



HCSS User's Conference

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Using Microsoft Word Merge Templates



Microsoft Word Merge Templates

- Architectural overview
- Conversion of WordPerfect templates
- Creating new merge templates
- Day-to-day operations



Architectural Overview

- Merge occurs on the server
- Merge does *not* use Word on the server
- The merge result is a DOCX Microsoft Word document
 - Edit using Microsoft Word
 - Print using Word Viewer
- Merge templates are created from normal Microsoft Word DOCX documents



Conversion of WP Templates

- Conversion is performed on a workstation
 - Can 'see' (map) the WP template directory
 - WordPerfect, MS Word and WinZip installed
 - Modern version of Windows
- Install conversion package on workstation
- Click on icon to start conversion
- Follow initial instruction
- Then, hands off, and watch the show!



Conversion of WP Templates

- What can go wrong?
 - Images can be somewhat distorted.
 - Watermarks images are transferred, but check.
 - Borders are transferred, but check.
 - Text that was rotated will not be rotated in the result. Correct using Word's tools.
 - Check table layouts. Complex table layouts may be distorted.
 - Unusual font selection is possible.
- Changes must be reprocessed (described later)



Creating New Merge Templates

- Create a Word document (DOCX)
- The field concept used in WP is kept
 - Simply enter FIELDnnnn (where nnnn is a four digit number from the field list)

Data Field Title	Actual Data in Field	No	Lg
CAUSE INFORMATION			
ADULT/JUVENILE	Adult	478	8
ATTORNEY ADDRESS - CITY		259	25
ATTORNEY ADDRESS - STATE		259	25

- *Not* Word's mail merge field codes
- Add using "Add New Document"



Modifying Merge Templates

- Modify the DOCX using Word
- Use the (new) Replace Document command
 - The DOCX is preprocessed into a template
 - DOCX is really a *compound document* which is disassembled so that it can be reassembled after the specific data is merged in



Day-to-Day Operations

- Merge process will always deliver a DOCX document via the browser
- Users that need to edit the resulting document open the DOCX using Word
- All other users will use Microsoft Word Viewer
 - Equivalent to the Adobe Reader for PDF
- Create PDF using a PDF printer or using Word or Viewer *Export to PDF* capability



Thank you

