User Guide

FS03 - Enhanced Printing v10x

By CMiC



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User Reference Guide – Version: CMiC Open Enterprise v10x

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Feature Set 03 – Enhanced Printing

Important Note

Please be aware that some modifications and enhancements may require licensing, specific configurations and setup, and may require the involvement of CMiC Consulting and further training. Please contact your Account Manager/Project Manager for more information where needed.

Quick Print

Overview – Quick Print

Request for I	nformation Send I/O Ema	l Add Copy Edit Delete	Submit Add Note Print Report Quick Print Li	nk to Issue 🛛 Back To Log 🛛 🕻 🗈 🏠
RFI Detail	Attachments 🖌	Related Objects		History
	Not Sub	mitted		
RFIN	0. 0002		Status	Pending
Fn	om Stephanie Bromfield		Submitted	
Co-Auth	or		Co-Author RFI No.	
	To Ferris Bueller		Received	
	CC Brooke Shields			
Subji	ect QUICK PRINT feature set (F03) - review		Change #	

The underlying concept of Quick Print is to allow users to assign a Report or Form Letter relevant to a particular PM object, such as an RFI, to the [**Quick Print**] button on the screen that displays individual records of the PM object. Also, Quick Print gives users the option of merging any attachments associated with the currently displayed PM object record to the Report/Form Letter assigned to the [**Quick Print**] button.

As an example, the above screenshot shows the [**Quick Print**] button on the Request for Information screen when it is displaying the details of an RFI. If clicked, the Report/Form Letter assigned to this screen's [**Quick Print**] button will be initiated, and if opted, any attachments for the displayed RFI will be merged to the assigned Report/Form Letter.

Assign Report to Quick Print Button

хP	Report Assignment							
	Report Type Report Object RFI	selected PM object	Repor	t Assignme	nt			
		Reports						Com
	Code	Desc.	Active	Default	Merge	Туре	Action	All Compani
\$	PM3010	Request For Information Record	✓			REP	+ 🛛	
\$	PM1200_001	RFI Urgent Response Needed	\checkmark	V	✓	FL	+ 🖄	
\$	PM1200_000	MASTER FL - Request For Information (PM1200_000				FL	+ 🖄	
ф	PM1020_STD	RFI Urgent Response Required - STANDARD				FL	+ 🖄	
						+		
								Pro
								All Project

Sample of Report Assignment screen; standard Treeview path: PM > File Maintenance > Report Assignment

In the Report Assignment screen, the **Default** checkbox is used to indicate that the Report is the default to print when the [**Quick Print**] button is clicked on the screen displaying records of the PM object selected via the **Object** field.

The **Merge** checkbox is used to indicate whether any attachments associated with a particular record are to be merged with the default report set to print by the [**Quick Print**] button for the PM object selected via the **Object** field (shown above).

As an example, in the above Report Assignment screenshot, the selected PM object is an **RFI**, and the Report checked as its default is **RFI Urgent Response Needed**. So, the [**Quick Print**] button on the RFI screen displaying individual RFI records (shown in previous screenshot) will generate the **RFI Urgent Response Needed** Report, and if opted, any attachments for the displayed RFI record will be merged to the Report.

Only one Report/Form Letter at a time can have these checkboxes checked. When a **Merge** flag is checked, it makes sense to ensure that the corresponding **Default** flag is also checked.

The Quick Print feature is available for the following PM objects: Communications, Meeting Minutes, RFI's, Issues and Submittals.

Print Reports & Form Letters with Embedded Attachments

Print Single Report/Form Letter with Embedded Attachments

R	equest for Information		Send I/O Email Add Copy Add CC Edit Re	direct Close RFI Add Note Forward Print Report Quick Print Link to Issue Back To Log 📝 🗈 🕯
RFI Deta	ail A	Attachments 🖌	Related Objects	History
	RT No. 0000002 From Drans Pickengel Gr-Author To George Allen OC Skillytt Rukking test cases for V1 Data Created 2016-03-09 Source verdor Question. 1s the environment up	2 environment - COPY to test 1/0 account settings and running?	Select Report - Internet Explorer Select Report - Internet Explorer Multiple form.textracca7785/cmictesh12/5ysReportPepup/showReport Print Multiple form.texter Group By Report Type: Different Letter Coup By Report Type: Diffe	Satus Goen Submitted 2016/03-09 11:11 AM Co-Autor RFI No. Received Change # Crastic Change Link Change Date Required 2016-03-15
	Suggestion Cost Impact Yes Schedule Impact Yes Answered By Date Answered Answere Cost Impact Potentially		Sever Type Tables For all and and a set of all and and a set of all and all an	Cost Amount 150,000.00 Days 6 Cost Amount
Sort	Schedule Impact Potentially Activity		Notes	Days
Sol.	Author: Donna Pickersgill	Date: 2016-03-09 11:13 AM	Internal	

The printing of a single Report or Form Letter via the standard [**Print Report**] button, on screens displaying individual PM object records, has been enhanced to allow user to choose whether or not the attachments associated to the records get appended to the printed Report/Form Letter. This option is available on the pop-up launched via the [**Print Report**] button, as shown above.

Print Options for Embedding Attachments

<i>e</i> Select Report - Inte	rnet Explorer			23	
Attp://test1v12.cm	ic.ca:7785/cmictestv12/SysReportP	opup	/shov	vReport	
Print Multiple Form-Let	ter				
Group By Report Type:]				
Report Name	Request For Information Record \checkmark				
Server Type Jasper Server					
Embed Attachments	Embed Attachments Select Select All None				
	Print Close				

Server Type

<i>e</i> Select Report	- Internet Explorer		
🦉 http://dev4v	10. cmic.ca :7785/cmico	levv10x/SysRepor	tPopup/showRepor
Print Multiple Fo	rm-Letter		
Report Name Server Type	Oracle Report Server Jasper Server Oracle and Jasper Serve	rd ers	~
Embed Attachments	Select Select All	None	
	Print	Close	
]

The **Server Type** is defaulted, based on whether the Report Name that is selected is a Jasper report or an Oracle report. The possible options listed are:

- Oracle Report Server
- Jasper Server
- Oracle and Jasper Servers

If a report can be run via both server types, the **Oracle and Jasper Servers** option will be available. If [**Print**] is clicked at this stage, the next pop-up will allow you to select the print server, via the Print Server field, shown below:

ſ	Request For Information Record - Internet Explorer
	Shttp://custv10xe.cmic.ca:7785/cmicenv2/SysRptParams/acceptRptParams.do?&report
	Descent Config Jasper Server Print Server env2 Destination Preview Name V Format PDF Run Report Close

Embed Attachments - Radio Buttons

Select Report - Internet Explorer	- 0 X
Attp://dev4v10.cmic.ca:7785/cmicdevv10x/SysReportP	opup/showRepor
Print Multiple Form-Letter	
Report Name RFI Urgent Response Required - STANDARD	~
Embed Attachments Select Select All None	
Print Close	

The **Embed Attachments** radio buttons are only active when the report is an ORACLE report (.REP or Form Letter). If it is a Jasper report, these radio buttons are disabled.

The following are details about the **Embed Attachments** options:

Select – When [**Print**] is clicked, a pop-up will display all the attachments associated to the record, allowing the user to select the attachments to include with the Report/Form Letter:

0	🧉 Select Report Attachments - Internet Explorer							
Ø	Attp://custv10xe.cmic.ca:7785/cmicenv2/SysReportPopup/selectEmbeddedAttachmer							
				Cancel Select				
			Select Report At	ttachments				
		Туре	Code	Name				
\$	✓	Attachment	0000001	00-error1				
¢	✓	Attachment	0000002	2uo4212				
¢		Attachment	0000003	A1-1 Site Plan				
¢		Attachment	0000005	equipment cash receipt				
¢	✓	Attachment	0000007	R2LOGO				

- **Select All** Automatically appends all the attachments attached to the current record to the Report.
- **S None** No attachments will be appended to the report, even if there are attachments associated with the current record.

NOTE: The **None** option will always apply to JASPER reports, as they do not yet allow embedding of attachments.

Also, when the **None** option is selected for ORACLE reports, all the standard printing **Destination** options are available:

@ Request For Information	Record - Internet Explorer		
Attp://custv10xe.cmic.c	a:7785/cmicenv2/SysRptPara	ams/acceptRptP	arams.do?&report
	Report Config		
Print Server	env2 🗸		
Destination	Preview		
Name	Preview with Cold Storage Printer		
Format	File E-Mail		
	Fax Cold Storage		
	Preferred Contact Method		

Sorm Letter - Internet Ex	xplorer	
Attp://custv10xe.cmic.c	a:7785/cmicenv2/SysRptParams/	/acceptRptParams.do?&merge
	Report Config	
Print Server Destination Name Format	PDF	
Print Blank Letter		
	Run Report Close	

Otherwise, only the **Destination** options **Preview with attachments** and **E-Mail** are available:

The **Preview with attachments** option displays the Report/Form Letter as a PDF with the attachment(s) at the end.

The **E-Mail** option will send an e-mail with two attachments, shown below: one is a PDF of only the Report/Form Letter, and the other is a PDF of the Report/Form Letter with the attachment(s) appended to the end of it.

Tu	e 3/15/16 11:58	8 AM	
S	tephanie	e@cmic.ca	
R	equest For	Information Record	
То	Stephanie Bro	omfield	
Cc	Stephanie Bro	omfield	
8	Message	🔁 PM3010.pdf (8 KB)	PM3010+attachments.pdf (333 KB)

Print Multiple Form Letters with Embedded Attachments



The **Print Multiple Form-Letter** link, framed above, is used to select one or more Form Letters for printing, and it is used to select one or more attachments (PDF, JPG, PNG, BMP, JPEG, TIFF), associated with the displayed record, to print with the Form Letters.

The following is a	sample of the	e pop-up laund	ched by the Pri	int Multiple Form-	Letter link:

🥖 S	🧟 Select Multiple Form-Letters - Internet Explorer							
0	Shttp://test1v12.cmic.ca:7785/cmictestv12/SysReportPopup/showMultiReportPopup.do?loadNew=new&&objType=PMRFI&							
	Accept Close							
		Se	ect Multiple Form-Letters					
	Туре	Code	Name					
	Request for Information							
	RFI Urgent Response Required							
	Embed Attachments							
-								

The **Embed Attachments** check-box, when checked, indicates that the selected attachments are to be merged into the final document (PDF) comprised of the selected Form Letters. The attachments get appended to the end of the PDF.

After clicking [Accept] on the previous pop-up, the following pop-up is displayed, to select the Form Letters to include in the composite:

@	🧉 Order Multiple Form-Letters - Internet Explorer						
Ø	http://test1v12.cmic.ca:7785/cmictestv12/SysReportPopup/prepareMultiReportOrder.do?&objType=PMRFI&sjwrAppCode=						
				Cancel Save Accept			
			Order Multip	le Form-Letters			
		Туре	Code	Name			
¢	 Image: A set of the set of the	Request for Information	PM1200_001	RFI Urgent Response Needed (PM1200_001)			
¢	\checkmark	Request for Information	PM1200_000	MASTER FL - Request For Information (PM1200_000)			
¢	\checkmark	RFI Urgent Response Required	PM1020_STD	RFI Urgent Response Required - STANDARD			
¢	✓	Attachment	ATT-0001	IMG_0227			

After clicking [Accept] on the previous pop-up, the following pop-up is displayed, to select the final printing parameters, such as **Print Server** and **Destination**.

🦉 Form Letter - Internet Explorer						
Shttp://test1v12.cmic.ca:7785/cmictestv12/SysRptParams/acceptRptParams.do?&mergeReportProcess=true&p_sdr_run_oras						
	Report Config					
Print Server	E-Mail					
Destination	Preview with attachments					
Name						
Format	PDF 🗸					
Print Blank Letter						
Run Report Close						
tun tepore close						

When printing using this enhancement, only the options **Preview with attachments** and **E-Mail** are available as destinations (printing options are available through the web browser displaying the preview).

The preview will display the printed Form Letters with the attachment(s) at the end.

The **E-Mail** option will create an e-mail with two attachments, shown below: one is a PDF of only the Form Letters, and the other is a PDF of the Form Letters with the attachment(s) appended at the end.

Tue 3/15/16 11:45 AM		
stephanie@cmic.c	a	
Printing		
To Stephanie Bromfield		
Cc Stephanie Bromfield		
Message 🔁 SYSRPDOC	.pdf (6 KB)	SYSRPDOC+attachments.pdf (331 KB)

Hiding Text in PDF Documents

Hide Text in PDF (White-Out Text)

Text can be hidden by 'whiting out' certain characters or tags which appear in PDF documents (Oracle Reports or Form Letters).

The new print **Destination**, "**E-Sign – Hide Signature Tags**", has been incorporated for this purpose, and it works with Single Report printing as well as Multiple Form Letter printing.

	Report Config
Print Server	E-Mail
Destination	Preview with attachments
Nan <mark>te</mark>	
Format	PDF 🗸
Print Blank Letter	
	Run Report Close

Note that the **Format** is defaulted as PDF and is not editable for this destination.

The 'white-out' does not apply to any PDF attachments (to the main report).

	ESIGN_TAG_DESCRIPTION	ESIGN_TAG	
1	Signature	 \s{r}\	
2	Initial	 \i{r}\	
3	Date Signed	 \ds{r}\	
4	Full Name	 $fn{r}$	
5	Date	 \d\	
6	Email	 \e{r}\	
7	Envelope ID	 \eid\	
8	FirstName	 \fsn{r}\	
9	LastName	 \lsn{r}\	
10	Email Address	 \ea{r}\	
11	Optional Signature	 \os{r}\	
12	Optional Initial	 \oi{r}\	
13	Signer Attachment	 \sa{r}\	
14	Company	 /c{r}/	
15	Title	 \t{r}\	
16	Approve	 \a{r}\	
17	Decline	 \de{r}\	
18	Note	 \n{r}\	

For E-Sign, the tags that are considered are:

{r} is a sequential number e.g. 1,2,3,4 (e.g. for multiple Signers, with match Date Signed)
 These are DocuSign tags which DocuSign recognizes. When we are print using the E-Sign - Hide Signature Tags option, it is like a translation, so if the document had for instance:

Signer 1:	Dave Brown	Date Signed:	July 1, 2018
Signer 2:	Alex Wek	Date Signed:	Aug. 2, 2018

Substituting the DocuSign tags in the Form Letter definition before printing the document, in order to 'whiteout' or not show the data would be:

Signer 1: \s1\	Date Signed: \ds1\
Signer 2: \s2\	Date Signed: \ds2\

An example on how to use the tags to achieve the 'white-out' is outlined below:

1. Modify Form Letter Definition to include tags. For example:

Action Edit Block Field Record Query Utility Help Window		
ⓑ‱∎⊮₩♥~♥≥≥≥₽₽	💩 🖄 + ∢ ▶ ∔ ∢ ▶ 🤻 ? 📑 📴 🕄 🧮	
🙀 System Tables Maintenance - TESTV10_X 🛛 Form Letters		
Document Type	.etter Format	
Application PM Project Management Letter Type FLPM3110 Potential Change Item	Code Description PCI Potential Change Item PCI% copy of standard PCI FL TSTSAMPLE Test for Status Last Updated (PM3110)	Active Format >> Advanced • H F · Advanced • H F · Advanced • H F ·
Font Default	n V Align Left V Type Text V Box Shade	Available Values
Row: Shade I top Right Bottom Left Lin	e Between Columns Page Protect Style Bold	Source: FLPM3110_V < Action Code
Order Section # Section Type Detail Data Source		< Aprv Flag
10 Text 🔽 🔽 .	Define Relation/Order BY Break Groups Page Break Before	< Arch Add Line1
		< Arch Add Line2
		< Arch Add Line3
< <da.flpm311u_v.cmocn_iiile>></da.flpm311u_v.cmocn_iiile>		< Arch Cont Name
Signer: \s1\ Date Signed: \ds1\		< Arch Contact Desc
		< Arch Contact Title
Date Status Last Updated: < <da.flpm3110_v.fl3110_stat_code_update< td=""><td>E_DATE>></td><td>< Arch Country</td></da.flpm3110_v.fl3110_stat_code_update<>	E_DATE>>	< Arch Country
		< Arch Email
Classifiers:		< Arch Fax Num
CLS1: < <da.flpm3110_v.fl3110_clv_value_code1>></da.flpm3110_v.fl3110_clv_value_code1>		< Arch Mobile Num
CLS2: < <da.flpm3110_v.fl3110_clv_value_code2>></da.flpm3110_v.fl3110_clv_value_code2>		< Arch Other
CLS4: < <da.flpm3110 clv="" code4="" v.fl3110="" value="">></da.flpm3110>		Arch Perfor Num
CLS5: < <da.flpm3110_v.fl3110_clv_value_code5>></da.flpm3110_v.fl3110_clv_value_code5>		Archinagen Num
CLS6: < <da.flpm3110_v.fl3110_clv_value_code6>></da.flpm3110_v.fl3110_clv_value_code6>	Τ	< Arch Partn Name
	*	< Arch Phone Num

2. Print preview the Form Letter (if using DOCX use 'No Template'):



3. Print the Form Letter again, using the **E-Sign Hide Signature tags option...**the tags area in the Form Letter should be white.



Converting DOCX to PDF When Printing Documents

SETUP

1) LibreOffice Installation - Apache LibreOffice is used to convert DOCX files to PDFs. It is a manual installation, to the following location:

{cmHome}\{version}\{environment}\sql\LibreOffice

(ex. D:\cm\v10\prod\sql\LibreOffice)

NOTE: Changes are not available for Unix.

2) LibreOffice license link:

https://www.libreoffice.org/about-us/licenses/

RULES

To convert an MS Word DOCX file to PDF, the following rules apply:

- I. DOCX template must not be in compatibility mode on MS Word 2016
- II. For layout, use tables, otherwise there will be a misalignment issue and CMiC will not be supporting this.
- III. Use of MS Word Objects can result in a conversion failure. Please avoid using MS Word Objects as CMiC will not support conversion issues related to them.

FEATURE DESCRIPTION

This feature allows the user to print a DOCX file as a PDF rather than only as a DOCX, the only option which was available in CMiC up to this point.

When printing a Form Letter based on a DOCX template the available destinations are "Preview" and "Email".

When "Email" is selected, the Email popup offers additional format options: PDF or DOCX. Below are sample screenshots for a possible path to printing a PDF from a DOCX report. First, select the DOCX report from the reports list when the [**Print Report**] button is clicked:

Request for Informatio	n	LiveCycle RFI Send I/O En	vail Add Copy Add CC Edit Redirect Del	ete Close RFI Add Note Forward Print Report Q	uick Print Link to Issue Back To	Log 🕻 🖬 🏫
🕸 🗉 🗄 Project Management Menu	RFI Detail	Attachments	Related Objects		History	^
Sendi Communication Management Project 59 Project - Trode Phase 1 (SPPA) Communication Management Project Control Decitory Project Control Decitory Communications Commu	NT No. 005 Pron. Stephane Bronfiel Co-Autor To Ferris Bueller CC Subject F50 - conversion o Date Oreation No further quests Suggestion Cost Impact Totestially Solvabil Impact Protectially Solvabil Impact Protectially Date Answerd Answerd Answerd Schedularguet Protectially Schedularguet Protectially Schedularguet Protectially Schedularguet Protectially Activity	s f. door to JPF f. door to JPF Select Report - Internet Explorer Mtp://cuth/doix.emic.ca/785/cmic Print Multiple Form-Letter Group by Report Type: Template GridLip Jacobo Serier Type (Total Reports Serier Typ	cenu2 SysReportPopupi (showReport) cenu2 SysReport	Cost Amount Days Cost Amount Days		

Next, select the **Destination** and **Format** on the Report Config popup window:

Request for Information	n	LiveCycle RFI Send 1/O Email Add (Copy Add CC Edit Redirect Delete Close I	RFI Add Note Forward Print Report Qu	akk Print Link to Issue Back To Log 🛛 🕻 🖍
🕸 🗉 🗉 Project Management Menu	RFI Detail Attachments		Related Objects		History
Sandt Communication Merogenerat Communication Merogenerat Communication Merogenerat Project Context Detectory Project Context Detectory Projectory Project Context Detectory Project Context Detectory Pro	BFT No. 005 From Stephane Boonheld Car-Author To Terma Bueller CC. Subject F203 - convention of docs to PDF Date Context 2016-06-13 Source Question No further questions Supportion Cost Impact: Totestially Schedule Timpact: Totestially Answerd By Date Answerd Answerd Cost Impact: Totestially Schedule Timpact: Totestially Schedule Timpact: Totestially Schedule Timpact: Totestially Schedule Timpact: Totestially Schedule Timpact: Totestially	SYSRPDOC. Form Letter - Internet Explored typ://cuth/lose.cmic.ca.2785/cmic.em/2/598 Peter Server em/2 Peter Server em/2 P	Co-Ku Du pr/Farams/accept/tip/Farams.do12kembe No Close	Statuted Care Submitted Care Submitted Care Care Care Care Care Care Care Care	

DI		LiveCycle RFI Send I/O Email Add Co	opy Add CC Edit Redirect Delete Close RFI Add Note Forward Pri	nt Report Quick Print Link to Issue Back To Log 🏼 🕻	i 🗈 🍙
	RFI Detail Attachments 🗸		Related Objects	History	/
,	FIT No. 0005 From Stephanie Bromfield CC-4-ution To Ferris Bueller CC Subject. FISD - conversion of .doc; to .PDF		(영) Stutus Open Submitted 전 2016-06-13 1 Co-Author PR No. Received Change # <u>Orasta Change</u>	Ji20 AM	
	Date Created 2016-06-13 Source Question No further questions Suggestion Cost Impact Potentially Answered Dy Date Answered Answered Cost Impact Potentially Schedule Impact Potentially Schedule Impact Potentially Activity	SYSRPDOC: Form Letter - Internet Explorer The Internet Explored System Report Confi Print Server (m/2) Destination Preview (m/2) Print Bank Latter Rum Report (m/2)	Dete Required 2016-06-13		

When the Destination is 'Preview', you can chose the Format as either DOCX or PDF.

PDF will display the DOCX as a PDF document. DOCX will display the DOCX in its unconverted format (as per original functionality).

When the Destination is set to 'Email' the **Email Information** screen is displayed with the ability to select the Format. In this screen you can select the PDF format for the DOCX report. You can also select any attachments you want to have accompany the main report.

			Check Spelling	Back	Send				
	Email Information								
From	From stephanie@cmic.ca								
То	"Ferris Bueller" <stephani< td=""><td>e@cmic.ca></td><td></td><td></td><td></td></stephani<>	e@cmic.ca>							
				_ A					
CC									
				~					
				_ A					
BCC									
				~					
Subject	RFI Document								
	RFI Doc Merge document printed as PDF								
Message									
				\sim					
Ward Templete Fermet	DOCX								
Word Template Format	PUP								
Report File Name	MAIN.pdf								
Attachments									
Document Name			File Name		✓				
00-error1	00	-error1.jpeg			\checkmark				
2uo4212	2u	io4212.png			\checkmark				
	I								

Select PDF then click [**Send**], and the resulting e-mail that is sent will have the DOCX report converted to a PDF:



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Н	
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