



User Guide

External Data Capture Add On
V21.1.0200

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EFI PrintStream | V21.1.0200 External Data Capture Add On User Guide

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Introduction

Overview

The External Data Capture Add On program allows time capture data related to jobs to be imported or exported via Access.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com
Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.	
Note	For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

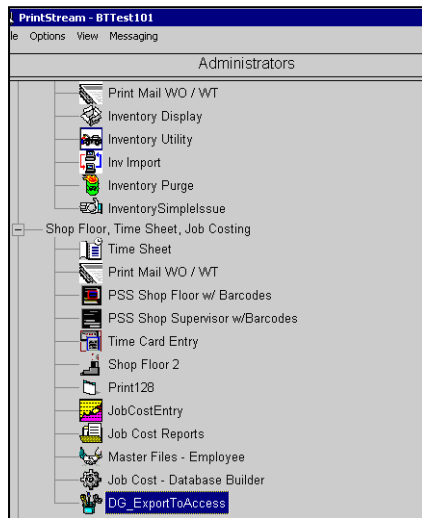
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E-Mail:	ProfessionalServicesOperations@efi.com
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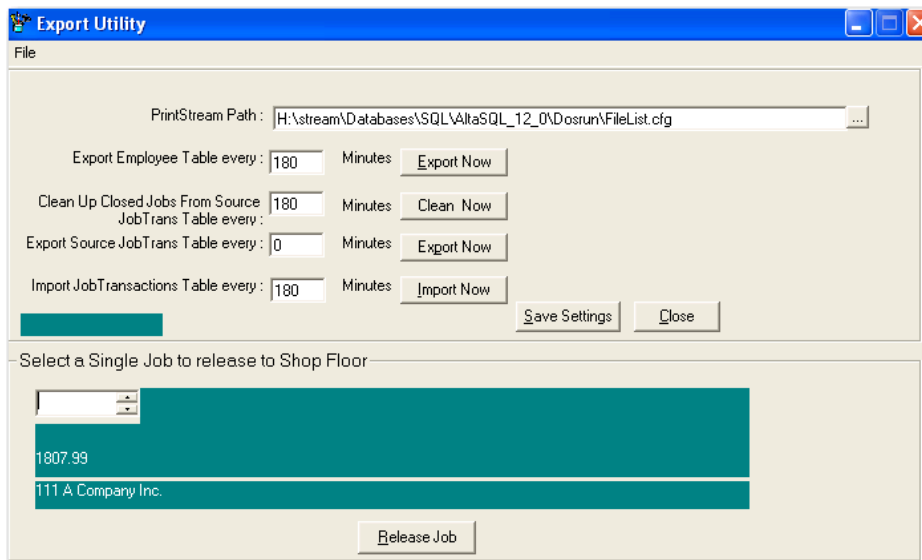
External Data Capture

Locate the **DG_Export to Access** program on your menu bar. Launch the program.

Note Remember to first test this program in your Test database before using it in your Live database.



When the program opens for the first time, you are required to set your database path. Select **Export Now**. This should create an Access database titled **PSExportedData.mdb** in your **Stream\Winexe** folder. If it does not, please contact Streamline.



Definition of fields

PrintStream Path- Path to database.

Export Employee Table- can be exported periodically or immediately. The procedure synchronizes the PrintStream Employee table with the Access DB. The updated records are marked with "U" in EMPLOYEE("FLAG") if the record was changed, "D" if employee was deleted, "N" if the new record was created in PSExportedData.mdb.

Clean Up Closed Jobs From Source- removes final invoiced job records from the PSExportedData.mdb.



Export Source Job Trans Table- create/update records available for the Data Collection (job data is exported immediately via the Mail Estimating module, explained later in this document.

Import Job Transactions- importing the records which are populated by a Customers Data Collection system, using parameters from the SrcJobTrans(Source Job Transactions Records) to the PrintStream JobCosting. Processed transactions are marked as "Y" in the ProcessFlag record ("E" if error occurred during import procedure). A listing of the required fields when importing job transactions can be found in the section titled Import Process.

Import, Export and Clean Now- allows you to import and export on command rather than using the timer.

Note Each category above references a field prior to the word Minutes. This field works with the timer feature explained later in this document.

Select a Single Job to release- allows you to export one job at a time. Enter a job number and select Release Job.

To release a single job, enter the job number and select release job.

The screenshot shows the 'Export Utility' window. It features a 'File' menu and a 'PrintStream Path' field with a browse button. Below this are four rows of settings, each with a text input, a 'Minutes' label, and an action button: 'Export Employee Table every: 180 Minutes' with 'Export Now', 'Clean Up Closed Jobs From Source JobTrans Table every: 180 Minutes' with 'Clean Now', 'Export Source JobTrans Table every: 0 Minutes' with 'Export Now', and 'Import JobTransactions Table every: 180 Minutes' with 'Import Now'. At the bottom of this section are 'Save Settings' and 'Close' buttons. A section titled 'Select a Single Job to release to Shop Floor' contains a dropdown menu currently showing '1295 Demo'. Below the dropdown is a list of other jobs: '1585.99' and '111 A Company Inc.'. A 'Release Job' button is located at the bottom right of this section.

Export Process

The program automatically creates an access database, titled **PSExportedData.mdb**, in the **Winexe** folder when the program is generated for the first time.

The database contains tables for exporting data from Employee, Machine, and Source Job Transaction tables. (MAILVRS, ESTIMATE, SCHEDFIL).

Once a valid PrintStream path is set, the export operations occur by either the user manually exporting/importing data by selecting the **Export Now** or **Import Now** buttons for each respective category, or PrintStream can continuously export/import data on a timer without user intervention.

To set the timer, you must keep this program running on at least one computer at all times in order for the timer to work. We suggest running it on the server. For the timer to work, enter time increments for the Export Employee Table and Clean Up Closed Jobs From Source JobTrans Table. The Export Source JobTrans Table option occurs automatically each time a job is created in the Mail Estimating program, explained later in this document. Therefore, a time increment is not required. A time increment must also be defined for the Import Job Transactions Table if importing labor. Click **Save Settings** when done.

Note An error log file (Error.log) in the application path contains details of errors occurring during the export process.

Import Process

The program also creates a table in the access database for storing the Job Transactions into the PrintStream database. It is assumed that the job transactions would be available in the JobTransactions table for Import.

The data from the Access database would be used to create records in PrintStream's JobTrans table.

Below is a list of the required and optional fields for the import process:

REQUIRED FIELDS	OPTIONAL FIELDS
MachineNo	ShiftNo
JobNo	PackageNo
ActivityCode	StartHours*
EmployeeCode	StartMinutes*
Date	EndHours*
Quantity	EndMins*
ChargType	WorkOrderBarCode
	DropNo
	Ref_No
	Transaction Type
	RecordingHrs*

When a record is processed, the **ProcessFlag** column in the table is set to **Y**. If there is a problem with records being processed, an error message displays in the **ErrorMessage** column of the table, and the **ProcessFlag** column reflects an **E**. If corrections are made to the record, it is gathered for processing the next time the import process executes.

*It is assumed that the **Date** column contains the Start date, and Start and End Times are in the military format without any AM/PM. The valid values for Start Hours and End hours are 0-23. The valid values for Start minutes and End minutes are 01-59. **If the Start and End Times and Start and End Mins fields are not used, the RecordingHrs field must be completed and vice-versa.**

It is also assumed that when the **Complete** flag is **Y** in the table, the corresponding record (specified by the WorkOrderBarCode) in PrintStream's SCHEDFIL table would be updated to **Completed - Y**.

The WorkOrderBarCode may either contain just the Schedfil recnum or the workorderbarcodekey like **S:3006-4-0** where **3006** is the SCHEDFIL recnum, **4** is the package number and **0** is the drop number.

Examples for Setting the Time Interval

When the time Interval is set to 00:50, the process would be executed after every 50th Minute.

When the time Interval is set to 02:00, the process would be executed once every 2 hours.

Important

Note Please do not delete the **PSExportedData.mdb** and **Readme.txt** files from the application path.

Auto Export Job Data from Mail Estimating

As mentioned earlier in the document, PrintStream can automatically export Job Data to the PrintStream JobTrans table without using the timer. Due to the potentially large amount of data captured for jobs, Streamline advises against using the timer for this function because of the resources consumed, and instead have the Mail Estimating module export the data. Please contact PrintStream to activate this feature.

Once activated, quotes with components are created as normal in Mail Estimating.

The screenshot shows the 'Mail Estimating' window for a job titled 'postcard-10,000'. The interface includes a menu bar (File, Window, Changes, Refresh Master Data, Help) and a toolbar. A left-hand navigation pane lists various steps: Quote Header, Estimating, Scheduling, Data Processing, Component Process, Packages, Finishing, Drops & Postage Es, Special Instructions, Review Pricing, and Order Entry. The main area contains a form with fields for Description (postcard), Versions (1), Source, Date on Hand, Item # (537), Inventory Code (postcard version 1), Inv. Description, Overs to, Insert Notes, Comments, Quantity before Overs (10,000), Waste (0), and Total Quantity (10,000). There are buttons for 'Delete Component', 'Copy Component', 'Notes...', 'Cancel', and 'Save'. Below the form is a table of components:

Process Description	Quantity	Qty Lock	Quoted Price	All Pkgs	Sort Order
INKJET SETUP	1		\$50.00	N	P 8170
INKJET FLAT & SORT	10,000		\$415.00	N	P 8200

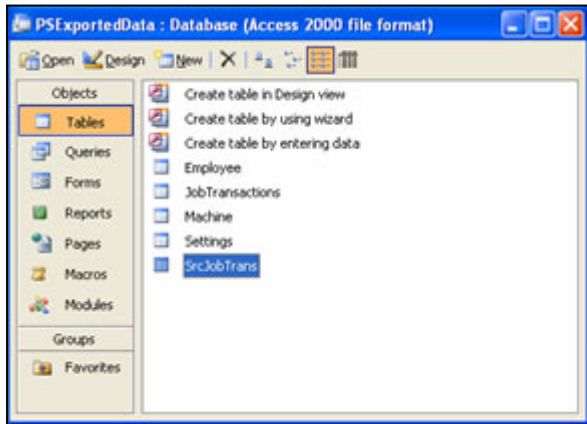
When the estimate is calculated and converted to a job, the following question displays upon closing the Mail Estimating program:

A 'Confirm' dialog box with the text: 'Would you like to update ShopFloor records with changes to the Job # 1336?' and two buttons: 'Yes' and 'No'.

If you click **Yes**, you receive notification the job was released.

A 'Job Released' notification dialog box with an information icon and the text: 'Job was successfully released to shopfloor.' and an 'OK' button.

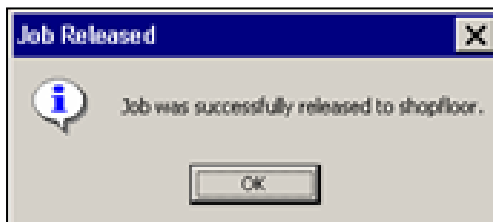
When opening the **PSExportedData.mdb** in the **Winexe** folder and selecting the **SrcJobTrans** table, you will find records for the components to the job(s) exported. Please note **FLAG** is marked as **N** for new.



The screenshot shows the Microsoft Access application window titled "PSExportedData : Database (Access 2000 file format)". The "SrcJobTrans : Table" is open, displaying a table with the following data:

ActivityID	ActSegID	ActivityCode	WorkOrderKey	ActivityDescr	ActivitySegQty	StdQtyPerHr	FLAG
13867	18629	81010 S:13867-1-0	INKJET SETUP	1	2	N	
13868	18629	81022 S:13868-1-0	INKJET FLAT & SORT	10000	2000	N	

If processes are added or deleted, PrintStream prompts you again with the following messages after recalculating the job and closing the program.



The **PSExportedData.mdb** now shows the updated processes with the **FLAG** set at **U** for updated.

The screenshot shows the Microsoft Access application window titled "PSExportedData : Database (Access 2000 file format)". The "SrcJobTrans : Table" is open, displaying a table with the following data:

ActSegID	ActivityCode	WorkOrderKey	ActivityDescr	ActivitySegQty	StdQtyPerHr	FLAG
18629	81010 S:13867-1-0	INKJET SETUP	1	2	U	
18629	73011 S:13868-1-0	CUT 8.5 x 11 IN HALF	10000	6000	U	
18629	84042 S:13869-1-0	HAND STAMP	10000	400	U	
18629	81021 S:13870-1-0	INKJET UP TO 6x9 & SORT	10000	2500	U	