

BUILDER INFORMATION SYSTEM

BIS® Document Link & Imaging Module Manual

Copyright Notice

Copyright © 2014 by Management Information Control Systems, Inc. All Rights Reserved.

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without the prior written permission of Management Information Control Systems, Inc., 7730 Morro Road, Atascadero Suite 204, California 93422.

Builder Information System (BIS[®]) software, including BIS[®] Essential, BIS[®] Standard, BIS[®] Professional, and BIS[®] Enterprise, is licensed for use on one computer per copy only, unless stated otherwise in the sales agreement. Unauthorized reproduction, distribution, sales, licensing, or sublicensing is prohibited.

Trademarks

BIS, the BIS logo, and Drill Down+ are registered trademarks of Management Information Control Systems, Inc. Builder Information System, Report Server, Report Queue, Document Link & Imaging, and Dynamic Date Query are trademarks of Management Information Control Systems, Inc.

Windows 7, Windows 8, Windows 2003 Server, Windows 2008 Server and Windows 2012 Server are trademarks of Microsoft Corporation. Other trademarks are the property of their respective owners.

Table of Contents

Section 1 – Overview.	<u>DL-1</u>
Section 2 – Menu Access	DI -3
Access from Master Records.	
New Link.	
Accessing Existing Links	
Folder/File Tree.	
Refresh.	
Group Id.	
Description.	
Notes.	
Open With.	
Preview.	
Document	
File	
Folder.	
Scan a New Document.	
Delete Group.	
Remove	
Open	<u>DL-7</u>
Section 3 – Scan a new document.	<u>DL-8</u>
Destination Folder.	<u>DL-8</u>
Device	<u>DL-8</u>
Device Type	DL-8
Source	<mark>DL-8</mark>
Paper Size.	DL-8
Resolution DPI.	<mark>DL-8</mark>
Pixel Type	<mark>DL-8</mark>
Bit Depth	DL-8
Output File Type	DL-8
Black & White.	DL-8
Grayscale.	
RBG Color	
Palette Color	
Show Device Interface	
Scan	
Section 4 – Document Link to a Transaction	DI -12
Section 5 – Administrator – Attached Documents.	DI -15
	<u>DL 15</u>
Section 6 – Google Maps	DI -17
	<u>DL-17</u>
Section 7 – Word [®] Mail Merge	DI 10
Adding Merge Fields.	
Report Types.	
Mail Merge.	
Document	
Order By.	
Options.	
Fields	<u>DL-22</u>

Section 8 – Excel [®] Export.	DL-25
Conditions Tab.	DL-26
Field	DL-26
Operator.	DL-27
	<u>DL-27</u>
Ending	
Join	DL-27
Insert Line	
Delete Line.	
Export	
Index	DL-29

Conventions Used In This Manual

Every effort has been used to try to make this manual as useful and informative as possible. To accomplish that goal, several conventions have been used to assist the reader.

▲ Caution

These boxes contain warnings about things the user MUST check or of items the user should be aware before proceeding. In many cases, the advice is to check with the C.P.A. or other tax advisor.

🄍 Tip

Tips offer special information, considerations, or other insights when undertaking the task described.

Hyperlink

A hyperlink is shown with an underline as it is shown by default in the program. Hyperlinks may be found in screen forms or in screen previews of reports.

In some instances, individual screen buttons are shown in the text, such as the Magnifying Glass 🞑 icon.

Section 1 – Overview

The Document Link & Imaging module is a powerful addition to BIS[®] that allows construction offices to move rapidly into the 21st century. All resources related to BIS[®] transactions, master files, and reports can now be linked quickly and easily, enabling users to centralize supporting information. The resources links are only limited by the software on the computer.

Here are just a few examples:

- Link blueprints and job site photos to job files.
- Link actual accounts payable scanned invoices to Vendor Invoices.
- Relate external work orders to figures on job cost reports.

Users can do all this and more with Document Link. The Document Link module helps companies to be more efficient by allowing users to centralize support files quickly and intuitively.

The easy-to-use interface lets users organize all needed files into folders, alphabetically or by file type. Descriptions and notes can be added so that users know exactly what information the file contains. The image button in Document Link can initiate a scanner. Linking documents is easy and intuitive. Company staff can use Document Link to centralize job information, allowing for better communication on projects.

The BIS[®] Document Link module lets users create a mail merge from within the program. Use existing vendor, employee, customer, and job lists already stored in BIS[®]. Document Link intelligently works with Microsoft[®] Word[®] to use any template desired to create a filtered merge. For example, users can create bid requests and employee notices specific people. These unique merge capabilities can save an enormous amount of time. Document Link makes it easy to create the documents companies need.

BIS[®] Document Link lets users export most master record data into an Excel[®] spreadsheet. Use existing master records already stored in BIS[®]. Document Link intelligently works with Microsoft[®] Excel[®] to create a filtered spreadsheet. For example, users can create tables of employees with data selected with flexible criteria. This unique export feature can save an enormous amount of time. Document Link makes it easy to create the additional spreadsheet records companies may need.

BIS[®] Document Link lets users capture documents easily from scanners or digital cameras. The program provides a powerful tool to link to scanners and digital cameras. There is no need to exit BIS[®] to capture files. BIS[®] lets users manage all sources for digital imaging. When scanning, users have control over the resulting file format, the resolution, and the image size. BIS[®] Document Link provides on-the-fly ability to create resources.

If a quick map is needed for a job site or vendor location, the program seamlessly integrates with Microsoft[®] Map Point[®] 2004. Simply click on the Map Point[®] toolbar button in BIS[®] and MapPoint[®] automatically displays map information from the selected address in BIS[®]. (The feature is available only with users who have installed MapPoint[®] 2004.)

For the remainder of the manual, the Document Link & Imaging module may be abbreviated and referred to as DL.

Section 2 – Menu Access

Access to Document Link functions is different from most other modules in BIS[®]. With most other modules, users can access their functions by either using the module menu or using the standard menu, accessing the particular module function needed.

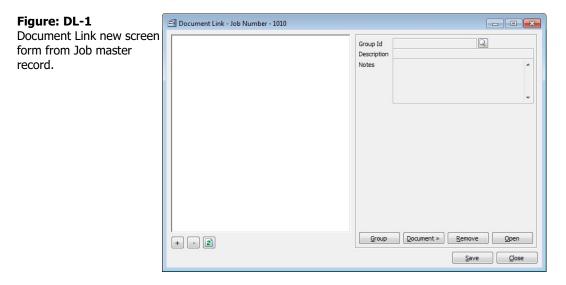
The Document Link functionality can be accessed from most master record or transaction entries by clicking on the paperclip icon on the toolbar. Documents can be linked either individually or as a part of an existing folder.

Access from Master Records

This section of the Document Link & Imaging covers adding and editing the links from master records. The example will focus on two master records, Jobs and Employees. When the record is complete or satisfactorily edited, either click on the Save 🔄 button or press Ctrl-S to save the changes.

New Link

When initially accessing Document Link from an existing job master record, the menu opens the Document Link - Job form. The form is used to enter new group and document information (and access previously linked files).



Accessing Existing Links

The list of existing document links may be examined by opening a master record or transaction with links and clicking on the Document Link paperclip icon on the toolbar (at the top of the screen).

To edit existing links, right-click on the item of interest, and select the desired action from the pop-up menu options.

Figure: DL-2 Pop-up menu after rightclicking on an existing document link.

Add Group	
Add File	
Add F <u>o</u> lder	
<u>S</u> can a New Doo	ument
<u>R</u> emove	
Expand	
C <u>o</u> llapse	

Figure: DL-3

Document Link sample screen showing existing documents that can be edited.

🖻 Document Link - Job Number - 1010	
	File Name 110-1041_IMG.JPG
GRS-IBS SPECIFICATIONS.PDF	Location D:\PROJECT DOCUMENTATION\JOB 1010 - TRUESDALE ELEM. SCH\
110-1045_IMG.JPG	Description
I10-104_JMG.JPG IOUSOF FAMILING PLAN A.JPG SCAVATION PICTURE 1.BMP EXCAVATION PICTURE 2.BMP EXCAVATION PICTURE 2.BMP	Notes
JOHN DEERE 300D_T DUMP TRUCK.BMP	Preview
+ - 2	Group Document » Remove Open
	Save Glose

Folder/File Tree

The left portion of the screen has a Folder/File tree similar to what is available in Windows Explorer[®]. It shows the two or three primary linked elements: Groups or Folders, and Files. In the example shown in Figure: DL-3, the groups are Specifications, Pictures, and Equipment.

Expand Button

+ As with other sections of BIS[®], the folder/file tree can be expanded by using the plus button icon.

Collapse Button

Similarly, the list can be collapsed by clicking on the minus button icon.

Figure: DL-4	🖻 Document Link - Job Number - 1010		- • •		
Document Link sample screen showing collapsed folder tree.		Group Id SPECIFICATIONS Description Specifications			
	+ - 2	Group Document * Delete Gro Save			

Refresh

The folder and file listing can be updated by using the Refresh button icon.

Group Id

The Group Id field appears in the upper right section of the screen and serves two purposes:

- 1. It lists the name of the Group Id being highlighted in the Folder/File tree to the left.
- 2. For a new Group, the name, consisting of 20 or less alpha or numeric characters is entered in the field. The Search tool icon a be used to use a Group name that has been created.

Description

For new Groups, enter a description for the group. For existing groups, the name will be seen in this field.

Notes

For new Groups, enter an optional note in this field. For existing groups, the notes will be visible in the field.

Open With

The Open With choices are only available if the cursor focus is on a graphics file rather than a different file type, a group, or a folder in the folder/file tree. When the focus is on a graphics file, the choices are BIS[®] or Default Application. The default application would be an installed graphics application program associated with the particular graphics file selected.

Preview

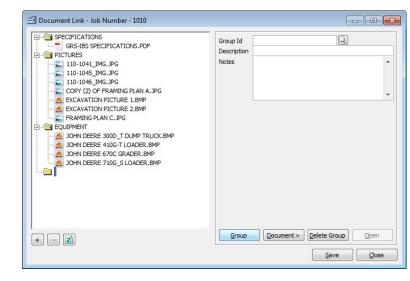
When the selected link is to a graphics file, a preview will appear in the Preview window.

Group

Clicking on the Group button allows the creation of a new group of documents. Note that a new empty folder will be added to the tree to the left.

Figure: DL-8

Document Link sample screen showing new unnamed group.



Document

The document button offers three choices:

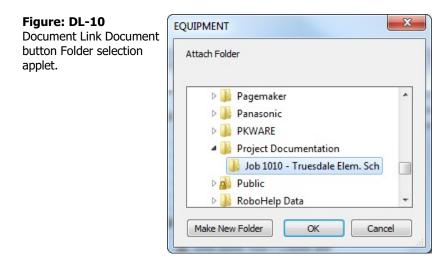
1. File

This choice opens a Windows Explorer applet that enables the user to search and select the file to be linked in the group. Simply highlight the file and click to select it.

Figure: DL-9	EQUIPMENT					×
	Look in:	길 Job 1010 - True	esdale Elem. Sch	•	G 🗊 📂 (
Document Link Document button File selection applet.	Look in: Recent Places Desktop Libraries Computer	Name 110-1041_IM 110-1045_IM 110-1046_IM Copy (2) of G Excavation P Excavation P Framing Pla	Date 3/25/2002 1 3/25/2002 1 3/25/2002 1 12/11/2002 11/22/2002 3/25/2002 1 3/25/2002 1 3/25/2002 1 3/25/2002 1 3/25/2002 1 3/25/2002 1 3/25/2002 1 5/2/2006 8 5/2/2006 8 5/2/2006 8	Type JPEG image JPEG image	Image: Size 1,463 KB 1,308 KB 1,308 KB 1,426 KB 15 KB 670 KB 674 KB 79 KB 791 KB 44 KB 49 KB 54 KB 38 KB	Tags
	Network		John Deere 300d_ All Files	t Dump Truck.bm	qı T	Select Cancel Code Page

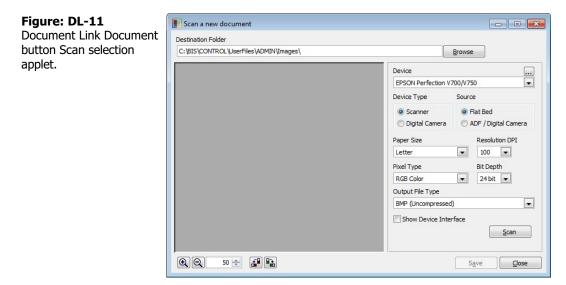
2. Folder

This choice opens a Windows Explorer applet that enables the user to search and select the folder to be linked to the record. Simply highlight the folder and click on the OK button to select it.



3. Scan a New Document

This selection opens the scanning functionality pre-existing on the computer. The functions of the screen are covered in the following section.



Delete Group

The button appears only if the focus is on a group or folder. It allows the user to delete a group, but only if the group has no linked files with it. A message will appear if the Delete Group button is chosen before the group is empty.

Remove

The button appears only if the focus is on a linked file within a group. It allows the user to delete the selected link from the group. The button will be inaccessible if the focus is on a file within a folder.

Open

This button allows the user to open the selected file, but only if the file is associated with an installed program.

🄍 Tip

Be certain that the program needed by the file is installed or available on the workstation being used to access it. Files with no association can be linked, but cannot be accessed on workstations without the associated program.

Save the Changed Record

When the document links are complete or satisfactorily edited, clicking on the Save button will save the changes.

Close

Clicking on the close button will close the screen, saving no changes since the last save.

Section 3 – Scan a new document

The "Scan a new document" window contains functionality that permits users to activate installed scanning equipment or access a digital camera.

Destination Folder

The program will use its default program location, but the user can change it by entering it directly or by using the Browse button.

Device

This line lists the image devices available to the computer. The drop-down tool can be used to see and select the available devices.

Device Type

Two radio buttons offer the choice of Scanner or Digital Camera. The choice of this selection controls the next set of buttons

Source

Two radio buttons offer the choices of Flat Bed or ADF/Digital Camera. If the Device Type selected is Scanner, either of the Flat Bed or the ADF/Digital Camera selections is available. If the Digital Camera Device Type was selected, then the ADF/Digital Camera is the only selection available.

The terms "Flat Bed" and "ADF" both refers to scanners. ADF is the acronym for Automatic Document Feeder. Please note that both an automatic document feeder scanner and a digital camera potentially will have multiple images from which to select. A flat bed scanner will only have one image at a time.

Paper Size

The paper size refers to the available paper sizes for the scanning device. The selections are: Letter, Legal, A4, B5, and A5.

Resolution DPI

The Resolution DPI (Dots Per Inch) refers to the size and detail of the image to be scanned. The available choices are 75, 100, 150, 200, and 300.

Pixel Type

The Pixel Type refers to the type of image. The available choices are: Black and White, Gray Scale, RBG Color (where RBG refers to Red, Blue, and Green), and Palette Color.

Bit Depth

The Bit Depth refers to the detail of the image to be scanned.

Output File Type

The Output File Type refers to the file types in which the scanned image may be saved. The available choices are:

Black & White

Bit Depth: 1 bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- TIFF (Uncompressed)
- TIFF (CCITTRLE)
- TIFF (Group 3-1D)
- TIFF (Group 3-2D)

- TIFF (Group 4)
- TIFF (Packbits)
- PNG
- PCX

Grayscale

Bit Depth: 4 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- TIFF (Uncompressed)

Grayscale

Bit Depth: 8 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)

RBG Color

Bit Depth: 24 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)
- TIFF (Packbits)

RBG Color

Bit Depth: 36 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- TIFF (Uncompressed)
- TIFF (Packbits)

Palette Color

Bit Depth: 4 Bitt

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- TIFF (Uncompressed)

Palette Color

Bit Depth: 4 Bit and 8 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)

- TIFF (Packbits)
- PNG
- PCX
- TIFF (Packbits)
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX

- TIFF (Packbits)
- PNG
- PCX
- TIFF (Packbits)
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX

Show Device Interface

This option allows the program interface of the selected device to be displayed on the screen.

Scan

This button activates the selected scanning function. When the scanning function is activated, the computer's scanning program will be activated.

Figure: DL-12

Example of a scanning

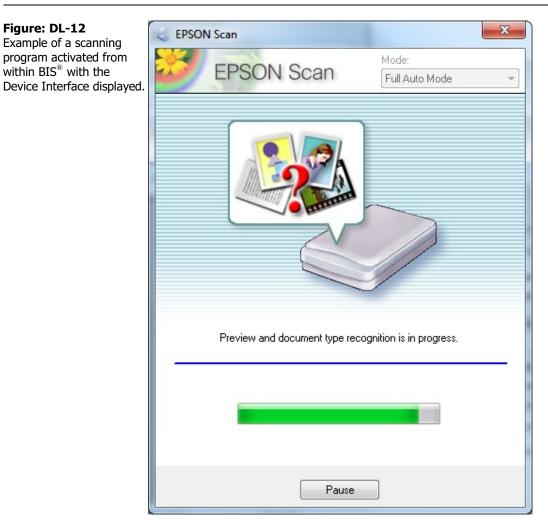


Image Controls

🔍 Zoom In

The Zoom In button enables the user to enlarge the image.

Q Zoom Out

The Zoom Out button enables the user to decrease the image size.

50 🗢 Zoom Setting

The Zoom Setting field enables the user to set the percentage of enlargement or reduction of the image size.

🔳 Rotate Left

The Rotate Left button enables the user to rotate the image 90° counterclockwise.

🔁 Rotate Right

The Rotate Right button enables the user to rotate the image 90° clockwise.

Figure: DL-13

Example of a scanning process activated from within BIS[®].

Scan a new document estination Folder		
C:\BIS\CONTROL.\UserFiles.\ADMIN\Images.\		Browse
	Device	
	EPSON Perfection V7	
	Device Type	Source
CONTRACTOR'S APPLIC. Application is made for payment, as st Continuation Sheet, AIA Document G 1. ORIGINAL CONTRACT SUM 2. Net change by Change Orders 3. CONTRACT SUM TO DATE (Line 1 ± 4. TOTAL COMPLETED & STORED TO E 5. RETAINAGE: a% of Completed Work (Column D + E on G703) b% of Stored Material (Column F on G703)	 Scanner Digital Camera 	 Flat Bed ADF / Digital Camera
ACTOR'S APPL is made for payment, a 1 Sheet, AIA Documen CONTRACT SUM ge by Change Orders T SUM TO DATE (Line MPLETED & STORED I E: E: MPLETED & STORED Work m D + E on G703) % of Stored Material m F on G703)	Paper Size	Resolution DPI
SFC HACEO	Letter	▼ 100 ▼
OR'S AP de for payme et, AIA Docu IRACT SUM . Change Orc Change Orc Stored Mater Stored Mater Stored Mater	Pixel Type	Bit Depth
	RGB Color	▼ 24bit ▼
) Aat To FE O Moor	Output File Type	
eria (13) War RE Li de la marte (13)	BMP (Uncompressed)	•
CONTRACTOR'S APPLICA Application is made for payment, as she Continuation Sheet, AIA Document G7 1. ORIGINAL CONTRACT SUM 2. Net change by Change Orders 3. CONTRACT SUM TO DATE (Line 1 ± 2 4. TOTAL COMPLETED & STORED TO D) 5. RETAINAGE: a% of Completed Work (Column D + E on G703) b% of Stored Material (Column F on G703)	Show Device Inter	face <u>S</u> can
2Q 50 + FB		Save Close

Save

When the scan and settings are complete or satisfactorily modified, clicking on the Save button will save the changes. The user will be offered a Save As screen to place the saved file in a designated location, and give it a distinctive name.

Figure: DL-14 Saving and naming the scanned document.	Save As Save in:	Images	•	G 🜶	 ×
	Desktop Libraries Computer Other Network	IMAGE001.BMP	mage002.bmp Bitmap (*bmp)		▼ Save ▼ Cancel
					Code Page

The resulting image is then available for a preview, or it can be opened for a large screen examination.

Figure: DL-15	🖻 Document Link - Job Number - 1010	
Scanned image shows in	SPECIFICATIONS PICTURES	File Name IMAGE002.BMP
the Preview window.		Location C: \BIS\CONTROL\USERFILES\ADMIN\IMAGES\
	IMAGE002.BMP	Description
		Notes A
		Open With BIS Default Application
		Preview
	+ - 2	Group Document » Remove Open
		Save Close

Close

Clicking on the close button will close the screen.

Section 4 – Document Link to a Transaction

Using the methods already described, documents can be linked to transactions. The following is an example of linking the scanned image of a vendor invoice to the invoice entry in Accounts Payable.

The invoice is entered normally in Vendor Invoices and then saved.

Figure: DL-16 Entry of invoice into AP Vendor Invoices.	Vendor Invoice		P Account	-						
	Vendor Id	0201	Q	BK Contr	acting	Reference Num	ber	Γ		
	Invoice Number	01.0914			On Hold for Payment	Retention %	0.00	\$		0.00
	Invoice Date	09/05/14	-			Due Date			10/05/14	-
	Payment Terms	NET 30		Q		Discount Date			11	-
	Purchase Order		Q	1		Discount %	0.00	s		0.00
	Amount	12	250.00	Close Pur	chase Order					
	GL Account	Item N	lumber		nits Unit Cost	Discount 9	6	Am	ount	
	▶ 5020	Q.	0	1	0.110 0000	bibcounte y		7 41	1,250.00	в
		Q	Q,							
							-			
							_			_
							-			-
										•
	Account Name Item Description On Hand 0.00	Cost of Cont Last Unit 0.00000	Cost			Cost Code Ch 02700 erage Unit Cost 00000	hange Or	der	Cost Typ Subcont	
		.0		Payable-T		Total			50.00 Pay	

Clicking on the Attached Documents I paperclip icon opens the Document Link – Vendor Invoices function. It may be necessary to create a new Group. This selection could be based on the job, vendor, or some other organization.

Figure: DL-17	🖃 Document Link - Vendor Invoices - 01.0914 - 0201 - 09/05/1	.4		- • •
Create new Group for invoices.		Group Id Description Notes	10 10 INVOICES Job 10 10 Invoices	
	+ • 2	Group		<u>Group</u> Save

Then scan the actual invoice document.

Figure: DL-18 Scan the document, Showing the Device Interface.	Scan a new document		
	Destination Folder C:\BIS\CONTROL\UserFiles\ADMIN\Images\		Browse
		Device	
		EPSON Perfection V	700/V750
		Device Type	Source
		 Scanner Digital Camera 	 Flat Bed ADF / Digital Camera
		Paper Size	Resolution DPI
		Pixel Type	Bit Depth
		RGB Color Output File Type	✓ 24 bit ▼
		BMP (Uncompressed	0
		Show Device Inte	·
		I	Save Close



The scanned document shown in the preview of the BIS[®] scan function.

Scan a new document Destination Folder C:\BIS\CONTROL\UserFiles\ADMIN\Images\			Browse
BK Contracting	·	Device	
BK Contracting	=	EPSON Perfection V7	°00/V750 💌
16701 Douglas Way		Device Type	Source
		Scanner	Flat Bed
Oceano, CA 93455		Digital Camera	ADF / Digital Camera
		Paper Size	Resolution DPI
(805) 534-7000		Letter	▼ 100 ▼
(805) 554-7000		Pixel Type	Bit Depth
		RGB Color	▼ 24 bit ▼
September 5, 2014		Output File Type	
		BMP (Uncompressed))
Invoice# 01.0914	Terms: 2%	Show Device Inter	face
			Scan
<	*		
		1	Save Close

The image is saved, and the link is saved.

Thereafter, the actual invoice image is available to other users (with access rights) for review by accessing the transaction record, clicking on the Document Link paperclip icon, and opening the linked image, either using BIS[®] or the associated application. It may be printed from the application that opens the file.

Figure: DL-20 Accessing the scanned,

saved image of the invoice.

1010 INVOICES IMAGE003.BMP	File Name IMAGE003.BMP
	C:\BIS\CONTROL\USERFILES\ADMIN\IMAGES
	Notes
	Open With BIS Default Application
	Preview
	en ante Vice Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante Ante
+ - 0	

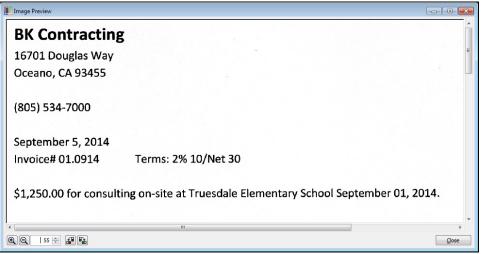


Figure: DL-21 The scanned, saved image, viewed on the screen and printed.

Section 5 – Administrator – Attached Documents

This form displays all the documents attached to forms using the BIS[®] Document Link & Imaging system. Check a document and click Open or Remove to view or delete the document.

Attached Documents - Menu Access

Administrator | Attached Documents

Figure: DL-22 System Attached Documents screen form.

*	Document	Folder	From	Id	
	110-1041_IMG.JPG	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	110-1045_IMG.JPG	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	110-1046_IMG.JPG	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	8
	COPY (2) OF FRAMING P	D: PROJECT DOCUMENTATION JOB 1010	Job Number	1010	
		D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	EXCAVATION PICTURE 1	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	EXCAVATION PICTURE 2	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	8
	FRAMING PLAN C. JPG	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	GRS-IBS SPECIFICATION	D:\PROJECT DOCUMENTATION\JOB 1010	Job Number	1010	
	IMAGE002.BMP	C:\BIS\CONTROL\USERFILES\ADMIN\IMA	Job Number	1010	
	IMAGE003.BMP	C: \BIS \CONTROL \USERFILES \ADMIN \IMA	Vendor Invoices - 01.09	000054	
	3				

*

This column is used to mark the documents that are to be removed from the system. Clicking on the box of the designated line in the column will enable the document link to be removed.

An "X" in the next column indicates that an entire folder (not a file) has been linked.

Document

This column displays the document file name.

Folder

This column displays the path to the folder that contains the file listed.

From

This column displays the source of the record displayed.

Id

This column displays an identification number associated with the source record.

Open

The Open button enables the selected document to be opened by its associated program. If the Open button is used on a folder, thumbnail images of all of the documents in the folder will be displayed (if set as the default).

Figure: DL-23

Display of thumbnail images of files with an attached folder.

								X
JOB 1010 - TRUES 🕨 EQUIPME	NT		▼ 49	Search EQL	IIPMENT			Q
File Edit View Tools Help								
Organize 🔻 Include in library 👻 Share w	vith •		Slide show	w Burn	»]	?
Computer Comp		*	Jo Bi 48	hn Deere 300 ruck.bmp tmap image hn Deere 410 tmap image 3.1 KB hn Deere 670 III	g-t Load	er.bmp	• III •	ct a file review.
4 items								

Remove

The Remove button will delete the link to the document that had been established. It is important to note that the underlying document is NOT deleted; just the link is removed.

Close

Clicking on the close button will close the screen.

Section 6 – Google Maps®

If the computer on which BIS[®] with the Document Link & Imaging module license has access to Google Maps[®] the Mapping icon will be visible on the toolbar.

With a record showing an address on the screen, simply click on the Mapping Toolbar button in BIS[®] and Google Maps[®] automatically displays map information from the selected address in BIS[®].

Figure: DL-24	📑 Jobs - 1010 True	sdale Elementary	School			
Sample record with and	Main Default O	wner <u>A</u> rchitect	<u>T</u> & M Markup E	ayroll <u>H</u> istory	Udf Notes	
address.	Main Default Q Job Number Job Name Job Name Street Address 1 Street Address 2 City State Zip Code Telephone Fax Contract For Contract For	wner Architect 1010 Truesdale Elemen 4790 N. Broadwa Arroyo Grande CA Q. Califorr 93420 (805)543-7000 (805)543-7000 (805)34-1595 Remodel 100	tary School Y	2ayroll History	Udf <u>Notes</u> Job Status Date Completed	Active
	Contract Date Project Manager SQ.FT. of Building Edit	01/27/13 Bill Johnson 3,000]		

Click on the Mapping icon on the toolbar. If the address cannot be completely identified, a map of the general area will be displayed.

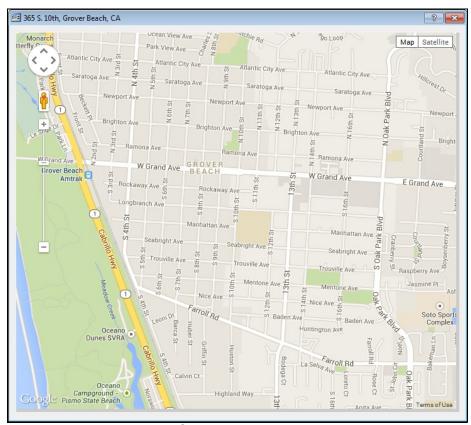


Figure: DL-25 Google Maps[®] is open with Find sub-screen to assist with locating specific address.



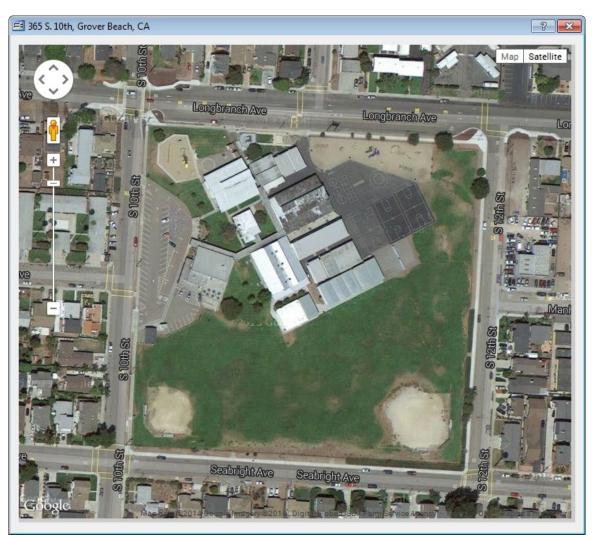


Figure: DL-26 Google Maps[®] map showing selected location.

🄍 Tip

Google Maps[®] can be displayed in Map or Satellite views.



System Wide Parameters includes a setting to allow using Microsoft Map Point[®].

Section 7 – Word[®] Mail Merge

The BIS[®] Document Link module allows users to create a mail merge from within BIS[®]. The process can use most existing master record lists already stored in BIS®. Items like bid requests and employee notices can be specifically created for those companies and people. With a master record open, the Word[®] III icon is available. Clicking on the icon opens the BIS[®] Mail Merge screen.

Figure: DL-27 New Mail Merge screen form.	Mail Merge	
		Merge
		▼Close

New

Clicking on the New button opens the New File Document window into which the file name is entered.

Figure: DL-28

New File Document screer form into which the file name is entered.

🖻 New File Document	? 🔀
File Name	
Truesdale Elementary School Bid Request L	etter
	QK <u>C</u> ancel

Clicking on the OK button will save the name and open Microsoft® Word®. Clicking on the Cancel button will close the screen without opening Word®.

🗑 🖬 🤊 - O 🛛	1 🖨 🗋	-	٦	Fruesdale Eler	mentary S	ichool Bid F	Request Lette	er.doc - Microsoft V	Vord					• X
File Home	Insert	Page Layou	ut Refere	ences Ma	ilings	Review	View							۵ 🕜
Envelopes Labels Create	-	Select Recipients * Re Start Mail Merg		Highlight Merge Field		Greeting Line Write & In:	Insert Merge Field + sert Fields	Rules 👻 🔮 Match Fields	Preview Results	Find Aut	1 d Recipier o Check f r Results		Finish & Merge * Finish	
	• • • 2 •		1	2 .	* * 1	3 .		· 4 · · · · · · · · · · · · · · · · · ·	· · · 5 · ·		· · 6 ·	· · · <u>}</u> ·	7 .	
-						III	1							* 0 7
Page: 1 of 1 Word	ds: 0										通 🗐 1	.10% 😑		+ .:

Figure: DL-29 New, blank document opened in Word[®].

Create the document in Word[®].

Sep	tember 5, 2014
Bid	Department
To:	
	t Construction is currently accepting bids for the <u>Truesdale</u> Elementary School renovation project. Al
	; are due by the close of business, 5:00 p.m. PST, October 1, 2014 at our office at 1200 Main Street, byo Grande, <u>California</u> 93420. Bids may be delivered by hand, by mail, via facsimile to 805-534-1595,
	we mail attachment to <u>bids@bestconstructiononline.com</u> .
The	project scope includes unique renovations in several areas including, but not limited to Demolition,
Pav	ing and Surfacing, Site Improvements, Landscaping, Finish Carpentry, and Electrical.
All	oids must be complete and final.
Ver	y truly yours,
Bes	t Construction Company
Wil	liam Johnson
Pre	sident
Enc	losures

Figure: DL-30 Mail merge document prior to the insertion of the merge fields.

Adding Merge Fields

Using the Insert Merge Field icon in Word[®], open the Insert Merge Field window. Two types of fields are available, Address Fields and Database Fields. Use the Database fields only.



When selecting fields to merge, use ONLY the Database Fields.

Figure: DL-31	Insert Merge Field
Insert Merge Field selection box showing Database Fields. The fields	Insert:
displayed came from the BIS [®] source file.	vendorid name
BIS [®] source file.	status phoneday phonenight fax email city state zipcode addr 1 addr 2 minority women
	License T Match Fields Insert Cancel

The fields displayed come from the record in BIS®. Those displayed in the example come from the Vendor Master Record.

With the cursor on the correct location in BIS[®], select the field(s) needs needed.

Best Construction is currently accepting bids for the Truesdale Elementary School

▲ Caution

It is beyond the scope of the manual to discuss all of the features and functions available within the Word[®] Mail Merge feature. Such functions could include conditional fields, or eliminating lines or spaces if fields in particular documents contain no data.

Save the completed template document in Word[®].

Edit

The Edit button is used to open an existing merge document. Select the document from the list, and click on the Edit button. Word[®] will open the source merge document, and it can be edited as described above.

Add

The Add button is used to add a source document from a list of those available. Once selected, Word[®] will open the added source merge document, and it can be edited as described above.

Remove

The Remove button is used to remove a source document from the list of those available.

Merge

Return to the BIS[®] Mail Merge screen form. With the document highlighted, the merge process will be initiated by clicking on the Merge button. It opens a report-style query screen.

Report Types Mail Merge

Only the Mail Merge Report Type is available for the selected master record. For the example, the Vendor File master record information is discussed.

Document

This drop-down list will show all of the previously created merge documents from which to choose the current merge.

Order By

- Vendor Id
- Vendor Id Numeric
- Vendor Name
- Vendor Status
- City
- State
- Zip Code
- Day Telephone
- Cost Code
- Vendor Type

Options

- Active
- Inactive
- Union Vendors
- Non-Union Vendors
- Minority Owned Business Enterprise
- None-MOBE
- Women Owned Business Enterprise
- None-WOBE
- 1099 Vendors
- Non-1099 Vendors
- Case Sensitive

Fields

- Vendor Id
- Vendor Name
- City
- State
- Zip Code
- Day Telephone
- Cost Code
- Vendor Type

Merge Button

Use this button to activate the merge with the filter criteria set in the Query screen. When the button is used, a message will appear that Word[®] is being started. The result will be the merged document.

Close Button

Clicking on the close button will close the screen.

Merged Word[®] Document

Septer	nber 5, 20	014		
	partment I Coast B	: uilding Supply		
3987 H Pismo	Septen	nber 5, 2014		
To: Ce		bartment tracting September 5, 2014		
Best C bids au Arroyc or by e	To: BK	Bid Department Nagel Foundations 6800 Oak Park Blvd. Arroyo Grande, CA, 93420		
The pr Paving All bid	Best C bids ar Arroya or by e	To: Nagel Foundations		
Very t Best C	The pr Paving All bid	Best Construction is currently accepting bids for the Truesdale Elementary School renovation bids are due by the close of business, 5:00 p.m. PST, October 1, 2014 at our office at 1200 M Arroyo Grande, California 93420. Bids may be delivered by hand, by mail, via facsimile to 8 or by email attachment to <u>bids@bestconstructiononline.com</u> .	Main Street,	
Willia Presid Enclos	Very ti Best C	The project scope includes unique renovations in several areas including, but not limited to Paving and Surfacing, Site Improvements, Landscaping, Finish Carpentry, and Electrical. All bids must be complete and final. Very truly yours,	o Demolition,	
	Willia	Best Construction Company		
	Presid Enclos	William Johnson		
		President Enclosures		

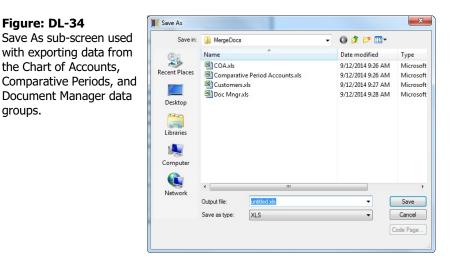
Figure: DL-33 Three of 15 Word[®] bid request letters merged with selected subcontract vendors.

groups.

Section 8 – Excel[®] Export

The BIS[®] export to Excel[®] feature can be a powerful tool in enabling users to use valuable data in other ways in spreadsheets. The feature works from most master records, but not from any transactions.

With a master record open, the Excel[®] 🔳 icon is available on the right side of the main toolbar. Depending on the source master record, clicking on the icon opens either of two BIS[®] export screens. For Chart of Accounts, Comparative Periods, and Document Manager, the Excel® export process opens a simple Save As sub-screen to determine the name and location of the file.



The resulting spreadsheets created for these three data groups will include all available fields.

Fi	le Home	Insert Page Layout Form	ulas Data	Revie	ew View										۵ 🕜	- #
Pas	- Ga				📑 Wrap Text 📴 Merge & C	enter	Gene	% • €20 .00 Condition		Cell		elete Format	Σ AutoSu		ort & Fi	
-	ooard 5	Font 5		Alianmer				Number G	g * as Table * Styles	Styles *	*	ells	Q Clear *	Editir	ilter + Se	elect *
Clipi				Alignmer	nt		а –	Number	Styles			.ells		Editii	ng	
_	A1	J= docount								-						
1	A	В	С	D	E	F	G	Н	1	J	K	L	M	N	0	P
		desc			t treeorder							linebelow	cashflow	right	action	image
_	1000000000		Description	N	1	-	0_	Total Assets	Center	FALSE	FALSE	None		1	1	
3	1001000000	Current Assets	Description	N	2	3_	1_	Total Current Assets	Left	FALSE	FALSE	None		1	1	
4	1010000000	Cash	Description	N	3	4_	3_	Total Cash	Left	FALSE	FALSE	None		1	1	
5	1015000000	Petty Cash	Transaction	N	4	5_	4_		Left	FALSE	FALSE	None		1	1	
6	1020000000	Cash In Bank	Transaction	N	5	6_	4_		Left	FALSE	FALSE	None		1	1	
7	1030000000	Cash In Bank-Savings	Transaction	N	6	7_	4_		Left	FALSE	FALSE	None		1	1	
8	1040000000	Cash In Bank-Money Market	Transaction	N	7	8	4		Left	FALSE	FALSE	None		1	1	
9	1100000000	Accounts Receivable	Description	N	8	9	3	Total Accounts Receivable	Left	FALSE	FALSE	None		1	1	
10	1110000000	Accounts Receivable-Trade	Transaction	с			9		Left	FALSE	FALSE	None		1	1	
11	1120000000	Accounts Receivable-Retention	Transaction	С		11	9		Left	FALSE	FALSE	None		1	1	
2	1130000000	Accounts Receivable-Other	Transaction	N		12	-		Left	FALSE	FALSE	None		1	1	
2	1140000000	Accounts Receivable Suspense	Transaction	N		223	_		Left	FALSE	FALSE	None		1	1	
.3		/ 22 /						∏ 4 [•

Figure: DL-35 Partial sample Excel[®] spreadsheet created from the export of the Chart of Accounts.

For all other available data groups, two elements are necessary to export data for an Excel[®] export: Selection of the fields, and the conditions for the selection of data. Of the two, the selection of the data fields is most important. Without a specific selection of conditions, the program assumes that all conditions are appropriate.

Figure: DL-36

With the Customer master record open, the Excel[®] Mail Merge button opens the Export Customers Data screen form.

onditions Select	Fields					
ile Name	Customers				1	
estination Folder	D:\1140.31\CONT	ROL\USERFILES\ADMI	N/		Brow:	se
Fie	ld	Operator	Beginning	Ending	Join	-
Þ	-					
						_
						_
-						_
-						-
				1		-
-				8		-
						-
-						-
						-
						-
						-
						-
3 I)						_

Conditions Tab

The Conditions tab of the Export Customers Data screen form enables the user to identify the conditions applicable to fields used in the selection of the items to be exported. Note that the field conditions do not need to be the same as those selected for export.

If a different Destination Folder is desired, it may be entered manually. Alternatively, clicking on the Browse button will open an Explorer[®] applet to enable selecting a pre-existing folder.

Figure: DL-37 Select Folder applet to choose folder location of	Select Folder Destination Folder	x
exported data.	4 1140.31	
	CONTROL	
	DEMO_OLD	
	hbp081114	
	MergeDocs	
	📙 RW	
	TEST02	
	TEST03	
	li Test20140812	-
	ОК Са	ancel

Field

This column is used to select the field whose conditions need to be set for the selection of data to be exported.

Figure: DL-38 Field drop-down windows showing the field names and descriptions.

Field	
	-
	•
MSTCF - Amt Due	
MSTCF - City	
MSTCF - Credit Limit	
MSTCF - Customer Id	
MSTCF - Customer Name	2
MSTCF - Customer Type	-

Operator

The operator is the logical filter that will be applied to the data selected and applicable to the ranges set in the following columns. In most cases, the following operators will be available:

- (None)
- Equal to
- Between
- Tag
- Less than
- Greater than

Beginning

The Beginning column is used for entry or selection of the first record in a range of data on which the Operator works. If the Operator refers to a single item, it will be listed here.

Ending

The Ending column is used for entry or selection of the last record in a range of data on which the Operator works. If the Operator refers to a single item, the field will be empty.

Figure: DL-39

Sample Conditions selections of customer data for Export.

	ustomers					
Destination Folder C Field	:\1140.31\	CONTROL WERGEDOCS		To dia a	Browse	1000
MSTCF - Customer Id		Operator Between	Beginning C001	Ending C003	Join	1
		-	100 C 10			
-						
-						
-					_	
-						
-						
						-

Join

The Join column allows two or more fields, and their operators, to act together. The choices are And and Or, and they follow the standard rules of logical operators.

Insert Line

The Insert Line button allows the user to add a Field line above an existing field line in the Conditions tab screen form. The feature can be important especially if Join operators must act in a particular fashion.

Delete Line

The Delete Line button allows the user to remove a Field line highlighted by the cursor in the Conditions tab screen form. The feature can be important especially if Join operators must act in a particular fashion. If a line is to be deleted, the system will ask for confirmation.

Export

Clicking on this button will export the selected data to the destination folder.

Close

Clicking on the close button will close the screen.

- Less than or equal to
- Greater than or equal to
- Not equal to
- Not between

Select Items Tab

The Select Items tab of the Export Customers Data screen form enables the user to choose the fields to be exported. Note that the items show both the field name and its description.

Simply click on a box in the Include column to have that data, according to the selection criteria of the Conditions tab, available for export. If fields were previously chosen that should be excluded, click on the box again to remove the checkmark.

ple Select Items en form for Customer	Conditions Select Fields	
ster record.	Include Field	*
	MSTCF - Amt Due	
	MSTCF - City	
	MSTCF - Credit Limit	
	MSTCF - Customer Id	=
	MSTCF - Customer Name	
	MSTCF - Customer Type	
	MSTCF - Date Account Closed	
	MSTCF - Date Account Opened	
	MSTCF - Default Sales Account	
	MSTCF - Discount Level	
	MSTCF - E-Mail	
	MSTCF - Fax	
	MSTCF - Last Invoice Number	
	MSTCF - Last Payment Amount	
	MSTCF - Last Payment Date	
	MSTCF - Last Statement Date	.

Figure: DL-41 Selected customer data export into an Excel[®] spreadsheet.

ſ	😰 📴 🔹 🖓 👻 🖓 🗢 🛛 Customers.xls [Compatibility Mode] - Microsoft Excel										
	File Home Insert Page Layout Formulas Data Review View 🛆 😮 🗆 🗟 🔀										
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $										
				~							
	_	A1	▼ (°	∫x city			1			1	_
	1	A	В	С	D	E	E F		G	H	
	1	city	customerid	name	typecustom	state	addr1		addr2	zipcode	
	2	Los Angeles	C001	Far West Properties	1	CA 1625 Parker Stre		Street		90001	
	3	Atlanta	C002	Harmon Brothers	2	GA 5400 Peach Stre		Street		30301	
	4	San Luis Obispo	C003	San Luis Obispo County	1	CA	1825 Market Street			93401	-
	14. 4	Customer	rs 🖄		1) ▶[
	Ready I I 100% O O										

Index

Α	
Administrator	DL-15
	<u></u>

В

-	
beginning.	
bit	DL-8, DL-9
BMP	
	,

С

centralize support filesDL	-1
collapseDL	
colorDL-8, DL-	-9
conditionsDL-25-2	28

D

destination.	
device	
digital cameras.	
	DL-1, DL-2, DL-1, DL-3-8, DL-11-13, DL-15-17, DL-19-23, DL-25

E endir

ending	DL-27
expand	DL-4
export	<u>)L-1, DL-25-28</u>

F

file	DL-1, DL-4-8, DL-11, DL-13, DL-15, DL-19, DL-21, DL-22, DL-25
	<u>DL-9</u> <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}</u> , <u>DL-10</u> , <u>DL-10}, <u>DL-10</u>, <u>DL-10</u>, <u>DL-10}, <u></u></u></u></u></u></u></u></u></u></u></u>

G

grayscale	<u>DL-9</u>
group	<u>DL-3</u> , <u>DL-5-8</u> , <u>DL-12</u>
I Id interface.	<u>DL-1, DL-5, DL-15, DL-19, DL-22, DL-23</u> <u>DL-1, DL-9, DL-10, DL-13</u>

J

join <u>DL-27</u>	
JPEGDL-9	

М

mail merge	DL-1, DL-19-22,	DL-26
map	<u>DL-1, DL-17</u> ,	DL-18

0

Open With	DL-5, DL-17
operator	
order	DL-22

Ρ

palette.	
PCX	
pixel	
PNG.	
preview.	
	$\frac{DU}{DU}, \frac{DU}{DU}, \frac{DU}{DU}$

R

RBGDL-8, DL-9
Refresh
remove
Resolution
rotateDL-10

S

satellite	DL-18
scan	DL-7-9, DL-11, DL-13
Source	
_	
T	
template	<u>DL-1, DL-21</u>

TIFF.	DL-8, DL-9
Z	
Zoom	<u>DL-10</u>