

AutoCrat-Generate and Send Certificates as pdf attachments

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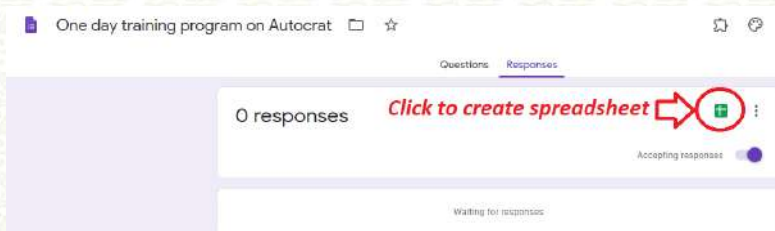
School of Mathematical Sciences
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Nanded

Pedagogical Training for Teachers on Tools for Teaching Learning and
Evaluation
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- Autocrat is a multi-purpose document merge tool that allows you to take data from a spreadsheet and merge it into a document via a template.
- Automate the creation and sharing of personalized documents with autoCrat.
- We can send the documents as email attachments.
- Create template in Google Slides for Autocrat.
- Flexibility in creating your own merge tags with << ... >>
- Can be attached to a new google form so that whoever submit the form can get certificate
- Can be attached to already collected responses to send certificates

Attaching to new google form



- Create your google form. Once it is done, click on spreadsheet symbol
- Now a spreadsheet opens with columns as your questions

Installing AutoCrat Add-on



One day training program on Autocrat (Responses) ☆ 📄 ☁

File Edit View Insert Format Data Tools Form Add-ons Help [Last edit was yesterday at 4](#)

100% | \$ % .0 .00 123 | Default

Timestamp

A	B	C
Timestamp	Email Address	Name of the pr
7/4/2020 16:47:39	surendra.phd@gmail.com	Dr. B. Surendr

Document add-ons

Autocrat

Document Studio

Mail Merge with Attachments

Remove Duplicates

Versature for Sheets

Get add-ons

Manage add-ons

- Click on Add-ons and select Get Add-ons
- I have already installed AutoCrat, so its visible there

Installing AutoCrat Add-on



Search: Autocrat

G Suite Marketplace

Autocrat

Autocrat

Works with Sheets

Lucidchart

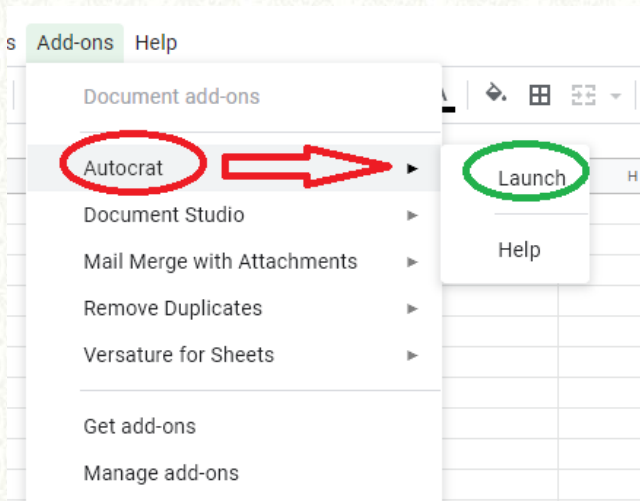
Autocrat

AwesomeTable

Doctopus

Click and install Add-on

- Search "Autocrat" and click to install.



- Add-ons–AutoCrat-Click to Launch



AutoCrat



No merge jobs set up yet

Click to begin






AutoCrat ×

Certificates


1. Name your merge job

Job name

*Give your job a useful name for easy reference

[Help Guide](#)





AutoCrat

Certificates

2. Choose template

New! Now you can choose Google Slides as a job template from Drive.

From drive **Create example**

No template selected yet

Currently selected template

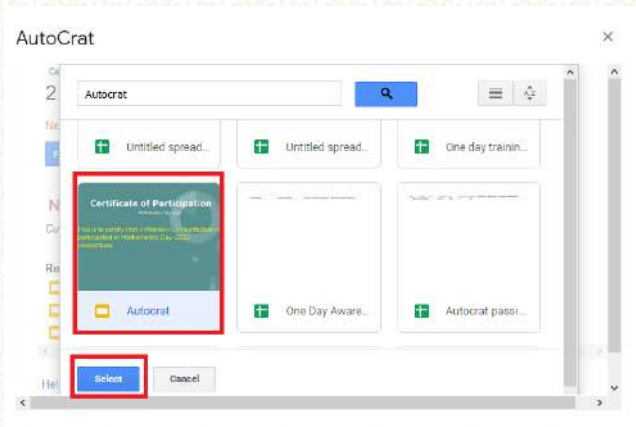
Recently used templates

- Autocrat (View | Use) *—If used earlier*
- sample (View | Use)
- sample certificate (View | Use)
- sample certificate1 (View | Use)

Help Guide **Cancel** **SAVE** **Back** **Next**

- We have a custom certificate created on google slide
- Click on select "From Drive"

Choosing our own template



- Select the template which we have already created on google slide

Mapping tags to names in the sheet



AutoCrat

Certificates

3. Map source data to template

Merge tab: Form Responses 1 | Header row: 1 | First data row: 2

Standard	<< Name >>	maps to column	Name of the participant
Standard	<< Institution >>	maps to column	Name of the Institution

Timestamp
Email Address
Name of the participant
Name of the Institution

Cancel SAVE Back Next

- If merge tags and column names are same, then auto mapping will be done
- If they are different, we can map them by selecting from drop-down

Name and format of the individual certificate



AutoCrat

Certificates

4. File settings

File name

<<Name of the participant>>_certificate

*Tell AutoCrat how to name each file it creates. You can use <<TAGS>> aligned to merge sheet column headers to merge in source data, only supported in multiple output mode.

Type

PDF

Google Slides

PDF Multiple output mode (classic mode) Single output mode

Help Guide

Cancel SAVE Back Next

- Enter appropriate name, we can use merge tags here
- Click on small triangle on blue strip and click the required merge tag and paste it on name field.
- Choose to send as a Google Slide or as a pdf

Select the folder to save certificates



AutoCrat



Certificates

5. Choose destination folder(s)

Autocrat



*All merged docs will go into these folders

Help Guide

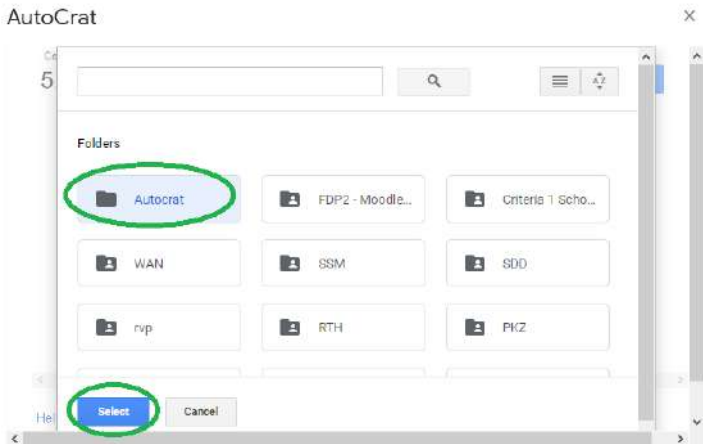
Cancel

SAVE

Back

Next

Select the folder to save certificates



- Select the folder which you have already created in your google drive.
- If not created a folder, create first then apply this step.



AutoCrat

×

Certificates

6. Add dynamic folder reference (optional)

+ Reference

*Select a column that will contain a valid folder ID when this job runs

Help Guide

Cancel

SAVE

Back

Next

- Skip and press next



AutoCrat

Certificates

7. Set merge condition (optional)

+ Add condition

No conditionals set up yet. Click "Add condition".

*Only rows that meet the above conditions will be merged.
Enter a specific value, NULL (empty) or NOT NULL (not empty)

Help Guide

Cancel

SAVE

Back

Next

- Skip and press next



AutoCrat

Certificates

8. Share docs & send emails

*Only available for Google Apps accounts, not Gmail users

To <<Email Address>>

Cc

Bcc

Reply To

Dear <<Name of the participant>>, here is your certifica

Congratulation, please find your certificate as an attachment.

Cancel SAVE Back **Next**

[Help Guide](#)

- Enter appropriate merge tag in "To" field (as Email)
- Write suitable subject, if necessary with merge tags



AutoCrat



Certificates

9. Add/remove job triggers

Run on form trigger

Yes No



Click Yes if need to send immediately after form submission

Run on time trigger

Yes No

Run every

one hour

one hour

two hours

three hours

four hours

six hours

twelve hours

twenty-four hours



Sends the certificate at specified hours

Cancel

SAVE

Back

Run, Edit, preview the Job



AutoCrat

Existing Jobs

Certificates

Run job

Edit

Preview

NEW JOB

[Help Guide](#) [Manage triggers](#)

The screenshot shows the AutoCrat web interface. At the top, there's a title bar with 'AutoCrat' and a close button. Below it, the section 'Existing Jobs' contains a list of jobs. The first job is 'Certificates'. To its right is a toolbar with several icons: a play button (circled in red with a red arrow pointing to it and a 'Run job' tooltip), an edit icon, a trash icon, a refresh icon, and a list icon. Above the 'Edit' icon is a red speech bubble containing the word 'Edit'. Above the 'Preview' icon is a red speech bubble containing the word 'Preview'. At the bottom right of the job list area is a red button labeled 'NEW JOB'. At the bottom left, there are two links: 'Help Guide' and 'Manage triggers'.

