



**TaskCentre® v4.5
Merge MS Word Document Tool
White Paper**

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Introduction

Overview

The '**Merge MS Word Document**' is a Format Tool which is used to create a Task Step that produces single or multiple HTML documents, primarily utilising information provided by Input Steps such as the Database Query (ODBC). You may create new HTML pages within the interface or import pages that have already been created elsewhere. The Step uses merge fields to merge data objects into the document and/or insert tabulated data from a source to produce dynamic documents such as order acknowledgements, statements, intranet or web site content or summary reports. These HTML documents can then be delivered using many of the Output Steps such as Send Message (SMTP), File Transfer (FTP) and Save to File.

The HTML Table functionality is extremely flexible allowing presentation of the data in exactly the form required. Tables support grouping, sub totals, grand totals, data formatting and ultimately flexible hyperlink support for common hyperlink types to enable drill-down/through to other content or custom protocols to automate applications. Use your default third-party HTML editor such as Microsoft Expression Studio or Adobe Dreamweaver in conjunction with TaskCentre by simply using the 'Edit' button.

Features

- Drag-drop table builder
- Flexible Data formatting
- Flexible Hyperlink Support
- Auto Hyperlink detection for dynamic data
- Flexible formatting of fonts, borders, colours, backgrounds
- Sub totals & Grand total
- Flexible total labelling & positioning

Technical Summary

Working with other Steps

The other Steps that the Merge MS Word Document Step will interact directly with, whether by exposing information to it or consuming information from it are listed below.

Step Icon	Name	Step Type
	Schedule	Event Step
	MS SQL Server Trigger	Event Step
	Oracle Trigger	Event Step
	SMTP	Event Step
	Workflow Job Submission	Event Step
	Database Query (ODBC)	Input Step
	Database Query (OLEDB)	Input Step
	Call Procedure (OLEDB)	Input Step
	Data Filter	General Step
	Text Parser	General Step
	Decision	General Step
	Create Workflow Job	Format Step
	XML to Recordset	Format Step
	Send Message (SMTP)	Output Step
	Save as File	Output Step
	File Transfer (FTP)	Output Step
	Send Fax (M:Science)	Output Step
	Call Procedure	Output Step
	Call COM Object	Execute Step
	Call Procedure	Execute Step

Dependencies

The products, technologies, protocols or systems that are required for the Merge MS Word Document Step to work are listed below.

Objects Consumed

Objects that the Merge MS Word Document Step consumes that are exposed by other Steps are listed below.

Objects Exposed

Objects that the Merge MS Word Document Step exposes, that can be utilised by other Steps are listed below.

Configuration

The Merge MS Word Document Step is configured through the Merge MS Word Document dialog which is the main interface for creating a new Step. It is used to create a single or multiple Word, XML, HTML, RTF or plain text documents from an imported Word document or template containing mail merge fields. Either the existing document data source can be used or data from TaskCentre can be mapped to mail merge fields and can then be added to the document by simply dragging and dropping them into the required field from the Task Browser dialog. The Merge MS Word Document dialog is displayed through the methods described below.

To create a new Step:

To open an existing Step:

The dialog contains the five tabbed panes described below through which a Merge MS Word Document Step may be created and configured.

General

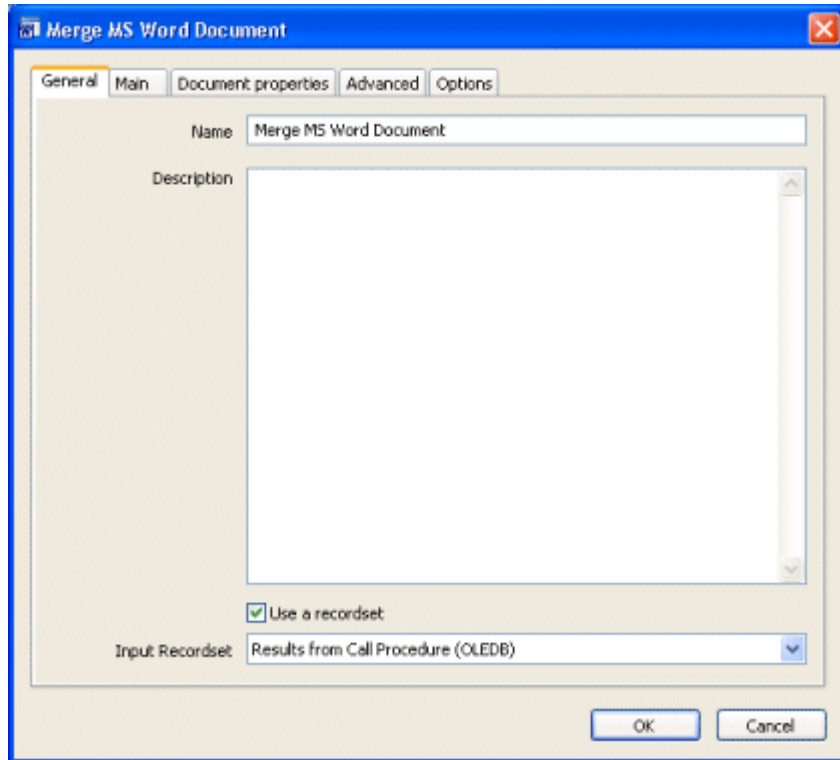


Figure 1. Merge MS Word Document – General tab.

The contents of the **General** tab (Ref: Figure 1) are as follows:

Main

The **Main** tab (Ref: Figure 2) importing a Word document or template containing mail merge fields. The mail merge fields can then either remain mapped to their original document data source or TaskCentre data from the Task Browser dialog can be dragged and dropped against specific fields.

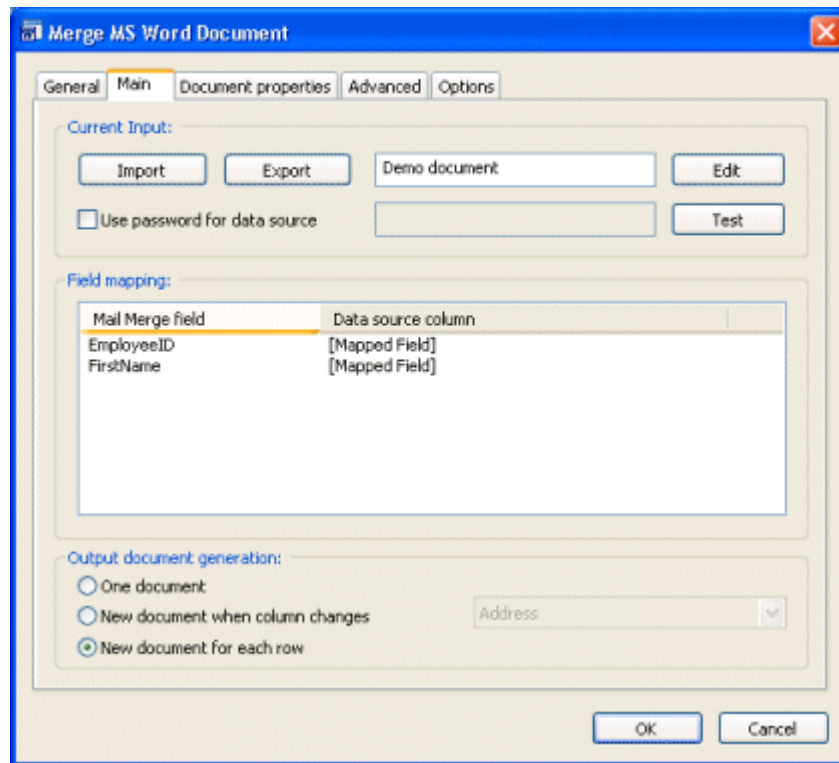


Figure 2. Merge MS Word Document – Main tab.

The tab contains the following:

- **'Import'** (button) – Displays a standard file browser dialog to enable a MS Word document or template file to be selected for importing into the TaskCentre database.
- **'Export'** (button) – Displays a standard file browser dialog to enable the imported MS Word document or template file to be exported from the TaskCentre database to another location and saved as a file.
- **'File Name'** (field) – Regardless of the existing name of the file being imported, another name can be specified by manually entering it into the field.
- **'Edit'** (button) – Opens the document in the MS Word application to enable it to be edited. After editing the existing document version in the TaskCentre database is overwritten with the new version when it is saved.
- **'Use password for data source'** (option check box) – If checked then the 'Password' field is activated.
- **'Password'** (field) – With the 'Use password for data source' check box selected, the password required to access the original data source at task run time may be manually entered.
- **'Test'** (button) – Tests the original document mail merge data source connection using where applicable the password entered in the 'Password' field. A pop-up dialog displays the results of the test.
- **Mail Merge field** – Displays the mail merge field name.
- **Data source column** – Displays '[Mapped Field]' where the Tool recognises that the field is correctly mapped to the mail merge data source. The column row will be blank where no mail

merge field is mapped. TaskCentre data may be dragged and dropped from the Task Browser dialog into a column row against any mapped or unmapped mail merge field.

- **One document** – Only one document is produced when the Step is run.
- **New document when column changes** – This option is used in conjunction with the 'Column' drop down list to generate a document when the selected column changes.
- **'Column'** drop down list - When an input recordset has been previously selected in the 'General' tab, the available columns are displayed in a drop down list for selection.
- **New document for each row** - A new document is generated for each row in the recordset.

Document Properties

The '**Document Properties**' tab (Ref: Figure 3) allows users to specify the document properties, either manually or dynamically at Task run time by dragging and dropping objects into the appropriate field from the Task Browser dialog.

The tab contains the following:

- Title
- Subject
- Author
- Manager
- Company
- Category
- Keywords
- Comments
- Hyperlink base
- Template (not editable)

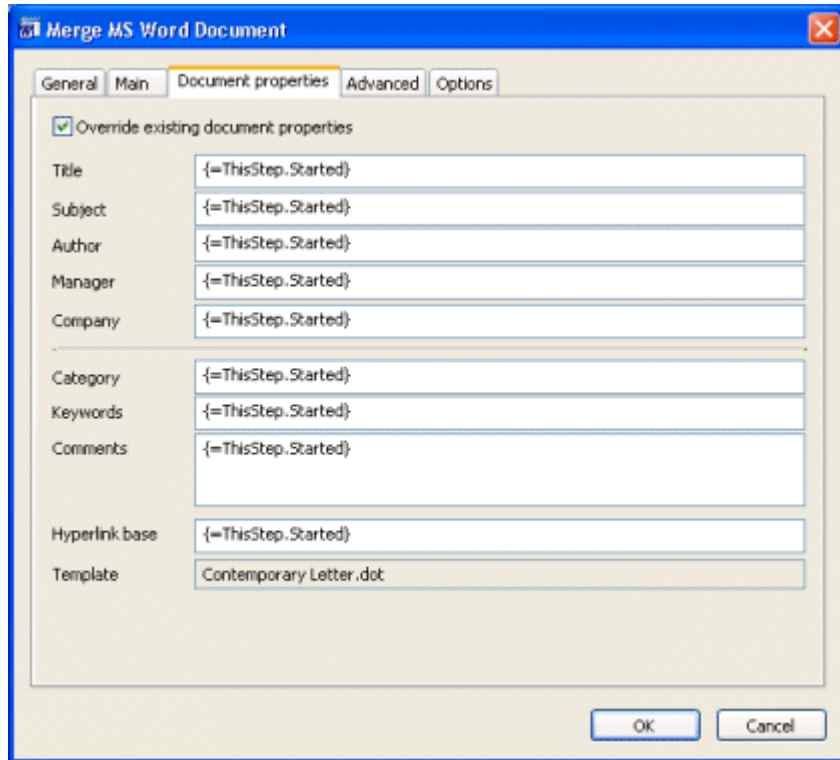


Figure 3. Merge MS Word Document – Document Properties tab.

Advanced

The '**Advanced**' tab (Ref: Figure 4) allows users to customise the mail merge document's SQL statement that Word uses to select the applicable data source, either manually or by dragging and dropping objects into the SQL from the Task Browser dialog.

The tab contains the following:

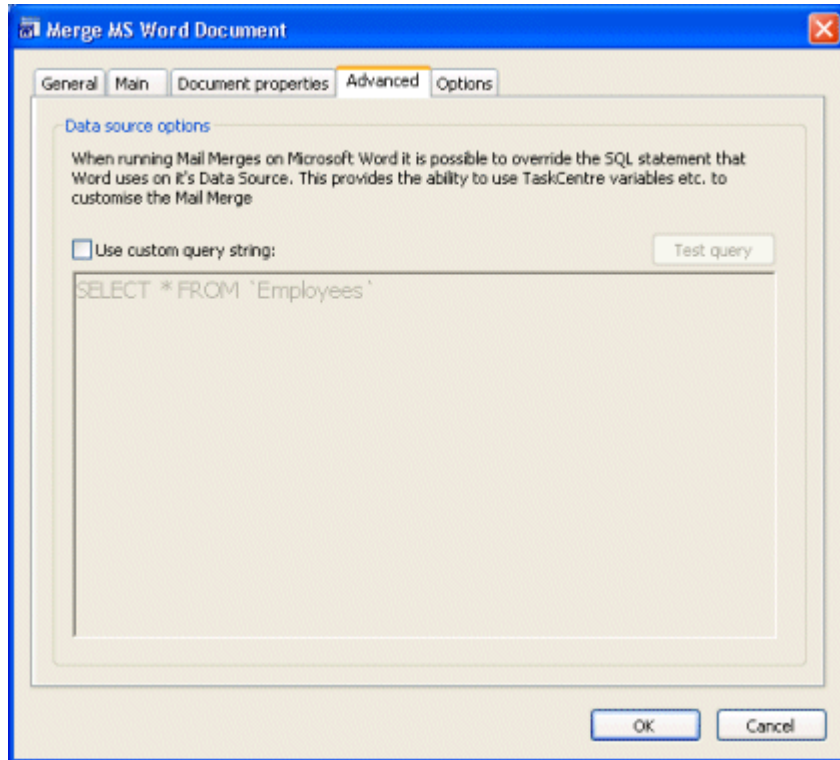


Figure 4. Merge MS Word Document – Advanced tab.

Options

The '**Options**' tab (Ref: Figure 5) is used to configure the Step behaviour if an error occurs when the Step is being processed.

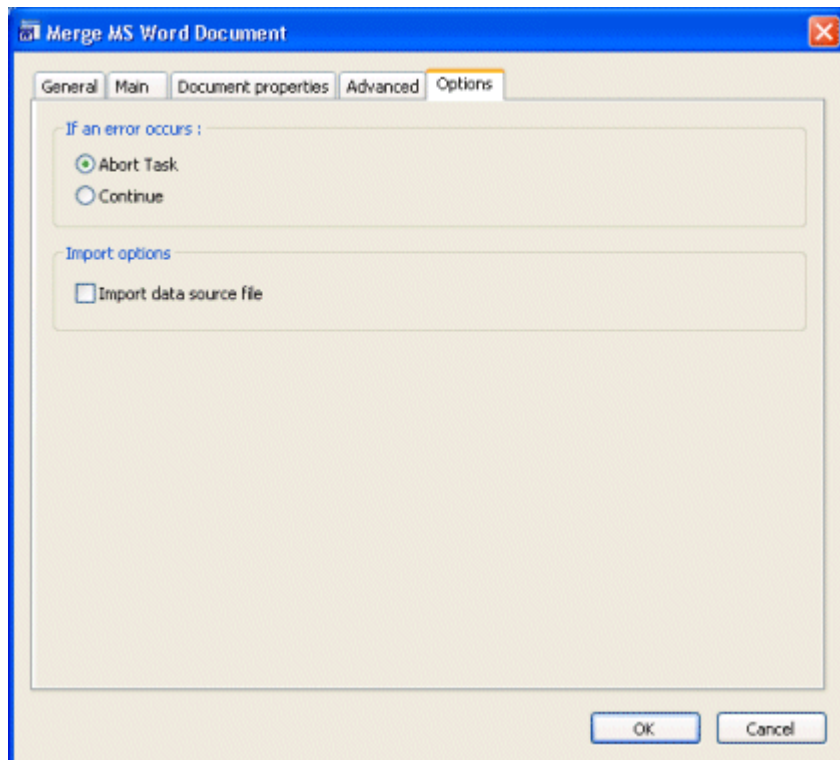


Figure 5. Merge MS Word Document – Options tab.

The following options are provided for selection:

- **Abort Task** - If the Step is aborted then the Task is aborted.
- **Continue** - If the Step is aborted then the Task will continue onto the next Step in the process if one exists.
- **'Import data source file'** check box - If selected then the mail merge data source file will be imported along with the document