forms@work User Guide

Infor Distribution A+ Version Number 10.02.01

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forms@work Overview

forms@work uses third party software from Optio Software, Inc. to merge Infor Distribution A+ document data with form layouts, and to prepare documents for printing, or if you are using our Fax and/or Mail Server module, for electronic delivery via fax or e-mail. With forms@work you can:

- eliminate the need for expensive pre-printed forms and custom output programming
- minimize system resources use on your IBM i because all formatting is done external to Distribution A+
- customize your forms to include your company logo and information
- control the printing, faxing, and emailing of each document at the system-level, company-level, or user-level

forms@work can be used to process the following Distribution A+ documents:

- invoices
- acknowledgements
- pick lists
- pack lists
- purchase orders
- Accounts Receivable (AR) statements

> NOTE: forms@work does not process reports or listings.
> forms@work only processes Type 1 (8.5 x 11) forms.

Understanding forms@work Processing

forms@work consists of software on the IBM i which enables the definition of selective processing for output documents, and the Optio third-party software which performs the actual output formatting on a Windows server. Your third-party components include:

- OptioDCS™ and Optio Interface Server *or* Optio e.ComIntegrate, which is used to customize and distribute form data from Distribution A+
- Optio DesignStudio™, which is used to customize your forms

- OptioFAX™ (if you plan to use forms@work to fax documents), which is used to manage faxing. There is a server and client component for OptioFAX

In addition to the Optio software, if you plan to fax documents, and you don't currently have Fax installed, you must install it. If you plan to e-mail documents, and you don't currently have Mail Server installed, you must install it. Refer to the installation requirements in the forms@work Installation Guide for a complete list of the requirements.

Using a remote IP address, each document type is sent from Distribution A+ using an Optio output queue defined for the document type on the IBM i to a virtual printer on the Optio server. Optio monitors the virtual printer queues, reads the print stream, applies the incoming data to pre-defined forms, and then routes it to its final destination. Each Distribution A+ document contains a control string which tells Optio the final destination of the document (fax, print, e-mail, ar any combination of the three delivery methods).

Optio applies the data stream from the IBM i to the appropriate form based on the queue through which it is processed. Keep in mind that Optio parses the data it receives from Distribution A+ and applies its formatting based on position. If you rearrange the fields that are on the form layout templates provided with your installation, the definition of the data is intact. However, if you change the format of the output coming from Distribution A+, you will have to rework the Optio definitions.

The following diagram illustrates the processing flow from the IBM i to the Optio server and to the final output of the document.

forms@work System Processing
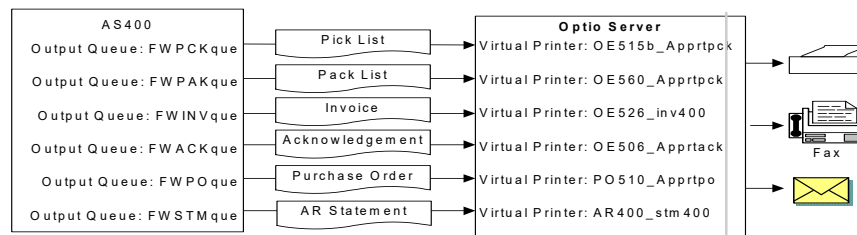
Printing through forms@work

When you chose to print a document from Distribution A+ the system evaluates a number of settings to determine where to print the document. The figure on page 3 illustrates this process.

forms@work Print System Flow
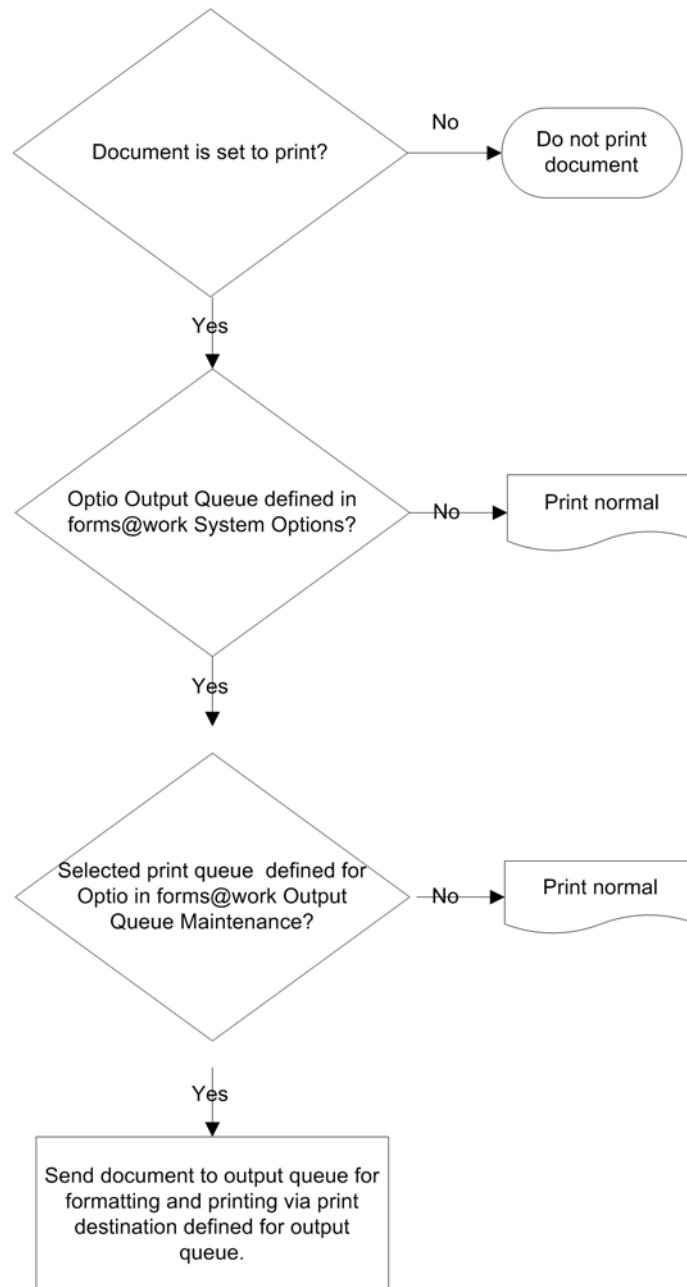
First, the system verifies that the document is set to print for the customer through Customer/Ship-to Master Maintenance (MENU ARFILE - Option 1), the vendor through Vendor Maintenance (MENU POFILE - Option 1), or the warehouse through Warehouse Numbers Maintenance (MENU IAFILE - Option 3).

Then, the system verifies that an Optio output queue has been defined for the document type through forms@work System Options (MENU FWFILE - Option 1). If an output queue is not defined, the document does not print.

If an Optio output queue is defined, the system then checks to verify that the output queue for the document has a physical printer assigned to it in forms@work Output Queue Maintenance (MENU FWFILE - Option 2). If the output queue does not have a printer assigned, the document prints normally to the output queue specified for it. If the selected printer is defined, the document is sent to the Optio server (via the Optio output queue) for formatting and then, the Optio server sends the document to the physical printer associated with the document's output queue.

> NOTE: Because printing AR Statements during month-end processing is a batch job, the user will not be prompted for a print destination. The user's default output queue must be defined as a forms@work output queue through forms@work Output Queue Maintenance (MENU FWFILE - Option 2).

Faxing through forms@work

You must have the Fax module installed and configured to fax documents through forms@work. When a user chooses to fax a document from Distribution A+, the system evaluates a number of settings to determine how to handle the fax. The figure on page 5 illustrates this process.

forms@work Fax System Flow

If the Fax module is installed, first the system verifies that selected document is set to fax for the customer through Customer/Ship to Master Maintenance (MENU ARFILE - Option 1), the vendor through Vendor Maintenance (MENU POFILE - Option 1), or the warehouse through Warehouse Numbers Maintenance (MENU IAFILE - Option 3).

If the document is not set to fax, it is not faxed. If the document is set to fax, the system then checks to see whether the Fax via Optio field is set to Y through CHAPTER 3: *Defining the forms@work Options*. If the document is not set to fax via Optio, it is not faxed. If the document is set to fax via Optio, the system then checks the user options and sends the fax using the user's definition. If no user definitions are provided, the system check the company options and sends the fax using the company's definition. If no company definitions are provided, the fax is sent using the system definitions.

For interactive (not batch) fax jobs, the FAX Cover Sheet Information Screen appears so that the user can verify the document, company, contact, and fax number being used. Refer to the Appendix of the Fax Guide for more information on this screen.

E-mailing through forms@work

You must have the Mail Server module installed and configured to e-mail documents through forms@work. The figure "forms@work E-mail System Flow" on page 1-7 illustrates this process.

forms@work E-mail System Flow
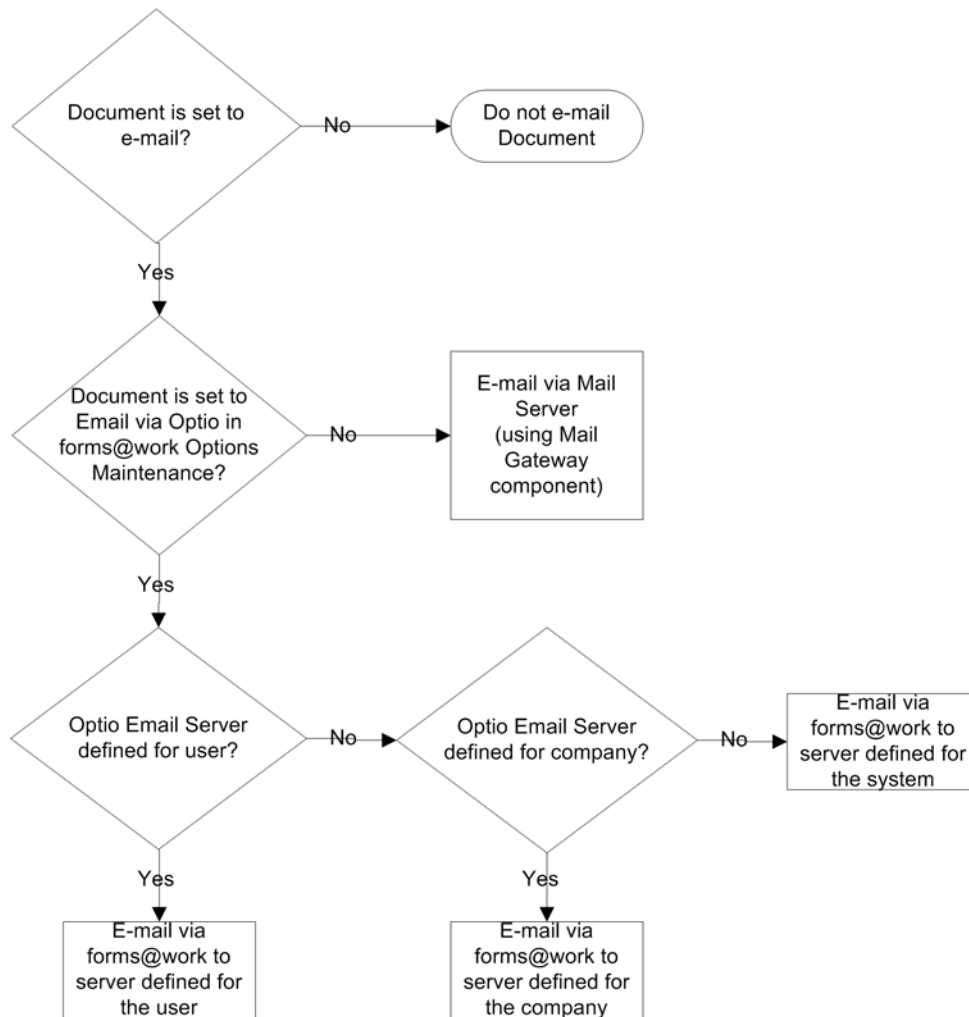
First, the system verifies that the selected document is set to e-mail for the customer through Customer/Ship to Master Maintenance (MENU ARFILE - Option1), the vendor through Vendor Maintenance (MENU POFILE - Option 1), or the warehouse through Warehouse Numbers Maintenance (MENU IAFILE - Option 3). If the document is not set to e-mail, it is not e-mailed. If the document is set to e-mail, the system then checks to see whether the **Email via Optio** field is set to Y through the forms@work Options Maintenance Screen (p. 3-4). If the document is not set to e-mail via Optio, it is e-mailed through the Mail Server module using the Mail Gateway component. E-mailing through the Mail Server module sends just a text version of the e-mail; no Optio formatting is provided. If the document is set to email via Optio, the system then checks the user options and sends the e-mail using the user's definition. If no user definitions are provided, the system check the company options and sends the e-mail using the company's definition. If no company definitions are provided, the e-mail is sent using the system parameters.

Setup and Configuration   2

As the system administrator, your role is to setup and configure Distribution A+ to pass output documents to forms@work. You must define the specific handling for each document that you want handled by forms@work, and you must define the parameters for each handling type (print, fax, and e-mail) that you want to use. For example, if you want your invoices to print, fax, and e-mail through forms@work, you will define system-wide parameters for printing, faxing and e-mailing. If you have a specific user for whom you want to override the system settings, you can override them for that particular user, for a particular document.

Important

You must have completed the installation and setup described in the forms@work Installation Guide before you begin to set up forms@work in Distribution A+.

Using This Guide

The remainder of this document provides specific details about setting up and configuring the forms@work software at your site. The following information is provided:

- CHAPTER 2: *Setup and Configuration* provides a checklist for and information about setting up forms@work to process documents for printing, faxing, or e-mailing.

- CHAPTER 3: *Defining the forms@work Options* describes the forms@work Options Maintenance and Listing options.

- CHAPTER 4: *Defining the forms@work Output Queues* describes the forms@work Output Queues Maintenance and Listing options.

- APPENDIX A: *Troubleshooting forms@work* provides troubleshooting assistance for common forms@work issues.

In addition to this document, information about installing and configuring the software can be found in the forms@work Installation Guide.

Setting up forms@work

This chapter provides a checklist for setting up forms@work. You can use forms@work for forms processing (to format printed versions of your documents), to fax documents, and to e-mail documents. Following the checklist, the setup steps are explained in more detail.

Most of the setup options are available from the forms@work File Maintenance menu (MENU FWFILE), which can be accessed by selecting option 40, File Maintenance Menu from the APLUS Main Menu and then selecting option 18, forms@work, from the File Maintenance Menus.

Checklist for setting up forms@work

Task
☐ Define the Fax system options to use Optio for faxing (Required only if you will be faxing documents using forms@work).
☐ Set up the Mail Server module (Required only if you will be e-mailing documents using forms@work).
☐ Define the forms@work system options for each document that you want processed through forms@work.
☐ Define the forms@work company options for each document that you want processed through forms@work (optional).
☐ Define the forms@work user options for each document that you want processed through forms@work (optional).
☐ Define the warehouse options for faxing pick lists and pack lists (Required only if you will be faxing using forms@work).
☐ Define the forms@work output queues.

1. **Define the Fax system options to use Optio for faxing (Required only if you will be faxing documents using forms@work).**

   To set up Distribution A+ to fax through forms@work, you must set up the Fax module to fax via Optio. The Fax system options are defined through Fax System Options Maintenance on the Fax Main menu (MENU AXMAIN). Refer to the Fax User Guide for a description of this option.

2. **Set up the Mail Server module (Required only if you will be e-mailing documents using forms@work).**

   If you are using forms@work to e-mail documents, you must complete the set up of the Mail Server module to add e-mail addresses for your customer, vendors, warehouses, and users.

   Refer to the setup checklist for the Mail Server module in the Cross Applications User Guide for more information.

3. **Define the forms@work system options for each document that you want processed through forms@work.**

For each document that you want to be processed by Optio for printing, you must specify the Optio output queue through which the document must be processed. Each document will have a unique output queue.

For each document that you want to be faxed, you must indicate that you want it to be faxed and specify the Optio Fax Server through which the document must be processed.

For each document that you want to be e-mailed, you must indicate that you want it to be e-mailed and specify the Optio Email Server through which the document must be processed.

The system options are set up through forms@work Options Maintenance (MENU FWFILE). Refer to CHAPTER 3: *Defining the forms@work Options* for a description of this option.

4. **Define the forms@work company options for each document that you want processed through forms@work (optional).**

If you have multiple companies and you want documents processed for each company processed by Optio, you must specify the Optio output queue through which each document will be processed for each company. Within each company, each document will have a unique output queue. If a company has an output queue defined, when documents associated with that company are printed, that company's definition overrides the output queue defined for the system.

If you have multiple companies and you want documents faxed for each company, you must specify the Optio Fax Server through which each document will be processed for each company. If a company has a server defined, when documents associated with that company are faxed, that company's definition overrides the server defined for the system.

If you have multiple companies and you want documents e-mailed for each company, you must specify the Optio Email Server through which each document will be processed for each company. If a company has a server defined, when documents associated with that company are e-mailed, that company's definition overrides the server defined for the system.

The company definition is set up through forms@work Options Maintenance (MENU FWFILE). Refer to CHAPTER 3: *Defining the forms@work Options* for a description of this option.

5. **Define the forms@work user options for each document that you want processed through forms@work (optional).**

If you want to specify a different Optio output queue for a specific user, you can. If a user has an output queue defined, when that users prints documents, the user's definition overrides the output queue defined for the company and/or system.

If you want to specify a different Optio Fax Server for a specific user, you can. If a user has a server defined, when that users faxes documents, the user's definition overrides the server defined for the company and/or system.

If you want to specify a different Optio Email Server for a specific user, you can. If a user has a server defined, when that users e-mails documents, the user's definition overrides the server defined for the company and/or system.

The user definition is set up through forms@work Options Maintenance (MENU FWFILE). Refer to CHAPTER 3: *Defining the forms@work Options* for a description of this option.

6. **Define the warehouse options for faxing pick lists and pack lists (Required only if you will be faxing documents using forms@work).**

If you are using forms@work to fax and you want to fax pick lists and/or pack lists to your warehouses, you must provide the fax information for the warehouse and indicate which documents you want the warehouse to receive via fax. The Fax warehouse options are defined through Fax System Options Maintenance on the Fax Main menu (MENU AXMAIN). Refer to the Fax User Guide for a description of this option.

7. **Define the forms@work output queues.**

When you print through forms@work, the output data from Distribution A+ is passed to the Optio server where it is merged with the electronic form and is then printed on a shared network printer. You must associate the output queues with the physical printers on your network that are forms@work printer destinations. All printers must be shared system printers, available to both the IBM i and Optio.

Refer to CHAPTER 4: *Defining the forms@work Output Queues* for a description of this option.

Defining the forms@work Options

3

When you define the forms@work options, you are specifying how Distribution A+ will handle the six document types that can processed by forms@work. forms@work options can be defined at three levels: system, company, and user. For each document type that you want to be processed by forms@work, you must define system-level options. Defining company-level and user-level options is optional.

forms@work options for all levels are defined through forms@work Options Maintenance (MENU FWFILE - Option 1). The forms@work File Maintenance menu (MENU FWFILE), which can be accessed by selecting option 40, File Maintenance Menu from the Main Menu and then selecting option 18, forms@work, from the File Maintenance Menus.

forms@work Options Maintenance

This section describes the screens in the forms@work Options Maintenance option.

Title	Purpose
forms@work Options Selection Screen	Use to select the company and form to be defined.
forms@work Options Maintenance Screen	Use to define options for the selected document type at the system, company, or user level.
forms@work Options Listing	Prints forms@work options.

forms@work Options Selection Screen

```
          forms@work OPTIONS SELECTION


       Company?    _.    00 = System Options

       User ID:   ..........

       Document:  ..   1 = Acknowledgement
                       2 = Invoice
                       3 = Pack Slip
                       4 = Pick List
                       5 = A/R Statements
                       6 = Purchase Order











                                          F3=Exit
```

This screen appears after selecting option 1 - forms@work Options Maintenance (MENU FWFILE).

Use this screen to specify whether you are maintaining system, company, or user options and the document type for which you want to maintain settings.

forms@work Options Selection Screen Fields and Function Keys

Field/Function Key	Description
Company	Use this field to indicate whether you want to maintain system or company options.
	If you want to maintain the system options for a document, key 00 or leave this field blank.
	If you want to maintain the company options for a document, key a company number. If you enter a company number, you must leave the **User ID** field blank.
	Valid Values: 00, blank, or a company number defined through Company Name Maintenance (MENU XAFILE - Option 2).
	(N 2,0) Required/Blank
User ID	Use this field to specify the user ID to define document settings for that user. If you enter a user ID in this field, you must leave the **Company** field blank or set to 00.
	Valid Values: a user ID defined through Register A+ User IDs (MENU XACIFG).
	(A 10) Optional

forms@work Options Selection Screen Fields and Function Keys

Field/Function Key	Description
Document	Use this field to select the document type that you want to maintain. (N 1,0) Required
F3=Exit	Press the F3=EXIT function key to exit this option and return to the forms@work File Maintenance menu.
Enter	Press the ENTER key to confirm your entries. The forms@work Options Maintenance screen appears.

forms@work Options Maintenance Screen

```
              forms@work OPTIONS MAINTENANCE


         Company:
         User ID:
         Document:  1   Acknowledgement

         Fax Via Optio:        Y    (Y/N)
         Email Via Optio:      Y    (Y/N)
         Optio Output Queue:   FWACKQUE
         Optio Fax Server:     FWFAXSERVER
         Optio Email Server:   10.11.123.456


                                             F12=Return
```

This screen appears after you press ENTER on the forms@work Options Selection Screen (p. 3-2) screen. Use this screen is used to define options for the selected document type at the system, company, or user level.

forms@work Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Fax Via Optio	This field appears only if you are maintaining the system-level options for the selected document.
	Use this field to indicate whether you want the selected document to be faxed using Optio.
	If you want this document to be faxed using Optio, set this field to Y.
	If you do not want this document to be faxed using Optio, set this field to N.
	Default Value: N
	(A 1) Required

forms@work Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Email Via Optio	This field appears only if you are maintaining the system-level options for the selected document.
	Use this field to indicate whether you want the selected document to be e-mailed using Optio.
	If you want this document to be e-mailed using Optio, set this field to Y.
	If you do not want this document to be e-mailed using Optio, set this field to N.
	Default Value: N
	(A 1) Required
Optio Output Queue	The name of the IBM i output queue that you created to use to send this document type to Optio. Refer to the forms@work Installation Guide if you need more information about creating the Optio output queues.
	NOTE: If you are defining user-level options for the AR Statements, to print AR Statements using Optio during month-end (batch) processing, the user's default queue must be defined as a forms@work output queue through forms@work Output Queue Maintenance (p. 4-1) (MENU FWFILE).
	(A 10) Required
Optio Fax Server	If you are maintaining company-level or user-level options, this field appears only if the **Fax Via Optio** field was set to Y for the selected document at the system-level.
	Use this field to specify the name of the Optio server where the OptioFAX server software is installed. If the name of the Optio server is more than 15 characters long, use the IP address of the Optio server instead.
	For system-level options this field is required only if the **Fax Via Optio** field to set to Y; otherwise, this field must be left blank. For company-level and user-level options, this field is always required.
	(A 15) Required/Blank
Optio Email Server	If you are maintaining company-level or user-level options, this field appears only if the **Email Via Optio** field was set to Y for the selected document at the system-level.
	Use this field to specify the name of the computer on which your e-mail server is installed or the address of your ISP SMTP server. If the name of the ISP SMTP server address is more than 15 characters long, use the IP address of the SMTP server instead.
	For system-level options this field is required only if the **Email Via Optio** field to set to Y; otherwise, this field must be left blank. For company-level and user-level options, this field is always required.
	(A 15) Required/Blank

forms@work Options Maintenance Screen Fields and Function Keys

Field/Function Key	Description
F12=Return	Press the F12=RETURN function key to return to the *f*forms@work Options Selection Screen (p. 3-2) without saving your changes.
F24=Delete	The F24=DELETE function key appears only when you are changing company-level or user-level options.
	Press the F24=DELETE function key to delete the document definitions for the selected company or user.
Enter	Press the ENTER key to confirm your entries. You will be returned to the forms@work Options Selection Screen (p. 3-2).

Defining the System Options

1. Go to the forms@work File menu (MENU FWFILE).
2. Select option 1, forms@work Options Maintenance. The forms@work Options Selection Screen appears.
3. On the forms@work Options Selection Screen, key 00 in the **Company** field to maintain the system-level options and in the **Document** field, key the number that corresponds to the document type that you want to maintain. Press ENTER. The forms@work Options Maintenance Screen appears.
4. On the forms@work Options Maintenance Screen, specify whether the selected document type will be faxed and/or e-mailed using Optio and provide the queue and server information for the document.
5. Press ENTER to save your settings. You are returned to the *f*forms@work Options Selection Screen.
6. Repeat these steps for each document type that you want handled by forms@work.

Defining Company Options

You need to define company options only if you require different handling for documents based on the company for which it will be processed. For example, if you are using multiple companies in Distribution A+, you may have different formats for your forms based on the company and, therefore, different Optio output queues to handle the format differences.

You must have defined the system-level settings for a document before you can define the company-level settings.

1. Go to the forms@work File menu (MENU FWFILE).
2. Select option 1, forms@work Options Maintenance. The forms@work Options Selection Screen appears.
3. On the forms@work Options Selection Screen, key the company number in the **Company** field to maintain the company-level options for that company and in the **Document** field, key the number that corresponds to the document type that you want to maintain. Press ENTER. The forms@work Options Maintenance Screen appears.

4. On the forms@work Options Maintenance Screen, specify provide the queue and server information for the document.

5. Press ENTER to save your settings. You are returned to the forms@work Options Selection Screen.

6. Repeat these steps for each document type that you want to use company-level options when it is handled by forms@work.

Defining User Options

You need to define user options only if you require different handling for documents based on the user who initiates the document's processing. You must have defined the system-level settings for a document before you can define the user-level settings.

1. Go to the forms@work File menu (MENU FWFILE).

2. Select option 1, forms@work Options Maintenance. The forms@work Options Selection Screen appears.

3. On the forms@work Options Selection Screen, key the ID of the user in the **User ID** field to maintain the user-level options for that user and in the **Document** field, key the number that corresponds to the document type that you want to maintain. Press ENTER. The forms@work Options Maintenance Screen appears.

4. On the forms@work Options Maintenance Screen, specify provide the queue and server information for the document.

5. Press ENTER to save your settings. You are returned to the forms@work Options Selection Screen.

6. Repeat these steps for each document type that you want to use user-level options when it is handled by forms@work.

forms@work Options Listing

Once you have defined the system-level, company-level, and user-level options for all of the document types that you want to be processed by forms@work, you can print a listing of the settings that you have defined.

This section describes the forms@work Options Listing option. This option does not have any screens. When you select option 11 - forms@work Options Listing, the Report Options screen appears. For a description of the Report Options screen, refer to the Cross Applications User Guide.

Procedure 3-1. **Printing the forms@work Options List**

1. Go to the forms@work File Maintenance menu (MENU FWFILE).

2. Select option 11 - forms@work Options Listing. The Report Options Screen appears. Make your selections on that screen and press ENTER to print the listing.

forms@work Options Listing

```
FW810       20/10/11    9:17:28              forms@work OPTIONS LISTING                         J2/APDEMO                     PAGE:   1
Co   User ID       Document   Document Description   Fax Via   Email Via   Optio Output   Optio Fax Server   Optio Email Server
                                                     Optio     Optio       Queue
-------------------------------------------------------------------------------------------------------------------------------
     INSALES       1          Acknowledgement        N                     PRT04                             10.10.10.10
                   1          Acknowledgement        Y         Y           FWACKQUE       USOPTIO3           10.11.12.13
                   2          Invoice                Y         Y           FW8INVQUE      USOPTIO3           10.12.13.14
                   3          Pack Slip              N         N           OPTPACQUE
                   4          Pick List              N         N           OPTPCKQUE
                   6          Purchase Order         N         Y           OPTPOQUE                          10.13.14.15
                   5          A/R Statements         N         Y           OPTSTMTQUE                        10.14.15.16
```

This listing prints after completing selections on the Report Options Screen.

Refer to the forms@work Options Maintenance Screen (p. 3-4) for information on the data displayed on this listing.

CHAPTER 4 **Defining the forms@work Output Queues** 4

When you define the forms@work output queues, you are specifying the final printer destinations for the printer output queues that you have defined on the IBM i. This option creates the relationship between the output queues and the physical printers defined on your network.

You can define several printers on your network as forms@work printer destinations, however, keep in mind that all printers must be shared system printers, available to both the IBM i and the Optio server. When forms are printed using forms@work, Distribution A+ passes output data to the Optio server via the Optio output queue defined for the document. The Optio software then merges this output data with the electronic forms and prints the document on a shared network printer. Optio selects the printer based on the output queue that was specified for the document (although the document is never actually processed through that output queue). If you direct your print output to a queue that does not have a physical printer associated with it, the document will not print through Optio, but will print instead to the output queue specified for the document.

forms@work output queues are defined through forms@work Output Queue Maintenance (MENU FWFILE - Option 2).

forms@work Output Queue Maintenance

This section describes the screens in the forms@work Output Queue Maintenance option.

Title	Purpose
forms@work Output Queue Selection Screen	Use to define the URL path for the output queues to be used by forms@work.
forms@work Output Queue Maintenance Screen	Use to define the specific URL path for the selected output queues following the sample.
forms@work Output Queue Listing	Prints the output queue and printer destination.

forms@work Output Queue Selection Screen

```
                    forms@work OUTPUT QUEUE SELECTION



             Output Queue:   _ . . . . . . . . .













                                                        F3=Exit
```
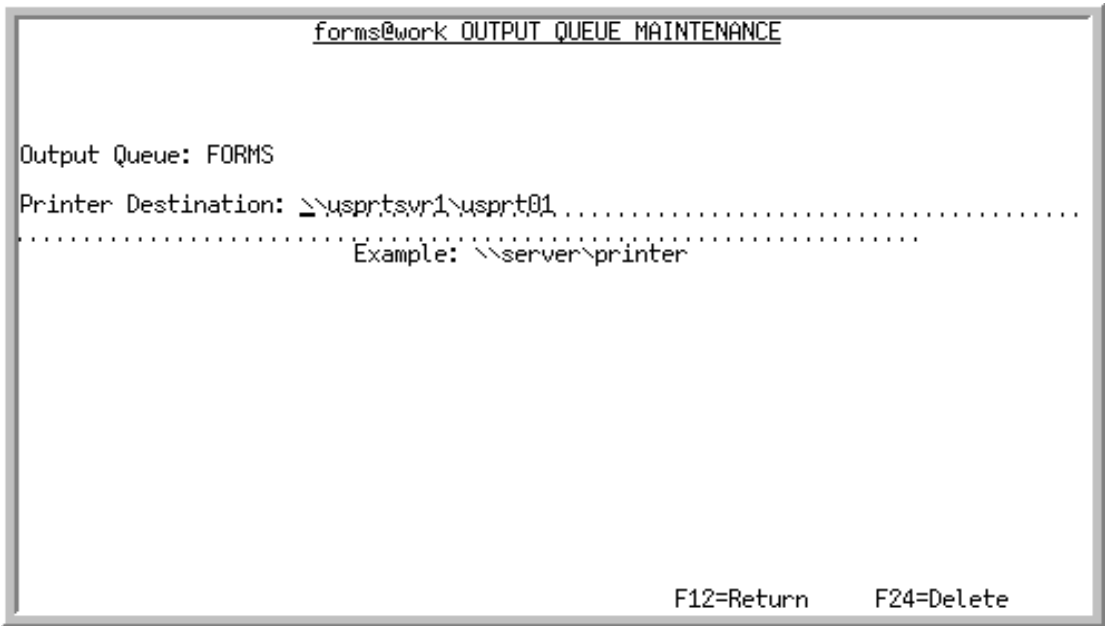
This screen displays after selecting option 2 - forms@work Output Queue Maintenance (MENU FWFILE). Use this option to define the URL path for the output queues to be used by forms@work.

forms@work Output Queue Selection Screen Fields and Function Keys

Field/Function Key	Description
Output Queue	Use this field to specify the output queue to which you want to assign a network printer.
	Valid Values: Any IBM i output queue that is not an Optio output queue.
	(A10, Required)
F3=Exit	Press the F3=EXIT function key to exit this option and return to the forms@work File Maintenance menu.
Enter	Press the ENTER key to confirm your entries. The forms@work Output Queue Maintenance Screen (p. 4-3) appears.

forms@work Output Queue Maintenance Screen

```
                    forms@work OUTPUT QUEUE MAINTENANCE


Output Queue: FORMS

Printer Destination: \\usprtsvr1\usprt01...............................
...............................................................
                        Example: \\server\printer







                                      F12=Return      F24=Delete
```

This screen displays after keying the name of a valid output queue and pressing ENTER on the forms@work Output Queue Selection Screen (p. 4-2). Use this screen to define the specific URL path for the selected output queues following the sample.

forms@work Output Queue Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Printer Destination	Use this field to specify the network path to the physical printer that you want documents directed to the selected output queue to use. The printer whose path you indicate must be a shared network printer. You must key the path exactly as it appears on your network as this field is case sensitive.
	(A, 126) Required
F12=Return	Press the F12=RETURN function key to return to the *forms@work Output Queue Selection* screen without saving your changes.
F24=Delete	The F24=DELETE function key appears only when are maintaining a queue that has already been defined as a forms@work output queue.
	Press the F24=DELETE function key to delete the forms@work output queue. You must press the F24=DELETE function key a second time to confirm the deletion.
Enter	Press the ENTER key to confirm your entries. You are returned to the forms@work Output Queue Selection Screen (p. 4-2).

Procedure 4-1. **Defining Print Queues for Network Printers**

1. Go to the *forms@work File Maintenance* menu (MENU FWFILE).

2. Select option 2 - forms@work Output Queue Maintenance. The forms@work Output Queue Selection Screen appears.

3. Key the name of the output queue associated with the printer that you want to use to print output from Optio and press ENTER.

   This can be any valid output queue on the IBM i except for the output queue that is used to send documents to Optio for formatting. The forms@work Output Queue Maintenance Screen displays.

4. Key the actual network name of the printer to which you want the output directed and press ENTER. Remember that this field is case sensitive, and must be entered in the format \\Server\printer.

forms@work Output Queue Listing

Once you have defined the printer destinations for the output queues, you can print a listing of the settings that you have defined.

This section describes the forms@work Output Queue Listing option. This option does not have any screens. When you select option 12 - forms@work Output Queue Listing, the Report Options screen appears. For a description of the Report Options screen, refer to the Cross Applications User Guide.

Procedure 4-2. **Printing the forms@work Output Queue Listing**

1. Go to the forms@work File Maintenance menu (MENU FWFILE).

2. Select option 12 - forms@work Output Queue Listing. The Report Options screen appears. Make your selections on that screen and press ENTER to print the listing.

forms@work Output Queue Listing

```
FW830        20/10/11     9:07:41            forms@work OUTPUT QUEUE LISTING          J2/APDEMO            PAGE:   1
------------------------------------------------------------------------------------------------------------------
Output Queue: FORMS        Printer Destination: \\eg\Laser5NDev
Output Queue: INVOICE      Printer Destination: \\eg\lj4000ps
Output Queue: STMNT        Printer Destination: \\war_shared\lj4000
Output Queue: PACKLST      Printer Destination: \\war_shared\Laser5NDev
```

This listing prints after completing selections on the Report Options Screen.

Refer to the forms@work Output Queue Maintenance Screen (p. 4-3) for information on the data displayed on this listing.

Troubleshooting forms@work

<div style="text-align:right; color:red; font-size:3em; font-weight:bold;">A</div>

This appendix contains answers to common forms@work situations.

- If your documents are printing to a regular printer instead of printing via forms@work, go to page 1.

- If forms@work jobs in the Optio output queue are stuck in send status, go to page 2.

- If a user is unable to sign on to the OptioFAX client, go to page 3.

- If your documents are not faxing and the OptioFAX server name is more than 14 characters, go to page 3.

My Document Prints to a Regular Printer

If your document is not printing via forms@work, but is printing to a regular print queue, use this section as a guide to correct the printing.

1. **What output queue was selected to print the document?**

   Determine the name of the output queue to which the document was sent when it was printed.

2. **Is the selected output queue defined as a forms@work output queue?**

   Check"forms@work Output Queue Maintenance" on page 4-1 (MENU FWFILE - Option 2) to determine if the output queue to which the document was directed to print is defined in that option as a forms@work output queue.

   If the output queue is not defined as a forms@work output queue, define it as one and test print your document again. Refer to "forms@work Output Queue Maintenance" on page 4-1 for information about defining the output queue.

   If the output queue is defined as a forms@work output queue, continue to question 3.

3. **Have the forms@work system options been defined for the document?**

   Check forms@work Options Maintenance (MENU FWFILE - Option 1) to determine that system-level options have been set up for the type of document that you are trying to print.

   If the forms@work system-level options have not been defined for the document, you must define them and test print your document again. Refer to "forms@work Options Maintenance" on page 3-1 for information about setting up the system-level options.

   If the forms@work system-level options are defined, continue to question 4.

4. **Is the Optio output queue defined for the document type running?**

To check the status of the Optio output queue, on the IBM i command line key wrkoutq queuename and press ENTER. The forms@work Output Queue Maintenance Screen (p. 4-3) appears.

If RLS displays in the **Status** field, the output queue is not running. Restart the queue and then test print your document again. To restart the queue, on the command line, key **STRRMTWTR queuename** and press ENTER. Press F5=REFRESH to refresh IBM's Work With Output Queue Screen. RLS/WTR should display in the **Status** field.

If RLS/WTR displays in the **Status** field, the queue is running.

A Job in my Optio Output Queue is Stuck in Send Status

If a job appears to be stuck in send status in your Optio output queue and the status never changes, use this section as a guide to correct the problem.

When your output queue appears stuck, it indicates that although it is attempting to send the current job to the Optio server using the IP address assigned to the queue when it was created and it cannot send the document.

1. **Compare the Internet address defined for the output queue with the IP address of the Optio server.**

   To view the IP address for the Optio output queue, on the IBM i:

   a. On the command line, key **chgoutq queuename**, where queuename is the name of the Optio output queue and press F4=PROMPT. IBM's Change Output Queue Screen appears.

   b. Press F10=ADDITIONAL PARAMETERS to display additional fields. More lines will appear.

   c. Press PAGE DOWN to display the rest of the fields, then press ENTER twice to display the Internet address defined for the queue. Record the address here: _____

   d. Press F12=CANCEL to cancel.

   To view the IP address of the Optio server, on the Optio server:

   a. Click START -> RUN and then key **CMD** and press ENTER to open the DOS prompt.

   b. In the DOS prompt command, key **ping servername** and press ENTER The IP address will be shown. Record the address here: _____. Close the Window.

   If the IP address assigned to the Optio output queue matches the IP address of the Optio server, please call the Response Line for assistance.

   If the IP address assigned to the Optio output queue does not match the IP address of the Optio server, continue with step 2.

2. **Correct the queue configuration on the IBM i.**

   Follow these steps to correct the queue configuration on the IBM i:

   a. On the command line, key **endwtr queuename**, where queuename is the name of the Optio output queue and press ENTER to stop the queue.

   b. On the command line, key chgoutq queuename, where queuename is the name of the Optio output queue and press ENTER. IBM's Change Output Queue Screen appears.

   c. Press ENTER and then press F10 to display additional parameters. Additional fields appear.

   d. Press PAGE DOWN to display the rest of the fields, then press ENTER twice to display the Internet address defined for the queue. Change the Internet address to match the address that you recorded for the Optio server. To save your changes, press ENTER until you are returned to the command line.

   e. On the command line key, **strrmtwtr queuename**, where queuename is the name of the Optio output queue and press ENTER to start the queue.

   f. To monitor the queue and check the job status, on the command line key **wrkoutq queuename**, where queuename is the name of the Optio output queue and press ENTER.

   g. If the job continues to remain stuck in send status, please contact the Response Line.

I Am Unable to Sign On to the OptioFAX Client

If you are unable to sign on to the OptioFAX client, verify that the administrator sign on that you are using as been added to one of the OptioFAX Admin groups. To do this, one the OptioFAX server machine:

1. Go to START->SETTINGS->CONTROL PANEL. The Windows Control Panel appears.
2. Double-click ADMINISTRATOR TOOLS. The Administrator Tools window appears.
3. Double-click COMPUTER MANAGEMENT. The Computer Management window appear.
4. In the **Trees** tab, expand **Local User** and **Groups** and then double-click the GROUPS folder.
5. From the list of groups that display, double-click the OPTIOFAX ADMIN 1 or OPTIOFAX ADMIN 2 group. The OPTIOFAX ADMIN 1 group has more access than the OPTIOFAX ADMIN 2 group has less access. Refer to your Optio documentation for more information about the admin groups. The OptioFAX Admin Properties window appears.
6. In the **Member**s list box, make sure that the user who is unable to access the OptioFAX client is listed. If the user is not listed, add the user by clicking the ADD button. The Select Users or Groups window will appear.
7. Browse to and select the user and then click OK. You are returned to the OptioFAX Admin Properties window.
8. Click OK and close the Computer Management, Administrative Tools, and Control Panel windows.

My Documents Are Not Faxing

If your documents are not being faxed, the computer name of your OptioFAX server machine is more than 14 characters, and OptioFAX client is installed on the OptioFAX server machine, your machine name may have been truncated during the installation of OptioFAX client. To correct this issue, you must

1. Uninstall OptioFAX Client.
2. Uninstall OptioFAX Server.

3. Reinstall OptioFAX Server.

4. Reinstall Optio FAX Client, making sure to enter the server name in the **Server** field (rather than browsing to and selecting it). Before clicking OK, verify that the **ENTIRE** computer name is shown in the **Server** field.

My Document Is Being Sent to the Printer, But Is Not Printing

If your documents are being sent to a network printer, but are not being printed by the network printer, check the user authority for the printer on the network. Because of the user authority settings on some networks, when a user tries to print any Optio document to a network printer, he/she may need to have specific authority to that printer on the network. Without proper authority, a user will be able to send the Optio documents to the printer, but may not be able to print the documents to the network printer.

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