GROW™/AssignmentPro™ Using Merge Documents

Table of Contents

Overview

This document provides instruction for creating and configuring standard merge documents in GROW™/AssignmentPro™. It also provides a list of the standard merge data sources provided with the system and details on how to use a User Report as a merge data source.

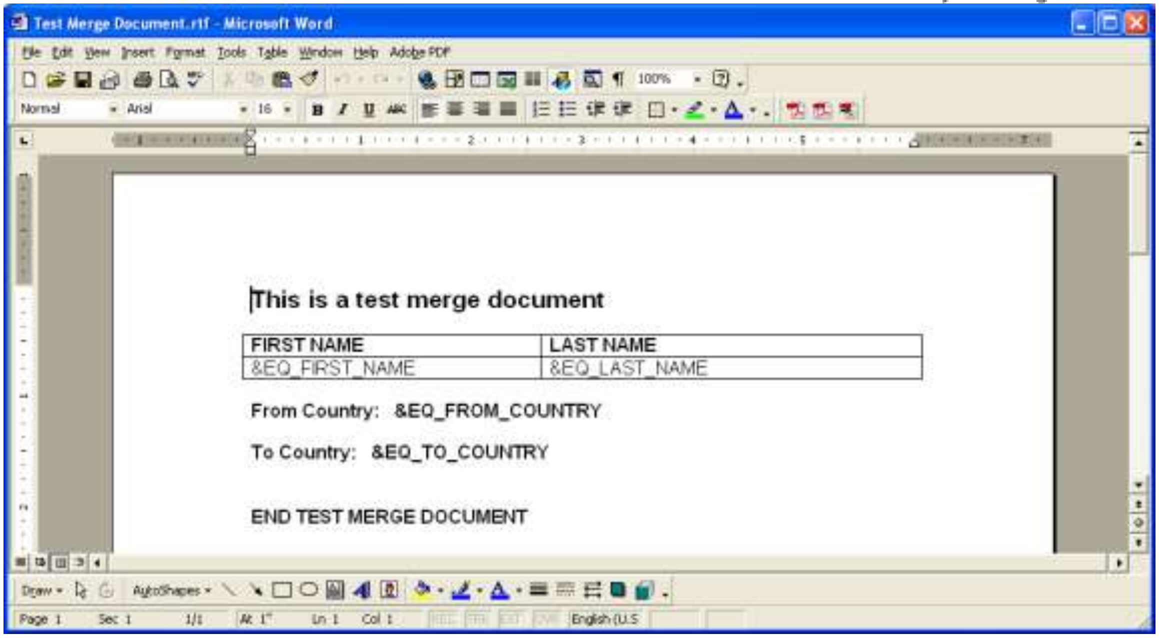
Configuring Your Merge Document

Step 1: Create a document that will contain merge data.
A document to serve as the content template (into which data will be merged) must be created. Two document formats are supported: RTF and DOC (MS Word). The means of providing placeholders for merged data differ for each document type.

If your document is an RTF:
Create an RTF merge document that contains merge tags that will be replaced with data from the merge data source stored procedure by the GROW™/AssignmentPro™ Merge Document functionality.

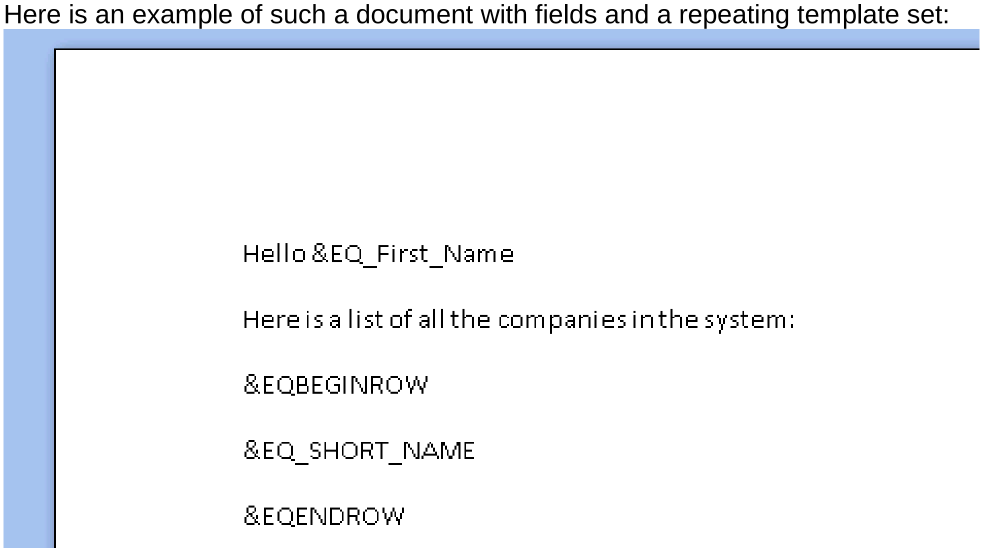
The merge tags must begin with "&EQ_" followed by the column name returned by the merge data source stored procedure. In the example below, there are four merge fields in this merge document:

1. &EQ_FIRST_NAME
2. &EQ_LAST_NAME
3. &EQ_FROM_COUNTRY
4. &EQ_TO_COUNTRY



It is possible to define a section of the document which will repeat once for each record that the stored procedure returns. You will need to signify the beginning of the repeating section by using the field &EQBEGINROW, Then enter the fields you wish to repeat and close the section with &EQENDROW

Here is an example of such a document with fields and a repeating template set:


Hello &EQ_First_Name

Here is a list of all the companies in the system:

&EQBEGINROW

&EQ_SHORT_NAME

&EQENDROW

For a more complex table structure with multiple repeating fields see the example below:

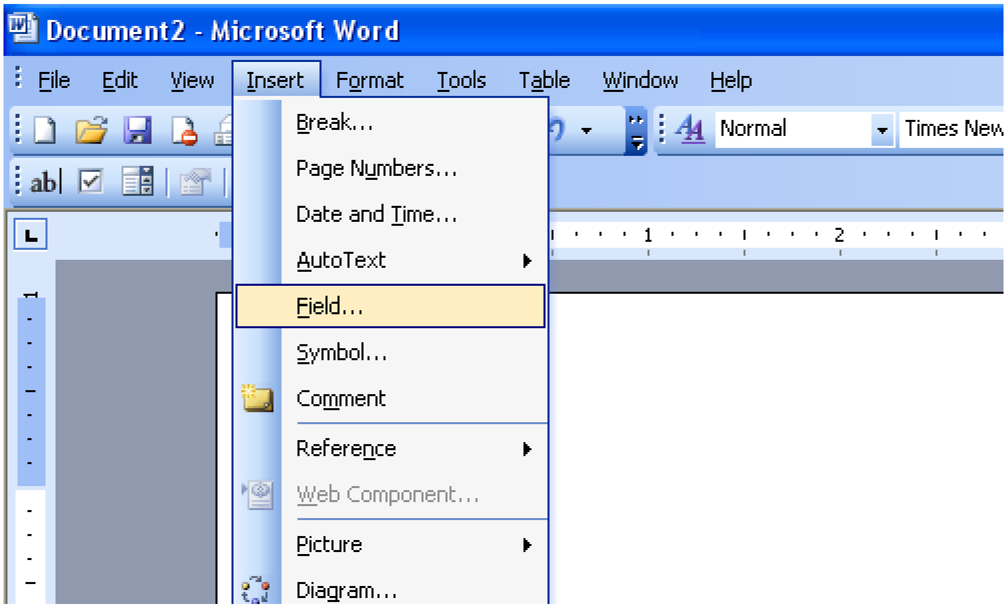
File #	Employee Name	Emp#	Charge Code	Type	Service Fee
&EQBEGINROW &EQ_ASSIGNMENT_ID	&EQ_FIRST_NAME &EQ_LAST_NAME	&EQ_TO_EMPLOYEE_ID	&EQ_ASSIGNMENT_CF_TEXT003	&EQ_ASSIGNMENT_TYPE	&EQ_RECEIVABLE_AMOUNT

&EQENDROW

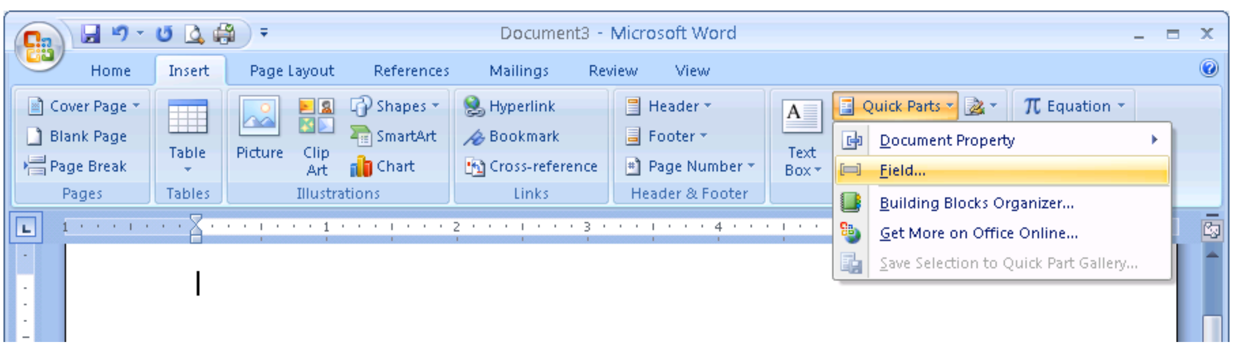
If your document is a Word .DOC:

Create a DOC merge document that contains merge tags that will be replaced with data from the merge data source stored procedure by the GROW™/AssignmentPro™ Merge Document functionality.

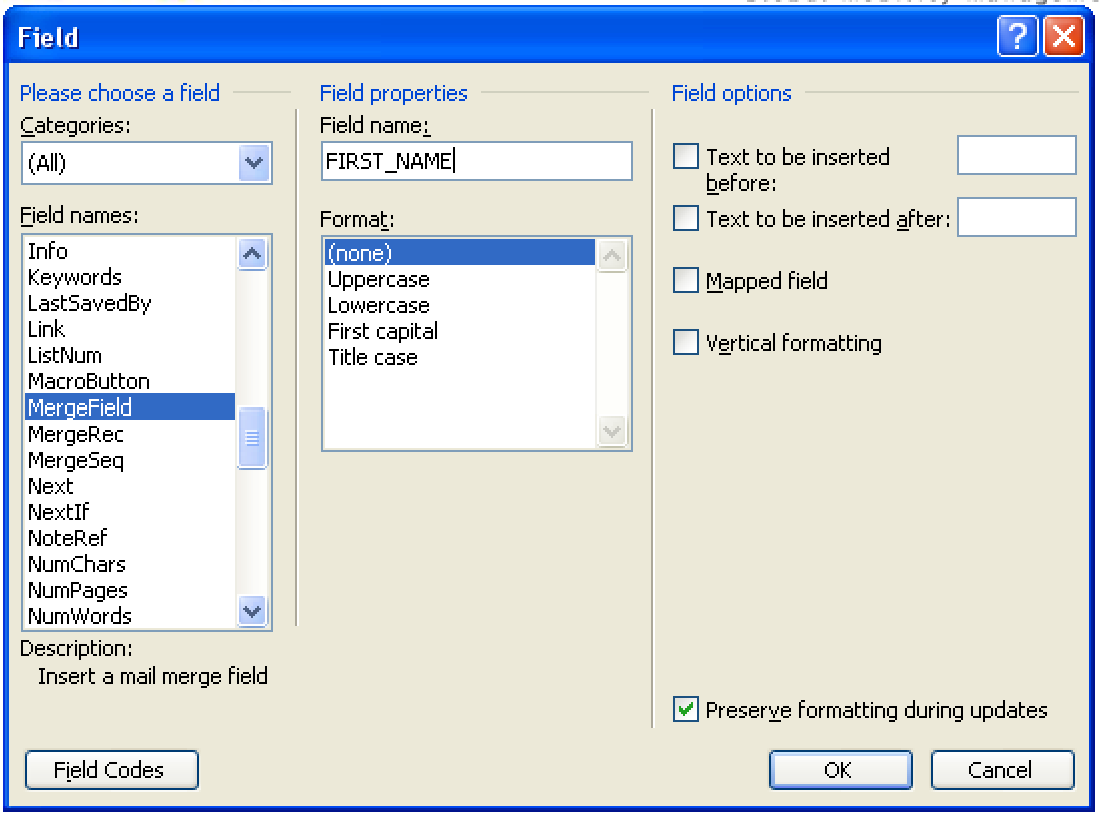
Data placeholders must be created in the document as merge fields. In Microsoft Word 2003 or earlier Select Insert->Field…



In Microsoft Word 2007 access the Insert tab and clicking Quick Parts in the Text section and select Field.

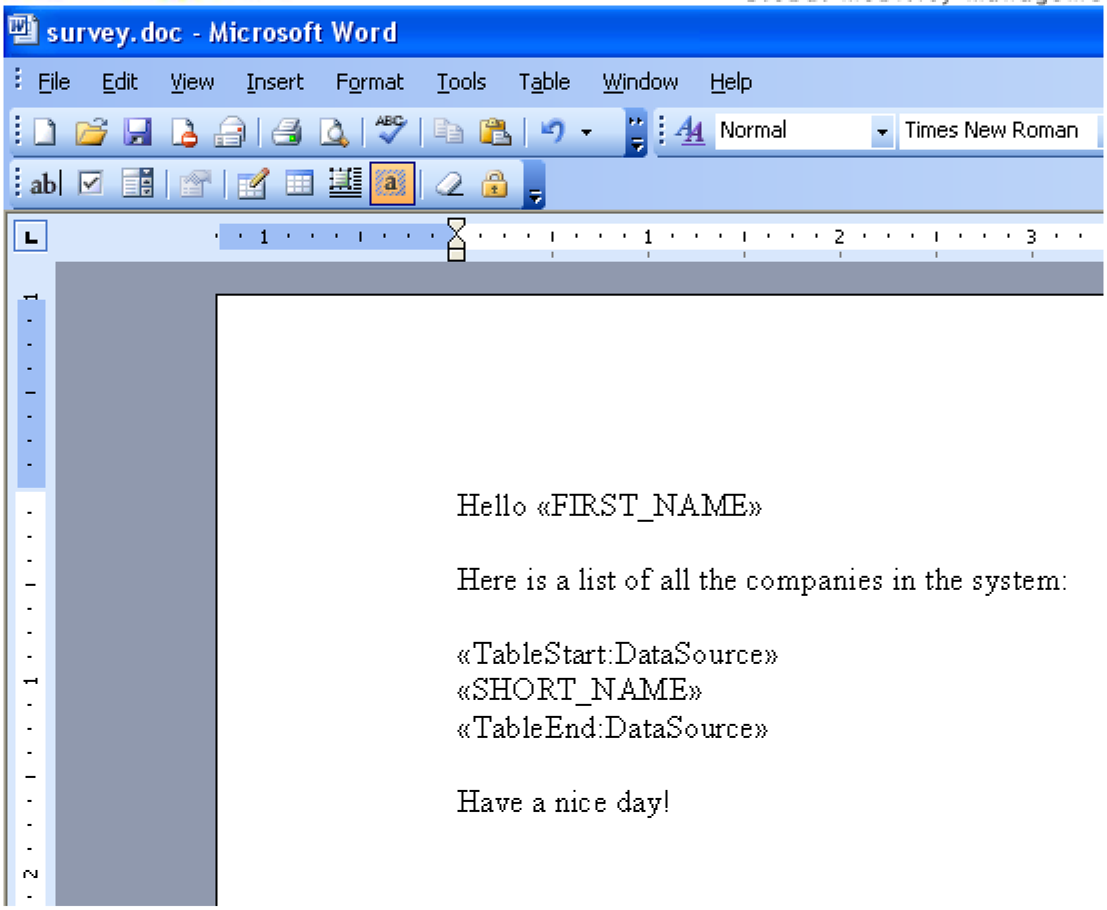


And then in the popup, select "MergeField" from the list on the left. In the middle panel, for "Field name:" enter the name of the data column that will be returned by the stored procedure. Do not include the &EQ_ prefix because it will not work.



As with RTF merges, it is possible to define a section of the document which will repeat once for each record that the stored procedure returns. In the case of Word documents, however, there can be more than one such section in the document. To create such a section, create a merge field just as above, but name the field: “TableStart:DataSource”. This field marks the beginning of the section. Mark the end of the section with another merge field named “TableEnd:DataSource.”

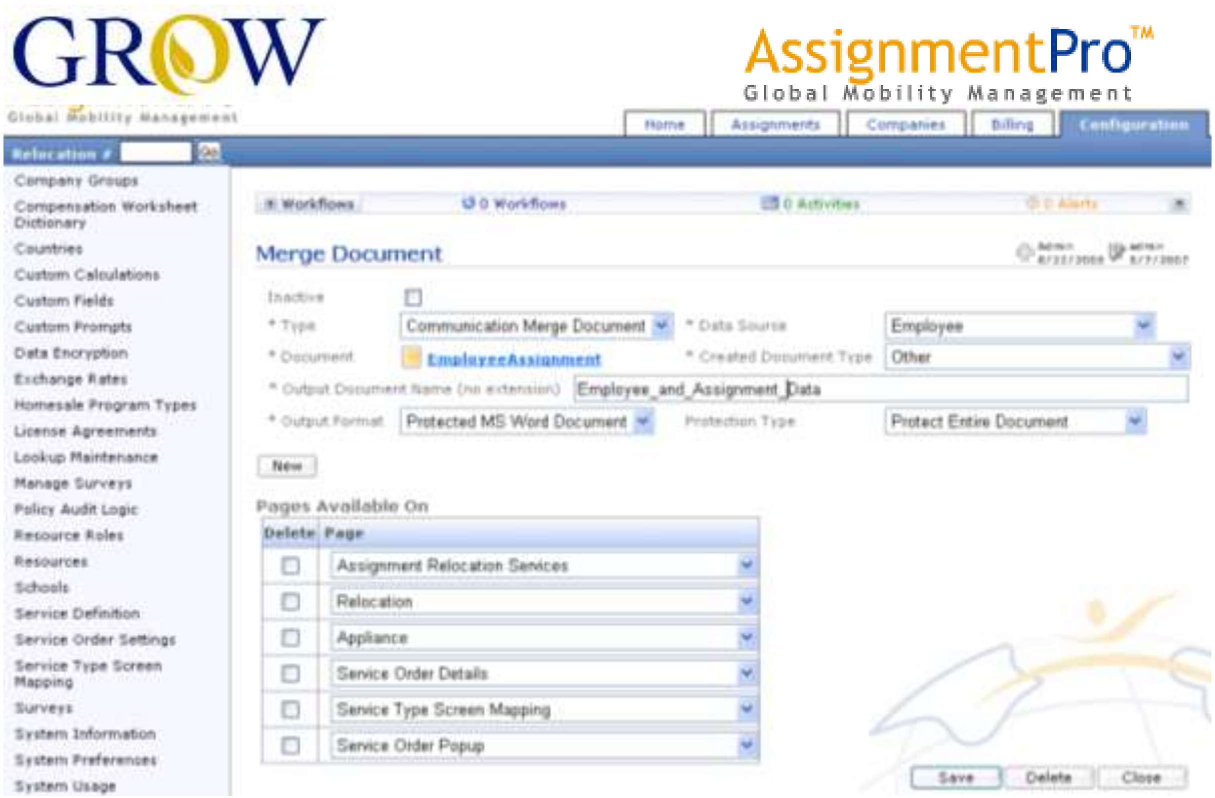
Here is an example of such a document with fields and a repeating template set:



Step 2: Upload document into the system.
Upload the RTF or DOC into GROW™/AssignmentPro™ via the Merge Document screen on the ***Configuration*** menu.

a) You will need to specify the **Type** as a Communication Merge Document, Service Order Merge Document or Billing Invoice. The type of merge document you select will determine what data and where the document can be placed.
b) Specify the **Data Source**. Select either a System Standard Data Source from the **Data Source** list or select the **User Report** radio button and select the User Report that you will use as the data source for this document. See the Using a User Report as a Merge Data Source section for details about this option.
c) Click on the **Upload File Icon** to browse to and upload your saved merge document.
d) Specify the **Created Document Type**.
e) Enter a value for the **Document Name**, do not include the extension.
f) Specify the **Output Format**, this will be the format of the document once the data is merged, select Protected MS Word Document, MS Word Document, or PDF Document.
g) If you select Protected MS Word Document you will need to specify the **Protection Type**.
h) When done **Save** your work.

Note that if the uploaded merge document is already a protected Word document, and the selected output format is "Protected MS Word Document," then the password in the original document will be re-used to protect the final output document. If the uploaded merge document is not protected, a random password will be created and used in the final output.



Step 3: Add Pages Available On

You will need to specify what page(s) you want this merge document to be available on. To add a page click on the **New** button above that section. Select the page you want it to appear on from the **Page** dropdown. To add additional pages do the same process again starting with the **New** button. It is now possible to select this merge document when entering a note/communication of type “Email Attachment” from the selected pages. Data from the dataset will be merged into the document, which will then be sent to the email target (and also made available to preview prior to sending).

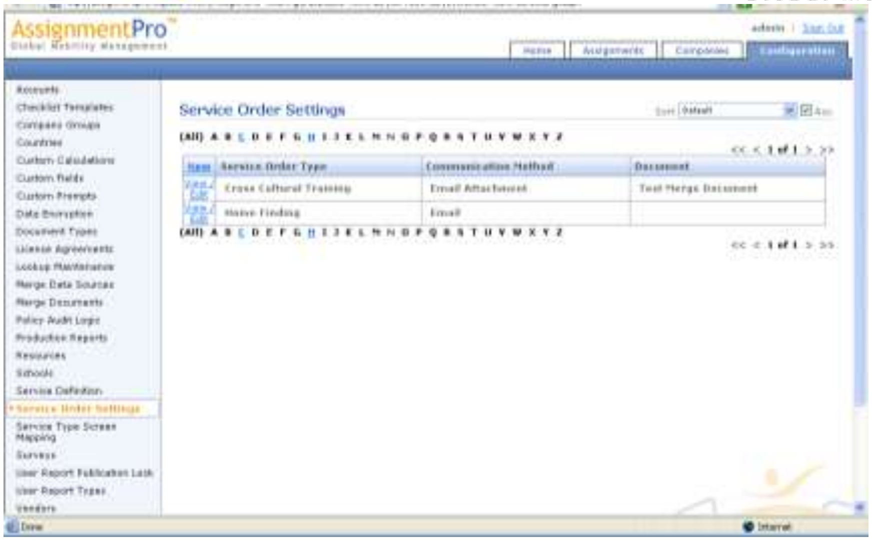
Merge Tags in Emails

Data can be merged into Service Order communication emails.

Step 1: Service Order Settings

Go to the Service Order Settings screen and either create a new or edit the existing record.

Example:

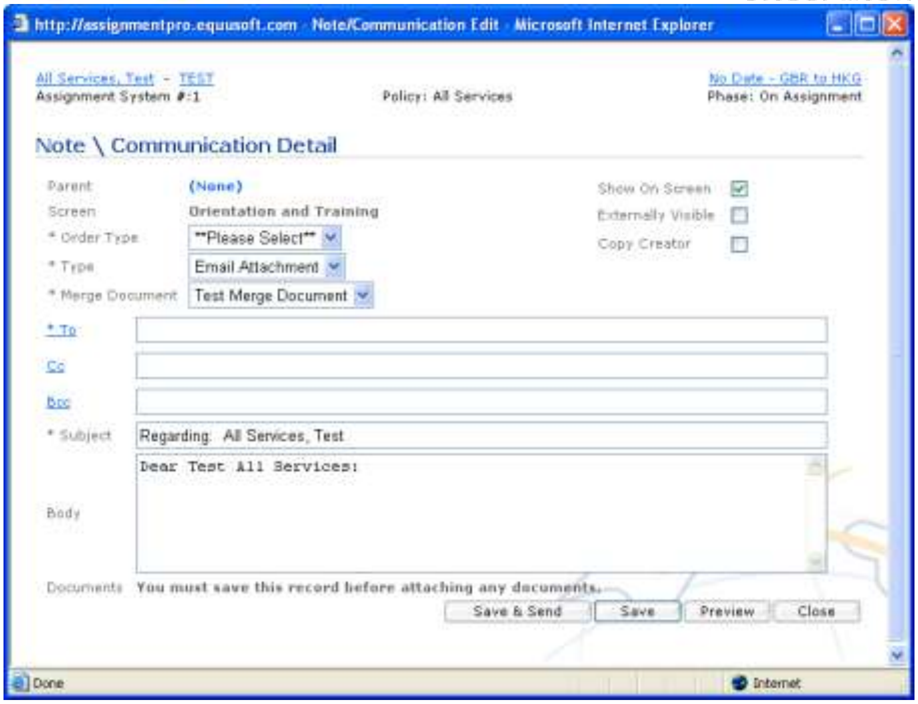


Step 2: Selecting an Email Merge Data Source
Pick an Email Merge Data Source and put merge tags in the default email Subject and Body fields.

Example:

Step 3: Create a New Communication
Click New Communication on a service order, the merge tags are replaced by data from the merge data source stored procedure.

Example:



Equus Standard Merge Data Sources

There are several standard merge data source stored procedures included with AssignmentPro/GROW.

MERGE DATA SOURCE NAME	STORED PROCEDURE NAME	DESCRIPTION
Employee	EQ_STANDARD_MERGE_EMPLOYEE	Returns selected fields regarding Employee and Assignment data for a specified AssignmentID.
Generic Service Order	EQ_STANDARD_MERGE_DOCUMENT_SERVICE_ORDER	Returns selected fields regarding Company, Employee, Assignment, Service Order, and Mailing Address, Employee Contact and Dependent data for a specified ServiceOrderID.
Temp Living Service Order	EQ_STANDARD_MERGE_DOCUMENT_TEMP_LIVING	Returns selected fields regarding Company, Employee, Assignment, Service Order, and Mailing Address, Employee Contact, Dependent, and Temp Living data for a specified ServiceOrderID.
Move Management Service Order	EQ_STANDARD_MERGE_DOCUMENT_HHG	Returns selected fields regarding Company, Employee, Assignment, Service Order, and Mailing Address, Employee Contact, Dependent, and Move Management data for a specified ServiceOrderID.
Employee Listing Service Order	EQ_STANDARD_MERGE_DOCUMENT_EMPLOYEE_LISTING	Returns selected fields regarding Company, Employee, Assignment, Service Order, and Mailing Address, Employee Contact, Dependent, and Employee Listing data for a specified ServiceOrderID.
Destination Buyer Service Order	EQ_STANDARD_MERGE_DOCUMENT_DESTINATION_BUYER	Returns selected fields regarding Company, Employee, Assignment, Service Order, and Mailing Address, Employee Contact, Dependent, and Destination Buyer data for a specified ServiceOrderID.
Employee Expanded	EQ_STANDARD_MERGE_DOCUMENT_EMPLOYEE_EXPANDED	An Expanded Set of General Employee and Assignment Information for a specified AssignmentID.
Invoice	EQ_STANDARD_MERGE_DOCUMENT_INVOICE	Data for Invoices

Using a User Report as Merge Data Source

You have the option of using a User Report as a Merge Data Source this gives you the flexibility to create Merge Letters with any information that you have configured a user report to have. There are a couple necessary guidelines:

The user report will need to contain fields for the necessary level of detail you will use it for. For example if you want to use the report as a merge data source for an assignment communication you will need to include the Assignment ID and add it as a filter. You can set the filter to any value but set it to prompt. This will allow the system to pull the Assignment ID from the record you are adding a communication to. See an example below.

Filters

Admin 9/30/2009 Admin 9/30/2009

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Assignment: ID	Is Equal To	1			Yes

If you want to use the report as a merge data source for a Service Order email or communication you will need to include the Service Order ID and add it as a filter. You can set the filter to any value but set it to prompt. This will allow the system to pull the Service Order ID from the record you are adding a communication to. See an example below.

Filters

Admin 9/30/2009 Admin 9/30/2009

Edit Filters

Filters

Order	( )	Field	Comparison	Comparison Value	( )	And/Or	Prompt
1		Service Order: ID	Is Equal To	1			Yes

You will need to make sure that all of the fields contained on your report have unique captions. These captions are what you will use as your merge fields in your document. If you plan on using the fields in an rtf document or directly in Service Order emails you will want to make the captions without spaces. If you need further information on creating the user report please see the User Report Manual. Once you have the report created with the filters in place you will be able to use the report as a merge data source by selecting the User Report data source option on the Merge Document configuration screen.

Using a Merge Document for a Billing Invoice

You can configure a merge document for a billing invoice by using one of the Standard Merge Data Sources. Currently you can only use rtf and it will output in rtf format. Billing invoice merge documents cannot use the user report data source method.

