

Omega Print Server - Print Manager Installation & Configuration

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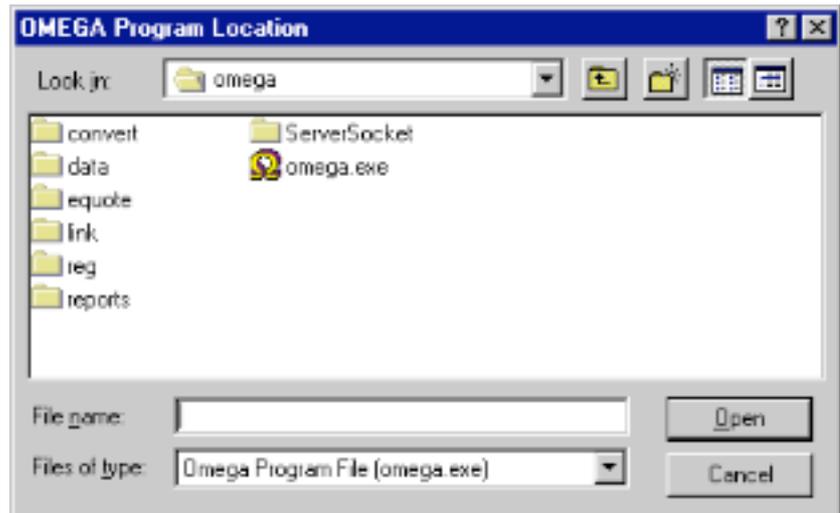
Overview

This document explains the installation and configuration of the print server manager module (PSERVER.EXE), one of the print server modules supplied with Omega. The print manager component is responsible for setting up those reports that are to be made available for printing from within Omega or via scheduling, configuring the form of the report (which printer, which export format) these reports will output and also the times these reports will be output if they are to be handled automatically via scheduling.

The print manager application is usually run from the same machine that the print engine is installed on, although the actual requirement is that the PC running the application must have Crystal Reports 7 or higher installed on it. Since the location of the print engine and corresponding Omega database is stored in the user's registry settings, unless you manually amend the registry settings or log in as different users, it is only possible to manage one print engine from any one particular PC.

Installation

On first running the print manager the location of the Omega database must be specified, so that the application can locate or create the print server files required for operation. If the print engine has already been installed on the same machine then the file browser window used for setting the location should start in the correct directory.

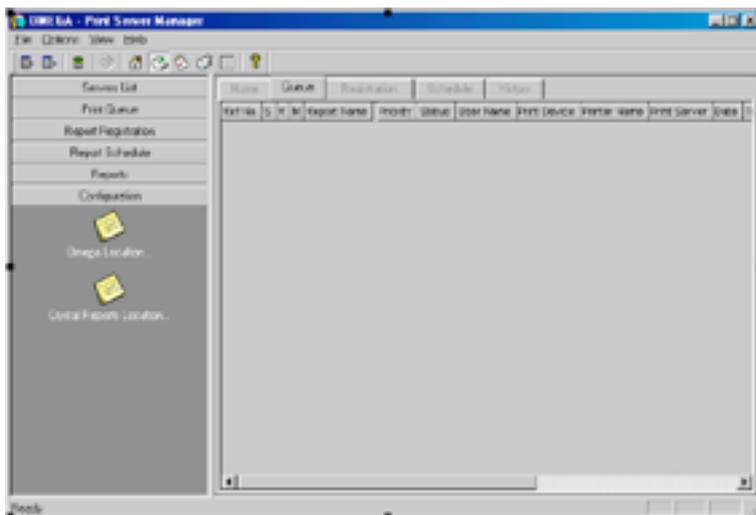


Note:

Currently the print manager (and engine) applications locate the Omega database by using OMEGA.EXE as the file 'filter', i.e. you must select a copy of OMEGA.EXE to indicate that the directory is the correct location of the Omega database. Omega for Windows installations no longer include OMEGA.EXE (the main application was renamed to MDI.EXE) - you will need to create a 'dummy' copy of OMEGA.EXE for a new installation to work.

The next release of the print manager should add MDI.EXE as a selection filter.

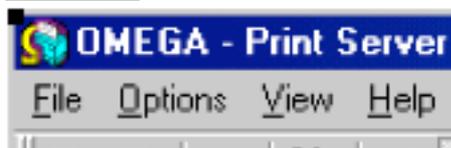
If the installation has been successful then the main print manager window should appear showing an empty print queue window.



Configuration

The print manager window can be split into different sections.

Menus.

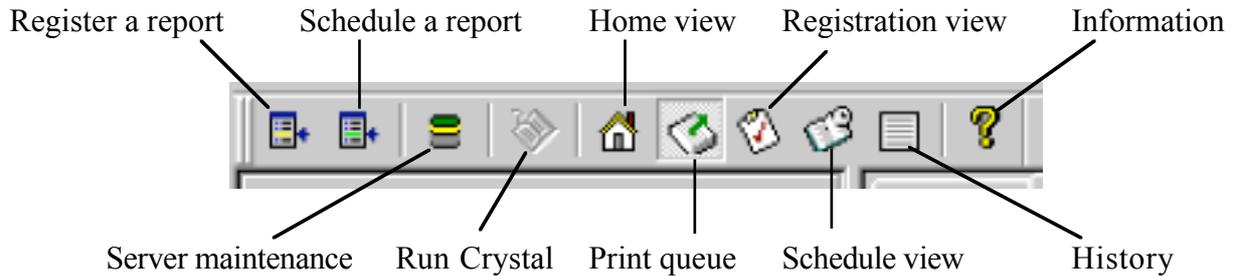


The menu options are as follows:

Menu	Menu Level 2	Menu Level 3	Function
File	Exit		Exit the print manager
Options	Register Report		Register a new report to the print manager
	Schedule Report		Add a registered report to the print schedule for unmanned printing
	Maintenance	Servers	Access server maintenance to allow removing, renaming or replacing server names
	Configuration	Omega Location	Change the location of the Omega application
		Crystal Location	Change the location of the Crystal Reports application
Crystal Reports		Run Crystal Reports	
View	Toolbar		Toggle the toolbar on or off
	Status Bar		Toggle the status bar on or off
	Views	Home	Switch the print manager to the Home page which will stop the automatic refresh of screen data while the print manager is running
		Print Queue	View the print queue form
		Registered Reports	View the registered reports form
		Scheduled Reports	View the scheduled reports form
Print History		Not currently active	

Toolbar.

The toolbar provides quick access to some of the most common print manager functions. It can be hidden using the View → Toolbar menu option.



These options will be covered in more detail while describing the other parts of the print manager GUI.

The 'Drawer' Pane.

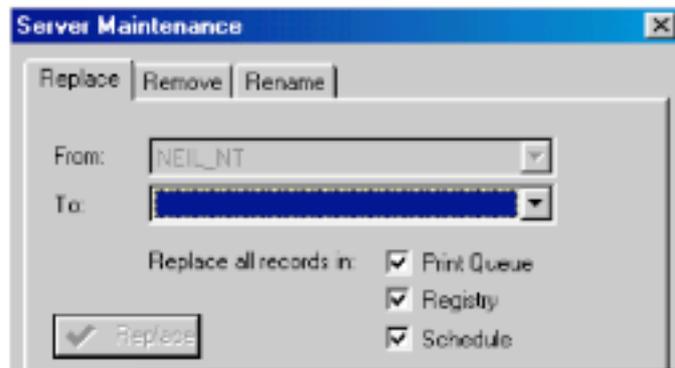


This part of the GUI is similar in functionality to the Microsoft Outlook drawer pane - click on each heading to open the relevant configuration options. Some of the options provide access to the same windows as through the menu or through clicking on the corresponding tag in the main window pane (see next). Some of the less common configuration options are unique to this part of the GUI.

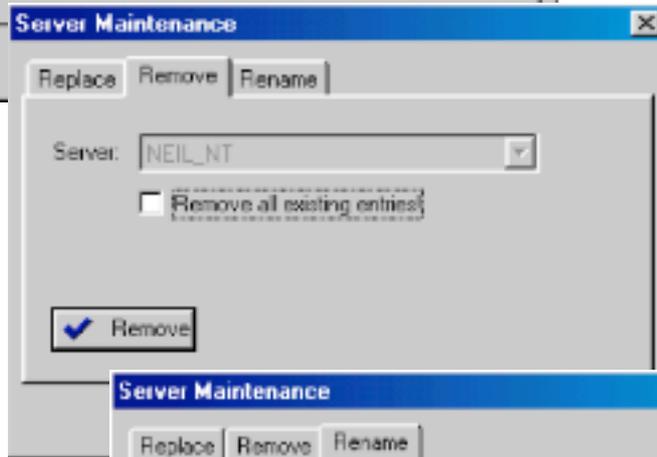
The **Server List** drawer lists all of the print engines that have been created for the local Omega database - the "*" column indicates whether the engine is currently running.

By double-clicking on one of the print engine names you have access to the Server Maintenance dialog window. From here you have the ability to replace (move one print engine's allocated manual and scheduled reports to another engine), remove (including the option to delete all related records) or rename a print engine.

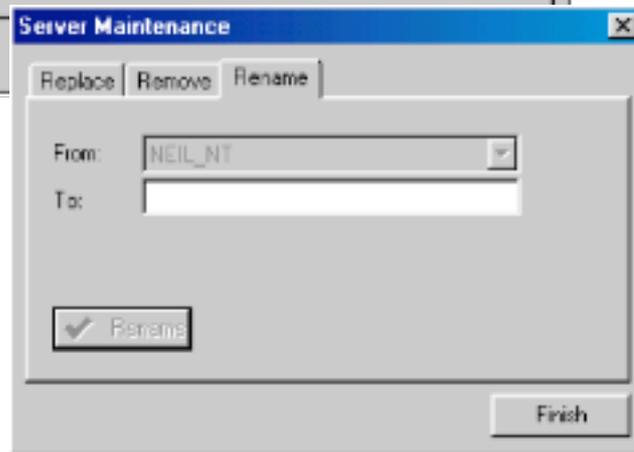
Servers List		Home
Ref.	* Name	Ref No.
1	NEIL_98	
2	NEIL_NT	
3	PRINTSERVER	
4	WIN98	



Report replacing...



...removing...



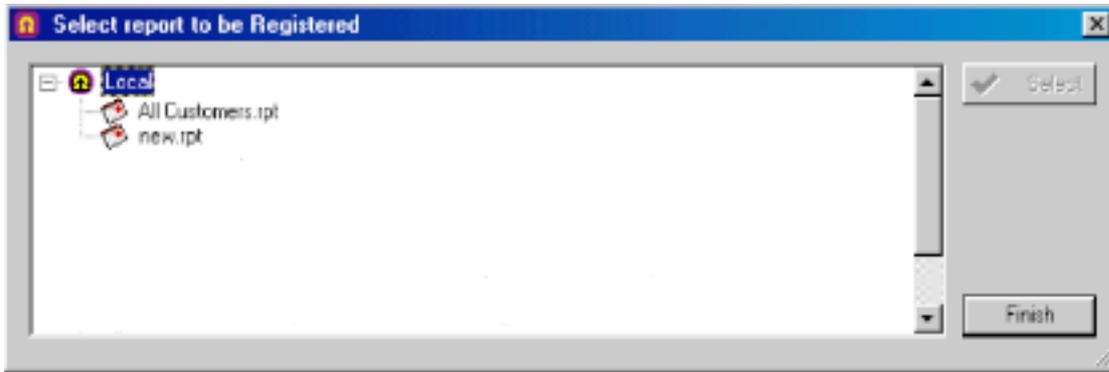
...and renaming.

The **Print Queue** drawer provides access to the print queue, i.e. the same functionality as selecting the print queue tab from the main window pane or the print queue menu and toolbar options.

The **Report Registration** drawer provides access to the list of registered reports through the “View Register” option. Again the same functionality is available elsewhere.

The “Register Reports” option is used to make new reports available to the print server - until this is done the report can only be run manually from the report writing application used to create it, e.g. Crystal Reports. For the reports to be registered they must be placed in the DATA\CONTROL\REPORTS directory.





Register reports dialog window.

The report registration window that appears once you select a report is described in detail in the next section (“The Main Pane”).

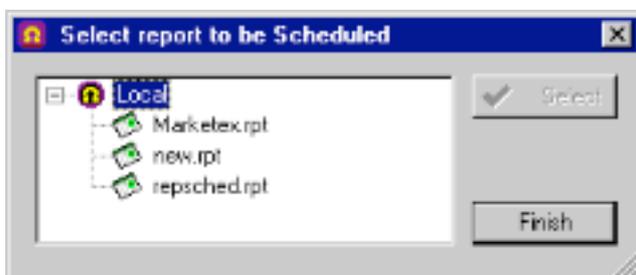
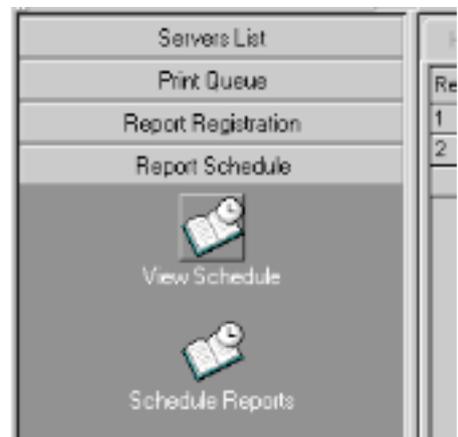
Note:

For a database with a large number of reports it can be useful to separate those reports that are only run manually from those that are only used by the print server or shared between the print server and manual operation. The latter must remain in DATA\CONTROL\REPORTS but manually run reports could be placed anywhere, e.g. DATA\REPORTS.

Reports that are to be registered with the print server must comply to the old DOS filename limitation of 12 characters maximum, which translates to 8 + “.” + 3 character extension, since the reports must also have the “.rpt” extension to be seen by the application.

The **Report Schedule** drawer provides access to the list of scheduled reports through the “View Schedule” option. Again the same functionality is available elsewhere.

The “Schedule Reports” option allows you to select which registered reports are to be set for automatic scheduling, i.e. printing/exporting automatically at set times. When you select this option you will see the list of registered reports that have not yet been scheduled.



Double-click on one of the reports or press the “Select” button to open the schedule configuration window (screenshot on next page).

“Next Print Date” and “Next Print Time” sets the first day and time that the report will print.

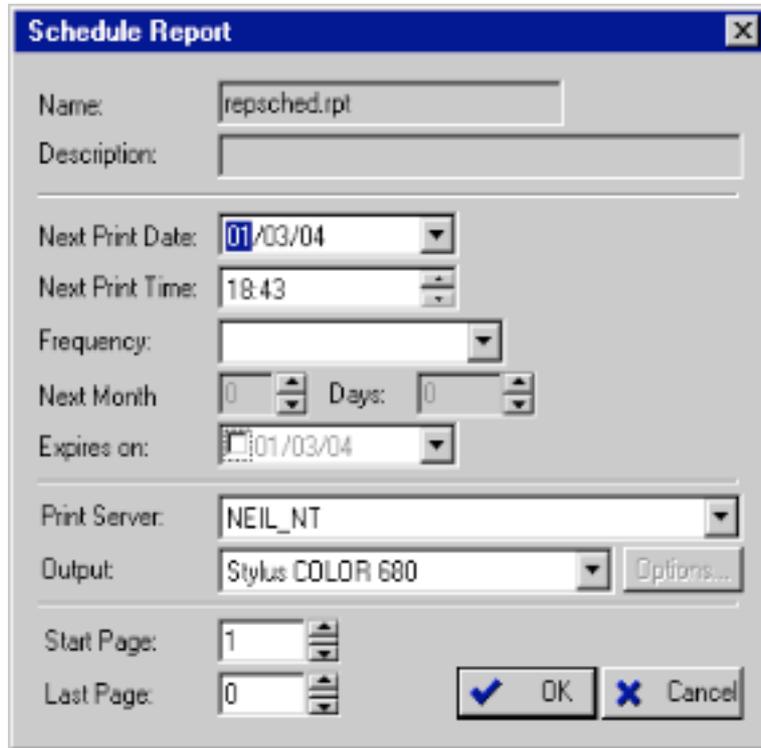
“Frequency” sets how often the print will take place - just once, every working day, every day, one a week, once a fortnight or monthly. The monthly option can be additionally configured to specify which day of the month the print takes place, or the gap between prints in days (0 -

365).

“Expires on” can be used to stop the scheduled printing at a set point in the future.

“Print Server” is used to select which print engine on the local network will be used to handle the report being configured.

“Output” is used to set where the report result of the report will end up - either one of the printers (up to 5 per print engine) connected to the print engine PC, or one of the export formats (see later).



Schedule configuration window.

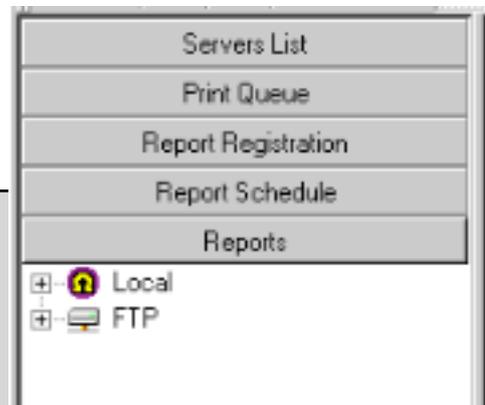
Finally, the dialog allows you to specify which pages are to be printed - the default is to start at page 1 and print the whole document.

The **Reports** drawer gives you direct access to all of the reports in the DATA\CONTROL\REPORT directory and from the Prestim FTP site. By double-clicking on the report you have access to the schedule options as in the Report Schedule drawer (see previously).

Note:

The FTP site access is no longer available since the closure of the Prestim web site (www.prestim.co.uk).

You can only access the report's scheduling information if the reports is in the DATA\CONTROL\REPORT directory - you can also see reports in any subdirectories (e.g. DATA\CONTROL\REPORT\QUOTES) but you cannot configure them.



The **Configuration** drawer gives you access to the same options as the corresponding menu option. “Omega Location” allows you to change the location of the Omega database that the print manager is accessing. The “Crystal Reports Location” is used to tell the print manager where the Crystal executable (CRW32.EXE) is, so that you can run the report designer within the manager. Before you do this the option on the toolbar and in the menu will not be available.



The Main Pane.

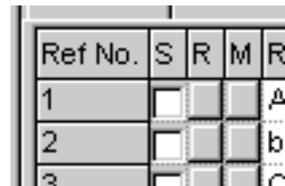
This tabbed GUI element provides direct access to the data stored in the print server database files - it lists the reports that are available for use, scheduled report information and the status of the print queue. It is the part of the print manager that the Omega administrator is most likely to find him/herself using when configuring or troubleshooting the print server.

Click on each tab to cycle through the options.

The **Home** tab is intentionally blank. It should be switched to when running the print manager and not currently using it - it does not try to refresh its view like the other tabbed windows and therefore keeps out of the way of the database engine.

The **Queue** tab displays print requests currently awaiting handling by the print engine they have been assigned to. Print requests sent from the Omega FK7 print window will appear here, as will scheduled reports just before they get handled (the print engine to which a scheduled report is assigned will pick the report up off the schedule queue, place it on the print queue and then check the print queue for reports it needs to handle. Therefore a scheduled report is usually on the print queue for a very short length of time).

The **Registration** tab shows you all of the Omega reports that have been registered for use by a print engine. Following the reference number column, the next three columns provide quick configuration switches. The first column (“S”) can be ticked to suspend a report - it will be frozen on the schedule and print queues and will not be handled by any print engines until this option is switched off. The next column (“R”) is a button to remove the report from being available to the print engine. The third column (“M”) is for modifying the registered report - this is usually done after a report has been newly registered.

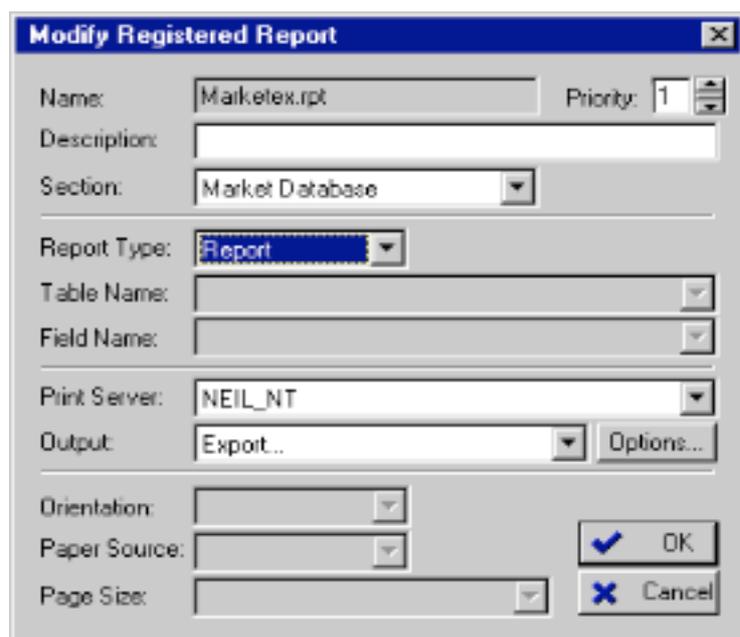


Ref No.	S	R	M	R
1	<input type="checkbox"/>	[button]	[button]	A
2	<input type="checkbox"/>	[button]	[button]	b
3	<input type="checkbox"/>	[button]	[button]	c

Note:

Modifying a report can also be achieved by double-clicking on a report in the main window pane.

The dialog for modifying a report is similar to that for changing a report's scheduling. The “Priority” setting can be used to push a report to the head of the print queue when there are more than one report for a particular print engine waiting to be handled. The “Description” field is for extra user information and not used directly by the print server. The “Section” field helps divide reports up between different departments, but is not used properly yet to truly filter reports when selecting them, for example, in the Omega FK7 print window.



Modify Registered Report

Name: Marketex.rpt Priority: 1

Description: [text field]

Section: Market Database

Report Type: Report

Table Name: [text field]

Field Name: [text field]

Print Server: NEIL_NT

Output: Export... Options...

Orientation: [text field]

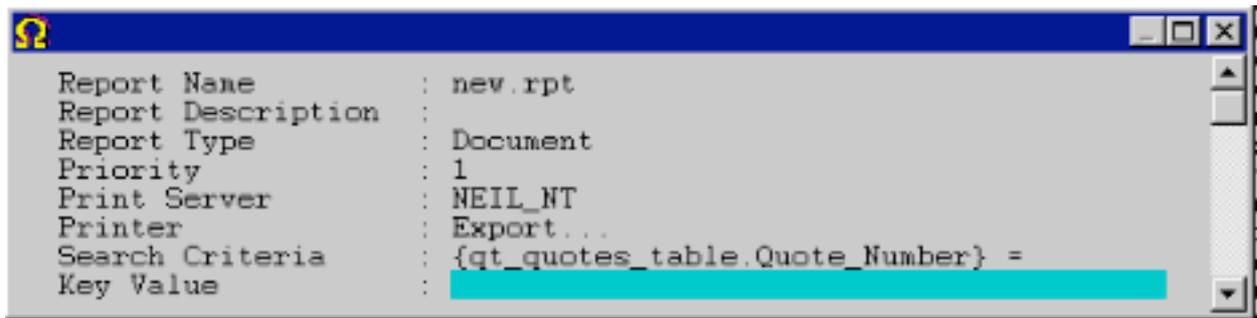
Paper Source: [text field]

Page Size: [text field]

OK Cancel

The “Report Type” can be set to either “Report” or “Document” - the latter applies to reports that take search criteria and opens up the next two fields for input. These allow you to specify a table and a field within that table

that will be used for filtering the report. To use this facility you must be printing from the Omega FK7 print window - from within this window you will see the filter field appear and the filter value can then be specified.



Omega FK7 print window with cursor on line ready to enter quote number search value.

The “Print Server” and “Output” options allow you to configure the destination of the report and the format it will take, be it a printed page or an export format (see later).

Note:
By right-clicking on the Registration main window pane you get a context-sensitive menu that allows you to quickly access the suspend, remove and modify options available in the main window, schedule the report (see earlier) or register a new report (see earlier).

A context menu with five items: Suspend (red circle icon), Remove (red X icon), Modify (green square icon), Schedule... (calendar icon), and Register new report... (calendar icon).

The **Schedule** tab works in a similar fashion to the Registration main window tab - it shows the entire list of scheduled reports and at the start of each row gives you three quick-access options to Ssuspend a scheduled report (stop the report from appearing on the maint print queue at a set time), Remove the report from the schedule list or Modify the scheduled report.

Note:
The suspend and remove options here are not as powerful as in the Registration tab - they only affect the scheduling and do not suspend reports already on the queue or remove them from the registered report list.

Modifying a schedule can also be achieved by double-clicking on the report in the main window pane.

Again, by right-clicking on the Schedule main window pane you get context-sensitive options that allow you to remove or modify a scheduled report, or add a registered report to the schedule list.

A context menu with three items: Remove (red X icon), Modify (green square icon), and Schedule a report... (calendar icon).

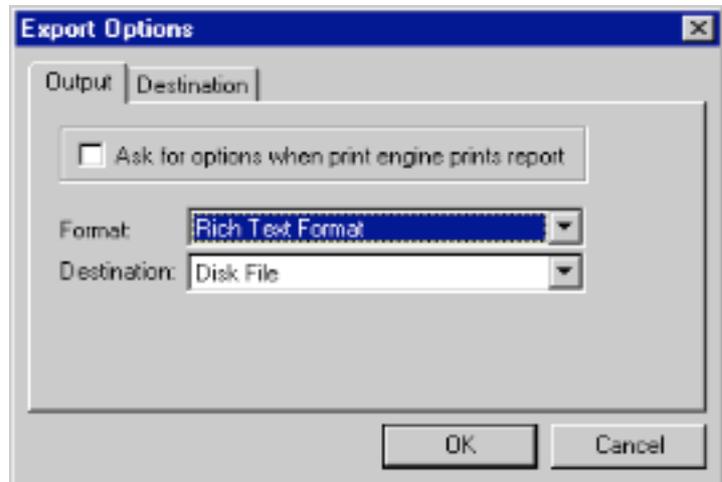
The dialog window for modifying the schedule information is identical to that described earlier in the Report Schedule drawer.

The **History** pane does nothing in the current version of the print manager.

Export Formats.

Both the report and schedule configuration windows allow the print server administrator to amend the format in which the report is output - as a printer output or as an export to disk. The export option formats are based on those formats supported by the Crystal 7 report engine:

- Character-separated values
- Comma-separated values (CSV)
- Crystal Reports (RPT)
- Data Interchange Format (DIF)
- Excel 2.1 (XLS)
- Excel 3.0 (XLS)
- Excel 4.0 (XLS)
- Excel 5.0 (XLS)
- Excel 5.0 (XLS) Tabular
- HTML 2.0 (MS Explorer 2.0)
- HTML 2.0 (Netscape 2.0)
- HTML 3.0 (Draft Standard)
- HTML 3.2 (Extended)
- HTML 3.2 (Standard)
- Lotus 1-2-3 (WK1)
- Lotus 1-2-3 (WK3)
- Lotus 1-2-3 (WKS)
- ODBC
- Paginated Text
- Record Style (Columns of values)
- Reports Definition
- Rich Text Format
- Tab-separated text
- Tab-separated values
- Text
- Word for Windows 2.0 Document



The export destination is currently always to a file and the default location of the file is the Omega 'root' directory, i.e. the directory that the print manager was given when it was first installed, containing the OMEGA.EXE file. The default name of the exported file is the same as the report, but with an extension based on the export format.

Some of the export options offer extra configuration tabs to customize the output - this may also depend on the version of the Crystal Reports engine that is installed.