IncludeText Field Tutorial (Ribbon Versions)

by Charles Kenyon

## Introduction

This tutorial developed out of answering a question at [Woody’s Word Lounge](http://www.wopr.com/cgi-bin/w3t/postlist.pl?Cat=&Board=wrd). I put it together to make sure that what I was saying was accurate. The purpose is to show how the IncludeText field can be used to cross-reference between documents. In this tutorial I refer to the two documents involved as the source document and the target document. The source document (IncludeTextSource.docx) is the document that has text which we are going to include in our target document (IncludeText Field Tutorial.docx). If we want to include only a part of the target document, that part must be marked (in the source) with a bookmark.

This is the Docx version for Word Versions 2007-2021 (including the desktop application in Office 365 but not the mobile apps nor the online version).

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## There are two primary ways to get an IncludeText field in your document.

### Insert 🡪 File

The first is to use Insert 🡪 File and clicking on the arrow next to the Insert button to have it included as a link. (You can also type in a bookmark name but cannot browse for the bookmark.)

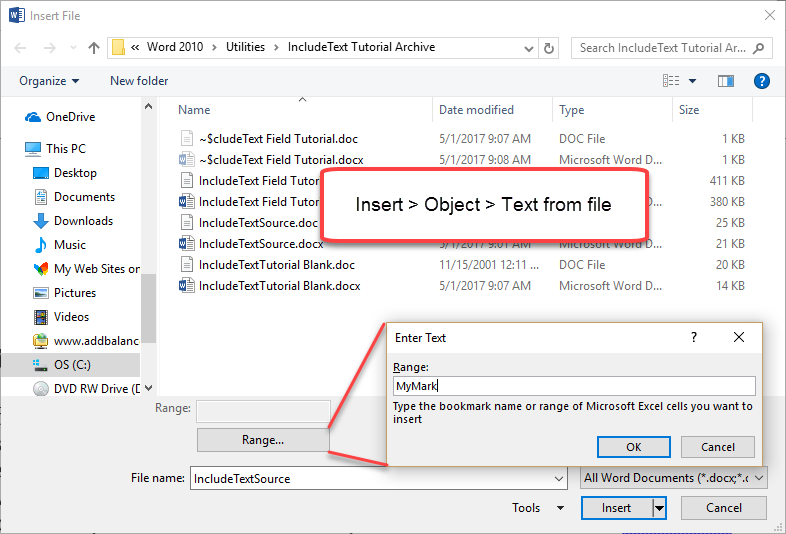


Figure 1 Word 2013 Insert File Dialog Box

### Insert 🡪 Quick Parts 🡪 Field… 🡪 Links and References 🡪 IncludeText 🡪 Options

The second, which gives you more control, is to use Insert 🡪 Quick Parts 🡪 Field… 🡪 Links and References 🡪 IncludeText 🡪 Options which gives you access to the field switches and makes bookmarks easier *but does not let you browse for your target file*.

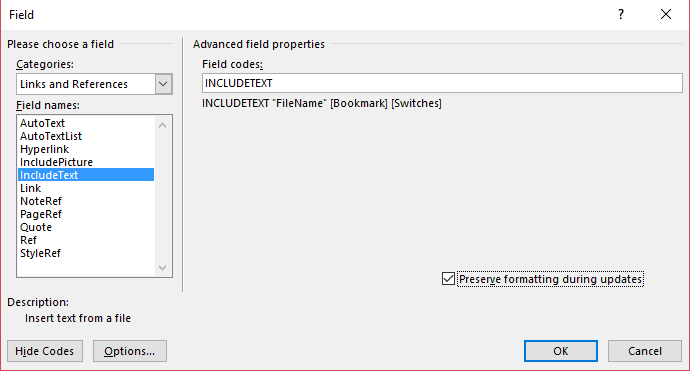


Figure 2 - Insert Field Dialog Box

See the footer of this document for an example

Primarily, this tutorial examines three things about the IncludeText field: the field’s syntax and switches, the impact of styles on the formatting of included text, and the use of a hidden page field in the source document for continuous pagination of separate documents. It also glances as the weird behavior of headers and footers from the source document.

This tutorial does not have any macros but it is liberally sprinkled with marginal notes that may be gems.

## The IncludeText Field – Syntax

**{** IncludeText “*filename and path*” [bookmark] [switches \! \c] **}**

**{** IncludeText “*c:\\My Documents\\filename.doc*” [bookmark] [switches \! \c] **}**

**{** IncludeText “*filename.doc*” [bookmark] [switches \! \c] **}**

Use Insert => Field or Ctrl+F9 to get the proper field codes.

If your target and source documents are in the same folder, no path is needed in earlier versions of Word. Word 2007 required a full path and change this. The fields in this tutorial are set to use relative paths, though. Note that the examples above are not fields because they use typed braces { } rather than field codes. You can not type field codes, you have to use Word to insert them. You can use the keyboard shortcut Ctrl+F9.

## Examples:

Let’s look at the IncludeText field in action. Here are three simple examples:

### IncludeText Field using a bookmark. – No switches.

**Full Path {** IncludeText "C:\\Users\\Charles K. Kenyon\\Dropbox\\Utilities and Downloads on My Website\\IncludeText\\IncludeTextSource.docx" MyMark **}**

**Relative Path {** IncludeText "{ FileName \p }\\..\\IncludeTextSource.docx” MyMark **}**

**Error! Not a valid filename.**

This sentence is *bookmarked* text.

The sentence above is inserted from the document IncludeTextSource.docx. It is at the bookmark “MyMark.” The text brought in is limited to whatever is inside the bookmark. Since there aren’t any formatting switches, it brings along the formatting from the source as well. Or at least it brings in *some* of the formatting. See the section on Styles, below, for details on what changes.

There are two examples. In the first field the full path is used from when the field was inserted. It will not work when these two documents are moved, even if they stay in the same folder but the folder is moved. In the second field, the nested FileName field and punctuation supply the full filepath for a document in the same folder. Thanks to Paul Edstein for this.

### IncludeText Field using a bookmark - \\* CharFormat Switch

I have always found CharFormat preferable to MergeFormat; it uses the formatting for the first non-space character in the field, in this case the “I” in “IncludeText,” and applies it to the entire field result. MergeFormat may only change the formatting of the first word of the field result.

**{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” MyMark \\* CharFormat **}**

This sentence is bookmarked text.

This is the same field with the formatting from the source stripped away using the \\* CharFormat switch. Here it is with different formatting on the first character of the field.

**{** **I**ncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” MyMark \\* CharFormat **}**

**This sentence is bookmarked text.**

Note that it is changed to a bold pink because that is how the first character in the field is formatted.

### IncludeText Field – no bookmark - \! (don't update fields) switch

**{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” \! **}**

-------- marker around field

This is a sample document containing four bookmarks in the text. Three of them with Page fields are hidden. This line43 contains a bookmarked Page field inserted using an ASK field. The name of the bookmarks is AskMark. Display fields and bookmarks in the source document () to see the Ask Field. Even with all of that showing, you will not see the Page field that is inside of the *bookmark*, because the Ask Field hides it. You will see the Page field that is inside the Ask Field.

This sentence is *bookmarked* text. The bookmark name is MyMark. The rest of the paragraph is not bookmarked.

This line contains a hidden text Page field inside of a bookmark. 43 The bookmark name is PageMark. Turn on viewing of hidden text to see the mark. It is intended for use in a document that normally has hidden text concealed. You format text as hidden using Format 🡪 Font.

This paragraph is in the Body Text style. The style has a border in this document, but not in the target document. In the source document, Body Text style is 13 pt. Garamond Text with a purple border. This and the final paragraph are here to show how importing of text formatted using styles is handled with the IncludeText field – much the same way it would be handled if you pasted the text from the source to the target.

This paragraph is in the Body Text Small style (which doesn’t exist in the target document). It is based on Body Text and has the same purple border and is in the Garamond font. However, it is 9pt font size.

This paragraph is in the Body Text style to provide a break.

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This paragraph is in the AbNormal style *(which doesn’t exist in the target document)*. It isn’t based on any other style, has a red border and is in 12 pt. Comic Sans MS font. There is a “frame” to its left which contains a hidden (bookmarked) page field. A field in a frame is a bit tougher to delete than one in the middle of text. You’ll see it if you turn on the display of hidden text. The bookmark for the field in the frame is FrameMark.

--------- marker around field

The field is on a single line but when displayed takes up far more space when displayed. Since there was no bookmark, the entire document is included.

Note all of the original text was formatted with a border and was in a different font than shows up here. See the section on Styles, below, to see what happened. We could use the \\* CharFormat switch to turn off the border (and the other formatting). The \! switch on this is important because it keeps the AskField from triggering and keeps the Page fields from updating when used as explained below. Before we get into that, though, I want to look at how styles are handled by the IncludeText field.

## Styles and the IncludeText Field

The way text formatted using styles is handled by the IncludeText field is similar to how it handles formatted text which is pasted into the document.

### Styles that already exist in the target document use target document style definition

If text is formatted using a style in the source document and that style exists in the target document, the style definition in the target document controls how it appears in the target document. This document (IncludeText Field Tutorial.docx) had a Body Text style already, formatted in the 11 pt. Georgia font, without any kind of border. In the source document the Body Text style is 13 pt. Garamond formatted with a purple paragraph border.

Since the style already existed here, the definition here controlled the formatting. What was brought in was that the text was formatted in the Body Text style, but the style’s definition was left in the source document and not imported.

### Styles that do not exist in the target document until imported by the IncludeText field use the source document’s style definition – sort of.

The source document has a separate paragraph, formatted in the Body Text Small style. That style was defined in the source as Body Text + 9 pt. That is, as 9 pt. Garamond text, with the purple border. Until the IncludeText field was used to import that paragraph, this (target) document had never heard of the Body Text Small style, so parts of that style’s definition were brought in. Because of the IncludeText field, this document now has a Body Text Small style. If that style is changed in the source document (to red text, say) the change will not be imported.

Finally, the source document has a paragraph formatted in the AbNormal style, which also didn’t exist in this document until brought in. That style is not based on any other style and its font is not the default font for the source document so the entire style definition comes with the text in the IncludeText field. Take a look at the [Include Text Source Document](IncludeTextSource.docx) once. You’ll see that all of the text in the original is included in a border. You might as well keep it open because you’ll want to look at its hidden page fields in a bit.

## Path names of source documents

Keeping them in the same folder is preferable, however. This is because Word doesn’t deal well with “relative” paths but usually wants everything from the drive letter down. This means if you move your document pair, you have to rewrite your links.

Paul Edstein’s tutorial shows how to write relative field paths. Those in this tutorial are all based on the assumption that the documents are in the same folder..

It is important to remember the syntax for path names for such links when the documents are not in the same folder. If I wanted to refer to the full name (with the folder path) of the document, it would be typed in sort-of web-style: “C:\\My Documents\\Word\\IncludeTextSource.docx” with double-backslashes marking folders.

To refer to a document in the same folder as the target folder, if you do not want to retype it every time the documents are moved, the following must precede the filename:

{ FileName \p }\\..\\

See Paul Edstein’s tutorial on this at [Word Fields and Relative Paths to External Files](http://www.msofficeforums.com/word/38722-word-fields-relative-paths-external-files.html).

## Using Hidden Page Fields in the Source Document for Continuous Page Numbering of documents.

The other three (hidden) bookmarks in the source document contain page number fields. Such fields can be used to continue numbering from one document to the next using a calculation field. There are three of Ctrl+ because I wanted to show three ways of hiding such fields in bookmarks.

#### Characteristics of the special bookmarked page field for continuing page numbering:

At least through Word 2021, Microsoft hasn’t thought to include a Browse feature on the Fields dialog box to make it easy to insert file names and bookmarks. Compare it to the Insert => Hyperlink command. This means you have to remember or write down the filename and bookmark name.

* It is on the last page of the document usually after all of the other text of the document.
* It is hidden *(unless you can find a way to gracefully include your page number in the text of your document).*
* It is inside a bookmark, the name of which you can remember.

So that we could show what this means, even though there is no page number displayed in our source document, and it is less than one page long, that page is page number 43! *(Look in the status bar at the bottom of the screen in the source document if you don’t believe me.)* That numbering can be continued in the footer of this document using any of the following fields:

**{** = **{** Page **}** + **{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” PageMark \! \\*CharFormat **}**  **}**

Page 52 🡨 Field is here

**{** = **{** Page **}** + **{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” AskMark \! \\*CharFormat **}**  **}**

Page 52 🡨 Field is here

**{** = **{** Page **}** + **{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” FrameMark \! \\*CharFormat **}**  **}**

Page 52 🡨 Field is here

These fields are identical except that they use different source bookmarks. All bookmarks contain a simple Page field. All are hidden.

### Hiding bookmarks by formatting Ctrl+ as hidden text.

The bookmark PageMark is formatted as hidden text (actually using a character style that includes hidden plus color and a font change). Since I often put suggestions or preparation hints in my templates and documents using hidden text (and want the typist to be able to see those hints) I looked for another way to hide text in a bookmark. I recalled how annoyed I was when I first started using the ASK field – because I could never find my answers!

### Hiding bookmarks using an ASK field.

If you use the ASK field it will put the answer to the question asked in a bookmark that you can’t see! The bookmark is right at the end of the ASK field. Normally, people use the answer by copying the text with a REF field. Here, the ASK field is inserted using the Fields dialog box (it is in the MailMerge category). It really doesn’t matter what the question is. What does matter is that you name your bookmark. I also use a default text switch of “Page.” After you OK your way out of the dialog box, your question will pop up. It doesn’t matter what your answer is, because we’ll have to edit the field anyway, to turn our “Page” into a Page field. After the question box has closed press Alt-F9 to show field codes. Find your Ask field and select the word “Page,” press Ctrl-F9 and F9 to turn it into a field and update it. Press Alt-F9 again to hide the field codes. Finally, press F9 one more time. This time, the suggested answer will be the page number. Click OK to close the box. If you press Alt-F9 again, you won’t see anything different, but there is something different – the Page field is inside the bookmark at the end of the field. You just put it there by clicking on OK.

Here’s what the Ask Field in our Source document looks like:

{ ASK AskMark "Question" \d { Page } }

If you turn on the display of bookmarks you’ll see what looks like an I-Beam cursor right before (almost on top of) the last field code brace. You won’t see what is inside that bookmark, though.

### Hiding bookmarks using hidden text inside a frame.

Finally, I got to thinking about those pesky page numbers inserted using Insert 🡪Page Number. I could never figure out how to get rid of Ctrl+! Maybe that would be a way to put in a field that wouldn’t be deleted easily. It turns out that it is. Page numbers inserted from the Insert menu are put into the header/footer of a document in frames. They are pesky because unless you click on a frame, you don’t even realize it is there. If they are outside of the margin, they don’t change the text flow.

So, I inserted a small text box in the margin of my last page. Then I copied my hidden page field into the text box. Finally, I converted the text box to a frame. You do this by right-clicking on the edge of the text box (when you have the crossed-arrow pointer) and selecting format text box. Then click on the text box tab and click on the button to convert it to a frame. Finally, when it is a frame, right-click on its border and select Borders. Get rid of the border.

Whew…

Well that is three ways to hide a page field and how doing so can help you combine documents. Which method you want to use depends on your comfort level. They are all somewhat complicated and all can be deleted by accident. Formatting as hidden text is probably simplest.

## Headers and Footers in the Source Document – Weird!

### General rule – headers and footers are not included – even with the entire document.

If you open the source document, you will note that it has a header and a footer. They don’t show up here in this document even though one of the IncludeText fields inserted the entire document! If your IncludeText field is inserted after you have any text in your document, it will not pick up headers or footers in the source.

### IncludeText field is first text in document – headers and footers imported – but not as part of the field!

**The following gets weird**. I’ve tested this only in Word 2000 and later but expect that it is true in Word 97 as well. It is true through Word 2021. If you open a new document and the first thing you do is insert an IncludeText field, the header and footer from the source will be imported into your document. That header and footer are imported as text, not as part of the field. If you immediately delete the field, even without ever displaying the field results, the header and footer will stay in your target document!

### Insert File without link – no field – in blank document – still pulls in some header/footer information – but not the text!

If you instead Insert the document, not as a link, into a new document (without any text), it will bring in the information that there is a header / footer but will not bring in the text. How do I know? Because my blank document does not have a header or footer but it does have header / footer styles defined which have a bottom border for the header and a top border for the footer. These borders don’t show up unless there actually is a header or footer. When I import a document that has a header / footer, the borders are activated in the target document, even though there is no header / footer text!

Try it for yourself using the source document provided with this tutorial! I have also included a blank document which has my header/footer formatting so you can test that effect for yourself if you want.

### Bookmarks in Headers and Footers in Source Can Be Used if Needed

The header and footer in the source document, which don’t show up in our IncludeText field for the entire document, are each in bookmarks of their own. Those bookmark names are SourceHeader and SourceFooter. Let’s see what happens with an IncludeText field for those bookmarks.

**{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” SourceHeader **}**

Header in the document IncludeTextSource.docx. This is bookmarked as SourceHeader.

**{** IncludeText “{ FileName \p }\\..\\IncludeTextSource.docx” SourceFooter **}**

Footer in document IncludeTextSource.docx. This is Bookmarked as SourceFooter.

Note that since the paragraph mark at the end of the text was not included in the bookmark, the header and footer styles are not reflected in the text formatting. Those are paragraph styles so that style information is kept in the paragraph mark rather than with the text. If you like, try splitting each of the header/footer lines into two paragraphs (one for each sentence) in the source document. You probably will be surprised by the formatting results when you update the fields above! (You have to save the source document first, though.)

## What if the field says “Invalid FileName?”

This means you have not used the full document path required since Word 2007. See Paul Edstein’s tutorial on this at [Word Fields and Relative Paths to External Files](http://www.msofficeforums.com/word/38722-word-fields-relative-paths-external-files.html).

In this tutorial, the fields are set as *relative* using the suggestions in that tutorial. The following is inserted prior to the filename (inside the quotation marks) in each field.

{ FileName \p }\\..\\

The FileName is a nested field. For this document it gives the text result:

E:\Dropbox\MS System Files\\_Word 2016\Utilities and Downloads on My Website\IncludeText\IncludeText Field Tutorial.docx\\..\\

That text works fine with both files in this folder, it does not work if the folder is moved, though. The nested FileName field works if the folder is moved so long as the relative positions remain the same.

## For another Tutorial – Tables of Contents and RD fields

You may have noticed that the Table of Contents here did not include the continuous page numbers. That’s a subject for another tutorial. The field involved is the RD (reference document) field and there is information on the [MVP FAQ](http://www.mvps.org/word) site about it.

# Updates and other Free Downloads – Write the Author

This tutorial consists of two documents, neither of which contains macros. There is also a version for earlier versions of Word and a blank document to show how headers/footers work. This is distributed in zipped format as freeware. It may be distributed unmodified, in the zipped format, without further permission. I would love donations to support my habit of solving Word problems when I should be doing something to earn a living.

Updates (if any) will be listed at <URL: <http://www.addbalance.com/word/download/index.htm>> as any are made available.

Other free downloads, tutorials and utilities may also be found there.

Among other free items available are:

* Gender toolbar – tired of his/her conundrums?
* Legal Toolbars
* Check Box Addin
* ASK field tutorial

Charles Kyle Kenyon

* Letterhead system and Letterhead Tutorials
* Links to other Word download pages

<http://www.addbalance.com/word/download/index.htm>.

[Microsoft Word New Users Frequently Asked Questions (FAQ) and Web Resources](http://www.addbalance.com/word/index.htm)

[Intermediate Users' Guide to Microsoft Word - for production of complex documents](http://www.addbalance.com/usersguide/index.htm)

[Templates in Microsoft Word](http://www.addbalance.com/usersguide/templates.htm)

Please write with any comments or questions. I don’t promise to answer quickly because I do have to try to earn a living. I do promise to read your message, though and really do appreciate comments, even those that point out problems in my tutorials.

email: [IncludeTexttutor@addbalance.com](mailto:%20includetexttutor@addbalance.com)

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