

SEMINAR HANDOUT

Microsoft® Word® - Formatting Numbers, Text and Dates

Applied Epic/Microsoft® Word® - Formatting Numbers, Text & Dates

SESSION HANDOUT



APPLIED|NET
Client Network Conference

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Target Audience

<input type="checkbox"/>	Accounting
<input type="checkbox"/>	Non-Insurance Accounting
<input checked="" type="checkbox"/>	Administrative
<input checked="" type="checkbox"/>	Principal
<input checked="" type="checkbox"/>	General
<input type="checkbox"/>	Human Resources

<input checked="" type="checkbox"/>	Account Executive
<input checked="" type="checkbox"/>	Customer Service Representative
<input checked="" type="checkbox"/>	New Producer
<input checked="" type="checkbox"/>	Experienced Producer
<input checked="" type="checkbox"/>	IT
<input checked="" type="checkbox"/>	Trainer

Seminar Type

Microsoft Products

Seminar Level

Advanced: An advanced level course facilitates the development of thoughts (ideas, theories, procedures) to the most advanced stage possible. For functional courses, the objectives taught at this level challenge learners to analyze and make business decisions on how to utilize the agency management system or software in their agency, or apply a high level of technical aptitude to understand in depth features and functionality.

Class Description

You will review additional ways in which we customize the data in order to generate a client-friendly proposal.

Learning Outcomes

You can:

1. Define the way you want dates to appear - 1/1/15 or January 1, 2015
2. Control how numbers appear – with/without \$ signs and cents
3. Make sure vehicle makes print correctly – GMC in upper case but Chevrolet in upper/lower case

Assumptions

This seminar is based on the following

Applied Epic Version 2014

Microsoft® Word Version 2010/2013



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SESSION HANDOUT

Microsoft® Word® Formatting Numbers, Text and Dates



There are a number of reasons why we want to be able to control the way that information is presented in our proposals. We may sometimes want dates spelled out – January 1, 2013 – while other times we want them in the 1/1/13 format. Limits and value fields are sometimes stored in Epic without the \$ sign or commas, or sometimes with far too many decimal places, but we want them to appear in our proposal as \$1,000,000, not 1000000. And text fields – the entry options in many cases are uncontrolled. We can use upper case or lower case; abbreviations, typos – but we want our proposal to say Chevrolet not CHEV.

Formatting Fields Available in Word

There are many fields available in Word in addition to the ASK and IF fields that are on the Applied/Word Interface menu. You can see the full list in Word by going to Insert, Quick Parts, Field. Two fields that are essential in proposal templates are the Formula field, { = }, for formatting numbers; and the Quote field, { QUOTE }, for formatting text. You can incorporate various formatting instructions within these field commands so that numbers, dates and text appear the way you wish, regardless of how they are entered in the database or the responses to ASK statements.

A Word field begins and ends with curly brackets, { }. Typing in the curly brackets from your keyboard will not create a Word field. You need to insert them from the Insert ribbon as described above. Once you are familiar with a particular field and how to format it, you can save yourself time and mouse clicks by inserting a blank field using CTRL+F9, then typing the field command and any options between the curly brackets.

As you are working with Fields and formatting them, if either the field disappears from the screen or you can't see all of the formatting that you know is there, press ALT+F9 to reveal the field coding & formatting.

For more information about fields and the options that are available, search Word Help for “fields”, “field codes” or “field switches”.

Formatting Numbers

In order to precisely and consistently control the appearance of Coverage limits being merged into a template or proposal, the Formula { = } field can be used like this:

```
{ = {datafield} \# $#,### }
```

This format will fail if the data field is empty and you will get an “Error!” message in the merged proposal. To avoid this, we can use an IF statement to test the field first and force a zero into the formatting expression if the field is blank.

The number formatting field in Word can hold settings for three different kinds of numbers: positive, negative, and zero. In the simple example above we only included the formatting for positive numbers, but we might occasionally need to consider negative numbers (premium discounts in the Workers Compensation application, for example), and we will definitely encounter zeroes.

The way these three options are shown in the field code is ***\# positive;negative;zero***. Notice that the number types are separated by semi-colons. In addition we have the ability to include text as a formatting option for any of the number types. For instance, for a deductible you might want to print “No Deductible” or “None”; if a limit field is blank, you might want it to print out as “No Coverage”.

To include this text as part of the number formatting, enclose the ENTIRE formatting string, beginning before the “\$” sign in double quotes, separate the number format from the text you want to use by two semi-colons AND enclose the text in single quotes. It will look like this: ***\# “positive;negative;’text here for zero option”***

In Applied Epic, blank fields are usually stored as true blank fields. So to test for a blank field you need to put the two quotation marks right next to each other with nothing in between them.

So our limit field formatting, with the IF statement test for a blank field, looks like this:

```
{ = { IF "{DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Coverages.LiabilityCombinedSi
ngleLimit.CSL.Limit1*8*42 }" <> " " "{DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.BusinessAuto.Coverages.LiabilityCombinedSi
ngleLimit.CSL.Limit1*8*42}" "0" } \# "$#,###;,'No Coverage" }
```

Text

Generally, you want text formatted in upper and lower case (not ALL CAPS), but data may be entered in applications in any number of ways. You can use the {QUOTE} field with the appropriate switches to change the appearance of the field value in the merged document:

{QUOTE { datafield } * Caps}	Each Word Starts With an Uppercase Letter
{QUOTE { datafield } * Upper}	ALL UPPERCASE
{QUOTE { datafield } * Lower}	all lowercase

That seems simple enough. But what about GMC, BMW, and VW? You don't want them to print as Gmc, Bmw, and Vw. So we have to use a nested IF statement to test for them, and only apply the text formatting if it isn't any of those three makes.

Here's the final result, with each nested IF statement in a smaller font to make it clearer how it works:

```
{IF "{ DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.BusinessAuto.RiskMerge.Vehicles.Vehicle.VehMake*0*103 }" =
"GMC" "GMC" "{IF "{ DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.BusinessAuto.RiskMerge.Vehicles.Vehicle.VehMake*0*103 }" =
"BMW" "BMW" "{IF "{ DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.BusinessAuto.RiskMerge.Vehicles.Vehicle.VehMake*0*103 }" =
"VW" "VW" "{QUOTE { DOCVARIABLE APP.BA2.MAKE } \* Caps}"}" }
```

Use the Wild Card Character

Epic controls data entry much more strictly than Applied TAM did. For example, in the Cause of Loss field on the Property application in Epic, there is a list of codes with corresponding descriptions. You cannot just type in a description like "Special", instead you must pick the appropriate code for the different types of Special. This can be a problem if you are merging in the description to your proposal since it will be longer than will fit comfortably inside of a table cell.

So there will be entry variations in the applications that are variations that we may want to condense down into a shorter, simpler, word or phrase. It is possible to build a separate IF statement to check for each possible code, but the wildcard characters of "*" and "?" can be used to make a single IF "catch" many different variations on a theme.

Using our Cause of Loss example above, the asterisk (*)wild card character could be used to test for SPC, SPCDT, SPCEX in a single IF that would look like this:

```
{IF "{DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.Property.RiskMerge.Subjects.Subject.CausesOf
Loss.SubCausLoss.Code*0*24}" = "SPC*" "Special" "{DOCVARIABLE
```

MasterAccountMerge.Policy.Line.LOB.Property.RiskMerge.Subjects.Subject.CausesOf Loss.SubCausLoss.Description*0*55 }" } will find anything that starts with the characters SPC as the code and insert the description Special in your proposal. Just be careful you don't make it so generic you combine things that are different.

Fields that might contain numbers or text

There are some fields in Applied that might contain numbers or text. For instance, a limit field might have a number in it or the word "Included". The formatting techniques described above only work if the field contains data of the expected type. However, with yet another IF statement we can get around this.

If there are only a limited number of possible text entries, and we know what they are, we can test for them specifically in the same way we tested for GMC etc above. In the "false" section of the innermost IF statement, instead of the QUOTE field put the number formatting field.

If we have no idea what text might be entered, we can take advantage of the fact that Word considers letters to have a higher "value" than numbers. So, we test the first character of the field to see if its value is less than the lower case letter "a". If it is, we apply number formatting; if not, we apply text formatting. Here is an example of this field formatting:

```
{ IF "{ DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.Custom.[CustomLine.65541].PropertyAdditional
Coverages.378903d8-bb07-43ee-99f1-b78954fb6b2c.Demolition*0*6 }" < "a" "{ = { IF "{
DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.Custom.[CustomLine.65541].PropertyAdditional
Coverages.378903d8-bb07-43ee-99f1-b78954fb6b2c.Demolition*0*6 }" <> " " "{
DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.Custom.[CustomLine.65541].PropertyAdditional
Coverages.378903d8-bb07-43ee-99f1-b78954fb6b2c.Demolition*0*6 }" "0"}\#
"$#,###;:'No Coverage" }" "{QUOTE { DOCVARIABLE
MasterAccountMerge.Policy.Line.LOB.Custom.[CustomLine.65541].PropertyAdditional
Coverages.378903d8-bb07-43ee-99f1-b78954fb6b2c.Demolition*0*6 } \* Caps}"} }
```

Note: This use of field switches will not work if the field contains mixed numbers and text ("\$5,000 Included"). Unfortunately, there is no way to test for and correctly format this kind of entry.

Dates

By default, dates will print as xx/xx/xx – for instance, 01/30/15. You may want the date written out – as January 30, 2015. For this, use the { QUOTE } field:

```
{ QUOTE "{ DOCVARIABLE  
MasterAccountMerge.Policy.Line.Line.Dates.LineEffDate*1*4 }" \@ "MMMM d, yyyy" }
```

Or maybe you just want the year: { QUOTE " { DOCVARIABLE
MasterAccountMerge.Policy.Line.Line.Dates.LineEffDate*1*4 }" \@ "yyyy" }

There are many more ways of formatting than the examples shown here. For additional information, go to Help in Word and search for Field Codes.

A Couple of Additional Notes on Formatting

The MERGEFORMAT switch

Sometimes you have everything set up just the way you want it, using all the techniques we've described, then you discover that when you use the document at the client level, the information is in a different font, or it's bolded, or some other changes has taken place. By default Word adds a switch to every field in a document - * MERGEFORMAT. This tells Word to ignore the formatting you've applied to the field in your document and apply some other formatting – and I've never figured out where that other formatting comes from.

The cure is to replace the MERGEFORMAT switch with the CHARFORMAT switch. If you use Alt-F9 to show all your field codes you'll see the offending MERGEFORMAT switches. I suggest using Find & Replace to get rid of all of them in one fell swoop.

Styles

Styles define the appearance of various text elements of a document, such as headings, captions, and body text. When a style is applied to any portion of a document, multiple character or paragraph format options will be applied in a single operation.

What this means for us is that it is very important that we control the styles we are using. This session isn't going to go into detail on how to set up and use styles, but it is important that you understand the impact styles can have on your documents. If you have the document set up and working perfectly on your workstation, but another user is getting different formatting at their workstation, the problem is almost certainly styles and you need to know how to fix that.

Appendix

Other Classes and Handouts from the Proposal Track Series

- Proposals and the Power of Graphic Design – This class also includes information on a Style Guide you may find useful for your design specifications.
- Microsoft® Word® – Introduction to the Epic Interface – Install Free Set – Includes instructions for downloading and importing templates.
- Intermediate Word Formatting – Applied Epic – includes Tables, Borders & Shading, Section Breaks, headers & footers, etc.
- Leveraging Microsoft® Word® - Applied Epic
- Applied Epic/Microsoft® Word® - IF, ASK, Math, SET, Bookmarks, INCLUDETEXT (Service Roles)
- Applied Epic/Microsoft® Word® – Formatting Numbers, Text & Dates
- Applied Epic Proposal Workshop / Advanced Clinic – this session has no handouts and will be based upon questions and issues brought to the group by the attendees.