
User Guide

FS03 - Enhanced Printing v10x

By CMiC

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Computer Methods
international Corp.

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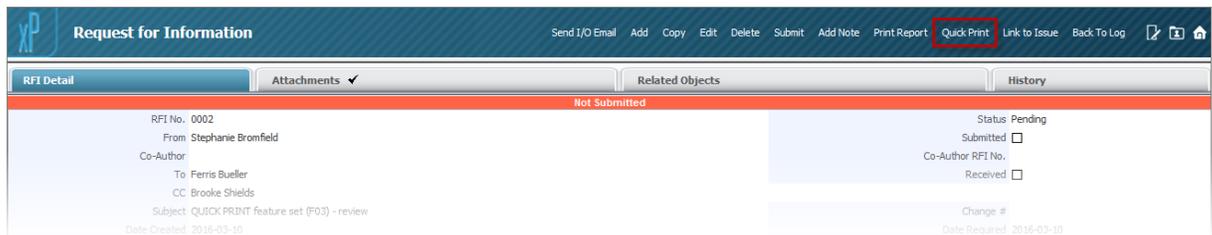
Feature Set 03 – Enhanced Printing

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

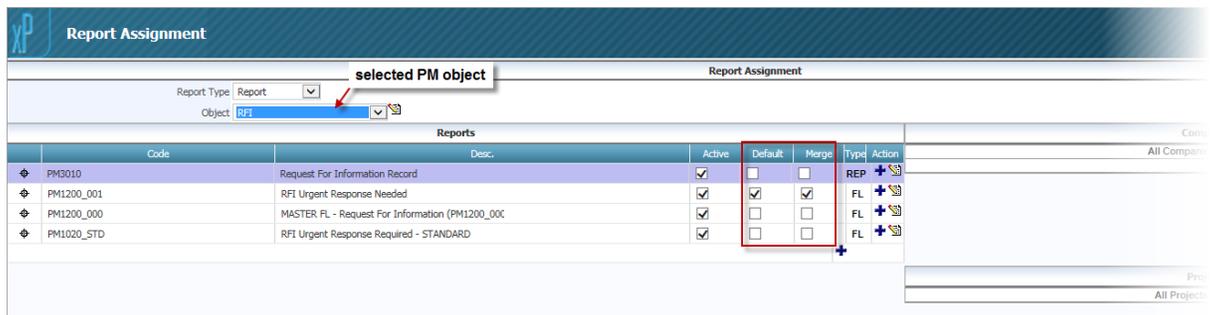
Overview – Quick Print



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



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).

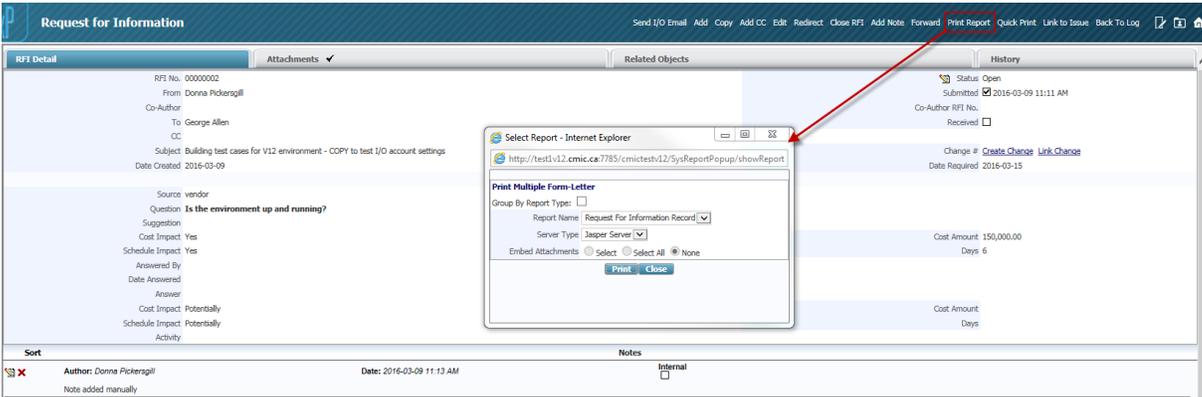
As an example, in the above Report Assignment screenshot, the selected PM object is an **RFI**, and the Report checked as its default is **RFI Urgent Response Needed**. So, the [**Quick Print**] button on the RFI screen displaying individual RFI records (shown in previous screenshot) will generate the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

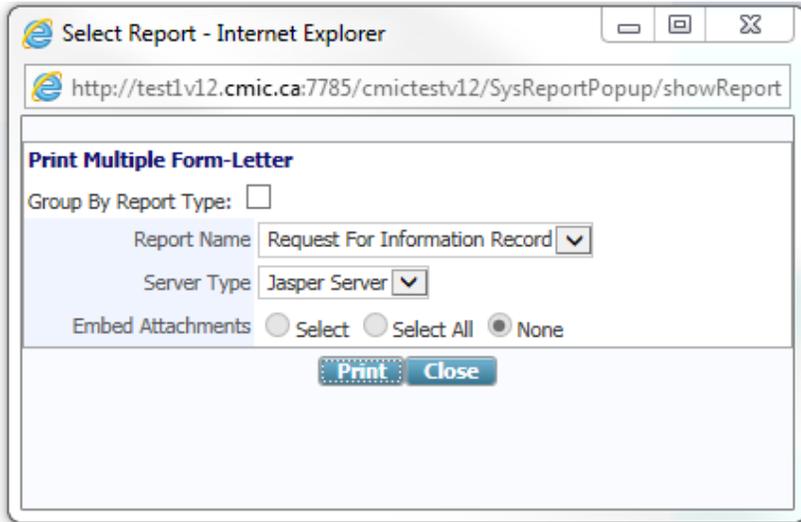
Print Reports & Form Letters with Embedded Attachments

Print Single Report/Form Letter with Embedded Attachments

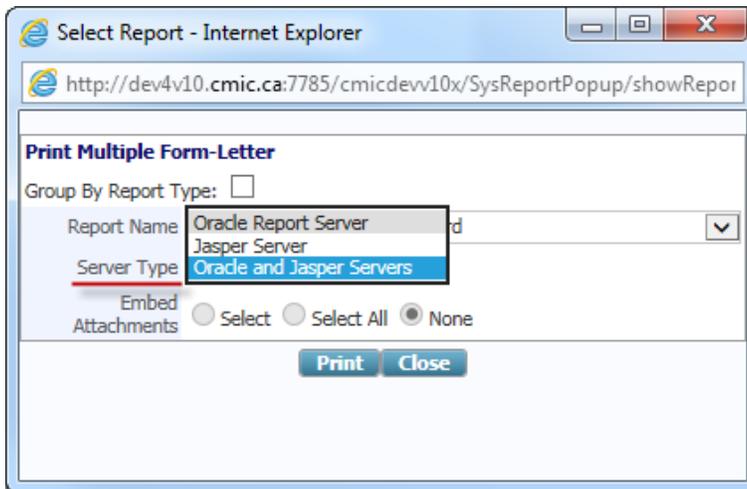


The printing of a single Report or Form Letter via the standard [**Print Report**] button, on screens displaying individual PM object records, has been enhanced to allow user to choose whether or not the attachments associated to the records get appended to the printed Report/Form Letter. This option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

Print Options for Embedding Attachments



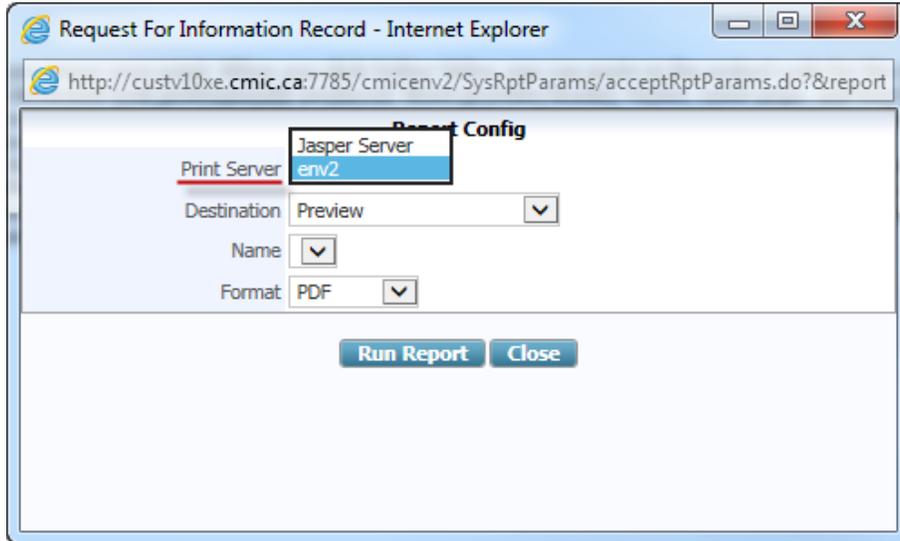
Server Type



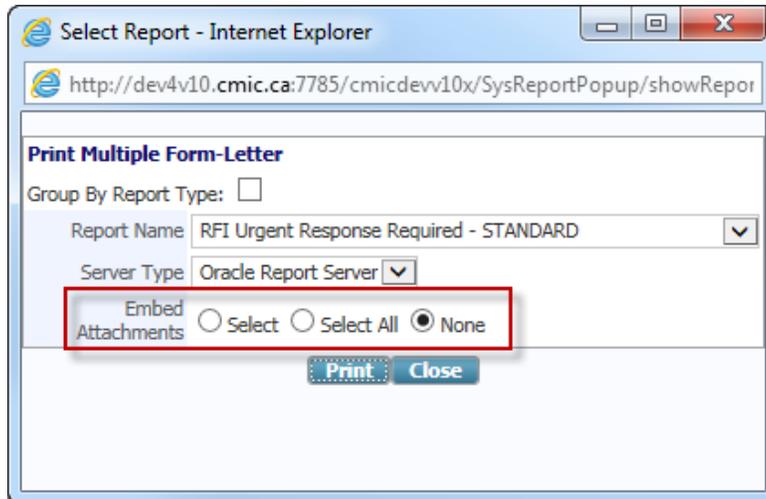
The **Server Type** is defaulted, based on whether the Report Name that is selected is a Jasper report or an Oracle report. The possible options listed are:

- 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:



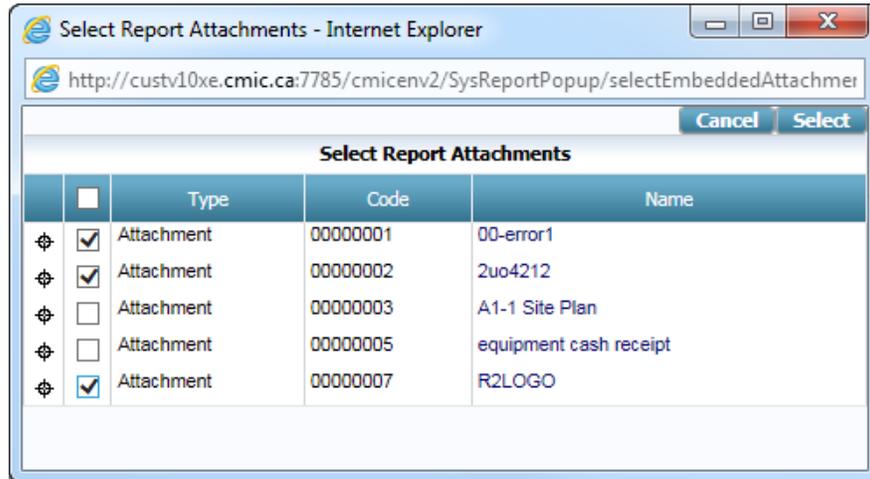
Embed Attachments – Radio Buttons



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:

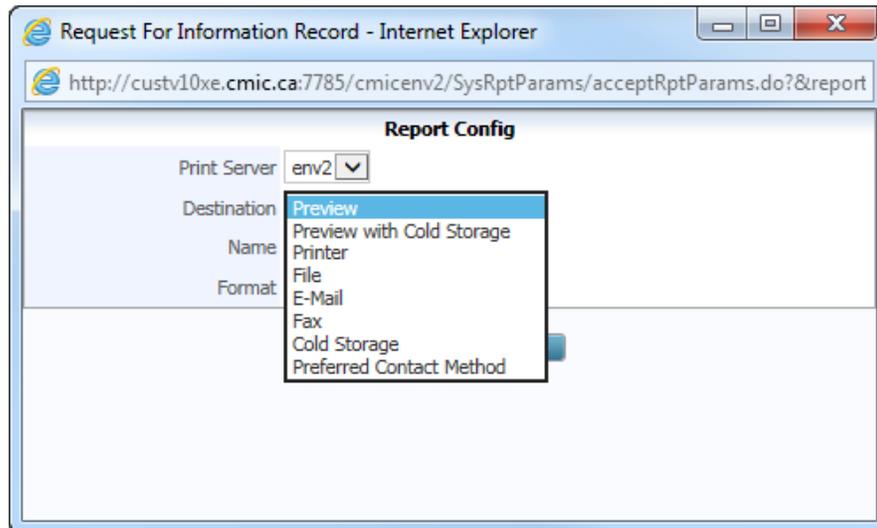
- § **Select** – When **[Print]** is clicked, a pop-up will display all the attachments associated to the record, allowing the user to select the attachments to include with the Report/Form Letter:



- § **Select All** – Automatically appends all the attachments attached to the current record to the Report.
- § **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:



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

The screenshot shows a web browser window titled "Form Letter - Internet Explorer". The address bar contains the URL: <http://custv10xe.cmic.ca:7785/cmicensv2/SysRptParams/acceptRptParams.do?&merge>. The main content area is titled "Report Config" and contains the following fields:

- Print Server:
- Destination: **E-Mail** (selected), **Preview with attachments** (highlighted)
- Name:
- Format: PDF (selected)
- Print Blank Letter:

At the bottom of the form are two buttons: "Run Report" and "Close".

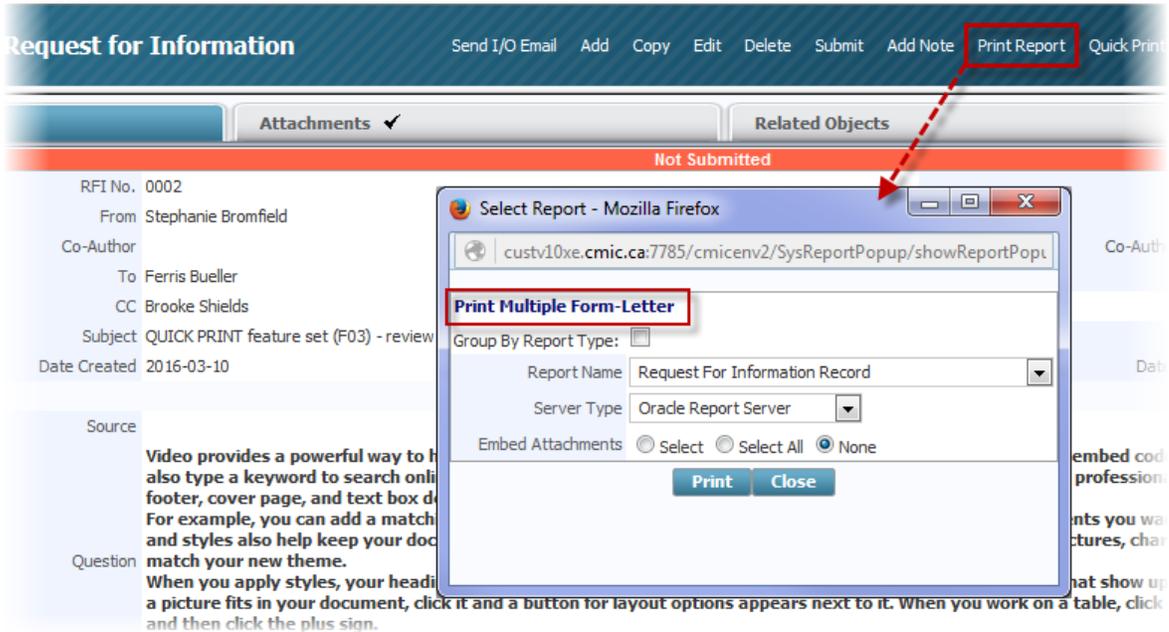
The **Preview with attachments** option displays the Report/Form Letter as a PDF with the attachment(s) at the end.

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.

The screenshot shows an email interface with the following details:

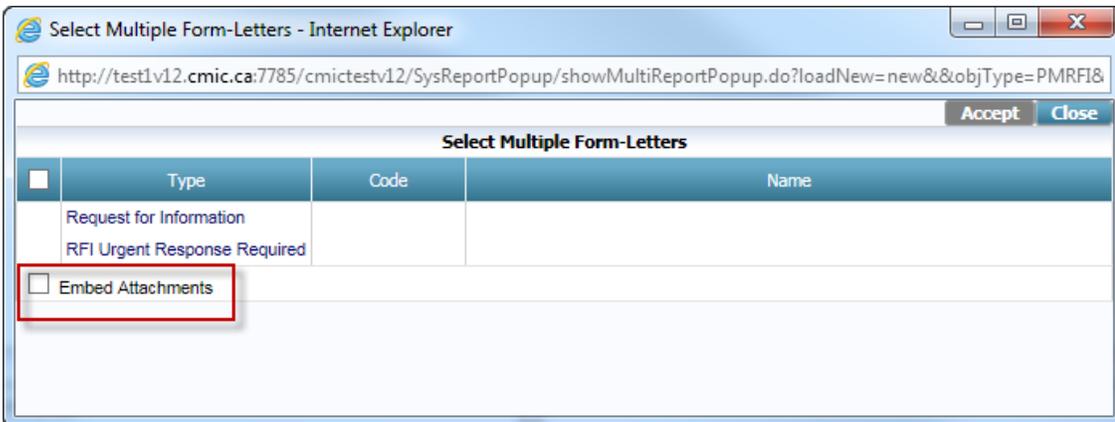
- Date: Tue 3/15/16 11:58 AM
- From: stephanie@cmic.ca
- Subject: Request For Information Record
- To: Stephanie Bromfield
- Cc: Stephanie Bromfield
- Attachments: Message, PM3010.pdf (8 KB), PM3010+ attachments.pdf (333 KB)
- Body: Single Oracle Report with all attachments

Print Multiple Form Letters with Embedded Attachments



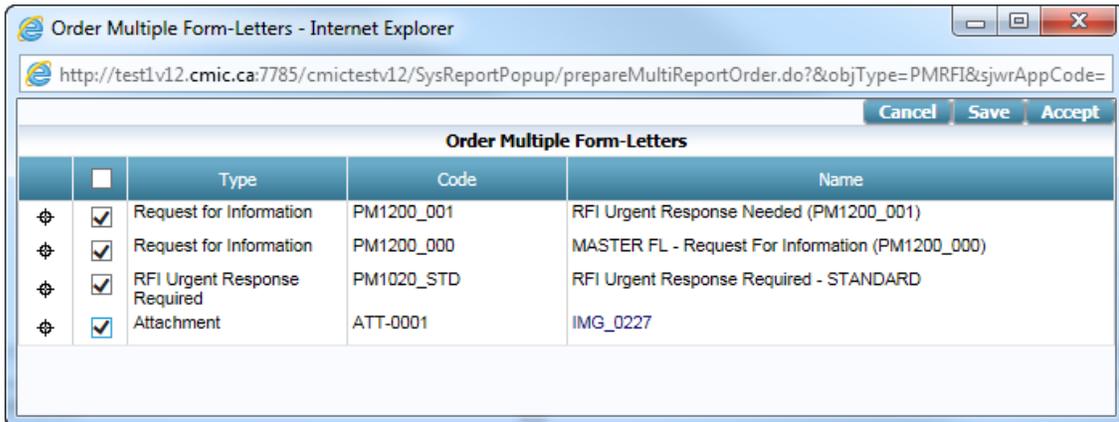
The **Print Multiple Form-Letter** link, framed above, is used to select one or more Form Letters for printing, and it is used to select one or more attachments (PDF, JPG, PNG, BMP, JPEG, TIFF), associated with the displayed record, to print with the Form Letters.

The following is a sample of the pop-up launched by the **Print Multiple Form-Letter** link:

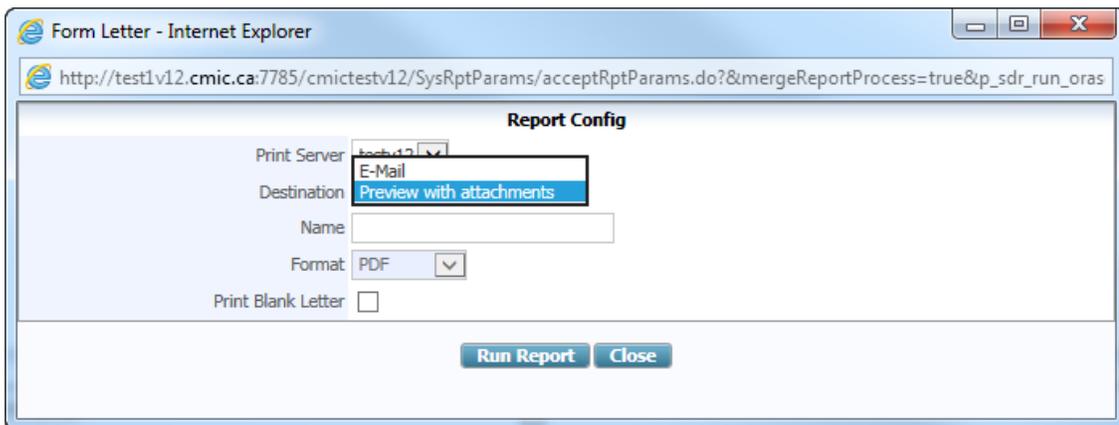


The **Embed Attachments** check-box, when checked, indicates that the selected attachments are to be merged into the final document (PDF) comprised of the selected Form Letters. The attachments get appended to the end of the PDF.

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



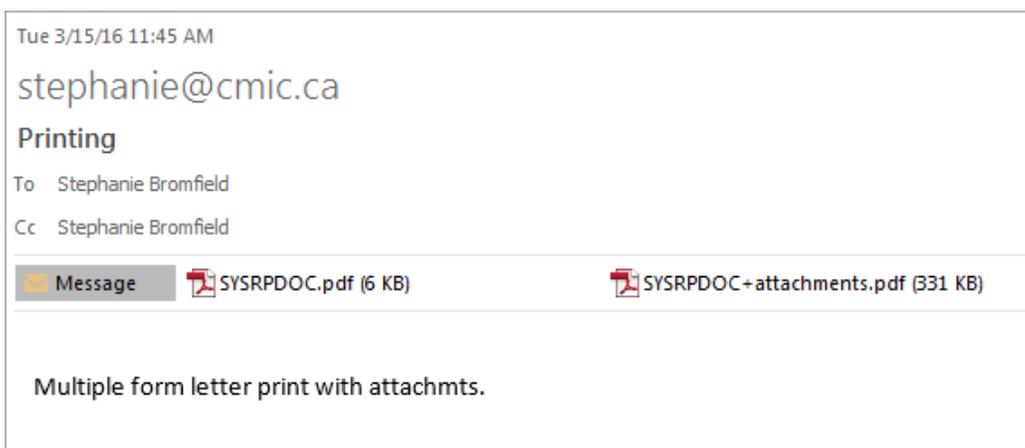
After clicking [**Accept**] on the previous pop-up, the following pop-up is displayed, to select the final printing parameters, such as **Print Server** and **Destination**.



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.

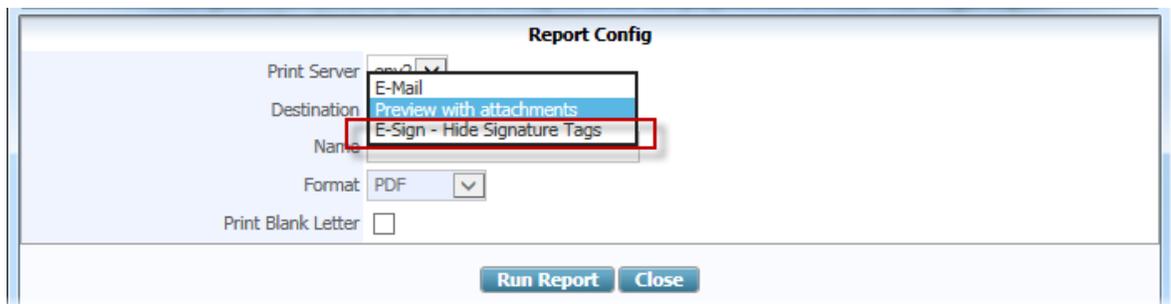


Hiding Text in PDF Documents

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.



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).

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

	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	First Name	\fsn{r}
9	Last Name	\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}

{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:

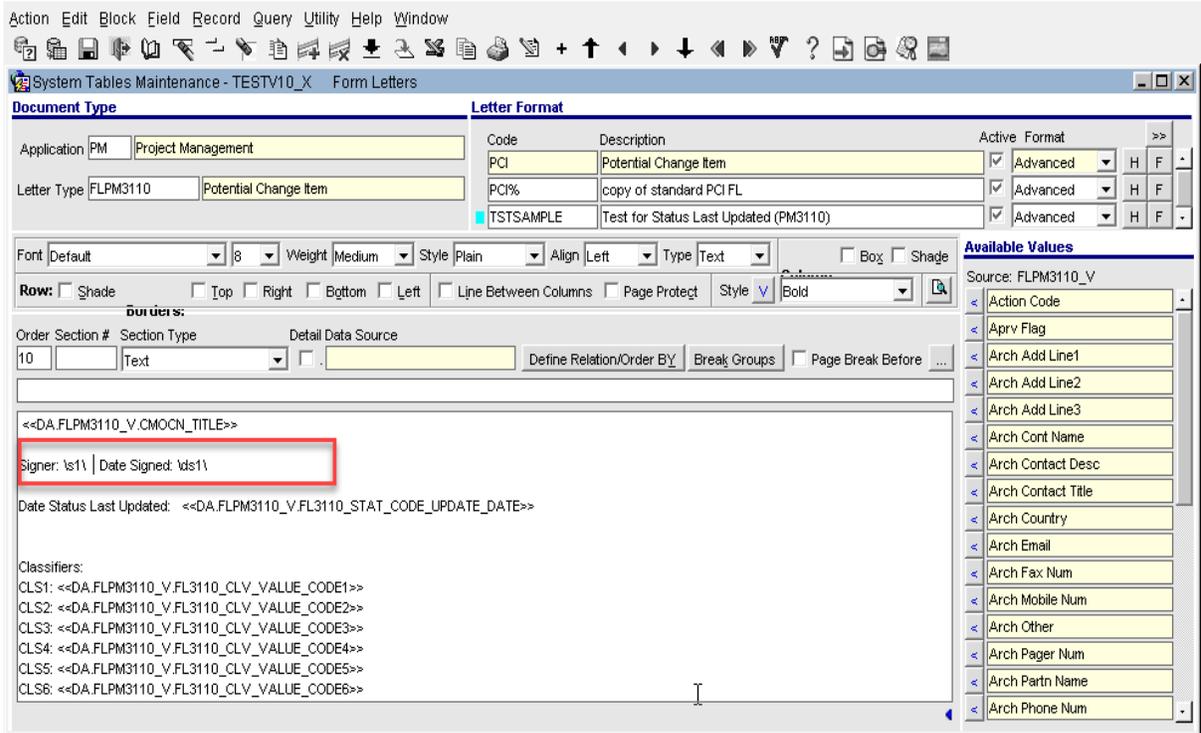
Signer 1: Dave Brown Date Signed: July 1, 2018
Signer 2: Alex Wek Date Signed: Aug. 2, 2018

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

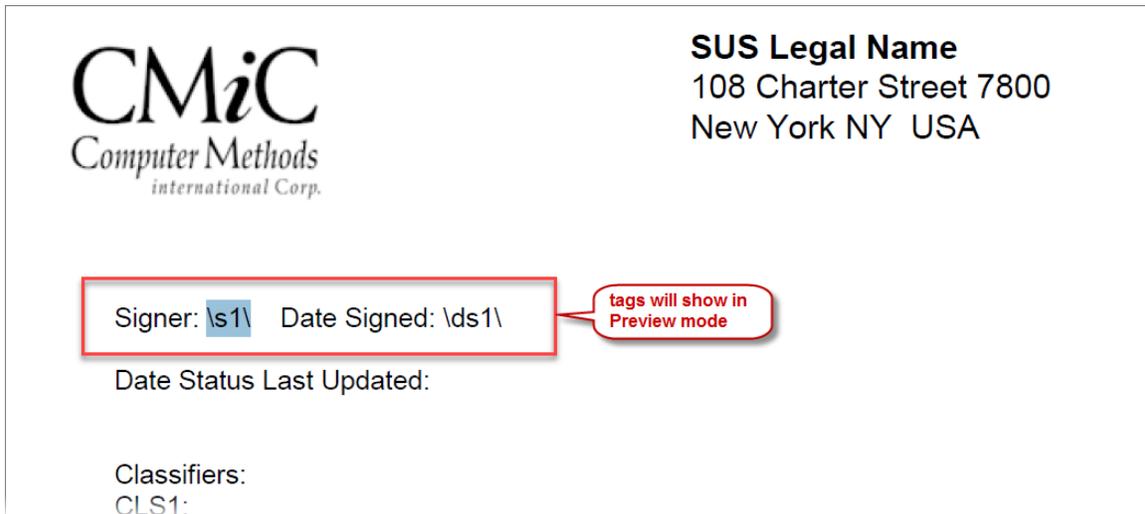
Signer 1: \s1 Date Signed: \ds1
Signer 2: \s2 Date Signed: \ds2

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:



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

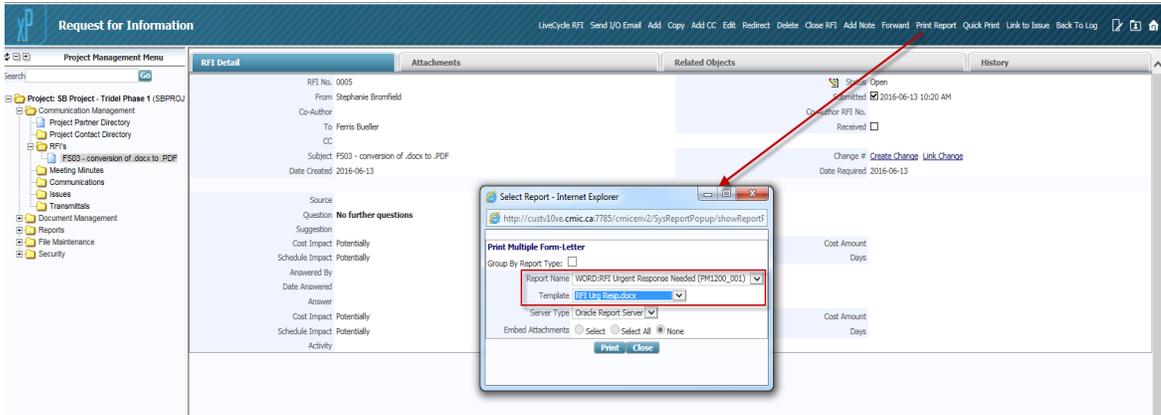
This feature allows the user to print a DOCX file as a PDF rather than only as a DOCX, the only option which was available in CMiC up to this point.

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

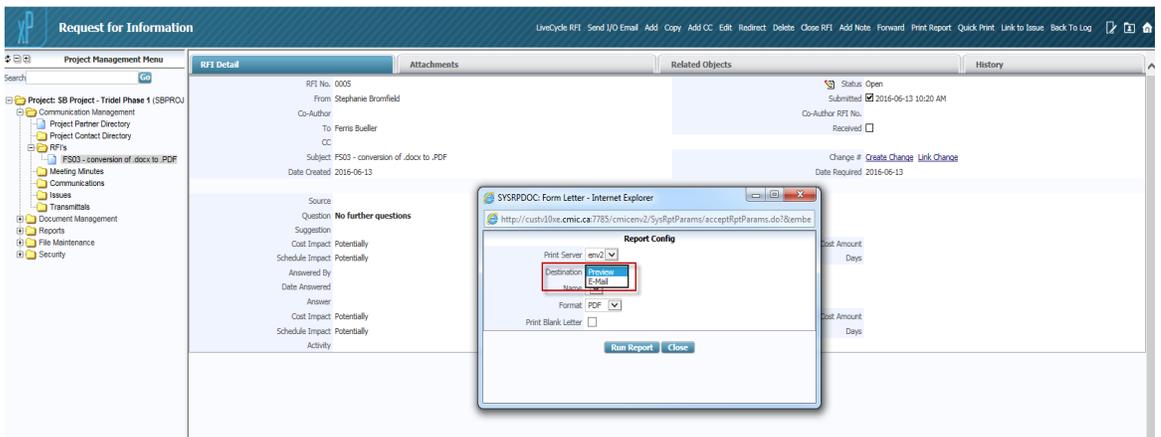
When “Email” is selected, the Email popup offers additional format options: PDF or DOCX.

Below are sample screenshots for a possible path to printing a PDF from a DOCX report.

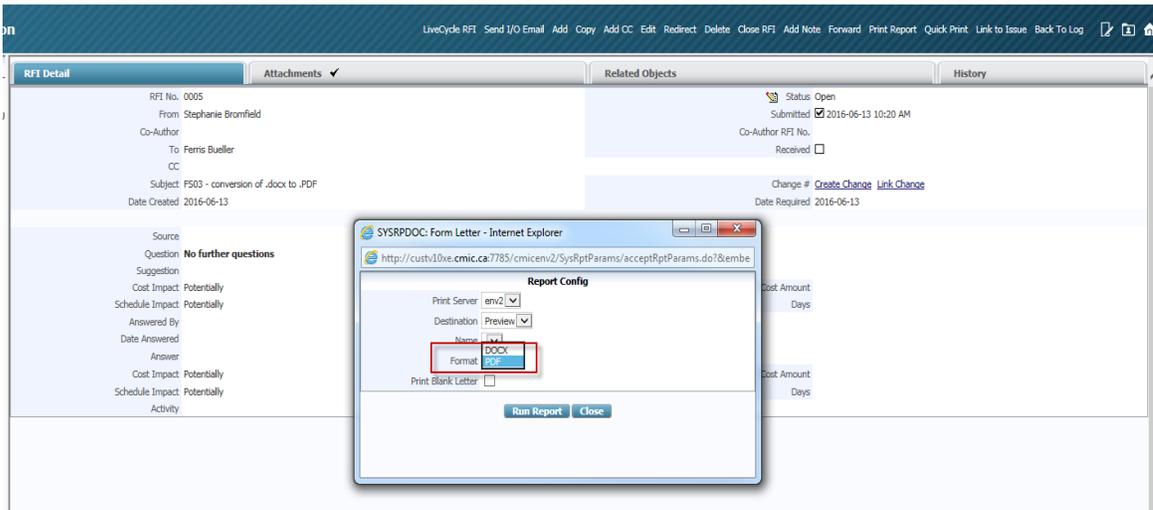
First, select the DOCX report from the reports list when the **[Print Report]** button is clicked:



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

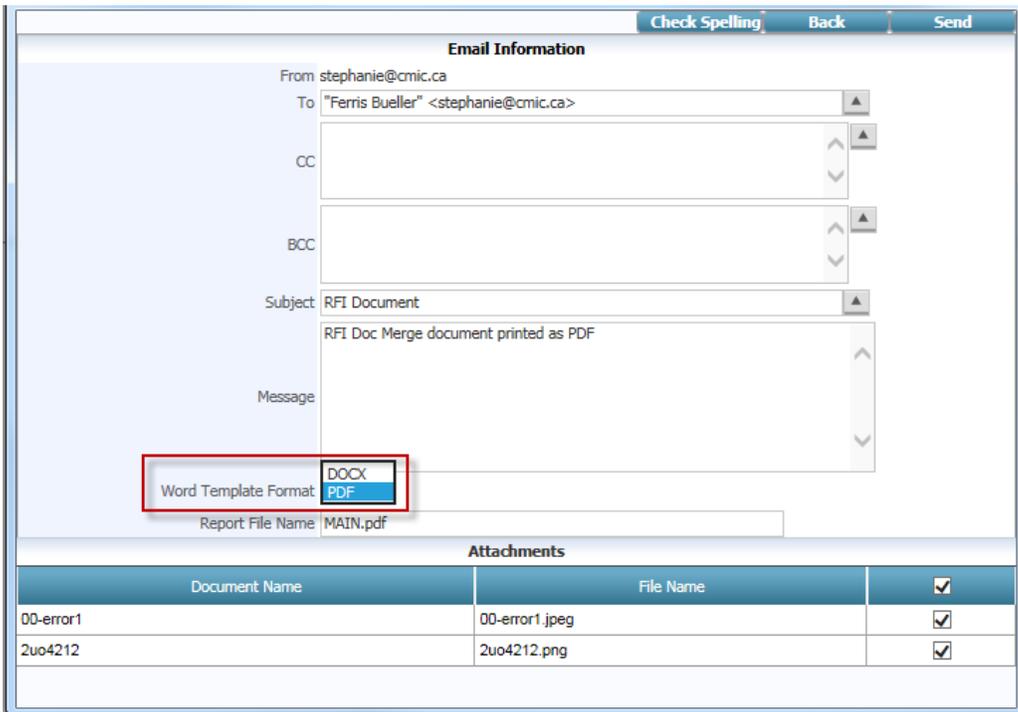


When the Destination is 'Preview', you can chose the Format as either DOCX or PDF.

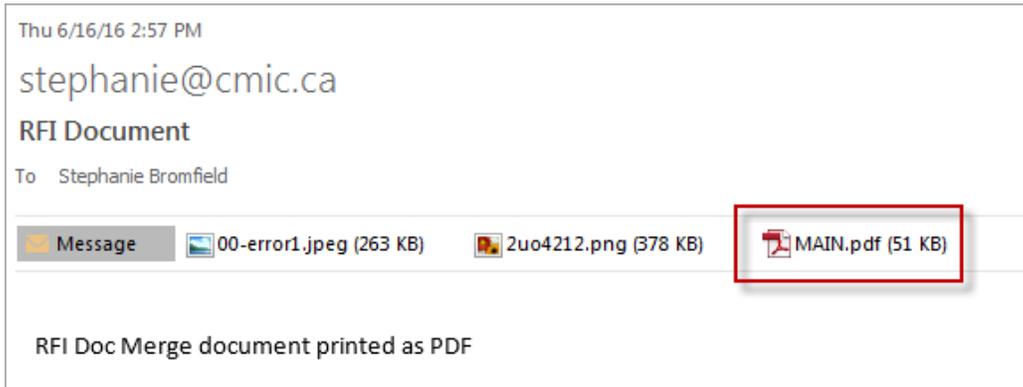


PDF will display the DOCX as a PDF document. DOCX will display the DOCX in its unconverted format (as per original functionality).

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.



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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