

Report-IV to PDF™ Installation/Setup/User Guide



Version 8.6.0

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HOW TO INSTALL AND SETUP REPORT-IV TO PDF

Introduction

You should have received the following:

- At least one CD (check the version number).
- A Software License Agreement
- A Software Registration Card (please take the time to fill this out and return it)

Overview

Report-IV to PDF allows you to save Report-IV output as a .pdf file by selecting a printer associated with the PDF converter. Some of the options are:

- e-Mail the .pdf file as an attachment using simple e-mail options or by executing an e-Mail Method.
- Fax the .pdf file using simple fax options or by executing a Fax Method.
- Execute a custom Post Save Method.
- View archived .pdf files with support for deleting, renaming, e-mailing and faxing a selected file.

Installation

Window Platforms

Browse the CD, click on **setup.exe** and follow the prompts.

This will install the Report-IV to PDF driver (rpt4pdf.exe). By default this will install rpt4pdf.exe to C:\Program Files\Report4PDF; however, you can install it wherever you want. Read and write permissions for all users is required. The conversion process will create temporary work files in this directory.

The setup will also extract the Report-IV to PDF merge files to your existing TS Environment for Windows IDL4 directory. The setup will automatically determine the path to your 8.6.0 or 8.521 installation on the target system.

If it cannot an error message is displayed and the setup must be terminated. Please install or re-install a TS Environment for Windows including Report-IV version 8.521 or greater, and then install Report-IV to PDF.

Note: If the setup does not return the correct or the desired path, it is an indication that the TS Environment folder names or their locations have been manually modified. It can also be an indication that there is more than one TS Environment for windows installed on the target system. If this happens please contact your Thoroughbred support representative for assistance.

When the setup is complete the Report-IV to PDF files must be merged. Continue with Merge and Configure Report-IV to PDF section documented below.

Linux, SCO, AIX, HP-UX

The CD-ROM contains a set cpio files for the four supported operating system; SCO, AIX, HP and Linux. For each operating system there is a cpio file for the Report-IV to PDF drivers and there are cpio files containing Report-IV to PDF merge files for Report-IV 8.521 and 8.6.0.

Before using cpio with a CD-ROM drive, the drive must be mounted. Sample mount commands are as follows:

```
SCO: mount -r -f HS,lower /dev/device-name /mountpoint
```

```
AIX: mount -r -v cdrfs /dev/device-name /mountpoint
```

```
HP: mount -r -F cdfs /dev/device-name /mountpoint
```

```
Linux: mount -r -t iso9660 /dev/device-name/mountpoint
```

After mounting the CD-ROM drive, continue with the documented steps below.

1. Extract and Install Report-IV to PDF Drivers

Four different sets of the Report-IV to PDF drivers are provided in cpio format. Supported platforms are: Linux, SCO, AIX, and HP. Each cpio file (rcpdriver) is located on the media in its own platform-specific directory.

```
aix/rcpdriver  
hp/rcpdriver  
linux/rcpdriver  
sco/rcpdriver
```

The cpio file containing the rcpdriver for your platform can be extracted into any existing directory that can be made accessible to your existing Basic/Report-IV installation. The conversion process will create temporary text files in this directory. The directory must have read and write permissions.

When defining the path for the PDF converter, please take into consideration that the maximum length for a file name in Basic is 64 bytes. Default file names are a total of 35 or 36 bytes; 31 bytes for the file name and 5 or 4 bytes for the file extension (for example: .txt1 or .pdf). For example Basic must be able to create: /usr/basic/PDFConverter/OERCUST-20070710115524499520tsi.txt1.

Using cpio, extract the contents of rcpdriver into the desired directory. Be careful to extract the correct version of rcpdriver for your operating system.

The following example will extract the SCO drivers from the cpio file rcpdriver located in the sco directory on the media into an existing directory named /usr/public/PDFConverter.

```
1. cd /usr/public/PDFConverter
2. umask 0
3. cpio -ivBmud <cdrom/sco/rcpdriver
```

Note: cdrom is the mountpoint name.

Note: use **-ivBmud** if you are installing Linux, use **-icvBmud** if you are installing on other platforms.

1 Extract and Install the Linux e-mail shell script

Note: This step is only applicable to **Linux** installations.

The shell script sendattach.sh can be used by Report-IV to PDF to send a .pdf file as an e-mail attachment. This shell script uses the sendmail command. It assumed that sendmail is installed and functioning properly along with any required encoding. Typically .pdf files are sent as attachments using uuencode. Encoding options are covered in more detail later in this document.

We strongly recommend extracting the shell script sendattach.sh to /usr/lib/sendmail; however, it is not restricted to that directory. The path of sendattach.sh is maintained in Settings and Options, covered later in this document.

The cpio file sendattch contains the shell script sendattach.sh. This is located in the linux directory on the CD-ROM.

The following example assumes the CD has already been mounted using mountpoint cdrom. It will extract sendattach.sh from linux/sendattch into /usr/lib/sendmail.

```
1. cd /usr/lib/sendmail
2. cpio -ivBmud </cdrom/linux/sendattch
```

The sendattach.sh script expects that sendmail is installed in /usr/lib/sendmail or /usr/lib/basic. If sendmail is not located in one of those directories the sendattach.sh shell script must be modified. Open sendattach.sh with vi or the editor of your choice. Locate the “Initialize main variables” section of the sendattach.sh script (see below). Modify the script to set the SENDMAIL variable to the correct sendmail path.

```
# Initialize main variables ...

if [ -x /usr/sbin/sendmail ] ; then
    SENDMAIL=/usr/sbin/sendmail
elif [ -x /usr/lib/sendmail ] ; then
    SENDMAIL=/usr/lib/basic
else
    exit 0
fi
```

The following example illustrates a modified shell script when sendmail is installed in /usr/mymail. The first if has been modified setting

```
# Initialize main variables ...

if [ -x /usr/sbin/sendmail ] ; then
    SENDMAIL=/usr/sbin/sendmail
elif [ -x /usr/lib/sendmail ] ; then
    SENDMAIL=/usr/lib/basic
else
    SENDMAIL=/usr/mymail/sendmail
fi
```

3 *Extract the merge files*

The Report-IV to PDF merge files must be extracted to your existing Basic/Report-IV installation. These include RCPOBJ, RCPFIL, INSTOBJ, INSTFIL, INSTALL and INSTALL1.

If you are installing the product on top of an existing 8.521 environment you must use the 8521 cpio file.

If you are installing the product on top of an existing 8.6.0 environment you must use the 860 cpio file.

For convenience both of these cpio files are included in all four platform directories on the CD-ROM.

```
aix/8521
aix/860
hp/8521
hp/860
linux/8521
linux/860
sco/8521
sco/860
```

The following example assumes the CD has already been mounted using mountpoint `cdrom`. It will extract the 8.521 merge files from the `sco` directory on the media to `/usr/basic852/IDL4` on a **SCO** system.

```
1. cd /usr/basic852/IDL4
2. cpio -icvBmud </cdrom/sco/8521
```

Note: `cdrom` is the mountpoint name.

Note: use `-ivBmud` if you are installing Linux, use `-icvBmud` if you are installing on other platforms.

4. Merge and Configure Report-IV to PDF

Before starting the merge process make the necessary modifications to your `IPLINPUT` file.

A hierarchical `DEV` line is required. Verify that the `IPLINPUT` file contains a `DEV` line with the *hierflg* set to 1. For example:

```
DEV D9,1,,,1,,
```

Modify the `IPLINPUT` file adding a null `DEV` line for the Report-IV to PDF converter. For example to define `RC` as the Report-IV to PDF converter device add the following to your `IPLINPUT` file:

```
DEV RC,4,,,1,,,/dev/null
```

or for window platforms:

```
DEV RC,4,,,,,NULL
```

For more information see the Basic Customization and Tuning Guide (System Files).

Start Basic using the modified `IPLINPUT` file. From Basic console mode enter **RUN "INSTALL"**. This will install the Report-IV to PDF programs and Dictionary-IV definitions.

When the installation is almost complete, the Installation Complete screen will be displayed. Press **Enter** to continue with `SETUP`. This will run the final process in the installation process. This will install the `PDFCNV` terminal table and will take you directly to the Report-IV to PDF Settings and Options screen to set your preferences. For more information see Configure the Settings and Options section of this manual.

Note: You can skip this step by pressing **F4** to exit the Settings and Options screen; however, until Report-IV to PDF is properly configured it will not be able to locate certain directories and files and will report errors if you attempt to run the product.

For more information on the merge process please refer to the OPENWORKSHOP_AND_IDOL-IV_FOR_UNIX_LINUX_WINDOWS_V860.PDF located in the INSTALLATION\INSTALLATION_GUIDES directory on this media.

From the OPENworkshop **System Administration** menu, select **Printer Assignment**. Assign the printer table **PDFCNV** to the null printer device specified in your IPLINPUT file. For example:

```
DEV RC,4,,,1,,,/dev/null
```

Using RC as an example, when RC is selected for output from the Report-IV hardcopy prompt (Select Printer...), the report output will be converted and saved as a .pdf file.

Configure the Settings and Options

Before running Report-IV to PDF you must configure the global Settings and Options. The Settings and Options contain specifications that enable Report-IV to PDF to manage the conversion process.

The values are saved in a configuration file managed by Link OOLPDF1. Each time an OPENworkshop session is started, the global format #OOFPDF1 is populated with the saved settings and options.

For example when OPENworkshop is run the #OOFPDF1.POST-SAVE-METHOD is set to the default value for the Post Save Method that you define in the Settings and Options screen. If a particular report requires a different Post Save Method you can override the default value for #OOFPDF1.POST-SAVE-METHOD in your application code.

```
LET DFLTMN$ = #OOFPDF1.POST-SAVE-METHOD,  
#OOFPDF1.POST-SAVE-METHOD = method_name  
CONNECT REPORT report_name
```

```
LET #OOFPDF1.POST-SAVE-METHOD = DFLTMN$
```

Note: Once changed, the default values will not be reset until the global format is initialized. For more information on resetting the global, see Reset Globals covered later in this document.

Note: If you are not running OPENworkshop you must call OORPDF02 to initialize #OOFPDF1 before accessing Report-IV to PDF. For more information, see the Using Report-IV to PDF, Runtime Settings and Options sections covered later in this document.

When Report-IV to PDF is installed the Settings and Options screen will automatically be displayed as the final step in the merge process.

To access Settings and Options from the main OPENworkshop select **Utilities** and then select **Report-IV to PDF Utilities**. You will see the following:


```

View PDF files
Rebuild PDF Log
Settings and Options
Settings Overview
Reset Global

```

Note: The Settings and Options must be configured prior to selecting any of the other available options.

Select **Settings and Options** and the following screen will display:

```

Save Changes? Yes-Update record No-Do not Update record <F4>-Make Corrections
> Report to PDF globals <
Report-IV to PDF Settings and Options

Path to PDF converter: /usr/public/PDFConverter
Path to saved PDF files: /usr/public/PDFOutput
Path to PDF background pages:/usr/public/PDFConverter
Post Save Method Enabled:      Method Name:

Email Enabled:
  From:                      Reply to:
Subject:
  Body:
Command: /usr/local/bin/sendattach.sh -t $TO -c $CC -f $FROM -s $SUBJ -m $MSG

Fax Enabled:
  From Name:                  Company:
  From Fax Nbr:               Voice Number:
Subject:
Message:
Command: /usr/local/bin/sendfax -n -h domain.name.com -d $FTFN $FILE

```

Description of Fields

Path to PDF converter

Required value. Maximum 80 bytes; the global: #OOFPDF1.PDF-PATH requires a full path to rpt4pdf software.

For all Linux, Unix, SCO and AIX installations: If the full path to rpt4pdf is not set then a default value of *<basic-install-path>/PDFConverter* will be used. For example if Thoroughbred Basic is installed in /usr/basic and PDF-PATH is not set, it will be assumed that /usr/basic/PDFConverter contains the rpt4PDF software.

For Windows installations: a default path of C:\Program Files\Report4PDF will be assumed.

The maximum length for a file name in Basic is 64 bytes. When defining the path for the PDF converter, please take this into consideration. Default file names are a total of 36 bytes; 31 bytes for the file name and 5 bytes for the file extension (.txt1).

The directory must have read and write permissions. The conversion process will create temporary text files in this directory.

For example Basic must be able to create: /usr/basic/PDFConverter/OERCUST-20070710115524499520tsi.txt1.

Note: The Report-IV to PDF Converter requires a DEV PREFIX in the IPLINPUT file:DEV D9,1,,,,1,,

Path to saved PDF files

Required value. Maximum 80 bytes; the global: #OOPDF1.RPT-PATH requires a full path to where the .pdf files will be saved. For example:

```
/public/PDFOut  
/usr/basic/PDFOut  
C:\PDFOut
```

The maximum file name length in Basic is 64 bytes. When defining the path to saved PDF files, please take this into consideration. Default file names are a total of 35 or 36 bytes; 31 bytes for the file name and 5 or 4 bytes for the file extension (.txt1 or .pdf).

The directory must have read and write permissions. The conversion process will copy the converted pdf file from the PDF converter directory to the directory of saved pdf files.

For example:

```
/usr/basic/PDFConverter/OERCUST-20070710115524499520tsi.txt1  
/usr/basic/PDFOut/OERCUST-20070710115524499520tsi.pdf
```

Path to Background .pdf files

Optional value. Maximum 80 bytes; the global: #OOPDF1. BACKPG-PATH requires a full path to where the .pdf background files are stored. For example:

```
/public/PDFBackpgs  
/usr/basic/PDFBackpgs  
C:\PDFBackpgs
```

Background .pdf files function as overlays or templates. When a .pdf file is created the contents of a background .pdf is layered with the Report-IV output. Using this technique, Report-IV to PDF can be used to print forms or print logos on reports.

It is recommended that you do not use the same directory as the saved .pdf files. This would result in the background .pdf files appearing the View of archived pdf files.

See Using Report-IV to PDF, #OOFPDF01.BACKPG below for more details and an example.

Post Save Method Enabled

Optional default value. 1 byte; the global: #OOFPDF1.ENABLE-POST-METHOD defines the default value for ENABLE-POST-METHOD. The Post Save Method is only executed when ENABLE-POST-METHOD = "Y". This allows you to enable or disable the Post Save Method at runtime by simply setting this flag and avoids having to clear and reset the Post Save Method name.

Post Save Method Name

Optional default value. Maximum 8 bytes; the global: #OOFPDF1. POST-SAVE-METHOD defines the default value for the Post Save Method name. The Post Save Method is executed immediately after the .pdf file is saved and before the e-Mail and Fax commands are processed. The method is only called when #OOFPDF1.ENABLE-POST-METHOD = "Y".

Email Enabled

Optional default value. 1 byte; the global: #OOFPDF1.ENABLE-EMAIL defines the default value for the ENABLE-EMAIL. The EMAIL-CMD is only executed when ENABLE-EMAIL = "Y". This allows you to enable or disable the e-mail command at runtime by simply setting this flag and avoids having to clear and reset the e-mail command line

From

Optional default value. Maximum 50 bytes, the global: #OOFPDF1.EMAIL-FROM defines the default value for EMAIL-FROM. This is used to populate the "from e-mail address" when using EMAIL-CMD. For more information, please see EMAIL-CMD.

Reply To

Optional default value. Maximum 50 bytes; the global: #OOFPDF1.EMAIL-REPLY defines the default value for EMAIL-REPLY. This is used to populate the "reply to e-mail address" when using EMAIL-CMD. If not set, EMAIL-FROM will be used for the reply to e-mail address. For more information, please see EMAIL-CMD.

Subject

Optional default value. Maximum 80 bytes; the global: #OOFPDF1.SUBJECT defines the default value for SUBJECT. This is used to populate the "e-mail subject line" when using EMAIL-CMD. For more information, please see EMAIL-CMD.

Body

Optional default value. Maximum 255 bytes; the global: #OOFPDF1.BODY defines the default value for BODY. This is used to populate the "e-mail body" when using EMAIL-CMD. For more information, please see EMAIL-CMD.

Email Command

Optional default value. Maximum 255 bytes; the global: #OOFPDF1.EMAIL-CMD defines the default e-mail command or an e-mail method that will be used to send a .pdf file as an e-mail attachment.

EMAIL-CMD can be set to either METHOD *method-name* or an e-mail command line argument.

The contents of #OOFPDF1.EMAIL-CMD will only be executed when #OOFPDF1.ENABLE-EMAIL = "Y".

Email Method

When EMAIL-CMD(1,7)="METHOD " it is assumed that what follows is the name of the method to be called. For example to call a custom method named MYEMETH set EMAIL-CMD = "METHOD MYEMETH". The CALL list for the method must be MSG\$[ALL]. MSG\$[1] and will contain the full. pdf file name including path. For example:

```
/public/PDFDocs/MYPDFFILE.pdf
```

The method is executed immediately after the .pdf file is created. No other e-mail command processing will be done.

Email Command Line

When EMAIL-CMD(1,7) <> "METHOD " the contents of EMAIL-CMD is assumed to be a command line argument. This can be any valid command line argument to support whatever e-mail software might be in place.

The command line argument option also supports \$variables. At runtime these variables are replaced with the current values from the global format #OORPDF1. See below for more details regarding \$variables.

The Linux version of Report-IV to PDF is shipped with a shell script sendattach, which uses sendmail. We assume the shell script will be installed in /usr/lib/basic. If not the default e-mail command must be modified to include the correct path to sendattach.sh. The default e-mail command is:

```
/usr/lib/basic/sendattach.sh -t $TO -c $CC -f $FROM -s $SUBJ  
-m $MSG -u $FILE
```

Note: The command includes the required path and **DOES NOT** include ".". Do not enter "." in front of the path.

The following is an example of the above command after it has been parsed and the substitution values applied to the \$variables. The -u switch will send the attachment using uuencode encoding.

```
/usr/local/bin/sendattach.sh -t cust@company.com -f tbred@tbred.com  
-s "attached pdf file" -m "Please see attached pdf file"  
-u /public/PDFDocs/MYPDFFILE.pdf
```

Supported switches are:

t	to e-mail address
f	from e-mail address
c	cc e-mail address
r	reply to address
s	subject line
m	body message
u	uuencode encoding
b	base64 encoding
n	no encode

Supported \$variables:

The following is a list of supported variables. Support for variables is independent of the e-mail command line. Variables are listed on the left with the corresponding substitution values on the right. For example: \$TO will be substituted with the current value of #OOFPDF01.EMAIL-ADDR.

Variable	Substitution
\$FILE	#OOFPDF1.PDF-RPT-NAME
\$SUBJ	#OOFPDF1.SUBJECT
\$MSG	#OOFPDF1.BODY
\$TO	#OOFPDF1.EMAIL-ADDR
\$FROM	#OOFPDF1.EMAIL-FROM
\$CC	#OOFPDF1.EMAIL-CC
\$REPLY	#OOFPDF1.EMAIL-REPLY

The system command is executed immediately after the .pdf file is created. No other e-mail command processing will be done.

Enable Fax

Optional default value. 1 byte; the global: #OOFPDF1.ENABLE-FAX defines the default value for the ENABLE-FAX. The FAX-CMD is only executed when #OOFPDF1.ENABLE-FAX = "Y".

Fax From Name

Optional default value. Maximum 30 bytes; the global: #OOFPDF1.FAX-FROMNAME, defines the default value for FAX-FROMNAME. This is used to populate the "fax from name" when using the FAX-CMD. For more information, please see FAX-CMD.

Fax From Company Name

Optional default value. Maximum 30 bytes; the global: #OOFPDF1.FAX-FROMCOMPANY defines the default value for FAX-FROMCOMPANY. This is used to populate the "fax from company name" when using the FAX-CMD. For more information, please see FAX-CMD.

From Fax Number

Optional default value. Maximum 25 bytes; the global: #OOFPDF1.FAX-FROMFAXNUMBER defines the default value for FAX-FROMFAXNUMBER. This is used to populate the "from fax number" when using the FAX-CMD. For more information, please see FAX-CMD.

From Voice Number

Optional default value. Maximum 25 bytes; the global: #OOFPDF1.FAX-FROMVOICENUMBER defines the default value for FAX-FROMVOICENUMBER. This is used to populate the "from fax voice number" when using the FAX-CMD. For more information, please see FAX-CMD.

Fax Subject

Optional default value. Maximum 80 bytes; the global: #OOFPDF1.FAX-SUBJECT, defines the default value for FAX-SUBJECT. This is used to populate the "from fax subject" when using the FAX-CMD. For more information, please see FAX-CMD.

Fax Message

Optional default value. Maximum 255 bytes; the global: #OOFPDF1.FAX-MESSAGE, defines the default value for FAX-FAX-MESSAGE. This is used to populate the "fax message" when using the FAX-CMD. For more information, please see FAX-CMD.

Fax Command

Optional default value. Maximum 255 bytes; the global: #OOFPDF1.FAX, defines the default fax command or fax method that will be used to send a .pdf file as a fax. FAX-CMD can be set to either METHOD *method-name* or a fax command line argument to be executed.

The contents of FAX-CMD will only be executed when #00FPDF1.ENABLE-FAX = "Y".

Fax Method:

When FAX-CMD(1,7)="METHOD " it is assumed that what follows is the name of the method to be called. For example to call a custom method named MYEMETH set FAX-CMD = "METHOD MYEMETH". The CALL list for the method must be MSG\$[ALL]. MSG\$[1] contains the full pdf file name including path. For example:

```
/public/PDFDocs/MYPDFFILE.pdf
```

The method is executed immediately after the .pdf file is created. No other fax command processing will be done.

Fax Command Line:

When FAX-CMD(1,7) <> "METHOD " the contents of FAX-CMD is assumed to be a command line argument. This can be any valid command line argument to support whatever fax software might be in place.

The command line argument option also supports \$variables. At runtime the \$variables are replaced with the current values from the global format #OORPDF1.

The following example assumes VSI*FAX is the installed fax software.

```
/usr/vsifax/bin/vfx -n $FTFN -U $FFNM $FILE
```

Note: The command includes the required path and DOES NOT include ".". Do not enter "." in front of the path.

The following is an example of the above command after it has been parsed and the substitution values applied to the \$variables.

```
/usr/vsifax/bin/vfx -n 7325601594 -U TSI MYFILE.pdf
```

\$variables:

The following is a list of supported variables. Support for variables is independent of the fax command. Variables are listed on the left with the corresponding substitution values on the right. Example: \$FTFN will be substituted with the current value of #OOFPDF01.FAX-TOFAXNUMBER.

Variable	Substitution
\$FILE	PDF-RPT-NAME
\$SUBJ	SUBJECT
\$MSG	BODY
\$FTFN	FAX-TOFAXNUMBER
\$FTNM	FAX-TONAME
\$FTCO	FAX-TOCOMPANY
\$FFNM	FAX-FROMNAME
\$FFCO	FAX-FROMCOMPANY
\$FFFN	FAX-FROMFAXNUMBER
\$FFVN	FAX-FROMVOICENUMBER

The fax command is executed immediately after the .pdf file is created. No other fax command processing will be done.

USING REPORT-IV TO PDF

Runtime Settings and Options

When an OPENworkshop session is started, #OOFPDF01 is initialized and contains the values from Settings and Options. If you are not running in an OPENworkshop environment you will have to call OORPDF02 to initialize #OOFPDF01 before accessing Report-IV to PDF.

This can be done in a start up program by making the following call:

```
DIM PDF$[1];           ! Dim array
CALL "OORPDF02",PDF$[ALL] ! Call method to init globals
```

This can also be done in any of your application code by checking the #OOFPDF01.INIT-FLAG to determine if #OOFPDF01 has been initialized. After Report-IV to PDF completes the initialization logic, #OOFPDF01.INIT-FLAG = "1".

```
IF #OOFPDF01.INIT-FLAG <> "1" ! If not yet initialized
    DIM PDF$[1];           ! Dim array
    CALL "OORPDF02",PDF$[ALL] ! Call method to init globals
FI;                          ! Endif
```

In addition to the values defined on the Settings and Options screens there are several global runtime settings in #OOFPDF1.

#OOFPDF1.PDF-RPT-NAME

Maximum 38 bytes; is the name to be used for the file. If this field is not set prior to executing a CONNECT REPORT a default file name will be created using the following convention:

(1,8) Report-IV definition name padded to 8 bytes using the "-" character.

(9,20) Create date and time YYYYMMDDHHMISSSSSSSS

(29,3) Operator code

(32,5) or (32,4) File extension (for example: .txt1 or .pdf).

Please take into consideration that the maximum length for a file name in Basic is 64 bytes. The conversion process will create a temporary text file in #OOFPDF1.PDF-PATH using #OOFPDF1.PDF-RPT-NAME and an extension of ".txt1". Once converted it will be renamed to #OOFPDF1.PDF-RPT-NAME with an extension of ".pdf" and moved to #OOPDF1.RPT-PATH.

FAX-TOFAXNUMBER

Maximum 25 byte; is the "fax to phone number."

FAX-TONAME

Maximum 30 bytes; is the "fax to name."

FAX-TOCOMPANY

Maximum 30 bytes; is the "fax to company name."

EMAIL-ADDR

Maximum 75 bytes; is one or more e-mail addresses to be sent. The format will vary depending upon the e-mail software being used. For example:

emp1@tbred.com, emp2@tbred.com, emp3@tbred.com

EMAIL-CC

Maximum 75 bytes; is one or more "carbon copy (CC) e-mail addresses."

INIT-FLAG

1 byte; which by setting INIT-FLAG = " " (\$20\$) will force #OOFPDF1 to be initialized to all default values the next time Report-IV to PDF is selected as the output device.

BACKPG

Maximum 80 bytes; contains the background .pdf file name. A background .pdf file functions as an overlay or template. When a .pdf file is created the background .pdf is layered with the Report-IV output.

To use this feature, set the name of the background .pdf file prior to executing a CONNECT REPORT report_name.

```
FORMAT INCLUDE #OOFPDF01, OPT="NONE"  
  
LET #OOFPDF01.BACKPG = "BkpgExample.pdf"  
  
CONNECT REPORT "MY_REPORT"
```

In the following example a Thoroughbred invoice was scanned and saved as a pdf file. That pdf file was used as a pdf background when printing Invoices to the Report-IV to PDF converter.

CUSTOMER INVOICE

Customer Code: 100105
Customer PoNbr: 0000285

Invoice Nbr: 000006
Invoice Date: 06/11/07

Order Number: 5600285
Shipped Via: FedEx

Invoice To:
Lumber Inc.
Walter Snider
Big Horn ND 58231
701 632-5400

Remit To:
Thoroughbred Software International, Inc.
Attn: Accounts Receivable
285 Davidson Avenue, Suite 302
Somerset, NJ 08873-4153

Inv. Lin Nbr	Product Code	Description	Qty.	Unit Price	Price Extension
01	10-100-000	Little nails	6	2.00	7.20
02	10-100-010	Big nails	6	5.00	18.00
03	10-100-020	Bigger nails	6	6.00	21.60
04	10-100-030	Huge nails	6	8.00	28.80
05	20-100-000	Little hammer	6	8.00	28.80
06	20-100-010	Big hammer	6	18.00	64.80
07	20-100-020	Bigger hammer	6	30.00	108.00
08	20-100-030	Huge hammer	6	50.00	180.00
09	30-100-000	Little saw	6	12.00	43.20
10	30-100-010	Big saw	6	20.00	72.00
11	30-100-020	Bigger saw	6	40.00	144.00
12	30-100-030	Huge saw	6	120.00	432.00
					\$1,914.00

Past due invoices are subject to 1 1/2% monthly finance charge.

Please Pay
Last Amount
Shown Above

White: Customer Green: Remittance Yellow: File Pink: Accounting Gold: Sales

In addition to setting the background .pdf file name, the full path to the background .pdf file must be set. See Settings and Options, Path to Background .pdf files.

LEFT-MARGIN

5.2 numeric; is the setting for the left margin in inches. The default value is .50.

RIGHT-MARGIN

5.2 numeric; is the setting for the right margin in inches. The default value is .50.

LINE-SPACE

3.0 numeric; is the setting for the space between lines. This is always in points 1/72 of an inch. The default value is 2.

FONT-SIZE

2 bytes; is the font size. The default value is calculated based on the Report-IV width.

Maintaining Archived .pdf Files

View PDF files

From the **Report-IV to PDF Utilities** menu select the **View PDF files** to view a log of archived pdf files. The log file is updated automatically each time a .pdf file is created.

If the .pdf file was created using the default file name the view will display: the PDF File Name, Report-IV Description, the date the .pdf file was created (YYYY/MM/DD), the time the .pdf file was created (HH:MM:SS), and the operator code that created the .pdf file. If a default file name was not used, the log file will contain an entry that will be included in the view; however, the view columns may not contain the expected fields.

<F1> Email PDF File <F2> Fax PDF File	
OOVPDF2 > Rpt to PDF saved files <	
PDF File Name	Report-IV Description PDF Create PDF Crea Oper YYYY/MM/DD HH:MI SS Code
=====	=====
OERCUST-20070606084121499904dmd	Sample System - Custo 2007/06/06 08:41 21 dmd
OERCUST-20070606084126499872dmd	Sample System - Custo 2007/06/06 08:41 26 dmd
OERINVD-20070606084147499392dmd	Sample System - Invoi 2007/06/06 08:41 47 dmd
OERINVD-20070606084142499424dmd	Sample System - Invoi 2007/06/06 08:41 42 dmd
OERINVD-20070606084131499840dmd	Sample System - Inven 2007/06/06 08:41 31 dmd
OERSLRP-20070606084136499808dmd	Sample System - Sales 2007/06/06 08:41 36 dmd

Delete an archived .pdf file

Scroll to the file to be deleted and enter the appropriate keystroke(s) for **Line-Del**. This will delete the entry from the log file and remove the .pdf file from the directory of saved .pdf files (#OOPDF1.RPT-PATH).

Rename an archived .pdf file

Scroll to the file name, press **Enter** and type in the new file name. This will rename the file in the log and rename the file in the directory of saved .pdf files (#OOPDF1.RPT-PATH).

e-Mail an archived .pdf file

Scroll to the file name, press **F1** and the e-mail command screen will be displayed.

Send (Y/N)?

00VPDF2 > Rpt to PDF saved files <

PDF File Name	Report-IV Description	PDF Create YYYY/MM/DD	PDF Crea HH:MI	Oper SS	Code
OERCUST-20070606084121499904dmd	Sample System - Cust	2007/06/06	08:41	21	dmd
OERCUST-20070606084126499872dmd	Sample System - Cust	2007/06/06	08:41	26	dmd
OERINVD-20070606084147499392dmd	Sample System - Invoi	2007/06/06	08:41	47	dmd
OERINVH-20070606084142499424dmd	Sample System - Invoi	2007/06/06	08:41	42	dmd
OERINVN-20070606084131499840dmd	Sample System - Inven	2007/06/06	08:41	31	dmd
OERSLRP-20070606084136499808dmd	Sample System - Sales	2007/06/06	08:41	36	dmd

Report to PDF email

PDF Email OERCUST-20070606084126499872dmd.pdf

To: cust@tbred.com
 From: tbred@tbred.com
 Subject: Customer Master Listing
 Reply To: tbred@tbred.com
 Message: See attached pdf for current Customer Master listing

Command:
 /usr/local/bin/sendattach.sh -t \$TO -c \$CC -f \$FROM -s \$SUBJ -m \$MSG -r \$RE

Enter the required information to send the .pdf file as an e-mail attachment. The current value of #OOFPDF1.EMAIL-CMD will be used as the default command line argument. This can be modified before sending the e-mail. The \$variables will automatically be replaced with the appropriate values from #OOFPDF1 after a response of **Y** to the Send (Y/N) prompt. For more information see Configure Settings and Options, e-Mail Command Line section of this manual.

Fax an archived .pdf file

Scroll to the file name, press **F2** and the fax command screen will be displayed. The fax screen is similar to the e-mail screen. Enter the required fields and respond **Y** to the Send (Y/N) prompt. For more information see Configure Settings and Options, Fax Command Line section of this manual.

Rebuild PDF log

If .pdf files are deleted or renamed manually at the system level, it may be necessary to rebuild the log file. Select this option to Rebuild the PDF log file. This will recreate the log file based on the contents of the directory containing saved .pdf files (#OOPDF1.RPT-PATH).

Reset Globals

This option will reset #OOFPDF1 based on the default values saved in Settings and Options. This will prompt you to confirm the action before the default values are restored.

Resetting the global #OOFPDF1 can also be achieved using several other techniques:

1. To reset to all default values without any user prompts and with error messages:

```
DIM PDFX$[1];  
CALL "OORPDF02",PDFX$[ALL]
```

2. To reset to all defaults values with a confirmation prompt:

```
DIM PDFX$[1];  
PDFX$[1]="r";  
CALL "OORPDF02",PDFX$[ALL]
```

3. To reset to all defaults values in silent mode; no prompts, no error messages:

```
DIM PDFX$[1];  
PDFX$[1]="S";  
CALL "OORPDF02",PDFX$[ALL]
```

4. Set #OOFPDF1.INIT-FLAG = " ". This will force the #OOFPDF1 to be reset to default values the next time Report-IV to PDF is selected for output.

Examples

Example 1

The following Method will set the .pdf file name in the Report-IV to PDF global before performing a CONNECT REPORT to OERCUST.

PROCEDURE

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE";! Include pdf global  
#OOFPDF1.PDF-RPT-NAME = "OERCUST"+ ! Override default  
      #IDSV.OPERATOR-CODE+      ! pdf file name  
      #IDSV.FILE-SUFFIX;  
DIM REPORT$[2];                  ! Dim array for report  
REPORT$[1]="OERCUST";            ! Set Report-IV name  
CALL "OOR",REPORT$[ALL];         ! Execute Connect Report  
#OOFPDF1.PDF-RPT-NAME=" ";       ! Clear pdf file name  
GOTO CUEXIT                      ! Do standard method exit logic
```

Example 2

The following Script will set e-mail options. After the report is converted to a .pdf file and saved it will be e-mailed as an attachment.

MAINLINE

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE"
! Save copy of global prior to email options
LET PDFGLOBAL$=#OOFPDF1,
! Set global with email options
  #OOFPDF1.ENABLE-EMAIL="Y",
  #OOFPDF1.EMAIL-ADDR="cust@tbred.com",
  #OOFPDF1.EMAIL-FROM="tbred@tbred.com",
  #OOFPDF1.SUBJECT="Customer Master list",
  #OOFPDF1.BODY="see attached pdf",
  #OOFPDF1.EMAIL-REPLY="tbred@tbred.com"
CONNECT REPORT "OERCUST"
! Clear email options by restoring global
LET #OOFPDF1=PDFGLOBAL$
```

TERMINATE

Example 3

The following Method will use a background pdf file, to overlay a company logo, adjust the left margin to .40, and set the font size to 11.

PROCEDURE

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE";
#OOFPDF1.BACKPG="BackgroundLogo.pdf",
#OOFPDF1.LEFT-MARGIN = .40,
#OOFPDF1.FONT-SIZE = "11";
DIM RPT$[1];
RPT$[1]="OERCUST";
CALL "OOR",RPT$[ALL];
GOTO CUEXIT
```

Thoroughbred Software International



OE-RCUST
06/06/07

Sample System - Customer Listing

Page: 1
11:09 AM

Cust Code	--- Contact ---	----- Name -----	----- City -----	St SR	-- Sales --
100100	Tex Rogers	Toot-Your-Horn	Port Lavaca	TX AP	18,335.10
100101	David Kelly	Fix-M-Up	Seadrift	TX HP	18,829.30
100102	Sue Thompson	Computer Inc.	Madison	NJ JJ	19,263.66
100103	Robert Brock	Today's Company	Bridgewater	NJ JS	19,637.36
100104	Sarah Smith	ACME Inc.	Dayton	NJ AP	19,952.00
100105	Walter Snider	Lumber Inc.	Big Horn	ND HP	20,007.24
100106	Dennis Gohlke	OK Development	Port Lavaca	TX JJ	20,400.82
100107	John Dworaczyk	Memory Lanes	Victoria	TX JS	11,943.78
ZZZZZ1	TEMP CUST1	TEMP CUST1	Port Lavaca	TX Z1	15,940.80
ZZZZZ2	TEMP CUST2	TEMP CUST2	Port Lavaca	TX Z2	15,322.86
ZZZZZA	TEMP CUSTA	TEMP CUSTA	Port Lavaca	TX JJ	17,534.88
ZZZZZZ	Deleted custs	Deleted custs		ZZ	.00
					197,167.80

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