

Re: Merge Document and Fill in Form (Word 2000)

Source:

<http://www.tech-archive.net/Archive/Word/microsoft.public.word.mailmerge.fields/2005-04/msg00245.html>

- *From:* "T0kein" <starad@xxxxxxxx>
 - *Date:* Wed, 6 Apr 2005 08:55:37 -0700
-

Again, I thank you for your detailed questions and suggestions. Here are some answers to the questions you raised.

There are basically two processes going on.

1. The mail merge process is performed by HR prior to sending the documents to the respective Managers. Hence my prior question regarding ways to repeat text fields on the final document. This way the Employee Name can be placed on each page (Header or Footer) to differentiate it from other pages when printed out.

2. The process we are having the most difficulty with is the form filling exercise. I need to clarify that the Manager receives a pre-merged document in Word for each employee and needs to fill it out. We want to create an automated way for the Manager to fill out the document, append his/her signature to it and send the document on its way. There will be secure access to the documents on the network for the Managers and HR.

What I am not clear about is your suggestion of using a VBA userform. Wouldn't this mean having to redesign the form? Whereas all the Manager needs to do is fill out the remaining sections with their comments on the employee's performance. I wonder if it would be possible to use a process that includes a question-and-answer exchange without a re-designing and creating a new form. Thanks in advance for any comments you may have.

T0kein

>-----Original Message-----

>OK, I can only really make a few more points and ask a few more questions.

>e.g.

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- >
- >I think you need to be sure that your approach will in fact be more secure
- >than a more paper-based one. I can imagine that is OK for one of the people
- >involved if each user has a well-protected set of personal folders on your
- >network, but it's not so simple if two people have to sign, unless perhaps
- >they carry their signature files on removable devices. How forgeable might
- >these signatures, be, etc. Not my area, but either you already know how to
- >do all that stuff or you need to talk to someone who understands the
- >security and legal implications of using such signatures.
- >
- >It still isn't completely clear to me how the process will actually work.
- >Will there be a single Excel file with the employee data relevant to each
- >manager? In which case, is the manager going to do one merge at a time,
- >selecting an employee, then going through the report with the employee at
- >hand to agree and sign? Or is there one Excel file per employee? Why not
- >pre-merge all the employee reports and just leave the manager with a
- >form-filling exercise? Or do they need to be able to modify the text of the
- >report? Wha privacy issues might there be?
- >
- >Although you don't actually say so, I get the impression that you are
- >thinking of using an "online" form (i.e. using Word Form fields) for the
- >form-filling part. But if you are generating that from a Merge, you need to
- >consider how to do it, because form fields are not correctly preserved.
- >There is sample code in the MS KB, or it might be that the form resides in a
- >separate Word doc. and you piece together the report from the form+a file
- >generated from the merge. However, my inclination would be to use a VBA
- >userform on the grounds that
- > a. you will get much more control
- > b. it will be easier to do things such as let the manager specify an

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>employee name or an EW excel data source, or both, and do
correct validation
>on the data
> c. it would probably also be easier to do stuff such as
locate a signature,
>display a preview in the userform, and so on
>
>Just my 2 cents' worth,
>
>Peter Jamieson
>"T0kein" <T0kein@xxxxxxxxxxxxxxxxxxxxxxxxxxxx> wrote in
message
>news:B76255B8-BA71-4247-8D1E-B73E3CCCC93F@xxxxxxxxxxxxxxxxxxxx
>> Peter,
>> Thanks for your valuable suggestions.
>>
>> The current Performance Eval template doc in WD2000
needs to be modified
>> so
>> that we can encourage Managers and employees to fill it
out online and
>> preferably sign it online as well. Currently, the HR
Dept gives a CD to
>> each
>> manager containing their employee evaluation files in
separate documents
>> and
>> the managers have to print out the form to fill and
sign before returning
>> hard
>> copy to HR.
>>
>> We are trying to change this process to make it more
secure, expeditious
>> and
>> paperless.
>>
>> The data source with the employee data is in Excel.
After the mail merge
>> we
>> want to have a Word document that prompts or asks the
manager or employee
>> for
>> answers as they tab or go from field to field. They
have a space for
>> signature at the bottom of the document. We want them
to sign the
>> document
>> electronically by importing their signature to that
field
>> programmatically.

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>> After they are done filling out the form, and importing their signature,
>> the
>> wizard should prompt them to click on Finish and the file is then saved
>> using
>> as the "Employee Name" as the name of the saved file. The "Employee Name"
>> coming from the field at the top of the document. Also, we want the
>> document
>> to be locked when saved.
>>
>> That is what we want to do here. Any additional help would be very much
>> appreciated. I will search for Doug Robbins splitter and see if I can
>> modify
>> the VBA code.
>>
>> t0kein
>>
>>
>>
>> "Peter Jamieson" wrote:
>>
>>> For point (1), can you please tell us more about how you see the process
>>> working
>>> – what is being produced?
>>> – at what point in the process do you envisage the manager and employee
>>> signing something?
>>> – what sort of electronic signature are you thinking of?
>>>
>>> For point (2), if the Employee name is coming from your mail merge data
>>> source, you should be able to insert an additional copy of the {
>>> MERGEFIELD
>>> "Employee Name" } field in the header/footer, at least if the merge is a
>>> "Letter" type merge. If the name is being provided by a FILLIN, you can
>>> try
>>> – changing the FILLIN to an ASK. In an ASK field you specify a bookmark
>>> name for the result of the ASK, then use a REF field such as { REF
>>> employee_name } to insert the results.

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>>> – or nesting the FILLIN inside a SET, e.g.
>>>
>>> { SET employee_name "{ FILLIN "whatever" }" }
>>>
>>> and using { REF employee_name } to insert the results.
>>>
>>> If you want to name the output file using the employee
name you will
>>> probably need to use some VBA – if you go to Google
groups and search
>>> this
>>> newsgroup for Doug Robbins splitter you should find
some VBA code that
>>> will
>>> help.
>>>
>>> Peter Jamieson
>>> "t0kein" <anonymous@xxxxxxxxxxxxxxxxxxxxxxxxxxxx> wrote
in message
>>> [news:00cb01c53950\\$88a0be90\\$a601280a@xxxxxxxxxxx](mailto:news:00cb01c53950$88a0be90$a601280a@xxxxxxxxxxx)
>>> >
>>> > We are trying to modify a Performance Evaluation
template
>>> > form in Word 2000. The employee data is merged into
the
>>> > form from an excel spreadsheet. The mail merge
process
>>> > works fine but we are wondering if there is a way to
do
>>> > the following:
>>> >
>>> > 1. How do we make it possible for Manager and
Employee to
>>> > fill and sign the form electronically without having
to
>>> > print it out. This would minimize chances of it
falling
>>> > into the wrong hands.
>>> >
>>> > 2. Is it possible to make the text in the Employee
Name:
>>> > field either repeat in the footer of the document,
or be
>>> > automatically filled in as the name of the document.
This
>>> > is so as to distinguish the document from others.
>>> >
>>> > At this point we are unable to proceed without a
solution
>>> > to these issues. I appreciate any insights you may
have.

