

BSCI Word Merge iPart – User Notes - iMIS 15.1.3.xx

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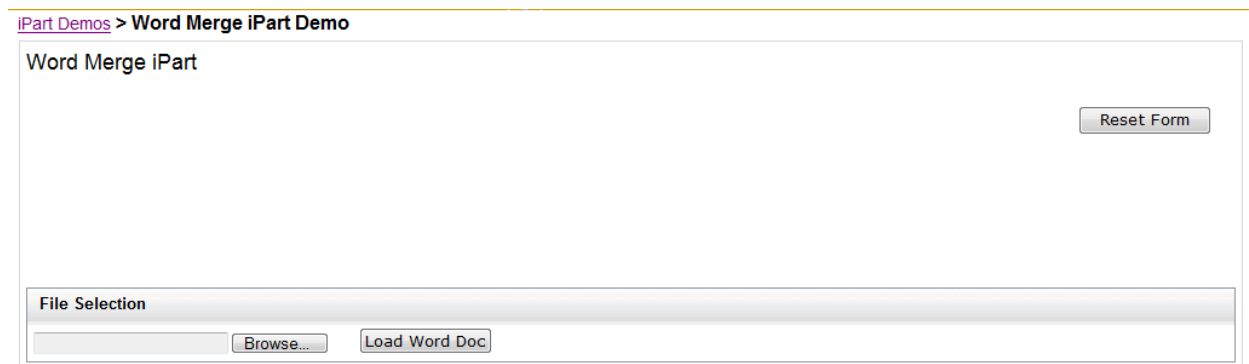
BSCI Word Merge iPart Overview

BSCI Word Merge iPart Feature Set Highlights

- Fully conforming ASI iPart
- Runs in iMIS 15.1 and 15.2
- Use the iPart in Desktop, Web View or Public View
- Support for MS Word 2007, 2010 and Open Office word processing documents. Conforms to the Office Open XML File Format specification from Microsoft which is an open, international, ECMA-376 Second Edition and ISO/IEC 29500 standard.
- Uses regular iMIS IQAs for all data access.
- Set of 4 rich but simple run-time features (create Activity record, etc..)
- Ability to send merge document as email attachment.
- No special setup required like traditional MS Word merge documents to connect to an external data source.
- Simple to use.
- Future support for sending merge document as email attachment.

Description of how the iPart Works

The BSCI Word Merge iPart merges IQA data from iMIS into a standard MS Word document in a few simple steps. The default display panel is below.



The screenshot shows a web-based interface for the BSCI Word Merge iPart. At the top, there is a breadcrumb trail: [iPart Demos](#) > [Word Merge iPart Demo](#). Below this, the main content area is titled "Word Merge iPart". In the top right corner of this area, there is a "Reset Form" button. At the bottom of the interface, there is a "File Selection" section containing a text input field, a "Browse..." button, and a "Load Word Doc" button.

First, be sure the IQA has the data columns you want in your merge. Then create a new or use an existing normal MS Word or Open Office document and add merge fields where you want the data to appear. Next use the iPart to select the Word document and an IQA. Then you just match-up the document merge fields to IQA data and then merge into a new document with a few mouse clicks.

The iPart works as a series of 4 main panels that display in the sequence of: 1. select document, 2. select IQA, 3. match columns, and 4. merge into a new document.

Merge to Document
Hide

IQA Record Count: 66

Remove merge fields in document if no corresponding IQA data columns exist. See list of Merge Fields Removed to the right.

Merge only 10 records for preview.

Remove merge fields in document if IQA data column is empty/null/no data.

Create Activity records. The iMIS ID number must exist in the IQA and have an alias name of 'ID' for the Activity record to be created.

Merge Fields Matched

These are the merge fields that will be filled with IQA data.

| FullAddress FullName ID | FullAddress FullName ID |
|-------------------------------|-------------------------------|
| LastName Prefix | LastName Prefix |

Merge Fields Removed

These are the merge fields that will be removed from the document.

No merge fields will be removed.

Review the install and configure documentation for this iPart for details on configuration options when installing in WCM.

Using the iPart

Before using the tool

IQA Preparation

Any IQA will work but if you want to create Activity records you must include the ID field.

Create the IQA

- a. Before you begin, it's important you understand which fields you want in your letter, and where they can be found.
 - i. Information about the contact can be found in the CsContact object.
 - ii. Address information is in the CsAddress object
- b. Next, create the IQA using the fields you need for your merge (see IQA documentation for information on how to create an IQA)
- c. If the field names seem ambiguous, put a more descriptive name in the Alias field. It's best to omit spaces and not use special characters. The standard for field names is to capitalize the first letter of each word in the field name. For example, for Full Name use FullName
- d. Check the box "Only display unique results"

Summary Sources Filters **Display** Sorting

View Selected Mode Advanced

Query Display Columns [Hide](#)

Only display unique results

Selected Refresh

| Display | Property | Function | Alias | Subtotal | Order |
|-------------------------------------|---------------------|----------|----------|--------------------------|-------|
| <input checked="" type="checkbox"/> | CsContact.iMIS Id | None | ID | <input type="checkbox"/> | 1 |
| <input checked="" type="checkbox"/> | CsContact.Full Name | None | FullName | <input type="checkbox"/> | 2 |
| <input checked="" type="checkbox"/> | CsContact.Prefix | None | | <input type="checkbox"/> | 3 |
| <input checked="" type="checkbox"/> | CsContact.Informal | None | | <input type="checkbox"/> | 4 |
| <input checked="" type="checkbox"/> | CsContact.Last Name | None | LastName | <input type="checkbox"/> | 5 |
| <input checked="" type="checkbox"/> | CsContact.Title | None | | <input type="checkbox"/> | 6 |
| <input checked="" type="checkbox"/> | CsContact.Company | None | | <input type="checkbox"/> | 7 |
| <input checked="" type="checkbox"/> | CsAddress.Address 1 | None | Address1 | <input type="checkbox"/> | 8 |
| <input checked="" type="checkbox"/> | CsAddress.Address 2 | None | Address2 | <input type="checkbox"/> | 9 |
| <input checked="" type="checkbox"/> | CsAddress.Address 3 | None | Address3 | <input type="checkbox"/> | 10 |
| <input checked="" type="checkbox"/> | CsAddress.City | None | | <input type="checkbox"/> | 11 |

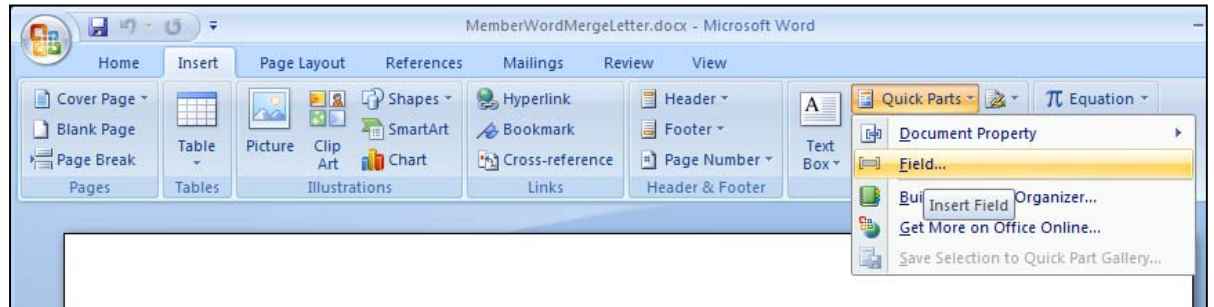
Word Document Preparation

Start with a normal Word document. Do not use any of the merge features in Word that require you to connect to a data source or create the document as a merge document using a Word wizard or normal Word merge features.

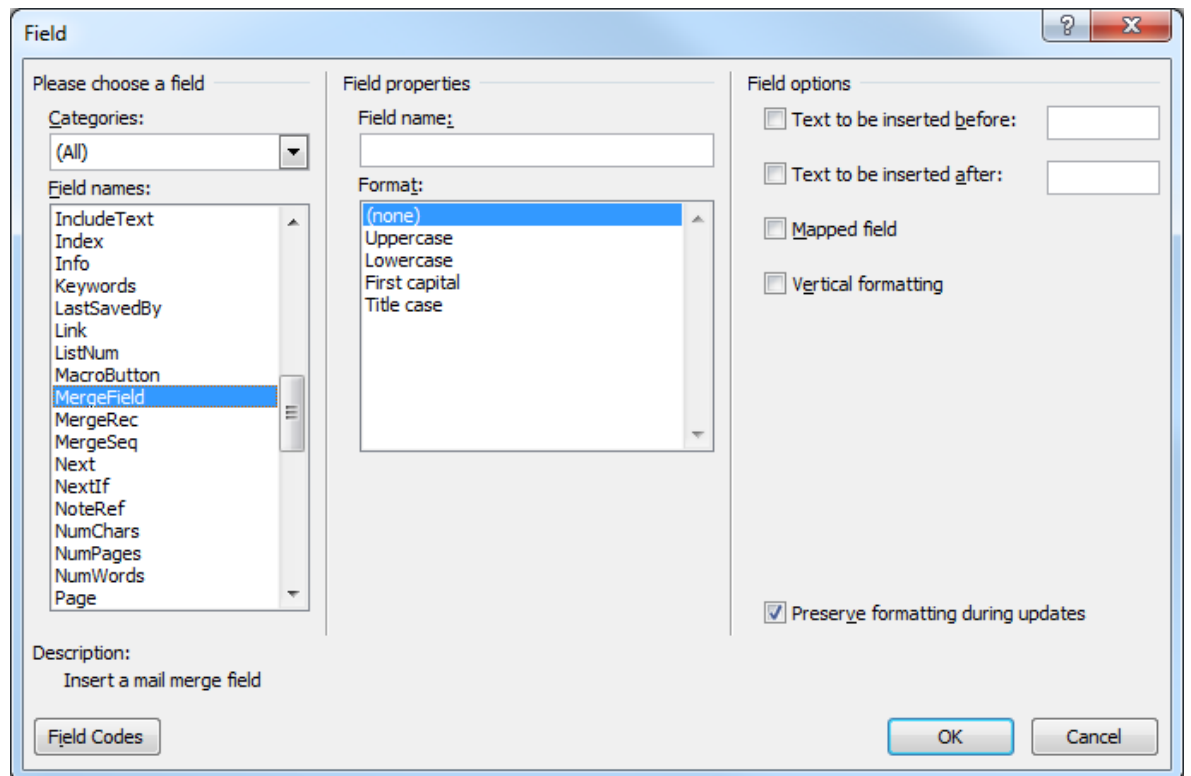
Place merge fields in your document where you want them. The iPart is designed to work with merge field elements that conform to the Open XML File Format standard. These are inserted in MS Word as follows.

Put your cursor where you want the field to be placed in the document.

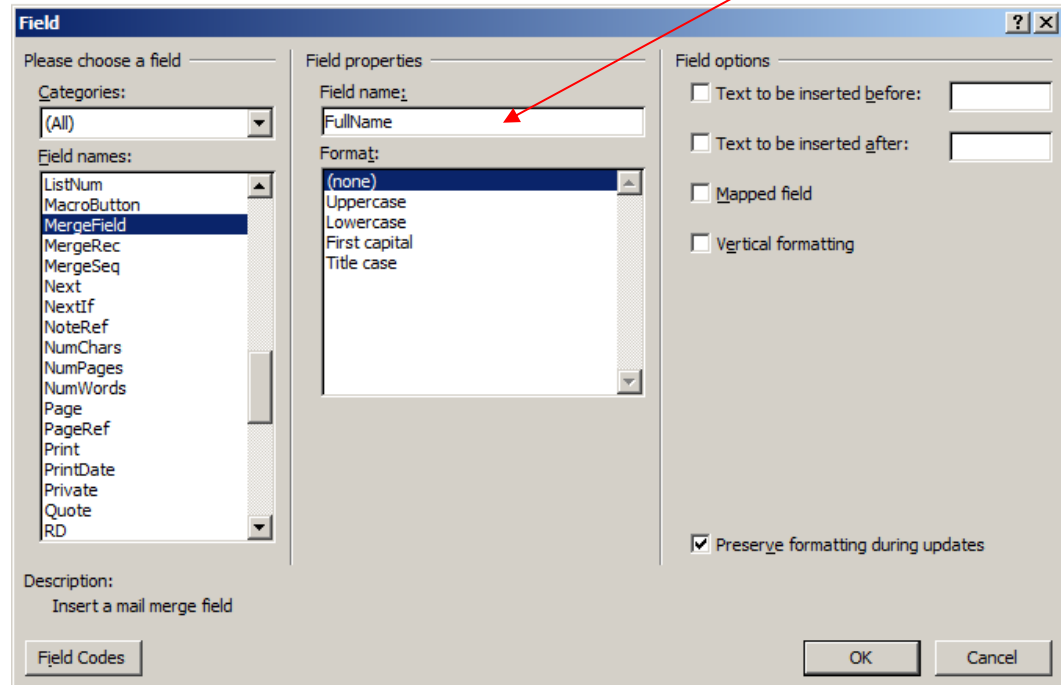
Select Insert → Quick Parts → Field



Choose 'Merge Field' from the list of field names.

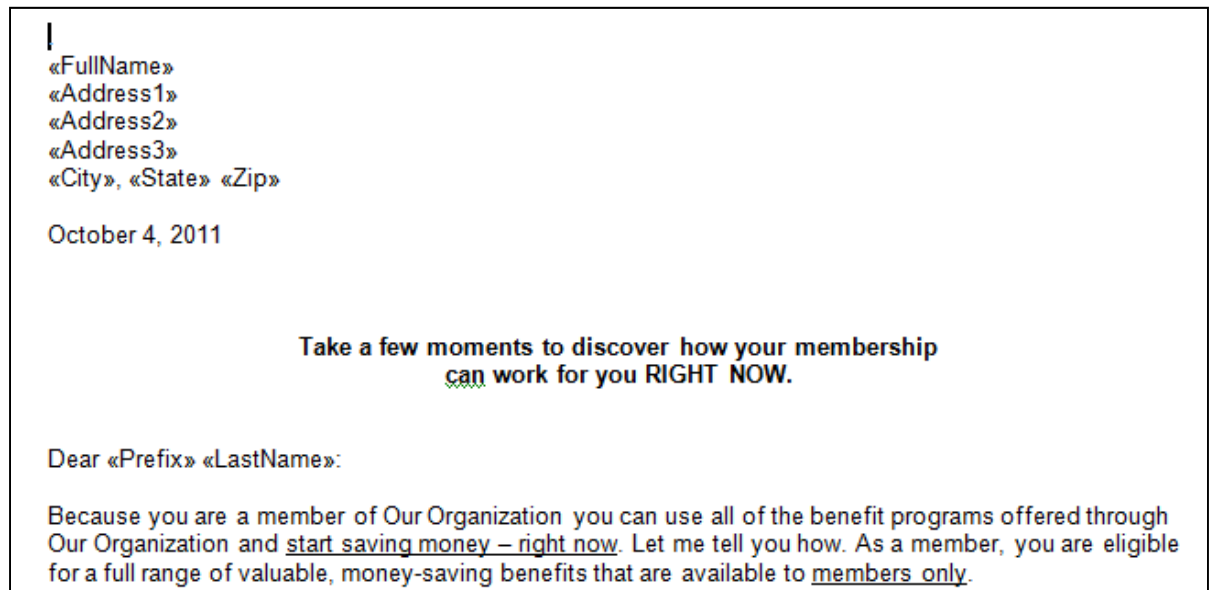


Type a name for the merge field that you will match to columns in an IQA. The merge field names in the document do not have to match the IQA column names.



There is only one special consideration when creating merge fields, if you want to use the iMIS Full Address you must name the merge field: FullAddress

You should see the field placed in the document as below:



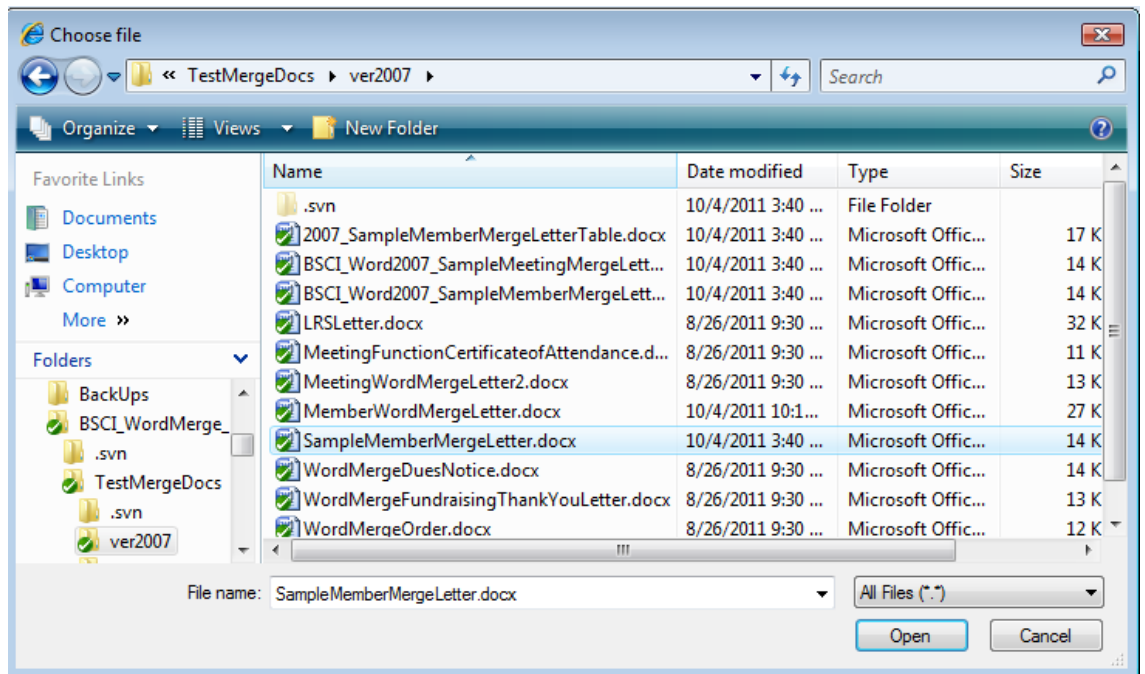
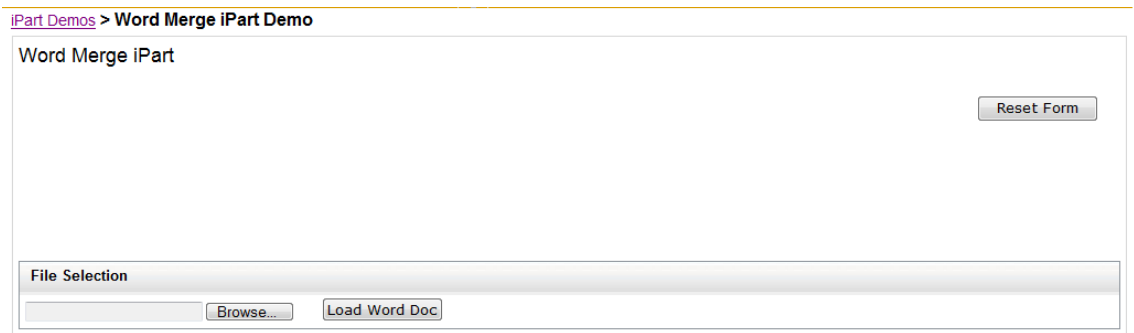
Save the document as a normal Word document.

Now with an IQA and a Word document ready you can perform the Word merge using the iPart in iMIS.

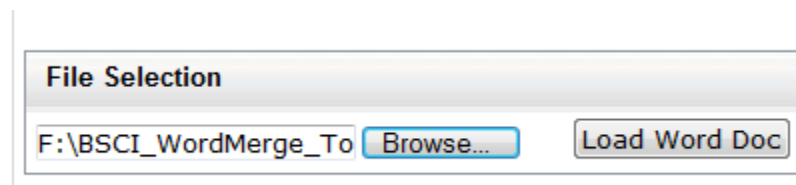
Basic Merge Steps

Word File Selection Panel

First the user selects the Word document; this is the default iPart display panel in normal iMIS 15 CMS content.



After selecting the file, click "Load Word Doc"



Your file name will be displayed in the IQA Selection panel.

IQA Selection Panel

Click on the 'Select IQA' button and drill out to an IQA in iMIS.

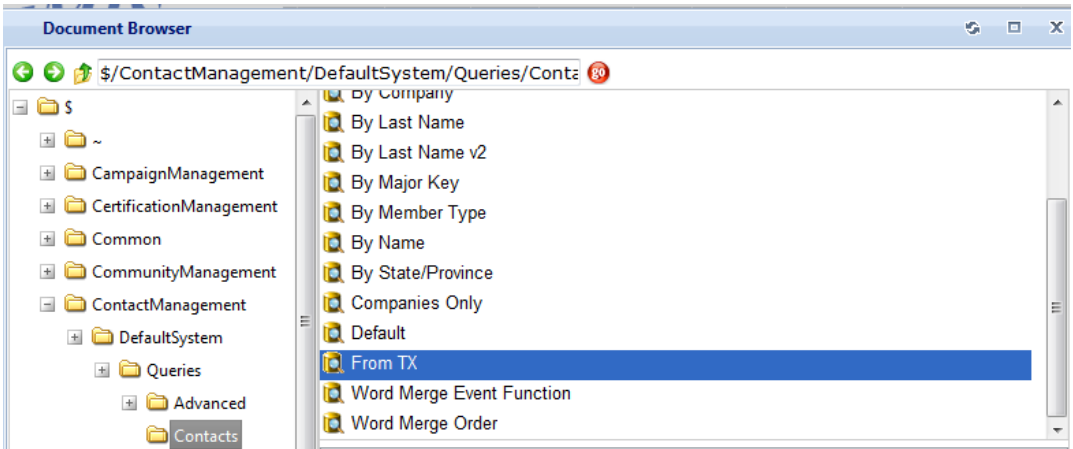
[Reports](#) > **Word Merge iPart Demo**

Word Merge Demo iPart

Selected Document:
SampleMemberMergeLetter.docx; ver: w10 (MS Word 2007)

Select IQA

Choose your IQA



Click Continue

[Reports](#) > **Word Merge iPart Demo**

Word Merge Demo iPart

Selected Document:
SampleMemberMergeLetter.docx; ver: w10 (MS Word 2007)

Select IQA

Matching Panel

Use this panel to match up IQA columns to merge fields from the Word document. This is where you tell the iPart where to put the IQA data in the document. For each merge field on the left side pull down the drop-down list and choose an IQA column to match the data to. If no IQA column matches the merge fields then leave the drop-down blank.

When finished, click Continue

Word Merge Demo

Selected Document: w10 (MS Word 2007)

SampleMemberMergeLetter.docx; ver: w10 (MS Word 2007)

Selected IQA: \$/ContactManagement/DefaultSystem/Queries/Contacts/From TX

| Word Merge Fields Found | IQA Column Names |
|-------------------------|------------------|
| Address1 | Address1 |
| Address2 | Address2 |
| Address3 | Address3 |
| City | City |
| FullName | FirstName |
| LastName | LastName |
| Prefix | Prefix |
| State | StateProvince |
| Zip | Zip |

(column name) or Alias found on the Display tab of the IQA definition.

Reset Form **Continue**

Merge the Files

On the merge display panel, the top half shows the files you are using in your merge.

The bottom will show you the number of records returned by the IQA, the merge fields that matched, and any merge fields that were removed because there was no matching column in the IQA.

Word Merge Demo iPart

Selected Document: SampleMemberMergeLetter.docx; ver: w10 (MS Word 2007)

Selected IQA: \$/ContactManagement/DefaultSystem/Queries/Contacts/From TX

Merge to Document

IQA Record Count: 65

Remove merge fields in document if no corresponding IQA data columns exist. See list of Merge Fields Removed to the right.

Merge only 10 records for preview.

Remove merge fields in document if IQA data column is empty/null/no data.

Create Activity records. The iMIS ID number must exist in the IQA and have an alias name of 'ID' for the Activity record to be created.

No ID column was found in the IQA data so no Activity records can be created.

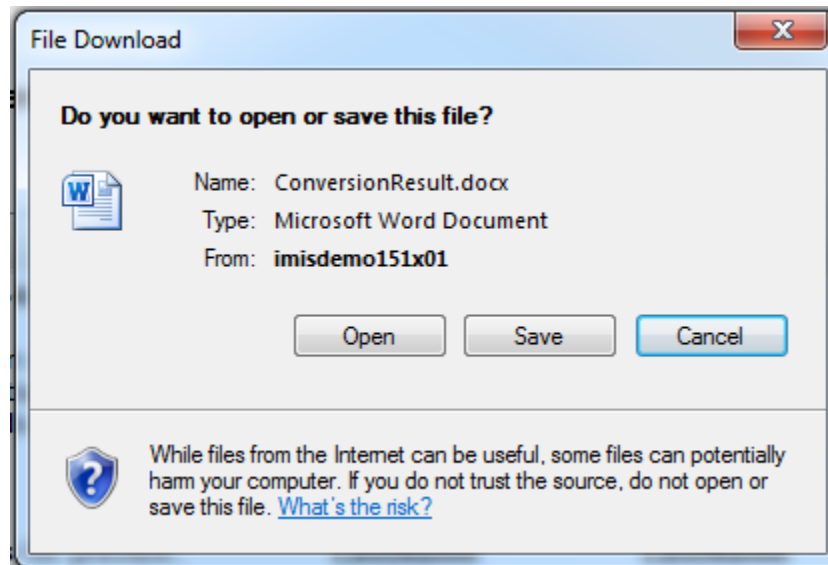
| Merge Fields Matched | Merge Fields Removed |
|----------------------|----------------------|
| Address1 | Address1 |
| Address2 | Address2 |
| Address3 | Address3 |
| City | City |
| FullName | FirstName |
| LastName | LastName |
| Prefix | Prefix |
| State | StateProvince |
| Zip | Zip |

Merge **Re-Match**

On the right side you have some runtime options: Remove merge fields if no IQA columns exist, show only ten records for preview, remove empty/null fields, create activity records. Note you must include ID in the merge if you want to create activity records.

If you make a mistake matching the fields, you can redo this by clicking the Re-Match button.

Click Merge and the iPart will merge the IQA columns with the Word fields. When complete, a dialog window will appear:



Once Word opens the document it can be edited and saved like any other Word document. If you have more than several hundred records in your IQA it may take some time for Word to paginate through the newly spawned document depending on system resources.

Peter Bachman
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January 16, 2012

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Overview of Runtime Options

Merge to Document
Hide

IQA Record Count: 66

Remove merge fields in document if no corresponding IQA data columns exist. See list of Merge Fields Removed to the right.

Merge only 10 records for preview.

Remove merge fields in document if IQA data column is empty/null/no data.

Create Activity records. The iMIS ID number must exist in the IQA and have an alias name of 'ID' for the Activity record to be created.

Merge Fields Matched

These are the merge fields that will be filled with IQA data.

| | |
|--------------------|--------------------|
| FullAddress | FullAddress |
| FullName | FullName |
| ID | ID |
| LastName | LastName |
| Prefix | Prefix |

Merge Fields Removed

These are the merge fields that will be removed from the document.

No merge fields will be removed.

- Remove merge fields in document if no corresponding IQA data columns exist. See list of Merge Fields Removed to the right.

If you have a word document that has fields that do not exist in the IQA, the fields are removed from the Word document if this is checked.

- Merge only 10 records for preview

This will allow you to preview the merge with just ten records rather than waiting for the entire merge to run.

- Remove merge fields in document if IQA data column is empty/null/no data

Similar to the first option, this will remove the merge field if the IQA field is present but has no data.

- Create Activity records. The iMIS ID number must exist in the IQA and have an alias name of 'ID' or 'iMIS ID' for the Activity record to be created

Although the ID does not have to appear in the Word document, it must be part of the IQA to produce an activity record. If selected, the Word Merge iPart will create a LETTER type Activity record.

| Results | Record History | Activities-All | Calls | Letters | Roster | AR/Cash | Billing | Events | Orders |
|---------|----------------|----------------|-------|---------|--------|---------|---------|--------|--------|
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

How to Format Word Merge Fields