the bottom of the table, type the following (see Figure 6-12):
Meringolo Historians:Meringolo, Denise
Mayo Historians:Mayo, Edith
Anthony Historians:Anthony, Carl Sferazza
Gutin Historians:Gutin, Myra



Abigail Adams	First Lady:Adams, Abigail
Edith Wilson	First Lady:Wilson, Edith
Eleanor Roosevelt	First Lady:Roosevelt, Eleanor
Nancy Reagan	First Lady:Reagan, Nancy
Hillary Rodham Clinton	First Lady:Clinton, Hillary Rodham
Meringolo	Historians:Meringolo, Denise
Mayo	Historians:Mayo, Edith
Anthony	Historians:Anthony, Carl Sferazza
Gutin	Historians:Gutin, Myra

Figure 6-12
AutoMark entries

3. **SAVE** the document as **AutoMark Entries** and **CLOSE** the file.
4. In the **Research on First Ladies Indexed** document, on the References tab, in the Index group, click **Insert Index**. The *Index* dialog box appears.
5. Click the **AutoMark** button. The *Open Index AutoMark File* dialog box appears.
6. Select the **AutoMark Entries** file that you saved earlier and then click **Open**. Word automatically marks all of the entries that were listed in the file.

Take Note

Notice that Word inserts an index field code for all of the occurrences of the terms in the AutoMark table.

7. **SAVE** the document as **Research on First Ladies Indexed 2** in the lesson folder on

your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Creating and Updating an Index

After you have completed the markup in a document, you can generate the index. You can place an index anywhere in a document, but they are traditionally placed at the end.

In the following exercise, you will generate the index, make a change to the index markup, and then update the index.

Step by step Create and Update an Index

GET READY. USE the document that is open from the previous exercise.

1. Position the insertion point at the end of the document and then press **Ctrl+Enter** to create a page break.
2. On the References tab, in the Index group, click **Insert Index**. The *Index* dialog box appears. See Figure 6-13.

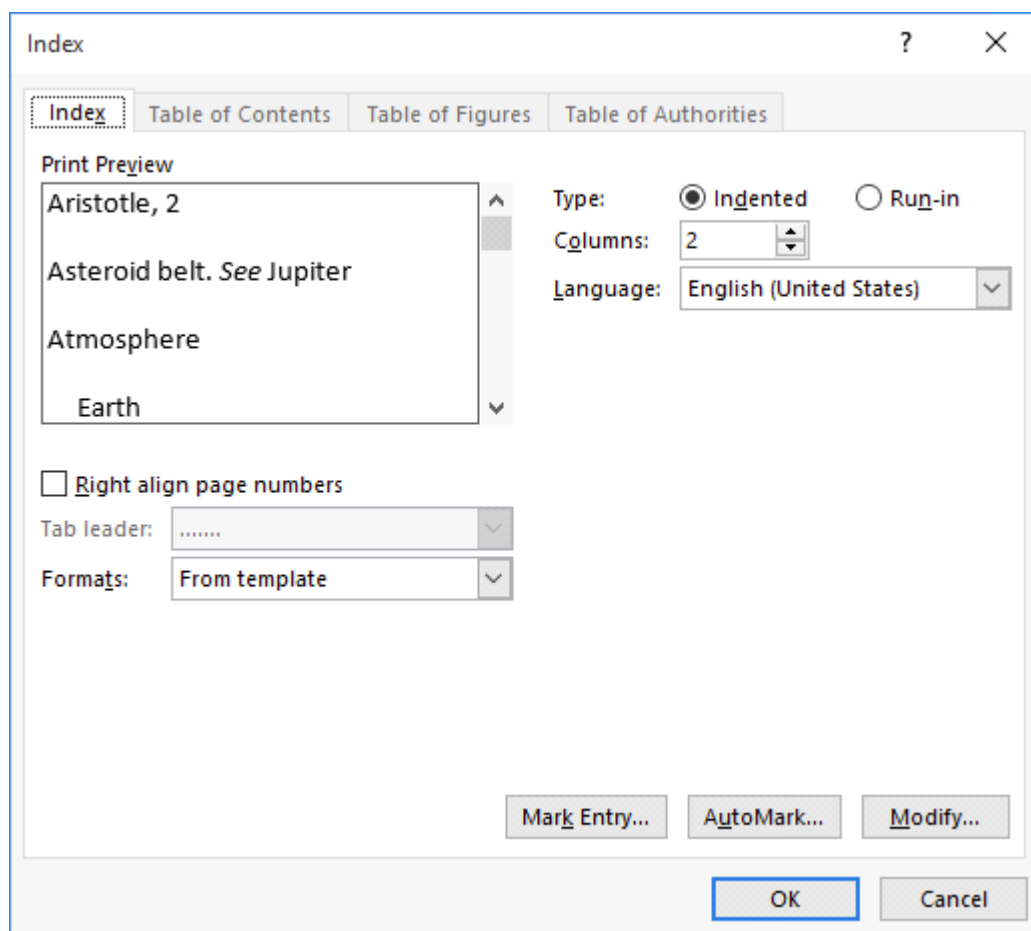


Figure 6-13
Index dialog box

3. In the **Formats** drop-down list, choose **Classic**.

4. Click **OK**. Word creates the index. Because the index is short, the separate headings for each letter of the alphabet might seem like overkill.
5. Notice that the index entry for Warren G. Harding is alphabetized by his first name. In the History of First Ladies section of the document, locate the {XE "Warren G. Harding"} field code and then change it to read {XE "Harding, Warren G."}.
6. Right-click anywhere on the index and choose **Update Field**. The index is updated to include Harding, Warren G. under the letter H (see Figure 6-14).

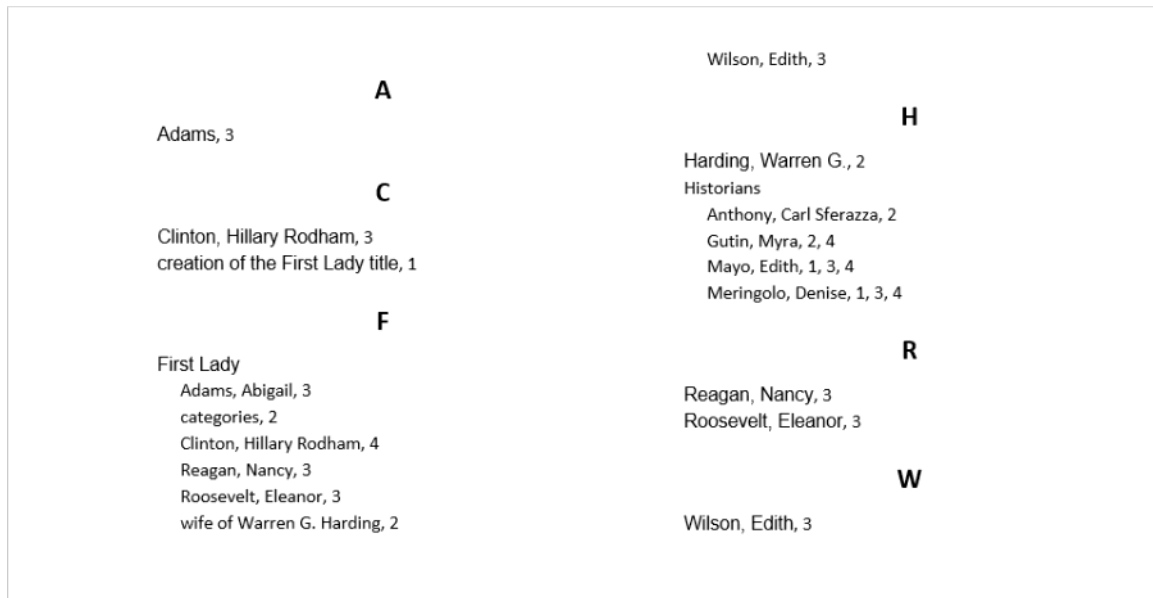


Figure 6-14
Classic index

7. Right-click the index again and then choose **Edit Field**. The *Field* dialog box appears.
8. Click the **Index** button. The *Index* dialog box reappears.
9. In the Formats drop-down list, select **Simple**.
10. Click **OK**. A confirmation appears asking if you want to replace the index.
11. Click **OK**. Word recreates the index using the new format, which does not include the alphabet headings (see Figure 6-15).

Adams, 3

Clinton, Hillary Rodham, 3
creation of the First Lady title, 1

First Lady
Adams, Abigail, 3
categories, 2
Clinton, Hillary Rodham, 4
Reagan, Nancy, 3
Roosevelt, Eleanor, 3
wife of Warren G. Harding, 2

Wilson, Edith, 3

Harding, Warren G., 2

Historians
Anthony, Carl Sferazza, 2
Gutin, Myra, 2, 4
Mayo, Edith, 1, 3, 4
Meringolo, Denise, 1, 3, 4

Reagan, Nancy, 3
Roosevelt, Eleanor, 3

Wilson, Edith, 3

Figure 6-15
Simple index

- 12.** **SAVE** the document as **Research on First Ladies Indexed 3** in the lesson folder on your flash drive and then **CLOSE** the file.

STOP. CLOSE Word.

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. Which of the following actions modifies a field's properties?
 - a. Double-clicking the field
 - b. Right-clicking the field and choosing Edit Field
 - c. Right-clicking the field and choosing Show Field Code
 - d. Clicking the Modify button on the Insert tab
2. Which of the following instructions best describes how to insert a custom field in a document?
 - a. From the *Field* dialog box, choose Document Information and then choose DocProperty. Then choose the custom field name from the Property list.
 - b. Click the Text Box button on the Insert tab.
 - c. From the Insert tab, select the custom field from the Fields gallery.
 - d. From the *Properties* dialog box, on the Custom tab, select the field and choose Insert.
3. A form field in Word 2016 is also known as which of the following?
 - a. A merge field
 - b. A macro
 - c. A content control
 - d. A module
4. From which of the following tabs can you select Mark Entry to mark an index entry?
 - a. References
 - b. Insert
 - c. Home
 - d. Mailings
5. In an AutoMark table, in which column should the text appear as it will appear in the index itself?
 - a. right column
 - b. left column
 - c. both columns
 - d. neither column

True/False

Circle T if the statement is true or F if the statement is false.

- T F** 1. Word uses fields for features such as page numbering and hyperlinks.
- T F** 2. To insert a field in a document, on the Insert tab, click the Code button.
- T F** 3. Custom fields are created in the *Properties* dialog box for the document.
- T F** 4. To edit a form, you must be in Design Mode.
- T F** 5. An AutoMark file should list all the words to be indexed in a single-column

Projects

Project 6-1: Creating a Sign-Up Form

In this project, you will create a form that can be used to sign up for a mailing list.

GET READY. LAUNCH Word if it is not already running.

1. **OPEN** the **Signup** document from the lesson folder.
2. **SAVE** the document as **Signup Form** in the lesson folder on your flash drive.
3. Position the insertion point in the blank cell to the right of *Today's Date* and then on the Insert tab, in the Text group, click **Explore Quick Parts** and then click **Field**. The *Field* dialog box appears.
4. Choose **Date** from the Field names list and choose the date with this format: 8-Jul-16 from the Date formats list. Click **OK**.
5. Click in the blank cell to the right of Name.
6. On the Developer tab, in the Controls group, make sure that **Design Mode** is selected and then click **Plain Text Content Control**.
7. Edit the prompt text in the field to read *Enter your name here*.
8. Click in the blank cell to the right of Email Address.
9. Click **Plain Text Content Control**.
10. Edit the prompt text in the field to read *Enter your email here*.
11. Click the **Design Mode** button to exit that mode.
12. **SAVE** the document and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next project.

Project 6-2: Indexing a Document

In this project, a section of the Books and Beyond Employee Handbook has been updated, and needs to be marked up for indexing.

GET READY. LAUNCH Word if it is not already running.

1. **OPEN** the **Annual Report** document from the lesson folder.
2. **SAVE** the document as **Annual Report Indexed** in the lesson folder on your flash drive.
3. Select the first Heading 1 heading (*To Our Stockholders*).
4. On the References tab, in the Index group, click **Mark Entry**.
5. Click the **Mark** button.
6. Scroll down and select the next Heading 1 heading (Financial Summary).
7. In the *Mark Index Entry* dialog box, click in the Main entry text box and then click **Mark**.
8. Scroll down and select the next Heading 1 heading (Financial Statements).
9. In the *Mark Index Entry* dialog box, click in the Main entry text box and then click **Mark**.
10. Scroll down and select the next Heading 1 heading (Notes to Financial Statements).

- 11.** In the *Mark Index Entry* dialog box, click in the Main entry text box and then click [Mark](#).
- 12.** Scroll down and select the next Heading 1 heading (Independent Auditor's Report).
- 13.** In the *Mark Index Entry* dialog box, click in the Main entry text box and then click [Mark](#).
- 14.** Scroll down and select the next Heading 1 heading (Contact Information).
- 15.** In the *Mark Index Entry* dialog box, click in the Main entry text box and then click [Mark](#).
- 16.** Scroll down and select the next Heading 1 heading (Company Information).
- 17.** In the *Mark Index Entry* dialog box, click in the Main entry text box and then click [Mark](#).
- 18.** Close the Mark Index Entry dialog box.
- 19.** [SAVE](#) the document and then [CLOSE](#) the file.

CLOSE Word.