



Document Enhancement & Distribution Solution

# **Tax Template User Guide**

Document Version 3.0

### **Table of Contents**

Tax Form Specifications	3
Merging the Template and Process	5
Importing a Template	5
Importing a Sample .lis File	6
Process Specific Instructions	7
W2	7
1099MISC	7
1098T	7
Optional Email Component	8
Creating a FormDirector	8
Editing FormDirector Properties	9
FormFusion Basics	11
Selecting objects	11
Moving objects (text boxes, data fields, etc.) around on the form	11
Changing fonts	11
Aligning objects	12
Unlocking an object	12
Troubleshooting	13
Tax forms not printing OR strange characters appear in the .lis file	13
Data in .lis file but not printing correctly	13
Reprint a partial job	14
Template is set to archive output, but the .pdf file was not archived	14
Template is set to archive, but cannot view archived files	15
User cannot log in to the FormFusion Archiver	15
Extra spaces between names on W2	15
Technical Support	16
Registering with the HelpDesk	16
Uploading files to HelpDesk Ticket	16

## **Tax Form Specifications**

**Important**: Evisions has provided the following 2011 tax templates developed with **Banner version 8.6.1**, which was the latest version available on **December 16, 2011** and with tax forms provided by National Document Solutions (NDS). They are intended as a **starting point** and may need to be adjusted slightly, as all environments, printers, and forms vary.

IRS Tax Form	Banner Process	Special Print Parameter	NDS Form Number	Description	Horizontal Perforations	Vertical Perforations
W2	PXRW211	W2_4DWNPERF_2011	4DWNPERF05	Size: 8.5x11 Type: Laser Forms: 4-up Horizontal Front: Blank Back: Pre-printed Instructions Envelope: 4356	2 ¾" 5 ½" 8 ¼"	N/A
W2	PXRW211	W2_4UPPERFI_2011	4UPPERFI05	Size: 8.5x11 Type: Laser Forms: 4-up Corner Front: Blank Back: Pre-printed Instructions Envelope: 4UPDWENV05 Envelope for Inserts: 4UPALT9	5 ½"	4 1/4"
W2	PXRW211	W2_80640_2011	80640	Size: 8.5x14  Type: Pressure Seal, Z-Fold  Forms: 4-up Corner  Front: Blank Back: Pre-printed Instructions	5 ¼" 10 ½"	½" 4 ¼" 8"
W2	PXRW211	W2_80642_2011	80642	Size: 8.5x14 Type: Pressure Seal, Z-Fold Forms: 4-up Horizontal Front: Blank Back: Pre-printed Instructions	2 <sup>3</sup> ⁄ <sub>4</sub> " 5 <sup>1</sup> ⁄ <sub>4</sub> " 7 <sup>3</sup> ⁄ <sub>4</sub> " 10 <sup>1</sup> ⁄ <sub>2</sub> "	½" 8"
1099-Misc	fab1099	1099M_80487_2011	80487	Size: 8.5x11 Type: Pressure Seal Forms: 3-up Horizontal Front: Pre-printed Back: Pre-printed Instructions	3 11/16 <sup>-</sup> 7 5/16"	½" 8"
1099-Misc	fab1099	1099M_BMISFED_2011	BMISFED05	Size: 8.5x11 Type: Laser Forms: 2-up Horizontal Front: Pre-printed Back: Blank	5 ½"	8"
1099-Misc	fab1099	1099M_LMISCPSB_2011	LMISCPSB	Size: 8.5x11 Type: Pressure Seal Forms: 3-up Horizontal Front: Blank Back: Pre-printed Instructions	3 11/16" 7 5/16"	½" 8"

IRS Tax Form	Banner Process	Special Print Parameter	NDS Form Number	Description	Horizontal Perforations	Vertical Perforations
1099-Misc	fab1099	1099M_WONEPERFMI_20 11	WONEPERFMI	Size: 8.5x11 Type: Laser Forms: 2-up Horizontal Front: Blank Back: Pre-printed Instructions Envelope: RDWENV05 Note: If using a high speed inserter, contact your stock provider.	5 ½"	N/A
1099-R	pxr1099	1099R_LR4UPB_2011	LR4UPB or 80728	Size: 8.5x11 Type: Laser Forms: 4-up Corner Front: Blank Back: Pre-printed Instructions Envelope: 4UPDWENV05 or R4UPDWENV05	5 ½"	4 1/4"
1099-R	pxr1099	1099R_MW1159_2011	MW1159	Size: 8.5x11 Type: Pressure Seal Forms: 4-up Corner Front: Blank Back: Pre-printed Instructions Note: Requires duplex printing for addresses on back	½" 5 ½" 10 ½"	½" 4 ¼" 8"
1098-T	tsr1098	1098T_B99PERF_2011	B99PERF05	Size: 8.5x11 Type: Laser Forms: 3-up Horizontal Front: Blank Back: Blank Note: Does not require duplex printing instructions will print on front Envelope: 99DWENV05	3 5/8" 7 5/16"	8"
1098-T	tsr1098	1098T_Z0800_2011	Z0800	Size: 8.5x11 Type: Pressure Seal Forms: 3-up Horizontal Front: Blank Back: Blank Note: Does not require duplex printing - instructions will print on front	1½" 3 11/16" 4 1/16" 6 7/8" 7 3/8" 7 7/8"	½" 8"
1042-S	pxr1042	1042S_MW1242_2011	MW1242-11	Size: 8.5x14 Type: Pressure Seal Forms: 4-up Horizontal Front: Pre-printed Back: Pre-printed Instructions	3 ½" 5 ¼" 6 7/8" 10 ½"	½" 8"
1042-S	pxr1042	1042S_L1042S_2011	1042SFED05, 1042SB05, 1042SC05, 1042SD05, 1042SE05,	Size: 8.5x11 Type: Laser Forms: 2-up Horizontal Front: Pre-printed Back: Pre-printed Envelope: 42SSWENV05	5 ½"	8"

If you will be purchasing forms from a different vendor, ensure their stock is compatible with the specific template specifications above. You may easily modify templates to be compatible with other vendor's stock; however you'll need to make sure that they meet the IRS specifications. Information on how to modify templates can be found in the FormFusion Basics section. If you have any questions, contact our HelpDesk at: <a href="http://helpdesk.evisions.com/">http://helpdesk.evisions.com/</a>.

**NOTE:** Support for custom modifications is available from Evisions, Inc. at an additional cost.

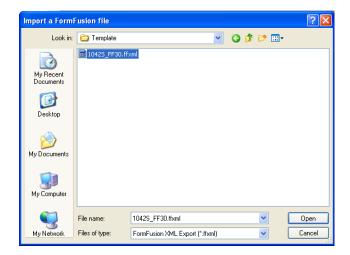
## **Merging the Template and Process**

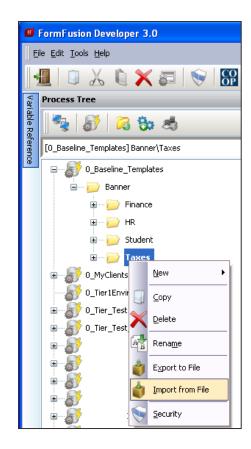
#### **Importing a Template**

Download tax templates file from the Evisions Tax Center located: <a href="http://evisions.com/Support/TaxCenter.aspx">http://evisions.com/Support/TaxCenter.aspx</a> and save to a location of your choosing. The filename will have an .ffe (FormFusion 1.9) or an .ffxml (FormFusion 3.0) extension. Launch FormFusion and import the file.

In this example, we have created a new folder called **Taxes**. To create a folder, select an environment or existing folder and click the **New Folder** icon. After naming the folder, right click on it and choose **Import from File**.

In the file browser, navigate to the location of the template downloaded from the Co-Op Share and select the template. Click **Open**. The imported template will be placed in the new folder.





**IMPORTANT NOTE:** If you download a template for testing, please be sure to check the Tax Center for template updates, before running the process/template in Production.

Notification of tax template updates will be posted on the Tax Center and on the FormFusion Forum: <a href="http://www.evisions.com/Support/COOPUserCommunity/Forums.aspx">http://www.evisions.com/Support/COOPUserCommunity/Forums.aspx</a>

#### Importing a Sample .lis File

\*\*\* NOTE: Please ensure that you test your template thoroughly. We recommend that you import the latest sample .lis file from your environment into MapForm. We base our templates off of the Banner baseline process .lis files, and different versions of the Banner process may position the information in the .lis file in different locations. In this case, minor mapping adjustments may be necessary in MapForm. \*\*\*

Note: the .lis files are saved on the Banner server, so you may need the assistance of your IT department.

To load a sample .lis file into MapForm, first double-click on 'MapForm' in the Process Tree for the corresponding FormFusion Special Print Parameter.

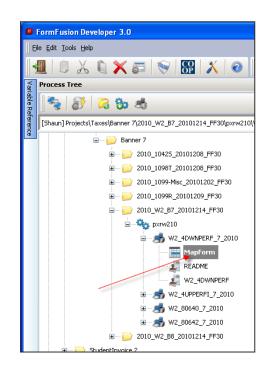
With MapForm loaded, click the 'Fetch a sample output file' button on the toolbar.

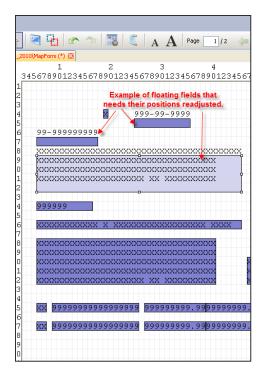


In FormFusion 1.9, the 'Fetch a sample output file' button looks like this:



Verify that all of the fields have been properly mapped. If any of the data in MapForm is not correctly mapped, readjust the position of the floating fields (purple boxes) so that they correctly map the appropriate text.





#### **Process Specific Instructions**

#### **W2**

In the Banner GJAJOBS form, change the type from **Procedure** to **PRO\*C** for the PXRW211 process.

When running the PXRW211 process, make sure that the printer output parameter is as follows (no matter what type of printer you are using):

**PXRW211** Parameter 07 - W2 Format = 1 for Standard IRS 1-up

#### 1099MISC

When running the FAB1099 process, make sure that the printer output parameter is as follows (no matter what type of printer you are using):

**FAB1099** Parameter 01 - Printer Type = 1 for Dot Matrix

#### 1098T

When running the TSR1098 process, make sure that the printer output parameter is as follows (no matter what type of printer you are using):

**TSR1098** Parameter 04 - Printer Type = 1 for Dot Matrix

## **Optional Email Component**

If your institution is licensed for the FormFusion e-mail module, you can e-mail PDF attachments of the output to individual recipients. You can also e-mail a copy of the entire batch to yourself as a PDF for simple, easy reprints at a later date.

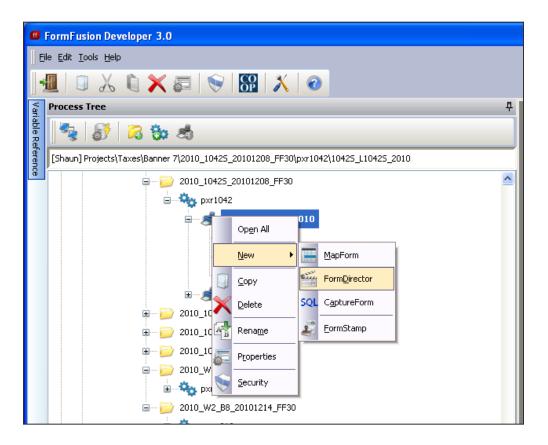
**NOTE:** For TSR1098 and PXRW211, the output will be very large and your e-mail system might reject the output. The conversion of PCL to PDF is also very time consuming for large files. Therefore, if you plan on using this method to 'archive' your files, you might want to run the process twice - once to print the output, then a second time to e-mail, doing the e-mail during off-peak hours.

#### **Creating a FormDirector**

In FormFusion, the FormDirector module is used to direct all output, including email.

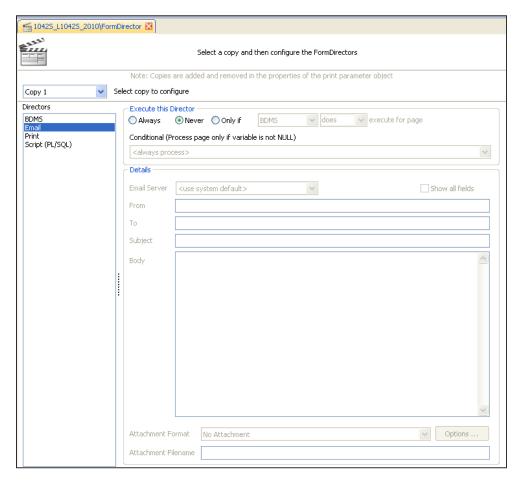
Select the Special Print Parameter (SPP) you want to create a FormDirector beneath, right-click and select **New -> FormDirector**.

The FormDirector icon (Director Clipboard image) should appear under the Special Print Parameter.



#### **Editing FormDirector Properties**

To edit FormDirector properties, double-click on the FormDirector icon. The **FormDirector Properties** dialog box will appear. In this dialog, the copies that are available to modify are displayed in the **Copy** dropdown list. Select the copy you want to edit, then select the **Email** Director.



In the Execute this Director section, you can specify how often and on what condition you want to execute the email.

Fields and descriptions of the **Details** section are as follows:

To: Direct recipients of the email. Use commas to separate multiple recipients.

**From:** The address that will be replied to if a recipient chooses to reply to the email. Also controls the name that is displayed as the originator of the email.

**CC:** The recipients that should receive a copy of the email. Use commas to separate multiple recipients.

**BCC:** The recipients that should receive a copy, but should not be displayed as a recipient in the email. Use commas to separate multiple recipients.

**Subject:** The subject header of the email.

**Return Receipt:** Specify the email address that will request a return receipt when the recipient(s) read the email. *Not all email applications support this feature.* 

Body: Click this button to display a message editor in which you can type any additional text that should be emailed.

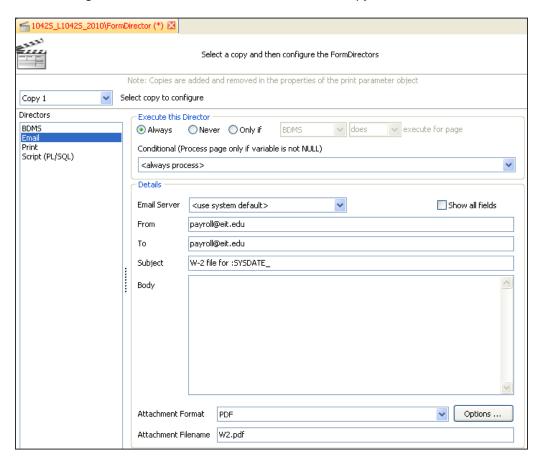
Please note: this is a text editor. You cannot add images. If you need to add a link to the email body, please add a '\' before the colon as follows: http\://www.evisions.com

Attachment format: How the processed report output file will be attached to the email. The drop-down menu options include:

- Unformatted (original text)
- No attachment (just the email body will be sent)
- PDF (converted PDF version)
- Unformatted in body (will be appended to the end of the body rather than as an attachment)

**Filename of Attachment:** The name of the attachment as it will be stored in the email. If this field is left blank, a default name will be used (FormFusion.XXX where XXX is the file extension of the attachment format selected).

The following shows how the form would be filled out if Copy 1 is to be ALWAYS emailed to the Payroll Office:



Note that on the subject line we are using the FormFusion variable: SYSDATE\_. When you need to reference a FormFusion variable anywhere in FormFusion, you must add a colon in front of the variable. This applies to any predefined or system variables.

Any variables defined previously in the program, such as in MapForm or CaptureForm, can be used in the email fields.

## **FormFusion Basics**

If you are new to FormFusion, or would like a refresher course on using the FormFusion tools to help you print your tax templates, please take advantage of the recorded tutorials we offer at: <a href="http://www.evisions.com/Services/Training.aspx">http://www.evisions.com/Services/Training.aspx</a>

If you would like more information, the full FormFusion User Guide can be referenced at: <a href="http://www.evisions.com/Default.aspx?tabid=67&id=722">http://www.evisions.com/Default.aspx?tabid=67&id=722</a>

#### **Selecting objects**

#### Select a single object

Place your mouse above the object and click the left button on your mouse.

#### Select multiple objects

Select the first object, hold down the SHIFT key on your keyboard, then use your left mouse button to select all the other objects.

#### FormFusion does not select the correct object

Some objects can be very close together, making it difficult to select the object you want. You can send unwanted object(s) to the back by right-clicking on the unwanted object and choosing the **Send to Back** option. You will now be able to select the object that remains in front.

### Moving objects (text boxes, data fields, etc.) around on the form

Drag and drop the object to its new location

OR

Select the object, hold down the CTRL key on your keyboard, then use the arrow keys to move the object in small increments.

### Changing fonts

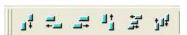
Select your object(s), right-click and select the Format Object option. Choose the font and font size you want.

Hint: If you want to change the font and/or size of multiple objects at the same time, use the multiple select method, right-click one of the objects, and select the **Format Objects** option.

#### Aligning objects

Left justifying or right justifying objects can be a daunting task. FormFusion provides you with several alignment tools to simplify the task. Alignment tools are grayed out until multiple objects are selected.

First, select the object you want all your objects to line up with. Hold down the SHIFT key on your keyboard, then select all your other objects. Once all the objects are selected, go to the tool bar and click on the appropriate alignment button.



FormFusion 1.9



FormFusion 3.0

### Unlocking an object

If an object you are trying to reposition snaps back to the original position, the object is locked into place.

Select the object you want to move and look at the tool bar. If the **PadLock** button is depressed or grayed, the object is locked.

You can easily unlock the object by clicking on the **PadLock** button. Once the object is unlocked, you can continue on with your task.



FormFusion 1.9



FormFusion 3.0

## **Troubleshooting**

Please review this section to verify all steps have been completed properly, before submitting a HelpDesk ticket.

Note: You will find a README form inside each of the tax templates you download from our website. Please be sure to read it and verify all instructions have been followed.

#### Tax forms not printing OR strange characters appear in the .lis file

If the tax form is not printing at all or you have strange characters in the .lis file, verify that all of the steps below have been followed:

 Be certain the Special Print Parameter (SPP) on the Banner Job Submission form is spelled exactly like the SPP name in FormFusion.

Check the .log file for:

The process name "your process (using SPP "\*\*\*"); is not a FormFusion controlled process. Sending "your .lis file" through normal print command.

If you find this text, you didn't include the SPP name or you entered it incorrectly. Open up the template in FormFusion then use the name next to the printer icon as your SPP.

- Verify that your database is set up to run FormFusion if you are not sure and already have other Banner processes
  running through FormFusion, test one of those processes against the same database.
- Run the template exactly like it is on the website, without a new FormDirector or any other modifications. Once tested, you can make modifications as needed.

### Data in .lis file but not printing correctly

If there is data in the .lis file, but none or only part of the data is printing, check the following settings:

- In SPP Properties, Input File Settings tab in FormFusion, make sure the Special First Pages Instruction and the Special Last Pages Instruction are set correctly for your .lis file.
- Check that the Pages separated by pagebreak (^L) characters option is set correctly for the process as follows:

1042S – Checked 1098T – Not checked 1099MISC – Not Checked 1099R – Checked W2 – Not Checked

Search the .lis file coming directly out of Banner for the missing data.

If the .lis file DOES contain this data, then import the .lis file into MapForm to see if the mapping is misaligned. Page 6 of the Tax Template Instructions shows how to verify the mapping of the data:

http://www.evisions.com/LinkClick.aspx?fileticket=v7nbtQZkvZU%3d&tabid=264

If the .lis file DOES NOT contain this data, contact SGHE to determine why this information is missing from your baseline Banner output file.

#### Reprint a partial job

Make a copy of the .lis file. While the lis file is open in an application that can display the new page character (ex. Notepad++, VIM etc.), remove all the records already processed from the copied .lis file including the new line character that follows.

Here are couple examples of what a new page character would look like:

^L05-0CT-2010 02:46:14 PM

^L marks the beginning of a new page

FF20-OCT-2010 10:00:32 AM

FF marks the beginning of a new page

Verify you correctly updated the copy .lis file by importing it into MapForm of the template. Once imported into MapForm, scroll through the pages in the .lis file. Does the first line of the copy .lis file open up in the same position as the original .lis file in MapForm? Is the first character of the first line in the copy lis file in the same position as the original lis file? If both answers are yes, you are ready to move on.

If you do not have access to the Banner server, please work with your Banner server folks to rerun the job via the command line using an existing .lis file. This method allows you to rerun a process as many time as you like without Banner with an existing .lis file as your input. You will need to either provide a full path to the .lis file in the script, or run the script from the directory where the .lis file is located.

Download the reprint script:

http://www.evisions.com/Default.aspx?tabid=67&id=661

Please update the reprint script for your Banner server OS with the parameters specific to your environment. If you are running FormFusion 3.0, you will need to update the reprint script to exclude the –eviuser, the-evipass flag and its parameters, add the evicfg call, and change the –evilis flag to a –eviinput.

### Template is set to archive output, but the .pdf file was not archived

Look at the process log file for any errors. If there is an error, review this troubleshooting Guide to find an answer. If no solution can be found, please submit a Helpdesk Ticket.

If there are no errors, verify whether the archived file is saved to the database. Please have your DBA query the EVIARCHV table owned by the evisions user.

**SELECT** \*

**FROM** EVIARCHV

WHERE eviarchy lisname = 'YOUR LIS FILE NAME'

AND eviarchv\_spp = 'YOUR\_SpecialPrintParameter'

#### Template is set to archive, but cannot view archived files

There are no errors in the process log file, but the user does not see the archived files in the FormFusion Archiver.

Verify whether the archived files are saved to the database. Please have your DBA query the EVIARCHV table owned by the evisions user.

SELECT \*
FROM EVIARCHV
WHERE eviarchv\_lisname = 'YOUR\_LIS\_FILE\_NAME'
AND eviarchv\_spp = 'YOUR\_SpecialPrintParameter'

If the record is in the EVIARCHV table, have the FormFusion Administrator launch FormFusion, go to **Tools**>**FormFusion Archiver**, and log in to the correct instance. Once logged in to the FormFusion Archiver, log in to the correct database instance again, and select the **Process Name** from the drop-down menu. Does your user who is trying to view the archived files have privileges to view the archived files? If not, grant the proper permissions.

#### User cannot log in to the FormFusion Archiver

Have the FormFusion Administrator go to **Tools->Administration Wizard**. Make sure the correct database instance is selected from the database drop-down menu, then click the **Security** button. Log in, then select the FormFusion **Archiver Security Object** from the drop-down menu. Verify whether the user's username is under the Member's list. If not, drag and drop the user from the non-members list and give him/her a ban\_default\_M role.

### Extra spaces between names on W2

The W2 process, pxrw2xx may print extra spaces between the first and last names of the employee name in the .lis file.

For example, it will print "John H Doe". To resolve this issue, please refer to the following link: <a href="http://www.evisions.com/Default.aspx?tabid=67&id=718">http://www.evisions.com/Default.aspx?tabid=67&id=718</a>

## **Technical Support**

If you have not found your solution in the Troubleshooting Section, please <u>submit a Helpdesk ticket</u> with the following information:

- Detailed description of the issue
- The process .log file. Run the process again with the -evidebug flag in the special print parameter, then provide us with this log file. The log file can be found on your Banner server, typically in the jobsub directory.

To run the process with the -evidebug file, do the following:

If you enter for the special print parameter SPP

• The FormFusion template, even if no changes were made since the download. This will help us to identify whether the issue is only for your template or not.

Export the template from FormFusion. Log in to FormFusion, then go to the template. Right-click on the process or a folder above it, then choose **Export**.

Please specify which special print parameter the user entered when they ran the job.

- Sample .lis file
- Screenshot or fax of the output (if applicable)

Email: helpdesk@evisions.com

Fax: (714) 730-2524

### Registering with the HelpDesk

If you do not have access to the HelpDesk, you will need to contact your Institution's Support Site Administrator. If you are unsure who your administrator is, please contact the HelpDesk at: **(714) 824-5252 option 2**.

### **Uploading files to HelpDesk Ticket**

Once your ticket has been submitted, you can upload supporting files to it. From the HelpDesk, click "View submitted requests". Open the ticket, scroll to the bottom and click "Choose file". Select the file, and then click "Upload". Your file will appear in the Ticket Attachments section of the ticket.