



Infor Distribution A+ forms@work Overview

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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 Infor Distribution A+ Fax and/or Mail Server User Guide, 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 Infor 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 Infor 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 Infor 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

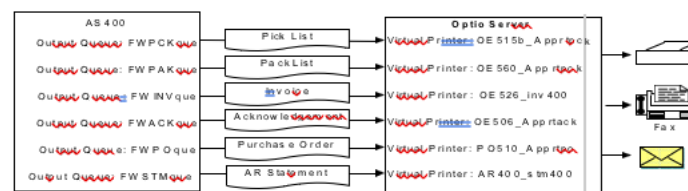
In addition to the Optio software, if you plan to fax documents, and you don't currently have Fax installed, you must install it. If you plan to e-mail documents, and you don't currently have Mail Server installed, you must install it. Refer to the installation requirements in the forms@work Installation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

Using a remote IP address, each document type is sent from Infor 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 Infor Distribution A+ document contains a control string which tells Optio the final destination of the document (fax, print, e-mail, or 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 Infor 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 Infor 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.

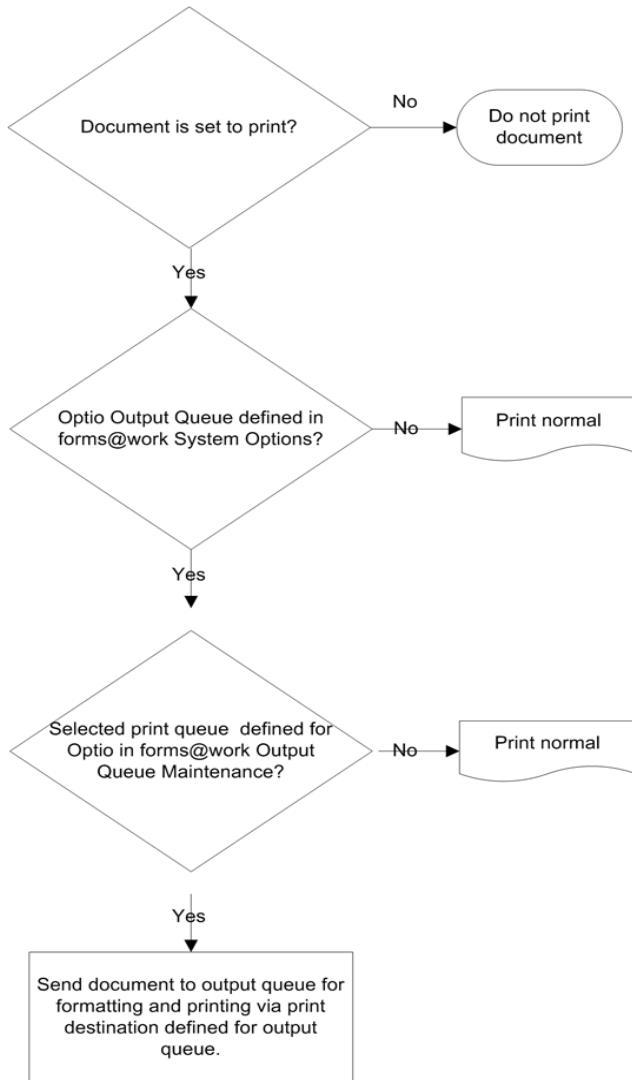
forms@work System Processing



Printing through forms@work

When you chose to print a document from Infor Distribution A+ the system evaluates a number of settings to determine where to print the document. The figure on page 6 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

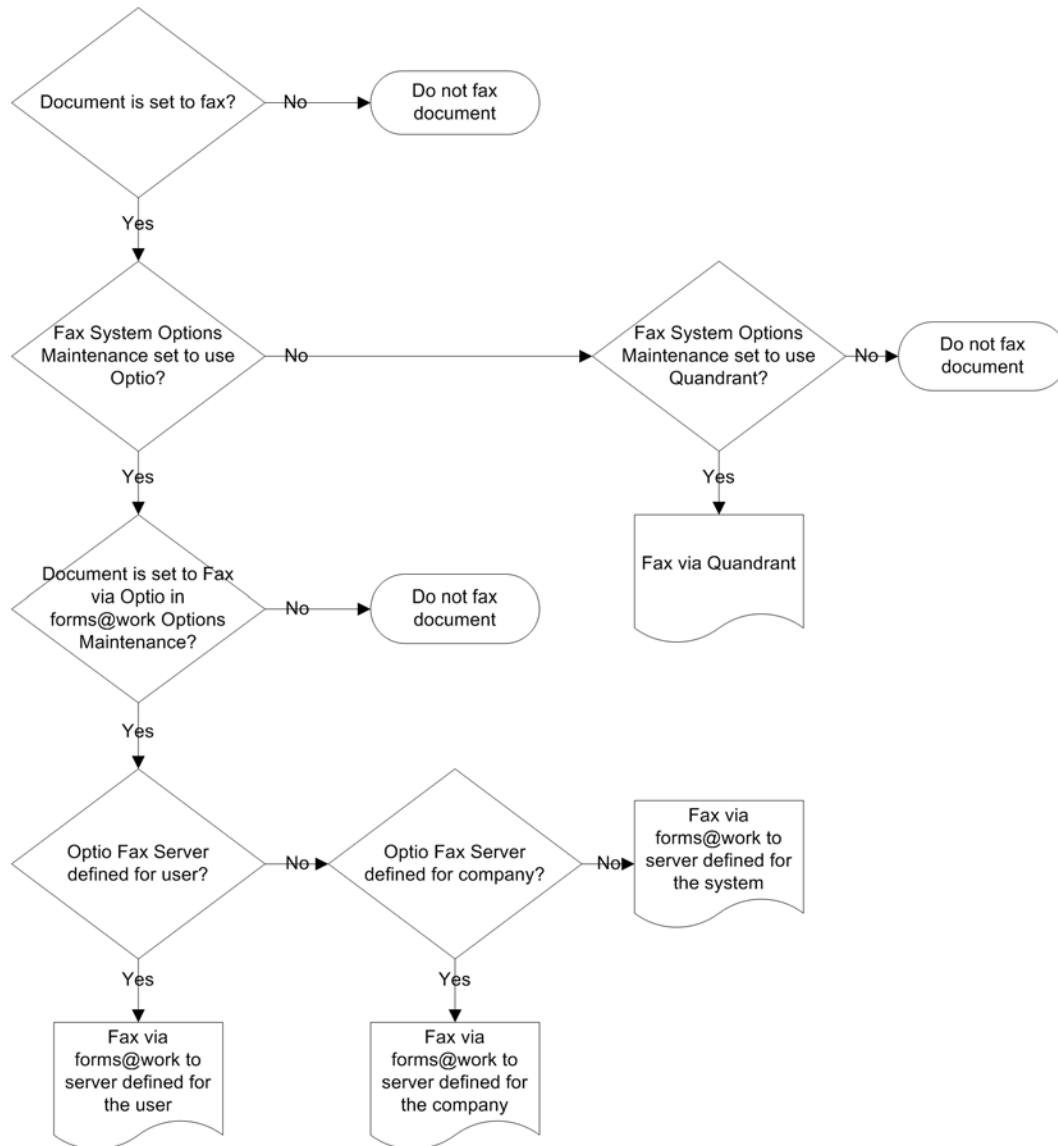
the Optio server (via the Optio output queue) for formatting and then, the Optio server sends the document to the physical printer associated with the document's output queue.

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 Infor Distribution A+, the system evaluates a number of settings to determine how to handle the fax. The figure on page 8 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

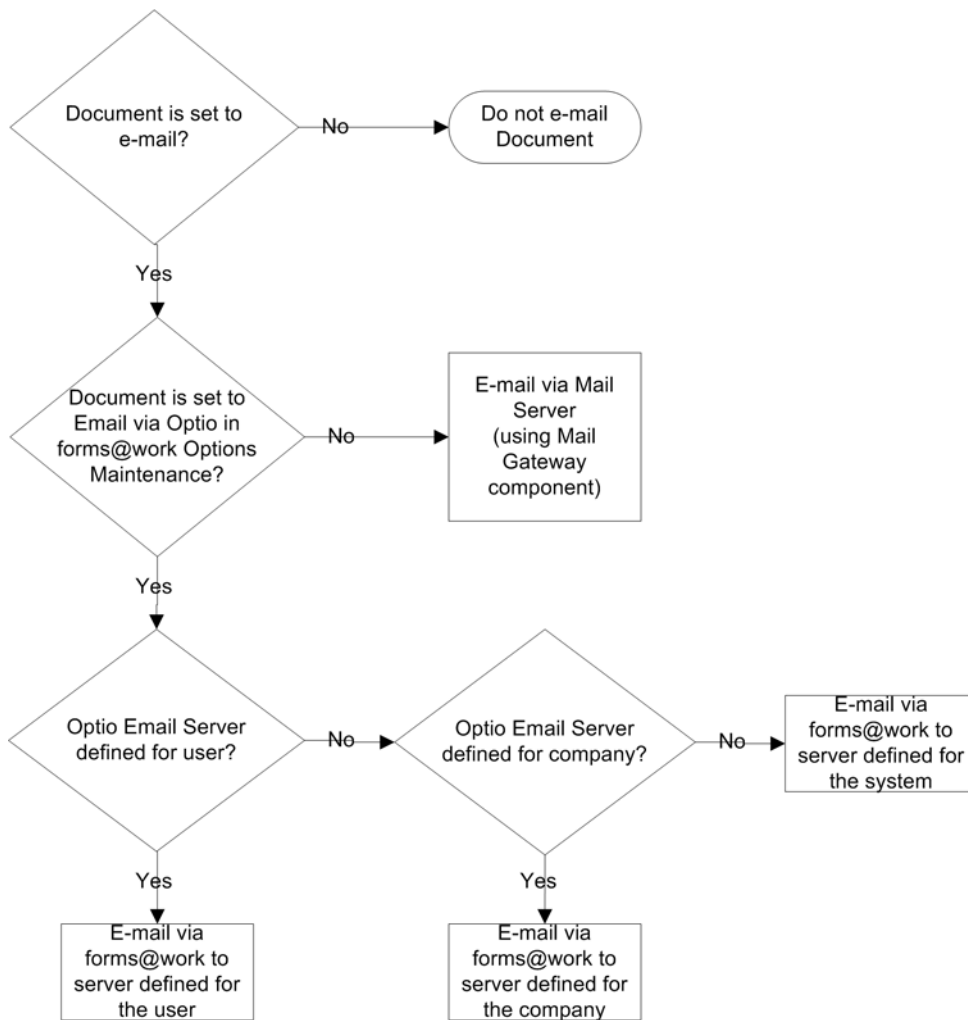
company's definition. If no company definitions are provided, the fax is sent using the system definitions.

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](#)" 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 . 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.