

Workshop on Census Data Processing

Automerge Publisher User Manual



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Teleform Modules

Teleform consists of seven main programme modules: Designer, Automerger Publisher, ScanStation, Reader, Verifier, Remote Capture Station and Web Capture Option. Each of these serves a distinct function and each has its own icon in the Teleform programme group.

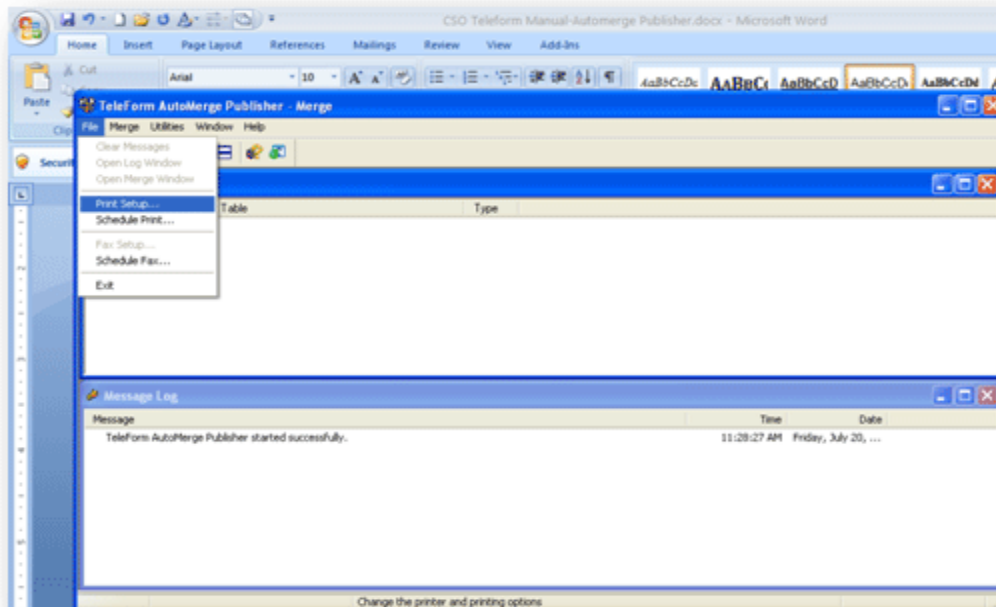
Teleform Automerger Publisher Module

The AutoMerge Publisher is the built-in "Distribution" module for TeleForm. Its function is that of merging customized information onto documents and distributing them by print, fax or email.

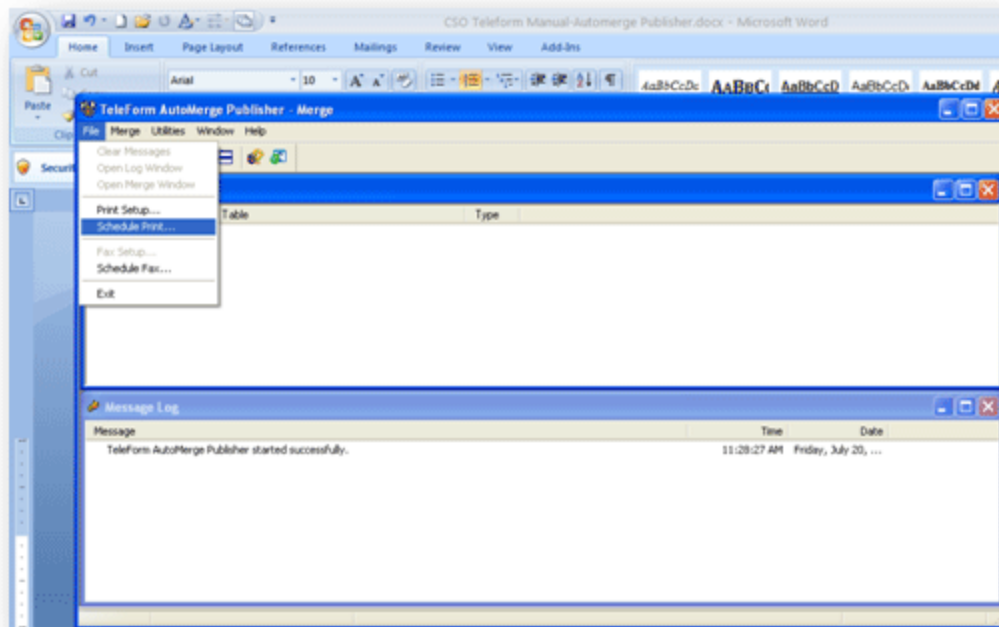
PRINTING FROM AUTOMERGE PUBLISHER

How To Print From Automerger Publisher

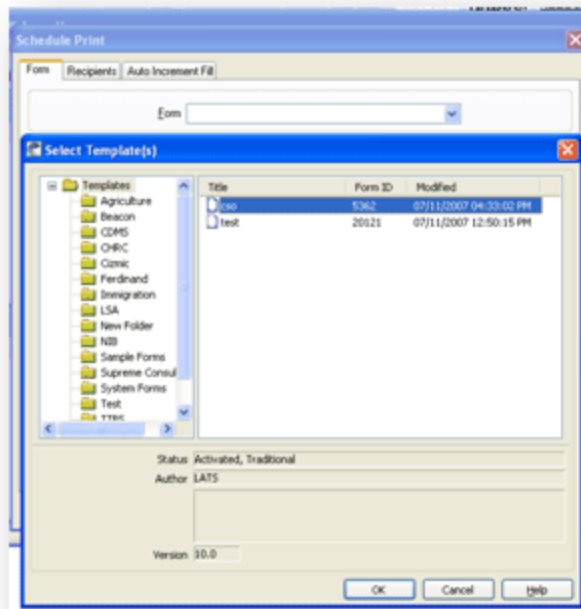
1. Open **Automerger Publisher – Merge**.
2. Under **File**, click **Print Setup**.



3. Click on the **Properties** button. The window that opens up provides various printer settings for you to configure to suit the expected format of the Form Template to be printed. This includes page orientation, simplex or duplex printing, size of paper, the origin of the paper in the printer (i.e. which tray the paper will be fed from), print and image quality, whether collation is required etc.
4. When the **Print Set Up** has been configured, click **OK**.
5. Under **File**, click **Schedule Print**.



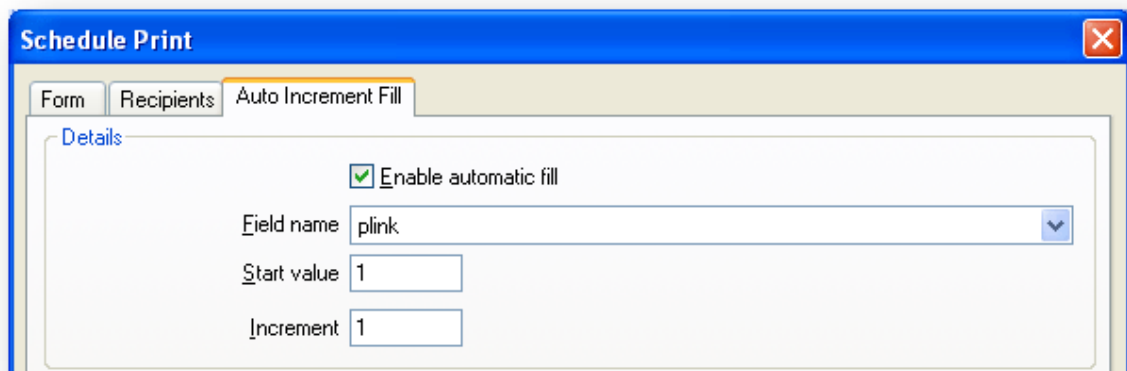
6. In the **Schedule Print** window, click on the **Form** tab.
7. Click on the Form box. A **Select Template** window will open from which you select the Form Template you will be printing.
8. Select the Form Template and click OK.



9. In the Pages block on the Form tab, you can select **All** pages to print or specify which pages and how many copies.
10. The **Date** and **Time** fields define when the print job will begin. They are set to the current date and time as read from your workstation. If you schedule a job to begin in the future, you **MUST** leave **AutoMerge Publisher** running until the job is complete.

The screenshot shows the 'Schedule Print' dialog box with the 'Form' tab selected. The 'Form' dropdown menu is set to 'cso'. The 'Pages' section has 'All' selected, 'From' is '1', 'To' is '2', and 'Copies' is '1'. The 'When' section has 'Date' set to '7/20/2007' and 'Time' set to '11:43:16 AM'.

11. Click on the Auto Increment Fill tab. This feature automatically fills a single data entry field on each printed form with an integer. This integer is incremented by a certain number, so that each form in the print job displays a unique value in the selected field.
12. Check the Enable automatic fill box. This activates the options underneath.
13. Click the Field Name box, and select the name of the field you are using as the page link.
14. Type in a **Start** value as well as an **Increment** number by which each printed Form Template will be incremented.
15. Click OK. The Form Template will now be sent to the designated printer.



The screenshot shows a Windows-style dialog box titled "Schedule Print" with a close button (X) in the top right corner. It has three tabs: "Form", "Recipients", and "Auto Increment Fill", with the "Auto Increment Fill" tab currently selected. Below the tabs is a "Details" section. Inside this section, there is a checked checkbox labeled "Enable automatic fill". Below this checkbox are three input fields: "Field name" with a dropdown menu showing "plink", "Start value" with a text box containing "1", and "Increment" with a text box containing "1".

USING THE AUTOMERGE FEATURE

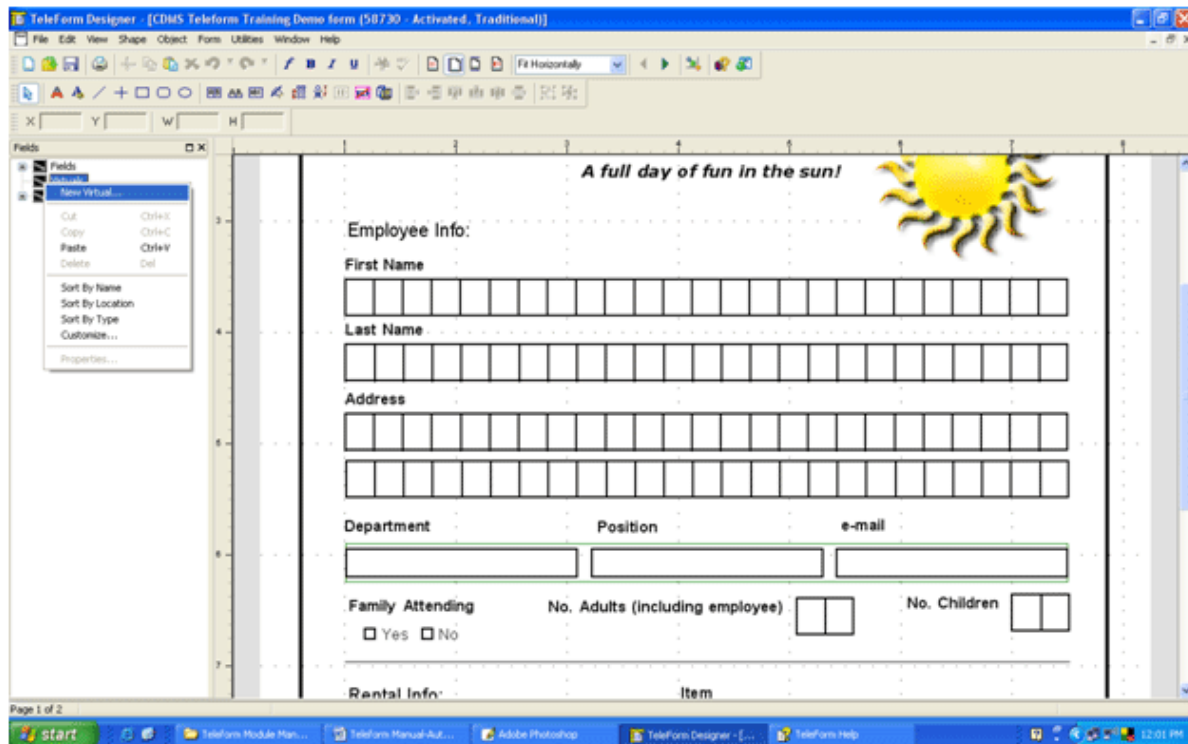
The Automerge feature facilitates the adding of information from a database to defined data entry fields on a Form Template before the Form Template is distributed. The information on these forms can be customized and distributed to an unlimited number of recipients.

Form Templates that commonly use this feature include:

- Forms that are to be completed and returned
- Documents that are designed for sending out information
- Email messages with or without attachments

How to Configure a Merge Database within Teleform

1. Open your Form Template.
2. Under Fields, right click on Virtuals and select New Virtual.



3. In the Virtual Field window, type Record_Sta in the Field ID box. You can repeat the same name in the Title box. This field starts the merge and indicates the status of the merge and **is required for every form that uses Automerge Publisher**. Its values are as follows:

23: *Waiting (merge will start at specified time, ASAP or "Time_Stamp")*

22: *Pending*

21: *Merge initiated (print or fax merge)*

21: *Merge successful (email merge)*

20: *Merge successful (print or fax merge)*

19: *Merge failed*

4. Click OK.

Virtual Field

Field Info | Validation/Output

Field ID: Record_Sta

Title: Record Sta

Description:

Summary	Field Type	Virtual Field
	Data Type	String
	Length	30
	Decimal Places	0
	Title	Record Sta
	Default Value	

Preview

OK Cancel Restore Help

5. Any other merge field you need to use has to be created as a virtual field e.g. Send_Type or Remote_Eml.
6. From the Form menu, click Auto Export Setup or right-click an empty area of the template and select **Auto Export Setup**.
7. To create a new auto export, click the **New** button.
8. A second **Auto Export Setup** dialog box will appear.

Auto Export Setup

Select

Table	Enabled

☐ Enable
☐ Fail commit if this export fails
☐ Save to internal datafile also

CDMS Teleform Training Demo form - Auto Export Setup[1]

Main | File Export | Fields | Detail Groups

Table

Format: Microsoft Access (.MDB)

Separator: <None>

Settings

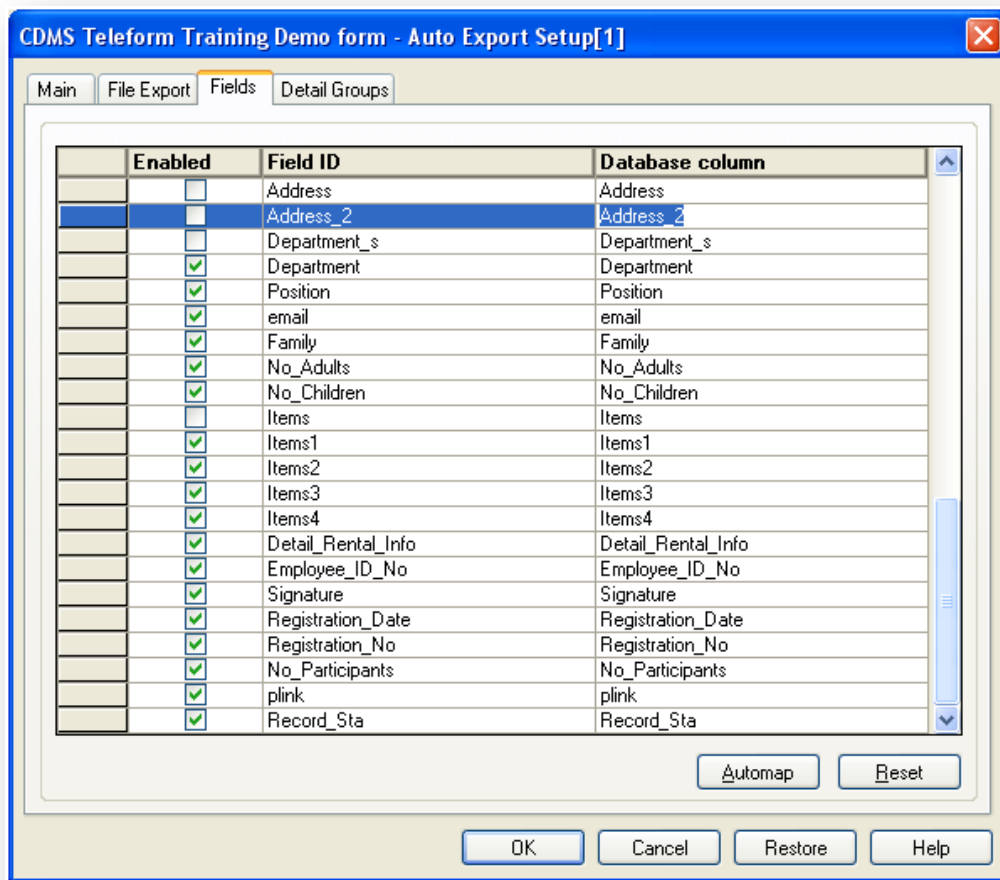
☐ Enable
☐ Fail commit if this export fails
☒ Disable export locks
☒ Include header

Conditional Export

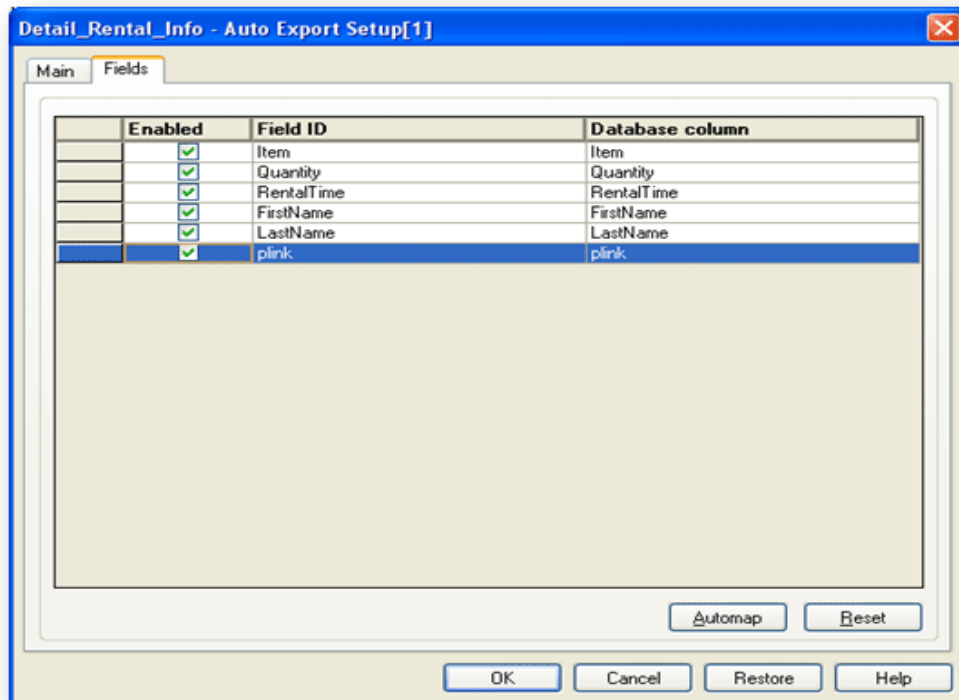
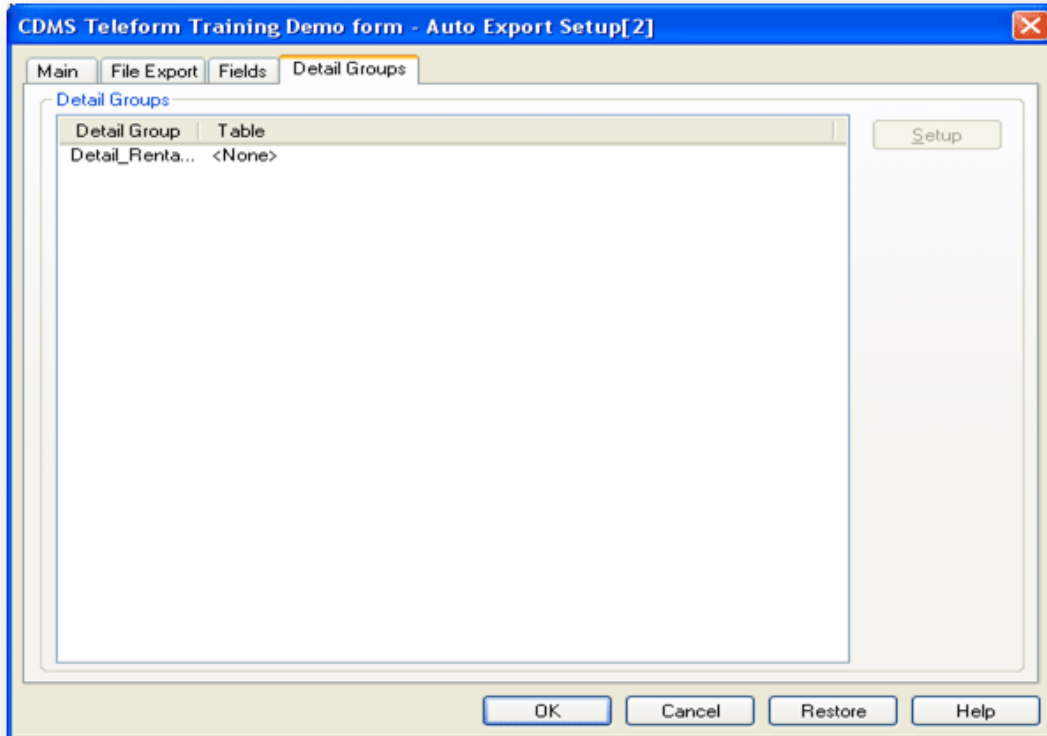
☐ Skip this export if

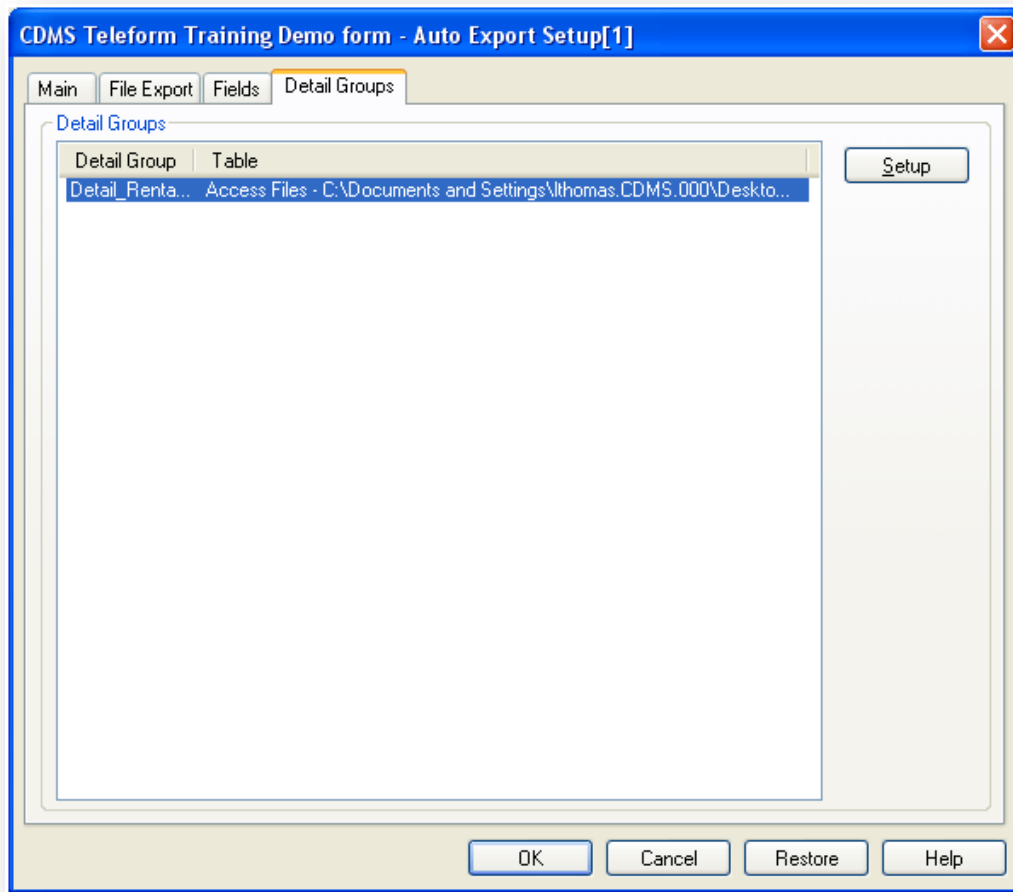
Field	Condition	Value

9. Choose a database **Format** (preferably not CSV or DEL as these encounter problems when merging) and click the **Save as** button. (TeleForm would automatically create most databases from the list. Empty Access and SQL databases will have to be created beforehand as TeleForm does not create these automatically).
10. Select the folder to which you will be exporting the data collected and enter a name in the **File Name** box. Click OK.
11. Select the **Enable** check box to activate the Auto Export.
12. The following **Settings** are optional:
 - ***Fail commit if this export fails*** – this function works if an item being processed is part of a batch (a set of files processed together instead of separately). When it is enabled, data will be exported up until the point of failure
 - ***Disable export locks*** – certain export database formats will enable this feature automatically. This allows multiple Verifier stations to export data to the file at the same time.
 - ***Include header*** – certain export database formats will enable this feature automatically. This feature allows Field ID's to be exported as the first record or row in the database.
 - ***Conditional export*** – this feature forces TeleForm to skip the Auto Export of a template if the value of a field on that template matches a specified criterion. This function works on the level of individual files, not batches.
13. Click on Fields tab.
14. Under the **Enabled** column, check the boxes next to the **Field ID** you want exported to the database and uncheck those that you do not want exported. (**Make sure that the Virtual Fields that correspond to the merge fields are selected. Disable any Virtual Fields that are not required for the Form Template.**) You can select multiple fields and press the SPACEBAR to disable them all. You can also select multiple fields and deselect the **Enable** check box for any one of them. All of the selected fields will then be disabled.
15. Under the **Database** column, you can rename the items in the list if you are setting up an export to a new database. Double click the item you want to rename or highlight it and type the new name.
16. The **Automap** button searches for matches between the database columns and the template fields. When it finds an exact match, it will map the template field to the database column automatically.
17. When you have finished configuring the **Fields** tab, click OK.

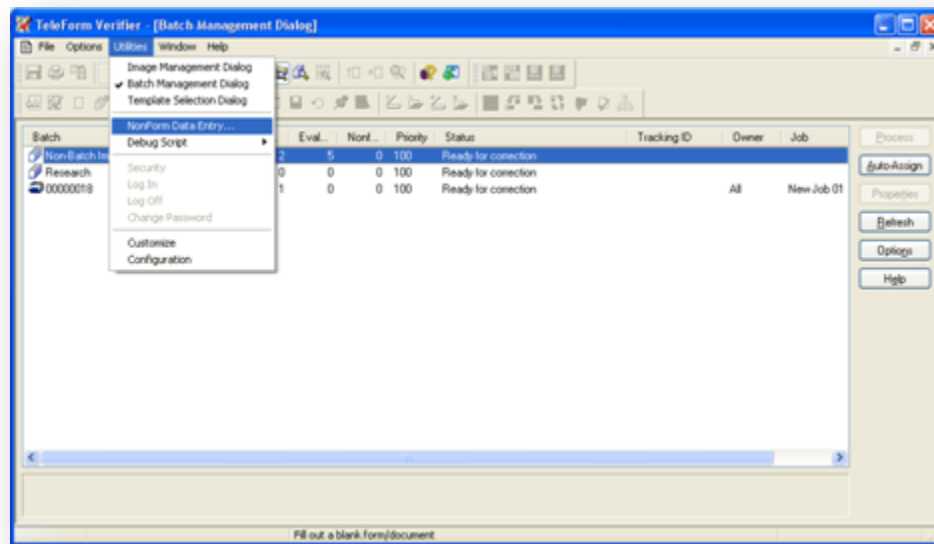


18. Select the **Detail Group** and click the **Setup** button.
19. Another **Auto Export Setup** dialog box will appear. This dialog box only affects the selected Detail Group.
20. Make the appropriate settings on the **Main** tab.
21. Click Save As and select the folder to which the Detail Group will be exported.
22. Open the **Fields** tab.
23. Select the **Enabled** check box for each data entry field within the Detail Group. You may choose not to export data from some data entry fields in the Detail Group, but this is rarely done.
24. Click **OK** on the **Auto Export Setup** dialog boxes for the Detail Group and the "parent" Auto Export.





25. Make sure that the "parent" Auto Export is enabled.
26. Save the Form Template.
27. Start TeleForm Verifier
28. From the **Utilities** menu, click **NonForm Data Entry**.



29. In the **Select Template(s)** window, select the Form Template onto which you will merge data and click **OK**.

CDMS
Family Beach Day!
A full day of fun in the sun!

Registration Form

Employee Info:

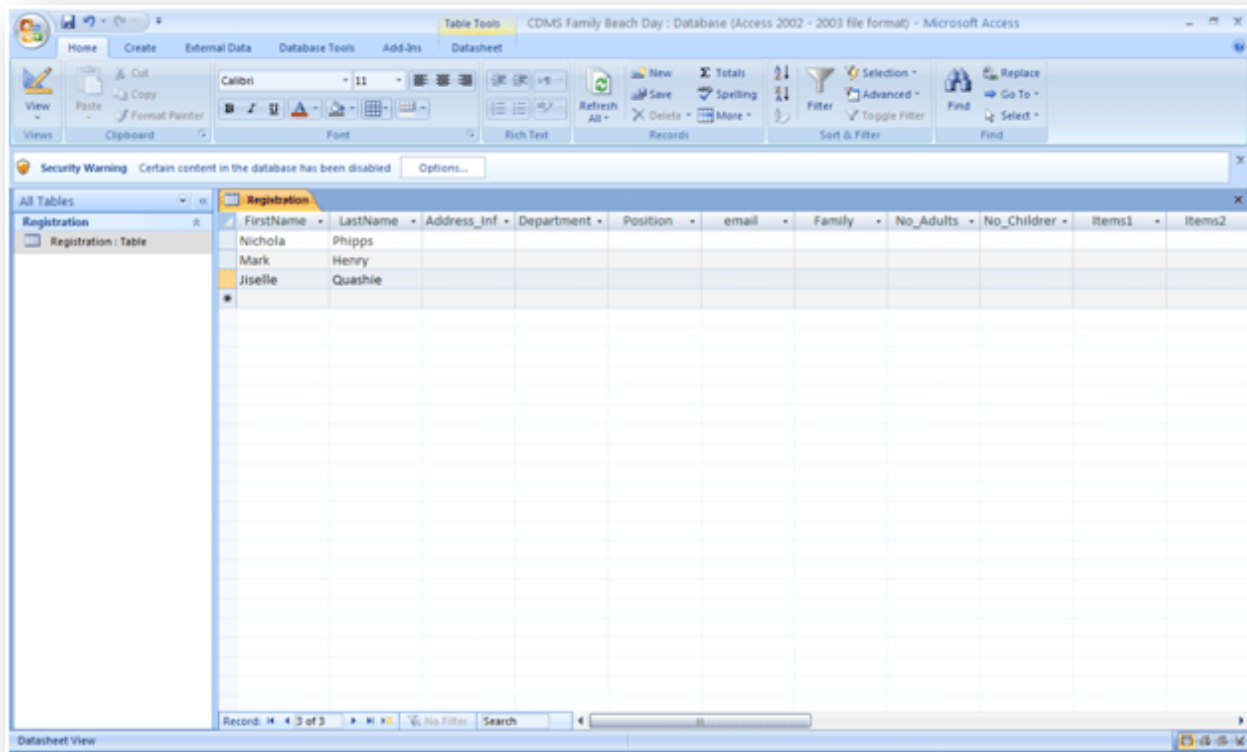
First Name

First Name

Always Review [Evaluated OK]

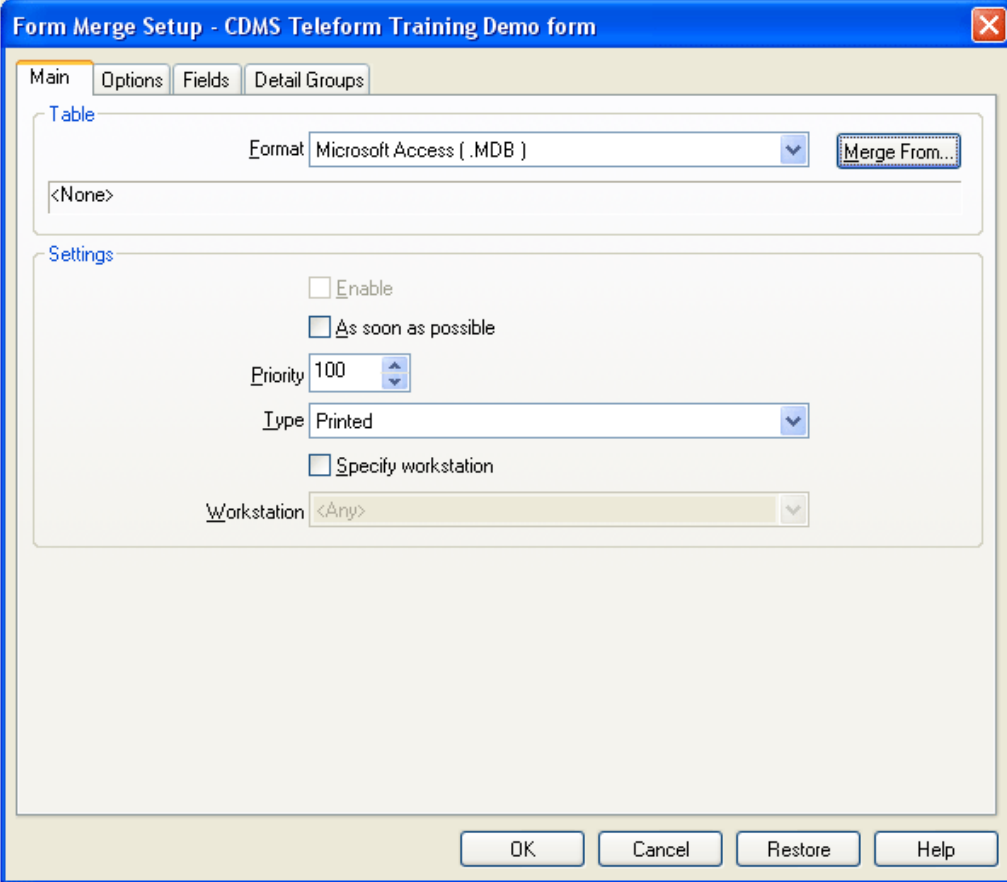
30. The Form Template will appear on the screen. Fill in the fields.

31. When you have filled in the last data entry field, you will be prompted to "Save the results to correction file?" Click **Yes**.
32. You will be asked if you want to fill in another form. Click **No**.
33. The data you entered will be exported to the database you specified in Auto Export setup.
34. Open the export database. The database should have all the data entry fields you checked for export in the Auto Export setup.



35. Fill the relevant fields with the values that you want to merge onto your Form Templates.
36. Ensure that the Record_Sta column contains 23.
37. From Designer's **Form** menu, click **Auto Export Setup**.
38. On the **Auto Export Setup** dialog box, select the Auto Export that you used to create the merge database and deselect the Enabled check box. It is advisable to disable this auto export as this database would be overwritten when forms are returned and processed. Additional Auto Exports can be set up to collect information from the merged version of the form.

39. Your merge database **MUST** include the "Record_Sta" column and Time_Stamp column and at least one other column such as Remote_Cmp or Remote_Usr which are default Field IDs.
40. Start the AutoMerge Publisher.
41. Under Merge on the Menu, select New.
42. In the Select Template window, choose the Form Template on which you want to merge information.
43. In the Form Merge Setup under the Main tab, select the database format.
44. Click on Merge From button.

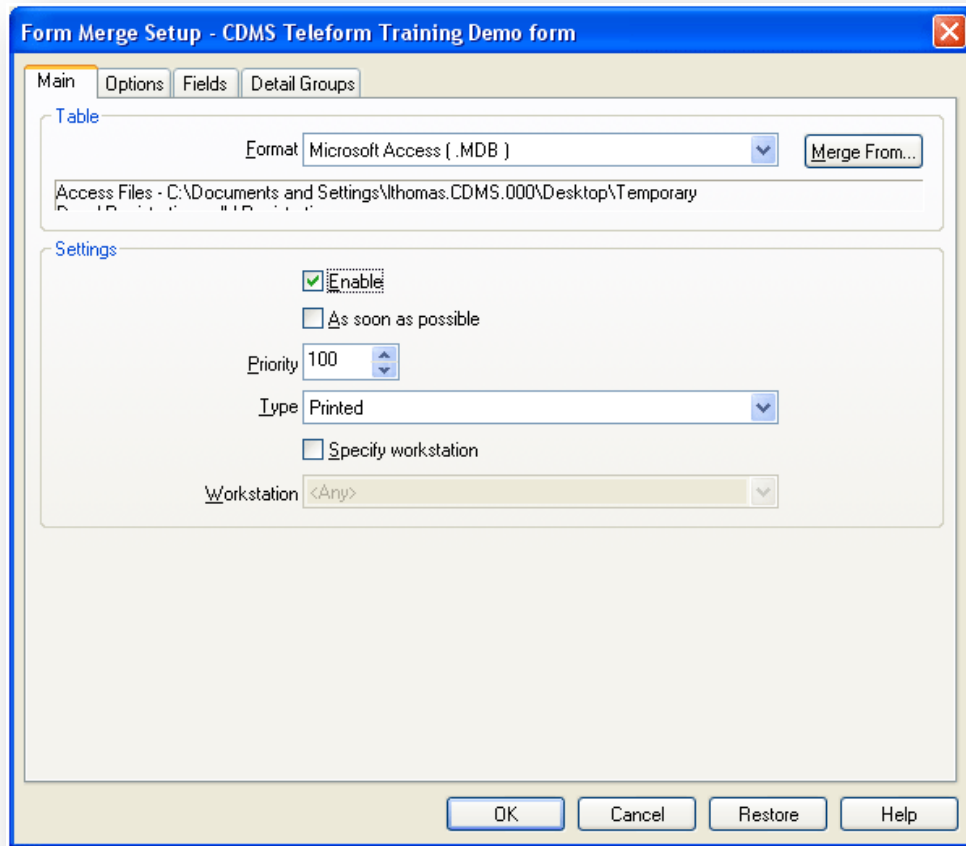


The image shows a Windows-style dialog box titled "Form Merge Setup - CDMS Teleform Training Demo form". It has a blue title bar with a close button (X) in the top right corner. The dialog box contains two tabs: "Main" and "Options". The "Main" tab is selected and shows the following settings:

- Table:** A section with a "Format" dropdown menu set to "Microsoft Access (.MDB)" and a "Merge From..." button to its right. Below the dropdown is a text field containing "<None>".
- Settings:** A section with several options:
 - ☐ Enable
 - ☐ As soon as possible
 - Priority:** A numeric spinner box set to 100.
 - Type:** A dropdown menu set to "Printed".
 - ☐ Specify workstation
 - Workstation:** A dropdown menu set to "<Any>".

At the bottom of the dialog box, there are four buttons: "OK", "Cancel", "Restore", and "Help".

45. In the Select Database window, select the database you created and the relevant Table from which the data will be drawn for the merge.



46. Under Settings, select Enable and As soon as possible if a time has not been set in the Time_Stamp column. Select OK.
47. Under Merge on the menu, select Process Merges. The merge process will commence according to the time stipulated in the Time_Stamp column or if you selected As soon as possible in the Settings in the Form Merge Setup window.
48. The merged pages will be sent to the designated printer.
49. Leave the AutoMerge Publisher running.

