Minisoft[®] eFORMz[™]

Version 10.05

Minisoft, Inc. 1024 First Street Snohomish, WA 98290 U.S.A.

1-800-682-0200 360-568-6602 Fax: 360-568-2923 Minisoft Marketing AG Postfach 107 Ch-6048 Horw Switzerland

> +41-41-340 23 20 info@minisoft.ch www.minisoft.ch

Internet access: sales@minisoft.com support@minisoft.com http://www.minisoft.com http://support.minisoft.com

Disclaimer

The information contained in this document is subject to change without notice.

Minisoft, Inc. makes no warranty of any kind with regard to this material, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. Minisoft, Inc. or its agents shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishings, performance, or use of this material.

This document contains proprietary information which is protected by copyright. All rights are reserved. No part of this document may be photocopied, reproduced, or translated to another programming language without the prior written consent of Minisoft, Inc.

©2015 by Minisoft, Inc. Printed in U.S.A.

eFORMz 10.05 - March 2015

All product names and services identified in this document are trademarks or registered trademarks of their respective companies and are used throughout this document in editorial fashion only and are not intended to convey an endorsement or other affiliation with Minisoft, Inc.

License Agreement

READ CAREFULLY BEFORE INSTALLING THE MINISOFT SOFTWARE APPLICATION:

CUSTOMER: THE MINISOFT SOFTWARE APPLICATION ("PRODUCT") THAT YOU PURCHASED CONTAINS COPYRIGHTS, TRADE SECRETS, TRADE MARKS, AND OTHER INTELLECTUAL PROPERTY RIGHTS BELONGING TO MINISOFT, INC. ("MINISOFT"), HAVING ITS PRINCIPAL OFFICES LOCATED AT 1024 FIRST STREET, SNOHOMISH, WASHINGTON, 98290, U.S.A. THE PRODUCT MAY BE INSTALLED, COPIED, DISPLAYED, EXECUTED, PERFORMED, OR USED IN ANY OTHER FASHION ONLY IN ACCORDANCE WITH THE TERMS OF THIS LICENSE AGREEMENT ("AGREEMENT" OR "LICENSE"). THE TERMS "YOU" OR "YOURS" ARE SOMETIMES USED HEREIN AND MEAN RESPECTIVELY CUSTOMER OR CUSTOMER'S.

SOMETIMES EACH OF MINISOFT AND CUSTOMER IS REFERRED TO HEREIN AS A "PARTY," AND SOMETIMES THEY ARE COLLECTIVELY REFERRED TO AS THE "PARTIES."

YOU MAY NOT INSTALL, COPY, DISPLAY, EXECUTE, PERFORM OR USE IN ANY OTHER FASHION THE PRODUCT EXCEPT IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF YOU INSTALL, COPY, DISPLAY, EXECUTE, PERFORM OR OTHERWISE USE ANY PART OF THE PRODUCT, YOU ARE DEEMED TO HAVE ACCEPTED AND YOU ARE BOUND BY ALL THE TERMS AND CONDITIONS OF THIS MINISOFT LICENSE AGREEMENT ("AGREEMENT"). IN ORDER TO USE THE PRODUCT, YOU MAY BE REQUIRED TO OBTAIN A UNIQUE CODE OR CODES FROM MINISOFT TO ENABLE INSTALLATION, COPYING, DISPLAY, EXECUTION, PERFORMANCE AND OTHER USE OF THE SOFTWARE PRODUCT.

IF YOU DO NOT ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT, YOU ARE PROHIBITED FROM INSTALLING, COPYING, DISPLAYING, EXECUTING, PERFORMING, OR USING IN ANY OTHER FASHION THE PRODUCT. VIOLATION OF THIS AGREEMENT (1) CONSTITUTES INFRINGEMENT, MISAPPRO-PRIATION AND CONVERSION OF MINISOFT'S COPYRIGHTS, TRADE SECRETS, AND OTHER INTELLECTUAL PROPERTY RIGHTS, (2) WILL SUBJECT THE INFRINGER TO SIGNIFICANT CIVIL LIABILITIES FOR DAMAGES (INCLUDING WITHOUT LIMITATION STATUTORY DAMAGES) AND OTHER REMEDIES AND LIABILITIES, AND (3) MAY CONSTITUTE VIOLATION OF CRIMINAL LAWS.

IF A CUSTOMER IS PURCHASING AN UPGRADE FOR AN EARLIER VERSION OF THE PRODUCT, THEN THIS AGREEMENT SHALL SUPERSEDE THE TERMS AND CON-DITIONS OF THE LICENSE AGREEMENT THAT APPLIED TO THE EARLIER VERSION AS TO THE USE OF THE UPGRADE PRODUCT AS OF THE DATE OF INSTALLATION OF THE UPGRADE.

NOW, THEREFORE, in consideration of the foregoing provisions and the terms and conditions herein contained and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the following terms and conditions apply:

A. License Grants

 Upon MINISOFT's receipt from the Customer of the one-time license fee and further subject to the other terms and conditions herein, MINISOFT grants the Customer a non-exclusive and non-transferable perpetual license: (a) to install and use the Product on only one host computer or business server in the Customer's business organization; and (b) to install the client portion of the Product on a network server for access by more than one personal computer and on any personal computer client accessing the host server program.

2. You may not: (a) allow access to or use of the Product to anyone outside of your organization; (b) decompile, reverse engineer, decrypt, disassemble, or otherwise attempt to copy or replicate the source code; (c) modify or translate those portions of the Product that are provided in an object or source code form, or alter, merge, modify, reverse engineer or adapt the Product in any way including disassembling or decompiling; (d) copy, loan, rent, lease or sublicense, assign, convey, sell, mort-gage, pledge, dispose or in any other manner transfer to a third-party any part of or all of the Customer's rights and obligations under this Agreement or in the Product; or (e) otherwise copy, distribute, rent, loan, disseminate, publish, sell or transfer any portion of the Product in any way inconsistent with or contrary to the terms and conditions of the Agreement.

3. Any attempt to violate any prohibitions described in this Agreement shall be considered a material breach of this Agreement, and no attempt to violate section 2(c) or 2(d) in the immediately preceding paragraph shall have any effect, and any prohibited act described therein shall be void and of effect if made by the Customer.
4. You may make one copy of the Product for use as a backup copy (the "Copy") provided that: (i) the Copy includes all notices of copyright and all other proprietary rights appearing in and on the Software Product; (ii) the Copy and the original Product are not in use at the SAME time; (iii) Customer establishes a procedure for accounting for the Copy at all times; and (iv) Customer destroys or returns to MINISOFT the Copy when it is no longer required or when the license grants made hereunder are terminated for any reason, whichever occurs first.

5. This Agreement grants to the Customer a license for use of the Product on the terms and conditions set forth in this Agreement; and (ii) the Customer may not install, copy, perform, execute, display, or use in any other fashion the Product except in accordance with the terms and conditions of this Agreement. By any use of any element of the Product, the Customer shall be deemed to have accepted and be bound by all the terms and conditions of this Agreement.

6. MINISOFT retains and reserves all rights to the Product. Nothing contained herein shall be deemed to convey to the Customer any title to, or an ownership interest in, the Product or any of the intellectual property rights contained in the Product. Upon termination of this Agreement, all rights granted to the Customer herein shall automatically revert to MINISOFT.

B. Termination

The license grants made hereunder shall automatically terminate on the date of any breach by the Customer of any of the terms and conditions of this Agreement. In any such termination, you shall discontinue using the Product. You further agree to return the Product to MINISOFT or destroy all components of the Product and to certify in writing that the Product is no longer in use and that you have kept no copies of the Product. In any such termination of the license grants, none of MINISOFT's rights in law or equity shall be barred, discharged, released, or otherwise impaired by such termination, and MINISOFT reserves all such rights described herein. C. Confidential Information

The Product also contains MINISOFT's commercially valuable, proprietary and confidential information and trade secrets (collectively "Confidential Information"). You are obligated to preserve and hold in confidence any Confidential Information and may not use any of it except in accordance with the terms and conditions of this Agreement. Confidential Information shall not include what is already public at the date of its disclosure or what later becomes lawfully public through no fault or responsibility of the Customer.

D. Limited Warranties and Limitations on Damages and Remedies.

1. Only the limited warranties expressly described in this section are made to the Customer purchasing this Product. No warranty of any kind, whether express or implied, is made to any third-party or other transferee or successor of the Customer.

2. MINISOFT warrants that it has the right to grant the licenses contained in this Agreement.

3. MINISOFT warrants that this product will execute its programming instructions when properly installed on a properly configured computer for which it is intended. MINISOFT makes no warranty of any kind, implied or express, that the Product will meet Customer's requirements or that the Product will be uninterrupted or error-free 4. MINISOFT, Inc. warrants the media upon which this Product is recorded to be free from defects in materials and workmanship under normal use for a period of 90 days from the date of purchase. During the warranty period MINISOFT will replace media that prove to be defective. Customer's exclusive remedy for any media that proves to be defective shall be to return the media to MINISOFT for replacement.

5. MINISOFT' only obligation, liability and/or remedy, with respect to the warranties set forth in this Agreement shall be one of the following, which MINISOFT shall have sole discretion to choose: (1) as described above, to provide replacement media (whether in the form of the current release or otherwise) for the Product; (2) to

replace, without charge, the Product with a functionally equivalent software product; or (3) to refund the applicable license fees paid to MINISOFT by Customer. These are the sole and exclusive remedies for any breach of warranty.

6. MINISOFT shall have no obligation, liability or any other kind of responsibility for the costs of restoring any destroyed or defective data, installation of replacement media, or software conversion work made necessary by replacement media, even if MINISOFT had been specifically informed by Customer of the possibility or probability of any such consequences. During the ninety (go) days warranty period for the media, MINISOFT will replace, without charge, on an exchange basis, any media which is not as warranted. Customer must return the defective item postpaid to MINISOFT, postmarked within the time period stated above. Customer must either insure the defective item being returned or assume the risk of loss or damage in transit. Any claim under the above warranty must include a copy of Customer's receipt or invoice or other proof of the date of delivery.

7. Year 2000 Warranty. MINISOFT warrants that the Product will accurately process date/time data (including, but not limited to, calculating, comparing, and sequencing) from, into, and between the twentieth and twenty-first centuries, and the years 1999 and 2000 and leap year calculations, in accordance with the Product's documentation BUT ONLY to the extent that other technology and systems (e.g., software and operating systems, hardware and firmware) used in combination with the Product properly exchanges date/time data with it. In addition to the limitations of liability and remedies described above in this Section, the Year 2000 warranty made herein is made only for ninety (90) days after the date of delivery of the Product and only if any noncompliance is discovered and made known to MINISOFT in writing within such ninety (90) days. The Year 2000 warranty expires after such ninety (90) day period and shall not extend to any events occurring after the expiration date. 8. MINISOFT makes no other warranty, expressed or implied, with respect to the Product.

9. NOTICE: THE WARRANTIES, OBLIGATIONS AND LIABILITY OF MINISOFT AND THE RIGHTS AND REMEDIES OF CUSTOMER SPECIFICALLY SET FORTH IN THIS AGREEMENT ARE THE CUSTOMER'S EXCLUSIVE REMEDIES. MINISOFT DISCLAIMS, AND CUSTOMER HEREBY WAIVES, DISCHARGES AND RELEASES MINISOFT, ITS OFFICERS, DIRECTORS, EMPLOYEES AND AGENTS, FROM ANY AND ALL (1) OTHER WARRANTIES, OBLIGATIONS, OR LIABILITIES AND (2) RIGHTS, CLAIMS, CAUSES OF ACTIONS, EXPRESS OR IMPLIED, ARISING BY LAW OR OTHERWISE IN CONNECTION WITH, REGARDING, OR ARISING FROM THE PRODUCT OR ANY RELATED SOFTWARE, TANGIBLE OR INTANGIBLE ITEMS OR SERVICES PROVIDED UNDER THE AGREEMENT (INCLUDING, WITHOUT LIMITATION, ALL DOCU-MENTATION SUPPLIED WITH THE PRODUCT). THE WAIVER, DISCHARGE AND RELEASE INCLUDE, BUT ARE NOT LIMITED TO: (1) ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A SPECIFIC PURPOSE; (2) ANY IMPLIED WARRANTY ARISING FROM COURSE OF PERFORMANCE, COURSE OF DEALING, OR USAGE OF TRADE; AND (3) ANY OBLIGATION, LIABILITY, RIGHT, CLAIM, OR REMEDY, WHETHER IN TORT, CONTRACT, OR OTHERWISE. IN NO CASE SHALL MINI-SOFT BE LIABLE FOR ANY INCIDENTAL, INDIRECT, SPECIAL, CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, LOSS OF USE, REVENUE, PROFIT, OR DATA), PUNITIVE DAMAGES, EXEMPLARY OR OTHER STATUTORY DAMAGES, EXPENSES, COSTS (INCLUDING ATTORNEY FEES). IN ADDITION, IN NO CASE SHALL MINISOFT'S LIABILITY E CAMAGES, EXEMPLARY OR OTHER STATUTORY DAMAGES, EXPENSES, COSTS (INCLUDING ATTORNEY FEES). IN ADDITION, IN NO CASE SHALL MINISOFT'S LIABILITY EXECUTION THE FOR THE PRODUCT.

E. Updates

Customer is entitled to updates and enhancements to licensed software if under a current Minisoft software update and subscription service. The cost of the update and subscription service will be 20% of the purchase price of the licensed software. The update and subscription service is for twelve (12) months and can be renewed at the customer's discretion.

F. Support Services

A customer that has purchased annual support entitles them to any and all software updates for their licensed product(s) as well as technical support via phone and email. Software Updates are available from our web site, www.minisoft.com. Included with the purchase of support is the use of our Toll Free 800 number, and support email. Days and Hours of support coverage are Monday through Friday 7:30am (Pacific) until 5:00pm (Pacific). When support is purchased or renewed, an update may be downloaded from the Minisoft Website. In cases where support has expired, back-support is charged to bring the support account current. Any supplemental software of provided to you as part of the Support Services shall be considered part of the SOFTWARE PRODUCT and subject to the terms and conditions of this License Agreement.

G. Miscellaneous

1. Governing Law. This Agreement is made for the sole benefit of the parties hereto, and there are no third party beneficiaries to this Agreement. This Agreement shall be interpreted under the laws of the State of Washington, notwithstanding the application of any jurisdiction's choice-of-law rules to the contrary.

 Independent Contractors. No agency, partnership, joint venture, or employer-employee relationship is created hereby, and neither party nor any of its agents or employees shall have any authority of any kind to bind the other party in any respect whatsoever. Each party is an independent contractor to the other party.
 No Assignment by Customer. This Agreement shall be binding upon and inure to the benefit of MINISOFT and any successors and assigns. Customer shall have no right to assign or otherwise transfer its rights or obligations under this Agreement except with the prior written consent of MINISOFT, which MINISOFT in its sole discretion and for any reason or no reason provide or withhold.

4. Entire Agreement. This Agreement contains the complete understanding between the parties and shall as of the date the Product is first installed supersede all other agreements, whether they are written or oral, between the parties concerning the particular subject matter. The language of this Agreement shall for all purposes be construed as a whole, according to its fair meaning, not strictly for or against either party, and without regard to the identity or status of any person who drafted all or any part of it. No purchase order or any other purchasing instruments issued by Customer, even if such purchase order or other purchasing instrument provides that it takes precedence over any other agreement between the parties, shall be effective to contradict, modify, delete from or add to the terms of this agreement in any manner whatsoever.

5. Severability. In the event that any one or more provisions of this Agreement is found by a court of competent jurisdiction to be unenforceable or invalid, then notwithstanding any such finding the remainder of this Agreement shall remain in full force and effect, and such provision that is found to be unenforceable or invalid shall be deemed severed.

6. Waiver. Neither party's right to require performance of the other party's obligations hereunder shall be affected by any previous waiver, forbearance, or course of dealing, nor shall any waiver or forbearance or other course of dealing at any time with respect to any term or condition in this Agreement be effective unless evidenced in writing signed by the waiving party as to such waiver, forbearance or other course of dealing. No waiver or modification of this Agreement or any covenant, condition or limitation herein contained shall be valid and no evidence of waiver or modification shall be offered or received in evidence in any proceeding, arbitration or litigation between the parties hereto arising out of or affecting this Agreement or the rights or obligations of the parties hereunder, unless such waiver or modification is in writing duly signed by both parties.

7. Headings, Sections - The various headings in this Agreement are inserted for convenience only and shall not affect the meaning or interpretation of this Agreement or any Section or provision hereof.

8. Disputes; jurisdiction and venue. Customer and MINISOFT consent to personal jurisdiction, subject matter jurisdiction, and venue in the state and/or federal courts sitting in King or Snohomish Counties, State of Washington. Any action relating to this Agreement must be brought in the state or federal courts located in King or Snohomish County, Washington.

9. Attorney's Fees. In the event legal action is brought by either party to enforce any of the provisions of this Agreement, the prevailing party shall recover its reasonable attorney's fees, costs, and expenses, including but not limited to fees, costs and expenses of collecting any judgment.

10. Export. The export of this product is restricted by U.S. export regulations.

11. GOVERNMENT RESTRICTED RIGHTS. The Software Product and documentation are provided with restricted rights. Use, duplication or disclosure by the Government is subject to restrictions as set forth in subparagraph (c) (2) (ii) of the Rights in Technical Data and Computer Software clause at DFARS 252. 227-7013 or subparagraphs (c) (1) and (2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable. Contractor/manufacturer is MINISOFT, INC., 1024 FIRST STREET, SNOHOMISH, WASHINGTON, 98290, U.S.A

Table of Contents

Introduction: Overview

The eFORMz Components	
eFORMz Composer	
eDIRECT	-
eFORMz Director Toolkits	-
eReader	-
OnDemand Printing	•

Chapter 1: Installation Instructions

Printer Recommendations	
Black/White Printer	
Color Printer	
Label Printers	7
eFORMz Client Install	8
Recommendations/Requirements	8
Installation / Upgrade Instructions	
Web Install	
Host/Server Installation	a
	j
iSeries/AS400 Host Install	9
Recommendations/Requirements	
Installation and Upgrade Instructions	
Optional Custom eFORMz Job Queue	-
Optional Optimizing	
Upgrade Instructions	
	14
HPe3000 Install	15
Recommendation	
NetPrint Installation Instructions	-
Configure Spooled Devices	
Installing eFORMz on a Windows Operating System	16

Jnix Environment Install	17
Requirements	17
Installation and Upgrade Instructions	17
Windows Host Environment Install	19
Recommendations	
Installation Instructions	-
Web Install	19
Configuring your Network Printers	20
LPD Communication	21
STEP 1: Enable TCP/IP Print Server for LPD Communication	21
STEP 2: Starting the TCP/IP Print Server Service	22
STEP 3: Configuring the eFORMz Port Monitor	

Chapter 2: eFORMz Composer

Introduction Illustration 1: eFORMz Single Page Project	
Illustration 2: eFORMz Two Page Project	
eFORMz Composer Tour	29
Getting Started with eFORMz Printing the Sample Project	

Chapter 3: Creating an eFORMz Project File

Capturing a Print File / Spoolfile STEP 1	
Windows Server	
AS400 Data Capture	-
HPe3000 Data Capture	
UNIX Environment Data Capture	41
Creating an eFORMz Project	
STEP 2	

Form Overlay STEP 3	
Captured Form Overlay	50
Dynamic Form Overlay	-
Project File Printing	

Chapter 4: eFORMz Composer Data Customization

Customizing your data output	
Creating an eFORMz Variable	-
Positional Data Block Variables	
Node Data Block Variables	-

Chapter 5: Host Project Transfer

iSeries/AS400	63
UNIX	65
Script Command Options	71
Windows	72

Appendix A: Alternate Form Template Creation

Creating a Form Template File	
for eFORMz	
Windows 2003 Print Driver	

Index

Introduction

Overview

The Minisoft eFORMz product is designed to provide users with a flexible and dynamic tool for creating custom forms, documents, and reports. eFORMz is written in 100% Java and can run on any platform on which Java has been ported.

eFORMz operates on any computer platform that supports JAVA including:

- Windows
- Unix
- Linux
- iSeries/AS400
- HPe3000*
- HP/UX
- ♦ AIX
- Sun/Solaris
- Open VMS

eFORMz is also designed to integrate with output from virtually any software application. Supported applications include: Manhattan Associates, QAD, JDA, STW, Harris, ManMan, SAP, INFOR, McKesson, Fiserv, JDE, Oracle, Growth Power, Jobscope, MAPICS, Microsoft Dynamics (AX/NAV/GP), EPICOR, Lawson, NetSuite, HighJump WMS and many more.

*NOTE: Due to the limitations of JAVA on the HPe3000 we are recommending to our HPe3000 users to perform the eFORMz/eDIRECT process on a Windows, Linux, or Unix platform. Contact your Minisoft sales or support representative (support@minisoft.com) for additional information.

The eFORMz Components

eFORMz consists of multiple components, called *Client Tools*. The Client Tools function in different methods to support eFORMz for the designing and electronic forms generation. Below is a brief explanation of each of these components.



eFORMz Composer

The eFORMz Composer manages your form designs and electronic forms output. Data can be managed and formatted using variables, rules, and formatting options such as lines per inch, characters per inch, character sets and font style.

eDIRECT

eDIRECT processes output from eFORMz and directs it to one or more different output destinations including EMAIL, PRINT FILE, and FAX. Using eDIRECT, merged print files from eFORMz can be redirected to one or more of the above output destinations simultaneously.

Cross-Reference: For more details, consult the eDIRECT/eDIRECT PLUS Manual.

Introduction

eDIRECT+

eDIRECT+ is a feature of eDIRECT with added features and benefits for clients interested in producing HTML output for emailing (i.e. order or ship confirmations).

Cross-Reference: For more details, consult the eDIRECT/eDIRECT PLUS Manual.

eFORMz Director Toolkits

The Director is an operating system independent Print Monitor. The Director Toolkit is available for Windows, Linux/Unix, and iSeries/AS400 host systems. It creates a user-friendly environment to configure the eFORMz job process on your host system. With the Director Toolkits, you can create and modify your form and data merge processes. Each Director Toolkit configuration can have a separate log file.

Cross-Reference: For more details, consult the Director Manual.

eReader

eReader, the eFORMz Document Viewer, is included with the eFORMz installation. Smaller and much faster than Adobe Reader, eReader allows eFORMz users to efficiently print, save and email eFORMz Documents (.efd).

Cross-Reference: For more details, consult the eFORMz - eReader Manual.

OnDemand Printing

The OnDemand Print utility, allows one to enter data as a value via keyboard entry and/ or a scanner. It also includes an option to use a browse button to select file(s) from specific folders.

Cross-Reference: For more details, consult *Appendix C: OnDemand Print Utility* from the *eFORMz Reference Manual.*

Chapter 1

Installation Instructions

CHAPTER 1

The eFORMz install contains all the necessary components for installing eFORMz on the client and host systems. To install on a host system you must first install eFORMz on a client work station (Windows) and then proceed with installation to a host system. To install on the host systems you will utilize the eFORMz Composer client utility. The following instructions will explain how to install the client and host system installs.

For clients intending to use eFORMz for printing we have the following recommendations for printers processing eFORMz output.

Printer Recommendations

eFORMz supports the following printer languages: PCL 5, PostScript, XML, AFPDS-IPDS, Zebra ZPLII, SCS, Windows GDI and SATO SBPL. eFORMz supports popular printer manufacturers such as Hewlett Packard, Lexmark, Canon, Toshiba, Ricoh, IBM, Dell, Brother, Monarch and Datamax. Minisoft recommends the following for processing eFORMz output on either a black/white printer, color, or label printers.

Black/White Printer

- HP LaserJet or equivalent with PCL 5e or greater
- Duplex printer for projects requiring duplex printing
- MICR cartridge for projects requiring a MICR line (i.e.:Payroll/Accounts Payable checks)
- 8-16MB Memory. We recommend 16MB of memory for projects that contain large amounts of graphics, duplex processing, etc.

Color Printer

eFORMz Output Type	Printer	Operating System
Image	Color Inkjet / Laser Printer	Windows Operating System
PCL	PCL 5c Laser Printer required { i.e.: HP LJ3800dn }	Windows, HP9000, iSeries\ AS400, Sun, Linux, Windows

- Duplex printer for projects requiring duplex printing
- Black MICR cartridge for projects requiring a MICR line
- 64MB Memory
- 16 pages per minute color

Some color printers print 16 pages per minute black/white but only 4 pages per minute color. Take note of these speeds when choosing a LaserJet printer, otherwise, delays in the printing process may occur.

Label Printers

eFORMz supports Zebra XML and ZPLII compatible printers. eFORMz also supports SATO SBPL and Windows GDI (Graphic Image by Driver) for printing NCR 2ST[™] thermal labels, Intermec and Toshiba.

TIP: For detailed printer recommendations please contact your Minisoft support representative at support@minisoft.com or (800) 682-0200.

eFORMz Client Install

Recommendations/Requirements

We recommend a PC with the following minimal requirements:

- 2 GB RAM or greater
- 2 GHz or faster
- 1024x768 with 16 bit resolution

Installation / Upgrade Instructions

Web Install

From our Minisoft website (www.minisoft.com) please register and download the latest eFORMz install. Once the setup file has been downloaded:

- 1. Double click the eFORMz executable *eFORMz_full.exe* and follow the on-screen instructions. Default install directory is the C:\Minisoft\eFORMz_6\ folder.
- **NOTE:** To install the eFORMz components on your host system (Unix, Linux, iSeries/AS400, RS6000, HP/UX, Solaris platform) you must first install eFORMz on your PC. Once the PC install is complete host installs can now be performed.

NOTE: eFORMz requires Java version 1.7 which is automatically installed with the PC install. The PC install will not overwrite your system Java but installs Java in a subfolder under the C:\Minisoft\eFORMz_6\ root folder.

Host/Server Installation

iSeries/AS400 Host Install

Recommendations/Requirements

We recommend the following for AS400's processing the eFORMz merge:

- OS Version 5 / release level 2 (or greater)
- Java Release 1.6 (or greater)
- Recommend creating a holding PrintQ for spoolfiles awaiting eFORMz processes.

Note: For updates to your AS400 Java release please contact your software vendor.

Installation and Upgrade Instructions

The following instructions assume you have already installed the eFORMz Composer on your PC.

- 1. From the eFORMz Composer Menu bar select *Host Tools > AS400 > Install eFORMz*.
- 2. The AS400 Login dialog box will appear. Enter your *host IP address, user name*, and *password*.

AS/400 Login			x
AS/400 Address	172.29.144.39		-
User Name	u0009887		-
Password	•••••		
	Connect	Close	

- 3. Once complete click *Connect*.
- 4. The AS400 Install dialog box will display. By default eFORMz will transfer the needed jar files from the specified directory in the *Install From* field:

Default: C:\Minisoft\eFORMz_6\

The 'Install to' directory can be specified by clicking the browse button for available

CHAPTER 1

Queues on your AS400 system. By default eFORMz installs into the following directory off root:

/minisoft	
AS/400 Install	×
Install from: \minisoft\eFORMZ_6	
Install to: /minisoft	
Clear remote "jars" subfolder before copy	
Include local "fonts" subfolder in copy	
<u>o</u> k	<u>C</u> ancel

Options include:

Clear remote "jars" subfolder before copy Default checked. Clears the /minisoft/jars/ folder of any default eFORMz .jar files.

Include local "fonts" subfolder in copy

Copies the font files located in the following default directory \Minisoft\eFORMz_6\ fonts to the host directory on the AS400.

Once complete click OK.

5. The installation progress bar will display:



6. Installation is now complete.

Optional Custom eFORMz Job Queue

The AS400 is normally delivered with a maximum batch job limit of one, meaning that only one job can execute at a time. Since the eFORMz Print Monitor runs as a job (efzPM), if executed and left running no other jobs will run. Instead they will remain in a 'jobg' state until the eFORMz PM is terminated.

One option is to increase the maximum job setting value for QBATCH to a value greater than one. If, however, your jobs require single-thread processing then this may not be the solution for you.

Another method, *which we recommend*, is to create a separate job queue to run the eFORMz Print Monitor. To do so:

1. Create an eFORMz Library. At the command line enter the following:

CRTLIB

(To modify: WRKLIB EFZLIB)

Specify the following options:

Name EFZLIB Type *PROD Text eFORMz Library

2. Create an eFORMz Job Queue. At the command line enter the following:

CRTJOBQ

(To modify: WRKJOBQ)

Specify the following options:

Job Name EFZJOBQ Library EFZLIB Text eFORMz Job Queue

3. Create an eFORMz Job Description. At the command line enter the following:

CRTJOBD

(To modify: WRKJOBD)

Specify the following options:

Job desc.	EFZJOBD
Library	EFZLIB
Job queue	EFZJOBQ
Library	EFZLIB

4. To determine the next available sequence number enter the following at the command line:

DSPSBSD QBASE

Select option #6 (Job Queue Entries) and check for an unused sequence number.

CHAPTER 1

5. Attach a job queue to an active subsystem. At the command line enter the following:

ADDJOBQE

(To modify: CHGJOBQE)

Specify the following options:

QBASE
*LIBL
EFZJOBQ
EFZLIB

Max active jobs 1(or number of batch jobs permitted to execute)Seq. number _____(enter value from the previous step)

6. Create a new eFORMz User. At the command line enter the following:

WRKUSRPRF EFORMZ

Specify the following options:

Option 1 User EFORMZ Description eFORMz User Password { password } Type of User *SYSOPR {System Operator}

Note: We recommend the minimal security level to be *System Operator.

7. Modify eFORMz Login Profile.

Login as new user (EFORMZ) and make the following changes:

Option	1	(user task)
Option	9	(change your user profile)
Option	F10	(additional parameters)
Job description	EFZJOBD	•
Library	EFZLIB	

Optional Optimizing

Java applications are interpreted much like "Basic" applications. Interpreted programming languages are typically slower to execute than 'compiled' applications. The AS400 has an application that converts Java interpreted applications to native (compiled) code. The command used to convert the Java application is CRTJVAPGM. This command should be run on all java applications to increase performance. As far as eFORMz, this means you will need to run this command on the three supplied eFORMz ".jar" files. Depending on the size of your AS400, this operation may take a few minutes or a few hours. This step is optional but highly recommended as performance will be increased by a factor of 12.

To convert the AS400 eFORMz jar files that were installed on your host, enter the following at the command line:

CRTJVAPGM

MS5250 - [Default - 1] File Edit View Setup Transfer Connect Help			<u>- </u>
	PA ₁ PA ₂ PF ₁ PF ₃ PF ₇ PF	, ?	
Create Jav	a Program (CRT	JVAPGM)	
Type choices, press Enter.			
Class file or JAR file	/ <mark>minisoft/ja</mark> r	s/*.jar	
Classpath	<u>*NONE</u>		
Java developer kit version Optimization User profile Use adopted authority Replace program Enable performance collection . Profiling data	<u>*NONE</u> 30 <u>*USER</u> <u>*NO *YES</u> <u>*NOCOL</u>	10, *INTERPRET, 20, 30, 40 *USER, *OWNER *NO, *YES *YES, *NO	
F3=Exit F4=Prompt F5=Refresh F13=How to use this display Parameter CLSF required. TE		01	tom 5/037 37 000

Set the following:

Class file or JAR file: /minisoft/jars/*.jar Optimization: 30

NOTE: You may want to run CRTJVAPGM as a batch job considering it may take a considerable amount of time and CPU resources.

Upgrade Instructions

Before proceeding with an upgrade, we recommend creating a backup directory of your /minisoft account. The backup directory can easily be created using the following method from the QSHELL command:

- 1. Enter 'qsh' (QSHELL) from the command line.
- 2. To copy the directory, enter:

===> cp -R /minisoft /minisoft705

3. Results in two directories:

/minisoft /miinisoftxxx {backup}

Should you need to revert back to the original version, delete the existing and move the old directory back:

==> rm -r /minisoft ==> mv /minisoftxxx /minisoft

HPe3000 Install

Recommendation

Due to the limitations of JAVA on the HPe3000 we are recommending to our HPe3000 users to perform the eFORMz/eDIRECT process on a Windows operating system. In combination with NetPrint, Minisoft is providing an automated method to redirect your spoolfiles from the HPe3000 to print files on Windows.

Follow the instructions below to install NetPrint on your HPe3000 to monitor and automatically send spoolfiles to a Windows operating system.

NetPrint Installation Instructions

To install NetPrint on your HPe3000:

- 1. Insert the eFORMz/NetPrint CD into your CD-ROM drive.
- 2. From the Taskbar, select RUN.
- 3. Type: D:\NetPrint\NetPrint.exe (D being the letter of your CD-ROM drive) and follow the on screen instructions.
- 4 Once NetPrint has been installed, edit your NP92CONF.PUB.MINISOFT file so NetPrint will send spoolfiles to a Windows operating system.
- 5. Add the following statement to your NP92CONF file (*example only*):

```
NETPRINT D=LP AND P=3

SETVAR

QUEUE WINEFZ

NODE XXX.XXX.XXX

OPTIONS PTYPE=LPD;PURGE;TRIM;NETOPT="BSDv" {lowercase V for "BSDv"}

NETLOG

END
```

You can modify D=LP to another spool queue device or class name and/or set P=3 to another priority level. More detailed information concerning selection criteria can be found in your NetPrint manual.

QUEUE WINEFZ represents the shared print queue configured on your Windows operating system. Note, they must share the same queue name.



NODE xxx.xxx.xxx is the IP address of your Windows operating system.

Below is an optional NETOPT configuration for Windows, which changes the file name sent from the HPe3000 to Windows:

NETOPT="BSDv, BSDN!SPFNAME-!SPFDFID"

Example: {spoolfile name}-5839_{WINEFZ counter}.dat INVOICE-5839_1.DAT

Configure Spooled Devices

Setup a dummy device that serves as an output device for the HPe3000's spool queue. NetPrint can then act as a spooler process, processing the spoolfiles according to the specifications set forth in the NetPrint configuration file, NP92CONF. Configure 'dummy' spooled devices, using the following method:

Command line (preferred) - adding device/class names via SYSGEN.

:RUN IOCONFIG.PUB.SYS; INFO="AD device ID=HPTCPJD CLASS=name PATH=NONE MODE=NONE"

where device = logical device #
name = device class name (8 characters)

Samples:

```
:RUN IOCONFIG.PUB.SYS;
INFO="AD 900 ID=HPTCPJD CLASS=LJ4 PATH=NONE MODE=NONE"
:OPENQ 900
:RUN IOCONFIG.PUB.SYS;
INFO="AD 919 ID=HPTCPJD CLASS=HPDSKPAY PATH=NONE MODE=NONE"
:OPENQ 919
```

Installing eFORMz on a Windows Operating System

Once Netprint has been installed on the HPe3000 you are now ready to install eFORMz on a Windows operating system. For further instructions on installing eFORMz on Windows operating system, see *Windows Install*.

Unix Environment Install

The eFORMz host install can be installed on a Unix, Linux, HP/UX, RS6000, or Solaris environment. Follow the installation instructions below to install the eFORMz host components on one of the above environments.

Requirements

eFORMz requires the following for Unix environments processing the eFORMz merge:

• Java - Release 1.6 (or greater)

Installation and Upgrade Instructions

The following instructions assume you have already installed eFORMz on your PC. The eFORMz Composer will be used to install the needed components on your Unix system.

1. From your host machine login as Administrator (root) and create the following directory:

mkdir minisoft

2. Change the attributes of the Minisoft directory to the following:

chmod 755 minisoft

- 3. Open the eFORMz Composer on your PC and select the *HostTools* menu. From the menu selection select *Unix* > *Install eFORMz*.
- 4. The Unix logon screen will appear. Enter your *host IP address, user name*, and *password* and then click *Connect*. If using a Secure Shell account, check the *Use SSH* option and identify the *known_hosts* file if necessary.

CHAPTER 1

💩 Unix Login	×
Host Address	192.168.23.118
Host Port	22
Host Type	Automatically detect
User Name	root
Password	•••••
	✓ Use SSH
Known Hosts File	
	Use Known Hosts File
	Connect Close

5. The Unix Install dialog box displays. By default, the eFORMz_6 folder is the directory eFORMz will be selecting the installation files from. The default install directory on your host system is the *minisoft* directory under *root*.

Unix Install		×
Install from: \minisoft\eFORMZ_6		
Install to: /minisoft		
	ОК	Cancel

- 6. Click OK to start the installation process.
- 7. The Progress dialog box will display. When the installation is complete you will return to the eFORMz Composer main window.

Windows Host Environment Install

Recommendations

To run eFORMz on your Windows Server for the merge process we recommend a server with the following capabilities:

- 2GB RAM or greater
- 2 GHz or faster

For Virtual Windows environments (The below recommendations will handle 10 high speed laser printers or 20 office class laser or label printers):

- 64-bit OS with four cores
- 4 GB memory
- 100 GB disc space
- 64-bit system JAVA installed

NOTE: eFORMz requires Java version 8, which is automatically installed during the client install. This install will not overwrite your system Java but copies a 32-bit version of the release to the C:\Minisoft\ eFORMz_6\ root folder.

Installation Instructions

Web Install

From our Minisoft website (www.minisoft.com) please register and download the latest eFORMz install. Once the setup file has been downloaded to your PC:

1. Double click the eFORMz executable *eFORMz_full.exe* and follow the on-screen instructions. Default install directory is the C:\Minisoft\eFORMz_6\ folder.

Configuring your Network Printers

To avoid print interruptions and to permit print spooling to your network printers printing an eFORMz merge, make the following change:

- 1. From your *Printers and Faxes* dialog box select the network printer configured to print your eFORMz merge processes.
- 2. Select the *Advanced* tab.
- 3. From the Advanced tab select *Start printing after last page is spooled*. Click *OK*.

🖶 HP LaserJet 5	Si Properties
General Sharin	g Ports Advanced Color Management Security Device Settings
Always av	ailable
○ Available f	rom 12:00 AM 🔹 To 12:00 AM 🔹
Priorit <u>y</u> :	1
Dri <u>v</u> er:	HP LaserJet 5Si
Start p Print direc Hold misn Print spoo	rinting after last page is spooled rinting immediately tly to the printer natched documents led documents first ed documents vanced printing features
Printing [De <u>f</u> aults Pri <u>n</u> t Processor Separat <u>o</u> r Page
	OK Cancel Apply

- 4. Next, select the Ports tab and select Configure Port.
- 5. The Port Settings dialog box will display. Uncheck SNMP Status Enabled.

SNMP Status Enabled	public
SNMP <u>D</u> evice Index:	1
	OK Cancel

NOTE: If the printer is in an offline state (paper jam, user offline, out of paper, etc...) and eFORMz attempts to send print to the queue then Java complains and the file is not transmitted with the reported error in the eFORMz log. This issue started appearing with the release of Java 5. By unchecking the SNMP box, noted above for each and every printer processed by eFORMz, then the problem is goes away. Unfortunately this box is always checked when one adds a new printer device.

NOTE: Print Spooler must be restarted.

LPD Communication

The following instructions are for users sending output from one host system (i.e.: HPe3000, AS400, Unix) to a Windows operating platform where the eFORMz merge process will take place. To monitor for incoming print files from another host system follow these steps.

STEP 1: Enable TCP/IP Print Server for LPD Communication

Windows VISTA / 7 / 8

From the Start menu select:

 Next, enable the LPR Monitor in Windows Features by navigating to Start > Control Panel > Programs > Programs and Features > "Turn Windows Features on or off." Navigate to Print and Document Services, expand the menu and check the LPR Port Monitor box.



CHAPTER 1

Windows Server 2008

From Server Manager:

- 1. Click on Add Roles.
- 2. Select Print and Document Services.
- 3. Add LPD Services.

STEP 2: Starting the TCP/IP Print Server Service

Confirm that the TCP/IP Print Server Service has been started:

- 1. From your Windows Control Panel select Administrative Tools.
- 2. Select *Services*. A listing of all services running on your Windows platform will display.

Windows Vista and later: Select LPD Services.

3. Start LPD Services if not started already and select *Automatic* as the Startup Type.

Services	1		A. 1.	-			Σ
<u>F</u> ile <u>A</u> ction <u>V</u> iew	<u>H</u> elp						
Þ ➡ 📰 📴 🕻	ì 📑 🛛 🛐 📄 🕨 💷 🕪						
Services (Local)	Services (Local)	_					
	LPD Service	Name	Description	Status	Startup Type	Log On As	
	Soop the service Pause the service Restant the service Description: Enables client computers to print to the Line Printer Common (LPD) service on this server unity "COPIs and the Line Printer Remote (LPR) protocol.	Google Update Se Google Update Se Group Policy Client Health Key and Ce HomeGroup Liste HomeGroup Provi KE and AuthIP IPs Interactive Service Internet Connecti IP Helper Pietper Pietpelicy Agent KumRm for Distrib	Keeps your Google The service is respo Provides X.509 certif Makes local compu Performs networkin Enables generic inp The IKEEXT service Enables user notific Provides network a Provides tunnel con Internet Protocol se Coordinates transac	Started Started Started Started Started	Automatic (D Manual Automatic Manual Manual Manual Automatic Manual Disabled Automatic Manual Manual	Local Syste Local Syste Local Syste Local Syste Local Syste Local Syste Local Syste Local Syste Local Syste Local Syste Network S Network S	
		Link-Layer Topolo LPD Service McAfee Engine Se McAfee Framewor McAfee Kramewor McAfee McShield McAfee Task Man	Enables client comp McAfee Engine Serv	Started Started Started Started Started	Manual Automatic Automatic Automatic Automatic Automatic	Local Service Local Syste Local Syste Local Syste Local Syste Local Syste	Concession of the second se
	Extended (Standard /	McAfee Validation Media Center Exte Microsoft .NET Fr	Allows Media Cente	Started	Automatic Disabled Disabled	Local Syste Local Service Local Syste	

STEP 3: Configuring the eFORMz Port Monitor

To capture incoming print files (or spoolfiles) from an alternative host system to a directory on your Windows operating system:

1. Create a new eFORMz Port by executing one of the two batch files from:

C:\Minisoft\eFORMz_6\portmonitor

This directory holds both 32bit (AddPortMonitor.bat) and 64bit (AddPortMonitor64.bat) versions of the install:

Name	Date modified	Туре	Size
퉬 Win32	11/21/2013 4:22 PM	File folder	
\mu Win64	11/21/2013 4:22 PM	File folder	
AddPortMonitor.bat	8/12/2013 1:25 PM	Windows Batch File	1 KB
AddPortMonitor64.bat	8/12/2013 1:25 PM	Windows Batch File	1 KB
DelPortMonitor.bat	8/12/2013 1:25 PM	Windows Batch File	1 KB
DelPortMonitor64.bat	8/12/2013 1:26 PM	Windows Batch File	1 KB
monset.exe	7/25/2013 9:59 AM	Application	67 KB
💷 monset64.exe	7/25/2013 10:00 AM	Application	76 KB

- 2. Add a new printer via your Windows Printer Wizard (START Menu > Control Panel > Printers > Add Printer).
- 3. Select LOCAL PRINTER and then click Next.
- 4. Choose *Create New Printer Port*. From the drop down list select *eFORMz Port Monitor*. Click *Next*.

🚱 🖶 Add Printer	
Choose a printer port	t nnection that allows your computer to exchange information with a printer.
 Use an existing port: Create a new port: 	LPT1: (Printer Port)
Type of port:	eFORMz Port Monitor
	Next Cancel

CHAPTER 1

From the eFORMz Port Monitor dialog box enter the *port name* and *number (id)*.
 We recommend using the format *EFZn* where *n* is a value number.

eFORMz	Port Monitor - Add Port	? ×
æ	Enter a name for the eFORMz port:	ОК
	EFZ1	Cancel

6. Using the browse button for the *Capture Directory* field select the folder where you would like your captured files to reside:

eFORMz F	Port Monitor v2.0.1 - Configure Port	x		
æ	Port Name: EFZ1 Capture Directory: C:Winisoft\eFORMz 6\Input			
	Optional Filename			
	Record file capture in Event log			
	 Use printer name for capture file name Trace 			
	OK			

Optional Filename allows you to give the file name a unique name as files are placed into the capture directory. All files will contain this naming convention with a automated time stamp:

my_new_template_201307112240263320.zpl

my_new_template_201307112240291480.zpl

my_new_template_201307112240303780.zpl

Record file capture in Event log can remain unchecked. Check *Use printer name for capture file name only* if you wish the data file name to replicate the name of the printer, otherwise, leave unchecked. Check *Trace* to implement tracing on the port monitor, leave unchecked.

Click OK when complete.

NOTE: The resulting trace file can be found in the Windows System32 folder noted as 'efzmon.tra'.

7. Select *Generic* as the Manufacturer and *Generic/Text Only* as the Printer type.

~					
\bigcirc	🚔 Add Printer				
	Install the printer driver Choose your printer from the list. Click Windows Update to see more models. To install the driver from an installation CD, click Have Disk.				
	Manufacturer Epson Fuji Xerox Generic Gestetner Un This driver is digitally sign <u>Tell me why driver signi</u>		Printers Generic / Text Only Generic IBM Graphics 9pin Generic IBM Graphics 9pin wide MS Publisher Color Printer Mindows Update <u>W</u> indows Update Have Disk.	·	
			Next	incel	

- 8. Select Keep Existing Driver.
- 9. Enter a Printer Name. The printer name should match the QUEUE name that is specified on your host system sending the print files (spoolfiles) to your Windows operating system. Once complete your new port will be added:



Chapter 2

eFORMz Composer

Introduction

The eFORMz Composer allows you to build, maintain, and manage an eFORMz project file. A single eFORMz project file can contain any number of forms, variables, and rules. Each project can contain a number of *Logical Pages*, with each page containing a number of *Forms*. Forms can be created dynamically within eFORMz or using a preferred word processor, desktop publishing, or drawing package.

Each form can contain a number of *Rules*. Rules are used to alter the appearance of data that is displayed on the form. Rules provide you with the options of changing font size and style, moving data, converting ASCII characters to barcodes, and much more.

The vast majority of projects will only have one logical page even though the actual print job may contain several physical pages. For example, if you are creating a payroll print job for your company that consists of 5 employees and the payroll print job simply prints one check after another, this would be considered a single page project as shown in *Illustration 1*.

However, if you are creating a payroll print job for your company that consists of 3 employees and the payroll print job prints a deductions/check followed by an employer deductions without a check, this would be considered a two page project. This would allow you to change and edit the two entities separately. See *Illustration 2*.

CHAPTER 2

Illustration 1: eFORMz Single Page Project



Illustration 2: eFORMz Two Page Project


eFORMz Composer Tour

The eFORMz Composer consists of two main window area's, *Project* and *Viewer*, with each having their own distinct functions. The Viewer can be split into two panes (horizontal or vertical view) with synchronized scroll bars allowing you to customize your display.

File Project Run Host Tools Window Help	
A Project - sampstm	🖉 Viewer 🖉 🖉
Sampstm Sample Statement	View Image: Open Data Image: Comparison of the standard of the sta
∲- 圃 Rules	Form/Data Viewer
Current Project	MINISOFT, INC. 1024 FIRST STREET SNOHOMISH, WA 98290
Variables Image: CompanyName MINISOFT, INC.	Sample S ^{1024 First Street} Snohomish, WA 98290
	MINISOFT, INC. 1024 FIRST STREFT (1024 FIRST ST
sample_statement	Sample_statement

The *Project* window displays the entire project layout:

- project name, pages(s), and form(s)
- variables and rules
- form and data rule conditions and much more.

The Viewer window displays two main window panes by default:

- Input Data Viewer (Data only) Displays your incoming data. The incoming data is the data you would like to format or manipulate. The Input Data Viewer is also used to create custom variables and conditions for use in rule actions.
- Form Viewer (Form and Data merged) Displays your custom form and custom formatted data as it would appear when printed.

CHAPTER 2

Vertical Split Pane

File Project Run HostTools Window Help	3			
🖨 Project - sampstm 🛛 🗹	👔 🗎 Viewer			ø' 🛛
A samptim Samptim Samptime Statement Sampting_statement Outputstates Uses Uses Outputstates Outputstes Outputstates Outputstates	View ▼ (120 dpr Data) Q Q 120 dpr 11 + 15 (11 6)	stmdata.dat (+)	ne Minisoft	1842.0 : 2359.6
I Project eDIRECT PLUS	MINISOFT, INC. 1024 FIRST STREET SNOHOMISH, WA 9829C PH. 800-682-0200 FAX 360-568-6602	Sne	1024 First Street homish, WA 98290 MINISOFT, IN 1024 FIRST S' SNOHOMISH, WA PH. 800-682-6 FAX 360-568-6) C. FREET A 98290)200
Variables 2 Value	02/01/00 53434321123	TRANSACTIK	N TRANSACTION NO.	
CompanyName BINISOFT, INC.	1 D ☆ ¥ 1750 《%≫≯00 ≡ ☆ ¥1	78.4 < « » Þ		3 • • • • • • • • • • • • • • • • • • •
sample_statement	sample_statement			

Horizontal Split Pane

Verwie Staarsen Dampie Staarsen Da	File Project Run Host Tools Window Help	
Verwie Staarsen Dampie Staarsen Da		
P Sample Statement P Sample Statemen	🚔 Project - sampstm 🛛 🖾	B Viewer
	P □ Sample Statement P □ sample_statement P	C C 120 dpi 🕂 🛱 👪 🤤 stmdata dat 🖨 1 🖨 714.0 : 0.0
1024 FIRST STREET SNOHCMISH, WA 98290 Project e0/RECT PLUS Variables Oranabolas Database Standbase Standbase Standbase Standbase Standbase Intervention Standbase	- ₩ CompanyName • ■ Rules	
Variables Value Va		1024 FIRST STREET SNOHOMISH, WA 98290
	Variables 2' X	1024 First Street
sample statement		1024 FIRST STREFT ↓ □ ▲ ¥ 1750 (4 ₩ ≯ 000 = ▲ ¥ 1784 (4 ₩ ≯ 300 = 1 = 6250 I 1010

Getting Started with eFORMz

To get to know eFORMz start the eFORMz Composer from your *Start* menu by selecting *Programs* > *eFORMz* 10 > *eFORMz* Composer. The eFORMz Composer application will open. To view the applications potential, open one of the sample eFORMz project files. From the eFORMz Composer *File* menu:

- 1. Select File: Open Project.
- 2. The *Open* dialog box will display. From the *Look in* field navigate to the following directory:

C:\Minisoft\eFORMz_6\Projects\

Choose a project from one of the following folders:

eDIRECT				
sampstm1.efz	Starter eDIRECT project file.			
sampstm2.efz	Example project showing how a email or fax number can be pulled from the data file to be placed dynamically in eDIRECT.			
sampstm3.efz	Example project for database lookup of email address.			
eDIRECT+				
SAMPLE-1.efz	Sample HTML output order confirmation. Includes a sample image of the order confirmation (sample- layout.jpg) and the layout in .psd format (sample- layout.psd)			
Sample				
sampstm.efz*	Sample statement.			
sampinv.efz	Sample invoice.			
sampchk.efz	Sample check.			
samppo.efz	Sample purchase order.			
greenbar_landscape.efz	Sample greenbar in landscape format.			
greenbar_portrait.efz	Sample greenbar in portrait format.			
Software Provider Templates				
JDA	Collate, Invoice, Statement			
Growth Power	Invoice, Purchase Order			
MAPICS	Invoice, Statement			
QAD	Purchase Order			

*For this example we are opening the *sampstm.efz* eFORMz project file from the Sample folder.

CHAPTER 2

3. Once the project file has been selected click Open.

🙆 Open		×
Look <u>I</u> n:	Sample	
🗋 grayb	/bar_landscape.efz	
📄 🗋 grayb	/bar_portrait.efz	
samp	npchk.efz	
samp	npinv.efz	
🗋 samp	nppo.efz.	
📄 samp	npstm.efz	
File <u>N</u> ame	ne: sampstm.efz	
Files of T	Type: eFORMz project files	-
	Open	Cancel

- 4. The *Data File* dialog box will display. Select the data file from the *Sample* folder that corresponds to the sample project you selected and then select *Open*.
- 5. The eFORMz Composer will now display the project file layout in the *Current Project Window*.

File Project Run HostTools Window Help							
🖨 Project - sampstm 🛛 🗹	Viewer	a 🛛					
sampstm Sample Statement o B sample_statement o El variables	View ▼ 🔄 Open Data	stmdata.dat 1 3 1842.0 : 2359.6					
	MINISOFT, INC. 1024 FIRST STREET SNOHOMISH, WA 98290 PH. 800-682-0200 FAX 360-568-6602	 Interference Inter					
Variables 2 Value	02/01/00 53434321123	TRANSACTION TRANSACTION I DATE NO.					
CompanyName MINISOFT, INC.	x	02/01/00 53434321123					
sample_statement	□ □ </td <td>178.4 (≪ ≫) 30.0 I≣6.250 I 10.10</td>	178.4 (≪ ≫) 30.0 I≣ 6.250 I 10.10					

TIP: If the Viewer window does not display as shown above, *right click* the project file name from the Current Project Window and select *Display Forms and Data*.

Printing the Sample Project

To print the sample project file to a networked printer:

1. From the eFORMz main menu select *Run > Print*.



CHAPTER 2

2. The *Select Printer* dialog box will display. Select the printer you would like to print to and then select one of the following formats:

Format > PCL (Black and White) - for black/white printing to a LaserJet printer.

Format > PCL (Color) - for color printing to a LaserJet printer.

Format > ESC/POS - printing to Epson Point of Sale printers.

Format >Intermec - printing to Intermec printers.

Format > Toshiba - printing to Toshiba printers.

Format > PDF - standard PDF output.

Select Printer					
Printer Brother MFC-7860DW					
Format PCL (Black and White) PCL (Color) Postscript Image Zebra XML AFPDS ZPLII SBPL ESC/POS Intermec Toshiba PDF Copies 1	Select Pages All pages Current page Page range: O From start O From end Start page 1 End page 1				
	<u>O</u> K <u>C</u> ancel				

3. Click OK. The merged form and data will print on your networked printer.

Chapter 3

Creating an eFORMz Project File

Capturing a Print File / Spoolfile

STEP 1

The first step to creating and setting up your own eFORMz project file is to capture or create a test print file (or spoolfile) for implementation in an eFORMz project file. We recommend a print file containing 3 or more data pages. The captured print file (or spoolfile) will be used as a template for building your eFORMz project file. To capture a print file from your host system (Windows, iSeries/AS400, HPe3000, or Unix environment) for creating an eFORMz project see one of the following headings pertaining to your host system.

eFORMz supports a wide range of input file types including:

- XML
- EDI
- ASCII Text Files
- PDF Files
- eFORMz Document Files (.efd)
- ZPL II
- EPL
- SCS

Windows Server

- 1. Create an ASCII text file from the Windows application producing your data.
- 2. Save the data file to the projects folder containing your eFORMz project file.
- 3. We recommend adding a .DAT extension to the file name for easier file selection from the eFORMz Composer.

AS400 Data Capture

To download a spoolfile for project testing on your PC with eFORMz:

- 1. From the eFORMz Composer select *Host Tools > AS400 > Director Toolkit*.
- 2. The AS400 Login screen appears. Enter your AS400 IP Address, user name, and password. Once complete click Connect.
- 3. The *AS400 Toolkit* dialog box displays. From the Spoolfiles tab, select the queue the spoolfile resides in by selecting the *Print Queue* field. A listing of all print queues will appear.

ਭ Director Toolkit for iSeries, Connected, Licensed to Minisoft Inc, eDIRECT 🗕 🗖 💌						
File						
Configure Director Printers Databases Archives Spoolfiles Overlays						
Print Queue /QSYS.LIB/QGPL.LIB/QDKT.OUTQ						
Spoolfiles: /QSYS.LIB/QPLLIB/QPRINTS.OUTQ						
File Name VQSYS.LIB/QGPL.LIB/QPRINT2.OUTQ						
ASYS.LIB/QIJS.LIB/QIJSOUTQ.OUTQ ASYS.LIB/QRCL.LIB/QSPRCLOUTQ.OUTQ						
/QSYS.LIB/QSC5772116.LIB/QSCAPAROQ.OUTQ						
Toggle Status View Download Delete						
Data conversion						
*USERASCII - default						
*AFPDS - Advanced Function Presentation Data Stream						
"IPDS - Intelligent Printer Data Stream						
SCS - an EBCDIC, text-based printer data stream						
*PRTF - Use printer file						
User data User defined data						
Upload						
Connect to: 172.29.147.112, V7R2						
a						

CHAPTER 3

4. Once the queue has been selected click *Display*. The spoolfiles contained in the queue display:

🛃 Director 1	🔬 Director Toolkit for iSeries, Connected, Licensed to Minisoft Inc, eDIRECT 😑 🗖 📉 🗙					×	
File							
Configure	Director F	Printers Da	atabases A	rchives S	poolfiles	Overlays	
Print Queu	QSYS.LIB/		στουτο				-
	-						
Use	r *ALL						
Spoolfiles:			Automatic	ally refresh Sp	oolfiles displ	lay Disp	lay
File Name	File Number	Job Name	Job Number	User Name	Status	User Data	
PODATA	9	QPRTJOB	026948	U0009887	*READY	ABCD	/QSYS.L
STMDATA	10	QPRTJOB	026948	U0009887	*READY	ABCD	/QSYS.L
STMDATA	2	QPRTJOB	026948	U0009887	*HELD		/QSYS.L
•							•
	II						
To	ggle Status	V	'iew	Downlo	ad	Delete	
			🗌 Data c	onversion			
	۲	*USERASCII	- default				
	0	*AFPDS - Ad	vanced Functi	on Presentati	on Data Strea	m	
			ligent Printer E				
	0	*SCS - an EE	BCDIC, text-ba	ised printer da	ata stream		
	PRTF - Use printer file						
	User data User defined data						
Upload							
Connect to: 172.29.147.112, V7R2							

Creating an eFORMz Project

5. From the list of print files appearing within the queue, select a print file you would like to download. Once selected click *Download*.

🔬 Director Toolkit for iSeries, Connected, Licensed to Minisoft, eDIRECT PLUS Enabled						
File						
Configure Director F	Printers Da	atabases A	Archives S	poolfiles	Overlays	
Print Queue /QSYS.LIB/0	GPL.LIB/QPF	RINT.OUTQ				
User *ALL						
USEI ALL						
Spoolfiles:		Automatic	ally refresh Sp	oolfiles disp	lay I	Display
File Name File Number	Job Name	Job Number	User Name	Status	User Da	ata
OPDSPJOB	DSP01	019136	QSECOFR	*READY	FFDC	/QSY 🔺
QPRINT 1	QSLPSVR	019109	QSYS	*READY		/QSY
REQUEST 1	QPRIJOB	019471	QSECOFR	*READY	SQL	/QSY
QPRINT 1	QSLPSVR	019476	QSYS	*READY		/QSY 🚽
Toggle Status	V	/iew	Downlo	ad	Delete	
		🖌 Data c	onversion			
	*USERASCI	I - default				
l c	*AFPDS - Ad	lvanced Functi	on Presentatio	on Data Strea	am	
	*IPDS - Intel	ligent Printer D)ata Stream			
_		BCDIC, text-ba		ita stream		
PRTF - Use printer file						
User data User defined data						
Upload						
Connect to: 172.29.148.221, V7R2						
	Co	nnectio, 172.2	148.221, V	πz		

6. The *Data File* dialog box displays. Select the directory you would like to save your print file to and then enter a new *File Name*. Once complete click *Save*.

🛓 Data file	X
Save In: 📑 S	Sample
test_form_	_00011_images
test_image	es
🗋 chkdata.da	at
invdata.dat	t
🗋 podata.dat	t
File <u>N</u> ame:	stmdata.dat
Files of <u>T</u> ype:	Data files 🗨
	Save Cancel

The print file is now ready for testing with your eFORMz project.

HPe3000 Data Capture

To capture a spoolfile using NetPrint, simply do the following:

Enter the following command from the PUB.MINISOFT account:

:NPFILE {spoolfile ID # without the O}

The command file instructs NetPrint to create a disk file of your spoolfile minus the HPe3000 printer control codes. This file, which will match the name of your spoolfile, is created in the PUB group of your MINISOFT account.

Transfer this file as 'binary" without file labels or 'save file info' selected to the same directory as your project on your PC. We recommend adding a .DAT extension to the file name for easier file selection from the eFORMz Composer.

Note: If the NPFILE command is not located on your host system, NPFILE.PUB. MINISOFT, upload (ASCII transfer) the command file that was placed in the following directory when eFORMz was installed (NPFILE):

C:\Minisoft\eFORMz_6\doc\

For ESPUL users, upload the ESPFILE command file from this same directory to the

PUB group of the RAC account (ASCII transfer).

UNIX Environment Data Capture

To download a data file from your Unix system:

- 1. From the eFORMz Composer select *Host Tools > Unix > Download a file*.
- 2. If a connection has not already been made, the Unix Login dialog box will display. Enter your *Host IP Address, user name*, and *password* and click *Connect*.

	💩 Unix Login		×	
	Host Address	192.168.23.231	-	
	Host Port	21		
	Host Type	Automatically detect	-	
	User Name	root	-	
	Password	•••••		
		Use SSH		
	Known Hosts File			
		Use Known Hosts File		
		Connect Close		
_				J
	P: Upload <i>file</i> opt	,	PC usin	g the HostTools > Unix > Upload a

CHAPTER 3

3. The *Source File* dialog box displays. Select the data file you would like to download from a directory and click *Open*.

Source File	x
Path /minisoft/input	1
🖹 stmdata.dat	
File Name stmdata.dat	Open
Files of types Data files 🗸 🗸	Cancel

4. The *Destination File* dialog box will display. Specify the directory you would like the data file to reside in on your PC. Click *Save* when complete.

r 🕌 Destination	n file	.
Save In:	3 Sample	
C email chkdata invdata. podata. Stmdata	dat dat	
File <u>N</u> ame: Files of <u>T</u> ype	stmdata.dat : Data files	
		Save Cancel

5. After the download process has been completed you will be returned to the main eFORMz Composer screen.

Creating an eFORMz Project

STEP 2

Once you have your data file (print file/spoolfile) you now have the components needed to create an eFORMz project file.

To create a new project:

- 1. Select New Project from the eFORMz File menu.
- 2. Select *File > Save Project As*. From the *Save* dialog enter a new project file name and click *Save*.



TIP: When eFORMz was installed a Projects folder was created in the following directory:
 C:\Minisoft\eFORMz_6\Projects\
 We recommend that you create a new folder pertaining to your new project file and place all components (data file, form template file, project file, etc.) in this central location for easy access.

3. From the Current Project Window select your new project file name, *right click*, and select *Add Page*.

File Project Run HostTools Window Help			
🚔 Project - Project 🛛 🛛	Viewer 2 2		
Project			
Display Forms and Data			
Open Data File			
Print			
Output			
Process w/eDIRECT PLUS			
Add Page			
Add Global Variable			
Add AND Condition			
Project eDIRECT PLUS			
Variables 🛛 🖉			
Variables 12 12			

- *TIP*: A new 'Page' represents a new *logical page* not the number of printed pages. See *Chapter 2 Introduction to eFORMz* for a further explanation on logical pages.
 - 4. The *Page Properties* dialog box displays. Enter the number of *lines per page* and click *OK*. A new page folder will appear in the Current Project window, enter a new name if desired.

If you are unsure of the number of *lines per page* the Page Properties dialog box can be updated later.

Page Properties	×
Page Input XML Input	
Lines per page 0 * * 0 = use formfr for page bre	
<u></u> K	<u>C</u> ancel

- **TIP:** Lines per page is the number of lines per each data page, default settings include Portrait = 66 lpi and Landscape = 51 lpi. Setting the *lines per page* to zero (o) indicates form feeds are contained in the data file and should be used as the data page separator.
 - 5. Using your mouse, *right click* your new page and select *Add Form*.



6. The Select source of form dialog box displays. Select From file.

Select	×	
Source of Form		
From file		
O Blank		
<u>0</u> K	<u>C</u> ancel	

NOTE: From file indicates you are going to select a template form that you created earlier from a form template. *Blank* indicates you are going to use an eFORMz blank template which can be set to portrait or landscape in the Forms Properties dialog box.

7. The Open dialog box displays. Select a sample form from the following directory: C:\Minisoft\eFORMz_6\projects\sample\ sample_statement.rtf

💩 Open		×
Look <u>I</u> n:	Sample	- 6 6 C 8 -
🗋 graybar_la	andscape.rtf	
🗋 graybar_p	ortrait.rtf	
sample_c	hecks.rtf	
🗋 sample_ii	nvoice.rtf	
sample_p	o.rtf	
sample_p	oterms.rtf	
sample_s	tatement.rtf	
File Nome:	comple_statement.df	
File <u>N</u> ame:	sample_statement.rtf	
Files of <u>T</u> ype:	Rich Text files	~
		Open Cancel

- 8. From the *Form Properties* dialog box make any necessary changes for example:
 - page size
 - orientation
 - default font and font size

The Form Properties dialog box can be edited later by right clicking the form name from the Current Project window and selecting *Properties*.

Form Properties	3		
General Font Data Relocation Data Suppression Zebra XML			
Page Size Letter ▼ Form Data Orientation Portrait ▼ Top offset 0.0 0.0 Lines per inch 6.000 0.0 0.0 0.0			
Data viewer size: Match page size Fixed Width 5760.0 Height 7920.0			
Exclude data Overlay on previous form			
Paper side Next Source Tray Current Suppress output when empty Output Tray Current			
Edit condition QK Cancel			

Once complete click OK.

9. Your form template will now appear in the Current Project window.



10. To reload this form, highlight the form and select the *Reload Form* button from the main toolbar. The Reload Form button is configured through *System Properties* > *Form Editor* tab:





Displaying a Form with Data

1. To view your form with your test data file (print file/spoolfile) select the project file name from the Current Project window, *right click*, and select *Display Form and Data*.

File Project Run	HostTools Window Help
- 	
🔒 Project - samp	stm 🛛 🖄 🗎 Viewer 🗇 🏹
A sampstm	
• C sample_	Properties
	Display Form
	Display Form and Data
	Print
	Output
	Add Constant
	Add Input Field
	Add Variable
	Add Pre-condition Procedure
	Add Post-condition Procedure
	Add AND Condition
•	Add Document Component
Project eDIREC	Load Document from a File
	Add Record Element
Variables	Add Rule •
	Add rules from an external project
	Insert Form
	Insert Copy of Form
	Replace
	Reload
	Rename
	Remove
Ľ	

2. Data File dialog box will display. Select the data file you would like to view your template form with and click Open.

💩 Data file				×
Look <u>I</u> n:	Sample	•	a 🔒	
🗋 chkdata.da	t			
invdata.dat				
podata.dat	_			
🗋 stmdata.da	at			
File <u>N</u> ame:	stmdata.dat			
Files of <u>T</u> ype:	Data files			-
			Open	Cancel

3. In the eFORMz Composer Viewer window you should now see a two part window

Creating an eFORMz Project

display. Depending on your Viewer settings one window will contain your incoming data (test print file/spoolfile) and another window will contain your incoming data along with your template form merged together.



- **TIP:** If you would like to view only your template form in the Viewer, from the *Current Project* window select the form you would like to display, *right click*, and select *Display Forms*. A new tab will display in the Viewer displaying your form template.
- *TIP*: If you would like to open a new data file to test with your current project file, open a new data file in one of the following ways:

Option 1: Select the project file name from the Current Project window, *right click*, and select '*Open Data File...'*. The *Data File* dialog box will display. Select a file type and then select the directory your new data file will resides in. Once completed, select *Open*.

Option 2: From the Viewer window select the *Open Data* button. The Data File dialog box will display. Select a file type and then select the directory your new data file will resides in. Once completed, select *Open*.

Form Overlay

STEP 3

A form overlay can be applied to your captured data in one of two ways. If you are replacing a pre-printed form, a form overlay can be a replica of your existing pre-printed form. The *captured form overlay* can be created using a word processor, desktop publishing or drawing package.

eFORMz also has the ability to create *dynamic form overlays*. Dynamic form overlays move with your data and can be built and designed from within the eFORMz Composer. Dynamic form overlays allow you to create forms that move with your data or can be used in conjunction with creating HTML output. The customized dynamic forms for HTML output can be customized with urls, links, pictures, and tables. Dynamic forms can also be used to create free flowing forms.

Captured Form Overlay

A form overlay can be created using a word processor, desktop publishing or drawing package. If you're using Microsoft Word, a Microsoft Word RTF (Rich Text Format) form can be imported directly into the eFORMz project. For a sample Microsoft Word RTF document provided by Minisoft, see the following example installed with eFORMz:

\Minisoft\eFORMz_6\Projects\Sample\Sample_Statement.rtf

The Microsoft Word RTF file format can be directly loaded into eFORMz using the *Load Form* option from the eFORMz main menu.

If you're using an application other than Microsoft Word, capture your form overlay using the methods described in *Appendix A: Alternate Form Template Creation*.

TIP: We recommend designing your form around your data by creating a blank or "frame form" before adding detailed graphics and text.

Creating an eFORMz Project

Example "frame form"			
a sample_statement.doc - Microsoft ₩ord			
File Edit View Insert Format Tools Table Window Help			
〕 D 😂 🖬 🗿 🚇 D. ♥ 🐰 🛍 ♥ • ♥ • ♥ • 🚷 ¶ 50% • [2] 👋] ≡ 3			
	ੈ‡‡ ÷		
i granaray			
landaranan 2 processor 2 processor			
i i i i i i i i i i i i i i i i i i i			
•			
ια ·			
<u>.</u>			
<u>*</u>			
ŵ la			
	-		
	2		
	•		
	P		
] Dr_aw + 🔓 🍪 AutoShapes + 🔨 🌂 🗔 🔿 🏭 🔩 🖗 + 🛃 + 📥 + 🚍 🚍 🛄	»» •		
Page 1 Sec 1 1/1 At 0.2" Ln 1 Col 1 REC TRK EXT OVR			

Dynamic Form Overlay

Dynamic forms can be created through the eFORMz Composer. To implement a dynamic document, a dynamic component must be added to a form. A dynamic component includes:

- paragraph
- table
- and box

To include a dynamic component:

1. Right click your form and select Add Document Component > Paragraph, Table, Box, External document template, or Document output from a project:



NOTE: For specific instructions concerning configuring a dynamic form, see *support.minisoft.com* for instructional video's on 'Document Template'.

Project File Printing

STEP 4

To print your merged form and data using the eFORMz Composer:

File Project Run Host Tools Window	Help
📂 🔗 🔛 Print	f 😁
Output Process w/eDIRECT PLUS	⊠ Viewer
A sampstm	View 👻 😅 Open Data
	Q 🕄 120 dpi 🕂 🐺 🖽 🧕 stmdata.dat ← 1 🖨 474.0:6.0
♥ III Variables ↓ III CompanyName	
♥ III Rules ♥ III Bold CompanyName	P
P→ P⊞ Rule1 P→ I型 Actions	
O Place Text	
	MINISOFT, INC.
	1024 FIRST STREET
Project eDIRECT PLUS	
	Sam Sam
Variable Value	Minisoft Sam
CompanyName MINISOFT, INC.	1024 First Street
	Snohomish, WA 98290
	$\square \xrightarrow{\bigtriangleup} 175.0 (\swarrow) \Rightarrow 0.0 \qquad \square \xrightarrow{\checkmark} 178.4 (\checkmark) \Rightarrow 30.0 \qquad \square$
sample_statement	sample_statement

1. From the eFORMz main menu select *Run > Print*.

2. From the *Select Printer* dialog box select the printer you would like to print to and then select one of the following:

Format > PCL (Black and White) - for black/white printing to a LaserJet printer.

Format > PCL (Color) - for color printing to a LaserJet printer.

Format > ESC/POS - printing to Epson Point of Sale printers.

Format > Intermec - printing to Intermec printers.

Format > Toshiba - printing to Toshiba printers.

Format > PDF - standard PDF output.

CHAPTER 3

Black/White Printer Options

Select Printer				
Printer Brother MFC-7860DW				
Format PCL (Black and White) PCL (Color) Postscript Image Zebra XML AFPDS ZPLII SBPL ESC/POS Intermec Toshiba PDF Copies 1	Select Pages All pages Current page Page range: From start From end Start page 1 End page 1			
	<u>O</u> K <u>C</u> ancel			

Color Printer Options

Select Printer	×
Printer Ricoh Aficio SP C811DN PC	CL5c 💌
Format: PCL (Black and White) PCL (Color) Postscript Image Zebra XML AFPDS ZPLII SBPL ESC/POS Intermec Toshiba Copies	Select Pages All pages Current page Page range: From start From end Start page End page 1
	<u>O</u> K <u>C</u> ancel

The Printer dialog box allows you to print a range of pages. Select *Page Range > From Start* or *From End*. For example, if you would like to print pages 10-20 select *Page Range > From Start*:

Start Page = 10 End Page = 20

If you would like to print pages 10 to the end of a file select Page Range > From Start:

Start Page = 10 End Page = 9999

If, for example, you would like to print all pages minus the last page select Page Range > From End:

```
Start Page = 9999
End Page = 1
```

Also, if you would like to print the last 10 pages of a report select *Page Range > From End*:

Start Page = 9 End Page = 0

NOTE: Reverse page numbering starts at zero (0, 1, 2, 3, 4, ...).

If you would like to set a default page range for the project file edit the *Project Properties > Printer Control* tab:

Project Properties	×
Printer Control Sort Notes Data Parsing Advanced	d Images Databases 🚺
Media Default	Print/Output All pages Current page Page range: From start From end Start page 1 End page 1
	OK Cancel

Chapter 4

eFORMz Composer Data Customization

Customizing your data output

eFORMz gives you the ability to customize your data output using variables and actions. Variables are the primary method used by eFORMz in the customization of your data output. Variables allow the user to store data for later use and create *actions*, *functions*, and *conditions*. Any one variable can be used multiple times in a project layout.

Actions include data placement, barcodes, font sizing and style, and much more. Functions allow you to further customize your data output by allowing you to do such things as set values, replace strings and include database lookups. Conditions such as 'equal to', 'not equal to', 'less than', and 'greater than' can be applied to both actions and any form you add to your project layout.

Cross-Reference: For further details, consult the eFORMz Composer Data Customization chapter of the *eFORMz Reference Manual*.

Creating an eFORMz Variable

Positional Data Block Variables

1. From the eFORMz Input Data Viewer, select a string of characters (*left click* + *drag*), *right click* and select *Add Variable*.

٧	e	w	•	•	€)pe	en	D	ata	a																																											
6)	6	2	1	20	d	pi	i	H	L	Н	8	ŧ			ê	3								s	tm	١d	ata	a. (lai	t	<	-	Γ		1	⇒]									4	42	28	.0	:	10	62	.0
								1		1	1						•		•	1	1	1		1	1		1									•							1	1	1	÷	1							T
																																																						f
ſ																																			0	0	0	0	0	1	2	3	4	Ŀ	5									
																																			E	-	-	-	-	-	-	-				-		-	-	_	ľ			
è																																			1	Ad	a١	/a	ria	וסו	e.													
',																																				Ad	dF	Pre	e-0	:01	nd	liti	or	۱F	rc	C	ed	ur	re	•				
																																				Ad	d F	• 0	st	-c(on	di	tio	n	Pr	0	се	du	ure	•				
																																				Ad	d E													•				
																						,													Ľ	٦u	ur	10	e	_	_	_	_	_	_		_	_	_		_			
			•	· .			-	1	-	-	-	-	-	·	·	_	•	•	1	1	1	1	1	1	1	-	-	-	-	-						Mo	ve	in	ומו	ut -	da	ata									Ŀ	-		_j;

eFORMz Composer Data Customization

NOTE: An eFORMz variable can also be created by *right clicking* on data input and selecting *Add Variable*. This method picks up a block of data verses instead of a specific number of characters. To create an empty variable for later use, *right click* the form and select *Add Variable > By position*.

2. The Variable dialog box will display:

Variable		×
Name Variable1		
Horizontal position 4419.8	Vertical position 936	6.0
# of characters 10	Height 0.0	*
🗹 Keep sp	acing * 0	= Form line height
Repeat 1 time(s)	Increment line by	1
Copy original data to output	📃 Include varia	able in XML output
Use as a bookmark in PDF of	utput	
	<u>0</u> K	<u>C</u> ancel

- 3. Enter a new variable name.
- 4. Once complete, click OK.

Excluding Data using a Variable

To exclude data from your output:

- 1. From the eFORMz Input Data Viewer, select the range of data to exclude (*left click* + *drag*), *right click* and select *Add Variable*.
- 2. The Variable dialog box will display. Enter a new variable name and leave *Copy original data to output* unchecked. Once complete, click *OK*.

Variable
Name RemitTo
Horizontal position 4419.8 Vertical position 936.0
of characters 10 Height 0.0 *
✓ Keep spacing * 0 = Form line height
Repeat 1 time(s) Increment line by 1
Copy original data to output Include variable in XML output
Use as a bookmark in PDF output
<u>OK</u> <u>Cancel</u>

CHAPTER 4

3. The newly created variable will display in the Project window. In the eFORMz Viewer the selected data will no longer appear:



NOTE: If the grid in the Input Data Viewer should need to be hidden for any reason, *right click* and select the *Grid* option. The Adjust Grid dialog box will display. Uncheck *Show Grid*. By *right clicking* in the Form and Data Viewer its grid may similarly be suppressed.

Node Data Block Variables

1. From the eFORMz Input Data Viewer, select the node, *right click* and select *Add Variable*.

Viewer	d. 🛛
View 👻 🚭 Open Data	
🔍 🔍 120 dpi 🔣 🕂 🛃	ORDERCONFIRM_1.txt ← 1 ➡ 132.0:0.0
OrderConfirmation EMailAddress = janesmith@companyu SubjectLine = Order Number W002100 EMailDearTo = Dear MRS. JANE SMITI OrderNumber = W00210880000 OrderNumberDate = 06/09/11 OrderNumberDate = 06/09/11 OrderLine OnderLine OrderLine Orde	Add Variable
	COMPANY Monday - Friday 8a
□ ↓ </td <td></td>	

2. The *Variable* dialog box will display:

	Variable
Name	EmailAddress
Data Node	OrderConfirmation/EmailAddress
Transfer method	Normal (any child elements as array)
Text processing	None
Node Filter	
Match Filter	
Match Value	
	Include variable in XML output
	Use as a bookmark in PDF output
	<u>O</u> K <u>C</u> ancel

Chapter 5

Host Project Transfer

iSeries/AS400

When you are ready to transfer a project to your host:

1. Open the project file from within the eFORMz Composer.

From the main task bar select *File > Open Project*. The *Open* dialog box will appear. Select the project file you would like to upload to your host system.

2. From the *Host Tools* menu select *AS400 > Save Project*. The *Save* dialog box will display.

NOTE: If you are not already logged in, an AS400 login dialog box will appear.

Select the directory you would like to save your project to (*default directory: minisoft*) and then click *Save*.

Save	×
Path /minisoft	E 🐣
☐ jars ☐ fonts ☞ sampstm.efz	
File Name sampstm.efz	
	Save
Files of types eFORMz project files	Cancel

Your eFORMz project file will be uploaded to the AS400 directory. If the file already exists a dialog box will appear asking you if you would like to overwrite the existing file. Click *Yes* for overwrite or *No* to cancel the process.

sampstm.efz	X
File alrea	dy exists.
Do you want	to replace it?
<u>Y</u> es	<u>N</u> o



To open an existing project located on the AS400 host system:

- 1. From the eFORMz Composer main menu select *Host Tools > AS400 > Open Project*.
- 2. The *Open* dialog box will display. Select the project file you would like to open from one of the AS400 directories. The *Open* dialog box defaults to the Minisoft directory.

Once your project file has been selected click Open.

Open	X
Path /minisoft	Ē 😤
jars declocal.efz macros sampstm1.efz sampstm.efz stmt_42047_form_00011_images stmt_42047_images stmt_42047_images	stmt1_42048_form_00011_images fonts
File Name sampstm.efz Files of types eFORMz project files	Open ▼ Cancel

- 3. An open *Data File* dialog box will display. If you have an existing data file on your PC select the data file from its directory, otherwise, click *Cancel*.
- 4. Your project file will display in the eFORMz Composer.


UNIX

To save a project file to your Unix host system:

- 1. From the eFORMz Composer open the project you would like to upload to the Unix host machine (*File > Open Project*).
- 2. Once the project file has been opened, select *Host Tools > Unix > Save Project*.
- 3. The Unix Login dialog box displays. Enter your Host IP Address, user name, and password and then click Connect.

🕒 Unix Login	×
Host Address	192.168.23.231
Host Port	21
Host Type	Automatically detect
User Name	root
Password	•••••
	Use SSH
Known Hosts File	
	Use Known Hosts File
	Connect Close

4. The Save dialog box will display. Enter the name you would like the project to have on the Unix system in the *File Name* field. By default the project path is the *minisoft* directory under *root*. Click *Save*.

ave		×
Path /miniso	ff/projects	t
File Name	sampstm.efz	Save

5. Once the save has completed you will returned to the eFORMz Composer.

CHAPTER 5

- **NOTE:** After the transfer of the project file to the host system, a change to the attributes of the project file must take place. From your host machine:
 - 1. Logon as Administrator (root).
 - 2. Change the directory to *minisoft*.
 - 3. From the *minisoft* directory change the attributes of the project file: chmod 755 {project name}.efz

Note, you will also need to do the above attribute change once you have created the command file.

TIP: A project file can also be opened from the Unix system:

- From the eFORMz Composer select Host Tools > Unix > Open Project. Login using your username and password and click Connect.
- 2. Select the directory where your project file is located and select the project file you would like to open.
- Click Open. Your project file appears in the eFORMz Composer. Make the necessary changes and then select Host Tools > Unix > Save Project to save your project file back to the Unix system.

If you are planning on implementing the merge process via a command process use the following instructions to create a project script file. If you are running the Unix Toolkit and implementing an automated job process, see *Chapter 9* for further information on implementing the automated job process in which a script file is not needed.

To create the script (.cmd) file:

- 1. From the eFORMz Composer main menu select *Host Tools > Unix > Save Project Script*.
- 2. The *Script Builder* dialog box will display:

Host Project Transfer

Script Builder	×
Input Directory /minisoff/input File Selection stmdata.dat	
Disposition: Change extension of selected file to ".hld" Append ".hld" to the selected file Delete selected file	
Project /minisoff/sampstm.efz	
Output Processes	
Print to roadrunner	Add
	Edit
	Remove
✓ Log to stdout	
🖌 Log to File 🔄 Append	
Log File /minisoff/eformzlog.txt	
ОК	Cancel

Input Directory

Using the browse button select the directory your data files will reside in to be merged with an eFORMz project file.

File Selection

Using the browse button select the data file name. Use asterisks (*) for multi data file selections (i.e. sampstm*.dat or *stm.dat).

Disposition

If you would like the print file to remain in the input directory after a merge has taken place, select *Change extension of selection file to* ".*hld"*.

If you would like the print file to maintain its original extension select *Append* ".*hld" to the selected file*. This will cause the *.hld* to append to the end of the original extension.

If you would like to delete the print file from the input directory after a merge has taken place, select *Delete selected file.*

Project

Using the browse button select the project file you would like the data files to be merged with. Default project directory is */minisoft* under root.

Output Process

Output process types include print, file output, and eDIRECT.

Print - Allows you to select the printer you would like to print your merged



output to.

File Output - Allows you to output your merged file to PDF, PCL, PRN, XML, or another . Using the browse button select the directory you would like your output to reside in.

eDIRECT - Allows you to specify an eDIRECT process.

Script Builder	×
Input Directory //minisofl/input	
File Selection stmdata.dat	
Disposition: Change extension of selected file to ".hld" Append ".hld" to the selected file Delete selected file	
Project /minisoff/sampstm.efz	
Output Processes	
Print to roadrunner	Add
	Edit
	Remove
✓ Log to stdout	
🗹 Log to File 📃 Append	
Log File /minisoff/eformzlog.txt	
ОК	Cancel

Note: Multiple processes can be added to the Output Processes.

3. Once your output types have been defined they will appear in the Output Process field. Use the *Add*, *Edit*, or *Remove* buttons if necessary.

Script Builder	X
Input Directory //minisoff/input	
File Selection stmdata.dat	
Disposition: Change extension of selected file to ".hld" Append ".hld" to the selected file Delete selected file	
Project /minisoff/sampstm.efz	
Output Processes	
Print to roadrunner	Add
Output to /minisoff/output/statements.pdf	
	Edit
	Remove
✓ Log to stdout	
🖌 Log to File 📃 Append	
Log File /minisoff/eformzlog.txt	
ОК	Cancel

4. Select the logging format.

Log to stdout - Logs to your display output.

Log to File - Logs all processes to a log file as defined in the *Log File* field. To set the log file name and location on the Unix system select the browse icon.

- 5. Once complete, click OK.
- 6. The *Save Script* dialog box displays. Enter a command file name (.cmd) and click *Save*.

Save Script	×
Path /minisoft	E 🐣
 projects fonts input jars output 	
File Name sampstm.cmd	Save
Files of types Script files	Cancel

CHAPTER 5

- **NOTE:** After the transfer of the command file to the host system, a change to the attributes of the command file must take place. From your host machine:
 - 1. Logon as Administrator (root).
 - 2. Change the directory to *minisoft*.
 - 3. From the *minisoft* directory change the attributes of the project file: chmod 755 {command file name}.cmd
- TIP:You can also edit an existing script file from a Unix system by selecting
Host Tools > Unix > Edit Project Script. Login to your host system and
select the script file you would like to edit from the specified directory.
The script file will display in the Script Builder. Make the necessary
changes and then click Save.

Script Command Options

Script Command	Example
-a <filename></filename>	Append to logfile. Example: -a "eformzlog.txt"
-c <directory><filemask> <copy directory="" to=""></copy></filemask></directory>	Copy files after output. Example: -c "/minisoft/input/*.hld /minisoft/backup"
-d <directory></directory>	Specify input directory. Example: -d "/minisoft/salesorders"
-e <basedirectory></basedirectory>	Process with eDIRECT. The base directory will be the directory the eDIRECT output will be sent to. Example: -e "/minisoft/invoice/output"
-f <filemask[:disposition>]</filemask[:disposition>	Specify file selection and optionally disposition. Optional dispo- sitions include: rename and delete Example: -f "inv.data:rename"
-help	-help
-l <filename></filename>	Log to file. Example: -I "eformzlog.txt"
-n <directory><filemask> <destination printer=""></destination></filemask></directory>	Print files after output. Example: -n "/minisoft/output/*.prn roadrunner"
-o <filename></filename>	Output to file. Output file extension options include: .pdf, .prn, .pcl, .xml. Example: -o "inv.pdf"
-p <project></project>	Specify project file. Example: -p "sampinv.efz"
-r <directory><filemask></filemask></directory>	Delete files after output. Example: -r "/minisoft/input/*.hld"
-t <printer> or -tc <color printer=""></color></printer>	Printer name. Example: -t "LJ5si" or -tc "LJ3800DN"
-u <basefilename></basefilename>	Output to file with unique names. Output file extension options include: .pdf, .prn, .pcl, .xml. Example: -u "invpdf"
-V	Logs to Stdout.
-x <command/>	Execute external command after output. Command options: mv - move command Example: -x "mv /minisoft/input/*.hld /minisoft/backup"

Windows

Transfer your eFORMz project files to a directory on your Windows Server running the eFORMz merge process. When eFORMz was installed on your Windows Server a *Projects* folder was created in the following directory:

C:\Minisoft\eFORMz_6\

Multiple directories can be added to the *Projects* folder for organizing your eFORMz project files, for example:



Appendix A

Alternate Form Template Creation

Creating a Form Template File for eFORMz

To import a form template into the eFORMz project file, you will first need to create a pcl print file (.prn) of your template. To create a pcl print file, follow the steps below using the suggested print driver.

Windows 2003 Print Driver

 Install the HP LaserJet 5Si PCL 5e print driver located in the C:Minisoft\eFORMz_6\ Doc subfolder (NT_2000 5SI Print Driver.exe). The following folder will be created in the following directory:

c:\lj371en

- 2. From the Add Printer Wizard proceed with the setup.
- 3. Select the Local Printer Option from the Print Wizard.
- 4. Select *File:Print to File* as your Port and click *Next*.
- 5. Select the *HPBLFF2.inf* file (print driver) from the associated directory (c:\lj371en). Once selected, click *OK*.
- 6. Click Next.
- 7. Enter a Printer Name *efzprinter*.
- 8. Select *No* if you do not wish this to become your default printer.
- 9. Click Finish.
- 10. The new *efzprinter* will appear in your printer listing. *Right click* the *efzprinter* and select *Properties*.
- 11. From the *General* tab click *Printing Preferences*.
- 12. The *Finishing* tab will display. Click *Details* under the Print Quality section.
- 13. From the *Print Quality Details* dialog box, select the following:

Graphic Settings > Complex Graphics > Use HP MEt Rendering Mode > Send Page as Raster

Output Settings >	Resolution > 6oodpi
	REt > ON
	Uncheck > Scale Patterns
	Check > Print all Text as Black

Font Settings > Check > Send TrueType as Bitmap

Note: In order to select *Send TrueType as Bitmap* you must first select *Rendering Mode > Send Graphics as Raster*. When *Send TrueType as Bitmap* has been selected return settings to *Send Page as Raster*.

Print Quality Details	
Current Setting	Output Settings
This is a "Custom" setting	Resolution:
	600 dpi
Graphics Settings	
Complex Graphics:	Resolution Enhancement technology
Use HP MEt	(REt):
C Use More Memory	🖲 On
	C Off
Rendering Mode:	Scale Patterns (WYSIWYG)
C Automatic	I Print all Text as Black
Send Graphics as Vector	
C Send Graphics as Raster	_ Font Settings
Send Page as Raster	🦆 🔽 Send TrueType as Bitmaps
C Automatic C Send Graphics as Vector C Send Graphics as Raster	Font Settings

14. When finished click OK.

Note: If you have any questions please contact Minisoft for further advice.

Windows Vista / 7 / 8 Print Driver

Install the HP LaserJet 5200L Series PCL 5 print driver using the following method:

- 1. Create a new printer using the *Add Printer* option from the *Control Panel* > *Printers and Faxes* dialog box.
- 2. From the Add Printer Wizard proceed with the setup.
- 3. Select the Local Printer Option from the Print Wizard.
- 4. Select File:Print to File as your Port. Click Next.
- 5. From the list of manufactures select *HP*. Select *LaserJet 5200L Series PCL 5* as the model type. Once completed, click *OK*.
- 6. Click Next.
- 7. Enter a Printer Name of *efzprinter* and click Next.
- 8. Select *No* if you do not wish this to become your default printer.
- 9. Click Finish.

Once your HP LaserJet 5200L Series PCL 5 print driver has been installed (efzprinter) click the *Properties* of this printer from the *Printers and Faxes* dialog box:

1. From the *Printing Preferences* dialog box click the *Advanced* tab and select the following options:

Print Optimizations: Print All Text as Black: Send True Type as Bitmap: Graphics Mode: Disabled Disabled Enabled Send Graphics as Raster



2. When finished click *OK*.

Index

Index

Α

AS400 data capture 37 eFORMz job queue 11 installation 9 project transfer 63 upgrade 9

С

color printer recommendations 6,7 creating project file 43

D

data suppression 59

E

eFORMz viewer 29 efzmon.tra 24 excluding data 59

F

form template prn file 74 form viewer 29

Н

horizontal split pane 30 HPe3000 data capture 40 installation instructions 15 NetPrint install 15 project transfer 65 WINEFZ queue 15 HP LaserJet 5Si PCL 5e 74 HP LaserJet 5200L 76 HP/UX install 17

I

iSeries/AS400 eFORMz job queue 11 java release 9 os version 9

J

java requirements AS400 9 job queue AS400 11

L

LINUX install 17

Ν

NetPrint 15

Ρ

page range from end 55 from start 55 pc install installation instructions web install 8 recommendations 8 requirements 8 printer recommendations black/white 6 color printer 6,7 label printer 7 print file / spoolfile capture 36 as400 data capture 36 hp3000 data capture 40 unix data capture 41 windows server 36 printing 33,52

S

Solaris install 17 spoolfile/print file capture 36 as400 data capture 36 hp3000 data capture 40 unix data capture 41

Т

tcp/ip printing 21 tcp/ip print server service 22

U

Unix installation instructions 17 project transfer 65 toolkit script command options 71 UNIX data capture 41

W

windows data file capture 36 project transfer 72 server install 19 windows port monitor 23 WINEFZ 15 WINEFZ queue 25