

# **Applied Systems Client Network**

**SEMINAR HANDOUT**

***Document Setup in TAM –  
Changing from Office 2003  
to 2007,  
where ARE things now?***

**ASCnet<sup>TM</sup>**

## Prepared for ASCnet

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**Objective:** This class will review TAM's Document Setup looking at the differences between Office 2003 and 2007. We will take a look at:

- Applied Options, where are they now?
- Styles, Editing Tools, Document Mapping, 2003 & 2007 in a side by side view. Where they were then and where they are now.
- New features in 2007 that might be used to expedite editing of documents both in document setup and once they are merged by your users.

**Assumptions:** This seminar is based on the following  
TAM Version 10.x  
Microsoft ® Word Version 2007 and 2003

**Note:** This handout is designed to be printed in **duplex mode**, so that the Word 2003 pages will be on the left (or even pages), and the Word 2007 pages on the right (or odd numbered pages) for a side by side view.

## Table of Contents

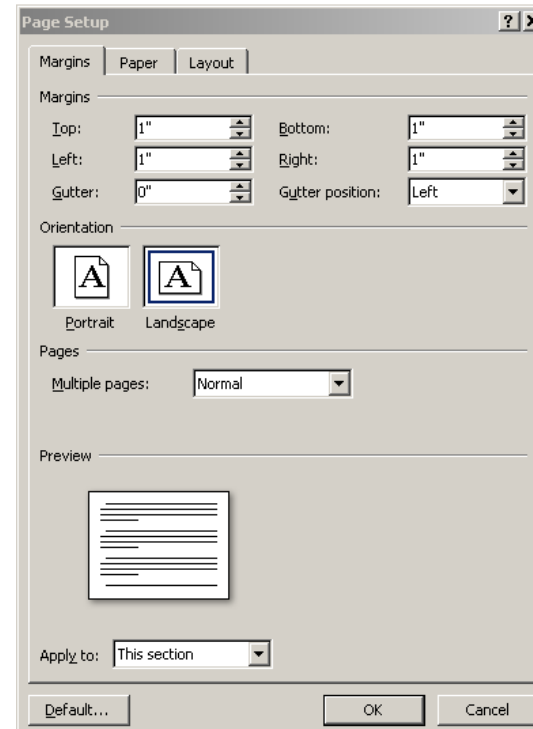
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## **Basic Document Editing and Setup**

## Page Setup Options – 2003

**Page Setup** is located under File, Page Setup.

Though the screen layout is slightly different with 2007, the information on the Page Setup window is the same. This screenshot is of the Office 2007 Page Setup window.



**Margins** are located on the Page Setup Window or by clicking and dragging on the ruler bar.

**Headers and Footers** are found from View, Header and Footer in Office 2003, or by double clicking in an existing header or footer (though you must use insert first).

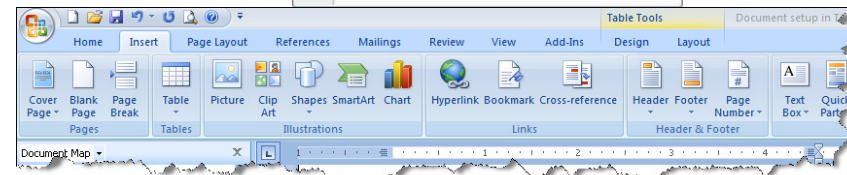
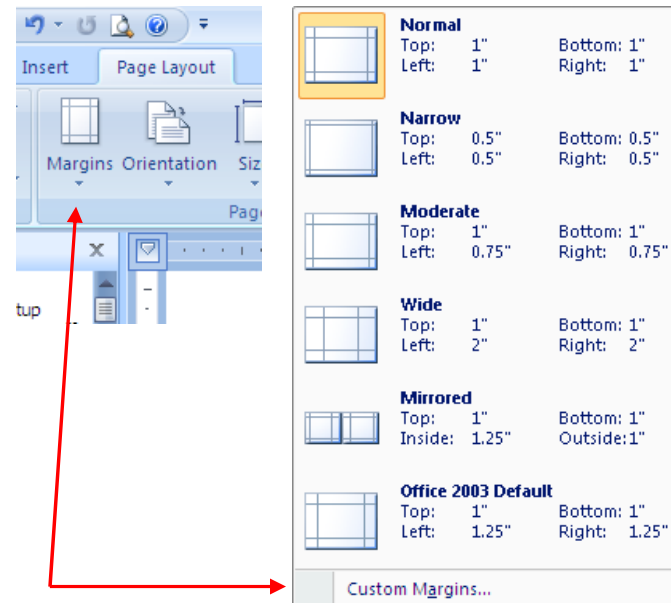
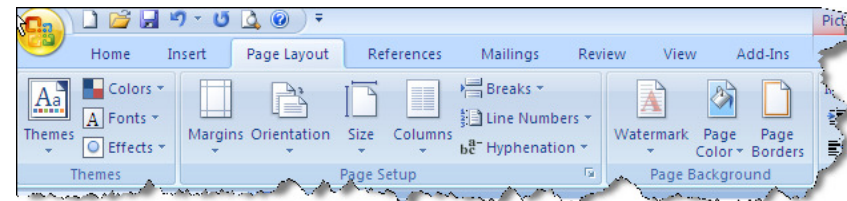
## Page Setup Options – 2007

Location for general **Page Setup** is under the **Page Layout** Command Tab.

The familiar Page Setup window can also be accessed by double clicking on the top side of the ruler bar within the document.

**Margins** are on the Page Layout Command Tab under the Margins Gallery, with the option for Custom Margins at the bottom of the tab, which will bring up the familiar Page Setup Window.

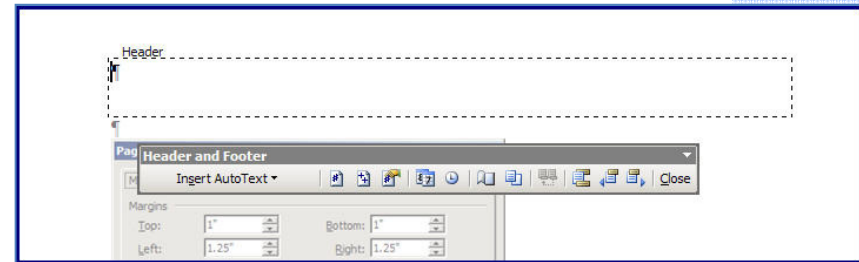
**Headers and Footers** are found on the Insert Command Tab under the Header and Footer section.



## Page Setup Options – 2003 – continued

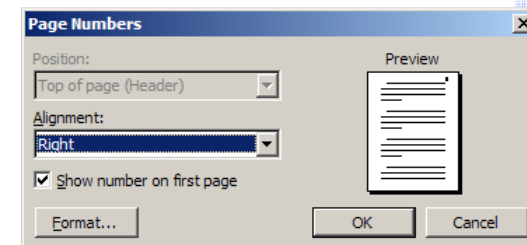
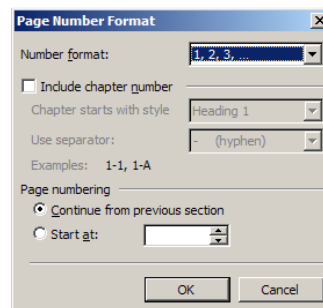
The Header and Footer Toolbar opens along with the Header on the document. Text can be typed and tools from the toolbar can be used to:

- Insert Page Number
- Insert Number of Pages
- Format the Page Number
- Insert Date
- Insert Time
- Access Page Setup
- Show/Hide Document Text
- Link to Previous (Section)
- Switch between Header and Footer
- Show Previous
- Show Next
- And Close the toolbar



Any time that the Header or Footer is selected; the Header and Footer toolbar will automatically appear.

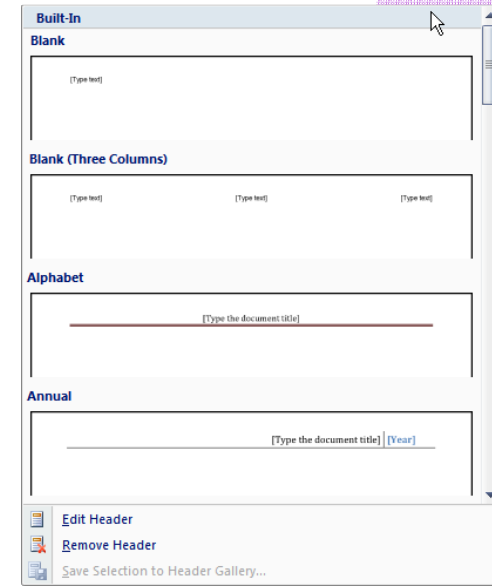
**Page Numbers** are included as part of the Header and Footer toolbar but can also be accessed through Insert, Page Numbers. If this option is used, Word 2003 will automatically place them in the header or footer area of the document. Both the placement and the formatting of the numbers can be controlled from the pop up windows.



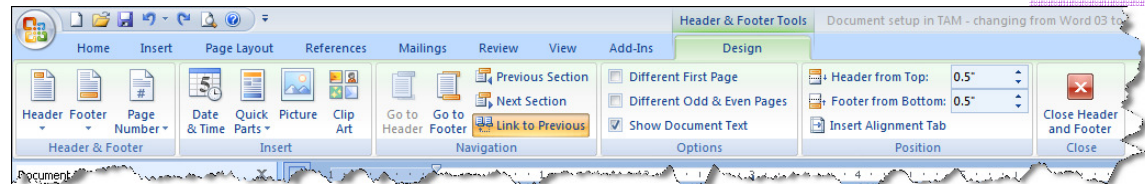


## Page Setup Options – 2007 – continued

When you select the drop down box under Header, or Footer the Gallery window opens. Select one of those shown, Remove Header, or Edit Header.

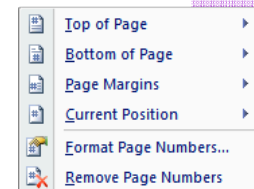


Edit Header opens a separate Contextual Command Tab - Header & Footer Tools with all of the design options.



An easy option to access the Contextual Command Tab – Header & Footer Tools is to simply double click within the Header or footer area of a document (even if one has not already been set up).

**Page Numbers** are located in the Header & Footer Command Set, and when the drop down is selected many built in options for placement of page numbers in the document appear.



## Page Setup Options – 2003 – continued

September, 2008

**Page Breaks** and **Section Breaks** are found from Insert, Break.

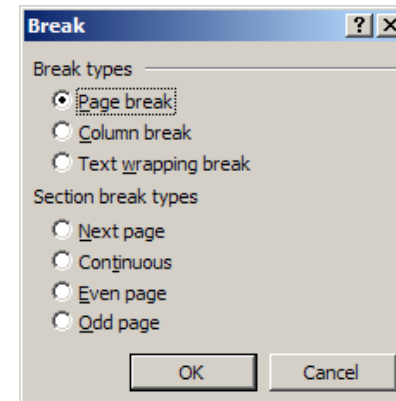
Break types at the top of the window are for:

- Page
- Column break
- Text wrapping Break

The bottom of the window includes the Section break types of:

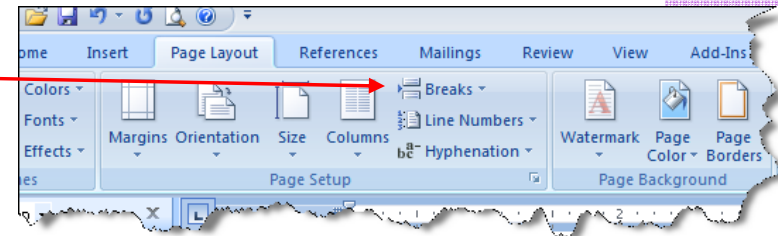
- Next page
- Continuous
- Even Page
- Odd Page

In both versions of Office, Page Breaks can be entered by using CTRL + Enter on the keyboard.

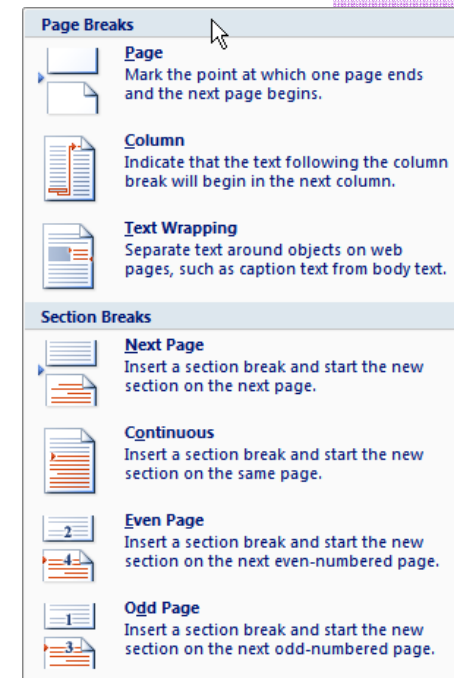


## Page Setup Options – 2007 – continued

**Page Breaks** and **Section Breaks** are located on the Page Layout Command Tab.



When the drop down arrow is selected, the Page Breaks and Section Breaks Gallery box drops down.



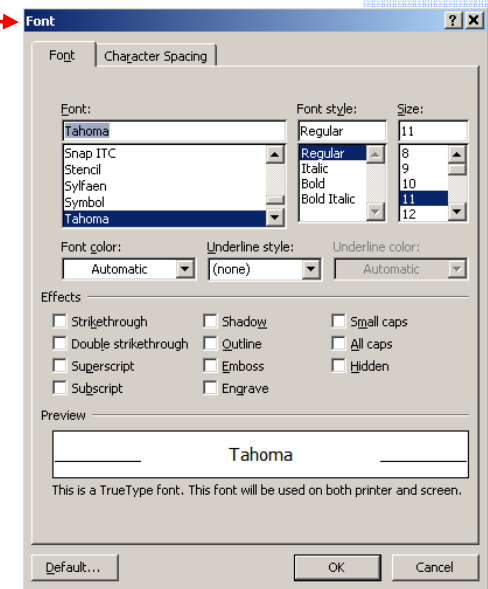
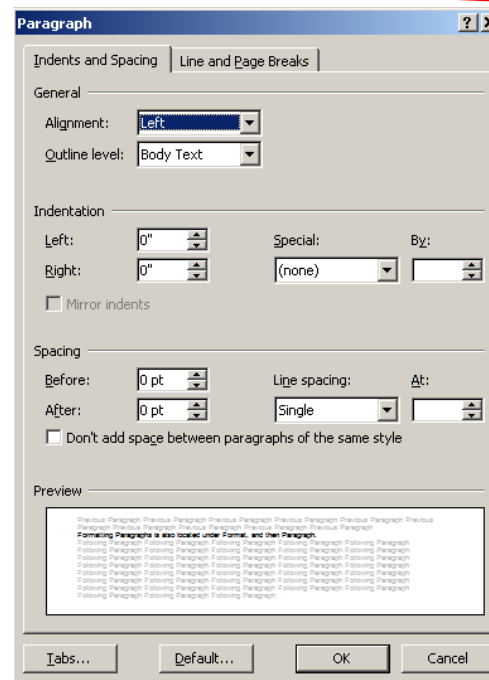
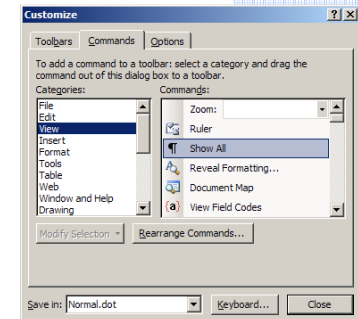
## Formatting Options – 2003

**Show / Hide** Formatting Symbols can be selected from the Standard Toolbar in Word 2003. If you view your Standard and Formatting Toolbars on one row, this command is usually not seen and can be added to the toolbar. Select the down arrow at the end of the Standard toolbar, Add or Remove Buttons, and Customize. Select the Commands tab, and in the Categories window select View, then from the Commands window select the ¶ symbol for Show All. Click and hold and drag the command to the toolbar into the location desired.

View the **Ruler** through View / Ruler, left click Ruler to check or uncheck the option.

**Font** formatting in 2003 is under Format / Font. The Font dialog box for 2003 is the same as 2007 and is shown here.

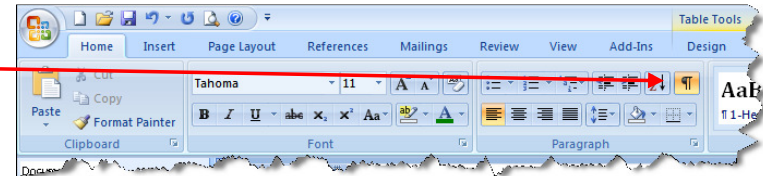
**Formatting Paragraphs** is also located under Format, and then Paragraph, opening the Paragraph Formatting window, which looks slightly different from 2007 but includes the same information (2007 Window is shown here).



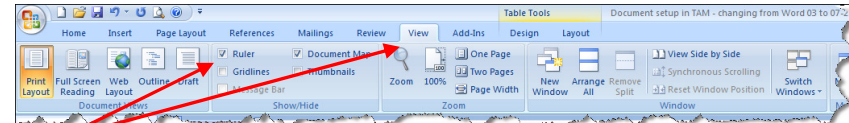
## Formatting Options – 2007

September, 2008

**Show / Hide** Formatting Symbols is located on the Home Command Tab in the Paragraph area.

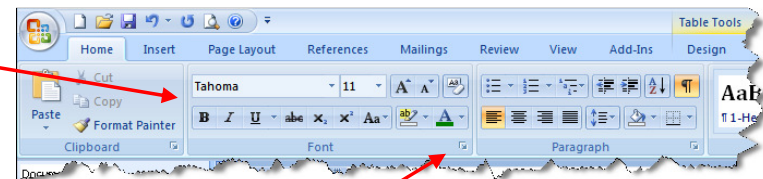


View the **Ruler** through the View Command Tab, and check the box for Ruler.

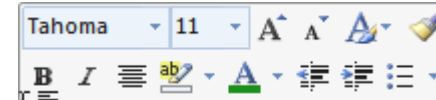


**Font** management is located on the Home Command Tab.

When the dialog launcher is selected, the old familiar font box appears.

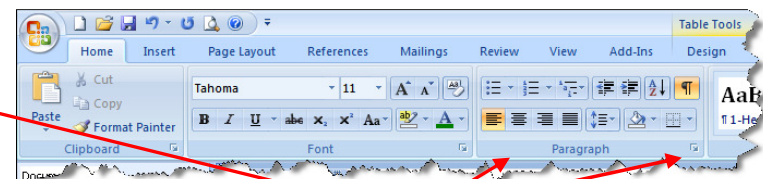


The Mini Toolbar for font formatting will appear and "hover" when text is first selected (or with a right click) so that text can be quickly changed for some functions without having to move the mouse too far.



**Formatting Paragraphs** is also on the Home Command Tab with many of the often used shortcuts shown for easy access.

Selecting the dialog launcher reveals the familiar Paragraph setup window where Alignment, Outline level, Indentation and Spacing can be controlled as well as Tabs, and Line and Page Breaks on the separate tab.

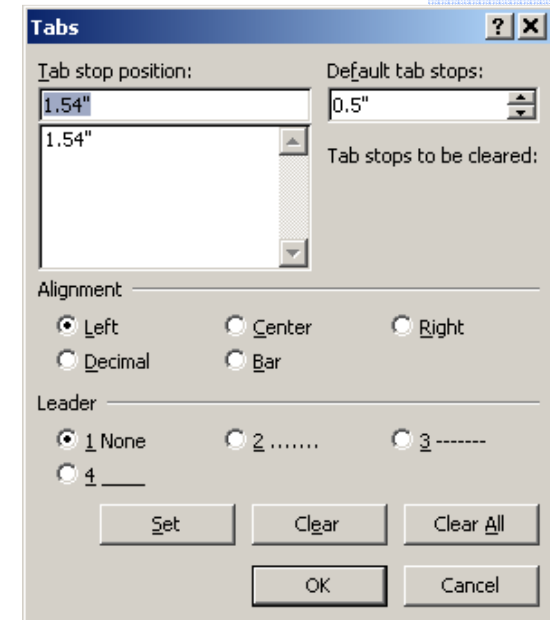


## Formatting Options - 2003 - continued

**Tabs** are set by a number of ways in Word 2003:

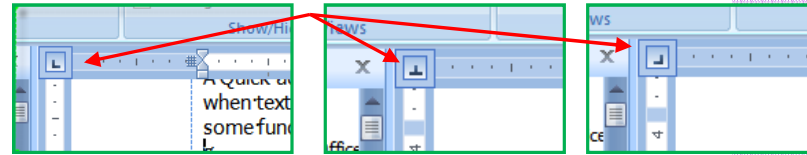
- through Format / Tabs
- by clicking on the symbol in the corner of the document until the desired tab stop is selected and clicking on the ruler (same as in 2007)
- or by double clicking on the lower half of the top ruler to bring up the Tabs box.

The Tabs dialog box in 2003 is the same as that in 2007 and is shown here.



## Formatting Options - 2007 - continued

**Tabs** can be formatted through the familiar Paragraph formatting window, or they can be formatted from the screen. Clicking on the corner of the rulers repeatedly will change the shape of the icon there for the various tab stops.



Once you have selected the tab shape you desire, merely click on the ruler in the location you wish to place the tab.

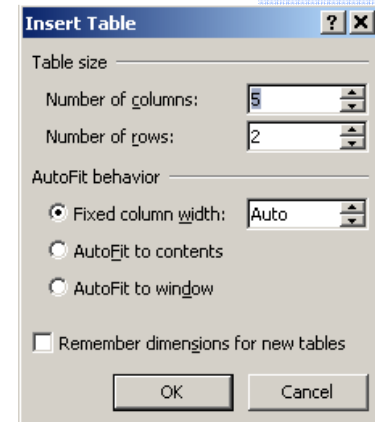


Or, a double click on the lower half of the ruler will bring up the familiar Tab set menu.

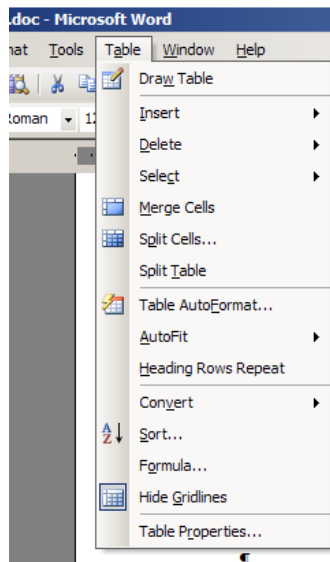
## Tables – 2003

**Tables** in 2003 are accessed through Table from the Standard toolbar, then Insert, and Table. Tables can also be inserted using the Insert Table Icon from the Formatting toolbar.

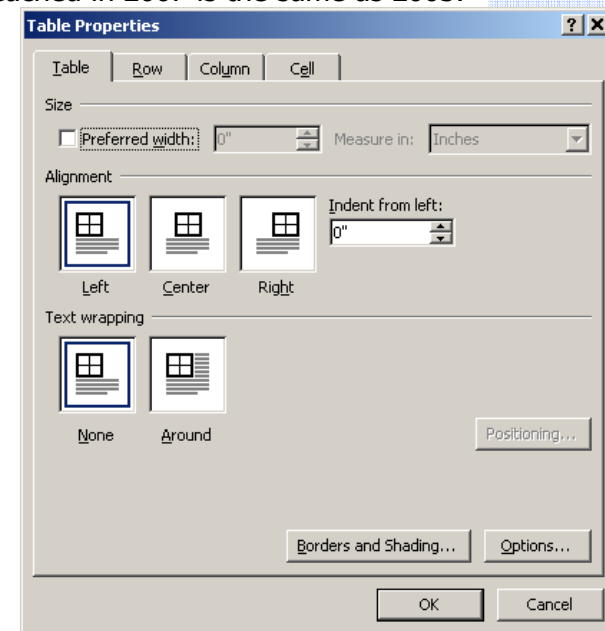
The Insert Table box opens, and is the same in 2003 and 2007.



**Table Tools** are accessed from the Table menu on the Standard Toolbar, or by a right click when inside a table.



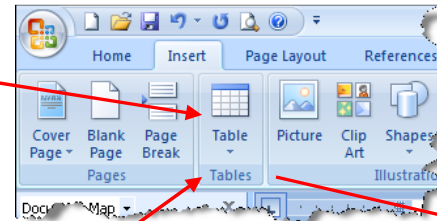
**Table Properties** in 2003 are found on the Table menu as well as by a right click when inside a table. The Table properties dialog box once reached in 2007 is the same as 2003.





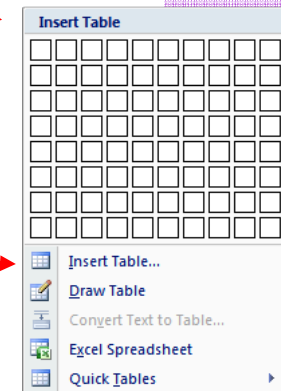
## Tables – 2007

**Tables** are accessed through the Insert Command Tab.

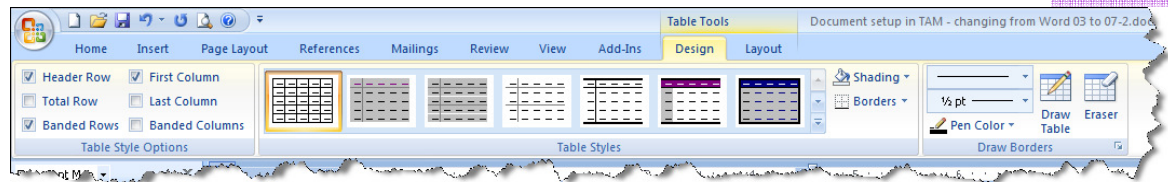


When the drop down arrow is selected the Insert Table Menu appears. This works similarly to what we are used to.

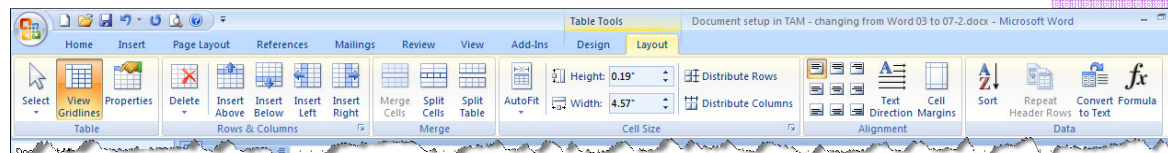
Note that the Insert Table option is available where the table properties can be set (including the Fixed Column Width so that when data is inserted the table cell doesn't resize with the size of the data).



Once you are in a Table, the Contextual Command Tab - **Table Tools** displays with both the **Design SubTab** (for Table Styles, Shading, Borders, etc.),



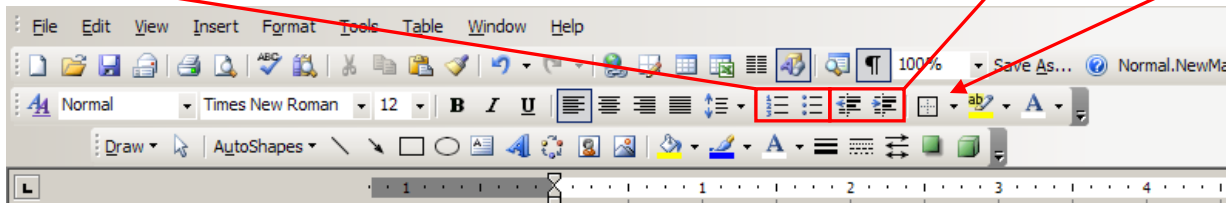
and the **Layout SubTab** for Properties, inserting rows and columns, splitting and merging cells, splitting the table, cell sizes and alignment, and data manipulation tools.



Note that the Rows and Columns and Cell Size Command Sets contain dialog launchers, which reveal the familiar dialog boxes.

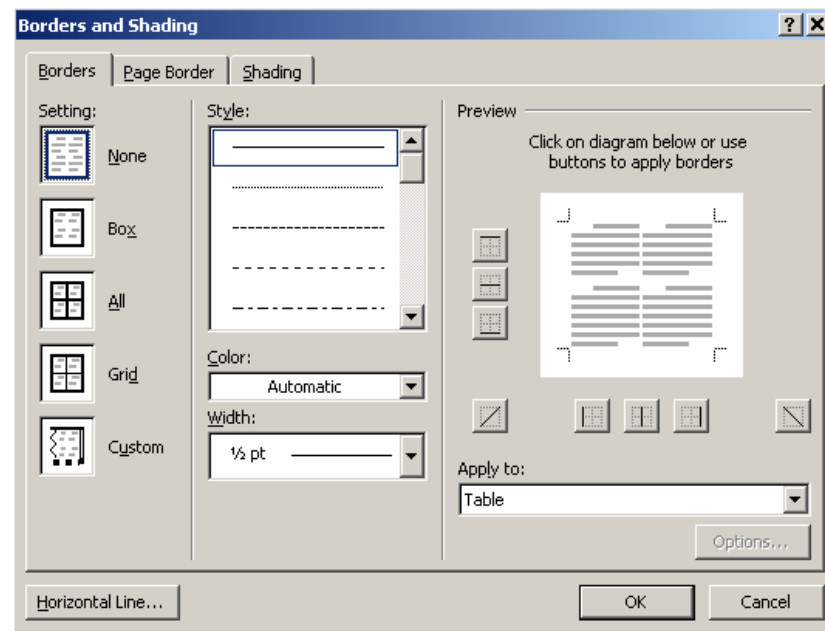
## Bullets and Lists, Indentation Table Shading – 2003

**Bullets and Lists** are available in 2003 on the Formatting toolbar, along with **Indentation** and **Table Borders** (which are also available on the Table Borders and Shading toolbar mentioned below).



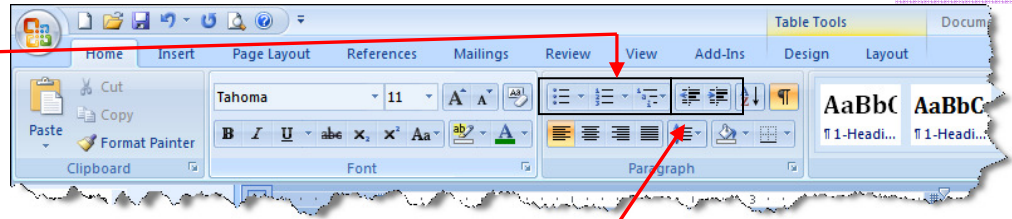
**Table Shading** is controlled through Format, Borders and Shading, or by right clicking inside the table and selecting Borders and Shading. There is also the option to turn on the Table Borders and Shading toolbar through View Toolbars.

The familiar Borders and Shading box for 2007 is nearly the same as for 2003 and is shown here.

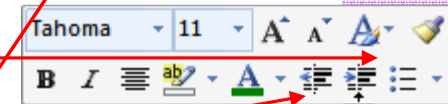


## Bullets and Lists, Indentation Table Shading – 2007

**Bullets and Lists** are accessed from the Paragraph section of the Home Command Tab,

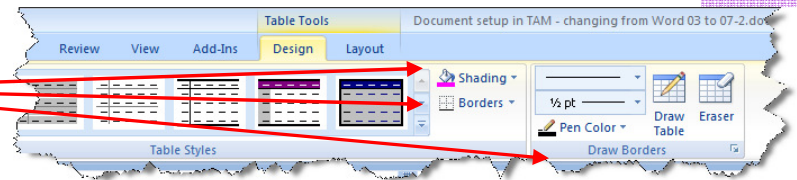


and also from the Mini Toolbar that hovers when text is first highlighted (note that the bullets icon has a drop down box for options).



**Indentation** is controlled from the same Paragraph area and is also on the Mini Toolbar.

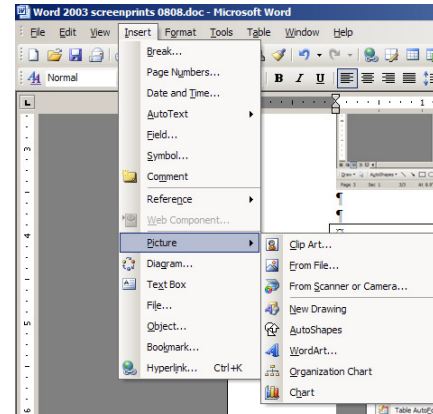
**Table Shading** is controlled from the Contextual Command Tab -Table Tools, Design SubTab. **Table Borders** are also located in the same area.



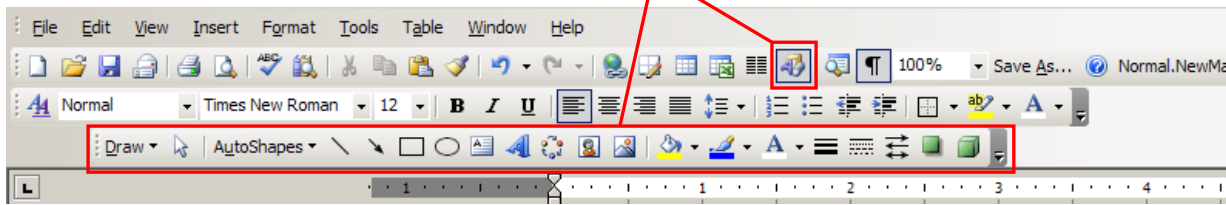
## Pictures and Drawing Tools - 2003

**Pictures** in 2003 are accessed through Insert / Picture and the drop down box allows selection for:

- Clip Art
- From File
- From Scanner or Camera
- New Drawing
- AutoShapes
- WordArt
- Organization Chart and
- Chart



**Drawing** tools can be easily access by selecting the Drawing icon from the Standard toolbar, which will turn on the Drawing toolbar. The toolbar can also be turned on using View / Toolbars / Drawing.



The toolbar can be easily turned on and off using the icon at the top of the screen, and the toolbar can be located at the bottom on the screen if desired.

## Spelling & Grammar Checking - 2003

Spell Check can be run using the **Spelling and Grammar** icon on the Standard Toolbar. The icon in 2007 is very similar and is shown here.

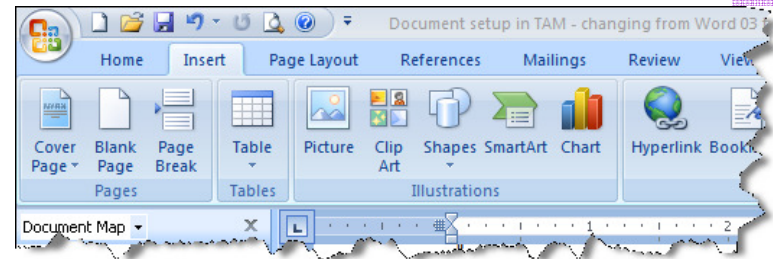


The underline indicators in 2003 for spelling and grammar errors are the same in 2007.

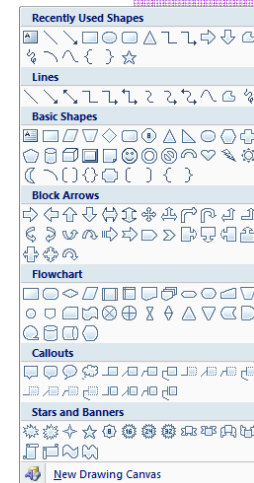
## Pictures and Drawing Tools - 2007

**Pictures** in 2007 are accessed through Insert, and options available are on the Illustrations Command Set.

Selecting Picture from the Command Set will automatically open My Pictures. Selecting Clip Art opens the Clip Art search window, the same as 2003.



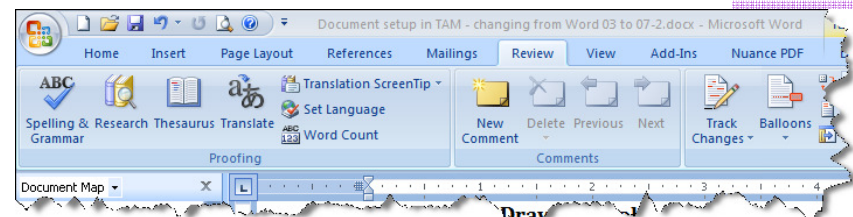
**Drawing** in 2007 is accessed through the Insert Command Tab, and from the Illustrations Command Set select the Shapes Gallery. Select the shape from the list and click and drag to draw the shape desired.



## Spelling & Grammar Checking - 2007

**Spelling and Grammar** checking is located on the Review Command Tab, Spelling and Grammar.

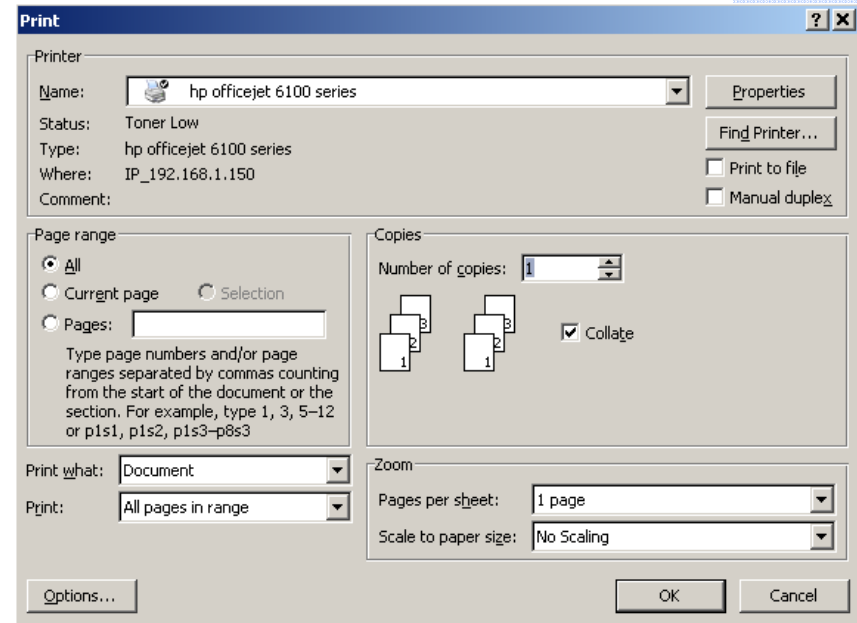
The underline indicators in 2003 for spelling and grammar errors are the same in 2007.



## Printing – 2003

**Printing** in 2003 is accessed from the Printer icon on the Standard toolbar (for printing to the default printer), or through File Print for selecting a different printer, printer properties, or number of copies.

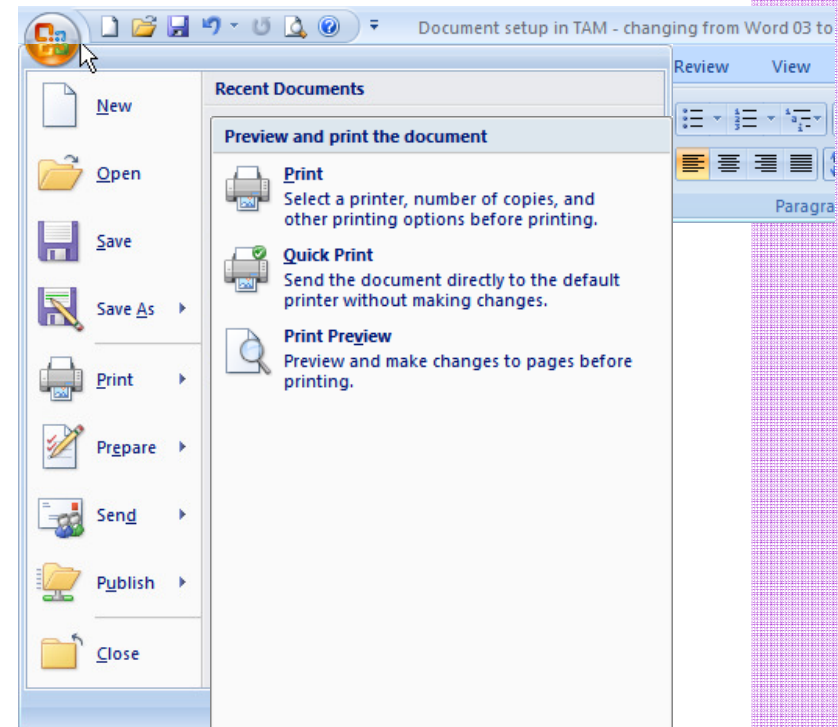
The Print window in 2003 has the same information as in 2007.



## Printing - 2007

Printing in 2003 is accessed through the Microsoft Office Button, Print, Quick Print, or Print Preview. The Print choice will open the traditional Print window, to change printers, set properties, or number of copies.

An icon for Quick print can be added to the Quick Access Toolbar if desired.



## TAM Document Setup



## TAM Data Fields – 2003

### Inserting TAM Data Fields—Word 2003 Version

**Introduction** One of the great things about using Word within TAM is that fields in the customer, contact, billing screen, or applications can be pulled into your document automatically, eliminating the need for manual entry. Documents should be constructed to take advantage of this feature as much as possible to make your staff more efficient.

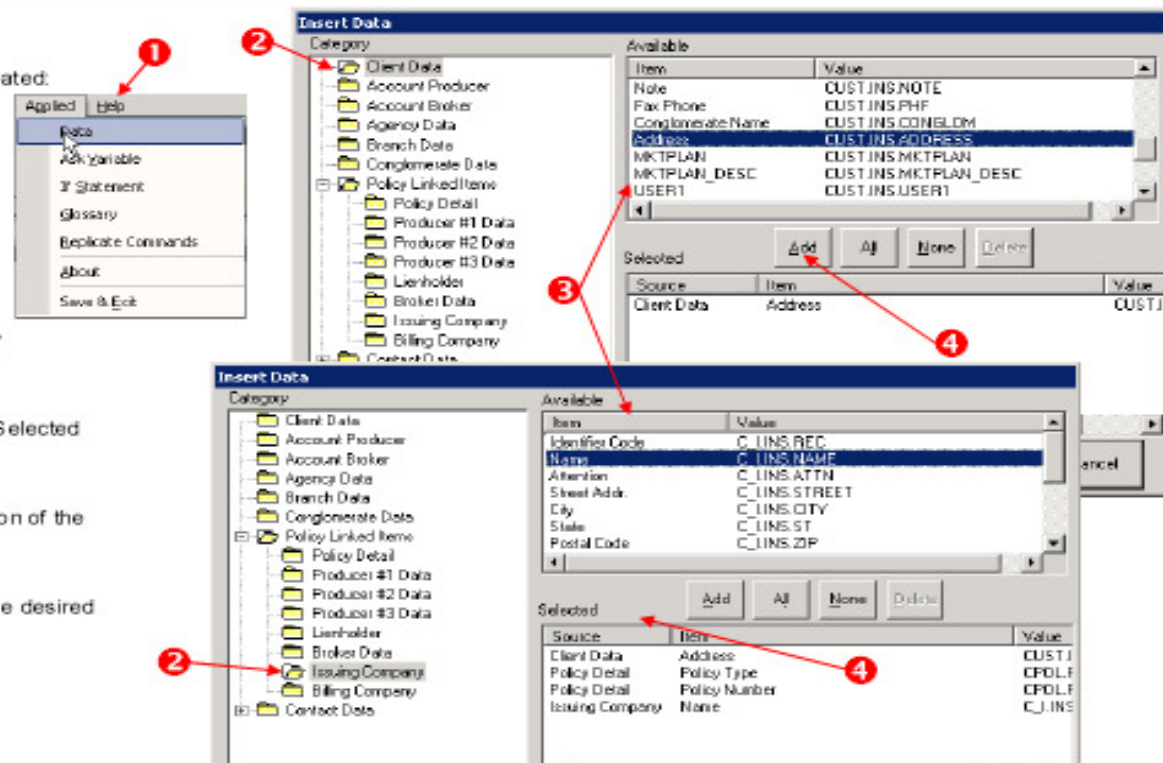
### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Once your document has been named and created:

- 1 Access the area of your document where you wish information to be pulled, and select Applied from the Menu Bar, and Data.
- 2 Select the type of data to pull from the Category window.
- 3 Fields available from the selected category will appear in the Available window.
- 4 Scroll and select any fields desired to the Selected window.
- 5 OK will drop all selected fields to the location of the cursor on the document.
- 6 Move any fields not in the proper spot to the desired location.



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## TAM Data Fields – 2007

### Inserting TAM Data Fields—Word 2007 Version

**Introduction** One of the great things about using Word within TAM is that fields in the customer, contact, billing screen, or applications can be pulled into your document automatically, eliminating the need for manual entry. Documents should be constructed to take advantage of this feature to make your staff more efficient. With version 9.1, TAM is compatible with Office 2007, as shown in the screenshots.

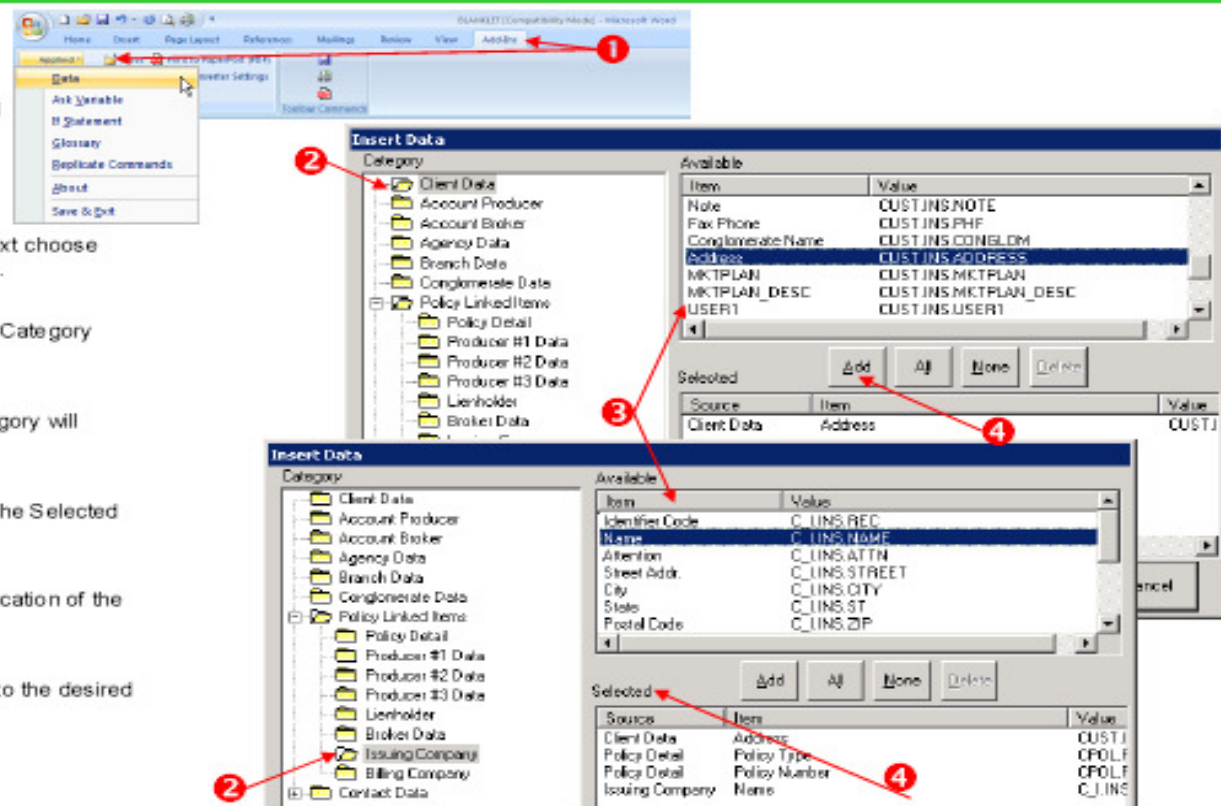
### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Once your document has been named and created:

- 1 Access the area of your document where you wish information to be pulled, and select the Add-Ins Command Tab. Next choose Data from the Applied menu on the Ribbon.
- 2 Select the type of data to pull from the Category window.
- 3 Fields available from the selected category will appear in the Available window.
- 4 Scroll and select any fields desired to the Selected window.
- 5 OK will drop all selected fields to the location of the cursor on the document.
- 6 Move any fields not in the proper spot to the desired location.



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## Data fields continued – 2003

### Data Categories:

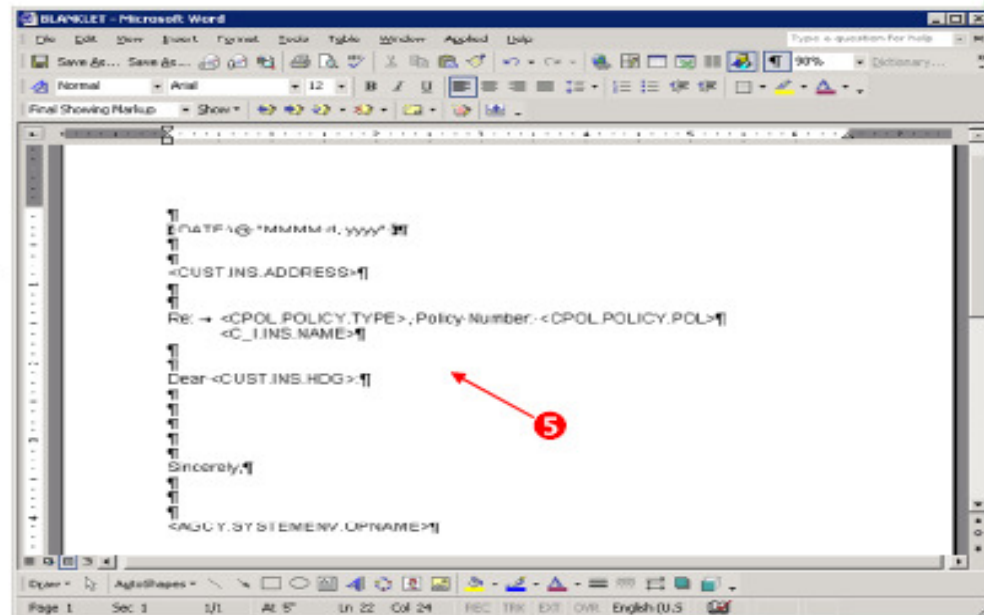
- Client Data = fields on the Client Detail screen
- Account Producer = fields on the Producer record for the Producer on the Client Detail screen.
- Account Broker = fields on the Broker record for the Broker on the Client Detail screen
- Agency Data = fields within the Agency's setup, or operator logged into TAM.
- Branch Data = fields within the Agency's setup in the Branch area
- Conglomerate Data = fields for the conglomerate clients

### Policy Linked Items:

- Policy Detail = fields on the Billing Screen
- Producer 1, 2, & 3 Data = fields on the Producer record for the Producer on the Billing Screen
- Leinholder Data = fields on the Leinholder record for the Leinholder entered on the Billing Screen
- Broker Data = fields on the Broker record for the Broker on the Billing Screen
- Issuing Company Data = fields on the Company record for the company listed in the ICO field on the Billing Screen
- Billing Company Data = fields on the Company record for the company listed in the BCO field on the Billing Screen
- Application Data = fields on the application that was specified as the policy type to which this document applies in Document Setup

### Contact Data:

- Contact Info = fields on the Contact record(s) attached to this client.
- Driver Info = fields on the Driver Info tab of the Contact record(s) attached to this client.
- Info Classes = codes used on the Info Classes tab of the Contact record(s) attached to this client.



### NOTE

Note: Though fields within a particular document can be copied and pasted, they cannot be copied from one document and pasted to another or they will "break" and data will not pull through to the pasted fields.

### BRIGHT IDEA

Include any fields that are stored in TAM as data fields in your documents. This will eliminate the need for users to manually enter data on to documents, improving efficiency and decreasing errors. This also encourages that entries made to your database are kept up to date and accurate at all times.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Inserting an ASK Variable  
Inserting an IF Statement

## Data fields continued - 2007

### Data Categories:

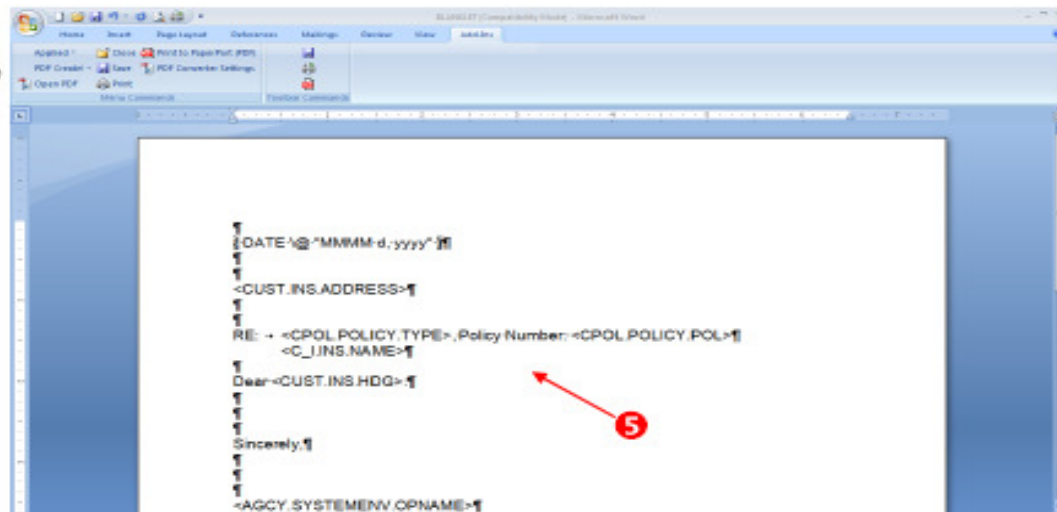
- Client Data = fields on the Client Detail screen
- Account Producer = fields on the Producer record for the Producer on the Client Detail screen.
- Account Broker = fields on the Broker record for the Broker on the Client Detail screen
- Agency Data = fields within the Agency's setup, or operator logged into TAM.
- Branch Data = fields within the Agency's setup in the Branch area
- Conglomerate Data = fields for the conglomerate clients

### Policy Linked Items:

- Policy Detail = fields on the Billing Screen
- Producer 1, 2, & 3 Data = fields on the Producer record for the Producer on the Billing Screen
- Leinholder Data = fields on the Leinholder record for the Leinholder entered on the Billing Screen
- Broker Data = fields on the Broker record for the Broker on the Billing Screen
- Issuing Company Data = fields on the Company record for the company listed in the ICO field on the Billing Screen
- Billing Company Data = fields on the Company record for the company listed in the BCO field on the Billing Screen
- Application Data = fields on the application that was specified as the policy type to which this document applies in Document Setup

### Contact Data:

- Contact Info = fields on the Contact record(s) attached to this client
- Driver Info = fields on the Driver Info tab of the Contact record(s) attached to this client
- Info Classes = codes used on the Info Classes tab of the Contact record(s) attached to this client



### NOTE

Note: Though fields within a particular document can be copied and pasted, they cannot be copied from one document and pasted to another or they will "break" and data will not pull through to the pasted fields.

### ≡BRIGHT IDEA≡

Include any fields that are stored in TAM as data fields in your documents. This will eliminate the need for users to manually enter data on to documents, improving efficiency and decreasing errors. This also encourages that entries made to your database are kept up to date and accurate at all times.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Inserting an ASK Variable  
Inserting an IF Statement



## ASK Variables – 2003

### Inserting an ASK Variable—Word 2003 Version

**Introduction:** Ask variables allow for the customization of a document to include specific information that cannot be drawn from a field in TAM.

### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Once the document has been named and created, or selected from the existing list of documents:

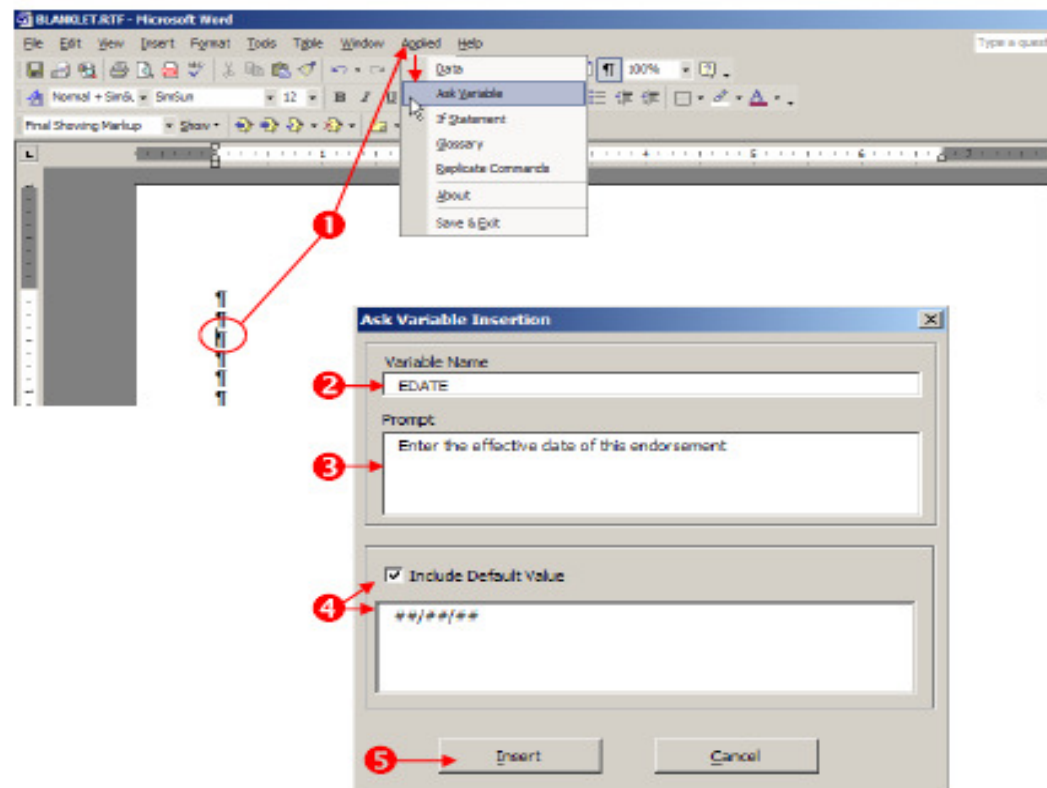
**1** Access the area of the document where the Ask Variable should be placed, and select Applied from the Menu Bar, Ask Variable.

**2** In the Ask Variable Insertion dialog box: Create a Variable Name. Use care in creating this name so as not to choose a field name that might already be in use by TAM (e.g. for effective date you might use edate instead of eff).

**3** In the Prompt box, enter text or the question to present to the end user so that they will know what data to type in at their end (e.g. Enter the effective date of this endorsement).

**4** If a Default Value is desired, check the Default box and enter the default in the box (e.g. ##/##/## - to indicate to the user what date format is desired, or what answer is expected).

**5** Select Insert.



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## ASK Variables – 2007

### Inserting an ASK Variable—Word 2007 Version

**Introduction** Ask variables allow for the customization of a document to include specific information that cannot be drawn from a field in TAM. With version 9.1, TAM is compatible with Office 2007, as shown in the screenshots.

### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Once the document has been named and created, or selected from the existing list of documents:

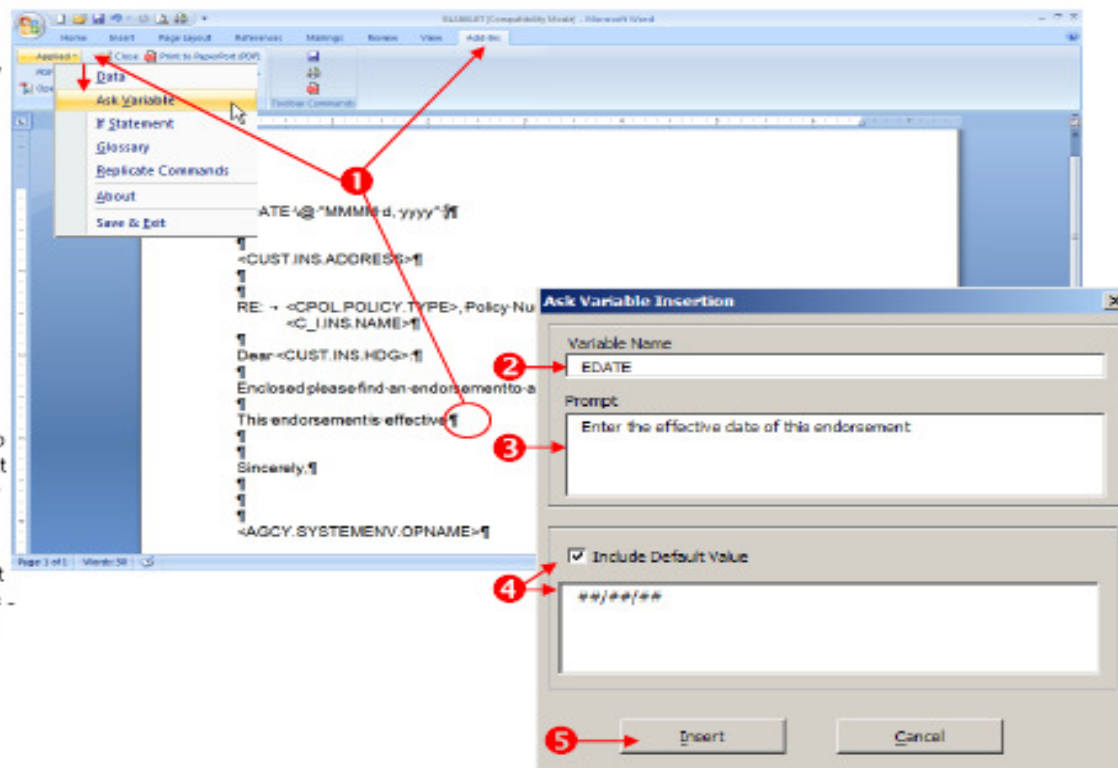
**1** Access the area of the document where the Ask Variable should be placed, and select the Add-Ins Command Tab. Next choose Ask Variable from the Applied menu on the Ribbon.

**2** In the Ask Variable Insertion dialog box: Create a Variable Name. Use care in creating this name so as not to choose a field name that might already be in use by TAM (e.g. for effective date you might use edate instead of eff).

**3** In the Prompt box, enter text or the question to present to the end user so that they will know what data to type in at their end (e.g. Enter the effective date of this endorsement).

**4** If a Default Value is desired, check the Default box and enter the default in the box (e.g. ##/##/## - to indicate to the user what date format is desired, or what answer is expected).

**5** Select Insert.



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## ASK continued – 2003

**6** OK to the preview of what the Ask Variable will appear like to the end user.

**7** Format of the Ask Variable is:

Remember that when you insert an ASK field, it's with a default value included counterpart

`{ASK:EDATE:"Enter the effective date of this endorsement" \d "#####" \X REF:EDATE}`

or without a default value set

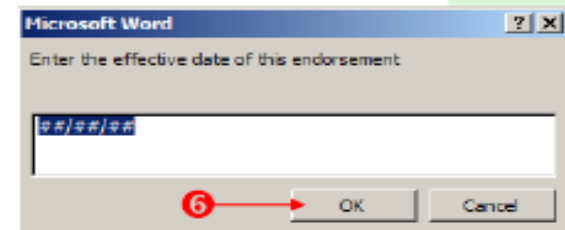
`{ASK:ENDTDOES:"Complete the sentence.... This endorsement" \X REF:ENDTDOES}`

field also gets inserted - the REF field. The ASK asks the question and gets the response, the REF inserts the response. Normally when you first insert an ASK using the Applied dialogue, it puts the REF in automatically right up next to the ASK like this:

`{ Ask X "Prompt" \d "Default Value" \X(Ref X)}`

However, the REF does not have to go right up next to the ASK. It can be moved, duplicated, or even placed inside an IF or FORMULA field.

Continued next page.



### TIP

If all of the Ask Variable is not visible once inserted into the document, use ALT + F9 to reveal the field coding.

### WARNING

Try not to use more than four Ask Variables within one document as it becomes too time consuming and confusing for the user. Also, the use of Ask Variables from within Proposals is not recommended because of the complexity of the many documents merging data from different sources.

## ASK continued – 2007

**6** OK to the preview of what the Ask Variable will appear like to the end user.

**7** Format of the Ask Variable is:

Remember that when you insert an ASK field, it's counterpart field also gets inserted - the REF field.

{ASK EDATE "Enter the effective date of this endorsement" d "#####" } {REF EDATE }

with a default value included

or without a default value set

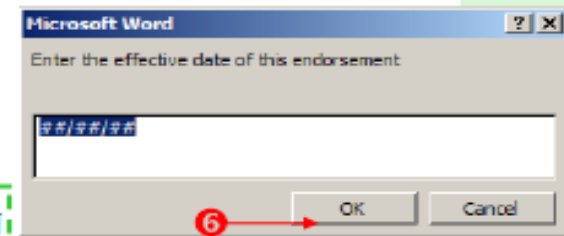
{ASK ENDDOES "Complete the sentence.... This endorsement" } {REF ENDDOES }

The ASK asks the question and gets the response, the REF inserts the response. Normally when you first insert an ASK using the Applied dialogue, it puts the REF in automatically right up next to the ASK like this:

{ Ask X "Prompt" d "Default Value" } {Ref X}

However, the REF does not have to go right up next to the ASK. It can be moved, duplicated, or even placed inside an IF or FORMULA field.

Continued next page.



### TIP

If all of the Ask Variable is not visible once inserted into the document, use ALT + F9 to reveal the field coding.

### WARNING

Try not to use more than four Ask Variables within one document as it becomes too time consuming and confusing for the user. Also, the use of Ask Variables from within Proposals is not recommended because of the complexity of the many documents merging data from different sources.

## ASK continued – 2003

### Advanced uses of ASK:

Once the format of the ASK variable is understood, they can be created by using CTRL + F9 which will create a field within Word, that appears as two special curly brackets.



Then the user can enter the formatting manually, using ASK then assigning a Variable Name, with the question enclosed in quotation marks. If a default is included, after the first set of quotation marks around the question or statement there follows a \d and then immediately the default value is included within a second set of quotation marks.

### Examples of ASK Variables:

Enter the number of pages included with this fax, with a default for a blank that can be completed manually once all pages are assembled. Result:

{ASK-NUMBERPGS "Enter the Number of Pages (including the cover) for this fax" \d "\_\_\_"} {REF-NUMBERPGS}

What is the fax number? (with no default). Result:

{ASK-FNUMBER "Enter the fax number"} {REF-FNUMBER}

Enter the effective date of the cancellation, with a default of ##/##/## so that the user knows the format that is expected. Result:

{ASK-CANDATE "Enter the cancellation date." \d "##/##/##"} {REF-CANDATE}

### TIP

Return if True and return if False can have anything inserted in them, words, phrases, Tam Fields, pictures, even many pages of text. Build your IF statement as a "generic", and insert the text or wording after it is inserted into your document.

### TIP

When working in document setup, you may wish to have your paragraph markers turned on to view spaces, tabs, and other coding.

### >BRIGHT IDEA<

Use Ask Variables in combination with IF Statements to take one letter and make it serve many possibilities. A combination of ASK with IF can provide the same letter with and without a letterhead logo, or one endorsement cover letter that can work for additional premium, return premium, and no premium change scenarios.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Inserting TAM data fields  
Inserting an IF Statement



## ASK continued – 2007

### Advanced uses of ASK:

Once the format of the ASK variable is understood, they can be created by using CTRL + F9 which will create a field within Word, that appears as two special curly brackets.

{ } { }

Then the user can enter the formatting manually, using ASK then assigning a Variable Name, with the question enclosed in quotation marks. If a default is included, after the first set of quotation marks around the question or statement there follows a \d and then immediately the default value is included within a second set of quotation marks.

### Examples of ASK Variables:

Enter the number of pages included with this fax, with a default for a blank that can be completed manually once all pages are assembled. Result:

{ASK-NUMBERPGS "Enter the Number of Pages (including the cover) for this fax" \d " " } REF-NUMBERPGS }

What is the fax number? (with no default) Result:

{ASK-FNUMBER "Enter the fax number" } REF-FNUMBER }

Enter the effective date of the cancellation, with a default of ####/#### so that the user knows the format that is expected. Result:

{ASK-CANDATE "Enter the cancellation date." \d "####/####" } REF-CANDATE }

### TIP

When working in document setup, you may wish to have your paragraph markers turned on to view spaces, tabs, and other coding.

### ➤BRIGHT IDEA<

Use Ask Variables in combination with IF Statements to take one letter and make it serve many possibilities. A combination of ASK with IF can provide the same letter with and without a letterhead logo, or one endorsement cover letter that can work for additional premium, return premium, and no premium change scenarios.

### TIP

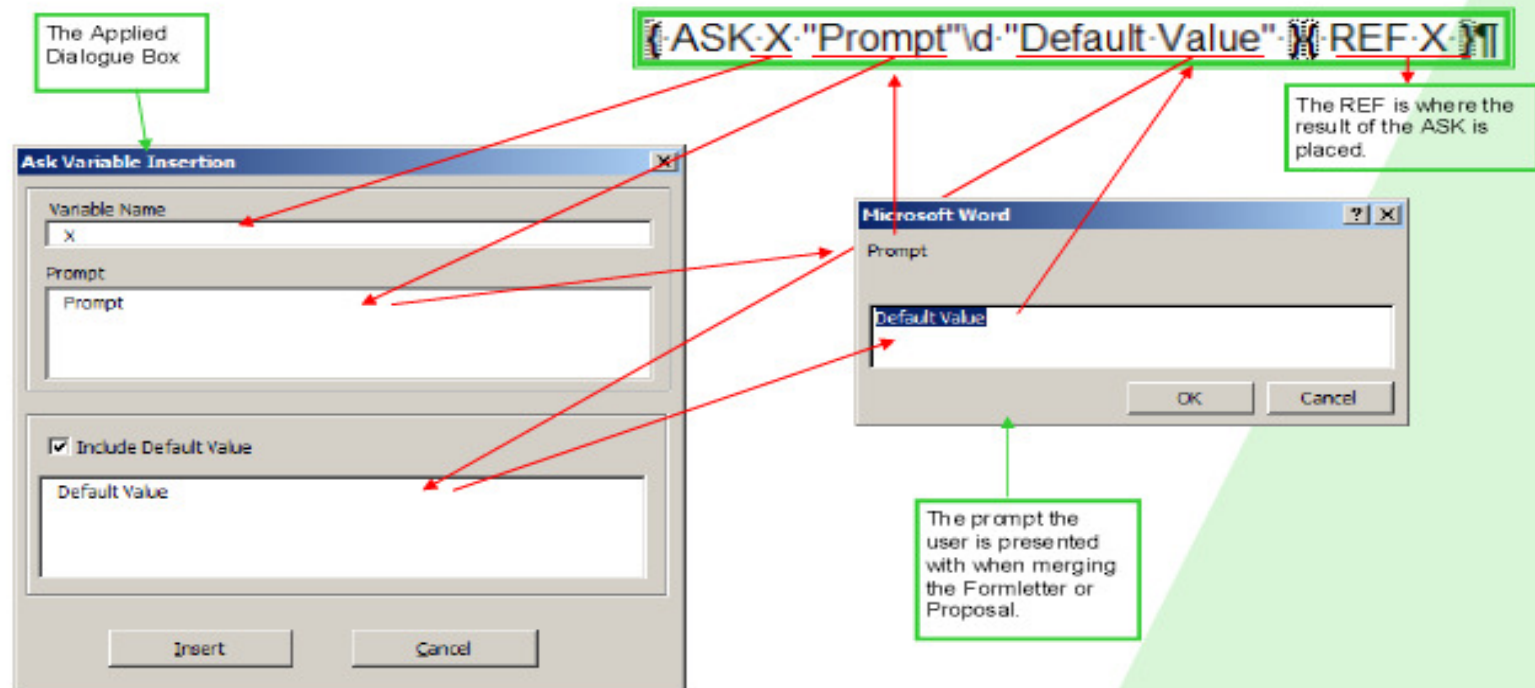
If using Ask Variables in combination with IF Statements, build your ASK, then build the IF Statement using "placeholders". Then cut the REF from where it has defaulted and insert it within the Expression field in the IF statement. Several IF Statements could use the same REF field yielding different results based on the end user's input.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Inserting TAM data fields  
Inserting an IF Statement

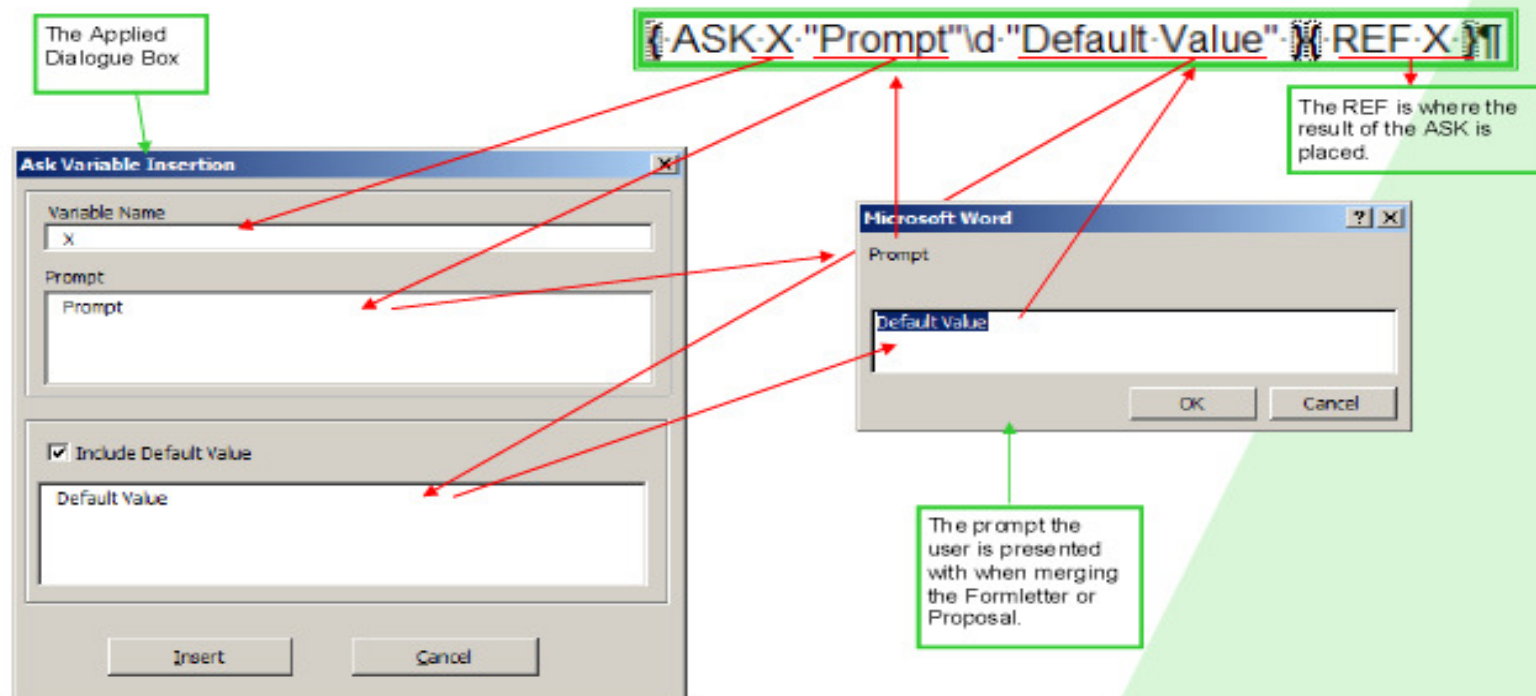
## ASK continued - 2003

## ANATOMY OF AN ASK VARIABLE



## ASK continued - 2007

## ANATOMY OF AN ASK VARIABLE



## IF Statements – 2003

### Inserting an IF Statement—Word 2003 Version

#### Introduction

IF Statements are a very powerful tool to customize your documents and proposals. An understanding of the anatomy of an IF, and how to directly edit it is extremely important for anyone involved in Document Management. For purposes of demonstrating this, we will create an If Statement that would insert wording in a document based upon the billing type on the policy screen for direct or agency bill.

#### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

#### Step by Step

Once the document has been named and created, or selected from the existing list of documents, access the area of the document where the IF Statement should be placed, and:

1 Select Applied from the Menu Bar, If Statement.

In the Conditional Statement Builder box:

2 Select Use Field to pick the Expression to be used (e.g. Policy Bill Type).

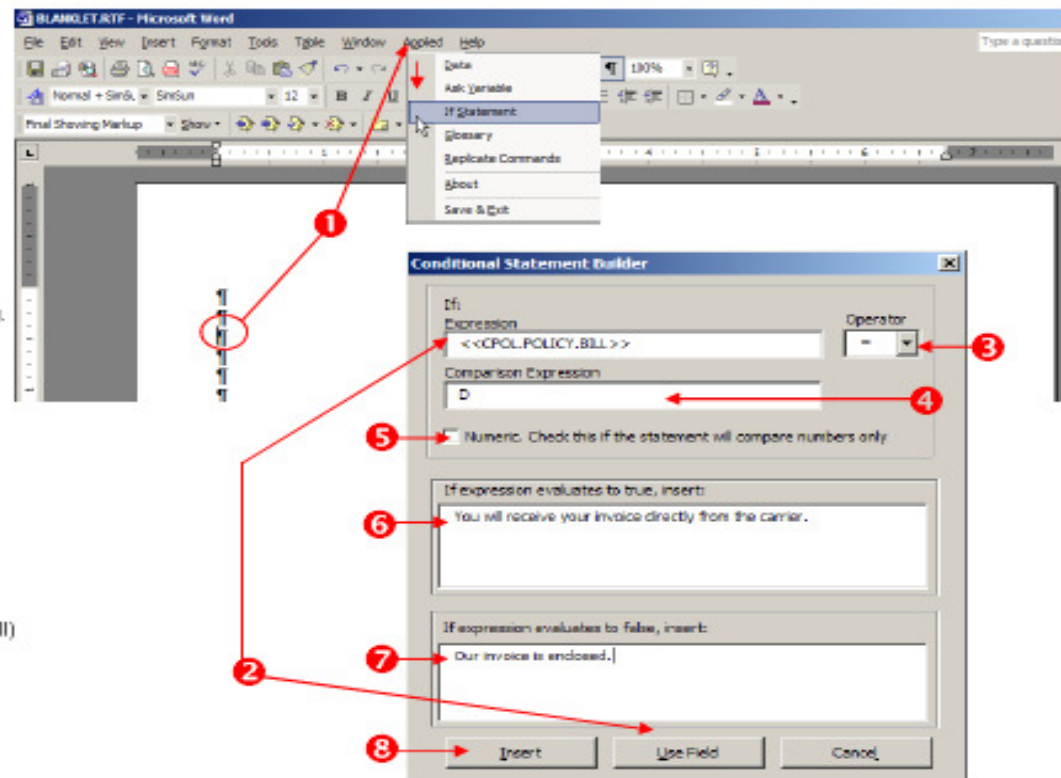
3 Select the Operator to apply (e.g. =)

Choices are:

- < less than
- <= equal to or less than
- <> is not equal to
- = equal to
- > greater than
- >= equal to or greater than

4 Select the Comparison Expression (e.g. D for Direct Bill)

5 Numeric, check the box if comparing numbers only.



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## IF Statements – 2007

### Inserting an IF Statement—Word 2007 Version

**Introduction** If Statements are a very powerful tool to customize your documents and proposals. An understanding of the anatomy of an IF, and how to directly edit it is extremely important for anyone involved in Document Management. For purposes of demonstrating this, we will create an If Statement that would insert wording in a document based upon the billing type on the policy screen for direct or agency bill. This task is written using Word 2007 which is compatible with TAM 9.1 and higher.

### Navigation:

Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Once the document has been named and created, or selected from the existing list of documents, access the area of the document where the IF Statement should be placed, and:

**1** Select the Add-Ins Command Tab, the down arrow by Applied from the Ribbon, If Statement.

In the Conditional Statement Builder box:

**2** Select Use Field to pick the Expression to be used (e.g. Policy Bill Type).

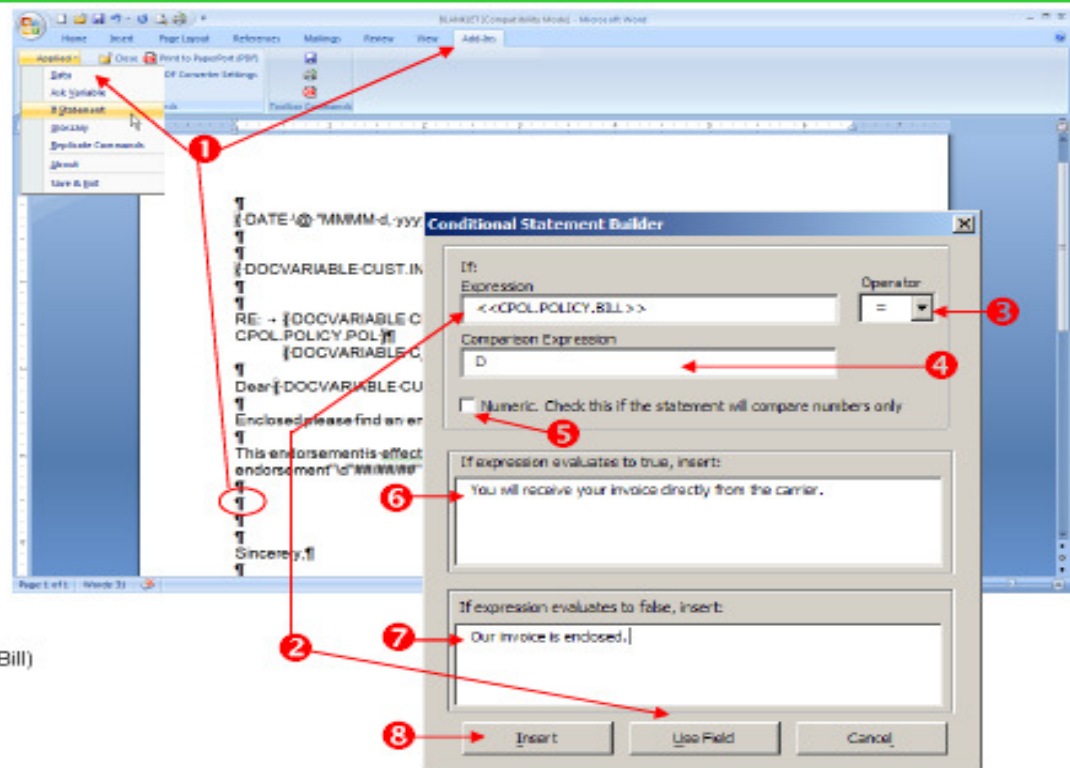
**3** Select the Operator to apply (e.g. =)

Choices are:

- < less than
- <= equal to or less than
- <> is not equal to
- = equal to
- > greater than
- >= equal to or greater than

**4** Select the Comparison Expression (e.g. D for Direct Bill)

**5** Numeric, check the box if comparing numbers only.



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## IF continued – 2003

**6** In the "If Expression is True" box insert the field or text desired (e.g. direct bill wording)

**7** In the "If Expression is False" box insert the field or text desired, or leave blank (e.g. agency bill wording).

**8** Insert to finish the If Statement.

Result of the sample used is:

```
{ IF <CPOL.POLICY.BILL> = "D" "You will receive your invoice directly from the carrier." "Our invoice is enclosed" }
```

Format of the If Statement is:

```
{ IF "expression" operator "comparison" "true result" "false result" }
```

or with no false result:

```
{ IF "expression" operator "comparison" "true result" }
```

Continued next page.

### TIP

IF statements might have a true and a false, or perhaps only a true (where the false result is left empty or eliminated). If there are many "true" results, create several IF statements and place them right together. As an example, you would use this for a situation where PR1 is one value, then his extension and email address are inserted, and a different extension and email address are inserted for a different producer code, etc.

### TIP

If all of the IF Statement is not visible once inserted into the document, use ALT + F9 to reveal the field coding.

## IF continued – 2007

**6** In the "If Expression is True" box insert the field or text desired (e.g. direct bill wording)

**7** In the "If Expression is False" box insert the field or text desired, or leave blank (e.g. agency bill wording).

**8** Insert to finish the If Statement.

Result of the sample used is:

```
{ IF <CPOL.POLICY.BILL> = "D" "You will receive your invoice directly from the carrier." "Our invoice is enclosed" }
```

Format of the If Statement is:

```
{ IF "expression" operator "comparison" "true result" "false result" }
```

or with no false result:

```
{ IF "expression" operator "comparison" "true result" }
```

Continued next page.

### TIP

IF statements might have a true and a false, or perhaps only a true (where the false result is left empty or eliminated). If there are many "true" results, create several IF statements and place them right together. As an example, you would use this for a situation where PR1 is one value, then his extension and email address are inserted, and a different extension and email address are inserted for a different producer code, etc.

### TIP

If all of the IF Statement is not visible once inserted into the document, use ALT + F9 to reveal the field coding.

## IF continued – 2003

### Advanced Uses of If Statements:

Once the format of the If Statement is understood, they can be created by using CTRL + F9 which will create a field within Word, that appears as

{ IF }

Then the user can enter the formatting manually, using IF then inserting the Expression within the first set of quotation marks, the operator, the comparison expression within the second set of quotation marks, the return if true within the third set of quotation marks, and the return if false within the fourth set of quotations marks (or if there is no false return the fourth set of quotation marks can be eliminated).

### Examples of IF Statements:

If the Attention Line is not equal to a blank, then insert the attention field followed by a hard carriage return. Result would appear:

{ IF "" { DOCVARIABLE CUST.INS.ATTN } "<>" "" { DOCVARIABLE CUST.INS.ATTN } }

In sending a letter requesting renewal information to a client, have the If statement automatically ask for the address if the field in tam is blank. Result:

{ IF "" { DOCVARIABLE CUST.CLIENT.EMAIL } "" "" "We notice that we do not have a current email address for our files. We would appreciate it if you could provide it to us when you return the attached form so that we have another means of contacting you in the future." }

If multiple agencies are installed, create multiple if statements back to back to insert the agency's logo onto a document or proposal cover page. This format would need to be duplicated for each agency:

{ IF "" { DOCVARIABLE AGCY.INS.REC } "" "" "1"  }

### TIP

For working in proposals, you may wish to create a generic IF, that says, IF the field is not blank, then insert the field. Copy and paste this generic statement as many times as needed in your document, then replace with the fields separately. The generic statement would be:  
{ IF "X" <> "" "X" "" }  
Then replace the X's with the fields you are using as needed.

### ≡BRIGHT IDEA≡

Use ASK Variables in combination with IF Statements to take one letter and make it serve many possibilities. A combination of ASK with IF can provide the same letter with and without a letterhead logo, or one endorsement cover letter that can work for additional premium, return premium, and no premium change scenarios.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Customizing Proposals with Word Switches  
Inserting an ASK Variable



### Advanced Uses of If Statements:

### Examples of IF Statements:

IF "DOCVARIABLE.CUST.INS.ATTN" = " " THEN "DOCVARIABLE.CUST.INS.ATTN"

IF "DOCVARIABLE-CUST.CLIENT.EMAIL"==" " "We notice that we do not have a current email address for our files. We would appreciate it if you could provide it to us when you return the attached form so that we have another means of contacting you in the future."



~~IF~~ "DOCVARIABLE AGCY.INS.REC" = "1"  ~~IF~~

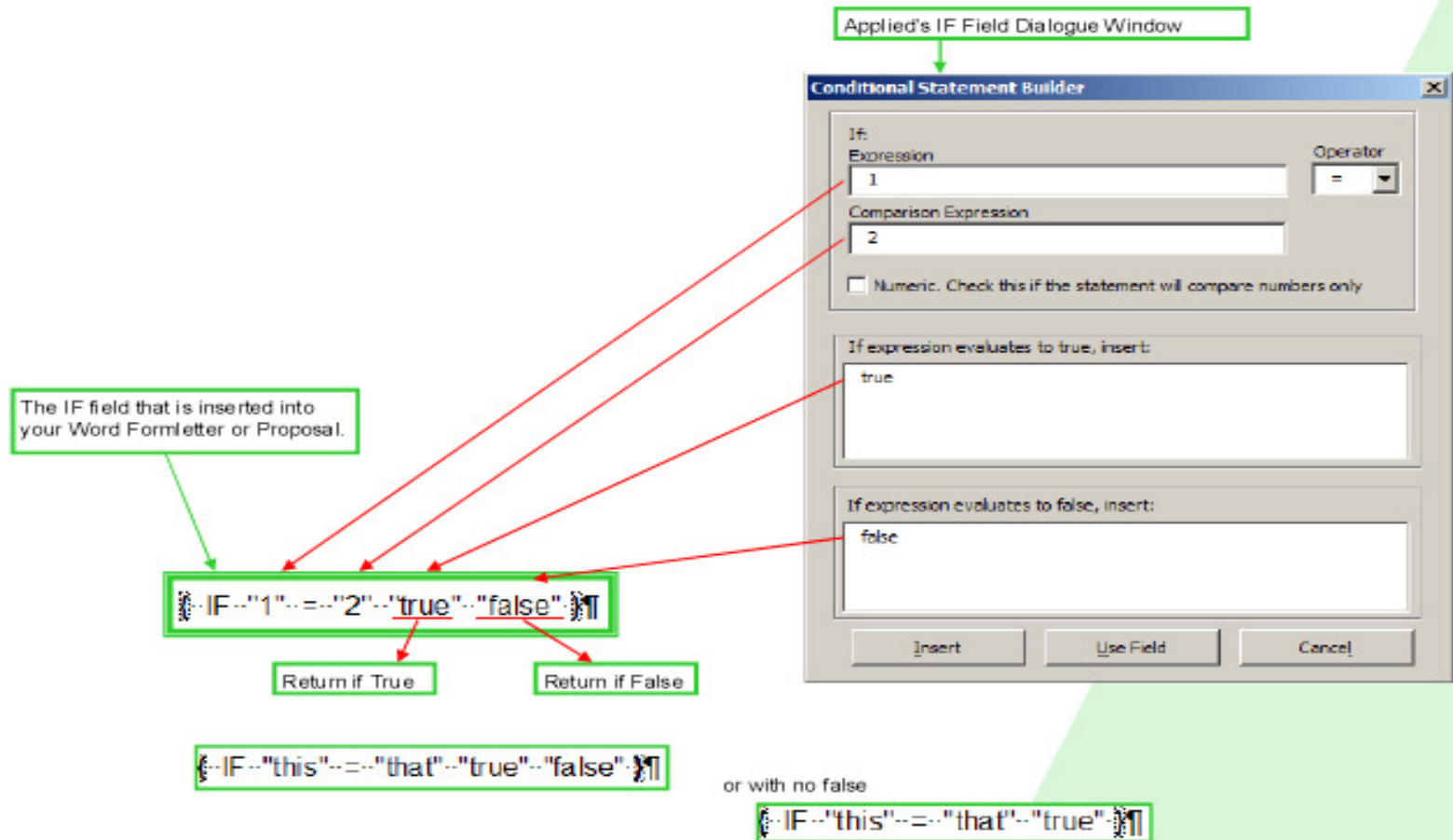
## ⇒ BRIGHT IDEA ⇒

SEE ALSO...

- Creating Formletters
- Creating Proposal Templates
- Customizing Proposals with Word Switches
- Inserting an ASK Variable

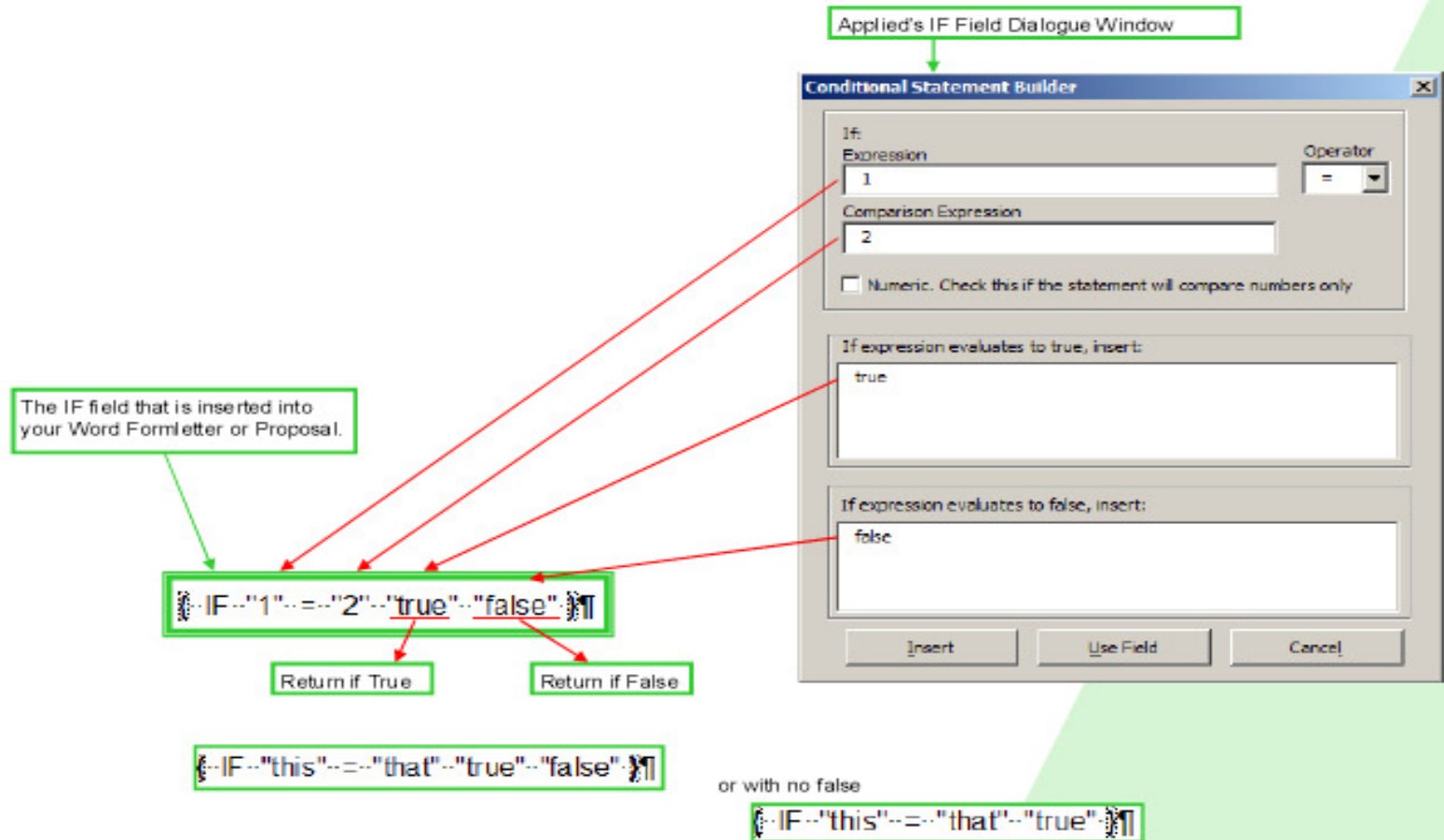
## IF continued - 2003

### ANATOMY OF AN IF STATEMENT



## IF continued - 2007

### ANATOMY OF AN IF STATEMENT



## Word Styles – 2003

### Customizing Documents with Word Styles—Word 2003 Version

**Introduction** Word Styles, if used properly will make formatting and updating of your proposal documents in a consistent manner much easier. Styles are also a very easy way to control Document Mapping which allows for ease of movement between the pages of a long document, important especially for proposal documents.

### Navigation:

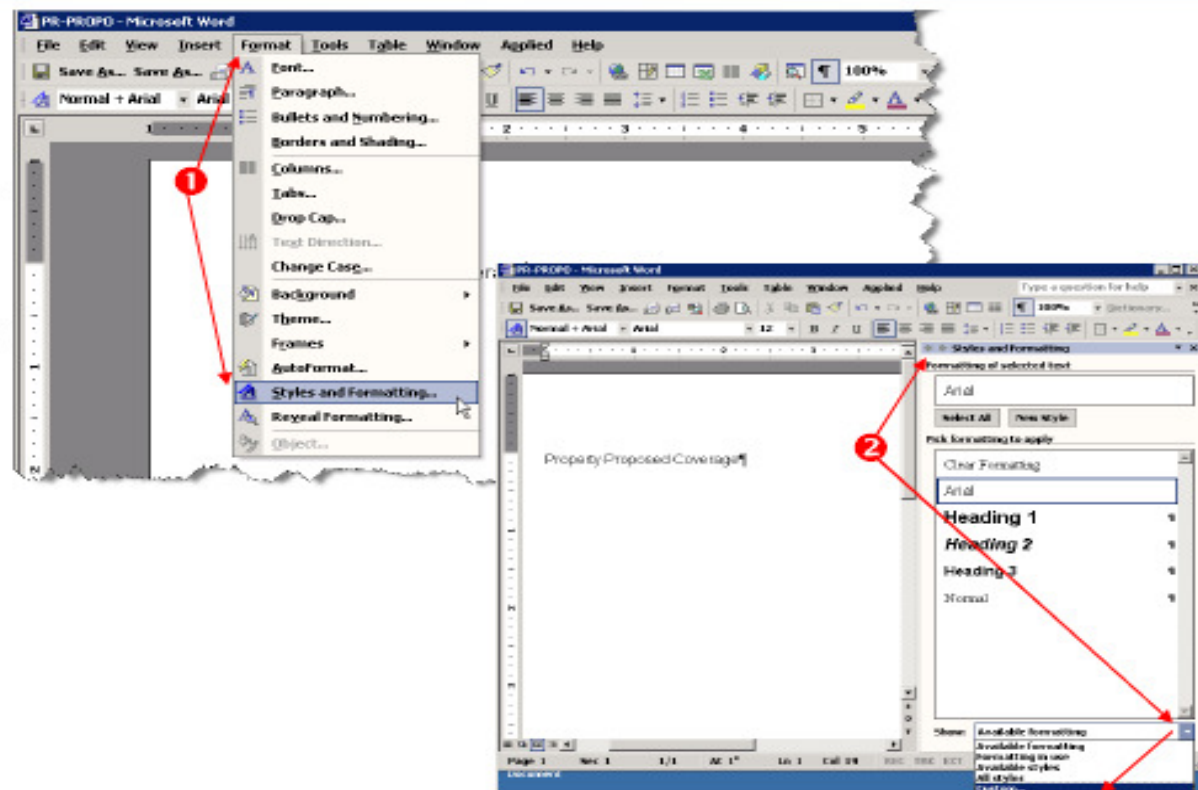
Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Ignore Word Styles at your peril. If you do not control them, they will attempt to assert themselves in ways that will aggravate you!

#### To create and apply styles in one document

- 1 Within your document, from the Menu Bar, select Format, Styles and Formatting.
- 2 From the Styles and Formatting Window, select Available Formatting from the Show box at the bottom, then Custom.
- 3 Select Styles from the Format setting window at the lower left
- 4 New



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## Word Styles – 2007

### Customizing Documents with Word Styles—Word 2007 Version

**Introduction** Word Styles, if used properly will make formatting and updating of your proposal documents in a consistent manner much easier. Styles are also a very easy way to control Document Mapping which allows for ease of movement between the pages of a long document, important especially for proposal documents. This task is written using Word 2007 which is compatible with TAM 9.1 and higher.

### Navigation:

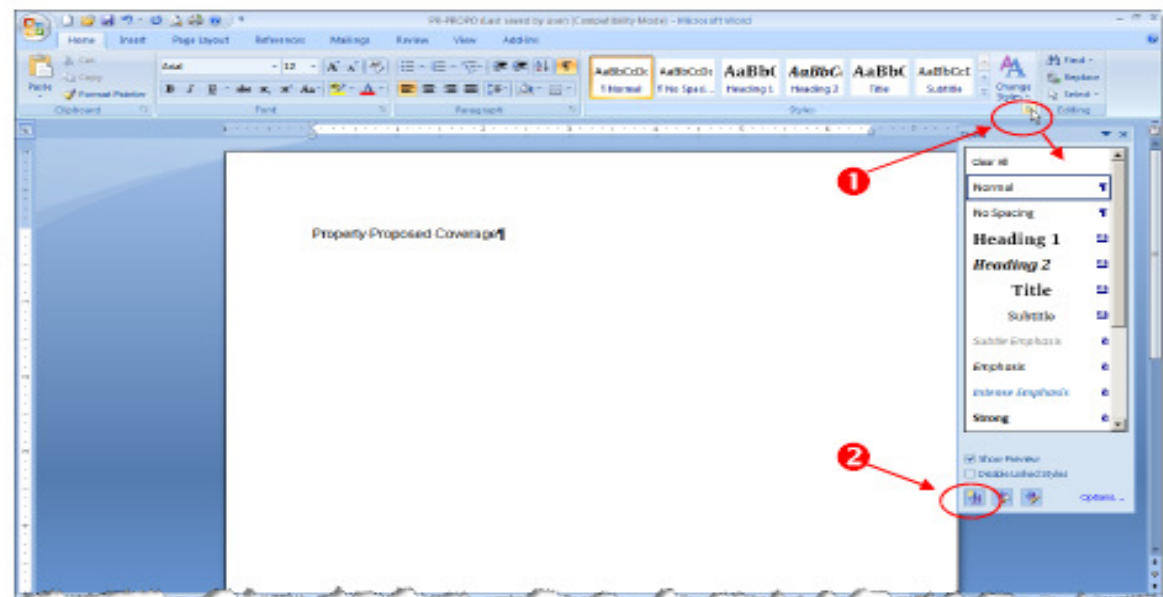
Utilities, + by General + by Document Maintenance, Document Setup and the Selection Arrow

### Step by Step

Ignore Word Styles at your peril. If you do not control them, they will attempt to assert themselves in ways that will aggravate you!

#### To create and apply styles in one document:

- 1 Within your document, from the Home Command Tab, select the expand button in the Styles Command Set.
- 2 From the Styles dialog box, select the New Icon at the lower left.
- 3 The Create New Style from Formatting window will appear.



## Styles continued – 2003

**5** Name Style with some consistent standard. Suggestion, start with the number 1 then a dash, then what it is the style will accomplish and perhaps the font size and features (e.g. 1-Heading 16 Bold). Keep the naming consistent so that all of your styles are grouped together (and a number will put them at the top of the list).

**6** Select:

- Style Type of Paragraph
- Style Based on should be set to "(no style)" to be sure that individual workstation settings have no impact on the merged proposal document.
- Select the formatting features for Font, size, placement, bolding, color, etc.

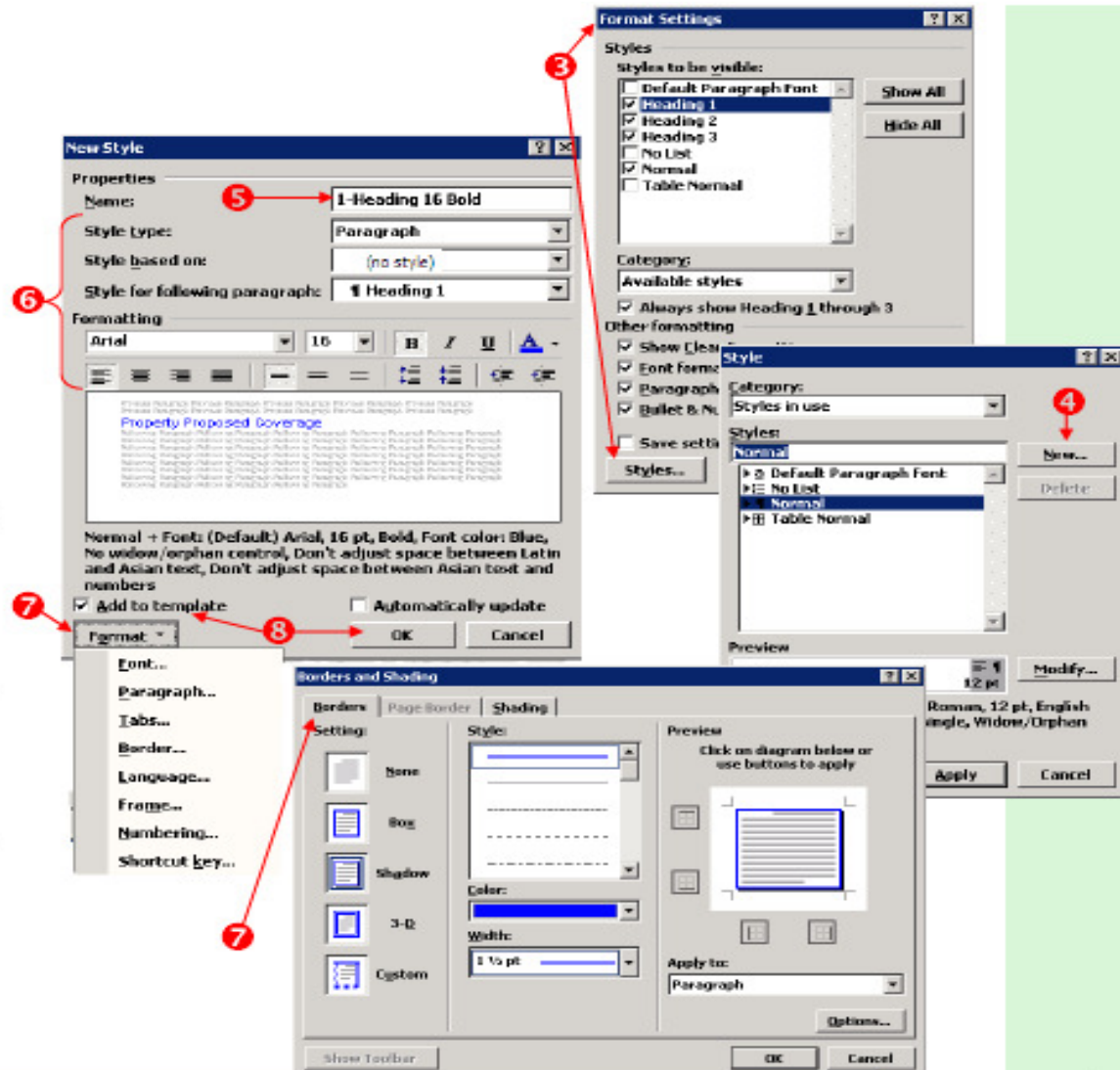
**7** Select additional formatting characteristics from the format selection:

- Borders and shading
- Paragraph for spacing before and after, outline level, and line indentation.

Note additional screenshots on the next page.

**8** Check box to add to template and OK.

Continued on next page



## Styles continued – 2007

④ Name Style with some consistent standard. Suggestion, start with the number 1 then a dash, then what it is the style will accomplish and perhaps the font size and features (e.g. 1-Heading 16 Bold). Keep the naming consistent so that all of your styles are grouped together (and a number will put them at the top of the list).

⑤ Select:

- Style Type of Paragraph
- Style Based on should be set to "(no style)" to be sure that individual workstation settings have no impact on the merged proposal document
- Select Style for following paragraph (either the same as this style, or you might want to use your 1-Normal once that is set up)
- Select the formatting features for Font, size, placement, bolding, color, etc.

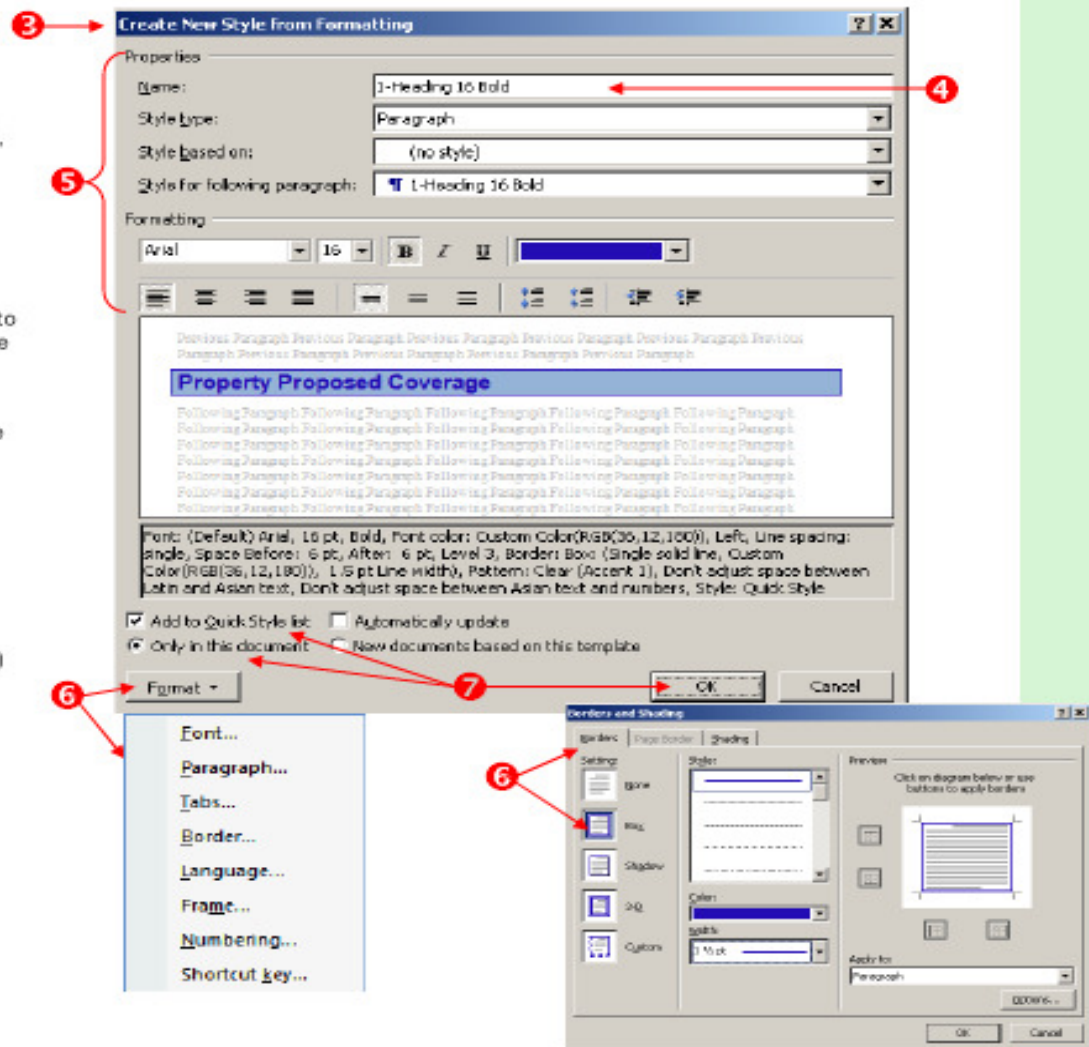
⑥ Select additional formatting characteristics from the format selection:

- Borders and shading
- Paragraph for spacing before and after, outline level, and line indentation.

(Note additional screenshots on the next page.)

⑦ Check box to add to Quick Style List and Only in this document, and OK.

Continued on next page





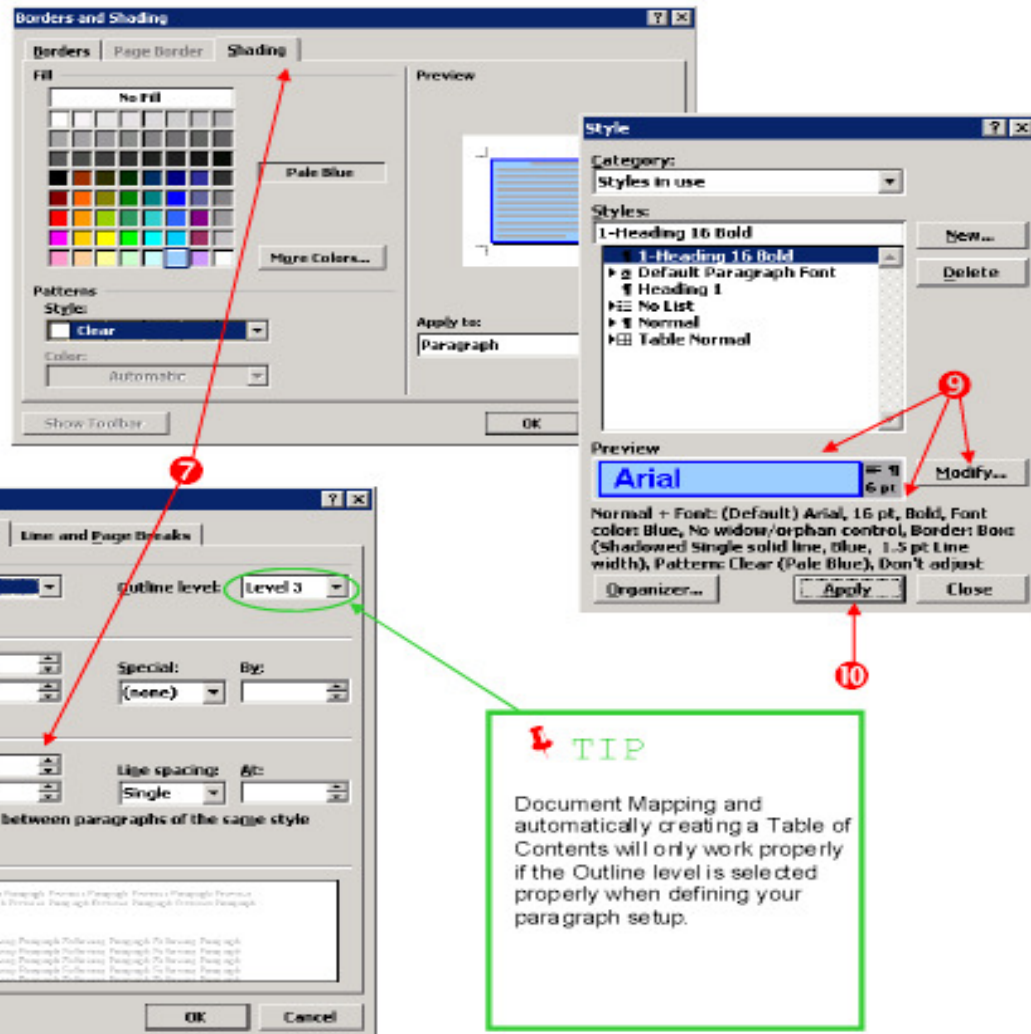
## Styles continued - 2003

9 Review the preview of the style and modify as needed.

10 Select Apply to apply this style to the highlighted text. Alternatively, Select line or lines of text and apply Styles from Styles and Formatting Window, or using Style box from the Formatting toolbar.

Note, when a line is selected, the style that has been applied will appear in both the Style box on the Formatting toolbar and in apply Styles in the Styles and Formatting window.

Continue this process until as many styles as needed are created.



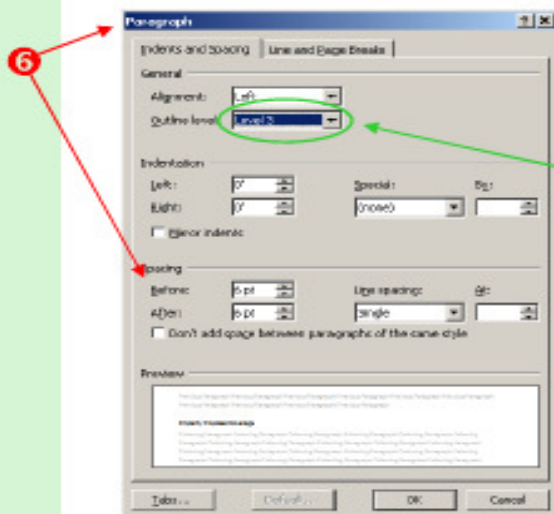
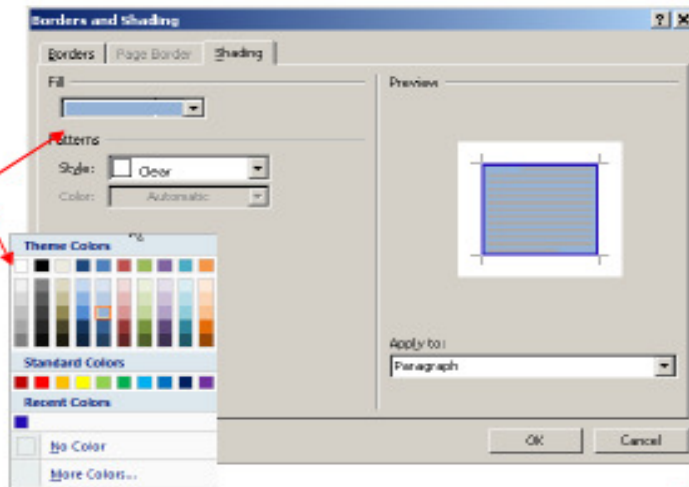
## Styles continued - 2007

**8** Review the preview of the style in the Quick Style List or the Styles dialog box and right click to modify as needed. Note that by hovering over the style in the Quick Style List, you can see the affect the style would have on the text.

**9** Apply the styles by selecting line or lines of text and use the Quick Styles list of the Styles Window.

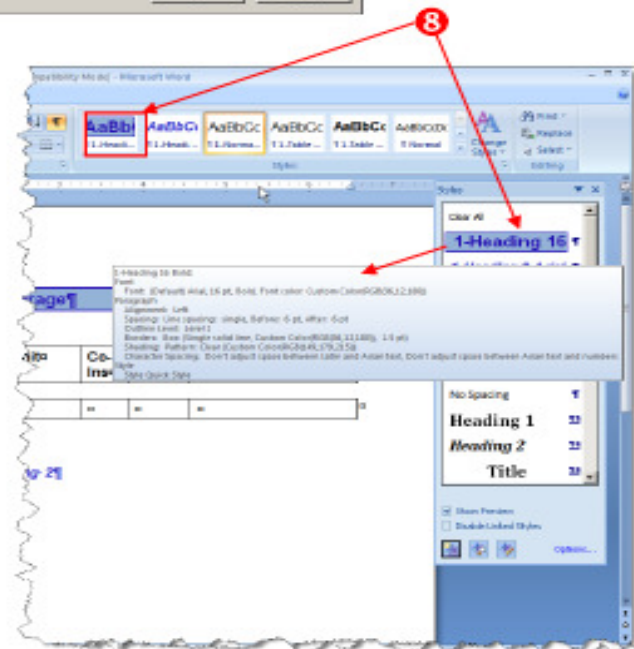
Note, when a line is selected, the style that has been applied will appear highlighted in both the Quick Style List and in the Styles dialog box.

Continue this process until as many styles as needed are created.

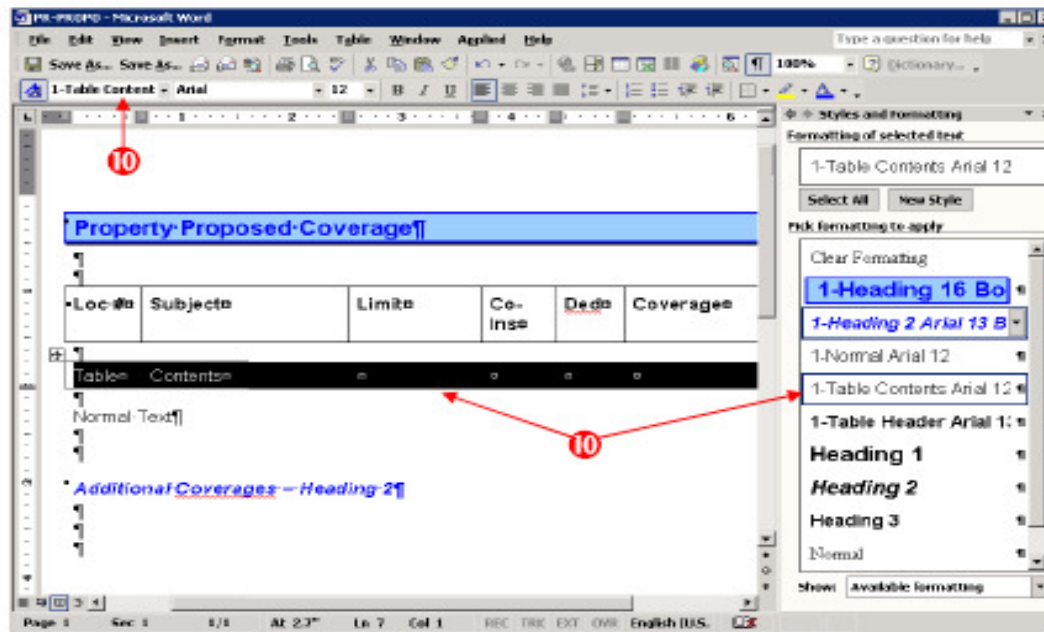


### TIP

Document Mapping and automatically creating a Table of Contents will only work correctly if the Outline level is selected properly when defining your paragraph setup.



## Styles continued – 2003



Note, the styles listed are reflected in the document section of this screenshot

Continued next page

### TIP

When working in document setup and using Styles, it is helpful to have the Styles selection box available on the Formatting Toolbar. Make sure it is available on your toolbar, or to see both the Standard and Formatting toolbars on two rows, access View, Toolbars, Customize, Options Tab, and select the option to view on two rows (choice of option will vary depending upon version of Word installed).

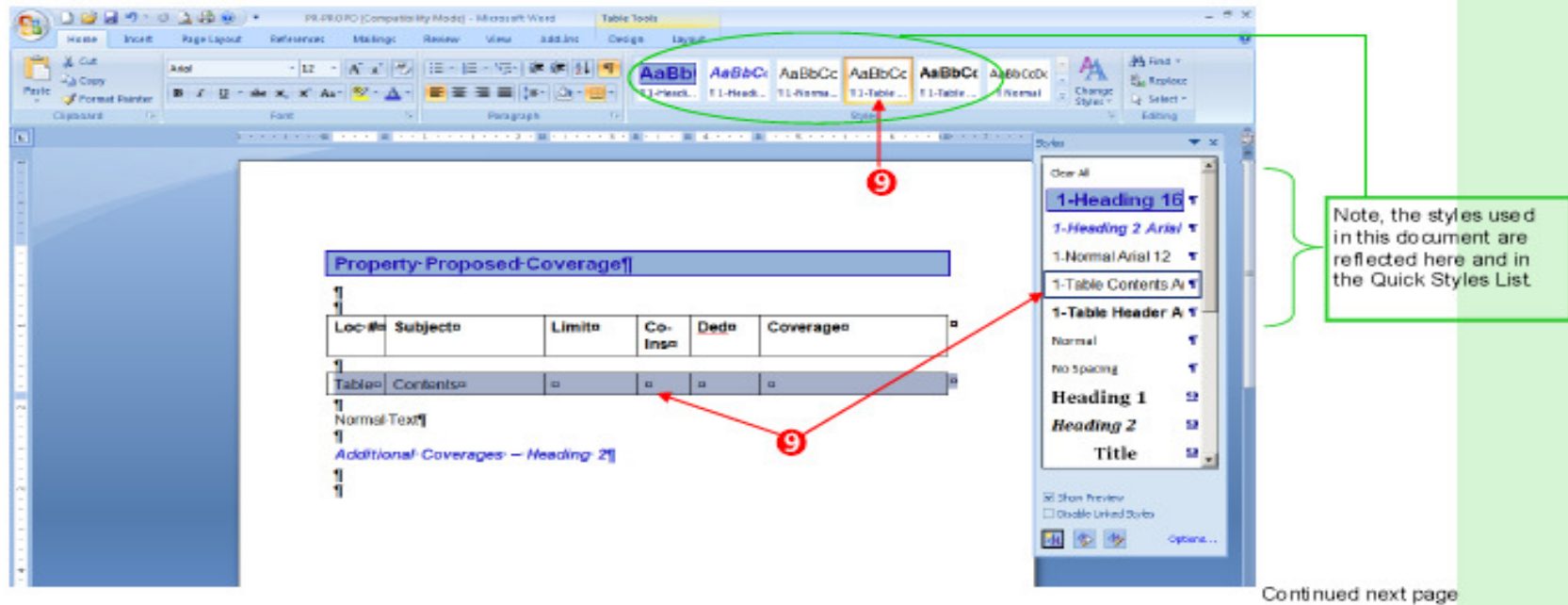
### NOTE

Locating the Styles area will differ with the version of Word on the Workstation. Instructions here are for Office XP and higher.

### BRIGHT IDEA

When creating your agency's formletters and proposals, create your own styles and make sure that every single line of each document has one of your own styles applied to it. TAM's interface with Word seems to leave your created styles alone where it will affect Normal and Body Text (especially) differently on different workstations.

## Styles continued – 2007



Note, the styles used in this document are reflected here and in the Quick Styles List.

Continued next page

### TIP

When working in document setup and using Styles, it is helpful to have the Styles for your document available in the Quick Styles List. For that to occur you must have checked the Add to Quick Style List box when creating your styles.

### TIP

Remember that with Word 2007 you can select your text and merely hover over a style on the Quick Styles List to preview how that style will make your text look if you select it.

### BRIGHT IDEA

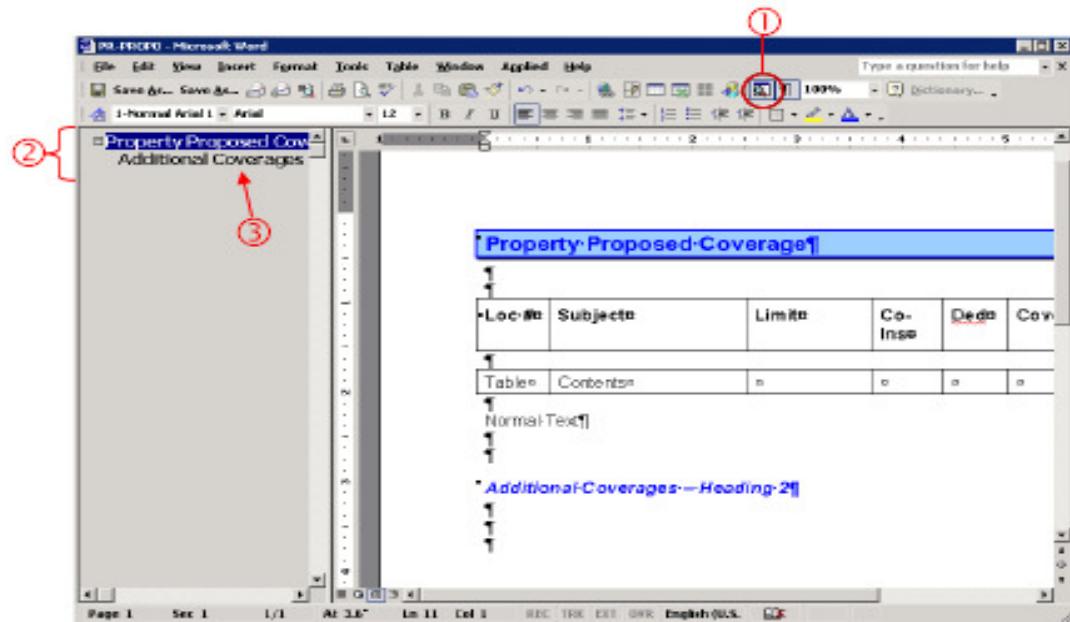
When creating your agency's formletters and proposals, create your own styles and make sure that every single line of each document has one of your own styles applied to it. TAM's interface with Word seems to leave your created styles alone where it will affect Normal and Body Text (especially) differently on different workstations.



## Document Mapping 2003

### Document Mapping Feature:

- ① Once your styles have been created based upon the proper Outline Levels, the document mapping feature can be turned on and off using the document mapping icon on the Standard Toolbar. The window which opens on the left of the document will show the heading levels.
- ② For this individual document we set up only two styles based on Heading 1 and Heading 2 (which is inset). Notice that the levels can be expanded or collapsed using the + sign next to the outline.
- ③ To move to a different area of the document, merely select the heading in the left window, and the document will move to that heading selected in the right window.



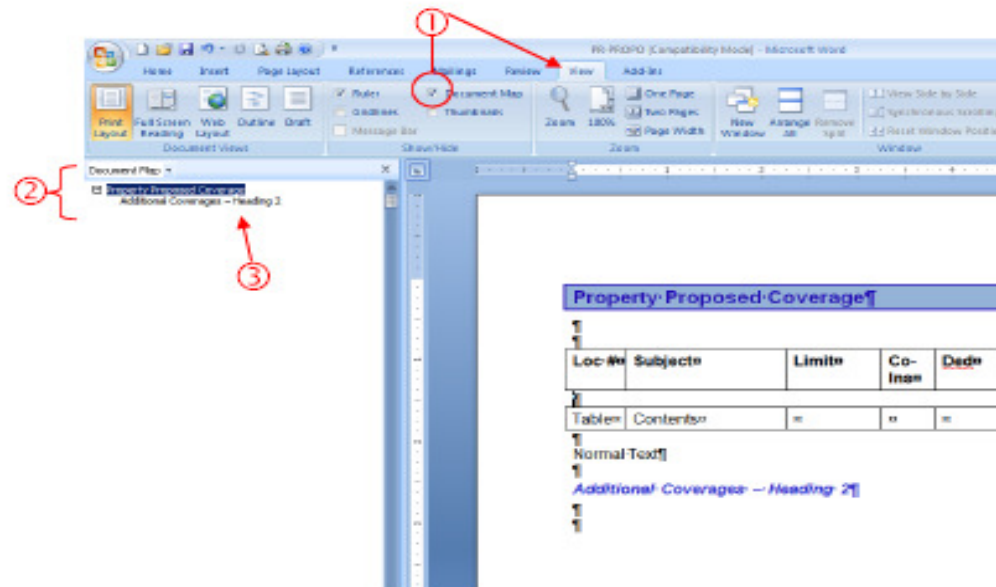
### >BRIGHT IDEA<

When the styles you set up are placed consistently in all proposal documents in a proposal setup, it will allow the user to move through a multi-page document with ease to do their final editing once the proposal has been merged on the client screen. Save your users the time every time they merge a document by spending time to learn and utilize Styles during document setup. It will assist your users in improving their efficiency.

## Document Mapping 2007

### Document Mapping Feature:

- ① Once your styles have been created based upon the proper Outline Levels, the document mapping feature can be turned on and off using the document mapping checkbox on the View tab of the ribbon. The window which opens on the left of the document will show the heading levels.
- ② For this individual document we set up only two styles based on Heading 1 and Heading 2 (which is inset). Notice that the levels can be expanded or collapsed using the + sign next to the outline.
- ③ To move to a different area of the document, merely select the heading in the left window, and the document will move to that heading selected in the right window.



### ≡BRIGHT IDEA≡

When the styles you set up are placed consistently in all proposal documents in a proposal setup, it will allow the user to move through a multi-page document with ease to do their final editing once the proposal has been merged on the client screen. Save your users the time every time they merge a document by spending time to learn and utilize Styles during document setup. It will assist your users in improving their efficiency.

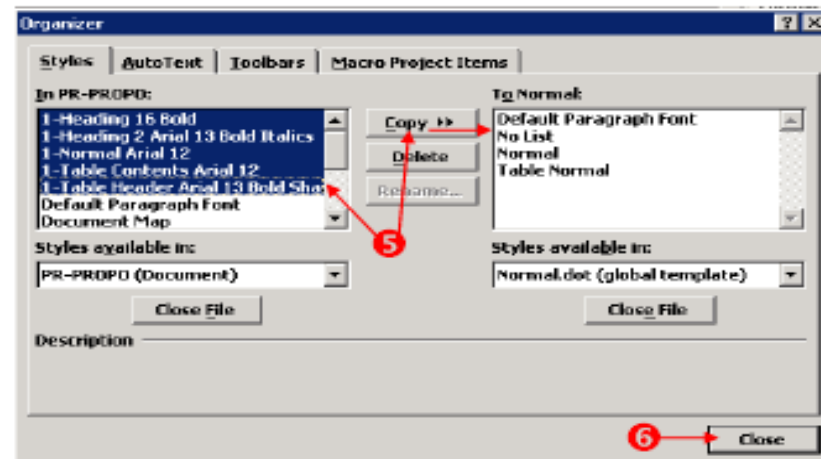


## Moving Styles - 2003

### To Move these Styles from one document to another:

Before Exiting Document with the Styles created (or go back into a document that contains the Styles):

- 1 Access Format Styles from the Menu Bar.
- 2 From the Styles and Formatting Window, select Available Formatting from the Show box at the bottom, then Custom (see screenshot on the first page of this task).
- 3 Select Styles from the Format setting window at the lower left
- 4 Select Organizer
- 5 Select the styles created from the left hand window listing the styles in this document and select the Copy button to move them into the right window which is Normal.Dot
- 6 Close.
- 7 To create a new document (which will not have these styles in it), repeat steps 1 to 4 above, then select the Styles needed from the right hand window listing the styles in Normal.Dot, and copy them into the left hand window for this new document, then close once complete. The Styles will now be available for you to use in this new document.



### TIP

Even if you may not necessarily need all the styles you have created in a page of a proposal, copy them all in anyway so that they are available should you decide to change your form in the future, or should you wish to copy them from here to the next document you create.

### ≡BRIGHT IDEA≡

The Styles created reside in the Normal.dot which is workstation specific. If the document setup person uses the same workstation consistently, those styles will always be there. Should there be a different workstation used, merely call up an existing document that has the styles you wish to use included, and copy them to the Normal.dot on the new station to make them available to use for new documents created on this station.

### SEE ALSO...

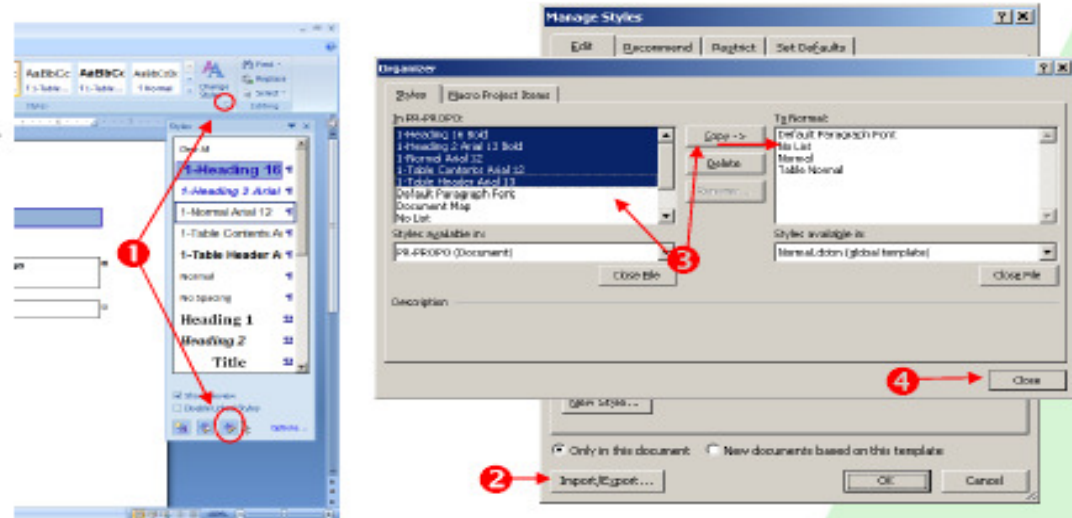
Creating Formletters  
Creating Proposal Templates  
Merging a Formletter  
Merging a Proposal

## Moving Styles - 2007

### To Move these Styles from one document to another:

Before Exiting Document with the Styles created (or go back into a document that contains the Styles):

- 1 Within your document, from the Home Command Tab, select the expand button in the Styles Command Set, then select the Manage Styles icon.
- 2 From the Manage Styles dialog box, select the Import/Export button.
- 3 From the Organizer window, select the styles created from the left hand window listing the styles in this document and select the Copy button to move them into the right window which is Normal.Dot.
- 4 Close.
- 5 To create a new document (which will not have these styles in it), repeat steps 1 to 4 above, then select the Styles needed from the right hand window listing the styles in Normal.Dot, and copy them into the left hand window for this new document., then close once complete. The Styles will now be available for you to use in the new document.



### TIP

Even if you may not necessarily need all the styles you have created in a page of a proposal, copy them all in anyway so that they are available should you decide to change your form in the future, or should you wish to copy them from here to the next document you create.

### BRIGHT IDEA

The Styles created reside in the Normal.dot which is workstation specific. If the document setup person uses the same workstation consistently, those styles will always be there. Should there be a different workstation used, merely call up an existing document that has the styles you wish to use included, and copy them to the Normal.dot on the new station to make them available to use for new documents created on this station.

### SEE ALSO...

Creating Formletters  
Creating Proposal Templates  
Merging a Formletter  
Merging a Proposal

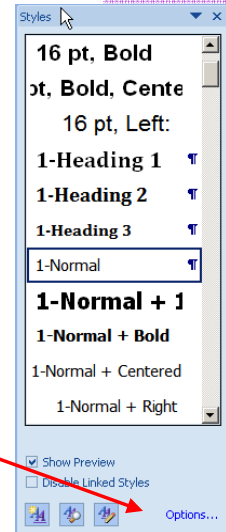
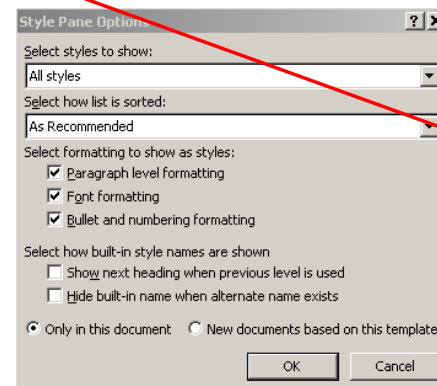
## Styles in the Quick Styles Gallery – 2007

From the Home Tab select the **Styles** drop down arrow.

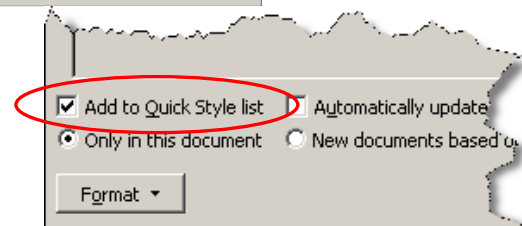
Select Options from the Styles window.

From the Style Pane Options box, select or confirm that All styles appears in the Select styles to show drop down box, then cancel that window.

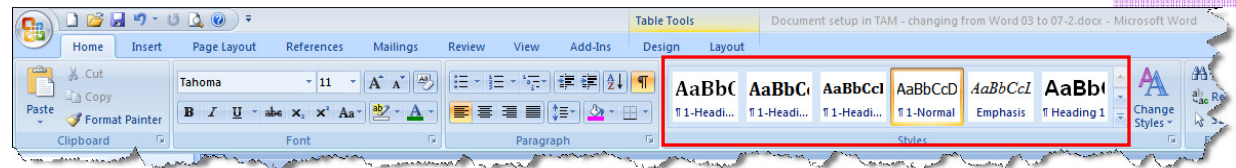
With the Styles window open, highlight text in your document, and select the Styles that you wish to see in the Quick Styles Window.



Also, when adding a new Style, check the box in the lower left to Add to Quick Style List.

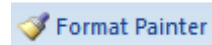


The Styles you apply will move into the Quick Styles window.



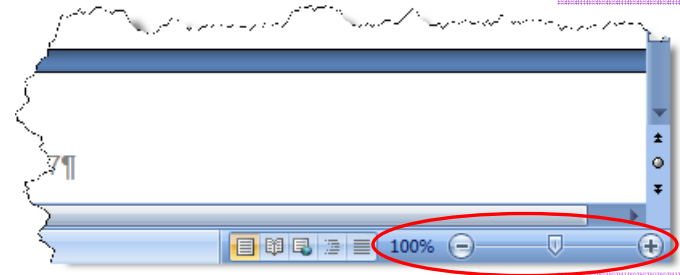
## Cool Little Things you may not have noticed in 2007

The **Format Painter** is located on the Home Command Tab on the Clipboard Command Set, and works the same as in earlier Word versions.

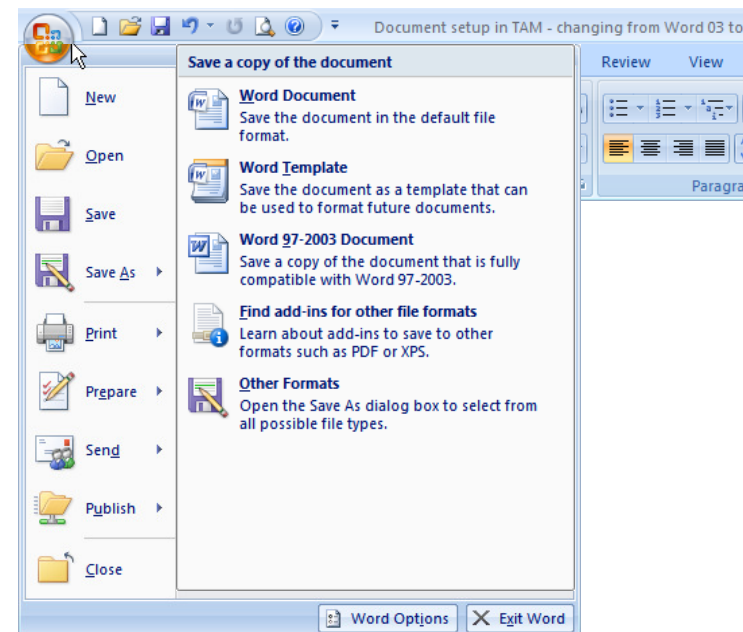


To control the **Preview** size of your document onscreen, use the Zoom Level controls at the lower right of the screen.

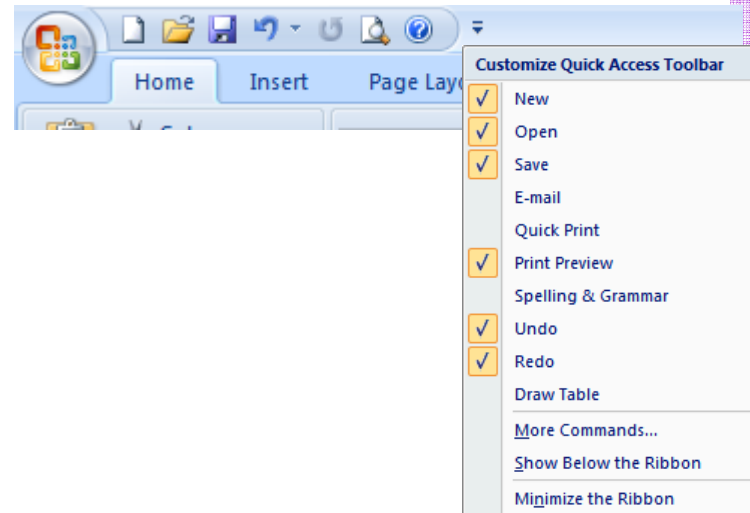
The preview size can also be controlled by using CTRL plus the scroll wheel on the mouse (which is the same as in Word 2003).



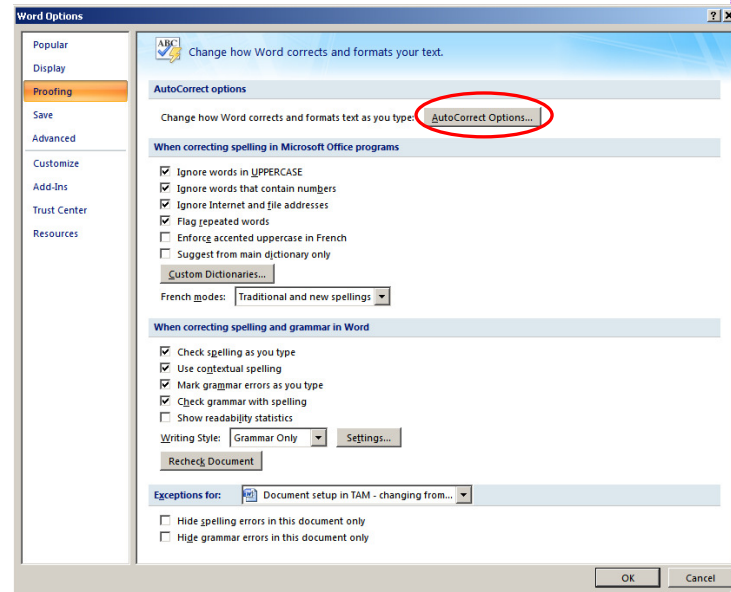
Save As is accessed from the Microsoft Office Button and allows for saving documents in Office 97-2003 format.



Add items to the **Quick Access Toolbar** at the top of the document by selecting the drop down arrow at the end of the row and selecting the icons to include.

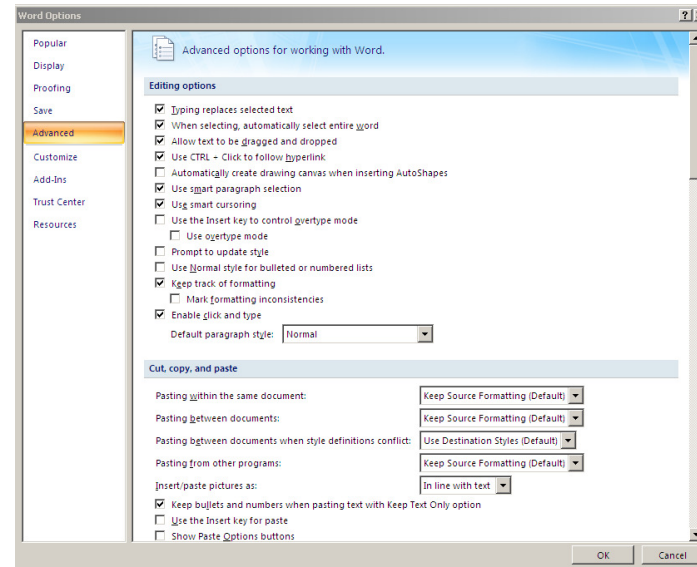


**Autocorrect** Options are located under the Microsoft Office Button, and Word Options (at the lower right of the window), then the Proofing choice, and AutoCorrection Options in the window.

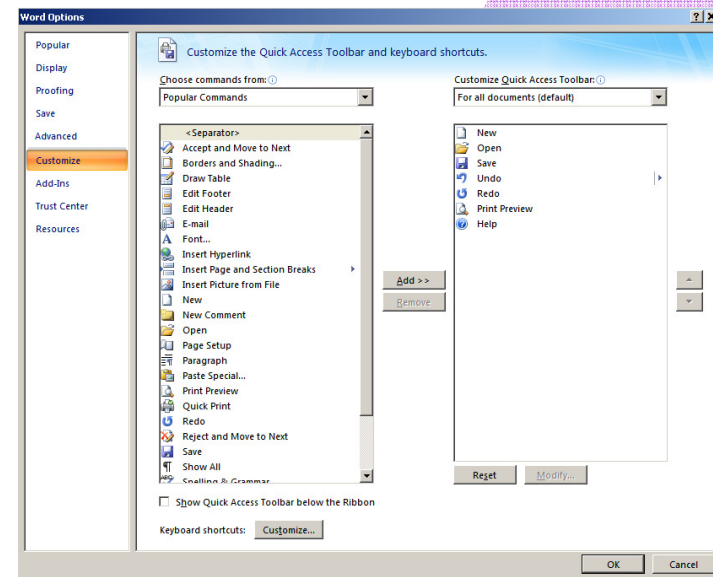


**Advanced Options for working with Word** are located in the same area but under the Advanced choice.

Editing and Cut, Copy and Paste options for the workstation's use of Word are controlled from this window.



The **Quick Access Toolbar** can also be customized from the same area by selecting Customize in the window, and selecting from left window and moving to the right.





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**Notes:**