

Oracle® Documaker Desktop

Installing the PDF Print Driver for use with PPS

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Chapter 1

Installing the PDF Print Driver for PPS

With the Oracle Insurance's PDF Print Driver you can print policies or transactions to PDF files.

You currently have the ability to use the system to send a policy in RTF format via email to a recipient. With the PDF Print Driver, you can now also send a policy to a recipient in PDF format via email.

Additionally, you can also now concurrently print one policy for many recipients in a variety of formats, including PDF.

This document will tell you how to install the PDF Print Driver and configure your INI files to handle these options.

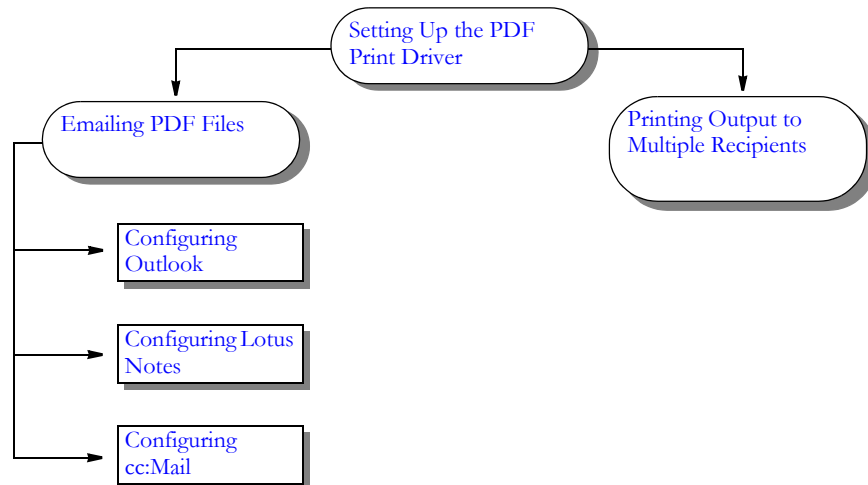
First, you will find a step by step Implementation Checklist to help you get started. Later, you will find more detailed reference material to explain the options.

This chapter includes these topics:

- [Implementing the PDF Print Driver on page 2](#)
- [Setting Up the PDF Print Driver on page 3](#)
- [Emailing PDF Files on page 4](#)
- [Printing Output to Multiple Recipients on page 6](#)

IMPLEMENTING THE PDF PRINT DRIVER

This illustration shows the various steps involved in setting up the PDF Print Driver, setting up your system to email PDF files, and configuring various email systems. It also shows how to set up the PDF Print Driver and then configure your system to send recipient output to multiple printers.



This table shows your options:

For information on	See	You must perform this task
Installing and configuring the PDF Print Driver	Setting Up the PDF Print Driver on page 3	Before you can email PDF files or print recipient output to multiple devices
Emailing PDF files	Emailing PDF Files on page 4	After setting up the PDF Print Driver
Configuring Microsoft Outlook	Configuring Outlook on page 5	After setting up the PDF Print Driver and setting up your system to email PDF files
Configuring Lotus Notes	Configuring Lotus Notes on page 5	After setting up the PDF Print Driver and setting up your system to email PDF files.
Configuring cc:Mail	Configuring cc:Mail on page 5	After setting up the PDF Print Driver and setting up your system to email PDF files
Printing recipient output to multiple devices	Printing Output to Multiple Recipients on page 6	After setting up the PDF Print Driver

In addition, you can find examples of a sample DAL script on [page 8](#).

NOTE: See [Using the PDF Print Driver](#) for additional information on the PDF Print Driver. This book includes additional setup information and information on customizing PDF output, adding security, and working with fonts.

SETTING UP THE PDF PRINT DRIVER

To install the PDF Print Driver, insert the PDF for PPS CD into your CD-ROM drive and run the SETUPEX.EXE program to add the PDFW32.DLL file to your installed system, which would typically be located in the \ppswin\dll directory.

To use the PDF Print Driver, you have to install the software and make changes to the FSIUSER.INI and FSISYS.INI files located in each company's library. You will typically find these INI files in the \ppswin\mstrres\company\ directory.

NOTE: *Before* making any changes to these files, back up your INI files.

- 1 Open the FSISYS.INI file with a text editor and add these options:

```
< Printers >
  PrtType          = PDF
< Control >
  LoadPrintOnly   = Yes
```

- 2 Open the FSIUSER.INI file with a text editor and add these options:

```
< PrtType:PDF >
  Device           = F:\PDF\~KEYID ~DATE ; [%I-%M %p];.PDF
  Module           = PDFW32
  PrintFunc        = PDFPrint
  OutputFunc       = PRTStdOutputFunc
  OutputMod        = PRTW32
< PrtType:PCL >
  SuppressDlg      = Yes
```

The device option is where you specify the path and file name for the PDF file. Be sure to include the spaces and characters as noted. In this example, the system will write a file to the \PDF directory on the F: drive. The file name will include the policy number (KeyID), the time the file was created, and it will have an extension of *PDF*. For example, the file written to disk would have a name similar to:

```
F:\PDF\A100[3-47PM].PDF
```

Your system can now use the PDF Print Driver to print a policy or transaction to disk as a PDF file.

EMAILING PDF FILES

Once you set up the PDF Print Driver, make the following changes in your INI files to set up your system to email files.

NOTE: You can find additional information on email support in the [Documaker Workstation Supervisor Guide](#).

Your INI files should have these settings:

```
< Printers >
  PrtType      = EPT
< PrtType:EPT >
  FileName     = F:\PDF\~KEYID ~DATE ; [%I-%M %p];.PDF
  InitFunc    = EPTInit
  KeepFile    = Yes
  Message     = PDF File attached...
  Message that will appear in the body of the email with the attached
  pdf.  You can customize this message)
  Module      = EPTW32
  PrintFunc   = EPTPrint
  PrtType     = PDF
  RecipFunc   = CSTSetMailRecip
  RecipMod    = CSTW32
  Subject     = PDF File from PPS
  Subject of the email you are sending.  You can customize this message
  TermFunc    = EPTTerm
```

The FileName option is where you specify the path and file name for the PDF file. Be sure to include the spaces and characters as noted.

In this example, the system writes a file to the \PDF directory on the F: drive. The file name includes the policy number (KeyID), the time the file was created, and an extension of *PDF*.

For example, the file written to disk might look like the one shown here:

```
F:\PDF\A100[3-47PM].PDF
```

When you finish with these changes, you can then perform one of the following tasks to configure your email system.

- [Configuring Outlook on page 5](#)
- [Configuring Lotus Notes on page 5](#)
- [Configuring cc:Mail on page 5](#)

CONFIGURING OUTLOOK

Once you set up the PDF Print Driver, configure your system to email PDF files, and follow the steps below, you can use the system to create a PDF file of a form set and then email that file via Outlook to a recipient.

Add these settings to your FSIUSER.INI file using a text editor:

```
<[ Mail >
  MailType    = MSM
< MailType:MSM >
  MailFunc    = MSMMail
  Module      = MSMW32
  Name        = MSMail
  Password    = (Intentionally left blank)
  UserID      = (User ID to access Mail, check your control panel
                for mail setting or with your Administrator for this setting)
```

CONFIGURING LOTUS NOTES

Once you set up the PDF Print Driver, configure your system to email PDF files, and follow the steps below, you can use the system to create a PDF file of a form set and then email that file via Lotus Notes to a recipient.

Add these settings to your FSIUSER.INI file using a text editor:

```
< Mail >
  MailType    = VIM
< MailType:VIM >
  MailFunc    = VMMail
  Module      = VIMW32
  Name        = Notes (Name of the Notes Server)
  Password    =
  UserID      =
```

CONFIGURING CC:MAIL

Once you set up the PDF Print Driver, configure your system to email PDF files, and follow the steps below, you can use the system to create a PDF file of a form set and then email that file via cc:Mail to a recipient.

Add these settings to your FSIUSER.INI file using a text editor:

```
< Mail >
  MailType    = CCM
< MailType:CCM >
  MailFunc    = VMMail
  Module      = VIMW32
  Name        = CCMail (Name of the mail server)
  Password    =
  UserID      =
  DataPath    = V:\ccdata (Default path for the email system)
```

PRINTING OUTPUT TO MULTIPLE RECIPIENTS

Once you set up the PDF Print Driver and follow the steps below, you can have the system create recipient output for multiple print devices by using the Multiple Driver Router (MDR) feature.

NOTE: This feature does not currently work with the email feature (EPTLIB).

For instance, the MDR feature lets you print one recipient's output to one device and other recipient output to other devices. Here is an example:

This recipient	Gets a copy of the form set in this format:
Home Office	PDF
Insured	PCL
Agent	PCL

Add this option to your FSISYS.INI file using a text editor:

```
< Printers >
  PrtType      = MDR
```

Add these settings to your FSIUSER.INI file using a text editor:

```
< PrtType:MDR >
  Default      = PCL
  Device       = lpt1
  Module       = MDRW32
  PageNumbers= No
  PrintFunc    = MDRPrint
  Recip:Home Office= PDF
```

Option	Description
Device	You must specify a default print device, such as a network printer, to use when not otherwise specified by another driver.
PageNumbers	Required if you want page numbering on or off. You may already specify this on the other printer drivers, but it will be necessary to specify it here so that it can carry through to the other drivers during printing.
Default	Use to specify the normal print driver if one is not declared for a given recipient, typically PCL (standard print output to your printer).
Recip:Home Office	The recipient defined on the Forms Selection window (or FORM.DAT) Must match the exact name of the recipient.

In this example, Insured and Agent receive the standard PCL output (sent to a PCL printer). Home Office receives a PDF file. The name of the PDF file is defined in the PrtType:PDF control group.

Keep in mind:

- *Recip:Home Office=PDF* is just an example of how to specify a driver for a recipient. You can have as many such options as you need. You only need to specify the recipients you want sent to a driver other than the default driver.
- You specify *Recip:* and the standard name of the recipient, such as *Insured* or *Home Office*. This name must match the name in your master resource library (MRL). The other side of the equal sign is the name of the printer driver to route to, same as the group specified in your INI file. For this example above, the assumption is that there is a *PrtType:PDF* control group in the INI file.

Selecting PDF for multiple recipients

To specify PDF as the format for more than one recipient you have to change this entry:

```
< PrtType:PDF >
    Device = F:\PDF\~KEYID ~DATE ; [%I-%M %p];.PDF
```

There are several ways to do this:

- Set up an INI control group to handle PDF print settings for each recipient. You can leave the above INI file setting alone and simply add these INI settings:

```
< Printer >
    PrtType    = PDF1
    PrtType    = PDF2
< Printers >
    PrtType    = PDF1
    PrtType    = PDF2
< PrtType:MDR >
    Recip:Agent= PDF1
    Recip:Insured= PDF2
< PrtType:PDF1 >
    Device     = c:\pdf\agent~KEYID ~DATE ; [%I-%M %p];.PDF
    Module     = PDFW32
    PrintFunc  = PDFPrint
    PrintType  = PDF
< PrtType:PDF2 >
    Device     = c:\pdf\insured~KEYID ~DATE ; [%I-%M %p];.PDF
    Module     = PDFW32
    PrintFunc  = PDFPrint
    PrintType  = PDF
```

In this example, when you print using the MDR feature, you receive two PDF files in the c:\pdf directory, one for the agent and one for the insured. The files may look like:

```
c:\pdf\agentA100[3-47PM].PDF
c:\pdf\insuredA100[3-47PM].PDF
```

- Another way is to replace the right side of the equation with the name of a DAL script. The DAL script lets you specify unique names for each recipient. Here is an example:

```
< PrtType:PDF >
    Device = ~DALRUN MDR.DAL
```

Example DAL script

Here is an illustration of the MDR.DAL script:

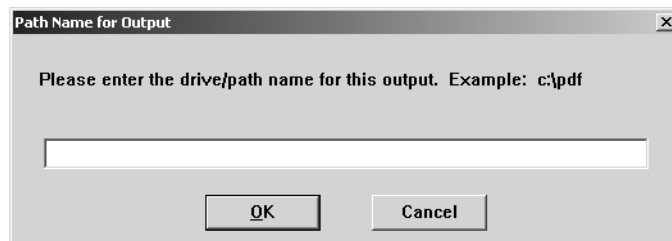
```
path_name = path_name

If path_name = "" Then
    path_name = Input("Please enter the drive/path name for
this output. Example: c:\pdf", "Path Name for Output" )
End

output_to_whom = path_name & "\" & #cnt & "_" & Date("8-2") & "_" &
Time("1b") & ".pdf"

Return(output_to_whom)
```

After the system runs the DAL script, it displays a message similar to the one shown here:



Use this window to enter the path for the output.