



Content Controls

Module 5 – Templates and the Word Add-In

Version 1.0

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1. About Content Controls

1.1 What are Content Controls?

Word uses content controls to process the data entered into Smarter Drafter questionnaires. Content controls interpret the data entered by the filler and can:

- Insert data into the template.
- Manipulate and convert how the data is inserted.
- Apply conditional rules to control when data is inserted into the template.
- Convert selected list options to ticked / unticked checkboxes.
- Insert data from your SD company account profile.
- Insert details of the contacts in your address book and users on your account.
- Interpret repeating data and determine how to insert it into the template.
- Insert single source / shared data and images.
- Control the dimensions of images that fillers select to upload into documents.
- Connect attachments that are being generated separately with the document.
- Apply formatting controls to automatically design the layout of data.
- Insert placeholders in documents for the insertion points of e-Signature signee details.

1.2 How to Identify Content Controls in Templates

Note: Always have design mode turned on to see the content control brackets.
Always have paragraph formatting revealed to see where you're applying content controls.

The content controls appear in different colours, depending on the type of data that is being brought in or the type of feature that has been applied. You don't need to select the colour; this will automatically be determined by the type of field and feature used.

This is the colour code table for the types of content controls available:

Yellow	Applied formatting <ul style="list-style-type: none">• Apply formatting controls to repeating data
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	<ul style="list-style-type: none"> • Apply separator • Available in the 'more' menu in the Word add-in
Orange	Checkboxes <ul style="list-style-type: none"> • Convert a select field (radio/drop-down/select) response to a ticked/unticked checkbox • Requires a conditional rule to apply the conversion • Available in the kebab menu of the conditional rule in the Word addin
Pink	Company fields from your account/profile <ul style="list-style-type: none"> • Insert company fields from your account • Available in the 'More' menu in the Word addin • Insert company logo, set dimensions for maximum size
Red	Repeats <ul style="list-style-type: none"> • Instruct Word on how to handle repeating data • Requires a conditional rule to identify the data to be repeated
Purple	Snippet / Global templates <ul style="list-style-type: none"> • Insert snippets and dynamic snippets into templates • Available in the 'More' menu in the Word addin
Dark Blue	Uploads <ul style="list-style-type: none"> • Upload images into templates • Insert images, set dimensions for maximum size
Light blue	Conditional rules <ul style="list-style-type: none"> • Conditional rules – rules to control automation behaviour in Word • Create rules to determine how data is handled in the Word template
Light green	e-Signatures <ul style="list-style-type: none"> • Inserts the placeholders for when the document is sent for e-Signing • Ensures set-up for e-Signing is included every time the document is generated
Green	Fields <ul style="list-style-type: none"> • Standard field • Simple insertion of data entered in questionnaire • Use Word add-in to make adjustments EG convert case, select components of names, addresses and dates, change format of dates

1.3 Working With Content Controls in your Template



Content controls contain placeholder text as a marker in the template. The default placeholder text is [*] though this can be changed to reflect the expected data, EG you may want to replace [*] with [name] or [address] or [date of birth] to more easily identify what field that content control will insert.

If you leave the placeholder text as [*], you can identify the associated field by clicking on the content control and the Word add-in will reveal the label of that field as per what was used in the questionnaire.

Content controls have an opening and closing bracket. To clearly see where a content control starts and finishes, double-click on one of the brackets and the contents of that content control will become high-lighted.

This is particularly useful when working with content controls that have been wrapped around a lot of text (particularly conditional rules, repeats and formatting), or the adjusted placeholder text is lengthy.

1.4 Formatting Content Controls in your template

	<p>Doesn't include formatting</p> <p>Paragraph mark or table cell will remain whether or not the field brings in data</p> <p>To convert, place cursor inside the content control and press enter, then delete</p>
	<p>Does include formatting</p> <p>Paragraph mark or table cell will be removed if the field doesn't bring in data</p> <p>To convert, place cursor beside the content control and press space, then delete</p>

2. Content Controls – Quick Reference Guide

Yellow	Applied formatting
Orange	Checkboxes
Pink	Company fields from your account/profile
Red	Repeats
Purple	Snippets / Content blocks
Dark Blue	Uploads
Light blue	Conditional rules
Light green	E-Signatures
Green	Fields