eForms Express 3.0® (Enterprise) Administration Guide

🔍 eForms Express 3.0 (Enterprise)	
<u>File D</u> epartments <u>P</u> rinters <u>H</u> elp	
Index Information Administration	
Search Results Search EFE	
Employee ID: 12345	Forms: Select All Beneficiary Designation
Cost Center: 444777	Request for Dependent Coverage
First Name: Sheldon	
Middle Name: Will	
Last Name: Downs	
SSN: 555226666	
DOB: 12/22/1980 🗸	
Test Record Search Clear Print	
Printer: Default	Dept: Human Resources



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Security

eForms Express utilizes its own user and admin security as well as using NTLM sign-on ability. The NTLM logon setting allows the user to have single sign on capability.

There are three types of users.

Standard User	Look-Up and Print (Only departments that have been assigned.)
Department Admin- Allows user to administer there assigned department.	Administer Auto-fill (Department Level) create forms (Department Level) Add forms (from global list) Create form groups (from global and department list) Add Printer (Department Only) Add users (Department Level)
System Admin- Full Control	Create Forms (Global Level) Create Form Groups (Global Level) Create Departments Add Printer (Department Level) Create Users Add eForms Express Index Fields

1.1 Creating a user (Global Level)

Step 1



Sign into eForms Express using System Admin credentials.



Step 2

Select the **Administration tab**>user tab.

🖲 eForms	s Expres	ss 3.0 (Enterp	orise)			
<u>File</u> <u>D</u> epart	tments	Printers <u>H</u> elp				
Index Inform	mation	Administration				
Departmen	ts Form	s Form Groups	Log	Users	Index Field Definitions	
Last Nan	ne li	First Name	User ID		Security	Netw 🔺
▶ downs		sheldon	SDOWNS	;	System Admin	
Fason		Patricia	PFASON		Standard User	
Hancock		Nicki	NHANCO	CK	System Admin	1
Hatch		Lisa	LHATCH		System Admin	
Hime		Judy	JHIME		Standard User	~
						>
First Name:	sheldon		Las	t Name:	downs	
User ID:	SDOWNS	S Secur	rity: Syst	em Admin	Windows Au	uth.
Password:			Co	onfirm:		
			(New	Edit Save Cance	Delete
					Dept: Huma	n Resources

New	Create New User
Edit	Select current user in list box and then select edit.
Save	Save current setting of user after edit or newly created user
Delete	Select current user in list box and then select delete. (After deletion you cannot restore user.)
Security Drop Down	Standard User Dept. Admin System Admin
Windows Auth. – User ID must match window ID.	Allows for the authenticated user signed on to bypass eForms log-on.

1.2 Adding a user (Department Level)

Note: You must have either Dept. Admin or System Admin level security to add a user to a department.

Step 1: Sign-on into eForms Express 3.0 using Dept. Admin or System Admin privileges.



Step 2: Select Administration>Departments tabs.

🖲 eForms Express 3.0 (En	nterprise)	\mathbf{X}
<u>File D</u> epartments <u>P</u> rinters <u>H</u> e	lelp	
Index Information Administratio	ion	
Departments Forms Form Gr	roups Log Users Index Field Definitions	
Employee Health Human Resources	Description:	
	<u>N</u> ew <u>E</u> dit <u>D</u> ele	te
	Dept: Human Resou	urces

Select the department that the new user will be added to and select edit.

Step 3:

Select the **Users** Tab.

C Departme	nt - Employee	Health					
Department P	rinter						
Preferences A	Auto Fill Forms	Form Groups G	ilobal Fo	rm Selection	Printers	Users	
	Availab	le Users:	_	Sele	ected User	S:	
	Fason, Patricia Hime, Judy Huckaby, Benji Jones, Vickie Plank, Paula		• •	Mouse, Mick	.ey		
						🖉 Save	🗶 Cancel

Select the user from the available list and then select the right arrow to add.

Note: Shift >Mouse click and Control> Mouse click will work when adding multiple users.



1.3 Changing passwords

eForms Express 3.0 allows the user to change their personal password.

File>Change Password

Change Pass	word
User Name:	MMOUSE
Old Password:	
New Password:	
Confirm:	
	OK X Cancel

Note: Old password is required to change.



Administration (Global)

eForm Express global administration is found under the administration tab. All sub tabs are seen if the user logs-in as a System Admin:

🖲 eForms Express 3.0 (E	nterprise)
<u>File Departments Printers H</u>	lelp
Index Information Administrat	ion
Departments Forms Form G	roups Log Users Index Field Definitions
Employee Health Human Resources	Description:
	New Edit Delete
	Dept: Human Resources

Department	This section would be used to create a department.
Forms	This section would be used to create a global form.
Form Groups	This section would be used to create global forms group.
Log	All users can see this tab
Users	This section is used to create all users.
Index field definitions	This section is used to create data base fields within the eForms Express data base.



2.1 Creating a Department

Log into eForms Express with System Admin credentials:

eForms Express 3.0 (Enterpr	ise) 🗖 🗖 🔀
<u>File Departments Printers H</u> elp	
Index Information Administration	
Departments Forms Form Groups	Log Users Index Field Definitions
Employee Health Human Resources	tion:
	New Edit Delete
	Dept: Human Resources

Select the Departments tab>New.



The following window will open.

🖲 Department	X
Department Printer	
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users	
Department Name: This is my new department	
Description: Search On: Tab Key Press	
Save X Car	ncel

Enter the department name and then click save.

Note: For further information see Administration (Department).



2.2 Creating Forms (Global)

The forms tab found under the administration tab allow for the creation of global forms. Global forms are allowed to be seen in all departments.

There are three methods of forms:

EFE Report Builder Form	This is the server based forms creator
EFE Form Call Builder (Prescribe)	This allows you to map eForms Index values to X-Y coordinates to a printer resident form.
Manually Coded Form Builder (Prescribe)	This will provide generic prescribe code (Advance mode)

Log into eForms Express with System Admin credentials:

eForms Express 3.0 (Enterpr	⊤ise)		
<u>File Departments</u> Printers <u>H</u> elp			
Index Information Administration			
Departments Forms Form Groups	Log Users In	dex Field Definitions	
Form Name	Туре	Category Visible	^
			=
			~
N () N		New Edit	<u>D</u> elete
		Dept: Human F	Resources

Select Administration>Forms Tab. Select New, Edit or Delete.

For further information on forms creation, see Forms Creation Guide.



2.3 Creating Forms Groups (Global)

The Forms Group tab found under the administration tab, allows for the creation of global group forms. Global Group Forms are allowed to be seen in all departments.

Form groups allow you to group individual forms and print them as one form set.

Log into eForms Express with System Admin credentials:

🧐 eForms Express 3.0 (Enterprise)	
<u>File D</u> epartments <u>P</u> rinters <u>H</u> elp	
Index Information Administration	
Departments Forms Form Groups Log	Users Index Field Definitions
Group Name	
	v
N A N	New Edit Delete
	Dept: Human Resources

Select Administration>Form Group Tab. Select New.



The Form selector box will open. Highlight the required forms and click the right arrow to add or the left arrow to remove. Then click "OK".

🖲 Form Group Editor		
Group Name: Application		
Available Forms: Application Page 2]	Selected Forms: Application Page 1
	Ð	
	•	
		🗸 OK 🗶 Cancel

Note: Shift >Mouse click and Control> Mouse click will work when adding multiple forms.

The Global Form group will now be seen under the **department>global form selector** tab.



2.4 Index Field Definitions

The Index Field Definition tab contains the global index fields that are the column names found inside the eForms Express Database. All collected data is in each departments is stored under these values.

Four types of fields can be created:

Text	Integer
Date	List

eForms Express 3.0 (Enterprise) comes with 5 fields. Additional fields may be purchased.

🔍 eForms Express 3.0 (Enterprise)				
<u>File D</u> epartments <u>P</u> rinters <u>H</u> elp				
Index Inf	formation Administrati	on		
Departm	nents Forms Form G	roups Log Users I	Index Field Definition	s
Active	e Field Name	Display Name	IF_Type	Examp 🔨
	CHARTNBR	Chart #	Text	12345
	ANUMB	Account #	Text	44477: 🔤
	FIRSTNAME	First Name	Text	Sheldo
	MNAME	Middle Name	Text	Will
	LASTNAME	Last Name	Text	Downs
	SSNBR	SSN	Text	555226
	DOB	DOB	Date/Time	12/22/
	DOS	DOS	Date/Time	09/01/
	Field 1	Field1 Text		BC-BS
Reorder Fields				
Printer: De	efault		Dept: Hum	nan Resources



You can select the required field and then click edit.

Index Field Def	inition			
$\boxtimes \triangleleft \blacktriangleright \blacksquare$				
Field Name	CHARTNBR			
Display Name	Chart #			
Example / Test Value	12345			
Field Type	Text	~		
Form Code	NCN			
Active				
Manual				
Search				
			<u>0</u> K	Cancel

Field Name	This is the column name inside the eForms Express Database. No spaces allowed.
Display Name	This the friendly name that will be displayed.
Example / Test Value	This will provide sample data when a look- up DB is not available.
Field Type	Text or Date (SQL field definition)
Form Code	This is what is used when mapping data to a printer resident form. It is not used for the server based forms.
Active	Turn on or off the field.
Manual	Allows the user to manually fill the field.
Search	Allow this field to be the search parameter for the target Database.



Administration (Department)

eForms Express allow you to create departments that will utilize its own specific Database Query, Forms, Form Groups, Users and Printers. As well as selecting global forms, form groups and printers.

3.1 Editing a Department

Log into eForms Express with System Admin or Dept. Admin credentials:

eForms Express 3.0 (Er	terprise)	
<u>File D</u> epartments <u>P</u> rinters <u>H</u>	≥lp	
Index Information Administrati	n	
Departments Forms Form G	oups Log Users Index Fiel	d Definitions
Employee Health	Description:	
Human Resources		
		ew Edit Delete
Printer: Default		Dept: Human Resources

Select a department and click "Edit".



The department edit window will open.

🖲 Department - Employee Health
Department Printer
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users
Department Name: Employee Health
Description:
Search Un: Tab Key Press
Prefix: EHS Suffix: O Dept. Admins
System Admins
Confirm Print
Disable Printer Search
Import Dates as 2-digit Year
Reset form selection after each print
Store form selection between eForms Express sessions
Require Auto Fill search to print
Save 🔀 Cancel

Preferences	Settings are used to enable key functions.
Auto Fill	External DB connections and Query or created.
Forms	Department level forms are created.
Form Groups	Department level form groups are created.
Global Form Selection	Global forms or global form groups are selected.
Printers	Department level printers are created.
Users	Users are added to the department.

3.2 Preferences Tab

🔍 Department - Employee Health
Department Printer
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users
Department Name: Employee Health
Description:
Search On: Tab Key Press ID Barcode Prefix: EHS Suffix: Suffi
Disable Printer Search
Import Dates as 2-digit Year
Reset form selection after each print
Store form selection between eForms Express sessions
Require Auto Fill search to print
Save Save

Department Name	Display name of department.
Description	Unique description of department.
Search On	How the user will evoke a search.
Allow Reprint	What type of user will be allowed to reprint Forms.
ID Barcode Prefix and Suffix	Will append or prepend a unique value to the ID barcode.
Confirm Print	Prompt the user before printing.
Disable Printer Search	Will confirm the target printer is found prior to printing.



Import dates as a 2-digit year	Sometime used when a date field is a text field and stored as a two digit year.
Reset Form Selection after each print	Clears form selector after print
Store forms selection between sessions	Holds currently selected forms when application is closed.
Require Auto-Fill search to print	A valid search must be performed prior to print.

3.3 Auto Fill Tab

🖲 Department - Employee Health 🛛 🔲 🗖 🔀
Department Printer
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users
Connections Field Links Field Mapping / Settings
Name Master Required Navigator
Name: Navigator Required Connection String Query New Edit Save Cancel Delete
Save 🔀 Cancel

The Auto Fill tab provides the connection wizards to connect to external databases.



3.3.1	Creating	a new	DB	connection
-------	----------	-------	----	------------

Department - Employee Health		
Department Printer		
Preferences Auto Fill Forms Form Groups Global	Form Selection Printers Users	
Connections Field Links Field Mapping / Settings		
Name Navigator	Master Required	
Name: My New DB Connection	Required New Edit Save Car	ncel Delete
	Save	🗙 Cancel

Go to the Auto Fill tab under the department tab. Select new and enter your name of your connection. Click the "Connection String" Button.

A new window will open:

frmDepartment_1.qryAuto_Fill ConnectionString	
C Source of Connection	
O Use Data Link File	
	Browse
Use Connection String	
tial Catalog=eForms30;Data Source=BBDS_SD\eFormsExpress,1501	Build
OK Cancel	

You can manually enter your DB connection string or click "Build..." to use the connection wizard.



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3.3.2 DB Connection Wizard

After clicking the "Build" button, the data link properties>Provider window will appear:

평 Data Link Properties	×
Provider Connection Advanced All	
Select the data you want to connect to:	
OLE DB Provider(s)	^
Microsoft Jet 4.0 OLE DB Provider Microsoft Office 12.0 Access Database Engine OLE DB Pro Microsoft OLE DB Provider for Analysis Services 9.0 Microsoft OLE DB Provider For Data Mining Services Microsoft OLE DB Provider for DTS Packages Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for OLAP Services 8.0 Microsoft OLE DB Provider for Oracle Microsoft OLE DB Provider for Search Microsoft OLE DB Provider for SQL Server	HILE CONTRACTOR
Microsoft OLE DB Simple Provider MSDataShape OLE DB Provider for Microsoft Directory Services SQL Native Client	~
<u>N</u> ext >>	
OK Cancel Hel	p

Select your OLE DB provider(s). Then click "Next".



The connection tab window will appear:

평 Data Link Properties 🛛 🛛 🔀			
Provider Connection Advanced All			
Specify the following to connect to SQL Server data: 1. Select or enter a server name: BBDS_SD\eFormsExpress_1501 2. Enter information to log on to the server:			
 Use <u>Windows NT Integrated security</u> <u>U</u>se a specific user name and password: 			
User <u>n</u> ame: eFormsDemoDataUser <u>P</u> assword: <u>B</u> lank password <u>I</u> Allow <u>s</u> aving password 3. Select the <u>d</u> atabase on the server:			
eForms30			
Attach a database file as a database name: eForms30			
Using the filename:			
OK Cancel Help			

Input all required information and then click test connection.

If all required information is correct your will receive a successful validation prompt.

Microso	ft Data Link	×
(į)	Test connection succe	eded.
	ОК	

Click "OK">"OK".



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You will now be back at the Department>Auto Fill window	, select the Query button.
---	----------------------------

Contract - Employee Health		
Department Printer		
Preferences Auto Fill Forms Form Groups Global F	orm Selection Printers Users	
Connections Field Links Field Mapping / Settings		
Name Navigator I My New DB Connection	Master Required	
Name: My New DB Connection	Required	
	New Edit Save Cance	Cancel

The Query Builder wizard will appear:

eForms Express Query Builder []	
🗅 🖆 🗄 😡 😡 🔪 🖉 🖳 🗸 🗙	
	DemoData
Columns SQL Results	
Field Table Show Sort Function Group Alias	

On the right side you will see all available tables.



ë eForms Express Query Builder []								
	3 🐺	5	SOL 😼 🛙	<u>b</u> 🗸	×			
DemoData RowID ChattNbr FirstName LastName SSNbr DateOfBirth DateOfService MiddleName SEX ACCOUNT								
Field	ChartNbr	FirstName	LastName	SSNbr	DateOfBirth			
Table	DemoData	DemoData	DemoData	DemoData	DemoData			
Show	Show	Show	Show	Show	Show			
Sort								
Function								
Alias			5					
Filds								

Click and hold the desired table and drag to the grey pane on the left side.

All available columns will appear. Select all required columns and they will begin to appear on the bottom of the window.



eForms Express Query Builder []	
Image: Solution of the second seco	CemoData
Columns SQL Results	
chartnbr	firstname 🔼
111	John
222	Steven
333	Larry
	>

Select the results tab and all data rows will be returned:

Then select the green check button at the top of the window to close and save.



3.3.3 Field Mapping

Go to Department>Auto Fill>Field Mapping/Setting

© Department - Employee Health									×
<u>D</u> epartment	<u>P</u> rinter								
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users									
Connections	Field Link	ks Fie	eld Mapping / Setti	ngs					
Inde	ex Field		Auto Fill	Field	Visible	Required	Search	Manual	
Employee ID			My New DB Conr	nection.CH/ 🔽					^
Cost Center			I	~					
First Name				~					
Middle Name	é		[~					-
Last Name				~	✓				
SSN				~					
DOB				~					
DOS				~					
Insurance				~					
Sex			[~					~
L							Save	🗙 Can	cel

Select from the drop down list the columns you wish to map to the eForms Express database. Insure you mark the fields the required settings:

Visible	Will allow the field to be seen in the eForms Application.
Required	Printing will not be allowed if field is not returned from the external DB.
Search	This is the search field for the external DB. The operator will manually insert look-up data to perform the search on the external DB.
Manual	This will allow the user to manually enter data.

Click the "Save" button to save your selections.

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3.4 Creating Forms (Department)

Departmental forms may only be seen by users that are part of that forms department. If a form requires to be seen by all departments then it should be created as a global form.

EFE Report Builder Form	This is the server based forms creator
EFE Form Call Builder (Prescribe)	This allows you to map eForms Index values to X-Y coordinates to a printer resident form.
Manually Coded Form Builder (Prescribe)	This will provide generic prescribe code (Advance mode)

Log into eForms Express with System Admin or Dept Admin credentials:

🔍 Department - Employee Health								
Department Printer								
Preferences Auto Fill Forms	Form Groups	Global Form Selection	Printers Users	5				
Form Name	TJ	ре	(1	Category	Visible	^		
ADT	EH	HS Immunization Forms		SRV	V			
Annual Health Update	Eł	HS Assessment		SRV				
Influenza Vaccine	Eł	HS Immunization Forms		SRV				
Influenza Vaccine-2	Eł	HS Immunization Forms		SRV				
MMB1	EH	HS Immunization Forms	:	SRV				
MMR2	Eł	HS Immunization Forms		SRV				
TB Screening Questionaire	Eł	HS Screenings Forms		SRV				
TB Skin Test	EF	HS Screenings Forms		SRV				
						*		
		[M] [M]	Ne	w <u>E</u> di	t <u>D</u> e	lete		
			🗸 S	ave	🗙 Can	cel		

Select Administration>Departments Tab. Select New or Edit. Once the department window opens select the Forms tab.



3.4 Creating Forms Groups (Department)

The Forms Group tab found under the department tab, allows for the creation of departmental grouped forms. Department Group Forms are allowed to be seen in only its department.

Form groups allow you to group individual forms and print them as one form set.

Log into eForms Express with System Admin credentials:

Department - Employee Health	
Department Printer	
Preferences Auto Fill Forms Form Groups Global Form Selection Printers Users	
Group Name	^
1. All Employees	
2. Shots	
MMR	
	~
	<u>E</u> dit <u>D</u> elete
Save	🗶 Cancel

Select Administration>Departments Tab. Select New or Edit. Once the department window opens select the Form Group tab.



The form selector box will open. Highlight the required forms and click the right arrow to add or the left arrow to remove. Then click "OK".

Sorm Group Editor		
Group Name: 1. All Employees		
Available Forms:	1	Selected Forms:
MMR1 MMR2	• •	Annual Health Update Influenza Vaccine Influenza Vaccine-2 TB Screening Questionaire TB Skin Test
1		V OK X Cancel

Note: Shift >Mouse click and Control> Mouse click will work when adding multiple forms.



3.5 Global Forms Selection (Department)

Departments will not be able to see global forms until they are added to the required department.

C Departme	nt - Employ	ee Health						
<u>D</u> epartment P	rinter							
Preferences A	Auto Fill Form	s Form Groups	Global For	m Selection	Printers	Users		
	Ava	ilable Forms:		Selected Forms:				
	Application							
						🖉 Save	e 🗶 Cancel	

Note: Shift >Mouse click and Control> Mouse click will work when adding multiple forms.



3.6 Adding a Printer (Department)

You may only add a printer at the department level. You may add several built in printers that are predefined when you load eForms Express or you may add windows based printer at the client level.

Screen Printer	The Screen printer will allow the user to screen print the required forms. Once performed you can then bundle as an email
Default Printer	This printer will allow eForms Express to use the default printer on the clients PC.
LPR	You can set up a direct LPR printer. IP address is required
Import Local Printer	Import local printers on the client PC. This PC will be seen by the entire department.

Department - Employee	Health			
<u>D</u> epartment <u>P</u> rinter				
Preferences Auto Fill Forms	Form Groups 🛛 Glob	al Form Selection	Printers Users	
Name	IP Address	Print From Server	URL	^
▶ Default				
Screen				
				=
				~
<				>
Name: Default			IP Address:	
Descr.			Prin	nt From Server
[Import Local Printer(s)]		H	New Save C	ancel Delete
			Save	🗙 Cancel



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3.7 Adding Users (Department)

You must add users to the specific department:

Sign-In ad a System or Dept Admin:

C Departm	ent - Employe	e Health					
<u>D</u> epartment	<u>P</u> rinter						
Preferences	Auto Fill Forms	Form Groups	Global Fo	rm Selection	Printers	Users	
	Availat	ble Users:		Sele	ected Use	rs:	
	Fason, Patricia Hime, Judy Huckaby, Benji Jones, Vickie Plank, Paula		Image: Control of the second	Mouse, Mick	ey		
						🖉 Save	Cancel

Select the department and click edit. The department Administration window opens>Click User.

Select form the available user list and use the left arrow to add.

