SBE V7.5 MANUAL

User Guide

July 2011 Version 7.5.01

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Software Version

This manual supports FTSpooler Enterprise Edition version 7.5. (Last update November 2010)

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Getting Started

Introduction to FTSpooler SBE Edition

FTSpooler integrates into a FormTrap production environment to provide identification, batch job splitting into individual documents, formatting and automated delivery of finished documents. Delivery methods include printing, email, faxing, outputting as a file to a nominated location on the disk or initiating other tasks to accomplish additional delivery methods. The document processing, formatting and delivery history can be viewed in archives using searching capabilities. FTSpooler checks for the arrival of data, identifies and splits it if necessary, formats it to produce a deliverable document (PCL and PostScript for printing, PDF for email, tiff for faxing), determines the method of delivery and delivers the document to your customer.

Getting Started

This is the FTSpooler Window for the SBE Edition.

Queues	p Data folders 🥃 Archive 🖇		eUes (ed to: Me, 77	and the second		6
New print queue New a	©→(⊇ [®] (⊙→)≓ -mail queue New identification queue Emp	1	Cone Delete	Tools	↔ Refresh…	
Queue	Function	Output	Email	-	and the second	plications
🧭 Invoice Email	PostScript forms: taxinvoice	support(General	Processing	Filters	Print
 Invoice Print Invoice Local Purchase Order Email Purchase Order Print Purchase Order Statement Email Statement Print Statement Remittance Advice 	 PostScript forms: taxinvoice QUEUES: Invoice Email; Invoice Print RESOLVE VIA: ftstdsplit PostScript forms: purchaseorder PostScript forms: purchaseorder QUEUES: Purchase Order Email; Purch PostScript forms: statement PostScript forms: statement RESOLVE VIA: stmt QUEUES: Remittance Advice File 	Support(Support(Selina@f Selina@f Selina@f	Queue name: Data Input Input service Line print File syste Named pi Notify Notify	er (LP) em ipe	Security]
ØRemittance Advice File ØStatement File	PostScript forms: remittanceadvice	<pre></pre>	Do not notif E-mail addre	™ ss (name@domain):	
 Simple Print Queue Simple Email Queue Failure 	EORMS: formtrap]	
Simple Identification Is template	RESOLVE VIA: stmt		Archive	of days to keep re	cords:	

The top navigation bar shows Connection, Queues, Data folders, Archive, and Setup.

• **Connection** connect clients to FTSpooler Server on the same machine, or remotely over the Windows network or the Internet.

- **Queues** window is used to manage queues. The concept of the queue is central to FTSpooler, and queues are normally allocated to specific delivery points (printers). Each queue allows document identification, splitting, re-direction, formatting and delivery. Before starting design of queues please first use the Setup window to configure FTSpooler settings and the Data Folders window to reload resource files.
- **Data folders** is used to manage resource files sucj as forms (designed in FTDesign), rule files which identify and split incoming files and substitution files. Use this after configuring FTSpooler via Setup. Use this window to update forms or rule files or to add new substitution files.
- **Archive** stores job processing and delivery information, and allows searching for information. Query searches for specific attributes of a document or job. Troubleshooting shows errors and expkanations of the errors.
- **Setup** window configures FTSpooler settings. This is the first screen to visit after installation. Configure printer licenses, email server parameters, define input methods and set locations for resource files. Once FTSpooler has been set, you will rarely neet to access this screen.

To access the online user manual, press the **F1** button from any screen in FTSpooler, or click the blue question mark icon and select **User Manual** from the popup menu. **F1** is context sensitive.

To access the online Knowledge Base from FTSpooler, click the blue question mark icon and select **Knowledge Base** from the popup menu.

To view FTSPooler product information, click the blue question mark icon and select **About** from the popup menu.

Immediately after Installation

We recommend allocating a special Windows "FormTrap User account" for the Spooler. Reasons for this are here Notes on writing to network drives.

Update to number of printers or other features:

We send you a .zip file that contains an update to your settings. Stop the "FormTrap Service". Use **Settings Merger** (FormTrap group of programs) to add the new feature(s) and restart the service. Check the addition(s) you ordered is installed.

Move existing Version 7 to a new Server:

Install software, move the entire %fthome% folder to the same location on the new server.

Upgrade from Version 6.4:

Install software, do not start the FormTrap Server, see Version Upgrade on page 124. Data folders need not be rebuilt. Printers will need to be re-allocated.

Upgrade from Version 6.3 or earlier:

Install software, do not start the FormTrap Server, see Version Upgrade on page 124. You will need to rebuild the form set in FTDesign. Printers will need to be re-allocated.

Queues

What is a Queue

The queue is central to FTSpooler.

Each queue holds a set of rules for processing and delivery of documents and may include any of these elements:

- **Split rules** allow document **identification** and optional splitting into individual documents.
- **Identified** documents or files may be formatted using a particular **form** within a **Data folder**. **Identified** documents or files may also be **redirected** to other queues for further processing, with no prectical limit on the number of redirections.
- **Delivery processes** may output your formatted document by fax or email to a printer, with the address of the output being formed dynamically, or as an attribute of the queue.

The common delivery processes normally do not overlap, so "short cut" queue definitions are provided for print and email as well as identification queues.

FormTra	P.			eues (1 d to: Me, 77 p			
	Data folders 📄 Archi	°Ø	-	one Delete	Tools	4y Refresh	
Queue	Function	Output		Email	Fax	File	Appli
Remittance Advice	Queues: Remittance Advice		ľ	General	Processin	g Filte	rs
🖉 Remittance Advice File	PostScript forms: remittance	/:⊃ ©					1
🕜 Statement File	PostScript forms: statement	C:\Documents a		A Second Second	ps template		
🧭 Simple Print Queue	Forms: formtrap	(IPLATO) HP Col		Data Input			
🕗 Simple Email Queue	PCL forms: formtrap			Input service	s:		
				Line printe	er (LP)	Security	/
🧭 Failure						and the second s	
	Resolve via: stmt			File syster		(
Failure Simple Identification Stmt test			=	File syster		Options	
Simple Identification Stmt test	Resolve via: stmt PostScript forms: statement					Option	i
Simple Identification	PostScript forms: statement	0293105172	-			Option	
Simple Identification Stmt test Simple stmt	PostScript forms: statement	₩ 0293105172	()	Named pip			

Confirmation about Queue Parameters Change

Making changes on any Queue Properties without clicking on the **Apply** button will receive the pop up confirmation window. You also need to decide on the **Future behavior**: **Keep displaying this window**, **Do not display this window**, **instead save changes**, or **Do not display this window**, **and do not save changes**.

Alternatively, the **Save changes** option can be configured in the **User Interface** under **Setup - Settings** tab.

More information on Configuration on Save changes Interface see page 68.

Queue paramenters change	? ×
Queue: Purchase Order	
Parameters of the queue may have changed. Would you like to save ch	
Save Don't	save
Future behavior	
• Keep displaying this window	
O Do not display this window, instead always save changes	
O Do not display this window, a not save changes.	nd do

Create a Queue

Once a data folder is created and loaded, queues are created to accept, identify and route and/or process incoming data. A "template" queue is available (grey and at the bottom of the Queue list) and can be modified or new ones added to be models used by the **New TYPE queue** options on the menu. We would normally recommend a template queue for each of the three shortcuts.

To create a new queue or modify an existing queue, configure queue properties in each tab in the **Properties Bar**, located in the right side of the FTSpooler Window. **General**, **Processing**, and **Filters** specify how to identify and build FormTrap document whereas **Print**, **Email**, **Fax**, and **Applications** deal with delivery options. **General** and/or **Processing** or **Filters** tabs are the minimum requirements for new queues.

Shortcuts condense queue properties for the common queues into a single window,

- Create a blank queue
- Clone (copy) a queue
- Create a simple print queue
- Create a simple email queue
- Create a simple identification queue

• Create a template queue

FormTra	P.			eues (1 ed to: Me, 77 p			
and the second sec	Data folders 📄 Arch	** *©	-	ore Delete	, Tools	<mark>≁∳</mark> Refresh	
Queue	Function	Output		Email	Fax	File	Applica
Remittance Advice	Queues: Remittance Advice			General	Processin	g 🕴 Filt	ers P
🖉 Remittance Advice File	PostScript forms: remittance	. 🍙c:\					
🖉 Statement File	PostScript forms: statement	C:\Documents	ā	Queue name:	ps template		
🕗 Simple Print Queue	Forms: formtrap		ol	Data Input			
🖉 Simple Email Queue	PCL forms: formtrap			Input service	es:		
				Line print	er (LP)	Securi	ty
🖉 Failure				File syste			
	Resolve via: stmt					Option	15
Simple Identification	Resolve via: stmt PostScript forms: statement		=	Named pi	pe	[
Simple Identification Stmt test		0293105172	m	Named pi	pe		
Simple Identification Stmt test Simple stmt	PostScript forms: statement	e 0293105172		Notify	pe		
 Failure Simple Identification stmt test simple stmt ps template pc template 	PostScript forms: statement	0293105172	<pre></pre>		pe Restore		telp

Empty queue

To create a new queue:

- Select **Empty queue** button from the top menu.
- **Properties Bar** presents the **General** settings:
 - Enter unique Queue name and set Data Input options.
 - **Notify** (optional) sets an email address for successful and/or failure notification emails.
 - Archive (optional) sets successful archive duration (failures are always archived).
 - Click **Apply** to save the settings.

More information on Queue Properties - General see page 10.

- The **Processing** tab provides logic control over each data type identified by the (optional) Rules file, which then appear in the Formatting and Replication list. Without a Rules file, just the one entry appears in Formatting and Replication.
 - Set the split rules, form(s), queue redirections, formatting options and processing options for this queue.
 - Click **Apply** to save the settings.

More information on Queue Properties - Processing see page 14.

- **Filters** tab is used to add "Filter Programs" at various points. Filters generally modify their input data. Standardly, an Input Filter is used to convert data from the locale (e.g. US English) to UTF-8 code as a precursor to Unicode conversion. User-written filters are very occasionally used to address very difficult data representation problems, and output filter may be used to action device-specific operations, such as stapling.
 - Add customized input filters, pre-identification filters, post-formatting filters or associated file filters for this queue.
 - Click Apply to save the settings.

More information on Queue Properties - Filters see page 20.

• **Print** tab nominates which printer(s) to associated with this queue as well as printer filters for delivery. Click **Apply** to save the settings.

More information on Queue Properties - Print see page 22.

• **Email** tab configures email delivery settings using either SMTP service or Outlook (MAPI). Click **Apply** to save the settings.

More information on Queue Properties - Email see page 23.

• **Fax** tab defines options for delivery via the Windows fax service (Windows 2000, 2003, and XP). Click **Apply** to save the settings.

More information on Queue Properties - Fax see page 26.

• **File** tab defines write-to-file options, including setting up structures for PDF archival. Click **Apply** to save the settings.

More information on Queue Properties - File see page 29.

• Applications tab defines options for customized delivery processes, such as Esker, Net Fax, and OsFax. Click Apply to save the settings.

More information on Queue Properties - Applications see page 31.

Clone (copy) a queue

If the queue being created is similar to an existing queue, select **Clone**. This creates a new queue using the highlighted queue's settings. The new queue's name and properties can then be modified. This is most useful where queues with extensive rule files are required across a number of printers.

To copy an existing queue:

- Select the queue to be copied.
- Select **Clone** button from the top menu.
- **General** tab presents, with **Queue name** shown as **copy of Highlighted Queue**, change this (at minimum), plus any other tabs, notably **Print**.

New print queue

This is a short cut to create a simple print queue from a template queue:

- Select **New print queue** button from the top menu.
- The **Simple print queue** dialog box pops up.
- Enter the **Name** of the queue.
- Choose the **Template** to copy.
- Choose the **Form** to be used in the queue. The available forms from the dropdown menu display in the format of form name (datafolder name), for instance, **statement**

(formtrap), where **statement** is the form name and **formtrap** is the datafolder name.

Select a **Printer** from the dropdown menu.

Name:	Simple Print Queue	
<u>T</u> emplate:	ps template	~
Form:	PS purchaseorder (formtrap)	~
Printer:	\\PLATO\HP Color LaserJet 4600 PS	~

• Click OK.

New email queue

Use this option if you have an email template queue to copy.

To create a simple email queue from an existing template:

- Select New e-mail queue button from the top menu.
- The **Simple email queue** dialog box pops up.
- Enter the **Name** of the queue.
- Choose the **Template** to copy.
- Choose the Form to be used in the queue. The available forms in the dropdown menu display in the format of form name (datafolder name), for instance, statement (formtrap), where statement is the form name and formtrap is the datafolder name.
- Select either SMTP or Outlook (MAPI) for the Engine option.
- Fill in the **Title**, **Subject**, and **Body** of the email. Use an associated file variable by quoting the associated file name in square brackets "[" and "]" (for example [Invoice No]) or leave "as is" to use specific Associated File fields (for example SMTPTo, Subj and SMTPBody).

	nail queue
Name:	Simple Email Queue
<u>T</u> emplate:	ps template
Form:	PS statement (formtrap)
Engine:	⊙ SMTP ○ Outlook (MAPI)
<u>⊺</u> itle:	Statement
<u>S</u> ubject:	[month] Statement
<u>B</u> ody:	This is the body.
	OK Cancel

More information on Using Associated Files in FTSpooler Queues Properties see page 113.

• Click OK.

New identification queue

If the queue being created receives input that needs to be identified and routed, and is similar to one of the templates, use this to create it. The new queue's properties can be modified as necessary.

To create a simple identification queue from an existing queue:

- Select New identification queue button from the top menu.
- The Simple identification queue dialog box pops up.
- Enter the **Name** of the queue.
- Choose the **Template** to copy.
- Choose the **Rule** file to be used in the queue.

• Choose the queue to be replicated to the selected queue, and click the **Apply** and move to the next rule button to continue. One queue per rule must be entered.

Simple ide	ntificatior	i queue 🛛 🔯			
Name:	Simple Identification Queue				
<u>T</u> emplate:	ps templat	e 💌			
<u>R</u> ule file:	stmt	~			
Rule and r	eplication rela	ationship			
Statemen	t_Email	Statement Email			
		Apply and move to next rule			
Rule		Queue			
Statement Statement Statement ID FAIL	:_File :_Print	Statement Email Statement File Statement Print Failure			
		OK Cancel			

• Click OK.

Create a template Queue

A template queue can be created as the "to copy" queue for other queues that share it's standards.

To create a template queue:

- Right click and select New template from the list.
- Update the queue properties in the **Properties Bar** (at minimum **Queue name** on the **General** tab).
- Save the queue as a named template.
- Describe the queue in the name (for example Print Queue PCL) and set all of the standard tabs to match your most common queue type.

Delete a Queue

Deleting a queue also removes link(s) to other queues, requiring manual reconfiguration if the deleted queue is referenced.

Delete a queue

To delete a queue:

Select the queue(s) to be removed.

- Click the **Delete** button, or right click the queue(s) and select the **Delete** option.
- A dialog box pops up to confirm the deletion process. Click **Yes** to finish (or **No** to fix the listed queue(s) first).
- If the queue is in used in any other queue(s), reconfigure those queues manually.

FTSpoo	ler 🛛 🔯
?	The following queues have references to this queue: TCG Local report You will need re-configure them manually. OK to delete? Yes No

Write down the queue names indicated and fix them immediately.

Queue Properties

Select the queue to change by highlighting it. Update the queue settings in the Properties Bar on the right side of the FTSpooler Window.

General

This tab defines the queue and its Data Input Method, Notification and Archive properties.

General	Proces	sing	Filters	Print	Email	Fax	File	Applications
Queue na	ame: C	ybero	nics		1			
Data In	nput							
Input	services:							
	e printer	(LP)		Securi	ty			
	system ned pipe			Option				
I ACI	ned pipe			Copdo				
Notify								
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	ation Ty	pe:						
Do no	t notify				~			
E-mail	address	Iname	@domain)	i i				
			Contrainty					
Archive	•							
⊘ Nu	mber of c	lays to	keep rec	ords;				
2		1						
		-						
Treat	absence	ofred	ipients as	an error				
Keep	replicatio	n orde	r					
		_		-				
App	ly	Re	estore	1	Help			

Queue name must be supplied and unique.

Three **Input Services** of **Data Input** to FTSpooler are available: Line Printer(LP), **File System**, and **Named Pipe.**

- Line printer allows users to treat the queue as a printer. You may:
 - use lp/lpr from Unix
 - define and write to an LPR printer from Windows
 - use a "Work Station Customization Object" from a AS/400 to "print" files directly to the queue

More information on Unix LPR Printers see page 88.

More information on Windows LPR Printers see page 85.

• **File system** allows the user's application or a copy statement to write a file directly to the queue folder. Queue folders are by default located under the SpoolRoot folder, normally located below the FTSpooler folder. This is the normal path and file name to the queue folder Sample Queue shown in the screen shot, file name can be a constant:

C:\Program Files\TCGIS\FTSpooler\SpoolRoot\Sample Queue\filename.txt

More information on File system see page 84.

• **Named pipe** allows the user to pipe data from their application to a queue, provided the application is able to directly use a pipe. FTSpooler generates a pipe called \\Serv-erName\pipe\QueueName (where ServerName is replaced with "." (dot) if writing from an application on the FormTrap server to the queue on the same machine).

More information on Named pipe see page 84.

Notify notifies users about completion of a job via e-mail. Choose to **notify on success**, **notify on error**, or **always notify**, from the **Notification Type** dropdown menu. Enter a valid email in the **E-mail address** line.

Archive enables you to specify the Number of days to keep the records for this queue.

No recipient to the queue is reported as an error if the option **Treat absence of recipients as an error** is checked. This reports an error when no direct output (such as an email recipient) is activated for a document.

Keep replication order processes split documents from the one input file in arrival order, effectively single-threading the queue. This is the default and can be unticked. Unticking allows multiple threads (to the limit in **Setup**, **Settings**, **Maximum** ... **threads**) meaning the job will process faster with unpredictable output order.

Click the **Apply** button to save the changes.

Security for File system and Named pipe

This setting determines which users or groups have write permission to this queue, meaning you have tight security control over who is allowed to send data to FTSpooler. **Default** is the common selection and provides the same inherited security setting as the folder above the queue folder. **Unrestricted** provides full write permissions to all users while **Access control list** allows addition/removal of specific users or groups allowed to write to this queue.

Security		2 🔀
Access Default: Unrestricted Access control lit	st	OK Cancel
Users, Groups:		
Domain\User	System	
<u>A</u> dd	3emove	

To add the Users or Groups for Access control option, click **Add** button and enter Name and System name for the user.

User	? 🔀
Name	ОК
<u>S</u> ystem:	Cancel

The **Line printer** selection (unlike **File system** and **Named pipe**) uses IP Addresses to secure jobs. The **Add locals** button automatically adds all local IP Addresses to the list. **Flip permission** allows the selected IP Address permissions to be set to the reverse of what is currently shown (i.e. locked or unlocked).

S 10.*	S 172.30.*	New
🗟 192.168.* 💐 172.16.*	🗟 172.31.*	Edit
172.10 . 172.17.*		
172.18.*		Remove
S 172.19.*		Add locals
S 172.2?.*		The second second
		Elip permission

File system: Folder options

In this dialogue box define whether this queue folder is shared across the network:

Folder options	? 🔀
	ОК
O Share O Do not share	Cancel

- **Unchanged** FTSpooler does share or remove share for the folder. The system administrator takes responsibility for sharing this folder on the network.
- Share makes the queue folder available as a network shared object.
- **Do not share** hides this folder from the network.

Named pipe options

This allows the pipe type to be defined as either **Asynchronous** (returns control immediately meaning the transfer takes place as a background task) or **Synchronous** (meaning the pipe maintains the current thread until data has been transferred). For synchronous pipes, enter the **Number of instances** (concurrent instances), keeping this number as low as possible.

Pipe options	? 🗙
Pipe type • Asynchronous	
Number of instances:	
ОК	Cancel

- Asynchronous: number of users is not limited.
- **Synchronous**: number of instances controls how many users can use the pipe simultaneously.

Processing

Select a rule file for the queue under the **Resolve** list, if multiple document types are processed by this queue or the input file needs to be split into individual document files. Leave as **No rules (resolved)** if this queue processes without rules.

Then select the data file from **Data folder** list.

For No rules (resolved):

- To select a form, click on the **Select forms** button (right) to open the dropdown list and select one or more forms to be used to format the input file. Click **OK** to finish.
- To select a queue, click on the **Select queues** button (right) next to the panel to select one or more queues to replicate (copy) the input file to. Be careful to not create circular dependencies i.e. Queue "A" replicates to Queue "B" that replicates to

General	Processing	Filters	Print	Email	Fax	File	Applications	
<u>R</u> esolve:	No rules (res	olved)			Formatt	ing <u>a</u> nd re	plication:	
Format					A.	statemer	it i	Select forms
<u>D</u> ata fo	older:							Select queues
PS fo	rmtrap			~				Remove
Option	A							
-xcolo	ć							
Associa	ated file entries	8						
As we	ll as			~				
					-			
		estore		Help				

Queue "C" that passes it back to Queue "A". This will result in a loop and eventually an error.

With **Resolve** (rule file) selected:

 Once the rule file is selected it's document entries are displayed in the Formatting and replication panel as top-level elements. The special ID FAILURE entry is used when files cannot be identified.

General	Processing	Filters	Print	Email	Fax	File	Applications	
<u>R</u> esolve:	ftstdsplit				Formatt	ing <u>a</u> nd re	plication:	
Format	ting					Invoice		Select forms
<u>D</u> ata fo	older:				0.0	💮 Invoi Purchase		Select queues
1	ne Queue does	not forma	it data	~		🚫 Purch Statemer	hase Order pt	Remove
Option	s:					🔅 State	ement	
Accocit	ated file entries				0.0		ice Advice Ittance Advice	
As we		4		~	8	ID FAI		
Арр	ly <u>R</u> e	estore		Help	į			

• For each entry in the list, you can use the **Select forms**, **Select queues**, and **Remove** button to both process and replicate these entries.

To add a form or queue, tick the items from **Available items** list, and then you will see them as **Selected items** appearing on the right panel. Click **OK**.

Ticking the option **Form name is embedded into the input data** expects a form selection within the input data **(##F#formname#)** and ignores any selected form name.

vailable forms:	Selected forms:
creditnote purchaseorder remittanceadvice	statement
taxinvoice	

To remove a form or queue, select on the item(s) from the **Formatting and replication** panel, either press the **Delete** key, or the **Remove** button.

Formatting options

Formatting Options allow users to specify general formatting preferences for the forms being processed by the queue. This is typically used to overwrite the color default - xcolor or xnocolor.

Option	Description			
All options must be in the format -x[option]. Multiple options should be sep arated by a comma. For example, -xnocolor,nopjl				
-xcolor/ -xcolour	Use color commands.			
-xnocolor/ -xnocol- our	Do NOT use color commands (default).			

Option	Description
-xfastimage (default) / -xbestim- age	Image Scaling is the most intensive task performed by Form- Trap. Image scaling is required only for substitution images where FormTrap offers two modes for processing: FastImage is the default setting and scales at the same
	resolution as the original image, producing the output file quickly with a smaller image. This option is UNSUITA- BLE for low resolution images (typically 72 dpi images). Please review your substitution library for low dpi images and replace them with images of 300 dpi or above for preference. Consistency of images will produce consist- ency of output quality.
	BestImage scales to 300 dpi, regardless of the original image dpi. This produces good quality images slowly. This is required if you have low resolution images in your substitution library.
-xres	Use high-resolution user-defined PCL fill patterns (default).
-xnores	Do NOT use high-resolution user-defined PCL fill patterns.
-xpjl	Use HP Printer Job Language before and after print job to setup printer and reset it (default).
-xnopjl	Do NOT use HP Printer Job Language before and after print job to setup printer and reset it.
-xgl2	Use HP GL/2 for advanced PCL drawing (default).
-xnogl2	Do NOT use HP GL/2 for advanced PCL drawing.
-xbigfont	Turns on support for sending True Type font headers to PCL printers that are larger than 32767 bytes (default).
-xnobigfont	Type 2 font headers (under 32Kb) are used when sending downloaded fonts. REQUIRED for Lexmark T63x, T64x and T65x printers and all others that do not support Type 3 font headers.
	Note: Default is nobigfont for version 6.3 and lower, bigfont for version 6.4 and later.

FormTrap:

💦 Core components	FTSpooler Version 7.3.001.						
🗐 Archive	Home directory (%fthome%):						
Settings	· · · · ·						
Filters	C:\fthome\v7						
	Install directory (%ftinst%):						
	C:\Program Files\TCGIS\FTSpoolerV7\						
Data input							
File system	Formatting						
👳 LP (Line printer)	(Version: 7, 2, 0, 3)						
👰 Named pipes	Location of the forms:						
Delivery	%fthome%\data						
👰 Print servers							
🚔 Printer licensing	Location of the common substitution files:						
🖂 E-mail	%fthome%\subst						
Applications							
Monitor	Identification and split						
A							
	Version: 2, 0, 9, 0						
	Location of rule files:						
	%fthome%\rules						
	Page normalisation (repagination)						
	Version: 2, 1, 0, 4						
	Version. 2, 1, 0, 4						
	Save Restore						

See Setup, Core components, Formatting, Version:

For Asian and any other double-byte fonts, please set all **Queues**, **Processing** tab, **Options**: to $-\mathbf{s}$. This speeds up FormTrap by a factor of 10 or more. For additional details see Asian Fonts in the www.formtrap.com Knowledge Base. $-\mathbf{s}$ is another parameter in this list and should be space separated from the $-\mathbf{x}$ parameter.

Associated file entries

An Associated file is produced by the Print Logic when the document is created. The associated file may contain information on the delivery requirements of a document, or may contain user-specified data. Entries in the file are represented using a **name=value** syntax, where "**name**" refers to the field name identifies the data contained in the "value". e.g. **emailto=user@domain_name.com** the **user@domain_name.com** is identified as the value of an **emailto** field.

More information on Associated files see page 93.

The advantage of the facility is that each document in any given batch can be handled according to its specific delivery requirements, without having to initially separate the jobs in the originating application.

When either **value** is blank or the **name=value** entry does not appear, the document will be handled according to the Associated file options as set in FTSpooler.

There are four options for Associated file entries:

- **As well as** All the delivery method(s) i.e. email/ fax/ print, specified in the Associated file and those specified in the queue properties are used.
- **Ignore** The delivery method(s) specified in the queue properties are used; Associated file delivery method(s) are ignored.
- **Overwrite (recipients of the same type)** If the delivery method specified in the Associated file and the delivery method specified in the queue properties are the same (e.g. both print) then the delivery option specified in the Associated file is used.
- **Overwrite (all recipients)** Delivery method(s) specified in the Associated file delivery options are used. If there is no delivery method (i.e. recipient) specified in the Associated file, the delivery method specified in the queue properties will be used.

Click the **Apply** button to save the changes.

Filters

Filters modify the input and output files, and the modified file MUST be returned to the Spooler. You may use either standard filters supplied with your Spooler or programs written in most computer languages, including Visual Basic. Most input files are passed through a local language to UTF-8 filter (commonly Western filter) and filters may be used on output to invoke special commands such as stapling on printers supporting those features. You may include your own programs as filters.

Note: FTLabelPrint should be invoked as an Application, NOT as a filter as it does not return a modified file to the Spooler.

External input filters deal with data that enters FTSpooler system from external sources. The primary objective of these filters is character set normalisation – conversion of input data to UTF-8 encoding. It is strongly recommended that every queue has a relevant filter. For users of English speaking (and other Roman language) countries it would be the "Western" filter. Other filters such as "Simplified Chinese" are also available for the customers using different languages. Among the other standard filters are: PCL5 escape filter, AS400 filter, filter to convert single carriage returns to line feeds.

Pre identification filters are invoked on all data before the identification step. The primary objective of these filters is to normalise the data itself so it can be identified and formatted. There are no common types of these filters – they are usually developed on per-customer basis to solve specific problems and tailor the system for your requirements.

More information on the Replace filter see page 134.

Post formatting filters provide access to FormTrap output (for example to add documents such as product data sheets to the FormTrap document, or insertion of stapling commands for printers). The output file (PCL or PCLXL (PCL6) or PostScript) is still to be delivered, so now incorporates any modified information.

Associated file (data elements) filters access the associated data file. The reasons to have associated file filters include lookup of e-mail addresses for SMTP, adding properties using external database, etc. There are a few associated filters provided by default:

- Assoc_add adds name=value pair to the end of associated file
- Assoc_name_replace replaces existing name with another name
- **Assoc_order** suppresses values of multiple identical names leaving only the first of the identical names

Use Setup (top level menu) and Filters to see detailed descriptions of the filters.

There are a number of pre-defined filters available in FTSpooler, or you can use your own customized program. Left click **Add/Remove Filter** to pop up a list of pre-built input **Filters**.

Click the **Apply** button to save the changes.

Define Filters

In the **Filters** window, select the input document type from **Show filters by input type** dropdown menu, this returns a list of available filters. Select a filter to view its description below, click **Add** > to add it to the **Active Filters** list. Order of execution of the filters can be changed using the four buttons to the side.

- First the selected active filter is moved to the top.
- **Up one** the selected active filter is moved one position up.
- **Down one** the selected active filter is moved one position down.

• Last - the selected active filter is moved to the bottom.

Available filters		Active Filters (in orde	First
PCL and Postscript (pcl, ps)			
PCL2TIFF			Up one
PS2PDF ps2tiff-works			
	Add >		Last
	Remove		
Converts PCL to tiff. Use			
generally for faxing purposes			
Make sure your formatted data is PCL			
<u></u>		4.2	

- To remove a filter, select an Active Filters and click Remove.
- Click the **OK** button.

Print

To print FormTrap documents, FTSpooler needs a PCL5 or PCLXL (PCL6) or PostScript compatible printer installed on the system.FormTrap uses only the printer's physical location and needs only one printer defined to print in **any** of that printer's available languages. You can print in (say) PostScript by selecting a PCL printer and vice versa. Selecting multiple printers prints one copy on **each** selected printer.

eneral	Processing	Filters	Print	Email	Fax	File	Applications	
ماطحاندي	Printers (pleas	e use DCI	or Books	wint evicto				
	Enincers (pieas	e use PCL	OF POSIDI	npc prince	rs only);			
Fax	TOUD Colour	7 -1-47						
	\TO\HP Color La \TO\HP LaserJe							
	TO\HP Color La							
	to\HP Color Las							
	to\\\NETGEAR\I	P2						
	ius\ j4100							
\\\aris	totle\ge							
Print Fil	lters		3					
Curren	ntly defined filte	ers:						
No filte								
no mee	ers decined							
	ers derined		-					
	<u>D</u> efine filter:	5	٦ L					
		5						
		5						
		5						

Select printer(s) from the available list for the queue.

Click the **Define filters** button to choose the filter(s) for the printer.

More information on Print to ANY Windows Printer see page 31.

Click the **Apply** button to save the changes.

Email

Email tab allows you to send email via either SMTP or Outlook (MAPI).

SMTP (Simple Messaging Transfer Protocol) is an alternative delivery mechanism to Microsoft® Outlook/Exchange (MAPI) and is a reliable and stable method for emails. Email addresses must be in standard recipient@domain.com form as address books are not available. You must configure your SMTP settings before using this option.

Our recommendation is SMTP as the Email delivery mechanism.

Note: Several factors impact SMTP, particularly:

- Windows inconsistencies between operating system and software versions.
- Impact of anti-spam software, some of which does not work under load.
- SMTP protocol itself which is fragile to user errors (for example, leaving out the @ in an email address)

Please look at Archive, Errors and Archive, Log for additional error messages when you have issues with SMTP.

Known items are summarized in this article from the Knowledge Base which we maintain as new items present. You should read this before proceeding further.

- · www.formtrap.com and enter your User Id and Password
- Select Knowledge Base
- Use keyword anti and look at the single article that presents

How SMTP is handled by the Spooler see page 25.

More information on SMTP and Associated Files see Reserved Names see page 117.

Microsoft Outlook uses Microsoft Messaging Interface (MAPI) to deliver jobs to e-mail, fax or other types of recipients supported by MAPI. MAPI is installed as a part of Microsoft Outlook with only e-mail enabled by default. Use of this delivery mechanism requires prior setup of the profile used to access MAPI. You must configure your Mail Profile before using the Mail option.

Email is normally activated using Associated File entries with or without any default option overridden by the Associated File. Like any of the "special delivery" methods, the **Properties** tab, **Associated file entries** prompt must be set correctly.

More information on Outlook (MAPI) and Associated Files see Reserved Names see page 117.

To set the properties of emailing:

- Select the email option to be either **SMTP** or **Outlook (MAPI)**.
- Enter the email attachment title in the **Title** field. You may use an associated file variable by quoting the associated file name in square brackets "[" and "]". For Example, quoting **Your Order [PO Num]** would deliver "**PO22344**" from the associated file line **PO Num=PO22344** to give **Your Order PO22344**. Take care that your data fields do NOT contain characters that are illegal for Windows file names (*\.: and so on). These may cause the email to abort with an error message.
- Click the **Define attachments** button to specify the attachment filter(s).

More information on Define Attachmentssee page 21.

• Enter the **Subject line** (normally overridden by the Associated File name **Subj**) and **Body** (from the standard file quoted in the Associated File name **EmailBody** or the text entered in **Body** below).

More information on Using Associated Files in FTSpooler Queues Properties see page 113.

- If you are constructing the title yourself, you may use square bracketed ("[" and "]") associated file fields, as for **Title**.
- Enter valid email address(es) in the To, Cc, Bcc, and From fields.

eneral	Processing	Filters	Print	Email	Fax	File	Applications			
Manag	e settings for -				Recipier	its and Se	ender -			
⊙ sm		utlook (M/	API)		<u>Ι</u> ο:	user_	_A@domain.com			
Attach	ment				<u>⊆</u> c:					
<u>T</u> itle:	email_title				Bcc:					
Curre	Currently defined attachments:					user	_B@domain.com			
PS2PI	DF <u>D</u> efine attachme	ents			Use fo	Use format like: Mary Smith <mary.smith@company.com>;</mary.smith@company.com>				
	t and body ct line:			- i						
This is	s the subject lin	e.								
<u>B</u> ody:										
This	This is the body.									
APF	oly <u>R</u> e	estore		Help						

• Click the **Apply** button to save the changes.

How Email is handled by the Spooler

The Associated File is produced during document formatting by the Spooler. If the form contains an Associated File entry for SMTP Email (SMTPTo=emailto@domain.com) or the Email tab within Queues contains a direct email to address, an email could be sent.

These additional conditions are required to send the email:

Queues, Process tab, Associated file entries: is NOT set to ignore

Associated file entries:	
As well as	-
As well as	ł
Ignore	
Overwrite (recipients of the same type)	
Overwrite (all recipients)	

Email Address is properly formed in the SMTPTo Associated file entry:

SMTOTo entries with blank email addresses are ignored (effectively do not exist.)

Email addresses without an @ will cause SMTP to fail - they look like web sites - (see KB).

Email addresses with multiple @ or . (full stop) symbols will fail but SMTP will be recovered after that transaction (from Version 7.4.004). See KB.

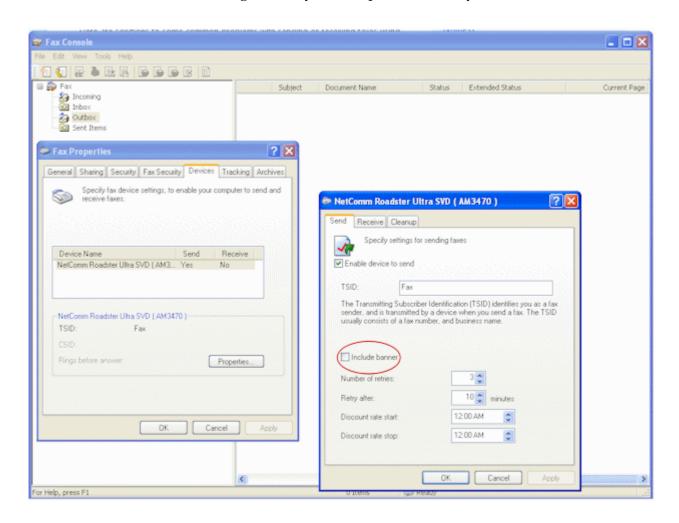
Fax

This option sends FormTrap documents as faxes using Windows Fax Service.

Windows Fax Service requires the fax configuration in **Microsoft® Fax Console.** Instead of a fax machine, you can use a modem and scanner to send or receive faxes from your computer. The modem and scanner have no specific requirements. FormTrap does not use the scanner and deals with outgoing faxes only.

More Information on Configuring Windows Faxes in Windows XP or, alternately you can go to **Start** menu - **Help and Support** - search for fax to see relevant articles.

Note: You must change Windows Fax and untick **Include banner**, this is the screen for XP-Pro and is similar for later operating systems. Please see the Knowledge Base if you have problems with your initial fax tests.



Windows Fax Service is normally activated using Associated File entries with any default option overridden by the Associated File. Like any of the "special delivery" methods, the **Properties** tab, **Associated file entries** prompt must be set correctly.

More information on Windows Fax Service and Associated Files see Reserved Names see page 117.

To set the properties of faxing:

• Click **Define document type** to specify the document type. Fax requires TIFF for faxing so select the filter that converts from your document type (as indicated in Processing tab, Data Folder) to Tiff; i.e. one of :

PCL to Tiff where Data Folder is marked as PCL

PCLXL to Tiff where Data folder is marked as PCLXL 🅰

PostScript to Tiff where Data folder is marked as PostScript

More information on Define Document Type see page 21.

- The usage of Cover page is OPTIONAL. The Cover page must be first created using Windows Fax Cover Page Editor. You can launch it from Start - All Programs -Accessories - Communications - Fax - Fax Cover Page Editor, create, edit and save your cover page. In FTSpooler fill in the Cover page name i.e. the full path of the cover page, Subject line, and Body. You can use associated file variables for Subject line and Body.
- Use an associated file variable by quoting the associated file name in square brackets "[" and "]". For Example, quoting **Your Order [PO Num]** would deliver "**PO22344**" from the associated file line **PO Num=PO22344** to give **Your Order PO22344**.

More information on Using Associated Files in FTSpooler Queues Properties see page 113.

- Select one of the three **Schedule** options: **Immediately**, **Off peak** and **At specified time** (**Time** required).
- Select one of the three **Notify** options:
 - Do not notify
 - **Email to sender** requires a special email SMTP notification process (mailnfy.exe to run in the background).
 - Email to inbox only works with Microsoft® Exchange.
- Click the **Sender**, **Recipients** button to manage the details of the fax sender and recipients. This is the default and is normally overwritten by the Associated File field W2KFax from the document.

neral	Processing	Filters	Print	Email	Fax	File	App	olications
	ent type to fax intly defined do			j	Option			Time:
		comencity	pesi			diately	~	10:17:44 AM
PCL2TIFF								Address:
D	efine document			Notify Do no	It notify	~		
Cover	page					nder, Rec	inients	
Cover	r page name:				<u> </u>	inder, Kee	lipiencs	
Cove	r page name			34				
Subje	ct line:							
This is	s the cover pag	e subject l	ine.					
Body:				-1-				
	is the cover pag	a bodu		A				
11021		,0000,1		180 V				
				9				
1								
			_					
APP	oly <u>R</u> e	estore		Help				

Click the **Apply** button to save the changes.

Manage the sender and recipients information

To manage the sender and recipients information:

• Enter sender information sender's Name, Department and Company.

lame:	For	mTrap	1	ОК
epartment:	De	velopment	Cance	
ompan <u>v</u> :	TC	G Information	Systems Pty	
ecipients Number		Attention	Company	Add new
02 9310 517	2	Support	TCG Info	Edit

• Click the Add new, Edit or Delete button to change the recipient lists.

Recipient p	02 9310 5172
Attention:	Support
<u>C</u> ompany:	TCG Information Sy
ОК	Cancel

File

This option delivers FormTrap standard output files to a specified directory, as well as the opportunity to run processes over the FormTrap output.

To set the properties of output to file:

- Enter the full **Destination folder** path of where to save the file to. Environment variables are accepted. See notes following the image below if you are attempting to write to a network drive.
- Enter the **File title**. Use an associated file variable by quoting the associated file name in square brackets "[" and "]". For example quoting **[PO Num]** would deliver "**PO22344**" from the associated file line **PO Num=PO22344**. Make sure that your data fields do NOT contain characters that are illegal for Windows file names, **(*\.:** and so on). These may cause the file save to abort, with an error message.

Note: See details in the Knowledge Base for a filter that is available (at a charge) that removes illegal characters in potential folder and file names.

More information on Using Associated Files in FTSpooler Queues Properties see page 113.

- Select any standard files you wish to add to output. There are three types of standard files: **Output file** (PostScript (.ps) or PCLXL (PCL6) or PCL5 (.pcl)), **Associated file** (.af) and **Input file** (.txt).
- Click **Add/Remove** to edit which (if any) output conversion filters should be used to add additional files (commonly .pdf files).

More information on Define Output Filters see page 21.

• Click the Apply button to save the changes.

General	Processing	Filters	Print	Email	Fax	File	Applications	
Destinat	on folder:							
F:\TCG\								
%fthom c:\formt	use environmer e%\output files rap\output files (optional, defau			oath, exam	iples:			
	ment]\[custome			-id]\[invoid	:e-id]			
as defini [departn invoice Standard Output Assoc Input Output Currer PS2PD	ut file ciated file (af) file (txt) : filters (addition ntly defined:	ucture, ex -name]-[c	amples:					
	ly <u>B</u> e	estore		Help				

Notes on writing to network drives:

When the output folder is located on a network, both a UNC path (\\server\folder) or a mapped drive (Z:\Folder) may be used.

Mapped drive(s) must exist for the user account that runs the FormTrap service (drive mappings are maintained per user account). Please check by interactively logging in as the user that runs the FormTrap service. The drive(s) should be mapped permanently. If you are running the FormTrap service using a LocalSystem account you will not be able to log in as the user account running the FormTrap service and **will not** be able to output to the mapped drive.

In both cases you need to ensure the user account that runs the Formtrap service has sufficient privileges to read and write to the required folder.

Drive errors as above show up in the Archive, Errors list as (for example) "**Z:\Folder is not a directory**. " when that folder exists.

Applications

This option allows the use of customized third party application(s), including user-written programs. The programs do not produce a modified file for continued spooler activity, instead they are used for discrete user-specified purposes unrelated to FormTrap processing.

Note: FTLabelPrint is invoked as an Application.

More information on Application Setup see page 79.

To add a customized application:

- Click the Add button to add a new application.
- Select the required application from the Name list.
- Enter **Recipient** for the application if required, otherwise key the hyphen (-) meaning no recipient.
- Click the Add/Delete button to edit the filters.
- Click the **Apply** button to save the changes.

General	Processing	Filters	Print	Email	Fax	File	Applications	
Applicati	ons:							
1940	ssigned			Propertie Name:	s			
				- Constanting	assigned -	*	~	
				Recipier	nt:			
Ad	d D	elete		docume	nt to the	n does not recipient p acter (-) in	lease place	
	oly Re	estore		Help				

Print to ANY Windows Printer

Overview

This facility is only available for PCLXL (PCL6) files where the "Print to ANY Windows Printer" chargeable option is included in their FormTrap system. Files must be generated through a queue with a Data File showing the PCLXL (PCL6) symbol.

To print to other Windows printers, use a filter for each different printer you want to print to.

The table shows relative file sizes from which the demands of the process, especially for PostScript, is shown. Converted files are larger by a factor of 20 - 30 over the equivalent direct outputs, although the PDF file produced from PostScript is still small and efficient.

A four page "Accounts Report" formatted with FormTrap in Arial True Type font, compressed down from a seven page original was used as the text file. The form file and data files may be downloaded from here:

Download PCLXL-to-Any-Windows.zip

Printer used is an HP Color LaserJet 4600 printed in B&W with no logos:

Print Language	File size - Bytes
Original Text File	34,025
PCL5	172,761
PCLXL (PCL6)	305,708
PostScript	351,542
PDF from PostScript	74,128

Converted via printer drivers from the original PCLXL (PCL6) file via filter:

Original PCLXL (PCL6)	05,708
to Canon iP100 ink jet	3,620,241
to PCL	5,599,651
to PostScript	10,074,461
to PDF from PostScript from	142,213
PCLXL	
to PCLXL	632,033

Setup

Filters are required to print to other windows printers from PCLXL (PCL6). Please set up individual filters for each printer you wish to use. PostScript output can also be set up this way (at around 30 times the size, with corresponding processing time).

To Define a new Filter

1. Open the Filters tab and use the **PCLXL to Printer** filter as a model.

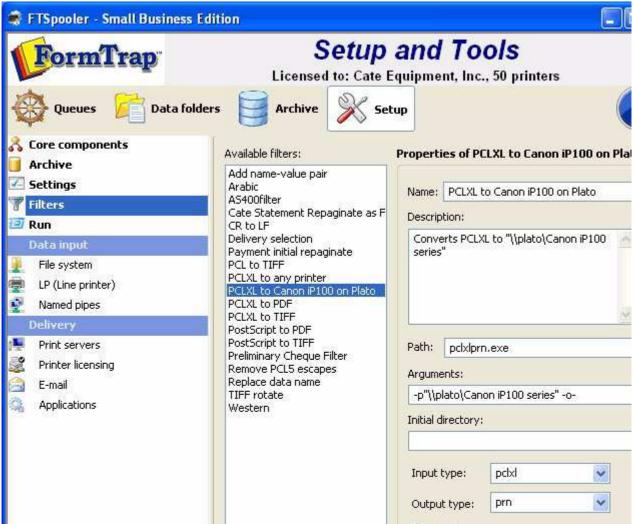


2. Go to Start, Printers and Faxes, select the required printer and go to Properties.

🗞 Printers and Faxes			
File Edit View Favorites Tools Help			
🜀 Back 🔹 🕥 😁 🏂 🔎 Search 📂 Fo	olders -		
Address 🦦 Printers and Faxes			
Name 🔺		Documents	Status
Printer Tasks 🛞 🚺 Canon IP1	00 series on plato	0	Ready
Add a prin Canon iP100 series on plate See what Select prin preference Share this Canon iP100 series on plate General Sharing Ports Advar Canon iP100 series Canon iP100 series	to Properties iced Color Management Security Color Management Copy 1 Cut Copy Pastels Delete		
See Also Model: Canon iP100 serie Web site	Select All		
So to prin Color: Yes	Paper available:		
Double-sided: Yes Other Places Staple: No	A4 e copied name in place of the		

Select the **printer name** as shown and copy the name.

3. Set up a new Filter. Paste the copied name in place of the **printer name** in **Description** and **Arguments**. If the printer is via a Print Server (**on Plato** in the example),



include that into the **printer name**, as \\<u>server</u>\ (<u>\\ plato</u> \ below).

- 4. Replace Printer in the **Name** with a modified version with no slashes (and short enough to be able to see all the description). This is the final Filter:
- 5. Replace Input type with pclxl and Output type with prn.
- 6. Check these under **Output type**:

Check status

Require output

Use standard input/output

Hide console

Hide GUI should be Unticked

7. Save to record this as a new filter.

To print to any Windows Printer

Your queue must have a PCLXL (PCL6) Data Folder selected, PCLXL is represented as this symbol:

In the Print tab:

Select the printer from the list and select the corresponding **Filter** from the list. **Apply** to finish.

Queue Tools

Overview

The **Check Integrity** tool verifies completion of queue setups, such as replication, formatting, and data validity and is useful in troubleshooting.

Warnings are shown in blue with errors in red.

Check Integrity	?
Thecking queue [Remittance Advice File] ok	~
Thecking queue [Statement File] ok	
Thecking queue [Simple Print Queue] annot find data folder [purchaseorder] Trror detected in queue Simple Print Queue	
Thecking queue [Simple Email Queue] annot find form: [formtrap] irror detected in queue Simple Email Queue	
Thecking queue [Failure] Jo formatting or replication defined, queue will archive only or deliver data file unformatte Jk (with warnings)	d 🗌
Thecking queue [Simple Identification Queue] annot find filter [FAX (portrait tiff)]] Tror detected in queue Simple Identification Queue	Ш
7 queues have been checked, 3 have errors	~

Batch Update

The **Batch Update** tool allows the same action to be taken on selected or all queues. There are three types of actions to be taken:

- Add append another value to a present value list where more than one value may exist, for example, a new delivery filter.
- **Replace** find an old value and substitute a replacement value, for example, replace a form with a new form.
- **Set** update a value that is unique to the queue, for example, days to keep the records, or notification address.

To process a batch update:

- Select **Batch Update** from the **Tools** button in **Queues** section. The list of actions are displayed in the Batch Update window. Select the **Action** to be taken.
- Enter the **Old value** if applicable, and **New value**.
- Select the **Scope** of the action.

• Click the **Update** button to finish.

Add delivery filter Old value: Add external input filter Add preformatting filter Replace filter New value:	
Kepidce form -	
Replace replication queue Replace rule name Set days to keep records Set email sender address Set form location Set notification address Set rule file	
	Update

Changing ownership of queues

- To allow a normal user (not **Admin**) to view archives for queues, the user must be the owner of those queues.
- The owner of a queue will be able to see archives for the queue and may also be able to edit the queue unless restricted, see Setup Users.
- Highlight the queues that the new owner should be able to view.
- Select **Batch Update** from the **Tools** button in **Queues** section. The list of actions are displayed in the Batch Update window. Select **Set queue owner**.
- Enter the user's name in **New value**:
- Set **Scope** to **Selection**.
- Click the Update button to finish

Data Folders

Manage Data Folders

Data folders store the expanded contents of your FormTrap load (.ASC) file, created in FTDesign as well as rule files and substitution files. The contents include the form(s) definitions and data related to front and printer handling used by the formatting processes.

Create a Data Folder

To create a new data folder:

- Select Data folders from the top Navigation Bar.
- Click the New Folder button. The Data Folder dialog box pops up.
- Enter a Folder Name, for example, formtrap.
- The **Use private substitution files for this data folder** option permits the data folder to have its own substitution files instead of the common substitution files.

More information on Add a Substitution File see page 41.

• Click OK.

Eolder Name:	ОК
formtrap	Cancel

Open						? 🔀
Look jn:	🙆 My Formtrap I	Load Files	~	00	• 🛄 🥙	
My Recent Documents Desktop	statement_apr statement_ma					
My Documents						
My Computer						
S	File <u>n</u> ame:				~	<u>O</u> pen
My Network	Files of <u>type</u> :	Load files (*.asc)			~	Cancel

• The dialog box pops up to allow you to locate the load (.ASC) file.

• Choose the load (.ASC) file to add and click **Open** to finish the reloading process. Forms within the load (.ASC) file are added to the data folder.

Reload the Forms of the Data Folder

To reload the data (.ASC) file to the data folder:

• Select either the data folder name i.e. **formtrap** in our example or **Forms** underneath.

FormTrap	Data folders Licensed to: Me, 77 printers	
Queues 🔀 Data fo	olders 📴 Archive 💥 Setup	
Folder properties A Rel	Dead forms 🔚 Add split rules 👔 Add substitution files 🕅 X Delete Folder Forms Dependent queues	. 😽 Refresh

- Click the **Reload forms** button.
- The dialog box pops up to locate your load (.ASC) file.
- Select the load (.ASC) file to reload and click **Open** to finish the reloading process. All previous forms are removed and new forms added.

Update the Properties of a Data Folder

To change the properties of a data folder:

- Select the data folder to update.
- Click the **Folder properties** button.
- **Data folder** dialog box pops up.

• Change the Folder Name or the option Use private substitution files for this data folder. Click Ok to finish.

Eolder Name:	ОК
formtrap	
	Cancel

Delete a Data Folder

Unused data folders can be deleted from the system. Select a data folder to view its details in a tree structure. Expanding the tree will show all queues that use data folder. When a data folder is deleted these queues become invalid (since they still refer to the deleted data folder). Edit the settings of these queues to re-assign a valid data folder before deleting. To delete a data folder:

- Select the data folder to delete.
- Click the **Delete** button.
- A dialog box pops up to confirm the deletion process. Click Yes to finish.

FTSpoo	er 🛛 🛛
2	Are you sure you want to delete the data folder (FormTrap)?
	Yes No

Manage Subtitution Files

FTSpooler allows public and private substitution files to be applied to data folders. A data folder may use either its own private substitution folder or a single public substitution folder.

Add a Substitution File to the Data Folder

To add a substitution file to the data folder:

• Select **Substitutions** in the tree structure, either at root level (public) or within a specific data folder (private). To see a private substitutions folder, the option **Use private substitution files for this data folder** must be checked in **Data folder** properties.

More information on Update the Properties of a Data Folder see page 40.

• Click the Add Substitution Files button.

Open						? 🔀
Look jn:	🔁 My Formtrap	p Load Files	~	00	📂 🛄+	
My Recent Documents	substitution	<u>file_A.txt</u>				
My Documents						
My Computer						
	File <u>n</u> ame:				~	<u>D</u> pen
My Network	Files of <u>type</u> :	Substitution files (*.txt *.da	it)		~	Cancel

• The dialog box pops up to allow you to add the substitution file(s).

• Select the substitution file(s) to be added and click **Open** to finish the process.

Note: Text files must be stored in Unicode, in Notepad select Save as, Encoding and UTF-8 from the drop down list.

Delete a Substitution File from the Data Folder

To delete a substitution file from the data folder:

- Select the substitution file(s) to delete.
- Click the **Delete** button.
- The dialog box pops up to confirm the deletion process. Click **Yes** to finish.

FTSpoo	er	X
?	Are you sure you want to delete 1 substitu	tion file(s)?
	Yes No	

Manage Split Rule Files

The single Split Rules folder is at root level.

Add a Split Rule File

To add a Split Rule File:

- Select **Split Rules** in the tree structure.
- Click the Add Split Rules button.
- A dialog box pops up to allow you to add split rule file(s). Select the rule file(s) you wish to add and click **Open** to finish.

Open						? 🔀
Look jn:	🗀 My Formtra	o Load Files	~	00	• 🖽 👏	
My Recent Documents Desktop My Documents	rule_1.rul					
My Computer					_	
	File <u>n</u> ame:					<u>O</u> pen
My Network	Files of type:	Rule files (*.rul)				Cancel

Delete a Split Rule File

To delete a Split Rule File:

- Select the split rule file(s) you wish to delete under **Split Rules** in the tree structure.
- Click the **Delete** button.

• The dialog box pops up to confirm the deletion process. Click **Yes** to finish.



Archive

This section details how to use the Archive features of FormTrap.

More information on Archive Database see page 66.

More information on archive viewing for deafault (not Admin) users see page 36.

FTSpooler keeps all the job processing and delivery information in one job archive and provides different views, i.e. **All**, **Delivered**, **Errors**, **Data**, **Replication**, **Formatting**, **Working** and **Logs**.

Archive shows three panels: searching and filtering, main panel and detail panel.

View All Records

Select the **All** button under **Archive** from the top navigation bar. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows the following for each job:

- Status job status
- Date/ Time of submission
- Queue the queue the data was processed in
- **To** form(s) used in the processing the document

Between submission and delivery of the formatted document may be several steps such as input filtering, identification and routing an/or splitting, repagination and print formatting. Each step is shown in the **detail panel** located at the right side effectively showing the history of each job in most recent (top) to oldest (bottom) order.

You can select multiple records and save their documents. You can view a document in the appropriate viewer.

- **Process Name** shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":". For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.

M	ore informatio	on on Exporting	files see page	50.			
🕸 Queues 🛛 📔 Da	ata folders	Archive	Setup				
🗊 All 🤣 Delivered 🔞	Errors 🛛 🖶 Data	🍫 Replication	鵒 Formatting	🚩 Working			
🗙 Clear All 🛛 🎄 Apply filter	Page 🍋	= 1 🔹 🗳 F	lefresh 🗙 Delete	🖸 Restart		🔚 Save 🔌	/iew
Status:	Status	Date	Time	Queue	^	Process name	Document
	Error	30/07/2008	4:44:58 PM	Statement File		Restart	txt
Do not filter 💌	Success	30/07/2008	4:44:58 PM	Statement		formtrap:statement	ps
Queue:	Success	30/07/2008	4:44:57 PM	Local		smtp:PS2PDF	pdf
~	Success	30/07/2008	4:44:55 PM	Statement Print			
To:	Success	30/07/2008	4:44:54 PM	Statement			
	Success	30/07/2008	4:44:54 PM	Local			
×	Error	30/07/2008	4:43:14 PM	Statement Email			
Date range	Success	30/07/2008	4:41:50 PM	Statement Email			
From:	Error	30/07/2008	4:39:38 PM	Statement Email			
Date: 1/05/2008 🔽	Error	30/07/2008	4:39:21 PM	Statement Email			
Time: 3:43:27 PM	Error	30/07/2008	4:37:18 PM	Statement File			
Time: 3:43:27 PM 🚔	Success	30/07/2008	4:37:18 PM	Statement			
To:	Success	30/07/2008	4:37:17 PM	Local			
Date: 30/07/2008 🗸	Error	30/07/2008	4:36:11 PM	Statement Email			
	Error	30/07/2008	4:21:37 PM	Statement			
Time: 3:43:27 PM 🔶	Success	30/07/2008	4:21:37 PM	Local			
	Error	30/07/2008	4:15:38 PM	Statement Email			
	Success	30/07/2008	4:15:38 PM	Statement	~		
	<		1	>			

More information on Exporting Files see page 56.

Searching and Filtering panel

View Delivered Records

Select the **Delivered** button under **Archive** from the top navigation bar. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows the following for each job:

- Status job status
- Date / Time of submission
- Queue the queue the data was processed in
- To form(s) used in the processing the document

Between submission and delivery of the formatted document may be several steps such as input filtering, identification and routing an/or splitting, repagination and print formatting. Each step is shown in the **detail panel** located at the right side effectively showing the history of each job in most recent (top) to oldest (bottom) order.

You can select multiple records and save their documents. You can view a document in the appropriate viewer.

- **Process Name** shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":". For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.

More information on Exporting Files see page 56.

🔯 Queues 🛛 📔 Da	ata folders	Archive 🖇	🖌 Setup			
🖡 All 🕜 Delivered 🐼 🛙	Errors 🛽 🖶 Data	🍫 Replication	鵒 Formatting	🏴 Working		
$ imes$ Clear All $~~ \phi~$ Apply filter	Page 🍋	■ 1 🔹 🕴 ¢ R	lefresh 🗙 Delete	🖸 Restart	🔚 Save ᆀ Vie	w
Oueue:	Date	Time	Queue	То	Process name	Docu
	12/09/2008	3:53:41 PM	Statement File	🚖 selina@formtr.	User interface	t×t
	12/09/2008	3:53:41 PM	Statement File	🦾⊂:\Document	Western	t×t
To:	12/09/2008	3:51:02 PM	Statement File	🚖 selina@formtr.	formtrap:statement	ps
~	12/09/2008	3:51:02 PM	Statement File	🦾C:\Document	smtp:PS2PDF	pdf
	3/09/2008	11:58:42 AM	simple stmt	🚖 selina@formtr.		
Date range	3/09/2008	11:56:06 AM	simple stmt	📄 selina@formtr. 🚽		
From:	3/09/2008	11:41:01 AM	Statement File	C:\Document		
Date: 16/08/2008 🔽	3/09/2008	11:41:01 AM	Statement	🕸 Statement File		
	3/09/2008	11:41:01 AM	Local	🕸 Statement		
Time: 4:16:59 PM 🚔	3/09/2008	11:40:33 AM	Statement Email	🚖 selina@formtr.		
To:	3/09/2008	11:40:33 AM	Statement	🕸 Statement Ema		
	3/09/2008	11:40:32 AM	Local	🕸 Statement		
Date: 15/09/2008 🔽	3/09/2008	11:36:48 AM	Statement Email	🙈 selina@formtr.		
Time: 4:16:59 PM 🔶	3/09/2008	11:36:48 AM	Statement	🕸 Statement Ema		
	3/09/2008	11:36:47 AM	Local	🕸 Statement		
	3/09/2008	11:33:49 AM	Statement File	🦾C:\Document		
	3/09/2008	11:33:49 AM	Statement	🕸 Statement File		
	3/09/2008	11:33:49 AM	Local	🕸 Statement 🗸 🗸		
	<		ш	>	<	

Searching and Filtering panel

View Errors

Select the **Delivered** button under **Archive** from the top navigation bar. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows the following for each job:

• Status - job status

- Date / Time of submission
- Queue the queue the data was processed in
- **To** form(s) used in the processing the document

Between submission and delivery of the formatted document may be several steps such as input filtering, identification and routing an/or splitting, repagination and print formatting. Each step is shown in the **detail panel** located at the right side effectively showing the history of each job in most recent (top) to oldest (bottom) order.

You can select multiple records and save their documents. You can view a document in the appropriate viewer.

- **Process Name** shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":". For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.

An additional **error description panel** displays extra information for troubleshooting:

- Process Error Description a brief description of the process-generated error
- FTSpooler Error Description a full description of the error in FTSpooler

Process errors show the best information available. The information may not be meaningful or very relevant. There is no additional information available from log files.

More information on Error Messages from FormTrap Spooler see page 61.

	ta folder Errors			-	Working		
🗙 Clear All 🛛 🌣 Apply filter	Page	 + 1	🔷 🌻 Ref	resh 🗙 Delete 🖸	Restart	🛛 🔚 Save 🦂	View
Queue:	То	Recipien	Date	Time	Queue 🔼	Process name	Documer
·		void	22/07/2008	2:31:11 PM	TCG Mon	Restart	t×t
	Q	void	22/07/2008	2:31:11 PM	TCG Mon	formtrap:1stateme	nt txt
To:	Q	void	22/07/2008	2:31:04 PM	TCG Loca		
*	<u> </u>	void	23/06/2008	11:46:27 AM	Sample_F		
		void	23/06/2008	11:46:07 AM	Sample_F		
-Date range	Q	void	20/06/2008	1:58:51 PM	Sample_F		
From:	Q	void	19/06/2008	11:35:42 AM	Sample_F 🤜		
Date: 1/05/2008 🔽	<				>	<	
ocess [C:\Pr <mark>o</mark> gram Files\T	///data	\Sample_PS\	FTDATA" - 1\Temp	Copyright (c) 1 All rights reser	1995-2008 TCG Inf	ormation System	ıs Pty. Ltd.

Searching and Filtering panel

View Data Records

Select the **Delivered** button under **Archive** from the top navigation bar. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows the following for each job:

- Status job status
- Date / Time of submission
- Queue the queue the data was processed in
- Document type the document type of the selected data record
- Name the associated file entry name
- Value the value of the associated file entry

Name and **Value** repeat for different jobs, showing all of the Associated File names in that file (last to first down the page, including duplicates).

Between submission and delivery of the formatted document may be several steps such as input filtering, identification and routing an/or splitting, repagination and print formatting. Each step is shown in the **detail panel** located at the right side effectively showing the history of each job in most recent (top) to oldest (bottom) order.

- Process Name shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":".
 For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.
- Status job status
- To form(s) used in the processing the document
- Error Description errors in the formatting process

More information on Exporting Files see page 56.

🗙 Clear All 🛛 🌣 Apply filter	Page 🍋 🖨	1 4	🕴 🇳 Ref	resh 🕽	🗙 Delete					
Name:	Date	Time		Queu	ie	Docu	ment type	Name		Value
vanic.	30/07/2008	4:52:5	1 PM	Statem	ient Email	ps		ftout		-
/alue:	30/07/2008	4:52:3	6 PM	Statem	ent Print	ps		ftout		-
	30/07/2008	4:51:3	1 PM	Statem	ient File	ps		ftout		-
¥	30/07/2008	4:49:1	9 PM	Statem	ient Print	ps		ftout		-
Queue:	30/07/2008	4:48:5	5 PM	Statem	ient File	ps		ftout		-
*	30/07/2008	4:41:5	0 PM	Statem	ient Email	ps		ftout		-
	22/07/2008	2:32:0	3 PM	TCG M	onthly Sta…	ps		ftout		-
Date range	22/07/2008	2:32:0	3 PM	TCG M	onthly Sta…	ps		smtpto		
From:	22/07/2008	2:32:0	3 PM	TCG M	onthly Sta	ps		smtpto		
Date: 1/05/2008 💌	🔚 Save 📣	View			Status		То		Description	
Time: 3:43:27 PM 🌨	Process name	-	Document	type	Success)\HP L		
To:	Replication		txt	-76-						
	formtrap:stateme		DS							
Date: 30/07/2008 🔽										
Time: 3:43:27 PM 🐣										

Searching and Filtering panel

View Replication Records

Select the **Replication** button under **Archive** from the top navigation bar. The Formatting view's **detail panels** have the **replication structure** and **delivery status panels** at the bottom which provide additional information. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows each of the formatting process for each job:

- Date / Time of submission
- Queue the queue the data was processed in
- To the recipient of the completed document
- Type the replication type. There are two types: Root and Child.
 - **Root** a topmost queue that has no parents.
 - **Child** a queue that has parent-queue(s) and may have child-queue(s).

In the **replication structure panel**, view the tree structure below the selected queue (if any).

In the **delivery status panel**, FTSpooler shows:

- Status job status
- To queues to which the document is replicated
- Error Description errors in the replication process

Мо	re inform	ation on Expo	rting Fil	es see po	ige 56.		
💱 Queues 🛛 📁 Da	ta folders	Archive	- X	Setup			
🖡 All 🛷 Delivered 🛛 🕸 E	rrors 🔒	Data 🍕 Replic	ation 🔍	Formatt	ing 🚩 Wor	king	
🗙 Clear All – 🌩 Apply filter	Page 🖡	► ← <u>1</u> →	🌵 Refre	sh 🗙 Di	elete		
Queue:	Queue	То		Date	Time	Туре	
(4000)	Statement	Statement File	30)/07/2008	4:44:58 PM	🔦 Child	
	Local	Statement	30)/07/2008	4:44:57 PM	Root	
To:	Statement	Statement Print	30)/07/2008	4:44:54 PM	🔦 Child	
~	Local	Statement	30)/07/2008	4:44:54 PM	🔩 Root	
	Statement	Statement File	30)/07/2008	4:37:18 PM	🔦 Child	
Date range	Local	Statement	30)/07/2008	4:37:17 PM	Root	
From:	Local	Statement	30)/07/2008	4:21:37 PM	Root	
Date: 1/05/2008 🔽	Statement	Statement Email	30)/07/2008	4:15:38 PM	♣Child	
Time: 3:43:27 PM	<						
Time: 3:43:27 PM 🛬	😑 Local		Status		То	Description	
To:		atement	Success	. 🤇	Statement		
Date: 30/07/2008 🗸		Statement File					
Time: 3:43:27 PM 🔶							
			<				

Searching and Filtering panel

View Formatting Records

Select the **Formatting** button under **Archive** from the top navigation bar. The Formatting view's **detail panels** has the **document processing** and **delivery status panels** at the bottom which provide additional information. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows each of the formatting process for each job:

- Date / Time of submission
- Queue the queue the data was processed in
- **Process Name** shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":". For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.

In the document processing panel, you can see delivery history of each document.

In the **delivery status panel**, FTSpooler shows:

- Status job status
- To form(s) used in the processing the document
- Error Description errors in the formatting process

More information on Exporting Files see page 56.

🗙 Clear All 🛛 🌣 Apply filter	Errors 🖶 Data প			View	
	Date	Time	Queue	Process name	Document type
Queue:	30/07/2008	4:52:32 PM	Local	split:Statement	txt
*	30/07/2008	4:51:31 PM	Statement File	Restart	txt
rocess:	30/07/2008	4:51:31 PM	Statement File	formtrap:statement	ps
~	30/07/2008	4:51:31 PM	Statement File	directory:PS2PDF	pdf
Document type:	30/07/2008	4:49:19 PM	Statement Print	Replication	txt
	30/07/2008	4:49:19 PM	Statement Print	formtrap:statement	ps
*	30/07/2008	4:49:18 PM	Statement	Replication	txt
Date range	30/07/2008	4:49:18 PM	Statement	split:Statement_Print	txt
From:	30/07/2008	4:49:16 PM	Local	User Interface	txt
Date: 1/05/2008 💌	😑 Statement Print	Status	То	Description	<u>ו</u>
Time: 3:43:27 PM	Replication	Succe			
viii v	formtrap:st				
To:					
Date: 30/07/2008 🗸					
Time:					
Time: 3:43:27 PM					
		<			

Searching and Filtering panel

View Working Records

Select the **Working** button under **Archive** from the top navigation bar. This view does not have the **searching and filtering panel**.

This view is used for problem diagnosis, specifically "stuck" jobs as most jobs are transient and disappear very quickly.

In the **main panel**, FTSpooler shows the following for each job:

- Status job status
- Date / Time of submission

- **Queue** the queue the data was processed in
- To form(s) used in the processing the document

Between submission and delivery of the formatted document may be several steps such as input filtering, identification and routing an/or splitting, repagination and print formatting. Each step is shown in the **detail panel** located at the right side effectively showing the history of each job in most recent (top) to oldest (bottom) order.

You can select multiple records and save their documents. You can view a document in the appropriate viewer.

- **Process Name** shows the name of the process used to modify or format the document. Some processes show additional information after a colon sign ":". For instance, the print-formatting process "formtrap" is followed with the name of the form; delivery engine "smtp", is followed with the document filter name.
- **Document Type** the file type that is produced by the process. "txt" is raw data, "pcl" or "pclxl" or "ps" are formatted and print ready documents.

More information on Exporting Files see page 56.

Queues 📔 Data folders	Archive	🛞 Setup			
🗊 All 🤣 Delivered 🔞 Errors ا 🔒 De	ata 🛭 🔧 Replica	tion 🔍 Format	ting 🚩 Working		
Page 🍋 🗮 🚺 🔿 🕸 Refresh				🔚 Save ┥ View	N
State To	Date	Time	Queue	Process name	Document typ
Formatting Not applicable	31/07/2008	3:39:36 PM	Statement Email	Replication	txt
				formtrap:statement	ps
				smtp:PS2PDF	pdf

View Logs

Select the **Logs** button under **Archive** from the top navigation bar. In the **searching and filtering panel**, specify searching criteria to retrieve data records.

More information on Search and Filter Archive Records see page 57.

In the **main panel**, FTSpooler shows the general dialog, but not information about a particular job. It provides additional information for troubleshooting processes.

A full description of the selected activity is shown in the **detail panel** located at the bottom of the window.

Connection	es 📔 Data folders 🥃	Archive Setup	
🗊 All 🧭 Delivered 🔞 Errors	🖶 Data 🛭 🔩 Replication 🛛 🍣 Fo	ormatting 🕨 Working 🔢 Logs	
🗙 Clear All 🛛 🌣 Apply filter	Page 🖛 🗮 🚺 🔿 🔹 R	tefresh 🗙 Delete	
	Date Time	Description	
Date range	17/09/2008 6:48:30 AM	Old jobs deleted from archive.	
Erom:	17/09/2008 2:48:29 AM	Old jobs deleted from archive.	
Date: 9/09/2008	16/09/2008 10:48:24 PM	Old jobs deleted from archive.	
Time: 11:18:10 AM	16/09/2008 6:48:24 PM	Old jobs deleted from archive.	
Time: 11:18:10 AM	16/09/2008 2:44:17 PM	Old jobs deleted from archive.	
	16/09/2008 10:40:53 AM	Service started, home: [C:\fthome\v7\]	
Date: 16/09/2008 🗸	16/09/2008 10:40:53 AM	Cannot execute startup process: [path], code	
Time: 11:18:10 AM			
	Service started, home: [C:\ftho	me\v7\]	

Searching and Filtering panel

Managing Records

View the Archive Record

FTSpooler shows 1,000 records per page. When number of retrieved records exceeds page size use these navigation buttons to move between pages:

- Image (the most recent jobs)
- 🗢 previous page

• 📥 - next page

Records are NOT refreshed automatically by FTSpooler.

Delete an Archive Records

To delete a record and its associated files:

- Select the record to be deleted.
- Right click the mouse and select **Delete selected job** option, or click the **Delete**

button \times on the toolbar and choose the desired option. Four options are provided to delete:

- **Selected recipients** delete the information about recipients of the selected records. The files and associated data will remain in the archive.
- All recipients in the query delete the information about recipients in the query. The files and associated data will remain in the archive. The result of this operation is the same as selecting all records on all pages and "Delete Selected recipients".
- Selected jobs all information for the job is deleted.
- All jobs in the query all information for all jobs in the query is deleted. The result of this operation is the same as selecting all records on all pages and "Delete Selected jobs".
- Click the **Yes** button to confirm.

Resubmit a Job

To resubmit a successful or failed job:

- Select the record to be restarted.
- Right click the mouse and select the **Restart** option, or click the **Restart** button
 O on the toolbar.

Exporting

This option is often used to capture data files for testing or for troubleshooting purposes.

To capture a sample data file:

- To view the document, select a "ps" or "pclxl" or "pcl" file (i.e. formatted document).
 - To view the document, double click on the process name, or select the process name and click the **4** icon.
- Select the input txt file.
- To save the document, select the process name and click the \blacksquare icon.
- Click the ... button to browse a **Destination folder** where the file should be saved.

- Select an option from the **File naming** dropdown menu. There are five options available:
 - **ID** name the exporting file using record ID, e.g. 32.txt.
 - **ID-process** name the exporting file using record ID and process name, e.g. 32-split_Statement_Print.txt
 - **ID-queue** name the exporting file using both record ID and name, e.g. 32-Statement.txt
 - **queue-ID** name the exporting file using queue name and ID, e.g. Statement-32.txt.
- Click the **OK** button.

2 🛛
Settings\username\Desktop
×
OK Cancel

Apply Selection to Searching and Filtering Panel

This option short cuts the searching and filtering process. To apply the current selection to the searching and filtering panel:

- Right click on the selected record. the option **Apply to search toolbar** appears.
- Choose one from the available selections list. The criteria in the searching and filtering panel are updated.

Refresh Records

At any time you may click the **Refresh** button 🆸 to update the records displayed in archive.

Records are NOT refreshed automatically by FTSpooler.

Finding and Filtering Archive Records

FTSpooler has a fully searchable database. The **finding and filtering archive records** feature is on the left hand side of the archive window. Search results replace the contents of the archive window, with the **Clear All** button returning to the full archive.

Finding and Filtering Records in the Record View

This feature allows finding records that match the settings chosen in the search box.

• Click the Archive button on the top menu bar, and click the All button.

itatus:		
Do not f	ilter	1
)ueue:		
o:		
		6
20020000	02000	
Date ra	ange	
Date ra		
		~
Fro	m:	×
✓ Fro Date:	m: 25/03/2008	×
Fro Date: Time:	m: 25/03/2008	~

- Select the required Status from **Success**, **Error** or leave as **Do not filter** to see both successful and failed jobs.
- Select a queue and/or recipient name from the **Queue** and **To** drop down menu, or type required values in these fields.

Both fields are case sensitive and can be part completed. For instance, key *inv* in the **Queue** text field to see *invoice-email* and *invoice-print*, but not *Invoice-Email*.

• **Date range** is the time frame of the search and can substantially improve performance by being a narrow selection of dates. By default, the **Date range** is the **default time frame** specified in **Settings Setup**. Changes to the **default time frame** affect the initial state of all queries.

More information on Changing Default Time Frame see page 68.

- Click the **Apply filter** button to match records to the selection criteria. The **Apply filter** first **Refreshes** the main archive panel so all records are searched.
- Click the Clear All button to set selection criteria back to the default values.

Job Status is not needed if you are in either Delivered or Errors View.

Finding and Filtering Records in the Data View

This option finds data that matches the settings in the search box.

• Click the **Archive** button on the top menu bar, and click the **Data** button.

lame:		-
mtpto		
alue:		
ueue:		
		1
Date ra	1. The second	
Date ra Pro Date:	1. The second	
Ero	m:	~
⊡ Ero Date:	m: 25/03/2008	*
Date:	m: 25/03/2008	~

• Select an associated file name, value, and/or queue name from the **Name**, **Value**, and **Queue** drop down menus, or type required values in these fields.

These three fields are case sensitive and can be part completed. For instance, key *inv* in the **Queue** text field to see *invoice-email* and *invoice-print*, but not *Invoice-Email*.

• **Date range** is the time frame of the search and can substantially improve performance by being a narrow selection of dates. By default, the **Date range** is the **default time frame** specified in **Settings Setup**. Changes to the **default time frame** affect the initial state of all queries.

More information on Changing Default Time Frame see page 68.

- Click the **Apply filter** button to match records to the selection criteria. The **Apply filter** first **Refreshes** the main archive panel so all records are searched.
- Click the Clear All button to set selection criteria back to the default values.

Finding and Filtering Records in the Replication View

This option finds replications that match the settings in the search box.

• Click the Archive button on the top menu bar, and click the **Replication** button.

ueue:		
o;		
Date ra	ande	
Date ra		
Ero		~
Date:	m:	~
Date:	m: 25/03/2008	~

• Select a queue and/or recipient name from the **Queue** and **To** drop down menu, or type required values in these fields.

Both fields are case sensitive and can be part completed. For instance, key *inv* in the **Queue** text field to see *invoice-email* and *invoice-print*, but not *Invoice-Email*.

• **Date range** is the time frame of the search and can substantially improve performance by being a narrow selection of dates. By default, the **Date range** is the **default time frame** specified in **Settings Setup**. Changes to the **default time frame** affect the initial state of all queries.

More information on Changing Default Time Frame see page 68.

- Click the **Apply filter** button to match records to the selection criteria. The **Apply filter** first **Refreshes** the main archive panel so all records are searched.
- Click the Clear All button to set selection criteria back to the default values.

Finding and Filtering Records in the Formatting View

This option finds records that match the settings in the search box.

• Click the Archive button on the top menu bar, and click the Formatting button.

Queue:	111 - 1 I	6
I CG MOI	nthly Statement	~
Process:		-
directory	y:PS2PDF	*
Documer	nt type:	
		~
		Line
Date ra	ande	
Date ra		
		~
Ero	m:	*
⊡Ero Date:	m: 25/03/2008	× •
☑ Fro Date: Time:	m: 25/03/2008	 • • •

• Select a name from the **Queue** and **Process** and/or **Document type** drop down menu, or type required values in these fields.

These three fields are case sensitive and can be part completed. For instance, key *inv* in the **Queue** text field to see *invoice-email* and *invoice-print*, but not *Invoice-Email*.

• **Date range** is the time frame of the search and can substantially improve performance by being a narrow selection of dates. By default, the **Date range** is the **default time frame** specified in **Settings Setup**. Changes to the **default time frame** affect the initial state of all queries.

More information on Changing Default Time Frame see page 68.

- Click the **Apply filter** button to match records to the selection criteria. The **Apply filter** first **Refreshes** the main archive panel so all records are searched.
- Click the Clear All button to set selection criteria back to the default values.

Error Messages from FormTrap Spooler

FTSpooler keeps all the job processing and delivery information in one job archivem and provides different views, i.e. All, Delivered, Errors, Data, Replication, Formatting, Working and Logs.

Archive shows three panels: searching and filtering, main panel and detail panel.

More information on Archive Database see page 66.

Self Explanatory Errors

Most errors from the Spooler itself are self explanatory, for example, this one, in the left-hand panel of Archive, Errors.

Input type mismatch: expected input file type is [PCLXL], actual input type is [TXT] Process (PCLXL to any printer), path(pclxlprn.exe) - file does not exist. :

Program is saying it EXPECTS a PCLXL file,	expected input file type is [PCLXL]
but no PCLXL file can be found,	actual input type is [TXT]
hence the process must be	Process (PCLXL to any printer),
wrong.	path (pclxlprn.exe)

Check by looking at the **Archive**, **All** display of **files** at the right, if this shows (for example) **.pcl** or **.ps** files, you are using the wrong filter program in this queue.

Printer Errors, E0xxxxxx

FormTrap Server ignores the highlighted errors from the list below. If you want additional Printer Errors ignored in your site, please notify Support@FormTrap.com.

PRINTER_STATUS_PAUSED	0x0000001
PRINTER_STATUS_ERROR	0x0000002
PRINTER_STATUS_PENDING_DELETION	0x00000004
PRINTER_STATUS_PAPER_JAM	0x00000008
PRINTER_STATUS_PAPER_OUT	0x00000010
PRINTER_STATUS_MANUAL_FEED	0x00000020
PRINTER_STATUS_PAPER_PROBLEM	0x00000040
PRINTER_STATUS_OFFLINE	0x00000080
PRINTER_STATUS_IO_ACTIVE	0x00000100
PRINTER_STATUS_BUSY	0x00000200
PRINTER_STATUS_PRINTING	0x00000400
PRINTER_STATUS_OUTPUT_BIN_FULL	0x00000800
PRINTER_STATUS_NOT_AVAILABLE	0x00001000
PRINTER_STATUS_WAITING	0x00002000
PRINTER_STATUS_PROCESSING	0x00004000
PRINTER_STATUS_INITIALIZING	0x00008000
PRINTER_STATUS_WARMING_UP	0x00010000
PRINTER_STATUS_TONER_LOW	0x00020000
PRINTER_STATUS_NO_TONER	0x00040000
PRINTER_STATUS_PAGE_PUNT	0x00080000
PRINTER_STATUS_USER_INTERVENTION	0x00100000
PRINTER_STATUS_OUT_OF_MEMORY	0x00200000
PRINTER_STATUS_DOOR_OPEN	0x00400000
PRINTER_STATUS_SERVER_UNKNOWN	0x00800000
PRINTER_STATUS_POWER_SAVE	0x01000000
PRINTER_STATUS_SERVER_OFFLINE	0x02000000
PRINTER_STATUS_DRIVER_UPDATE_NEEDED	0x04000000

Vague or Meaningless Errors

If error is vague or even meaningless, then it is likely coming from Windows. Please next look in the FormTrap Knowledge Base (within www.formtrap.com), by entering keyword searches with key words from the error message. For example, using "**error code**" as the keyword will return common printer statii reported by Windows and what you can do about them.

If You are Still Stuck

Please email FormTrap Support (Support@FormTrap.com) with these documents and files:

1. Screen shot of the error taken from **Archive**, **Errors** with the item causing the problem highlighted, we're interested in the **bottom two panels** on the screen which is the best (sometimes only) information available.

Connection 🛞 Quer	· · · ·		tup ng 🕼 Logs			0
X Clear Al \$ Apply fiter Queue:		Refresh X Delete C Recipient type		Tim	Queue	
preve.	0	void	3/31/2010	2:27:46	Invoice 3 - Custo	
M	•	void	3/31/2010	2:27:46 PM	Impice 3 - Pack Sip	
		void	3/31/2010	2:27:45 PM	Arrival Queue	
*		void	3/31/2010	2:27:45 PM	Arrival Queue	
			in the strength of	2:27:45 PM	and the second sec	
		void	3/31/2010	212/140 699	A val Queue	

2. Screen shot of **Archive**, **All** showing the **file list** at the right.

🍲 Connection 🕸 Queues 🥠 Data folders 👔 Archive 🕺 Setup								
All 🥝 Delivered 😵 Errors	🏪 Data 🤸	Replication	🔍 Formatting	🥊 Working 🔞 Logs		-	-	-
Clear Al 🌾 Apply fiter	Page 😽	• 1 •	S Refresh 🗙	Delete 🖸 Restart		7	🖬 Save 👍 Vi	ex
atus:	Status	Dete	Time	Queue	То	1	Process name	Document type
	Success	3/31/2010	2:27:46 PM	Invoice 3 - Accounts	VPLATO HP Color LaserJet 4600 P5		Replication	bit
o not filter 🛛 💌	Error	3/31/2010	2:27:46 PM	Invoice 3 - Customer	•		formtrapsiny 3oust	pd
eue:	Di France	3/31/2010	2:27:46 PM	Invoice 3 - Pack Sig				

- 3. Saved formatted document (suffix .pcl, .ps or .pclxl) from the above (use this to save the document to a folder).
- 4. First document and (if this exists) the last **.txt** document from the above.

Save 🖌 View		
Process name	Docume	it type
User interface	txt	
dbprodo	txt	
split:Deutsche	txt	
formtrap:bothnotes	ps	
smtp:PostScript to PDF	pdf	

- 5. From (.frm) file from the FTDesign environment (bothnotes.frm), WITH any repagination file (.rpg) used by the form.
- 6. Zip all of the files and include with your email. If you have HTML format email, you can drop the screen shots in directly.
- 7. Please send the file from Archive, Log.
- 8. If the error is in a Windows System component (SMTP, W2KFax), please look at the Event Viewer and if there are entries that look relevant, please zip and send that

as well.

The above should allow us to respond efficiently to you.

Not a current customer:

If you are not a supported customer (current on Support and Upgrades), we will call you on the next business day to request credit card payment. That may be an email if you are not in the same time zone.

Core Components

FTSpooler **Core components** shows the versions and locations of all the FTSpooler essentials. Locations of forms, substitution files and rule files can be changed under **Home folder**.

Home Directory (%fthome%): is shown for information. It cannot be changed on this screen, but can be changed by first stopping the FormTrap Spooler then using program **FTHome Locator** (access via **Start > Programs >FormTrap > Server V7**).

Note: If changes to queues disappear when you stop the FormTrap Spooler, please see:

Install directory (%ftinst%): is shown for information, it is the location of your FormTrap executable files and cannot be changed.

In Formatting section, specify Location of forms and substitution files, normally %fthome%\data.

In **Identification and split** section, specify the **Location of rule files**, normally **%fthome%****rules**.

Core components	Home directory (%fthome%):
🗾 Archive 🗹 Settings	C:\fthome\v7\
Tilters	Install directory (%ftinst%):
🖅 Run	C:\Program Files\TCGIS\FTSpoolerV7\
Data Input File System LP (Line Printer) Named pipes Delivery	Eormatting Version: 6, 5, 3, 0 Location of forms and substitution files: %fthome%\data
 Print servers Printer licensing E-mail Applications 	Identification and split Version: 2, 0, 7, 0 Location of rule files:
	%fthome%\rules
	Page normalisation (repagination) Version: 2, 1, 0, 4
	Save Restore

Archive

Archive manages the database server and archive location, monitors the local database service status, and performs maintenance.

Logging is to a **FireBird** data base (also 32 or 64 bit). The DB need not be on the same machine or operating system.

FTSpooler has one FireBird database for all the job processing and delivery information. Location is stated in **Database server and archive location**. **Recovery** is built-in by logging of the data for each task before release to the external process. The database deletes no longer required transactions several times per day, and you should schedule Backup and Recovery as the database gets too large. Backup and Recovery removes deleted space from the database, returning it to the system as free space.

- **Note:** Setup of the archive on another machine is not a part of these instructions. Please contact support@formtrap.com for details and a quotation if you would like your system set up this way.
 - Select the **Server location (IP address)** from the dropdown menu. "localhost" means the database is located on the local machine.
 - Enter the **Folder** name, and make sure to use drivers that are local to "localhost" server.

Start or **Stop** the **Local database service** and check status. Jobs in Archive View will only display if the Service status is **Ok**.

Note: It is not recommended to stop the Local database service as FTSpooler stops operating. The only case would be to obtain a "cold" backup of the database.

💦 Core components	Database server and archive location
🧾 Archive	
🖉 Settings	Server location (IP address):
🍸 Filters	The database is considered to be local if the server's IP address is "localhost"
团 Run	Folder (use drives that are local to the "localhost" server):
Data Input	%fthome%
🚆 🛛 File System	
👳 LP (Line Printer)	Save Restore
Named pipes	
Delivery	Local database service
Print servers	Start Stop
Printer licensing	Service status: Ok
E-mail	Maintenance
Applications	
	<u>Create file</u> <u>D</u> elete file
	File size: 24 M
	Backup
	Progress:
	4 <u>6</u>

The current **File size** can be found in the Maintenance section.

The FireBird DB operates as "high watermark" meaning the file size never shrinks, instead deleted space is re-used. The DB auto-expands until the point where deletions roughly equate to additions, at which time it stabilizes. That is typically around the 10 GB mark and depends on the retention period "**Number of days to keep records**" in **Queues**, **General** tab. A zero value in **Number of days** … means indefinite retention, hence a large and growing DB. Deletion of obsolete records happens several times per day and is automated by the Spooler.

You may place the DB on a different drive, this is recommended if your DB is large and infrequently backed up and restored.

Managing your DB

These tools are available to control your FireBird DB.

Save and **Restore** save an exact copy of the DB and can be used for restoring in the event of a DB outage. **Backup...** and **Restore...** are preferred.

Backup... and **Restore...** are used to bring the DB back to minimum size. FireBird does not recover deleted space (but does reuse deleted space, so while the DB may not shrink, it has room for additions). Backup/Restore recovers deleted space. **Stop** archiving prior to Backup/Restore and **Start** archive when completed.

Delete file... and **Create file...** allow deletion of the entire current DB and replacement with an empty DB. **Stop** prior and **Start** when complete. You should wait around 30 seconds after **Delete file...** before pressing the **Create file...** command.

Settings

FTSpooler Settings allows changes to process control, logging information saved, and user interface presented.

You need to restart FTSpooler for this to take effect.

Maximum number of processing threads regulates the number of jobs being processing simultaneously. **External process timeout (seconds)** provides a timeout for external processes. FTSpooler registers an error if control is not returned to it within the specified timeout.

Logging is particularly helpful in determining problems and troubleshooting. Select one of the **Log level** views:

- No logging Do not keep the log records when running FTSpooler
- Normal Keep basic log records when running FTSpooler
- Verbose Keep detailed log records when running FTSpooler

Click on the **View** button to see the debug log file.

To configure FTSpooler's User Interface:

- Choose the windows start up status to be either **Normal**, **Normal with an icon on the taskbar**, or **Hidden with an icon on the taskbar**.
- When updating queue properties, FTSpooler can **Save changes** in the following ways:
 - **Prompt** reminder pops up to ask for whether or not to save the changes.
 - Save automatically changes are saved automatically without any prompts.
 - **Do not save automatically** changes are not saved unless the **Apply** button is pressed in each properties tab.
- The field **Initially in the archive show records that are no older than a certain number of days** monitors the **default time frame** for the Archive when starts up. This number affects the initial state of all the queries to the Archive.

& Core components Archive Settings Filters		of processing threads:	8	
Image: System Image: System <td< td=""><td>Logging Log level: Nor</td><td>mal 💌 (</td><td><u>V</u>jew</td><td></td></td<>	Logging Log level: Nor	mal 💌 (<u>V</u> jew	
Delivery Print servers Printer licensing E-mail Applications	User interface <u>W</u> indow startup: Save changes: Initially in the arch than a certain num 7 <u>Save</u>	Normal Prompt nive show records that ar nber of days: Restore	e no older	

More information on Default Time Frame in Archive see page 57.

Filters

This option allows addition or removal of filter(s), and management of the filter's properties such as name, description, path and input/output type. Filters MUST deliver a modified version of the input file back as output, otherwise you will get a Spooler error **Filtering: empty output file produced by process [C:\Program Files\TCGIS\FTLabelPrint\FTLabPrt.exe] with arguments ...**

Note: Do not register FTLabelPrint as a filter, it is an Application.

To add a filter:

- Click the **New** button
- Name the filter and provide a brief Description.
- Enter the **Path** to the filter. **Path** could be in absolute form, or relative to the FTSpooler's **Installation Directory** (%ftinst%) or any other directory specified by the 'PATH' System environment variable. For the purpose of maximum portability it is recommended to place all executables in the %ftinst% directory and specify just the executable name (without path).
- Enter the command line **Arguments**. If you are not using the standard input and output devices (**Use standard input/output** checkbox) the input and output files are specified in the command line using "%1" and "%2" parameters. You are responsible for correctly quoting the command line arguments.

- **Initial directory** is usually left empty. In this case it defaults to the executable's location.
- Choose the **Input type** and **Output type** from the dropdown menu.
- Check other options if applicable:
 - Check status
 - Require output
 - Use standard input/output
 - Hide console (will fail for GUI application)
 - Hide GUI window (will fail for console)
- Click the **Save** button.

To delete a filter:

- Select on the filter to be deleted.
- Click the **Delete** button.
- Confirmation dialog box pops up.
- Click **Yes** to finish.

Core components	Available filters:	Properties of PostScript to PDF
Settings	Arabic AS400filter Cate Statement Repaginate as F CateEquipment Chinese Simplified (936)	Name: PostScript to PDF Description:
 Run Users Data input File system LP (Line printer) Named pipes Delivery Print servers Printer licensing E-mail Applications Monitor 	Chinese Simplified (936) Chinese Traditional (950) CR to LF dbprodo Delivery selection Delivery selection v2 Find PROJECT replace with Std S FTLabelPrint Auction Label to Pos HP9040 Bin 2 Normal output MBF Add Trailer as Hdr MBF Repag RemHdrs Payment initial repaginate PCL to TIFF PCLXL to any printer PCLXL to Canon iP100 on Plato PCLXL to PDF PCLXL to TIFF POSIScript to PDF	Converts PostScipt files into PDF. Use for e-mailing. Make sure your forms are designed for PostScript printer driver. Path: ps2.exe Arguments: ps2 -dNOPAUSE -dBATCH -dSAFER -dCompatibilityLevel=1.4 -sDEVICE=pdf. Initial directory:
	PostScript to TIFF Preliminary Cheque Filter Remove Leading Nulls Remove PCL5 escapes Replace data name Replace data name v2 Replace T&B Project TB Estimate Project Thai TIFF rotate Western	Input type: ps Output type: pdf Check status Require output Use standard input/output Hide console (will fail for GUI application) Hide GUI window (will fail for console) Save

Note: The PostScript to PDF filter includes the Compatibility Level required, this is supplied as 1.3 but can be changed to 1.4 as shown.

Run

This option allows addition or removal of process(es) that run simultaneously with FTSpooler, but run independently. These processes are started by FormTrap at the start of FTSpooler. Typical examples are independent delivery services, such as Prodocom Fax Service which is a delivery "agent" on the same computer as the FTSpooler.

To add a process:

- Click the **New** button.
- Name the process and provide a brief Description.
- Enter the **Path** to the process. **Path** could be in absolute form, or relative to the FTSpooler's **Installation Directory** (%ftinst%) or any other directory specified by the 'PATH' System environment variable. For the purpose of maximum portability it is recommended to place all executables in the %ftinst% directory and specify just the executable name (without path).
- Enter the command line **Arguments**. You are responsible for correctly quoting the command line arguments.
- **Initial directory** is usually left empty. In this case it defaults to the executable's location.
- Check other options if applicable:
 - Hide console
 - Hide GUI window
- **Note:** These are mutually exclusive, the application will either be: a Windows program (in which case **Hide console** will cause an error) or a command line program (in which case **Hide GUI** window will cause an error)
 - Click the **Save** button.

To delete a process:

- Select the process to be deleted.
- Click the **Delete** button.
- Confirmation dialog box pops up.

• Click Yes to finish.

Core components	Processes:	Properties of name
Archive Settings Filters	name	Name: name
Run		Description:
Data Input File System LP (Line Printer) Named pipes Delivery Print servers Printer licensing E-mail Applications		description Path: path Arguments: -t -0 Initial directory: Hide console Hide GUI window Save

Data Input

File System

This option allows the user's application or a copy statement to write a file directly to the queue folder.

To configure the file system option:

- Tick the **Enable** at **start-up** checkbox to enable the file system option at FTSpooler start-up.
- You need to Stop and Start as below for this to take effect.
- Alter the location of the Folder being watched if required.
- Click the **Save** button.

Start or Stop and Start the service and check Current state is Ready.

More information on Submit Queue via Network see page 84.

%fthome%\\input	
Save	
<u></u>	
Current state Ready Start Stop	
	Ready

LP (Line Printer)

This option allows FTSpooler to listen for print requests from LPR clients (via the Line Printer Protocol) and to act as the Print Server (LPD). FTSpooler also acts as a print server to requests coming from a Work Station Customisation Object from AS/400 computers.

To configure FTSpooler to act as an LP server:

• Tick the **Enable at start-up** checkbox.

Note: You need to Stop and Start as below for this to take effect.

- Specify the port number to avoid Windows/UNIX conflicts. The port may be changed to support client applications that use non-standard port numbers to send print requests. Usually this option will not be changed with the default port number (515) used by the Print Daemon. Contact Us for more information on this feature.
- Click the **Save** button.

Start or **Stop** and **Start** the (File System/LP/Named Pipes) input service and check **Current state** is **Ready**.

More information on Submit Queue via Line Printer see page 85.

 Core components Archive Settings Filters Run Data Input File System 	Enable at start-up <u>Port:</u> 515 Save
 LP (Line Printer) Named pipes Delivery Print servers Printer licensing E-mail Applications 	Current state Ready Start Stop

Named Pipes

This option allows the user to pipe data from their application to a queue, provided the application is able to directly use a pipe. FTSpooler generates a pipe called \\ServerName\pipe\QueueName (where ServerName is replaced with "." (dot) if writing from an application on the FormTrap server to the queue on the same machine).

To configure the named pipes options:

• Tick the **Enable at start-up** checkbox to enable pipes at FTSpooler start-up.

You need to Stop and Start as below for this to take effect.

- Enter the **Pipe prefix**.
- Press Save.

Start or Stop and Start the service and check Current state is Ready.

Core components Archive Settings Filters Run Users	Server name: Add Print servers used	d to deliver documen	ts:]
Data input	(piato			
File system LP (Line printer) Named pipes				
Delivery				
Print servers				
Printer licensing				
E-mail	1			16
Applications	Remove			
Monitor				

More information on Submit Queue via Named Pipes see page 84.

If you have other applications using pipes, you can prevent conflict by using more of the prefix to uniquely identify FormTrap pipes. In this case, consider a prefix of "\\.\pipe\ft-" to identify FormTrap pipes (ft- can be whatever you require). The final pipe name might be "\\.\pipe\ft-invoices".

Delivery

Print Servers

This option allows the addition of print server(s) available for delivering documents from FTSpooler. Printers installed on selected server(s) are listed. Individual printers may be licensed using **Printer licensing** from the Delivery menu at screen left. Local printers are ALWAYS shown.

More information on Printer Licensing see page 76.

To add a print server:

• Enter the **Server name** and click the **Add to the list** button. The list of **Print servers used to deliver documents** is updated.

To remove a printer server:

- Select one of the print servers and click the **Remove from the list** button.
- Confirmation dialog box pops up.

💦 Core components	
I Archive	Server name:
📶 Settings	
🍸 Filters	Add to the list
💷 Run	Print servers used to deliver documents:
Data Input File System Delivery	\\plato \\micius \\aristotle
🐏 Print servers	
Printer licensing E-mail Applications	Remove from list

• Click **Yes** to finish.

Printer Licensing

FTSpooler is licensed to a given number of printers.

The list of printers is copied from printer servers known to FTSpooler and must include one local or networked laser printer with PCL5 or PCLXL (PCL 6) or PostScript driver. If you have Version 7.1 or above, you may tick and print to other printers/drivers using the "Print to ANY Windows Printer" option from files output as PCLXL using a filter. GUI drivers such as PDF drivers WILL NOT WORK and will time out. GhostScript PDF conversion from PostScript is provided.

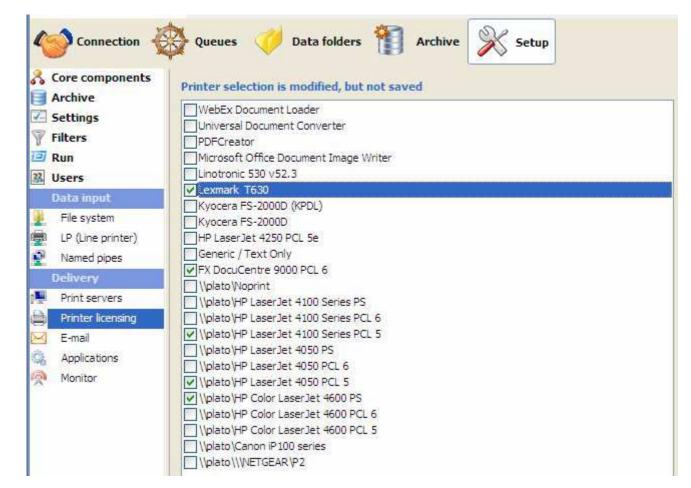
Note: FormTrap produces print-ready files for laser printers and requires just the physical address, hence you may choose just the one driver for a given printer (say the PostScript driver) and print in PCL5 or PCLXL or PostScript to it. Some older/deficient printers may not operate with Unicode, test files are available within the Knowledge Base (keyword "Printer Test"). This DOES NOT apply to the "Print to ANY Windows Printer" option which relies on the driver. Observations on specific printers that fail are available form the KB (keyword "Print").

More information on Print to ANY Windows Printer see page 31.

More information on Print Servers see page 75.

To configure printer licensing:

- Check the printers in the list that you wish FTSpooler to print to, up to the maximum number of licensed printers.
- Click the **Save** button.



Email

FTSpooler offers two e-mailing methods: Simple Mail Transfer Protocol (SMTP) and Microsoft® Outlook/Exchange (MAPI).

To configure the SMTP connection:

- Enter the full domain name of the SMTP server in the **Host** textbox.
- Choose a login type from the **Login** drop down menu.
- For login options other than None, enter the **User** and **Password** to be used by FTSpooler to log into the SMTP server when sending email.
- Choose an encoding type from the **Encoding** drop down menu.
- Enter a full email address in the **Default sender** textbox to define the sender details for outgoing email.
- Click the **Save** button.
- **Note:** Microsoft Exchange Version 7 has differences from earlier versions, you will need to check these items in Exchange 7 and set them when installing or transferring to Exchange 7.

Check and modify these in Exchange 7 (this information is offered as a guide only, consult Microsoft documentation):

- In Authentication Properties tab enable Basic Authentication and disable Offer Basic authentication only after starting TLS. TLS is the default for Exchange 7 and is not supported by FormTrap.
- If you intend using an **SMTPFrom** name that is different from the authenticated user, give permission to **Send As** a different address. For details of how to grant this permission, refer to the following Microsoft article:

http://technet.microsoft.com/en-us/library/aa998291(EXCHG.80).aspx

If you do not do this and set SMTPFrom different from the authenticated user, you will get this error:

550 5.7.1 Client does not have permissions to send as this sender

To use Outlook/Exchange, the profile information must be available to FTSpooler. The profile name is mandatory, password is optional and required only if the profile is password-protected.

To configure Outlook/Exchange settings:

- Select the appropriate email profile from the **Logon Profile** list. No profile listed means there is no MAPI profile configured. Create and configure a profile on that machine before continuing.
- Enter the password for that profile.

• Click the **Save** button.

Core components	SMTP		
Archive	Host:	mail	1
Settings			
Filters	Login:	None	
🛛 Run	User:		
Data input	Password:		
File system LP (Line printer)	Encoding:	None	
Named pipes	Default sender:	accounts@formtrap.com	
Delivery			
Print servers	Outlook / Exchang	je :	
Printer licensing	Logon Profile:	~	~
🗹 E-mail	Password:		-
Applications	r assivor at		

Application

Applications are delivery points for the FTSpooler. An application is a one-off procedure that is started each time the FTSpooler delivers to it, and stops on completion. Most applications are concerned with Fax delivery. As an example, the Prodocom Application runs each time a fax needs to be delivered to Prodocom, delivers to the Prodocom Run task which is available from the time the FTSpooler starts until it stops. The Prodocom Run task does the actual delivery to Prodocom's computers via a private and secure protocol, asynchronously.

To add an application:

- Click the **New** button.
- Name the application and provide a brief Description.
- Enter the **Path** to the application. **Path** can be absolute or relative to the FTSpooler's **Installation Directory** (%ftinst%) or any other directory specified by the 'PATH' System environment variable. For maximum portability we recommend placing executables in the %ftinst% directory and specify just the executable name (without a path).
- Enter the command line **Arguments**. If you are not using the standard input and output devices (**Use standard input/output** checkbox) the input and output files are specified in the command line using "%1" and (optional) "%2" parameters. %1 is the print file, with extension .pcl or .pclxl (PCL6) or .ps (Post-

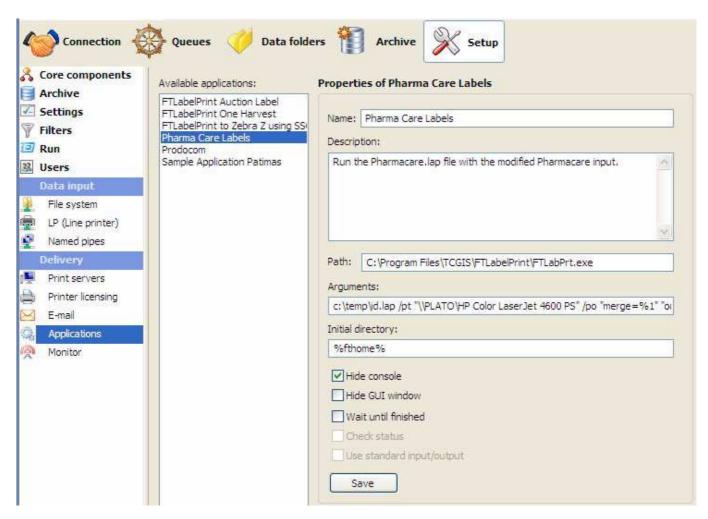
Script). This name given in %1 can be used by your application to also open the Associated File by substitution of .af as the extension.

You may specify other parameters on the command line using the [assoc file name] format. For example, if you have an Associated File entry Netfax=123 456 7890 and the application has a parameter –fNetFaxNumber, you can send it in this format as part of the Argument line: "-f[Netfax]" (where the quotes are required as the data contains spaces). This delivers "-f123 456 7890" to the application. Arguments are normal where individual delivery is required with fax applications being the most common. It is your responsibility to test applications and especially variations in recipient data.

- **Initial directory** is usually left empty. In this case it defaults to the executable's location.
- Check other options if applicable:
 - Hide console
 - Hide GUI window
 - Wait until finished
 - Check status
 - Use standard input/output
- Click the **Save** button.

To remove an application:

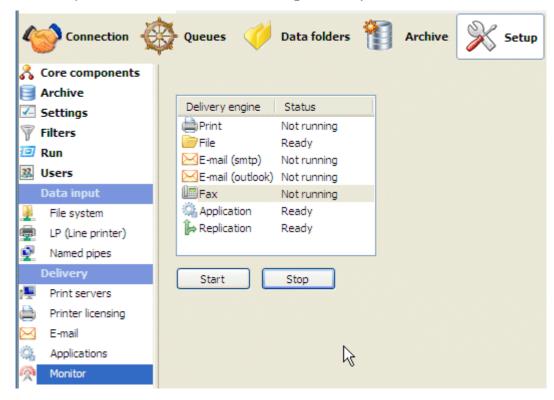
- Select on the application to be deleted.
- Click the **Delete** button.
- Confirmation dialog box pops up.
- Click Yes to finish.



More information on Queue Properties - Applications see page 31.

Delivery Monitor

The Delivery Monitor enables you to view which delivery engines are currently running in the Spooler. It also enables you to disable one or more of the delivery engines. Reasons you might want to do this include errors in the release of files to FormTrap, or a failing device within your system, such as Email. This applies particularly where individual documents are delivered individually. Once a process (such as Printing) is turned off, the scheduled jobs can be managed from the Archive and either deleted or moved.



The Delivery Monitor can be accessed from **Setup**, **Delivery**, **Monitor**.

To disable a Delivery engine:

- Select the Delivery engine(s) you want to disable.
- Click the Stop button.

To enable a Delivery engine:

- Select the Delivery engine(s) you want to enable:
- Click Start

Submit

Submit Input Data for Job Processing

Once queues are created, you may produce and deliver FormTrap documents by submitting data to the queue input folder or named pipe or by printing to the line printer (TCP/IP printer). In addition you can drag and drop files with "*.txt" and "*.dat" extension to the FTSpooler main Window, and drop directly into the required queue.

Activity Monitor

Activity Monitor shows the real-time job processing and delivery information, in brief, on the pop-up right hand side panel.

To minimize the monitor panel, click on the \bigcirc button.

🞯 FTSpooler - Small	Business Edition		_ 0
		Queues (17)	Activity Monitor
FormTra			□ · ፼ Statement Email (11:38:3)
		Licensed to: Me, 77 printers	
🗛 Oueues 🌈	🕇 Data folders 🛛 🖂 /	Archive 💥 Setup 🛛 📿	
			smtp
🞒 Print 🔛 E-mail	🖸 Identification 🗋 Blank	🕞 Clone 🛛 🗙 Delete 🥕 Tools 🌣 Refresh	exit
			😑 🌍 Delivery
Queue	Function	Email Fax File Applications General Processing Filters Print	🖉 smtp
🖉 Invoice Email	PostScript forms: taxinvc	General Processing Filters Print	🚊 🕸 Statement (11:38:31)
Invoice Print	PostScript forms: taxinvc	Queue name: Local	
1 Invoice	QUEUES: Invoice Email; 1	Data Input	
Second Second	RESOLVE VIA: ftstdsplit	Input services:	🖓 replicate
Purchase Order Email	PostScript forms: purcha		exit
Purchase Order Print	PostScript forms: purcha	V Line printer (LP) Security	😑 🌏 Delivery
Purchase Order	QUEUES: Purchase Orde	Vamed pipe Options	🧹 🧭 replicate
Statement Email	PostScript forms: statem		😑 🚳 Local (11:38:30)
Statement Print	PostScript forms: statem		⇒ start
Statement 📀	RESOLVE VIA: stmt	Notify	-)= splitter
Remittance Advice	🕸 QUEUES: Remittance Ad	Notification Type:	🚳 replicate
🧭 Remittance Advice File	PostScript forms: remitta	Do not notify	exit
🧭 Statement File	PostScript forms: statem	E-mail address (name@domain):	😑 🍣 Delivery
🧭 Simple Print Queue	FORMS: formtrap		🦾 🏈 replicate
🧭 Simple Email Queue	PostScript forms: formtra		General Statement Print (11:38:2)
🕜 Failure		Archive	
Simple Identification	. 📇 RESOLVE VIA: stmt	Number of days to keep records:	formtrap
🔍 ps template			exit
a, pcl template		0	🖃 🌍 Delivery
			print
		Apply Restore Help	Statement (11:38:23)
<	>	Apply <u>R</u> estore <u>H</u> elp	
p			

FTSpooler - Small Business Edition **Activity Monitor** Ð Queues (17) Error recorded (11:53:01 AM orm Click to see more informati Licensed to: Me, 77 printers 🛞 Statement Email (11:52:49) Setup Data folders Archive 🔿 start Oueues 🐴 formtrap Drocess 🞒 Print 🔛 E-mail 🖸 Identification 🗋 Blank 🕞 Clone > Tools... X Delete... 🍄 Refre 🖂 smtp Function Queue Email File Applications Fax 💝 exit 🧭 Invoice Email PostScript forms: taxinvo General Filters Processing Print 🖃 🌏 Delivery 🧭 Invoice Print PostScript forms: taxinvc 🐠 smtp Queue name: Local 🌝 Invoice 🔆 QUEUES: Invoice Email; I 😑 🙆 Statement (11:52:48) Data Input 🖉 Local RESOLVE VIA: ftstdsplit 🔿 start Input services: 📇 splitter 🧭 Purchase Order Email PostScript forms: purcha Line printer (LP) Security ... 🛞 replicate Purchase Order Print PostScript forms: purcha 🔽 File system 🧭 Purchase Order 🙆 QUEUES: Purchase Orde 🚧 exit Named pipe Options... Delivery 🧭 Statement Email PostScript forms: statem 🧭 replicate 🧭 Statement Print PostScript forms: statem 😑 🙆 Statement Email (11:38:31) Notify RESOLVE VIA: stmt 🕑 Statement Notification Type: 🤿 start 🙆 QUEUES: Remittance Ad 🕜 Remittance Advice A formtrap Do not notify ~ 🧭 Remittance Advice File 🔛 PostScript forms: remitta C process PostScript forms: statem 🧭 Statement File E-mail address (name@domain): Smtp. FORMS: formtrap 🧭 Simple Print Queue 🚧 exit 🐼 Simple Email Queue PostScript forms: formtra 🍓 Delivery 🧭 Failure Archive 🕜 smtp Simple Identification ... 📇 RESOLVE VIA: stmt Statement (11:38:31) Number of days to keep records: É ps template 🤿 start a_pd template - colitter

A red light flashes indicating an error has occurred. Click to go to the Errors view of Archive for troubleshooting.

Submit Queue via Network

Once the queue folders are shared on the network, you can process data with FTSpooler by copying or writing the data file to the appropriate folder. FTSpooler automatically detects the arrival of a new file in the queue and processes it.

More information on Configuring Data Input of the Queue see page 10.

More information on File System Setup see page 72.

If you give access via FTP to the queue folder, FTSpooler can then act as a remote document gateway and take advantage of the system's delivery facilities over the Internet.

Submit Queue via Named Pipe

This option allows the user to write directly to FTSpooler using a pipe in place of a file, either directly from a suitable application program or by using command line Copy statement. A "suitable" application program will generally be a command line application, writing to "standard output device".

FTSpooler generates the pipe \\.\pipe\Queue_Name for users to send the data into. "." (dot) in the pipe refers to the current machine (on which FTSpooler is running).

For example, with FTSpooler installed on machine B with "pipe" in force to queue name "Sample_Queue", FormTrap generates this pipe: \\.\pipe\Sample_Queue.

To write to this pipe from Machine A, this is the pipe statement: **MachineBName\pipe\Sample_Queue**.

More information on Configuring Data Input of the Queue see page 10.

More information on Named Pipe Setup see page 74.

Submit Queue via LPR Printer

FTSpooler supports the Line Printer (LP) protocol by acting as an LP Daemon (LPD). FTSpooler acts like a printer. The LP protocol is a special way of printing data across a TCP/IP network and is most commonly found on UNIX systems, although it is supported by all major network operating systems, including AS/400.

The LP protocol enables you to print a document located on one machine to a printer attached to another machine on the network (a network printer).

More information on Configuring Data Input of the Queue see page 10.

More information on Line Printer Setup see page 73.

Printing from Windows Applications

In Windows-based systems create an LPR printer port for Windows applications to be able to "print" jobs to an LP Server. These printers act as redirection tools so that applications can print to the FTSpooler queues. It will help to think of them as "Virtual" printers as they have no direct connection to a physical printer.

Before creating your LPR printers it is necessary to create the corresponding queues in FTSpooler. The name(s) of the FTSpooler queue(s) will be used when creating the LPR port.

More information on Creating a FTSpooler Queue see page 4.

For Windows XP:

Ensure the following prerequisites are in place before you get started:

- You have the administrator rights.
- LPR Port is installed.

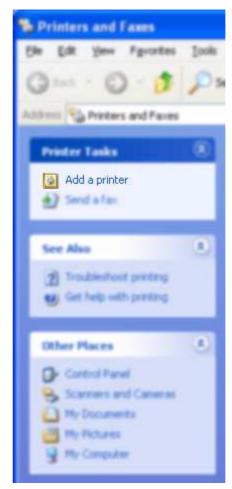
More information on How to Step Up an LPR Port on your PC.

• FTSpooler Version 5 or above is installed.

Configuration steps:

• Select **Printer and Fax** from the **Start** menu.

• Click on **Add a Printer** in the left bar.



• Click **Next** and choose **Local Printer** in the **Add Printer Wizard**. Do ensure the **Automatically detect and install my Plug and Play printer** box is not checked and click **Next**.

• Select **Create a new port** and then choose **LPR Port** from the **Type of port** drop down menu.

Add Printer Wizard
Select a Printer Port Computers communicate with pinters through ports.
Select the port you want your printer to use. If the port is not listed, you can create a new port.
O Live the following port (1711 (Precommended Printer Port)
Numer: Minert compositives user ther UPT1, part to communicate with a local printer. The convention for this part should know accenting (low this)
(Back New) Cancel

- In the Name or address of server providing LPD text box, enter the IP address of the machine on which FTSpooler is installed (e.g.192.168.0.1). In the Name of printer or print queue on that server text box, enter the queue name defined in FTSpooler. Click OK.
- Choose the printer driver according to the final destination printer, and then click **Next**.
- Enter the printer name in the **Printer Name** text box. We recommend clearly labelling this as a "virtual" FormTrap queue by using the following format: **Q_location** to a **MAXIMUM of TWELVE characters**. Click **Next**.

• Select the **Share as** option and use the same printer name used in step above. Click **Next**.

Printer Sharing	A
You can share thi	s printer with other network, users.
suggested name o users.	re this printer, you must provide a share name. You can use the a type a new one. The share name will be visible to other network.
O Dg not share t	
Share name:	Q_location

- In the Location and Comment window, enter related information and then click Next.
- Select No on Print Test Page and click Next.
- Click **Finish** button to complete the installation.

Note: Setup process may alter for different operating system.

Printing from UNIX applications

These printers act as redirection tools so applications can print to the FTSpooler queues. Before creating your LPR printers create the corresponding queues in FTSpooler. The name(s) of the FTSpooler queue(s) are used when creating the LPR port.

More Information on Creating a FTSpooler Queue see page 4.

The following table splits the different UNIX-based platforms on which FormTrap runs according to their basic printing subsystem. Use the table below as a reference guide when setting up Unix Systems for use with FormTrap.

System V	BSD
SCO Open Server	Linux
SCO Unix Ware	FreeBSD (Linux Binary)
Sun Solaris	HP/Compaq/DEC Tru64
HPUX	

IBM AIX is a special case and does not fall under either category. Please contact us to configure FormTrap to run on IBM AIX.

For a System V UNIX print subsystem:

Description of steps	Commands
Configure your PATH environment variable:	PATH=\$PATH:/usr/bin:/usr/sbin
Shut down the print subsystem:	lpshut
Create the print queue: This creates local print queue named frqueue headed for the remote print queue (rp=) frqueue on the remote machine (rm=) nt_server.	1padmin -pftqueue -v/dev/nu11 -mrmode1 - icmrcmode1 -osmrsmode1 -ob3 -ormnt_server - orpftqueue This should be typed as one lone line.
Enable the new queue for use:	enable fiqueue accept fiqueue Ensure that you are runnign the program /uar/bin/enable and not a shell builtin of the same name.
Bring the print subsystem back up:	lpsched
To view and check the configuration and status of this queue: Print to this Queue	1pstat -pfiqueue
To print to this queue use the command:	1p -dfiqueue myfile

For a BSD UNIX print subsystem:

Configuring Printers in your Application

Once you have created the LPR printers you must then create printers in your application to directly output data to these "virtual printers".

To configure the printer in your application:

• In the printer setup of your program, create new printers to direct output to FormTrap. These should have a meaningful name, or use the same name as the "virtual" printer defined above.

More information on Printing from Windows Applications see page 85.

• For each printer, the device path settings must point to the appropriate LPR printer just created.

Instructions on how to set up the LPR port in your PC

For Windows XP:

- Go to Start menu Control Panel, choose Add or Remove Programs.
- Choose Add/Remove Windows Components and the Windows Components Wizard pops up. Check Other Network File and Print Services option if not selected, then press the Details button.

Windows Components Wizard	
Windows Components You can add or remove components of Windows XP.	Ē.
To add in remove a component, click the checkbox. A shaded box means the part of the component will be installed. To see what's included in a component Details. Components:	
Ministration 20.7	- B
Retworking Services 0.3	MB
🗹 📩 Other Network File and Print Services 0.0	МВ
Contract Contract 0.0	MÐ
R Fall Indete Root Certificates 0.01	with Mark
Description: Shares files and printers on this computer with others on the network	ok.
Total disk space required 76.9 MB Space evailable on disk: 13466.1 MB	ah
C Back Heat >	Cancel

• There will be a list of available subcomponents of **Other Network File and Print Services** in your PC, choose the one called **Print Services for Unix**. Then click **OK**.

Other Network File and Print Services	23
To add or remove a component, click the check to of the component will be installed. To see what's	
Subgomponents of Other Network File and Print S	ervices
🗹 🛃 Print Services for Unix	0.0 MB
Description: Enables UND/ clients to print to an	y printer available to this computer.
Total disk space required 76.9 MB	Details
Space available on disk: 13451.3 MB	
	OK. Cancel

• Click Next in the Windows Components Wizard Screen to finish installation.

Associated Files

What are Associated Files

The Associated File is a powerful facility within FormTrap designed to allow document-specific information to be extracted from a FormTrap form into a separate file at run-time. Most often, the associated file is used to extract delivery details such as the fax number or email address of the recipient, but can be used in conjunction with any user process, either embedded (File and Output Filter processes) or external (written to output and used by external programs).

How Associated Files Work

The Associated File is a simple text file containing entries in a name=value syntax. The name is simply a field name used to identify the data contained in the value. For example, **EmailTo=support@formtrap.com** identifies the value support@formtrap.com as being an EmailTo field.

- Associated file entries may direct processes: archive=yes
- may provide data to a process: DocNum=PO60803
- or may both direct and provide data to a process: EmailTo=support@formtrap.com

Within FTSpooler, there are a number of reserved names that are recognised and used for delivery and archiving purposes.

See the full list of Reserved Names see page 117.

For example, at run time, a print stream maybe split into five documents. As the first of these is formatted an Associated File is produced that contains the entry **FaxTo=1 234 567 8900**. The name **FaxTo** is recognised by FTSpooler as requiring the document to be faxed to the number **1 234 567 8900**. This process is repeated for each and every document with **FaxTo** in the Associated File.

FTSpooler recognizes the reserved names and delivers the document accordingly, however, all names are recorded automatically in the successful or unsuccessful jobs archives with their documents. You can carry out meaningful index data searches using Associated File Names.

You can also utilize user-defined names in any post-processing operations you may wish to perform (usually in the optional write to file or output filter facilities). For example, you may create index keys for long term archiving, or FTP details to aid in automated delivery of large files to alternative printing facilities (e.g. mailing bureau) or even direct delivery to the recipient.

Using Associated Files 3 Steps

To make the effective use of the Associated File facility, these steps are required in the development process:

• Step 1 - Create new text objects in FTDesign to carry the Associated File fields

- Step 2 (optional) Define appropriate identification and split rules in FTSplit-Def
- Step 3 (optional) Configure your FTSpooler queues with the correct Associated File handing options

Special Associated File names defined on forms are available to deliver documents by Email, Fax and to File.

More information on Associated File Reserved Names see page 117.

Other Associated File entries may be used by your own procedures or simply to locate documents from the FTSpooler Archive view.

Step 1 - Create Associated File fields in FTDesign

Text objects of the form **##A#name#data#** generate one line in the output Associated File (suffix .af, txt format in UTF-8,) and do not print. **name** may be a reserved word used for delivery or may be your own name for your own purposes, **data** may be constant or taken from input data. We recommend placing Associated File fields in an "impossible" area such as in the detail area and in color and all together.

The examples below assume operation on a single document file produced via the Splitter.

More information on Associated File Reserved Names see page 117.

Example 1: Emailing the Document using Email Address from Input Data

A client email address within the input data can be used to email a form. At run time, an Associated File entry is created that directs the Spooler to email. The reserved name **SMTPTo** (there is a MAPI equivalent) directs the spooler to email via SMTP.

To Create an Associated File Field in FTDesign:

- Choose **Text** from the **Draw** menu or click the **Text** button in the toolbar.
- Click and drag diagonally to add the text frame.
- Release the mouse and the **Text** dialog box will open.
- On the **Definition** tab, type the associated file command and a sample email address in the **Text** box.

##A#SMTPTo#email@domain.com#

##A#SMTPTo#	Position Font Print rules	
Link selection.		1
Linked records:	46-1	
Sample text	Field name	Edit link
		Delete link

- Highlight the sample email address and click the **Link Selection** button as shown above.
- The **Link to field** dialog box appears. On the field dropdown menu, select a field name or click the **Browse** button to create a new field. The link field must map the email address in the input data file.

💶 Text ob	oject	? 🗙
Definition	Format Position Font Print rules	
##A#SN	1TPTo#email@domain.com#	
Link to	field	2
Field:	E Email	OK
Prefix:		
Suffix:		Ĩ
Mask as	None	

• Click OK.

##A#SMTPTo#« <u>em</u>	iail@domain.com»#	
Link selection	Link all	N
inked records:		- 13
Sample text	Field name	Edit link
email@domain.com	Email	
		Delete link
ananeoonan.com	Lillan	Delete lini

Example 2: Using Substitution

This builds on the previous example, except in this case the client's fax number is not in the input data file. The client's fax number is saved (once only) in a text file where the client number replaces "xxxxx" as part of the file name – for example Fax-xxxx.txt becomes Fax-TCG01.txt . The content of the file "substitutes" into the Associated File field at run time.

One substitution file (**.txt** format, stored as UTF-8) containing their fax number should exist for each client requiring fax delivery where the file name includes their client number (TCG01 in the examples).

To create a substitution file:

- Open Notepad (or other text editors such as Word or PSPad).
- Type in the Associated File commands in the **Notepad**. In our example, the formatted statement will be emailed to support@formtrap.com or (second example) faxed to +61293105172.

Where substitution files contain characters above hex 127 (examples: currencies $\notin \pounds \in$ ¥, symbols © TM ®, foreign letters $\notin \ddot{O} \beta$ etc. or smiley faces) substitution files MUST be saved in UTF-8 format (**Notepad** > **File** > **Save** as window, **Encoding** prompt, **UTF-8** from the drop down list).

📕 Ema	nil-TCG01.txt - Notepad	
<u>Eile E</u> o	lit F <u>o</u> rmat <u>V</u> iew <u>H</u> elp	
suppo	t@formtrap.com	~
	舅 Fax-TCG01.txt - Notepad	
	<u>File E</u> dit F <u>o</u> rmat <u>V</u> iew <u>H</u> elp	
	+61293105172	
		3

- Save the file(s) into the Substitution Folder (**Data folders**, **Add substitutions files** ... from the menu bar).
- The text file name must include client identifier (e.g. include customer number in the substitution file name). TCG01 in this example.

This is the Associated File text object to notify FTSpooler to deliver a fax to the client.

To create a variable substitution field:

- Choose **Text** from the **Draw** menu or click the **Text** in tool bar.
- Click and drag diagonally to add the text frame.
- Release the mouse button and the **Text** dialog box will open.

• On the **Definition** tab, type a sample customer number in the **Text** box.

##A#W2KFax# <mark>00</mark>	<u>enn</u> #	
Link selection.	Link all	
Linked records:	4	
Sample text	Field name	Edit link
		Delete link

- Highlight the sample customer number and click Link Selection button.
- The **Link to field** dialog box will pop up. On the field dropdown menu, select the customer number field name or click the **Browse** button to create a new field.
- Check the **Substitute from file** checkbox, **Prefix** is **Fax-** and **Suffix** is **.txt** in our example. The full file name is then **Fax-CCCNN.txt**.
- **Note:** Suffix, defining the file type, can be any file extension and is normally .txt. Neither prefix nor suffix is mandatory.

ect Format Position Font Print rules	?
ield	? 🛛
E Fax Number	ОК
Fax-	Cancel
tst	1
	Format Position Font Print rules

• Click OK.

##A#W2KFax#« <u>C</u>	<u>CCNN</u> »#	
2		
Link selection.	. Link all	
Linked records:		\mathbf{k}
Sample text	Field name	Edit link
CCCNN	Fax Number	
		Delete link

Example 3: Using Multiple Associated Fields

The Associated file may contain many fields. Furthermore, multiple identical reserved names will either concatenate (for recipients) or subsequent same-named entries are ignored (non-recipients). In the following example, two Associated File entries are created.

To add both the Associated File fields:

- Choose **Text** from the **Draw** menu or click the **Text** in tool bar.
- Click and drag diagonally to add the text frame.
- Release the mouse button and the **Text** dialog box will open.
- On the **Definition** tab, type the associated file commands for email address and subject line, with provision to link to data.

##A#SMTPTo#email@domain.com#

##A#Subj#Our	invoice:	inv-no	against	vour]	PO:	po-num	is attached.	#
in a subscription of the				J		P° man	10 000000000000000000000000000000000000	••

	nail@domain.com# oice: inv-no against your PO; p	o-no is attached.#
Link selection	Link all	
Linked records: Sample text	Field name	Edit link.
		Delete link

• Email address is included as shown in Example 1 or 2.

Text object		?
efinition Format Pos	ition Font Print rules	
##A#SMTPTo#« <u>email</u> ##A#Subj#Our invoice	<u>@domain.com</u> »# e: « <u>inv-no</u> » against your PO:	« <u>po-no</u> » is attached.#
Link selection	Link all	
Sample text	Field name	Edit link
email@domain.com inv-no po-no	Email Invoice PO	Delete link
	ок Б	Cancel Help

Example 3: Using Multiple Associated Fields

This generates three sample entries, one each for Invoice, PO Number and Date. Refer to Step 3 for usage.

To Create an Associated File Field in FTDesign:

- Choose **Text** from the **Draw** menu or click the **Text** button in the tool bar.
- Click and drag diagonally to add the text frame.
- Release the mouse and the **Text** dialog box will open.
- On the **Definition** tab, type the associated file commands for Invoice and PO Number in the **Text** box.

##A#Invoice#invoice#

##A#PO Num#po-num#

##A#Date#doc-date#

##A#Invoice#«i <u>n</u> ##A#PO#«po-nu ##A#Date#due-c	m»#	
Link selective	Link al	
Linked records:		
Sample text	Field name	Edit link
inv-no po-num	Invoice Number PO Number	Delete link

• Link the fields to data as shown. **doc-date** shows custom masking to produce **2010-05-14** as output.

Definition	rject Format Position I	Tant Districtor	2 🗵
A#A#Inv A#A#PO	oice#« <u>inv-no</u> »# #« <u>po-num</u> »# te#due-date#		-
Linked re Sample inv-no po-num	Prefix: Suffix:	bice Date	OK Cancel
	Mask as: Date Input format: Output format: Language: Format options:	Year - Month - Day • Language dependent • English (United States) •	-
	Custom format:	YYYY-MM-DD	1

Step 2 - Define appropriate identification and split rules in FTSplitDef

Configure FTSplitDef to identify the file and to split it into individual documents. Each individual document can be then delivered to an individual recipient.

This step is optional and is normally used when a multi-document file needs to be split to deliver to multiple individual recipients (e-mail, fax, etc).

Create a New Entry

A new entry is created for each different type of document that is recognized. The identification, unwanted page and split rules can then be configured.

- Select New from the Entry menu or click Add new entry button.
- In the Entry box, give a meaningful name to the entry, such as document type.
- Set the Maximum number of rows per page of the sample data.

Note: For Records Mode Files, maximum number of rows per page is alw	ways 1.
--	---------

ОК
Cancel

• Click OK.

The new entry will appear in the bottom left hand corner of the FTSplitDef screen.

≫ D	locun	nent	spli	itter	- fts	tdsj	plit											-		×
Eile	Edit	⊻iev	V E <u>r</u>	itry	<u>R</u> ules	g	ptions	He	lp											
B		ß	73	Ð	Ø		\mathbb{R}^{-}	1	×		Ha	4n	нþ.	=	A	`A	?	ii i		
	/ Inv	oise		T	8				Cal					1 4		17	1-1-6-6	8	<i></i>	
	¥ 1114	oice	1	Туре				- 3	Colu	IWN	Ro	W	- 3	Leng	(n		leight	8 <u> </u>	Comp	aris
				<]					1111										(>
Read	y									No S	ielecti	on						No D	ocumer	1

Load Sample Data

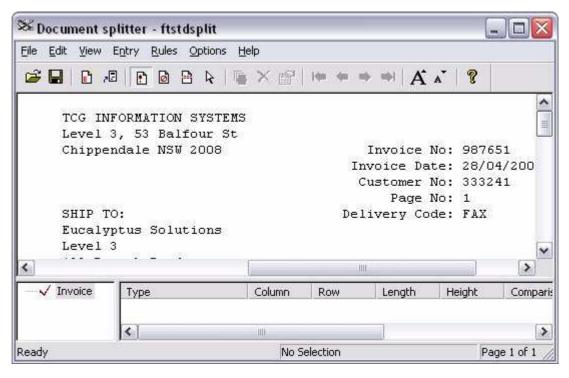
Load a sample data file to use as a test case:

• Select Load print stream from the File menu.

• Select an appropriate test case file in the **Open** dialog box and click the **Open** button.

Open					? 🔀
Open Look in: My Recent Documents Desktop My Documents	examples 1pg_chq.dat 1pg_dirdp.dal 1pg_inv.dat 1pg_pch.dat 1pg_stm.dat 1pg_stm_ema 1pg_stm_file. 1pg_stm_prin 1pg_stm_prin 1nvoice 1pg.d	iil.dat dat t.dat		+ E	
My Computer My Network Places Ascii / Unicode © Auto © Qustom © None	File <u>n</u> ame: Files of <u>type:</u> conversion]1pg_inv.dat ASCII text files (*.txt,*	.dat)	I	<u>O</u> pen Cancel

• The test case data file appears in the main window of the FTSplitDef screen.

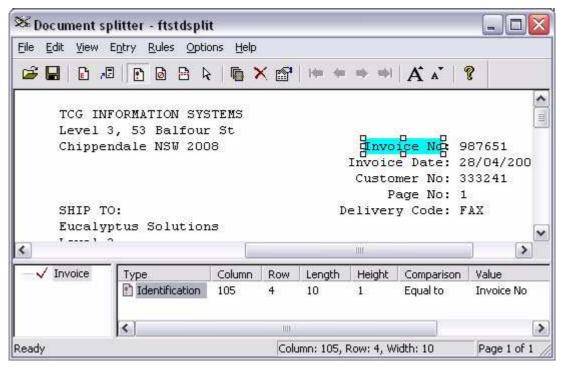


Create an Identification Rule

The identification rule is mandatory and is used by FTSplitDef to determine the type of file being processed. Identification is checked ONCE ONLY, within the first three pages, and the ENTIRE FILE is considered to be that case. To repeat, you cannot use Identification Rule to divide a file into components, the entire file is identified once only.

- Select the Identification rule button
- Highlight the text that will be used to identify the document.

• The identification rule and text used to evaluate the rule, are shown in the rules window.

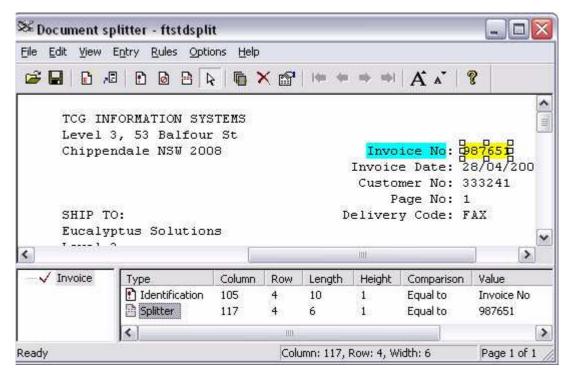


Create a Split Rule

Split rules are optional and are used to split a print run into individual documents. FTSplitDef begins writing data to file until the first split rule succeeds. The file is then closed and FTSplitDef begins writing a new file until the split rule again succeeds. It will do this until the entire file has been processed writing separate files.

- Select the **Split rule** button.
- Highlight the text that you want FTSplitDef to evaluate.

• The split rule, its location, evaluation and the text used to evaluate, are shown in the rules window.



- Two methods to detect the start of a document are commonly used:
 - A change in the document number (as shown above), for which you must change the rule evaluation to "Split on Change" (preferred)
 - Field is equal to **Page: 1**, for which you must "Split on Match and check the rule for "Equal to".

Note: Check that Pages 10,11 ... and 100, 101 ... do NOT overlap on Page 1, otherwise if they do overlap, test for Page: 1 with a blank following.

Create an Unwanted Page Rule

Unwanted page rules are optional and are used to identify unwanted pages such as line-up pages and control totals.

- Select the Unwanted page rule button.
- Highlight the text that you want FTSplitDef to evaluate.

• The unwanted page rule, its location and evaluation and the text used to evaluate, are shown in the rules window.

ca Document s	plitter - ftstdsplit	6						×
<u>Eile E</u> dit ⊻iew	Entry Rules Optio	ins <u>H</u> elp						
🗃 🖬 🗈 🗸		1 👘 🕻	K 😭	Ha da	-	A A	?	
antrol Invoices	Totals for XP	GOOD <mark>E</mark> (versi	ion 3,	21/11/	2007)		^
Credits: Pages: 1								-
					1111		>	~
Pages: 1		Column	Row	Length	Height	Comparison	Value	100
Pages: 1	.86	Column 105	Row 4	Length 10	-	Comparison Equal to		
Pages: 1	86 <u>Type</u>	105			-		Value	
Pages: 1	86 Type Identification	105	4	10	-	Equal to	Value Invoice No	
Pages: 1	86 Type Identification Imwanted p	105 108	4 7	10 25	-	Equal to Equal to	Value Invoice No Control Tot	

Configure the Rule Evaluation

After defining the identification of unwanted and split rules, you may need to configure the rule evaluation for each entry in the rule file.

- Select Evaluation Rules from the Rules menu.
- For each rule type, set whether all rules or at least one rule must be satisfied before the action occurs.
- On the **Split** tab, select the correct **Split on** option.
- Click OK.

] Identification	👌 Unwanted p	bage 🖻 Sp	lit
<u>All must matc</u>			
C Any <u>o</u> ne mate Split on	ched to qualify		
C Match	Change		

Save the rule file

Save rule file and transfer it to the computer where FTSpooler is installed (if Developer's Kit and FTSpooler are installed on different computers). The location where the file should be copied can be found or modified in FTSpooler **Core components Setup**.

More information on Rule Files Location in FTSpooler see page 65.

Configure Rule Evaluation

Double click on the rules to change the properties. Options for **Comparison rules** includes: **Equal to**, **Not equal to**, **Greater than**, **Greater or equal to**, **Less than**, **Less or equal to**, **Empty**, and **Non empty**.

s	? 🗙
4 +	ОК
105 📫	Cancel
10 🕂	
1 🛨	
Equal to	•
Invoice No	
	4 ÷ 105 ÷ 10 ÷ 1 ÷ Equal to

Step 3 - Configure your FTSpooler queues with the correct Associated File handling options

Once the rules for identifying and splitting the documents have been created, FTSpooler must be configured to use the correct rule file.

Configuring FTSpooler settings to apply rule files

To configure FTSpooler:

- Open FTSpooler.
- In the **Queue** Window, select the queue you want to apply rule files on.
- On the **Processing** tab of the **Properties Bar**, select the appropriate rule file from the **Resolve** drop down menu.
- The entries of the Rule file are displayed in the **Formatting and Replication** box on the right.
- Double click on the first entry in the list.
- To add a form, double click on the required entry from the **Formatting and replication** list, then click on **Select forms** to select a form from the drop down list. More than one form can be selected, and the bottom tick box for "Form

name is embedded into the input data" covers that case (uncommon). Multiple forms print in collating sequence of their names as complete sets covering the entire input file.

vailable forms:]creditnote	Selected forms:
purchaseorder remittanceadvice statement taxinvoice	

• To add a queue, double click on the required entry from the **Formatting and replication** list, then click on **Select queues** to select a queue from the drop down list. More than one queue can be selected.

louble-clicking them. ielected items are displayed in the	on the left side by ticking/unticking o list on the right side.
vailable items:	Selected items:
	TCG Involce

- Ensure that you have a form and/or queue selected for each entry in the list.
- Documents not recognized by the rule file are delivered to the -ID FAILURE entry. All entries in the **Formatting and replication** list are defaulted to fail with an error message as they have no forms or queues.

• Click OK.



Configuring Associated File entry options

To configure the Associated File entries options:

- Open FTSpooler.
- In the Queues Window, select the queue you need to configure.
- On the **Processing** tab of the **Properties Bar**, you can see four options for **Associated File entries**:
 - As well as all delivery method(s) (email/fax/print) specified in the Associated File as well as those specified in the Queue properties are used.
 - **Ignore** the Associated File delivery method(s) in the Form are ignored.
 - Overwrite (recipients of the same type) If the delivery method specified in the Associated File and the delivery method specified in the Queue prop-

erties are the same (e.g. both email) then the delivery option specified in the Associated File is used.

• **Overwrite (all recipients)** - Delivery method(s) specified in the Associated File delivery options are used. If there is no delivery method (i.e. recipient) specified in the Associated File, the delivery method specified in the Queue properties is used.

General	Processing	Filters	Print	Email	Fax	File	Applications
<u>R</u> esolve: Format Data fo	formtrap			~	1	ing <u>a</u> nd re Invoice	
Ps Fo Option -xcolo	ormTrap s: r sted file entries	· · · · · · · · · · · · · · · · · · ·				Statemer Statemer Statemer Queu Off Purchase Purchase Oueu Off Remittan Oueu Off Form Queu Off Form Off Form Ofform Off Form Off Form Off Form Off Form Off Off Form Off Off Form Off Form Off Form Off Form Off Form Off Fo	Add/remove queue CG Invoice at s (formatting) ues (replication) Add/remove queue CG Monthly Statement Order s (formatting) ues (replication) Add/remove queue CG Purchase Order ce Advice s (formatting) ues (replication) Add/remove queue CG Remittance
		estore		<u>H</u> elp			

Using Associated Files in FTSpooler Queues Properties

Associated file variables defined on forms are optionally available in queues tabs **Email**, **Fax**, and **File**.

To use associated file values, place square brackets "[" and "]" around the associated file entry name, e.g. [inv-name].

More information on Associated File Entry 3 Steps see page 93.

Configuring Associated File Variables in Queues Properties

The following field in Queues Properties accept Associated File Variables:

- Email tab, Title, Subject line, and Body.
- Fax, Cover page name, Subject line, and Body.
- File tab, File title.

The two following examples are provided to help you understand how to use associated file variables in queues properties.

In this example "[month]" in the **Subject line** inserts the associated file variable **value** for the name **month** (i.e. there is an Associated File line of the form "month=july"). The recipient will see subject as "March Statement" or "April Statement", depending on the associated file value.

Simple e-n	nail queue 🛛 🔯
Name:	Simple Email Queue
<u>T</u> emplate:	ps template
Form:	Ps statement (formtrap)
Engine:	⊙ SMTP ○ Outlook (MAPI)
<u>T</u> itle:	Statement
<u>S</u> ubject:	[month] Statement
<u>B</u> ody:	This is the body.
	OK Cancel

The **File title** field in **File** tab accepts Associated File variables for both folder structure as well as document name in either direct or [name] form. These are examples:

"F:\TCG\Sales\[salesperson]\[customer]\Dr[Invoice].pdf"

where the Associated File contained "salesperson=John-1001", "customer=FormTrap Systems" and "invoice=32245" giving this as the file name:

"F:\TCG\Sales\John-1001\FormTrap Systems\Dr32245.pdf"

"F:\TCG\Sales\[full path]"

where the Associated File contains "full path=Amy-1002 Widgit Brokers Dr32250" giving the result:

"F:\TCG\Sales\Amy-1002\Widgit Brokers\Dr32250"

General	Processing	Filters	Print	Email	Fax	File	Applications	
Destinati	ion folder:							
F:\TCG\								
%fthom	use environmer e%\output files rap\output files		s in the p	ath, exam	ples:			
File title	(optional, defau	ults to ider	tifier):					
[departr	ment]\[custome	r-name]-[customer	-id]\[invoid	:e-id]			
as defini	use associated ng directory str nent]\[customer	ucture, ex	amples:					
Standard	d files:							
Outp	ut file							
Asso	iated file (af)							
🗌 Input	file (txt)							
Output	: filters (addition	nal files) –						
Currer	ntly defined:							
PS2PD	F							
A	ld / Remove							
-			<u></u>					
			_					
APP	ly <u>R</u> e	estore		telp				

Reserved Names

Associated file commands are entered into a text object in FTDesign using the syntax **##A#<name>#<value>#**, where <name> is either a reserved command such as those listed below, or Associated file command for use with archiving or other purposes, and <value> is the field populated by the incoming data stream and/or constant text. Such text objects are not printed by the formatting process, but instead placed line by line into the Associated file. FTSpooler delivers documents using the delivery engine, activated by Associated File reserved names. Each delivery engine implements a different way of outputting formatted documents.

The standard delivery engines are:

Print

E-mail using MAPI (Outlook) or SMTP

Windows Fax Service

Output to directory

A complete list of reserved names is displayed below. Entry names are not case sensitive.

Note: 1. Associated file Reserved Names with no following values ARE IGNORED. Hence an "SMTPTo=" will NOT be delivered to SMTP, it will be ignored.
2. Recipients on Associated File are accumulated. This is in contrast to non-recipients where the first value only is used.

Examples:

Smtpto=paul <paul@formtrap.com>, joe <joe@formtrap.com> Smtpto=adam <adam@formtrap.com> Emails to all three recipients

Non-recipient are different - only the first value is used

Smtpfrom=paul <paul@formtrap.com> Smtpfrom=adam <adam@formtrap.com>

Email is from paul only

Associated File Reserved Names

To see this table online, see

http://www.formtrap.com/enterprise/v7.5/manuals/en/associated_files_reserved_names.html

Delivery Engine	Reserved N	lame	Description		
Print	Recipients	Print	Windows Printer name. This entry tells FTSpooler to print the formatted FormTrap document using the specified windows PCL/PS printer. Ensure the Windows printer name is used and NOT the printer's network path. This is an example: ##A#Print#HP LaserJet 4100N PCL6# Email address of the primary recipient. This entry tells FTSpooler to email the formatted FormTrap		
ΜΑΡΙ	Recipients	EmailTo			
		EmailCC	Email address of the secondary recipient. This entry tells FTSpooler to email a copy of the formatted FormTrap document to the specified email address. This can either be fully qualified (username@domain.com), or a Windows address book name. Multiple entries may be specified, separated by a semi-colon. These are examples: ##A#EmailCC#username@domain.com# ##A#EmailCC#userA@domain.com; userB@domain.com#		

EmailBCC	
Emailbee	Email address of the blind carbon copy recipient. This entry tells FTSpooler to email a copy of the formatted FormTrap document to the specified email address. This email address will NOT be appear on the message. This can either be fully qualified (username@domain.com), or a Windows address book name. Multiple entries may be specified, separated by a semi-colon. These are examples: ##A#EmailBCC#username@domain.com# ##A#EmailBCC#userA@domain.com;
	userB@domain.com#
VSIFAXTo	VSI Fax number. This entry tells FTSpooler that the formatted document is sent to a Esker VSI- FAX Fax engine installed and configured.VSI-FAX provides a comprehensive, multi-platform fax solution for users who requires faxing of any document from any application running on Unix, o Windows 2000/NT/XP. The VSIFAXTo entry can only have one fax number as its value. This is an example: ##A#VSIFAXTo#1 222 333 4444 #

Delivery	Subj	Subject line for emails and faxes with a cover					
Options	300	page. These specified subject line will be added to the email message or to the cover page of the fax This is an example:					
		##A#Subj#Invoice#					
		This Associated File field may contain one or many fields.					
		More information on Using Multiple Associated File Fields					
	EmailTitle	This option names the attached file. This is an example:					
		More information on Using Multiple Associated File Fields This option names the attached file. This is an example: ##A#EmailTitle#Invoice Form# Body text for the email message. The entry must use the full path of the text file that contains the					
	EmailBody						
	EmailFrom	Return email address. This entry can be used to set the return email address for each email message being sent. This is an example: ##A#EmailFrom#username@domain.com#					
	EmailFrom Name	Return email name. This entry can be used to set the name that appears next to the return email address for each email message being sent. This is an example:					
		##A#EmailFromName#Accounts Department#					
	EmailFrom Type	Document type, use internally. This is an example: ##A#EmailFromType#Purchase Order#					

SMTP	Recipients	SMTPTo	SMTP emailing address of the primary recipient. This entry tells FTSpooler to email the formatted FormTrap document to the specified email address. This can either be fully qualified (username@domain.com) or a Windows address book name. Multiple entries may be specified, separated by a semi-colon. These are examples: ##A#SMTPTo#username@domain.com# ##A#SMTPTo#userA@domain.com; userB@domain.com#
		SMTPCC	SMTP emailing address of the secondary recipient. This entry tells FTSpooler to email a copy of the formatted FormTrap document to the specified email address. This can either be fully qualified (username@domain.com), or a Windows address book name. Multiple entries may be specified, separated by a semi-colon. These are examples: ##A#SMTPCC#username@domain.com# ##A#SMTPCC#userA@domain.com; userB@domain.com#
		SMTPBCC	SMTP emailing address of the blind carbon copy recipient. This entry tells FTSpooler to email a copy of the formatted FormTrap document to the specified email address. This email address will NOT be appear on the message. This can either be fully qualified (username@domain.com), or a Windows address book name. Multiple entries may be specified, separated by a semi-colon. These are examples: ##A#SMTPBCC#username@domain.com#
			##A#SMTPBCC#userA@domain.com; userB@domain.com#

Delivery Options	Subj	Subject line for emails and faxes with a cover page. These specified subject line will be added to the email message or to the cover page of the fax. This is an example:
		##A#Subj#Invoice#
		This Associated File field may contain one or many fields. More information on Using Multiple Associated File Fields
	EmailBody	Body text for the email message. The entry must use the full path of the text file that contains the body of the email message. This is an example: ##A#EmailBody#C:\FolderName\File Name.txt#
	EmailTitle	This option names the attached file. This is an example: ##A#EmailTitle#Invoice Form#
	SMTPFrom	Return SMTP email address. This entry can be used to set the return SMTP email address for each email message being sent. This is an example: ##A#SMTPFrom#username@domain.com#
	SMTPFrom Name	Return SMTP email name. This entry can be used to set the name that appears next to the return email address for each email message being sent. This is an example: ##A#SMTPFromName#Accounts
		Department#
		Note: Do NOT include names with punctuation (comm and semi-colon are treated as delimiter), such as "Company, Inc.". This is treated by SMTP as two "nicknames", "Company" and "Inc" where neither wil be found.
	SMTPFrom Type	Document type, use internally. This is an example: ##A#SMTPFromType#Purchase Order#

Windows Fax Service	Recipients	W2KFAX	Recipient Fax Number, Name and Company. This is the only mandatory entry for Windows Fax Service in the Associated File. This entry tells FTSpooler that the document is to be sent to Windows Fax Service for faxing. Name and/or Company are optional entries, separated by a comma. Multiple recipients may be specified, separated by a semi- colon. These are examples: ##A#W2KFAX#1 222 333 4444# ##A#W2KFAX#1 222 333 4444, Name# ##A#W2KFAX#1 222 333 4444, Name, Company# ##A#W2KFAX#1 222 333 4444, , Company# ##A#W2KFAX#1 222 333 4444, , Company# ##A#W2KFAX#1 222 333 4444; 1 222 333 5555#
	Delivery Options	W2KFAX Schedule	Schedule the fax. If omitted, the fax is scheduled immediately. Values allowed are: off peak - scheduled off peak (use message manager to set) hold - hold the message in Outlook parseable date and time - format according to local settings parseable time - sent today at the time, format to local time settings These are examples: ##A#W2KFAXSchedule#offpeak# ##A#W2KFAXSchedule#hold# ##A#W2KFAXSchedule#bold# ##A#W2KFAXSchedule#25/01/01 19:30:00# ##A#W2KFAXSchedule#08:30:00 AM#

		W2KFAXSubj	Subject line for the cover page. This is an example: ##A#W2KFAXSubj#Purchase Order#
			This Associated file field may contain one or many fields. More information on Using Multiple Associated File Fields
		W2KFAXBody	Body text for the cover page. It is ignored if there is no Cover Page specified. The entry may quote a full file name or directly contain the body text. These are examples: ##A#W2KFAXBody#message text#
			##A#W2KEAXBody#C:\FolderName
			##A#W2KFAXBody#C:\FolderName \filename.cvp#
Directory	Recipients	OutFolder	•
Directory Prodocom (fax service)			\filename.cvp# Path for write to file option. This entry is used to set the directory path for the write to file option in FTSpooler. This is an example:

Related Batch Processes

These separately-run programs update system information.

Home Locator changes the folder for the Spooler-specific files (indicated by "fthome") and is normally changed to a separate drive as archive information becomes more extensive than originally planned.

Settings Merger updates system files in response to a file sent from FormTrap Support and Sales. This is normally number of printers upgrades, but may include the client name where the client advises a change in ownership.

Version Upgrade is run when updating to differently numbered version of FormTrap Spooler (eg v6 to v7).

Version Upgrade

Locate Components

Version Upgrade needs to locate the components of FTSpooler, such as queues, forms and rules before it processes the conversion.

Components that may not be obvious include:

- Settings which are transferred from V6 registry files into the XML equivalent in the Version 7.
- Archive transfers data from the V6 "successful jobs" archive (Microsoft DB) to the V7 FireBird DB. Standard location for Version 6 is

C:\Documents and Settings\username\Application Data\TCGIS\Archive.mdb

Note: You must have the FireBird service running for conversion of Archive.

To locate components:

• Initially the **Path** column is blank (uninitialized).

🖸 Version Upgrade	
Location of components for FormTrap Spooler versions 4.0 to 6.4. Click "Locate components" to automatically locate previous version files.	
Locate components Edit component location	
Component Path	1
Queues Forms Rules Settings Archive	Browse
C:\fthome\v7\config.xml	
Conversion report:	

• Click on the Locate components button. The Select Installation screen pops up with a list of available Installation IDs which refer to the windows user IDs. Multiple Installation IDs are displayed as the machine may have more than one login. The Installation ID that last modified a queue is recommended, and always listed first.

nstallation ID		Last time queues were edited
	5-1-5-21-3607604850-1974884577-1546712997-1182	16/10/2008 3:30:34 PM
-1-5-18	2 1 2 L1 200,000 177,000,077 10,07,12,777 110L	File does not exist
omponents for i Component	nstallation selected from the list above:	

- Select one of the Installation IDs to show Components and Paths.
- Click **OK**.

• That path of each individual component can be changed manually. Use this option if program cannot automatically locate components of if you want to import data from alternative locations (for example backed up folders).

Location of components for FormTrap Spooler versions 4.0 to 6.4. Click "Locate components" to automatically locate previous version files. Locate components Edit component location Component Path Queues C:\Documents and Settings\selina\Application Data\TCGIS\ftspool.dat Forms D:\TCGIS Archive\FTDataRoot Rules D:\TCGIS Archive\FTDataRoot Settings S-1-5-21-3607604850-1974884577-1546712997-1182 (TCG-I5\selina) Archive D:\TCGIS Archive Convert all components Convert selected component Location of the configuration file for the new version of FormTrap Spooler: Browse C:\fthome\v7\config.xml Convertsion report:	Version Upg	rade		
Component Path Queues C:\Documents and Settings\selina\Application Data\TCGIS\ftspool.dat Forms D:\TCGIS Archive\FTDataRoot Rules D:\TCGIS Archive\Rules Settings S-1-5-21-3607604850-1974884577-1546712997-1182 (TCG-IS\selina) Archive D:\TCGIS Archive Queues Convert all components Convert all components Convert selected component Location of the configuration file for the new version of FormTrap Spooler: Browse C:\fthome\v7\config.xml D:	ocation of compo	nents for I	ormTrap Spooler versions 4.0 to 6.4. automatically locate previous version files.	
Queues C:\Documents and Settings\selina\Application Data\TCGIS\ftspool.dat Forms D:\TCGIS Archive\FTDataRoot Rules D:\TCGIS Archive\Rules Settings S-1-5-21-3607604850-1974884577-1546712997-1182 (TCG-IS\selina) Archive D:\TCGIS Archive Convert all components Convert selected component cocation of the configuration file for the new version of FormTrap Spooler: Browse C:\fthome\v7\config.xml	Locate compor	ents	Edit component location	
Forms D:\TCGIS Archive\FDataRoot Rules D:\TCGIS Archive\Rules Settings S-1-5-21-3607604850-1974884577-1546712997-1182 (TCG-IS\selina) Archive D:\TCGIS Archive	Component	Path		1
C:\fthome\v7\config.xml	Forms Rules Settings Archive	D:\TCC D:\TCC S-1-5- D:\TCC	IS Archive\FTDataRoot IS Archive\Rules 21-3607604850-1974884577-1546712997-1182 (TCG-IS\s IS Archive	elina)
			file for the new version of FormTrap Spooler:	Browse

To edit the located components:

- Select on one of the components.
- Click on the Edit component location.
- Locate the component in the **Browse** dialog box.
- Click OK.
- **Note:** Please note that the settings component represents user's installation and cannot be changed this way. To select different user installation please click Locate components.

Forms Components

The **Forms** component is the previous Data Folder for FormTrap Spooler (regardless of version). The normal location is:

..\Documents and Setting\username\TCGIS\FTDataRoot for versions 6.x, otherwise

..\TCGIS\FTSpooler\FTDataRoot for versions 5.x and earlier.

For old versions, the program will transfer the files, thus saving the structures and form name association into queues (which would otherwise be lost). This transfers the logic of the Spooler, even though Project files require (new FTDesign) **Project**, **Build** ... with the built file(s) loaded through (FTSpooler) **Data folders**, as below.



Version 7.1 can use 6.4 files without any subsequent Build or Reload forms. Earlier version files cause an error message from **formtrap.exe**.

Convert Components

Version Upgrade converts the selected or all components based on the chosen configuration file. To located the configuration file, manually enter the path in the location text box, or click on the **Browse** button. For contingency purposes you are recommended to backup your existing config.xml file before commencing with conversion.

To convert components:

• Click on the **Convert all components** button, or select on one of the components and click the **Convert selected component** button.

			-			
			iooler versions 4.0 to Ily locate previous vi			
ick cocace comp	ponenes co	Gacomacca	iny locate previous vi			
Locate compor	nents	Edit com	ponent location			
Component	Path					
Queues			Settings\selina\Appl	ication Data\TCGIS	5\ftspool.dat	
Forms Rules		iIS Archive\F iIS Archive\F				
kules Settings			Rules 850-1974884577-15	46712997-1182 (Ti	CG-IS\selina)	
Archive		IS Archive	555 197 100 1577-15	10/12/07/1102 (1	-9 19(90000)	
1912 - 1912 - 1913 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 - 1914 -	0.2934.0232	1978 (MARINA MARINA CANANA				
Convert all (components		Convert selecte	d component	1	
<u>C</u> onvert all (components	5	Convert selecte	d component)	
		Community	Convert selecte)	Browse
cation of the co	onfiguration	Community	<u>.</u>			Browse
cation of the co :\fthome\v7\col	onfiguration nfig.xml	Community	<u>.</u>)	Browse
cation of the co :\fthome\v7\coi onversion report	onfiguration nfig.xml t:	file for the I	new version of Form	Trap Spooler:)	Browse
cation of the co :\fthome\v7\co onversion report no files have bee	onfiguration nfig.xml t: en copied fr	file for the i	new version of Form	Trap Spooler: pot\TCG Statement		
cation of the co :\fthome\v7\co onversion report no files have bee :6 files of 16 ha	onfiguration nfig.xml t: en copied fr ve been cop	rom [D:\TCG	new version of Form iIS Archive\FTDataR :\TCGIS Archive\FTI	Trap Spooler: pot\TCG Statemenl DataRoot\TCG Stat	tement\FTDATA]
cation of the co :\fthome\v7\co onversion report to files have bee 6 files of 16 have to files have bee	nfiguration nfig.xml t: en copied fr ve been cop en copied fr	rom [D:\TCG	new version of Form	Trap Spooler: pot\TCG Statemenl DataRoot\TCG Stat	tement\FTDATA]
cation of the co :\fthome\v7\co onversion report no files have bee 16 files of 16 ha	nfiguration nfig.xml t: en copied fr ve been cop en copied fr en copied	rom [D:\TCG pied from [D:\TCG	new version of Form iIS Archive\FTDataR :\TCGIS Archive\FTI	Trap Spooler: pot\TCG Statemenl DataRoot\TCG Stat	tement\FTDATA]
cation of the co :\fthome\v7\co onversion report o files have been o files have been o files have been moorted 2 licens mported 2 licens	nfiguration nfig.xml t: en copied fr ve been cop en copied fr en copied sed printers out root dire	rom [D:\TCG pied from [D rom [D:\TCG rom [D:\TCG s, ctory name:	new version of Form iIS Archive\FTDataR :\TCGIS Archive\FTI	Trap Spooler: Dot\TCG Statemen DataRoot\TCG Statemen Dot\TCG Statemen	tement\FTDATA t\FTDATA\FTSU]
cation of the co :\fthome\v7\co onversion report o files have been 6 files of 16 have o files have been o files have been mported 2 licen	nfiguration nfig.xml t: en copied fr en copied fr en copied sed printers out root dire re\archive.m	rom [D:\TCG pied from [D rom [D:\TCG rom [D:\TCG s, ctory name:	new version of Form IS Archive\FTDataR :\TCGIS Archive\FTD IS Archive\FTDataR	Trap Spooler: Dot\TCG Statemen DataRoot\TCG Statemen Dot\TCG Statemen	tement\FTDATA t\FTDATA\FTSU]

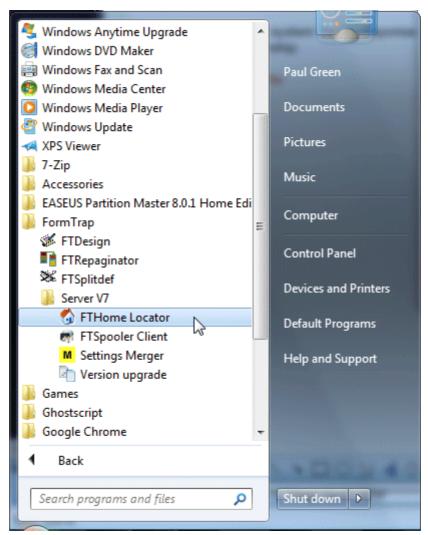
• The **Conversion report** shows the processes that are done.

Home Locator

Home Locator changes the address of the Spooler files and FireBird DB.

Before running Home Locator, please do the following:

- (optionally) run **Setup**, **Archive**, **Backup** and **Restore** to compress the DB back to the current record limit.
- From **Control Panel**, **Administrative Tools**, **Services**, stop **FormTrap Server** and **FireBird** (in that order).
- Copy the folder **C:\fthome\v7** to its required new location.



Home Locator is contained in the FormTrap, Spooler program group:

This window opens, showing the address of the current "fthome" folder. Select **Change home directory...** and select the new "fthome" folder.

🚳 FormTra	p Home			23
2. Before d (Enterprise	gram requires elevation of hanging home directory	of privileges (should be run 'A please exit FormTrap (SBE ed		
C:\fthome	.\v7			
Chan	ge home directory		[Close
	Browse for Folder		x	
	Browse for FormTrap	home folder		
	▲ 🌺 fthc ▲ 🍑 ▷	me v7 b Body Texts data DelTemp input Repagination Rules rules subst subst subst work	E	
		OK	Cancel	

Restart FireBird and FormTrap Server (in that order).

Settings Merger

Settings Merger updates the spooler control files with new or replacement information and is run whenever FormTrap Support or your vendor sends a new License Upgrade file to you. License Upgrade is an executable which runs an InstallShield procedure which includes stopping the FormTrap Server, running the update and restarting the FormTrap Server.

After running you should see changes to the **Licensed to:** display at the top of the FTClient display in either or both of organization name and number of printers.

Registry Update to FormTrap Spooler

Installing .reg files under a 64-bit operating system

FormTrap comprises a 32-bit FTDesign module and a 32-bit (normal) or 64-bit (additional cost) Production System.

For the 32-bit versions, you may be running on either a 32-bit or 64-bit machine.

We will occasionally send out Registry Updates to either FTDesign or to the Production Systems (Enterprise or SBE Spoolers), you will need to select the correct version of regedit.exe to install those updates.

32-bit program on 32-bit operating system or run the .reg file sent to you

64-bit program on 64-bit operating system

save the registry.zip file sent to you to the machine running that program, also save it where you saved your original InstallShield program uploaded from the web site that represents your current installation

stop the program or service

double-click the registry.zip file

click the .reg file shown to update your registry

restart the program or service

32-bit program run on 64-bit operating system - you must select the correct version of regedit. The **32-bit version is in folder ..\Windows\syswow64**\ Do the following:

unzip the registry.zip file sent to you and save the file on the machine to be updated, also save it where you saved your original InstallShield program uploaded from the web site that represents your current installation

stop the program or service

connect to the ..\Windows\syswow64\ folder

right-click on the Windows icon at screen left, Properties, open the Windows Command Processor at the top of the list for a CMD line (DOS Command)

key in the command regedit.exe <registry.reg>

restart the program or service

Other Add-Ons

Prodocom Fax

Using Prodocom Fax with FTSpooler Version 7

Prodocom provides faxing services for FormTrap clients who prefer not to get involved with the infrastructure and hassles of managing their own faxing. FormTrap has been "handing off" to Prodocom for at least 10 years with reliable service provided all of that time. The handoff to Prodocom is via the Web and Prodocom provides an online monitor to see all of your in flight faxes. The name "NetFax" is used to provide compatibility with prior versions.

Form changes (upgrade)

For forms that already use Prodocom (NetFax) no changes required as they already incorporate the NetFax Associated File fields.

New forms

For new forms include at minimum the "NextFax" associated file field.

- ##A#Netfax#0293105172#
- ##A#Netfax#0293105172, Paul Green#
- ##A#Netfax#0293105172,, TCG Information Systems Pty. Ltd.#
- ##A#Netfax#0293105172, Paul Green, TCG Information Systems Pty. Ltd.#

The remaining fields are optional:

- ##A#DocID#123454678# document identifier, use to track your jobs.
- ##A#DocType#Purch Ord# document type, use to track your jobs.

Installation

Prodocom is installed after FormTrap Server.

Have your technical staff "poke a hole" in the firewall to allow direct communication between your FormTrap Server and the Prodocom Server. The port used is **6721**. Prodocom's server address is **202.92.68.243**.

Stop the FormTrap Spooler server and install Prodocom. Restart the FormTrap Spooler Service. Check that these two programs are running:

- Send Service.exe
- Rip2CompName.exe

These are Prodocom programs and communicate securely and directly between your FormTrap Spooler Service machine and the Prodocom Server.

Track fax jobs

Use login name and password provided by the Prodocom to login to www.prodocom.com.au and track the jobs.

Replace Filter

Note: This software is supplied with three months warranty, with no ongoing support or charges. It is designed for single-byte encoding systems only.

Introduction

This filter is used to modify FormTrap input or output. Data to change is recognised by a character string, with optional replacement of that character string. To delete, use " "" as the empty replace string.

Components

There are two components to the filter:

- 1. **replace.exe** the executable program
- 2. **replace.ini** stores character sequences to be identified and replaced and must be in the same directory as the program.

Both are normally in the same %ftinst% folder.

Format of replace.ini

replace.ini is built in sections. Sections are set up in the following format:

```
[section]
"old_string" "new_string" all/first
```

Where

- **section** is a name to identify this operation;
- "old string" is the string to be replaced;
- "new string" is the replacement; and
- <all/first\$gt; defines whether the replacement should occur on only the first instance or all instances of the string in the file.

For example, a section to select output bin 2, normal on the HP 9040 with the optional HP Q5693A 8-bin mailbox is shown below:

```
[OutputBin2Normal]"@PJL COMMENT" "@PJL SET OUT-
BIN=OPTIONALOUTBIN2\0D\0A@PJL SET
FINISH=NONE\0D\0A@PJL COMMENT" First (all on one line)
```

Special Characters: Unprintable characters (eg. escape, form feed) are represented by using a backslash "\" character followed by the ASCII representation of the character in hexidecimal format. For example, the escape character is represented as "**\1b**" - any case for characters a-f (A-F).

Multiple "old string" "new string" "all/first" lines may be provided and are inspected in the order given. Already processed replacement strings are NOT reinspected.

Usage - Command Line

Command line is the norm for Unix/Linux and may be used for Windows outside of the normal Spooler procedure. You can use "replace" on any file, outside of FormTrap. The filter takes three parameters:

input file

output file

section name.

For example:

replace "c:\files\input.pcl" "c:\formtrap\output.pcl"
short

Installation within Spooler V7 via Setup

This is the norm for the replace filter, where each **Section** is a different filter within **Setup**. Filters are normally invoked as **External input** (and MUST precede the "**Western**" filter) or invoked as **Post formatting** filter for output manipulation (normally to drive special features of laser printers).

Version 7 Installation, SBE and Enterprise:

Copy **replace.exe** and **replace.ini** to the %ftinst% folder.

Define each different required **Section** in **Setup**, **Filters** (see the manual page via F1 and below) and invoke via **Queues**, **Filters** tab.

This is the Setup Filters screen for the filter to output to Bin 2, Normal for the HP 9040 with HP Q5693A 8-bin mailbox attached.

Core components	Available filters:	Properties of HP9040 Bin 2 Normal output
Archive Settings Filters Run Users Data input File system LP (Line printer) Named pipes Delivery Print servers Printer licensing E-mai Applications Monitor	Available filters: Arabic As400filter Cate Statement Repaginate as F CateEquipment Chinese Simplified (936) Chinese Traditional (950) CR to LF dbprodo Delivery selection Delivery selection v2 Find PROJECT replace with Std S FTLabelPrint Auction Label to Por HP9040 Bin 2 Normal output MBF Add Trailer as Hdr MBF Repag RemHdrs Payment initial repaginate PCL to TIFF PCLXL to any printer PCLXL to Canon iP100 on Plato PCLXL to TIFF PostScript to PDF PostScript to PDF PostScript to TIFF Preliminary Cheque Filter Remove Leading Nulls Remove PCL5 escapes Replace data name Replace T&B Project TIFF rotate Western	Properties of HP9040 Bin 2 Normal output Name: HP9040 Bin 2 Normal output Description: Select Bin 2 on the HP9040 face down for output Path: replace.exe Arguments: - OutputBin2Normal Initial directory: Initial directory: Input type: txt V Check status Imput type: V Check status Require output V Use standard input/output Hide console (will fail for GUI application) Hide GUI window (will fail for console) Image: two output

Special Forms

This section gathers a number of article previously published in the Knowledge Base on the website (www.FormTrap.com).

The articles describe and provide examples of special forms and documents that FormTrap can handle.

CSV Output File

Comvita (NZ Medical Honey company) use a third party fulfillment system in Hong Kong to fill orders and required an automated way to get the data from their QAD picking/invoicing systems to the third party. After discussion with TCG we designed a form to pass the data to the third party computer fulfillment system using Separated Files produced from FormTrap.

You can output a CSV file using the Associated File command, like this:

S FTDesign - [FT-cvt_hkg_intf]								
🗇 File Edit View Define Draw Go Project Tools Window Help								
D 📽 🖬 🚳 🌇 NPLATO\HP Color Las 🖳 🐰 🐿 🛍 📾 👘 🕫 🗠 🖂 🎛 🛱 🦹 🖊 — I 🗆 🔿 T 💷 🕌								
1 12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1								
+ + + ∓ + = @ @ - @ ® = = ⊕ # @								
SASHEADERS;Trns-Site-INT-TRSF;Cust_nbr;CUST_NAME;SHIP_TO;INTERSITE;Intersite Order;Input data is invalid;REMARES;\$ SASHEADER\$;Trns-Site-INT-TRSF;Cust nbr;CUST_NAME;SHIP_TO;INTERSITE;Intersite Order;Input data is invalid;REMARES;\$								
AREAASHIPTO#, SHIPTO NAME: ADDRESS LINE1: ADDRESS LINE2; ADDRESS LINE3; ADDRESS LINE4; COUNTRY; #								
tatsHIPTO;SHIPTO_NAME; ADDRESS_LIME1; ADDRESS_LIME2;ADDRESS_LIME3; ADDRESS_LIME4;COUNTRY;4								
**A*DETAIL*: Part_Nbr;de*clxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx								

Text object								
Definition Format Position Font Print rules								
##A#SHIPTO#:«SHIPTO_NAME»: «ADDRESS_LINE1»: «ADDRESS_LINE2»:«ADDRESS_LINE3»: «ADDRESS_LINE4»:«COUNTRY»:#								
Link selection Link al								
Linked records:								
Sample text Field name A Edit Ink								
SHIPTO_NAME rct_ste_name								
ADDRESS_LINE1 Ste_addr1 E Delete link.								
ADDRESS_LINE3 site_addr3 ADDRESS_LINE4 site_addr4								
OK Cancel Help								

Here we construct Associated File lines with all of the fields required, starting with the ; (semi-colon) separator (so this is strictly a semi-colon separated file). The same is done for the initial "Header" portion and for each of the Detail and Comment lines as well. The Red items are missing the initial #, hence print and are used for checking the output during testing. These are taken out for production (subsequent provision in FTDesign to look at the Associated File now makes the red lines redundant).

This is the output.

9							
HEADER=; 308-06/04	/2009; 302 ;Department	Store Counter	; 302	;Department			Order;08/02/2011;REMARKS;
SHIPTO=;Department	t Store Counter ; ; ;T: HUNI DAY SACH 1.5ML	SUEN WAN		; ;HONG NON			
				100.00;160			
	HUNI NIGHT SACH 1.5ML		-	100.00;160			
DETAIL=:363 ;1			1	18.00;158	97299	;31/03/2011;	18.007
	act Label 5332C To Each Un	110					
	PROP LOZ CMINT SOOG		1	4.00;3		;01/03/2011;	4.007
	sot Label 5333C To Each Un	11C					
	BAG BLK 39X34X10 PP		1			20.003	
	BAG BLK 26X31X10 PP		2			30.00;	
DETAIL=:5351A :1			2				
	BOOK RITCHA OLIVE CHN		2				
DETAIL=:860 :0			2	12.00;155	47457	;28/07/2010;	12.00;
	ict Label 5314A To Each Us	115					
	HUNI CLEANSER SACH 1.5ML			100.00;160			
	HUNI SERUM SCHET 1.5ML		2				
	HUNI WHING SACH 1.5ML	Ť	2			;28/02/2011;	
DETAIL=:EXP112 :1		*	2	36.00;161	19880	;28/02/2014;	36.00;
	ict Label 5300A To Each Us	1it					
DETAIL=;EXP170 ;1			1	12.00;157	5702	;28/01/2014;	12.00;
CMMT=;Attach Prod:	uct Label 5305A To Each Us	11t					
DETAIL=; EXP373 ;1			1	48.00;161	11841	;28/01/2014;	48.00;
CNMT=;Attach Prod:	uct Label 5301A To Each Un	11t					
HEADER=; 308-06/04	/2009; 302 ;Department	Store Counter	; 302	/Department	Store Co	unter ;Intersite	Order:08/02/2011;REMARKS
SHIPTO=;Department	t Store Counter 3 3 3TS	SUEN WAN		1 JHONG KON	G	1	
DETAIL=:EXP477 1	RJ CAPS 365		1	12.00/158	54254	;28/06/2010;	12.007
	uct Label 5310A To Each Us	11t					
DETAIL=:EXP486 ;1	RJ CAPS €0		2	12.00;159	26003	;28/06/2010;	12.00;
CMMT=;Attach Frod	ict Label 5310A To Each Us	11t					
DETAIL=;HK289 ;	PROP CAPS PFL15 365 NZ		2	12.00;156	41956	;09/02/2013;	12.00;
CHMT=;Attach Frod	lot Label 5321B To Each Us	11E					

Spaces etc, can be removed if required by masking and there is no "maximum length" on the output.

Please note these two items:

- 1. Headings are best done on the Trailer label (i.e. you get one record per input document). Details will be produced as they occur so are in sequence. This document has no "trailer" so the Associated File records for Header and Trailer are duplicated further down.
- 2. The first character in the "detail" section must be the separator.

Follow-up via Email from Customer, one month later:

Headers on a CSV file, only 1 required.

Hi Paul,

How do I prevent the HEADER from repeating if there are more than 1 pages?

We should only get the HEADER on top of page 1.

Cheers

Comvita

From: paul [mailto:paul.green@formtrap.com]

Hi Comvita,

Use Print Rules to do this only for "Page: 1" (on both Header fields).

Hi Paul,
Job done!
That was so easy thank you very much.
Cheers
Comvita

QAD Forms in Chinese

This covers implementation of a form in Chinese for a Western company with a Chinese manufacturing branch, wanting to place orders on other Chinese companies in Chinese. The example used was Australian company AUSTRAL GROUP who have kindly allowed their example to be used in this tutorial.

The ?? (Gweilo – Google it) designing the form does not understand Chinese but has someone who does that he can refer to for a final validation.

Preparatory Work

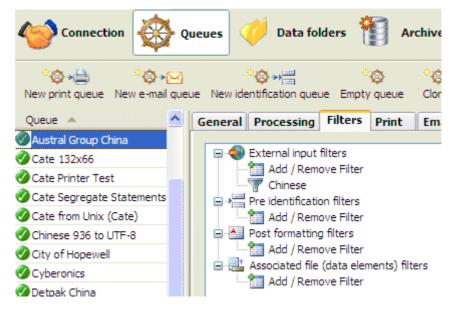
You require two identical data files, produced using a "locale Chinese", one with English and one with Chinese literals. These are output by the QAD "standard report writer" with items below the line turned off (i.e. without any PCL or other printer language inserts). The files are run through the Spooler, with the Input Filter "Chinese (936)" applied, then saved back into a folder as "**filenameC UTF-8.txt**" (Chinese) and "**filenameE UTF-8.txt**" (English).

All form design is done on an English locale machine. The original English file is used to recognize data, with **filenameC UTF-8.txt** used to copy literals. Most sites will require both a Chinese and English version of the form. This is the Spooler setup for UTF-8 conversion:

Connection	Queues 🧭 Data folders 👔 Archive 🍃
* @ * @ *	° ⊗ →≓ °⊗ °⊗+
New print queue New e-mail qu	ueue New identification queue Empty queue Clone
Queue 🔺	General Processing Filters Print Email
Austral Group China	Queue name: Austral Group China
Cate 132x66	Data Input
Cate Printer Test	
Cate Segregate Statements	Input services:
Cate from Unix (Cate)	Line printer (LP) Security
Chinese 936 to UTF-8	View Prile system Options
City of Hopewell	
Ocyberonics	
🖉 Detpak China	Notify
Ø Deutsche	Notification Type:
Email - PCLXL forms	Do not notify
Email - PostScript forms	E-mail address (name@domain):
FAX - PCL forms	
FAX - PCLXL forms	
FAX - Postscript forms	Archive
Force 10 Dual Documents	✓ Number of days to keep records:
FormTrap Load File	
Fraser Process (paul)	2
🖉 Fraser Split (paul)	
🧭 Golden North RA	Treat absence of recipients as an error
ICIW	Keep replication order

General tab, Archive and Treat absence of recipients as an error:

and the Filters tab:



Repagination

In FTDesign, load the original Chinese file (Tools, Load data file ...) with

	Filters
Custom,	

and select **Chinese (936) to Unicode** as the load parameters:

Open		
Look in: 🗀 Data Files	- 🔁 📸 🖃 -	
1018ae.txt 295 1020.txt 11000	53.txt 56-Austral Group China.txt 152.txt 159.txt Input Filters	
File name:	List of currently selected filters: Chinese (936) to Unicode	Add
Files of type: Data Files (*.dat;*.bt) Ascii / Unicode conversion C Auto C Custom Filters C None	1	OK Cancel

Repaginate by comparing to the Notepad view of the English UTF-8 file. Results are shown below:

E FT Rep	aginator -	- [China-PO (nev	v).rpg]	
Fie Ec	dit View D	nsert Tools Wind	ow Help	
0 📽 🛛	🖬 🚖 🛷	(6 × 18)	B = 1 A * 8	
😑 📑 Entr		S:\Customers\Aust	tral Group (formerly Refrigeration)/(China I	Forms\Data Files\1020.txt
and the second s	Header	2		
	Footer Data (1)	2		
	Data (2)	2 9		\frown
🤹 🖉 I	Data (3)		冷(苏州)有限公司	采购单
±-≡ (Data (4)	江苏省苏	州高新区科技城国	
		満江路58 苏州 21	号7号厂房	订单号: 1020 版本: 05 订货日期: 10/06/18 页号: 19
		Chine 21	5153	打印只相, 10/06/18 贝马: 1
			020e UTF-8.txt - Notepad	
		¶ Fle	Edit Format View Help	
		江浦	斯特制令(苏州)有限公司 苏省苏州高新区科技域 江路58号7号厂房 州 215153	PURCHASE ORDER Order Number: 1018 Revision 0 Order Date: 16/06/10 Page: 1
	- 1	苏州	215153	苏州 2151539
		Chin	a	Chinag
		2	それ そうしょう いるのをおおお しんしょう しんしょ しんしょ	
			认: ¥	供应商电话: TELEPHONENOXXXXX4
		采购 支付方		联系人:g 发货方式: SHIP VIA ON ADD MSIRg
		200	30 DAYS FROM INVOICE	离岸价格: FOB TRAILER OPTIONALS
		8	- WEARED DEMADUR ETETRY	******
Area	Name	Rule	Condition	Column Length
Header	Field (1)	Equal to	采购单	73 8
Header	Field (2)	Equal to	页号: 1	72 9

File Edit View	Insert Tools Window Help	
🗅 📽 🖬 🛳	≠ 🗗 × 5 🖬 8 = t A 🖍 🕈	
Entry (1) Header Footer Data (1) Data (2) Data (3)	S:\Customers\Austral Group (formerly Refrigeration)\China Forms\Data Files\1020.txt 写 行 物料号 工 截止日期 短缺量 UN 单位成本 1020e UTF-8.txt - Notepad	成本合计s
	File Edit Format View Help	
	In Item Number T Due Date Qty Open UM Unit Cost Extended Cost	~

Form Constants

Take these from the same position on the report via Copy from the Notepad Chinese version and paste via Ctrl+V into the literal on the FormTrap form. See below for illustration:

Notepad, cutting the literal "Order Number" in Chinese:



FormTrap, copying "Order Number" in Chinese (use Ctrl+V):

FTDesign	- [China PO (tcg).frm]	- 08
	View Define Draw Go Project Tools Window Help	- 0
0 🥔 🖬	● PS \PLATO \PP Color Laser3 • 基 階 簡 雪 ∽ ∽ 因 部 😵 米 − □ ○ T 🎟 👪) 邱 = ↓ + + + +	64
SimSun	y 「 A x B X U © H + +) 不 \$ ± 言 ④ ℚ - @ 限 Ⅲ Ⅲ ⊕ ‡ ℚ	
	澳斯特制冷科技(苏州)有限公司 江苏省苏州高新区科技城漓江路58号7号厂房 邮编: 215153 电话: +86 (0)512 6689 6001 传真: +86 (0)512 6689 0090	
	VENDOR NAME X Yendor Address 1 Text object Yendor Address 1	
	Vendor Address 2 Vendor Address 3 Vendor Address 3 Vendor Address 4 Vendor Address 5 Image: Contact make (Under Ship To) 联系人 Contact Image: Contact make (Under Ship To)	
₿.	澳斯特制冷(苏州)有限公司	

? Text object ١ PLICATE Definition Format Position Fort Print rules 13/423 7 订单号 PO 本 101 供应商编号 确认 是 0 Link all Linked records Sample text Field name 期 201 힜 Page No Doc page count 打印日期 201 联系 To) OK Cancel Help Con

Special characters and strings, such as page number are shown here, this field is shown below:

This is "accepted" format for Chinese equivalent of "Page 1 of 2" in English. **These are other "constants" you may require in the finished output:** "Brought forward"



"Carried forward to Page 2"

结转到第	2页	121,212.	.33
Text object			? 🛛
Definition Format	Position Font Pri	nt rules	
· / / / / / / / / / / / / / / / / / / /			
Link selection.	Linka	al I	
Linked records:			
Sample text	Field name	Edit	ink.
2	Next Page No		

Other can be taken from the PDF but please ensure the finished form is checked carefully by a person educated in China.

Other "Substitution" Translations:

This form had a number of literals, for which Chinese translation was required. These include Units of Measure, Final (and while not done in this instance) Terms and Freight Terms.

Literals for "Units of Measure" (UoM) were supplied in Spread Sheet format, see below, and Cut and Pasted into individual .txt files for use as substitutions. See the screen shots following for details.

	A	В	C	D	🔄 🏠 Chinese UoM		
1	Value	Comments	Chinese		File Edit Vew Favorites Tools	нер	100000
2	BX	BOX	盒		3 teck + 3 - 3 / 2 s	222 👝	Tables (TTT) -
3	CL	COIL	盘			earon 6	Hoders .
4	CY	CYLINDER	桶		Address 🗀 S:\Customers\Austral Group	(formerly Re	effigeration)\China Porns
5	EA	EACH	个		Folders	×	Name -
6	FT	FOOT	英尺		🕞 Desktop 🗄 😂 My Documents	^	China UOM BK.txt
7	G	GRAM	克		E S My Computer		China UOM-CY. bit
8	KG	KILOGRAM	公斤		🗟 💝 Local Disk (C:)		China UOM-EA.bxt
9	L	LITRE	升		B 👶 DVD Drive (D:) Removable Disk (E:)		China UOM-G.b.t
10	LG	LENGTH	China UOM	KG.txt - Note			China UOM-KG.txt
11	M	METRE	File Edit Forma				China UOM-LG.b.t
12	ML	MILLILITRE	公斤		×.		China UOM-M.txt
13	MM	MILLIMETRE			14		China UOM-ML.bxt

In the form, substitution of the literals from the Substitution .txt files is shown in this screen shot:

Text object	2 🗙
Definition Format Position Font F	Print rules 数量 量单位 单价
« <u>UoM</u> »	212.33 121,212.33 121 ມັດຫຼື
	Link to field
Link selection Link Linked records: Sample text Field name	Substitute from file Cancel
Sample text Field name UoM UoM	Prefix: Onina UoM- Suffix: Jot Mask as: Oustom
ок	Suppression
渝(☆州)有限公司 州高新区科技城 号7号厂房 5153	Input: Suppress spaces only Output: Space replaces suppressed character
商: 00050014	
特制冷(言州)有限公司 省主州高新区科技城 路58号7号厂房 215158	

Multi-Page Forms

FormTrap is capable of generating contracts using either sub-forms to move between pages or using detail lines to move between pages. Note that FormTrap was not designed to operate in this way, but does a great job provided the bulk of the contents do not vary by more than a few lines for each page. If you are inserting long blocks of text from data then you may end up with "short" pages.

We supply better products, including Forms-on-Demand which is designed to allow form design as well as "filling-in" on computer, saving both the data and a PDF of the document. Form-on- Demand allows for logic within the form and is specifically for manual computer data entry, whereas FormTrap is designed for automated operations.

Using Sub-Forms as Pages

These are the recommendations for sub-forms as pages, with a limit of 9 pages (one for each of the available sub-form letters, plus the Base Page).

Please look at example files by downloading the "Multi-page Subforms.zip" file, unzip it and open documents and read along with this, starting with Multi-page Subform.frm. Note that this used Records Mode, but that the same thing is possible (a little more difficult) using Print Line Extract.

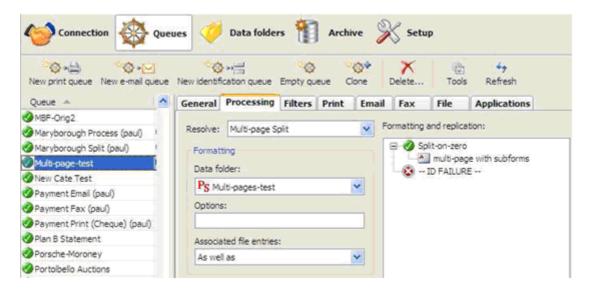
- 1. All data is carried in the Base Page record we've shown it on the form in red, but for most contacts you will not want to have a Base Page for a contract. Typical data elements are compnay names, abbreviations, person names and titles, addresses, dates, products and amounts.
- 2. Base Page with Copy Control as shown for duplex contracts.

Base page	? 🛛
Page Settings D	etail Area Copy control Records
Copy #1	Source: Default Destination: Duplex Stamp w : None Duplex with: None First Page Source:
Add	First Page Destination:
Delete	
	OK Cancel Help

3. Each sub-form fills one page and (apart from the first) has these attributes:

	Base page of all forms contai Data elements are Name (Pa
Subform	? 🔀
Settings Records	1
Name: 2 - Subf Record mode identif Page break befo Page break afte	ier: 2 💌
☐ Keep data	
OK	Cancel Help

4. Your Document Maximum Pages with this approach is 9 pages. To see the results, please load the supplied .asc file into your spooler, set the queue up like this and view the archive to see results:



Using Detail Lines as Pages

The same approach can be used with detail lines if you require a document beyond 9 pages, giving a maximum of 35 pages (9 sub-forms plus 26 detail lines).

You would adopt the same approach, with this as the detail:

ub-forms show as Sub-form	Detail line	? 🔀
	Settings Advanced Records	
	Name: <mark>B - Detail line</mark>	
	Height: 2000.00 (300 dpi)	
	Page break before	
	🔲 Page break after	
This is a detail line record this record also has acces	Widow/Orphan: 0.00 (300 dpi)	
fields such as 31 12 2009.	Record mode identifier: B	
This is Sul		
This is Sub-Forn	OK Cancel H	lelp

In Records Mode, details and sub-forms can be mixed and appear in the order of the file. Please Load and look at the second set of form and data with the name "Multi-page Subforms and Details" for an example.

Personal Emails

Klinger wanted their Order Acknowledgements to be immediately directed back to customers via a PDF Email, and wanted the person responsible for the order to be the "From" email address. Klinger believes this both enhances communication as well as keeping the Klinger staff members "in the loop" with their clients.

In FormTrap this is simple, PROVIDED two pieces of data are present in the incoming data. These are:

either the Client Email address or the **Client Number** (see below) to select the email address for the client;

and the Klinger Employee email address or **Employee Identification** (see below) to select the From email address. In Klinger's case this is the employee initials. Substitution uses known data to access and insert other data (identified by the known data). In this case Client Email is identified by the Client Number and Sender Email is identified by Employee Initials. These are typical examples, showing the actual screen shots from the FormTrap Developer's Kit that provides the data source to FormTrap:

Text object Definition Format Por ##A#SMTPTo#eCust ##A#SMTPFrom#eEr	sition Fo get email ad and "From")	d by SMTP to dresses "To"		
Link selection Linked records: Sample text CustNo Empl-Inits	Link al Field name bilto no salesper[1]	Edit link		
Field: E billto no		OK Cancel		SUITETe 122334 tvt -
Prefix: SMTPTo- Suffix: .txt	This forms the file name for the substitution	Cancel	1	File Edit Format View Help Purchasing@FormTrap.com

"billto no" is inserted between prefix and suffix to give file name: SMTPTo-122334.txt (for Customer 122334), content is the email address of the client.

Text o	TPFrom#Empl-Inits#		? 🗙		
Definition	Format Position Fort MTPTo# <u>«CustNo</u> »# MTPFrom#« <u>Empt-Inits</u> »#	Print rules			
Linked r	ecords	Link all.,	RI TJ		
Sample CustNo Empl-Ini	bilto no	1] Delete fir	nk .		
Link to	field		2 🛛 👘		
Field:	salesper[1]	• OK			
	Substitute from file	Cano	<u></u>		
Prefix: Suffix:	SMTPFrom-	This forms the file name for the substitution			
Mask a	t: Custom				
Mask:			1 5		
	ession			SMTPFrom	1-WPG.txt

Similarly, Employee Initials are used to form a file name containing the correct Email Address for SMTPFrom as shown below:

"salesper[1]" is inserted between prefix and suffix giving this as the file name: SMTPFrom WPG.txt (from WPG as sales person's initials).

Populating the required substitution files for both the client email addresses and the Klinger staff email addresses completes the exercise. Email address are simple .txt files and can be automatically transferred from other systems.

The result for Klinger is a personalized email, from their sales staff, member, produced and sent within seconds of completing the order. This provides better customer service, early detection of errors and their correction and better intercompany communications – and all **fully automatic** under FormTrap's control.

Poster Printing

FormTrap is ideal for poster printing as you can manipulate the image sizes, overlay them and produce a high quality resulting document combining text and graphics. The resulting image can be attached to other documents (for example, to emailed invoices showing specials for this month) and sent at no cost to all people receiving emailed invoices.

Similarly, direct emails to prospects can be quickly organized in-house and distributed via FormTrap given a "data file" containing their email addresses - or you could split and send similar or related materials to their last purchase.

The poster attached represents a typical PDF document, with finished size around the 850Kb mark which delivers a high quality output document, either printed or visual.

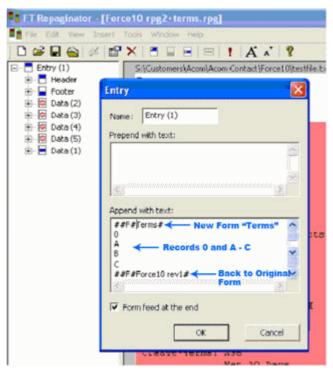
Contracts and Other Documents

This description is based on a requirement to send a contract with every PO sent to suppliers. The contract terms and conditions is in two columns and does not vary.

We used the Repaginator to append controls for a new document called "Terms" behind each PO document, then reverting to the original form for the next document, and so on.

Repaginator

This is **Append with Text** set to initiate the new form. What the controls represent is shown by the blue arrows:



Note: The **Append with Text** set must NOT be used when testing the form as these will cause the PDF creator to crash. The form can be tested individually but the entire set of forms can only be tested using the production system.

Terms Form

The "Terms" form is set up as attached. In this case the Base Page contains just the heading and footers, while EACH SIDE is set up as one Detail Record. I have shown the first Detail-A page, with the numbered terms split into two columns, and the bolded headings set up as separate objects. The first line of text for each section starts after the terms heading which is bold, and must be spaced past the heading "by eye".

	(DTerrora, Trin) na Dhan sa, Risper Tark arrange web	
	Hender Coloriancia - I Ta B B B O O O D S F F - 1 D O T H A	
Tomaria have Rooman		i.
	Printing Printing Line Printing Control on the	

This is the text for the first paragraph, with the initial spaces enough to clear the bolded heading:

	These terms and cor	nditions ("Terms")
		Þ
Link selection	Link all	
Linked records:		
Sample text	Field name	EdR link
		Delete link

You will need this as a .txt file to test the term form:

Term	ıs.txt - Notepad 🗾 🗖 🕻	×
File Edit	: Format View Help	
0 A B C		^
c		>

FTPreview Preferences Fo	Custom mask olders Data map	PostScript Re	esident Fonts Project Default:
Font usage			
 All 	Prefer True	Type Fonts	
	Always build	d fonts	
C Printer	Postscript L	evel 1	
C System			
Additional Unic	ode subranges:		
Entire Unicode	e (0 - FFFF)	Add	
		Delete	
		Desett	·
	am Files\TCGIS\FTD	esign\MICR\TCG	-SOFT.)
	am Files\TCGIS\FTD	esign\MICR\TCG	-SOFT.1
MICR: C.VProgra	am Files\TCGIS\FTD	esign\MICR\TCG	-SOFT.▶
MICR: C.VProgra	am Files\TCGIS\FTD OK	esign\MICR\TCG	-SOFT.▶

You MUST also set up this as shown in Tools, Options:

To test the entire set:

- 1. Insert the Append with text lines as above.
- 2. Build the project with Project Settings quoting the above Unicode subrange.
- 3. Load the forms into FTSpooler and test the entire set(s) there.

Quantity Masking - Whole or Decimal

This question comes up occasionally, particularly with ERP systems where the excess decimals are there to cover all bases and are rarely used by most of the FormTrap customers. This particular data file has four decimals of quantity. Most quantity data is whole numbers, with the bulk of the remainder having two or less decimals. Four decimals occurs usually where the quantity involves "1/3rd" and "2/3rd" type values where expression in decimal is recurring and the additional precision is not useful.

Rodeledsvej 70 SE-106 54 STOCKHOLM,	50 5700 SVENDBORG
SWEDEN	DENMARK
siness Partner: Description	Quantity Uni
	Quantity Uni 70.0000 ea

This example form prints the detail lines only, showing whole numbers without decimals, and decimals to their last non-zero digit (the better alternative is to round to two decimals).

This is how you do it:

1. Define three fields:

Entire field

Decimal portion only (incl. the decimal point)

Whole Number portion only

2. Make your value in the Definition Tab over 1,000 so we can align with the next field (in red in the example).

Use conditional printing to print Whole Numbers, aligned right. The Print Test is Decimal Portion Equal to (text) ".0000".

Masking for this is Amount/Numeric.

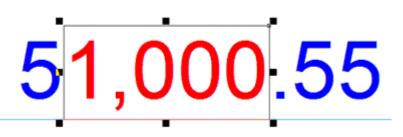
3. Make your value (Definition tab) a number that includes the same value as the above for alignment (blue in the example).

Use conditional printing to print the entire field, aligned decimal. The Print Test is Decimal Portion Not Equal to (text) ".0000".

Masking is "Custom", and comprises a field of the same length as the original, ie 14 underscores, with two trailing decimal positions masked right, thousand separator commas inserted for alignment, and the first 8 underscores masked left (this leaves "0.12 as the minimum value printed).

(Alternative is to use Amount/Numeric and define the field as "Use input separator", with two output decimals which rounds the decimal portion).

4. Finally and at high magnification, align the whole numbers on top of each other, using the arrow keys and Nudge distance of 1 for final alignment.



A PDF from the example form and data file shows below:



This question was put by Scholle Corporation who uses FormTrap globally and have policy decisions on "rationalization" of their computer outputs - such as this one.

Salutation Masking

Salutation masking from generic files with Last Name and optionally containing Title, Initials and First Name presents problems for the user, especially if the local "rules" are intended to provide the most "acceptable" salutation for the addressee.

This is the data file we'll use, it contains all of the possible variations for a total of 8 different combinations.

9	. 10	20 30	40 50
Title	Initials	Called Name	Last Name
Ms.	K	Kyle	Saunders
Ms.	K		Saunders
Ms.		Kyle	Saunders
	K	Kyle	Saunders
Ms.			Saunders
	K		Saunders
		Kyle	Saunders
			Saunders
		Т	

We'll use Conditional Processing to identify the different combinations, and to provide the "best fit" salutation from the available data. Note that unless we have no Title, the II LastName format is least preferred.

The Form Definition is attached, and the required output is shown below, with its original data. You will need to look at the Conditional Processing rules (Print Rules tab) for each of the objects, which are overlapped and shown in different colors.

	Title	Initials	Called Name	Last Name
Dear Ms. Kyle Saunders,	Ms.	K	Kyle	Saunders
Dear Ms. Saunders,	Ms.	K		Saunders
Dear Ms. Kyle Saunders,	Ms.		Kyle	Saunders
Dear Kyle Saunders,		K	Kyle	Saunders
Dear Ms. Saunders,	Ms.			Saunders
Dear K. Saunders,		K		Saunders
Dear Kyle Saunders,			Kyle	Saunders
Dear Mr. or Ms. Saunders,				Saunders

Widow/Orphan Size

The **Widow/Orphan** size element of a label can be used to check for enough room to print the trailer information on the last page. For instance, if we want the detail box to extend to the bottom of every page, except the last page where the trailer information will print at the bottom of the page.

To do this we need to have a test label. The test label is the last label called and is used to check for sufficient room at the bottom of the page for the trailer information to print. If there is not enough room, FormTrap breaks to a new page and will print any remaining information on the next page.

To do this we:

- 1. Select Add Label from the Define menu.
- 2. Give the Label a Name, Layer ID and Height.
- 3. Set the Widow/Orphan size to the size that the Totals information occupies.
- 4. Click on the **OK** button.

Writing Letters

Dunning and follow-up letters are a key part of managing your financial exposure, especially in hard times like right now. FormTrap is an effective and excellent letter writing tool, allowing a variety of letters of different tones from a very simple data file.

This is how it's done:

Data Extract from your DB

For most letters, this is all of the information you'll require, printed as a small document or as a records mode file in the Base Page record:

Company Name and Address Person being written to (or a standard title like "The Accountant") Amount outstanding Date of last action Date of next action Employee Number

In addition, you'll require these two indictors (for Records Mode make them additional one-character records):

Letter Type – indicates the text required and variables to be inserted – done in Form Design rather than here as part of the record/variable.

Closure type – allow for a signature, Name and Title only format, plus the above with an Email address. Again, done in the form design, with just an indicator/record letter here.

Form Design

There are two simple design elements, being the Base Page and the one or two Closure Detail Records. Base page contains the date and customer address and looks as below:

	بالمساءا واساليه المرابع	الرامانا		TCG In	formation Systems Pty. L
he Accountant loy	Text object			2	Ballour Street k NSW 2008
ddress 1 .ddress 2	Definition Format	Position Fort		120	803 2400 810 5172
ddress 3 ity State Zip	The Accounters (Car) (ddtess 1) (ddtess 2) (ddtess 3) (Car) (Slate) (Zi	D*			i
	Link station	1	ai.		
	Linked records:				
	Sample text	Field name	~	Editive.	
Name Title	Coy Address 1 Address 2 Address 3	coy address 1 address 2 address 3	3	Déste Ink.	
	Property 2	0000000	100		

The "Closure" Detail Lines contain just the Employee field and get their data from substitution files, where you can set up new employees without changing the FormTrap form, or even set up "dummies" for certain letter events – like the threat to pass their details to a credit agency.

This is a typical "Closure" Detail Line:

	Picture object		Picture object	
Bhai	Settings Position		Name Builder	
Name Title	F Linked Print white co ✓ Print white co ✓ Scalable Image substitution: Substitute Using	lior transparent Variable File Name	Signe <u>emplovee</u> ».bmp	Link (
Email	Build file name	✓ Fit to frame ✓ Fit to frame ✓ Keep aspect in Horizontal alignment Left Vertical alignment		Field name employee
Name Title	OK	Center Cancel	Trim leading and tra	aling spaces fro

All of the information (in the above, the signature and below, employee details), are Substitutions based on Employee, here are the text substitutions:

The Account Coy Address I Address 2	Text object Definition Format Por	ition Font		2 🛛	53 Ballour Stre ndate NSW 20 1 28003 2400 1 28003 2400 1 28003 2400	et 108
Address 3 City State Zip	« <u>Name</u> » « <u>Litle</u> »		Link to f	ield		2 🛛
BG	< <u>Emal</u> > Link selection	Lin	Field: Prefix: Suffix:	Substitute from file		OK Cancel
Name Title Email	Sample text Name Title Email	Field name employee employee employee	Mask as:		×	

The above produces the file name "**NameXXXX.txt**" with employee number replacing the XXXX. The **data** from the matching file name in the Substitutions folder is inserted. These are a few of the substitution files with an example:

🗐 Name1343.txt	1 KB T	ext
🗊 Name1441.txt 🔫 —	1 KB T	at > Name1441.txt - Notepad
Name1598.txt	1 KB T	ext
Sign1343.bmp	78 KB P	ant File Edit Format View Help
Sign1441.bmp	22 KB P	^{ant} Brian Crow
Sign1598.bmp	74 KB P	aint
Title1343.txt	1 KB T	ext Document
Title1441.txt	1 KB T	ext Document
Title1598.txt	1 KB T	ext Document

Letter Texts:

Detail line	? 🛛
Settings Advanced Records	
tuita hudun anna	
Implicit header: <none></none>	
Growing and shrinking	
Whitespace: 0.3 in	
<u> </u>	
OK Cancel H	elp

These are again just detail lines, which can incorporate data and use the special **Advanced** tab to define themselves as **Variable height** and to allow **Whitespace** after the final line.

Data from the Base page is incorporated into the letter text as are required substitutions (see **«employee**» used to substitute this person's extension number).

Dear Sir.		
* <u>Cov</u> » is approach against you. This		is P/L will be forced to take legal action for debt recovery ILLARS (\$500.00) on top of your existing debt of <u>«Amount</u> »
I would be most ap « <u>employee</u> ».	preciative if you could call me to discuss yo	ur repayment program on 02 8303 2400, extension
If I have not heard	from you or received payment in full by «20	021231», legal action will be taken.
	from you or received payment in full by <20	121231», legal action will be taken.
	from you or received payment in full by $\circ \underline{20}$	021231», legal action will be taken.
	1	<u>121231</u> », legal action will be taken.
Yours faithfully.	1	<u>121231</u> », legal action will be taken.
Yours faithfully,	1	021231», legal action will be taken.

Your Data Extract program then simply needs to provide for the correct letter type and closure to print a large variety of letters. Financial institutions can use this to direct personalized and sophisticated letters from a simple "extract" source to provide letters that look individually written and can direct their replies to a person or function within the company.

This document is available (Version 7) with appropriate substitutions and data file from Downloads, Tutorials.

Samples follow:

May 1, 2009	FormTrap.
hiblablablablablablablablablablablablablab	TCG Information Systems Pty. Ltd. Level 3, 53 Baifour Street Chippendale NSW 2008 Tel: +612 4933 2400 Fax: +613 9370 5172
Dear Sir,	
Dullard and Slow, Inc. is approaching the point where TC take legal action for debt recovery against you. This will HUNDRED DOLLARS (\$500.00) on top of your existin ONLY (\$3,000.00), as well as time, travel and loss of rep	cost Dullard and Slow, Inc. at least FIVE g debt of THREE THOUSAND DOLLARS
I would be most appreciative if you could call me to discu extension 139.	uss your repayment program on 02 8303 2400,
If I have not heard from you or received payment in full I	by May 31, 2009, legal action will be taken.
Yours faithfully,	
RAM Mastriam	
Bruce M. Matheson	
Credit Manager, AR	
Bruce.Matheson@FormTrap.com	







TCG Information Systems Pty. Ltd. Level 3, 53 Balfour Street Orippendale NSW 2008 Tel: +61 2 8032 2400 Fax: +61 2 8310 5/72

May 1, 2009

The Accountant Trans Tasman Railway Company 53 Balfour Street Chippendale NSW

Dear Sir,

TCG Information Systems P/L has handed your debt to a debt collection agency and will deal with Trans Tasman Railway Company only on a cash with order basis.

Trans Tasman Railway Company has been included on a number of data bases used by credit controllers to vet companies prior to the issuance of credit facilities.

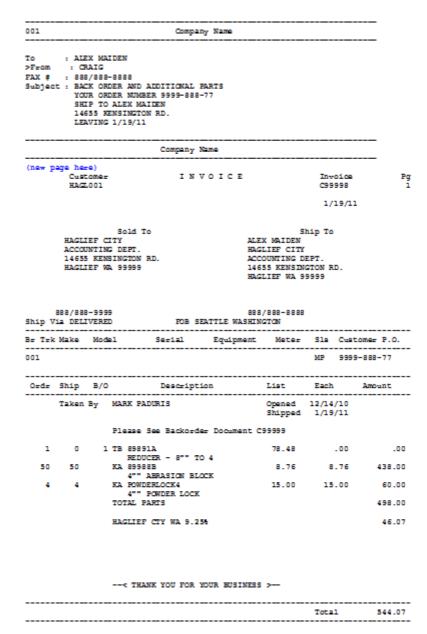
Yours faithfully,

GA Hulfer

Geraldine A. Hungerford Credit Supervisor

Fax from your ERP System

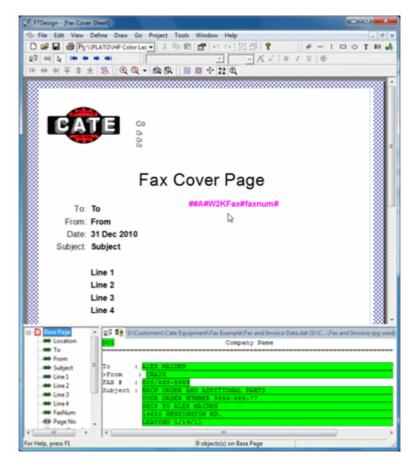
Most Unix ERP systems have methods to present faxes as the normal document, with preceding cover page. In the NDS ERP system, this appears as shown below (Invoice with preceding fax cover sheet).



From this output we require the normal invoice but with it's preceding cover sheet, in the same file, for conversion to TIFF format and faxing. For this case, we'll create a Cover Sheet Form, with company substitutions operating in exactly the same way, based on the Location. This is how it is done, identifying the points at which changes are required to your FormTrap processing.

New Fax Cover Sheet Form

This form is a simple one, comprising Base Page fields only, with the "WK2Fax" associated File line to direct the output fax. This is how it's defined (see later for the print version).



Repagination for the Fax Form

This needs to be added to the normal repagination, in this case the Invoice Form. This is how it's done:

1. Load the Invoice repagination, but with the Fax plus Invoice data. It will be "out of whack" on the first page and you'll need to move the Header and Detail portions

down as shown to repaginate correctly.

	the second s	A REAL PROPERTY AND A		
Insert Tools Window Help				
XINGERMINA	* *		_	
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2. (After moving all other areas down), add a new entry (Insert, Entry ...), and define the entire Fax as the header. Now go to Edit, Order of entries ... and move Entry (2) to Highest.

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3. For Entry (2), select **Properties ...** and replace **Append with text:** with this line: ##F#formname# - this starts a new form once the first form has finished, in this

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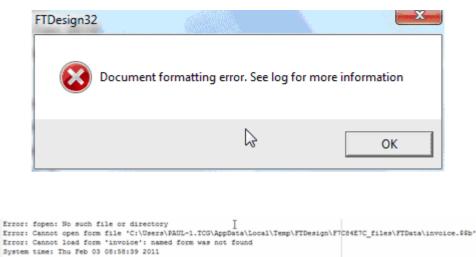
case enter ##F#INVOICE#. Tick Form feed at the end.

4. Finally test the Repaginator, where output should look like this:

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Testing the Fax Form

When running **Tools**, **Preview (b&w)** you will get this message from FTDesign indicating the INVOICE form definition cannot be found.



Error: FormTrap error code 5: named form was not found

However you can view the Fax form via Tools, Preview files and look at out.

This is the final output from FormTrap run through the Production System:



Production System Changes

You will initially need to split to a Fax queue (as individual documents as each requires it's individual delivery) in which you then identify by the following document type and invoke the correct version of the Fax form with different repagination for each of their associated documents. The best way is to repeat the fax form with different repaginations and name them (eg Fax-Invoice form). Do this for all faxed documents, in the same queue. For these forms and example data files, etc., please download by clicking here.