

# eForms Express 3.0<sup>®</sup> (Enterprise)

## Administration Guide

eForms Express 3.0 (Enterprise)

File Departments Printers Help

Index Information Administration

Search Results Search EFE

**Employee ID:** 12345

Cost Center: 444777

First Name: Sheldon

Middle Name: Will

Last Name: Downs

SSN: 555226666

DOB: 12/22/1980

Forms: [Select All](#)

- Beneficiary Designation
- Enrollment-Change
- Request for Dependent Coverage

Test Record Search Clear Print

Printer: Default Dept: Human Resources

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## Security

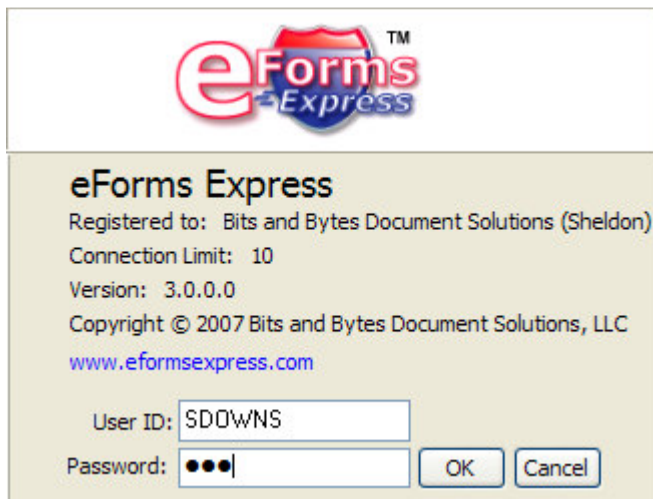
eForms Express utilizes its own user and admin security as well as using NTLM sign-on ability. The NTLM logon setting allows the user to have single sign on capability.

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



**eForms Express**  
Registered to: Bits and Bytes Document Solutions (Sheldon)  
Connection Limit: 10  
Version: 3.0.0.0  
Copyright © 2007 Bits and Bytes Document Solutions, LLC  
[www.eformsexpress.com](http://www.eformsexpress.com)

User ID:

Password:

Sign into eForms Express using System Admin credentials.

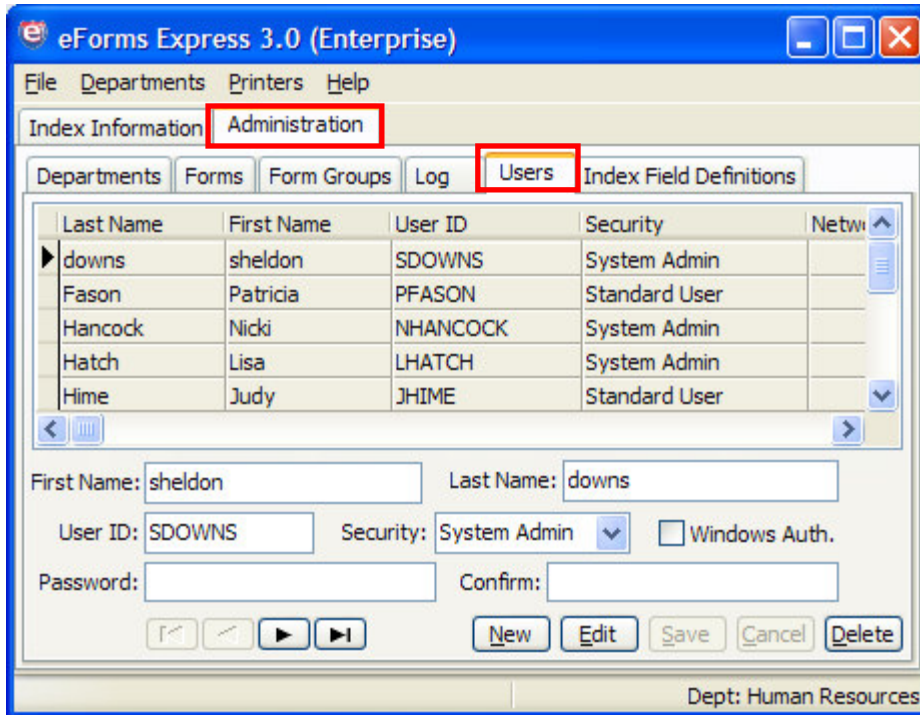
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Step 2

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

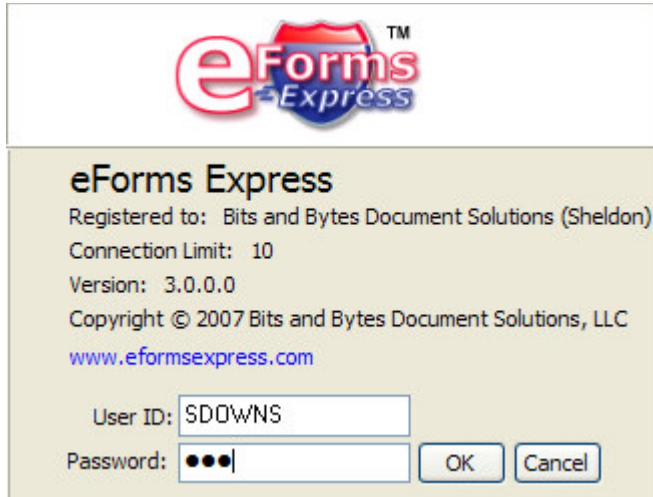


New	Create New User
Edit	Select current user in list box and then select edit.
Save	Save current setting of user after edit or newly created user
Delete	Select current user in list box and then select delete. (After deletion you cannot restore user.)
Security Drop Down	Standard User Dept. Admin System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

## 1.2 Adding a user (Department Level)

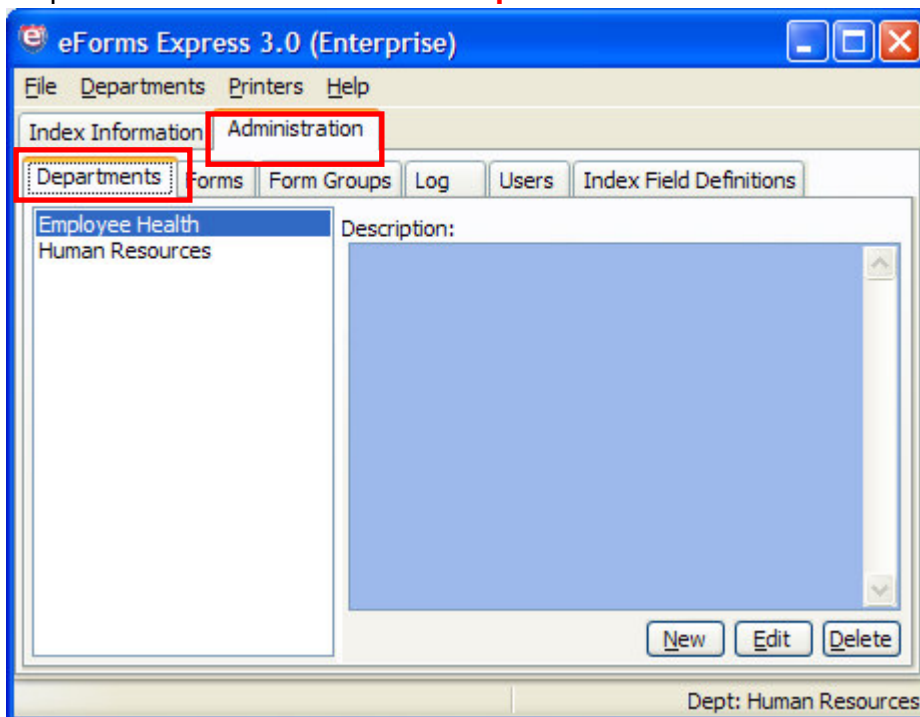
**Note:** You must have either Dept. Admin or System Admin level security to add a user to a department.

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



The image shows a login dialog box for eForms Express. At the top is the eForms Express logo. Below it, the text reads: "eForms Express", "Registered to: Bits and Bytes Document Solutions (Sheldon)", "Connection Limit: 10", "Version: 3.0.0.0", "Copyright © 2007 Bits and Bytes Document Solutions, LLC", and "www.eformsexpress.com". There are two input fields: "User ID:" with the text "SDOWNS" and "Password:" with three dots. To the right of the password field are "OK" and "Cancel" buttons.

Step 2: Select **Administration**>**Departments** tabs.



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

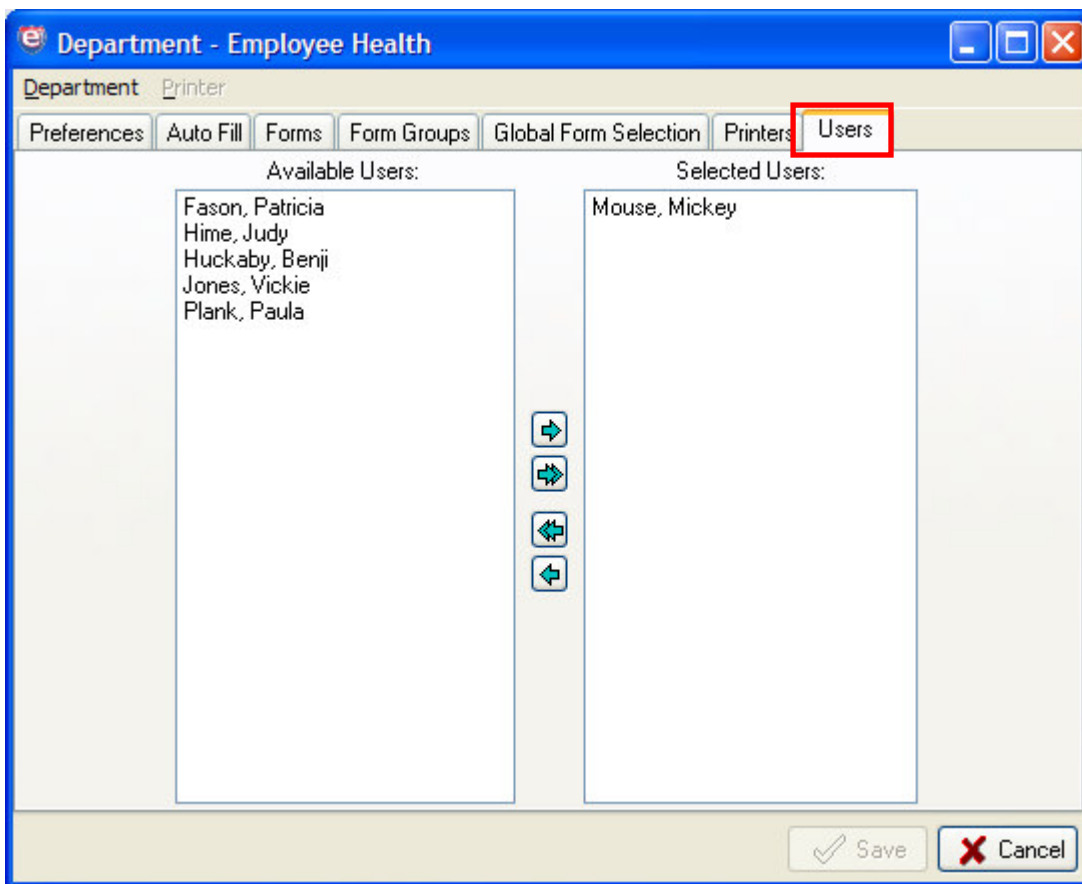
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Step 3:

Select the **Users** Tab.



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

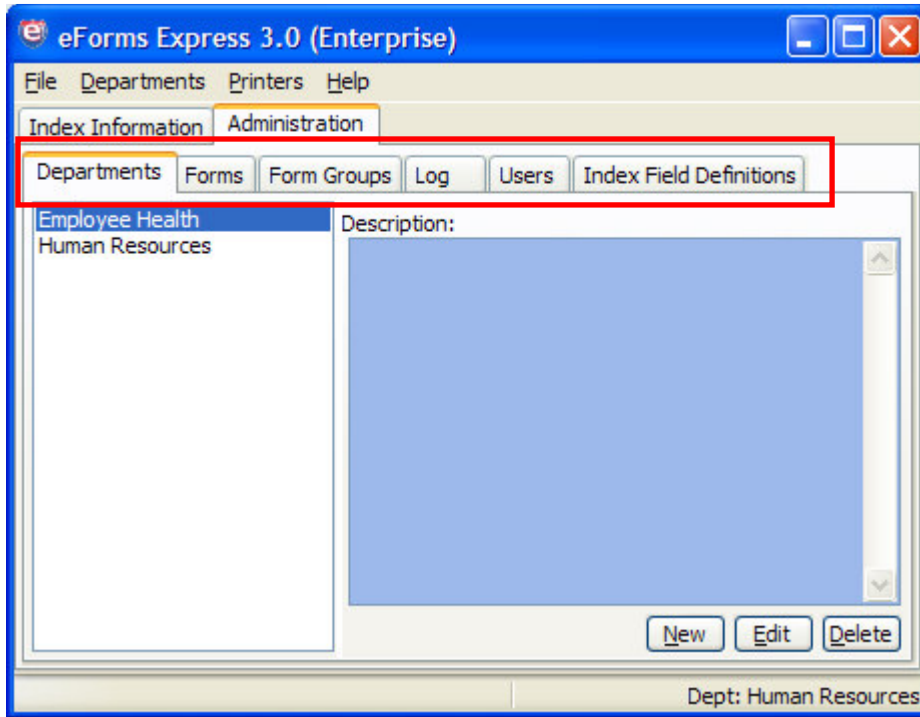


The image shows a 'Change Password' dialog box with a blue title bar. It contains four text input fields: 'User Name' (pre-filled with 'MMOUSE'), 'Old Password', 'New Password', and 'Confirm'. At the bottom, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

**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:

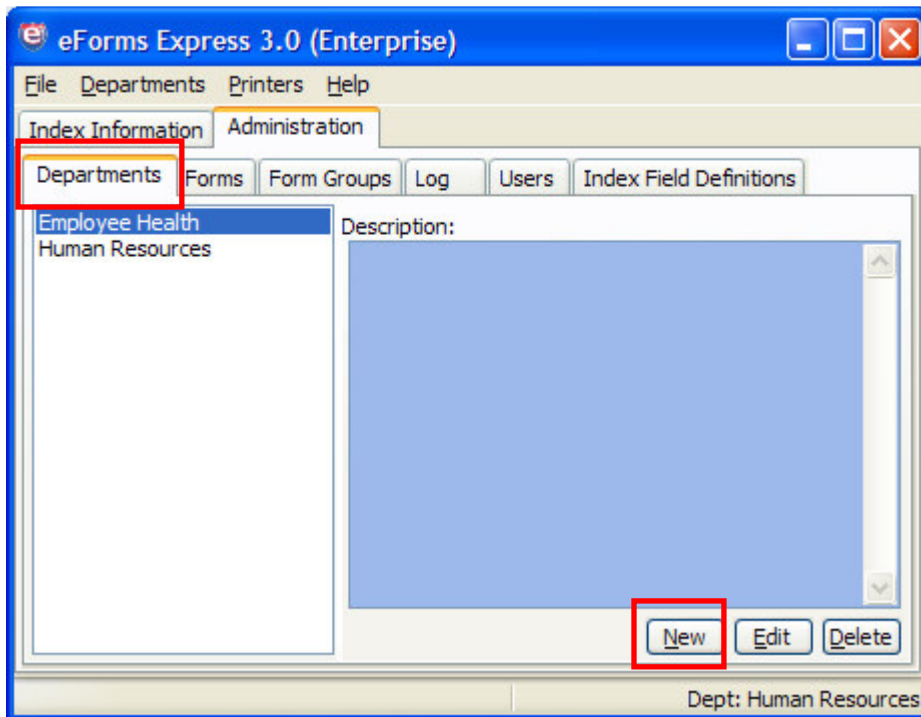


Department	This section would be used to create a department.
Forms	This section would be used to create a global form.
Form Groups	This section would be used to create global forms group.
Log	All users can see this tab
Users	This section is used to create all users.
Index field definitions	This section 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:



Select the **Departments** tab>**New**.

The following window will open.

The screenshot shows a software window titled "Department" with a "Printer" tab. The "Department Name" field is highlighted with a red box and contains the text "This is my new department". Below it is a "Description" text area. The "Search On" dropdown menu is set to "Tab Key Press". There are two input fields for "ID Barcode": "Prefix" and "Suffix". To the right, there is a section for "Allow Reprint" with three radio button options: "All Users", "Dept. Admins", and "System Admins". Below these are several checkboxes: "Confirm Print" (checked), "Disable Printer Search", "Import Dates as 2-digit Year", "Reset form selection after each print", "Store form selection between eForms Express sessions", and "Require Auto Fill search to print". At the bottom right, the "Save" button is highlighted with a red box, and the "Cancel" button is next to it.

Enter the department name and then click save.

**Note: For further information see Administration (Department).**

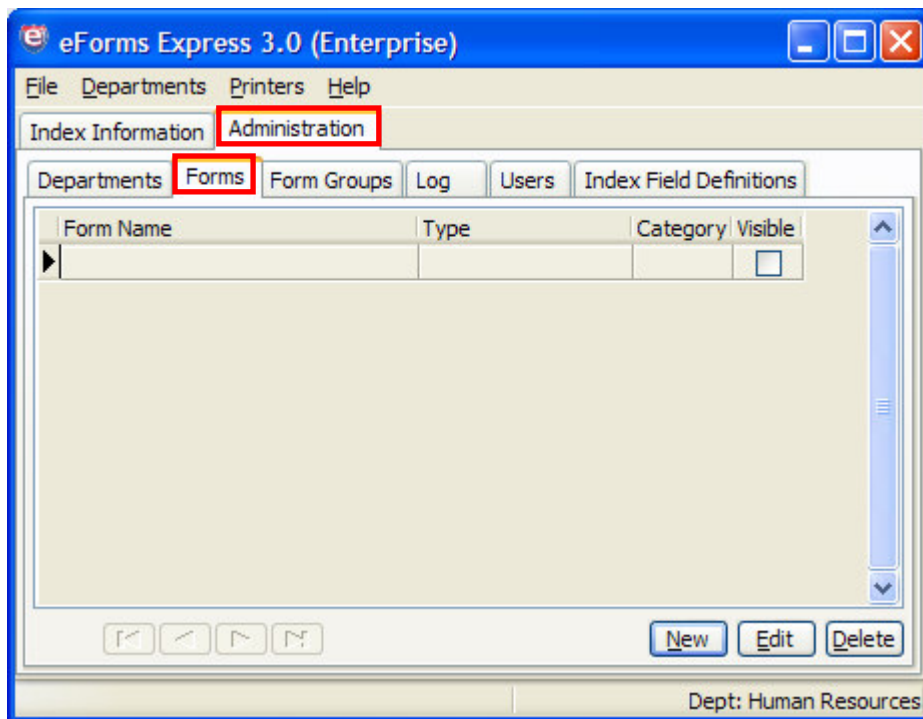
## 2.2 Creating Forms (Global)

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:



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

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

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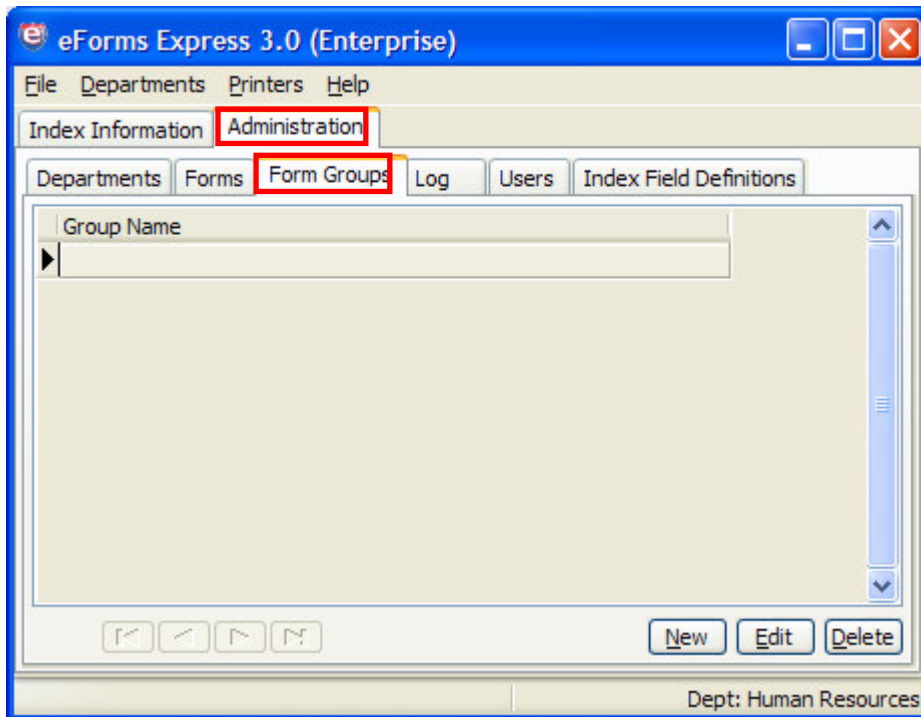


## 2.3 Creating Forms Groups (Global)

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.

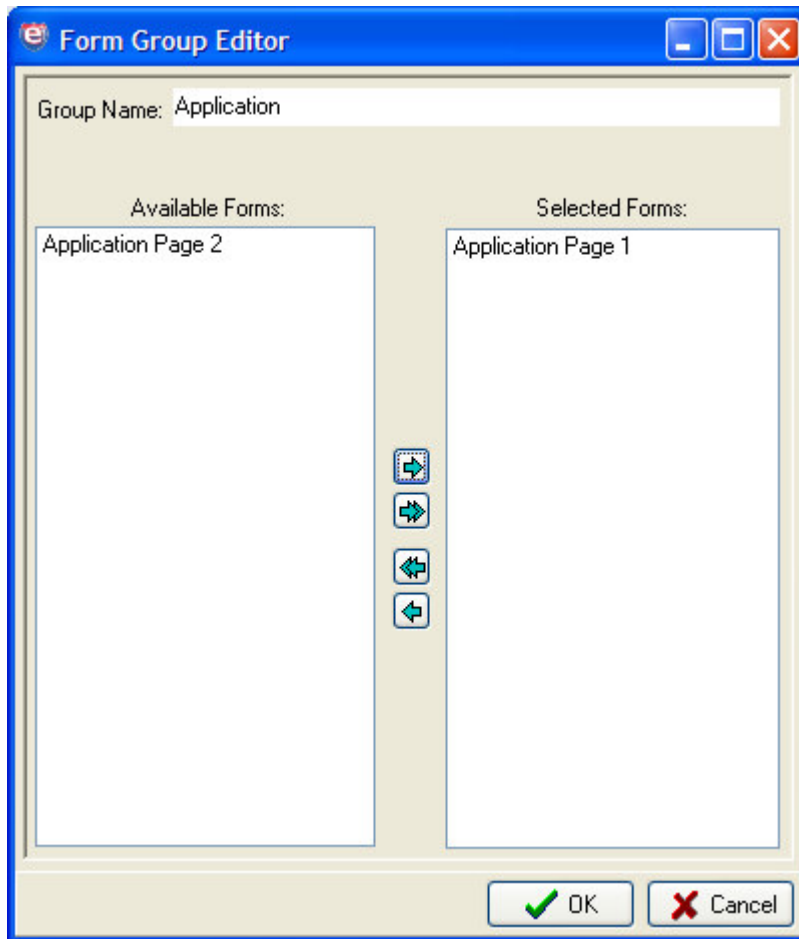
Form groups allow you to group individual forms and print them as one form set.

Log into eForms Express with System Admin credentials:



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".



**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.

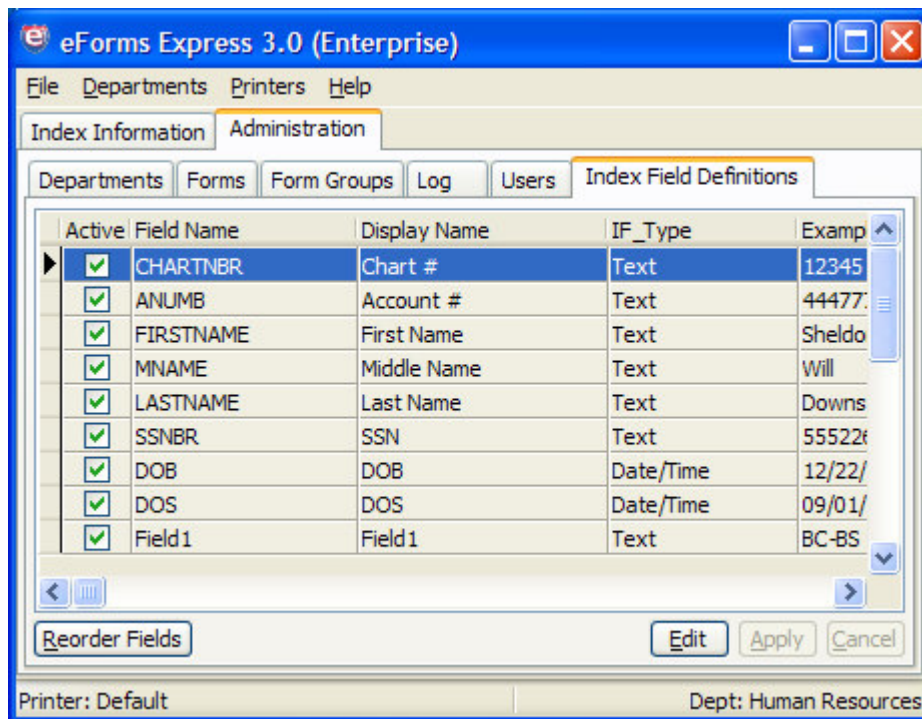
## 2.4 Index Field Definitions

The Index Field Definition tab contains the global index fields that are the column names found inside the eForms Express Database. All collected data in each department 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.



You can select the required field and then click edit.

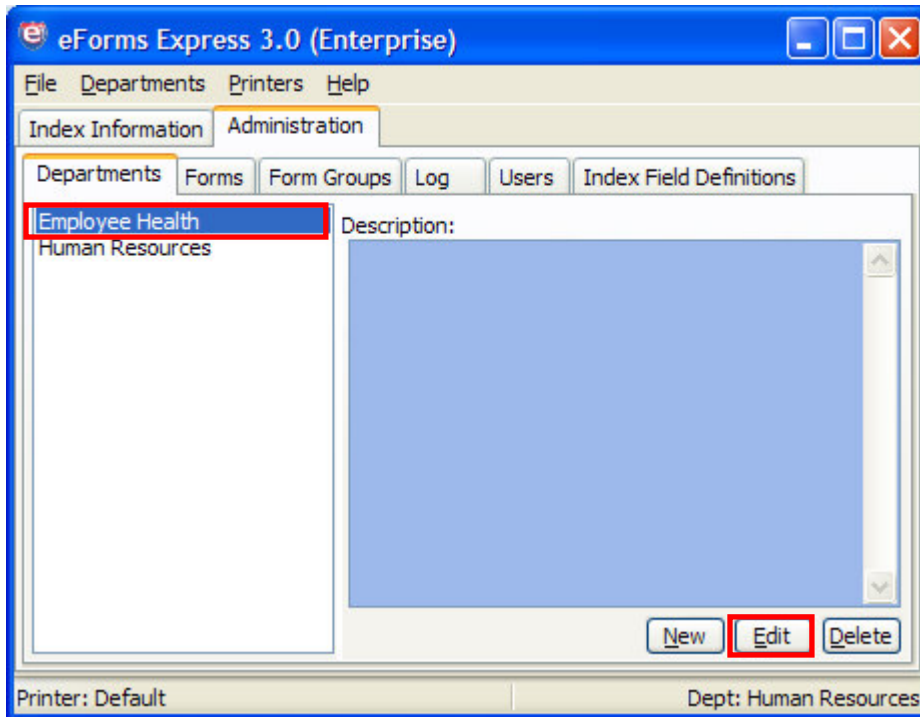
Field Name	This is the column name inside the eForms Express Database. <b>No spaces allowed.</b>
Display Name	This the friendly name that will be displayed.
Example / Test Value	This will provide sample data when a look-up DB is not available.
Field Type	Text or Date (SQL field definition)
Form Code	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

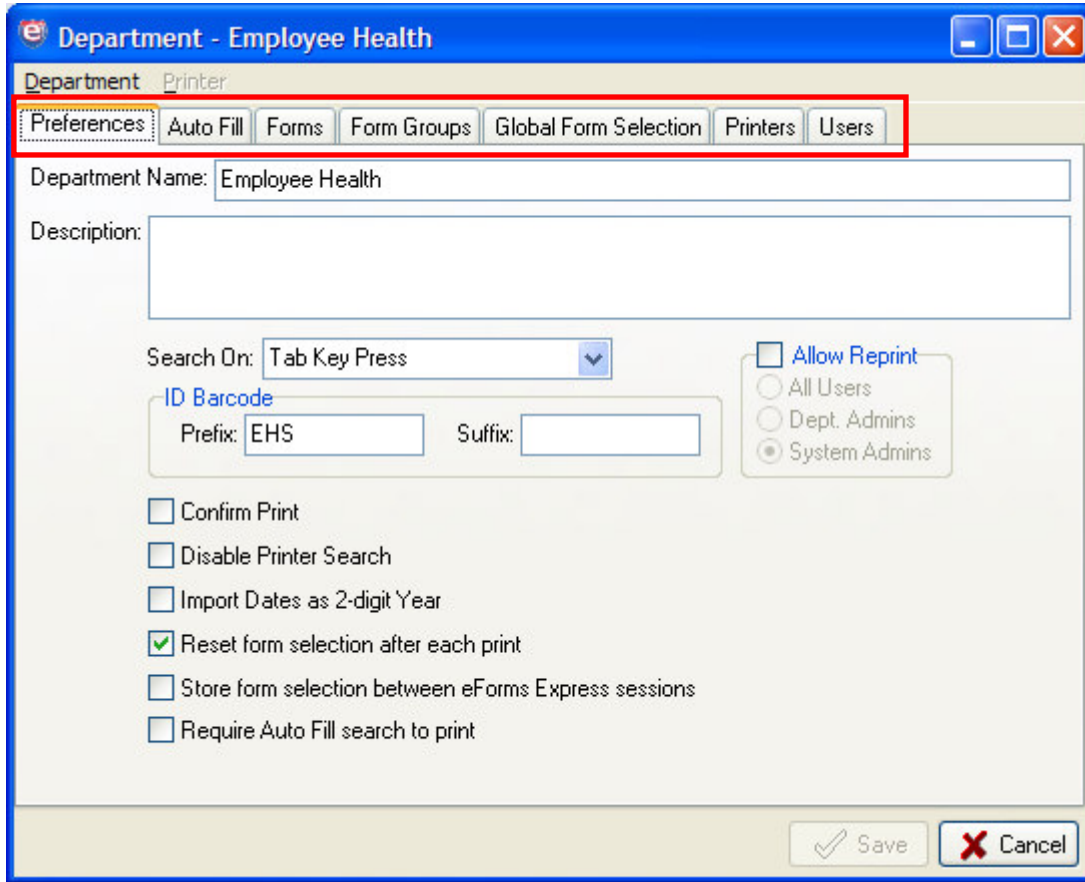
Log into eForms Express with System Admin or Dept. Admin credentials:



Select a department and click "Edit".



The department edit window will open.



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

The screenshot shows a software window titled "Department - Employee Health". The "Preferences" tab is selected and highlighted with a red box. The window contains the following elements:

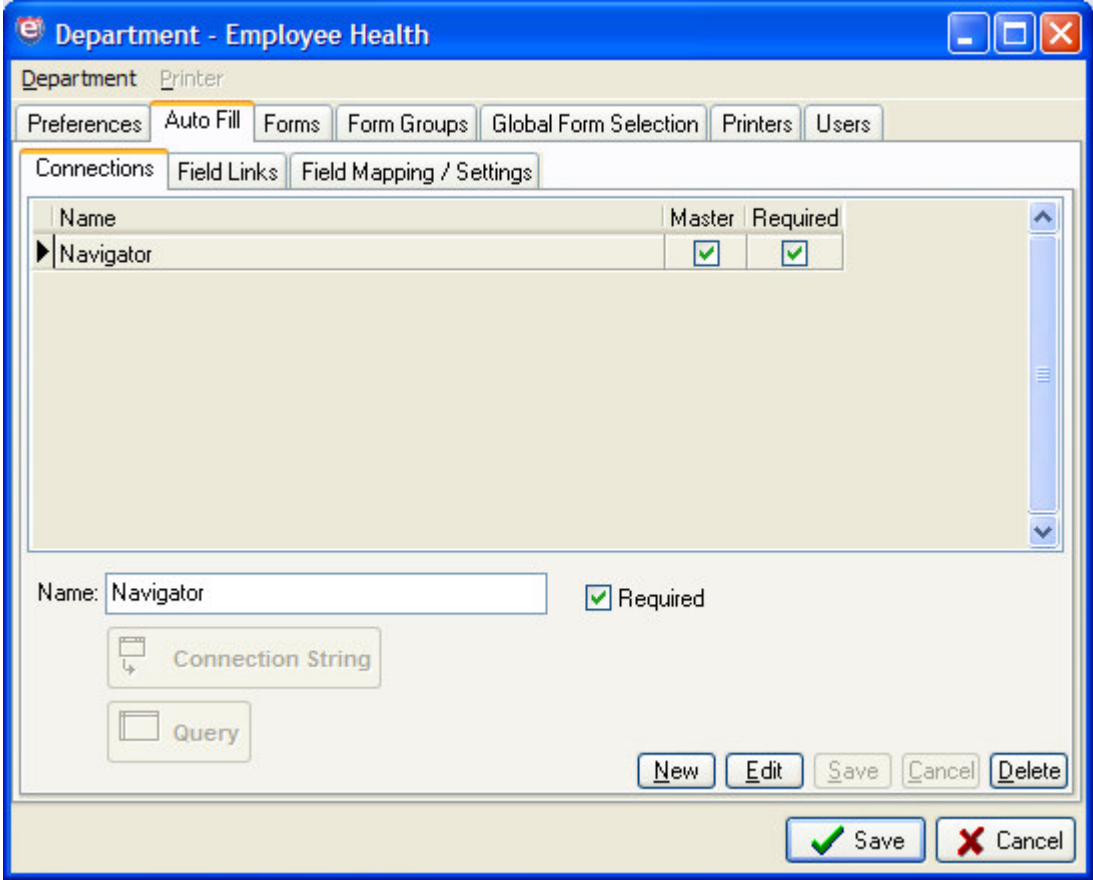
- Department Name:** Employee Health
- Description:** (Empty text box)
- Search On:** Tab Key Press (dropdown menu)
- ID Barcode:**
  - Prefix:** EHS
  - Suffix:** (Empty text box)
- Allow Reprint:**
  - All Users
  - Dept. Admins
  - System Admins
- Confirm Print
- Disable Printer Search
- Import Dates as 2-digit Year
- Reset form selection after each print
- Store form selection between eForms Express sessions
- Require Auto Fill search to print

At the bottom right, there are "Save" and "Cancel" buttons.

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.

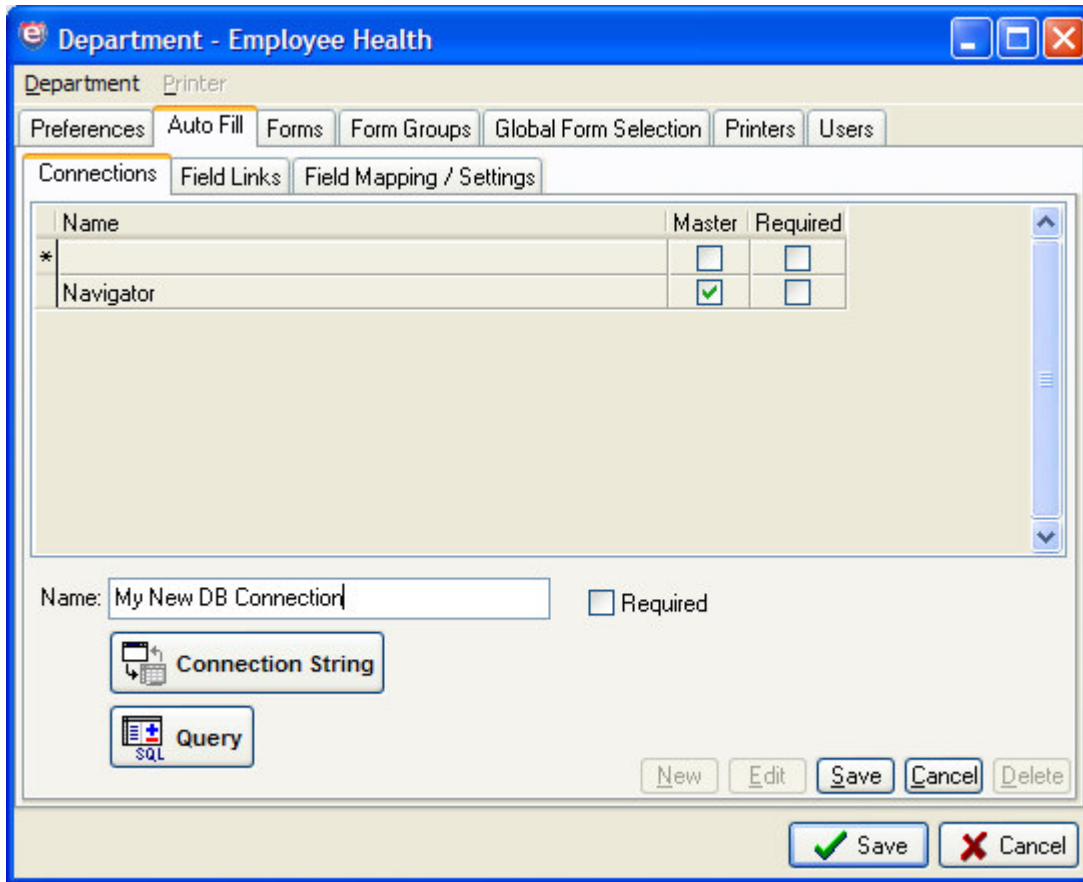
### 3.3 Auto Fill Tab



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

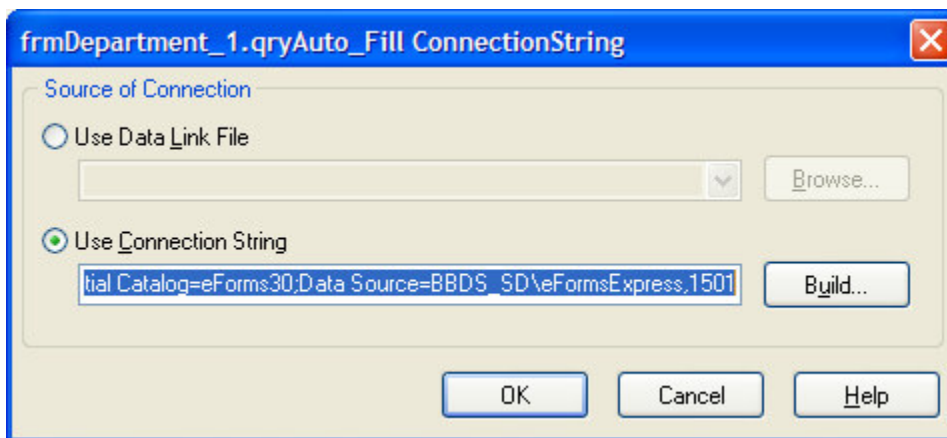


### 3.3.1 Creating a new DB connection



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

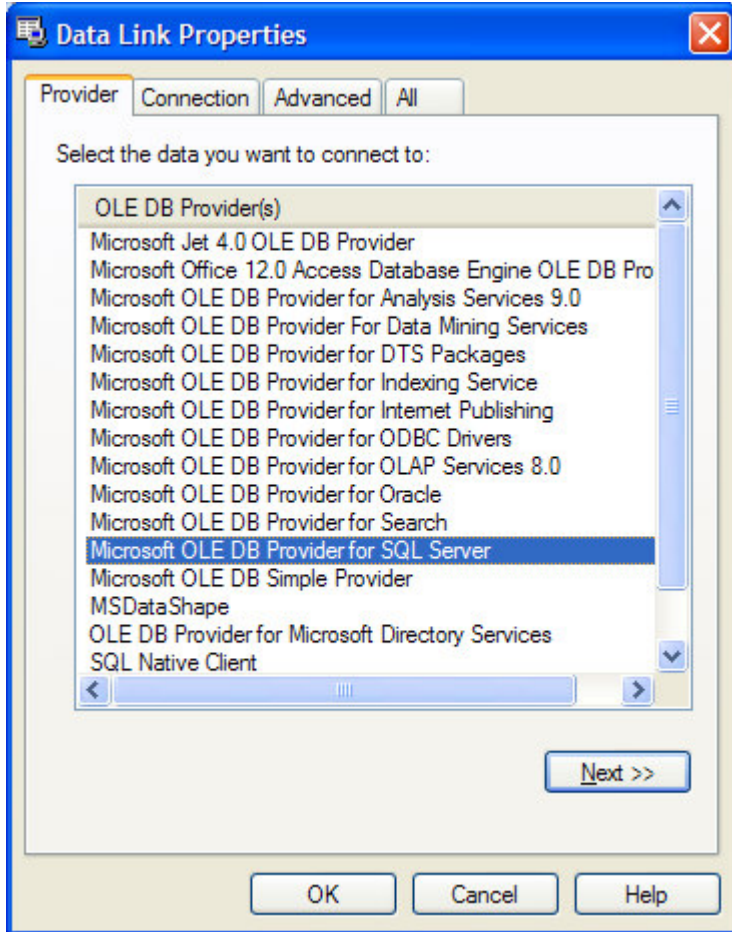
A new window will open:



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

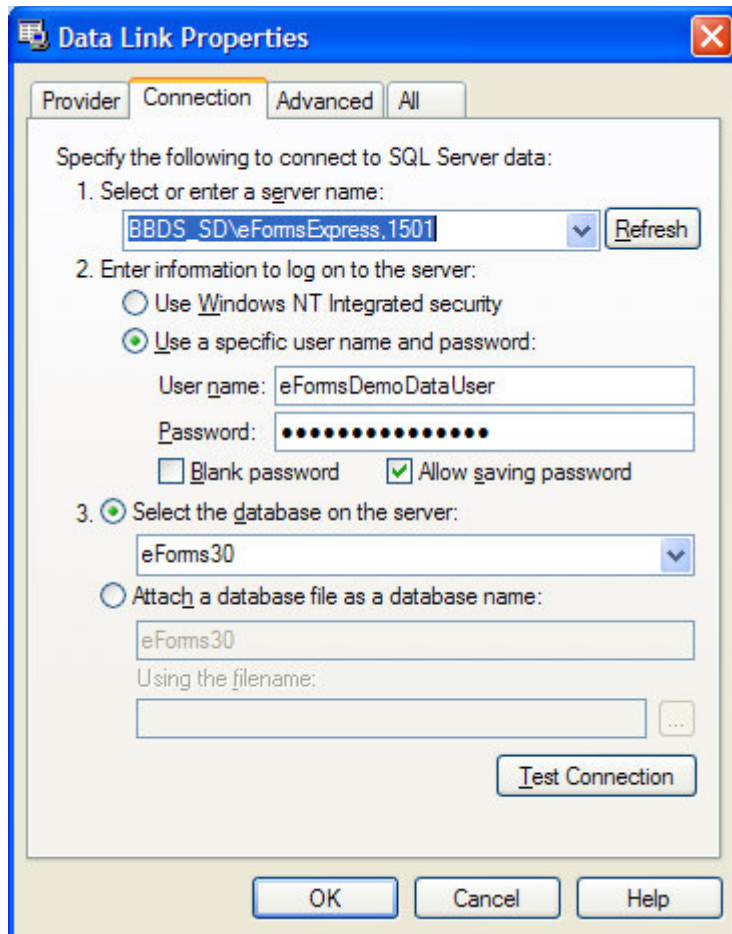
### 3.3.2 DB Connection Wizard

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



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

The connection tab window will appear:



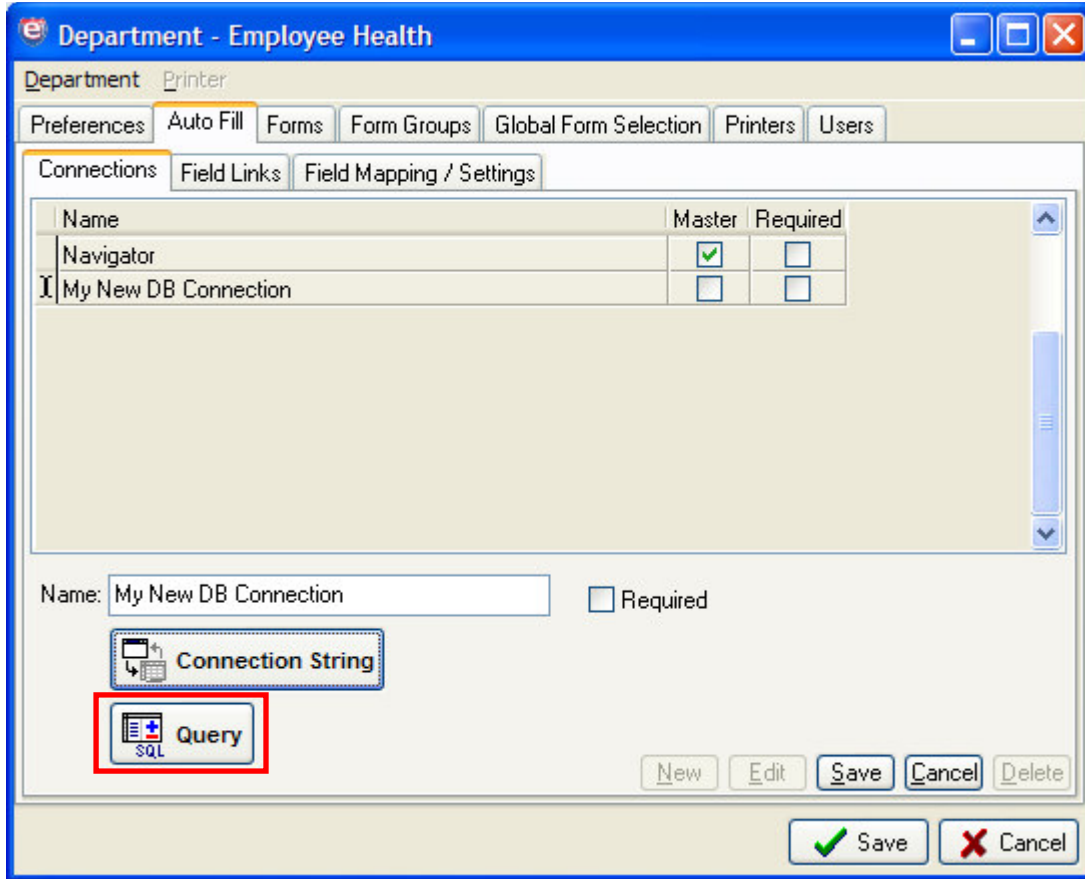
Input all required information and then click test connection.

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



Click "OK">"OK".

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

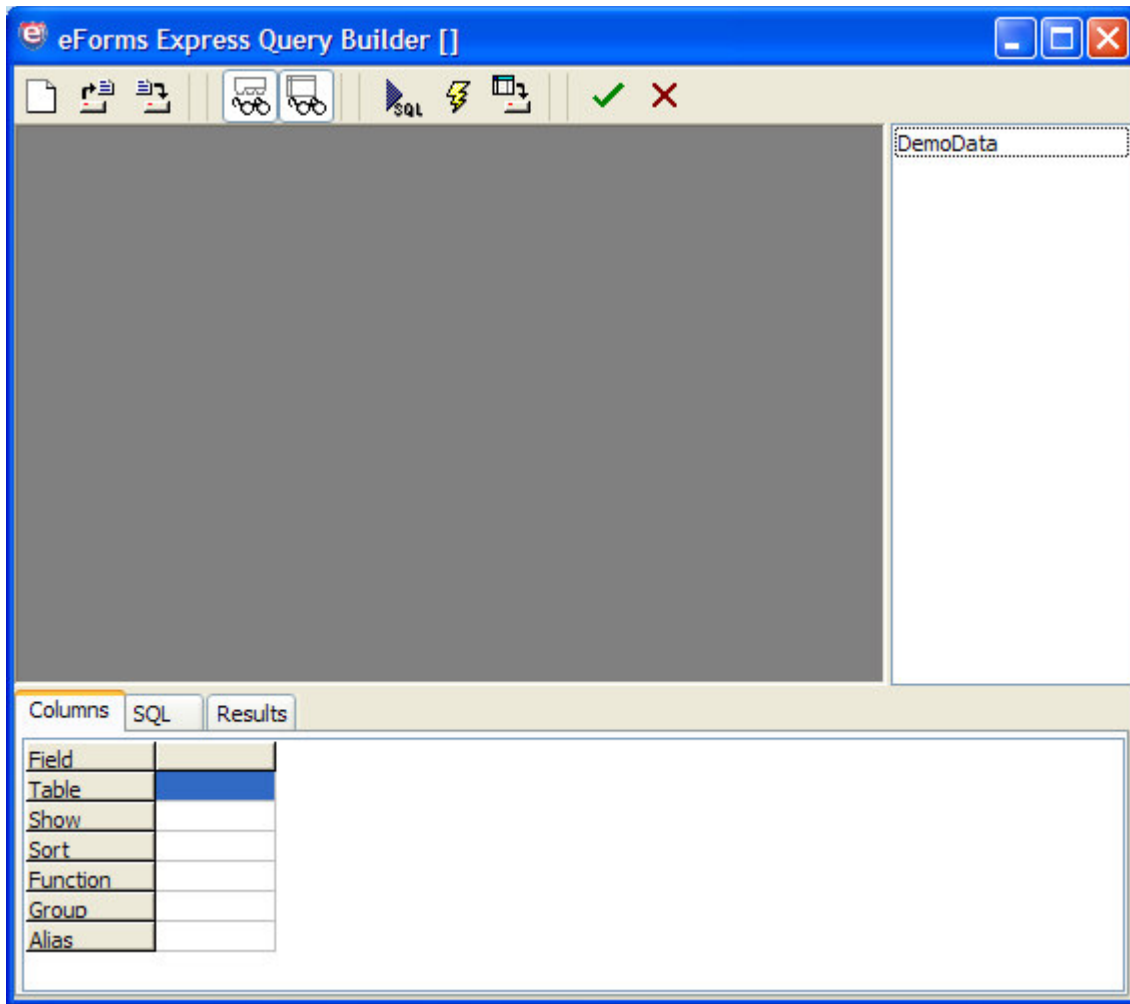


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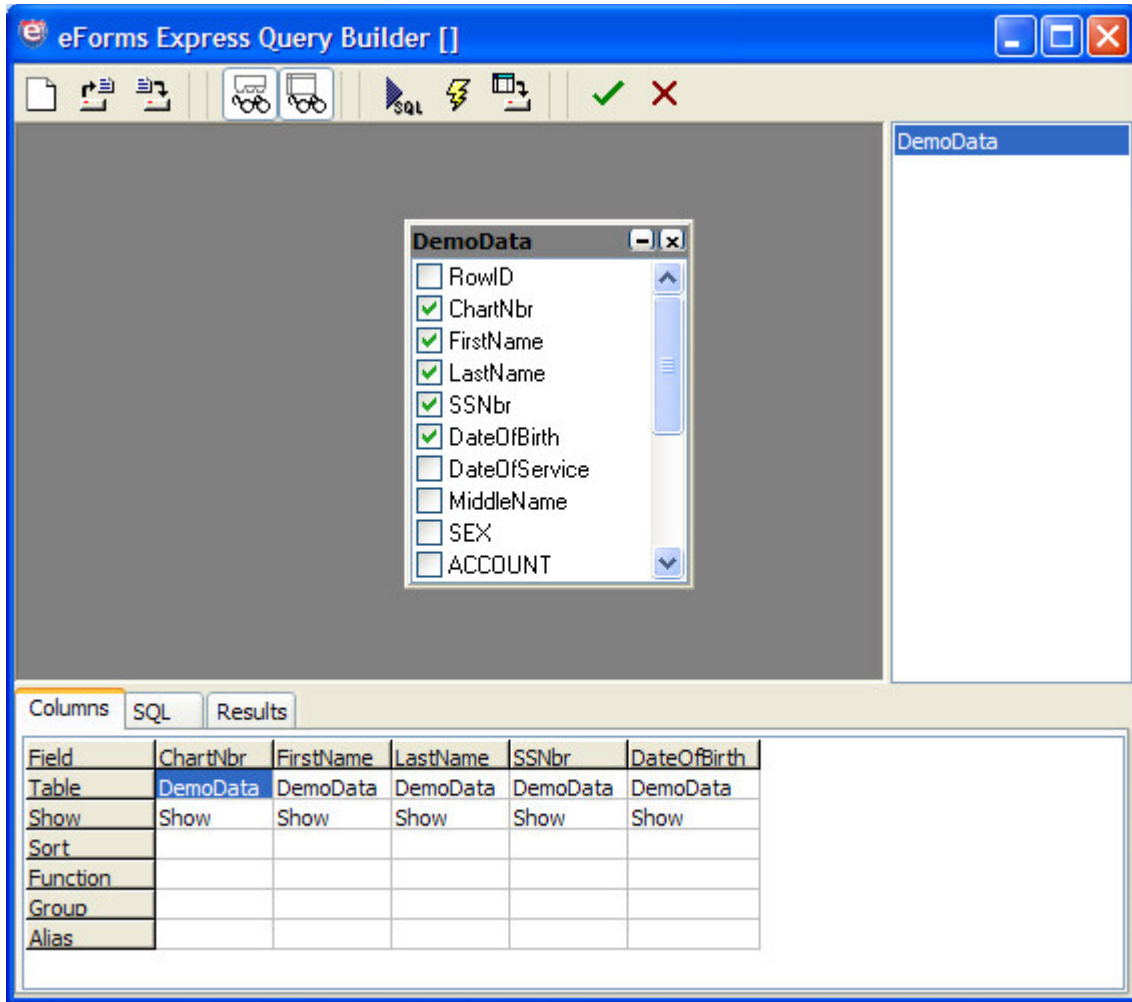
The Query Builder wizard will appear:



On the right side you will see all available tables.

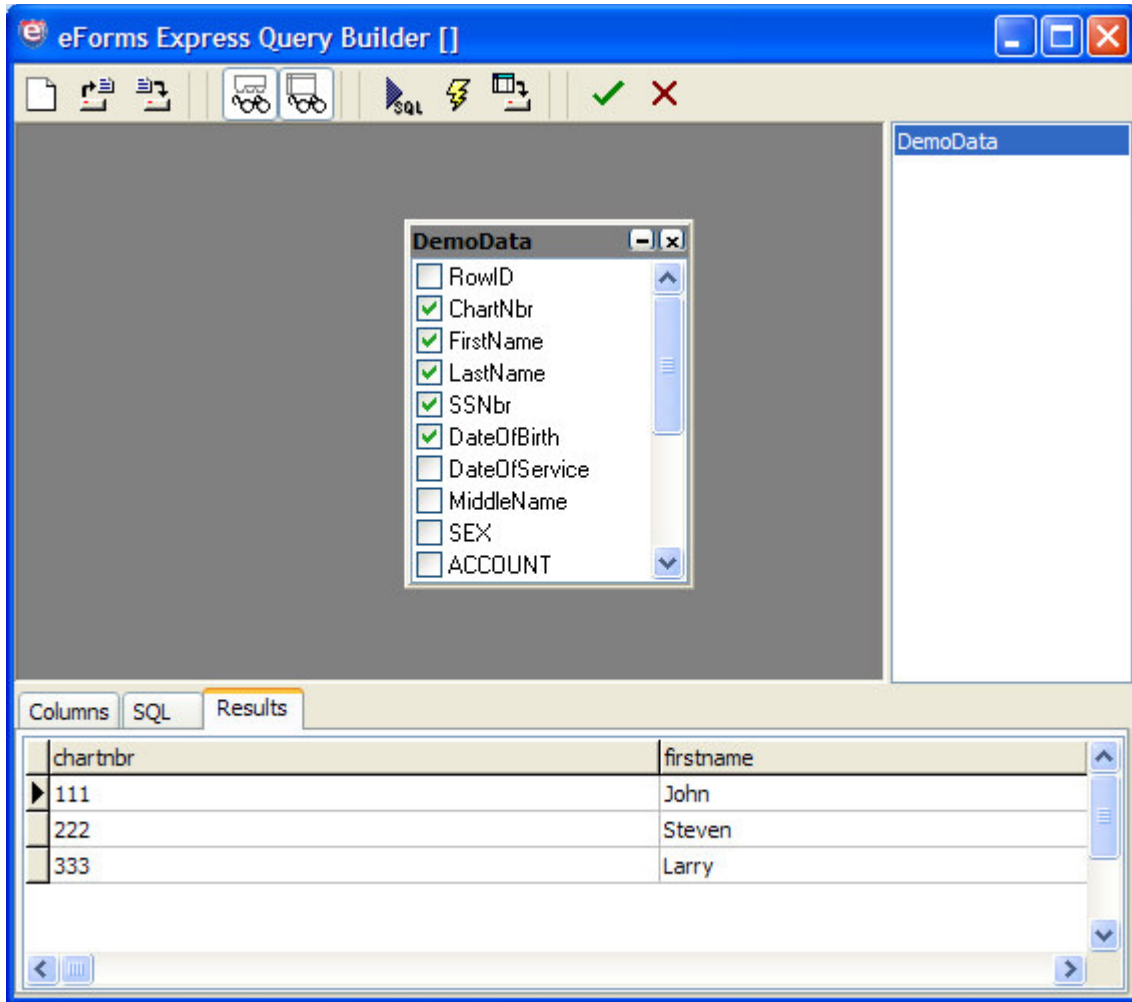


Click and hold the desired table and drag to the grey pane on the left side.



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

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

Index Field	Auto Fill Field	Visible	Required	Search	Manual
Employee ID	My New DB Connection.CH/	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cost Center		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SSN		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOB		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sex		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

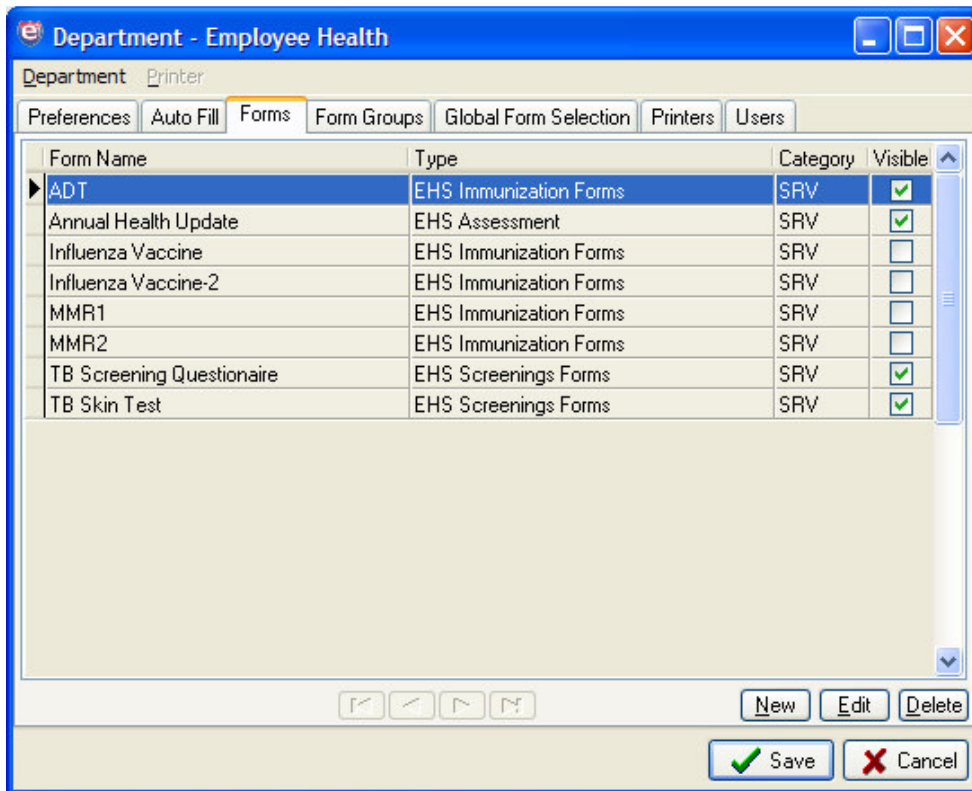
Click the "Save" button to save your selections.

### 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:



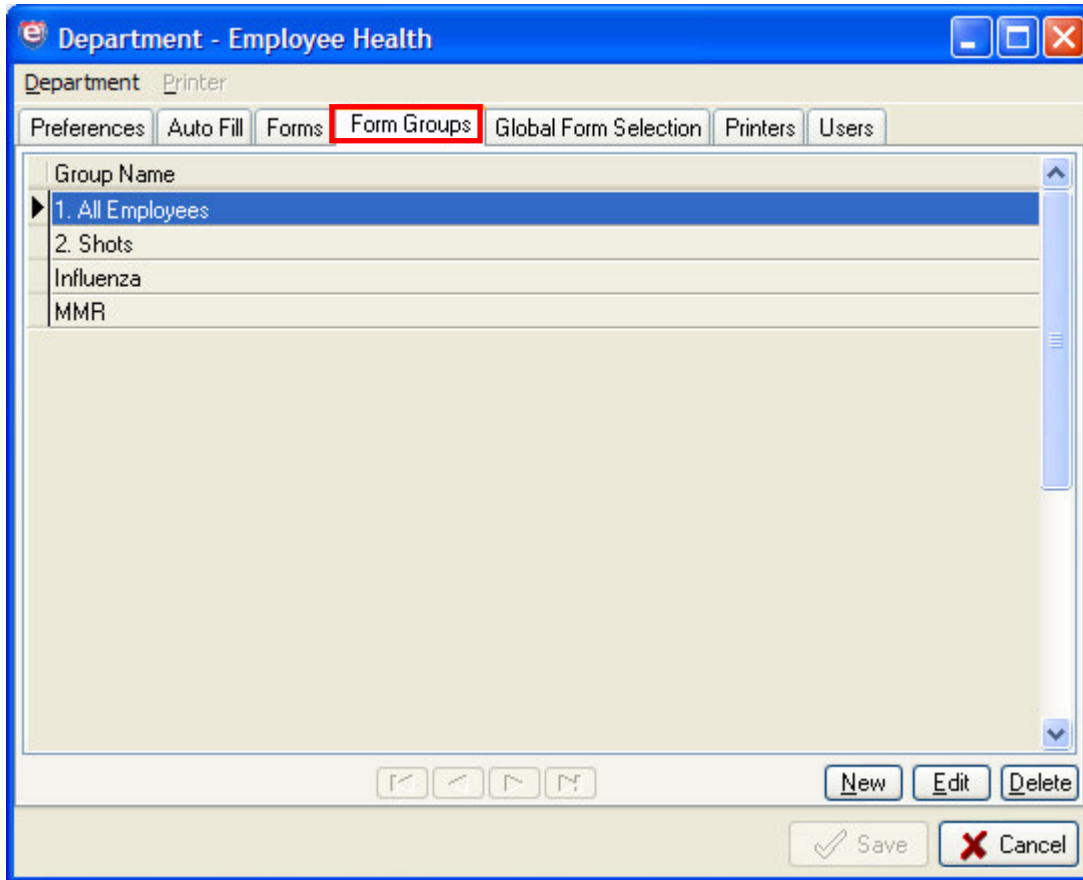
Select Administration>Departments Tab. Select New or Edit. Once the department window opens select the Forms tab.

### 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.

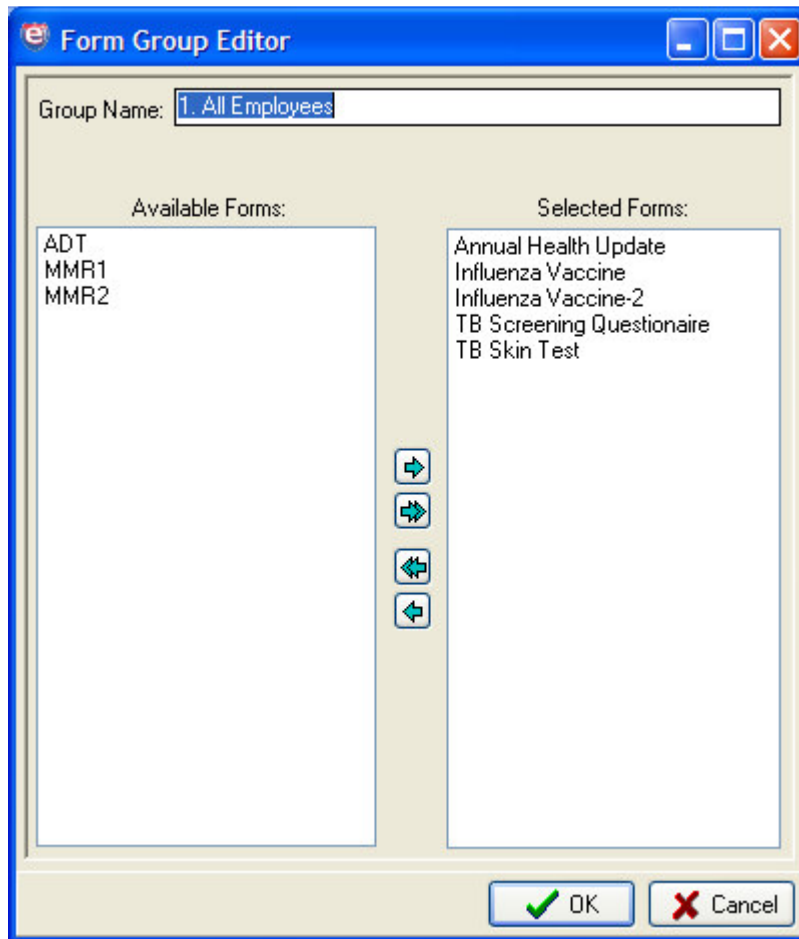
Form groups allow you to group individual forms and print them as one form set.

Log into eForms Express with System Admin credentials:



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

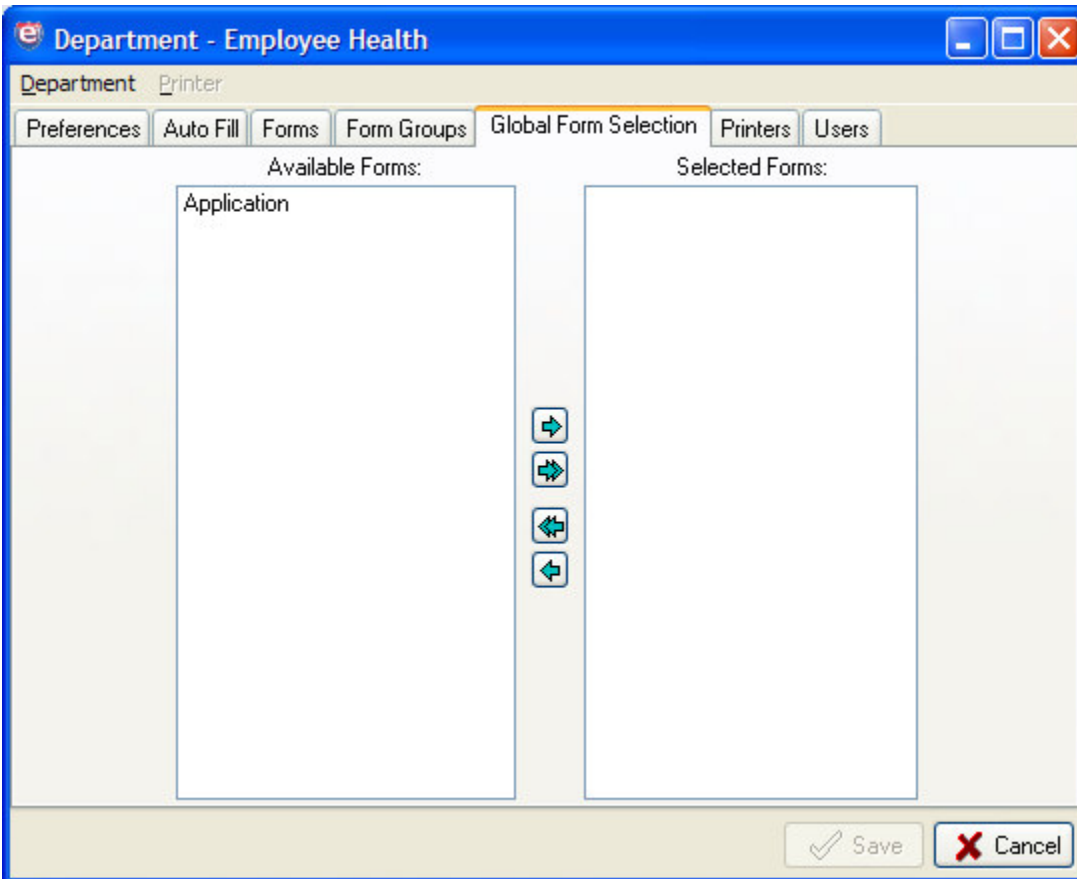
The form selector box will open. Highlight the required forms and click the right arrow to add or the left arrow to remove. Then click "OK".



**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.

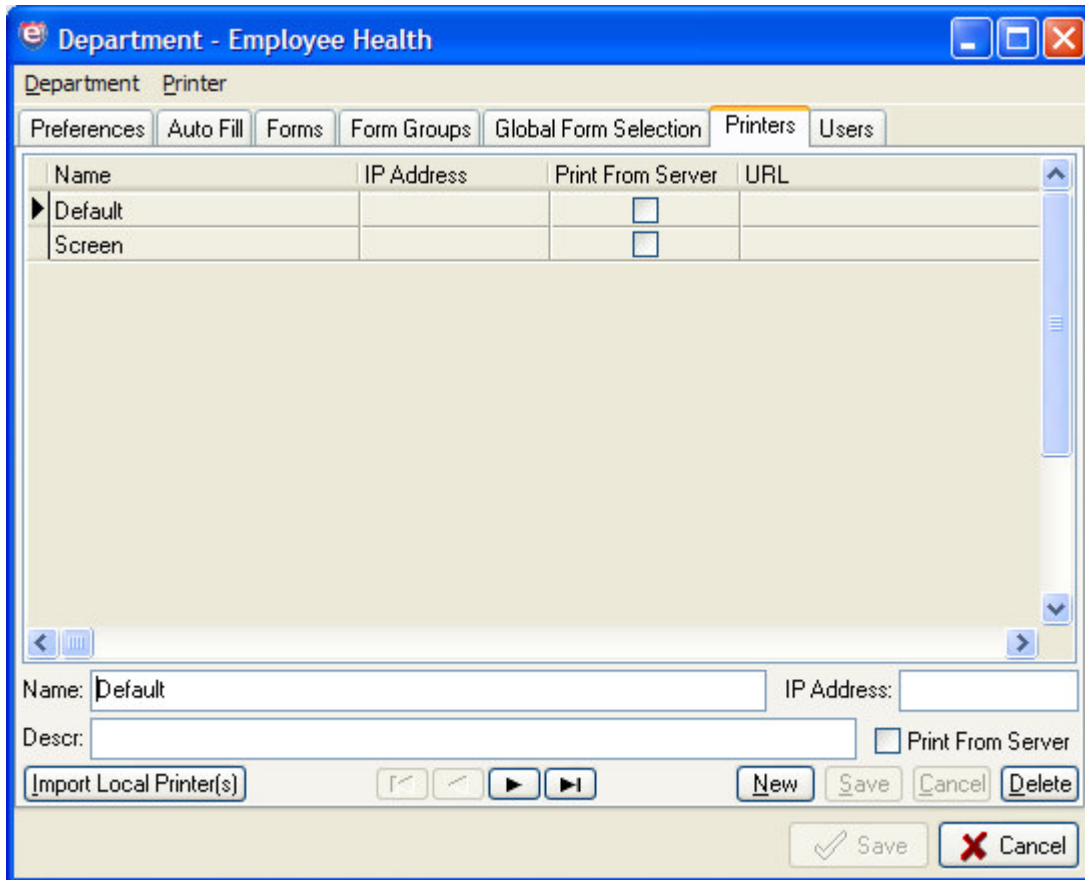


**Note: Shift >Mouse click and Control> Mouse click will work when adding multiple forms.**

### 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.



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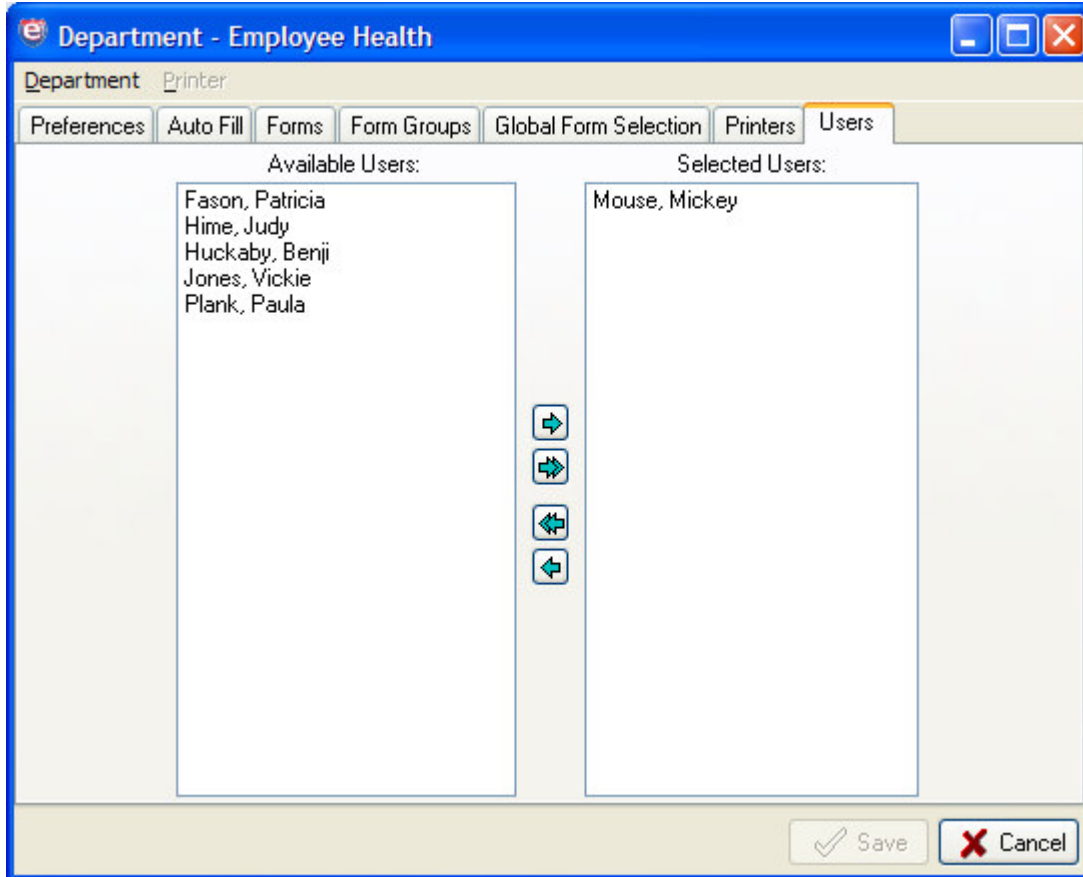




### 3.7 Adding Users (Department)

You must add users to the specific department:

Sign-In as a System or Dept Admin:



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.