AutoCrat Users Guide

Version 3.0.0.beta

Welcome to the new AutoCrat, which we are referring to as 3.0.
This new version improves a number of issues around usability and trigger performance.

To report a new bug, please head to the Autocrat Google Group.

Contents

About the new AutoCrat

The main changes and additions include:

1. A single user interface. We got rid of the sidebar. Everything happens through the primary dialogue. Hopefully this simplifies everything and improves performance.
2. More modern design/interface.
3. Cleaner code under the hood. We have grown a lot as developers and our code is far more performant. Hopefully this will be immediately apparent.
4. Single document mode. You can now produce a single document for a merge job. E.g. a single doc or PDF, with each row of data that meets your job criteria merged into it ([see step 4](#)). Optionally you can add page breaks between. Previously you could only create one document per row of data. This was one of the most asked for feature requests. *NOTE: This only works for docs at the moment, not spreadsheets*.
5. During the template/tag mapping process, you can now select a tag type ([see step 3](#)). The current types are hyperlink and image.
    a. Image merge. You can now merge images into your docs from a publicly hosted image URL. Select a tag type of image and optionally provide AutoCrat with a height and width (in either pixels or as a percentage). Unfortunately, it doesn't seem like google allows you to set word wrap on an image programmatically. So all images must be merged in-line.
    b. Hyperlink merge. This has secretly existed for a while in v2.0, but it was finicky and only worked some of the time. Hopefully it's better now.

About the upgrade process

*   You can choose to upgrade early by clicking the "Upgrade to AutoCrat v3" link in the bottom of the v2 sidebar.
*   All of your old jobs can be imported into the new version after the upgrade has completed for your account.
    *   NOTE: Upgrading your account does NOT mean that your jobs have been upgraded. This means that existing jobs that have not been explicitly imported

into v3 will remain in v2 indefinitely. However, once you upgrade your account you will not be able to view/edit/manually run your v2 jobs without importing them into v3.
● If one user of a spreadsheet has upgraded to v3, all other collaborators on that spreadsheet will see v3 when they open AutoCrat *in that spreadsheet*.

The Development Roadmap

Here are the things we're currently working on (sort of, but not necessarily in this order):
1. if merge sheet does not have headers, prompt user to drop tags in as headers
2. Detect whether a form submission is a new submission vs a re-submission and if so, re-run the merge.
   a. Need to figure out a workflow around whether a new merge doc is created and the old one is preserved OR the same doc is emptied and re-merged
3. Allow single output mode to be run for spreadsheets
   a. This is actually pretty tricky. For a doc, I'm just copying the body of the template and pasting it over and over again into the output. But for a spreadsheet, if the template has multiple tabs, what exactly am I copying?
4. Allow user to capture edit form URL on form submissions.
5. Google Slide Templates!
6. Better support for multiple languages

Known Bugs & Issues

To report a new bug, please use the [AutoCrat G+ Community](#). Note that you are using v3.

1. In the "Share docs & send emails" step, the "share doc as" menu will show "editable doc" and will be disabled so you can't change it, even though the doc type in step 4 is PDF. This is only an issue in the interface. The shared doc will still be shared as a PDF.
2. Large Files in Single Doc Merge Mode - If you have lots of rows, this may end up creating more than one doc. It will merge as many rows into a single doc as it can before hitting a Google imposed time limit of 6 minutes. It will then start over with a new doc. We are working on resolving this.
3. Copying the header tags from [the drawer menu](#) to the clipboard does not work in Safari
4. <<Image>> tags in your template will not work if they are on the same line as other text. So if you have an image of a digital signature, and you have a <<Signature>> tag, you can't put "Signature: <<Signature>>" on the same line. You would need to put

   Signature:
   <<Signature>>
5. In some cases, a trigger set by one user cannot be removed so that a second user can become the "trigger owner"

AutoCrat Users Guide

Getting Started

Welcome to the new AutoCrat! AutoCrat is a basic document merge utility that allows you to take data from a spreadsheet and paste (or merge) it into a document. Documents can be Google docs or spreadsheets, or even PDFs.

Each spreadsheet will be referred to as a "project". Each project can have one or more "jobs". A job is a set of instructions telling AutoCrat what to do. When you run a job, a new merge is created.

Start AutoCrat by clicking "Open" from the AutoCrat menu under Add-ons in your spreadsheet. Click the new job button, and follow the instructions in the setup wizard. Click next to progress to the next step, and click save when you are finished. Not all steps are required. If you failed to set any settings that are required, AutoCrat will tell you.

Creating or selecting a template

AutoCrat requires a template. (Click here to view a sample). This is how it knows what your final document or documents should look like. A template can be either a Google document or Google spreadsheet. Put <<tags>> in your template everywhere you want to dynamically pull in data from your spreadsheet. Format your template however you like!

Tags

Tags look like this: <<I am a tag>>. They are a string of text wrapped in double less than and double greater than symbols. During the job setup process, you will need to map each tag found in your template to a column in your spreadsheet. If you make the tag text match a spreadsheet column exactly, AutoCrat will find it and auto map it for you. Beware, tags are case sensitive!

Using data from your merge sheet in your settings

What if you want each document that AutoCrat creates to have a different file name? Well you can do this by using <<tags>> in the file naming convention setup step. For example, say you have a "Student Name" column in your spreadsheet. Simply put "<<Student Name>> - Bio Assignment 1" in the file name field to give each file a helpful and unique name.

Almost all of the text fields in the AutoCrat3 job settings can pull data dynamically from your merge sheet.

A note on upgrading from v2 to v3: In version 2 of AutoCrat we used the syntax $iAmAHeader for each of the settings fields like email address, file name, etc. We are now using the new <<I Am A Header>> syntax because this is one fewer convention to remember AND it is the same as how we do things in our other Add-on formMule. However, your $iAmAHeader tags should still work with the new AutoCrat. You should not need to change them from $ to <<>> when you upgrade.

To make adding columns easier, there is a drawer panel on the left side of any settings step that allows for these dynamic fields. Open the drawer by clicking the little triangle and click a column header to copy it to your clipboard with the <<tags>> already wrapped around it.

As a bonus, you can use <<TODAY>> to add today's date (formatted in your local convention) and <<NOW>> to add your local Date + Time. So for example, "<<Student Name>> - Bio Assignment 1 [Created on <<NOW>>]".

Creating or Editing a Merge Job

When you click the "New Job" button OR the little pencil icon on an existing job, the job editor wizard will open. This is where you will enter or edit all of AutoCrat's settings for a particular job.

1. Name your merge job

Give your job a useful name so that and your collaborators can easily recognize it.

2. Choose template

Choose a template that you have previously created. You can either pick from your Drive or choose a recently selected template from the list at the bottom of this step.

3. Map Source Data to Template

When setting up your merge you will need to "map" (i.e. match) the tags in your document template to the columns in your spreadsheet. If the tags match their corresponding header exactly, the mapping will be done for you automatically. But they do not need to match, in which case you must manually match them.

AutoCrat 3.0 now provides the ability to indicate the type of data that is being merged:

> **Standard**: a normal text field. Will be merged into the document exactly as it appears in the spreadsheet. Same as AutoCrat v2
>
> **Image**: Autocrat can now pull an image URL from a sheet and merge the image (not the URL) into the document.
> - The image must be publicly hosted. Images stored in Drive will not work.
> - You can optionally provide a width in pixels (e.g. 50 or 50 px) or percentage (e.g. 50%). Pixels are an absolute size, whereas the percentage is relative to the actual image file's size. Leaving these fields blank will simply merge the image at 100% of its actual size.
>
> **Hyperlink**: Autocrat can identify text as a URL so that it is live (clickable) in the document. When selecting this option you will also be able to include a "link label". Use this option if you wish to hide the URL behind a word or sentence.
> - With a Link Label: Click to View (i.e. the link label is "click to view" to which the hyperlink "www.google.com" is applied)
> - Without a Link Label: www.google.com

4. File Settings

File Name

This is the name that each merged document will be given. Use <<tags>> that match a column header to make the names unique. Use <<NOW>> or <<TODAY>> to give each doc a timestamp.

File Type

Either Google Document or PDF. Note that some hyperlinks may not work correctly if exported directly to PDF. As a work around, save as a Google Doc and export to PDF manually afterwards.

Output as

Multiple Output: Choose to output one document per row of data that satisfies your merge. Single Output: create one document (new!) with each row merged into the same document.

A note on single document mode: On very large jobs you may end up with 2 or 3 separate documents. We're working on fixing this.

5. Choose destination folder(s)

Choose a folder for every merged document to be dropped into. This is actually optional IF you include a "dynamic folder reference".

6. Add dynamic folder reference (optional)

AutoCrat always provided this functionality, but it's being renamed for clarity. It was formerly referred to as a "Secondary Folder Key", which isn't super clear.

The idea is that sometimes you want a merged doc to be dropped into certain folders and not others. E.g. Say you want to create a document for each teacher at your school and organize those docs by grade team. Create a folder for each team, put the proper folder ID into a column in your data sheet, and then tell AutoCrat which column contains these "dynamic" folder references.

7. Set Merge Condition (Optional)

A merge condition tells AutoCrat whether or not to merge a particular row of data. By default, AutoCrat will run for all rows in a job's data sheet that do not have a value in the status column for that job. You can optionally add additional conditions that must be met for AutoCrat to include a row of data.

Specifically, you can tell AutoCrat to only merge a row of data IF the value for a specified column is equal to a particular value, is NULL or is NOT NULL. NULL means empty or blank, and NOT NULL means not empty or blank (i.e. it has any value at all). You should NOT include quotes around the value.

AutoCrat v2 only let you add a single condition, but AutoCrat v3 now allows for multiple.

8. Share docs & send emails

Currently, if you want to share a merged document with others, you must also send them an email. The merged document will be shared with each email recipient. You can optionally prevent editors from re-sharing the merged doc and/or send the email from a generic no-reply email address (e.g. no-reply@myschool.org).

9. Add/remove job triggers

Optionally tell AutoCrat to run every time a form is submitted (only works if there is a form attached to the spreadsheet. And/or to run at a given time interval (E.g. every 3 hours). Note: A limitation of Google Add-ons is that they cannot run more frequently than every hour. Check out Understanding Triggers in AutoCrat3 for further reading.
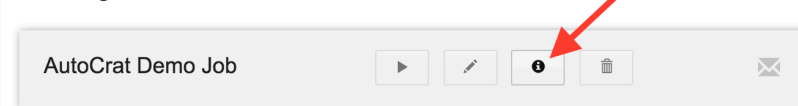
Job Details Summary

Previewing Your Job

Job Details Summary

Click on the information icon to quickly see a summary of your job settings

Note that you can see the number of rows of data that will be merged if you ran the job as is. If the number is zero you will see the message "No rows will be merged. None meet merge criteria." This means that you either have a status message in every row, or you have a merge criteria set that is not true for any rows.
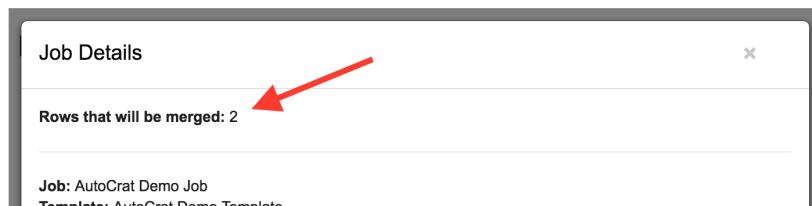
Preview for first mergable row

You can also run a test merge for the first available row of data by clicking the "Preview for first mergable row" button at the bottom of the Job Details pop up. This will run the merge for the first row of data that is eligible to merge, however it will NOT add a status message to your merge column (meaning the next time your run the actual merge, this row will be merged again). When run in preview mode, the merge will NOT send emails to the designated recipients. It will, however, send an email to the email address of the person running the preview so that you can preview it and make any desired changes before actually sending.
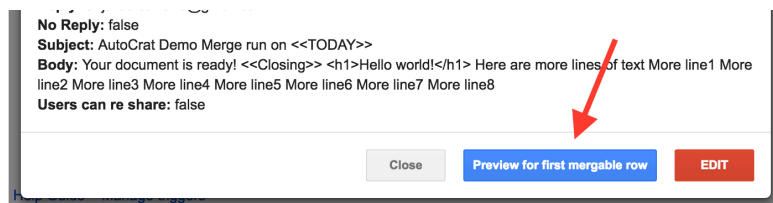
Further Reading

Where do I find my document or folder's ID?

Every Google document, spreadsheet, folder, etc. has a unique identifier that can be found in the URL for that doc - usually after the /d/. For example, the doc ID for this help guide is "1WTGSSIH6gwUHpipusPKLIsgfFUamDbFbJ7JaoG6-ZBo". AutoCrat uses these IDs to manage your merge documents, templates and destination folders.