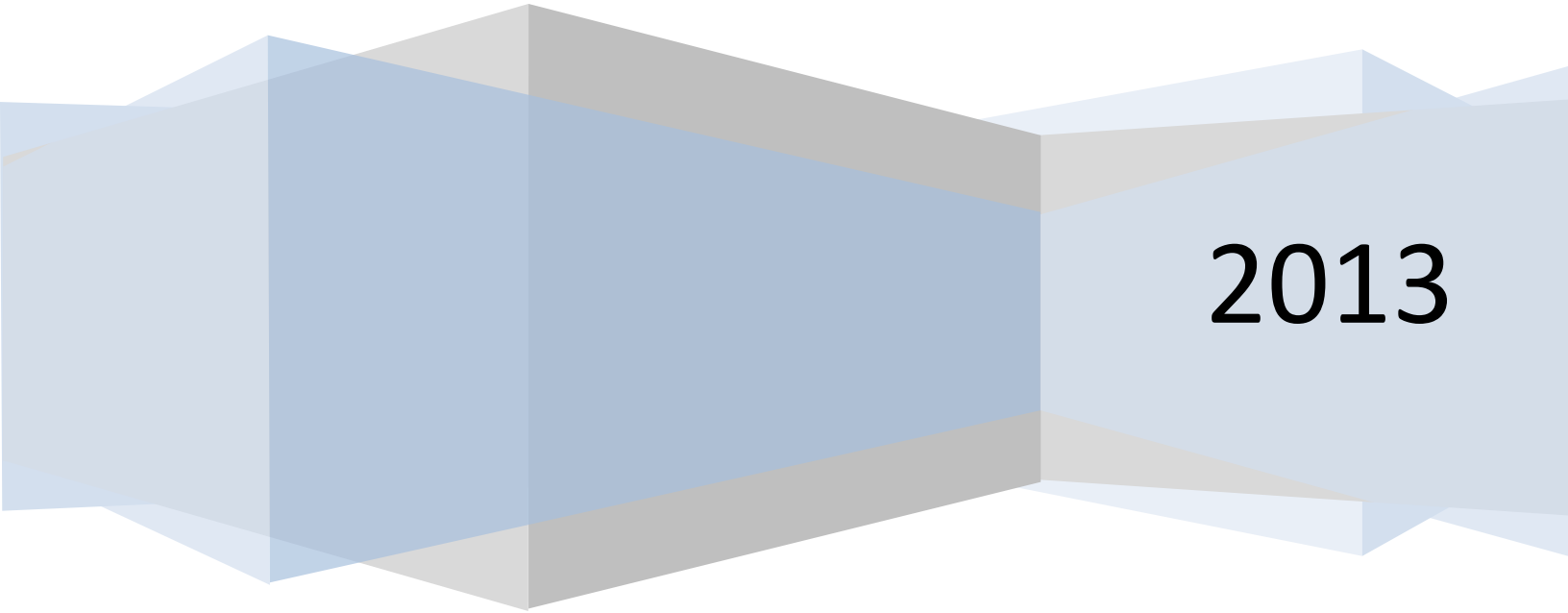
b2Win 8.0

Implementation Guide – BaanERP

NAZDAQ – Nazareth Data Quest Ltd.



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Contents

1 Getting Started with b2Win 4

1.2 The b2Win device 5

1.2.1 Example of Excel Report conversion: 9

1.2.2 Example of converting report to Custom PDF format 10

1.3 Introducing Auto Mode 12

2 Report Customizer (RC) 13

2.1 Before using Report Customizer 13

2.2 Using Report Customizer 14

2.3 b2Win Customization per user 14

2.4 Authorization to Customize reports 15

2.5 Copy Customization to another user 16

2.6 Global Definitions 17

2.6.1 Dot_Comma 17

2.6.2 Data Dictionary 17

3 Graphics within b2Win 19

3.1 Introduction 19

3.1.1 B2PDF – Custom Design Mode, with logo and background image 19

3.1.2 B2Word – Table Mode, with logo 20

3.1.3 B2HTML – Table Mode, with logo 20

3.2 Defining a Header and Footer 21

3.2.1 JPEG Header and Footer 22

3.2.2 PDF Header and Footer 22

3.2.3 Selecting Logo from b2Win 23

3.3 Defining a background Image 24

3.4 Fine-Tuning your document 25

3.4.1 Paper Types 25

3.4.2 Margins (Applicable for PDF and Microsoft Word only) 25

3.4.3 Font Size 26

3.4.4 Font Scale 26
3.5 PDF Settings 27
4 Macro mode within b2Win 29
4.1 Introduction 29
4.2 How to write your own macros 29
5 File management with b2Win 33
5.1 Introduction 33
5.2 Defining a local temporary directory on the client 33
5.3 Managing the temporary directory on the server 34
5.4 How often to copy files from the server to the client 34
5.5 Name of resulting file 34
5.6 Archiving Directory 35
5.7 Copy files to Client upon conversion 37
5.8 b2Win.ini – List of all Parameters 37
6 E-mail, Print and Fax from b2Win 40
6.1 E-mail & Fax Integration 40
6.2 Print from b2Win 41
7 Auto Mode & Passing arguments 42
7.1 Introduction 42
7.2 b2Win available arguments 43
7.2.1 Type: *(-t/-type)* 43
7.2.2 Actions: *(-launch/-archive/-send)* 44
7.2.3 Pre-defined options: *(-f/-file)* 44
7.2.4 User Pre-defined options: *(-u/-user)* 46
7.2.5 Use b2Win in manual mode *(-m/-manual)* 47
7.2.6 b2Email Plus Actions: *(-e/-b2email)* 47
8 General Information 49
8.1 Legal Notice and addresses 49

1 Getting Started with b2Win

1.1 How to use this guide

Whether you have purchased, or are in the process of evaluating *b2Win*, this guide will take you through the product from different points of view and help you implement it through your organization. You will also find help on how to optimize it.

The ***first chapter*** goes 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.

Chapter 2 **-** Describes how *b2Win* converts reports to table format, most commonly used is to convert reports to ***Microsoft Excel***. Most standard looking reports can be converted without any additional work using the *b2Win* smart converter, while others require customizing using the ***Report Customizer***. The chapter describes the different steps required to enable ***Report Customizer*** and how to best use it with different report styles.

Chapter 3 **-** Goes through the options of adding graphics to documents produced using *b2Win*; adding a logo and footer, background images and how to fine tune the output to "look nice".
Also it introduces **b2Diz – The PDF Report Designer**, using this add-on you can produce PDF files with different font sizes, types and colors, 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.
A section is dedicated for tuning your document.

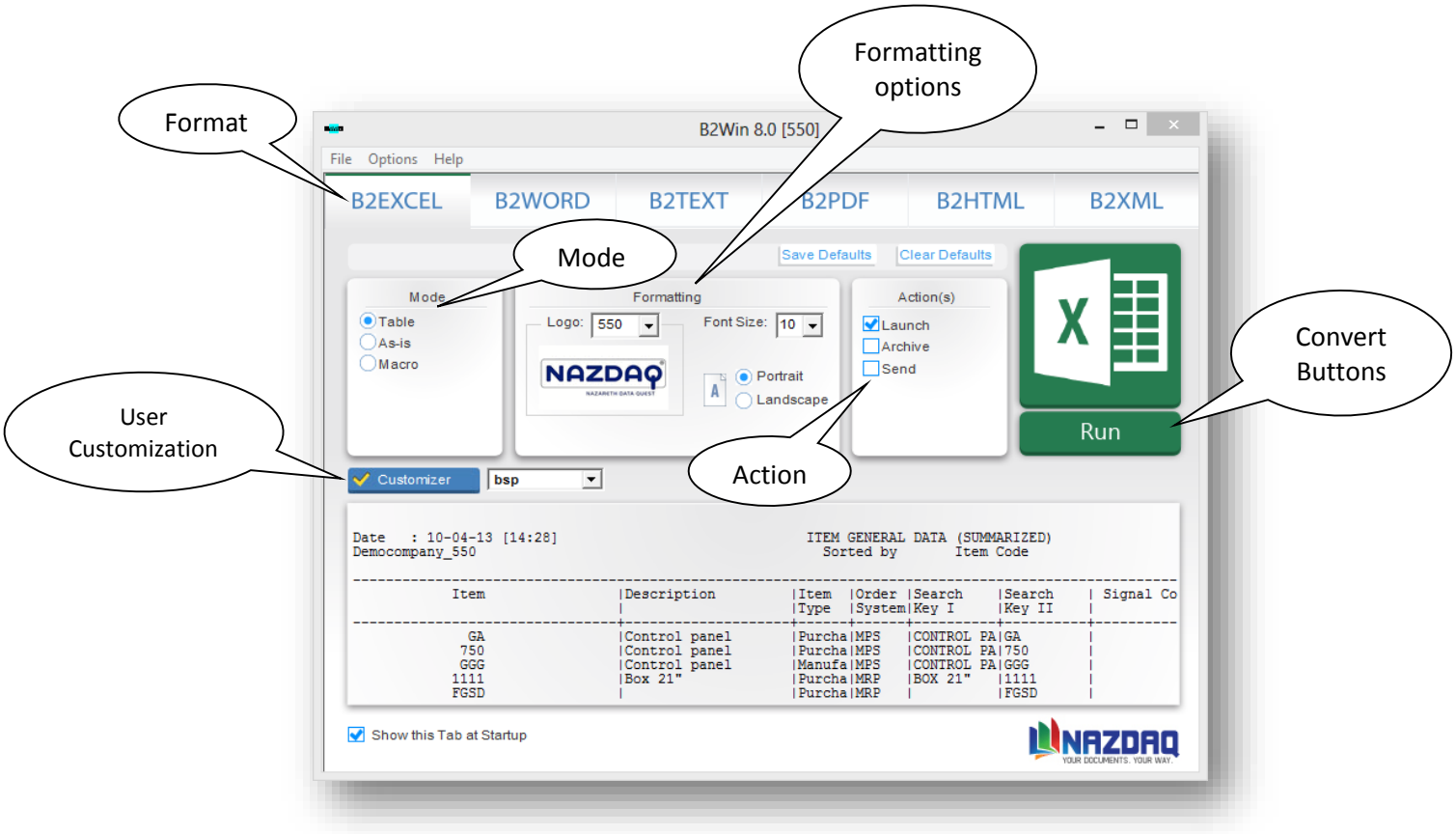
Chapter 4 **-** Introduces us to the way to use home-made macros as part of *b2Win*.
Chapter 5 **-** Goes through the management of files within *b2Win*.
Chapter 6 **-** Shows the integration process between *b2Win* and *b2Email Plus* and how you can use it to e-mail, fax or print from *b2Win*.
Chapter 7 **-** Introduces the Auto Mode and arguments in *b2Win* that help converting reports directly into other application/format, without going through an intermediate interface, and also load *b2Win* with specific configurations from any user defaults you choose or from external configuration file.

Most of the tuning of the *b2Win* application can be done through changing values of variables in the ***b2win.ini*** file which is located in ***$BSE/nazdaq8/settings/adm***. When this guide refers to a variable like ***Customize_Per_User*** – this is usually a ***b2win.ini*** variable.

A *b2Win User Guide* is also available for users who would like to know more about using the product.

1.2 The b2Win device

Print a report from Baan and choose device *b2Win*:



The following are the different options in the *b2Win* interface:

Mode

For every output format you choose (***Microsoft Excel***, ***Microsoft Word***, ***PDF***, ***TEXT***, ***HTML*** or ***XML***), you can ask to transfer it in some of the following modes:

- ***Table –*** Remove all duplicate titles and headers and also organize the resulting data in a table format, either automatically or based on the customization designed earlier specifically for this report.

- ***As-Is –*** Report will be taken as-is into the chosen format with all headers and titles. Fonts and report customization will not be taken into account (Applicable for ***Microsoft Excel*** and ***Text*** only)

- ***Native format –*** The report will be exported to the chosen format with all font definitions from Baan (Applicable for ***Microsoft Word*** and ***PDF*** only).

- ***Macro*** – The report output will be exported to the chosen format while a pre-defined macro will run on resulting data. 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) (Applicable for ***Microsoft Excel*** and ***Microsoft Word*** only).

- ***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).

- ***Custom Design –*** Report will be converted to PDF using the design that was generated through b2Diz - The PDF designer using a friendly interface to produce PDF files with different font sizes, types and colors, and can change and move text from the original layout (Applicable for ***PDF*** only).

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

Font Size

This value decides the font size in the resulting document. In Graphic PDF format, it scales the document.

Logo

You can define a header and footer for every Baan company. 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 none.

You can also define virtual companies for the sake of attaching a header and footer.

Logo Thumbnail

You can see the logo specified for the company you are choosing.

Action

With this option you can decide what to do with the resulting file. There are three different actions that can be performed on the file (you have to choose at least one option)

- ***Launch***
  Launches the file in the default application

- ***Archive***
  Archives the file with option to define directory path per user and report (review ***Chapter 5 – File Management in b2Win***)

- ***Send***
  Allows the file to be opened in ***b2Email Plus*** with the report attached to the e-mail message and ready to be sent (review ***Chapter 6 – E-mail Integration***)

Set File Name (Under Options)
You can change the default output file name and save it per report per user. (Please review ***Chapter 5 - File management in b2Win).***

Formatting (Under main menu)
Contains formatting options for *b2Win* reports and conversions. (Please ***review chapter 3 – Graphics in b2Win)***

PDF Settings
Additional settings are available for PDF such as signature and security issues. (Please ***review chapter 3 – Graphics in b2Win)***

Save/Clear Default (Under main menu)
You can save the default options chosen in the *b2Win* device for a specific report, in order not to have to re-select these options every time the report is run using *b2Win.*

Update Components (Under Help)

The ***Customizer/PDF Designer*** options require some Windows based components. This option installs or updates the required components for activating the ***Customizer/PDF Designer*** option.

Options Help (Under Help)
By choosing this, a question mark will appear. By moving the curser to a certain field in the device and clicking on it, a case sensitive help screen will appear with explanations about the specific feature. The help file is stored under ***$BSE/nazdaq8/help/b2whelp2.inf*** (For language 2, which is the default for other languages too). For other languages, you need to define a separate b2whelp<language number>.inf file.

Customizer
Most reports are converted to table mode (Excel for example) with no additional effort. *b2Win* smart converter automatically detects headers, titles and detail lines, and converts the report into a meaningful table. If the report is not standard and the automatic conversion is not satisfactory, you can use the customize option for creating a design for better conversion into tabular format. With

this option, you define headers, sub-headers, data-types and perform additional splitting, deleting of columns and more manipulation. The resulting configuration will be saved for future use with this report and streamlining the conversion from Baan into table format. (Please review ***Report Customizer*** manual for more details***)***

User Customization (Not shown in the screenshot)
The default setting is to allow one customization per report, and this configuration will be used by all users running this report; all users with access to customize reports can change it. If you decide to implement user-level configurations (by assigning the variable ***Customize_Per_User*** to yes), then with this option you can choose to run the default customization or the customization made by another user.

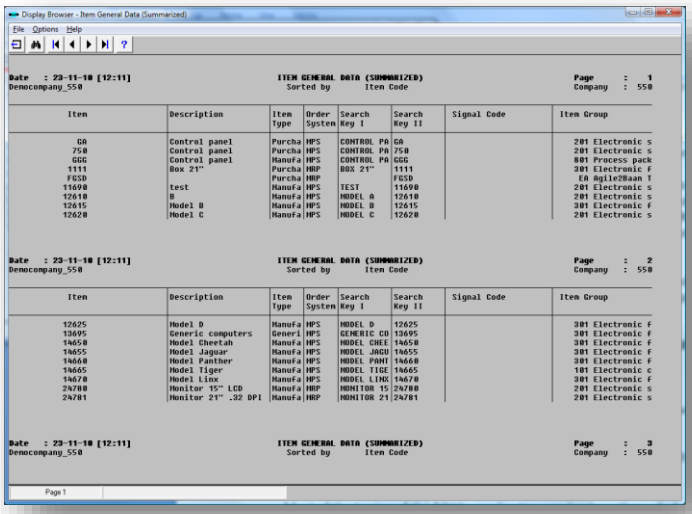
PDF Designer (B2Diz – The PDF Designer)
Using this add-on can produce PDF files with different font size, type and color, and can change and move text from the original layout. This is performed using a friendly interface that makes report design an easy and quick task. You must license the ***PDF Report Designer*** for this.

Report Design

The default setting is to allow one design per report, and this design will be used by all users running this report; all users with access to design reports can change it.

1.2.1 Example of Excel Report conversion:

We have this report as a ***Baan Standard Report***; we need to convert it to ***Microsoft Excel*** sheet (Review ***Report Customizer*** manual, for reports types and parts):



Date : 23-11-10 [12:11] ITEM GENERAL DATA (SUMMARIZED) Page : 1
Democompany_550 Sorted by Item Code Company : 550

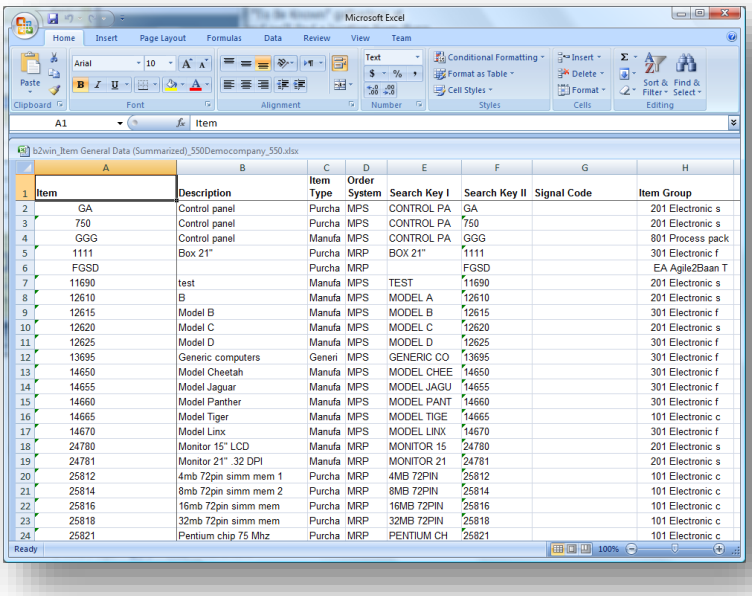
Item	Description	Item Type	Order System	Search Key I	Search Key II	Signal Code	Item Group
GA	Control panel	Purcha	MPS	CONTROL PA	GA		201 Electronic s
750	Control panel	Purcha	MPS	CONTROL PA	750		201 Electronic s
GGG	Control panel	Manufa	MPS	CONTROL PA	GGG		801 Process pack
1111	Box 21"	Purcha	MRP	BOX 21"	1111		301 Electronic f
FGSD		Purcha	MRP		FGSD		EA Agile2Baan T
11690	test	Manufa	MPS	TEST	11690		201 Electronic s
12610	B	Manufa	MPS	MODEL A	12610		201 Electronic s
12615	Model B	Manufa	MPS	MODEL B	12615		301 Electronic f
12620	Model C	Manufa	MPS	MODEL C	12620		201 Electronic s

Date : 23-11-10 [12:11] ITEM GENERAL DATA (SUMMARIZED) Page : 2
Democompany_550 Sorted by Item Code Company : 550

Item	Description	Item Type	Order System	Search Key I	Search Key II	Signal Code	Item Group
12625	Model D	Manufa	MPS	MODEL D	12625		301 Electronic f
13695	Generic computers	Generi	MPS	GENERIC CO	13695		301 Electronic f
14650	Model Cheetah	Manufa	MPS	MODEL CHEE	14650		301 Electronic f
14655	Model Jaguar	Manufa	MPS	MODEL JAGU	14655		301 Electronic f
14660	Model Panther	Manufa	MPS	MODEL PANT	14660		301 Electronic f
14665	Model Tiger	Manufa	MPS	MODEL TIGE	14665		101 Electronic c
14670	Model Linx	Manufa	MPS	MODEL LINX	14670		301 Electronic f
24780	Monitor 15" LCD	Manufa	MRP	MONITOR 15	24780		201 Electronic s
24781	Monitor 21" .32 DPI	Manufa	MRP	MONITOR 21	24781		201 Electronic s

Date : 23-11-10 [12:11] ITEM GENERAL DATA (SUMMARIZED) Page : 3
Democompany_550 Sorted by Item Code Company : 550

1) Print report to the *b2Win* device
2) Click on ***B2Excel*** button, and an Excel file will be generated



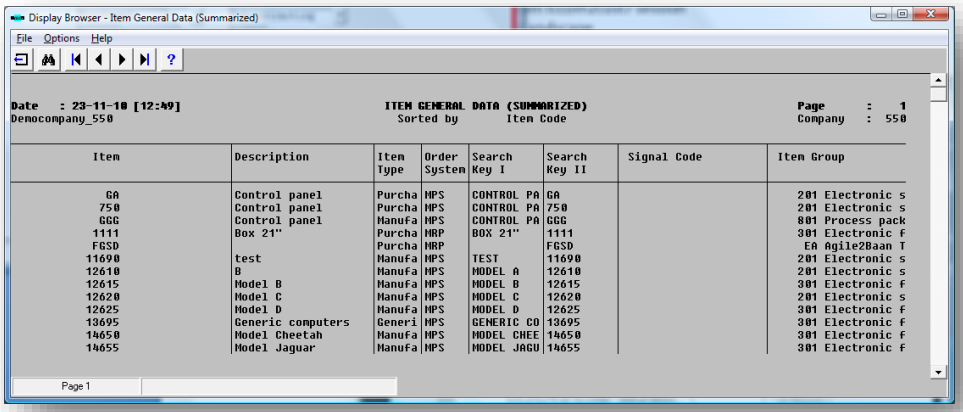
b2win_Item General Data (Summarized)_550Democompany_550.xlsx

	A	B	C	D	E	F	G	H
1	Item	Description	Item Type	Order System	Search Key I	Search Key II	Signal Code	Item Group
2	GA	Control panel	Purcha	MPS	CONTROL PA	GA		201 Electronic s
3	750	Control panel	Purcha	MPS	CONTROL PA	750		201 Electronic s
4	GGG	Control panel	Manufa	MPS	CONTROL PA	GGG		801 Process pack
5	1111	Box 21"	Purcha	MRP	BOX 21"	1111		301 Electronic f
6	FGSD		Purcha	MRP		FGSD		EA Agile2Baan T
7	11690	test	Manufa	MPS	TEST	11690		201 Electronic s
8	12610	B	Manufa	MPS	MODEL A	12610		201 Electronic s
9	12615	Model B	Manufa	MPS	MODEL B	12615		301 Electronic f
10	12620	Model C	Manufa	MPS	MODEL C	12620		201 Electronic s
11	12625	Model D	Manufa	MPS	MODEL D	12625		301 Electronic f
12	13695	Generic computers	Generi	MPS	GENERIC CO	13695		301 Electronic f
13	14650	Model Cheetah	Manufa	MPS	MODEL CHEE	14650		301 Electronic f
14	14655	Model Jaguar	Manufa	MPS	MODEL JAGU	14655		301 Electronic f
15	14660	Model Panther	Manufa	MPS	MODEL PANT	14660		301 Electronic f
16	14665	Model Tiger	Manufa	MPS	MODEL TIGE	14665		101 Electronic c
17	14670	Model Linx	Manufa	MPS	MODEL LINX	14670		301 Electronic f
18	24780	Monitor 15" LCD	Manufa	MRP	MONITOR 15	24780		201 Electronic s
19	24781	Monitor 21" .32 DPI	Manufa	MRP	MONITOR 21	24781		201 Electronic s
20	25812	4mb 72pin simm mem 1	Purcha	MRP	4MB 72PIN	25812		101 Electronic c
21	25814	8mb 72pin simm mem 2	Purcha	MRP	8MB 72PIN	25814		101 Electronic c
22	25816	16mb 72pin simm mem	Purcha	MRP	16MB 72PIN	25816		101 Electronic c
23	25818	32mb 72pin simm mem	Purcha	MRP	32MB 72PIN	25818		101 Electronic c
24	25821	Pentium chip 75 Mhz	Purcha	MRP	PENTIUM CH	25821		101 Electronic c

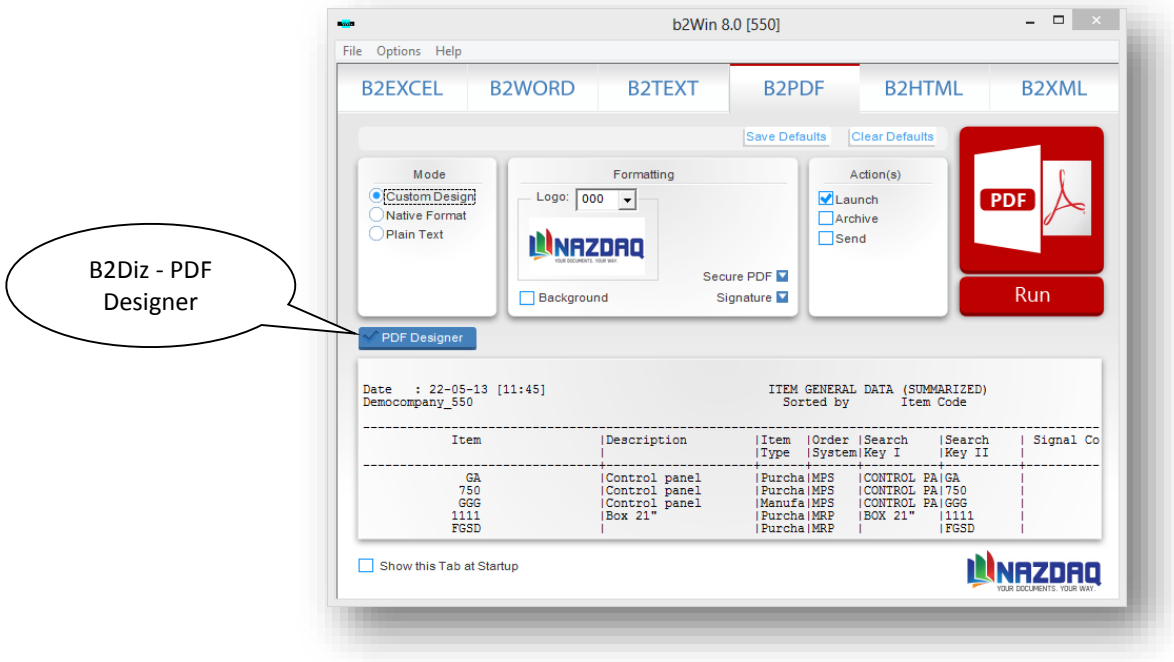
Note*: This is a standard Baan report and Excel conversion can automatically detect its columns, if not we need to customize it using* ***Report Customizer.***

1.2.2 Example of converting report to Custom PDF format

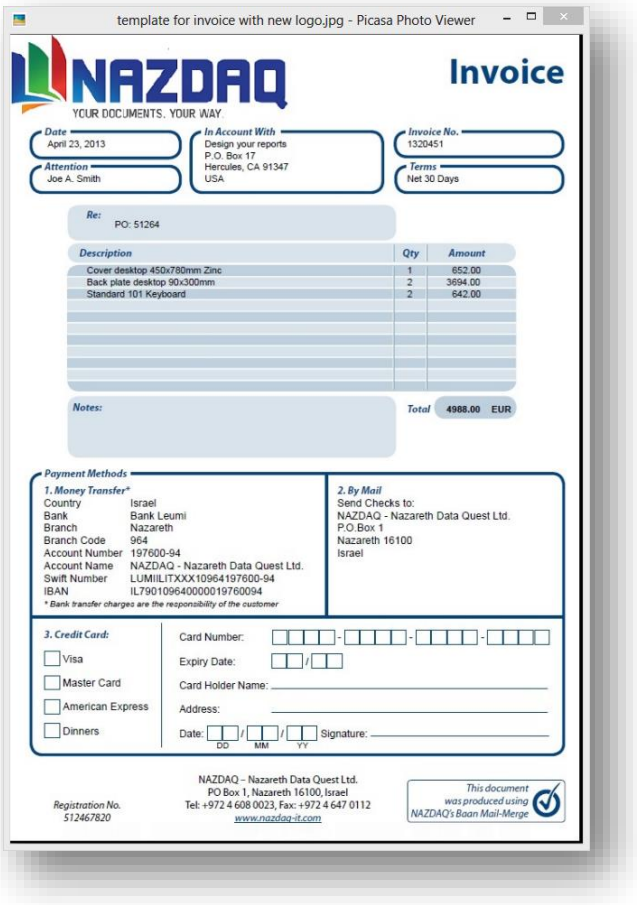
We want to convert a report from Baan with adding graphics to it and changing line spacing and font size:



1) Print this report using ***b2Win8*** Device
2) Set the mode to Custom Design
3) Choose a logo in *b2Win* to be used
4) Change background from tccom2cust8 session
5) Change paper type to Landscape
6) In *b2Win* we click on ***PDF Report Designer*** button and a friendly interface will be launched to help you design your PDF:



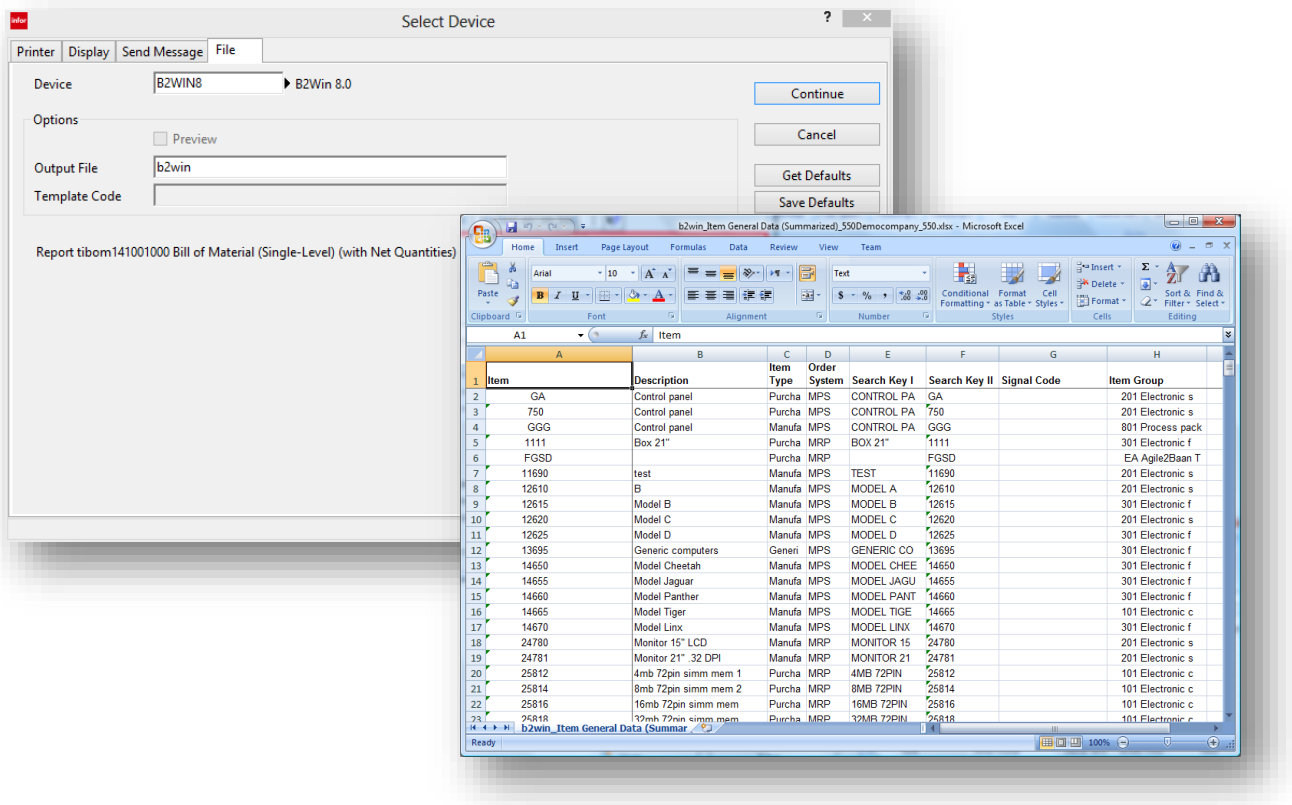
7) An example of such designed PDF:



1.3 Introducing Auto Mode

Auto-Mode is a way to convert reports directly into your favorite format then to archive, e-mail and print it, without going through the intermediate *b2Win* interface, all with only one click!

Here is an example:



For more info, please review ***Chapter 7 – Auto Mode & Passing Parameters***

2 Report Customizer (RC)

For some reports, additional information need to be given to *b2Win* in order to allow better conversion into tabular mode (mainly ***Microsoft Excel***). If you have a sub-header before or after the main header, or an irregular header, or a different delimiter than the standard **/** in Baan/ERP Ln reports, it is suggested to use the ***Customize*** option in Order to allow better report conversion. Every report can have a different customization, to do that you need ***Report Customizer***.

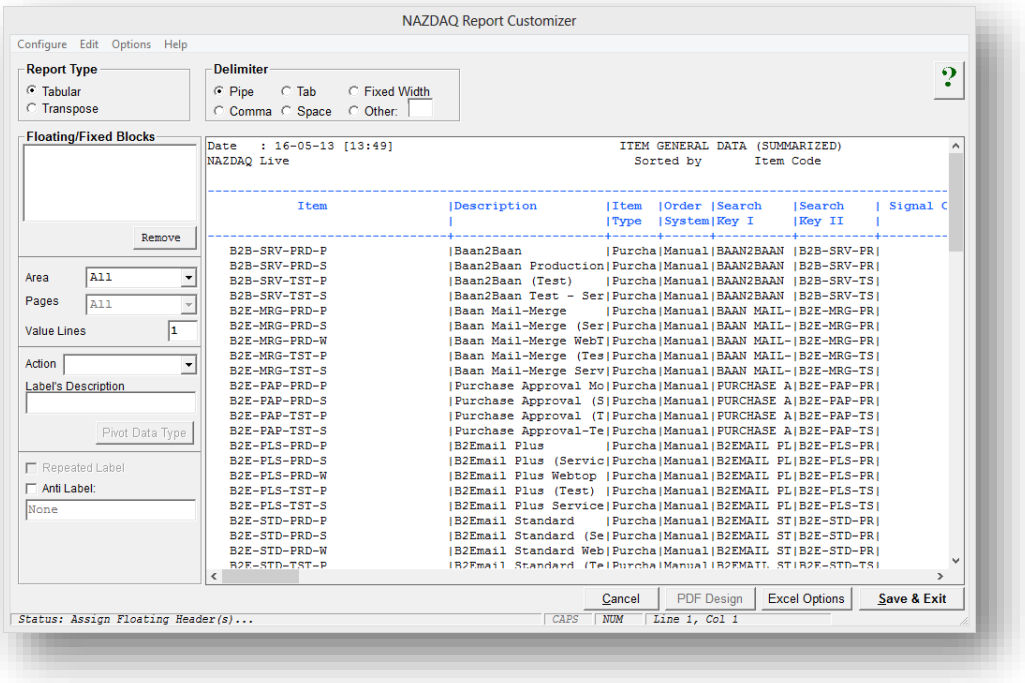
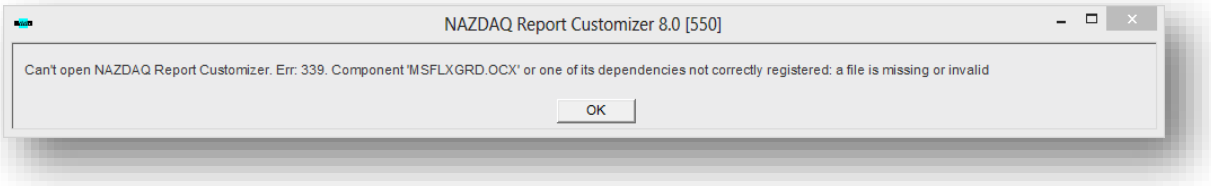


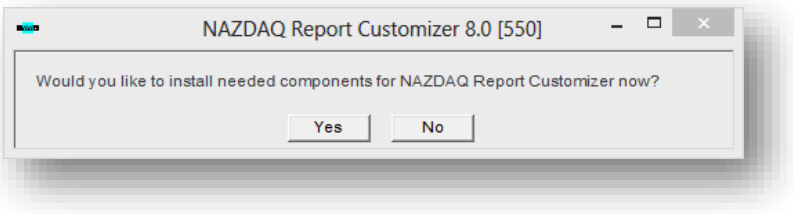
Figure 1 - *b2Win Report Customizer* - Main screen

2.1 Before using Report Customizer

Before you can use the ***Report Customizer***, when you first try to run the ***Report Customizer***, you may get this message:



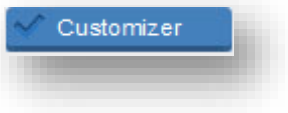
After this message, *b2Win* will suggest to you to install this component:



Click yes to install the components

2.2 Using Report Customizer

To start ***Report Customizer***, in *b2Win* interface click on:



For information about the Report Customizer, how to use it and the different report types, please review ***Report Customizer Manual*** can be accessed under main menu **help-> Customize Help**

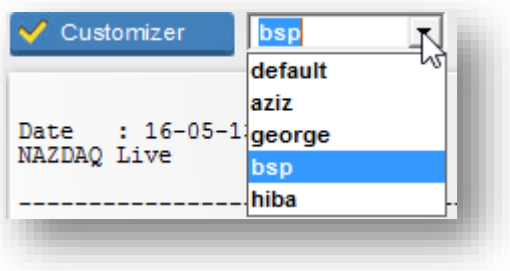
2.3 b2Win Customization per user

The default setting for the system is that one user customizes reports and all other users can use the created customization. For example, the *b2Win* power user can be the one responsible for customizing reports, and all other users will be able to use the customizations he created.

You can also have multiple customizations for every report, where different users will be able to customize reports and save them under his name. In this case, other users can choose either to use their customization or customizations created by others. To activate this you need the variable ***Customize_Per_User*** to be set to ***Yes***.

At run time, every user can choose which customization to execute.

In the following example you can choose between bsp, george, aziz or the default report customization.

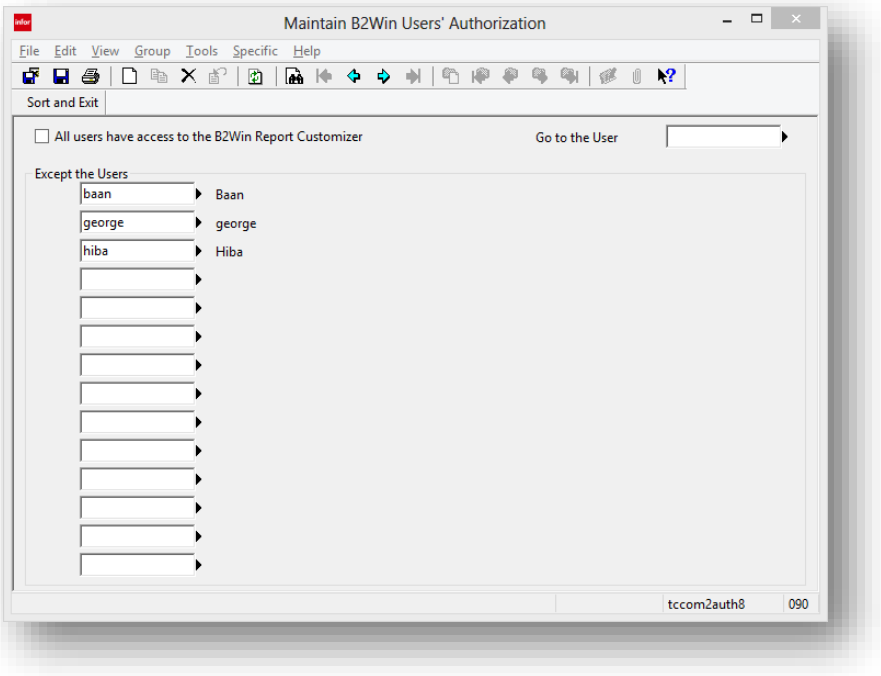


Users who have authorization to customize reports can build their own customizations by simply using a customization made by another user and clicking on the ***Customize*** button. When they finish customizing the report, the new customization will be saved under their user-id.

2.4 Authorization to Customize reports

It is helpful to limit the access to customize reports to key users who have training using the ***Report Customizer and PDF Report Designer***, since any change will affect other users too, especially when ***Customize_Per_User*** is set to "***no***" and we have one customization for every report, adapted by everybody who runs this report using *b2Win*.

Use ***tccom2auth8*** for granting authorization of the ***Customize*** option. If "All users have access to ***Report Customizer and PDF Report Designer***" is unchecked, the list of users is inclusive. If it is checked – the list is exclusive.



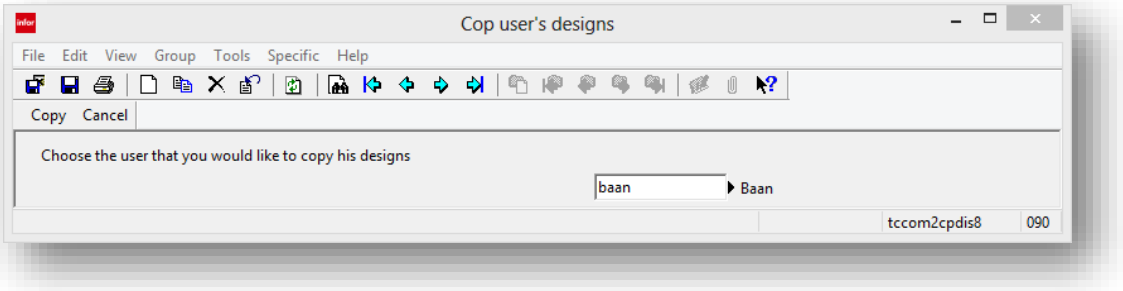
Data in this session is not automatically sorted in the database. In order to sort, use the Special Menu and click on "***Sort, Save & Exit***"

Display (***tccom2disath8***) and Print (***tccom2prtath8***) sessions are also available.

In session ***tccom2usrth8*** - if you are using the authorization per user feature for ***Report Customizer*** (***Customize_Per_User*** is "***yes***"), you will have to insert the users who are authorized to use the Customizer option.

2.5 Copy Customization to another user

In session ***tccom2cpdis8*** – you can copy any user customization to another:



2.6 Global Definitions

2.6.1 Dot_Comma

In case you have some users that have regional settings that are different than the Baan server regional settings – you may want to change the variable ***Dot_Comma*** to yes. In this case, ***1300.23*** will be converted to ***1300,23*** and vice versa.

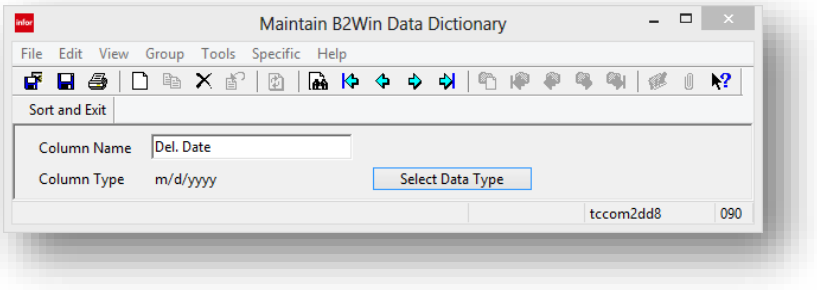
2.6.2 Data Dictionary

Whether you use the ***Customize*** option or not, it is helpful to define some common values in the ***b2Win global data dictionary*** – so that ***Microsoft Excel*** will not "guess" the data type of each column it is converting to Excel. Thus, sometimes a column is converted to Excel in a way that does not match its real data type.

Example:

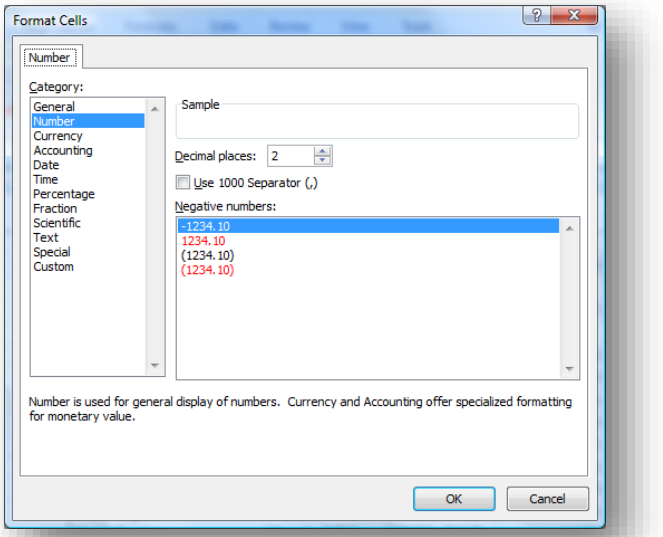
An item number with leading zeros like "***0000146700***" would be converted to the number "***146700***" in Excel. In order to avoid this, the user must define a data type entry for this column.

If you want Excel to force items to be converted as alphanumeric fields, the *b2Win* system administrator should define data types with the session ***tccom2dd8***



1) Run session **tccom2dd8**
2) To create a new column data dictionary item, click on ***Edit -> Insert***
3) Insert ***Column Name***

4) Click on ***Choose DataType*** button



5) Chose data type and click ***OK***
b2Win already includes few data types for standard Baan reports. For users with non-English reports, a different set of data types need to be defined. In any case, this data type serves as a default, unless overwritten by a report-specific data type defined with the ***Report Customizer***.

Note: The title in the Data Dictionary screen should be the exact title as appears in the Baan reports. If the title is more than one line, a space should be used in the field "***column name***" to indicate a new line.

Display (***tccom2disdd8***) and Print (***tccom2prtdd8***) sessions are also available.

3 Graphics within b2Win

3.1 Introduction

One of the great features in *b2Win* is the ability to take output reports from Baan and turn them to graphic documents in different formats. The following chapter will discuss the different graphic options and the methods to fine tune graphics to best fit your needs.

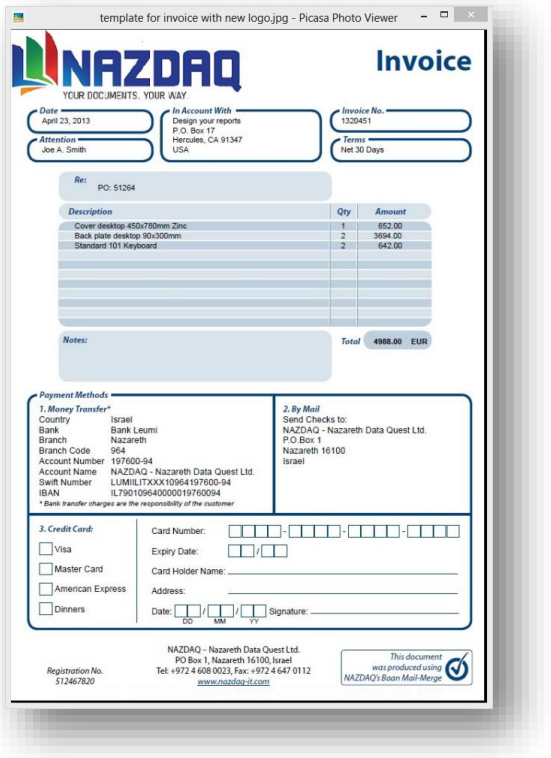
One of the popular uses of *b2Win* is to run an output from Baan into Microsoft Word, or PDF format, with the company logo and some footer information that may include the address. Other uses may include a background image (as a pre-printed stationary).

Some documents include graphic information that come from Baan; such as bold and italic and different font character size. *b2Win* allows you to produce documents that include these graphics using ***Native Format Mode***. Usually, Plain Text mode produces the files with one character size and plain font style.

An additional Add-On **b2Diz – The PDF Report Designer**, enables production of 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.

3.1.1 B2PDF – Custom Design Mode, with logo and background image

Here's an example of PDF file produced from b2Diz – PDF Report Designer:



3.1.2 B2Word – Table Mode, with logo

Level	Position	Item	Description	Quantity	Un.	Amount	Amount
						Net	Gross
1	10/ 1	25816	16mb 72pin simm	1.0000	pcs	271.2500	271.2500
1	20/ 1	25825	Pentium chip 133	1.0000	pcs	280.5000	280.5000
1	30/ 1	25831	Power Supply 200	1.0000	pcs	89.2500	89.2500
1	40/ 1	25846	Hard Drive 1280	1.0000	pcs	172.4000	172.4000
1	50/ 1	26835	Diskette Drive 3	1.0000	pcs	29.2500	29.2500
1	60/ 1	26810	CD-ROM 10 speed	1.0000	pcs	161.7500	161.7500
1	70/ 1	26828	Fax modem 28.8 i	1.0000	pcs	189.0000	189.0000
1	80/ 1	26854	Video Card Diamo	1.0000	pcs	426.7500	426.7500
1	90/ 1	26874	Mouse PS/2	1.0000	pcs	36.7500	36.7500
1	100/ 1	26884	Standard 101 Key	1.0000	pcs	51.7500	51.7500
1	110/ 1	25895	Motherboard 256	1.0000	pcs	700.0000	700.0000

3.1.3 B2HTML – Table Mode, with logo

MULTI-LEVEL COST PRICE CALCULATION

Level	Position	Item	Description	Quantity	Un.	Amount	Amount
						Net	Gross
1	10/ 1	25816	16mb 72pin simm	1.0000	pcs	271.2500	271.2500
1	20/ 1	25825	Pentium chip 133	1.0000	pcs	280.5000	280.5000
1	30/ 1	25831	Power Supply 200	1.0000	pcs	89.2500	89.2500
1	40/ 1	25846	Hard Drive 1280	1.0000	pcs	172.4000	172.4000
1	50/ 1	26835	Diskette Drive 3	1.0000	pcs	29.2500	29.2500
1	60/ 1	26810	CD-ROM 10 speed	1.0000	pcs	161.7500	161.7500
1	70/ 1	26828	Fax modem 28.8 i	1.0000	pcs	189.0000	189.0000
1	80/ 1	26854	Video Card Diamo	1.0000	pcs	426.7500	426.7500
1	90/ 1	26874	Mouse PS/2	1.0000	pcs	36.7500	36.7500
1	100/ 1	26884	Standard 101 Key	1.0000	pcs	51.7500	51.7500
1	110/ 1	25895	Motherboard 256	1.0000	pcs	700.0000	700.0000
1	120/ 1	24780	Monitor 15" LCD	1.0000	pcs		
2	10/ 1	27845	Box 15"	1.0000	pcs	45.2500	45.2500
2	20/ 1	27830	PCB Cristal Vers	1.0000	pcs	129.2500	129.2500
2	30/ 1	27865	Screen 15"	1.0000	pcs	105.5000	105.5000
2	40/ 1	29810	Switch-set	3.0000	pcs	17.2500	17.2500
1	130/ 1	28710	Enclosure Deskto	1.0000	pcs		
2	10/ 1	28820	Cover desktop 45	1.0000	pcs		
3	10/ 1	28910	Steel plate zinc	0.5300	pcs	18.3750	18.3750
2	20/ 1	28830	Back plate deskt	1.0000	pcs		
3	10/ 1	28910	Steel plate zinc	0.2100	pcs	7.3500	7.3500
2	30/ 1	28840	Front desktop 90	1.0000	pcs		
3	10/ 1	28911	Steel plate phos	0.1100	pcs	5.7750	5.7750
2	40/ 1	29830	Screw	2.0000	pcs	2.5000	2.5000
2	50/ 1	29840	Nameplate	1.0000	pcs	3.7500	3.7500
2	60/ 1	29850	Foot	1.0000	pcs	2.5000	2.5000

3.2 Defining a Header and Footer

With *b2Win*, you can create ***PDF***, ***Microsoft Excel***, ***Microsoft Word*** and ***HTML*** documents with your company logo (Header and Footer images).

If you define a header and footer for company **000**, it will be used as the default in all documents for all companies. If you want to define a different logo/footer for a specific Baan company, you must add an entry for this company using ***tccom2lgo8.*** In case you wish to use more headers and footers, not directly related to Baan logistic companies, you define a dummy company that starts with a letter (***GEO***, for example).

There are two types of Logo: JPEG logo, which works in all file types conversion, and PDF logo, which works only with PDF files.

Why to use PDF logo

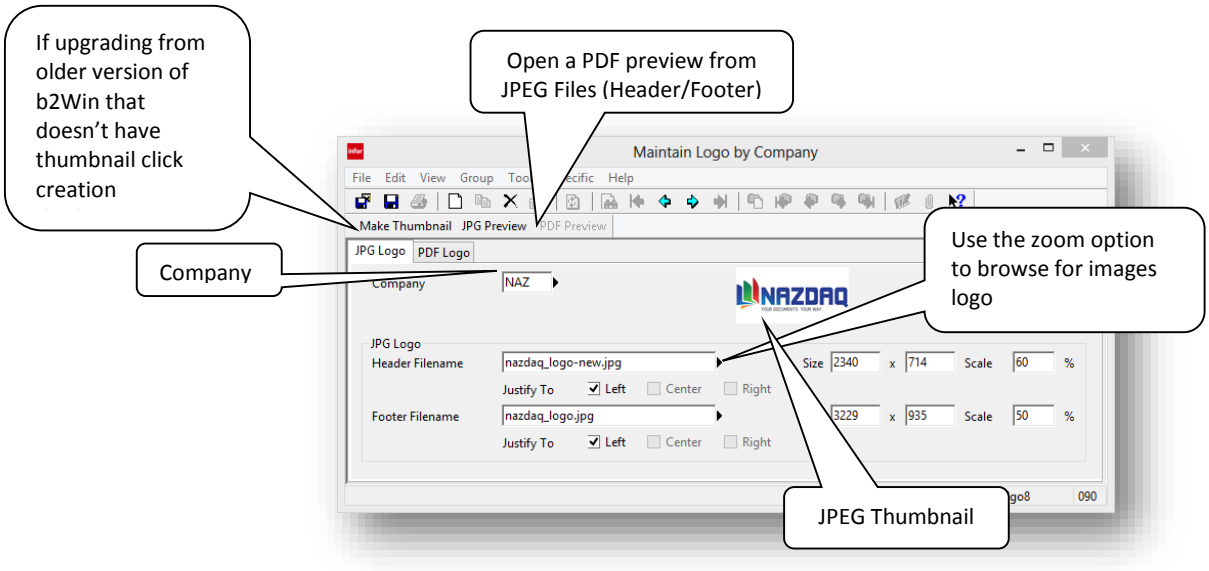
PDF logo keeps the quality of the logo with any size; because PDF uses vector graphics instead of pixel graphics.

Header Distance

In order to enlarge the distance (in points) between the page top and the top of the header, you may want to change the value of ***Header_Dist*** (Default is 10), in b2win.ini file.

3.2.1 JPEG Header and Footer

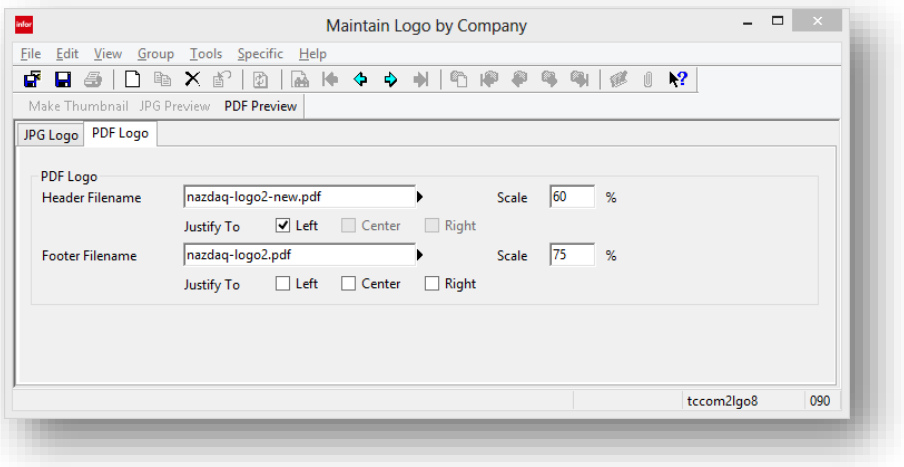
JPEG files serve as headers and footers; they can be defined in this way:



1) In session ***tccom2lgo8*** go to ***Form1***
2) You can select a company or create a new virtual company
3) Browse Header and footer JPEG file from the zoom option next to form. Note:
   You must have Images with RGB format; you can check your files by its properties
   If it's not an RGB you need to convert it using a Photo Editing application
4) Specify Scale and Justify for both
5) Save session

3.2.2 PDF Header and Footer

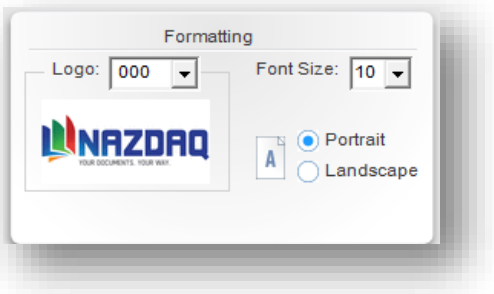
When converting report to PDF format using a Graphical mode, *b2Win* will first look if there is logo defined for this specific logo specified with PDF file, which we specify in ***Form2***. If no PDF Header or footer is set, it will use JPEG images from ***Form1.***



1) In session ***tccom2lgo8*** go to ***Form2***
2) You can select a company or create a new virtual company; this will redirect you back to ***Form1*** to specify its name
3) Browse Header and footer PDF file from the zoom option next to form
4) Specify Scale and Justify for both
5) Save session

3.2.3 Selecting Logo from b2Win

When you run a report to the *b2Win* device, you can select the logo by picking the company:



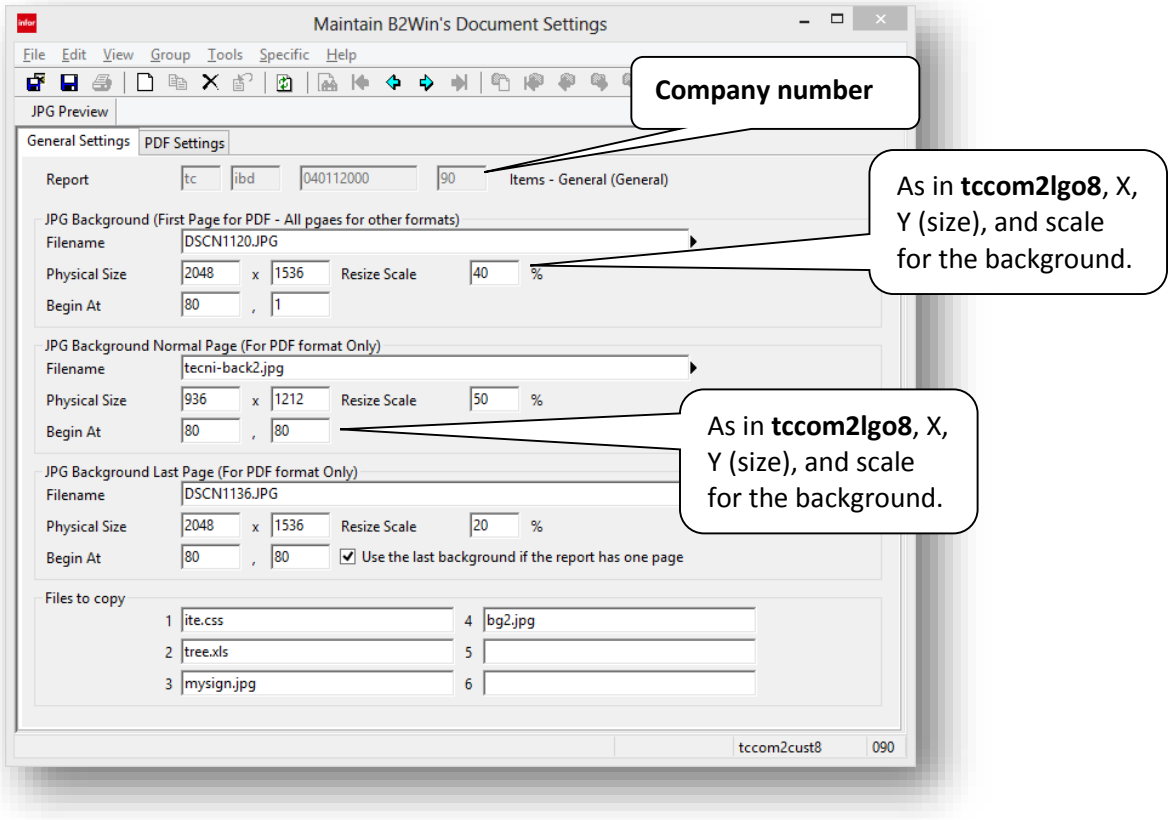
Note: Only JPEG logo can have a preview thumbnail, PDF logo won't be displayed in here

3.3 Defining a background Image

You can create PDF, Word, and HTML documents with a background image, like in pre-printed forms. This background image can be defined per report code and company number. All you need to do is create a jpg file, and it can become part of every document produced using *b2Win*.

You can define 3 backgrounds for company **550** one for first page, middle and last, with option check box to define last background for all pages if the report has one page.

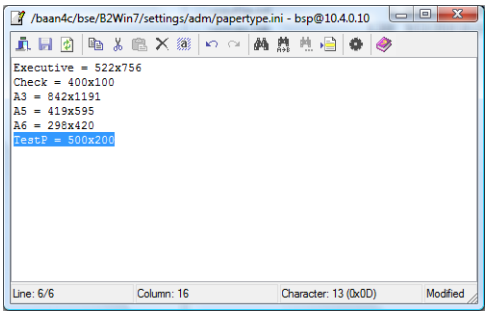
We define the background image using the session **tccom2cust8**, as in the following example:



3.4 Fine-Tuning your document

3.4.1 Paper Types

Depending on your country and the type of papers you use, you can define a different paper type with the values you chose



Add a new paper type configuration:

1) Go to ***$BSE/nazdaq8/settings/adm/papaertype.ini***
2) Add a new paper type with a syntax like this: ***<Paper type name>*** = ***<x>***x***<y>***
3) Save ***papertype.ini*** file

You can also simply use the already defined paper types in ***b2Win -> Formatting -> More Options***

3.4.2 Margins (Applicable for PDF and Microsoft Word only)

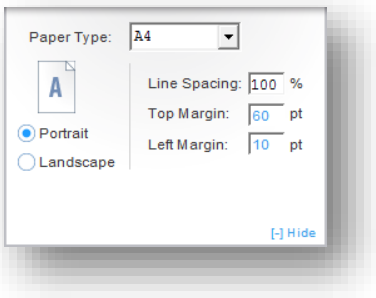
You can change the Margins from Top and Right inside a PDF or Microsoft Word document; for both Landscape and Portrait paper sizes

To change the default configuration:

1) Open ***$BSE/nazdaq8/settings/adm/b2win.ini*** for editing
2) Fine-tune the top/left margins for a portrait document by changing ***P_Top*** and ***P_Left***.
3) Fine-tune the top/left margins for a landscape document by changing the ***L_Top*** and ***L_Left***.
4) Fine-tune the header distance between the logo and the top of the page by changing ***Header_Dist***.
5) Save ***b2win.ini*** file

Now the default margins for both Portrait and Landscape will be the values you specified here

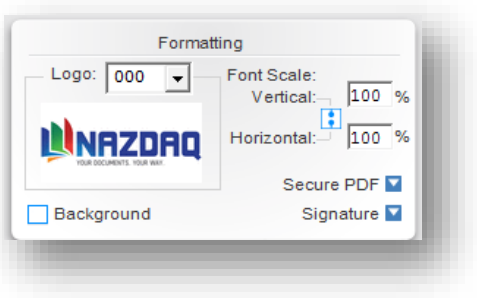
Note: Users can change their own values from ***b2Win Formatting window -> More Options***



If the user doesn't set the margin values then the default configurations defined in ***b2win.ini*** will be used, these default values will appear in blue in Margin top/right fields.

3.4.3 Font Size

The font size chosen in the *b2Win device* serve as the font size used in the output file.
In ***PDF*** it is a bit different.



3.4.4 Font Scale

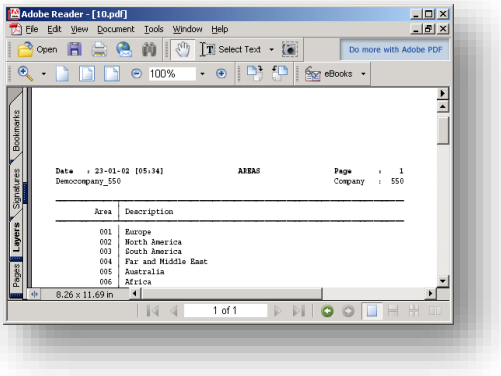
PDF Horizontal Font Scale:

If the font size is set to 120% it means to scale letters from their original horizontal size.
When Font size is set to 10, letters will not be scaled.

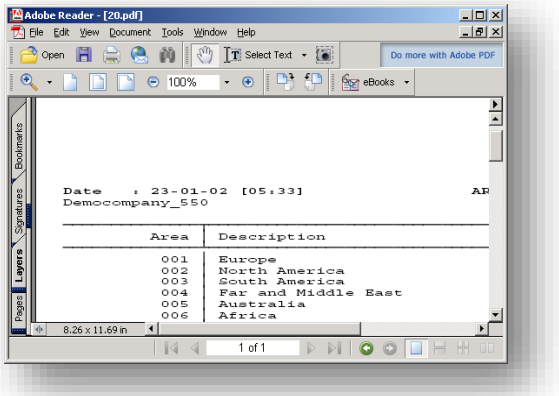
PDF Vertical Font Scale:

To cause the font in PDF to scale vertically, you need to change the value inside ***B2PDF tab -> Formatting -> Vertical Font Scale***; the value is being calculated in the same way as in Horizontal Font Scale

Example:
In this report font size = ***10***:

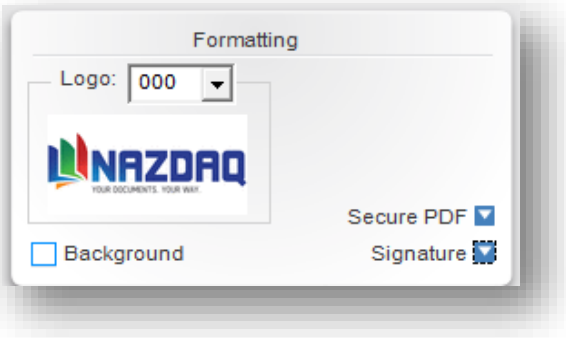


When changing the font size to ***20***, report will look like this:



3.5 PDF Settings

PDF settings are available under the ***b2Win Menu -> B2PDF -> Formatting:***



Signature Options (Works only if you have a licensed ***b2Email*** product installed):

- Use Signature to sign documents.

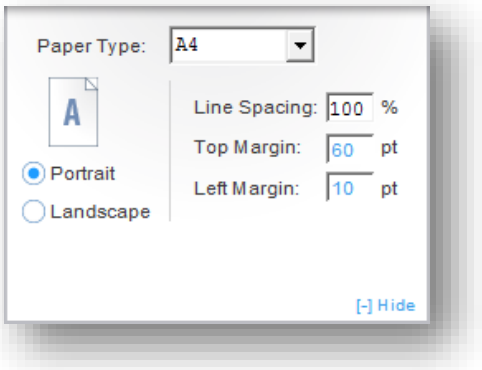
- Sign only the last page of the document
- Define a specific position for the signature. The default is taken from ***tccom2conf8*** (Left/Right)

Secure PDF settings:

- Disable or enable copy & paste text from the PDF
- Disable or enable printing the PDF file
- Disable or enable editing the PDF file even with Acrobat Writer
- You also can lock the PDF file with a chosen password

Document settings:

- ***Line Spacing*** - defines the scale between two lines



4 Macro mode within b2Win

4.1 Introduction

If you like to produce a report with a different look than the one automatically produced by *b2Win*, you can assign a customized macro for a specific report. This option is activated in ***B2Excel*** and ***B2Word*** by checking the ***Macro*** mode in ***b2Win Main window under Mode.***

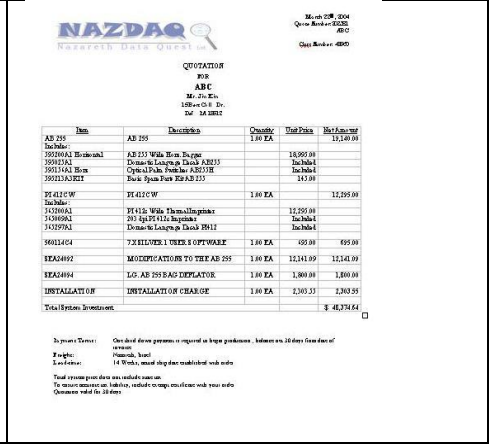
Macro formats supported such as: MS Excel (XLS – supports older office version for macro, XLSM – macro – enabled workbook, XLTM – macro – enabled template, XLAM – Macro Enabled add-in). MS Word (DOC, DOT – Older office version macro support, DOCM – Macro-Enabled Document, DOTM– Macro-Enabled Template).

4.2 How to write your own macros

Microsoft Excel and *Microsoft Word* allow you to write Macros with Visual Basic. You can do that with Tools/Macro/Visual Basic Editor. ***Sample macros are provided with the standard package like tiitm040102500.xls and tccom743611000.dot.***

These macros read file ***b2win.txt*** (The text file with report output coming from Baan) file **b2win.new** (File ready for loading into table mode), and file **report.rtf** (RTF file produced by Baan/ERP Ln) and run manipulations to get the desired output result. These "***manipulations***" may include templates, bookmarks, watermarks, different formatting and more.

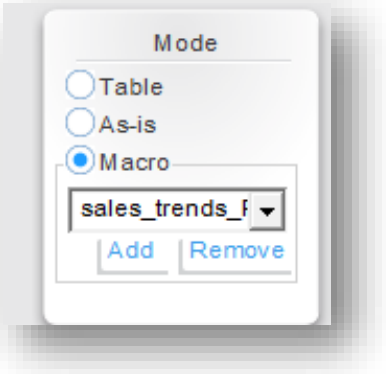
The following is an example of what can be done with templates and bookmarks:

Macro inside this template	After running the macro
	

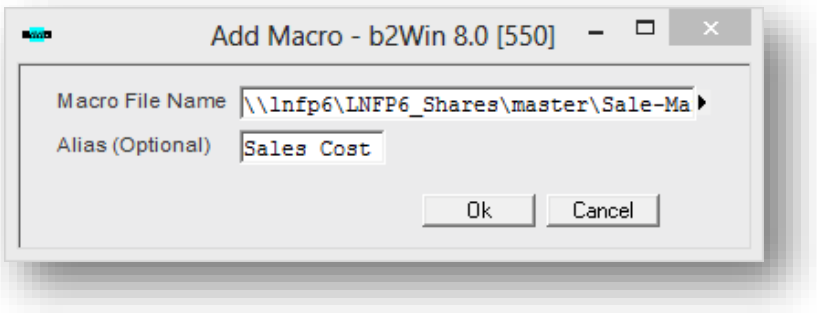
The *B2Word* macro merged the quotation data coming from Baan into the *Microsoft Word* template to produce a professional look of a quotation that can be edited in *Microsoft Word* before sending it to the customer.

Define your own macro for a specific report:

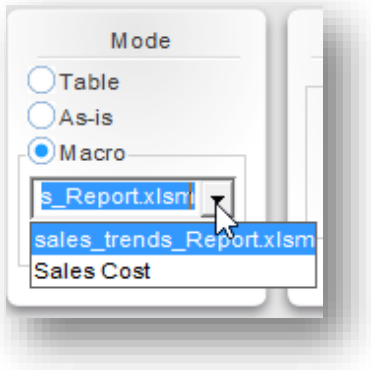
1) Write your own macro in Visual Basic or any tool that creates ***VBA*** scripts
2) Save it under a shared directory in the network, if you want enable other users to be able to run it too.
3) To add/remove macro to both ***B2Excel*** and ***B2Word*** formats under ***Mode*** as follow:



When pressing on “Add” button a window will open to choose the macro, you may define an alias to the macro under the “Alias” field. Then it will be added to the drop down list:

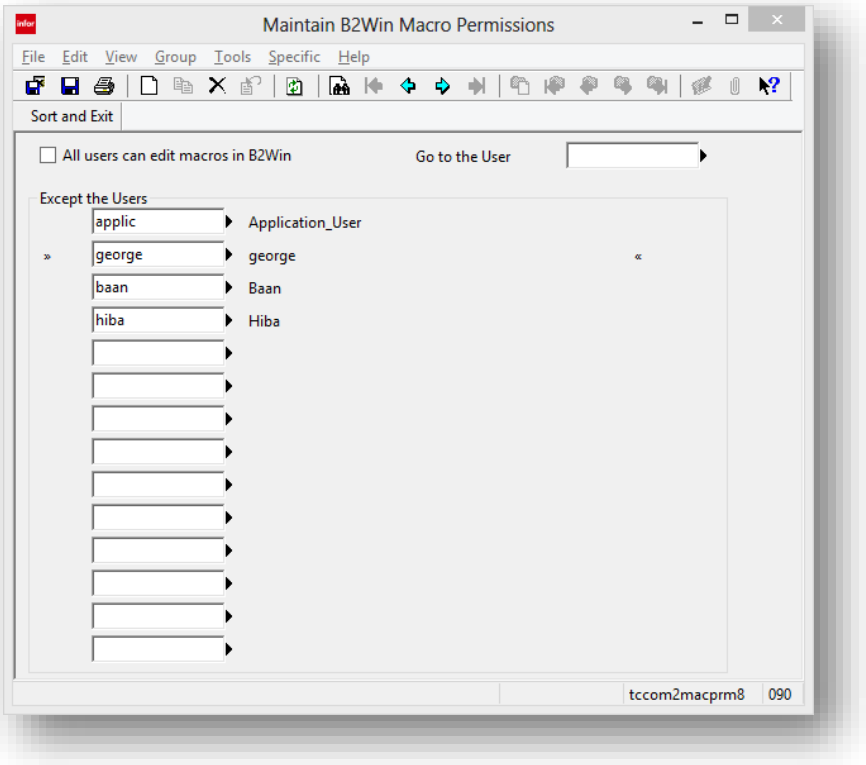


List of macros will be saved per report and per format:



Define permissions for macro:

In the following session, you can define user permissions for macro editing. Checking the option "all users can edit macros in b2Win" will enable public permissions for users to edit, or define a list of users that can't have this permission in **tccom2macprm8**:



Knowledge in Visual Basic is required in order to write these macros. Contact the NAZDAQ services team at info@nazdaq-it.com if you need help writing a customized macro.

5 File management with b2Win

5.1 Introduction

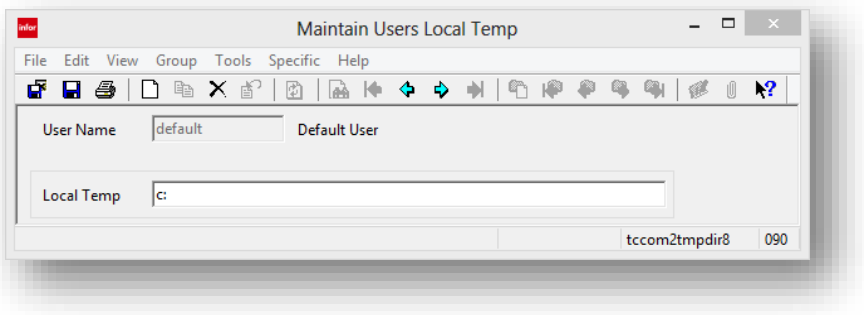
b2Win creates multiple temporary files on the server and the client in order to produce the end result. This chapter discusses these files and how to best manage them for better performance and maintenance of your system.

Temporary *b2Win* files are created first on the Baan server and then transferred to the local machine. Note that *b2Win* does not use ***FTP*** to transfer from the server to the client – but rather the Baan function server2client, which uses the connection already existing between the Baan server and the BW client to establish a data transfer session.

5.2 Defining a local temporary directory on the client

The default location for creating the *b2Win* client temporary directory is C:\

If you have users for which C: is not an available option (***Citrix*** for example), use **tccom2tmpdir8** and define a specific location for the ***b2Win Local Directory*** for each one of them.



If most of your users use ***Citrix***, change the default value in **tccom2tmpdir8** to be the directory on the meta-server where you wish to have the *b2Win Local Directories* created. For others, you must define them one-by-one.
The default name of the local *b2Win* directory is ***b2w8<userid>.*** By changing the variable ***Dynamic_Temp*** to No in ***b2win.ini***, the name of the directory will be mere b2win. You can also use the predefined DOS variables like %TEMP%.

Data in this session is not automatically sorted in the database. In order to sort it, go to the Special menu and click on "***Sort, Save & Exit***"
Display (***tccom2distmp8***) and Print (***tccom2prttmp8***) sessions are also available.

5.3 Managing the temporary directory on the server

By default *b2Win* creates a directory ***in $BSE/tmp*** under the name ***<userid>mmddyyhhmmss***

Since other temporary files and directories are created in ***$BSE/tmp***, you may wish to change the location of the b2Win temporary files by changing the variable ***Server_Temp***. By assigning a value to this variable, a special directory is created underneath ***$BSE/tmp*** with the name of the value in ***Server_Temp***. This is recommended as it makes tracking easier and eases the maintenance work of having to clean all these files, based on the temp cleanup procedure in your organization

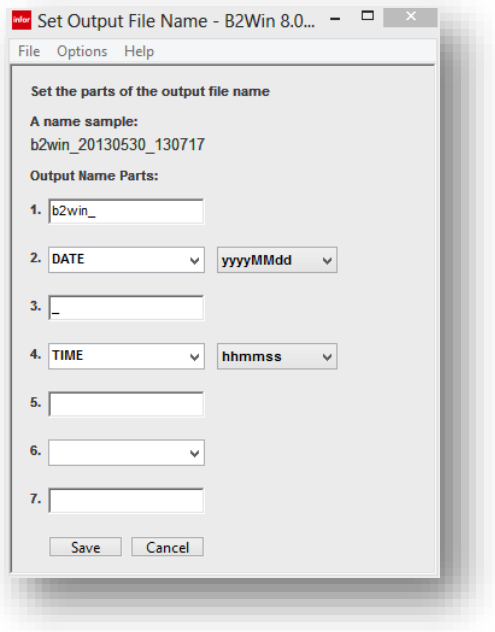
5.4 How often to copy files from the server to the client

In addition to data files, *b2Win* copies different programs to the ***b2Win local temporary directory*** every time *b2Win* is executed. Some companies may find this to be an overload, especially if they have a slow connection or work through WAN. In order to disable copying of the program files in every run, you may wish to change the value of **Copy2Local** variable to ***no*** inside ***b2win.ini*** file.
If a patch is applied and new program components are added, the variable must be set back to ***yes*** – until all users have the latest version of these programs.

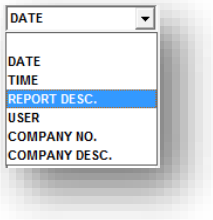
5.5 Name of resulting file

The variable ***File_Name*** decides the default name of the resulting file in *b2Win* that is generated inside the client file system. Another possible value for this variable is ***rep_date_time***. This is good in order to produce a unique file every time *b2Win* is launched. Any other value used for ***File_Name*** will be used for every run as is. In this case, the resulting file will be overwritten by every run.

For each report/user you can set a smarter file name by using the ***Set File-Name*** option under ***Options***



In this window you have seven fields that make the file name. Four fields are used for free text and the other three contain special Variables: ***Date, Time, Report Description, User, Company Number*** and ***Company Description***

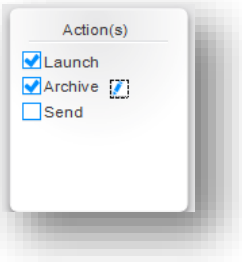


This file name is saved per ***user*** per ***report***.

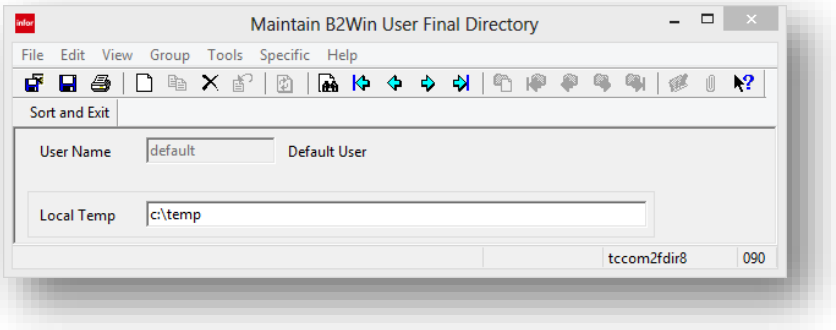
5.6 Archiving Directory

Every User using *b2Win* can archive the output files he converts to a specific location in his file system. Files can be done in two levels user or report.

To use this option you need to have Archive button checked in *b2Win* whenever you convert any document to any format

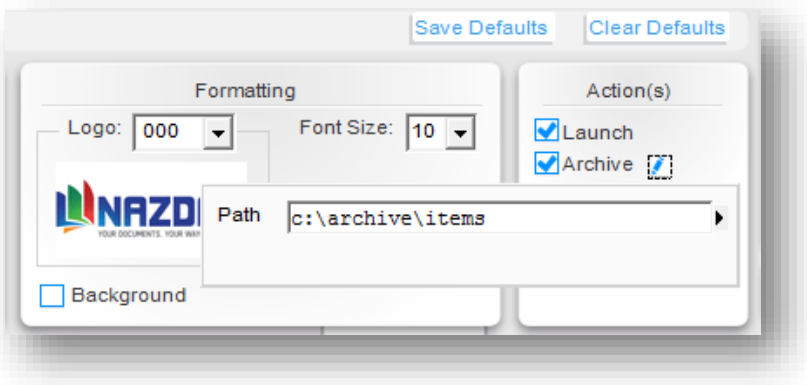


Your final file can be archived in the directory you specify that is other than the local temp directory. To archive files in user level you need to define your final directory using ***tccom2fdir8***, for each user or default for all users.



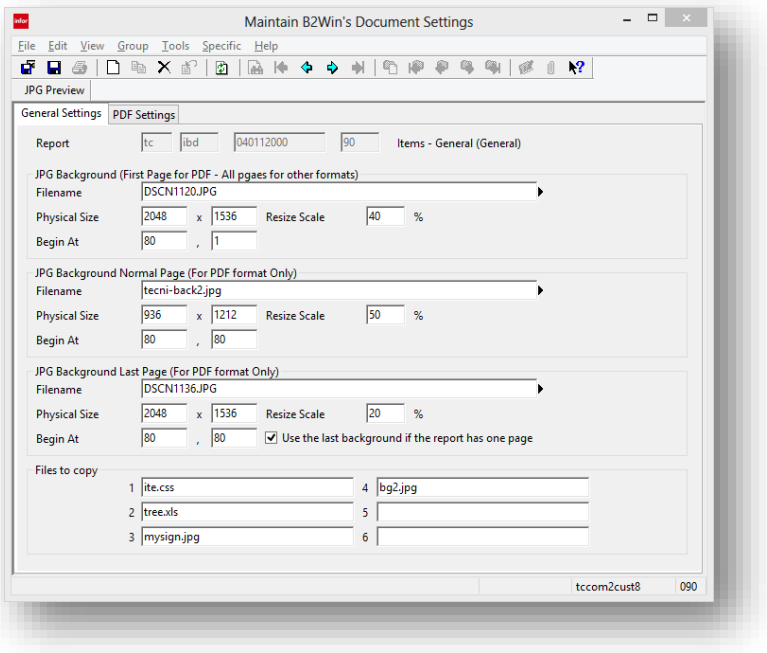
Display (***tccom2disfd8***) and Print (***tccom2prtfd8***) sessions are also available.

To archive files in report level you need to define the directory path in which the files to be copied to. When saving this archiving path, it will be saved per user per report per format.



5.7 Copy files to Client upon conversion

In this session (***tccom2cust8***), you can define files to be copied from the server to the local client and use it in different ways to customize your report.



For example, in your report you use a specific CSS file and you want it to be copied each time a report is converted, or you can copy your personal signature jpg file and use a customized macro to add it to your output.

In order to copy a files to local you need to place it under directory ***$BSE/nazdaq8/settings/adm*** in server, and insert the file name to ***tccom2cust8*** session under ***Files to copy*** box.

5.8 b2Win.ini – List of all Parameters

This file is used to save global configuration for *b2Win* in order to be used in all the system, we have covered them separately in this manual, and here is a full list of all parameters inside ***b2win.ini*** file which is located under ***$BSE/nazdaq8/settings/adm***

```
|************************|
| INI File for b2Win 8.0 |
|************************|
Paper_Type = <Available papertype: A4, Letter or any type configured in
             papertype.ini>
```

```
Dot_Comma = <Yes/No>
In earlier versions of b2Win, "Regional Settings" for the Baan Server and the client's
PCs needed to be the same.  In this version, however, you can use the Dot_Comma feature.
If your Baan server settings and the client's regional settings are not the same, set
Dot_Comma = Yes.

Copy2Local = <Yes/No>
b2Win copies different exe programs to Local_Temp every time b2Win is used. You can
decide to have these files deleted every time the device finishes processing the files.
For b2Win installations with many slow machines, it is recommended to change this
variable to No.

Customize_Per_User = <Yes/No>
An option to make customization reports per user. In previous versions, reports
configurations were saved per report - For all users to use. In this version, you can
decide to use user-specific configurations, or global report configurations. Users can
run any configuration - the report default configuration, or any configuration made by a
specific user.

Stop_Uncustomized = <Yes/No>
An option to alert a message when a non-configured report is printed in Auto mode

Stop_Non_Standard_Reports = <Yes/No>
An option to pop-up an alert when report with an irregular header is printed to b2Win


Auto_Progress_Bar = <Yes/No>
Possibility to add a progress bar when Auto-mode is used. This progress bar will show
which report configuration is used.

|************************|
| Temp Directories       |
|************************|
Server_Temp = ${BSE}/tmp/b2wdir
b2Win creates many temporary files on the Baan $BSE/tmp directory. The temporary
directory can be changed with this variable.  A special directory is created underneath
Server_Temp for every run of b2Win, which then makes tracking easier and eases the
maintenance work of having to clean all these files.

Dynamic_Temp = <Yes/No>
If Yes - the name of the local directory will be b2w<user>.  If No - the name of the
local directory will be b2win.


|************************|
| PDF and Word Settings  |
|************************|
P_Left = 10
Size of the (text) left margin in Portrait (in points).

P_Top = 120
Size of the (text) top margin in Portrait (in points).

L_Left = 18
Size of the (text) left margin in Landscape (in points).

L_Top = 60
Size of the (text) top margin in Landscape (in points).

Header_Dist = 10
```

The distance between the header and the top of the page.

File_Name = <value>
Available values:
rep_date_time - it will generate different file names every run. This is good to compare between two files while both are still open.

AllowBidi = <Yes/No>
AllowArabic = <Yes/No>

```
|************************|
| b2Email Settings       |
|************************|
```

B2E_Session = <session id>
Possible values = otccom2eml65
This is where you define the b2Email Plus version integrated with b2Win.

B2E_Webtop_Session = <session id>
Possible values = tccom2eml65w
This is where you define the b2Email Plus version for b2Win Webtop.

Use_Fontforge = <Yes/No>
Specify if to use Fontforge in PDF conversion or not

B2pdf_Timeout = *<ms to wait for PDF creating>*
Specify the timeout to b2pdf creation, unit are in mille seconds

Default_Tab = <Value>
Available Values: b2word, b2pdf, b2excel, b2html, b2xml, b2text

Link_Company_For_Logo = <Yes/No>
If Value is YES then changing the logo in one of the format tabs will change it to all the rest of formats.

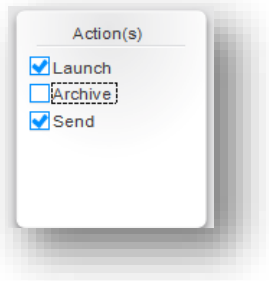
6 E-mail, Print and Fax from b2Win

6.1 E-mail & Fax Integration

You can E-mail reports directly from *b2Win* using ***b2Email Plus***, another Add-on from ***NAZDAQ.***

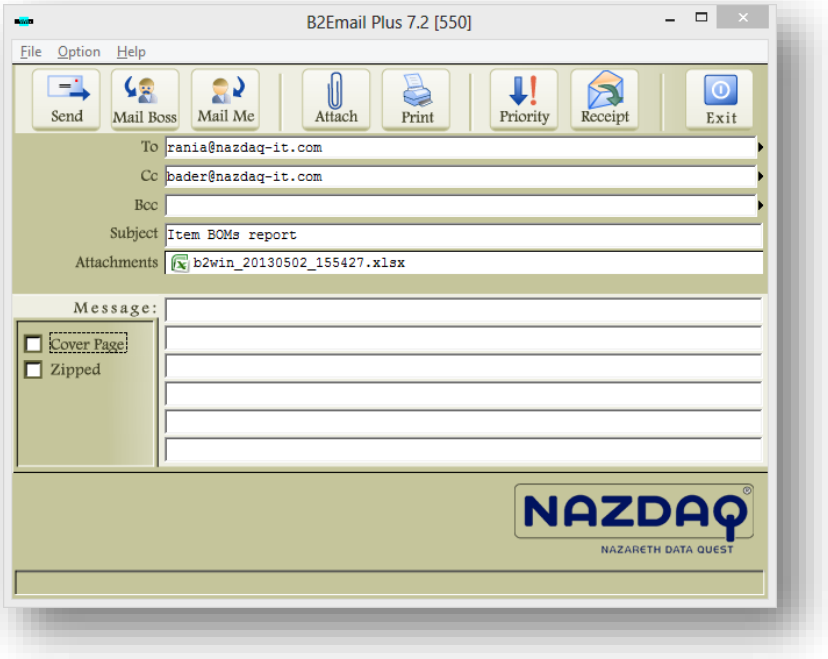
b2Win and *b2Email Plus* can work together to save you time. With one click, you can have the nice XLS report in your inbox, or even printed.

b2Win will activate *b2Email Plus* when the send option is checked (available in version 6.5 and higher):



In *b2Email Plus*, the user can:

Send the e-mail to his Boss, himself, 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 the user uses *b2Email Plus*; all his settings will be used:

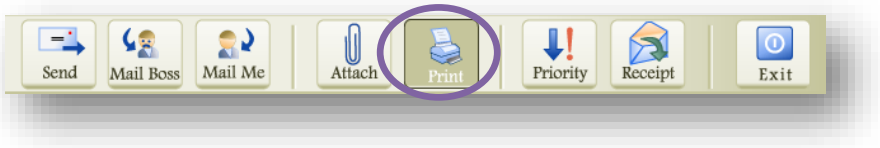


The default will also be used in auto mode. (Review the next chapter for more details about ***Auto mode***)

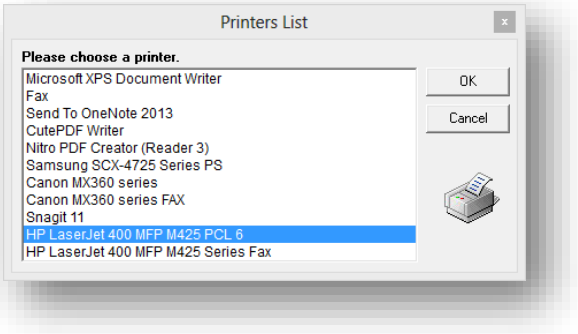
6.2 Print from b2Win

When *b2Win* sends the report to *b2Email Plus*, it can be printed in two ways:

1) To *b2Email* default printer that is defined in tccom2conf8, using the "***Print***" button



2) Or you can click on ***File -> Print*** to get the list of printers available on your computer:



7 Auto Mode & Passing arguments

7.1 Introduction

In this chapter we will see how we can define arguments for specific *b2Win* devices (in "Path"), and in the same way, we can pass arguments to *b2Win* device, while printing (in "Output file").

Using these arguments help in automating conversion of reports. The following are examples of how to best automate the *b2Win* conversion:

1) Creating a device that automatically converts to a specific file type without going through the intermediate *b2Win* interface. We can create a device for each format, such as ***B2Excel***, ***B2Word***, ***B2PDF*** and so on

2) Convert a report to ***PDF***, with logo, with a specific Password protected (all options in the *b2Win* interface can be set in a pre-defined file)

3) Convert a report to *b2Win*, always using george's *b2Win* parameters. George is our Power user and he creates customizations and sets the different options for all of us

7.2 b2Win available arguments

The following switches are available for passing arguments for *b2Win:*

-type <type>, -launch, -archive, -send, -user <User>, -file <Filename>, -b2email <b2Email Actions>, -manual

7.2.1 Type: *(-t/-type)*

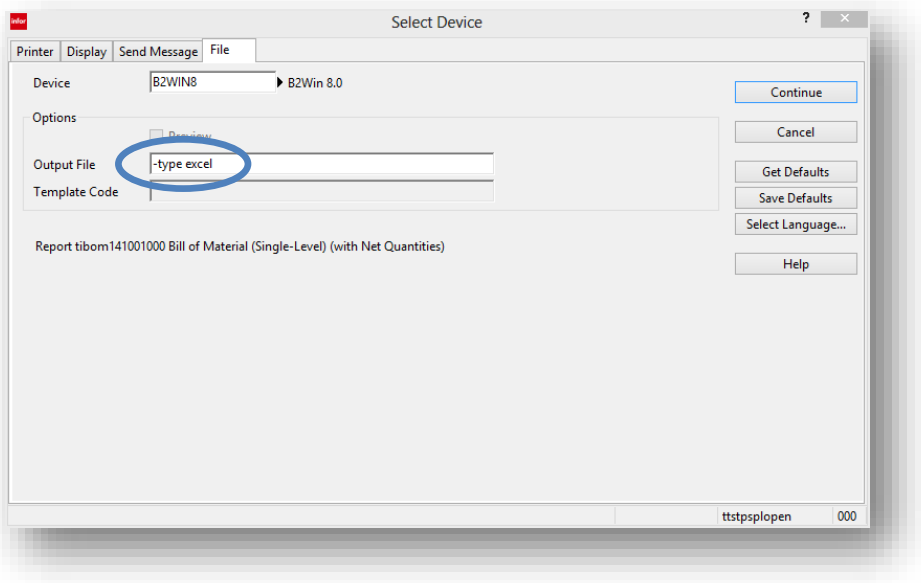
b2Win can convert a report to six kinds of file types, with this argument (-t/-type); we can tell *b2Win* to convert the report to a specific file format

Available types are:

- ***excel*** – To convert to Excel file format
- ***word*** – To convert to Word file format
- ***edit/text*** – Plain Text file
- ***pdf*** – PDF File
- ***html*** – HTML File with its CSS and images included
- ***xml*** – XML Format

Example:

We set a device like this:



When we click on Continue, an Excel file will be generated with the user default settings.

7.2.2 Actions: *(-launch/-archive/-send)*

You can choose what action to take when running b2Win device, there are 3 actions available
-launch - Open output file when conversion is finished
-archive - Save the output file in archive folder
-send - send the output file in email using ***b2Email Plus***

If one or more argument is set, it will override other options that is set either in defaults saved by user or a file that you specify using –file argument, this argument have a higher priority always.

For example:

If in user defaults have the 3 options checked (archive/launch/send) and in auto mode we set only –launch action:

–type Excel -launch

In this case only the action launch will be activated since the actions specified in auto mode will override all other actions.

7.2.3 Pre-defined options: *(-f/-file)*

You can create a file with pre-defined options, and pass this file to *b2Win* device. This file can contain any available option that can be sent in the *b2Win* interface

To be able to send a pre-define file for the *b2Win* interface, it needs to be saved in the ***$BSE/b2Win8/settings/dev*** *directory. (If you wish to place the file somewhere else, you need to use the full path)*

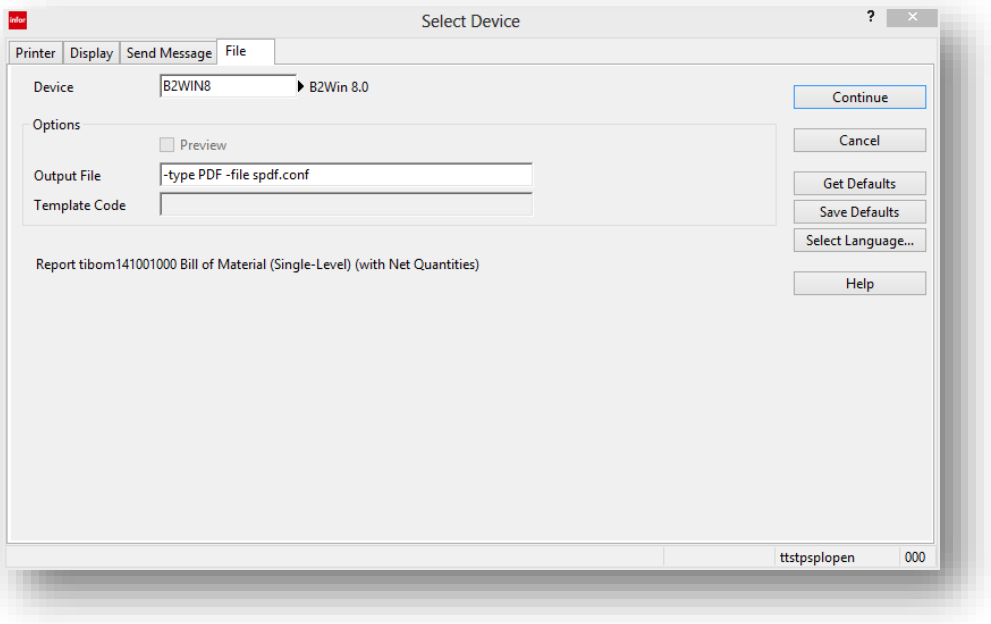
Example:

1) Create file ***spdf.conf*** with these values

```
Logo = Yes
Orientation = P
Format = Graphics
AllowPassword = Yes
PasswordProtected = jamal
```

2) Save File under: ***${BSE}/b2Win8/settings/dev****, with the name* ***spdf.conf***

3) Once *b2Win* is activated with the following options:



b2Win will automatically launch PDF in Acrobat Reader waiting for you to click on the password "jamal" for this file. File is Portrait and has a logo

Configuration File can contain any line from the following properties:

```
Company = <Company name>
Font = <Font size>
Logo = <to include a logo: Yes/No>
Background = <To include a background: Yes/No>
Orientation = <Orientation Portrait or Landscape values: P/L>
Format = <Table/As-is/User-Defined/Graphics>
Configuration = <What Report Customization to use, can specify
configuration saved by another user>
OutputPart1 = b2win_
OutputPart2 = DATE
OutputPart2Format = yyyyMMdd
OutputPart3 = _
OutputPart4 = TIME
OutputPart4Format = hhmmss
OutputPart5 =
OutputPart6 =
OutputPart6Format =
OutputPart7 =
PaperType = <A4/Leter, or any configuration from papertype.ini file>
LaunchMode = <Yes/No>
SendMode = <Yes/No>
ArchiveMode = <Yes/No>
```

```
Sign = <None/All/Last>
SignPositionX = <Number indicates the position X>
SignPositionY = <Number indicates the position Y>
AllowCopy = <Yes/No>
AllowEdit = <Yes/No>
AllowPrint = <Yes/No>
AllowPassword = <Yes/No>
PasswordProtected = <PDF Password>
LineSpacing = <Number indicates line spacing>
VerticalFontScale = <Number indicates Vertical Font scale>
TopMargin = <-1: for default, other number for user defined value>
LeftMargin = <-1: for default, other number for user defined value>
UsePDFPrinter = <Yes/No>
```

Note: A comment can be specified in this file using "|".

Examples of parameter files provided in the package:

1) Configuration that has all settings specified with values: ***all.conf***
2) Configuration that changes PDF specific settings only: ***pdf.conf***
3) Change PDF security settings and adds password for generated PDF: ***spdf.conf***

How to use these examples:

1) Administrator changes values or makes new files (in ***$BSE/nazdaq8/settings/dev***)
2) Administrator creates device with specific setting using "path"
3) If Changed Allowed = Yes, then user can change "output file" while printing to device.

Note: You can't use this option (-f/-file) together with (–u/-user) option

7.2.4 User Pre-defined options: *(-u/-user)*

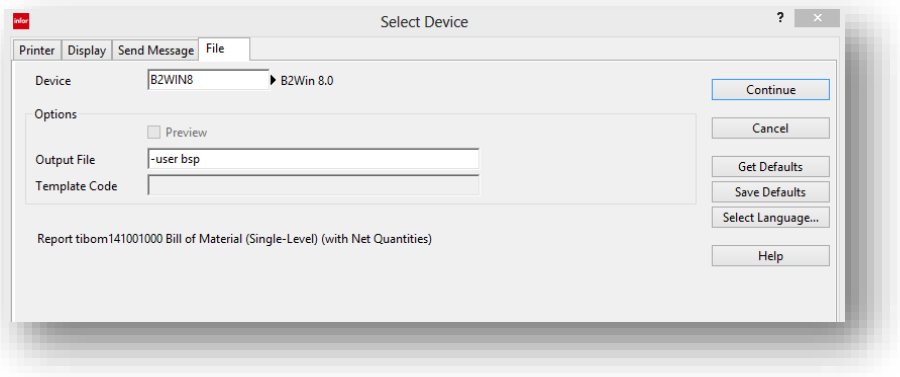
Similar to file option, you can open *b2Win* with your report using somebody else's default settings (all settings, including Customizations)

We can define a power (or dummy) user in Baan for *b2Win* settings and with this user, we can define specific parameters for certain reports - and then use "save defaults". By using the argument –user <userid>, our report will take the settings saved for this report done by <user-id>.
Every Time this particular user changes his/her default settings, every one that is using this parameter will be picking the new parameters.

Note: You can't use this option (-u/-user) together with (–f/-file) option

Example:

1) Login to Baan with user ***bsp***, open a report for printing, and chose the *b2Win* device
2) Change settings; pick logo, Paper Type and margins. Click on ***Save Defaults***
3) User "hiba" logs into Baan. If the device uses the parameter ***-user bsp***



4) *b2Win* will be launched with bsp's defaults. Logo is picked, Paper Type Changed and Margins already set, as "bsp" have defined them for this report.

7.2.5 Use b2Win in manual mode *(-m/-manual)*

If this argument is passed, the *b2Win* device screen will be launched – Otherwise, report will be processed automatically, with no more questions being asked by *b2Win*. By default if *–type* <type> is not specified, the *b2Win* interface will be launched.

Note: we can't use this option with –type option together

7.2.6 b2Email Plus Actions: *(-e/-b2email)*

If you have *b2Email Plus* installed, you can use this argument, and automatically perform actions in *b2Email Plus*

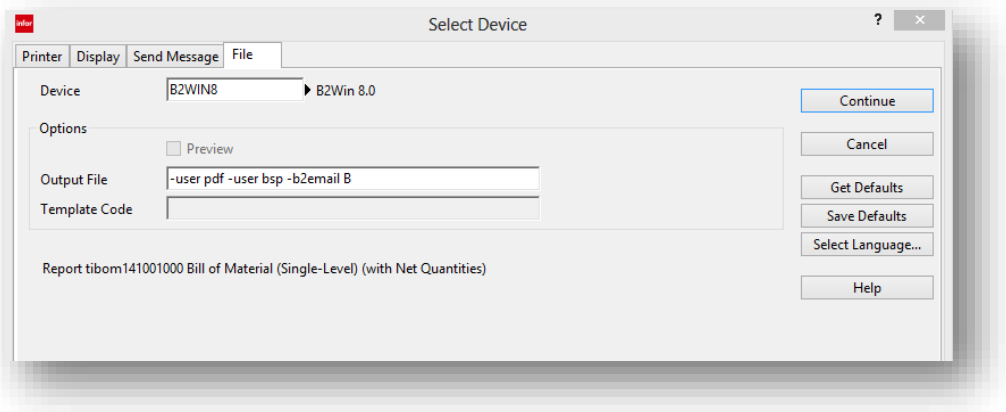
Available Options:

- ***M*** - Mail-Me – The report will be sent to the user defined in *b2Email Plus*
- ***B*** - Mail-Boss - The report will be sent to the user's boss that is defined in *b2Email Plus*
- ***S*** - Send – The report will be sent to the users that are saving in *b2Email Plus*'s defaults
- ***P*** - Print – The report will be printed on the default *b2Email* printer.
- ***D*** - Print Dialog- The report will be printed on the printer that the user will choose from the list of printers

Note*: You need to make sure that "Send" option in the* b2Win *device is chosen*

If you are using *–file <filename>*, variable “Send” needs to be set to Yes
If you chose *–user<userid>* the user should have “Send” option enabled
Otherwise, default settings need to have “Send” enabled

Example:



In this example we convert a report to ***PDF*** format, with all settings of user ***bsp***, and then automatically send the output in PDF format to our manager (“My Boss”).

8 General Information

8.1 Legal Notice and addresses

Warning

If you are unfamiliar with Unix/NT commands or with Baan tools, please contact your Systems Administrator before you proceed with the installation. If you have any questions, please contact us, and we will arrange to have a Technical Support Person assist you in installing *b2Win*.

By installing this demo version, you are licensing this software for an initial thirty (30) day evaluation period only.

To receive a copy of the full ***NAZDAQ*** license agreement, please contact: info@nazdaq-it.com.

Special Requirements

Excel & Word features require Office 2000 and higher. PDF feature requires Acrobat Reader 5.0 and higher

Trademarks

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NAZDAQ

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

Phone +972-4-608-0023
Fax +972-4-647-0112

Our office hours are Monday – Thursday from 10:00 until 19:00 and Fridays from 10:00 until 17:00 (GMT+2)

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