smarter drafter PRO

by tensis

Insert Repeating Content in Templates

Module 16 - Repeating Content

Version 1.0

Table of Contents

1.   Repeating Data in Word Templates

1.1   What is Repeating Data?

Repeating Data is the ability to construct and format text in the Word template – and then have Word automatically replicate the text and format for each repeat instance entered by the form filler.

1.2   When to Use Repeating Data

Use Repeating Data when:

- a document requires all/some of the data from each repeat to appear in the same layout e.g.
  >> the parties on a court form
- the text requires all/some of the data from the repeats in a list, inline text or sorted format e.g.
  >> a bullet list of each security property
  >> a numbered list of invoices issued
  >> an ascending list of amounts owing
  >> sentence style of children and dates of birth, using commas and a separator word (and/or)
- the same document is to be issued to each repeat e.g.
  >> a letter of demand to be sent to each borrower

2.   Preparing to Use Repeating Data

The layout and coding of the template is much the same as any other template. The main difference is using conditional rule/s to instruct Word on how to handle the repeating parts.

You will use the Word Add-In to insert fields and apply conditional rules. In the **More Menu** there is also a repeat formatting tool that will be introduced later in this guide.

2.1   Conditional Rules and Content Controls

Conditional rules for repeating data use red content controls (as opposed to the usual blue content controls for ordinary conditional rules). Word recognises the repeat and alters the behaviour of the rule for repeats and sets the colour of the content controls to red.

Note: When applying conditional rules to Repeating Data, determine whether you want to specifically include or exclude the paragraph mark/table row marker as part of the repeat and ensure that the content control brackets are in the corresponding format (e.g. solid or outline).

2.2 Check the Form Build

Ensure that the associated form has been created with the requirements for Repeating Data, including:

- Ticking the repeatable checkbox in the relevant section properties
- Creating a conditional rule for each repeating section
- Creating other conditional rules for singular, plural, text concatenations, individual, company etc

2.3 Setting Up the Text and Fields

Add text to your template for the first instance of the repeat. Lay it out exactly as it is to appear for each repeat and insert the relevant fields. Then apply conditional rules to control the Repeating Data.

3. Examples of Using Repeating Data

3.1 Example – Parties on a Court Form

Output to return:

	BARNEY JOHN RUBBLE	First plaintiff
OF:	100 Blamey Street Kelvin Grove QLD 4059	
	RUBBLE ENTERPRISES PTY LTD ACN 100 200 300	Second plaintiff
OF:	1 Brick Makers Drive Via Epping Wollert VIC 3750	

Ensure you have conditional rules for:

- Plaintiff {{Repeat}}
- Plaintiff_Individual {{Repeat}}
- Plaintiff_Company {{Repeat}}

Steps:

1. Create the required table row/cell layout and set the table properties (e.g. rows not to break across page, turn off auto-resizing, as applicable).

2. In the first row, insert the text and fields for a plaintiff that is an individual.

[Individual·Name] → [Plaintiff·Title]¤

OF: → [Individual·Address]¤

3. In the second row, insert the text and fields for a plaintiff that is a company:

[Company·Name]   →   [Plaintiff·Title]¤
ACN· [ACN]¶
OF: → [Company·Address]¤

4. Highlight the entire row for the individual plaintiff, including the row end marker. By including the end marker you will ensure that each plaintiff is inserted into its own separate table row.

[Company·Name]   →   [Plaintiff·Title]¤
ACN· [ACN]¶
OF: → [Company·Address]¤

5. Use the Word Add-In to apply the **Plaintiff_Individual** conditional rule. The rule will be applied with a red content control.

Plaintiff_Individual{{Repeat}}([*])   →   ([*])¤
OF: → ([*]) Plaintiff_Individual{{Repeat}}¤

This conditional rule instructs Word on what to do with each individual plaintiff only.

6. Repeat step 4 and 5 above for the company plaintiff row.

Plaintiff_Company{{Repeat}}([*])   →   ([*])¤
ACN· ([*])¶
OF: → ([*]) Plaintiff_Company{{Repeat}}¤

This conditional rule instructs Word on what to do with each company plaintiff only.

7. Highlight both rows for the individual and company plaintiffs, including the row end markers.

Plaintiff_Individual{{Repeat}}([*])   →   ([*])¤
OF: → ([*]) Plaintiff_Individual{{Repeat}}¤
Plaintiff_Company{{Repeat}}([*])   →   ([*])¤
ACN· ([*])¶
OF: → ([*]) Plaintiff_Company{{Repeat}}¤

8. Use the Word Add-In to apply the **Plaintiff** conditional rule. The rule will be applied with an additional red content control wrapped around the whole table.
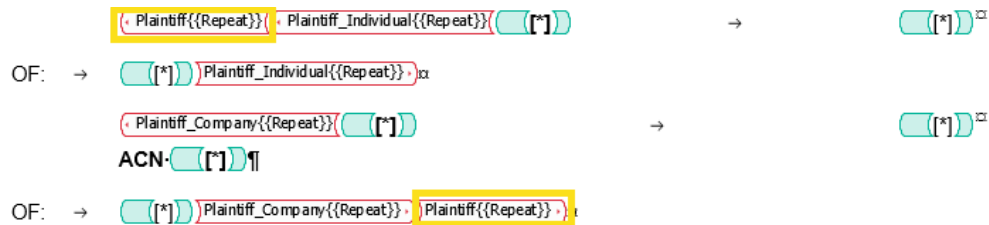
This conditional rule instructs Word to check every repeat and then to move to the individual or company rule depending on the type of plaintiff.
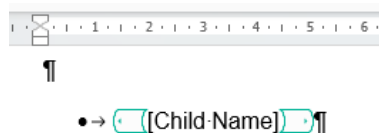
3.2   Example – Bulleted List

Output to return:

- → Bamm·Bamm·Rubble¶
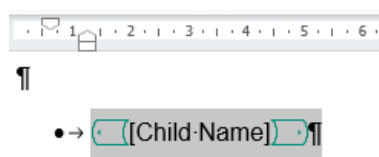- → Tomm·Tomm·Rubble¶
- → Pamm·Pamm·Rubble¶
- → Domm·Domm·Rubble¶

Steps:

1. Create the required bullet list and set format (e.g. bullet style, indents, spacing, as applicable). Only create one bullet point.


2. On the bulleted line, insert the child name field.

3. Highlight the entire line, including the paragraph return. By including the paragraph return you will ensure that each child is inserted onto a new line with a bullet point.

4. Use the Word Add-In to apply the **Child {{Repeat}}** conditional rule. The rule will be applied with a red content control.
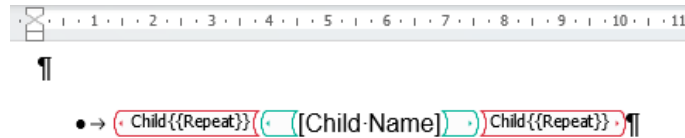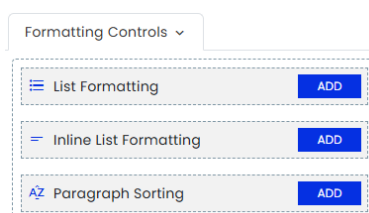

This conditional rule instructs Word on what to do with each child.

3.3   Example – Numbered List

Output to return:

1. → Bamm·Bamm·Rubble¶
2. → Tomm·Tomm·Rubble¶
3. → Pamm·Pamm·Rubble¶
4. → Domm·Domm·Rubble¶

Steps:

1. Create the required numbered list and set format (e.g. number style, indents, spacing, as applicable). Only create one numbered line.

2. On the numbered line, insert the child name field.
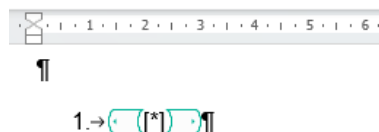
3. Highlight the entire line, including the paragraph return. By including the paragraph return you will ensure that each child is inserted onto a new line with a bullet point.
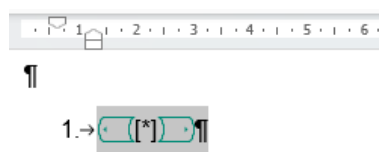
4. Use the Word Add-In to apply the **Child {{Repeat}}** conditional rule. The rule will be applied with a red content control.
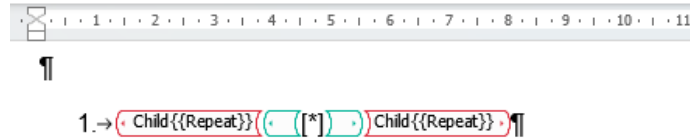
This conditional rule instructs Word on what to do with each child.

4.   Formatting Tools

The Word Add-In provides formatting tools for repeats. In the Word Add-In, go to the **More Menu** and select **Formatting Controls**.
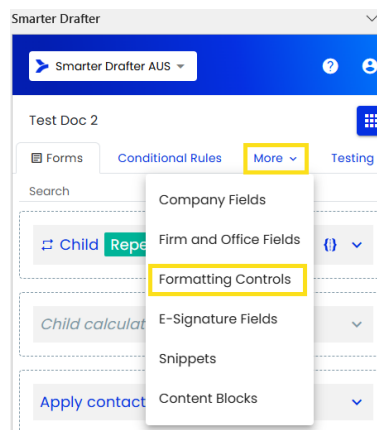
The following options are available:

Formatting for repeating data uses yellow content controls.

Description:

List formatting	Inline list formatting	Paragraph sorting
Formats a numbered or bulleted list to use a line separator (comma, semi colon etc) and a word separator before the last instance (full stop, semi colon etc)	Formats the repeating text in sentence style with a separator between each repeat (comma, semi colon etc) and a word separator before the last instance (full stop, semi colon etc)	Formats a numbered or bulleted list in ascending or descending order

Examples:

List formatting	Inline list formatting	Paragraph sorting (descending)
1. Bamm Bamm Rubble; 2. Tomm Tomm Rubble; 3. Pamm Pamm Rubble; or 4. Domm Domm Rubble.	All of the children, Bamm Bamm Rubble, born on 1 April 2016, Tomm Tomm Rubble, born on 12 September 2018, Pamm Pamm Rubble, born on 1 November 2020, Domm Domm Rubble or born on 29 August 2022 live with their maternal grandmother.	• Tomm Tomm Rubble • Pamm Pamm Rubble • Domm Domm Rubble • Bamm Bamm Rubble

4.1   List Formatting

To apply list formatting:

1. Create your numbered or bulleted list as per the instructions above.

2. Insert your preferred separator character after the field. In this example a semi-colon has been used.

3. Highlight the entire line, including the paragraph return.
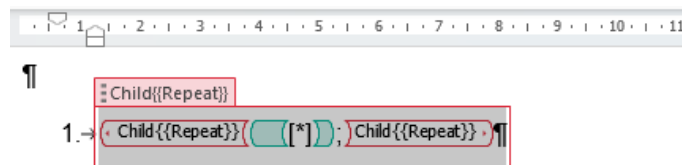
4. In the Word Add-In, go to the **More Menu** and select **Formatting Controls**.
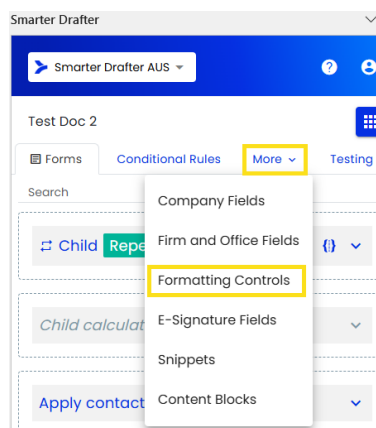
5. Click **ADD** next to the **List Formatting** option.
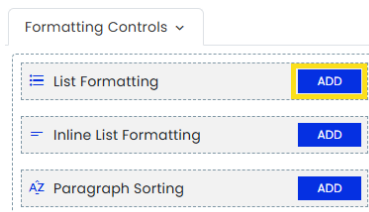
6. Select your **formatting** options
   >> **Suffix**: the separator word before the last repeat
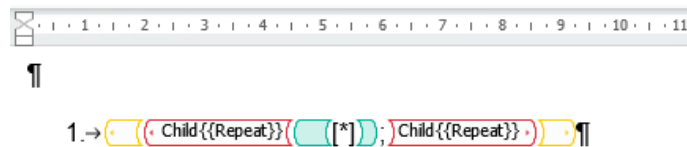   >> **Punctuation**: the character to put at the end of the list
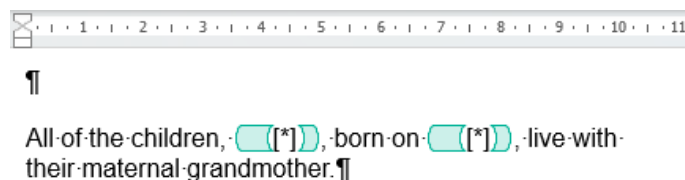   and click **Add**.

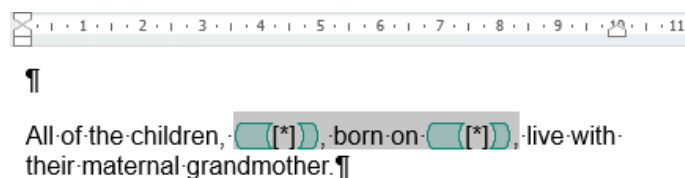7. The yellow formatting content control will be wrapped around the text.

4.2   Inline List Formatting

To apply inline formatting:

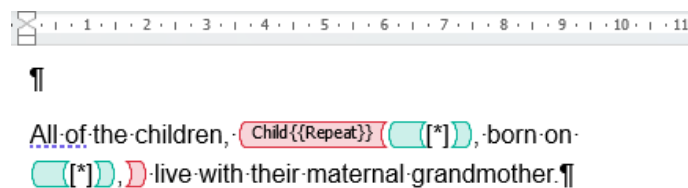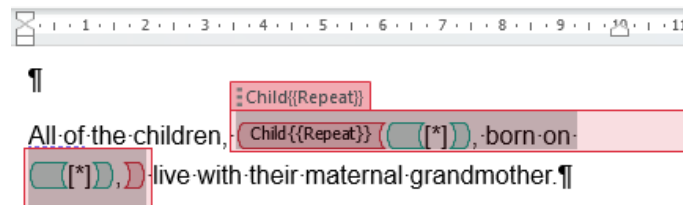1. Create your sentence as required and include the separator punctuation. In the example below a comma has been used.

2. Highlight the repeating data only.

3. Apply the Child {{Repeat}} conditional rule.

4. Highlight the red content control so that the whole rule and text is included.

5. In the Word Add-In, go to the **More Menu** and select **Formatting Controls**.
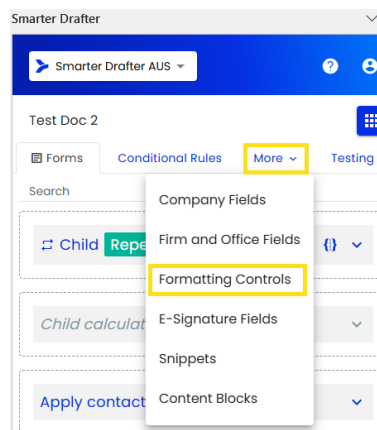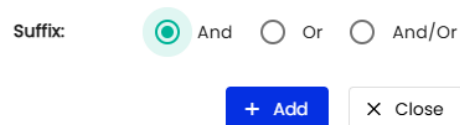

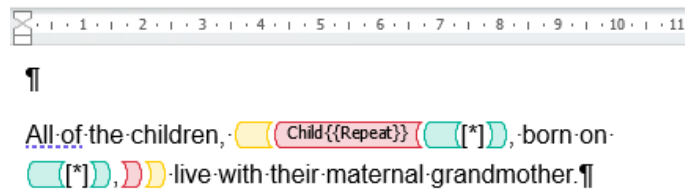6. Click **ADD** next to the **Inline List Formatting** option.
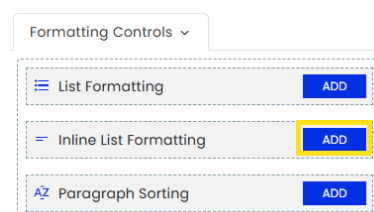
7. Select the **Suffix** (the separator word before the last repeat) and click **Add**.

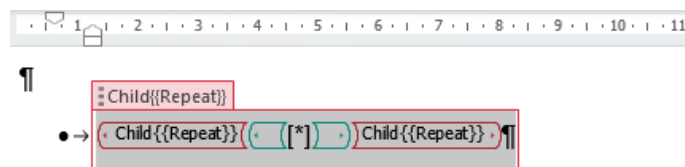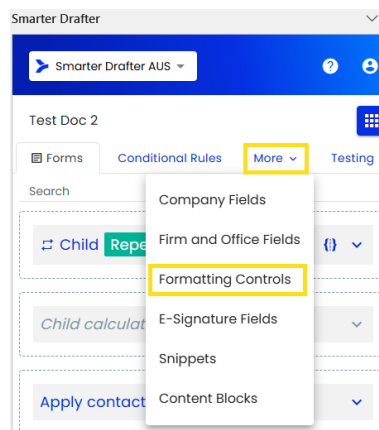8. The yellow formatting content control will be wrapped around the text.

4.1   Paragraph Sorting
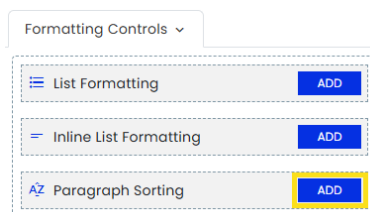
To apply paragraph sorting:

1. Create your numbered or bulleted list as per the instructions above.

2. Highlight the entire line, including the paragraph return.

3. In the Word Add-In, go to the **More Menu** and select **Formatting Controls**.
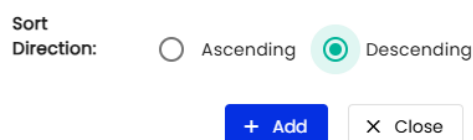

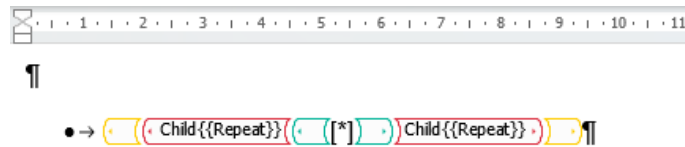4. Click **ADD** next to the **Paragraph Sorting** option.

5. Select the sorting direction and click **Add**.

Content Control Settings

Sort Direction: ○ Ascending   ● Descending

[+ Add]   [✕ Close]

6. The yellow formatting content control will be wrapped around the text.

5.   Set a Whole Template to Repeat per Instance

The instructions above have covered parts of Repeating Data within a document, but the repeat functionality also includes the ability to repeat the whole document, e.g. creating a separate letter of demand for each guarantor.

To do this:

1. Create the form for your letter, including a repeating section for the guarantors.

2. Create a conditional rule for Guarantor {{Repeat}}.

3. Create the Word template of the letter, inserting fields for the Guarantor as required and a page break at the very end.

4. When the letter is complete, highlight the entire content of the Word document (including the page break) and apply the Guarantor {{Repeat}} conditional rule.

At this point you have a letter and it's going to be addressed to the guarantor, and the conditional rule is telling Word to repeat the letter for each guarantor BUT we need to tell Word where to split each letter into its own Word document so that all of the letters don't generate within the same single Word document.
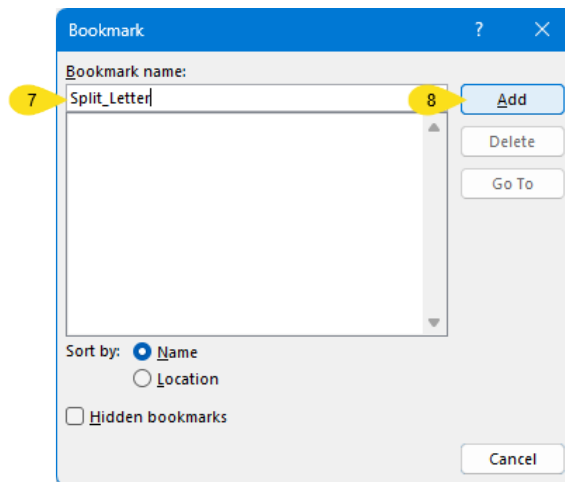
To set the separating point, we need to insert a splitting bookmark to show Word where to restart each letter.
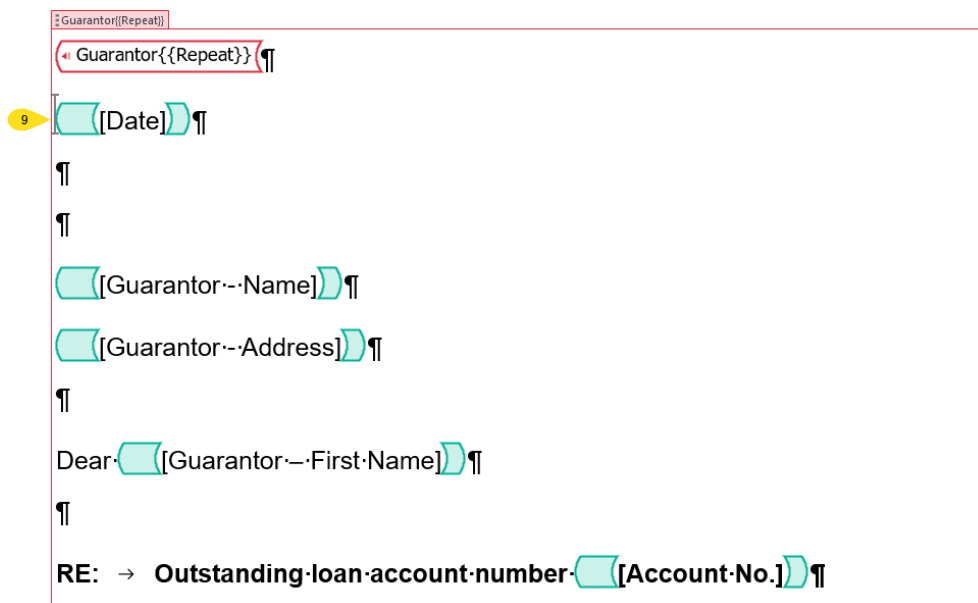
To do this:

5. Place your cursor **within** the red repeat content control.
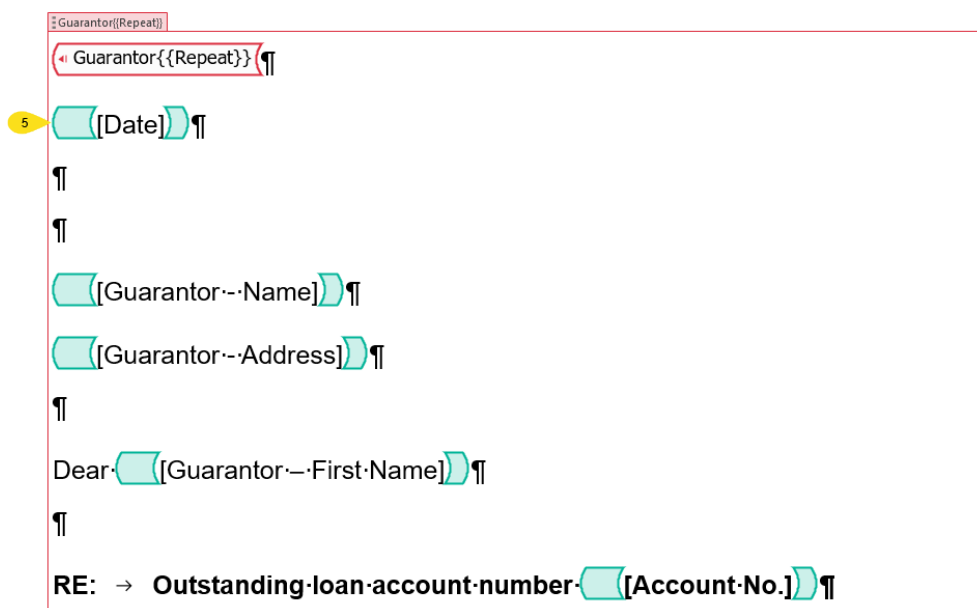
6. On the **Word ribbon**, click the **Insert tab** and then click **Bookmark**.

7. Give the bookmark a **name** that begins with **Split_** e.g. Split_Letter.

8. Click Add.

9. The bookmark character will be inserted at the splitting point.

Bookmarks aren't shown by default so if you can't see the bookmark character as above, you can turn this on in Word.

On the **Word Ribbon**, click the **File Tab**, click **Options**, click **Advanced**, scroll down to the **Show Document Content** and tick the **Show Bookmarks** checkbox.

Note: The correct placement of the bookmark is imperative to this feature functioning correctly.

10. When a repeatable document is generated, a document will be created for each repeat instance and when the submission is downloaded, there will be a list showing a document for each repeat plus a consolidated document that includes them all:

Download Generated Documents ✕

- Guarantor letter of demand
- Guarantor letter of demand – Letter 1
- Guarantor letter of demand – Letter 2
- Guarantor letter of demand – Letter 3
- Guarantor letter of demand – Letter 4

- Guarantor letter of demand
- Guarantor letter of demand – Letter 1
- Guarantor letter of demand – Letter 2
- Guarantor letter of demand – Letter 3
- Guarantor letter of demand – Letter 4

- Download All