Creating and Using Microsoft Word & Excel Forms

with Synergis Adept

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Introduction

In many situations, you may want to use MS Word or Excel forms to track and manage important work processes. When you combine the MS Office suite with Adept, you can add even more power. Synergis Adept will of course manage and track the documents themselves. In addition, you can set up Adept to automatically extract key pieces of data from your MS Office forms, and store the data in Adept's searchable, sharable database.

These files already include a number of predefined properties such as Author and Number of Pages. In addition to these predefined properties you can add other properties particular to your documents, for example tracking Engineering Change Notice data inside Adept based on the values entered into the corresponding Microsoft Word file.

To learn how to make the most of this synergism between Adept and Microsoft Office, note the following instructions. Over the years, Microsoft Office has changed the way it manages user controls such as text boxes and calendars. This document includes instruction for what are now known as Legacy Controls, as well as the newer ones called Content Controls.

NOTE: Updating a Microsoft Office 2007+ document from a workstation with Microsoft Office 2003 software (with Office 2007/2010/2013 compatibility installed) will put the document into Compatibility Mode and will disable all 2007/2010/2013 commands which includes disabling the linked fields within the document. For this reason, we recommend that anyone performing updates to Office 2007/2010/2013 documents have Microsoft Word or Excel 2007/2010/2013 installed on their workstation.

Creating Forms in Microsoft Word

To create a form in Microsoft Word, you will first need to add the field controls. Then you will have to link these fields to the Synergis Adept database.

Before You Create Data Controls in MS Word

1. Use an existing standard document or create a new document using the File New command.
2. In preparation, you must turn on the Developer Ribbon Bar. The mechanism for doing so has changed from one version of MS Word to another. If the instructions listed below do not match your version of MS Word, search the Internet for "How to Turn On Developer Ribbon Bar in MS Word." For example, click here to check out this resource:
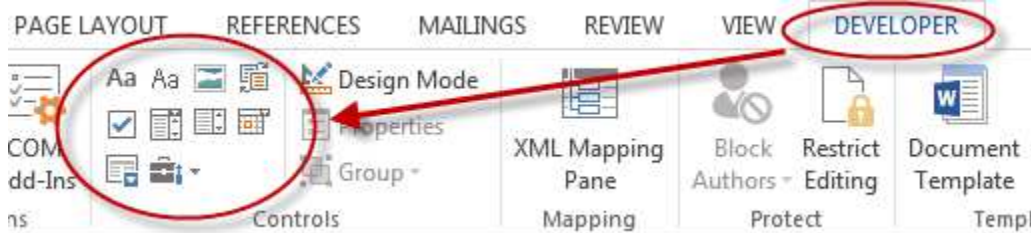
   To access the form-building features in Microsoft Word 2010 begin by clicking the File button in Ribbon Bar. Then click the Options button in the menu.
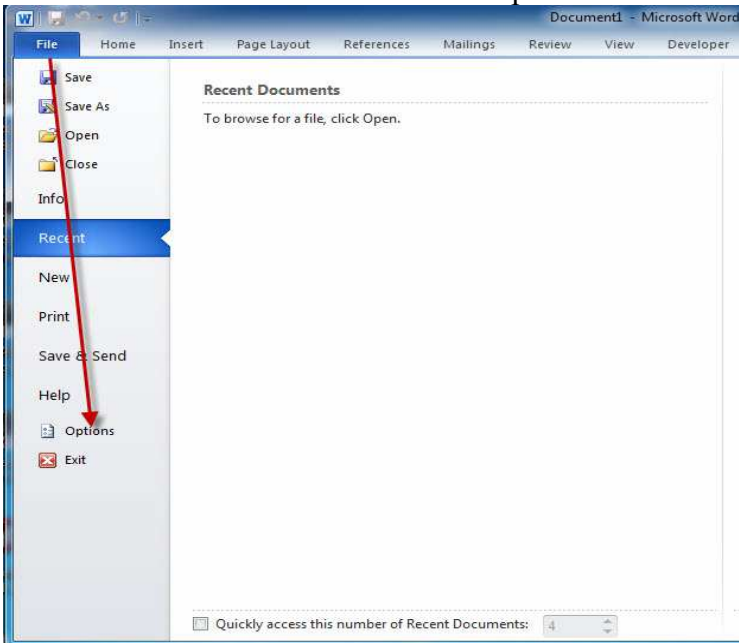
3. From this dialog click the 'Customize Ribbon' tab to enable the 'Developer' option. Then click OK.
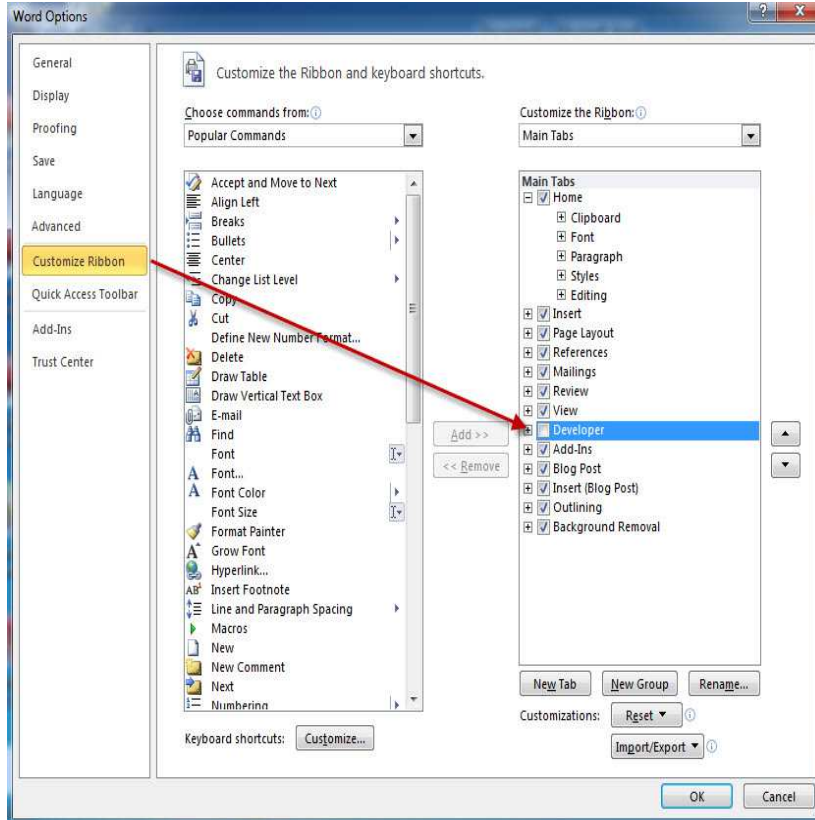
4. Next, go to the Ribbon Bar and select the Developer tab.

5. The Developer Ribbon Bar contains two generations of tools for entering user input: Legacy Tools and Content Controls.

6. Legacy Tools are the older generation of data input. They are recommended for integrating with Adept 2014 and before.

   The other buttons in this panel insert the more modern generation of input controls, called Content Controls. In order to use Content Controls, you must be working in a Word file saved as a "docx" file, and ideally you will be using Adept 2015 or greater.

Adding Form Fields with Content Controls

Microsoft Word has introduced a new set of form controls called Content Controls. You can use these to accept user input in text strings, check boxes, or dropdown lists. The following example demonstrates the text string control.

1. In a Microsoft Word document, place your cursor where you want to insert the field. Then from the Developer Ribbon Bar, select the Content Control for text input.
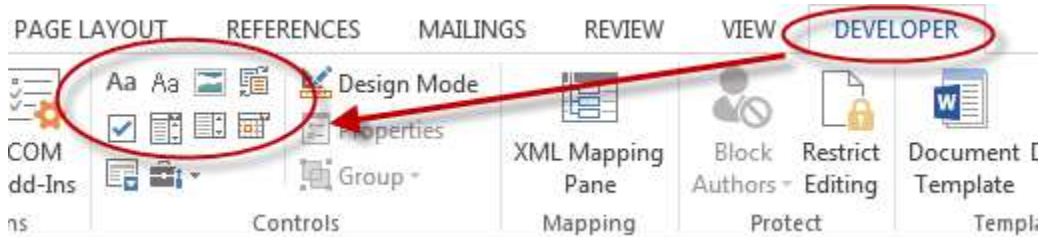
The input box is inserted into your document at the location of your cursor.
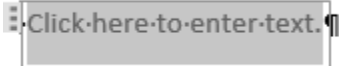
2. Add a text description to inform the user what information belongs in this field.

3. When users enter data into this field, Microsoft Word adds that value into an internal variable. Your next task is to make the value that is inside the Word file available to Adept. To do so, click the field, and then in the Developer Ribbon Bar, click the Properties button. The Content Controls dialog box appears.
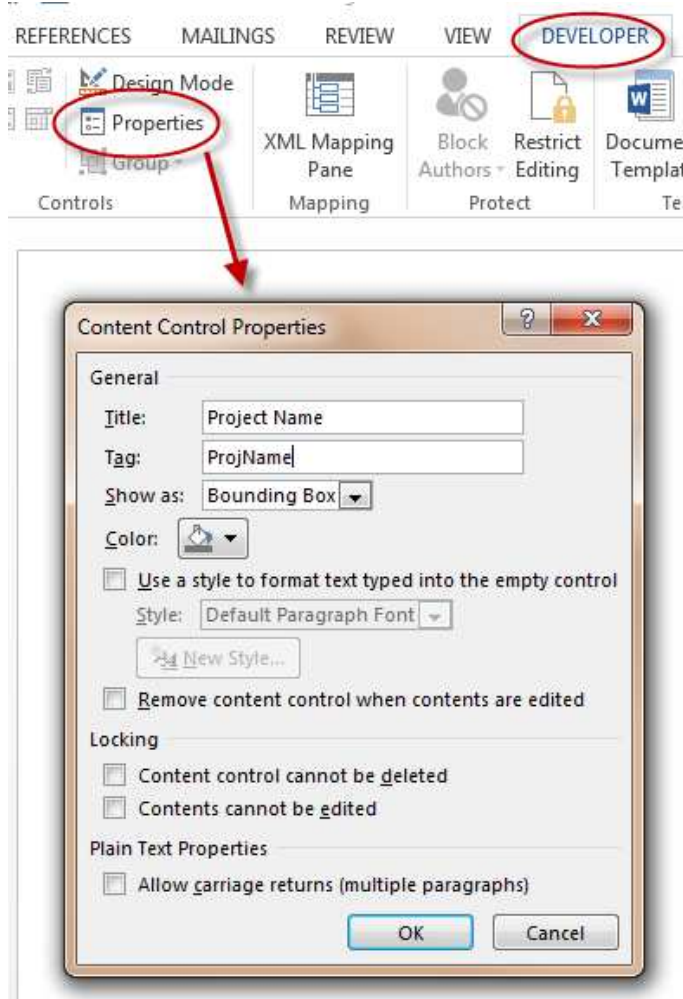
In the Content Controls Properties dialog, enter in a name to designate the field. Also fill out a name for the Tag. The Tag is important for linking this field with Adept, so use a Tag name that will indicate the purpose of this field.
Click OK.

If you are going to extract this value in Adept 2015, there are no further steps to take. This field is ready for linking.

Now, in Adept, when you use the Property Scanner in the MS Word PlugIn, Adept will be able to detect the value you entered into the Tag field, in this case ProjName.

If you are going to extract these values in versions of Adept previous to Adept 2015, you must follow additional steps.

Additional Steps for Content Controls If You Use Adept 2014 and Before

4. If you are using Content Controls with Adept versions 2014 and before, you must perform additional steps in order to link the data in the Content Control to Adept.

After closing the Content Control Properties dialog, navigate to the Insert Ribbon Bar, and select Bookmark.
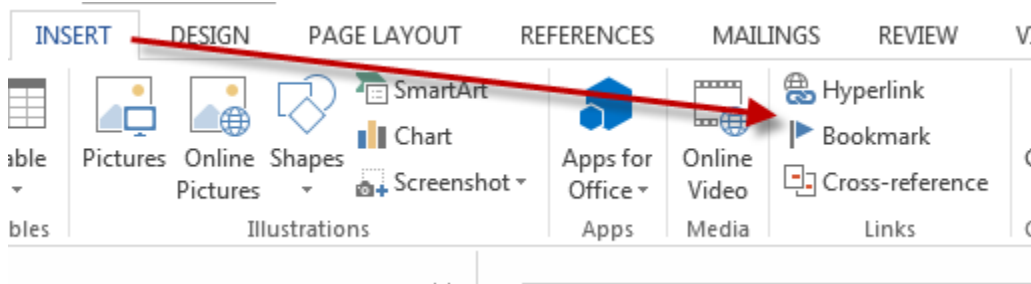
In the resulting dialog, type in a bookmark name that you will use to identify this field. In this example, we are using ProjName. Then click Add and Close.
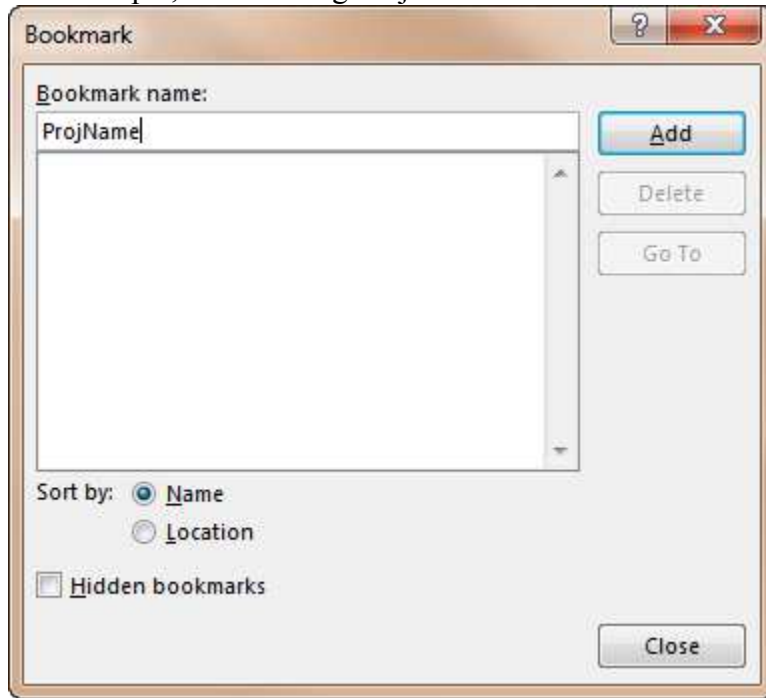
5. Now that you have added a Bookmark to the field, your next task is to create a Custom Property for this field. To add the Bookmarked field to a Custom Property, follow the instructions provided later in this document.

Making Form Fields with Legacy Tools

When creating a form field with Legacy Tools, the first step is to open the Developer Ribbon Bar and locate the Legacy Tool buttons.


1. To add the data field, go to the area in the document where users will enter data. For a **Character Field** click the ![ab] button on the Developer Ribbon Bar.

This now creates a field on your document. This will be the field into which the user types a value.
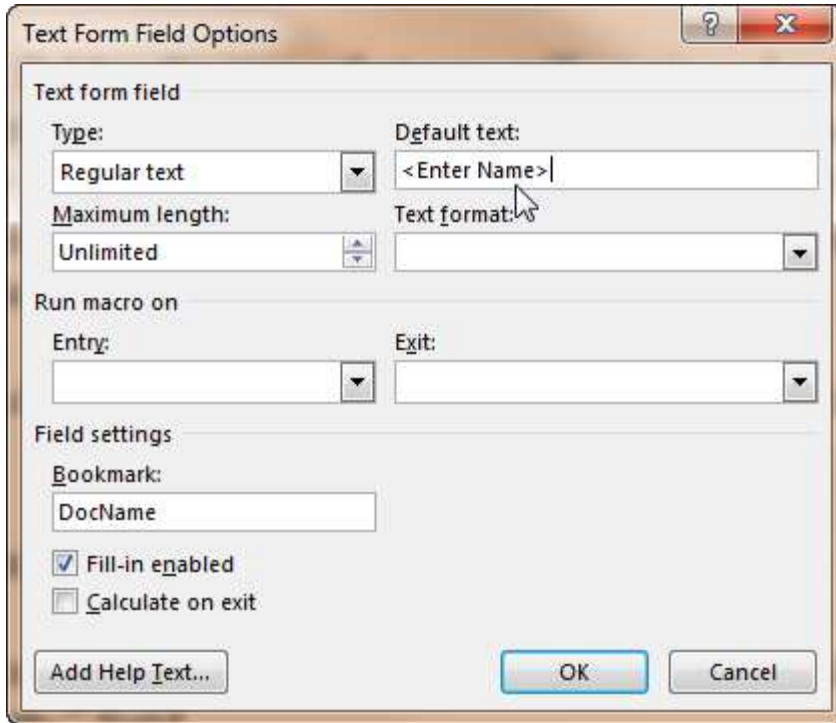
2. Type the label that instructs users about what information they should type into the field. For example:

    Name:

3. Next define the properties for this field. In order to do this, select the new field and click Properties from the Developer Ribbon Bar.
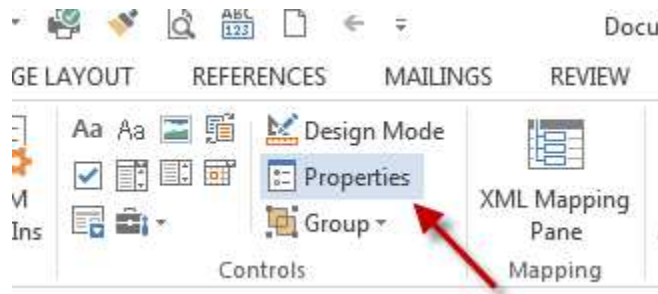
The Text Form Field Options dialog box appears.

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a. If you want to display default text, enter it into the "Default text:" field.

b. The Book Mark field is the name that you will use in order to extract the value from this Word file into Adept. Type in a name that accurately describes the value of the field. The name you type in here will be displayed in Adept when you are ready to link this document to Adept's database, so be sure to use a unique, and easily identifiable name.

   NOTE: Do not duplicate the name given to these bookmarks within the same document.

c. Check the option: "Fill-in enabled."

d. You may also want to limit the width of the form field. To do so, enter a value in the "Maximum length:" field.

e. You can leave the "Text format:" field blank to maintain the existing formatting.

f. Click "OK" to close the Text Form Field Options dialog box. After you close this dialog, the default text will be displayed.

   Name: <Enter Name>

g. Since you left the "Text format:" field blank, you can now add underlining or bold, for example, with the Microsoft Word formatting controls. For example, here is the same entry field with the underline formatting

Name: <Enter Name>

Add a Legacy Drop-Down Form Field

The **Drop-Down** Form Field is another Field Type that you might want to choose

a. For a Drop-Down Form field, click the [image] button on the Developer toolbar.

b. Add some text to describe the field. For example,

Document Type: [   ]

c. Now, select the field and click the Properties button on the Developer Ribbon Bar, as described above. In the Drop-Down Form Field Options dialog, fill out the Bookmark. As before this will be important for linking to Adept.

d. Next, create a list for the Drop-Down field. Do this by entering each item in the "Drop-down item:" field and then click Add to move it into the list. You can change the order of the list using the up and down arrows on the right.

The top entry in the list will be used as default text. Look at the following example.

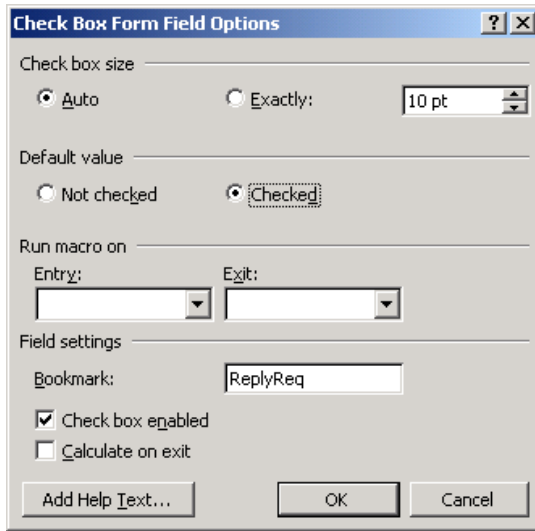e. Click the OK button.

Document Type: <Enter Doc. Type>

Add a Legacy Check Box Form Field

A **Check Box** Form Field is also a Field Type that may be chosen.

a. Click on the [✓] button on the Developer Ribbon Bar and add a text prompt. For example:

Reply Requested: ☐

b. Now, select the check box and click Properties in the Developer Ribbon Bar.

c. Choose the default value, that is, if the check box will be checked or empty by default.

d. In the Bookmark field, enter the name you will use for this value in order to link to Adept.

e. Click OK, and it will look like the following:

Reply Requested: ☒

Linking Bookmarked Form Fields to Custom Properties

In some cases, Adept is unable to detect the fields you enter into a Microsoft Word file. These cases are:

- In MS Word 2003 and older, Adept cannot see the values of these fields directly. You must link them to Custom Properties.
- If you are running a version of Adept 2014 and older, and if you are using Content Controls, you will need to perform an extra step to link the field to a Custom Property.

If you have files that match either of these criteria, you must link the Bookmarked field to a Custom Property. The procedure to do so might vary slightly from one version of MS Office to another. In Microsoft Word:

1. Click the File tab
2. On the resulting page, select Info
3. Click the word Properties.
4. Click the button, Advanced Properties

Here is the resulting dialog:
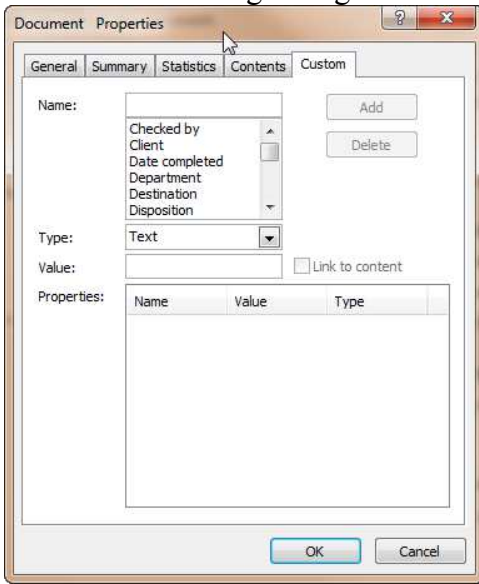
Note the tabs across the top of the resulting dialog. Click the one labeled Custom.

5. In the Name field, type in the name of the Property that will become visible to Adept. In this example, type DocType into the Name field.

    Check the option "Link to Content". After you check this check box, you will be able to select from your named Fields by selecting from the "Source:" drop-down list. The fields named in this list are the same names as you gave them in the Bookmark field when you created the controls.
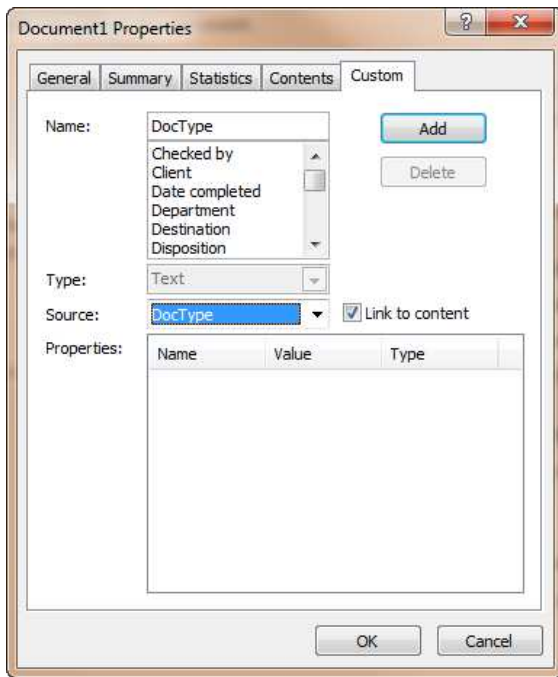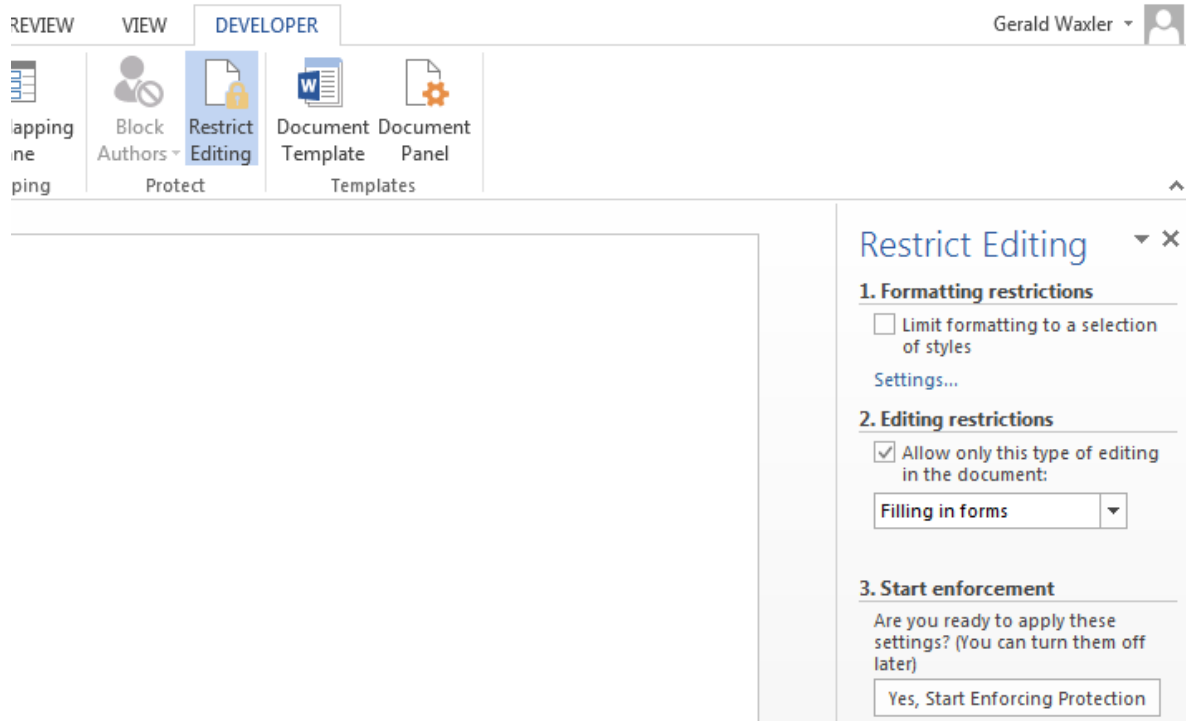
6. Click the "Add" button. The property will appear in the bottom section and have a link icon beside the property as shown below.
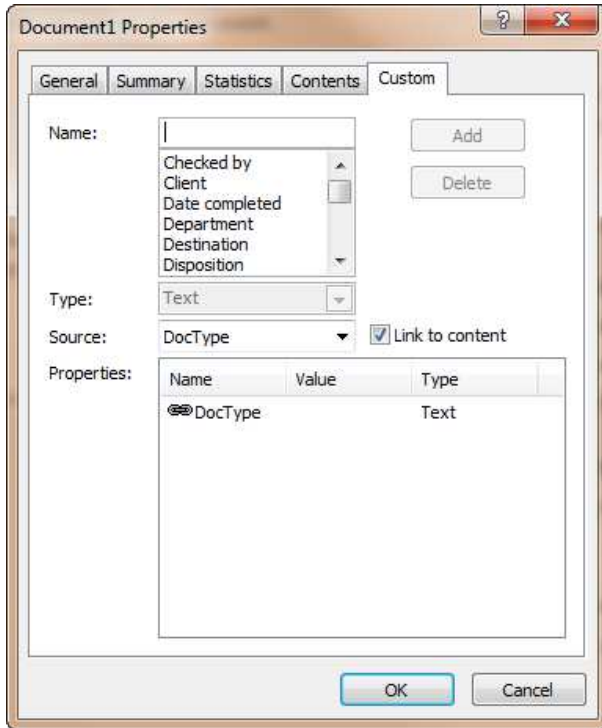
If at some point the link is broken the icon will appear like this.

7. Do the same for all properties you would like to link to Form Fields. You don't have to link all of the Fields to properties. Only link what you would like to extract into Adept.

8. Click OK.

9. When you have finished setting up the form and are ready to distribute it to users, you can lock the file so that the only changes permitted are ones which fill in values. To set the document protection in this way, select the Developer Ribbon Bar, and select Restrict Editing. In the resulting panel, under "Allow only this type of editing in the document," select "Filling in forms."

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The document is now protected, and users will only be able to edit the Form Fields you created. Users will be able to tab from one field to the next and enter information as needed.

Creating Forms in Microsoft Excel

Because Microsoft Excel documents hold a piece of data in each cell, an Excel spreadsheet is an ideal place for data input. And the link between Excel and Adept is simple. You simply need to define a name for each cell you want Adept to know about. These defined names will appear in Adept, when you execute the Adept Excel PlugIn. During that operation, you will link the Excel cell name to Adept Extraction fields.

In order to inform the user of what data needs to be entered, type the label name in one cell. The user will then know to enter the data value in the cell to the right. To set up your form in Excel, follow these steps:

1. For example, set up a form to let a user enter a value called Document Type. The first step is to enter the label "Doc. Type" into an Excel cell, so the user will know what to enter. In this example, enter "Doc. Type" in cell A1.

   Now, the user will understand what value they are supposed to enter.

2. In this example, the cell immediately to the right of the label will be used for data entry. The user will enter data into B1. To set this up, you need to define a name for cell B1.
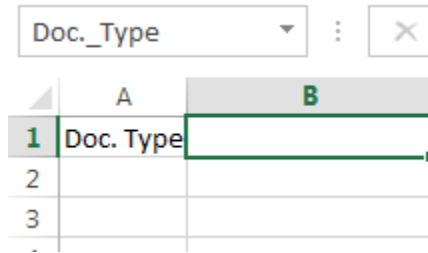
   To give the cell a name, right-click in B1 and in the resulting right-click menu, select "Define Name…"
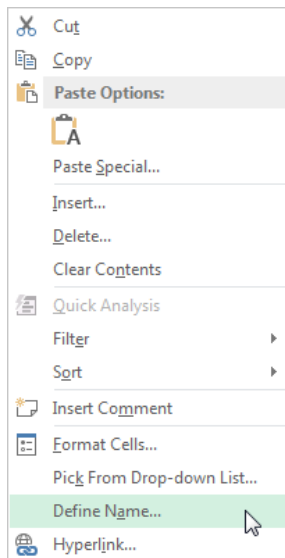
   In the resulting dialog, type a unique name for the cell. For example, call this cell "Doc._Type"
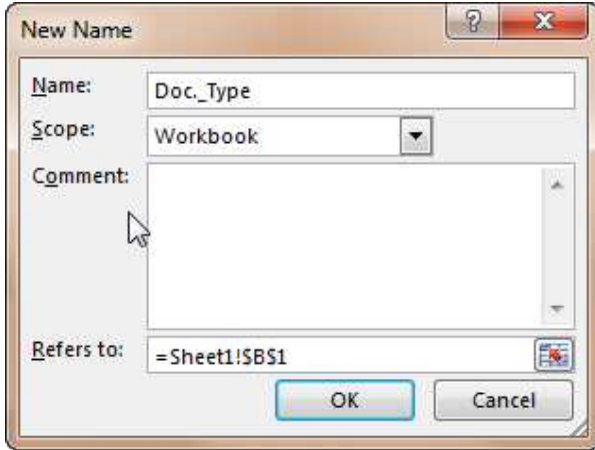
Click OK. Now, when your cursor is in cell B1, the cell name box above the grid shows the name you gave that cell.

By defining the name of cell B1 as Doc._Type, you are now making that cell's value available to Adept. When Adept scans this Excel spreadsheet, you will link the cell named Doc.Type to an Adept Extraction Field, and Adept will be able to extract the value a user enters in field B1.

3. Repeat this process for all cells you would like to extract.
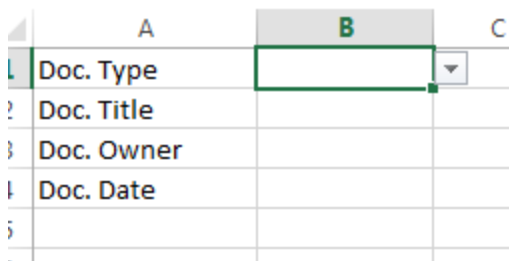
Additional Tip: Create a Drop-Down List

To make it easier to enter data in your Excel form, you may wish to create a drop-down list. Drop-down lists prevent typos, and improve consistency in your data entry. To create a drop-down list in Excel, follow these instructions.

1. First, select an unused Sheet tab. In this case, we will use Sheet 2 and rename it. In this example, we will rename the sheet to "List Values"
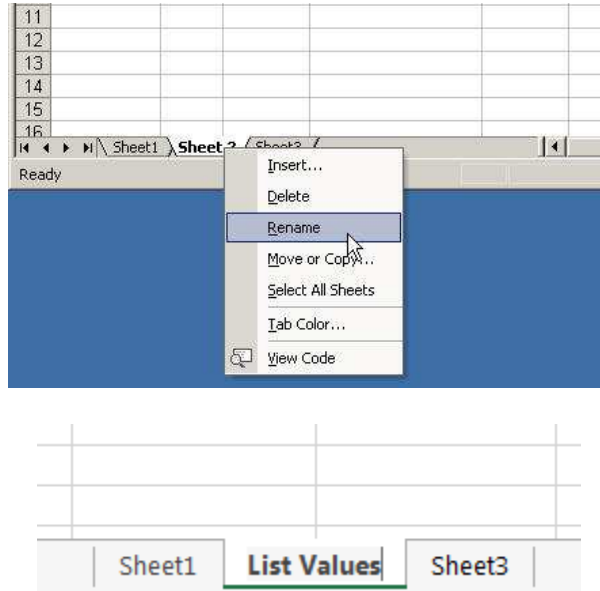

2. To help keep your lists organized, type a header for the list, such as DocTypeList, pictured in the screen shot below. Under your header, make the list of values that should appear in your drop-down list.


3. Now highlight the list, including only those cells that will appear to the user. Then right-click. From the right-click menu select "Define Name."

4. In the "Define Name" dialog, name the list. For example, call it DocTypeList, as shown below.
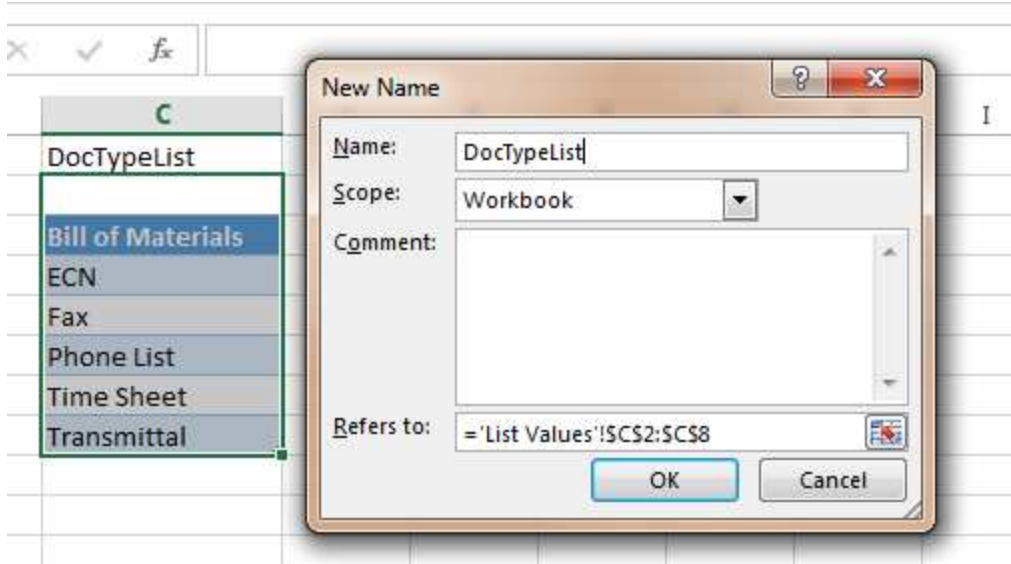
NOTE: If you need to change one of your defined names, use the command "Manage Names" in the Formulas Ribbon Bar.
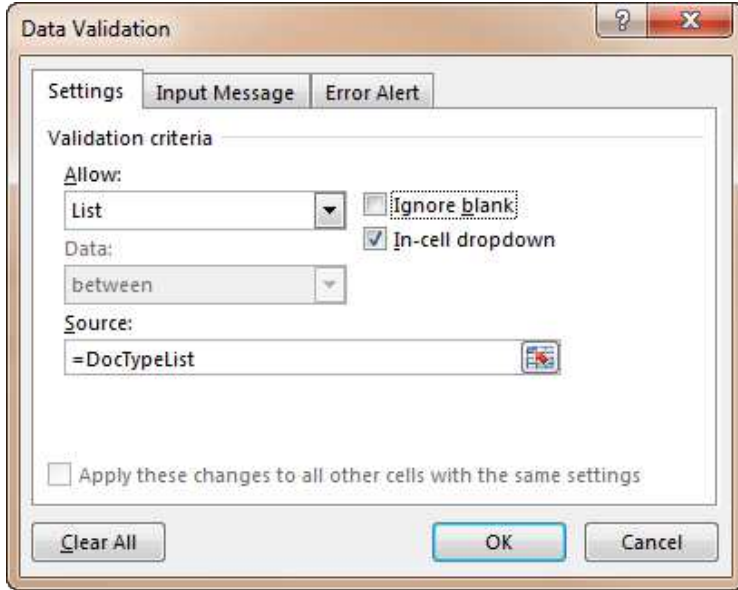
5. Click the sheet that contains your standard document layout and highlight the field where you want your users to enter data.
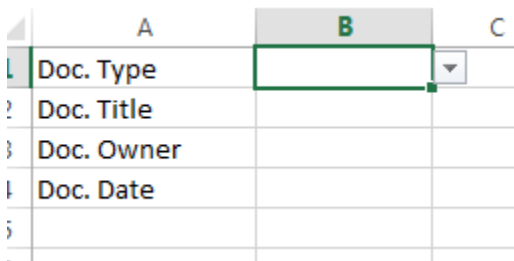
6. Next, link the field, in this example, B1, to the dropdown list defined on the List Values tab. To do so, select cell B1, and in the Data Ribbon Bar, select Data Validation.
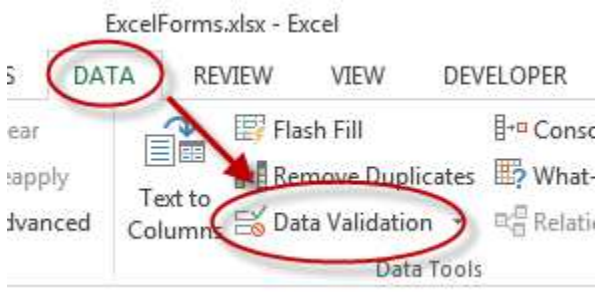

A dialog box will appear.

7. In the "Allow" field, choose "List". In the Source field, type an "=" sign followed by the defined name of your list. In this example, the value list on the List Values tab was called "DocTypeList". Check the "In-cell dropdown" option checkbox. Choose OK.

8. As you can see below, the cell is then activated as a Drop-down with the list of choices in the value list that were created and linked to this cell.


9. In Adept, when you are ready to link the value of "Document Type" from this form to your Adept extraction field, be sure to link to the cell where users are entering data, rather than the name for the List. In this example, the DocTypeList is simply the list of values. The name of the cell that contains the user-selected value is listed as a "Named Location" called Doc._Type.
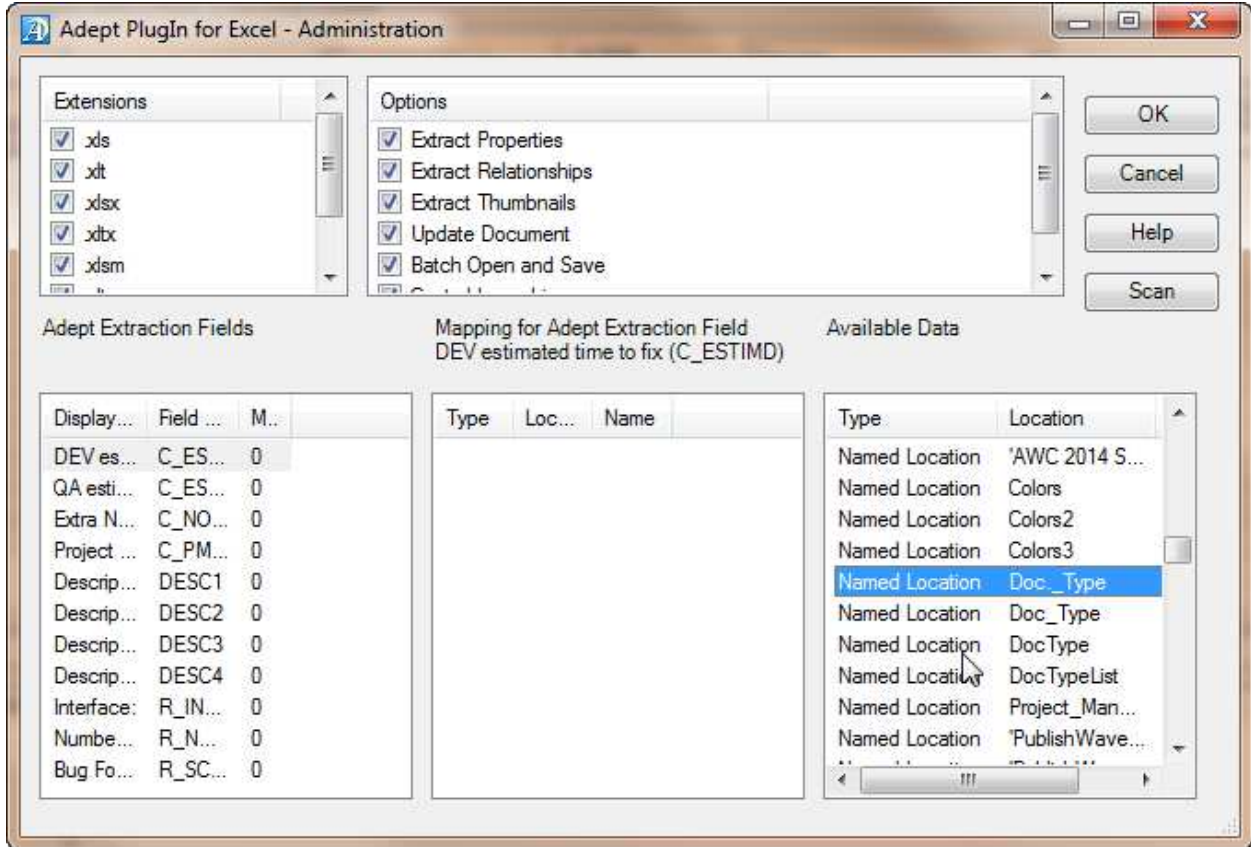
10. If you want to include a blank in your list, this will give users the opportunity to clear out the value by selecting the empty value. To do so, simply include an empty cell at the top of your value list when you define the named list.

Be sure that the option to "ignore blank" is unchecked in the Data Validation dialog box you used to set up the drop-down list.
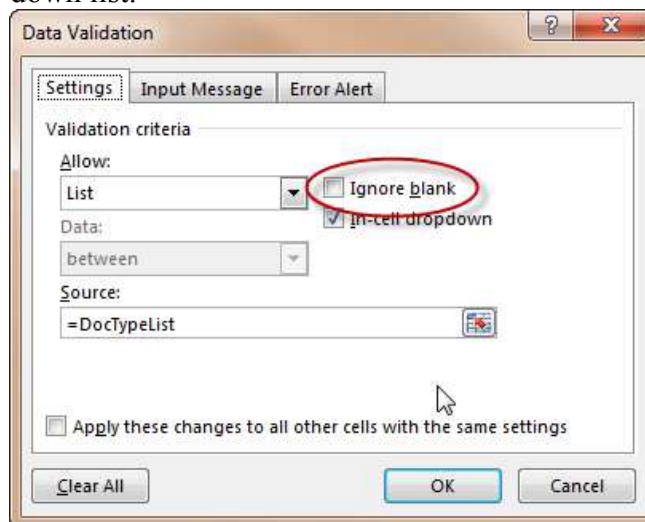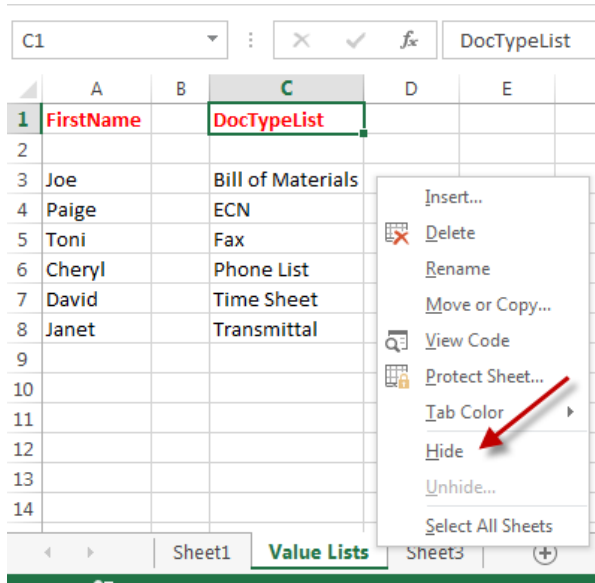
Organizing multiple drop-down lists

1. All of your value lists can be created on the same Sheet in Excel. Just be sure to organize each one with a header such as in the screenshot shown below:


2. Because users never need to edit these lists, you can prevent accidental changes by hiding the Sheet where they are stored. To do so, right click on the Sheet name and select "Hide."
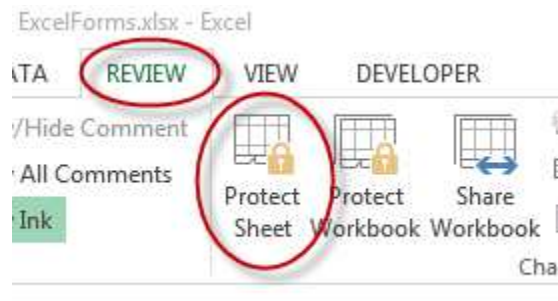

Protecting Excel forms

You can protect your Excel forms so that users can only edit the form fields, but not change anything else in the document.

1. To do so, first select the cells you want to remain unlocked. Then right-click and select "Format Cells." In the resulting dialog, select the Protection tab. Be sure the field "Locked" is clear.
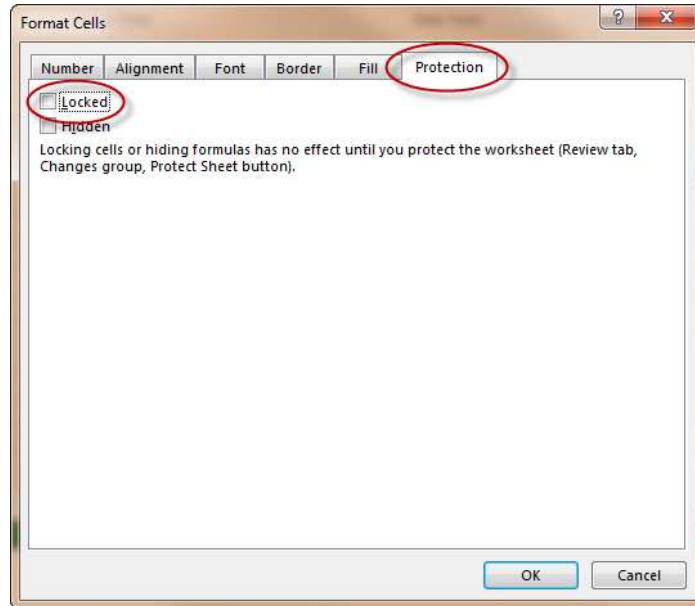
Click OK.

2. Next, in the Review Ribbon Bar, select Protect Sheet.

If you add a password, only you can unprotect it.

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Link Your MS Office Fields to Adept Fields

After you have deployed MS Word or Excel forms to users, they will begin to process the forms. When completed documents are signed in to Adept, Adept will extract the values from the fields and copy them into the appropriate Adept Custom Fields. To create the connection between fields in your MS Office files and fields in Adept's database, you need to set up the Word PlugIn or the Excel PlugIn.

1. To configure the Word or Excel PlugIns, run Adept and from the Admin menu select "PlugIn Administration." From the flyout menu select either "Word…" or "Excel…" For this example, we'll show screens from the Microsoft Word PlugIn.

2. In the top left panel, check the file types you are interested in. In the top right panel of the Word PlugIn, be sure "Extract Properties" is enabled in order to pull data from Word into Adept. Also enable the option to "Update Document" if you want Adept to be able to update the value of the Word field.
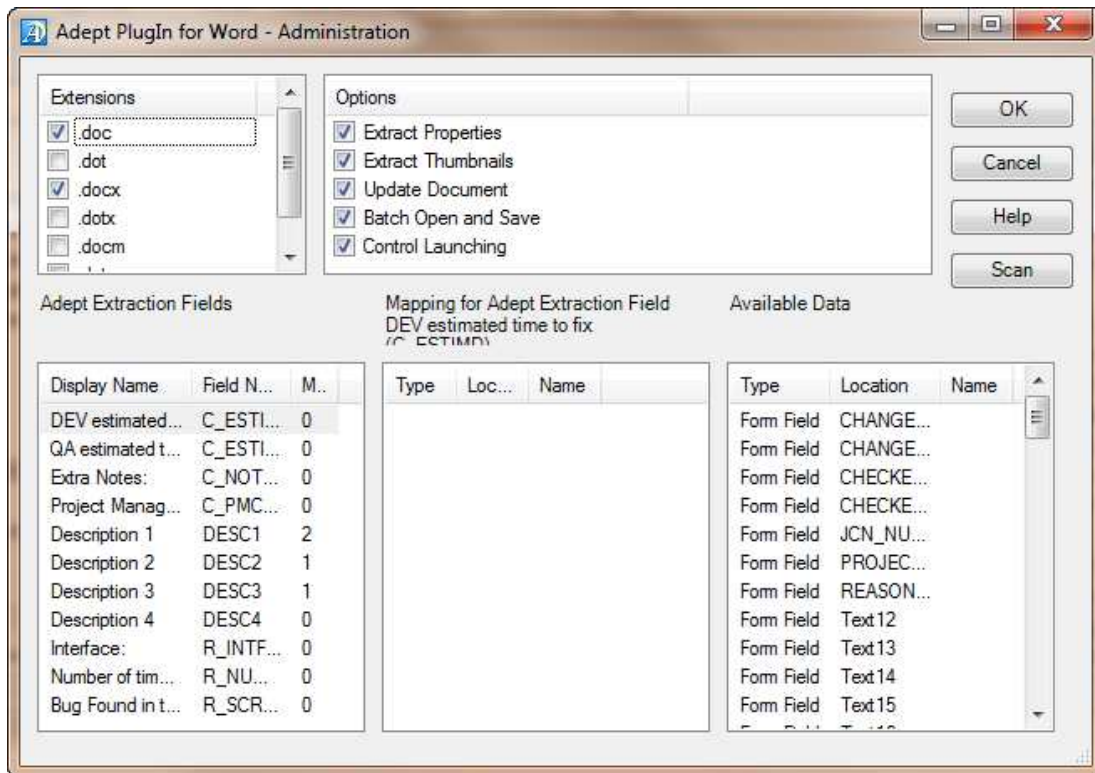
3. The bottom left panel lists the Extraction Fields you have already set up in your Adept database. The bottom right panel lists all the fields that the PlugIn will extract from Word files. Adept creates this list of Word properties by scanning sample Word properties and compiling a dictionary of available field names. Your next step is to add the fields you have added to your MS Word files. To do so, click the Scan button.
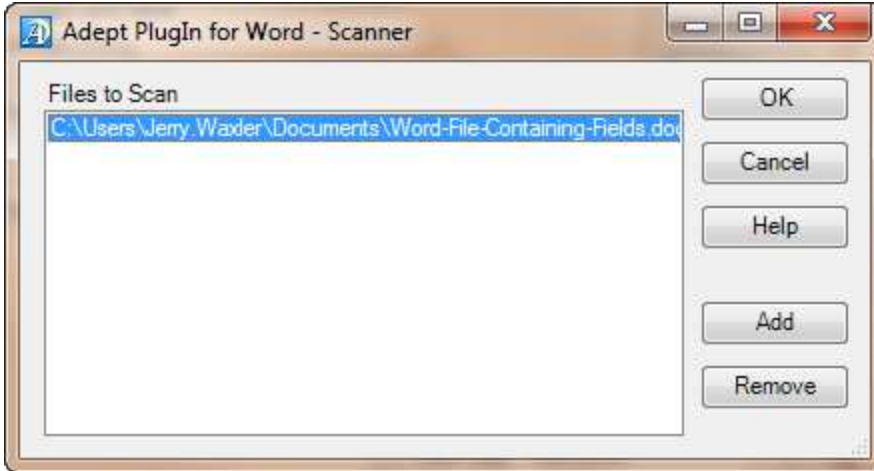
4. The resulting Scanner dialog lets you add files that Adept will scan. In the Scanner dialog, click the Add button to browse to an MS Word file that contains the tags or custom properties that you want to retrieve. When you click OK, Adept will scan the files. The resulting list of fields is displayed in the lower right column of the dialog.

5. After scanning, you can then match fields in Adept with fields in your Microsoft Word files. For example, select Project Manager on the left column. Then in the right column, select the Word field to which you want to link. Then right-click on the MS Word field and select Map. The mapped link appears in the center column, and the link is established. When you have linked all the matched pairs, click okay.
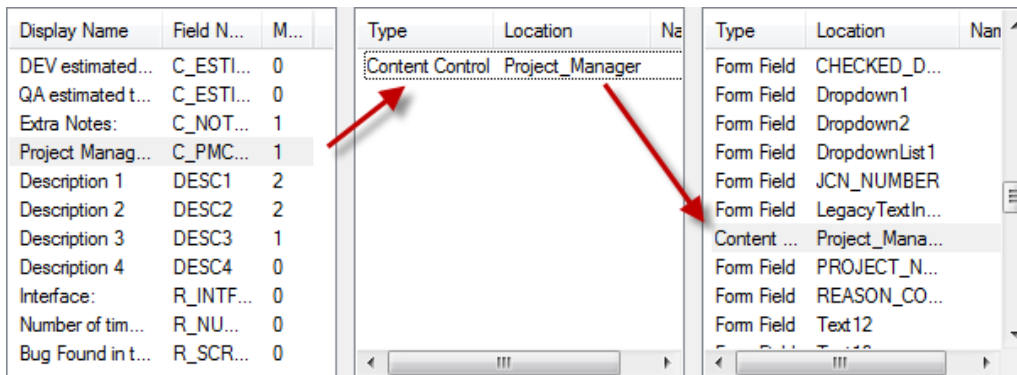
After performing these steps, when you sign in the file, or otherwise trigger an extraction, the value of linked fields in Word are copied into their corresponding fields in the Adept database.

You can link Adept fields with Microsoft Excel cells the same way, using the Excel PlugIn.