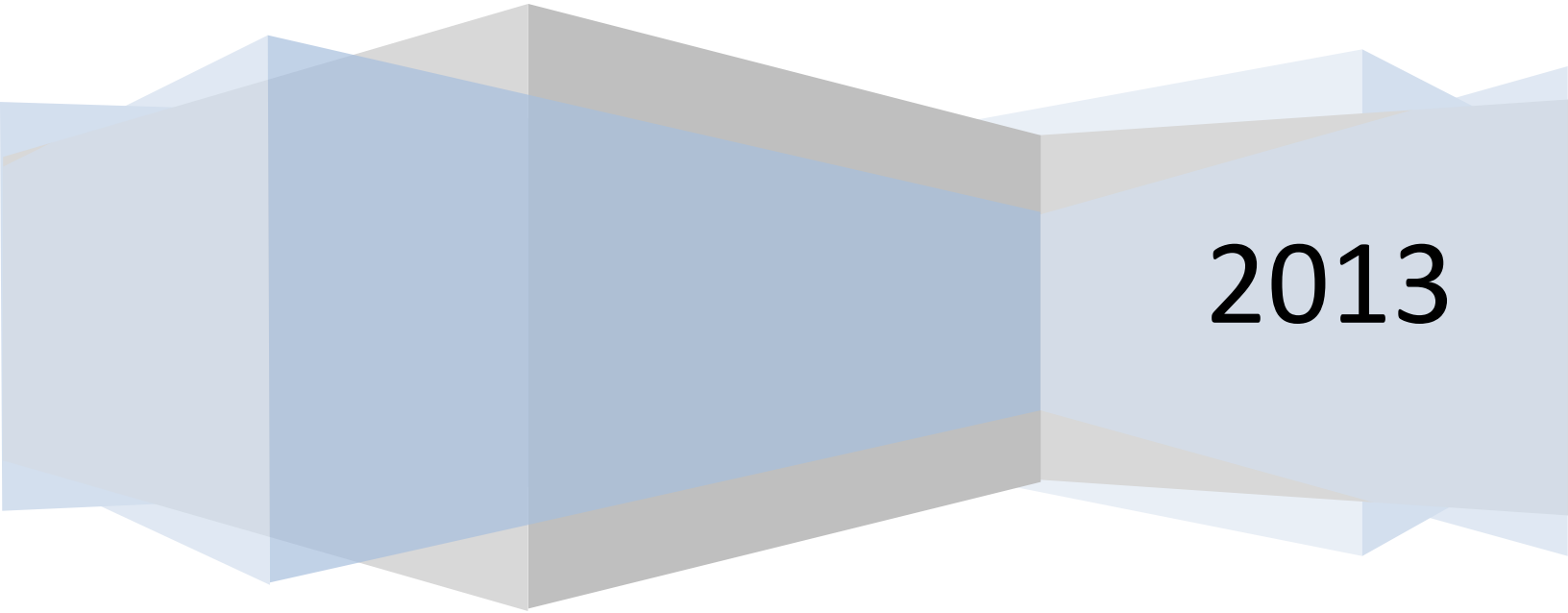
b2Win 8.0

User Guide – Baan IV/Ln/BaanERP

NAZDAQ – Nazareth Data Quest



2013

Contents

1 Getting Started 4

1.1 How to use this guide 4

1.2 The b2Win device 5

2 Convert Buttons 7

3 Report Customizer 8

3.1 Open Customizer 8

3.2 Delete Customize 8

4 b2Diz – PDF Report Designer 9

4.1 Open Design 10

4.2 Delete Design 12

5 Mode 13

5.1 Table 13

5.2 As-is 13

5.3 Macro 14

5.4 Native Format 14

5.5 Plain Text 15

5.6 Custom Design 15

5.7 Standard 15

6 Actions 16

6.1 Launch 16

6.2 Archive 16

6.3 Send 16

7 Send to b2Email Plus 17

8 Formatting 19

8.1 Logo 19

8.2 Font 20

8.2.1 Font Scale 20

8.3 Background 20

8.4 Signature 21

8.5 PDF Settings 21

8.5.1 Secure PDF 23

8.5.2 Line Spacing 23

8.6 Options 24

8.6.1 Set File name 24

8.6.2 Update Components 24

8.6.3 Option Help 25

8.7 Defaults 25

8.7.1 Save defaults 25

8.7.2 Clear defaults 25

9 General Information 26

1 Getting Started

1.1 How to use this guide

This guide will take the users through *b2Win from* different points of view, and help you optimize it to best fit your needs.

We will go through the most basic features of running *b2Win,* while getting to know all the options within the *b2Win* device and automating the *b2Win* conversion process.

This guide describes how *b2Win* converts reports to table format; it is most commonly used to convert reports to Excel. Some reports can be converted without any additional work, using the *b2Win* smart converter, while others require configuring using the ***b2Win Report Customizer***. Chapter 3 describes the different steps required to enable the ***b2Win Report Customizer*** and how to best use it with different report styles.

Chapter 4 introduces the **b2Diz – The PDF Report Designer**, using this add-on can produce PDF files with different font size, type and color, and can change and move text from the original layout. This is performed using a friendly interface that makes report design an easy and quick task. You must license the ***PDF Report Designer*** for this.

Chapter 8 shows the integration process between *b2Win* and *b2Email Plus* and how you can use it to e-mail, fax or print from *b2Win*.

1.2 The b2Win device

b2Win is installed as a device inside BAAN server, and can be opened whenever you want to print a report from BAAN

1) You just need to specify the device name ***b2Win 8*** inside device field

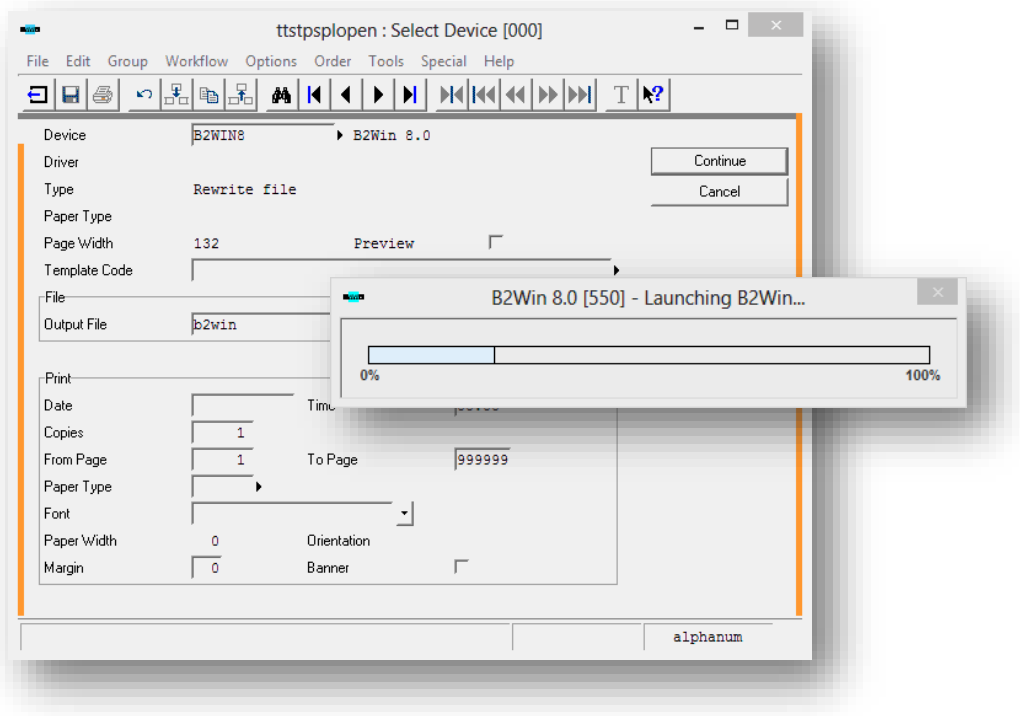


Figure 1 - Chose the device b2Win 8

2) After you have selected this device and clicked on continue, *b2Win* will be opened

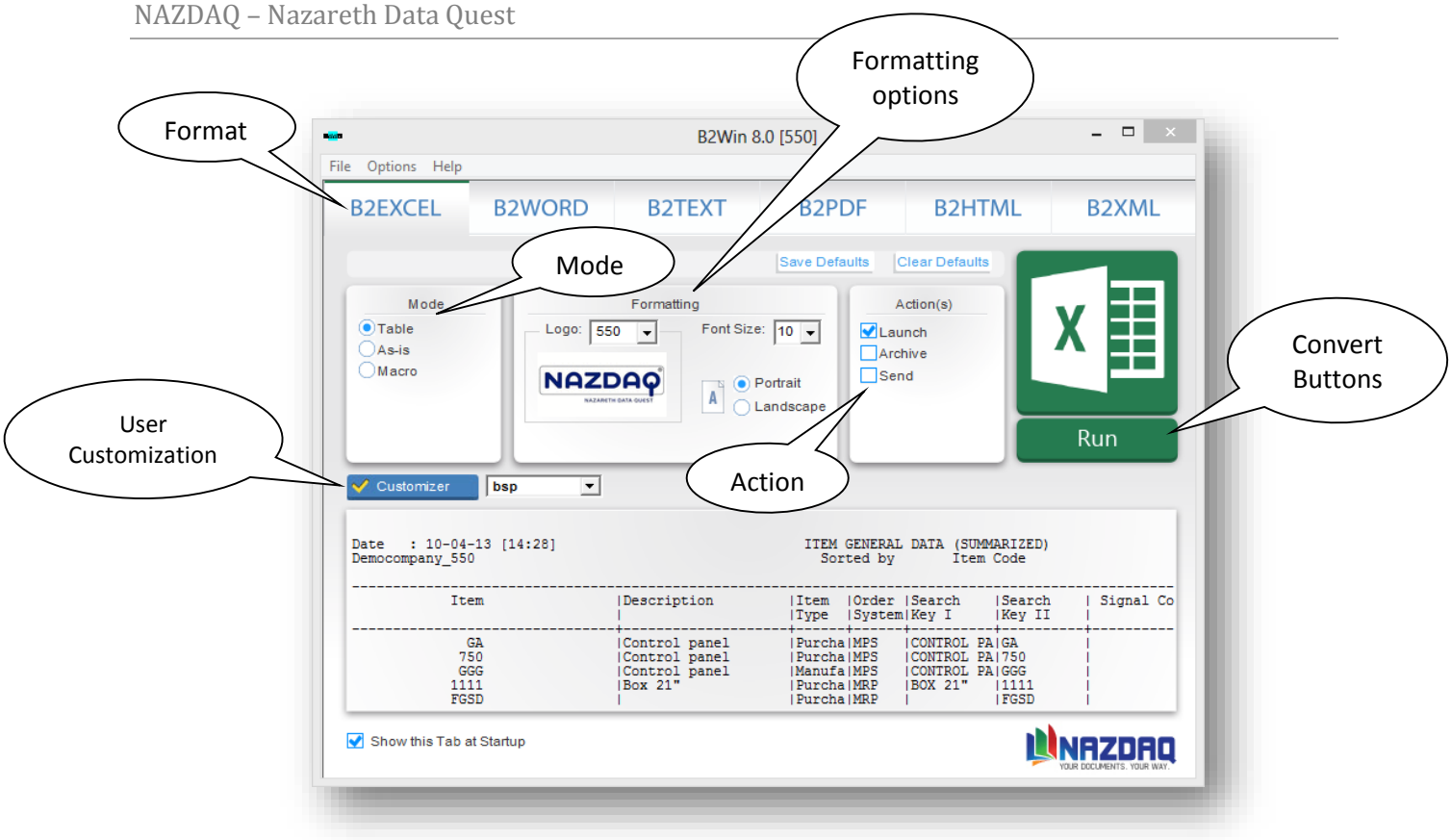


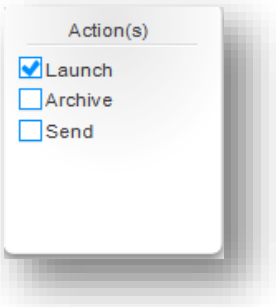
Figure 2 - *b2Win* main window

See the rest of the manual to learn how to use *b2Win*

2 Convert Buttons

b2Win can convert any report from Baan to six formats of files: ***Microsoft Excel, Microsoft Word, Text (Edit), PDF, HTML*** and ***XML***

To convert a report
Specify what format you want and press on run button, then choose the Action (See: ***Actions*** in Chapter 6 for more details)



Then click on one of the buttons in each of the six formats:

A file will be generated and will be sent to the action you specified, in our example we specify ***Launch***, then the file will be opened directly (with the name specified in: ***Output file name***)

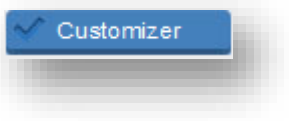
3 Report Customizer

3.1 Open Customizer

Every report can be customized for your own needs. The customization you make will be saved for the specified report, and other users can use this customization when printing the same report to *b2Win* device (depending on the Administrator, if he enabled customization per report and user or per report).

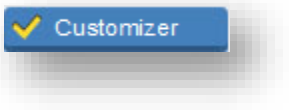
Customization per report and user
Every user will have own customization for this specific report.

Customization per report
Every report has one customization and all users will receive this customization when printing this report.
To run Report Customizer click on the button:



Another window will be opened, called Report Customizer.
For more details and how to use the Report Customizer see ***b2Win Report Customizer User Guide.***

Report Customized
If this report is customized the customization button will be displayed like:



Report without Customization
If the report doesn't have a customization the V icon (in yellow) will be disabled

3.2 Delete Customize

If a report is customized already and you wish to delete the old customization

Go to: ***File -> Delete Customization***

4 b2Diz – PDF Report Designer

Using this add-on can produce PDF files an easy and quick way using a friendly interface. The PDF with different font size, type and color, and can change and move text from the original layout. You must license the ***PDF Report Designer*** for this.
The PDF Report Designer add-on can be launched through the b2Win 8.0 user interface and b2Mail-Merge 8.0 broker.

Design per report and user
Every user will have his own design for this specific report.

Design per report
Every report has one design and all users will receive this design when printing this report.

To run PDF Designer click on the button:

Another window will be opened, called PDF Designer.

For more details and how to use b2Diz – The PDF Report Designer see ***b2Diz- The PDF Report Designer User Guide.***

Report Designed
If this report is designed the design button will be displayed like:

Report without Design
If the report doesn't have a design the V icon (in yellow) will be disabled

4.1 Open Design

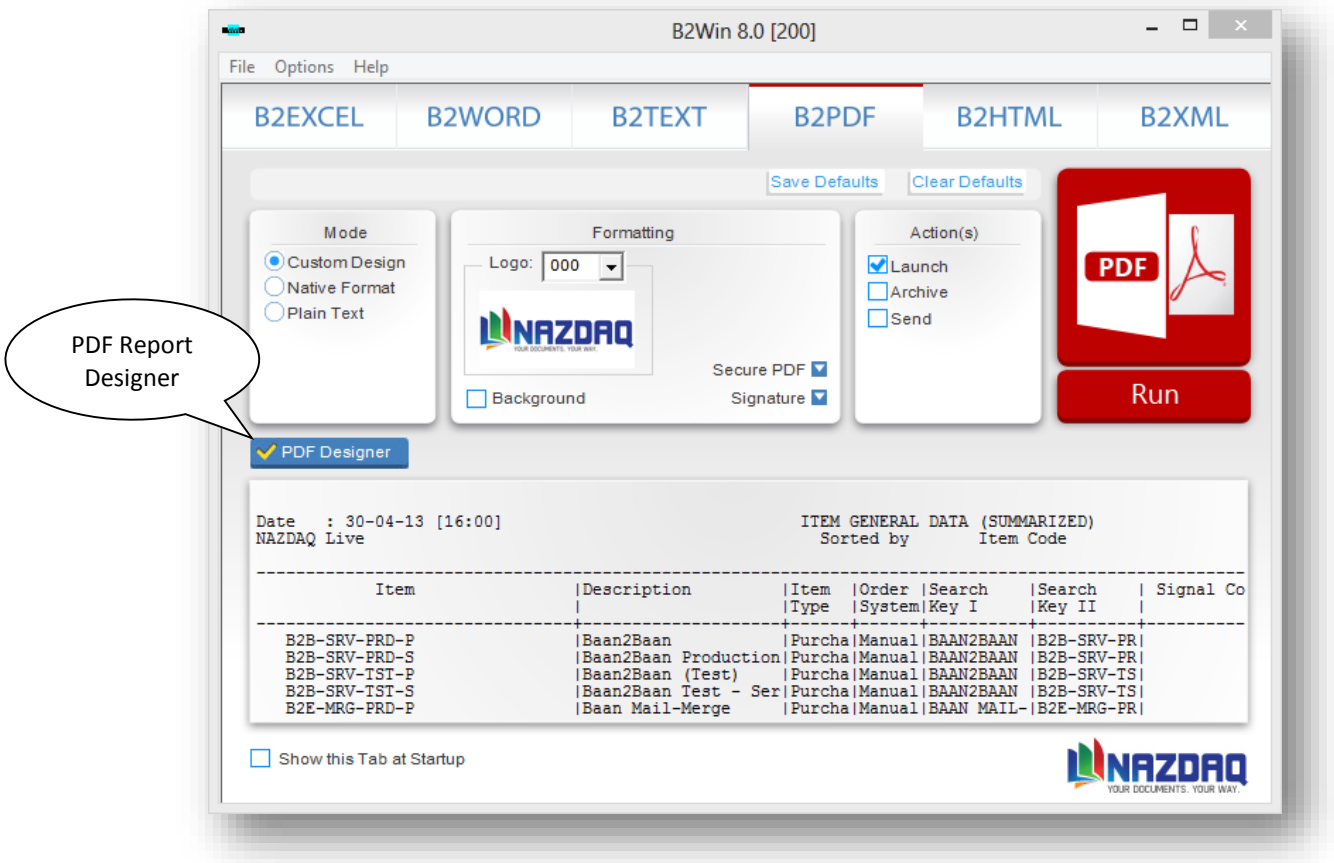


Figure 3 – *Launching b2Diz through b2Win interface*

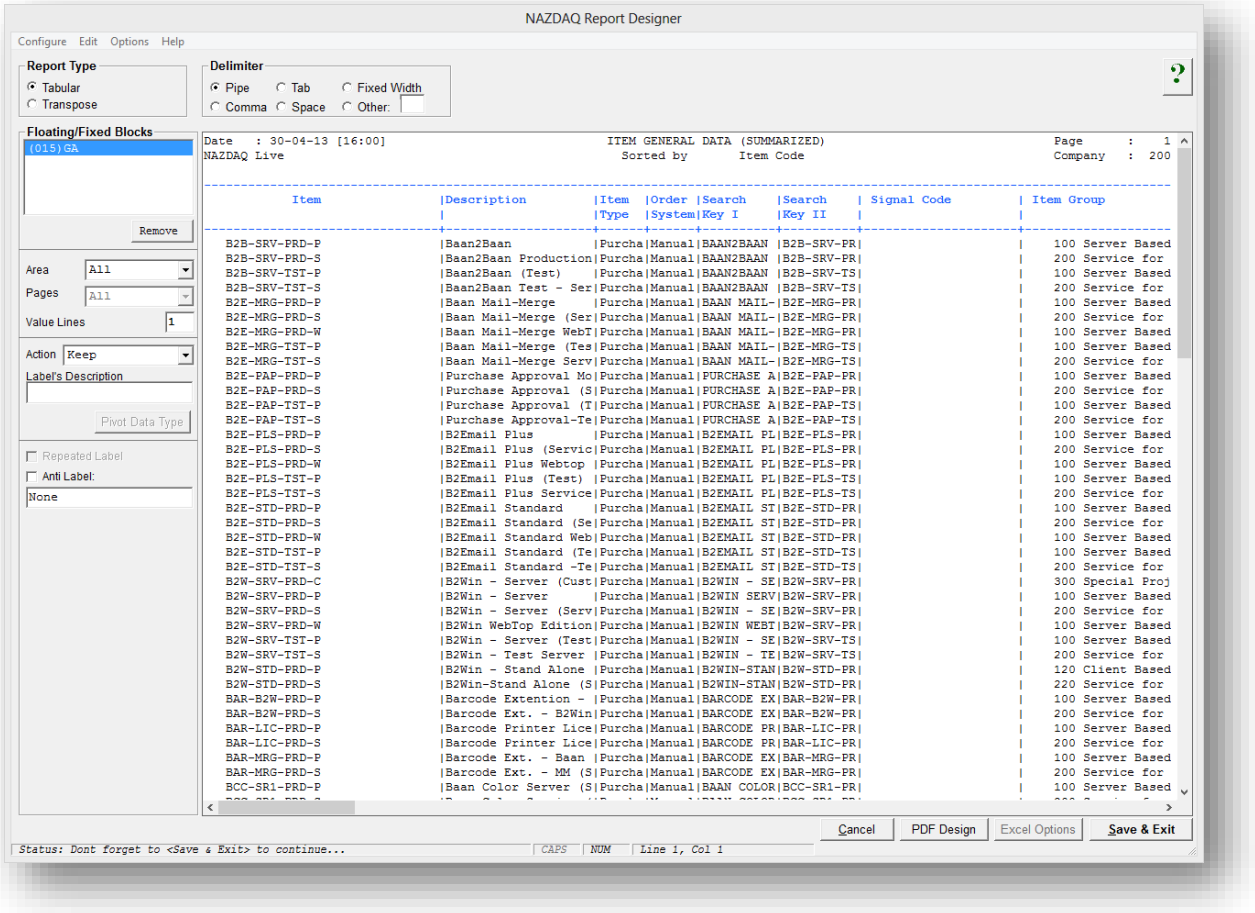


Figure 4 – PDF Report Designer step #1

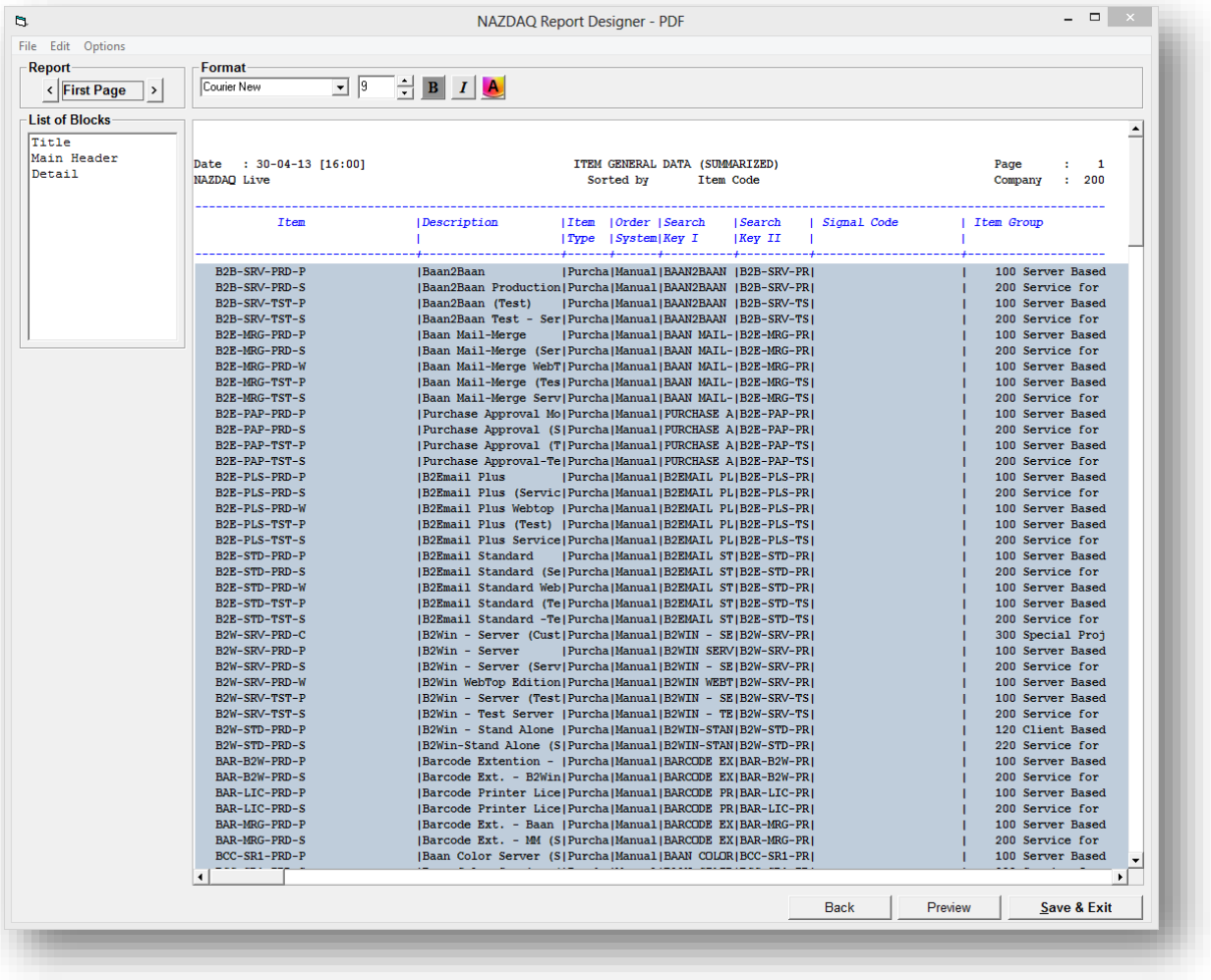


Figure 5 – PDF Report Designer interface

4.2 Delete Design

If a report is designed already and you wish to delete the old design

Go to: ***File -> Delete Design***

5 Mode

For each following output application/format you choose (***Microsoft Excel***, ***Microsoft Word***, ***PDF***, ***TEXT***, ***HTML*** or ***XML***), you can ask to transfer it (by pressing on Run button) for the modes applicable for that specific format, here are the modes:

5.1 Table

Remove all headers and organize the resulting data in a table format, either automatically or based on the customization designed earlier specifically for this report. This mode is applicable for 5 formats (***Microsoft Excel***, ***Microsoft Word***, ***TEXT***, ***HTML***, ***XML)***

When choosing Excel format table results looks like this:

Item	Description	Item Type	Order System	Search Key I	Search Key II	Signal Code	Item Group
B2B-SRV-PRD-P	Baan2Baan	Purcha	Manual	BAAN2BAAN	B2B-SRV-PR		100 Server Based
B2B-SRV-PRD-S	Baan2Baan Production	Purcha	Manual	BAAN2BAAN	B2B-SRV-PR		200 Service for
B2B-SRV-TST-P	Baan2Baan (Test)	Purcha	Manual	BAAN2BAAN	B2B-SRV-TS		100 Server Based
B2B-SRV-TST-S	Baan2Baan Test - Ser	Purcha	Manual	BAAN2BAAN	B2B-SRV-TS		200 Service for
B2E-MRG-PRD-P	Baan Mail-Merge	Purcha	Manual	BAAN MAIL-	B2E-MRG-PR		100 Server Based
B2E-MRG-PRD-S	Baan Mail-Merge (Ser	Purcha	Manual	BAAN MAIL-	B2E-MRG-PR		200 Service for

5.2 As-is

Report will be taken as-is into the chosen application with all headers and titles.
Fonts and configurations will not be taken into account. This mode is applicable for 2 formats (***Microsoft Excel, TEXT)***

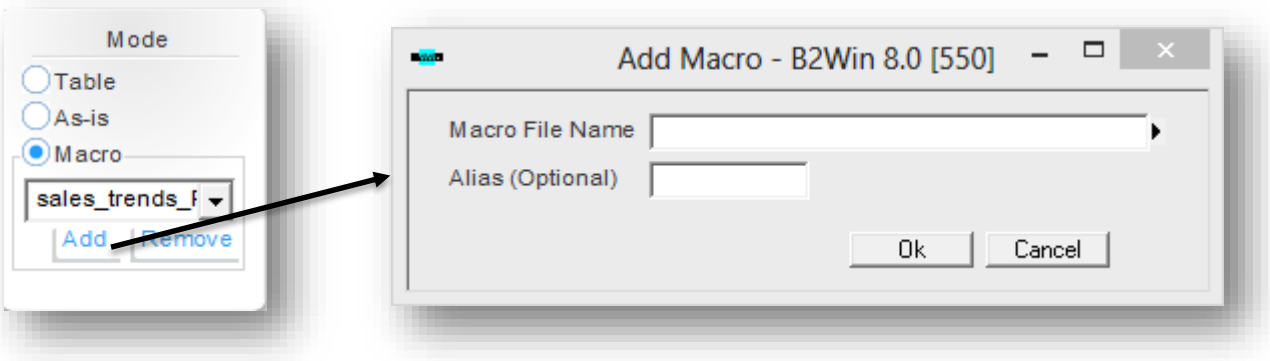
When choosing Text format table results looks like this:

```
Date   : 13-05-13 [16:26]                          ITEM GENERAL DATA (SUMMARIZED)                          Page      :    1
NAZDAQ Live                                          Sorted by       Item Code                             Company   :  200

-------------------------------------------------------------------------------------------------------------------------
           Item                |Description         |Item  |Order |Search    |Search    | Signal Code         | Item Group
                               |                    |Type  |System|Key I     |Key II    |                     |
-------------------------------+--------------------+------+------+----------+----------+---------------------+--------------------
   B2B-SRV-PRD-P               |Baan2Baan           |Purcha|Manual|BAAN2BAAN |B2B-SRV-PR|                     |    100 Server Based
   B2B-SRV-PRD-S               |Baan2Baan Production|Purcha|Manual|BAAN2BAAN |B2B-SRV-PR|                     |    200 Service for
   B2B-SRV-TST-P               |Baan2Baan (Test)    |Purcha|Manual|BAAN2BAAN |B2B-SRV-TS|                     |    100 Server Based
   B2B-SRV-TST-S               |Baan2Baan Test - Ser|Purcha|Manual|BAAN2BAAN |B2B-SRV-TS|                     |    200 Service for
   B2E-MRG-PRD-P               |Baan Mail-Merge     |Purcha|Manual|BAAN MAIL-|B2E-MRG-PR|                     |    100 Server Based
   B2E-MRG-PRD-S               |Baan Mail-Merge (Ser|Purcha|Manual|BAAN MAIL-|B2E-MRG-PR|                     |    200 Service for
```

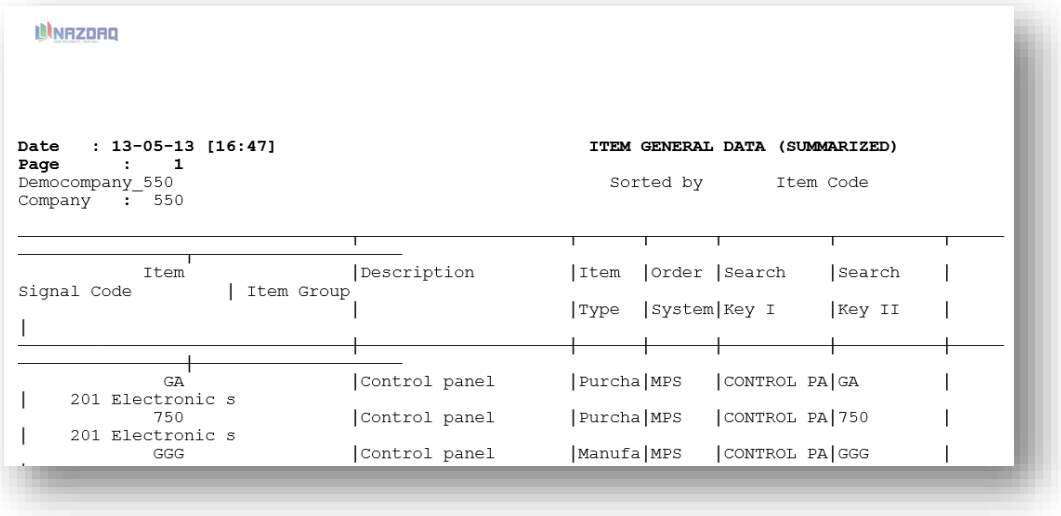
5.3 Macro

The report output will be exported to the chosen application while a pre-defined macro will run on the resulting data (applicable for ***Microsoft Excel*** and ***Microsoft Word*** only). Macro formats supported such as: MS Excel (XLS – supports older office version for macro, XLSM – macro – enabled workbook, XLTM – macro – enabled template, XLAM – Macro Enabled add-in).
MS Word (DOC, DOT – Older office version macro support, DOCM – Macro-Enabled Document, DOTM– Macro-Enabled Template). You can add the macros files by pressing on the button bellow:



5.4 Native Format

The report will be exported to the chosen application with all font definitions from ***Baan/ERP Ln*** (applicable for ***Microsoft Word*** and ***PDF*** only).
When choosing Word format table results looks like this:



NAZDAQ

Date : 13-05-13 [16:47] **ITEM GENERAL DATA (SUMMARIZED)**
Page : 1
Democompany_550 Sorted by Item Code
Company : 550

Item	Description	Item Type	Order System	Search Key I	Search Key II	Signal Code	Item Group
GA	Control panel	Purcha	MPS	CONTROL PA	GA		
201 Electronic s 750	Control panel	Purcha	MPS	CONTROL PA	750		
201 Electronic s GGG	Control panel	Manufa	MPS	CONTROL PA	GGG		

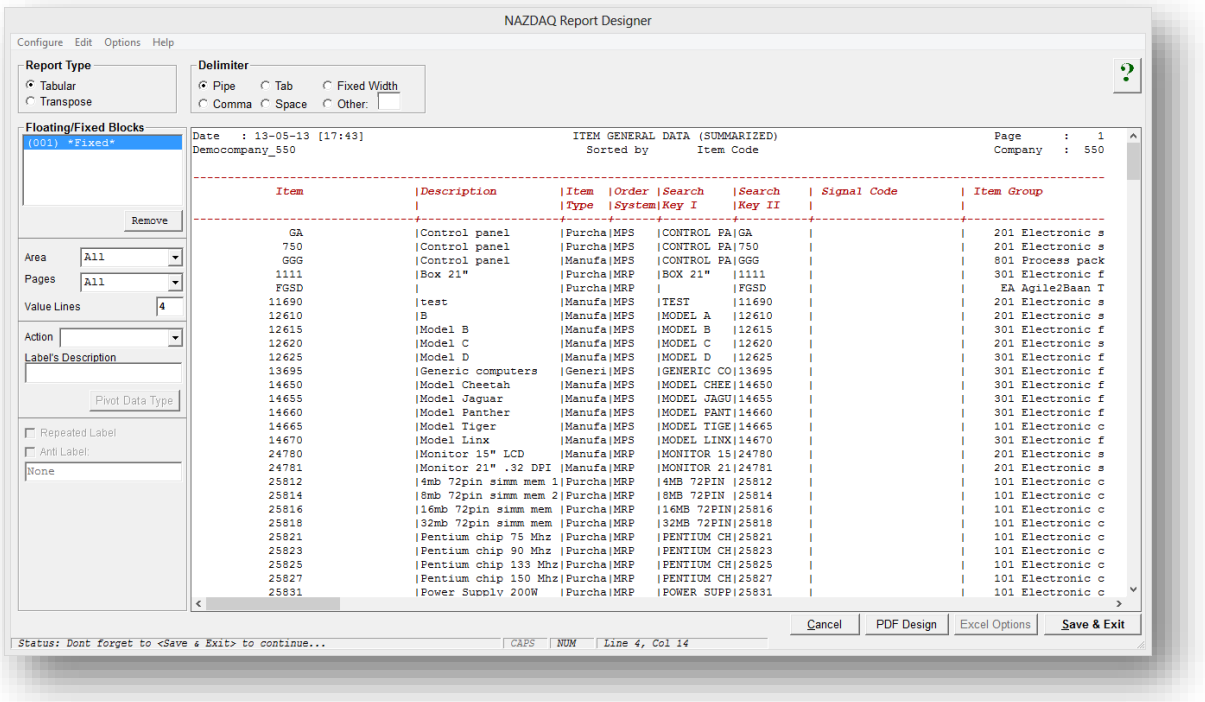
5.5 Plain Text

Report will be taken in text format into the chosen application with all headers and titles. Fonts and configurations will not be taken into account. (Applicable for ***Microsoft Word*** and ***PDF*** only).

5.6 Custom Design

Report will be loaded into b2Diz - The PDF designer using a friendly interface to produce PDF files with different font size, type and color, and can change and move text from the original layout.

Report Designer Interface launched, once choosing PDF Designer:

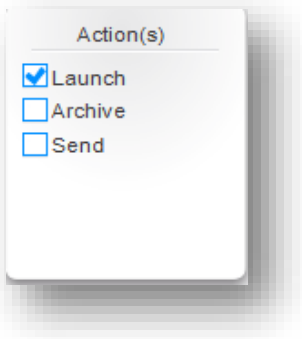


5.7 Standard

Report will be converted to the standard format into the chosen application with all headers and titles (Applicable for ***HTML*** and ***XML*** only).

6 Actions

You can specify what action to take when you convert a report using the run buttons
There are three actions; you can specify the three actions to be affected at once:



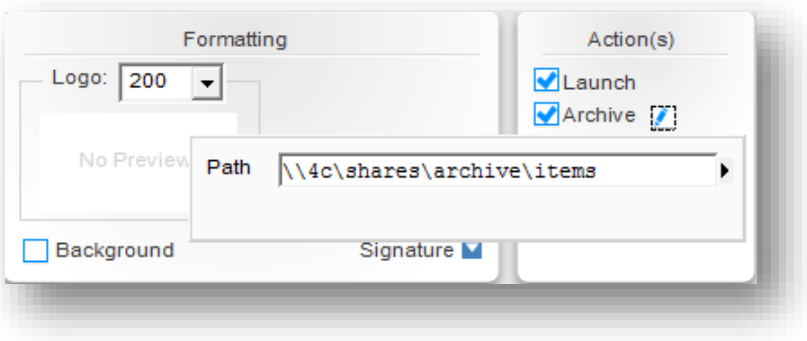
Note: You should specify at least one action when converting; otherwise you can't convert a report.

6.1 Launch

Launches the report with the application chosen format.

6.2 Archive

Archives the chosen format per report. With the option to specify the archive directory path.



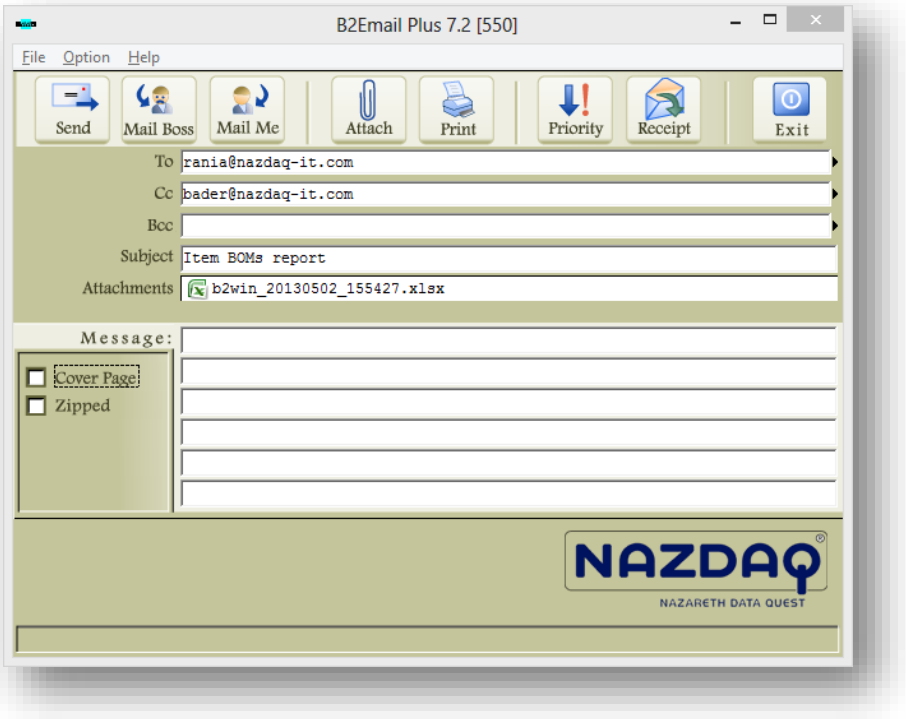
6.3 Send

Opens *b2Email Plus* with the report attached to the email message and ready to be sent.

7 Send to b2Email Plus

You can send the output report by email:
Using ***b2Email Plus***

a. Choose the Action ***Send***
b. Click on any Convert button according to the type you want
c. ***b2Email Plus*** window will be opened

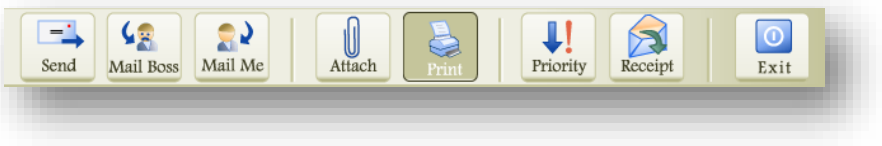


You can send E-mails directly from *b2Win* with the report attached with the format you have chosen.

With b2EmailPlus you can: send the email to your Boss, yourself, any other e-mail, fax, set the e-mail priority, request receipt, zip, add other attachment to the e-mail, write a subject and a message and then save defaults. Next time you use ***b2Email Plus***; all your settings will be used as default.

The default will also be used in auto mode.

Printing from b2Email
When *b2Win* sends the report to ***B2Emai Plus***, it can be also printed to the ***b2Email Plus*** default printer using the ***Print*** button:



Or you can click on ***File -> Print*** to get the list of printers:

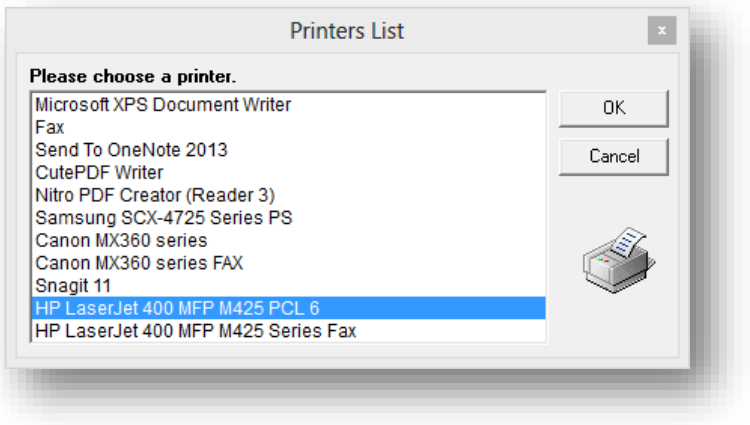


Figure 6 - List of Printers available with b2Email Plus

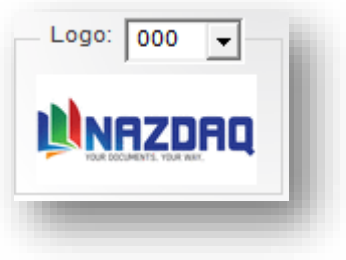
8 Formatting

8.1 Logo

You can attach a header and footer for every Baan/ERP Ln company (you can also define virtual companies for the sake of attaching a header and footer to them). By changing the company number in the *b2Win* ***device***, you can choose a header/footer from a different company to go with your report. The default is the current company.

To specify the company with this report:

1) Open ***Logo drop down box*** and choose the name or number of the company you want



2) When specifying a company, a logo thumbnail will be displayed automatically under the company name

The output report will also have the graphical settings (***Header***/***Footer***) of this company (only if specify the right ***Mode*** of this report) (for more information about the modes see ***Modes*** page)

If you wish to include the company logo and footer in the resulting document, as defined for the company, you need to choose the right company from the list.

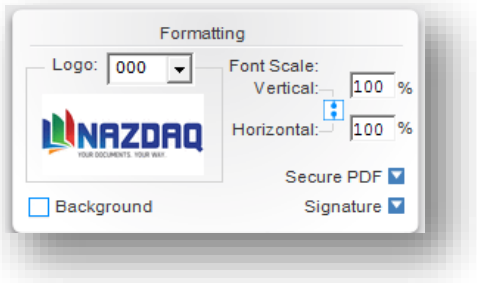
8.2 Font

This value decides the font size in the resulting document. In Graphic PDF format, it scales the document. (Applicable for ***MS Word, MS Excel*** and ***HTML*** only)

8.2.1 Font Scale

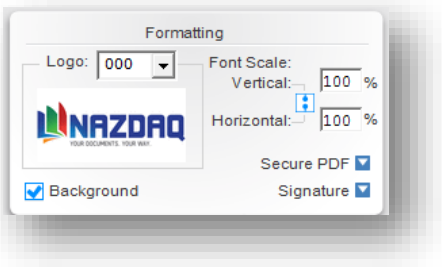
Font Scale is applicable for PDF format only:

1) ***Vertical font scale*** – Scale the font vertically
2) ***Horizontal font scale*** – Scale the font horizontally



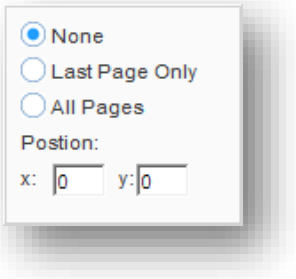
8.3 Background

You can choose whether the report include background by checking the box in the following windows (Applicable for ***MS Word, PDF*** and ***HTML*** only)



8.4 Signature

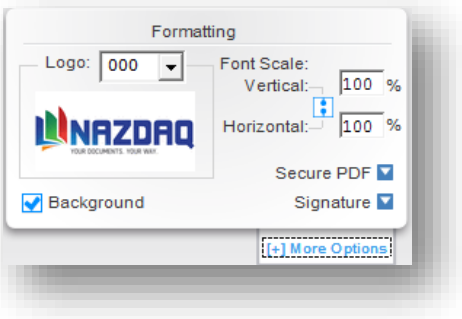
You can choose whether the report include background by checking the box in the following windows (Applicable for ***MS Word, PDF*** and ***HTML*** only)



You can choose whether the signature will appear in All Pages or Last Page Only, also set the position of it in the page.

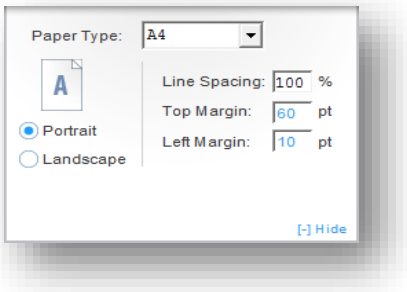
8.5 PDF Settings

General Options window have a basic settings for the report like: ***Paper Type, Orientation, Background*** and ***Margins.***



To open this window

1) Click on the menu: ***Formatting -> More Options***



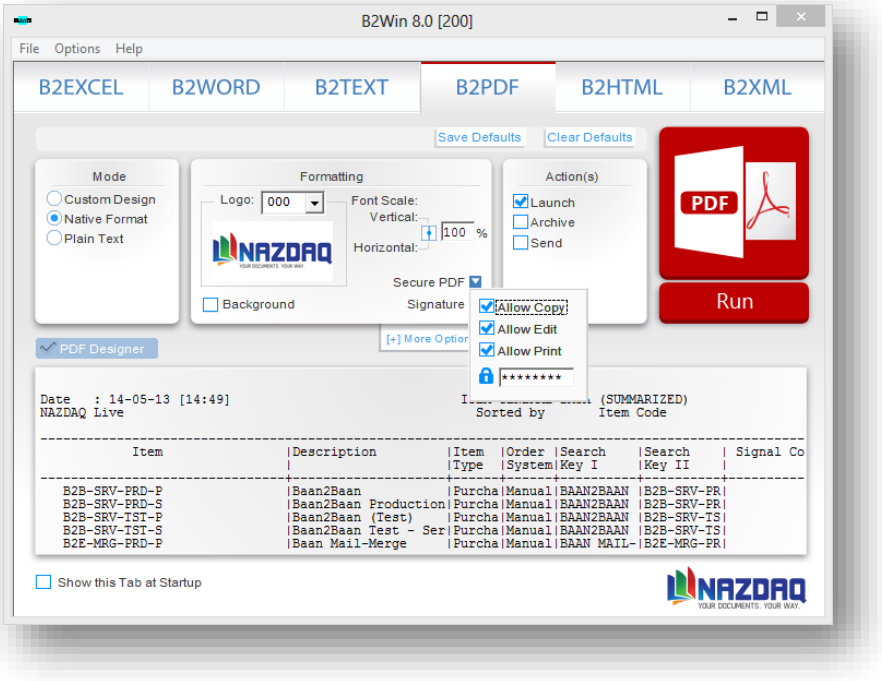
2) You can select the settings you want and click on Save (these options can be saved as default per user or per report, See ***Defaults*** in manual)

Note: If the value for ***Top***/***Left*** margin is in blue color that means the value will be taken from ***b2win.ini*** file (the default in server).

8.5.1 Secure PDF

Additional settings are available for PDF such as Signature & Security issues, which only affect PDF conversion.
To secure the PDF file:

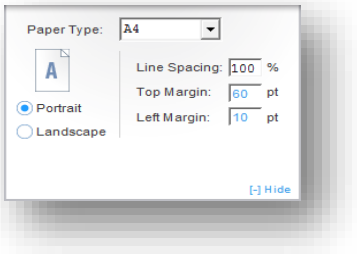
1) Under PDF format tab: ***Formatting -> Secure PDF***



2) You can select the settings you want, and they will automatically be saved if you choose save defaults after that

8.5.2 Line Spacing

Line Spacing – Value 100% indicates number 1 of empty lines between each two data lines

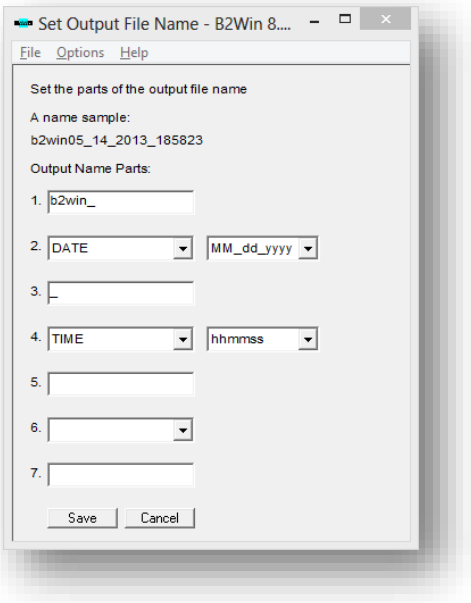


8.6 Options

8.6.1 Set File name

You can select the output filename structure for this report.

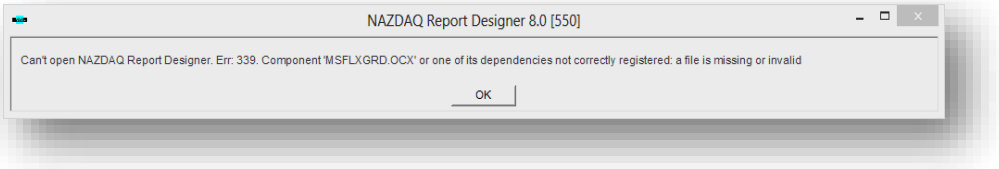
To do this:
Click on menu: ***Options -> Set File Name***, a window will be opened



You can specify in this window the parts of the report name

8.6.2 Update Components

For some windows versions, Customizer may not work with an error similar to this:



To fix this you need to menu: ***Help -> Update Components***

8.6.3 Option Help

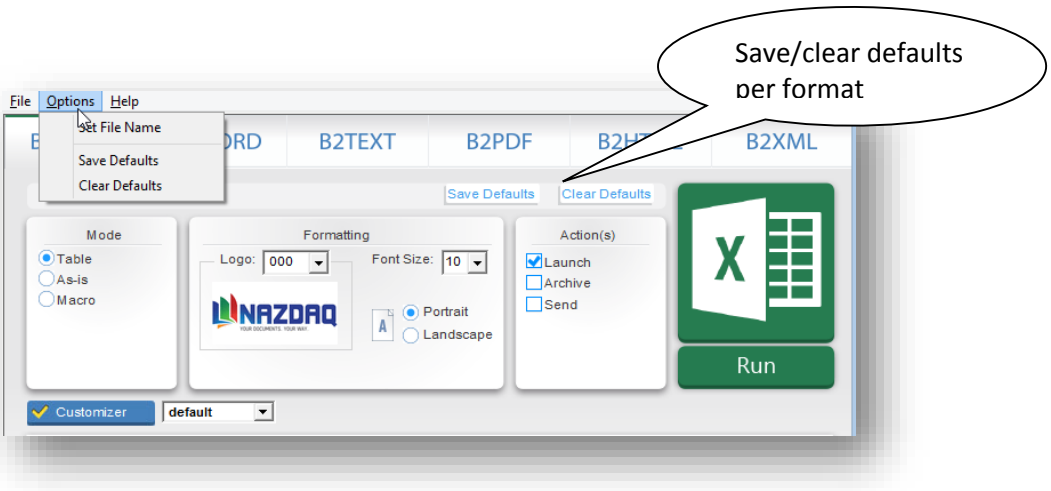
You can run this help from menu: ***Help - > Options Help***
The Mouse cursor will be changed to "?" and then you can click on any object on screen and get a short description about it.

8.7 Defaults

In *b2Win* all the settings in ***Formatting***, ***General Settings***, ***File Name Settings*** and options from the main window of *b2Win* like: ***Mode***, ***Logo***, ***Font size, Actions***, and ***Report Customization*** can be saved inside the ***Baan server***, and each user will get his own saved defaults for this report each time they run *b2Win* on this specific report.

8.7.1 Save defaults

To perform the saving of Defaults go to menu: ***Options -> Save Defaults.***



8.7.2 Clear defaults

To clear the defaults and start over again with new configurations for this report go to menu: ***Options -> Clear Defaults.***

Note: All old configurations will be deleted and cannot be recovered again!

9 General Information

Trade Marks

b2Win a trade Mark of NAZDAQ Ltd.
All other referenced company and product names may be trademarks or registered trademarks of others.

NAZDAQ

For support, please send examples/ print screens to
info@nazdaq-it.com

Our office Hours are Monday - Thursday 10:00 – 19:00 and Friday 10:00 – 17:00 GMT +2

Check our WEB site for other Baan and Infor ERP Ln Related Products
www.nazdaq-it.com

Revision: May 15, 2013