WILCOMM

<u>Converting AS/400</u> <u>Spool Files into</u> <u>Spreadsheet format - and</u> <u>Transmitting as Email</u> <u>Attachments</u>



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1. Overview

This WilComm facility will automatically perform these operations:

- 1. Convert an AS/400 spool file into a Comma Separated Variable (CSV) format file, (complete with column headings and control over data selection), and optionally;
- 2. Send the CSV file as an attachment to an email. A number of methods of obtaining an address from the spool text are provided either the actual address, or via a lookup facility.

Benefit – The recipient of the email can simply double-click on the attachment and the file will open in their associated spreadsheet program, eg: MS Excel.

Example

04/28/99		С.	D. TRIAL	BALANC			
					anch: Ood	nadatta	
CUST		CD	CURRENT	ORIGINAL	ACCR.		NEXT
NBR	N A M E	NBR	BALANCE	BALANCE	INT.	RATE	DATE
100093	LAURIE M MILLIGAN	3054	26,297.84	23,968.40	130.59	.07250	07/18/90
101017	JOE OR BEVERLY ROWLAND	1047	10,000.00		232.40	.07250	07/17/90
		1052	10,000.00		232.40	.07250	07/17/90
		3091	10,000.00		126.55	.07450	09/10/90
		3092	10,000.00		126.55	.07450	09/10/90
		3273	10,000.00		232.40	.07250	07/17/90
		3148	10,000.00		275.73	.07400	06/28/90
		3274	10,000.00		232.40	.07250	07/17/90
	** CUSTOMER TOTAL **		70,000.00				
102029	LIZZIE ALTAR	3275	10,000.00		232.40	.07250	07/17/90
		3276	10,000.00		232.40	.07250	07/17/90
	** CUSTOMER TOTAL **		20,000.00				
102293	EDNA RUTH CARTER	1665	5,000.00		157.00	.07300	06/07/90
102337	DESSA MAE MEIER	2908	5,000.00		14.38	.07500	07/29/90
102381	MR OR MRS GUS I. BALDWIN	3142	4,000.00		129.00	.07900	06/15/90
102425	THOMAS G. KLINE	2667	5,000.00		58.08	.08000	09/21/90
		2992	10,000.00		130.93	.08100	09/15/90
	** CUSTOMER TOTAL **		15,000.00				
104097	M D BEDWELL	3201	2,277.19	2,192.39	27.25	.07800	09/18/90
104141	ELMA N BICKFORD	63	1,878.56	6,902.32	9.73	%.00000	07/16/90
	ANITA M OR EDWARD L STEELMAN		14,021.16	8,791.80			05/15/90
104933	DR. OR MRS. B.D. WILSON	3257	11,000.00		316.76	.07350	06/21/90
		3202	12,980.39	12,500.00	151.59	.07750	09/19/90
	** CUSTOMER TOTAL **		23,980.39				

• Sample of the AS/400 spool file report to be converted and emailed as a spreadsheet file -

🔀 Sample CSV File from WilComm - Message 📃 🗖
Eile Edit View Insert Format Tools Compose Table Help
🛛 😰 Reply 🕵 Reply to All 🔩 Forward 🎒 🗈 🔻 📴 🗙 🛧 🔸 🗣 😰
Message Options
From: Bill Smith [williams@major_bank.com] Sent: None
To: manager.oodnadatta@major_bank.com
Cc: Subject: Sample CSV File from WilComm
C.D. TRIAL BALANCE.CSV
Here is your CD Trial Balance
Please click on the attachment, to open it as a spreadsheet.
Regards,
The WilComm Team
¥
🛛 Draw 🗸 😓 🌝 🛛 AutoShapes 🗸 🔪 🗖 🔿 🚰 机 🤌 🗸 🚣 🗸 🚍

• An email similar to the following is sent to the recipient:

• When the attached file is double-clicked, it opens as a spreadsheet as follows:

XM	icrosoft E	xcel - C.D. TRIAL BALANCE.CSV								_	
1	<u>Eile E</u> dit	<u>V</u> iew Insert Format <u>T</u> ools <u>D</u> ata <u>W</u> indow <u>H</u>	elp							_	ЪХ
	A1	CustNbr									
	A	В	С	D	E	F	G	Н		J	
		Customer Name	CDNbr	CurrBal	OrigBal	AccInt	Rate%	NextDate	LastPaid	OrigDate	C
2		LAURIE M MILLIGAN	3054	26,297	23,968	130	0.072	07/18/90	04/18/90		0
3	101017	JOE OR BEVERLY ROWLAND	1047	10,000		232	0.072	07/17/90	01/16/90	07/22/86	01
4			1052	10,000		232	0.072		01/16/90		0
5			3091	10,000		126	0.074	10/09/90		03/13/89	11
6			3092	10,000		126	0.074	10/09/90		03/13/89	1
7			3273	10,000		232	0.072			01/16/90	
8			3148	10,000		275	0.074	06/28/90			O
9			3274	10,000		232	0.072	07/17/90	01/16/90	01/16/90	01
10		** CUSTOMER TOTAL **		70,000.00							
11											
12	102029	LIZZIE ALTAR	3275	10,000		232	0.072			01/16/90	
13			3276	10,000		232	0.072	07/17/90	01/16/90	01/16/90	0
14		** CUSTOMER TOTAL **		20,000.00							
15											
16		EDNA RUTH CARTER	1665	5,000		157	0.073		07/12/89		
17		DESSA MAE MEIER	2908	5,000		14	0.075		04/29/90		
18		MR OR MRS GUS I. BALDWIN	3142	4,000		129	0.079	06/15/90	12/15/89		O
19	102425	THOMAS G. KLINE	2667	5,000		58	0.080		03/21/90		
20			2992	10,000		130	0.081	09/15/90	03/15/90	09/15/88	0
21		** CUSTOMER TOTAL **		15,000.00							
22											
23		M D BEDWELL	3201	2,277	2,192	27	0.078			09/18/89	
24	104141	ELMA N BICKFORD	63	1,878	6,902	9	0.000	07/16/90	04/16/90	01/16/84	0 🗸
	▶ N\C.I	D. TRIAL BALANCE			1						•
Read	dy								NUM		

You may note some format changes, e.g. the cents have been omitted. These changes are deliberate.

2. Operation

Summary of operational steps, once job is set up -

1st Step

The WilPrint module prints the spool file to the Windows spooler, using the Generic /Text only printer driver.

During this print step, the desired print lines are converted into CSV format (by a command executed during the forms merge) and written to a disk file in the NT spooler. As there is no printer connected to this spooler, the file will remain there until we access it in the 2nd Step.

If no emailing is required:

If you wish to make use of the CSV file locally and have no need to send it via email, this is the end of processing. The CSV file will be found in the directory named: C:\WinNT\System32\Spool\Printers. It will have a file name similar to 00001.SPL. The extension of ".SPL" means "spool". The highest file number there will be the most recently created file.

Use Explorer to alter the file extension from ".SPL" to ".CSV" then double-click on the file to open it with your favourite spreadsheet program.

2nd Step

WilMail picks up the CSV file from the Spooler, obtains the email address and emails it with a 'cover sheet', as a text attachment.

The address for the email must be extractable from within the spool text - either as an exact address, or via a lookup.

How to Set Up a New Job -

1. Plan the spreadsheet layout:

Decide on the desired column layout for your spreadsheet. We suggest that you print a page of the AS/400 report and (working from left to right) mark each column that you wish to include in the CSV file, with "A", "B", "C" etc, being the columns you want to put the text into on a spreadsheet. Keep this sheet handy for when you "map" this data into the spreadsheet's Column A, Column B etc, using the WilComm Field Mapper program.

2. Create a new "form" for this job and personalise it:

During the installation of WilComm, a general purpose CSV template form named "CSV Master.f3t" will have been placed in the default forms directory "Program Files\Wilkinson\WilComm Universal\F3Forms\Forms". Start the WilComm Forms Designer program and open this form "CSV Master.f3t".

• Use "Save As" to make a copy of this form and name the new form according to your CSV job. For the example that we will now work through, which is a report named "C.D. Trial Balance", we will use the name: "CSV CD Trial Balance.f3t".

3. Specify column headings, report name and email address

• With the newly copied form named "CSV CD Trial Balance.f3t" open in Forms Designer, select *Edit/Edit Variables* to display the list of form variables that are set up in the supplied master CSV form. (Tip: For fast access to Edit Variables, simply press ALT/E then E again).

• You will see the following:

WilComm Forms Designer - [CSV CD Trial Balance.f3t] File Edit View Page Draw Arrange Object I able Window Help
C Edit variables for a form
New or Selected Variable Col A
New Delete Duplicate
Variable Names
Col A Col B Col B
- ColC O Number C galculation 2 - ColD ColD ColD ColD ColD ColD ColD ColD
□ □ □ □ □ 3 □ ○ Variable ○ Eixed 0 Variable ○ Eixed □ 0 55 values
ОК
Ready NUM
Start 同C:\

Slide to the bottom of the Variable Names list until the variable: **Headings+ReportName+EmailAddress** appears. Select it as follows:

Edit variables for a form		×
New or Selected Variable Heading	gs+ReportName+Er	mailAddr
<u>N</u> ew <u>H</u> enam	ne <u>D</u> elete	D <u>u</u> plicate
Variable Names	- Data Types	
	O <u>⊺</u> ext	© Database⊻ariable
Col_Z DetailLine	O Nu <u>m</u> ber	• <u>C</u> alculation
EmailAddress Headings+ReportName+	◯ D <u>a</u> te	C Summary
Q ReportName	O Tjme	<u>Options</u>
Data Length	🗖 R <u>e</u> p	eating variable with a maximum
• Variable • • • • • • • • • • • • • • • • • • •	of	values
		ОК

• Click on the "**Options**" button. This screen appears:

Set expression for calc	ulated variable "Hea	dings+Repo	rtName+Email	Ad 🗵
Variables C Col_A Col_B Col_C Col_C Col_D Col_E Col_F Col_G Col_H Col_I Col_J Col_X Col_L Col_K Col_L Col_N Col_N Col_O	() 7 8 9 + · 4 5 6 × / 1 2 3 □ · 0 . Variable value is equal to: G ¹¹ +c+ "Report:" + Re			Address ncel

Specifying the "Headings+ReportName+EmailAddress" information

You will notice that the input field named: "**Variable value is equal to:**" is highlighted and has been pre-loaded with some values.

Note:The final values in this field will be used as the first record of the CSV file. When the CSV file is "opened", they become the column headings of the spreadsheet.

Explanation of "Headings+ReportName+EmailAddress" values

There are three sets of values:

1. Headings ("Col_A", "Col_B", etc)

You may leave these headings as they are, but it is generally preferable to replace them with more meaningful headings to personalise your spreadsheet column names.

Steps to personalise the spreadsheet with column headings

(i) Press the **HOME** key to bring "Col_A" into view.

G Tip: Be careful, as there is no Undo key for this particular operation! If you accidentally delete some default codes, you can open the CSV Master.F3T form, and copy/paste from there.

- (ii) Type the new heading for your first column on top of the text: "Col_A". Take care to retain the pair of enclosing quotes.
- (iii) Continue this process with "Col_B", then "Col_C", etc, until you have specified all your desired column headings by replacing the default headings.
- (iv) Delete any of the unused default headings, ie: if the last heading you replace is "Col_J", you should delete all the text from: +c+ "Col_K"

 \dots to \dots "Col_Z". Take care not to delete the items that follow the "Col_Z".

(v) You might end up with a completed string that looks like this:

"CustNbr" +c+ "Customer Name" ... (etc) ... +c+ "TOFG" +c+ "Report: " + ReportName +c+ "Email: " + EmailAddress

This would be converted as follows, and become the first record of the CSV file:

CustNbr,Customer Name, ... (etc) ... ,TOFG,Report: C.D. TRIAL BALANCE,Email: Oodnadatta

Note:Ensure you do not disturb the pattern of the "+c+ " codes. These are important to ensure that the forms macro will function. (The "+" is a joiner code that instructs the merge process to join the text string that occurs before the "+" with the text string that follows. The "c" is a comma code that simply gets replaced by a comma during the merge). If you accidentally delete a "+" or a "c" you can just type it back in.

- 2. Report Name ("Report: " + ReportName)
 - <u>The text string: "Report</u>: "

This instructs WilComm to place the word "Report: " in the CSV file, at the right hand end of the first line (which is the heading line). The WilComm Pickup function (in the Distribution Wizard is set up to look for the word "Email: " as its anchor-point when locating the email address. Please see next item.

• <u>The text string: + ReportName</u>

This instructs WilComm to place the report name into the first line of the output CSV file, straight after the word "Report: ". You will be able to specify the line and column numbers for extracting this report name from the print page, in the Field Mapper. This is explained in a separate User Guide.

Examples of the report name, as it might be output on the first line of the CSV file:

(i) Report: 24680

(The above is an example of having extracted a string that is an invoice number, or;

(ii) Report: C.D. TRIAL BALANCE

(In this example, part of the page heading text was extracted for use as the report name).

Note that for better appearances, there is a single space between the word "Report: " and the start of the address. This is a minor point, but is relevant when specifying the addressing setup in the Distribution Wizard.

- 3. <u>Email Address</u> ("Email: " + EmailAddress)
 - The text string: "Email: "

This instructs WilComm to place the word "Email: " in the CSV file, at the right hand end of the first line (which is the heading line). The WilComm addressing function (in the Distribution Wizard is set up to look for the word "Email: " as its anchor-point when locating the email address. Please see next item.

• <u>The text string: + EmailAddress</u>

This instructs WilComm to place the email address (or look-up key) into the first line of the CSV file, straight after the word "Email: ". You will be able to specify the line and column numbers for extracting the email address or look-up key from the print page, in the Field Mapper. This is explained in a separate User Guide.

Two examples of the email addresses, as it might be output on the first line of the CSV file:

i. Email: Oodnadatta

(The above is an example of extracting a string that will be used to look up the mail address from the WilComm Address Book), or;

ii. Email: <u>thomasb@abc.com</u>

(In this example, the actual email address was available in the page text, so it has been extracted).

Note that for better appearances, there is a single space between the word "Email: " and the start of the address. This is a minor point, but is relevant when specifying the addressing setup in the Distribution Wizard.

4. Save the changes:

When finished, click **OK** to save the changes to:

"Headings+ReportName+EmailAddress" and revert to the "Edit variables for a form" screen. If you do not need to alter the lines per page setting (see next item), click **OK** and return to the main Forms Designer screen. Save the form and exit the Forms Designer program.

Note:If you get this message:

Note: ... this would suggest that the pattern of "+" and "c" has been upset, ie: among the strings of "+c+ " there is a missing " + " or a missing " c " etc. Correct the error and try again until you can properly save your work.

5. Adjust number of lines per page:

By default, WilComm will output 55 lines in the CSV file for each spool page processed. If the maximum number of detail lines on your report pages is less than 55, the CSV file will contain one or more blank lines at the bottom of every page. E.g. if your report has 50 detail lines, there will be 5 blank lines per page.

This may be quite acceptable to you, in which case there is no need to make any adjustment - just move ahead to item 6. You can avoid unwanted blank lines by altering a form setting (via the Forms Designer) so that it equals the correct lines per page for your report. If the "Edit variables for a form" screen is <u>not</u> currently displayed, ensure the correct form is open, and then use *Edit/Edit Variables* to display it.

Select the variable named "DetailLine". You will see in the lower right hand corner, a field labelled "Repeating variable with a maximum of <u>55</u> values". You must alter this figure to equal the number of detail lines in your report. E.g. if your report has 50 detail lines, enter 50 in place of 55.

When this is done, click **OK** to save the changes and revert to the main Forms Designer screen. Save the form and exit the Forms Designer program.

Edit variables for a form		×
New or Selected Variable DetailLi	ne	
<u>N</u> ew <u>R</u> enam	e <u>D</u> elete	Duplicate
Variable Names		
CoLV	-Data Types	
	O <u>⊺</u> ext	© Database <u>V</u> ariable
	O Nu <u>m</u> ber	• <u>C</u> alculation
DetailLine	⊖ D <u>a</u> te	C Summary
EmailAddress Headings+Email:(addres: Q	O Tjme	(<u>Options</u>)
Data Length		
• Variable O <u>F</u> ixed	IM Rep of	eating variable with a maximum 55 values
		ок

6. Create the form variables file (xxx.F3X)

Use Windows Explorer to create a copy of the file "CSV Master.F3X" which is also installed in the ...\F3Forms\Forms directory. Name the copy to be the same name as your new CSV job, but with an extension of ".F3X", eg: "CSV CD Trial Balance.f3x".

Note:This "CSV Master.f3x" file has been specially prepared to perform the CSV process. It is important to use the supplied file rather than creating it in the manner of a normal form.

- Use Notepad to edit the first record in this file, which initially contains:
- C:\Program Files\Wilkinson\WilComm Universal\F3Forms\Forms\CSV Master.f3t

Replace "CSV Master.F3T" with the name of your file, e.g. "CSV CD Trial Balance.f3t".

7. Field Mapper

You are now ready to use the Field Mapper program to "map" the report text into the columns in WilComm's standard CSV form layout (the one you created for this job by copying CSV Master.f3t). These columns are simply named Col_A, Col_B etc. We are able to use just these generic column names, as WilComm will output the personalised column headings that you set up in step 2 above, directly into the first record in the CSV file. Your spreadsheet program will then use these to personalise the job.

The Field Mapper allows you to easily specify:

- Exactly what text is to be extracted from the page, and into which spreadsheet column it is to be placed.
- The report's page and column headings can either be included or excluded.
- Whole columns of data can be re-arranged, omitted or duplicated.
- The minus sign that typically trails a numeric field to indicate a negative value may be re-positioned in front of the numeric field, to comply with requirements of some spreadsheet programs.
- Conditional printing logic allows selection of text based on various and multiple tests, including global presence/absence checks, boolean tests etc.
- If the CSV file is to be automatically emailed, the Field Mapper program is used to map the email address (or a key field for use in the WilComm address book lookup) from the page text to the form variable named: EmailAddress.

For details on using the Field Mapper, please refer to the WilComm Forms User Manual, Chapter 3 - The Mapping Procedure, after reading the following note.

Please Note:

- When reading the WilComm Forms User Manual, where it makes a distinction between the WilComm Server Vsn 2.5 and Vsn 3.x, you should follow the Vsn 3.x instructions.
- Please read all chapters in this User Manual to gain a general appreciation of the system.
- The main function that you will use is "Defining a Field Map entry for a Table Column". Basically, you will just drag over the first column of sample text, and then release the mouse button. A drop-down list of all the form's variables will appear. Click on the variable "Col_A". What this does is place all the lines of text for this first column into Column A of the CSV file, and hence into the spreadsheet. This process is then repeated for the second column, and so on.
- Email Address: You must identify a string of text somewhere on the page that can be used to get an email address. It can either be an actual email address (e.g. "joeblough@northpole.com") or a string to be used to look up an address in the WilComm Address Book (e.g. "New York Branch"). Drag over the desired text string and map it to the variable "EmailAddress".
- **Detailed examples:** Numerous print screens of the major Field Mapper setups for the CD Trial Balance job are included in an addendum titled "Field Mapper Setup Examples".

Now you are ready to create your Field Map file. Please do this now, and then return to the next item.

8. Distribution Wizard Set-up:

The Distribution Wizard is a program that allows jobs to be defined to the WilComm server by specifying how each job is to be recognised, then how it is to be dealt with. It is important to have a general understanding of the facilities it provides. To gain this knowledge, please read the WilComm Forms System Manual, Chapter 4 - The Distribution Wizard.

Two Distribution Wizard "sections" must be set up for each CSV job. One section that gets WilPrint to create a CSV file in the PC Spooler, and a second in which WilMail sends the Spooler .SPL (CSV) file as a text attachment.

The Distribution Wizard file that is loaded on the WilComm server via the installation process contains two such sections for handling the CD Trial Balance Report example. The major aspects of these are described below, via a series of screen prints, with just a brief narrative to explain the key items.

<u> (</u> w	/ilComm Distributio	n Wizard	_ 🗆 🗵
<u>F</u> ile	<u>E</u> dit Help		
Ľ	*	💁 🖢 🦻 🔛 🛛 💦	
Se	ection Code	Section Description	
	CSV CdtbPt	CDTB Report - WilPrint creates CSV file in NT Spooler	
	CSV CdtbEm	CDTB Report - WilMail sends NT Spooler .SPL (CSV) file as text	attach't.

(i) WilPrint creates a CSV file in the PC Spooler.

Steps:

- (i) Create a new "section".
- (ii) At the first two option screens, press **NEXT**.
- (iii) At the "Set Attribute Conditions" screen, you may wish to specify the formtype, etc of your job. (Refer to the main User Guide). Then press **NEXT**.
- (iv) Take the option " I want to define data conditions". This allows rules to be specified as to how the job can be recognised.

VilComm Distr <u>File E</u> dit <u>V</u> iew <u>I</u>		B Report - WilPrir	nt creates CSV file in NT	<u>- D X</u>
	<u>38 💀 5</u>	¥ 🔁	▶?	
🖥 Sample File: (C:\Program Files\Will	kinson\WilComm U	niversal\F3Forms\Samp	le Spool File
Line: 4	Column: 65	Width:	Height:	Pap
CUST NBR 100093	20/99 N A N LAURIE M MILLIGAN JOE OR BEVERLY RC		C. D. T R I CD CURRENT NBR BALANCE 3054 26,297.84 1047 10,000.00	ORIGI BALAN 4 23,96
	a Conditions Setting er/String Value	In	Anywhere on the P	Target Da age

Comment: The data condition that was applied is that the text string: "C. D. T R I A L" has to exist anywhere on the page. We know this text occurs on each of the pages in our spool file.

(v) At the "Service Selection" display, select the Print service.

🐴 WilComm	Distribution Wizard - [CDTB Report - WilPrint creates CSV file in NT 💶 🗖	x
<u>F</u> ile ⊻iew <u>F</u>	Help	
	🔄 📲 🎘 🔁 🛛 💦	
	Service Selection	
	Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service	_
	Print	
	General Address Form	
	Service Program: Any WilPrint Service Program	Ĺ
	Print Format Text in Form C Plain Text	o I
	Duplex Print © Simplex © Horizontal © Vertical	٦2

Comment: Accept the above defaults. No changes are needed.

(vi) Press the Address tab. Choose "Pre Defined Printer Name" and pick the Generic / Text Only printer driver. This printer driver must be installed on the PC, and in the Printer Properties, the Port for this printer must be set to "File". Other default settings for the printer may be left as is, as they do not matter. If this printer driver is not currently installed, please do so now from your NT installation disk. In case this is not at hand, the necessary files may be found on the WilComm CD in the file "...\Utilities\Generic Text Only Prt Drvr.Zip".

🐴 WilComm I	Distribution Wizard - [CDTB Report - WilPrint creates CSV file in NT 💶 🗖	
<u>F</u> ile ⊻iew <u>H</u>	elp	
	🏄 🛃 🗭 🔁 🛛 💦	
	Service Selection	
	Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service	
	Print 🔽	F
	General Address Form	
	Select one of the following printer names: PreDefined PrinterName: Generic / Text Only	Ŭ
	C Host Address	
	C Fixed Address Details	ĺz
	C Floating Address Details	
	C Look-up Address Details	
		F

(vii) Press the Form tab. Fill in the prompts as follows:

Form Name: From the drop-down list, select the form you created in step 2.

Field Map Name: From the drop-down list, select the field map you created in step 7.

Resolution: Any setting is OK.

Orientation: Must be Landscape

🌆 WilComm	Distribution Wizard - [CDTB Report - WilPrint creates CSV file in NT 💻	⊐×
<u>File View H</u>	elp	
	Service Selection	
	Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service	
	Print 💌	F
	General Address Form	
	Form Name: CSV CD Trial Balance	
	FieldMap Name: CSV CD Trial Balance	Р
	Resolution: High	
	Orientation O Portrait O Landscape	ĺz
	🗖 Data Only	F

Comment: The above display has been completed correctly for our example CSV task.

This completes the Distribution Wizard setup for the first step, whereby WilPrint will create a CSV file in the NT Spooler.

(ii) WilMail sends the Spooler .SPL (CSV) file as a text attachment.

🐴 WilCo	mm Distributior	i Wizard
<u>F</u> ile <u>E</u> dit	Help	
		<u>a 2 7 5 5</u>
Section	Code	Section Description
🗶 CSV	CdtbPt	CDTB Report - WilPrint creates CSV file in NT Spooler
K CSV	CdtbEm	CDTB Report - WilMail sends NT Spooler .SPL (CSV) file as text attach't.

Steps:

- 1. Create a new "section".
- 2. At the first three option screens, press **NEXT**.
- 3. Take the option " I want to define data conditions". This allows rules to be specified as to how the job will be recognised.

When setting this up, bear in mind that the file that is being processed is the CSV file that was created in step 1. Therefore the first record will contain the "Headings and Email Address" details as specified in step 1.

We use our knowledge of this layout to recognise the job.

E.g. for our example, we know this column heading line will contain a heading of "CDNbr".

You should pick on a string such as this, which is unusual text, rather than a string such as "Customer" that might occur in more than one report. You can also include the commas at either end of the heading name, for further recognition clarity, e.g. ",CDNbr,".

D 💕 🖬	<u> </u>	ಶ 🏂		<u></u>	
Sample File:	C:\Program File:	s\Wilkinson\Wil	Comm Universal\F	3Forms\Sample Spoo	l Files\CSV 💶 🛛
Line: 10	Column: 84	Width:	Height:	Paper Size: 56 Li	ns × 165 Cols
*100093*********************************	,"LAURIE M MI ,"JOE OR BEVE 052"," 10,000 091"," 10,000 092"," 10,000 273"," 10,000 273"," 10,000 274"," 10,000	LLIGAN RLY ROWLAND ","," 232",' ",","," 126",' ",","," 232",' ",","," 232",' ",","," 232",' ",","," 232",'	", "3054" ", "1047" .072", "07/17/90 .074", "09/10/90 .074", "09/10/90 .072", "07/17/90 .072", "07/17/90 .072", "07/17/90	', "26,297", "23,96 ', "10,000", "", "2 1", "01/16/90", "07 0", "03/12/90", "07 0, "03/12/90", "03 0, "03/12/90", "03 0, "01/16/90", "01 0, "12/28/89", "06	F
Result of Da	ta Conditions Se	tting	_	5	

Comment: This data condition will filter out any jobs that contain the string ",CDNbr," anywhere on the page. We could pin it down more by specifying that this search string must occur on line 1 or line 2, but the time taken to find it anywhere on the page is so fast it does not matter!

4. At the "Service Selection" display, select the Email service.

WilComm Distribution Wizard - [CDTB Report - WilMail sends N 💶 🗖 🗙
Service Selection
Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service
E-Mail
General Mail Message Address Form Attachment
Email Format
C Email the file as message body text
C Email the file as a text attachment
Merge the file pages with F3Forms, then email forms as attachment files
C Convert PostScript file into a PDF file, and email the PDF file as an attachment
Email the file as a CSV attachment
Service Program: Any WilMail Service Program

You will be at the **General** Tab. For the "Email Format" options, select "Email the file as a CSV attachment". This ensures that the attached file is given a file extension of ".CSV".

Select the **Address** tab.

We can choose either Floating Address or Look-up Address, depending on whether in the 1st step (WilPrint) we extracted an actual email address, or a key to be used for a table lookup.

Look-up Address: In our example case, we extracted a key, so we have selected **Look-up Address**. Next we select **Details**:

🌆 WilComm D	istribution Wizard - [CDTB Report - WilMail sends NT Spooler .SPL 💻	
<u>F</u> ile ⊻iew <u>H</u> el	lp	
	🥶 👦 🥐 边 🛛 💦	
	ervice Selection	
	Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service	
	E-Mail	
ļ	General Mail Message Address Form Attachment	
	Select one of the following addresses:	6
	C Host Address	\mathbb{P}^{\perp}
	C Fixed Address Details	19
	C Floating Address Details	J Lz
	Look-up Address Details	
-		
<u> </u>		-

The Look-up address reference string" that we wish to use is "floating", to the extent that we are not certain in which column it starts in the CSV file that we will be analysing. So we select "Floating".

If the whole CSV file is to be sent to the address that is resolved for the first page, check the option at the foot of this display. If some pages are to be sent to a different destination, leave it un-checked.

🖼 Look up address 📃 🗆 🗙
Use one of the following reference string to look up WilComm address book for proper address for this service:
Look-up address reference string
O Attribute
O Fixed string Details
Floating string Details
Apply the address resolved for the first transaction file page to all other pages.
<u> </u>

Click on **Details...**

We can now specify the area in the CSV from which the reference string is to be extracted. We do this by first specifying an anchor point, then saying how many characters to the left or right, and how many lines up or down (or on the same line), WilComm is to look for the string to be extracted. Bear in mind that here we are not extracting the actual e-mail address, but a string to be used to look up the e-mail address in the WilComm Address Book.

In our example case, we search for the string ",Email:" as the anchor point. We know that the reference string (which is the Branch name "Oodnadatta") starts just one space after the colon in the word "Email: ". By counting the spaces we know that the "O" of Oodnadatta start in the 8th position on the same line and on the right of the start of ",Email:". (The comma at the start of ",Email:" is position zero). Here is the right hand end of the text line:

..., Email: Oodnadatta

So, we have filled in the example parameters as follows:

Floating Reference String				
Using the location where the following string is	found:			
,Email:		🗖 Case Sensitive		
Pick-up area from which the reference string in Horizonal Position ○ On the left hand side of the string area ○ On the right hand side of the string area Distance: 8	s to be (AND	extracted Vertical Position O Above the string area O Below the string area Distance: 0		
And the width of this addressing area is		<u>O</u> K <u>C</u> ancel]	

Comment: Regarding the width of the addressing area, this should be set high enough as to cater for the largest field that might be encountered. Thirty five has been entered in the example. Trailing blanks will not cause any problem in the look-up process.

Address Book. Ensure that you have an entry in the WilComm Address Book for each lookup key that WilComm is likely to find in the CSV file. You can easily import entries into this Address Book by using **Tools / Import Customer entries**. This enables the contents of other databases to be imported as CSV files. For our example job, we created an address for the Oodnadatta branch office as follows:

<mark>≪il</mark> WilComm Configur nas <u>File Edit Vi</u> ew <u>1</u>		ook]						_ 8 ×
		<u></u>						
Customer Code 000402 246890	Fax Number 4444-55555 Editing Address	Email Address murrav@wilkins Book Entry	Printer Name Acrobat Distille	Telex Nur r	nber	Phone Number	Company	Address
25 ACE MANUFACTURIN. Fred Nurks moirac	Customer Code: Fax Number:	0odnadatta		First Name: Last Name:				
Oodnadatta for doco The Directors	Email Address:	manager.oodnadatta(@major_bank.	Company:				
	Printer Name:		_	Address:				
	Telex Number: Phone Number:			City: State:				
	Comtext Address:			Zip:				
			<u>0</u> K	Country: <u>C</u> ancel	I			
<u>د</u>								Þ
Start C	säwi∟ (≣win.	. 🔊 Expl., 🎆 ZTr		🗙 Mier 🛛 🌌	will. I 1	Wier	<mark>4:28:00</mark>	

Run the example file:

You may wish to run the example job through your WilComm system so as to create the CSV file, and email it to yourself. To prepare for this, you must create an entry for Oodnadatta in the Address Book as per the above, but with your own email address rather than WilliamS@major_bank.com.

Floating Address:

If, in the 1st step (WilPrint), you had extracted an actual email address, such as "joeblough@northpole.com", you would select "Floating Address" in the Address panel below:

🐴 WilComm I	Distribution Wizard - [CDTB Report - WilMail sends NT Spooler .SPL]	_ 🗆 ×
<u>File View H</u> e	elp	
	<u>3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1</u>	
_	ervice Selection	
	Please choose a service type for this session. Every task which meets the session configuration settings you specify will use this service	
	E-Mail	
	General Mail Message Address Form Attachment	
	-Select one of the following addresses:	
	Host Address	
	O Fixed Address Details	12
	Floating Address Details	
	C Look-up Address Details	

After clicking on **Details**, we are able to specify the rules for WilComm to pick out the actual email address from the page text. See the "Floating Address" screen below.

🐃 Floating Address			×
Using the location where the following string is	found:		
,Email:		🗖 Case Sensitive	
Pick-up area from which address is to be extra	cted		
 Horizonal Position On the left hand side of the string area On the right hand side of the string area Distance: 8 	AND	Vertical Position O Above the string area O Below the string area Distance:	
And the width of this addressing area is			-
Apply the address extracted from the first p	age to a	all other pages.	
		<u>O</u> K <u>C</u> ancel	

Let us assume that this text appears at the right hand end of the text line:

,Email: joeblough@northpole.com

Comment: The method of filling in these parameters is the same as for completing the "Floating reference string" in the preceding item. The only difference is that here, we are specifying where the **actual** email address is located, rather than a string that will be used as a key to look up the address.

Sample

This is typical of a CSV file layout as written into the Windows spooler by the first step (WilPrint). The second step (WilMail) automatically picks up this file and sends it as a text attachment to an email.

"Left hand side" of the records:

🗒 CSV csv CD Trial Balance.MAP - Notepad	_ 🗆 ×
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>H</u> elp	
CustNbr,Customer Name,CDNbr,CurrBal,OrigBal,AccInt,Rate%,NextDate,LastPaid,Or	rigDate 🔺
"100093","LAURIE M MILLIGAN ","3054"," 26,297","23,968"," 130","	'.072″,'
"101017","JOE OR BEVERLY ROWLAND ","1047"," 10,000",""," 232",".072",	,"07/17.
"","","1052"," 10,000",""," 232",".072","07/17/90","01/16/90","07/22/86","07/	/17/90"
"","","3091"," 10,000",""," 126",".074","09/10/90","03/12/90","03/13/89","09/	/10/90"
"","","3092"," 10,000",""," 126",".074","09/10/90","03/12/90","03/13/89","09/	/10/90"
"","","3273"," 10,000",""," 232",".072","07/17/90","01/16/90","01/16/90","07/	/17/90"
"","","3148"," 10,000",""," 275",".074","06/28/90","12/28/89","06/29/89","06/	/28/90"
"","","3274"," 10,000",""," 232",".072","07/17/90","01/16/90","01/16/90","07/	/17/90"
""," ** CUSTOMER TOTAL ** ",""," 70,000.0","","","","","","","","","","","","","	<i>''','''</i>
"","","","","","","","","","","","","",	
"102029","LIZZIE ALTAR ","3275"," 10,000",""," 232",".072",	,"07/17.

"Right hand side":

🗉 CSV csv CD Trial Balance.MAP - Notepad	
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>H</u> elp	
<pre>igDate,CurrMaty,TYCD,TOFG,Report: C. D. T R I A L B A L A N C E,Email: 0odnadat .072","07/18/90","04/18/90","01/18/89","07/18/90","3","0","" "07/17/90","01/16/90","07/22/86","07/17/90","3","1","" 17/90","3","1","" 10/90","3","0","" 10/90","3","0","" 17/90","3","0","" 28/90","3","0","" 17/90","3","0",""</pre>	ta
"07/17/90","01/16/90","01/16/90","07/17/90","3","0",""	-

You may wish to run the example CSV CD Trial Balance job as a trial. Please contact your WilComm Reseller for instructions.

3. Operating Notes

This dialog screen will display when WilPrint processes the first job. It is a normal message when using this Generic / Text Only printer driver. Do not reply to this message. Keep it displayed so that it acts as a "door opener", allowing following print jobs to be processed by WilComm.

Printers	Folder 🗙
8	Error writing to LPT1: for Document CSV CD Trial Balance: The device is not ready.
	Do you wish to retry or cancel the job?
	<u>Retry</u> Cancel

Simply re-run your first job through WilPrint again, and it (and all subsequent jobs) will be processed properly through this step.

You will see messages similar to these in the WilComm Server's logging window:

Moving transaction file 00004.SPL from: \WINNT\System32\Spool\Printers to ...

Can't move the transaction file -- DLL error: 32

This is a result of the above Printers Folder error message. It is only a warning from WilComm that it cannot pick up the spool file (because it has the above dialog box open). This warning can be safely ignored.

Each CSV job that is processed will create an entry in the printer queue for the Generic / Text Only printer. These entries should be periodically removed by clicking the printer icon on the task bar, then selecting Printer /Purge Print Documents. This will avoid having to answer each of the Printers Folder error messages, once for each print job. The purge step will remove all jobs except the very first, which will only be cleared when the dialog box is answered with a Cancel option. This can be done when the PC is to be shut down.

Note: The Spooler into which the Generic Text printer driver prints its jobs must not have other printer drivers also printing thru the same Spooler. If this rule is not followed, the second WilComm step, where WilMail picks up all the *.SPL files from the Spooler, will collect **all** the print jobs including those it should not!

Note: The remedy is to create a separate spooler from the standard NT spooler. We could call it a "private" spooler. Such a spooler can be set up via RegEdit. Instructions for this are included below..

Setting up a separate "private" spooler to the normal NT spooler

If you require to print an application's output to a spooler that does not have other printed output passing through it, you can create a "private spooler". This will be quite separate to the standard NT spooler.

To do this, follow these instructions.

To override the default location for one specific printer

- 1. Start the Registry Editor (REGEDT32.EXE), and find the following key: HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Print\Printers.
- 2. Find the key for the printer.
- 3. Add a new SpoolDirectory setting, and as its value provide the path to the spool directory that this printer should use.

The change in the Registry takes effect after you stop and restart the Spooler service.

Note: Once you set up a "private" spooler, all print files from the Generic /Text Only printer driver will be directed to a specific directory such as: C:\WilComm-NT-Print-Spooler-A.