



FormFusion Suite

Your Intro to any Process...Building a Purchase Order

The following is a brief guide to how the sample purchase order **PO_SIMPLE** was created. We discuss how to: (1) **search for keywords**, (2) **capture a field offset from the search term**, (3) **delete data**, (4) **print different overlays on different copies**, and (5) **split the print job between different networked printers/bins**. Refer to APPENDIX A for before and after images.

Decisions made by the client:

1. The client did not want the Additional Amount, Discount Amount or Total Taxes fields to print. These fields would always be \$0.00. This is accomplished with the use of offset fields in MapForm (as described in more detail below).
2. The client also decided that there was a need for 3 printed copies – the first copy was for the vendor and would be printed on special blue paper. The other 2 copies were for internal departments (Receiving and Accounts Payable) and could be printed on standard paper. This is done by setting the properties of the Special Print Parameter and by setting the print option on the pcl form itself.

Getting Started:

Beginning the design process, it is helpful to import a template that closely matches what you are working towards. By simply importing/opening your sample template (in this case the po_simple.ffe) you will be able to see what we did to meet the clients needs and be able to make your own modifications. Please refer to APPENDIX B to see the details on how we got to this point.

1. Using Offset fields in Mapform

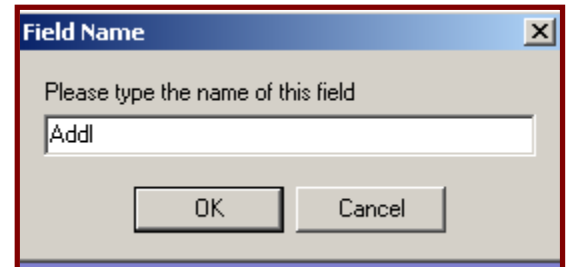
The first step in creating any template typically is to create the MapForm. The use of MapForm is straightforward. First, you need to add a MapForm node beneath a Special Print Parameter. Once you have added the node, you can open it and import a "sample print file" from the process you are enhancing. This sample print file should be in the format that the process would normally produce. Once imported, each page will be shown one page at a time. You are free to navigate through the pages as necessary. Use your mouse and draw areas (called "floating fields") on the normal printed page. Name each field appropriately to denote what information will normally appear at that location. (See **Help: Working with MapForm** for additional help)

For this sample, we pulled in a listing from the FPAPORD process. When pulling in a list file, you will be prompted for some default settings (Number of rows, columns and if a ^L will be used for a page break or not. FormFusion helps you make these decisions by calculating values on what it finds on the first page. You may always change these defaults at a later date, (see **HELP: Special Print Parameter: Input file settings** for more information).

By using MapForm the fields were marked and identified with appropriate names. We will discuss how the Offset feature was used to handle the special fields Additional Amount, Total Taxes and Discount Amount.

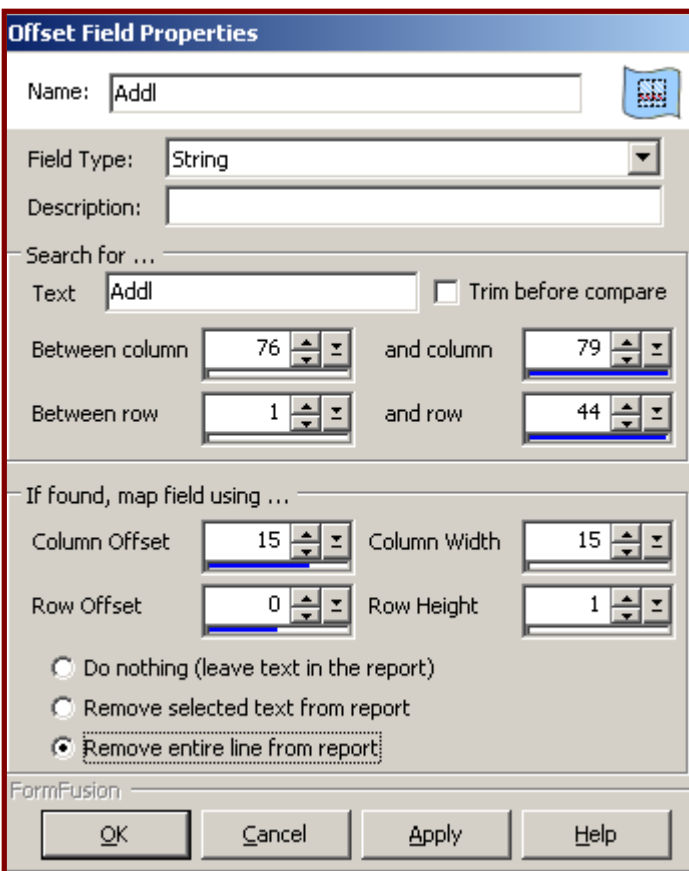


This is the **Draw Offset Field** tool button. Click this tool button to create an offset field on the form. You will first be prompted to enter a variable name. Enter the name you want to associate with this field and click “OK.”



A dialog box titled "Field Name" with a close button (X) in the top right corner. The text inside says "Please type the name of this field". Below this is a text input field containing the text "Addl". At the bottom of the dialog are two buttons: "OK" and "Cancel".

The Offset field properties form will then be displayed. On this form you will enter the word or set of characters you are searching for and where on the page this string could be found. Finally, if found, where is the data that you want to map. For the Additional amount field, we will search for the characters “ADDL” between columns 76 and 79 and rows 1 to 44. If the search text is found, the data we are interested in is 15 columns to the left of the first character of the string being searched for (i.e. starting in column 90) and is 15 characters long. The next decision is what to do with the text if found. Again, in this example, we do not want to print the words “Additional Amount” so we will remove the entire line from the report.



A dialog box titled "Offset Field Properties" with a close button (X) in the top right corner. It contains several sections:

- Name:** A text input field containing "Addl".
- Field Type:** A dropdown menu set to "String".
- Description:** An empty text input field.
- Search for ...**
 - Text:** A text input field containing "Addl".
 - Trim before compare
- Between column:** Two spinners, the first set to "76" and the second to "79".
- Between row:** Two spinners, the first set to "1" and the second to "44".
- If found, map field using ...**
 - Column Offset:** A spinner set to "15".
 - Column Width:** A spinner set to "15".
 - Row Offset:** A spinner set to "0".
 - Row Height:** A spinner set to "1".
- Three radio buttons:
 - Do nothing (leave text in the report)
 - Remove selected text from report
 - Remove entire line from report

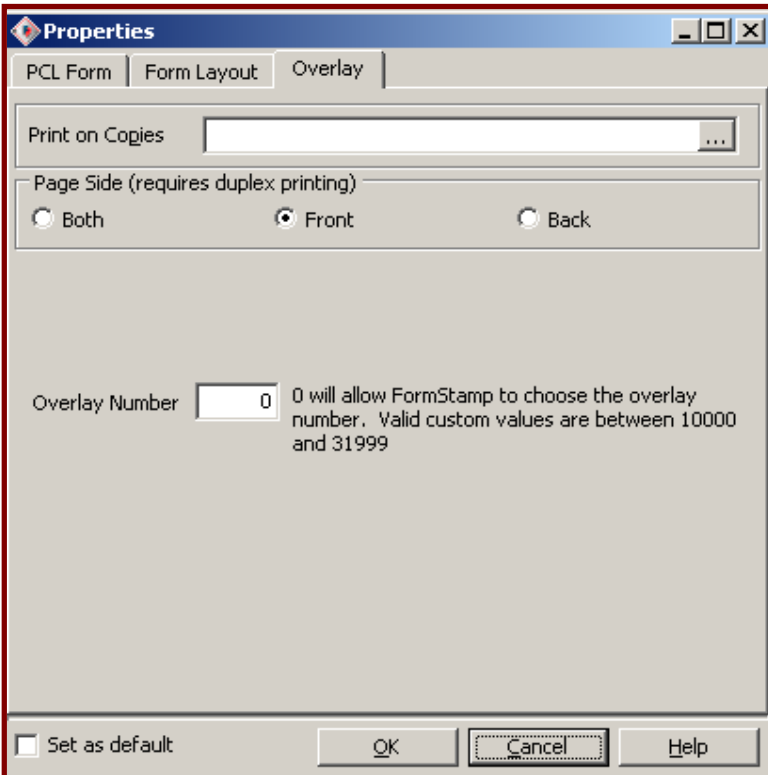
At the bottom, there are four buttons: "OK", "Cancel", "Apply", and "Help".

Note that although the entire line is going to be removed from the report, the data that has been mapped is still available to be placed on the form if desired.

For more information on using the Offset field, please refer to the **Help: Offset Field Properties**

2. Copies

The designing of the template named **PO** was pretty straightforward. FormFusion PCL Form is basically a "digital template" which you can overlay onto any output stream from a process run on your Banner system. The **PO** template or form contains all the design elements that will be printed on all copies of the purchase order.



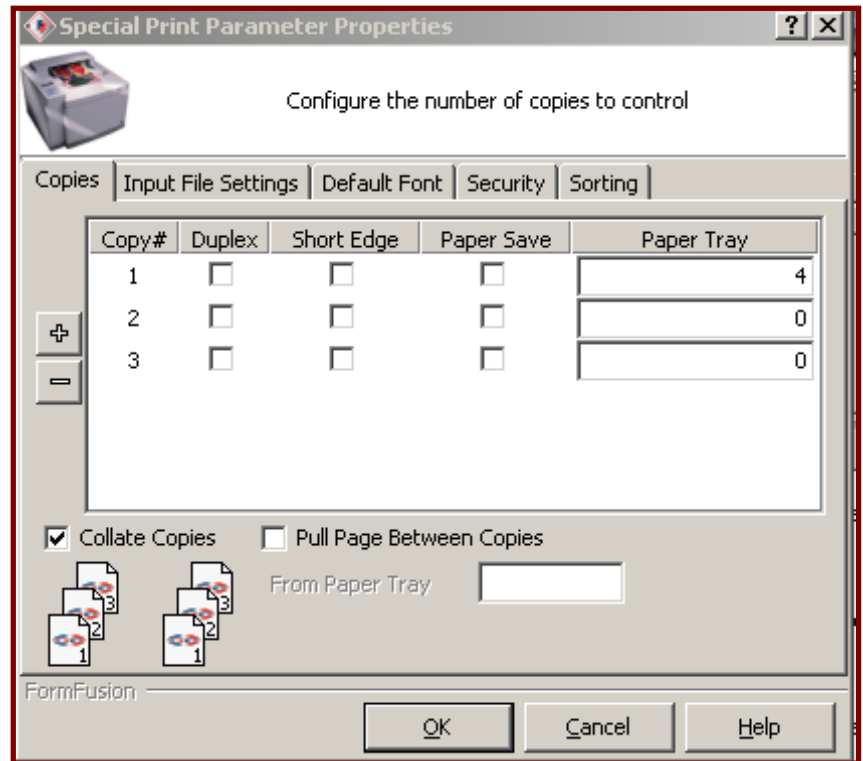
Every form also has what we refer to as **Form Properties**. To edit the form properties, open the form you wish to edit. On the "Tools" menu, click "PCL Form Options". On the **PCL Form** tab in the "Form Properties" Dialog you can edit the form name, author name, manager name, company name and any comments about the form. These fields are for internal management and are not used by FormFusion in any way. On the Form Layout tab you can set such things as the paper size and the resolution to print the document. See **HELP: Form Properties** for more information on these tabs.

The **Overlay** Tab is where you indicate on what copy to print a particular form and if it should print on the front or back or both sides. In the **Print on Copies** field you can enter the copy (or copies) the form will be printed on. For example, if you want a form

to print on copies 1 and 3, enter "1, 3" (no quotes). To print on copies 2, 3 and 4, enter "2-4". When a copy number is not specified, the form will print on all copies. If a form is being modified or is not currently needed and should not be printed on any form, you can specify copy 0. This will cause it to never print. For the PCL form named PO, this value was left blank. For the PCL Form named VENDOR, the value of 1 was entered. A value of 2 was used for the Receiving copy and a value of 3 for the AP copy. For all, the Front radio button was clicked. Note if we wanted to print something on the back of copy 1 (such as Terms) we would place a 1 on the **Print On Copies** and check the Back radio button.

Although PO_SIMPLE does not have watermarks, many clients will create an overlay in a large shaded font saying "Vendor," "File," "Department," etc. They will then specify over which page this text is supposed to print. This is a very simple way to clearly distinguish which copy is which, when it's all printed on inexpensive blank paper.

The next step to set up the printing of three copies is to set the “properties” of the Special Print Parameter itself. To alter the properties, highlight the Special Print Parameter (PO_Simple in this example) and right click. Select “Properties” from the displayed menu. We are interested in the **Copies** tab. You can find information on the other tabs by looking in the **Help: Special Print Parameter Properties**. The **Copies** controls the number of copies and the rendering of each copy on the printed page. The copies to process are listed in the large list in the center of the dialog. The first copy to process is listed at the top and the last copy to process is listed at the bottom. To add a new copy to the list, click the "Add Copy" button.



This will add a copy with the default properties at the bottom of the list. To remove a copy, click the "Remove Copy" button. This will remove the bottom copy. Because we wanted to print the first copy (the copy going to the vendor) on special paper, we indicate the paper tray where the paper will be pulled from. This value differs from printer to printer and may not correspond to the physical paper tray number stamped on the printer itself. For more information on determining what value should be entered here, please refer to the **HELP: Special Print Parameter Copies**. Note that all other copies will be pulled from the default tray.

Please consult with your technical contact, if you would like further details on any part of this document.



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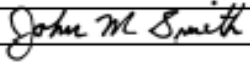
Appendix A: Before and After

		P0000015 Page 2	
		07/07/93	
300000020			
ARCO Manufacturing Co., Inc.		222 EAST ST.	
123 Main		EAST CAMPUS	
Anytown PA 19341		COLLEGETOWN PA 19341	
		07/09/93	
Net 30 Days	John Smith		
FOB Shipping Point 222 Hall	CF MotorFreight		
7	3200000000		
	Supplies, Classroom this is a long description as	10.00 EA	10.0000 100.00
8	3210000000		
	Markers, Whiteboard	10.00 BOX	3.0000 30.00
		DISCOUNT:	.00
		ADDL CHARGES:	.00
		TOTAL TAXES:	.00
			631.00

Figure 1 Before - Baseline Banner Output

Added Logo

Different Fonts

 Evisions Institute of Technology <small>www.evisions.com 949.833.9993</small>		PURCHASE ORDER Number: P0000015 Please show this number on all packages and documents related to this order Page 2 Date: 07/07/93		
Purchasing Department 18818 Teller Ave. Irvine, CA 92612 Voice: (888) 533-5993 Fax: (949) 833-0327		Vendor: 300000020 AFCO Manufacturing Co., Inc. 123 Main Arrytown PA 19341		
Ship To: 222 EAST ST. EAST CAMPUS COLLEGETOWN PA 19341		Invoice in Triplicate to: Accounts Payable, Evisions Institute of Technology, Irvine, CA 92612 <u>Do not back order without permission.</u> Address all correspondence to the Purchasing Department		
PLEASE ACKNOWLEDGE RECEIPT OF THIS ORDER AND GIVE DEFINITE DELIVERY DATE				
Item	Item Description	Units	Unit Price	Extended Price
7	3200000000 Supplies, Classroom this is a long description as	10.00 EA	10.0000	100.00
8	3210000000 Markers, Whiteboard	10.00 BOX	3.0000	30.00
FOB: Net 30 Days			TOTAL: 631.00	
TERMS: FOB Shipping Point 222 Hall				
PURCHASING AGENT: John Smith				
DELIVER BY: 07/09/93				
<small> CHANGES: No alteration in any of the terms, conditions, delivery, price, quality, quantities, or specifications of this order will be effective without written consent of Purchaser's Purchasing Department. We will not be responsible for any goods delivered without a Purchase Order Number. PACKING: No charges will be allowed for special handling, packing, wrapping, bags, containers, reels, etc. unless otherwise specified herein. DELIVERY: For any exception to the delivery date as specified on this order, Vendor shall give prior notification and obtain approval therefor from Purchaser's Purchasing Department. With respect to delivery under this order, time is of the essence and the order is subject to termination for failure to deliver on time. This acceptance by Purchaser of late performance with or without objection or reservation shall not waive the right to claim damage for such breach nor constitute a waiver of the requirements for the timely performance of any obligation remaining to be performed by Vendor. PAYMENTS AND ASSIGNMENTS: All payments to Vendor shall be remitted by A/E. Purchaser shall not honor drafts, nor accept goods on a sight draft basis. Furthermore, provision of monies due under the contract shall only be assignable with prior written consent of Purchaser. SHIPPING INSTRUCTIONS: Unless otherwise specified, all goods are to be shipped prepaid FOB Destination. Where specific authorization is granted to ship goods FOB Shipping Point, Vendor agrees to prepay all shipping charges, to use cheapest common carrier, and to bill Purchaser as a separate item on the invoice for said charges, less federal transportation tax. Each invoice for shipping charges shall contain the original or a copy of the bill indicating that the payment for shipping has been made. It is also agreed that Purchaser reserves the right to refuse COD shipments. </small>				
Vendor/Purchasing Copy				

Added Graphical Elements

Move Data where you want it

Elimination of unwanted data

Digitized Signature

Add Additional Text

Customized Copies

Figure 2 After FormFusion

FormFusion Suite

Appendix B: Getting Started

Before you delve into the advanced concepts found elsewhere, you may like to review just how simple it is to begin. You can literally take one of our pre-designed Banner process templates, import it, add your logo and details, and go into production in minutes. How long further customizations take is entirely up to you.

Select a Database


Log in to a database session. On the left-hand side of the application window you will find a panel with three buttons and a drop-down combo box. First you need to select



the Oracle SQL*Net session you would like to connect to. The sessions in the drop-down list are read from the "tnsnames.ora" file. If the session is not in the drop-down list, you may type it into the edit

box. Select a session from the drop_down box Every time you exit FormFusion the last session used is saved to the Windows(tm) Registry. The next time you return to FormFusion, the session will be displayed in the box automatically.

Log in

After the session has been chosen, click on the Login icon.  Alternatively, you can type the shortcut keys <CTRL> and L. At this point, you will be prompted for a Username and Password. The session drop-down list will become disabled disallowing the option to change the Oracle session.









After the session is logged in, assuming there were no warning messages, you should see a view of the FormFusion table structure. The tree view may or may not contain groups and processes at this point. This will depend on whether your DBA installed the Evisions Sample Forms or have created forms for your organization's use.

Process Tree

This section will discuss the layout and organization of the "Process Tree View." This can also be thought of as the view into FormFusion tables residing in the Oracle session. Each entry in the tree view is called a "tree node" (or "node" for short). Each node represents an entry in one or more of the FormFusion tables.

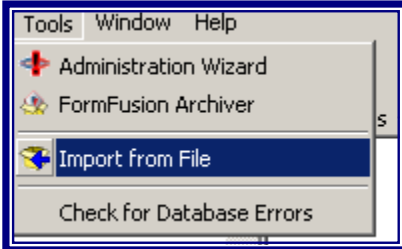
"Process Group Nodes" are containers for other group nodes or process nodes. "Process Nodes" are containers for special print parameter nodes. "Special Print Parameter Nodes" are containers for the process modifier nodes. "Process Modifier Nodes" are all nodes that add a new feature to a special print parameter. Each plug-in provides a different process modifier node type.

A Closer Look

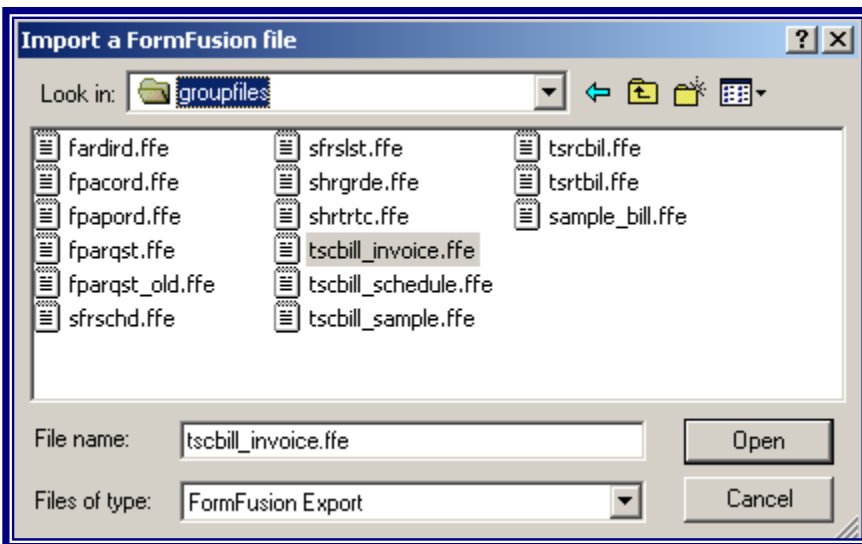
Node type	Description
 Process Group	Each group node is pulled from the EVIPGRP table. A group can contain other groups or processes. A group can contain nothing else and has no configurable properties of its own. When you choose a group node in the tree view, additional options become available in the "Edit" and "Tools" menus. A group can be added to the root level (no parent node).
 Process	Each process node is pulled from the EVISCTP table. A process can only contain a special print parameter. There are no configurable properties to a process. When you choose a group node in the tree view, additional options become available in the "Edit" menu. A process can be added to the root level (no parent node).
 Special Print Parameter (SPP)	Each SPP is pulled from the EVISPP table. An SPP can only contain process modifier nodes. By selecting the node in the tree view, additional options become available in the "Edit" menu. The "properties" of the special print parameter can be modified by either choosing the "Edit Properties" menu option or right-clicking and selecting "Properties" from the popup menu. Also, each type of available process modifier can be selected from the "Edit New" menu or popup menu. For more information on changing properties and adding process modifiers see Working with Special Print Parameters
Process Modifier	There are multiple process modifier types. Each will be described in detail below. In general, each process modifier is pulled from the EVIPMOD table. Each process modifier is a configurable node and may or may not house any child nodes.
CaptureForm Plug-In	
 CaptureForm	The CaptureForm node is linked to EVIPMOD using the EVICFORM table. Choosing "properties" for a CaptureForm node will bring up the CaptureForm properties dialog box. There, you can add any custom SQL queries that should execute for the process and special print parameter when executed on the server. For more information on changing properties and creating the queries, see Using CaptureForm-SQL
FormDirector Plug-In	
 FormDirector	The FormDirector node is linked to EVIPMOD using the EVIFDDIR table. Choosing "properties" for a FormDirector node will bring up the FormDirector properties dialog box. There, you can specify which directors should be used for the process and special print parameter when executed on the server. Each director uses a different table to store its information: EVIFDARC, EVIFDEML, EVIFDFAX, EVIFDPRT, and EVIFDWEB. For more information on changing properties and redirecting output, see Using FormDirector
FormStamp Plug-In	
FormStamp provides for two process modifier nodes. Each FormStamp node is linked to EVIPMOD using the EVIFSTMP table. For more information on these two types of nodes and configuring FormStamp see Using FormStamp .	
 PCLForm	The first node type is PCLForm which is a graphical designing tool allowing for the drawing of graphics, shapes, text, and data fields. The node is linked to EVIFSTMP using the EVIPCLF table. Some properties are available to edit when the PCLForm is closed but most properties are only editable when the node is opened. Open by either double-clicking the node or choosing "Open" from the "Edit" or popup menus.
 MACFile	The second node type is MACFile. This node type is rarely used and is merely a non-editable PCL file. Properties are the same for the MACFile as they are for the PCLForm when the nodes are closed. The MACFile cannot be opened.
MapForm Plug-In	
 MapForm	The MapForm node is linked to EVIPMOD using the EVIMAPF table. Properties for a MapForm are only available when the MapForm is <i>opened</i> . To open a MapForm node either double-click the node or choose "Open" from the Edit or popup menus. The properties of a MapForm node can also be found in the special print parameter node. See Using MapForm for details on configuring and using this plugin.

Importing a sample Group File

Select the process group to import the file beneath. If you would like to import the file to the root level then select the empty area of the process tree view (no node selected).



In the "Tools" menu, click "Import from File". If you want to import a file that was saved in a different folder, locate and open the folder that contains the list of available import group files.



Double-click the file you want to open (**Note:** the filename will have a .ffe extension). The imported file will be placed beneath the currently selected group and the tree structure within that file will be created.

A status screen indicating what is being imported will be displayed. Upon completion, this screen will be closed and the process node will have been imported. In this sample, the process node is named Billing_Invoice.

