



TECHSHOW2018

Document Assembly with Tools You Already Have

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TECHSHOW2018

AutoCorrect

- Corrects common typing and spelling errors
- Used for inserting commonly used text (i.e., Client name)
- Example:
 - Create an AutoCorrect entry when you type this:
abc
You get this:
ABC Company, Inc.



Demonstration of AutoCorrect



Building Blocks

- Adds blocks of text to your document
- Use for inserting large blocks of text
- Can include formatting and other text properties
- Example:
 - Create a Building Block called “My Notary Information”
 - Insert the Building Block to insert all of your notary information



Creating a Building Block

- Create and format your text
- Select Quick Parts from the Insert Tab
- Select Add to Quick Parts Gallery
- Name and Categorize Your Building Block



Document Item Tap

Store

My Add-ins

Wikipedia

Online Video

Link

Bookmark

Cross-reference

Comment

Header

Footer

Page Number

Text Box

Quick Parts

WordArt

Drop Cap

Object

Signature Line

Date & Time

Equation

Symbol

Legal

Attorney Closing

AutoText

Document Property

Field...

Building Blocks Organizer...

Save Selection to Quick Part Gallery...

Creating New Building Blocks

Creating your own Building Blocks in Word is very easy. Simply type the text or locate it in an existing document. Select the text you wish to turn into a Building Block, then select the Insert tab. Click Quick Parts and choose "Save Selection to Quick Parts Gallery" from the menu of choices.

Bookmarks

Bookmarks allow you to assign names to selected text or positions in the document to be referenced later in the document or to easily navigate to the placeholder in the document.

Instructions

Create New Building Block

Name: Creating Building Blocks

Gallery: Quick Parts

Category: General

Description:

Save in: Building Blocks.dotx

Options: Insert content only

OK Cancel



Using a Building Block

- Select Insert, Quick Parts and Blocks Organizer
- Locate the Building Block you want and select Insert
- The Building Block might also be available via a small preview window



Building Blocks Organizer

Building blocks:

Name	Gallery	Category	Template
Jeffrey S. Kr...	AutoText	General	Normal.dotm
Works Cited	Bibliograp...	Built-In	Built-In Buil...
Bibliography	Bibliograp...	Built-In	Built-In Buil...
References	Bibliograp...	Built-In	Built-In Buil...
ViewMaster	Cover Pages	Built-in	Built-In Buil...
Integral	Cover Pages	Built-in	Built-In Buil...
Austin	Cover Pages	Built-in	Built-In Buil...
Slice (Dark)	Cover Pages	Built-in	Built-In Buil...
Banded	Cover Pages	Built-in	Built-In Buil...
Grid	Cover Pages	Built-in	Built-In Buil...
Motion	Cover Pages	Built-in	Built-In Buil...
Facet	Cover Pages	Built-in	Built-In Buil...
Semaphore	Cover Pages	Built-in	Built-In Buil...
Ion (Light)	Cover Pages	Built-in	Built-In Buil...
Sideline	Cover Pages	Built-in	Built-In Buil...
Retrospect	Cover Pages	Built-in	Built-In Buil...
Whisp	Cover Pages	Built-in	Built-In Buil...
Slice (Light)	Cover Pages	Built-in	Built-In Buil...
Ion (Dark)	Cover Pages	Built-in	Built-In Buil...
Filigree	Cover Pages	Built-in	Built-In Buil...
Quadratic F...	Equations	Built-In	Built-In Buil...
Trig Identiti...	Equations	Built-In	Built-In Buil...

Click a building block to see its preview

Works Cited
 Chen, J. (2020). *Statistics and Inference*. New York: Corson Press.
 Hall, J. (2021). *Creating a Formal Publication*. Boston: Rosemary, Inc.
 Kawan, J. G. (2021). *How to Write Bibliographies*. Chicago: Adventure Works Press.

Works Cited
 Automatic bibliography (labeled "Works Cited") that includes all sources associated with the document

Edit Properties... Delete Insert

Close



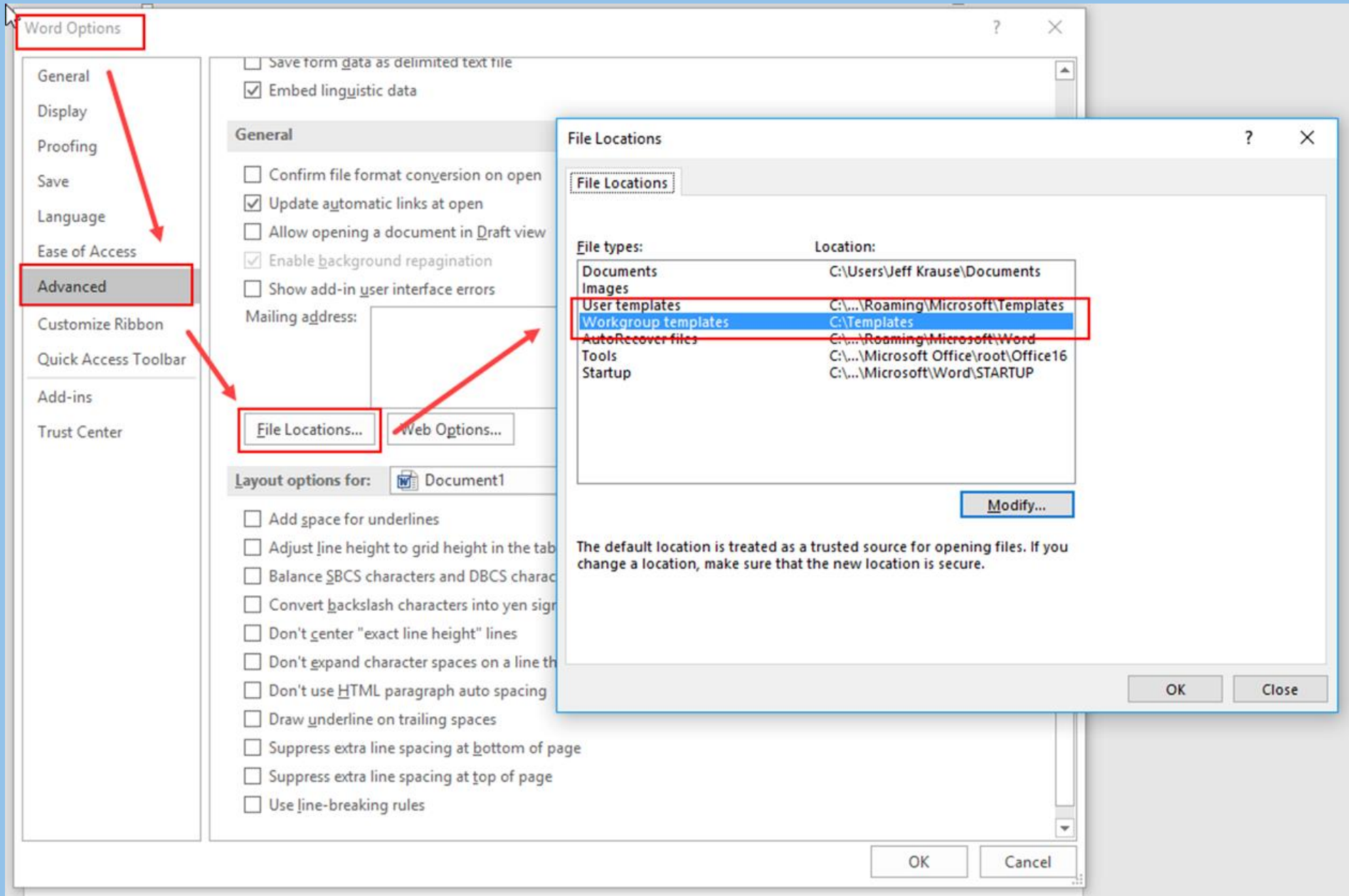
Demonstration of Building Blocks



Sharing Your Building Blocks

- You can share Building Blocks by:
- Saving them to a template file (.dotx or .dotm) and saving that template to your “Shared Templates” directory
- I use a file called Legal Building Blocks.dotx





Fields

- Special codes to insert information into a template

March 6, 2000

ATTORNEY-CLIENT-PRIVILEGED AND ATTORNEY WORK PRODUCT

Via Certified Mail

Bill Gates
1234 Main Street
Anywhere He Wants, WA 98789

Re: → [Click here and type](#)

Dear Bill:

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

ATTORNEY-CLIENT-PRIVILEGED AND ATTORNEY WORK PRODUCT

Via Certified Mail

{SET ClientName {FILLIN "Enter Client Name" } {REF ClientName } }

{FILLIN "Enter Client Address" }

Re: → {macrobutton noname *Click here and type* }

Dear {FILLIN "Enter Salutation" }:

Client name is: {REF ClientName }



Types of Fields: Result

- Result Fields: Date, Filename

5/17/2013



Result

{ DATE \@ "M/d/yyyy" }



Field



Types of Fields: Marker

- Marker Fields: Index Entry, Table of Authorities Entry

```
Smith·v·Jones,·210·U.S·127·(2005) {TA} | "Smith·v·Jones,·210·U.S·127·(2005)"  
\s·"Smith·v·Jones,·210·U.S·127·(2005)"·\c 1 }¶  
  
Working·with·fields {XE "fields" }·is·fun!¶
```

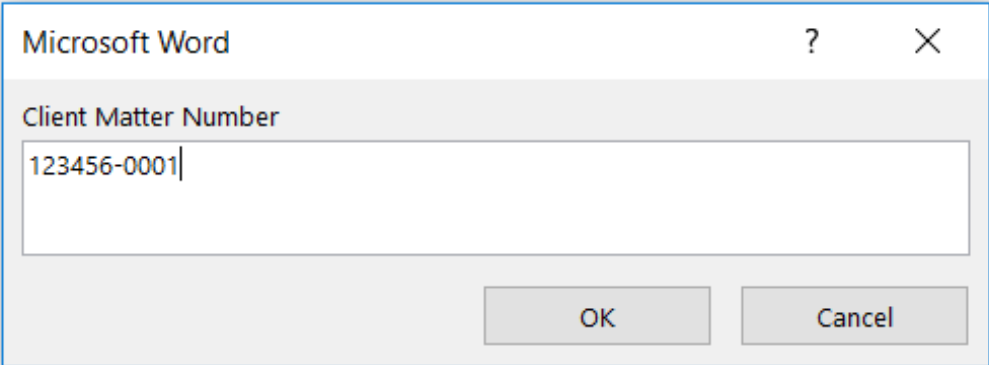
Index marker field

Table of authorities marker field

Types of Fields: Action

- Action Fields: Ask, Fill-in, Macrobutton (“Click here and type”)

`{·FILLIN·"Client·Matter·Number"·}`



Microsoft Word

Client Matter Number

123456-0001

OK Cancel

123456-0001

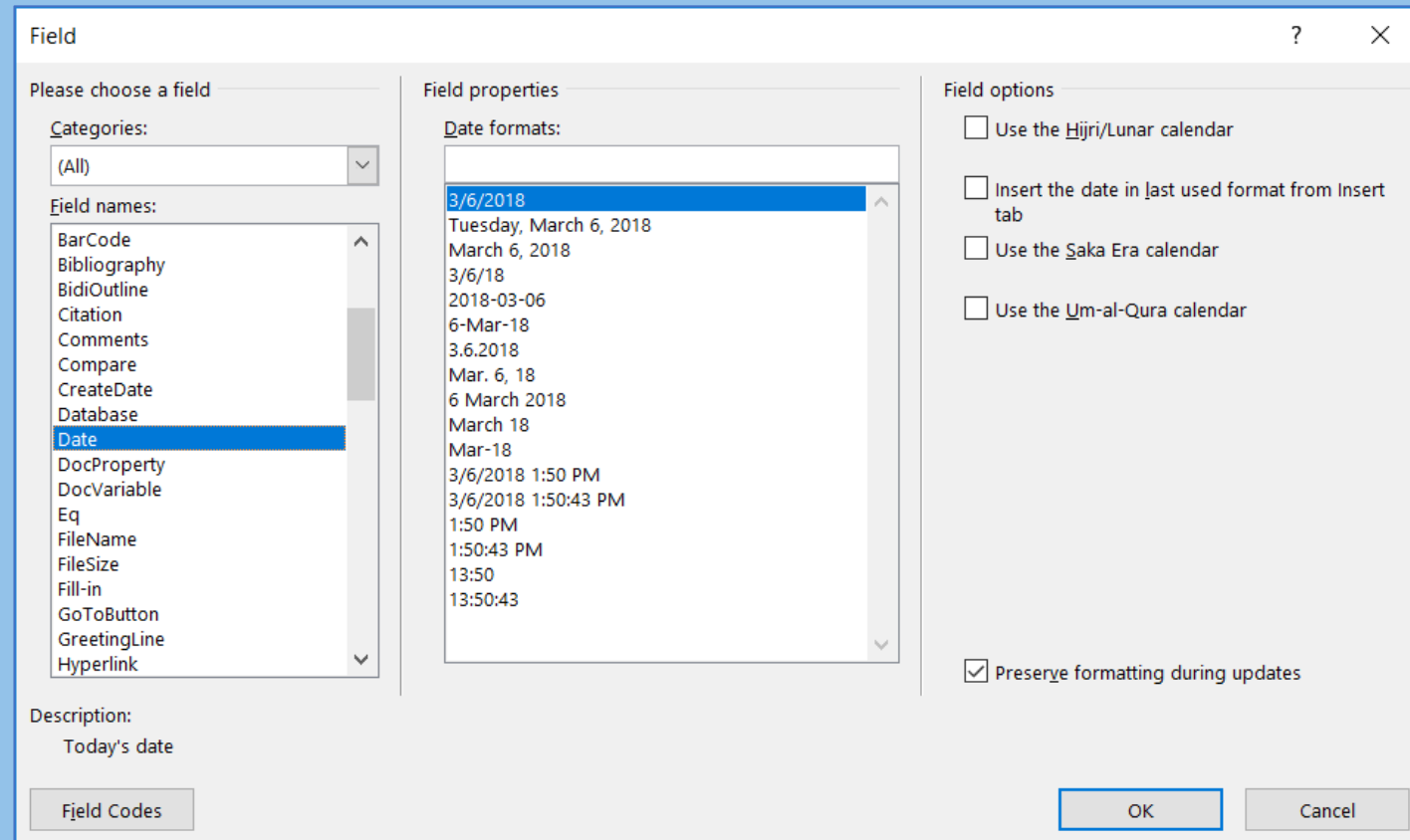
`{·SET·CMNo·{·FILLIN·"Client·Matter·Number"·}`

`{·REF·CMNo·}`

Use the SET and REF fields if you want to use the same data more than once in the document.

Insert a Date Field

1. Click **Insert**.
2. In the *Text* group, click **Quick Parts** and select **Field**.
3. Select **Date** from the list.
4. Select the desired *Date Format*.
5. Click **OK**.



Demonstration of Fields



Document Templates

- Saves document wide properties such as:
 - Margins
 - Headers
 - Footers
 - Styles
- New documents created from the template include all of these document properties
- Example
 - A “Letterhead” template that includes firm logo, attorneys, contact information, etc.



Putting It All Together

- Document templates can also include:
 - Macros
 - Fields
 - Building Blocks



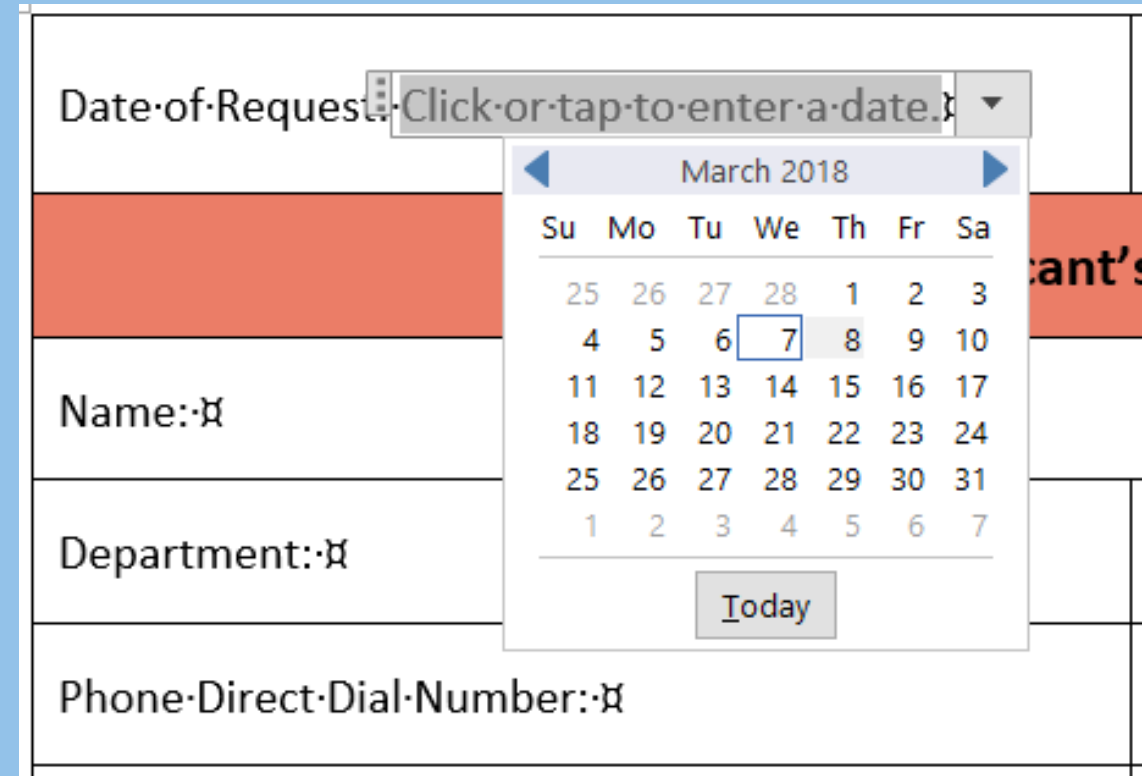
Demonstration of Using Templates



One Step Further

- Content Controls

Individual controls - including check boxes, text boxes, date pickers, and drop-down lists - that you can add and customize for use in templates, forms, and documents



The image shows a screenshot of a form with several input fields. A date picker is open over the 'Date of Request' field, displaying the month of March 2018. The date picker shows a calendar grid with the 7th of March highlighted. The form fields are labeled as follows:

- Date of Request: Click or tap to enter a date.
- Name: [text box]
- Department: [text box]
- Phone Direct Dial Number: [text box]

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today



TECHSHOW2018

- YOU play the most important part in keeping TECHSHOW exciting. *Please complete the Speaker evaluation before you leave.*
- Reserve the dates!

TECHSHOW 2019: February 27 – March 2, 2019