Supercharge Your Word Templates with Content Controls

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Toolkit 2.3

Wordman Speaks™

Benefits to you

- **No more inconsistencies!** Content Controls allow you to enter text in one document location and have it repeated in other locations

- **No more guessing!** Content Controls provide easy-to-use placeholders for required content

- **No wrong answers!** Content Controls allow users to pick from a prepopulated list of options
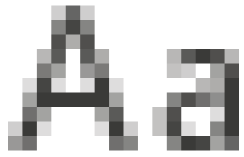
What is a Content Control?

- "Bounded and potentially labeled regions in a document that serve as containers for specific types of content" (Microsoft)

- Can contain content such as dates, plain text, paragraphs of formatted text, lists, or images

- Can be bound to Document Properties or an XML structure
  - A common storage space for multiple Content Controls to share content

- Can also be used to select template building blocks
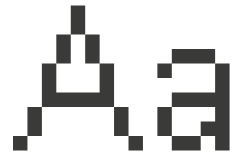 - That'll be the subject of a future presentation!
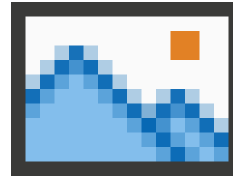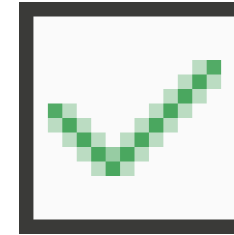
Content Control types
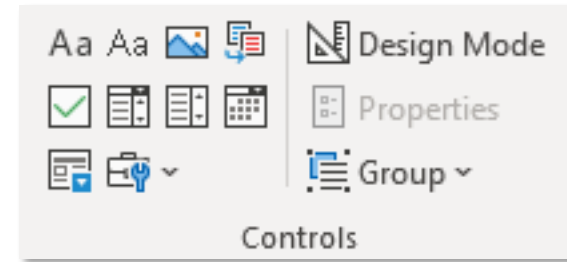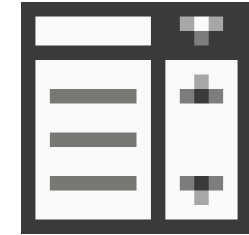
Rich Text

Plain Text

Picture

Check Box

Combo Box

Dropdown

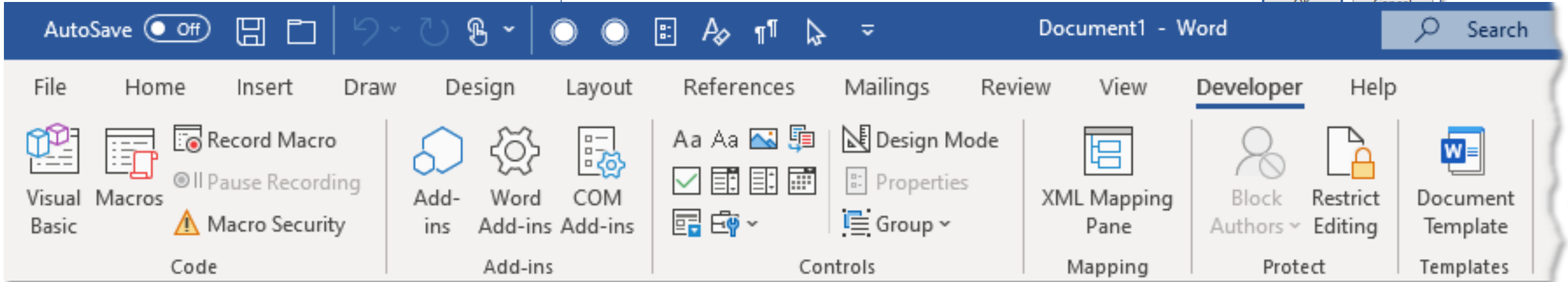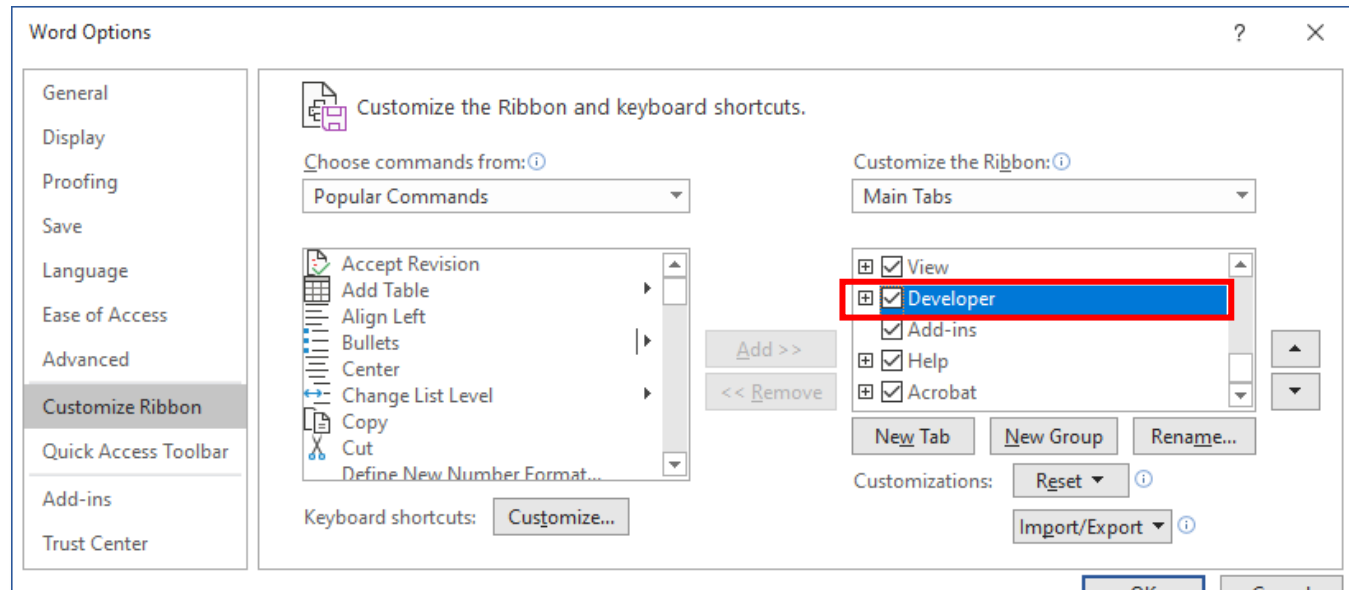Date Picker

Repeating
Section

Building
Block Gallery

Enabling Word's Developer tab

- Go to **File > Options > Customize Ribbon**

- Check **Developer**

Content Controls linked to Document Properties

Plain Text

Title Document Property for cover pages and headers

- *Scenario:* Add Plain Text Content Controls to the template cover page and to the template header(s), both bound to the document **Title** property

- On cover page, go to **Insert > Quick Parts > Document Property > Title**

- **Note:** Plain Text Content Controls use the style of underlying paragraph, so this is my **Title** style (36pt Arial bold)

Changing ghost text

- Gray "ghost text" provides tips for users, disappears when text is entered
- You can customize this text for each control:
  - Click 📐 **Design Mode** in the **Developer > Controls Group**

Add header Content Controls

- In each section Header, go to **Insert > Quick Parts > Document Property > Title**, and change the ghost text if necessary:

- **Note:** I recommend a table to lay out your headers and footers. Set the left margin of the left cell and the right margin of the right cell to 0"

And test…
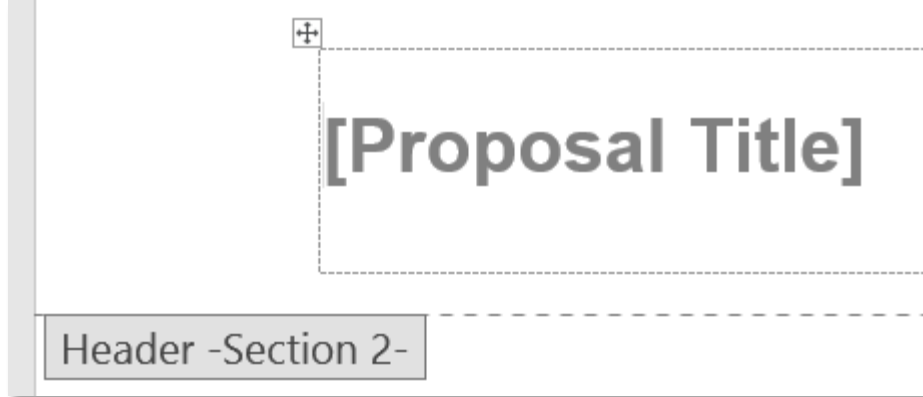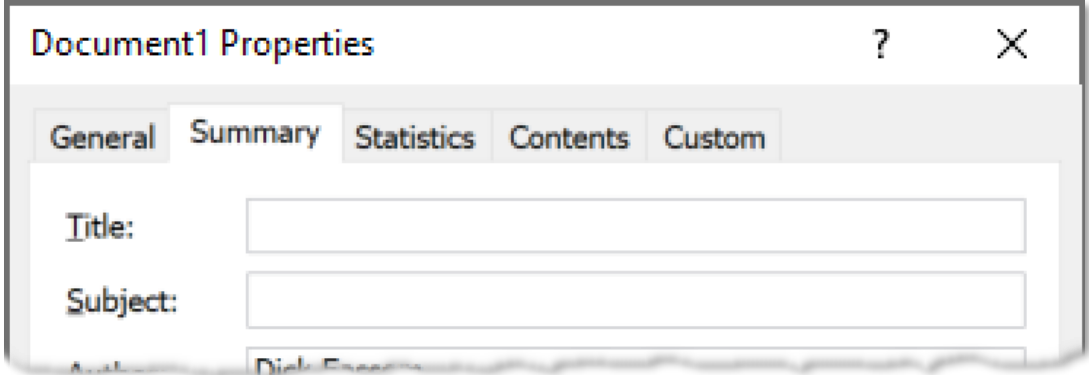
And test…
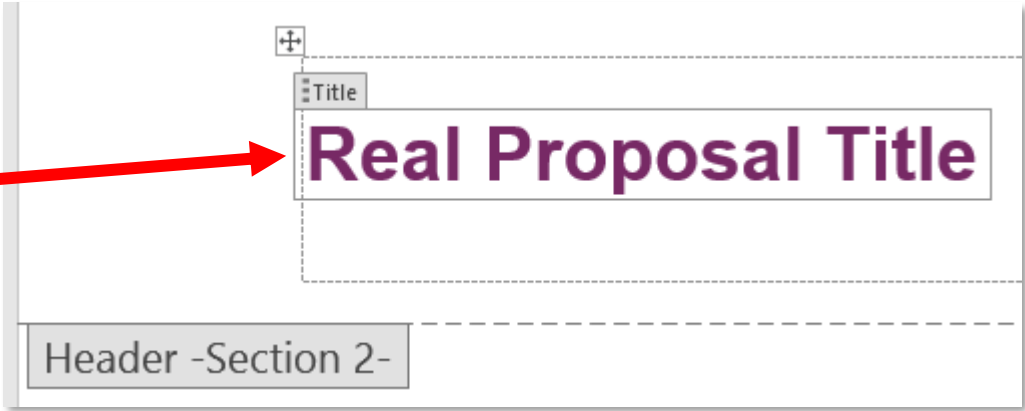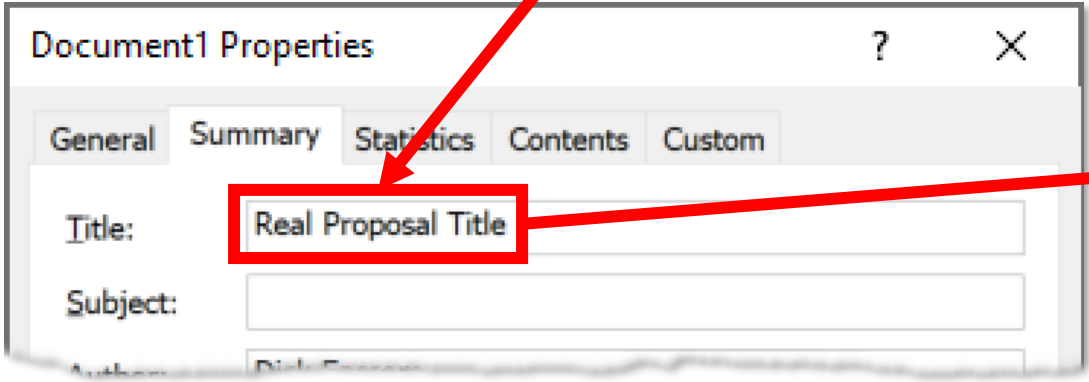
Submit Date property for cover page and footers

- *Scenario:* Add date Content Controls to the template cover page and template footer, both bound to the document **Publish Date** property

- On cover page, go to **Insert > Quick Parts > Document Property > Publish Date**

Date Picker

- We can change the Content Control name and ghost text to **Submit Date**

Changing Content Control name

- **Note:** Changing name of bound control does not affect binding
- Select Content Control and click ▦ **Properties** in **Developer > Controls** group:

Content Control Properties ? ✕

General

Title: Publish Date

Tag:

Show as: Bounding Box ⌄

Content Control Properties ? ✕

General

Title: Submit Date

Tag:

Show as: Bounding Box ⌄
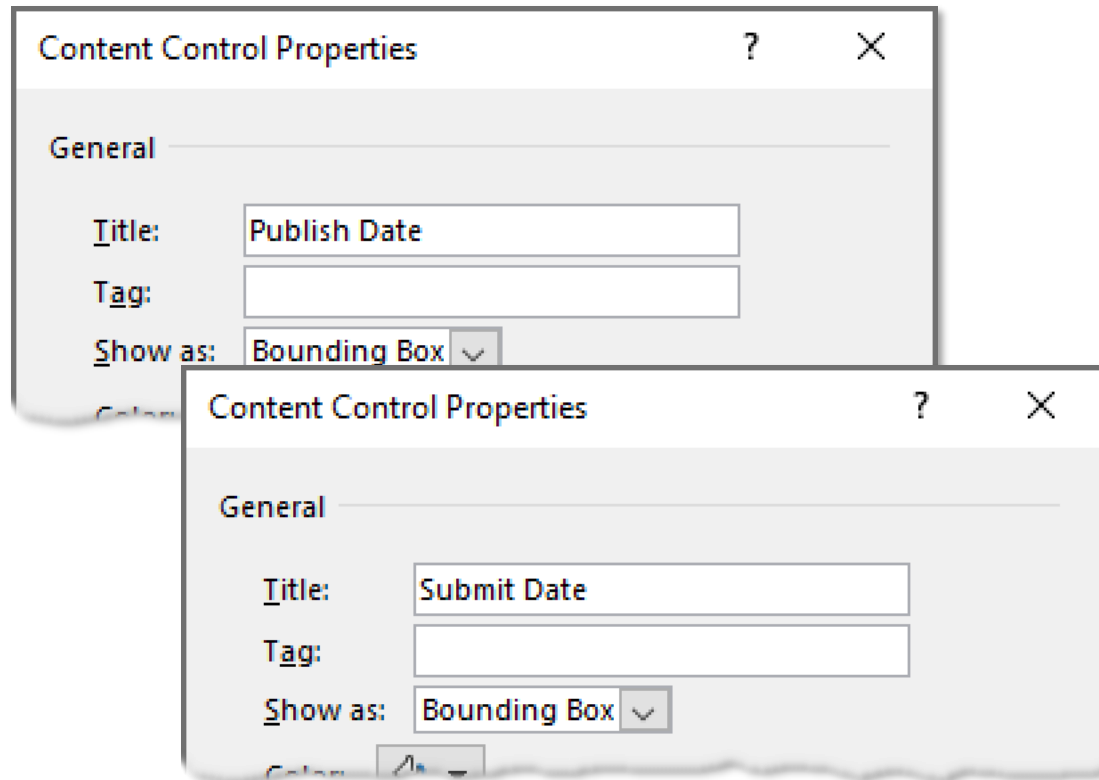
- You can also change date format:

Date Picker Properties

Display the date like this:

M/d/yyyy

5/30/2021
Sunday, May 30, 2021
May 30, 2021
5/30/21
2021-05-30
30-May-21
5.30.2021
May. 30, 21

Locale:
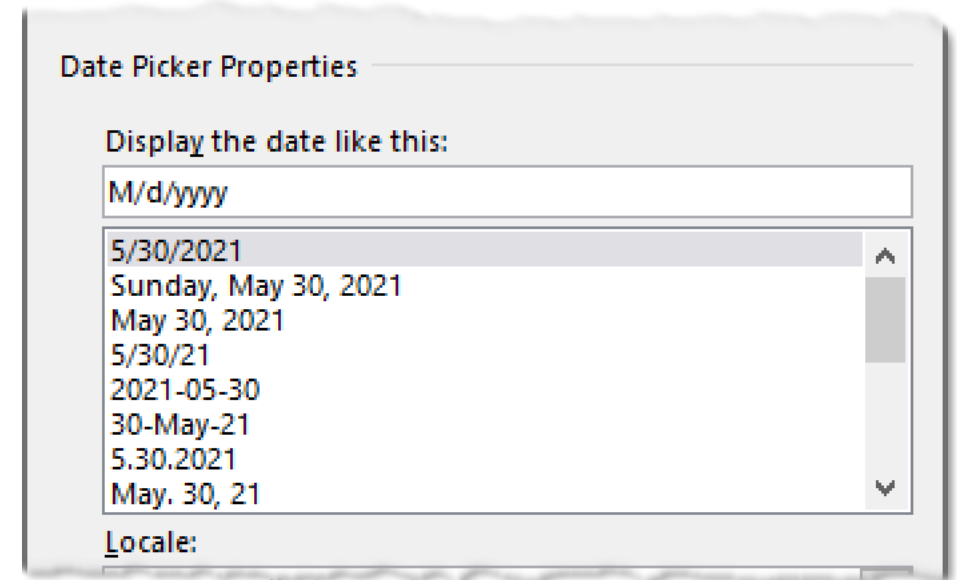
Change ghost text and add footer Content Control

- Change ghost text to **Submit Date**:
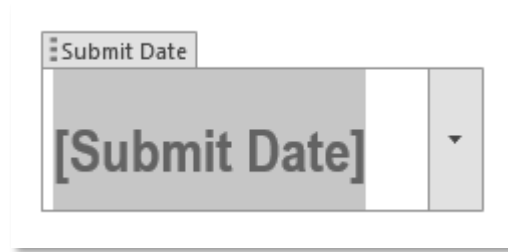
- In footer, go to **Insert > Quick Parts > Document Property > Publish Date**; change Content Control **Title** property and ghost text to **Submit Date**:
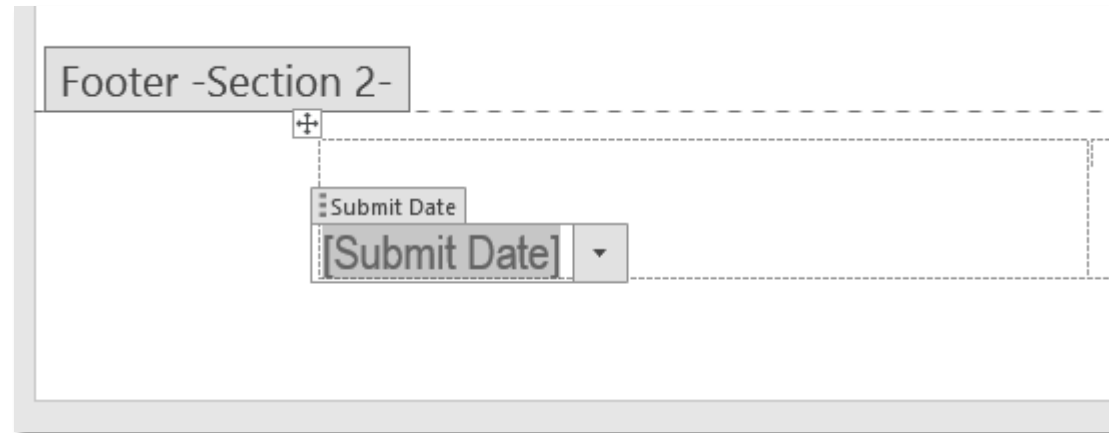
And test…
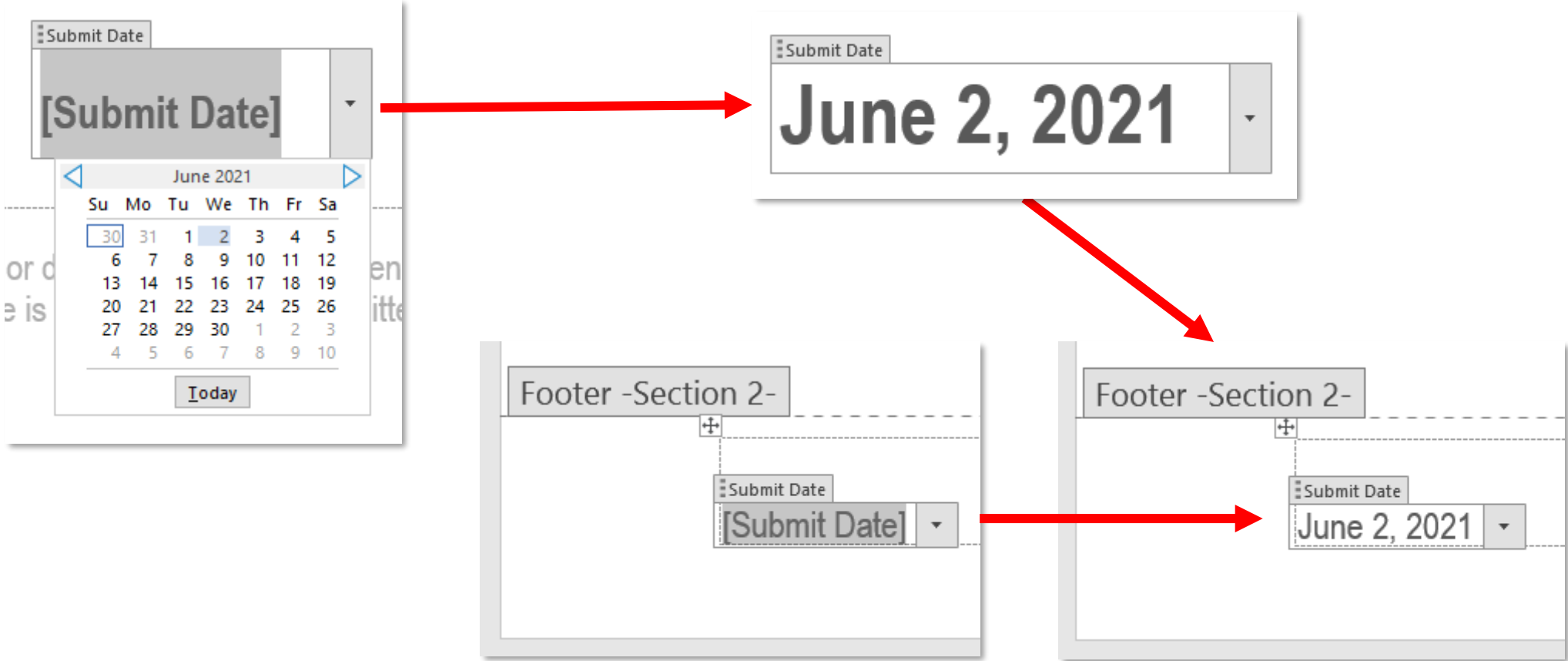
Where is Publish Date Document Property?

- Not visible on **Document Properties** dialog:

- Click **Developer > Mapping >** ⊞ **XML Mapping Pane**:
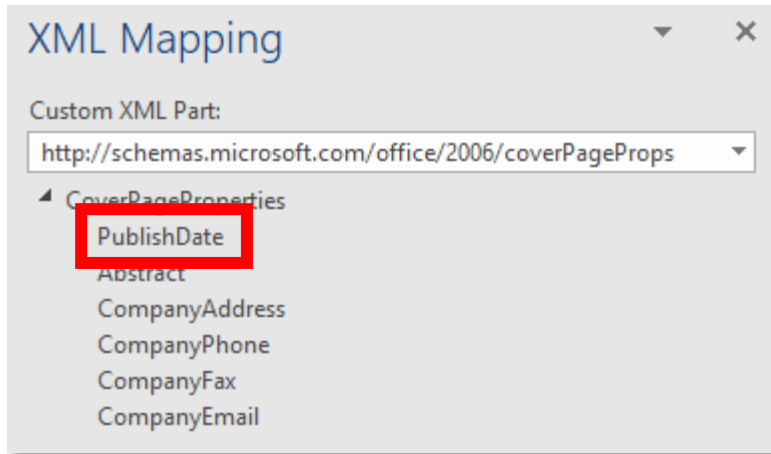
- **Custom XML Parts** contain more potential bindings (content storage) for Content Controls (more on this later...)
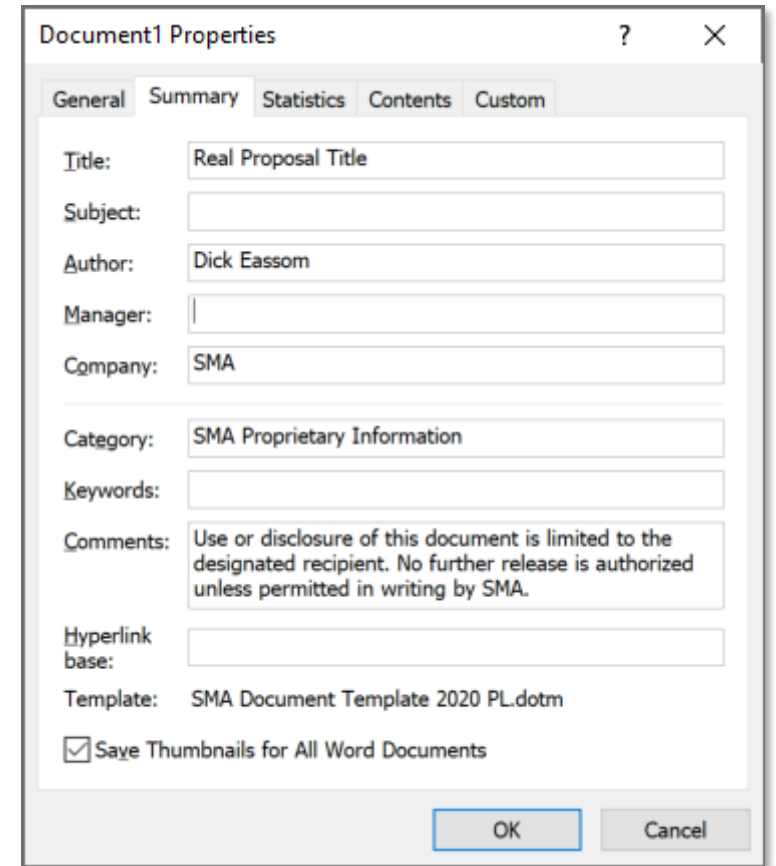
Content Controls for other data: cover letter

- Rich Text Content Controls can contain any formatted text

- All these are Rich Text Content Controls, except…

Combo Box

[Salutation] [First] [Last]
[Client title]
[Client email]

[Client Company Name]
[Client Address]
[Client City], [Client State] [Client ZIP]

- Combo Box Content Control allows user to choose from list or add another

Setting up the Salutation Combo Box

- Click ⬚ **Combo Box** on **Developer > Controls**:

- Select Content Control, then click ⬚ **Properties** in **Developer > Controls** group:
  - Select **Choose an item** in list and click **Remove**
  - Click **Add** and add **Mr.**, **Ms.**, etc.
  - Change **Title** to **Client Salutation**

- Click ⬚ **Design Mode**, change ghost text to **Salutation**

- But all these Content Controls are unbound, so no storage…

Let's get technical…

"Pull out, Betty! Pull out! … You've hit an artery!"

Gary Larson, 1982

Using cover page Content Controls more than once...

- Here's the final cover page:
- Typing **Salutation** and **Last** name in the address block will not copy to the **Dear...** line
- Content Controls are separate and not linked, i.e., unbound

- So how can we link them?
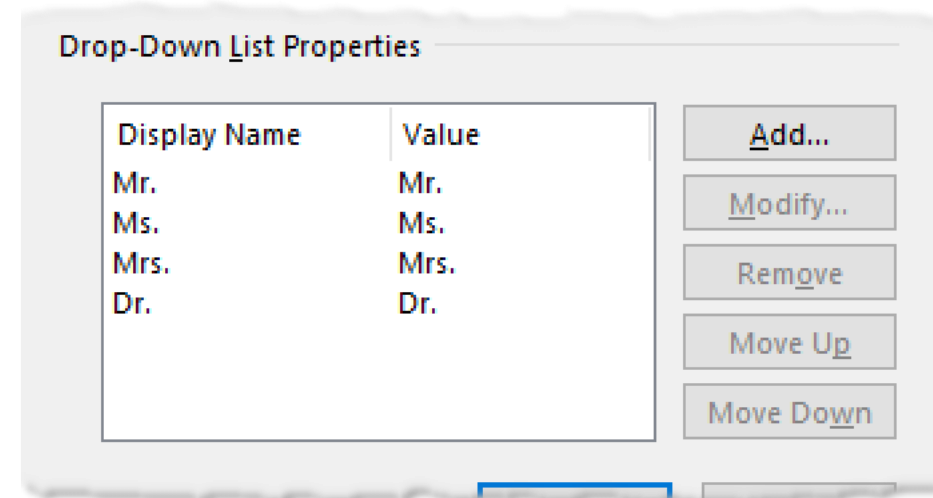
[Salutation] [First] [Last]
[Client title]
[Client email]

[Client Company Name]
[Client Address]
[Client City], [Client State] [Client ZIP]

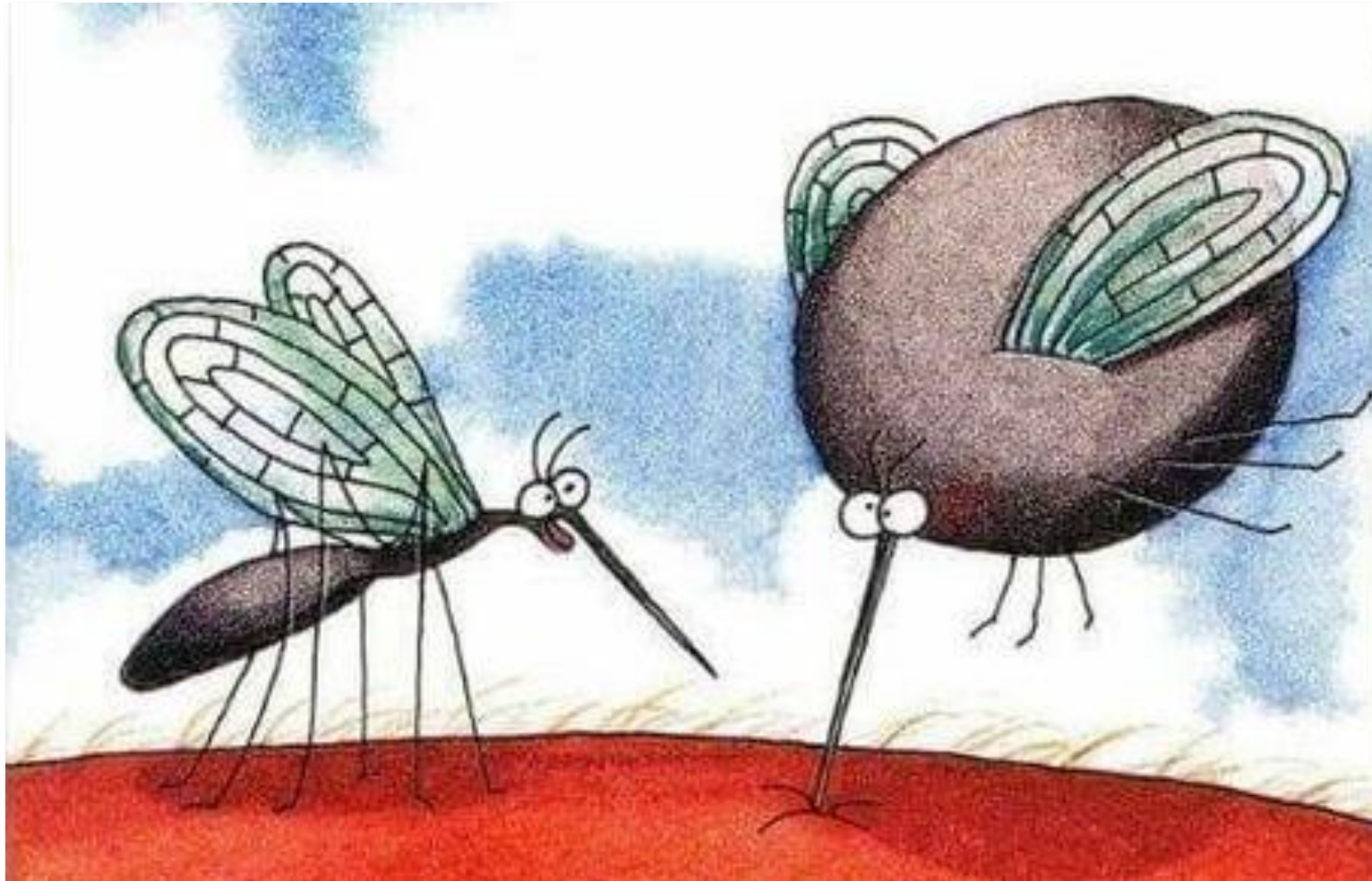Subject:		[Cover letter subject]

Dear [Salutation] [Last],

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Creating storage for Content Controls

- Create a simple XML* file using Notepad (or Notepad++)

- Storage is in the tags, e.g.,

<ClientZIP></ClientZIP>

Word inserts
content here

- Save as, say, **Client.xml**

```
C:\Users\DEassom\OneDrive\Presentations\2021 Supercharge\SMA.xml - Notepad++

File Edit Search View Encoding Language Settings Tools Macro Run Plugins Window ?

Client Library Code.txt | modCalls.bas | Library 210525.php | SMA.xml

 1  <?xml version="1.0" encoding="utf-8" standalone="yes"?>
 2  <ProposalProperties xmlns="SMA">
 3      <ClientSalutation></ClientSalutation>
 4      <ClientFirstName></ClientFirstName>
 5      <ClientLastName></ClientLastName>
 6      <ClientTitle></ClientTitle>
 7      <ClientEmail></ClientEmail>
 8      <ClientCompanyName></ClientCompanyName>
 9      <ClientAddress></ClientAddress>
10      <ClientCity></ClientCity>
11      <ClientState></ClientState>
12      <ClientZIP></ClientZIP>
13  </ProposalProperties>
14

eXtelength : 459    lines : 19        Ln : 16   Col : 1   Pos : 454        Windows (CR LF)   UTF-8        IN
```

* eXtensible Markup Language

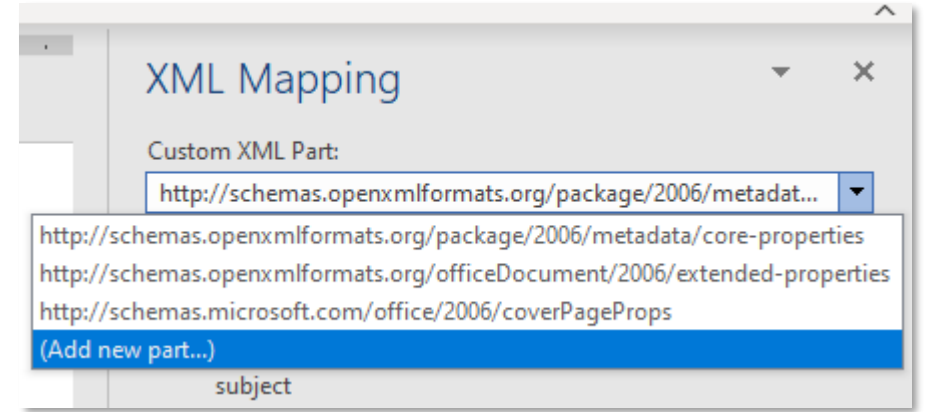*Wordman Speaks™*

Add to your template

- Click **Developer > Mapping >** ⊞ **XML Mapping Pane**

- Click **(Add new part...)** in the drop down

- Browse to your XML file and click **Open**

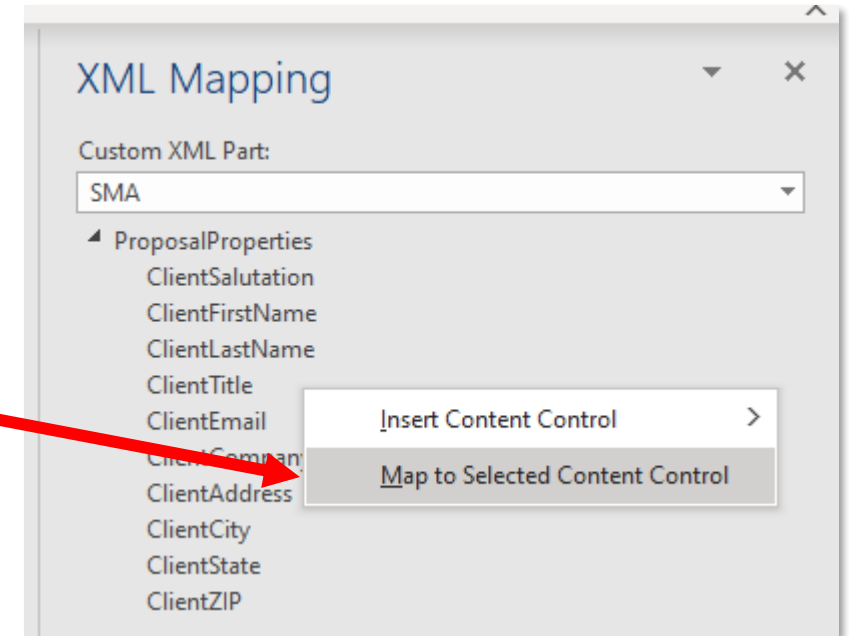- You now have custom content storage!
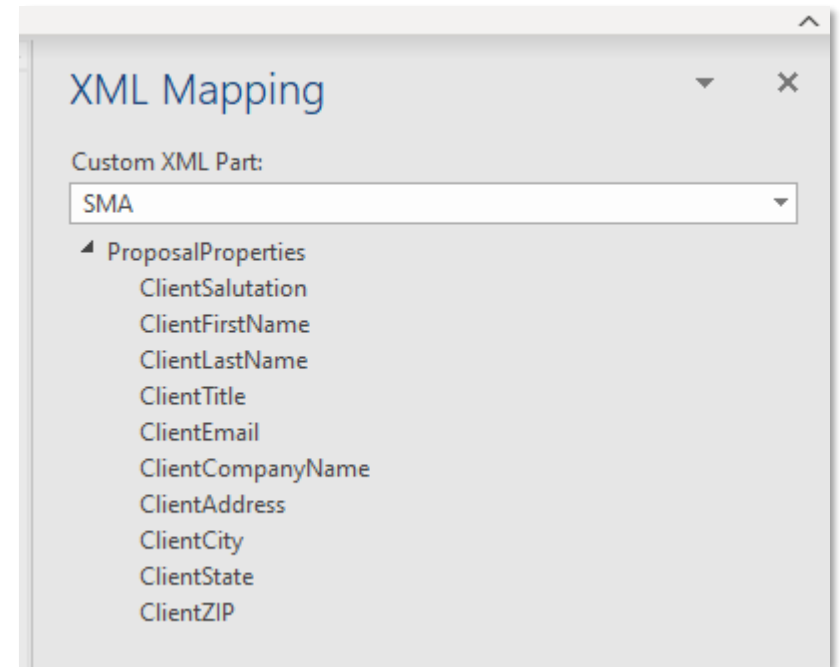
Using your content storage – Method 1

- Select Content Control
- In **XML Mapping Pane**, right click on required XML part property and select **Map to Selected Content Control**
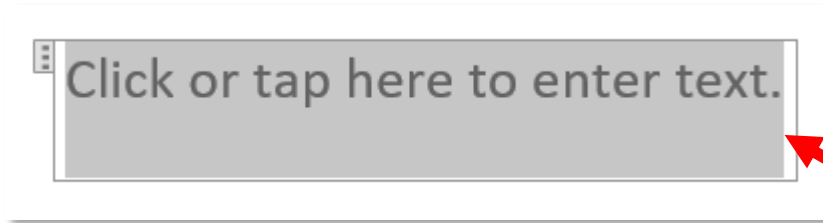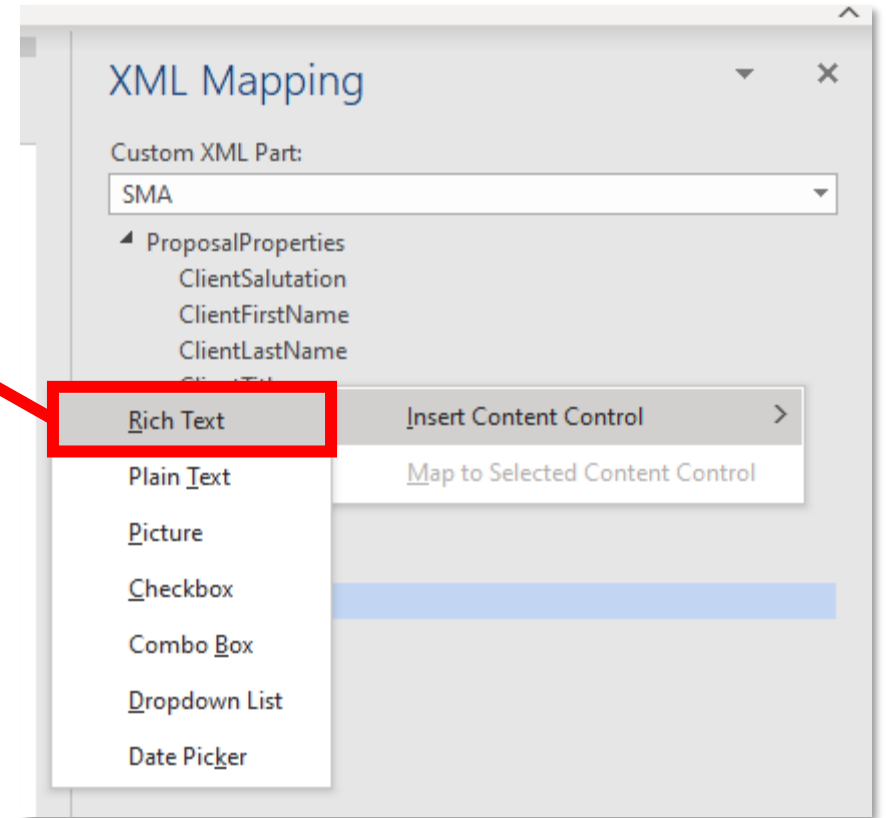
Using your content storage – Method 2

- In **XML Mapping Pane**, right click on required XML part property and select **Map to Selected Content Control**

Click or tap here to enter text.

- Change Content Control **Title** so you know the binding, and edit the ghost text:

Client Title

[Client Title]

XML Mapping

Custom XML Part:

SMA

▲ ProposalProperties
  ClientSalutation
  ClientFirstName
  ClientLastName

Rich Text	Insert Content Control ➤
Plain Text	Map to Selected Content Control
Picture	
Checkbox	
Combo Box	
Dropdown List	
Date Picker	

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What did we learn, Palmer?

- How to add Content Controls bound to Document Properties
- How to add a date picker Content Control
- How to add a Combo Box Content Control
- How to create custom content storage
- How to bind Content Controls with your custom content storage

- What else can we do with Content Controls?

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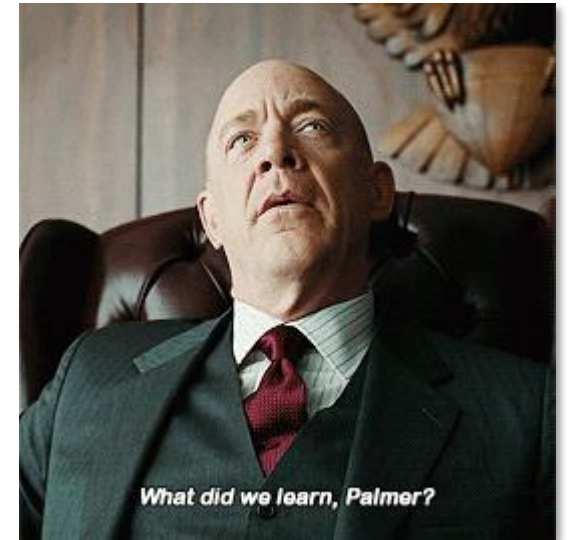
Advanced Content Controls

- Allow users to select from Building Blocks of preformatted content, e.g.,
  - Product descriptions
  - Signature blocks
  - Contract terms
  - Cover images
  - Etc.

- Create complex fill-in forms

- See me at BPC Denver in October for more!

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Questions?

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