

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



Version 8.7.0

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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)

Requirements

8.7.0 OPENworkshop/Report-IV must be installed prior to installing 8.7.0 Report-IV to PDF. If you have not already done this do not continue with this installation.

Supported platforms are Windows XP, Windows Server 2000, Windows Server 2003, Windows Vista, Windows Server 2008, Windows 7, Linux, SCO, HP-UX, and AIX.

Overview

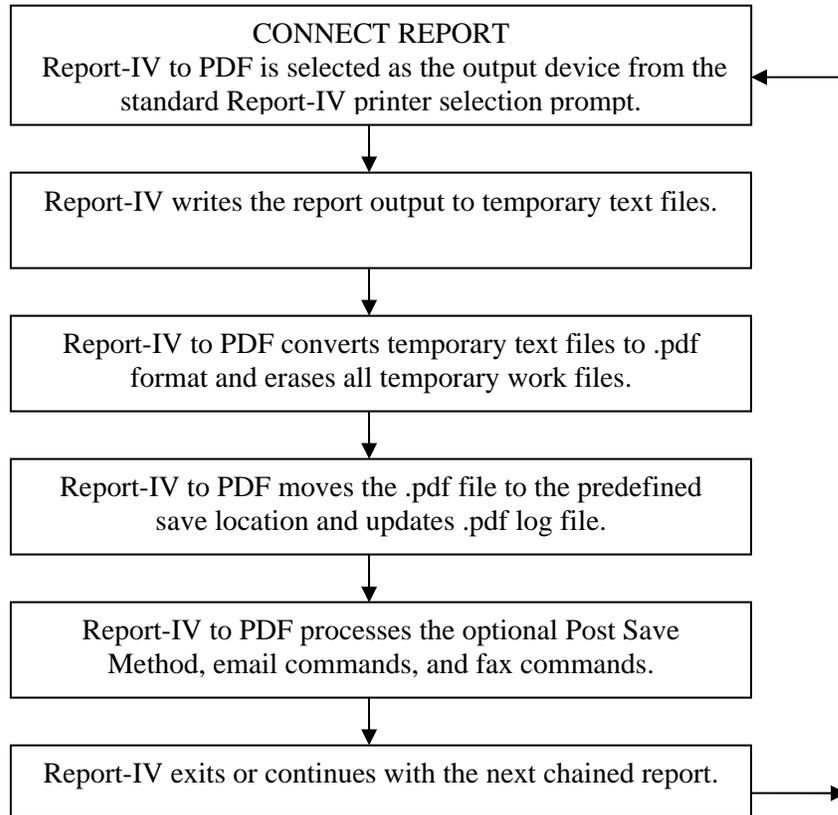
Features

Report-IV to PDF extends the capabilities of Report-IV allowing you to save your reports as .pdf files.

- Convert Report-IV output to PDF by selecting a printer device from the standard Report-IV printer selection prompt.
- Easily configured from the Settings and Options screen.
- Supports background images which are merged with the Report-IV data to create forms.
- Email the .pdf file as an attachment using simple email options or by executing an email Method.
- Fax the .pdf file using simple fax options or by executing a Fax Method.
- Execute a custom Post Save Method when custom processing of the .pdf file is required.
- View archived .pdf files with support for deleting, renaming, emailing and faxing a selected file.

System Architecture

The following diagram outlines the Report-IV to PDF process:



To ensure proper write permissions, all temporary text files are created in the directory defined by Link UTDATFIL (#IDSV.DISK-NBR-DATAFILES). If this directory is defined in the IPL file with the *subdirflg* set, the USR directory must exist. All temporary files will be created in the USR directory. Solution-IV installations typically have the *subdirflg* set for the UTDATFIL directory. For more information on UTDATFIL please refer to the Dictionary-IV Administrator Guide.

When the conversion process is complete, the .pdf file will be moved to the directory defined by the Settings and Options: path to saved .pdf files. Once saved, your applications can perform additional processing on the .pdf file through a custom Post Save Method, email, or fax commands.

Global format #OOFPDF1 is used to maintain information about the Report-IV to PDF environment. In some cases information is typically static, for example the location for saved .pdf files. The values for these global elements are maintained by the Report-IV to PDF Settings and Options configuration screen and are documented in the Configure Settings and Options section of this manual. Other global elements are dynamic in nature and are used to pass arguments to the Report-IV to PDF run time environment. These are documented in the Using Report-IV to PDF section of this manual.

INSTALLATION

Windows Server 2000/Windows XP/Windows Server 2003/Windows Vista/Windows Server 2008/Windows 7

All installations and activations must be run with Administrator privileges. Once fully installed and activated the products can be run using standard user accounts.

If you are installing on Windows Server running Terminal Services in application mode, switch to Install Mode prior to running setup.exe.

- To set Install Mode, from a command line enter **chgusr /INSTALL**.
- After completing the install, switch back to Execute Mode. From a command line enter **chgusr /EXECUTE**.
- At any time, the current mode can be verified with **chgusr /QUERY**.

The chgusr command is a Terminal Services tool. For more information regarding installing applications with Terminal Services, please refer to Microsoft documentation.

1. **Login** using an **Administrator** account.
2. We **recommend closing all unnecessary applications** before running the install.
3. **Insert the 8.7.0 Report-IV to PDF CD. Browse the CD and run setup.** There is one setup.exe for all the supported window platforms: Windows XP/Windows Server 2000/Windows Server 2003/Windows Vista/Windows Server 2008/Windows 7.
4. The **InstallShield Wizard** will start the installation process. You can exit this installation at anytime by selecting the **Cancel** button.

This will install the Report-IV to PDF driver (rpt4pdf.exe). By default this will install rpt4pdf.exe to C:\Program Files\Report4PDF. We strongly recommend installing into the default directory.

The setup will also extract the Report-IV to PDF merge files to your existing OPENworkshop IDL4 directory. The setup will automatically determine the path to your installation on the target system.

If it cannot, an error message is displayed and the setup must be terminated. Please install or re-install OPENworkshop including Report-IV 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 OPENworkshop folder names or their locations have been manually modified. It can also be an indication that there is more than one installation 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.

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 cdrfs /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 must be extracted into a directory that can be made accessible to your existing OPENworkshop/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 -icvBmud <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.

2 *Extract and Install the Linux email 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 email 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 OPENworkshop/Report-IV installation. These are provided in cpio format.

```

aix/870
hp/870
linux/870
sco/870

```

The following example assumes the CD has already been mounted using mountpoint cdrom. It will extract the merge files from the sco directory on the media to /usr/basic870/IDL4 on a **SCO** system.

1. cd /usr/basic870/IDL4
2. cpio -icvBmud </cdrom/sco/870

Note: cdrom is the mountpoint name.

Merge Report-IV to PDF with OPENworkshop/Report-IV

The following applies to all operating systems.

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

On Windows Vista/Windows Server 2008/Windows 7 the IPLINPUT file is located in Thoroughbred common data directory. The default is C:\ProgramData\Thoroughbred Software\Tbsc.

On Windows Server 2000/Windows XP/Windows Server 2003 the IPLINPUT file is located in the Basic directory. The default is C:\Program Files\Tbsc.

On Linux, SCO, AIX, HP-UX the IPLINPUT file is located in the Basic directory.

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, Dictionary-IV definitions and the PDFCNV printer table.

When the Installation Complete screen is displayed press **Enter** to continue with the final phase of the install process. The Report-IV to PDF Settings and Options configuration screen is displayed. To skip configuring Report-IV to PDF, press **F4**. 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. It is strongly recommended that you configure Report-IV to PDF at this point. For more information see Configure the Settings and Options section of this manual.

In order to select Report-IV to PDF as the printer device the PDFCNV printer table must first be assigned to a printer device. From the OPENworkshop **System Administration** menu, select **Printer Assignment**. Assign the printer table **PDFCNV** to the null printer device specified in your IPLINPUT file.

Using printer device RC as an example, when **RC** is selected for output from the Report-IV Select Printer prompt, the report 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 defined by Link OOLPDF1. The global format #OOFPDF1 is populated with the saved settings and options.

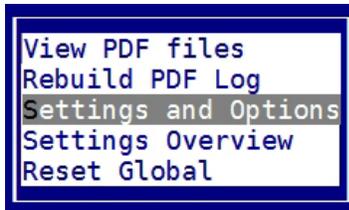
For example when OPENworkshop is run #OOFPDF1.POST-SAVE-METHOD is set to the default value for the Post Save Method defined in the Settings and Options screen. If a particular report requires a different Post Save Method you can override the default value for #OOFPDF1.POST-SAVE-METHOD at run time in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

```
LET DFLTMN$ = #OOFPDF1.POST-SAVE-METHOD,           ! save the default
#OOFPDF1.POST-SAVE-METHOD = alternate_method_name ! override the default
CONNECT REPORT report_name                          ! execute the report
LET #OOFPDF1.POST-SAVE-METHOD = DFLTMN$           ! restore the default
```

Once changed, the default values will not be reset until the global format is initialized. Depending upon your application, it may be necessary to restore the default values in your application code. For more information on resetting all the global defaults, see Reset Globals covered later in this document.

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.

The Settings and Options screen is displayed automatically by the installation process or can be accessed at any time from the main OPENworkshop menu. Select **Utilities** and then select **Report-IV to PDF Utilities**.



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
User supplied PDF name enabled: N
Post save method enabled: N Method name:

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

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

Path to PDF converter

Full path name of the directory containing the rpt4pdf driver.

- Defined by global: #OOFPDF1.PDF-PATH
- Required or optional: required
- Maximum size: 80 bytes
- Default value: If not set the default path for Linux, UNIX, SCO and AIX installations is *<basic-install-path>/PDFConverter*. The default path for Windows installations is C:\Program Files\Report4PDF.

REMARKS

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

EXAMPLE

usr/basic/PDFConverter
C:\Program Files\PDFConverter

Path to saved PDF files

Full path name of the directory where the .pdf files are to be saved.

- Defined by global: #OOFPDF1.RPT-PATH
- Required or optional: required
- Maximum size: 80 bytes
- Default value: If not set the directory defined by Link UTDATFIL (#IDSV.DISK-NBR-DATAFILES) will be used. For more information on UTDATFIL please refer to the Dictionary-IV Administrator Guide.

REMARKS

This directory must have read and write permissions.

If the selected save directory is defined in the IPL file with the *subdirflg* set, the USR directory must exist. In this case the .pdf files will be saved in the USR directory. Most Solution-IV installations have the *subdirflg* set for the UTDATFIL/#IDSV.DISK-NBR-DATAFILES directory.

EXAMPLES

```
/public/PDFOut  
/usr/basic/SOL4/USR  
C:\PDFOut  
C:\Program Files\Tbrc\SOL4\USR  
C:\ProgramData\Thoroughbred Software\Tbrc\SOL4\USR
```

Path to Background .pdf files

Full path name of the directory where the .pdf background files are located.

- Defined by global: #OOFPDF1.BACKPG-PATH
- Required or optional: optional
- Maximum size: 80 bytes
- Default value: none

REMARKS

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.

EXAMPLES

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

See Using Report-IV to PDF below for more details and an example.

User supplied PDF name enabled

When enabled the user will be prompted to enter a name for the .pdf file. When disabled the default .pdf file name will be used.

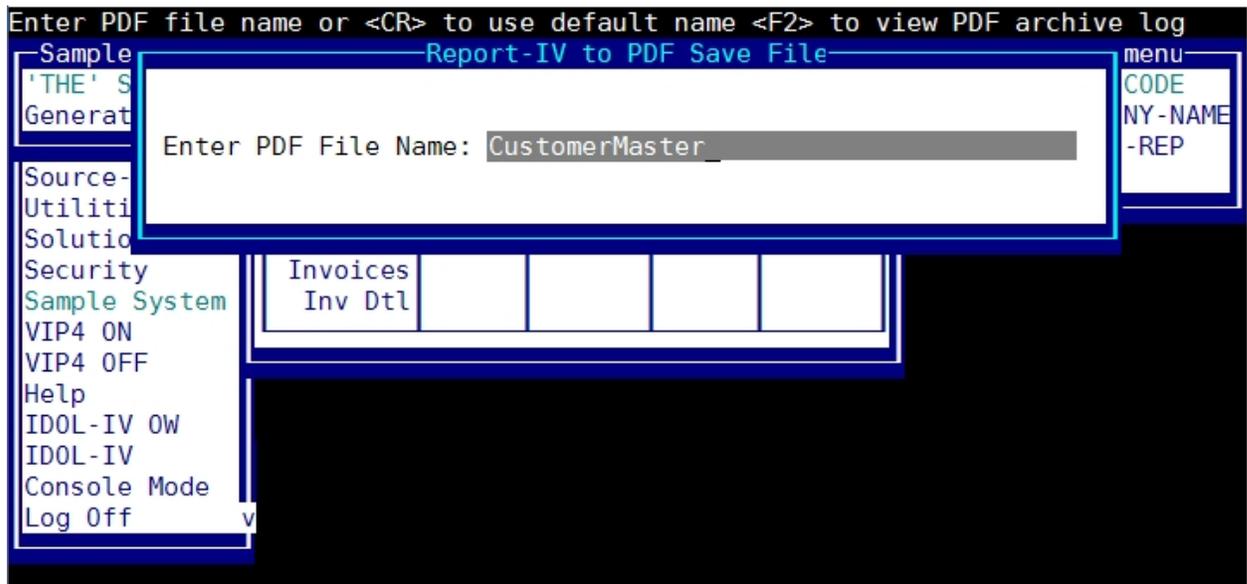
- Defined by global: #OOFPDF1.USR-NAMES-PDF
- Required or optional: optional
- Maximum size: 1 Y/N
- Default value: disabled

REMARKS

The user supplied name will be appended to #OOFPDF1.RPT-PATH.

This prompt is displayed each time a report is converted to .pdf format.

EXAMPLES



Post Save Method Enabled

When enabled, the Post Save Method will be executed. When disabled the Post Save Method is not executed.

- Defined by global: #OOFPDF1.ENABLE-POST-METHOD
- Required or optional: optional
- Maximum size: 1 Y/N
- Default value: disabled

REMARKS

Use the enable or disable setting to avoid having to clear and reset the Post Save Method name.

Post Save Method Name

The name of the Method to be executed after the .pdf file has been saved and before the email and Fax commands are processed.

- Defined by global: #OOFPDF1.POST-SAVE-METHOD
- Required or optional: optional
- Maximum size: 8
- Default value: none

REMARKS

The Post Save Method provides access to the final .pdf file for any additional processing that might be required by the application. For example, the .pdf file can be renamed, moved or opened with the Adobe PDF viewer.

The Post Save Method CALL/ENTER list is MSG\$[ALL].

The .pdf file path and name is supplied in MSG\$[1].

For example: MSG\$[1]="C:\PDFOut\OERCUST-20090710115524499520tsi.pdf" or
MSG\$[1]="usr/PDFOut/OERCUST-20090710115524499520tsi.pdf"

No other arguments are supplied in the array. The Report-IV to PDF run time environment can be accessed by including the global format: FORMAT INCLUDE #OOFPDF1, OPT="NONE".

The method is only called when #OOFPDF1.ENABLE-POST-METHOD = "Y".

EXAMPLES

See the Examples section of this document.

Email Enabled

When enabled the email command will be executed. When disabled the email command will not be executed.

- Defined by global: #OOFPDF1.ENABLE-EMAIL
- Required or optional: optional
- Maximum size: 1 Y/N
- Default value: disabled

REMARKS

Use the enable or disable setting to avoid having to clear and then reset the email command line.

For more information, please see Email Command.

From

Email from address

- Defined by global: #OOFPDF1.EMAIL-FROM
- Required or optional: optional
- Maximum size: 50 bytes
- Default value: none

REMARKS

This is used to populate the from email address when using the email command. For more information, please see Email Command.

Reply To

Email reply to address

- Defined by global: #OOFPDF1.EMAIL-REPLY
- Required or optional: optional
- Maximum size: 50 bytes
- Default value: none

REMARKS

This is used to populate the reply to email address when using the email command. For more information, please see Email Command.

Subject

Email subject

- Defined by global: #OOFPDF1.SUBJECT
- Required or optional: optional
- Maximum size: 80 bytes
- Default value: none

REMARKS

This is used to populate the email subject line when using the email command. For more information, please see Email Command.

Body

Email body

- Defined by global: #OOFPDF1.BODY
- Required or optional: optional
- Maximum size: 255 bytes
- Default value: none

REMARKS

This is used to populate the email body when using the email command. For more information, please see Email Command.

Email Command

Email command line used to send the .pdf file as an email attachment.

- Defined by global: #OOFPDF1.EMAIL_CMD
- Required or optional: optional
- Maximum size: 255 bytes
- Default value: none

REMARKS

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

When Command(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 Command = "METHOD MYEMETH".

The CALL list for the method is MSG\$[ALL]. MSG\$[1] will contain the full .pdf file name including path.

The Method is executed after the .pdf file is created or after the Post Save Method is executed.

No other email command processing will be done.

When Command(1,7)<>"METHOD" it is assumed that what follows is any valid email command line argument.

The email command line argument supports \$variables. Immediately before the command line argument is executed the \$variables are replaced with the current values from the global format #OORPDF1.

The following is an example of an email command line defined in the Settings and Options screen:

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

The following is an example of the same email command line after Report-IV to PDF has replaced the \$variables with their corresponding values from #OOFPDF1:

```
/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
```

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

The default email command is:

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

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

Supported email switches are:

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

Supported email \$variables are:

Variable	Substitution value
\$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

Enable Fax

When enabled the FAX-CMD will be executed. When disabled the FAX-CMD will not be executed.

- Defined by global: #OOFPDF1.ENABLE-FAX
- Required or optional: optional
- Maximum size: 1 Y/N
- Default value: disabled

REMARKS

Use the enable or disable setting to avoid having to clear and then reset the fax command line. For more information, please see Fax Command.

Fax From Name

Fax from address

- Defined by global: #OOFPDF1.FAX-FROMNAME
- Required or optional: optional
- Maximum size: 30 bytes
- Default value: none

REMARKS

This is used to populate the fax from name when using the fax command line. For more information, please see Fax Command.

Fax From Company Name

Fax from company name

- Defined by global: #OOFPDF1.FAX-FROMCOMPANY
- Required or optional: optional
- Maximum size: 30 bytes
- Default value: none

REMARKS

This is used to populate the fax from company name when using the fax command line. For more information, please see Fax Command.

From Fax Number

Fax from number

- Defined by global: #OOFPDF1.FAX-FROMFAXNUMBER
- Required or optional: optional
- Maximum size: 25 bytes
- Default value: none

REMARKS

This is used to populate the fax from number when using the fax command line. For more information, please see Fax Command.

From Voice Number

Fax from voice number

- Defined by global: #OOFPDF1.FAX-FROMVOICENUMBER
- Required or optional: optional
- Maximum size: 25 bytes
- Default value: none

REMARKS

This is used to populate the fax from voice number when using the fax command line. For more information, please see Fax Command.

Fax Subject

Fax subject

- Defined by global: #OOFPDF1.FAX-SUBJECT
- Required or optional: optional
- Maximum size: 25 bytes
- Default value: none

REMARKS

This is used to populate the fax subject when using the fax command line. For more information, please see Fax Command.

Fax Message

Fax message

- Defined by global: #OOFPDF1.FAX-MESSAGE
- Required or optional: optional
- Maximum size: 255 bytes
- Default value: none

REMARKS

This is used to populate the fax message when using the fax command line. For more information, please see Fax Command.

Fax Command

Fax command line used to fax the .pdf file.

- Defined by global: #OOFPDF1.FAX
- Required or optional: optional
- Maximum size: 255 bytes
- Default value: none

REMARKS

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

When Command(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 MYFMETH set Command = "METHOD MYFMETH".

The CALL list for the method is MSG\$[ALL]. MSG\$[1] and will contain the full .pdf file name including path.

The Method is executed after the .pdf file is created, after the Post Save Method is executed, or after the email command is executed.

No other fax command processing will be done.

When Command(1,7)<>"METHOD" it is assumed that what follows is any valid fax command line argument.

The fax command line argument option supports \$variables. Immediately before the command line is executed the \$variables are replaced with the current values from the global format #OOFPDF1.

The following is an example of a fax command line for VSI*FAX defined in the Settings and Options screen:

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

The following is an example of the same fax command line after Report-IV to PDF has replaced the \$variables with their corresponding values from #OOFPDF1:

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

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

Supported fax \$variables are:

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

USING REPORT-IV TO PDF

Runtime Settings and Options

When running in the OPENworkshop environment, #OOFPDF1 is automatically initialized with the values from the Settings and Options screen.

If you are not running in an OPENworkshop environment you will have to call OORPDF02 to initialize #OOFPDF1 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 at any time in your application code by checking #OOFPDF1.INIT-FLAG to determine if #OOFPDF1 has been initialized. After Report-IV to PDF completes the initialization logic, #OOFPDF1.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 other global settings maintained in #OOFPDF1.

#OOFPDF1.SYS-WAIT

The maximum number of seconds to wait for the conversion process before returning an error message.

After the report is passed to the .pdf driver, approximately every second the system will attempt to open the .pdf file. If the file exists it will terminate the wait logic. If it does not exist, it will repeat the wait logic until it has reached SYS-WAIT iterations.

The default value is 1. The default value can be changed by modifying the preset value for #OOFPDF1.SYS-WAIT in Dictionary-IV Maintenance. The wait value can be changed at run time by changing the value for #OOFPDF1.SYS-WAIT. For example:

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE;
#OOFPDF1.SYS-WAIT = 15.0
```

#OOFPDF1.PDF-RPT-NAME

The name of the .pdf file. Before the conversion process has completed, #OOFPDF1.PDF-RPT-NAME will contain the name of the temporary text file with a file extension of .txt1 instead of .pdf.

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
- (32,4) File extension (.pdf).

#OOFPDF1.FAX-TOFAXNUMBER

The fax to phone number.

#OOFPDF1.FAX-TONAME

The fax to name.

#OOFPDF1.FAX-TOCOMPANY

The fax to company name.

#OOFPDF1.EMAIL-ADDR

One or more send email addresses. The format will vary depending upon the email software being used. For example:

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

#OOFPDF1.EMAIL-CC

One or more carbon copy (CC) email addresses.

#OOFPDF1.INIT-FLAG

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.

#OOFPDF1.BACKPG

Contains the background .pdf file name.

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.

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.



(732) 560-1377 FAX: (732) 560-1594

CUSTOMER INVOICE

Customer Code:	100105	Invoice Nbr:	000006
Customer PoNbr:	0000285	Invoice Date:	06/11/07

Order Number:	5600285
Shipped Via:	FedEx

Invoice To: Lumber Inc. Walter Snider Big Horn ND 35231 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, #OOFPDF1.BACKPG-PATH.

#OOFPDF1.LEFT-MARGIN

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

#OOFPDF1.RIGHT-MARGIN

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

#OOFPDF1.LINE-SPACE

The space between lines. This is always in points 1/72 of an inch. The default value is 2.

#OOFPDF1.FONT-SIZE

The font size. The font size is adjusted based on the Report-IV width (#OOFRPRT.RPRT-WIDTH). In order to perform these calculations the only supported font is Courier.

The number of lines per page is adjusted based on the font size.

When the report width is equal to or greater than 132 the report is converted to landscape.

The following chart lists report width and the corresponding font size and lines per page.

#OOFRPRT.RPRT-WIDTH	Font Size (Courier)	Lines per page
1 - 90	10	58
91 - 111	8	70
112 - 131	7	78
132 - 152 (landscape)	8	53
152+ (landscape)	7	58

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 YYYY/MM/DD	PDF Crea HH:MI	Oper SS	Oper 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
OERINVN-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).

Email an archived .pdf file

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

```
Send (Y/N)?
OOVPDF2 > Rpt to PDF saved files <
PDF File Name      Report-IV Description  PDF Create PDF Crea Oper
=====
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
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 email attachment. The current value of #OOPDF1.EMAIL-CMD will be used as the default command line argument. This can be modified before sending the email. The \$variables will automatically be replaced with the appropriate values from #OOPDF1 after a response of **Y** to the Send (Y/N) prompt. For more information see Configure Settings and Options, email 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 email 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

From the **Report-IV to PDF Utilities** menu select the **Rebuild PDF Log** option to recreate the log file based on the contents of the directory containing saved .pdf files (#OOPDF1.RPT-PATH). If .pdf files are deleted or renamed manually at the system level, it may be necessary to rebuild the log file.

Reset Globals

From the **Report-IV to PDF Utilities** menu, select the **Reset Global** option to reset the #OOPDF1 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 #OOPDF1 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 #OOPDF1.INIT-FLAG = "". This will force the #OOPDF1 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 email options. After the report is converted to a .pdf file and saved it will be emailed as an attachment.

MAINLINE

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE" ! Include pdf global
LET PDFGLOBAL$=#OOFPDF1, ! Save settings
#OOFPDF1.ENABLE-EMAIL="Y", ! Enable email option
#OOFPDF1.EMAIL-ADDR="cust@tbred.com", ! Set to address
#OOFPDF1.EMAIL-FROM="tbred@tbred.com", ! Set from address
#OOFPDF1.SUBJECT="Customer Master list",! Set subject line
#OOFPDF1.BODY="see attached pdf", ! Set body text
#OOFPDF1.EMAIL-REPLY="tbred@tbred.com"; ! Set reply to
CONNECT REPORT "OERCUST"; ! Connect to report OERCUST
LET #OOFPDF1=PDFGLOBAL$ ! Restore global clearing email ops
```

TERMINATE

Example 3

The following Post Save Method will rename the default .pdf file then display it using Adobe Reader, the default application for the .pdf file extension. For more information on the 'OB' and 'OE' mnemonics please refer to the TbredComm or the TS Environment for Windows manuals.

PROCEDURE

```
FORMAT INCLUDE #OOFPDF1,OPT="NONE";
OLDPDF$=MSG$[1];
NEWPDF$=#OOFPDF1.RPT-PATH+"\CustomerList.pdf";
CMD$="MOVE "+OLDPDF$+" "+NEWPDF$;
SYSTEM CMD$;
WINDOW CREATE (80,2,1,0);
PRINT 'OB',NEWPDF$,'OE';
WINDOW POP;
GOTO CUEXIT
```

Example 4

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
```

