AUTODOC HSE

Reference Manual

Installation

Configuration

Processes

Troubleshooting

AutoDoc HSE

Reference Manual

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While we endeavour to provide high quality, up-to-date documentation for our products, please be aware that we regularly improve our software according to the expressed needs of our customers. As such, functionality of the software may differ from that described in our documentation. As always, we recommend that you thoroughly test your chosen configuration to ensure it meets your needs, prior to employing the configuration in a production environment.

This document has 249 pages. Please consider the environment before printing.

AutoDoc HSE aids in the production of electronic communication, especially PDF files. PDF files, like this one, provide a convenient, standardised form of electronic communication, which help to reduce our reliance on paper resources.

Table of contents

Introduction

This chapter introduces what AutoDoc HSE does and how it does it, as well as providing some guidelines on using this reference manual.

This chapter contains the following sections:

- AutoDoc HSE in a nutshell

- Using this reference manual

AutoDoc HSE in a nutshell

AutoDoc HSE is essentially a peripheral tool which is incorporated into your existing processes to streamline and automate the delivery of documents that you currently handle manually or electronically through a number of steps. For example, statements which you currently produce using an accounting application, and print and subsequently fax to recipients, can now, with the addition of AutoDoc HSE, be faxed (and/or e-mailed/archived/printed) from the one single 'print' operation.

AutoDoc HSE behaves as a virtual printer driver which, upon receiving an instruction to print a document, interprets that document's content to establish what delivery method(s) and associated options should be applied, and performs the delivery accordingly.
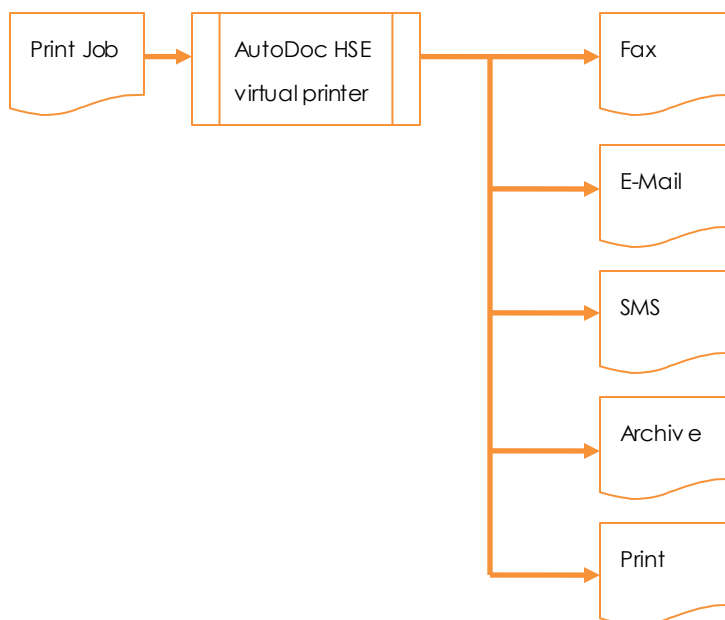
FIGURE 1 - depicting the processing of a print job, via the AutoDoc HSE virtual printer, into delivered documents.

That's what AutoDoc HSE does, in a nutshell, but the nutshell quickly becomes full – extra/advanced features include options such as database integration, creating labels, XML files, drag'n'drop PDF creation, working with barcodes, integration with third party applications, and more.

The document content which triggers a response from AutoDoc HSE is effectively 'encoded' using a simple method which can be hidden from the user – the font colour of text in the document. For example, AutoDoc HSE can be configured to treat any text with a white font colour (which is invisible to the user on a white background), and any text with a 'not-quite-black' font colour (which still appears as normal black text to the human eye), as content to which it must respond. The

section on "Font colour" in Chapter 3 provides more information on how colour is used.

The chief advantages of the AutoDoc HSE system are:

- The end user can be completely oblivious to how the system works. If a user knows how to print a document, that user can successfully use AutoDoc HSE to achieve powerful document delivery.

- Availability of a large number of extensively configurable delivery option combinations (up to 99, depending on your version of AutoDoc HSE).

- Simplicity of installation (especially in a network environment).

- Wide spectrum of compatibility and ability to leverage your existing IT infrastructure – including many word processors, databases, and spreadsheet and accounting applications.

Using this reference manual

This manual is divided into chapters based on the workflow of the process of installing, understanding, setting up and using AutoDoc HSE.

ICON KEY

- Critical information
! Important information
- Tip/useful information
- Key concept
- Process to carry out

- Lite
- Standard
- Server
- ✓ Enterprise

Each chapter contains important and useful information. However, the more vital content of the manual is highlighted via an icon in the left margin. The key to the left of this paragraph depicts a miniature version of the icons used, together with a description of their meanings.

Because AutoDoc HSE is offered in a number of versions to suit different requirements, the functionality offered in each version differs. Sections of the manual which document functionality only available in some versions will include information in the left margin (similar to the icons) to indicate this limitation. The example in this page's left margin shows that functionality is only offered in the enterprise version.

While the manual is laid out in a logical format with the location of key topics listed in the table of contents, an index has also been provided to reference items which are not readily located using the table of contents alone. The locations of specific examples, as well as the locations of the definitions of every on-screen control in the AutoDoc HSE application, are also included in the index.

We welcome feedback on Streamline Software products, including this manual. If you would like to make any suggestions for improving our products, please contact us: www.streamlinesoftware.net

Conventions

The following conventions apply in this manual:

- Filenames and file paths, drive letters, or text visible in on-screen controls appear in the same font as used in the following example: `C:\AutoDoc HSE`.

- Any element of a text string that is not fixed, is denoted with '<>' brackets, as in the following example: `C:\Documents and Settings\<folder name>\<filename>`.

- When referring to an on-screen control such as a button or text control, the name of the control appears in italics, as in the following example: Click the *OK* button to continue.

Installation

This chapter contains important information on how to carry out the installation of the AutoDoc HSE system. Installing AutoDoc HSE is a simple operation - perhaps more simple than you would expect. Please pay particular attention to the procedures detailed here, as the system will not function correctly if not installed accordingly.

This chapter contains the following sections:

- Before you start

- Installing AutoDoc HSE

- Initial configuration

Before you start

System requirements

The following requirements apply to the AutoDoc HSE system:

- One of Windows 2003 Server, Windows 2008 Server, Windows 2012, Windows XP Professional, Windows Vista, Windows 7, Windows 8 or Windows 8.1 operating systems.

- Both 32 and 64 bit CPUs are supported.

- If fax functionality is required, you need to be registered with ActiveFax, or have Microsoft Fax installed, configured and running on the machine on which AutoDoc HSE is installed. An external phone line is also required for sending faxes via Microsoft Fax.

- If SMTP e-mail functionality is required of AutoDoc HSE, outgoing SMTP mail server settings will be needed for post-installation configuration. If MAPI e-mail functionality is required, a MAPI compatible e-mail client (such as Microsoft Outlook) is required.

- A minimum of 300 MB of free hard drive space.

AutoDoc HSE versions

AutoDoc HSE is available in 'Lite', 'Standard', 'Server' and 'Enterprise' editions.

The main differences between the versions are the number of users that can be registered within the application, and the level of functionality. For a summary comparison of the different versions, please see Appendix A.

Single/server installation

Regardless of your AutoDoc HSE edition, it should only be installed once.

Note that even if you are installing an edition for multi-user use, the AutoDoc HSE application requires a **single** installation only. AutoDoc HSE multi-user editions should **not** be installed on individual workstations. Under multi-user editions of AutoDoc HSE, the application is installed to the server, and a shared

virtual printer is created. Client machines which require the AutoDoc HSE functionality only need to have this network printer installed via the standard Windows 'Add Printer' functionality, together with the Client Viewer as detailed in this chapter.

If you are installing AutoDoc HSE in a terminal server environment, install onto the console of the server itself, rather than installing through a terminal session.

Registering for, or installing, a fax service

If you don't wish to make use of ActiveFax, you can use Microsoft Fax as your fax service. For instructions on enabling Microsoft Fax, please consult the appropriate Microsoft knowledgebase article from the Microsoft website:

http://support.microsoft.com/ (search for "enable fax service").

Installing AutoDoc HSE

AutoDoc HSE is available for installation from two sources:

- An installation CD

- A downloadable file available from the Streamline Software website, www.streamlinesoftware.net

Running from CD

Perform the following steps to run the installation from CD:

1. Insert the CD into your CD/DVD drive.

2. The installation program should run automatically, in which case you should now move to the instructions in the "Configuring the AutoDoc HSE setup wizard" section below. If your 'auto run' setting is disabled, you will need to perform step 3 to start the installation manually.

3. Browse to your CD/DVD drive (often designated as `D:\` within Windows-based applications) and launch the file `Setup.exe`.

Running from a downloaded file

Perform the following steps to run the installation from a downloaded file:

1. Browse to the location to which the `Setup.exe` file was unzipped.

2. Double-click on the file to launch the installation.

Configuring the AutoDoc HSE setup wizard

When you run the installation program, you are prompted to select your language:
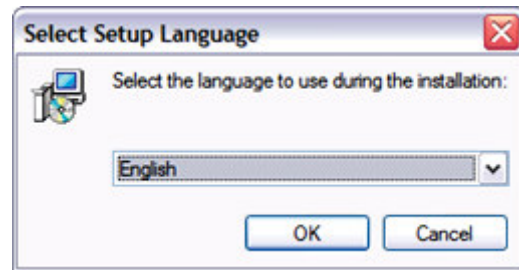
1. Select your language and click the *OK* button to continue. The setup wizard is launched:

2. Click the *Next* button to continue.

3. If you wish to proceed with the installation, read and accept the licence agreement, and click the *Next* button:
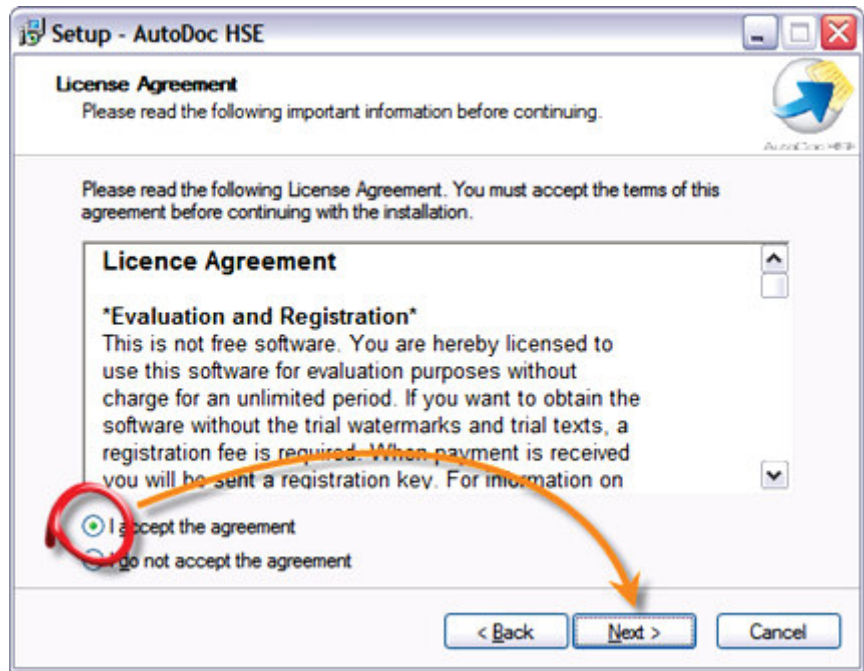
4. Select the location in which you want AutoDoc HSE to be installed (it is recommended that you accept the default location), then click the *Next* button:
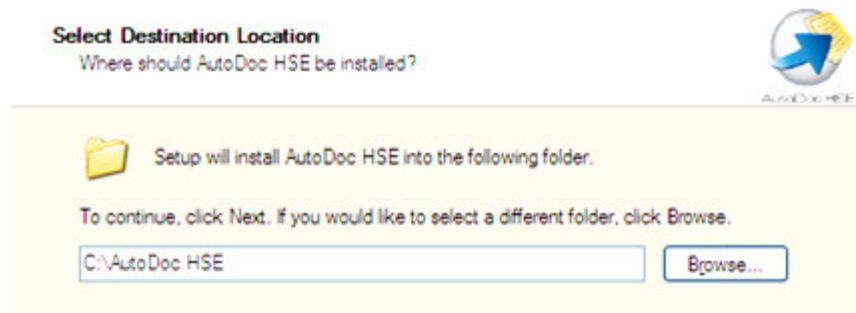
5. Select the Start Menu folder in which you want the AutoDoc HSE program's icons to be installed (it is recommended that you accept the default location), then click the *Next* button:
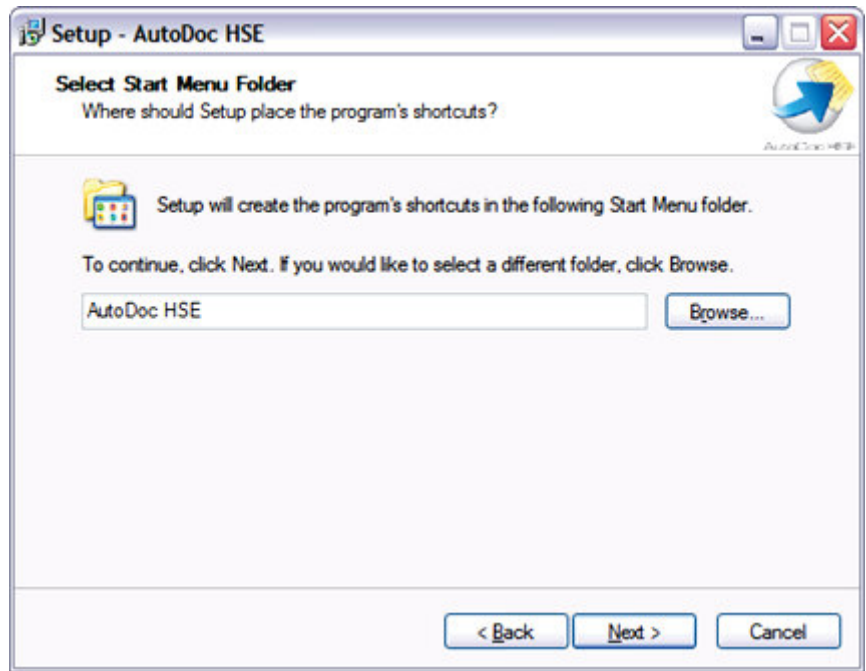
6. Use the checkboxes to specify whether the Wizard should create a desktop icon and/or a Quick Launch icon, then click the *Next* button:
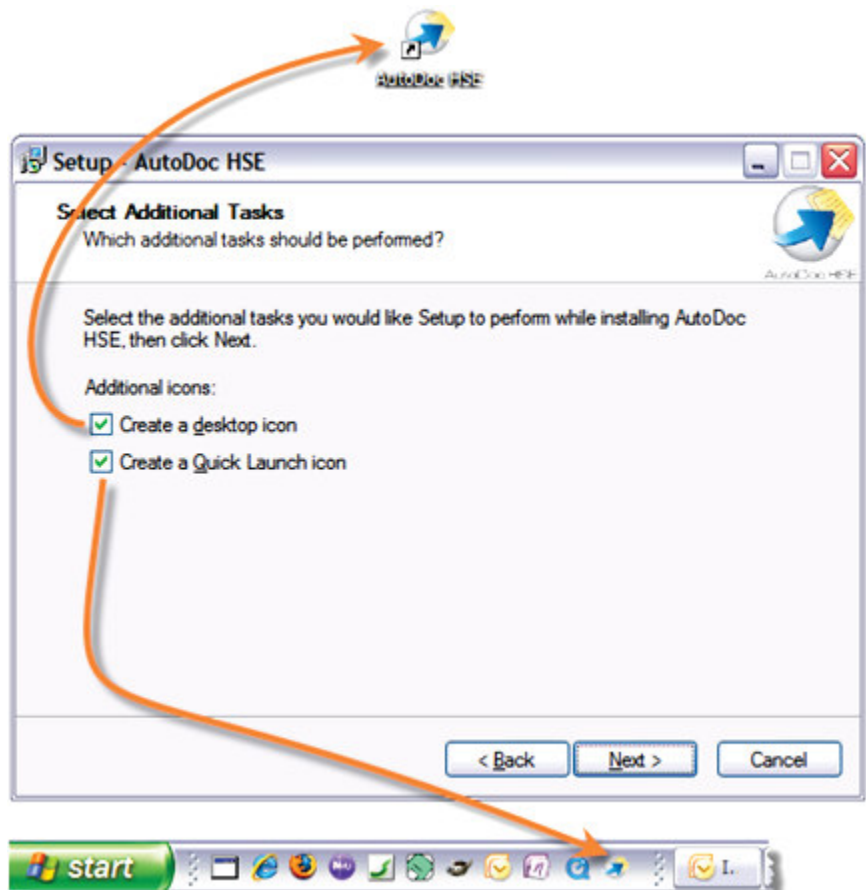
7. Confirm all installation options, and either click the *Install* button to begin the installation, or click *Back* to go to previous screens to change options:
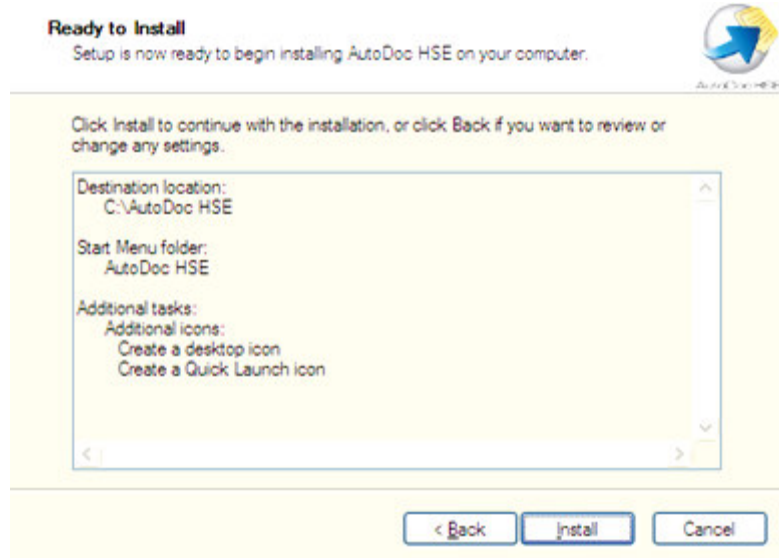
8. You will be presented with progress information as the installation runs. When the installation has finished, the following screen is displayed:
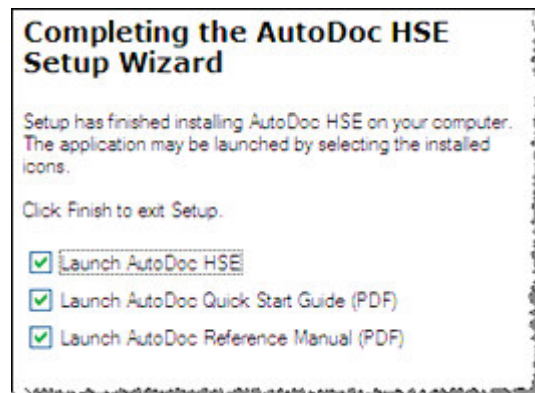
9. Clear the checkboxes for launching the documentation items, and leave the *Launch AutoDoc HSE* checkbox checked:
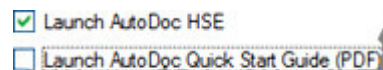
10. To complete the installation, the newly-installed application must be opened. Click *Finish* to launch it now. Installation continues in the background. When the application opens, AutoDoc HSE will create a virtual, shared printer called 'AutoDoc HSE'. You may need to approve the installation of the printer driver:
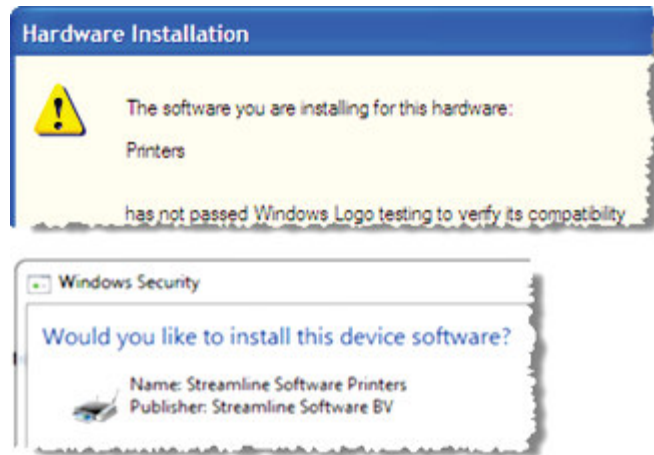
11. Once installed, you will receive a prompt stating that this process has completed:
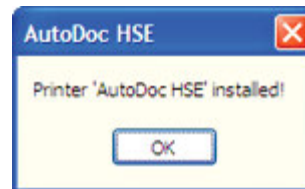
Initial configuration

When making changes within the AutoDoc HSE console, note that the *Apply* button must be used to ensure changes take effect:

Specifying an administrator e-mail address

We strongly recommend that you specify an administrator e-mail address. Many of AutoDoc HSE's warning or error messages can be e-mailed to this e-mail address to alert an administrator of any issues.

To specify this e-mail address, navigate to AutoDoc HSE's General tab in the Global setup area:
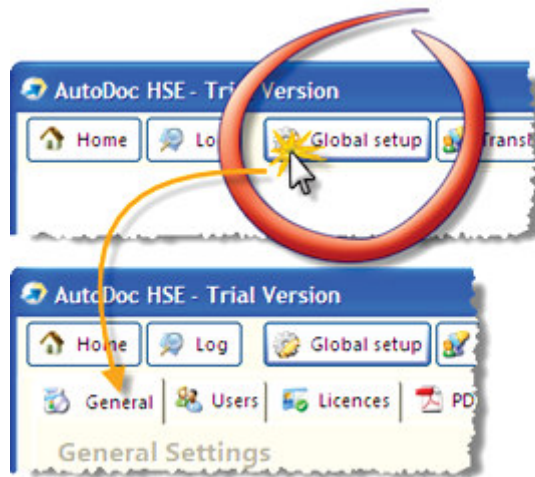
...and add a valid e-mail address to the control:
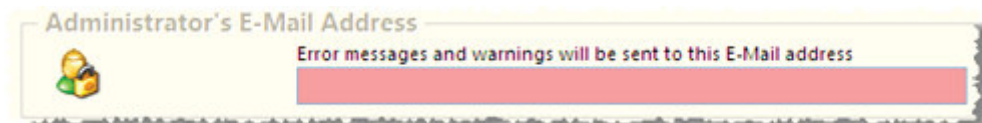
Running an additional service

By default, when a print job is received by the AutoDoc HSE printer, the AutoDoc HSE application itself processes the job and creates a print stream.

Also, by default, AutoDoc HSE is only able to interact with local resources. For example, by default, AutoDoc HSE can only print to local printers, archive to local folders, and include extra e-mail attachments from local folders.

AutoDoc HSE provides an optional feature to extend this default functionality. This feature is known as the 'user service', which can be installed after installing the main AutoDoc HSE application. The user service extends the default functionality in the following ways:

▪ With the additional service installed, AutoDoc HSE delegates the creation of the print stream to this service. This can improve print processing speed for large print loads.

▪ Because the service is installed under a specific user profile, you can opt to install it for a profile which has access to a wide variety of your network resources. This in turn makes those network resources available to AutoDoc HSE, which greatly increases your options when configuring the system.

▪ AutoDoc HSE's "scanner" functionality is also enabled with the user service running (see the PDF Scanner section beginning on page 187 for more details).

If you are running AutoDoc HSE with multi-user use in mind, we strongly recommend that you do install the separate user service, following the steps below.

Note that if you intend to create a separate user service, you should create the service for a user who has access to **all** the network resources which AutoDoc HSE will be required to access, for **all** AutoDoc HSE users.

1. Navigate to the General tab of the global setup area. The General tab is the first tab in the global setup view:
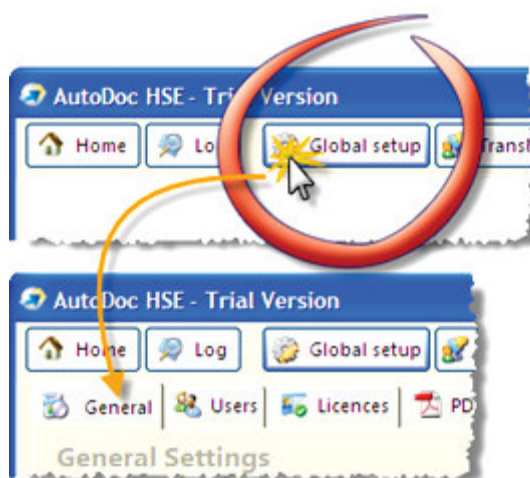
2. The *Run as another User Service* control group is located within the General tab. Complete the *User Name*, *Password*, and *Domain* fields (see page 56 for more details on these fields, if needed), and use the *Test Login* button to ensure AutoDoc HSE can successfully use this login:
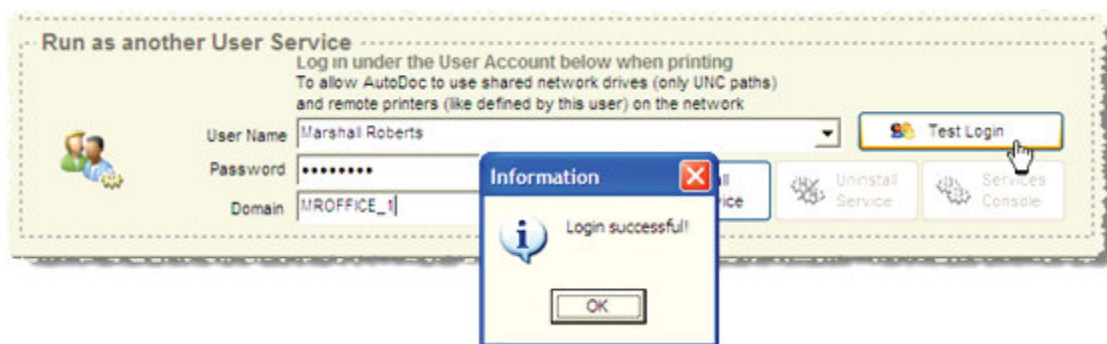
3. Install the service under the specified login using the *Install Service* button:
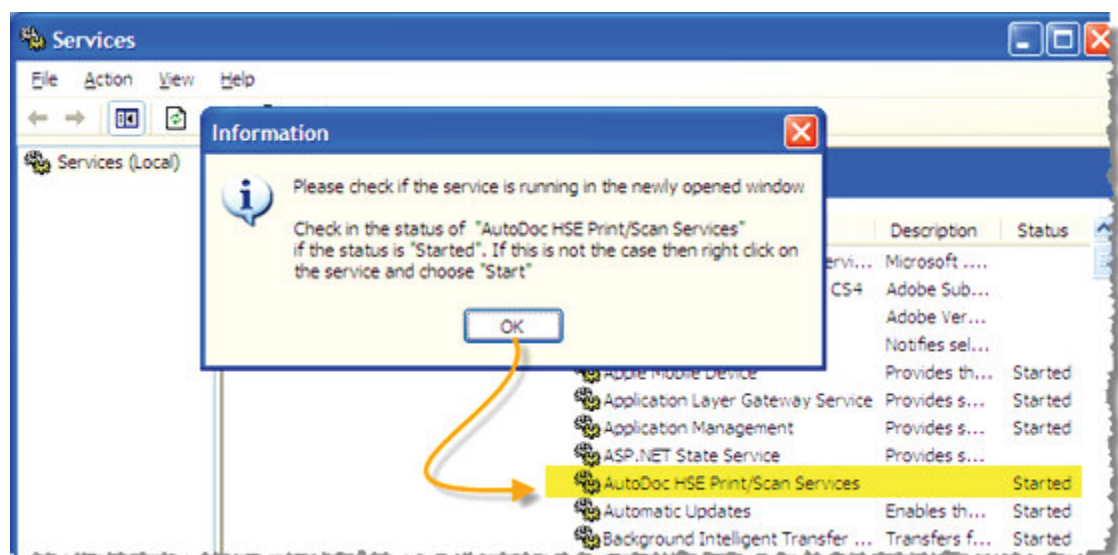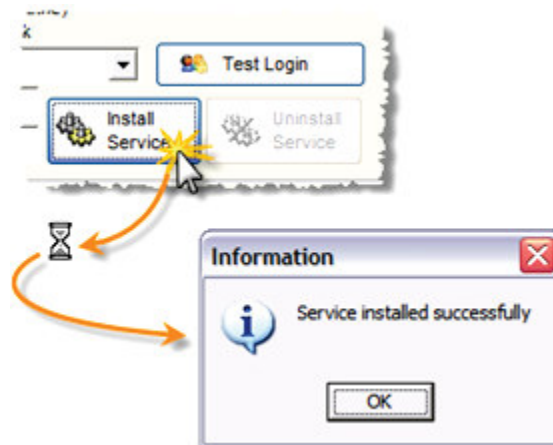
4. If the service does not start automatically and you are unable to start the service manually (as is known to happen with installation on Windows 2008R2 servers), you may need to edit the properties of the service to re-enter the username and password in the Log On tab, and apply the changes before starting the service again:
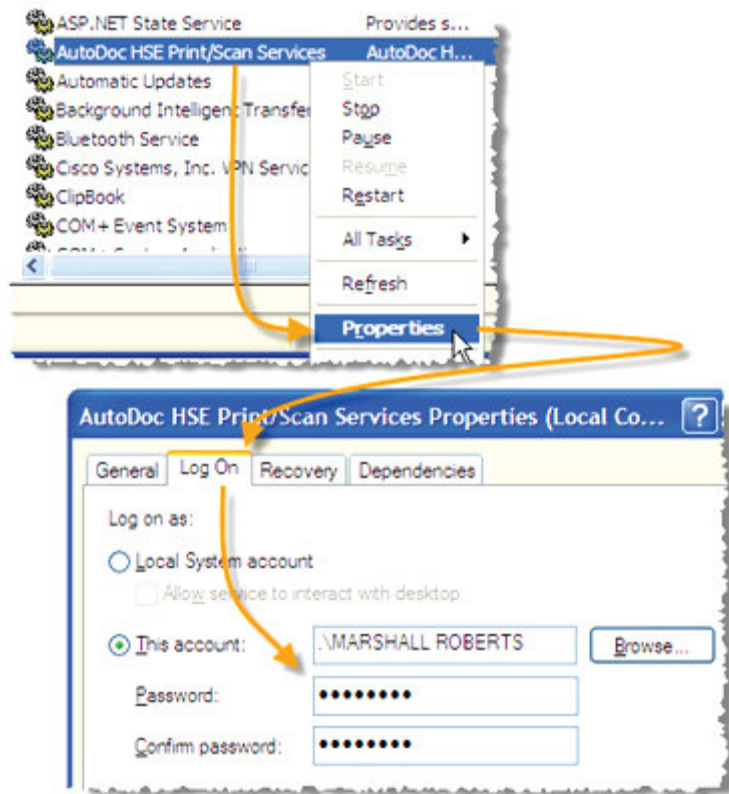
5. From within the same properties dialogue (i.e. as for step 4), navigate to the *Recovery* tab and change the service failure settings to match those specified below:
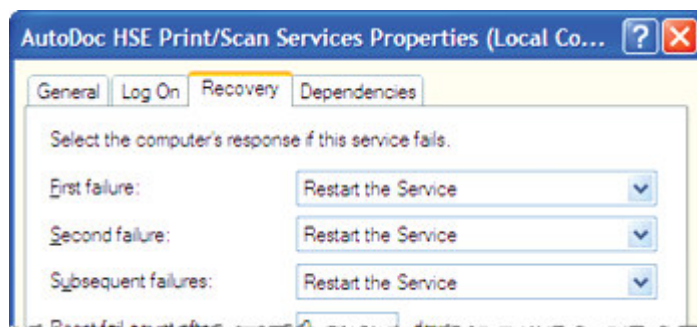
Switching off Windows indexing

We recommend that the Windows indexing service should be disabled for the AutoDoc HSE program folder, to reduce the risk of indexing locking any temporary AutoDoc HSE files involved in print processing. To ensure that indexing is not enabled for the AutoDoc HSE program folder:

1. Locate the installation folder (which by default is `C:\AutoDoc HSE`) and right click to access the folder's advanced properties:
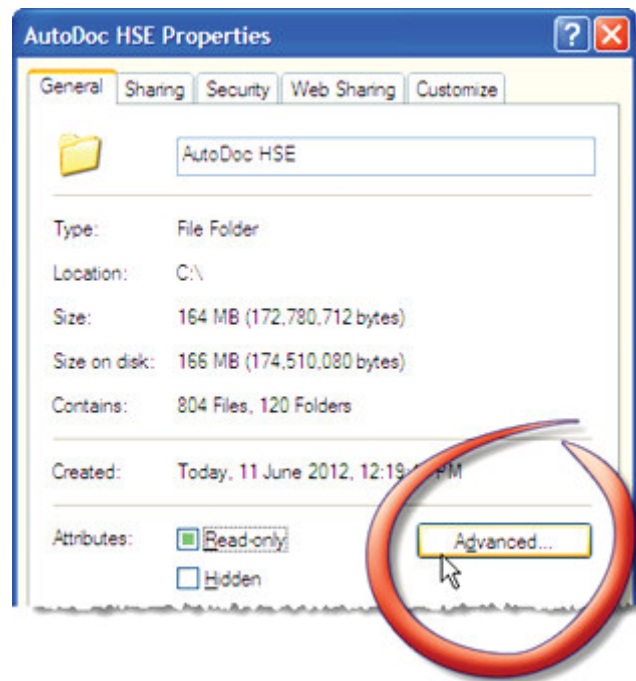
2. Ensure the indexing checkbox is cleared:
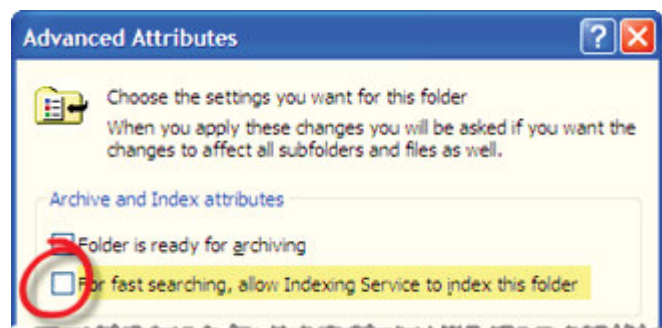
3. On closing the Properties dialogue, you will be prompted to confirm whether your changes should apply to just the AutoDoc HSE folder, or all files and sub-folders. Apply the changes to all folders and sub-folders:
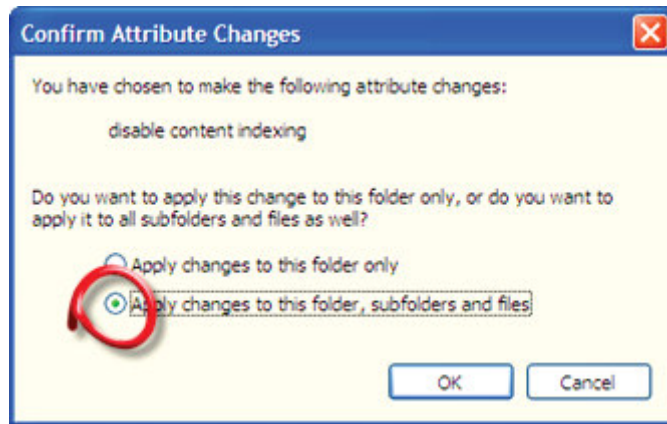
E-mail setup

AutoDoc HSE's e-mail delivery method is a convenient way of testing the system's output to familiarise yourself with the system. AutoDoc HSE has its own e-mail client which you can configure with some basic information to enable the system to send emails. More details on the E-mail area depicted below are available on page 68.
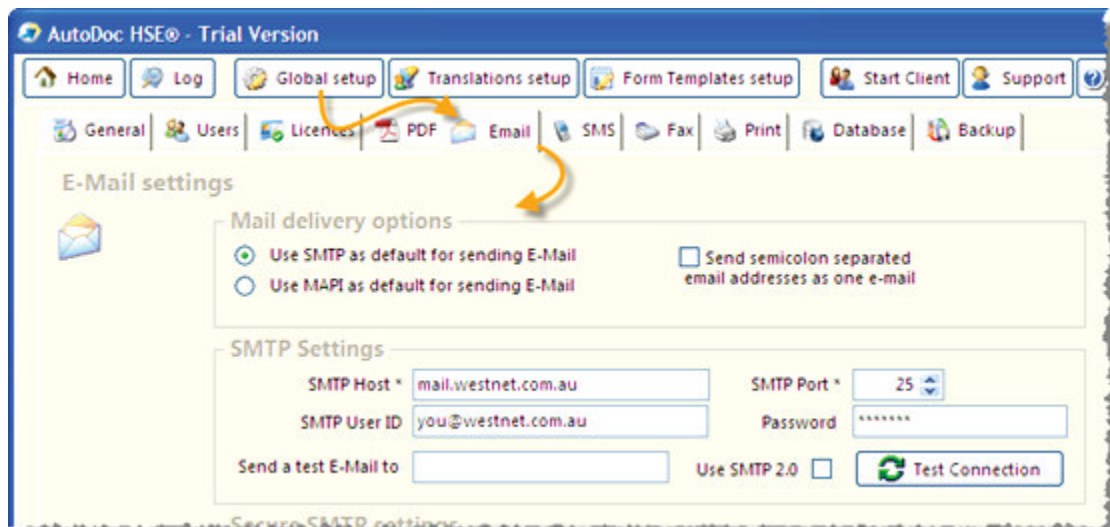
Printer setup

The AutoDoc HSE printer can be set as the default printer for a user if this suits a particular need. Doing so makes document delivery literally the push of a button away in many applications – via the *Print* button.
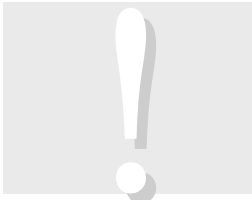
! However, this also introduces the risk that documents may be unintentionally sent to this multi-output package. We strongly recommend that you familiarise yourself with the application before making the decision to set AutoDoc HSE as the default printer (please also see the "Default form" section on page 47).

Additional AutoDoc HSE printers

✖ Lite
✖ Standard
✖ Server
✓ Enterprise

AutoDoc HSE allows you to create additional virtual printers, to accommodate heavy print loads. By default, the enterprise version processes print jobs in a multithread (10 threads) manner, but the ability to create additional printers extends that capacity.

If you require the increased processing capacity offered in the enterprise version, navigate to the global setup area, then to the Print tab (see Figure 2). The *Create extra AutoDoc HSE Printer(s)* area facilitates this functionality.
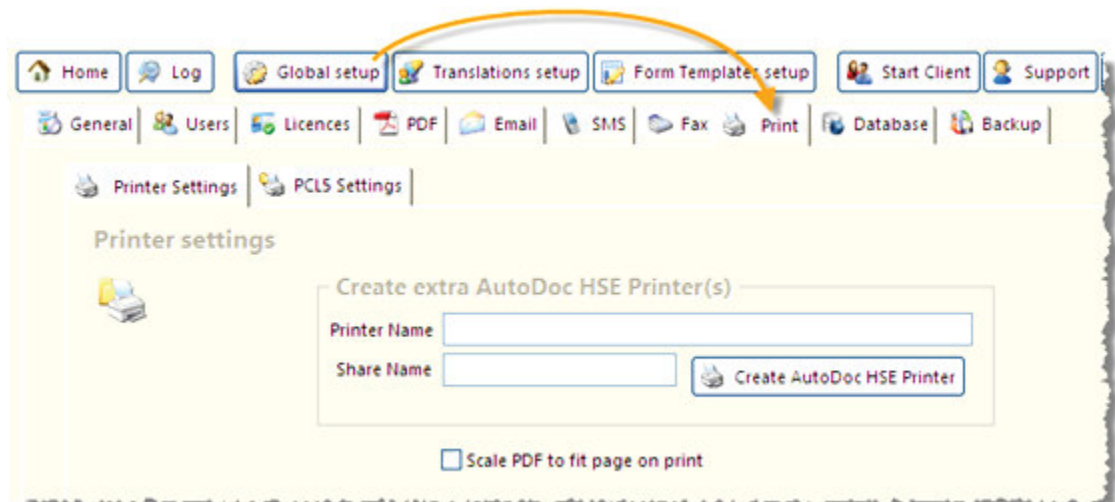
FIGURE 2 - navigating to the Print tab, located in the global setup area. Additional AutoDoc HSE printers can be created here to accommodate heavy print loads (enterprise version only).

With the installation of AutoDoc HSE now complete, you can proceed to detailed configuration of your AutoDoc HSE system. We do, however, recommend that you familiarise yourself with AutoDoc HSE's key concepts, as described in the next chapter.

Quick start configuration

The AutoDoc HSE Quick Start Guide provides a quick reference to get new users up and running, and also quickly demonstrates how the system works. You may like to refer to that guide before continuing with more detailed configuration. Also, you will find some installation tips in the support section of the Streamline

Software website, which contains knowledgebase articles that may also help to troubleshoot any problems you are experiencing:

http://www.streamlinesoftware.net/HC/hcbase/index.aspx

If you are running a server/client setup of AutoDoc HSE, you will need to perform the client setup as well.

Client setup

For each user who will use AutoDoc HSE to process print jobs, perform the following steps:

1. From the client computer, ensure that the server on which AutoDoc HSE is installed, is configured as a trusted location. For example, in Internet Explorer, the process to configure the server as trusted would be as depicted below:
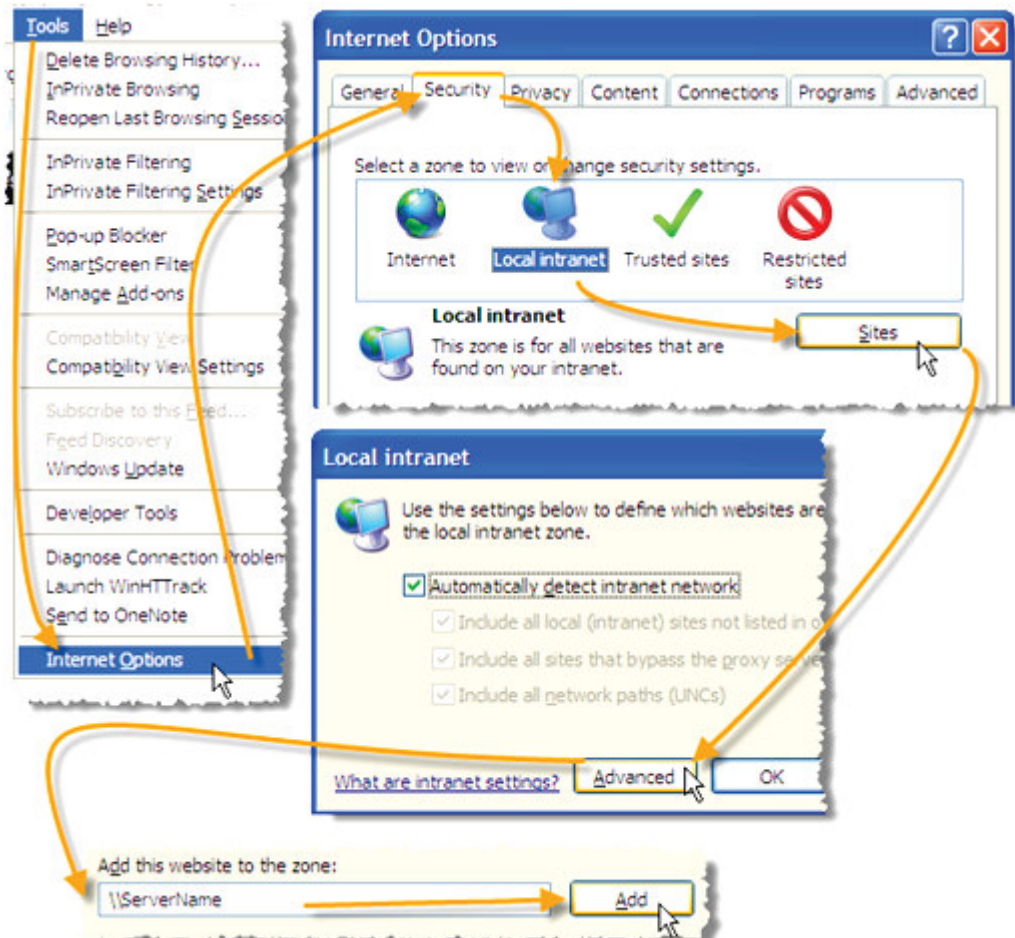
2. From the client computer, navigate to the 'userdata' folder in the AutoDoc HSE program folder on the server. The default location on the server is:

```
C:\AutoDoc HSE\userdata
```

3. Run the file SetupClient.exe from the userdata folder. This installs the client software and the AutoDoc HSE virtual printer, which the user can then use to direct print jobs to AutoDoc HSE.

4. Configuration options for the client viewer are more fully detailed in the section starting on page 180.

5. Print a test page to the client's AutoDoc HSE virtual printer.

AutoDoc HSE concepts – how it works

The AutoDoc HSE system is based on a number of entities which combine to produce a flexible and easy to use system. This chapter introduces these components as a necessary precursor to configuring your AutoDoc HSE application.

The AutoDoc HSE application's user interface is purely a configuration and management console, used to define how print jobs should be handled. As such, it does not have the visual prompts of a workflow-based functional interface (for example, an invoice entry screen) which, by the very familiarity of the workflow, offers clues as to its purpose. We therefore recommend that you familiarise yourself with AutoDoc HSE's key concepts before configuring your system:

- Delivery methods

- Font colour

- Textual commands

- Translations

- Variables

- Regions

- PCL commands and variables

- Forms

The following sections introduce each of these concepts, and the final section, "Putting it all together", exemplifies the working relationship between them.

Overview

For the reader familiar with the term 'metadata' (data about data), this is exactly the central concept behind AutoDoc HSE's operation. Using functionality that is already built in to many applications – font colour – AutoDoc HSE allows the user to encode data with another set of data, which gives text an extra level of 'meaning', which is recognisable to AutoDoc HSE. For example, an existing report that your organisation has always used – a profit and loss report – can be now be encoded so that the AutoDoc HSE printer 'knows' that it is a profit and loss report, not just a print job. And because AutoDoc HSE 'knows' that it is a profit and loss report, it can process the report according to the rules you specify for profit and loss reports.

Delivery methods

The term 'delivery methods' refers to the delivered output of an AutoDoc HSE print job. The following five delivery methods are supported by AutoDoc HSE:

- Print – the job printed to AutoDoc HSE is printed to hard copy.

- Archive (file storage) – the job printed to AutoDoc HSE is converted to PDF format and saved in a user-defined location.

- Fax – the job printed to AutoDoc HSE is converted to TIF format and queued to the specified fax service.

- E-mail – the job printed to AutoDoc HSE is converted to PDF (or another format) and included as an attachment on an e-mail to the specified address.

- SMS – an SMS message can be delivered to an SMS gateway service.

A print job can be delivered by one, or a combination of any/all of the above delivery methods, with further detailed options available to each.

Font colour

AutoDoc HSE makes use of font colour to allow document content to be 'encoded' in a way which AutoDoc HSE can recognise, but which is either invisible to the user, or appears to the user as regular text within the document.

The functionality that allows text colour to be user-defined is built in to Windows as standard functionality, and the colour of text in documents is therefore user-definable in a wide range of applications.
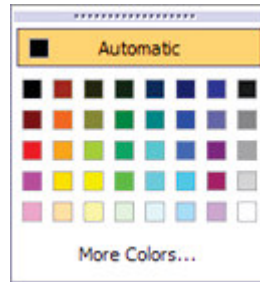
FIGURE 3 - the Windows palette

The Windows 'palette' (Figure 3) is a familiar feature to any user who utilises different font colours. This standard palette is actually accessing some preset combinations of 'RGB' (Red/Green/Blue) 'mixture' settings for the colour in question. For example, the white colour in the palette is actually defined as a mixture of 255 (the maximum) for each of Red, Green, and Blue. These settings can be viewed in the Custom palette dialogue (see Figure 4), which is usually accessible via the *More Colors…* option in a Windows-based application palette.
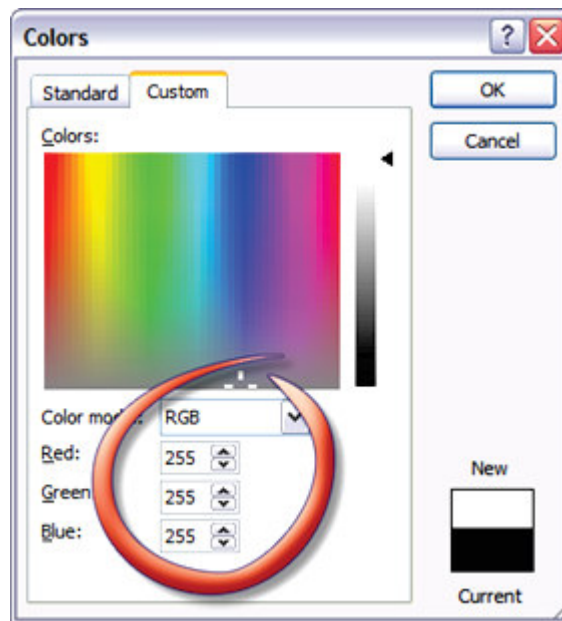
FIGURE 4 - a Microsoft application's custom palette, showing the 'RGB' numeric settings. In this case, all colour values are at their maximum (255), which, mimicking the natural light spectrum, produces white.

By default, AutoDoc HSE treats text with any of the following RGB settings as information carrying special meaning to AutoDoc HSE, rather than information that must only be printed:

- 255, 255, 255 (that is, white). Such text is treated as an AutoDoc HSE textual command (textual commands are explained in more detail later in this chapter).

▪ 1, 1, 1 then 2, 2, 2… through to 199, 199, 199. The lower end of these combinations are so close to black that they appear as black in a printed document. Such text is processed as an AutoDoc HSE user-defined variable (user-defined variables are explained in more detail later in this chapter).

These default RGB settings for textual commands and user-defined variables can be overridden within the AutoDoc HSE application, to suit your preferences.

Note that AutoDoc HSE also provides an alternative means of making text meaningful to the application. If your environment will not support the use of font colour, you can designate certain positions on the page, where any text will be interpreted by AutoDoc HSE as having specific meaning. This concept is explained more fully in the section on "Regions" below.

Textual commands
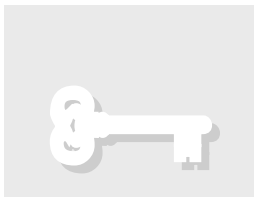
When a document is printed to the AutoDoc HSE printer, by default AutoDoc HSE searches each of the document's pages for text with a white font colour (RGB = 255, 255, 255). These white textual commands embedded in the document itself determine how each of the document's pages will be processed by AutoDoc HSE and, therefore, each *page* can potentially be delivered via different means.

We refer to textual commands as commands simply because they instruct AutoDoc HSE on what to do with a print job.

The definition of textual commands as being white text can be changed within the AutoDoc HSE application – any colour can be assigned to designate a textual command. The advantage of the default white font colour is that textual commands can be included in most documents while remaining invisible to the human eye.

A number of different command types can be added to a document. Of the most commonly used commands, the first four directly determine the delivery method that will be employed:

▪ Form number, which specifies the AutoDoc HSE form to be applied to the document (forms are explained in more detail later in this chapter).

▪ Recipient e-mail address, which instructs AutoDoc HSE to send the page in question to the e-mail address specified.

▪ Recipient fax number, which instructs AutoDoc HSE to send the page in question to the fax number specified.

▪ SMS messaging command, which instructs AutoDoc HSE to send a preconfigured SMS message to the specified phone number.

The next four command types affect content of delivery:

- A page break command, which is used to separate deliveries that would otherwise be merged into one file (more on this can be found in the section called "Breaking up merged document output" on page 159).

- File path and name, which instructs AutoDoc HSE to include the specified file as an attachment to e-mailed deliveries (see the definition for the *Extra attachments* control on page 123 for more information on extra e-mail attachments).

- File name only, which instructs AutoDoc HSE to include the specified file as a transparent 'overlay' for the purpose of adding extra document content (for example, images) to the output. Note that the file name must refer to a file of that name located in the hseoverlays subfolder of the AutoDoc HSE program directory. See page 132 for more information on overlays).

- Language, which instructs AutoDoc HSE to send faxes and e-mails in a specific language. This function allows 'sub-forms' to be created within forms. For example, form 1 may have two 'sub-forms' – form 1 with an English sub-form, and form 1 with a French sub-form.

Note that textual commands can be added to a document automatically by an application, based on information available to that application. For example, accounting applications can create an invoice including the debtor's e-mail address in white text, thus eliminating the need for the end user to be aware of the mechanisms by which AutoDoc HSE functions – the user only needs to 'print' the invoice, and it will be sent to the debtor's e-mail address.

More detailed information about how AutoDoc HSE finds and processes textual commands can be found in the chapter devoted to "Document content configuration", which starts at page 153. The information above, together with the remainder of this chapter, is enough to provide familiarity with the core concepts.

Variables
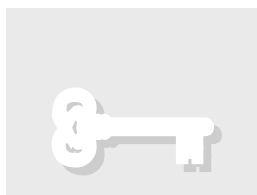
AutoDoc HSE variables are blocks of information in print jobs, which may change from document to document, and which can be used as data to be included in the delivery of documents. AutoDoc HSE supports pre-defined variables for 'system' type information, as well as up to 199 user-defined variables.

Note that AutoDoc HSE variables are designated by enclosing the variable name within percentage (%) symbols, in the following format: %<variablename>%. AutoDoc HSE variables are not case-sensitive (for example, both %company%, and %Company% are recognised by AutoDoc HSE).

Pre-defined system variables

System variables include such information as username, print date, and sender's e-mail address. These variables are used primarily to include relevant information in the delivered documents. For example, AutoDoc HSE could construct an e-mail that includes the sender's work phone number (%officephone%) and other pertinent information.

The system variables relating to user-based information, such as e-mail address and phone number, are sourced from user profiles which are defined within the AutoDoc HSE application.

The following system variables are available within AutoDoc HSE:

- %jobname% - the name of the Windows print job as sent to the AutoDoc HSE printer.

- %formname% - the name of the AutoDoc HSE form under which the job is processed.

- %formnumber% - the number of the AutoDoc HSE form under which the job is processed.

- %printername% - the name of the AutoDoc HSE virtual printer under which the job is processed.

- %tray% - the tray of the AutoDoc HSE virtual printer which will be used for printing. This variable is set by the user as part of optionally specifying a tray setting when printing to the AutoDoc HSE printer. See page 107 for more information on the %tray% variable.

- %location% - the location of the AutoDoc HSE virtual printer as specified in the printer's properties, under which the job is processed.

- %computername% - the computer name associated with the print job.

- %documentname% - the name of the document sent to the AutoDoc HSE printer (in some cases this may be the same as the %jobname%).

- %docname% - the short name of the document sent to the AutoDoc HSE printer (in some cases this may be the same as the %jobname%).

- %documentnumber% - what remains from %documentname% when all non-numeric characters have been stripped out. For example, if %documentname% = `Invoice 230 for Account 56 – EZ Electrics` then the %documentnumber% = `23056`

- %language% - the two-letter language code under which the job is processed.

- %email% - the e-mail address for which the current process applies. This variable can change within the same print job (if, for example, there are two textual e-mail commands on the same page).

- %emaildomain% - the e-mail address domain (e.g. `streamlinesoftware.net`) for which the current process applies. This variable can change within the same print job (if, for example, there are two textual e-mail commands on the same page).

- %smsnumber% - the SMS number to which SMS jobs will be delivered. Note that this variable is only recognised as a variable in the SMS tab of the Global setup area.

- %smstext% - the message of a generated SMS. Note that this variable is only recognised as a variable in the SMS tab of the Global setup area.

- %programroot% - the file path of the location of the autodochse.exe executable file. This is C:\AutoDoc HSE by default.

- %documentroot% - the file path of the directory specified in the *Default Document Root* control of the PDF tab of the Global setup area.

- %longdate% - long date description of system date – for example, '25 September 2007'. The format of the long date description is Windows language-dependent.

- %shortdate% - short date description of system date – for example, '25/09/2007'.

- %date% - date stamp of system date in dd mmmm yyyy format – for example, '28 April 2005'.

- %usdate% - date stamp of system date in mmmm dd yyyy format – for example, 'April 28 2005'.

- %q% - calendar quarter of system date – for example, '3' for September.

- %ww% - week digit of the year, in two digits– for example, '02' for 10th January.

- %w% - week digit of the year, trimmed of any leading zeroes – for example, '2' for 10th January.

- %yyyy% - four-digit year stamp of system date – for example, '2005'.

- %yy% - two-digit year stamp of system date – for example, '05'.

- %q% - the of system date – for example, '05'.

- %mmmm% - full name of month of system date – for example, 'April'.

- %mmm% - month of system date as three letters – for example, 'Sep' for September.

- %mm% - two-digit month stamp of system date – for example, '04' for April.

- %dddd% - full name of day of week of system date, for example, 'Monday'.

- %ddd% - day of week of system date as three letters – for example, 'Mon' for Monday.

- %dd% - two-digit day stamp of system date – for example, '28' for the 28th day of the month.

- %hh% - two-digit hour stamp of system date, in 24-hour format – for example, '18' for 6 p.m.

- %nn% - two-digit minute stamp of system date – for example, '30'.

- %ss% - two-digit second stamp of system date – for example, '59'.

- %zzz% - three-digit millisecond stamp of system date – for example, '093'.

- %z% - milliseconds stamp of system date, without leading zeros – for example, '93'.

- %username% - the username of the user who created the print job.

- %userdir% - the path of the document location of the user who created the print job. This corresponds to the *User directory location* control in the Users tab of the Global setup area.

- %fullname% - the full name of the user, as recorded in AutoDoc HSE, who created the print job.

- %company% - the company of the user who created the print job.

- %department% - the department of the user who created the print job.

- %officelocation% - the office location of the user who created the print job.

- %title% - the title of the user who created the print job.

- %emailaddress% - the e-mail address of the user who created the print job.

- %faxnumber% - the fax number of the user who created the print job.

- %officephone% - the office phone number of the user who created the print job.

- %homephone% - the home phone number of the user who created the print job.

- %remarks% - the remarks associated with the user who created the print job.

- %address% - the address of the user who created the print job.

- %pdf% - this variable can be used with PDF archiving, to represent the resultant archive file. See the *Parameters* control definition on page 147 for more information on this variable.

- %tif% - this variable can be used with TIF archiving, to represent the resultant archive file. See the *Parameters* control definition on page 147 for more information on this variable.

- %xml% - this variable can only be used with XML archiving, to represent the resultant archive file. See the *Parameters* control definition on page 152 for more information on this variable.

User-defined variables

A user-defined (or textual) variable can contain any text 'string' from a printed document that the user wishes to assign to that variable. Again, this text can be used in the content of faxes, e-mails, and archive file locations.

✗ Lite
✗ Standard
✓ Server
✓ Enterprise

Additionally, depending on your version, AutoDoc HSE can retrieve information from a third party database, which can then be used to populate variables (see the section entitled Database integration on page 206 for more information on this advanced feature).

Variables are usually based on strings of textual content in the source document being printed, and are defined as being of a certain RGB value (like commands). However, in contrast to commands, user-defined variables do not instruct AutoDoc HSE to do anything; the information is simply stored for later use (for example, to construct an e-mail subject heading).

For example, if a user defined variable is defined as being text of RGB colour 1,1,1, AutoDoc HSE looks for any text of that colour in a page. The text string it finds in that colour is then stored as the contents of that variable, and that text string can then be used to create an e-mail or fax subject, and so on.

By default, user-defined variables are known simply as 'Variable 1', 'Variable 2', and so on. This means that by default, the syntax by which they are recognised is

`%variable 1%`, `%variable 2%`, and so on. The default variable names also represent the default RGB settings for each. For example, variable 1 has an RGB setting of 1,1,1, variable 2 is 2,2,2, and so on. The 199 variables (depending on your version) therefore appear by default in 199 shades. The lower variables (e.g. variable 20) are not strictly black, but appear as black to the human eye (as an example, this sentence has an RGB value of 20,20,20).

A practical example of a user-defined variable is a report heading. If the report was a financial 'Profit & Loss' report produced by an accounting application, the application could write out that report's heading ('Profit & Loss') in a 'not quite black' text (for example, RGB = 1, 1, 1). On receiving the print job, AutoDoc HSE would then register %variable 1% as being 'Profit & Loss'. This variable could then be automatically incorporated in the document's delivery options (for example, an e-mail could state that the subject of the e-mail is 'Profit & Loss'). The dynamic incorporation of a variable in the e-mail's subject heading is achieved via AutoDoc HSE's forms (forms are explained later in this section).

Remember that both the RGB settings that designate the variable text, as well as the name of the variables, are user-definable. For example, by default %variable 1% is populated by text with RGB values 1,1,1, but this variable could be renamed %doctype% (or even %document type%) and could be defined as having an RGB value of 200, 12, 154, if this suits your particular needs.

AutoDoc HSE also provides a 'global names' feature for variables, and also allows you to use only part of a variable's text if only part is required. These features are described in detail on page 97, in the "Variables" configuration section.

Within the AutoDoc HSE application, you can access the complete list of variables, both system and user-defined, by pressing the keyboard F1 key.
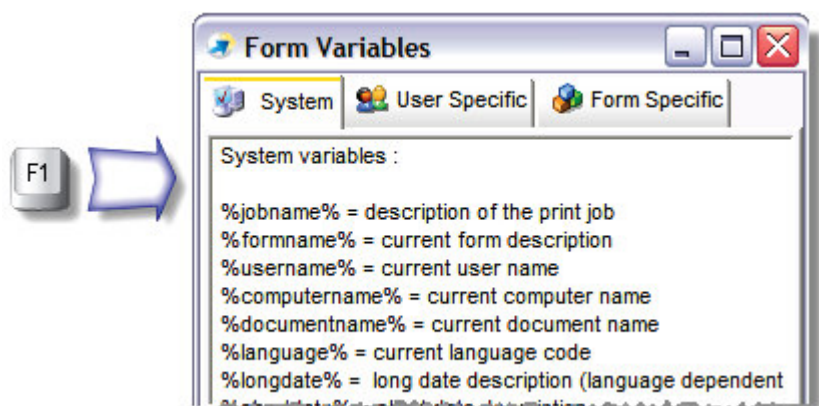
The use of 'wildcards' is also catered for with variables. Please see page 98 for more details on using wildcards with variables.

While variables do not have a 'type' as such (i.e. they will hold a text string in any format), AutoDoc HSE does cater for making variables more 'strongly-typed' should this be required. See the section starting on page 198 for more details.

Regions

The principal method used by AutoDoc HSE to identify variables and translations is, as discussed above, font colour. However, AutoDoc HSE also provides an alternative to font colour. The application can also interpret physical co-ordinates provided, to analyse a print job and treat any text that falls in those regions specified, as a variable or translation (translations are explained later in this chapter).

For example, if your invoice documents are produced by a standard report, so that the invoice total is always printed in the same place, you can use X and Y pixel co-ordinates to instruct AutoDoc to find the text to use for a variable named %invoice total% within the region defined by those co-ordinates.
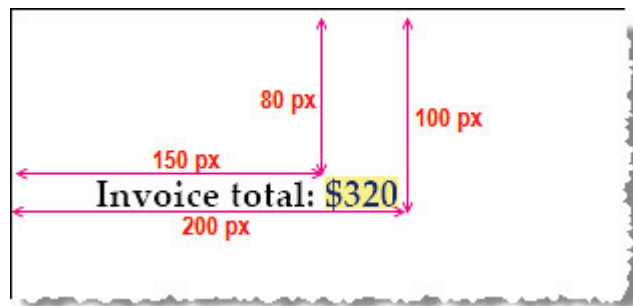
FIGURE 5 - defining a region for the text $320. This text could be captured as a variable or translation by defining the region 150,80,200,100, which defines the left top corner and right bottom corner of a rectangular region, measured from the top left corner of the page.

In this manual, font colour (or 'RGB values') will be referred to when discussing text encoded to designate variables and translations, but be aware that regions can also perform this function if font colour is not available to you.

Translations
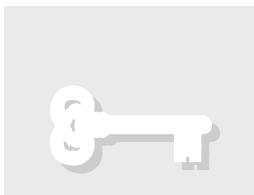
The "Textual commands" section on page 31 explains how adding certain text to a document instructs AutoDoc HSE how to deliver the page in question.

However, AutoDoc HSE also provides the flexibility to treat *existing* text as an AutoDoc HSE command, rather than requiring that you *add* commands to your documents.

This flexibility is achieved though 'translations'. AutoDoc HSE's translation functionality should not be confused with another useful AutoDoc HSE feature – language sub-forms. Language sub-forms allow you to send e-mails and faxes in

different languages, while translations allow you to 'map', or translate, existing text to an AutoDoc HSE command.

For example, your organisation may circulate an internal newsletter called 'XYZ Newsletter'. Assuming the text 'XYZ Newsletter' appears in the header of each page of the newsletter, you could configure AutoDoc HSE to recognise that this particular text string should be translated as representing the e-mail addresses of the usual recipients of the newsletter. By doing so, you could create the newsletter as usual, and simply print it to the AutoDoc HSE printer to deliver it to your pre-configured recipients.

Translations allow for pre-existing text to represent each of the textual command types (for example, e-mail addresses and fax numbers). The same 'string' of text can be configured to represent one, some, or all of the command types, as well as more than one of the same command type (as in our example, where one heading 'XYZ Newsletter' would be translated into multiple e-mail address textual commands).

Similarly, by translating colours, translations allow for "plain" text to be intercepted as variables. For example, the plain, un-encoded text "ABC Automotive" could be intercepted as RGB 0,0,0 (or by region), and translated to RGB 1,1,1.

> Note that translations don't *change* anything in the source document, they simply instruct AutoDoc HSE to *treat* the text as though it exists in the form indicated by the translation.

Translations are case-sensitive. If you instruct AutoDoc HSE to look for 'xyz newsletter', it will not recognise 'XYZ Newsletter'.

You can also make AutoDoc HSE even more sensitive with regard to what it does and does not translate, by using RGB settings. For example, you can instruct AutoDoc HSE to look only for the text 'XYZ Newsletter' which has RGB values of 0,0,255 – that is, XYZ Newsletter – and translate this to an AutoDoc HSE command.

The use of 'wildcards' is also catered for with translations. Please see page 88 for more details on using wildcards with translations.

Forms
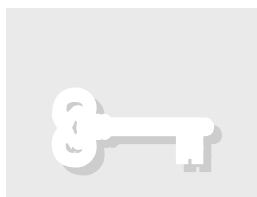
AutoDoc HSE forms store user-defined instructions which specify how AutoDoc HSE should deliver documents, including such settings as whether a letterhead should be added, the delivery method(s) to be used, and settings specific to those delivery methods (for example, at what time a fax should be sent, and/or the content of the e-mail to which the document is attached).

AutoDoc HSE stores up to 99 different form configurations, depending on your AutoDoc HSE version.

The link between a document and its form is specified within the document itself as an AutoDoc HSE textual command. That is, AutoDoc HSE 'knows' which form to apply to a document print job, because the form to be applied has been specified within the document itself.

In one sense, forms can be considered as being equivalent to 'templates', in that they define a preset configuration to be applied to documents, but the following key differences apply:

- Forms only apply to a document that has been 'printed' to the AutoDoc HSE printer. That is, forms have no bearing on the content or format of the source document, but rather define how that source document will be presented via any of the AutoDoc HSE delivery methods.

- Because forms define how a source document is delivered rather than created, it is possible that a form will apply to multiple documents of disparate types. For example, Invoices and Letters of Employment could be routed via the same AutoDoc HSE form, if a very generic form configuration was used.

Pre-defined and user-defined variables can be used extensively in configuring form options: the system variables for date and username could be used to construct, dynamically, a file path to which archive copies of documents are saved, or a user-defined variable could be used to construct a subject heading for an e-mail or fax.

For example, you may decide to use form 2 specifically for outgoing invoices for your company 'XYZ Electrical Co.'. If the invoice document has the chargeable total ($3225) printed in text with RGB = 6,6,6, and the number '2' printed in white text (which instructs AutoDoc HSE to use form 2), you could configure form 2's e-mail subject heading as follows:

```
Invoice from %company% for %variable 6%.
```

…which would result in the following e-mail subject heading:

```
Invoice from XYZ Electrical Co. for $3225.
```

In this example the %company% preset system variable, as well as the user-defined variable %variable 6% have been used. In such a case, the 'company' information would typically not change between e-mails (though it potentially could, since the %company% variable is in fact defined on a per-user basis), while the dollar amount would change with each invoice sent.

%variable 6% could of course be renamed within AutoDoc HSE to something more meaningful to you, like %invoice total%, in which case form 2's e-mail subject heading could be configured as follows:

```
Invoice from %company% for %invoice total%.
```

…which would achieve the same result.

So, by defining the subject heading once, in this example in AutoDoc HSE form 2, you achieve dynamic creation of the content of e-mails based on document content. Any document printed to AutoDoc HSE and directed to form 2 (via the inclusion in the document of the text '2' in white text), will have the company and invoice details of the e-mail's subject heading populated directly from the delivered document itself.

Putting it all together
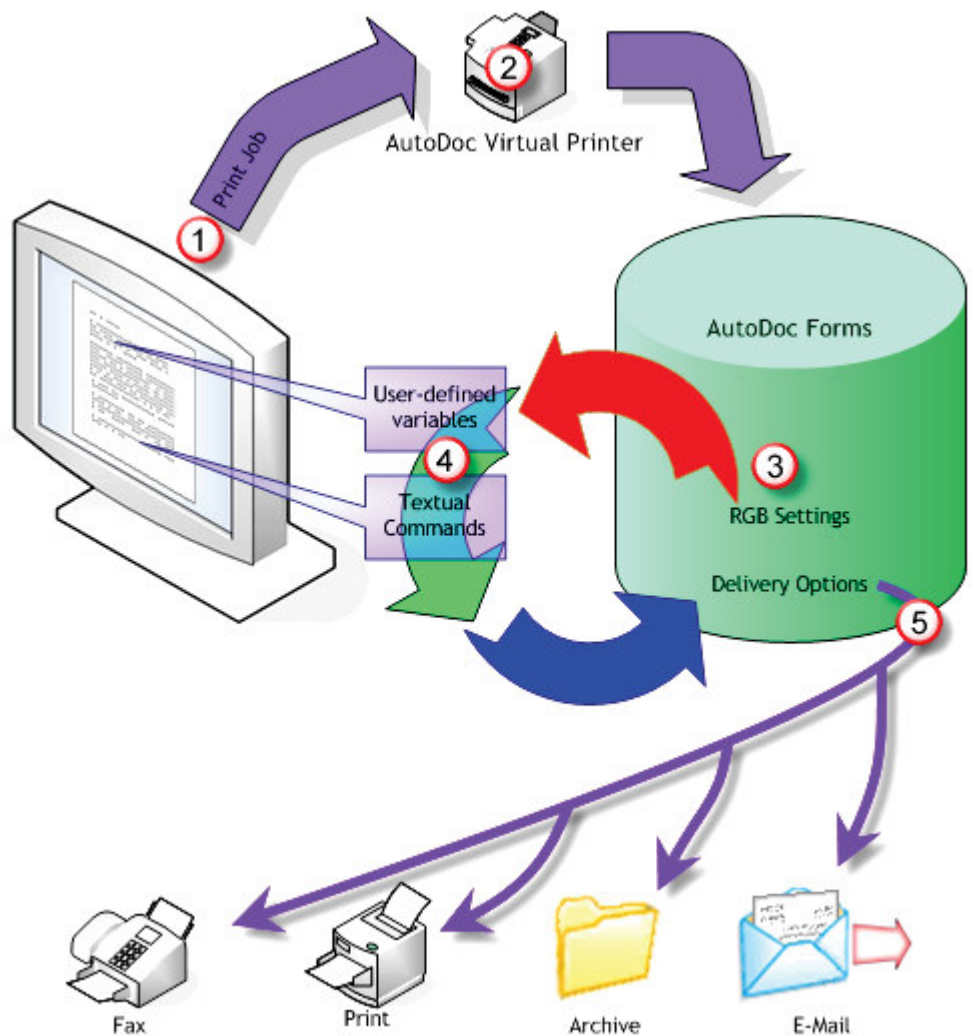
FIGURE 6 – the relationship between AutoDoc HSE's main concepts and entities.

For an example which draws together the threads of this chapter, consider AutoDoc HSE as having been configured as follows:

- with the default settings, so that any text with RGB settings of 255,255,255 (=white) is recognised by AutoDoc HSE as a textual command, and text with RGB settings of 1,1,1 (not quite black) as variable 1.

- The text 'Tax Invoice' in RGB 0,0,0 has been configured as a translation, representing the AutoDoc HSE command '3'.

- Form 3 has variable 1 renamed as 'account name', and has an e-mail subject as follows: `Invoice for %account name%.`

An invoice is produced from your accounting application. The invoice includes the following, in white (therefore invisible) text:

- 'recipient@host.com'

- '123456'

The invoice also includes the debtor name, 'ABC Automotive', in text of RGB 1,1,1. This text appears as normal black text to the human eye. The words 'Tax Invoice' appear at the top of the invoice.

If this invoice is printed to an AutoDoc HSE printer, the following occurs:

- AutoDoc HSE recognises the text 'Tax Invoice', and translates it as representing the AutoDoc HSE command '3'. AutoDoc HSE therefore registers that it must apply the pre-configured settings from form 3 to this page.

- AutoDoc HSE creates an e-mail with the subject heading 'Invoice for ABC Automotive' (as specified in form 3), attaches a copy of the invoice, and sends it to 'recipient@host.com'.

- AutoDoc HSE creates a fax of the invoice, for the fax number 123456, and sends it to your nominated fax service to be placed in the queue.

AutoDoc HSE can also perform other deliveries such as archiving and printing, and all of the delivery methods are extensively configurable. These options are detailed in the next chapter.

This chapter has covered the basic concepts of how AutoDoc HSE works, but there are a number of different ways of achieving similar ends, as well as more powerful and advanced features. Some alternative approaches and extra features can be found in chapter 8, starting on page 197.

Configuration

Configuring the settings within the AutoDoc HSE application is one key to a successful system. This chapter provides detail on what the AutoDoc HSE application's settings do, to help you configure them to suit your requirements.

The AutoDoc HSE application is arranged as a multiple view and multiple tab console. Together with a brief overview and discussion of configuration considerations, this chapter details the content of each of the setup areas, and is divided into the following main sections:

- Overview

- Considerations

- Global configuration

- Form configuration

Overview
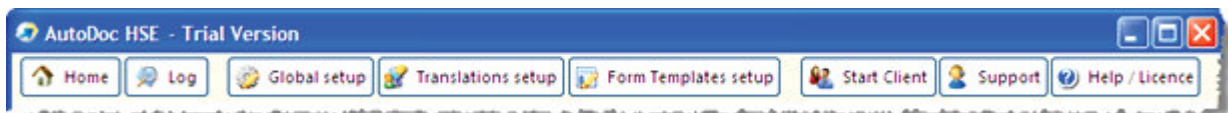
FIGURE 7 - *the navigation buttons in AutoDoc HSE's application home page.*

The AutoDoc HSE application is purely a configuration and management console, used to define how print jobs should be handled. The console itself produces no functional output – this is the role of the AutoDoc HSE 'virtual printer'.

Each area in the application view relates to a specific area of functionality or configuration. Descriptions of these areas are grouped here based on whether they affect the whole AutoDoc HSE system, or specific forms within that system. The views launched by the buttons depicted in Figure 7 above are detailed in this manual in the following way:

 Log – detailed in chapter 7 entitled "Client viewers", starting on page 179. The log view appears as follows:
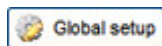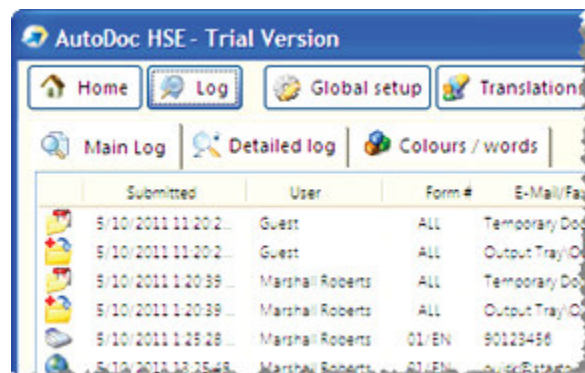
 ▪ *Global setup* – detailed in this chapter, in the section below, entitled "Global configuration", starting on page 51. The global setup view appears as follows:
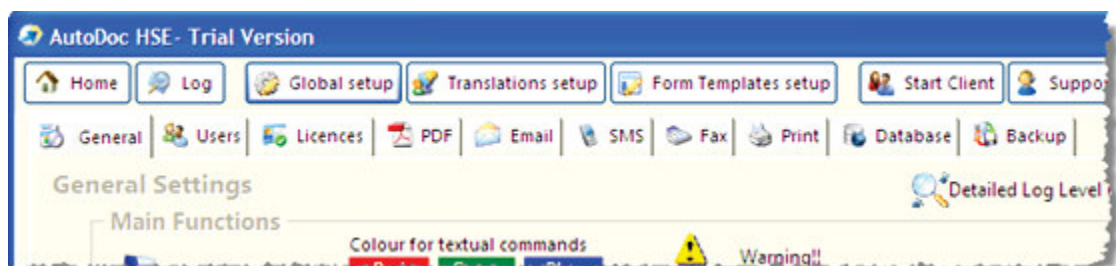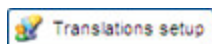
- Translations setup – detailed in this chapter, in a sub-section of the Form configuration section later in this chapter, entitled "Translations setup", starting on page 88. The Translations setup view appears as follows:
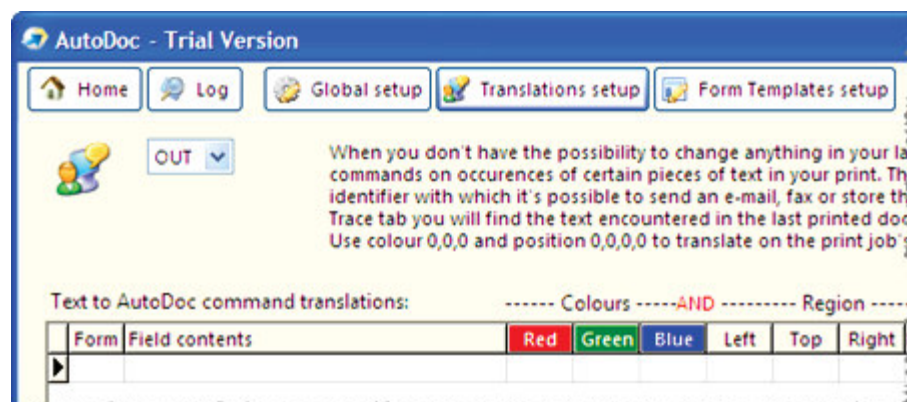
- *Form Templates setup* – detailed in this chapter, in the section entitled "Form configuration" starting on page 88. The form templates setup view appears as follows:
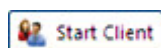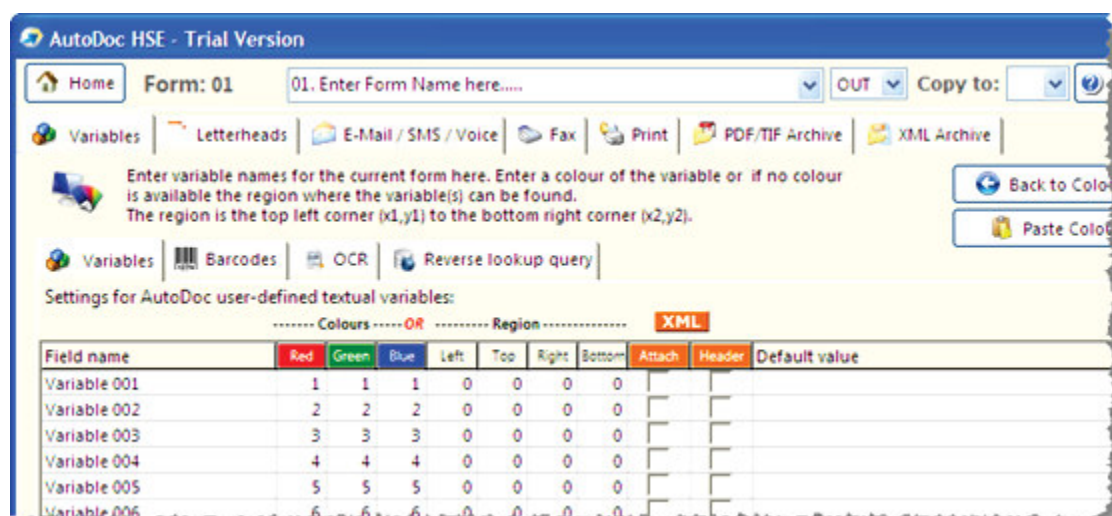
- *Start Client* – starts a local copy of the AutoDoc HSE client for the logged in user.
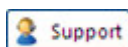
- *Support* – starts the remote support tool, which, with your permission, can allow Streamline Software staff to access your computer remotely to assist in troubleshooting issues.

- *Help/Licence* – detailed in chapter 7 entitled "Client viewers", starting on page 179. The help/licence view appears as follows:

The function of every control in the AutoDoc HSE application is described in detail in the areas noted above.

Note that in addition to the reference information provided in this manual, many AutoDoc HSE controls have 'tool tips' which display brief information/instructions associated with those controls. To activate a tool tip, move the mouse pointer over a control and let it remain stationary for a second or two.
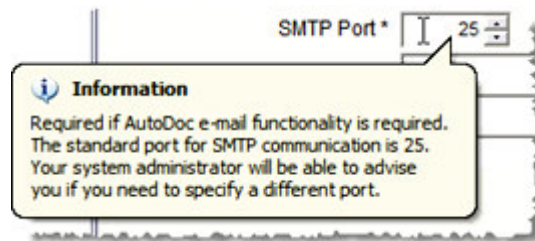
FIGURE 8 – tool tips.

Considerations

When preparing to configure forms, there are some important points to take into consideration.

Default form

The form number under which a print job is processed can be specified in a number of ways:

- The document itself can include a form number (as either a textual command or a translation).

- The AutoDoc HSE printer can have a form number specified.

Specifying a form number on the printer is achieved by adding a form number indicator to the printer's properties dialogue:
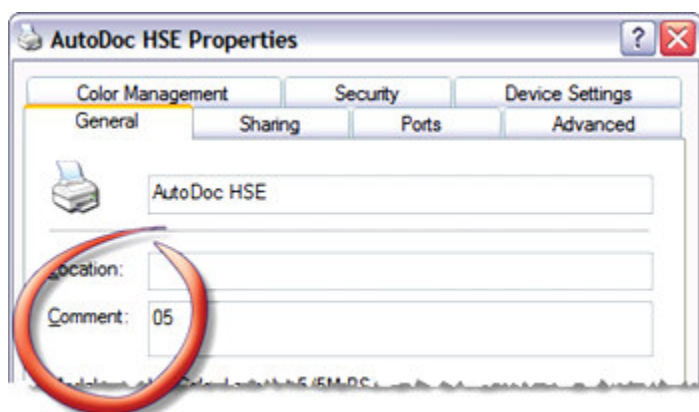
FIGURE 9 – showing an AutoDoc HSE virtual printer's properties dialogue. The indicator in the *Comment* control is 05. If the 05 text were changed to 12, any print jobs sent to AutoDoc HSE via this printer, would be processed by form 12.

If a print job is received by the AutoDoc HSE virtual printer, and no form number is specified in the document, the default form is applied.

The default form is determined using the following hierarchy:
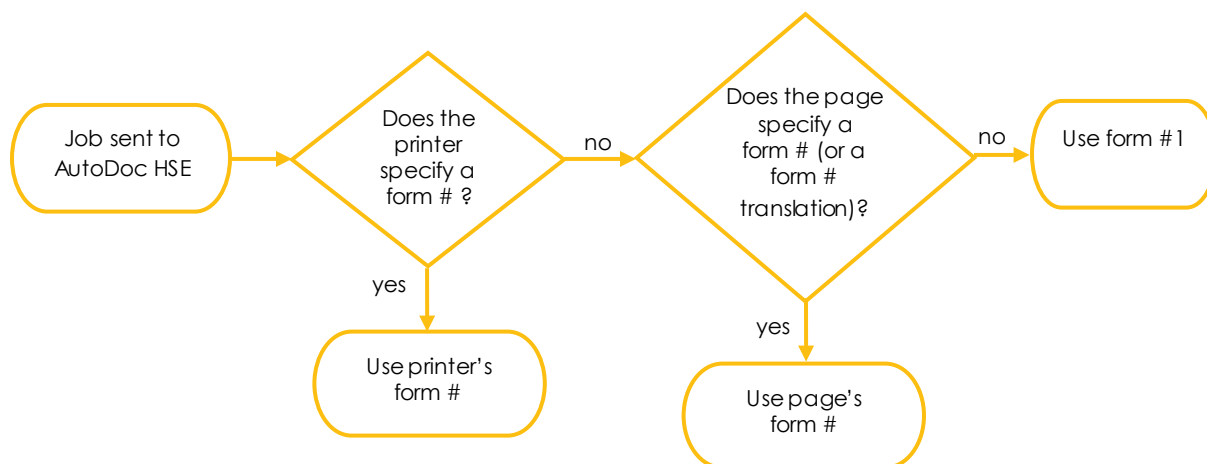
FIGURE 10 - showing the hierarchy of form numbers that are used when a job is sent to the AutoDoc HSE printer.

For example, if a page has an e-mail address textual command, but no form number, and no form number is specified on the printer either, the document will be sent to that e-mail address in the format specified by form 1. Similarly, if a document has no textual commands whatsoever, but is sent to the AutoDoc HSE printer, it will still be processed by form 1.

Note that, for print jobs with multiple pages, form numbers for a page may be 'inherited' from a previous page in the print job. See page 156 for more information on the rules applied to multi-page documents.

Note also that the default form may include archive and/or hard copy printing commands, as well as extra fax numbers or email addresses. This can mean that a job sent to the AutoDoc HSE printer may be printed, archived, emailed and faxed to recipients, even when those commands were not specified in the document itself.

If you consider accidental printing to the AutoDoc HSE printer to be a significant risk in your organisation, you should configure the default form (and any form number in the printer's comments) with this in mind.

Generic or specific?

Because the user-defined variables can apply on a per-form basis, the number of user-defined variables is potentially increased by a factor equal to the number of forms available in your edition of AutoDoc HSE. For the enterprise edition, this means a factor of 99 (since there are 99 forms available).

For example, %variable 1% in form 1 may conceptually represent 'Document Type', while in form 2 and its associated documents, %variable 1% may represent a very different concept, such as 'Salesrep'. Indeed, in form 1 the first user-defined variable may be renamed to %doctype%, and to %salesrep% in form 2.

Such an arrangement – using the same RGB variables for very different uses in different documents – implies a requirement for a similar number of corresponding forms to be configured very differently to reflect each very different purpose. You may prefer to take the opposite approach, where user-defined variables are similar enough in meaning in all documents in which they appear, to allow one form to apply to many different document types. Keep these different approaches in mind as you experiment with form configuration.

Internal records

AutoDoc HSE does not store copies of the actual deliveries of documents. For example, you may archive a document and fax it. This configuration would provide an archive copy, but AutoDoc HSE does not keep a copy of the fax. The fax can be viewed via the AutoDoc HSE log, but once the log is cleared, the temporary AutoDoc HSE copy of the fax is also deleted (see page 168 for more information on the log). However, your nominated fax service may store a copy of sent items independently of AutoDoc HSE.

The same is true of e-mails sent by AutoDoc HSE – nothing is stored in AutoDoc HSE for these deliveries, beyond the temporary files associated with the log. Your

MAPI service, if used, may store copies of sent items independently of AutoDoc HSE.

Options for file storage via AutoDoc HSE are as follows:

1. E-mails can be CC'd or BCC'd to an internal AutoDoc HSE user. This results in another user (potentially the original sender) receiving an e-mail with the same format and content as that received by the original recipient. This is a form-specific setting.

2. Fax copies can be faxed to internal users (potentially the original sender). This could be achieved using textual command fax numbers in the document, or using an indicator in the AutoDoc HSE printer name (see Figure 33 on page 204 for an example of such an indicator).

3. A copy of the delivered document can be archived as a PDF. Note that this option only stores a copy of the delivered document, not the accompanying documentation such as a fax cover page or e-mail text. This is a form-specific setting, and the main advantage is that the location and filename of the document can be dynamically constructed based on document content. The inclusion/exclusion of a letterhead is also an option.

✘ Lite
✘ Standard
✘ Server
✓ Enterprise

4. The archive function also allows a third-party application to be invoked for document management purposes.

5. Printed copies of the delivered documents can be automatically produced. This option produces a hard copy of the source document itself. This is a form-specific setting. The inclusion/exclusion of a letterhead is also an option.

File locations and references

AutoDoc HSE utilises user-defined file paths, locations, and printers on a 'dynamic' basis (that is, as it processes a print job) for several purposes including letterheads, archiving files, printing, and locating file attachments.

Wherever possible, aim to use file locations that are local to AutoDoc HSE – that is, locations that are on the same machine as the one on which AutoDoc HSE is installed. This allows you to use local paths for files, rather than other, more risk-laden methods.

For example, AutoDoc HSE will easily locate the following resource, assuming the C:\ drive is the drive on which AutoDoc HSE is installed:

```
C:\art\letterhead\AutoDoc HSE.jpg
```

However, a file path which involves a network drive, for example, may not be able to be accessed due to the network location being unavailable. For such reasons, we recommend that file locations should be 'as local as possible' to AutoDoc HSE. Where it is not possible or practical to use local paths, use full UNC (Universal Naming Convention) paths, ensuring the location is appropriately shared.

For example, use:

```
\\FinanceData\Archives\Invoices\
```

...rather than referring to the Archives sub directory of the FinanceData machine by its mapped drive letter 'H':

```
H:\Invoices\
```

Note that AutoDoc HSE will be unable to access *any* remote resources for processing, unless the additional user service is running, as discussed in the "Running an additional service" section starting on page 18. Even with the service installed, AutoDoc HSE will not recognise mapped drive letters, so UNC paths should always be used.

Global configuration

The following sections describe the areas of the AutoDoc HSE application which are concerned with the overall AutoDoc HSE system, and as such are found within the application by clicking the *Global setup* button.
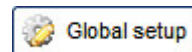
The global setup 'header'

The global setup view includes controls which always remain visible within this view. These controls are highlighted in Figure 11 below:
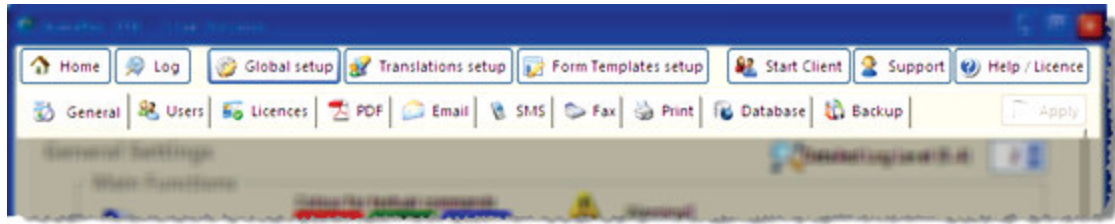
FIGURE 11 - showing the group of controls collectively known as the global setup header.

The following table provides detail for each of the controls in the global setup header:

Control Name	Control Description
Home	Use this button to move back to the home page.
Log	Use this button to move to the log (see page 168 for more information on the log).
Global setup	Use this button to move to the global setup area (defined from page 54 in this document).
Translations setup	Use this button to move to the translations setup area (defined from page 88 in this document).
Form Templates setup	Use this button to move to the form setup area (defined from page 88 in this document).
Start Client	Use this button to start the AutoDoc HSE client viewer for the current AutoDoc HSE user.
Support	Use this button to initiate a remote support session to enable Streamline Software staff to assist you with support requests.
Help/Licence	Use this button to move to the Help/Licence area (defined from page 177 in this document).
Tab strip	These tabs separate the global setup area into different control groups based on their function. Each of the tabs in this group has its own heading in this section of the manual (for example, the General tab is described in detail under the "General" heading on page 54).
Apply	Use this button to apply the changes made to all areas within the AutoDoc HSE console. Note that this button

is only available if an unapplied change has been made to the displayed data. Some changes will also be applied automatically if you move to another area of the application (for example, changes are applied automatically if you move between form #1 and form #2).

General

The General tab is part of the global setup view, and is used to specify miscellaneous settings, including the font colour that AutoDoc HSE treats as designating textual commands.
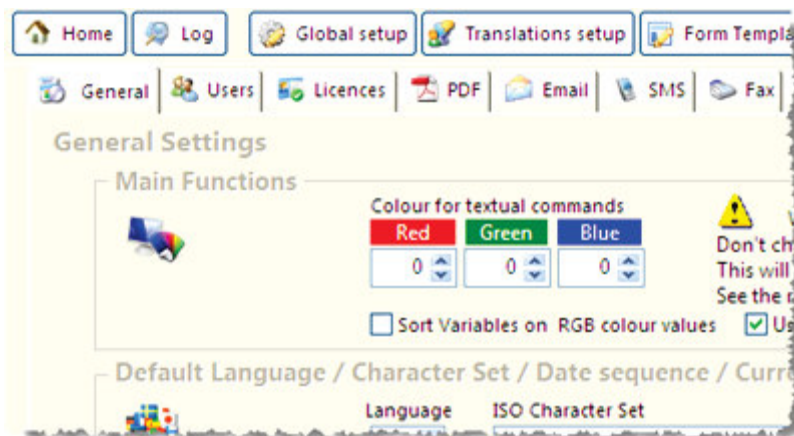
The following table provides detail for each of the controls in the *General* tab:

Control Name	Control Description
Detailed Log Level	Use this text control to specify the level of detail (0 for least, 4 for most) written to the log by AutoDoc HSE when processing documents. This setting only affects the *Detailed log* tab in the Log area.
Red	Use this text control to specify the Red component of the RGB setting that AutoDoc HSE will use to identify textual commands. Numbers can be manually entered, or increased or decreased via the up and down buttons. A minimum of 0 and a maximum of 255 (as much red as possible) are allowed.
Green	Use this text control to specify the Green component of the RGB setting that AutoDoc HSE will use to identify textual commands. Numbers can be manually entered, increased or decreased via the up and down buttons. A minimum of 0 and a maximum of 255 (as much green as possible) are allowed.
Blue	Use this text control to specify the Blue component of the RGB setting that AutoDoc HSE will use to identify textual commands. Numbers can be manually entered, increased or

	decreased via the up and down buttons.
	A minimum of 0 and a maximum of 255 (as much blue as possible) are allowed.
Sort Variables on RGB colour values	This checkbox would only be used in highly-specialised mail-merging configurations (see page 213 for details on mail merging), and for most users should always remain cleared.
Use Client Viewers	Use this to indicate that your organisation will be using client viewer functionality for individual AutoDoc HSE users (see page 180 for more details). If this checkbox is cleared, log files will no longer be written to individual user folders (which by default are located in `C:\AutoDoc HSE\userdata\`)
Archive (a copy of) files with Log	If log files are used, this checkbox gives the option of storing a temporary archive copy of the files to which the log makes reference. These files are then accessible from within the client viewer, by double-clicking on a log record. The archive's default location is `C:\AutoDoc HSE\userdata\<user>\Temporary Documents`
	The archive is cleared if the log is cleared from within the client viewer.
Language	Use this drop down list to choose the default language AutoDoc HSE will apply when no textual command language is specified in the document (see page 32 for an introduction to the language textual command).
ISO Character Set	Use this drop down list to choose the default ISO character set AutoDoc HSE will use for on-screen display and deliveries. The default setting is ISO-8859-1 (Latin 1).
Date sequence	Use this drop down list to choose the date format that will be used in strongly-typed date variables, which can then be used for XML output. See page 200 for more information on strongly-typed date variables.
Currency	This control is not used in the current release of AutoDoc HSE.
License / Share on	Use this control to choose the method of distinguishing users for licensing. Licensing on machine name will use the name of the machine which sends print jobs to AutoDoc HSE as the basis for licensing (this setting is intended primarily for processing PCL print jobs, rather than Windows-based print jobs), while licensing on user name will result in the Windows user name of the person sending print jobs to AutoDoc HSE being used as the basis for licensing.

Note that this setting should not be changed except as part of initial implementation. Please contact Streamline Software support if you see a need to change this setting in a production environment.

Get User Name from print stream	Under some configurations, print jobs may all be submitted under a common user name, such as 'Guest'. In such a case, a specific user name may still be available as meta data within the print stream itself. This checkbox can be used to source the username from the print stream.

Note that this setting should not be changed except as part of initial implementation. Please contact Streamline Software support if you see a need to change this setting in a production environment.

Administrator's E-Mail Address	Use this text control to enter the e-mail address to which you would like notifications of errors to be sent. It is suggested that the recipient should be the AutoDoc HSE administrator. See the section on "Administrator's error notifications", on page 165, for more details on the notifications delivered under this function.
User Name	This drop down control is used to choose a Windows user profile under which the optional user service will be created. See page 18 for more details on the benefits of running an additional service, as well as recommendations for use. Text can be entered directly in the control, but using the drop down list to select an existing user profile is recommended.
Password	This text control is used to enter the Windows user password for the profile under which the optional user service will be created. See page 18 for more details on the benefits of running an additional service, as well as recommendations for use.
Domain	This text control is used to enter the domain of the profile under which the optional user service will be created. See page 18 for more details on the benefits of running an additional service, as well as recommendations for use.
Test Login	Use this button to test the login credentials supplied in the *User Name*, *Password*, and *Domain* controls, to ensure the

credentials provide a successful login, prior to using the *Install Service* button.

Install Service	Use this button to install the user service. The service is called "AutoDoc HSE Print/Scan services", and the associated process is called "AutoDocHSEService.exe". This button is only enabled when it has not already been used to install a service (that is, if the button is disabled, to enable it again, you need to use the *Uninstall Service* button). You can check whether the service is running by opening the Services tool (via Start | Control Panel | Administrative tools | Services), or by using AutoDoc HSE's *Services Console* button.

Uninstall Service	Use this button to uninstall the user service. Note that AutoDoc HSE will only be able to access local network resources if the user service is uninstalled. Uninstalling a service for an existing AutoDoc HSE implementation will prevent successful processing, if any of your AutoDoc HSE forms are configured to access remote resources. This button is only enabled if the service has been installed.
Services Console	Use this button to launch the Windows services console, through which you can check whether the AutoDoc HSE Print/Scan Service is running, and manually configure the login details and start the service, if necessary. This button is only enabled if the service has been installed.
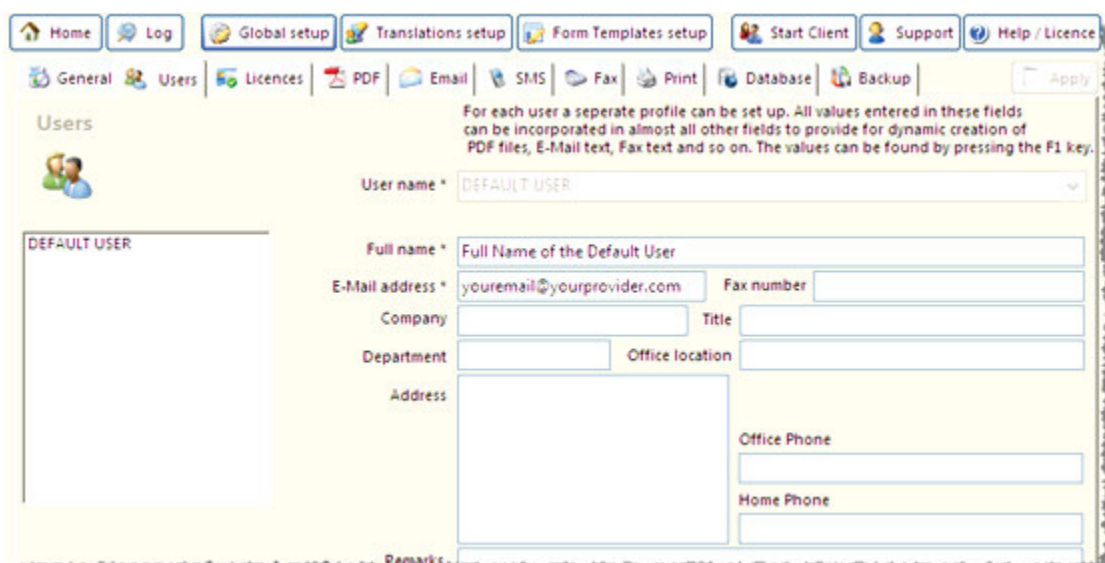
Users

The Users tab is part of the global setup view, and is used to define a profile for each of the users who will be using the AutoDoc HSE printer.

Note that AutoDoc HSE handles user information on a Windows profile login basis – the user's details are linked to their Windows login name.

Any users for whom personal details need to be available to AutoDoc HSE (for example, name and e-mail address), must have their Windows login username recorded within AutoDoc HSE as an AutoDoc HSE username. Any print job which is directed to AutoDoc HSE from a username which is not recorded within AutoDoc HSE as a user, is treated as belonging to the AutoDoc HSE 'Default User'. The Default User is a preset user, the 'personal' details of which are user-definable. Typically, a generic set of details would be entered for the Default User (for example, the name and phone number could be the company's name and listed phone number, so that any resultant contact would be directed to your receptionist).

Note that many of the text controls on the Users tab correspond to a preset system variable. For example, the name entered in the *Full name* text control can be added to document delivery information by using the %fullname% variable. Each of the text controls has a tool tip which lists the variable name applicable to that control.

Once user information has been configured, each AutoDoc HSE user can view a personalised log containing only the deliveries associated with their username. See the section on "AutoDoc HSE client viewers (starting on page 180) for more information.

See page 229 for information regarding the number of licensed users in each version of AutoDoc HSE.

The following table provides detail for each of the controls in the Users tab:

Control Name	Control Description
Users	This list box shows all the users (equivalent to Windows login usernames) defined for use in the AutoDoc HSE system.
	To view or edit an existing record, click on a username in the list.
	Note that the scrollbar at the right of the view facilitates a record-by-record scroll through the user list.
	Users are listed alphabetically.
User name	Use this drop down list to enter the Windows login username you want to record as an AutoDoc HSE user. In the case of the Default User, this control cannot be edited.
	You can select an existing user from the list of Windows users, or create a new entry.
	This is a mandatory control for user records.
	This control's variable name is %username%.
Full name	Use this text control to enter the full name of the person who uses the Windows login username specified in the *User name* control.
	This is a mandatory control for user records.
	This control's variable name is %fullname%.
E-Mail address	Use this text control to enter the e-mail address of this user. This address can then be used as a Carbon Copy ('CC') or Blind CC ('BCC') e-mail address for document delivery.
	This is a mandatory control for user records.
	Note that, for SMTP, depending on your SMTP policy, the e-mail address entered here may need to be associated with the SMTP host specified on the global setup E-Mail tab. Many Internet Service Providers validate the domain name of a sender's e-mail address, which will result in e-mails sent from an AutoDoc HSE

	user being rejected if the domain specified is not that of the SMTP host (or indeed if the username component of the e-mail address doesn't correspond to an existing user of that domain).
	This control's variable name is %emailaddress%.
Fax number	Use this text control to enter the contact fax number applicable to this user.
	This control's variable name is %faxnumber%.
Company	Use this text control to enter the company name.
	This control's variable name is %company%.
Title	Use this text control to enter the user's title/position description.
	This control's variable name is %title%.
Department	Use this text control to enter the department within the company to which this user belongs.
	This control's variable name is %department%.
Office location	Use this text control to enter the location of the user's office. Note that there is another control for the user's postal address, so office location could be used to specify a floor number, a building name, or a combination of such information.
	This control's variable name is %officelocation%.
Address	Use this text control to enter the user's address. This can be a multi-line entry including all data in a postal address such as postal/zip code.
	This control's variable name is %address%.
Office phone	Use this text control to enter the office contact number of the user.
	This control's variable name is %officephone%.
Home Phone	Use this text control to enter the after hours contact number of the user.
	This control's variable name is %homephone%.
Remarks	Use this text control to record miscellaneous information for the user.

	This control's variable name is %remarks%.
User Printer (#1-4)	Use these drop-down lists to specify the real printers to which this user's documents may be printed.
	The printers available in the list will be determined by whether the AutoDoc HSE user service is running (see page 18 for more details on the user service). If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed.
	The information in these controls is used by another setting in the Print tab of the form templates setup area, as an option to print a copy of documents to the printers associated with the user who created the print job.
	The printers specified here can also be overridden by preferences specified on the client viewer (see the section on the setup view of the client viewer starting on page 193).
✚	Use this button to insert a new user record for editing, and to save that new record and insert another new record.
	Records are listed alphabetically.
▬	Use this button to delete the record of which the details are currently displayed. You will be prompted to confirm your action.
	This button is not available if the details displayed are for the Default User, as the Default User cannot be removed from the system.
✖	Use this button to discard changes made to the details displayed.
Copy from Default User	Use this button to populate any blank controls in the current details with the values for these controls specified for the Default User. Note that using this button does not copy the *User name* or *Full name* of the Default User.
User file location	Use this text control to specify the directory to which user-related AutoDoc HSE files will be saved as part of delivery processing. You need not change from the default location unless you have a specific reason to do

so. You can either enter text directly in the control, or use the browse button to the right of the control, to open a browse dialogue.

Note that the permissions settings for the user file location must allow all users to read and write to this directory. By default, AutoDoc HSE creates the user file directory as a shared directory, and if you change the location from the default, you may need to set the sharing properties of the folder to allow access. AutoDoc HSE will not be able to process documents if the user data folder is not shared.

Also note the important information regarding file locations on page 50.

Licenses

The Licenses tab is part of the global setup view, and is used to manage the list of licensed users (or machines, if you have opted to license based on machine name, rather than user name, as specified in the General tab). The maximum number of users/machines that can be licensed within AutoDoc HSE depends on the version purchased. The number of users/machines initially allowed within the system also varies between versions (see Appendix A for more information).
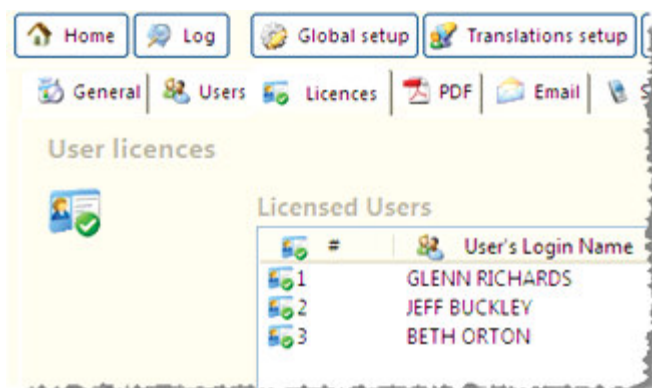
The following table provides detail for each of the controls in the Licences tab:

Control Name	Control Description
User Nr	This column displays the user number associated with the user or machine in the right column. User numbers within the allowed user count have a green check icon, while any users above the allowed count have a red cross icon. Depending on your version of AutoDoc HSE, you can increase your user count either by purchasing an additional user pack, or by upgrading to another version of AutoDoc HSE.
User's Login Name *Machine Name*	The right column of the licensed users/machines table lists the names of the users/machines you intend to use as a licensed AutoDoc HSE user/machine. This list is populated via the *User name/Machine name* text control.
User name *Machine name*	This text control is used to enter the name of a user/machine you wish to use with AutoDoc HSE. In the case of users, the name entered should match the Windows login name.

	The name entered here is reproduced in the *User's Login Name/Machine Name* column, for the currently selected record.
New User *New Machine*	This button is used to open a new row in the list. When a new row opens, the *User Nr* column displays whether the new user/machine can be accommodated within the current licence count.
Delete User *Delete Machine*	This button is used to delete the currently selected record from the list. You will be prompted to confirm the deletion.

PDF

The PDF tab is part of the global setup view, and is used to specify preferences for PDF files generated by AutoDoc HSE. This includes options for quality, security, watermark/letterhead positions, and digital signatures (see page 112 for more details on digital signatures).
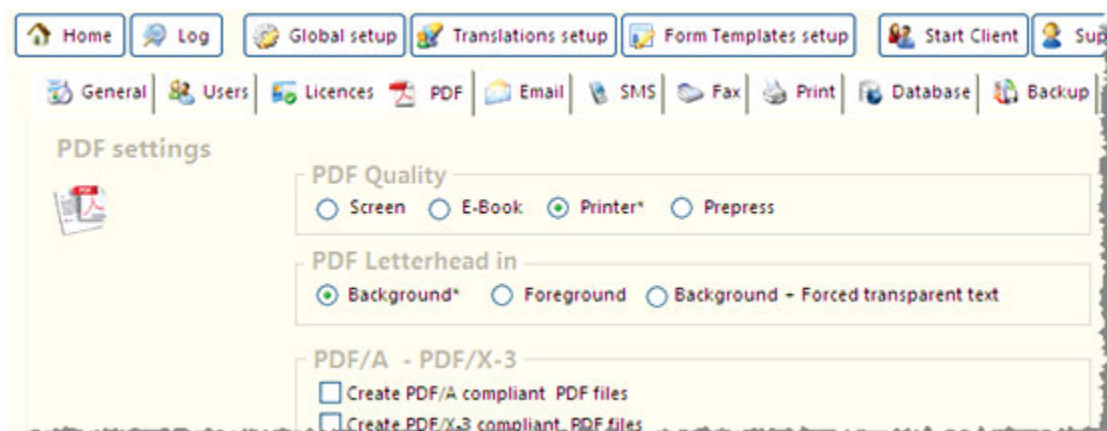
The following table provides detail for each of the controls in the PDF tab:

Control Name	Control Description
PDF Quality	This group of option buttons is used to specify the quality of the PDF output produced by AutoDoc HSE. *Screen* represents the lowest quality, while *Prepress* represents the highest quality.
	Note that the file size of the PDF output will be affected proportionally by the quality option selected.
	The default selection is *Printer*.
PDF Letterhead in	This group of option buttons is used to specify how AutoDoc HSE includes letterheads applied to PDFs. Depending on your document content, letterheads in the background may be overwritten by document content, while letterheads in the foreground may overwrite document content if created without transparency. It is recommended that you experiment with letterhead positioning, and foreground/background options, when configuring AutoDoc HSE.
	The default selection is *Background*.
Create PDF/A compliant PDF files	This checkbox is used to specify that PDF outputs produced by AutoDoc HSE should be created under the

A PDF subset standard.

Note that the *Create PDF/A compliant PDF files* and *Create PDF/X-3 compliant PDF files* functions are mutually exclusive.

Create PDF/X-3 compliant PDF files	This checkbox is used to specify that PDF outputs produced by AutoDoc HSE should be created under the X-3 PDF subset standard. Note that the *Create PDF/A compliant PDF files* and *Create PDF/X-3 compliant PDF files* functions are mutually exclusive.
Embed All Fonts	This checkbox is used to specify that PDF outputs produced by AutoDoc HSE will include the full font sets of the fonts used. This setting will make file sizes larger, but will help layout consistency.
Directory (Default Document Root)	This text field is used to specify a location which will serve as the root of a default document location for archiving PDF files, which can be referred to by the variable %documentroot%
Default Owner Password	This text control is used to specify the default owner password which will be applied to PDF documents for deliveries when PDF security permissions are specified. The Default Owner Password is used to protect PDF documents whenever a specific delivery has been configured to disallow users all access. For example, the following settings on the E-mail / SMS / Voice tab of the Form Templates setup area, would result in the owner password being applied (since not all the checkboxes are checked): The default value for this control is derived from the Windows serial number.
Input	This text control is used to specify the input folder for digitally signing e-mail attachments produced by AutoDoc HSE. See page 112 for more details on digital

	signatures.
Output	This text control is used to specify the output folder for digitally signing e-mail attachments produced by AutoDoc HSE. See page 112 for more details on digital signatures.
Signing Timeout	This text control is used to specify the maximum duration, in seconds, which can elapse during the digital signing process, after which a failure notice will be sent to the originating user. See page 112 for more details on digital signatures.

E-Mail

The E-mail tab is part of the global setup view, and is used to specify the E-mail protocol AutoDoc HSE should use by default (SMTP or MAPI), as well as any associated settings required.

> Note that if you intend to use MAPI e-mail, you will need to run the client viewer on the machines which will be sending print jobs to AutoDoc HSE. See page 180 for more information on the client viewer.

Note that even if you do not intend to use AutoDoc HSE to generate e-mail, AutoDoc HSE uses settings from this tab to:

- Provide e-mailed feedback regarding any errors (as per the *Administrator's E-Mail Address* control, defined on page 56)

- Use an SMS gateway service to deliver SMS messages

- Use a fax gateway service to deliver fax transmissions.
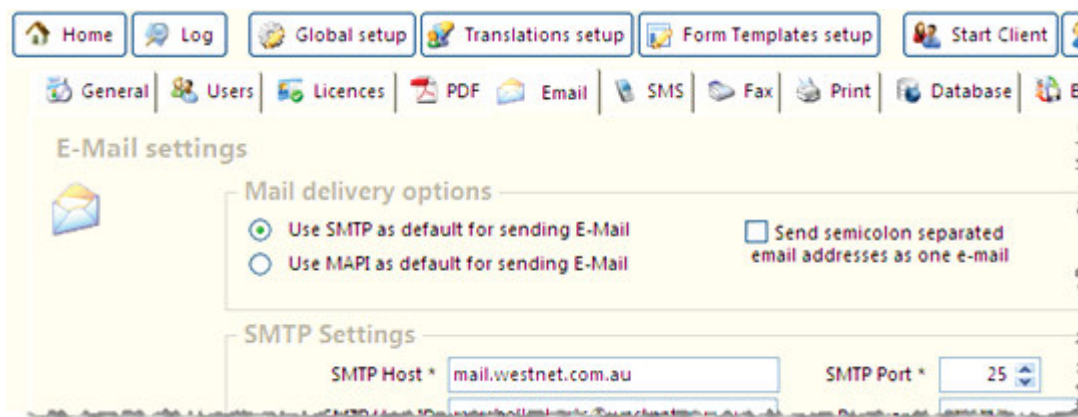
The following table provides detail for each of the controls in the E-Mail tab:

Control Name	Control Description
Mail delivery option	This group of option buttons is used to specify the protocol under which AutoDoc HSE will deliver e-mail by default. Selecting *Use SMTP as Default for sending E-Mail* enables the *SMTP Settings* control group, and the *Enable SSL* checkbox, whereas selecting *Use MAPI as Default for sending E-mail* disables these controls.
	Note that this default protocol can be overridden on a form-by-form basis, as part of the configuration of the

form setup E-mail / SMS / Voice tab.

The default selection is *Use SMTP as Default for sending E-Mail.*

If you intend to use MAPI e-mail, you must also run the client viewer (see page 181) on the machines which will be using the AutoDoc HSE virtual printer, and ensure that Outlook's Exchange Server Settings have the *Use Cached Exchange Mode* checkbox cleared (see the Streamline Software support knowledgebase for more information).

Send semicolon separated e-mail addresses as one e-mail	Use this checkbox to specify that AutoDoc HSE should treat semicolon separated e-mail addresses as one e-mail delivery, to the multiple addresses.
	A print job directed to AutoDoc HSE with multiple e-mail addresses would normally result in a separate e-mail being sent to each address.
SMTP Host	Use this text control to enter the name or IP address of your SMTP host. Note that, when enabled, this is a mandatory control if e-mail functionality will be used.
	This control is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.
SMTP Port	Use this text control to enter the port number used for SMTP communication. Note that when enabled, this is a mandatory control if e-mail functionality will be used.
	The default value for this control is 25, which is the standard port for SMTP use.
	This control is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.
SMTP User ID *SMTP Password*	Both of these text controls would normally be left blank. However, if, upon testing your AutoDoc HSE e-mail configuration (using the *Test Connection* button), a user ID and password are requested by the SMTP server, contact your network administrator to obtain these details, and then complete these controls.
	These controls are disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.
Send test E-Mail to:	Use this text control to enter a target e-mail address for a test e-mail.
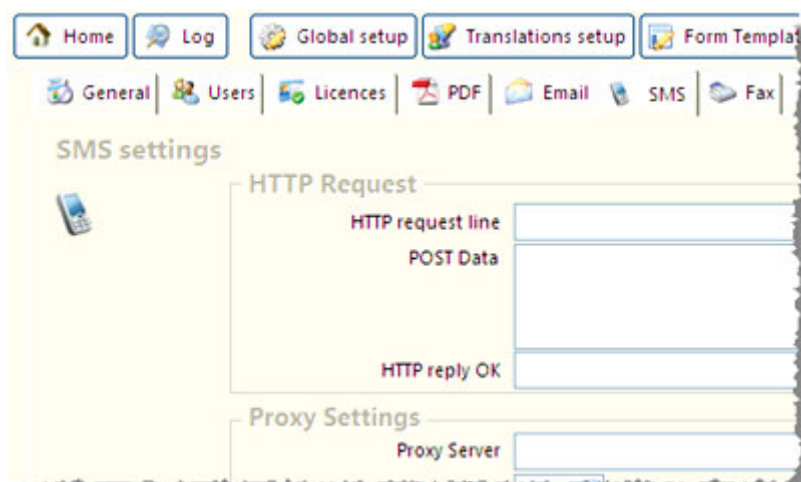
	This control is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.
Use SMTP 2.0	Use this checkbox to use AutoDoc HSE's SMTP 2.0 option for sending e-mails. This option facilitates e-mail over SSL.
Test Connection to SMTP server	Use this button to test AutoDoc HSE's e-mail configuration, once the *SMTP Host* and *SMTP Port* controls have been completed. You can optionally complete the *Send test E-mail to* control to send a test e-mail (recommended). You will be notified of whether the test was successful. This control is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.

Enable SSL (Secure E-mail)	This checkbox is used to enable e-mail transmission under Secure Socket Layers. The default setting is cleared.
	
	When SSL is required, e-mail textual commands require an SSL prefix.
	
	Note that if you elect to use SSL, the SSL textual command prefixes must be specified on an e-mail-by-e-mail basis.
	
	For example, this e-mail textual command:
	
	`info@abcautos.com`
	
	...would send a non-secure e-mail (even if you have elected to use SSL using this checkbox), while this e-mail textual command:
	
	`$SSL$info@abcautos.com`
	
	...would result in AutoDoc HSE using SSL, if configured.
	
	Note also that you can use SSL in conjunction with third-party digital signature hardware (see page 112 for more information on digital signatures), by combining the two e-mail command prefixes. For example, an e-mail command which instructs AutoDoc HSE to send a digitally signed e-mail via SSL would be as follows:
	
	`$SSL$SIG$info@abcautos.com`

Note that only three '$' symbols are required when the two prefixes are combined, not four ($SSL$$SIG$), as you may expect.

We recommend contacting Streamline Software for assistance with SSL configuration.

This checkbox is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected.

Key File	Use this text control to specify the location of the SSL key file. Enter the path directly, or use the browse button to launch a file select dialogue. Variables can be used in this control to allow different key files to be used under different circumstances.
Root Cert File	Use this text control to specify the location of the SSL root certificate file. Enter the path directly, or use the browse button to launch a file select dialogue. Variables can be used in this control to allow different root certificate files to be used under different circumstances.
Server Cert File	Use this text control to specify the location of the SSL server certificate file. Enter the path directly, or use the browse button to launch a file select dialogue. Variables can be used in this control to allow different server certificate files to be used under different circumstances.
Certificate File	Use this text control to specify the location of the PKCS#12 certificate file (in *.pfx or *.p12 format). Enter the path directly, or use the browse button to launch a file select dialogue.
Password (PDF Signing)	Use this text control to specify the password associated with the certificate file.
Request a timestamp from TSA server	Use this checkbox and text control to specify that the PDF signing should incorporate a timestamp from the specified TSA server.

SMS

The SMS (Short Message Service) tab is part of the global setup view, and is used to specify the configuration required for the third party SMS service AutoDoc HSE should use to deliver any SMS messages it creates.

When AutoDoc HSE encounters a valid SMS command, it sends a preconfigured SMS message (see the form setup item regarding SMS messaging on page 112 for more details on the SMS message) to a gateway service as a HTTP request, with the phone number and account details included as part of the request.

The SMS textual command format is:

`<RecipientPhoneNumber>`@SMS

The format of the phone number captured by AutoDoc HSE as a command can be altered 'on the fly' by AutoDoc HSE to render the phone number in the format required by the SMS gateway service (for example, to convert a 'local' number to an international number).

The following table provides detail for each of the controls in the SMS tab:

Control Name	Control Description
HTTP request line	This text control is used to specify the HTTP request that will be submitted to trigger the SMS.
	The request can contain variables.
	The format of the request line will change between different providers. AutoDoc HSE can send an HTTP request using either POST or GET methods.
	The broad format for a POST is simply the URL from which the gateway processes requests, for example, for

the voipbuster service, a POST request would be:

```
https://www.voipbuster.com/myaccount/sendsms.php
```

In the case of a POST request, the data posted to the URL is specified in the *POST Data* control.

For a GET request, the broad format of the HTTP request line would be:

```
<URL>?<parameters>
```

...where the parameters would be likely to contain account information, as well as variables to pass the SMS number and message text. For example, the request line could be:

```
https://www.voipbuster.com/myaccount/sendsms.php?
username=myname&password=mypassword&to=
%smsnumber%&text=%smstext%
```

POST Data	Use this text control to enter the data that will be posted to the gateway service as part of the HTTP request. This control would only require a value if the HTTP request uses the POST method, and would typically include account login information and content of the SMS to be sent (which can be specified using variables).

For example, the POST Data could be:

```
<?xml version="1.0"?>
<MESSAGES>
  <CUSTOMER ID="2120" />
  <USER LOGIN="myname"
   PASSWORD="opensesame" />
  <MSG>
    <FROM>AutoDoc HSE</FROM>
    <BODY TYPE="TEXT">%smstext%</BODY>
    <TO>%smsnumber%</TO>
  </MSG>
</MESSAGES>
```

HTTP reply OK	Use this text control to enter a segment of the SMS gateway's reply to a GET request, which would definitively indicate that the SMS has been sent

successfully.

This control should only be used if the *HTTP request line* is a GET method request.

For example, the voipbuster gateway will return the following text for a successful message:

```
<SmsResponse>
      <version>1</version>
      <result>1</result>
      <resultstring>success</resultstring>
      <description></description>
      <endclause></endclause>
</SmsResponse>
```

...while a particular failure message is returned as:

```
 <SmsResponse>

    <version>1</version>

    <result>0</result>

    <resultstring>failure</resultstring>

    <description></description>

    <endclause>14</endclause>

 </SmsResponse>
```

Since success and failure is clearly distinguished, the text "success" would be a suitable entry in this control, as would "<result>1</result>".

Note that a SMS may be successfully delivered, and yet still return an error in the AutoDoc HSE log, if the HTTP reply OK text is not matched with the actual reply received from the gateway.

Proxy Server *Proxy Port* *Proxy User Name* *Proxy Basic Authentication* *Password*	These controls are part of the Proxy Settings control group, and would only be used to establish an internet connection via a proxy server.
Default country code	Use this text control to enter the default country code for international dialling (for example, 61 for Australia).
International Access Number	This control can be used, optionally, to specify an international access number.
Prefix for Country	This control can be used, optionally, to specify an prefix

Code	for the country code.
	For example, the prefix "+" could be specified here.
Area code prefix	Use this text control to enter the area code prefix. This enables AutoDoc HSE to recognise numbers which include an area code.
	For example, the area code *prefix* in Australia is 0, and the area code of Sydney, Australia, is 2. Australians therefore dial 02 to reach Sydney (area code prefix + area code).
	If an area code prefix is specified, and a phone number begins with that area code prefix, it will removed from a the phone number if the *Convert number to +Countrycode* checkbox is checked.
Test number conversion	Use this text control to test AutoDoc HSE number conversion based on the configuration specified.
	Check the *Convert number to +Countrycode* checkbox and enter the phone number, as it would appear in the SMS textual command, into this control. The result is displayed in the *Result* display-only field.
	We recommend that rather than using number conversion, correctly formed numbers should always be specified as textual commands wherever possible.
Convert number to +Countrycode	Use this checkbox to specify that AutoDoc HSE should convert SMS command phone numbers using the configuration specified in this group of controls.
	If checked, AutoDoc HSE will:
	• Begin the number with any *Prefix for Country Code* value, then
	• Include any *Default Country Code* value next, then
	• Remove an area code from the start of the SMS command number, if that area code matches the *Area code prefix* value.
Test message to	Use this text control to specify a number to which a test SMS message will be sent, when the *Test Connection* button is used.
	Note that a number in this control should be in the final format required by the gateway service (that is, no number conversion takes place during the test process).

Test message text	Use this text control to enter an SMS message to test the SMS configuration.

Fax

The Fax tab is part of the global setup view, and is used to specify the fax service AutoDoc HSE should use to deliver any faxes it creates, as well as any associated settings required.

The following table provides detail for each of the controls in the Fax tab:

Control Name	Control Description
Fax program selection	This group of option buttons is used to specify the service under which AutoDoc HSE will deliver faxes. Selecting *Use Microsoft Fax and/or a T.37 Service Provider for sending faxes* enables the *Microsoft Fax Server settings* control group. Selecting *Use ActiveFax for sending faxes* disables the *Microsoft Fax Server settings* control group.
	The *Use Microsoft Fax and/or a T.37 Service Provider for sending faxes* option allows for using a local installation of Microsoft Fax (i.e. installed on the machine on which AutoDoc HSE is installed), or for a separate fax server installation.
	The default selection is *Use Microsoft Fax for sending faxes*.
E-mail feedback (Microsoft Servers only)	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	If using Microsoft Small Business Server, use this checkbox to specify that feedback on fax status should be e-mailed to the address specified in Microsoft Small Business Server.

|	
Attach fax to receipt	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	Use this checkbox to specify that a copy of the fax transmission should be stored with the receipt for the transmission.
Use Sending User's Fax number as TSID	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	Use this checkbox to specify that the fax number recorded for the user sending the fax should be passed to the fax service as the TSID (Transmitting Subscriber ID – essentially the return fax number) for the fax.
Optional Microsoft Fax Machine name	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This text control is used to enter the name of the computer on which Microsoft Fax is installed. This is an optional control, and would normally only be used if you are experiencing problems connecting to the fax service.
Test Fax	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This button is used to test whether AutoDoc HSE can connect to a fax service.
Test number conversion	These controls are part of the *Microsoft Fax Server settings* control group, and are disabled unless Microsoft Fax is the nominated fax service.
	This text control is used to enter a fax number, to see how it would be converted as a result of the codes specified in this control group.
Use Fax number conversion	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This checkbox is used to specify that AutoDoc HSE should convert fax numbers as per the codes specified in this control group.

Default Country Code	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This text control is used to enter a country code prefix that will be added to all outgoing fax numbers handled by AutoDoc HSE under this configuration, if the *Use Fax number conversion* checkbox is checked. This field could be used, for example, to dial 61 for Australia.
Area code prefix	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	Use this text control to enter the area code prefix. This enables AutoDoc HSE to recognise numbers which include an area code.
	For example, the area code *prefix* in Australia is 0, and the area code of Sydney, Australia, is 2. Australians therefore dial 02 to reach Sydney (area code prefix + area code).
	If an area code prefix is specified, and a phone number begins with that area code prefix, it will removed from a the phone number if the *Use Fax number conversion* checkbox is checked.
International Access Number	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This control can be used, optionally, to specify an international access number.
Remove country code for national calls	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	Use this checkbox to specify that the country code should be removed from a converted fax number, for numbers that begin with the specified *Area code prefix*. This checkbox would only be needed if the *Use Fax number conversion* checkbox were checked.
	For example, if the Australian phone number 0362666000 is being converted to +61362666000, and this conversion is causing problems in national calls, checking the *Remove country code for national calls* checkbox prompts AutoDoc HSE to check whether the unconverted phone number includes the specified *Area*

	code prefix, and if so, to treat the number as a national call. So, if the *Area code prefix* was specified as 0 (as it would be for Australian calls), even with a default country code specified, and with number conversion turned on, AutoDoc HSE will recognise the call as a national call, and will not include the +61 prefix.
Country Output prefix	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	This text control is used to enter a prefix that will be added to all outgoing international fax numbers where the *Use Fax number conversion checkbox* is checked.
	The default value is "+".
Dialling prefix	This control is part of the *Microsoft Fax Server settings* control group, and is disabled unless Microsoft Fax is the nominated fax service.
	Use this text control to optionally add an additional dialling prefix.
Use T.37 Fax	This control is part of the *Microsoft Fax Server/T.37 settings* control group, and is disabled unless Microsoft Fax/T.37 is the nominated fax service.
	This checkbox is used to specify that a T.37 Fax service ("internet fax") will be used.
Use Cover page from MS Fax	This control is part of the *Microsoft Fax Server/T.37 settings* control group, and is disabled unless Microsoft Fax/T.37 is the nominated fax service.
	This checkbox is used to specify that the Microsoft Fax cover page specified for the delivery (on the form responsible for processing the delivery) should be applied to the T.37 Fax delivery.
E-mail Address To (T.37 Fax) *SMTP Host (T.37 Fax)* *SMTP Port (T.37 Fax)* *Use SLL (T.37 Fax)* *SMTP User ID* *SMTP Password (T.37 Fax)*	These controls are part of the *Microsoft Fax Server/T.37 settings* control group, and are disabled unless Microsoft Fax/T.37 is the nominated fax service. Use these controls to configure the T.37 .fax as per the instructions provided by your chosen provider.

Print

The Print tab is part of the global setup view, and is used to create additional AutoDoc HSE printers (which facilitates more powerful handling of heavy print loads), and to configure PCL printing. These two areas are separated into two sub-tabs:

- Printer Settings

- PCL5 Settings
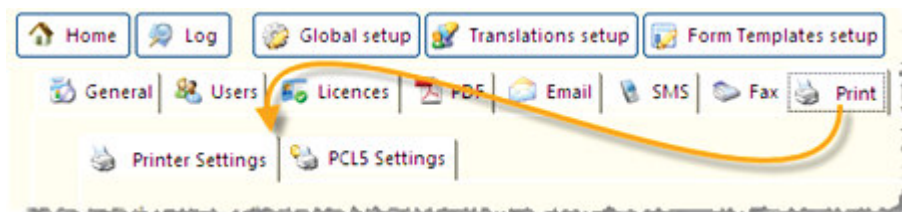
Printer Settings
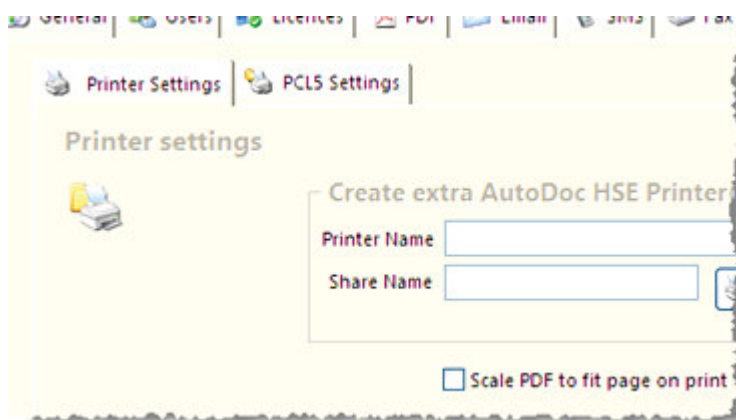
The following table provides detail for each of the controls in the Printer Settings sub-tab:

Control Name	Control Description
Printer Name	Use this text control to enter the name of the new AutoDoc HSE printer.
	Note that the name entered here should not be identical to the name of a printer already installed. If you do use the name of a printer already installed, the name of the printer created may be suffixed with `copy <ID>`, and the printer will not be created as a shared printer.
Share Name	Use this text control to enter the share name of the new

AutoDoc HSE printer. This is an optional control – if you do not enter a share name, the printer will be created as a non-shared printer.

Note that the name entered here should not be identical to the share name of a printer already installed. If you do use the share name of a printer already installed, the new printer will not be shared.

Create AutoDoc HSE Printer	Use this button to create a new AutoDoc HSE printer with the name specified. You will be prompted when the printer is installed.

✗ Lite
✓ Standard
✓ Server
✓ Enterprise

PCL5 Settings

The PCL5 Settings tab is a sub-tab of the Print tab, and is used to manage advanced print data requirements associated with older applications.
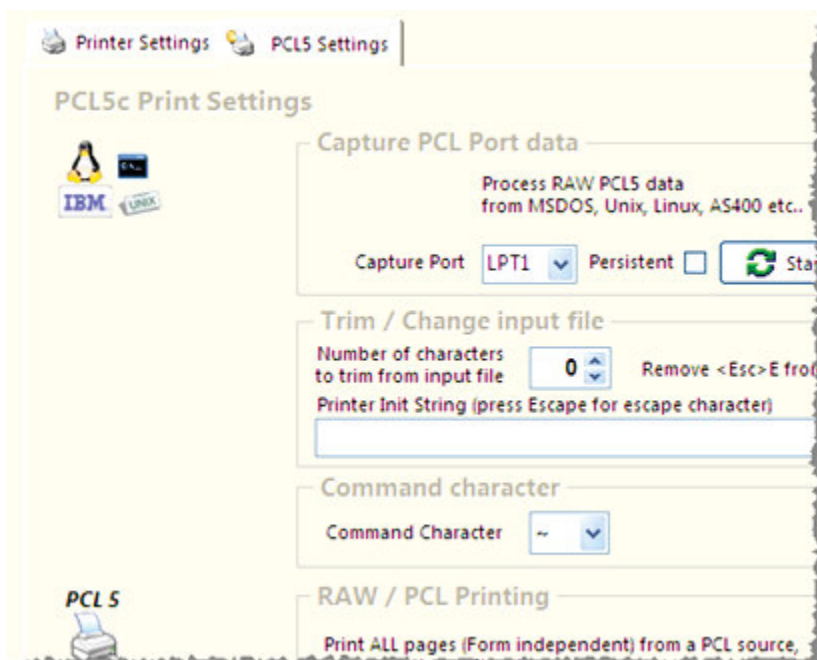
The two main functions of this tab are:

1. Input: configuring AutoDoc HSE to intercept RAW PCL5 data from a specified printer port, to enable print jobs from older (e.g. DOS-based) applications to be converted to PDF.

2. Output: specifying to where intercepted PCL data should be printed.

The following table provides detail for each of the controls in the PCL5 Settings tab:

| Control Name	Control Description
Capture Port	Use this drop down control to specify a port which should be redirected to AutoDoc HSE.
Persistent	Use this checkbox to specify that the redirection of the specified port, to AutoDoc HSE, should be persistent (that is, the redirection should still apply after a system restart).
Start Capture	Use this button to activate the redirection of the specified port to AutoDoc HSE. You will be notified of the outcome.
Number of characters to trim from input file	Use this text control to specify the number of characters to be removed from the end of a PCL5 stream. This function can prevent blank pages being produced, where the end of the PCL stream contains escape or form feed characters that will produce a blank page.
Remove <Esc>E from PCL	When included in a PCL print stream, <Esc>E will typically reset a HP compatible printer to its default settings – e.g. the factory default settings or any preprogrammed settings of the printer, such as paper size, lines per inch, character set, font etc.
	In this situation, the subsequent Escape sequences following the <Esc>E will usually set the printer to the desired state.
	However, some applications may rely on the default/pre-programmed settings of the printer, thus producing undesirable results.
	AutoDoc HSE caters for this possibility by optionally removing <Esc>E from the print stream altogether, so that the AutoDoc HSE printer will not be reset to the default state. Together with the *Printer Init String* setting, this configuration ensures the printer is set to the desired state, and will keep it that way until the print job is completed.
	If mixed PCL5 streams are sent to the printer, only the print streams that do not contain a Printer Job Language (PJL) command (such as <esc>%-

`12345X@PJL......`) at the beginning of the stream (signaling a well formed print job) will be modified by trimming and removing characters as well as putting the *Printer Init String* setting in front of the print stream.

Printer Init String	This text control can be used to insert a string into the PCL print spool data.
	For example, adding…
	`<esc>&l8.00C`
	…to this control, sets the printer to 8 lines per inch.
	The typical 'escape' character (ASCII 27 or HEX 1B) for PCL5 can be inserted by typing `<esc>` or by pressing the Escape keyboard key when the control has focus, and AutoDoc HSE will insert the escape character at the cursor.
Command Character	Use this drop down list to specify the character that will be used to denote an in-text PCL command or variable (see page 198 for more information on using PCL variables). The default setting is the ampersand (&) character.
RAW / PCL Printing	Use this checklist to select the printers with which AutoDoc HSE should create output from RAW print jobs. All pages of the print job will be sent to the selected printers.

Database
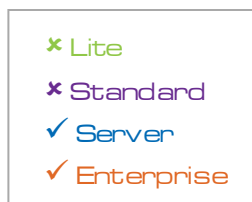
The Database tab is part of the global setup view, and is used to specify a database from which information can be dynamically retrieved to aid in, or add content to, the delivery of AutoDoc HSE-delivered documents.

All controls on this tab are optional, and would only be used if the reverse lookup queries function is required (see page 206 for more details).
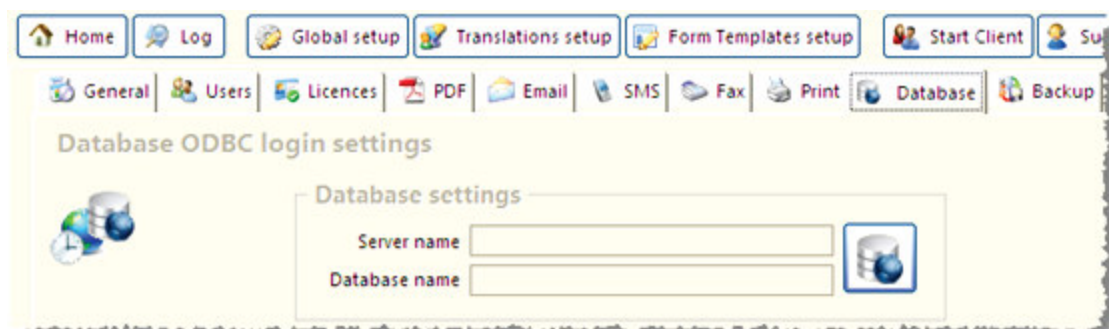
The following table provides detail for each of the controls in the Database tab:

Control Name	Control Description
Server name	This text control displays the name of the database server which AutoDoc HSE should connect to for reverse lookup queries. The control is populated via the ODBC Connection Settings button.
Database name	This text control is used to enter the name of the database which AutoDoc HSE should connect to for reverse lookup queries. The control is populated via the ODBC Connection Settings button. Note that the variable `%dbname%` can be used here (see page 209 for more information).
ODBC Connection Settings	This button is used to launch a dialogue box in which an ODBC connection string can be created, which AutoDoc HSE can use to access an external database for reverse lookup queries.

Backup

The Backup tab is part of the global setup view, and is used to manage tasks associated with the backup and restoration of AutoDoc HSE configurations.
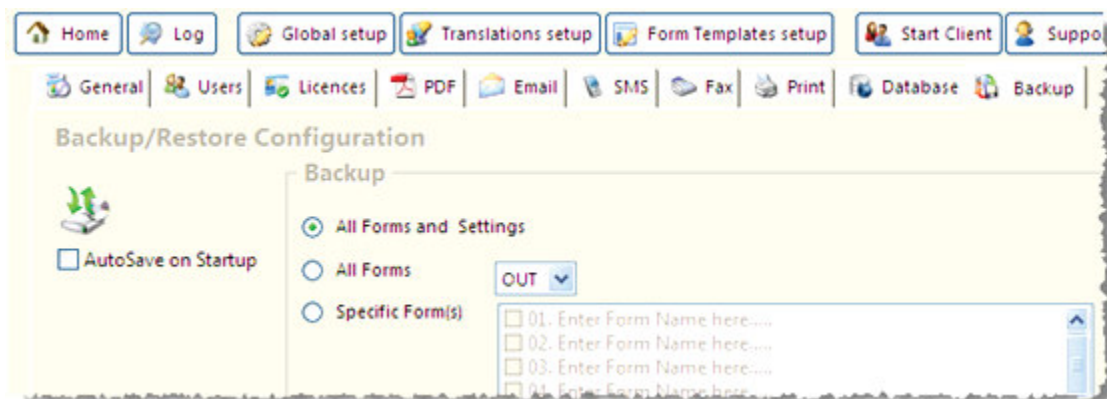
As with any backup procedure, best practice is to avoid storing important files in the same location as those you are backing up. By default, AutoDoc HSE stores files in one of its program directories, for easy access, but we recommend that important configuration files should also be stored separately. Also, note that uninstalling AutoDoc HSE will delete backup files within AutoDoc HSE's program folders.

The following table provides detail for each of the controls in the Backup tab:

Control Name	Control Description
AutoSave on Startup	Use this checkbox to instruct AutoDoc HSE to perform a full backup – all forms and settings – whenever the AutoDoc HSE console is opened. AutoDoc HSE will prompt for the backup location upon starting.
Backup	When performing a backup, use this option button group to specify which backup method should be used. The individual option buttons have the following effects: ▪ *All Forms and Settings*: backs up the configuration of all forms, as well as the global setup items (as displayed in the global setup view). ▪ *All Forms*: backs up the configuration of all forms (but not the global setup items).

▪ *Specific Form(s)*: backs up the configuration of selected forms (but not the global setup items).

See page 233 for specific details on what information is included in backups.

Specific Form(s)	Use this checklist to select the forms to be backed up. This checklist is only available when the *Specific Form(s)* option button is selected.
Backup Selected Settings	Use this button to begin the backup specified in the *Backup* option button group. A file dialogue allows you to select a location for the backup, and to specify a filename. Backups created under different options have different filenames:

▪ *All Forms and Settings*: includes the text `Full Backup` in the filename.

▪ *All Forms*: includes the text `All Forms` in the filename.

▪ *Specific Form(s)*: includes the numbers of the selected forms in the filename.

Restore previously saved settings	Use this button to restore configuration settings from a backup file. You will be prompted to select a file location and file name, and prompted to confirm the overwriting of the current settings.

Backup files have a *.BCK file extension.

With regard to the current configuration (i.e. the configuration prior to restoring), only the information included in the backup file will overwrite the current configuration. For example, if you restore from an `All Forms` backup, the global configuration will remain unchanged. Similarly, if you restore from a `Forms 3-5` backup, only forms 3-5 will be affected by the restore.

Form configuration

The following sections describe the areas of the AutoDoc HSE application which are concerned with specific forms within the AutoDoc HSE system, and are typically found within the application by clicking the *Translations setup* button or the *Form Templates setup* button.

Lite: 5
Standard: 20
Server: 20
Enterprise: 99

Depending on the version of AutoDoc HSE purchased, a different number of forms is available.

Translations setup

The Translations setup view is accessed via the button of that name in the application toolbar (see Figure 12), and is used to specify any translations to be applied to specific text strings of a specified colour or region. For information on the function of translations, see page 38.

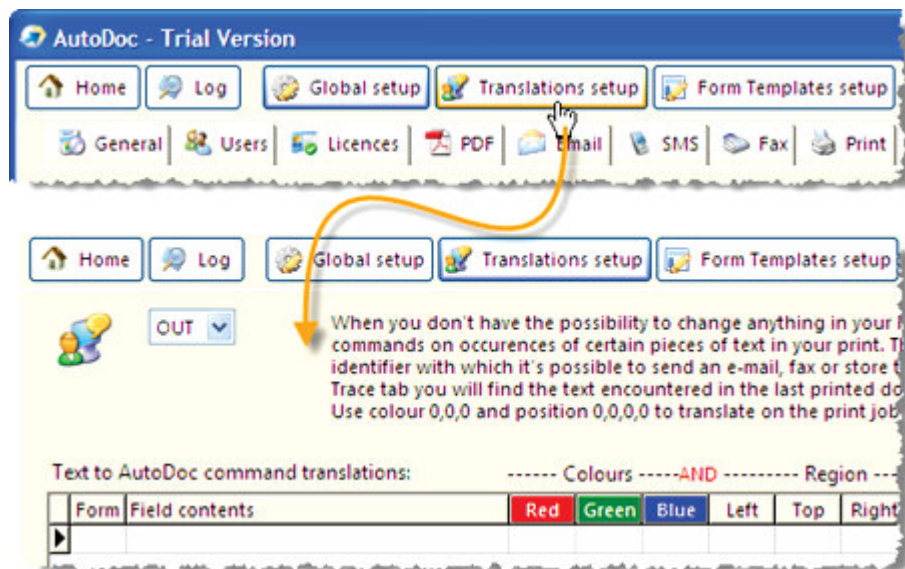FIGURE 12 - accessing the translations view via the *Translations setup* button.

'Wildcards' can be used in the *Text to AutoDoc HSE command translations* table. The character that denotes a wildcard is '?'. Note though, that while the '?' character acts as a wildcard in the *Field contents* column of the table, it also behaves as a storage variable for the purpose of the *Translates to AutoDoc HSE command* column.

For example, suppose a Microsoft Word template is used to create cover letters for new employee induction material. This template has the following sentence with mail-merge controls:

'Please refer to the attached document for detailed OH&S procedures for the {departmentshortname} department.'

The {departmentshortname} mail merge control refers to a database control of a fixed length of four characters, and this text is populated through a Microsoft Word mail merge, to allow the same template to be used as a cover letter for multiple departments. The template text:

'procedures for the {departmentshortname} department'…is set to RGB 21,21,21.

Now suppose that AutoDoc HSE's Translations tab *Field contents* control has the value:

```
procedures for the ???? department
```

…with an RGB setting of 21,21,21.

If a user produces a cover letter using the Microsoft Word mail merge template, and the department for which a specific report is produced is the Research and Development department (short name = 'RDEV'), that flyer would contain the text: 'Please refer to the attached document for detailed OH&S procedures for the RDEV department.'

If the letter is then printed to AutoDoc HSE, the section of the text that corresponds to the defined *Field contents* translation will be recognised: 'procedures for the RDEV department'.

So, if the *Translates to AutoDoc HSE command* control has the value:

```
c:\procedures\OHS\???????? OHS Procedure.pdf
```

	Form	Field contents	Red	Green	Blue		Translates to Command
*	1	procedures for the ???? department	21	21	21		c:\procedures\OHS\???????? OHS Procedure.pdf

…this would result in AutoDoc HSE populating the wildcard part of the file path with the non-blank wildcard values of the recognised string, so that the file `c:\procedures\OHS\RDEV OHS Procedure.pdf` is attached to the outgoing e-mail.

Such a configuration would allow AutoDoc HSE to 'recognise' the employee's department and attach the relevant procedure (provided the procedure is named according to the filename format specified in the *Translates to AutoDoc HSE command* control).

Note that translations can be form specific, or apply to all forms.

Translations also allow plain text to be treated as variables, by converting RGB or region values to different RGB values. For example, form 5 could be configured so an unknown (wildcard) string could be intercepted by region, and treated as a variable with RGB values 2,2,2:

Form	Field	Red	Green	Blue	Left	Top	Right	Bottom	TranslatesTo	Red	Green	Blue
5	?????	0	0	0	108	151	285	165	?????	2	2	2

Please see the following control definitions for the translations table for more information on wildcards.

If you intend to use regions for translations, please see the section on the "Colours / words" tab of the log view, starting on page 174, for valuable information on simplifying the configuration process.

A maximum of 999 translations can be defined.

The following table provides detail for each of the controls in the Translations tab:

Control Name	Control Description
Paste Text / Colour / Region	Use this button to paste information that has been copied from the Colours/words tab of the log view (see page 174 for more information).
Form	Use this text control to specify the form to which this translation applies. To achieve a global translation which will occur for all forms, leave this control blank.
Field contents	Use this text control to define one half of an AutoDoc HSE text to textual command translation. This text control defines the text string for which AutoDoc HSE will look for an exact match, in combination with the RGB values. A maximum of 128 characters can be entered here. Note that entries here: ▪ are case-sensitive ▪ must represent the *entire* text string of the specified colour (unless wildcards are used) ▪ can include wildcards if the wildcard 'mask' matches the text string in regard to number of characters. For example:

- ABC in *Field contents* will result in 'abc' in a print job being ignored (because of case difference).

- ABC in *Field contents* with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being ignored – an exact match is required (that is, the 'Automotive' part of the text would also need to be included in the *Field contents* for the translation to be recognised, since it also exists in the print job as RGB 21,21,21).

- ABC ?????????? in *Control contents* with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being recognised (same number of wildcards (10) as characters in 'Automotive').

- ABC ???????????????????????????? in *Control contents* with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being ignored – because the wildcard mask requires more characters than are in the document with RGB 21,21,21.

Red	Use this text control to specify the Red component of the RGB setting that AutoDoc HSE will use to identify translations. A minimum of 0 and a maximum of 255 (as much red as possible) are allowed.
Green	Use this text control to specify the Green component of the RGB setting that AutoDoc HSE will use to identify translations. A minimum of 0 and a maximum of 255 (as much green as possible) are allowed.
Blue	Use this text control to specify the Blue component of the RGB setting that AutoDoc HSE will use to identify translations. A minimum of 0 and a maximum of 255 (as much blue as possible) are allowed.
Left	Use this text control to enter the leftmost position of the text string specified in the *Field contents* control, measured in pixels from the left edge of the page. This is an optional control, and should only be used if using regions functionality.
Top	Use this text control to enter the topmost position of the text string specified in the *Field contents* control,

		measured in pixels from the top edge of the page.
		This is an optional control, and should only be used if using regions functionality.
Right		Use this text control to enter the rightmost position of the text string specified in the *Field contents* control, measured in pixels from the left edge of the page.
		This is an optional control, and should only be used if using regions functionality.
Bottom		Use this text control to enter the bottommost position of the text string specified in the *Field contents* control, measured in pixels from the top edge of the page.
		This is an optional control, and should only be used if using regions functionality.
Translates to AutoDoc HSE command		Use this text control to define one half of an AutoDoc HSE text to textual command translation. This text control defines the command to which AutoDoc HSE will convert the specified text string (as specified in the *Field contents* control), in combination with the RGB (and/or region) values. A maximum of 128 characters can be entered here.

Note that entries here:

- can be an e-mail address, fax number, end of page command (see page 159), language abbreviation (see page 110), file path/name of a file to be attached (see page 32), or a filename of an overlay file to be included in PDF output (see page 132).

- are not case-sensitive, except for the two-character language commands, which must be capitalised (for example, EN for English or FR for French). See page 110 for more information on language selection.

- can include superfluous wildcards.

For example:

- ABC ?????????? in *Field contents* with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being recognised (same number of wildcards as characters in 'Automotive'). If a filename in the *Translates to AutoDoc HSE command* control is entered as

`c:\clients\ABC ?????????????.doc`, AutoDoc HSE will look for `c:\clients\ABC Automotive.doc`, **not** `c:\clients\ABC Automotive .doc` (that is, the empty wildcards are ignored).

- `A?C?E` in *Field contents* and an e-mail address `hello??@host.com` in the *Translates to AutoDoc HSE command* control, would result in the print job text "ABCDE" (of the specified RGB setting) causing AutoDoc HSE to send an e-mail to 'helloBD@host.com'.

Note that region settings of 0,0,0,0 are considered to mean that a region has not been supplied. In this case, AutoDoc HSE will **only** evaluate colour requirements of the translation. If a region is supplied, AutoDoc HSE will look for text which matches both the region **and** colour requirements.

With regard to translations for extra file attachments, please note the important information about file paths on page 51.

+	Use this button to insert a new row into the translations table.
-	Use this button to delete a row from the translations table.

The form setup 'header'

The form setup view includes controls which always remain visible within this view. These controls (highlighted in Figure 13 below) are collectively referred to as the 'form setup header':
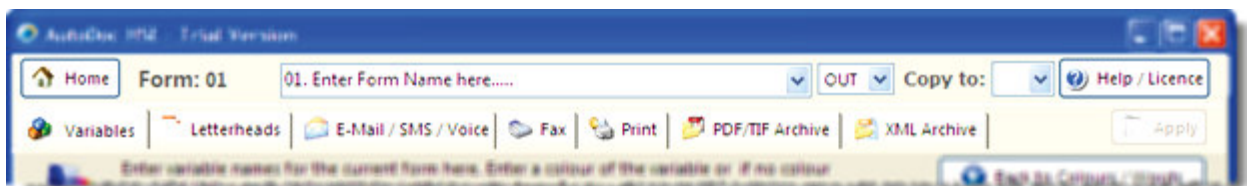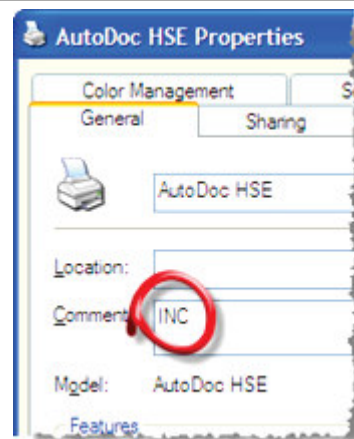

FIGURE 13 - showing the group of controls collectively known as the form setup header.

> Be aware that the name you give to a form will also be used as the filename of any e-mail attachments produced by that form, unless you specify a different name in the *Display name* control (in the form setup E-mail / SMS / Voice tab).

The following table provides detail for each of the controls in the form setup header:

Control Name	Control Description
Home	Use this button to move from the form setup area back to the home page.
Form:	This control consists of two components: 1. a dynamic text label 2. a drop down list The text label displays the number of the form currently selected. In the areas of the form setup view which include language-specific sub-settings, the current language is also displayed here. The drop down list is used to move from one form to another, and also to assign a meaningful name to the selected form. The move from one form to another can be made by dropping down the list of forms and choosing a form, or clicking in the control and using keyboard 'up' and 'down' keys, or a mouse scroll wheel. Typing text into the drop down list edits the name of the form. Be aware that the name you give to a form will also be used as the filename of any e-mail attachments produced by that form, unless you specify a different name in the *Display name* control of the E-mail / SMS / Voice tab.
IN / OUT	The *IN* setting provides an additional set of forms, which can be used by adding the text INC to the AutoDoc HSE virtual printer description.

The default setting is *OUT*.

Copy to:	This drop down list is used to specify a form to which the current form's configuration will be copied. Note that copying between forms results in data from **all** tabs for the current form being copied to the destination form, not just the data from the current tab. Confirmation is requested before the form is copied.
Help/Licence	Use this button to move to the Help/Licence area (see page 177).
Tab strip	These tabs separate the form setup area into different control groups based on their function. Each of the tabs in this group has its own heading in this section of the manual (for example, the Variables tab is described in detail under the "Variables" heading on page 96).
Apply	Use this button to apply the changes made to all areas within the AutoDoc HSE console. Note that this button is only available if an unapplied change has been made to the displayed data. Some changes will also be applied automatically if you move to another area of the application (for example, changes are applied automatically if you move between form #1 and form #2).

Variables

The Variables tab is part of the form setup view, and includes sub-tabs:

- Variables

- Barcodes

- OCR

- Reverse lookup query

The following table provides detail for each of the controls that apply to both the Variables and Reverse lookup query sub-tabs:

Control Name	Control Description
Back to Colours / Words	Use this button to move quickly to the Colours/Words tab of the log (to enable you to quickly copy information from the log to set up translations - see page 174 for more information).
Paste Colour/Region	Use this button to paste information that has been copied from the Colours/words tab of the log view (see page 174 for more information).
PCL5c handling of variables	Use this drop down list to specify the treatment that should be applied to commands and variables for DOS/Unix/Linux/AS400 printing (this setting can be ignored for Windows users).

✖ Lite
✔ Standard
✔ Server
✔ Enterprise

Variables

The variables sub-tab is used to define the RGB values, or regions, that AutoDoc HSE will look for to identify user-defined variables. Different numbers of variables are available in different versions of AutoDoc HSE.

As well as the user-definable names available for variables, variables also have a 'global name' which can be used instead of the name specified in the *Field name* control. This global name is simply the number of the variable. For example, the first variable is known as %Variable 1% by default, but is also known to AutoDoc HSE simply as %1%. Even if you rename variable 1 to %doctype%, AutoDoc HSE will still recognise this variable as %1%, as well as %doctype%. Note also that the global name %1% applies to all forms – while variable 1 may be %doctype% in form 1, and %salesrep% in form 2, in both forms variable 1 is still known as %1%. However, be aware that the global variable names refer to the position of a variable in the Variables grid. If you are using XML attachments, AutoDoc HSE may physically re-arrange the variables within the grid to ensure those variables marked as XML header items occur first in the grid – in which case their global variable numbers will change.

The user-defined variables can also be manipulated for delivery output so that only a part of the variable is used. This is achieved via a 'trimming' function, which alters how much of a variable's content is used when the variable is output. For information on actually limiting variable *input* (that is restricting the range of

correctly RGB-encoded text that populates the variable), see the section starting on page 198.

The trim function has the following syntax:

%<global name>%(<from position>,<to position>)

…where 'from position' and 'to position' refer to the numeric position of characters within the variable string, counting from the left.

For example, if variable 1 is defined as having RGB settings 1,1,1, and the print job includes the text '123456' with RGB settings 1,1,1, if the applicable form's e-mail subject heading was defined as:

```
Information  for  account  holders  with  account  numbers  above
%1%(1,3)000.
```

…the subject would be constructed as:

```
Information  for  account  holders  with  account  numbers  above
123000.
```

Similarly, using `%1%(2,4)` would return '234'.

If you intend to use regions for variables, instead of colour, please see the section on the "Colours / words" tab of the log view, starting on page 174, for valuable information on simplifying the configuration process.

Wildcards can also be used in user-defined variables, to capture a certain part of a mixed static/dynamic text string. For example, the following variable definition for `%invoiceno%` would isolate the invoice number from an appropriately configured invoice, and populate `%invoiceno%` with 317:

Field name	Red	Green	Blue	Left	Top	Right	Bottom	Attach	Header	Default value
invoiceno	1	1	1	0	0	0	0			Invoice No: ??????

invoice

Invoice Date: 1/03/2012
Invoice Due Date: 14/03/2012
Invoice No: 317

Note that in this example, the whole of the highlighted text string is in RGB 1,1,1. That is, both the static component ("Invoice No:") and the dynamic component (the actual invoice number) are both RGB encoded. Specifying both components in the *Default value* control of the variable definition grid ensures that just the dynamic part is isolated with the wildcards. Another option would be to only encode the invoice number with RGB values, leaving the "Invoice No:" text as plain black text. In this way, the invoice number could be captured with just the wildcards:

Default value
??????

While AutoDoc HSE allows for many combinations of RGB values for variables, we recommend that any output that may eventually be printed to hard copy should only include RGB values of equal value. So, for example, rather than defining variable 1 as RGB 1,2,3, defining it as 1,1,1 will ensure a better print quality.

The following table provides detail for each of the controls in the Variables tab:

Control Name	Control Description
Field name	Use this column to specify the names by which the user-defined variables will be known, for the particular form you are currently defining.
	By default, variable names are 'Variable 1' through to 'Variable 20' (or whatever is the highest variable for your version of AutoDoc HSE), which means they can be used in other areas of AutoDoc HSE as `%variable 1%` through to `%variable 20%`, but the variables can

	be renamed to suit your needs.
	A variable cannot be given the same name as a pre-defined system variable, such as %username%.
	See the section starting on page 198 for more information on more strongly-typing variables.
Red	Use this column to specify the Red component of the RGB setting that AutoDoc HSE will use to identify the user-defined variables, for this particular form number.
	A minimum of 0 (no red) and a maximum of 255 (as much red as possible) are allowed.
Green	Use this column to specify the Green component of the RGB setting that AutoDoc HSE will use to identify the user-defined variables, for this particular form number.
	A minimum of 0 (no green) and a maximum of 255 (as much green as possible) are allowed.
Blue	Use this column to specify the Blue component of the RGB setting that AutoDoc HSE will use to identify the user-defined variables, for this particular form number.
	A minimum of 0 (no blue) and a maximum of 255 (as much blue as possible) are allowed.
Left	Use this text control to enter the leftmost position of the text string which will populate the variable, measured in pixels from the left edge of the page.
	Note that an entry here has no effect unless the values for the *Red, Green*, and *Blue* controls are all 0.
Top	Use this text control to enter the topmost position of the text string which will populate the variable, measured in pixels from the top edge of the page.
	Note that an entry here has no effect unless the values for the *Red, Green*, and *Blue* controls are all 0.
Right	Use this text control to enter the rightmost position of the text string which will populate the variable, measured in pixels from the left edge of the page.
	Note that an entry here has no effect unless the values for the *Red, Green*, and *Blue* controls are all 0.
Bottom	Use this text control to enter the bottommost position of the text string which will populate the variable,

measured in pixels from the top edge of the page.

Note that an entry here has no effect unless the values for the *Red, Green*, and *Blue* controls are all 0.

✖ Lite ✖ Standard ✓ Server ✓ Enterprise	*Attach*

This column of checkboxes can be used to create various file types which have contents based on variables. For example, you could create an XML or text file based on variables, formatted according to the header/detail rules specified in the *Header* column (see page 198 for an explanation of this advanced functionality).

By checking a checkbox in this column, you are instructing AutoDoc HSE to include the associated variable as file content in any of the XML-type e-mail attachment file types specified in the E-mail / SMS / Voice tab. Note that this checkbox is also used by the 'mail merge' functionality if an external template file is specified (see page 213 for an explanation of this advanced functionality).

If a variable has a cleared *Attach* checkbox, that variable is ignored for creating XML-type files.

See page 111 for more details on file attachments.

✖ Lite ✖ Standard ✓ Server ✓ Enterprise	*Header*

Use this column of checkboxes to specify which variables are header items in file output. Any variable for which the *Attach* checkbox is checked, will be treated as a header item if the *Header* checkbox is checked, and a detail item if the *Header* checkbox is cleared.

This checkbox is used when utilising XML-type file attachments (see page 198) or 'mail merge' functionality (see page 213).

Default value

Use this column of text controls to specify a default value which will populate the associated variable if the variable is not populated by another means (i.e. by region, RGB, or a reverse lookup).

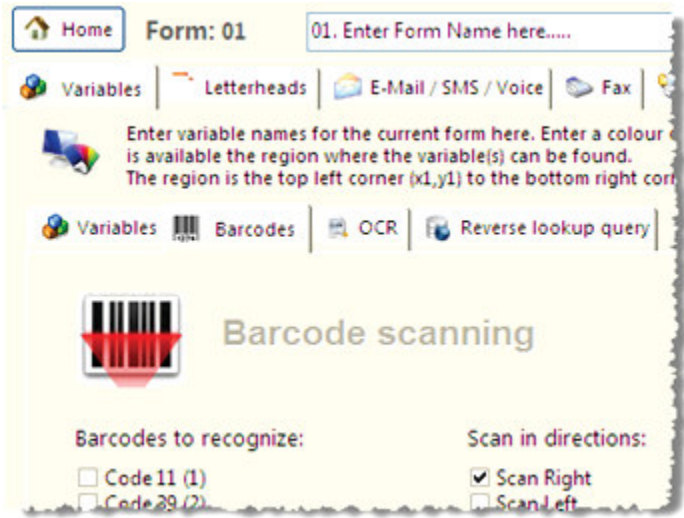This control can include wildcards. See page 98 for more details on using wildcards in variables.

Barcodes

The Barcodes tab facilitates the configuration of AutoDoc HSE's barcode scanning functionality. See page 225 for more information on using AutoDoc HSE to read barcodes.

The following table provides detail for each of the controls in the Barcodes tab:

Control Name	Control Description
Barcodes to recognize	Use this group of checkboxes to specify the barcode types that AutoDoc HSE should recognise.
	The integer in parenthesis as a suffix to the barcode type label (e.g. 9 in the label `EAN13(9)`) provides the 'blue' value of a set RGB specification by which the barcode value can be referenced for variables and translations (see the section beginning on page 225 for more information).
Scan in directions	Use this group of checkboxes to specify the directions in which AutoDoc HSE should attempt to recognise barcode data. The default is to only scan from left to right (*Scan Right*).
Scan interval (pixels)	Use this control to adjust the number of pixels AutoDoc HSE will use as the barcode interval.
Take out pages with barcodes	Use this control to specify that any page with a recognised barcode will be excluded from the scan output.

OCR

The OCR tab facilitates the configuration of AutoDoc HSE's Optical Character Recognition scanning functionality. See page 227 for more information on using AutoDoc HSE's OCR function.

The following table provides detail for each of the controls in the OCR tab:

Control Name	Control Description
Use OCR on this form	Use this checkbox to specify that AutoDoc HSE should perform OCR on the pages processed by the current form. OCR would only be required if processing textual information from a non-textual format (e.g. text in a PDF file which was actually scanned as an image), and that text is to be processed for variables or translations. The default setting is for AutoDoc HSE to not use OCR.
OCR Language	Use this drop down control to specify the language AutoDoc HSE should use as the basis for its attempt to perform character recognition. The default setting is to use whatever language is specified as the language for the computer on which AutoDoc HSE is installed.

OCR Recognise text at % confidence	Use this drop down control to specify the confidence level to apply to the OCR process (the lower confidence level, the more likely text is to be recognised, but also the more likely text will be recognised inaccurately).
Default Paper size	Use this drop down control to specify the default paper size used by the OCR engine.
DPI	Use this drop down control to specify the resolution at which the OCR scan will be performed, in dots per inch.
Auto Rotate Pages	Use this checkbox to specify that AutoDoc HSE should attempt to detect the page orientation of the job being scanned, and to rotate it as appropriate to enable OCR.

Reverse lookup

The Reverse lookup tab is used to define (and test) the SQL SELECT query that will be used by AutoDoc HSE to retrieve data which can then be used to populate AutoDoc HSE variables.

All controls on this tab are optional and would only be required if the reverse lookup functionality is required (see page 206 for more information on reverse lookup functionality).
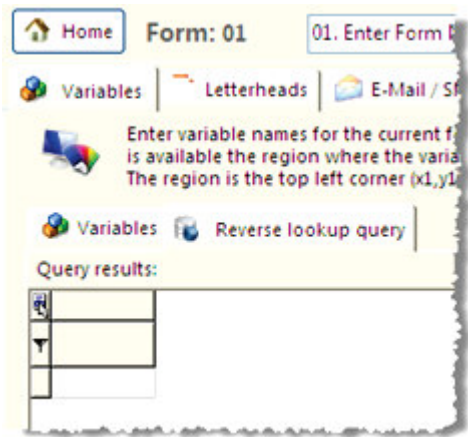
The following table provides detail for each of the controls in the Variables tab:

Control Name	Control Description
Query results	This grid displays the results of an executed SQL query, for testing purposes.
Execute	Use this button to execute the query in the *Reverse variables lookup query SQL statement* field, against the database specified in the Database tab of the Global setup area. The results are displayed in the *Query results* grid.
Reverse variables lookup query SQL statement	Use this text field to specify the SQL SELECT query that AutoDoc HSE will execute against the external database specified in the Database tab of the Global setup area.

Letterheads

The Letterheads tab is part of the form setup view, and allows AutoDoc HSE to emulate pre-printed stationery. Just as your organisation may use pre-printed stationery with a company logo and letterhead, you can achieve the same effect with AutoDoc HSE-processed documents.
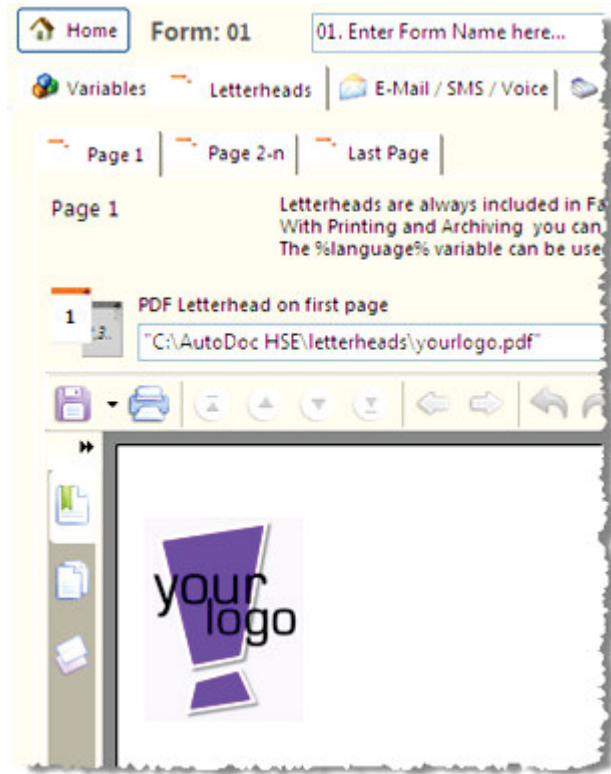
If you have a standard letterhead you would like to apply, you can:

- create a blank page PDF file which features only the letterhead logo on transparent background, or

- scan a blank page, featuring this letterhead, to PDF, and use letterheads in the background rather than the foreground.

…and use that file as AutoDoc HSE's pre-printed letterhead. AutoDoc HSE requires a *.PDF file format for letterheads.

The position of letterheads (background or foreground) is determined by the *PDF Letterhead in* control group, located in the global setup PDF tab.

Note that the specified letterhead will be applied automatically to any e-mail and fax deliveries, and optionally to PDF archive and printed deliveries processed with a form for which a letterhead has been specified (these options are specified

in the PDF Archive and Print tabs respectively). You need to allow blank space for the letterhead in any documents which you send to an AutoDoc HSE form/delivery method which has a letterhead specified.

AutoDoc HSE allows you to specify whether the letterhead should be applied to the first page only, subsequent pages only, last page only, or all pages. You can also opt for different letterheads for first, subsequent, and last pages.

Note that the PDF you select should have the content positioned where you want it to appear in printed pages.

AutoDoc HSE also caters for another form of letterhead, referred to as 'overlays'. Overlays are configured separately to letterheads, and can be configured on a page-by-page basis. See page 132 for more information on overlays.

The Letterheads tab has three sub-tabs. The controls in each of these tabs are identical, only the functions of the three tabs themselves differ:

- Page 1: specifies the letterhead to be applied to the first page of document output, for this particular form. Note that if only one page is produced in document output, and the Last Page tab has a letterhead specified, the single page output will feature the Last Page letterhead rather than the Page 1 letterhead.

- Page 2-n: specifies the letterhead to be applied to all pages, from the second page onwards, of document output, for this particular form. Note that the letterhead specified in this tab will also be applied to the last page, unless an entry is made in the Last Page tab.

- Last Page: specifies the letterhead to be applied to the last page of document output, for this particular form. This tab would only be completed if the letterhead for the last page should differ from that specified in the Page 2-n tab. Note that if only one page is produced in document output, and the Last Page tab has a letterhead specified, the single page output will feature the Last Page letterhead rather than the Page 1 letterhead.

Note that letterheads can potentially be configured on a per-tray basis, using the %tray% variable. While tray paper size settings can be adjusted by the AutoDoc HSE administrator in the *Device Settings* tab of the AutoDoc HSE printer, using the %tray% variable in the file path of letterheads within AutoDoc HSE allows different letterheads to be specified per tray, as well as per form.

The possible values for %tray% are all numeric, and indicate the following settings:

- 0 to designate 'automatic'
- 2 to designate front tray
- 3 to designate rear tray
- 4 to designate manual feed
- 5 through 20 to designate trays 5 through 20

For example, to configure different letterheads for different trays, the letterhead file path could be configured as follows:
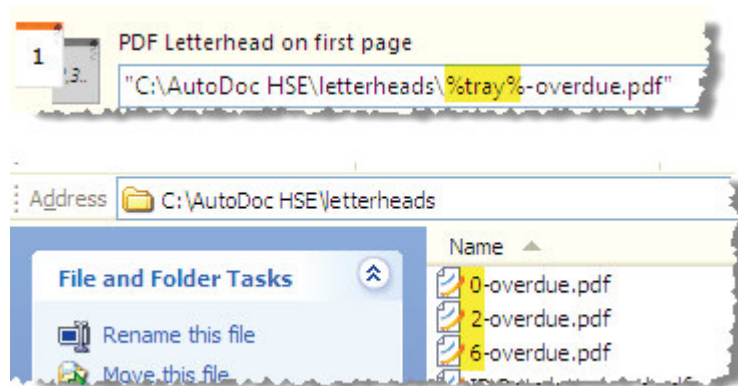
The following table provides detail for each of the controls in the Letterheads tab:

Control Name	Control Description
PDF Letterhead...	Use this text control to enter the file path and filename of the PDF letterhead to include for the particular page group (first/subsequent/last) for this particular form. You can either enter text directly into the field (in which case the file path and name should be enclosed in quotation marks), or use the browse button to the right of the control to locate the file. Note the important information regarding file locations on page 50. A valid selection is displayed in the preview pane at the bottom of the view. This preview pane is an embedded PDF viewer.
Rotate:	Use these 3 buttons to rotate the letterhead. The first button rotates the letterhead 90° counter-clockwise, the second button rotates the letterhead 180°, and the third button rotates the letterhead 90° clockwise.

E-Mail

The E-mail / SMS / Voice tab is part of the form setup view, and is used to define an e-mail 'template' to be applied to e-mailed deliveries processed under the form in question.

AutoDoc HSE-processed pages which include an e-mail address in text of the colour specified as designating textual commands (or text that is translated to an e-mail address), are converted into the specified file format(s) and attached to an e-mail which is sent to that address.

> Note that e-mail attachments created from source documents are named with the name of the form which processed the print job, unless an alternative name is specified in the *Display name* control (which is also on this tab).

The AutoDoc HSE E-mail / SMS / Voice tab is very similar in appearance to the layout of new e-mails created under various e-mail clients, and performs a similar role, but AutoDoc HSE controls *store* the information that you normally would manually enter for each new e-mail. With the settings stored, AutoDoc HSE achieves a seamless, automated delivery of the e-mail with no further user input required.

For example, you can specify who will receive CC e-mails in addition to the main recipient, and the text (and, optionally, HTML content – see the field definitions below for more information) that will be seen in the body of the e-mail.

The E-mail / SMS / Voice tab also includes the following functionality:

- Language 'sub-forms'

- XML-type file attachments based on print job variable content

- Extra file attachments

- SMS messaging

- Text to speech (TTS) output as an mp3 file

- Digital signatures

Language 'sub-forms'

✖ Lite
✖ Standard
✓ Server
✓ Enterprise

Each form has the option of making a separate 'sub-form' for each 'major' European language. For example, if you have English-speaking customers, and German-speaking customers, you could configure form 1 for invoices, and set up both the English and German tabs of form 1 so that they contain an appropriate message in the applicable language. Figure 14 depicts this example. An invoice report which is sent to an AutoDoc HSE printer would then be assessed for language commands. If no command is specified, the default language is used. The default language is specified on the General tab in the global setup area. The default language takes the leftmost position in the language tab sub-forms.
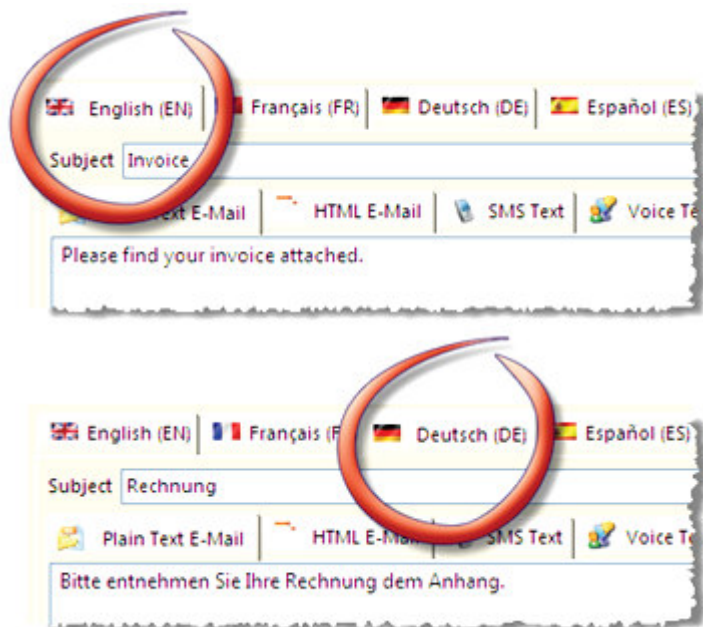
FIGURE 14 - depicting the use of language tabs to create 'sub-forms' within a form. The same subject and message is added to both tabs, in the corresponding language.

A language command can be specified in a document by adding the two-letter abbreviation (which appears on the tab next to the full language name) in the

colour specified for AutoDoc HSE commands. Using the above example, adding the text:

```
DE
```

...to a page in command colour, would result in that page being processed under the German sub-form.

AutoDoc HSE does not actually perform any language translation; it simply provides an area to record the same configuration, but using different languages (that is, the user creating the configuration performs the translation as part of the configuration). Because no actual translation is taking place during processing, should you need to deliver documents in a language not currently catered for in AutoDoc HSE, you could simply use one of the language tabs you do not use. For example, the Russian tab could be used to configure deliveries in Chinese.

It is of course possible to use the AutoDoc HSE sub-forms for a purpose other than language support. For example, form 1 could be used for invoices, and the English tab could be configured as per the example in Figure 14, while a different language tab could be used to resend invoices which have not been paid on time, with a reminder message in the body of the e-mail.

Note that the Fax tab (detailed from page 125) also includes language sub-forms.

XML-type file attachments

The Variables tab allows for each of the user-defined variables to be configured as content to be included in an e-mail file attachment. This could potentially allow for, for example, an invoice report to produce an XML file which has an invoice header and detail lines based on user-defined variables (that is, based on the content of the 'paper' invoice). The file output attachment formats are specified in this tab via the *Include attachments* buttons. See page 114 for more detail on the attachment types available in your version of AutoDoc HSE, and see page 198 for more information on configuring variables for use with XML attachments.
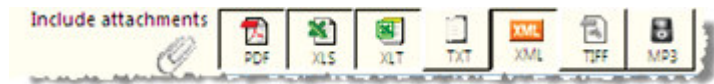
Extra file attachments

Each form can be configured to include extra files in the e-mailed output, which may be completely unrelated to the print job which AutoDoc HSE is processing. For example, you may wish to include a list of current specials to the e-mails which deliver invoices.

If using this functionality, please note the important information about file paths on page 51.

SMS messaging

SMS messages can be delivered to a recipient's phone number, as specified in an SMS textual command (`<RecipientPhoneNumber>@SMS`). This tab includes a control in which an SMS message can be preconfigured for such deliveries.

Digital signatures

AutoDoc HSE can interact with third-party hardware to digitally sign PDF attachments. Prior to sending e-mails, AutoDoc HSE can direct attachments to a third party 'inbox' (as specified in the *Input* control on the global setup PDF tab). Signing hardware can then sign the file(s) and return them to its 'outbox' (as specified in the *Output* control on the global setup PDF tab). Once AutoDoc HSE finds a file in the outbox with the same name as the file it placed in the inbox, the signed file is attached to the e-mail and sent as usual.
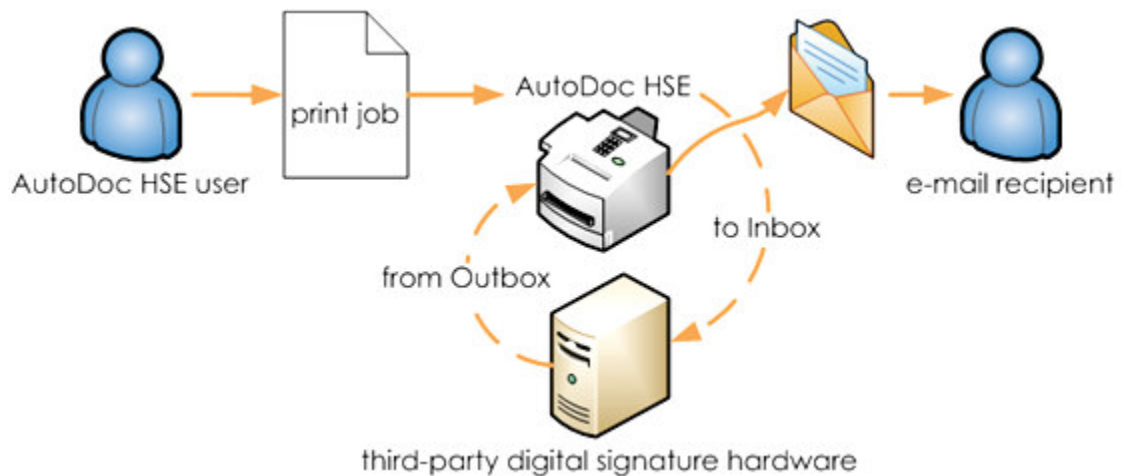
FIGURE 15 - *the digital signature process.*

For e-mails that need to be signed, the AutoDoc HSE e-mail command is slightly modified: such commands must include a "SIG" prefix. For example, this e-mail textual command:

```
info@abcautos.com
```

...would send a standard, unsigned e-mail, while this e-mail textual command:

```
$SIG$info@abcautos.com
```

...would result in AutoDoc HSE passing the PDF attachment to third-party signature hardware for signing, as depicted in Figure 15. The "SIG" prefix is removed by AutoDoc HSE prior to sending the e-mail.

Digital signatures can also be used in conjunction with SSL. See the control definition for the *Enable SSL* checkbox on page 70 for more detail on combining SSL command prefixes with SIG prefixes.

Please contact Streamline Software for more information on using digital signatures.

The following table provides detail for each of the controls in the E-mail / SMS / Voice tab:

Control Name	Control Description
(Extra) To	Use this drop-down list to specify an AutoDoc HSE user to whom the e-mail will be sent. In addition to all users created in the Users tab, the following possible pre-set *To* entries exist in the drop-down list: ▪ NO CC – this is the default entry, and specifies that a CC e-mail will not be created. ▪ ASK TO – the user will be prompted to specify a recipient 'on the fly' – applies to MAPI e-mail only (as specified in the Global setup area) ▪ CREATOR/OWNER – specifies that a CC e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail. ▪ DEFAULT USER – specifies that a CC e-mail will be sent to the e-mail address of the Default User (as specified in the Users page). Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons. Variables can also be used in e-mail addresses.
CC	Use this drop-down list to specify an AutoDoc HSE user to whom a CC (Carbon Copy) e-mail will be sent. In addition to all users created in the Users tab, the following possible pre-set CC entries exist in the drop-down list: ▪ NO CC – this is the default entry, and specifies that a CC e-mail will not be created. ▪ CREATOR/OWNER – specifies that a CC e-mail will be sent to the e-mail address

associated with the user (as specified in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.

- DEFAULT USER – specifies that a CC e-mail will be sent to the e-mail address of the Default User (as specified in the Users page).

Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons. Variables can also be used in e-mail addresses.

BCC to User	Use this drop-down list to specify an AutoDoc HSE user to whom a BCC (Blind Carbon Copy) e-mail will be sent. Blind Carbon Copy e-mails appear to the BCC recipient as a normal e-mail, but in the e-mails received by the other addressees, the BCC recipient's name is not listed as a recipient (hence the term 'blind' – only the BCC recipient and the sender can see that the BCC recipient received a copy of the e-mail). In addition to all users created in the Users tab, the following possible BCC entries exist in the drop-down list: ▪ NO BCC – this is the default entry, and specifies that a BCC e-mail will not be created. ▪ CREATOR/OWNER – specifies that a BCC e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail. ▪ DEFAULT USER – specifies that a BCC e-mail will be sent to the e-mail address of the Default User (as specified in the Users page). Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons. Variables can also be used in e-mail addresses.
Include attachments	This button group is used to specify the file format(s)

into which the documents printed to AutoDoc HSE will be converted and included as an e-mail attachment. The default setting is for only PDF attachments to be created.

See page 201 for more information on XML-type file attachments.

Note that some file formats are only allowed in certain versions of AutoDoc HSE.

Multiple file types can be attached to the one e-mail.

Lite: PDF Standard: PDF Server: PDF, XLS, XLT, TXT, MP3 Enterprise: PDF, XLS, XLT, TXT, XML, MP3	

XML template file	Use this text control to specify an external XML template to use as the basis for producing XML file attachments. Refer to page 50 for important information regarding file locations.
Detail separator tag	Use this text control to specify which element in the XML template equates to the <item></item> element in the default AutoDoc HSE structure (i.e. the element that will be repeated to contain the AutoDoc HSE detail level variables).
Send e-mail using user profile	Use this drop-down list to specify which AutoDoc HSE user profile should be used to send the e-mail. The user profile determines what name and e-mail address is used to represent the sender of the e-mail. For example, if the DEFAULT USER profile is used to send e-mails, when the recipient receives the e-mail, the sender will be listed as the full name associated with the Default User (as specified in the Users tab). The user profile also determines what information is used to populate any of the user-based system variables which you elect to use in the e-mail. For example, if your e-mail subject includes the variable %department%, AutoDoc HSE will check this control to find which user's department information (as specified in the Users tab) should be used. In addition to all users created in the Users tab, the following possible *Send e-mail using user profile* entries exist in the drop-down list: ▪ CREATOR/OWNER – specifies that the profile (as defined in the Users tab) for the user who sent the print job to AutoDoc HSE will be used to send e-mails. This is the default setting.

Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.

- DEFAULT USER – specifies that the profile of the Default User (as specified in the Users page) will be used to send e-mails.

E-Mail Address overrule	This drop-down list is usually used for testing purposes only.

If an overrule is defined, the e-mail will not be sent to the e-mail address(es) specified in the source document, but rather to the e-mail address of the user specified in this control.

Note that an overrule only applies to the addresses specified in the source document – if a CC or BCC has been specified in the form, these are not affected by an overrule.

In addition to all users created in the Users tab, the following possible *Overrule E-Mail address* entries exist in the drop-down list:

- NO OVERULE – specifies that an overrule will not be applied, and e-mails will be sent to the addresses specified in the document. This is the default setting.

- CREATOR/OWNER – specifies that the recipient address(es) as specified in the document will be overruled by that specified for the user (as defined in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.

- DEFAULT USER – specifies that the recipient address(es) as specified in the document will be overruled by that specified for the Default User (as defined in the Users tab).

Standard e-mail addresses can also be entered in this control. Variables can also be used in e-mail addresses. |
| *E-Mail Program overrule* | Use this drop-down list to specify a form-specific e-mail protocol to be applied. This control provides a means of overriding the default e-mail protocol |

specified in the global setup E-mail tab.

The possible entries include:

- NO OVERRULE – specifies that the default e-mail protocol will be used for this form.

- USE MAPI – specifies that the MAPI protocol will be used for this form, regardless of what has been selected as the default protocol in the global setup E-mail tab.

- USE SMTP – specifies that the SMTP protocol will be used for this form, regardless of what has been selected as the default protocol in the global setup E-mail tab.

PDF/XML Signing	Use this drop down checklist control to specify the options to apply to PDF and XML attachments, with respect to signing, as configured in the *E-mail* tab of the Global setup area.
Send MAPI E-mail immediately	Use this checkbox to specify that e-mails should be delivered immediately. If the checkbox is cleared, e-mails will be left in the Outbox. This checkbox only applies when the MAPI protocol is used to send e-mails, and is disabled when the MAPI protocol is not being used.
Request delivery receipt	Use this checkbox to specify that a delivery receipt should be requested. This checkbox only applies when the MAPI protocol is used to send e-mails.
Request read receipt	Use this checkbox to specify that e-mails should be created with a read receipt request.
Priority	Use this drop-down list to specify a priority to be applied to the e-mail.
Language tabs	Use these tabs to open the 'sub-forms' within the current form. See page 110 for more detail on the language tabs. The tab corresponding to the default language specified in the global setup General tab is the leftmost tab in this control group. The tabs can be scrolled using the left and right scroll buttons to the right of the tab strip.

Subject	Use this text control to enter, optionally, the subject heading that will appear on deliveries created with this form. This control is context-dependent; a different subject can be specified for SMS texts and for e-mails.
	All the AutoDoc HSE variables can be used in this control. For example, you could enter the subject heading as:
	%doctype% for account %accnumber% from %company%.
	…where %doctype% and %accnumber% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc HSE printer could then result in an e-mail with the subject heading 'Tax Invoice for account 34456 from XYZ Electrical Company.'
	For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 33 or, alternatively, press the F1 keyboard function key.
	Note that an e-mail's subject heading has a maximum length of 255 characters.
	An e-mail which has no subject specified will be sent with the name of the form under which it was processed, as the subject heading.
Plain Text E-Mail	Use this text control to specify the message body text for a plain text e-mail.
	Note that AutoDoc HSE will only send a plain text e-mail if the HTML E-mail tab does not have a message file specified (i.e. only if a configured HTML e-mail is not used in preference over a plain text e-mail).
Message file	Use this text control to specify, optionally a file, the contents of which will be used as the e-mail's body.
	You can enter the filename directly into the control (enclosed in inverted commas), or use the browse button to the right of the control.
	The file specified must be a text (TXT) file or an HTML file.
	If using Microsoft Word to create the HTML file which will be used as the e-mail body, we recommend saving the Word document as a 'filtered' web page, which will

prevent extraneous additional files being attached to the outgoing emails, which would otherwise be included if using Word's standard HTML file format. Other applications such as Open Office Writer will produce cleaner HTML code.

Text/HTML	Use this button to switch between the HTML message body source code and the HTML message body preview.
Cancel	This button is only available when viewing the HTML in source code view, and is used to undo any edits made to the HTML file since it was last saved.
Search	This text control is only available when viewing the HTML in source code view, and is used to enter a search string which can be used in conjunction with the < > (previous and next) buttons, to locate text within the source code view.
Save	This button is only available when viewing the HTML in source code view, and is used to save the HTML file. Note that any changes are saved to the HTML file itself – that is, AutoDoc HSE does not keep a separate copy of the specified HTML file.

E-mail body editor	In the case where files are included as extra attachments (see the definition of the *Extra attachments* control on page 123 for more detail on this method), the files can be referred to by a Content ID ("cid" prefix) rather than a file path. For example, rather than referring to an HTML image source as:
	
	`src="C:\Marketing\Art\Logos\Main.jpg"`
	
	...you can refer to the source of an attached image as:
	
	`src="cid:Main.jpg"`
	
	Note that files referred to via Content IDs are case-sensitive. That is, in the example above, an image source of "`cid:main.jpg`" would not work (due to the lowercase 'm'). Note also that the Content ID prefix

itself is also case-sensitive. It must be specified in lowercase (cid), not uppercase (CID).

Text or HTML files specified in this control can include variables. For example, the HTML file could include the following line of code:

```
<p>Please find attached your invoice for
%total%.</p>
```

Note the important information regarding file locations on page 50.

Image filenames referenced by the HTML file can also contain variables.

HTML emails can leverage AutoDoc HSE's reverse lookup/XML/mail merge functionality to populate the HTML file.

SMS Message	Use this control to specify, optionally, an SMS message to be sent when the document being processed under this form includes a valid SMS textual command.
	Variables can be used in this control. For example, the control could include the following text:
	``` A message from %company%: your %formname% has been sent to your registered e-mail address. ```
	...which could result in the following SMS message:
	``` A message from XYZ Electrics: your invoice has been sent to your registered e-mail address. ```
	The label associated with the control indicates how many characters have been used. Note that this indication will not include the final character result of any variables used (since variables, by definition, can vary in length).
	See page 72 for more information on using SMS messaging.
Voice Name	Use this drop-down list to select a voice profile to be used in the voice text MP3 file. See page 211 for more details on using AutoDoc HSE's text-to-voice capabilities.
MP3 Filename	Use this text control to specify the filename of the resultant text-to-speech MP3 file.
	The filename specified here will be used as the

	filename for the e-mail attachment, and can contain variables.
Priority(MP3)	Use this drop-down list to specify a priority for the MP3 file.
Quality (MP3)	Use this drop-down list to specify the file quality of the MP3 file. Note that this will affect the size of the MP3.
Test speech	Use this button to test the settings specified, and convert the text in the message box to speech.
Volume	Use this slider to change the volume of the MP3 file.
Tempo	Use this slider to change the tempo of the MP3 file.
Pitch	Use this slider to change the pitch of the MP3 file.
Voice message	Use this text control to specify the text of voice message that will be created. Variables can be used.
Display name	Use this text control to specify a name that will be used as the filename (excluding file extension) for any e-mail attachments created by AutoDoc HSE for this form.
Title	Use this text control to specify a document title to be included in the PDF document properties, for any PDF e-mail attachments created by AutoDoc HSE for this form.
Subject	Use this text control to specify a document subject to be included in the PDF document properties, for any PDF e-mail attachments created by AutoDoc HSE for this form.
Author	Use this text control to specify an author to be included in the PDF document properties, for any PDF e-mail attachments created by AutoDoc HSE for this form.
Open Password	Use this text control to specify a password to be included in the PDF document properties, for any PDF e-mail attachments created by AutoDoc HSE for this form. A password specified here will prevent the document being opened, unless the person opening the document can supply this password. The open password will only be enforced if an owner

✗ Lite
✗ Standard
✓ Server
✓ Enterprise

	password has also been specified.
Owner Password	This text control is only visible if an owner password has been specified here in an earlier version of AutoDoc HSE. Later versions use the Owner Password specified in the PDF tab within the Global setup area.
	This text control specifies a password to be included in the PDF document properties, for any PDF e-mail attachments created by AutoDoc HSE for this form. A password specified here will create a secured PDF, and prevent the document's properties (including security properties) being edited.
	The password specified here cannot be the same as the password specified as the *Open Password.*
Encryption	Use this drop down list to specify the encryption level for any secured PDF e-mail attachments created by AutoDoc HSE for this form.
Print the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still print the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
Copy text and graphics from the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still copy text and graphics from the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
Add comments to the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still add comments to the file (if using software which supports this function). If the checkbox is cleared, such a user cannot perform this operation with the file.
Change the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still change the file (if using software which supports this function). If the

	checkbox is cleared, such a user cannot perform this operation with the file.
Extra attachments	Use this list control to specify the paths and filenames of any extra files to be attached to e-mails sent via this form.
	The file path and file name can include system variables. For example, if a user with an AutoDoc HSE username of 'PeterM' and company name 'XYZ Electrical' enters a file path as:
	`C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf`
	…this would result in the 'specials.pdf' file, which resides in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being included as an attachment in the e-mail (assuming this file is accessible to AutoDoc HSE).
	Extra attachments can also be included to ensure that HTML e-mails which reference other files, display correctly (since they are included as an attachment, and are no longer relying on AutoDoc HSE being able to access network or internet resources). For example, rather than referencing a logo that resides on an internet resource, you could include that logo as an extra attachment. The attachment can then be referenced in the HTML e-mail by its Content ID (see the definition for the *Message file Text/HTML* control on page 118 for more information on referencing by Content IDs).
	Files can be 'dragged and dropped' into this control. This copies the filename and path to the control, leaving the original file in its original location.
	Note the important information regarding file locations on page 50.
	Note also that files to be included as extra attachments can be referenced by filename only (without path), if those files are placed in the "hseattachments" folder, the default location for which is `C:\AutoDoc HSE\hseattachments`
Attach PDF attachments to the Main PDF	Use this checkbox to specify that any PDF files listed in the *Extra Attachments* control should be appended to the main PDF created under this form. For example, if this checkbox is checked, and an invoice is processed

under this form for PDF e-mail delivery, and a PDF marketing flyer has been specified as an extra attachment, the e-mail will include only one PDF file, the first page (or pages) of which would be the invoice, with the flyer making up the remainder of the PDF document.

Fax

The Fax tab is part of the form setup view, and is used to define a fax 'template' to be applied to faxed deliveries processed under the form in question.

AutoDoc HSE-processed pages which include a fax number (or translation text) in the colour specified as designating textual commands (in the global setup General tab) are converted into TIF format and sent to your nominated fax service.

Note that the Fax tab can work in tandem with an optional fax cover page defined with your fax service. This allows you to specify the exact placement of text and images in a cover page. For example, the *Cover page text* control defines the text that will populate the 'Note' control of a Microsoft Fax cover page. You can therefore use the Microsoft Fax cover page designer to move the 'Note' control to where you would like the text to be placed. Similarly, the AutoDoc HSE Fax tab *Subject* text control populates the Microsoft Fax 'Subject' control and can optionally be placed in a cover page. See Figure 16 for a depiction of the correspondence between AutoDoc HSE fax fields and fax cover page fields.

Note that the letterhead for the first page of a fax (as specified in AutoDoc HSE's Letterheads tab) only applies to the first page of the faxed source document, not to cover pages – if you require a letterhead or logo on the cover page, you can use your fax service's cover page designer to achieve this.
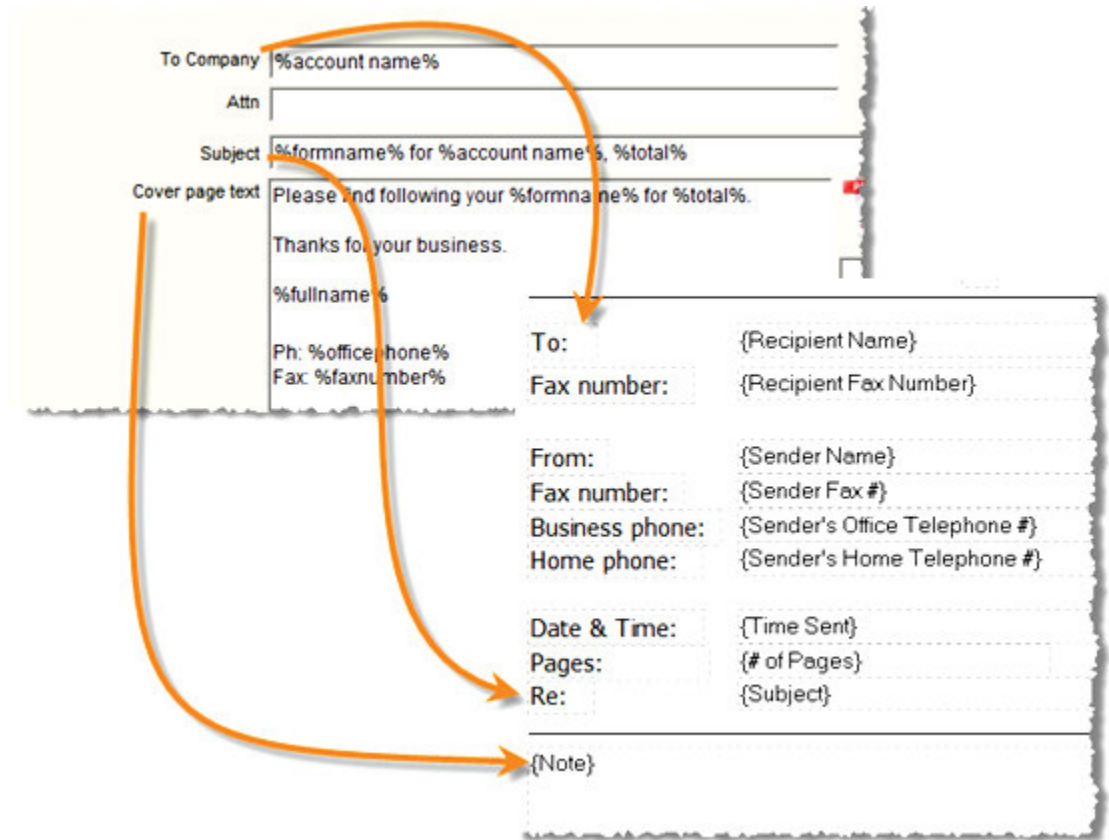
FIGURE 16 – depicting the relationship between AutoDoc HSE Fax fields and those in a Microsoft Fax cover page.

The following table provides detail for each of the controls in the Fax tab:

Control Name	Control Description
(Extra) To (Fax)	Use this drop-down list to specify an additional fax recipient.
	In addition to all users created in the Users tab, who have a fax number recorded, the following possible entries exist in the drop-down list:
	▪ NO TO – specifies that an extra fax will not be sent. This is the default setting.
	▪ CREATOR/OWNER – specifies that an extra fax will be sent to the fax number specified for the user (as defined in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER

for the fax.

Standard fax numbers can also be entered in this control.

Send Fax using user profile	Use this drop-down list to specify which AutoDoc HSE user profile should be used to send the fax.
	The user profile determines what information is used to populate any of the user-based system variables which you elect to use in the fax. For example, if your fax cover page text includes the variable %department%, AutoDoc HSE will check this control to find which user's department information (as specified in the Users tab) should be used.
	In addition to all users created in the Users tab, the following possible *Send fax using User profile* entries exist in the drop-down list:
	▪ CREATOR/OWNER – specifies that the profile (as defined in the Users tab) for the user who sent the print job to AutoDoc HSE will be used to send faxes. This is the default setting. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the fax.
	▪ DEFAULT USER – specifies that the profile of the Default User (as specified in the Users page) will be used to send faxes.
Fax number overrule	This drop-down list is usually used for testing purposes only.
	If an overrule is defined, the fax will not be sent to the fax number(s) specified in the source document, but rather to the fax number of the user specified in this control.
	In addition to all users created in the Users tab, who have a fax number recorded, the following possible entries exist in the drop-down list:
	▪ NO OVERULE – specifies that an overrule will not be applied, and faxes will be sent to the number(s) specified in the document. This is the default setting.
	▪ CREATOR/OWNER – specifies that the recipient fax number(s) as specified in the

document will be overruled by that specified for the user (as defined in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the fax.

- DEFAULT USER – specifies that the recipient fax number(s) as specified in the document will be overruled by that specified for the Default User (as defined in the Users tab). This option is only available if a fax number has been specified for the default user.

Standard fax numbers can also be entered in this control.

Language tabs	Use these tabs to open the 'sub-forms' within the current form. See page 110 for more detail on the language tabs.
Cover Page	This group of option buttons is used to specify the location of the cover page specified in the *Cover page* control.

Cover page name	Use this text control to enter, optionally, the filename of a fax cover page to be used with this form's fax settings.
	
	Note that the cover page name must be entered without the file extension and without the file path. For example, the file:
	
	`C:\Documents and Settings\All Users\Application Data\Microsoft\Windows NT\MSFax\Common Coverpages\Cover Page.cov`
	
	...would be entered:
	
	`Cover Page`

Cover Page Designer	Use this button to launch your fax service's cover page designer, if you wish to design or modify a cover page 'on the fly'.
To Company	Use this control to specify, optionally, the recipient's company name. This control can be used together with a fax cover page – for example, in the case of Microsoft Fax, the AutoDoc HSE *To Company* and *Attn* controls are merged to populate the fax service's 'To' value.

✘ Lite
✘ Standard
✓ Server
✓ Enterprise

All the AutoDoc HSE variables can be used in this control. For example, you could enter the company as:

%accname%

…where %accname% is a user-defined variable (as defined in the Variables tab). Printing an invoice to an AutoDoc HSE printer could then result in a fax with the recipient listed as 'ABC Automotive', as well as the name specified in AutoDoc HSE's *Attn* text control.

Attn	Use this control to specify, optionally, an individual recipient's name. This control can be used together with a fax cover page – for example, in the case of Microsoft Fax, the AutoDoc HSE *To Company* and *Attn* controls are merged to populate the fax service's 'To' value.

All the AutoDoc HSE variables can be used in this control. For example, you could enter the company as '%accname%', and the individual recipient's name as '%acccontact%', where %accname% and %acccontact% are user-defined variables (as defined in the Variables tab). Printing an invoice to an AutoDoc HSE printer could then result in a fax with the recipient listed as 'ABC Automotive Attn. Joan Simpson'.

Subject	Use this text control to specify, optionally, the text that will be used as the fax's subject heading.

All the AutoDoc HSE variables can be used in this control. For example, you could enter the subject as:

%doctype% for account %accnumber% from %company%.

…where %doctype% and %accnumber% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc HSE printer could then result in a fax with the subject heading 'Tax Invoice for account 34456 from XYZ Electrical Company.'

For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 33 or, alternatively, press the F1 keyboard key.

Cover page text	Use this control to enter the main body of text that will appear on the fax's cover page. For example, in the case of Microsoft Fax, the text entered here will

populate the cover page's 'Note' field.

All the AutoDoc HSE variables can be used in this control. For example, you could enter the cover page text as:

Please find following your %doctype% of %docdate%. If you have any queries, please don't hesitate to contact me on %officephone%.

Kind Regards,

%fullname%.

…where %acccontact%, %doctype% and %docdate% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc HSE printer could then result in a fax with the text:

'Please find following your Tax Invoice of 30/04/2005. If you have any queries, please don't hesitate to contact me on 1234 5678.

Kind Regards,

Peter McKenzie.'

For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 33 or, alternatively, press the F1 keyboard key.

Send fax	Use this option button group to specify the time at which the fax should be sent.

The following options are available:

- *Now* – specifies that the fax will be sent to your fax service with a scheduled send time equal to the job's submission time, which results in the fax service treating the job as an immediate send.

- *At:* – specifies that the fax will be sent to your fax service with a scheduled send time as specified in the *hh:mm:* text control.

- *Current time +* – specifies that the fax will be sent to your fax service with a scheduled send time equal to the time processed plus the length of time specified in the *hh:mm:* text control.

- *Discount period* – specifies that the fax will be

	sent to your fax service with a scheduled send time within the discount period specified in your fax service.
hh:mm	Use this text control to enter a time.
	This value can be used in conjunction with two of the option buttons in the *Send fax* control group, to send faxes at a specific time, or a set length of time after they are processed.
	The time must be entered in '24-hour clock' notation, and can be from 00:00 (midnight), to 23:59.
	Note that this entry refers to a time in the 24-hour period subsequent to the creation of the fax. For example, if a fax is created at 17:00, and the form specifies that it should be sent at 16:00, the fax will be scheduled for 16:00 on the next day rather than 16:00 on the day it was created.
Priority	Use this option button group to specify what priority should be assigned to faxes created under this form.
Extra PDF attachments	Use this control to specify the paths and filenames of any extra PDF files to be appended to faxes created via this form.
	The file path and file name can include system variables. For example, if a user with an AutoDoc HSE username of 'PeterM' and company name 'XYZ Electrical' enters a file path as:
	`C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf`
	…this would result in the 'specials.pdf' file, which resides in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being appended to the fax.
	Files can be 'dragged and dropped' into this control. This copies the filename and path to the control, leaving the original file in its original location.
	Note that only PDF files can be appended to faxes using this control. Also note the important information regarding file locations on page 50.

Print

The Print tab is part of the form setup view, and is used to define the hard copies that should be produced under the form in question.

In addition, AutoDoc HSE provides extra functionality to achieve more flexible handling of documents than can usually be achieved from a single printer. For example, documents can be sent to multiple printers, for printing with or without your specified letterhead. The Print tab also facilitates a 'mail merge'-like function where variables can be used to populate external template files.

These functions are separated into sub-tabs, called Multi-Drop Printing, Reduced Printer Output, and Print Extra Documents / Labels.

Note that the availability of printers under these functions is determined by whether the additional AutoDoc HSE user service is running (see page 25 for more information on the user service).

Overlays

Overlays behave in a similar fashion as letterheads, and can be placed on top of the blank document to add document content.

Also, because overlays can be a document-based command (see the command information on page 32) to apply to other delivery forms such as emails, you can potentially specify a different overlay for every page of a document. Also, with command-based overlays, overlays can be 'stacked' on top of one another in a 'transparency' fashion, so that, for example, two overlays specified on one page of a document are merged, together with the source page itself and any letterhead associated with it, into one PDF output page which features all the information from those 4 sources (see Figure 17).

Note that the transparency effect can only be achieved when the PDF files used as overlays have transparency enabled.

In the multi-drop print tab, overlays are treated as being separate, rather than stacked. So, a printer which is configured to print a single copy in the multi-drop print tab, but with two different overlays, will actually produce two copies – one for each of the two overlays, whereas command-based overlays would print one document which includes both overlays.
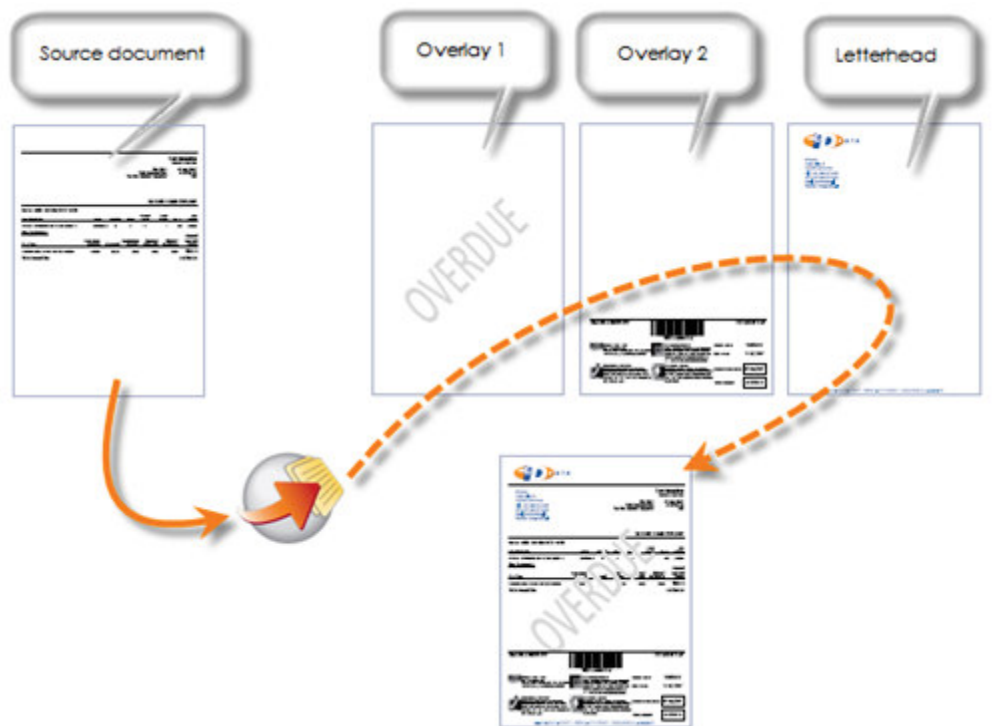
FIGURE 17 - showing AutoDoc HSE using overlays and a letterhead to produce final output combining all of these elements, as occurs for command-based overlays. Multi-drop overlays actually produce a different set of copies for each overlay applied, rather than 'stacking' overlays on top of each other.

Note that, when printing to physical printers from AutoDoc HSE, the size of the print spool file will be reduced significantly (up to 10MB per page – with an accompanying increase in processing speed) by disabling the destination printer's 'advanced printing features'. This setting is located in the Advanced tab of the destination printer's properties (see Figure 18), and can be disabled by clearing the *Enable advanced printing features* checkbox. As always, we recommend that you test this configuration to ensure that disabling the advanced printing features has no adverse impact on your usual printer operations.
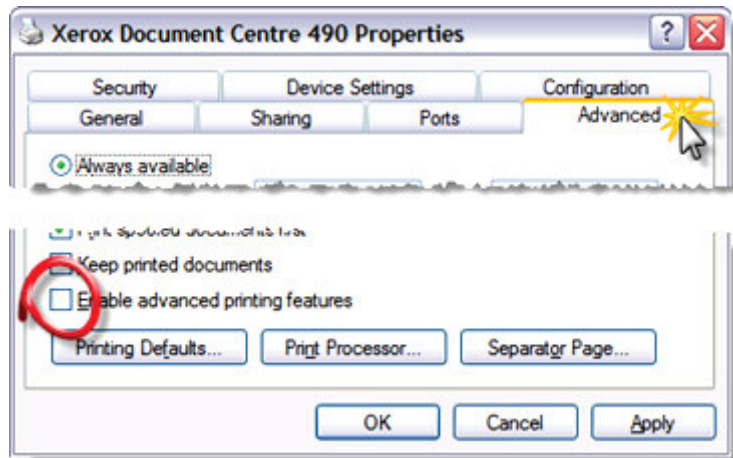
FIGURE 18 - the *Enable advanced printing features* checkbox.

Multi-Drop Printing

Multi-drop printing facilitates the printing of documents to multiple printers and trays, together with a variety of settings affecting the final layout.
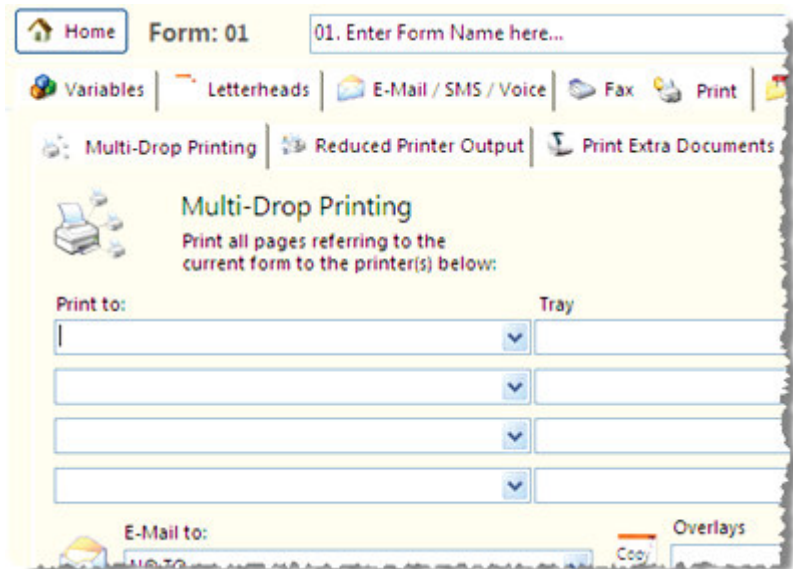
The following table provides detail for each of the controls in the Multi-Drop Printing tab:

Control Name	Control Description
Print to	Use this group of drop-down lists to specify, optionally, the printer(s) on which a copy of all pages processed by this form will be printed, regardless of any other

AutoDoc HSE delivery method settings.

The printers available in the drop down list will be determined by whether the AutoDoc HSE user service is running (see page 18 for more details on the user service). If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed.

"Print to User printer #..." options are also available. These options specify that all pages in the print job, processed by the current form, will be sent to the printer associated with the user who sent the print job to AutoDoc HSE. This association is defined in the global setup Users tab. If the Windows user who queues the job is not registered as an AutoDoc HSE user, the job is treated as being from the Default User, and in this case that profile is used to determine the 'User printer' to be used.

Note that if user printers have been specified in the user's client viewer (see the section starting on page 193), these settings will take precedence over the user printer settings specified here in the global setup area.

Tray	Use this group of drop-down lists to specify the tray to which the print job should be printed, for the associated printer.
Copies	Use this group of text controls to specify the number of copies to print to the associated printer.
	Note that the number of copies specified here will overrule the number of copies that may be specified in the print job itself. To override this behaviour so that the number of copies is determined by the print job, set AutoDoc HSE's number of copies to zero.
	Note also that if more than one of the *Copy #1-3* checkboxes have been checked, this may result in multiple copies being created for each of the number of copies specified in the *Copies* field, or in the print job itself.
Use letterhead	Use this group of checkboxes to specify whether any letterheads selected in the Letterheads tab should be included in the multi-drop printouts.
Attach PDF	Use this group of checkboxes to specify whether the extra PDF files specified in the *Extra PDF files to add to the*

	print control should be included in the multi-drop printouts for the associated printer.
No Main Document	Use this group of checkboxes to specify whether the source document itself should be excluded from the associated printer's output, such that only the extra PDF files specified in the *Extra PDF files to add to the print* control should be output.
Copy #1-3	Use these checkboxes to specify, optionally, overlays to be applied to the print jobs from the associated printers. The #1, #2, #3 options relate to the *Copy #1-3 Overlays* text controls on this tab.
	Note that overlays will only be laid on top of the source document if the *Foreground* option is selected in the PDF Watermark group of the Global setup *PDF* tab.
Copy #1-3 Overlays	Use these text controls to specify, optionally, overlays to be applied to the print jobs under this form. The filename and path of the overlay file can be entered directly into the control (enclosed in quotation marks), or selected using the browse button to the right of the control.
	Note the important information regarding file locations on page 50.
	Three separate overlays can be specified for each form, and any combination of these overlays can be specified for each multi-drop printer, via the *Copy #1-3* checkboxes.
	We especially recommend that you test your multi drop configuration thoroughly due to the number of factors that can affect output.
Use EOP	Use this group of checkboxes to specify that the associated multi-drop printer should take the EOP (end of page) command into account. With the checkbox checked, any EOP commands found in the source document will result in the print job being processed as separate jobs.
	If the checkbox is not checked, EOP commands in the document will still be recognised for page breaks, but the pages will still remain part of the same print job.
	See page 159 for more detail on the basic use of the EOP command.

E-mail to	Use this drop-down list to specify an addressee to whom a PDF version of the source document will be sent.
	This is effectively a highly simplified version of the E-mail tab, and allows an e-mail to be sent without including an e-mail command or translation in the print job.
	In addition to all users created in the Users tab, the following possible pre-set *To* entries exist in the drop-down list:

- NO TO – this is the default entry, and specifies that a CC e-mail will not be created.

- CREATOR/OWNER – specifies that an e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.

- DEFAULT USER – specifies that an e-mail will be sent to the e-mail address of the Default User (as specified in the Users page).

	Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons. Variables can also be used in e-mail addresses.
Sort on	Use this field to specify a text string that AutoDoc HSE will use as a trigger upon which to collate multi-drop output.
	For example, sorting on %customername% would collate printouts where the customer name is the same.
	Note that the *Use EOP* checkbox must be checked for collation to occur.
	Collation can occur across different forms. For example, if a print job has pages that print to form 1 and form 3, provided the EOP command is present and forms 1 and 3 print tabs are configured to trace the EOP command, if both forms are also configured to sort on %customername%, then any pages with the same customer name will be collated and printed together, regardless of what form number they're printed under.

Extra PDF files to add to the print	Use this control to specify the paths and filenames of any extra PDF files to be appended to hard copies created via this form, for multi-drop printing.
	The file path and file name can include system variables. For example, if a user with an AutoDoc HSE username of 'PeterM' and company name 'XYZ Electrical' enters a file path as:
	`C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf`
	…this would result in the 'specials.pdf' file, which resides in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being appended to the print out.
	Files can be 'dragged and dropped' into this control. This copies the filename and path to the control, leaving the original file in its original location.
	Note that only PDF files can be appended to hard copies using this control, and also note the important information regarding file locations on page 50.

Reduced Printer Output

Reduced Printer Output enables "exception-based printing", whereby hardcopies are produced for print jobs that don't result in an e-mail or fax transmission being produced. As for multi-drop printing, documents can be directed to multiple printers and trays, together with a variety of settings affecting the final layout.
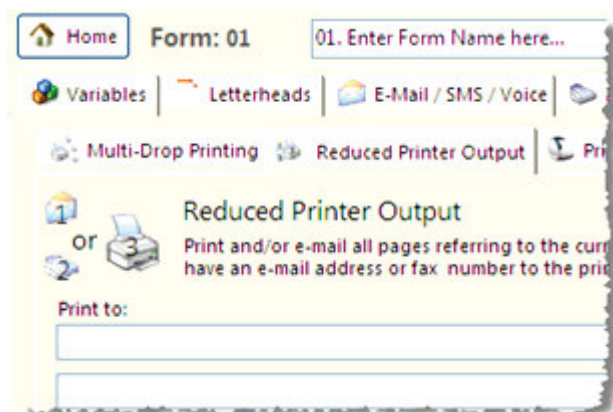
The following table provides detail for each of the controls in the Reduced Printer Output tab:

Control Name	Control Description
Print to	Use this group of drop-down lists to specify, optionally, the printer(s) on which a copy of all pages processed by this form will be printed, if other AutoDoc HSE output includes neither an e-mail or fax transmission.
	The printers available in the drop down list will be determined by whether the AutoDoc HSE user service is running (see page 18 for more details on the user service). If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed.
	"Print to User printer #..." options are also available. These options specify that output will be sent to the printer associated with the user who sent the print job to AutoDoc HSE. This association is defined in the global setup Users tab. If the Windows user who queues the job is not registered as an AutoDoc HSE user, the job is treated as being from the Default User, and in this case that profile is used to determine the 'User printer' to be used.
	Note that if user printers have been specified in the user's client viewer (see the section starting on page 193), these settings will take precedence over the user printer settings specified here in the global setup area.
Tray	Use this group of drop-down lists to specify the tray to which the print job should be printed, for the associated printer.
Copies	Use this group of text controls to specify the number of copies to print to the associated printer.
	Note that the number of copies specified here will overrule the number of copies that may be specified in the print job itself. To override this behaviour so that the number of copies is determined by the print job, set AutoDoc HSE's number of copies to zero.
Use letterhead	Use this group of checkboxes to specify whether any letterheads selected in the Letterheads tab should be included in the reduced printer output printouts.
Attach PDF	Use this group of checkboxes to specify whether the extra PDF files specified in the *Extra PDF files to add to the print* control should be included in the reduced printer

output printouts for the associated printer.

Attach PDF	Use this group of checkboxes to specify whether the source document itself should be excluded from the associated printer's output, such that only the extra PDF files specified in the *Extra PDF files to add to the print control* should be output.
Use EOP	Use this group of checkboxes to specify that the associated printer should take the EOP (end of page) command into account. With the checkbox checked, any EOP commands found in the source document will result in the print job being processed as separate jobs.

Use this group of checkboxes to specify that the associated multi-drop printer should take the EOP (end of page) command into account. With the checkbox checked, any EOP commands found in the source document will result in the print job being processed as separate jobs.

If the checkbox is not checked, EOP commands in the document will still be recognised for page breaks, but the pages will still remain part of the same print job.

See page 159 for more detail on the basic use of the EOP command. |
| *E-mail to* | Use this drop-down list to specify an addressee to whom a PDF version of the source document will be sent.

This is effectively a highly simplified version of the E-mail tab, and allows an e-mail to be sent without including an e-mail command or translation in the print job.

In addition to all users created in the Users tab, the following possible pre-set *To* entries exist in the drop-down list:

▪ NO TO – this is the default entry, and specifies that an e-mail will not be created.

▪ CREATOR/OWNER – specifies that an e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc HSE. Note that if the Windows user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail. |

	▪ DEFAULT USER – specifies that an e-mail will be sent to the e-mail address of the Default User (as specified in the Users page). Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons. Variables can also be used in e-mail addresses.
Sort on	Use this field to specify a text string that AutoDoc HSE will use as a trigger upon which to collate reduced printer output. For example, sorting on %customername% would collate printouts where the customer name is the same. Note that the *Use EOP* checkbox must be checked for collation to occur. Collation can occur across different forms. For example, if a print job has pages that print to form 1 and form 3, provided the EOP command is present and forms 1 and 3 print tabs are configured to trace the EOP command, if both forms are also configured to sort on %customername%, then any pages with the same customer name will be collated and print together, regardless of what form number they're printed under.
Extra PDF files to add to the print	Use this control to specify the paths and filenames of any extra PDF files to be appended to hard copies created via this form, for reduced printer output printing. The file path and file name can include system variables. For example, if a user with an AutoDoc HSE username of 'PeterM' and company name 'XYZ Electrical' enters a file path as: `C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf` …this would result in the 'specials.pdf' file, which resides in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being appended to the print out. Files can be 'dragged and dropped' into this control. This copies the filename and path to the control, leaving the original file in its original location. Note that only PDF files can be appended to hard copies using this control, and also note the important information regarding file locations on page 50.

Print Extra Documents / Labels

The Print Extra Documents / Labels tab facilitates a mail-merge-type function whereby variables captured in the AutoDoc HSE print process can be used to populate an external template file. See page 213 for more details and examples.

The following table provides detail for each of the controls in the Print Extra Documents / Labels tab:
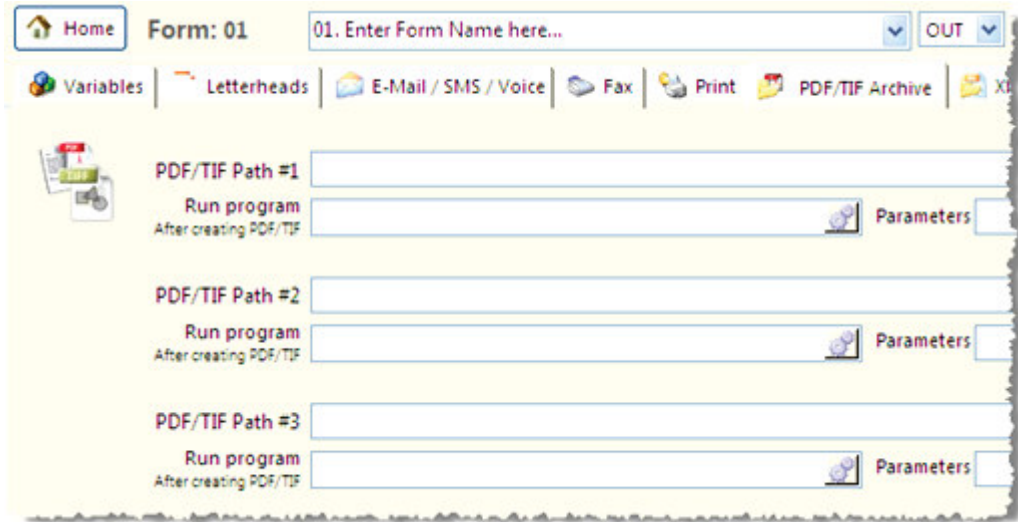
Control Name	Control Description
Variables (Group by)	Use this text control to specify a header variable by which output should be grouped. The variable should be specified complete with the percentage (%) characters.
RTF/TXT/SQL Template file	Use this text control (and associated browse button) to specify the location of the external template file which will be used as the basis for the mail-merge. See page 50 for important information regarding file locations. The template file must be in RTF or TXT format. RTF files are merged with the variable data and converted to PDF before being printed, while TXT files are merged with variable data with the resultant RAW data being sent direct to the specified printer. Using a printer that is not capable of processing RAW data will result in no

output from a TXT template.

AutoDoc HSE will also look for a SQL file of the same filename and location specified here and, if found, will use this SQL file to perform a reverse lookup query (overriding any Reverse lookup query specified in the Variables tab).

Printer	Use this drop-down list to select the printer to which the extra documents will be directed.
Tray	Use this drop-down list to specify the tray to which the extra documents will be directed.
Copies	Use this text control to specify the number of copies of the extra documents to be printed to the associated printer. This field can be overridden dynamically by the %copies% header variable (see point 2 on page 216 for more information on the %copies% variable).

PDF/TIF Archive

The PDF/TIF Archive tab is part of the form setup view, and is used to define the archive files that should be produced under the form in question.

AutoDoc HSE's PDF/TIF archive function saves a PDF/TIF copy of the source document to a user-defined location. Up to three file paths can be specified if there is a need to store multiple copies of the file.

Any document processed by an AutoDoc HSE form which has an archive file path specified, will be archived.

The AutoDoc HSE variables are particularly useful for archiving, as they can be used to construct a file path and/or file name for the archive document, which can therefore reflect various contexts of the document's creation to provide a logical, dynamically created archive path. For example, you may specify an archive path and filename as:

```
c:\clients\%accname%\correspondence\%doctype%s\%yyyy%%mm%%dd%
%fullname%.pdf
```

…where %accname% and %doctype% are user-defined variables (as defined in the Variables tab). Such an archive entry could result in a file name and path as follows:

```
c:\clients\ABC Automotive\correspondence\Tax Invoices\20050430
Peter McKenzie.pdf
```

Note that if variables specified in an archive path contain 'special' characters (such as a colon), these may be stripped from the variables to facilitate their use. As always, you should test your configuration to be certain of its output.

Note also that the filename and path specified do not need to be 'unique'. If AutoDoc HSE is instructed to create a file which already exists, it can either overwrite, or append more content to, the existing file.

Please see page 50 for important information regarding file locations.

Third-Party Document Management and Scripts

✘ Lite
✘ Standard
✘ Server
✓ Enterprise

The PDF/TIF Archive functionality also facilitates the use of a third-party application to provide application-specific functionality to the archive process. Each form allows the optional nomination of a third-party application, together with run-time parameters to be passed to this application.

Similarly, a *.vbs Visual Basic script can be specified here to run that script after the creation of the archive file.

Offsite archiving via FTP

The PDF/TIF Archive functionality also facilitates archiving to an FTP-enabled server. This is achieved with a specific syntax in the archive path:

```
ftp://<userid>:<password>@<ftphost>:<portnumber>:<passive>/<rootdir>//<subdir>/<filename>
```

For example, the following configuration would archive a file by FTP:

```
ftp://john:PassW0rd@ftp.mysite.net:21:passive/var/www/vhosts/www.mysite.net//HTML//archives/output.pdf
```

The following table provides detail for each of the controls in the PDF/TIF Archive tab:

Control Name	Control Description
PDF/TIF Path #1-3	Use these text controls to enter the file path and name of the PDF/TIF archive file.
	Please note the important information about file paths on page 51.
	All the AutoDoc HSE variables can be used in this control.
	Any specified path and filename that does not exist will be created by AutoDoc HSE as part of the archive process.
	Any variable that does not exist in a document will be ignored for the purposes of the archive path and

filename. For example, you may specify an archive path and filename as:

```
c:\clients\%accname%\correspondence\%doctyp
e%s\%yyyy%%mm%%dd% %fullname%.pdf
```

…where %accname% and %doctype% are user-defined variables. Such an archive entry could result in a file name and path as follows:

```
c:\clients\ABC
Automotive\correspondence\Tax
Invoices\20050430 Peter McKenzie.pdf
```

However, if the variable %accname% has not been used in the source document, the path would be constructed as:

```
c:\clients\correspondence\Tax
Invoices\20050430 Peter McKenzie.pdf
```

Any user-based variables (such as %fullname%) are derived from the user profile (as defined on the Users tab) of the user who sent the print job to AutoDoc HSE. If the Windows user who queues the job is not registered as an AutoDoc HSE user, the job is treated as being from the Default User, and that profile is used instead.

For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 33 or, alternatively, press the F1 keyboard key.

If only a filename is specified, with no path, the file will be stored in the default location, which is the folder in which the AutoDoc HSE application is installed.

If a *.pdf or *.tif file extension is not specified in the filename, a PDF file extension will be applied.

As described on page 145, an FTP command line can be used in this control, to facilitate FTP archiving.

Use letterhead	Use these checkboxes to specify whether any letterheads selected in the Letterhead tab should be included in the archive file for this form, for the PDF/TIF (1-3) path specified.
Overwrite PDF	These checkboxes determine AutoDoc HSE's behaviour when the specified archive file name and path already exist, for a PDF file. In such a case, AutoDoc HSE can either overwrite the existing file, or append the contents of the current source document to the end of the existing PDF archive file.

> Note that for TIF format, files which already exist will automatically be overwritten – there is no option to append to a TIF file.

✖ Lite
✖ Standard
✖ Server
✓ Enterprise

Run program

Use these controls (together with the associated browse buttons) to specify, optionally, a third-party application's executable (*.EXE or *.BAT), or Visual Basic script (*.VBS) file to be invoked by AutoDoc HSE to handle additional document management tasks.

These controls are used in conjunction with any parameters specified in the *Parameters* controls.

Please note the important information about file paths on page 51.

Parameters

Use these controls to specify any parameters required by any third-party applications specified in the associated *Run program* controls.

A number of variables can be used here:

- %pdf%, %tif%, %tiff%, %fullpath%, %filename% and %file% are different variable names which all reference the file and path created in the associated *PDF/TIF Path* controls, enabling the file to be passed as a parameter to the application(s) being invoked.

- %xpdf% references the hexadecimal representation of the contents of the PDF file, and can be used in a SQL query to insert the file into a database field with a BLOB data type.

- %text% references the textual contents of the PDF file.

- %html% references a html representation of the PDF file.

Adding `wait` to the end of the parameter string will result in AutoDoc HSE waiting for the third party program to finish its processing, before AutoDoc HSE continues its own processing. The 'wait' parameter works for an executable file, batch file, or Visual Basic script, but has no effect for a SQL script (since SQL scripts are already treated in the same fashion as results

	from the 'wait' parameter).
Signed PDF Path	Use this text control to specify the path to which copies of any digitally signed PDFs should be stored (as per the optional digital signature functionality on the PDF tab of the Global setup area). This duplication feature facilitates the storage of exact copies of digitally signed documents (including the duplication of the signature itself).
Title	Use this text control to specify a document title to be included in the PDF document properties for archived files using this form.
Author	Use this text control to specify an author to be included in the PDF document properties for archived files using this form.
Subject	Use this text control to specify a document subject to be included in the PDF document properties for archived files using this form.
Keywords	Use this text control to specify keywords to be included in the PDF document properties for archived files using this form.
Open Password	Use this text control to specify a password to be included in the PDF document properties for archived files using this form. A password specified here will prevent the document being opened, unless the person opening the document can supply this password. The password specified here cannot be the same as the password specified as the *Owner Password.* The open password will only be enforced if an owner password has also been specified.
Owner Password	This text control is only visible if an owner password has been specified here in an earlier version of AutoDoc HSE. Later versions use the Owner Password specified in the PDF tab within the Global setup area. Use this text control to specify a password to be included in the PDF document properties for archived files using this form. A password specified here will create a secured PDF, and prevent the document's properties (including security properties) being edited. The password specified here cannot be the same as the

✖ Lite
✖ Standard
✔ Server
✔ Enterprise

	password specified as the *Open Password.*
Encryption	Use this drop down list to specify the encryption level for any secured PDF archive files created under this form.
Print the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still print the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
Copy text and graphics from the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still copy text and graphics from the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
Add comments to the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still add comments to the file (if using software which supports this function). If the checkbox is cleared, such a user cannot perform this operation with the file.
Change the PDF file	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, as specified in the PDF tab of the global setup area, can still change the file (if using software which supports this function). If the checkbox is cleared, such a user cannot perform this operation with the file.

XML Archive

The XML Archive tab is part of the form setup view, and, if functional in your version of AutoDoc HSE, is used to define the archive files that should be produced under the form in question.

As for PDF/TIF archiving, XML archiving supports FTP archiving (see page 145 for details).

AutoDoc HSE's XML archive function saves an XML-type file copy of the source document to a user-defined location. The file can be created with any of the following extensions: XML, TXT, XLS, and XLT. Up to three file paths can be specified if there is a need to store multiple copies/outputs of the file. The XML-type file is produced to the XML specification provided in the Variables tab.

Any document processed by an AutoDoc HSE form which has an archive file path specified, will be archived.

The XML archive function can also be configured to work with label writers (for example, a Dymo® label writer) to allow, for example, address labels to be printed directly from a packing list. Contact Streamline Software for more information on this feature (also see page 213 for information on template-based label printing).

As for PDF archiving, the AutoDoc HSE variables are particularly useful for XML archiving, as they can be used to construct a file path and/or file name for the XML-type document, which can therefore reflect various contexts of the document's creation to provide a logical, dynamically created archive path. For example, you may specify an archive path and filename as:

```
c:\clients\%accname%\correspondence\%doctype%s\%yyyy%%mm%%dd%
%fullname%.xml
```

…where %accname% and %doctype% are user-defined variables (as defined in the Variables tab). Such an archive entry could result in a file name and path as follows:

```
c:\clients\ABC Automotive\correspondence\Tax Invoices\20050430
Peter McKenzie.xml
```

Note that if variables specified in an archive path contain 'special' characters (such as a colon), these may be stripped from the variables to facilitate their use. As always, you should test your configuration to be certain of its output.

Please see page 50 for important information regarding file locations.

The following table provides detail for each of the controls in the XML Archive tab:

Control Name	Control Description
XML Path #1-3	Use these text controls to enter the file path and name of the XML-type archive file (with an XML, TXT, XLS, or XLT file extension).
	If AutoDoc HSE is instructed to create an XML-type file which already exists, it will overwrite the existing file.
	Please note the important information about file paths on page 51.
	All the AutoDoc HSE variables can be used in this control.
	Any specified path and filename that does not exist will be created by AutoDoc HSE as part of the archive process.
	Any variable that does not exist in a document will be ignored for the purposes of the archive path and filename. For example, you may specify an archive path and filename as:
	`c:\clients\%accname%\correspondence\%doctype%s\%yyyy%%mm%%dd% %fullname%.txt`
	…where %accname% and %doctype% are user-defined variables. Such an archive entry could result in a file name and path as follows:
	`c:\clients\ABC Automotive\correspondence\Tax Invoices\20050430 Peter McKenzie.txt`
	However, if the variable %accname% has not been used in the source document, the path would be constructed as:
	`c:\clients\correspondence\Tax`

```
Invoices\20050430 Peter McKenzie.txt
```

Any user-based variables (such as %fullname%) are derived from the user profile (as defined on the Users tab) of the user who sent the print job to AutoDoc HSE. If the Windows user who queues the job is not registered as an AutoDoc HSE user, the job is treated as being from the Default User, and that profile is used instead.

For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 33 or, alternatively, press the F1 keyboard key.

If only a filename is specified, with no path, the file will be stored in the default location, which is the folder in which the AutoDoc HSE application is installed.

As described on page 145, an FTP command line can be used in this control, to facilitate FTP archiving.

Run program	These controls behave in the same manner as their counterparts for PDF/TIF Archiving (see the control definitions on page 147).

These controls can also accept an *.RTF or *.TXT file to enable AutoDoc HSE to work with label writers. Contact Streamline Software for more information on this feature (also see page 213 for information on template-based label printing). |
| *Parameters* | These controls behave in the same manner as their counterparts for PDF/TIF Archiving (see the control definitions on page 147).

The %xml% variable can be used in these controls to represent the name of the file created in the associated *XML Path* controls, enabling the filename to be passed as a parameter to the application(s) being invoked. |

Document content configuration

When printing to AutoDoc HSE, document content largely determines how AutoDoc HSE will deliver the document. This chapter details how AutoDoc HSE interprets document content, to ensure you avoid some of the possible pitfalls, and to allow you to make the most of AutoDoc HSE's functionality.

This chapter covers the following broad topics:

- What does AutoDoc HSE look for?

- Processing rules

- Recommendations

- Notes on AutoDoc HSE's environment

What does AutoDoc HSE look for?

On printing to the AutoDoc HSE virtual printer, processing information can be passed to AutoDoc HSE even before the print job itself has been analysed. This information can include:

- The form number under which the job should be processed (see the section on form numbers on page 47)

- The chosen virtual tray of the AutoDoc HSE printer to which print jobs are directed. As applies for real printers, a user printing to AutoDoc HSE has the option of selecting the tray to which the job should be directed. The AutoDoc HSE administrator can set different paper options per tray.

As discussed in the "Font colour" section of Chapter 3, AutoDoc HSE assesses the colour of document text to determine which text constitutes a textual command and which text constitutes a user-defined variable (as defined in AutoDoc HSE's Variables tab). Textual commands are then further assessed as detailed in the following sections.

Delivery method commands

The following textual command types, if present, determine which delivery methods will apply:

- Textual commands that are one or two numerical characters (for example, `2`, `02`, or `95`), are recognised as representing an AutoDoc HSE form number. Since archive and hard copy delivery instructions are configured within the AutoDoc HSE console on a form-by-form basis, the form number (or translation to a form number) specified in a document usually determines whether these delivery methods will be applied to the document. Note the information regarding the Default form, starting on page 47, which may apply when no form number is specified in the document.

- Textual commands that are three or more characters in length, and are all numeric, or a combination of numeric and blank spaces (for example, `03 12345678` or `7  3`), are recognised as fax numbers to which the document should be sent. Numbers with brackets are also recognised (for example, `(03) 12345678`), as are forward slashes (for example, `03/12345678`), and plus symbols for international dialling (for example, `+61212345678`).

- Textual commands that are in the format of a valid e-mail address are recognised as e-mail addresses to which the document should be sent.

- SMS commands are recognised as: `<RecipientPhoneNumber>@SMS`. The phone number is dynamically formatted as per the description starting on page 72).

Content commands

The following textual commands, if present, affect the content of e-mails and the timing of faxes, as detailed:

- Textual commands that are an existing local filename and path (for example, `c:\marketing\product overviews\AutoDoc HSE.pdf`) are recognised as a file that will be attached as a separate PDF to e-mails produced by AutoDoc HSE. Such a command is essentially a document-based equivalent of the *Attach PDF attachments to the Main PDF* field in the E-mail / SMS / Voice tab of the form setup area (see page 123).

- Textual commands that are an existing filename (including extension) of a PDF file located in the overlays directory (<AutoDoc HSE installation folder>\HSEOverlays\), for example, `InvoiceOverlay.pdf` located in `C:\Program files\AutoDoc HSE\HSEOverlays`, are recognised as a file to be processed as an overlay in PDF output. See page 132 for more information on overlays.

- Textual commands that are two capital letters that match an abbreviation on a language tab in the Fax and E-mail / SMS / Voice tabs (for example, `FR`), are recognised as a language, and the corresponding language's 'sub-form' will be applied.

- A text string `EOP` (End of Page) in textual command colour will force a 'page break' in the print job. See the section on "Breaking up merged document output", beginning on page 159.

> Note that textual commands are assessed on a page-by-page basis. For example, if an individual page does not feature a fax number, it will not be included in the fax. The equivalent is true for e-mail addresses. However, please see the following "Processing rules" section for details on how AutoDoc HSE interprets textual commands in a multiple-page document.

Processing rules

By the very nature of AutoDoc HSE functioning as a virtual printer which receives input from a potentially unlimited number of third-party applications, it is problematic to define the limits of the functionality that may be required of the AutoDoc HSE system. For example, it is not impossible for AutoDoc HSE to

encounter a document which has 20 textual command e-mail addresses in the first page, and another, different, 20 e-mail addresses in the next, as well as 20 textual command fax numbers.

However, to ensure AutoDoc HSE performs in a seamless manner for what we have seen to be the majority of cases, definite processing rules have been established. We encourage feedback and ask that, should you encounter a situation where AutoDoc HSE does not provide the functionality you require, you would contact us via our website, http://www.streamlinesoftware.net.

AutoDoc HSE does allow for multiple e-mail addresses and fax numbers, and indeed different e-mail addresses and fax numbers on different pages. AutoDoc HSE's processing rules are defined in the following sections.

Processing multiple textual commands

E-mail addresses, fax numbers, form numbers, fax scheduling commands, file attachment commands, and language commands, are processed as follows, assuming that no EOP (end of page) command has been used.

1. If pages do not have a form number (either as a textual command, or as a translated form number), the default form will be used (see page 47 for full details on the default form hierarchy), unless form numbers are inherited from previous pages (see rule 3).

2. If a page has more than one form specified (either as a textual command, or as a translated form number), the last form number occurring on the page will be applied.

3. Whenever a form number is encountered in a document, that form number will apply to all subsequent pages in a document, unless another form number is found. This rule overrides rule 1 above – for example, if the first three pages have no form number, the fourth has form 2, and the remainder of the pages have no form number, the default form will be applied to the first three pages, and form 2 will be applied to the remainder of the document. If page 5 were to have form 6, the default form would apply to pages 1-3, form 2 to page 3-4, and form 6 to pages 5 onwards.

4. E-mail addresses, fax numbers, and file attachment commands, are assessed as follows:

   a. Any pages with multiple e-mail addresses will be reproduced into multiple outputs: one e-mail per e-mail address (however, see page 69 for information on using semicolons in e-mail address commands to combine deliveries).

b. If multiple pages include the same e-mail address, these will be merged into one output and e-mailed to that address (see the section below called "Breaking up merged document output" on page 159 for information on preventing this default behaviour).

c. Rule 4b does not apply if the pages on which the e-mail address occurs are processed under different form numbers. In this case, an e-mail will be produced for each form for which that address occurs.

d. Fax numbers will be treated in an identical manner as e-mail addresses as per the above points.

e. File attachment commands are associated only with e-mail addresses that occur on the page on which the file attachment command also occurs. If more than one file attachment command occurs for an e-mail address (either on one page or on different pages), all of the files will be attached to the resultant e-mail(s).

5. Language commands are processed as follows:

a. Not specifying a language results in the default language being applied.

b. Whenever a language command is encountered in a document, that language will apply to all subsequent pages in a document, unless another language is found. This rule overrides rule (a) above – for example, if the first three pages have no language, the fourth has FR, and the remainder of the pages have no language, the default language will be applied to the first three pages, and French will be applied to the remainder of the document. If page 5 were to have ES, the default language would apply to pages 1-3, French to page 3-4, and Spanish to pages 5 onwards.

c. Specifying more than one language per page results in the last language on that page being applied.

6. Archive files are created according to the form number associated with the pages within a document. If a document has 5 pages, the first 2 processed under form 1, and the remainder under form 2, only the first 2 pages will be archived to the file location(s) specified in form 1 (if any), and only the last three will be archived to the location(s) specified in form 2 (if any).

Processing multiple user-defined variables

User defined variables are processed as follows, assuming that no EOP (end of page) command has been used:

1. If different text strings on the same page all have RGB settings which represent the same user defined variable, the last string which occurs in

the variable colour populates the variable. For example, if a text string 'Statement', with RGB values 1,1,1 appears in the header of a page, and a text string 'ABC Automotive' with RGB 1,1,1 appears in the body of the document, if variable 1 is defined as RGB 1,1,1, variable 1 will be populated as 'ABC Automotive'.

2. Where pages are processed under different form numbers, a different set of variables is maintained for each form. For example, page 1 has form 01 and accounts@abcautos.com, and variable 1 RGB 1,1,1 text 'Tax Invoice'. Page 2 has form 02, accounts@abcautos.com, and variable 1 RGB 1,1,1 text 'Receipt'. Two separate e-mails will be sent to accounts@abcautos.com, the first where variable 1 is 'Tax Invoice', the second where variable 1 is 'Receipt'.

Where pages are processed under the same form number and language, the following rules apply, assuming that no EOP (end of page) command has been used:

3. User-defined variables are recognised per e-mail address. That is, e-mail addresses a@host.com and b@host.com can appear in the same print job, and may potentially have different values for the same variables. For example, a document may have two pages, the first with the e-mail address accounts@abcautos.com, the second with the address info@kleeneesy.com. Because the document will be sent to two different e-mail addresses, two different sets of the user-defined variables will be maintained by AutoDoc HSE. The user-defined variable named '%accname%' may have a value of 'ABC Automotive' for the e-mail address accounts@abcautos.com, and may have the different value 'Kleeneesy' for the e-mail address info@kleeneesy.com.

4. The *last* instance of an e-mail with user-defined variable combination within a print job determines the text which is stored for that variable for *all* pages in which that variable/e-mail address combination occurs (including any *previous* pages on which that e-mail address occurred).

5. An instance of a user-defined variable that occurs on a page with no e-mail address will be ignored for the purpose of e-mails.

6. Fax numbers with multiple variables will be treated in an identical manner as e-mail addresses as per the above points.

7. The archive function will recognise *each* instance of a user defined variable encountered. For example, consider an archive path of `C:\archive\%accname%.pdf`, where '%accname%' is user defined variable 1, defined as RGB 1,1,1. If page 1 features the text 'ABC Automotive' in RGB 1,1,1, and page 2 features the text 'DEF Services' in RGB 1,1,1, two archive files will be created: `C:\archive\ABC Automotive.pdf` (containing page 1) and `C:\archive\DEF`

`Services.pdf` (containing page 2). If page 1 and page 2 both featured 'ABC Automotive' in RGB 1,1,1, only the one archive file would be created, including both pages.

Breaking up merged document output

In the case of a print run which includes multiple documents for the same recipient (for example, two invoices for accounts@abcautos.com), the two documents would be created as one output file with two pages, sent in one delivery (continuing the example, one e-mail containing one PDF file).

In addition, as can be seen from the previous list of rules, the merging of output by recipient, form, and language, can influence your delivery outcomes. For example, an invoice run may produce two invoices for the same e-mail recipient, and would probably have different invoice totals (for example, $100 and $250). If the invoice total was encoded as variable 1, and the form under which invoices are delivered was configured with the subject heading "Invoice for %1% attached", the output may be unacceptable: a single e-mail containing a single PDF file which contained both invoices, with a subject heading "Invoice for $250 attached". That is, there would be no mention of the first invoice, even though it is included in the PDF (because, as specified under "Processing multiple user-defined variables" rule 4, only the last instance of variable 1 is stored).

If this behaviour does not suit your purposes, you can force a break in the print run. This will result in the two pages being converted to two separate output files, which are contained in two separate deliveries (that is, two e-mails each containing a PDF), and each able to store and use their own instance of variable 1 (so that the appropriate total is listed in each subject heading).

This break is achieved with the EOP (end of page) command. If the text `EOP` is found at the end of a page in a print job, in the colour designating a textual command, it will force AutoDoc HSE to break up the delivery at that point.

> Note that EOP commands have no effect on form numbers or languages. For example, if page 1 of a document is printed to form 3, and page 2 has no form specified, page 2 would be printed under form 3 as well (as per "Processing multiple textual commands" rule 3). If an EOP command were added to the end of page 1, page 2 would still be processed under form 3 and whatever language was applied to page 1 (unless page 2 has a language specified).

Recommendations

Because of the specific nature of AutoDoc HSE's document content tests, it is important that documents are configured in line with the criteria used in these tests, to ensure you achieve the desired output. Also, as with any new component added to your IT setup, ensure you test your configurations with output

contained within your organisation's environment before moving to a production environment, where AutoDoc HSE delivers documents externally.

The following list provides recommendations and highlights some possible document content pitfalls to avoid:

- Wherever possible, add AutoDoc HSE commands to a document in a pre-defined fashion. Many reporting and word-processing applications allow text and database controls to be added to pre-defined reports so that, for example, any Tax Invoice produced from that report has standard layout and content. In such a pre-defined report, a control for the recipient's e-mail address could be added as, for example, a white text field.

- Because fax numbers and e-mail addresses need to be added to each individual page of a document to which they apply, documents in which all pages are to be sent to the same fax number(s) and/or e-mail address(es) can be conveniently configured by adding this information to headers or footers. This ensures the same information is consistently applied to all pages of the document.

- Ensure that the form number, language, each e-mail address, and each fax number are located on individual lines in a document or individual report fields, to ensure you are not giving AutoDoc HSE an instruction which you did not intend. Alternatively, you can separate controls by inserting tabs. For example, specifying the use of form 2 (as '02') on the same line as fax number '1234 5678' can result in a fax being sent to 0212345678. Such a case is usually limited to text editors/word processors where it would be 'logical' to enter a single string containing more than one of the document commands. In the case of pre-defined reports or forms which usually feature discrete fields for different information, use a different font, font style, or font size, to ensure different textual commands on the same page are not merged.

- Ensure that e-mail addresses are not converted to hyperlinks. Some applications will automatically recognise a valid e-mail address and convert it to a hyperlink, which usually results in the text colour changing. This in turn may result in the text not being recognised as an AutoDoc HSE command.

- Remember that if a document is printed to an AutoDoc HSE printer, and a form number has not been specified on the document's pages (either directly, via a translation, or by inheritance from a previous page), the settings of the form applied via the default form hierarchy (see page 47 for more details) may be applied to any such pages, regardless of whether any textual commands exist in these pages or not.

Notes on AutoDoc HSE's environment

Physical printers are notoriously prone to problems in office environments. Even problems that can be solved relatively easily, such as empty paper trays, empty ink cartridges, or a paper jam holding up the queue, all contribute to make printing at the office a common source of frustration.

Unfortunately these physical problems are only one component of a printer's complexities, and upon consideration of the massive variety of jobs a printer can be required to handle (and indeed the massive complexity involved in the process of converting on-screen data to a faithfully reproduced hard copy), it should not be surprising that the data-handling elements of printers and, equally importantly, the applications that print to them, are also prone to anomalies.

```
t.@.y.@...........L....................x...P...6......w.
..4.......N.!......!......9.}....Kv..............T...x..
.%...................
t.@.y.@...........L....................x...\...2.1.2.3.4.5
.6.....................w...4.......N.!......!..
.....9.}....Kv..............T...T
```

FIGURE 19 – two sections of a 'spool' file, created to pass on-screen data to a language that can be interpreted by a printer, allowing it to faithfully reproduce the document in hard copy. The fax number '62123456' is 'hiding' (in sections) somewhere in here!

AutoDoc HSE has been designed to provide a reliable, simple, and flexible means of document delivery, but because it must process supplied print data to achieve these ends, there are some anomalies between how AutoDoc HSE behaves with different applications (and indeed, differences between the third-party applications creating the print jobs).

Notes on third-party applications

This section provides recommendations for using AutoDoc HSE with some common applications.

- When using Clarity Reports, wherever possible, include textual commands in the footer.

- When using Microsoft Word, enter AutoDoc HSE commands/variables on separate lines, or separated by tabs. We recommend this approach to ensure two separate 'strings' of text (such as a fax number of '12345678' and a form number of '9') are not merged into one string (such as the resultant fax number of '123456789' with no form number).

- If using Microsoft Word to create HTML e-mail templates for the *E-mail* tab in the *Form Templates setup* area, we recommend saving the Word document as a 'filtered' web page, which will prevent extraneous additional files being attached to the outgoing emails, which would otherwise be included in Word's standard HTML file format. Other applications such as Open Office Writer will produce cleaner HTML code.

- If using Microsoft Word to create RTF template files, open the template in a simple text editor such as Microsoft's Notepad and check that no variable names have been split; variable names must remain a contiguous text string if they are to be recognised by AutoDoc HSE. To further ensure that the layout of your output is retained, from Microsoft Word print the template document to the printer which will handle the final documents, using any layout preferences you require, and then save the document. Margin and paper sizes settings will then be retained by the RTF file.

- When using Microsoft Excel, be aware that this application has a limited number of font colours available per workbook. Unlike Word, where all the RGB colours are available in any document, Excel stores a palette of available colours per workbook. The number of available colours exceeds the number of user-defined variables AutoDoc HSE uses, but be aware that because Excel workbooks have a limited palette, if you customise a palette colour that has already been used in the workbook, the earlier occurrence of the colour will also change to the new, customised colour.

Printing and Troubleshooting

Printing to AutoDoc HSE is usually the only task the end user has to perform in order to have their documents delivered, archived, and printed, literally at the push of a button. However, you need to know where to look if that isn't happening...

This chapter describes the very simple process of using the AutoDoc HSE printer, and provides a troubleshooting guide to help you identify the cause of any problems that may arise:

- Printing

- Troubleshooting

- The AutoDoc HSE Log

- The Help tab.

Printing

Upon installing the AutoDoc HSE application and running the application as per the instructions in the Installation chapter, an AutoDoc HSE virtual printer is created.

To send a document to the AutoDoc HSE printer, the end user now only needs to choose to print to the AutoDoc HSE printer. In many applications, if an AutoDoc HSE printer has been set as the default printer, this means simply pushing the 'Print' button.
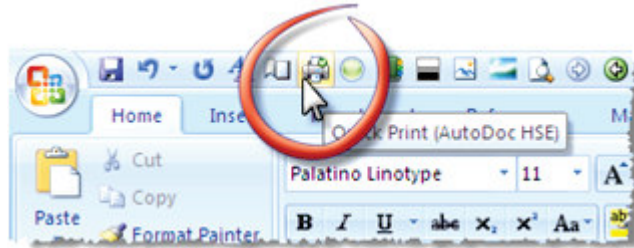
FIGURE 20 – printing to AutoDoc HSE using a toolbar 'Print' button.

Other applications allow the printer of choice to be preset on a case-by-case basis. For example, Tax Invoices may be set to print to AutoDoc HSE, always, so that they are automatically e-mailed/faxed to their recipients, while a Picking Slip may be set to print to an internal laser printer.

However, if an AutoDoc HSE printer is not specified as the printer to be used by an application (either by being set as the system default printer, or as the default for that document type), the user only needs to navigate to the more detailed print menu and choose the AutoDoc HSE printer from the list of installed printers:
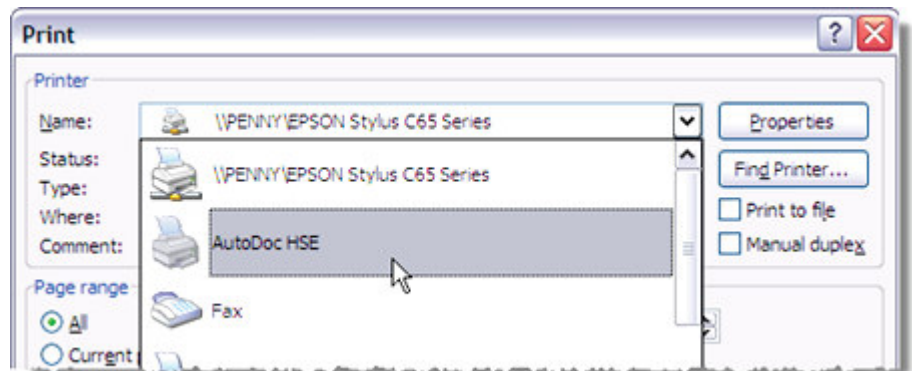
FIGURE 21 – selecting an AutoDoc HSE printer from the list of installed printers, in this case, in Microsoft Word.

Once the user has printed to an AutoDoc HSE printer, AutoDoc HSE takes care of the rest.

Each user should track their own deliveries using the client viewer (see the sections starting on page 181 for more details on using the AutoDoc HSE client viewer).

Troubleshooting

This section outlines some problems you may encounter when using the AutoDoc HSE system, and should be used in conjunction with the AutoDoc HSE log (which is detailed in the next section).

Errors

The following circumstances will result in document delivery errors:

- Incorrect or blank SMTP server/port details when e-mailing

- SMTP server unavailable when e-mailing

- User e-mail address not recognised as valid by SMTP host

- Nominated fax service not available when faxing

- Incorrect fax machine name (for Microsoft Fax) when faxing

- Specified file paths being unavailable to AutoDoc HSE at the time of processing (this can include remote drives which may differ under different user logins – see page 50 for important information on file locations).

- AutoDoc HSE user data folder (as specified on the Users tab of the Global setup area) not shared and accessible to AutoDoc HSE users to read and write.

- Archive file open by another user when AutoDoc HSE tries to access it (AutoDoc HSE will pause, and resume when the file is closed).

- Licensing issues – for example, more users using AutoDoc HSE than are licensed.

- Attaching/processing source PDFs which are secured (e.g. to stop users adding comments to a PDF) can give unpredictable results, and sometimes errors.

Administrator's error notifications

The General tab of AutoDoc HSE's global setup area includes a text control to specify an e-mail address to which error notifications will be delivered. If this control is populated with a valid e-mail address, and AutoDoc HSE is able to send e-mails, details of any error will be e-mailed to that address.

Error notifications are colour coded, indicating the severity of the error. Red errors are fatal (that is, the delivery cannot be completed), while blue errors are non-fatal (that is, the delivery can occur, but may be different to what was expected).
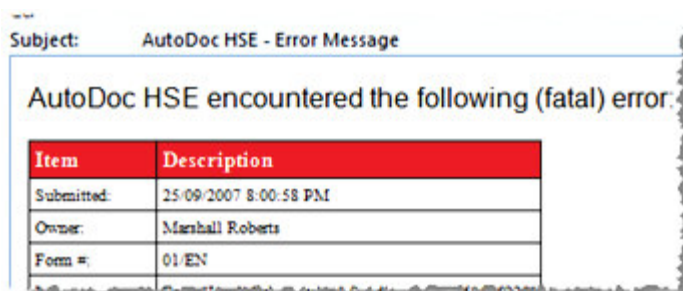
FIGURE 22 - an e-mail from AutoDoc HSE, informing the administrator of a fatal error.

No apparent output

If it seems printing to AutoDoc HSE has produced no output, check the log: has output been reported here? If so, check the status column for any error details, and use the following section on the log details to identify any other information that may provide clues as to the cause of the problem. If no output is reported in the log, consider the following:

- Double-check that you are directing the print job to an AutoDoc HSE printer rather than a physical printer.

- Has your print job been placed in a long queue? A long queue on an AutoDoc HSE printer can be indicative of an error in an earlier print job.

- Does document content actually warrant AutoDoc HSE output? For example, are there any textual commands (form number, e-mail address, and fax number) in the document matching the RGB settings specified in AutoDoc HSE's Installation tab?

- Are textual commands specified in formats recognisable to AutoDoc HSE? See the "What does AutoDoc HSE look for?" section beginning on page 154.

- Check that your document content is in line with the Recommendations set out on page 159, see page 50 for important information on file locations, and ensure that the user data location (as specified on the Users tab of the Global setup area) has permissions set to allow all AutoDoc HSE users to read and write to that directory.

Unexpected output

Unexpected output may be due to an incorrect expectation of how AutoDoc HSE processes document content, or due to the document content itself. Consider the following points:

- Use the following chapter on the log details to identify any information that may provide clues as to the cause of the problem.

- Has a form number been specified in the document? If not, remember settings from the default form specified in the virtual printer's properties may be applied (see page 47 for more details on the hierarchy of forms that can be applied), or a form number from a previous page in a multiple-page document (see page 156 for more details on processing rules).

- Check the Processing rules on page 155 if you are unsure about how, for example, AutoDoc HSE processes a multi-page document with a number of different textual commands and variables. Also, consider the "Recommendations" section staring on page 159, and the "Notes on third-party applications" on page 161.

- Is the Windows user who sent the print job defined as an AutoDoc HSE user? If not, the Default User profile may be used to create the print job. Consider also that different overrules may have been applied (to both the user profile used as the creator of the job, and the destination of the delivery), for e-mail, fax, and archive deliveries.

- If you are using translations, ensure that they are correctly defined (see the two sections on "Translations", starting on pages 38 and 88 respectively). You may need to experiment with more simple translations and their output, before defining complex translations.

- If the problem you are experiencing is related to a specific file (for example, a letterhead not being included, a file not being attached to an e-mail, or an archive file not being created/appended), check that the file locations you have specified are correct. See also the section on "File locations and references" on page 50.

- If the problem you are experiencing is related to the inclusion/position of letterheads, watermarks, or overlays, review the relevant sections in this manual, as there are a number of areas in the application which affect the application of these elements (for example, see pages 65, 105, 132, 132).

- If you are using MAPI e-mail with AutoDoc HSE, ensure that the client viewer is running on the machine which sent the print job.

- If you are not using the 'run as another user service' (as set up in the General tab of the global setup area), consider using this service (see page

18 for more information). This service *must* be running if any of AutoDoc HSE's processes require access to network resources or printers that are not located on the machine on which AutoDoc HSE itself is installed.

If all else fails...

Please contact Streamline Software via www.streamlinesoftware.net, with as much detail on the problem as you are able to provide, for example:

- A copy of the source document

- A copy of a backup of your configuration

- A copy of any output produced

- A copy of the log file.

The AutoDoc HSE main log

AutoDoc HSE features a main log, which lists every document sent to AutoDoc HSE for which AutoDoc HSE has attempted to produce output (e-mailed, faxed, archived, SMS messaged, or printed), as well as user-specific logs, which are available from the client viewers (see the section on AutoDoc HSE client viewers on page 180 for information relating to the client logs).

The main log is accessible via the *Log* button on the AutoDoc HSE home screen:
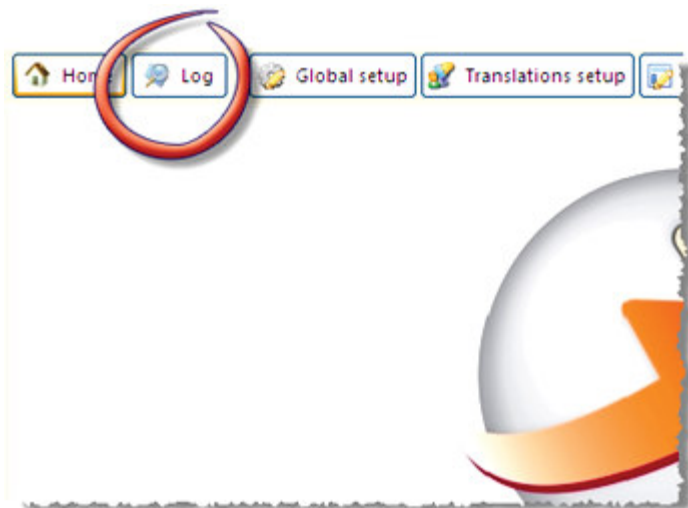
Those documents which have been sent to AutoDoc HSE but do not trigger any e-mailed, faxed, archived, SMS messaged, or printed output, are treated as a print job for which the only action required is PDF creation. Such jobs are processed by the PDF printer and stored in the output tray of the PDF printer of the user who created the print job.

For example, if a 'normal' document (without textual commands) were accidentally printed to an AutoDoc HSE printer instead of an internal laser printer, it would not be faxed or e-mailed. However, since the document also does not include a form number, AutoDoc HSE's default form would be applied. If an archive path or print routing action is specified in the default form, AutoDoc HSE would produce output for this document, and it would thus appear in the main log. If no archive or print routing action were specified in the default form, AutoDoc HSE would process the job with the PDF printer, and store the output in the output tray of the user who sent the job.

The main log is also a vital tool for troubleshooting purposes.

Note that records are logged on a per-recipient basis, and the following are treated as representing different recipients for the purpose of the log:

- A unique e-mail address

- A unique fax number

- A unique SMS number

- A unique archive filename/path

- A unique printer driver (for print routing)

- A unique print routing method (that is, 'exception' printing or multi-drop printing).

- A unique third party application invocation during an archive operation

For example, consider a document that has four pages configured as follows:

- Three pages to be e-mailed to the same address, and one of these pages to also be e-mailed to a different address

- Two of the three e-mailed pages also to be faxed to one fax number, and one of these pages to be faxed to a different number

- Archiving to two file paths, one invoking a third party application

- Exception printing set to print to a HP LaserJet

- Multi-drop printing set to print to the same HP LaserJet and a Canon Laser

- One page with no e-mail address or fax number.

The following ten records would be entered in the log:

- One record for each of the two e-mail addresses (that is, two records)

- One record for each of the two fax numbers (that is, two records)

- Two archive records

- One third party application invocation record

- One record for the one page that has no e-mail address or fax number and is therefore printed to the HP LaserJet on an exception basis

- One record for each of the multi-drop printers (that is, two records).

Note that any errors that occur are also reported in the log.

By default, the log records are sorted in the order they were processed.

There are three tabs within the log view:

- Main log

- Detailed log

- Colours/words

Main log

The main log displays the deliveries, and any errors encountered, by AutoDoc HSE:
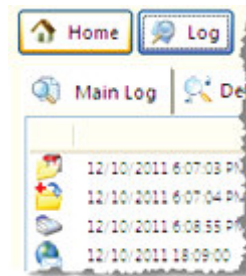
Some useful features of the log include:

- Clicking on a column heading – this rearranges the entries so they are sorted based on the values in that column.

- Any record in the log which has stored content associated, provides a link to that stored content. Double-click on the log record to launch the stored content (for example, double-clicking on an archive record will open the PDF file for viewing). Note that you are unable to open document content

for records that have been cleared from client viewers (see page 181) by the users who created the jobs.

▪ The F10 keyboard key opens the folder in which the selected output record is located.

▪ Tool tip functionality – let the mouse pointer hover over a record for a second or two to retrieve all the log information for that record, without having to scroll across.

The following table provides detail for each of the controls in the Main log tab:

Control Name	Control Description
Clear Log	This button clears all records from the main log. You will be prompted to confirm your choice, and given the opportunity to save a copy of the current log.

Delivery type	This column displays the nature of the record, via an icon:
	
	  = a fax
	
	  = an e-mail sent to the e-mail service
	
	  = an SMS e-mailed to the SMS service
	
	  = an archived PDF file
	
	  = an archived XML file
	
	  = invocation of a third-party application from an archive operation
	
	  = a job redirected to a non-AutoDoc HSE printer
	
	  = a job converted to PDF-and placed in the output tray of the AutoDoc HSE client
	
	  = a job included a textual command form number, but no delivery was produced. Under this scenario, the print job is not converted to PDF either.
	
	  = an error.
	
	Clicking on this column's heading area results in the log being sorted in its default sort order. Where errors are reported, more detail is available in the *E-Mail/ Fax number/ Path/ Printer* and *Status* columns.

Date/Time	This column displays the date/time stamp applicable to

	the processing of the job.
Owner	This column displays the Windows user associated with the print job.
Form #	This column displays the number of the form, and language, under which the AutoDoc HSE job was processed.
E-Mail / Fax number / Path / Printer	This column displays the following content applicable to the delivery: ▪ The recipient e-mail address (for an e-mail) ▪ The recipient fax number (for a fax) ▪ The SMS textual command (for an SMS) ▪ The file path (for an archive operation) ▪ The printer name (for a print job), plus the text `(all pages for the current form)` for multi-drop printing, or `no fax/e-mail` for exception based printing. ▪ The text `Nothing to process!` (indicates a job included a textual command form number, but no delivery was produced. Under this scenario, the print job is not converted to PDF either.) ▪ Error information (for an error).
# Pages	This column displays the number of pages in the delivery. Note that only the pages of a document that have been processed by AutoDoc HSE to create this particular delivery are included in this tally (which may vary from the total number of pages in the source document). In the case of an archive operation, this control lists the number of pages in the resultant PDF file. If your archive file is configured to be appended to, rather than overwritten, the *Pages* control will show the total number of pages in the file after the archive operation, not just the number of pages appended.
Subject	This column displays one of the following: ▪ The subject heading as featured in a fax or e-mail ▪ The SMS message, in the case of an SMS

delivery.

- Originating application and document filename and Windows username and domain/PC name (in the case of an archive operation). If a subject has been specified for the PDF in the form's *Subject* control, this is used as the subject for the log.

- Originating application and document filename and Windows username and domain/PC name (in the case of a print job)

- Originating application and document filename (in the case of a PDF printer conversion)

Attn	This column displays the name of the recipient to whom a fax is directed for attention. This corresponds to the value specified in the *Attn* text control in AutoDoc HSE's form setup Fax tab.
Status	This column displays the progress of the delivery. Completed AutoDoc HSE jobs are specified via one of the following: • `Saved` (for an archive operation) • `Sent to printer` (for a print job) • `Sent to Fax Server` (for a fax job) • `Sent to E-Mail client` (for an e-mail job) • `Sent to SMS client` (for an SMS job) • `Stored` (for a PDF Printer conversion) • `Failed` (or blank) indicates an error. • `Nothing` indicates a job included a textual command form number, but no delivery was produced. Under this scenario, the print job is not converted to PDF either.
Computer Name	This column displays the name of the PC which sent the print job to AutoDoc HSE (as defined in the workstation's property settings).
E-mails, SMS, Faxes, Prints, Archives, XML, Errors	These controls display the number of records displayed in the log for each delivery method (as well as any errors logged). *Archives* refers to PDF archive, while *XML* refers to XML archives.

Detailed log

The detailed log displays a history of the key processing steps performed by AutoDoc HSE for a print job. This information is very useful for troubleshooting purposes, and can also provide valuable information for support requests. The detailed log only lists the detail for jobs that have been processed since the AutoDoc HSE application was opened. Once the AutoDoc HSE application is closed and reopened, the detailed log is cleared.
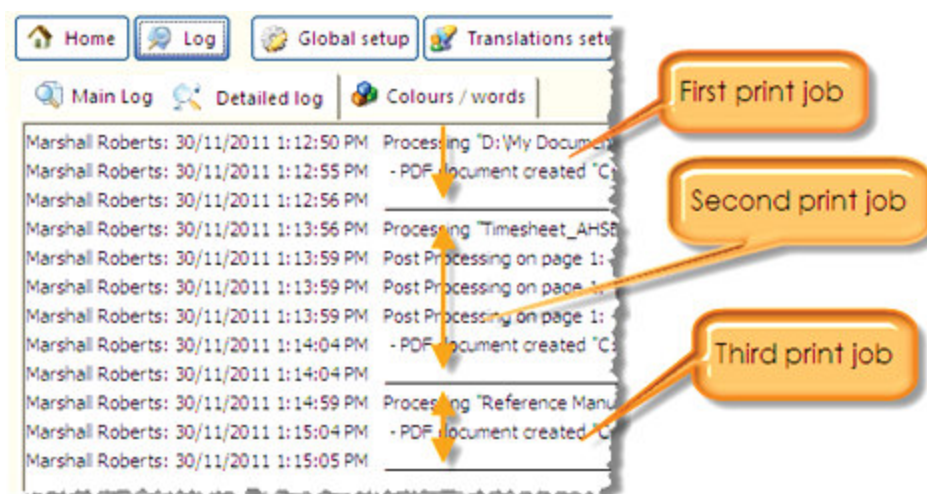
Note that the level of detail in the detailed log, is set in the *General* tab of the global setup area, in the *Detailed Log Level* control.

Colours / words

This tab of the log aids in troubleshooting and configuration, by displaying the text strings located in a print job, together with their colours and regions.

Whereas the main log displays all the print jobs processed by AutoDoc HSE, and the detailed log displays all the detail of jobs processed since the application was opened, the colours/words log only displays the detail from the most recent entry in the detailed log.

The *Copy colour(s)/region(s)* button is used to copy information from this log to the clipboard, to allow the information to be pasted into the Variables tab and/or form independent translations view. This button will copy the information from the highlighted record (or records, if multiples have been selected by using CTRL+click or SHIFT+click). In the case of selecting multiple regions, the resultant pasted region is a single, combined region comprised of the lowest of the *Left* and *Top* values, and the highest of the *Right* and *Bottom* values, and the first text value of the rows selected.

The *to Variables* and *to Translations* buttons enable a quick 'jump' to the Variables and Translations screens respectively.
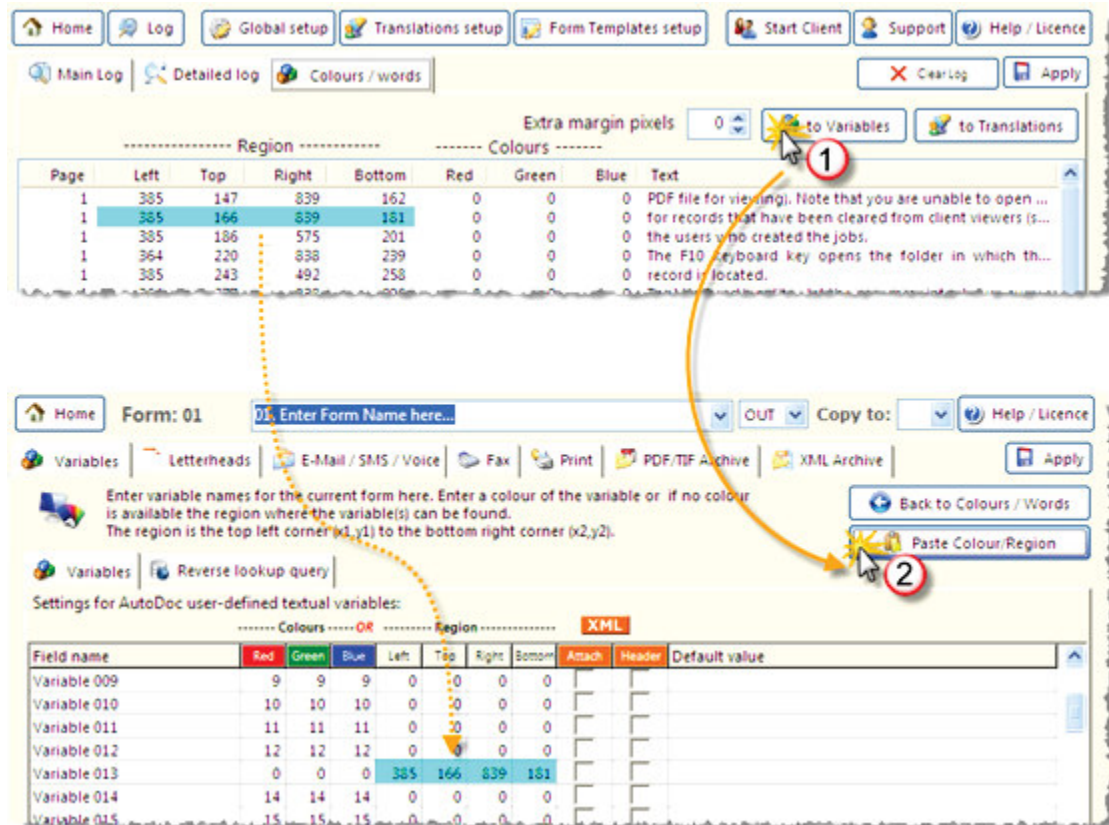
FIGURE 23 – showing a copy/paste operation involving regions copied from the colours/word log, into the form independent translations view. Note that regions will only be included in a copy/paste operation if the RGB values are 0,0,0. The *to Variables* and *to Translations* buttons enable a quick 'jump' to the Variables and Translations screens respectively, and *Back to Colours/Words* button returns you to the *Colours/Words* tab.

If using regions for configuring translations or variables (for example, in the case where RGB colour settings are not available), the following process is recommended:

1. Print the document to AutoDoc HSE under a form which will produce a PDF (use a test configuration which doesn't deliver the document externally).

2. Move to the Log view (go to the home page and then use the *Log* button to open the log view), and then to the Colours / Words tab of the log. This area displays the text strings found in the print job, together with their colours and regions. Depending on whether the strings are identified in a fashion which enables you to isolate them as you wish, you may need to experiment by rearranging your document content (for example, by separating text strings onto different lines to prevent them merging).

3. Use the copy /paste method depicted in Figure 23 above to copy and paste the desired values.

The *Extra Margin pixels* field facilitates quick expansion of a 'found' region. For example, by specifying 10 extra margin pixels, if a *Colours/words* log selection is pasted into variables or translations, the region in question would be expanded by 10 pixels in all directions – left, top, right, and bottom (see Figure 5 on page 38 for a depiction of region definition).

Help & licence

The Help/Licence view is accessible via the Help / Licence toolbar button:
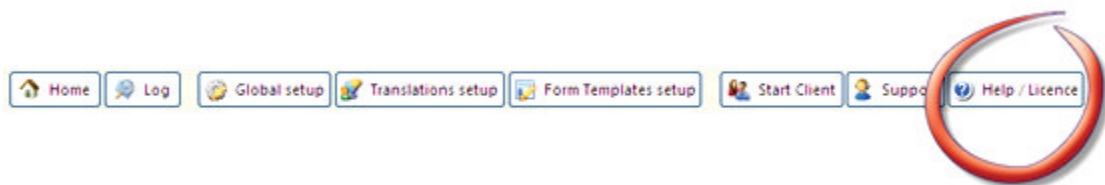
The Help/Licence view serves several functions:

- Provides AutoDoc HSE version information.

- Provides links to AutoDoc HSE documentation (via the *Quick Start Manual* and *Reference Manual* buttons.

- Provides the means of trialling a copy of AutoDoc HSE (via the *Register Now!* controls)

- Provides a means of activating a remote support tool (via the *Remote Support* button if this has been initialised as part of an AutoDoc HSE support request.

AutoDoc HSE can be used in the following ways:

1. As an unregistered trial. You can download the software, install it, and use it. Delivery output will be stamped with a 'trial version' watermark.

2. As a registered trial (free 30 day temporary) licence.

3. As a fully licensed product.

Note that you can use the unregistered trial version of AutoDoc HSE indefinitely, but the trial version output is stamped with a 'trial version' watermark. A free, 30-day licence can be obtained for *any* of the AutoDoc HSE versions, releasing their full functionality (including watermarks removed). To receive a 30-day licence for

this purpose, provide the required details in the *Register Now!* area on the Help/Licence tab, and press the *Request a 30 day unlimited licence* button.

Please contact Streamline Software (www.streamlinesoftware.net) for information on fully licensing your copy of AutoDoc HSE.

AutoDoc HSE

Client viewers

Every AutoDoc HSE user can access their own 'client viewer', which features a user-specific log, as well as some very handy 'extras'.

This chapter details the following:

- Making client viewers accessible

- Using client viewers

- PDF Printer

- PDF Scanner

- The client viewer Setup screen

AutoDoc HSE client viewers

In addition to the main AutoDoc HSE log, which lists every delivery processed by AutoDoc HSE, individual users can also access an AutoDoc HSE log which displays only the deliveries processed under their username. These individual logs are available as AutoDoc HSE 'clients'.

Other than the restriction of this log's content to the user in question, the client log has exactly the same content as the Main log tab of the AutoDoc HSE log. Because the client logs and main log are maintained separately, individual users can clear their own logs without affecting the content of the main log.

In addition to the user-specific logs, the client viewer offers extra functionality to individual users:

- A PDF converter (referred to as the AutoDoc HSE PDF printer) – allowing documents to be converted to PDF and placed in a virtual 'output tray' for manual collection.

- A PDF scanner – allowing image files to be converted to PDF and placed in the virtual output tray.

- Initiation of a remote support session (if requested by Streamline Software).

Before individual users can access their logs, your network administrator may need to make some changes to AutoDoc HSE's user folders.

Note that users' client viewers must be running if AutoDoc HSE is configured to use MAPI e-mail, or if the printer preferences specified within the client viewer are to be used.

While the AutoDoc HSE client viewer also incorporates a PDF Printer and a PDF Scanner, it is important to remember that the client viewer *is not* the AutoDoc HSE virtual printer. While you *can* achieve document delivery with the client viewer (for example, you can e-mail PDF documents of 'scanned' images), it is important to remember that this delivery can be achieved because the client viewer passes the PDF to the AutoDoc HSE virtual printer for processing. It will help your understanding of the client viewer's behaviour if you remember that the client viewer is a separate application.

Making AutoDoc HSE clients accessible

Assuming AutoDoc HSE was installed in the default location, and the client installation process starting on page 26 has been performed, the clients are located in the following location by default:

```
C:\AutoDoc HSE\UserData\<username>\autodochseView.exe
```

If the *User File Location* specified for a user (in the global setup Users tab) differs from the default path, client viewers will reside in that location.

The user corresponding to the <username> folder needs to be given full control to that folder and its contents, with read/write access.

Using client viewers

Once permissions have been set, individual AutoDoc HSE users can run the autodochseView.exe file located in their particular user folder. This launches the client viewer, and also adds an AutoDoc HSE icon to the user's system tray:

If you followed the "Client setup" section on page 26, client viewers should already be running for your users, with the icon in their system trays.

Clicking on this new icon launches the client:
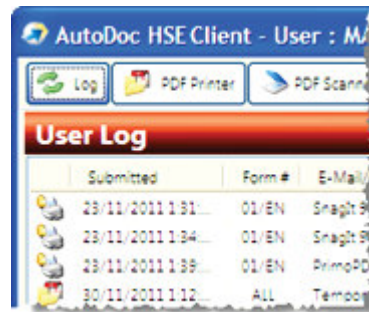
Right clicking on the icon gives view options:

- Open – opens the client for viewing

- Close – closes the client altogether (which requires the user to run the AutoDoc HSEView.exe file again if they want to view the log).

The *Start Client* button on the main AutoDoc HSE home screen can also be used to launch the client viewer.

There are different views within the AutoDoc HSE client viewer:

- Log – which is a 'mirror' of the main log (defined in this manual starting from page 168), but which only contains jobs created by the owner of the client viewer. Note also that the *Clear the Main Log* button in the client viewer only clears the viewer log, and does not clear the log records associated with the main AutoDoc HSE application log. However, clearing log records from the client viewer *will* prevent the actual document content associated with main log records being accessible via the double-click functionality of the main log (see page 170 for more detail on this feature of the main log).

- PDF Printer

- PDF Scanner

- Setup

- Support - this button is used to launch a remote assistance tool, which may be initiated in response to a support request.

PDF Printer

The PDF printer provides 'print-to-PDF' functionality, without performing any actual delivery.

Any job sent to the AutoDoc HSE virtual printer which does not have a form number specified and which does not result in a delivery method being applied, will be converted to PDF and placed in the output tray of the PDF printer of the user's client viewer.
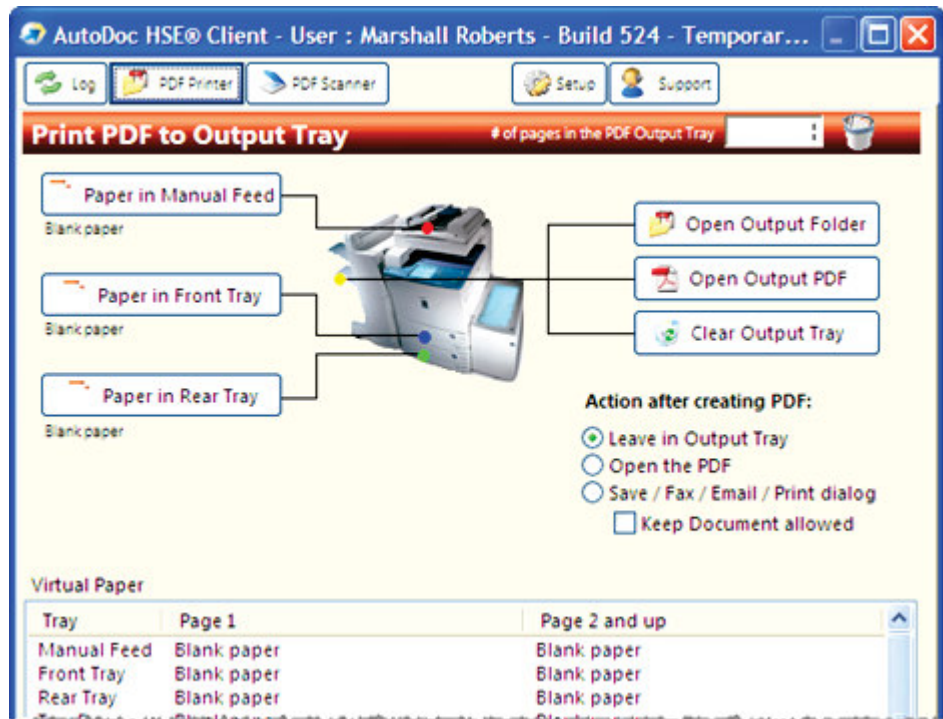
To use the PDF converter to convert a document (for example, a Microsoft Word document) to PDF, simply print the document to the AutoDoc HSE virtual printer. If no form number or delivery command is included in the document, and no delivery method is applied (a delivery method would only be applied in such a case if AutoDoc HSE's default form included a preconfigured delivery method such as an archive path), AutoDoc HSE will simply convert the document to PDF and append it to the user's PDF Printer output tray.

The 'mailback' PDF converter is an alternative to using the above method to achieve simple PDF conversion (see page 203 for information on a mailback configuration).

The following table provides detail for each of the controls in the PDF Printer view:

Control Name	Control Description
# of pages in the PDF Output Tray	This text control displays the number of pages in the PDF file to which PDF conversions are appended. The PDF file can be deleted using the bin icon to the right of this text control.
Paper in Manual Feed	This button opens the folder in which client letterheads are stored, for Manual Feed operations. Client

letterheads are functionally similar to AutoDoc HSE letterheads, and can be specified on a first page ("Page 1") and subsequent page ("Page 2 and up") basis.
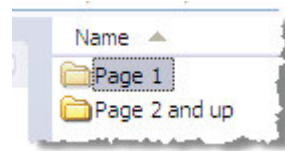
Paper in Front Tray	This button opens the folder in which client letterheads are stored, for Front Tray operations. Client letterheads are functionally similar to AutoDoc HSE letterheads, and can be specified on a first page ("Page 1") and subsequent page ("Page 2 and up") basis.
	Jobs directed from AutoDoc HSE for PDF conversion are typically front tray jobs (unless a different tray source is specified when printing to the AutoDoc HSE printer), and as such will have front tray letterheads applied.
Paper in Rear Tray	This button opens the folder in which client letterheads are stored, for Rear Tray operations. Client letterheads are functionally similar to AutoDoc HSE letterheads, and can be specified on a first page ("Page 1") and subsequent page ("Page 2 and up") basis.
Open Output Tray	This button opens the folder in which the PDF output resides. This button is only available if there are one or more pages in the output tray.
Open Output PDF	This button opens the PDF file to which PDF conversions are appended. This button is only available if there are one or more pages in the output tray.
Clear Output Tray	This button deletes the PDF file to which PDF conversions are appended, after prompting to save a copy first. This button is only available if there are one or more pages in the output tray.
Action after creating PDF	This group of radio buttons determines whether the output PDF is viewed after output has been created. The following options are available: ▪ *Leave in Output Tray* – no action is taken, and the user must subsequently initiate the viewing of the PDF if the results of the

conversion are to be seen.

- *Open the PDF* – the PDF file is opened automatically (the equivalent of clicking the *Open Output PDF* button). The PDF file is also automatically closed and reopened if further output is created while the user is viewing the PDF.

- *Save / Fax / Print dialog* – on printing, the user will be prompted with a number of options to determine what should be done with the resultant PDF. A single action can be chosen, or multiple actions:
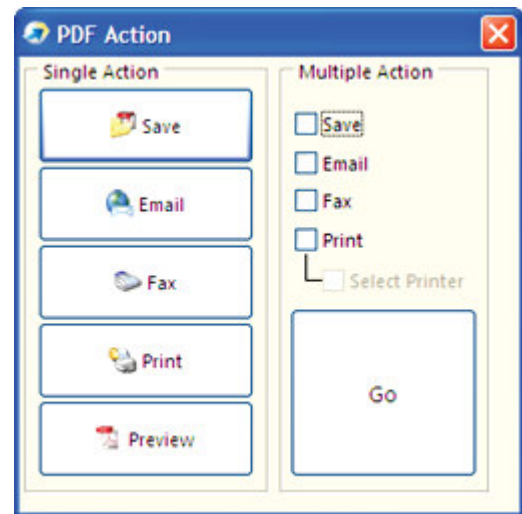
Note that if the multiple action *Print* checkbox is selected, and the *Select Printer* checkbox is left cleared, the print job is sent to the *Default printer for dialog* as specified in the Setup area of the client viewer.

Tray (Virtual Paper)	This column lists the available 'virtual trays' in the PDF printer, which facilitates the addition of letterheads to a print job. Double clicking on a row in the grid opens up the folder for that tray, from which the folders for page 1 and pages 2 and up are accessible.
Page 1 (Virtual Paper)	This column lists the virtual paper that will applied to the first page of print jobs directed to the client viewer PDF printer. Double clicking on a row in the grid opens up the folder for that tray, from which the folders for page 1 and pages 2 and up are accessible.
Page 2 and up (Virtual	This column lists the virtual paper that will applied to

Paper)	the second and following pages of print jobs directed to the client viewer PDF printer. Double clicking on a row in the grid opens up the folder for that tray, from which the folders for page 1 and pages 2 and up are accessible.

PDF Scanner

The PDF scanner provides two main functions:

- simple functionality to convert images (either from a hard drive location, or imported from a digital device) to PDF documents, without performing any actual delivery, and

- conversion of images to PDF, followed by delivery of the PDF using an AutoDoc HSE form.

!

Note that the PDF Scanner functionality is only available if the "Run as another User Service" functionality has been activated in the General tab of the global setup area (see page 18 for more details on this function).
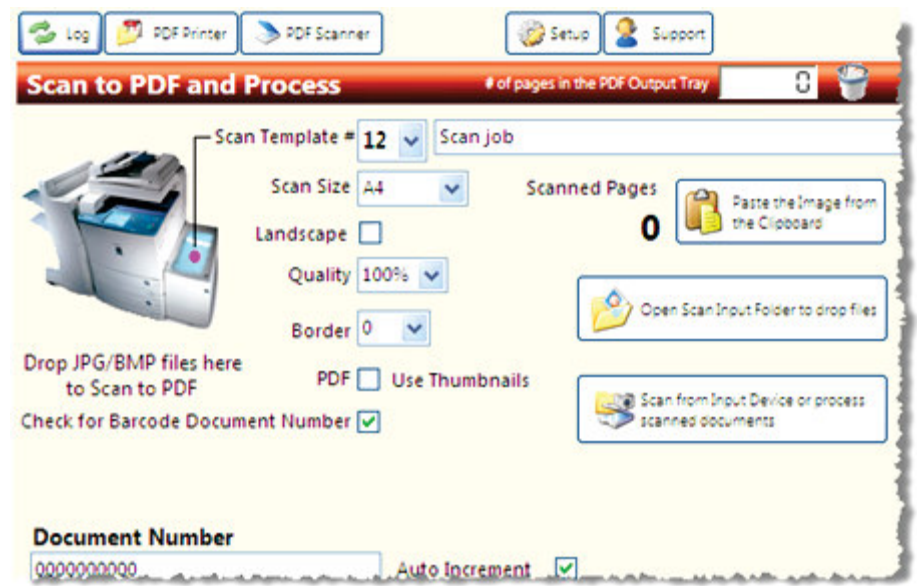
Under the simple scan function, images are placed in the scanner's 'input tray' (which is actually just a file folder in AutoDoc HSE's directory structure), and when the scan is initiated, a PDF conversion of the image is appended to the client viewer's output tray PDF file.

There are a variety of ways in which image files can be added to the scanner's 'input tray':

- the PDF scanner can connect to a digital device, such as a camera or physical scanner, to retrieve images to convert to PDF

- images can be 'dragged and dropped' directly onto the scanner (that is, the picture of the scanner in the PDF Scanner view)

- images can be pasted from the clipboard (for example, a screen capture can be pasted)

- the scan input folder can be opened to allow the image to be placed in the folder

The form-based delivery of an image-to-PDF scan is more complex, and requires extra configuration. This extra configuration is best understood by first considering the following diagram, which depicts the process of scanning an image, from the scanner's point of view:
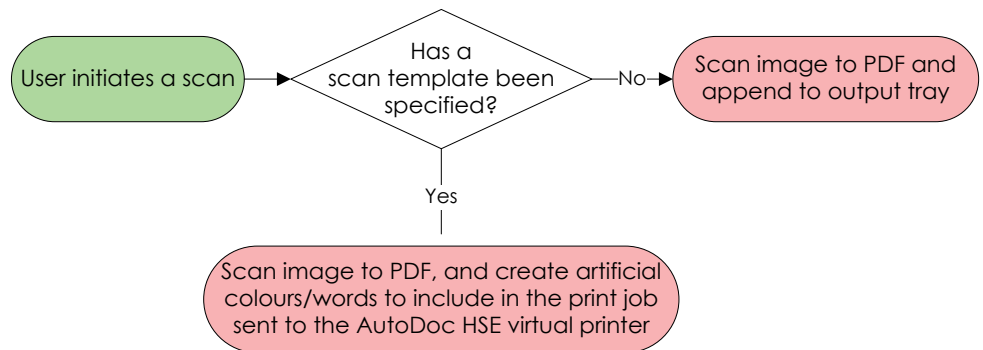
FIGURE 24 – How the PDF Scanner processes a scan job. The factor which decides whether an image should simply be appended to the output tray, or whether it should be delivered using an AutoDoc HSE form, is whether or not a scan template number has been specified.
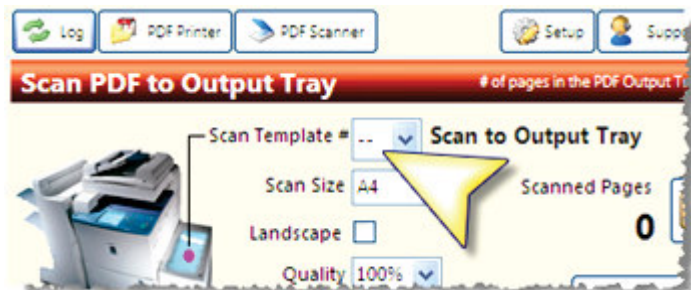
FIGURE 25 – showing a scan template entry of "--", which designates that no scan template should be used. This results in the scan being appended to the output tray.

Since textual commands and variables are generally not able to be incorporated in images, the PDF scanner generates some artificial coloured text information which is passed to the AutoDoc HSE virtual printer. This created information is based on

the scan template settings and the username of the user who submitted the scan job, and is created in the following manner:

- The user's Windows username is incorporated into a text string of colour RGB 2,4,6 in the following format: `SCAN-{username}-{scan template no.}`

- The scan template number is again incorporated into a second text string of colour RGB 8,10,12 in the following format: `SCAN-{scan template no.}`

- A document ID is produced as a text string of colour RGB 14,16,18. By default the document number auto-increments and is maintained separately for each scan template number. That is, if 5 scans have been produced under scan template 30, the next scan under that template would be produced with the document ID 0000000006, but a subsequent scan under template 25, which had not been used before, would be produced with the document ID 0000000001.

- The name of the scan template is produced in colour RGB 20,22,24.

Figure 26 demonstrates how a scan configuration is rendered into artificial coloured text information which is recognised by the AutoDoc HSE virtual printer.

Since AutoDoc HSE can 'see' what scan template a scanned image was processed with, it can potentially apply some template-specific delivery methods to the scan job. This can be achieved by mapping scan templates to an AutoDoc HSE form number via an AutoDoc HSE translation (see page 88 for more information on translations). Figure 27 depicts a translation configuration used to ensure AutoDoc HSE emails any scans produced under scan template 12 to a specific e-mail address, using a specific form number.

Note also that AutoDoc HSE facilitates barcode and OCR scanning through the AutoDoc HSE application (rather than the client); for more details see the sections beginning on pages 224 and 227.
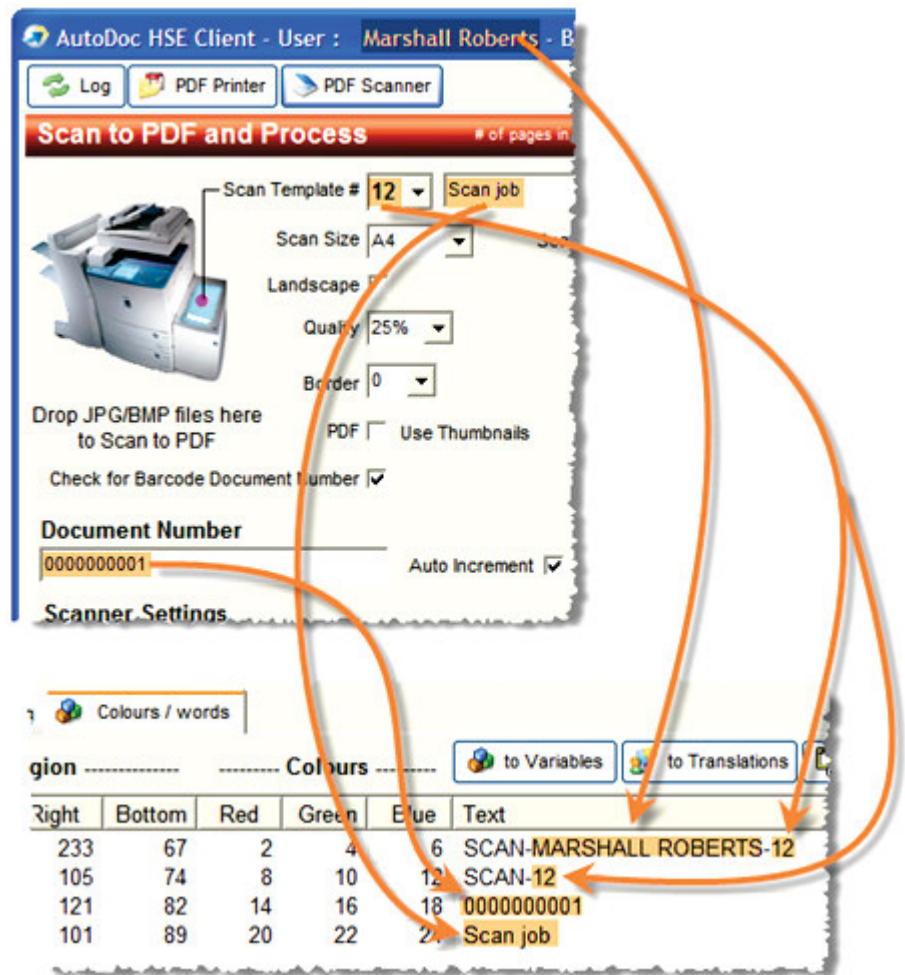
FIGURE 26 – Showing the 4 parameters that are artificially constructed by the PDF Scanner to allow AutoDoc HSE to 'see' information about the scan job. The top image shows the PDF Scanner view of the client viewer, while the bottom image shows the text strings found by the AutoDoc HSE virtual printer, as displayed in the 'Colours/words' tab of the AutoDoc HSE administration console's log. Note that these text strings were not genuinely present in the image which was scanned, but rather, the PDF Scanner created them for use by AutoDoc HSE, based on information about the scan job.

FIGURE 27 – Depicting two translations (the last two) used to deliver a PDF Scanner job to a graphic designer's e-mail address, using form 52. Note that these two translations would only work for scan jobs which were produced using scan template 12, and only for the user Marshall Roberts. A user-non-specific translation could be achieved by using the second artificial scan parameter (RGB 8,10,12), which does not include the username.

The following table provides detail for each of the controls in the PDF Scanner view:

Control Name	Control Description
# of pages in the PDF Output Tray	This text control displays the number of pages in the PDF file to which PDF conversions are appended. The PDF file can be deleted using the bin icon to the right of this text control.
Scan Template #	This drop down control is used to specify a scan template to be used to allow the resultant PDF to be delivered via an AutoDoc HSE form. If delivery is not required, the "--" entry should be selected, in which case the PDF will be appended to the client viewer's output tray. If a scan template number is specified, the number is passed to AutoDoc HSE as a coloured string. See page 188 for more information on delivering scan jobs.
Scan Template # (text control)	This text control is used to give a name to the scan template. If a scan template number is specified, the template name is passed to AutoDoc HSE as a coloured string. See page 188 for more information on delivering scan jobs.
Scan Size	This drop down list is used to specify the paper size to be used when processing the image. For example, selecting A3 will result in the image being scaled to an A3 PDF. Scaling is determined by the horizontal width of the specified size. For example, if an image is 75% of the width of an A3 page, the image will be scaled 75%, both horizontally and vertically.
Landscape	Use this checkbox to specify the orientation of the page.
Quality	Use this drop down list to specify the quality of the PDF output file (which will dramatically affect file size).
Border	Use this text control to specify a border width to be applied to the PDF output.

PDF Use Thumbnails	Use this checkbox to specify that the PDF output file should include thumbnail navigation images for each page.
Document Number	This text control specifies the document ID which will be passed to the AutoDoc HSE virtual printer if the scan is processed using a scan template.
Auto Increment	This checkbox specifies whether the value in the *Document Number* text control will auto-increment as scans are processed. The default setting is for document numbers to auto increment.
Show User Interface	This checkbox is used to specify that when importing images from a connected digital device (such as a camera or physical scanner), the device's software interface should be displayed on screen. This may facilitate, for example, selection of images to be imported (from a camera), or quality settings to be applied (for a physical scanner).
Use Scanner Auto Feed	This checkbox is used to specify that when importing images from a scanner, the scanner's autofeed option should be applied. Your digital device may not have this option, in which case the checkbox should be cleared.
Paste the Image from the Clipboard	This button pastes an image file which has been copied to the clipboard, into the scan input folder.
Open Scan Input Folder to drop files	This button opens the folder from which image scanning can be performed. Note that dragging and dropping a file here (without specifically copying) may move your file rather than copy it.
Scan from Input Device or process scanned documents	This button starts the scanning process. Files located in the Scan Input Folder are processed. If no files are located in the Scan Input Folder, a digital device attached to the PC on which the client is running can be scanned.

Setup

The Setup view allows user-specific settings to be created for an AutoDoc HSE MAPI configuration, as well as user-specific printers.

User-specific printers can be specified in two areas:

- in the AutoDoc HSE console, in the Users tab of the global setup area, and

- in the Setup view of the client viewer.

If any AutoDoc HSE job requires direction to a user printer, the following hierarchy applies:
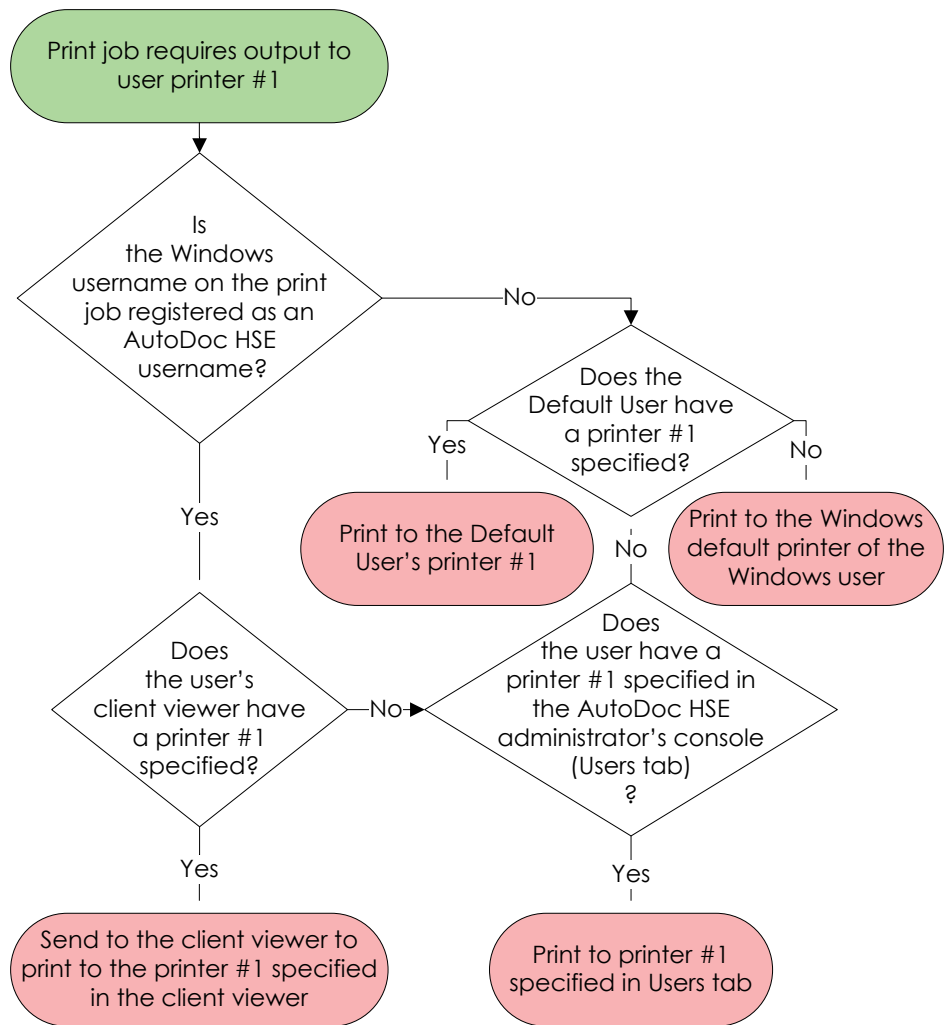
FIGURE 28 - depicting the process applied to a print job that involves a user printer.

The following table provides detail for each of the controls in the Setup view:

Control Name	Control Description
Setup	This title bar also locks the MAPI setup controls. Double click the bar to toggle the lock-state of the MAPI setup controls.
MAPI Profile name	This drop down control allows a MAPI profile name to be specified. Some installations may require a name to be specified. This control is disabled if the *Setup* bar toggle lock is applied.
Password	This text control allows a password to be specified for

	the MAPI profile. Some installations may require a password. This control is disabled if the *Setup* bar toggle lock is applied.
Test Login	This button tests whether the client viewer can communicate with the MAPI messaging service. If the test is unsuccessful, you may need to specify a profile name and password, or change the *Profile Required* and/or *New Session Required* checkbox settings. This control is disabled if the *Setup* bar toggle lock is applied.
Profile Required	This checkbox specifies that MAPI service requires profile credentials. Some installations may require profile credentials. This control is disabled if the *Setup* bar toggle lock is applied.
New Session Required	This checkbox specifies that a new MAPI session is required. Some installations may require a new session. This control is disabled if the *Setup* bar toggle lock is applied.
Process new (on hold) E-Mail	This group of option buttons specifies how MAPI emails should be queued/processed, when the emails have been generated under an AutoDoc HSE form which has the *Send MAPI E-Mail immediately* checkbox (in the E-Mail/SMS tab of the form template setup area) cleared. The following options are available: • *Place E-Mail in Outbox* – specifies that the user must manually send the e-mail from the user's outbox. • *Open E-Mail in a New Window* – specifies that the e-mail will be opened in the 'compose' state, with settings taken from the relevant AutoDoc HSE e-mail settings. • *Send E-Mail directly* – specifies that the e-mail will be placed in the outbox and a send event will be triggered.
User Printers #1-#4	These drop down controls are used to specify default printers for the user, to which AutoDoc HSE can direct

jobs.

Partial printer names can be specified here. For example, if the name `HP Laserjet II` is specified, when AutoDoc HSE directs a job to the user printer, an exact match is attempted first, and failing this, a partial match will be attempted. In the partial matching process, a job for `HP Laserjet II` could be routed to the printer known as `HP Laserjet II in session 4`.

Trays	This group of drop-down lists is used to specify output trays for the associated printers, and also includes set portrait and landscape options..
Label Printer	This drop down list is used to select the label writer printer to be used when using label writer features available in the XML Archive function.
Default printer for dialog	Use this drop-down control to specify the printer which will be selected by default when the client viewer's PDF Printer *Action after creating the PDF* setting is set to "Save / Fax / E-mail / Print dialog".

But wait, there's more...

AutoDoc HSE's flexibility facilitates some very handy configurations that can value-add even further to your IT infrastructure, straight 'out of the box'. Where our customers have found that AutoDoc HSE doesn't do something they'd hoped it would, we do our best to *add* that feature to the box. Read on for some simple but useful configurations, as well as some advanced features.

This chapter details the following:

- PCL commands and variables

- Strongly-typing variables

- XML-type output

- Mailback PDF converter

- Database integration

- MP3 e-mail attachments

- Template printing for labels

- Command line mail merging

- Remote printing to AutoDoc HSE

- Barcodes

- Optical Character Recognition (OCR)

PCL commands and variables

Commands and variables are also supported for PCL printing (but note that PCL printing is not available in the Lite edition). Rather than using font colour to define commands and variables, in a PCL job you can define a command or variable in the source document itself. This is achieved using a "PCL command character" (which you can choose as part of configuring AutoDoc HSE) as well as an alphabetical representation of variable numbers.

For example, if you wished to specify that a job should be processed under form 5, in French, and e-mailed to recipient@thisaddress.com, you could achieve this by placing the following text in the PCL source document:

```
&05|FR|recipient@thisaddress.com&
```

The ampersand (&) character in this example is the PCL command character, and is used to denote the start and end of a command group. The bar (|) character separates the individual commands. When this document is processed, the whole "command sentence" is handled using the treatment specified in the Variables tab of the Form Templates setup area (which includes such options as replacing commands and variables with spaces, for the printed output).

If a PCL job had an invoice number and an account name as follows:

```
Account name Joe Bloggs invoice no 345
```

...this could be treated as variables by modifying the text of the source document as follows (red text shows the modification, but is only red for clarity):

```
Account name&AJoe Bloggs&invoice no&B345&
```

Once again, the PCL command character (in this example, an ampersand) is used to denote the start and end of the variable, and the alpha characters A and B are the first and second letters of the alphabet, therefore equating to, respectively, variable 1 and variable 2. So, in the example above, the PCL job would be processed and variable 1 would be filled with "Joe Bloggs" and variable two would be filled with "345". The command character and the alphabet letter would be replaced by spaces in the final printed output, assuming that was the treatment specified in the Variables tab.

Strongly-typing variables

AutoDoc HSE variables, by default, are simple 'containers' which will hold any text string assigned to them. For some applications (such as populating an XML template), a more robust approach may be required. AutoDoc HSE caters for such applications by allowing variables to be defined as a more strongly-typed entity, facilitating such cases as the requirement for a number, date, or currency value.

When variables are more strongly-typed, if the RGB-encoded text for a particular XML item does not match the validation specified, the item is excluded from the XML output. If a detail-level variable does not meet validation, the *entire* detail level *item* is treated as invalid and is excluded from the XML output.

This functionality is achieved using variable type suffixes. The available suffixes are:

- $a – designates a mandatory item. For example, consider a simple XML template:

```
<xml>
    <headerSection>
            <doctype>%text%</doctype>
    </headerSection>
    <detailSection>
            <item>
                    <lineItemName>%name%</lineItemName>
                    <lineItemDesc>%desc%</lineItemDesc>
            </item>
    </detailSection>
</xml>
```

  If the %desc% variable (in red above for the sake of clarity) was defined as mandatory, and was not present in a print job, then the entire <item> would be excluded from the output.

- $n – as for $a, and also the value must be numeric, and an integer (no decimals allowed).

- $g – as for $n, but can be a decimal, and the value must also be positive.

- $f – as for $a, but a float data type (positive or negative number, decimals allowed), mandatory.

- $c – as for $a, and also converts the value to a currency with a decimal point. The source value can include currency symbols such ($ € USD EUR AUD AUD$) and excludes the currency symbol from the output. Note that if the currency fails validation, the value will be output as zero.

- $l – designates a multiline variable. For example, if a variable %addresslines%$l is defined as RGB 8,8,8 and there is more than one instance of text in RGB 8,8,8, AutoDoc HSE will combine the strings into one value for %addresslines%. Carriage return/Line feed is added between the merged strings.

- $s – as for $l, but adds a space between merged strings.

- $b – as for $l, but adds <br> between merged strings.

- $d – a date, with a wide variety of possible formats:

    - numbers and letters are acceptable

    - date components can be separated by dots, slashes, dashes, spaces, commas, or not separated at all.

The format of the $d variable is specified in the General page of the Global Setup area. For example, setting DMY (day month year) as the date format would treat the following document dates as follows:

- 141296 becomes 1996-12-14 (if the YY component is 00 to 50, the full year is interpreted as having a starting year of 2000, while a YY component of 51-99 is interpreted as having a starting year of 1900. So 96 is interpreted as 1900+96 = 1996).

- 141210 becomes 2010-12-14

- 51210 becomes 2010-12-05

- 14121996 becomes 1996-12-14

- 14122096 becomes 2096-12-14

- 5122010 becomes 2010-12-05

- 14.12.96 becomes 1996-12-14

- 14/12/96 becomes 1996-12-14

- 14 12 96 becomes 1996-12-14

- 14-12-11 becomes 2011-12-14

- 14 dec 96 becomes 1996-12-14

- 14 dec 2010 becomes 2010-12-14

- 14 december 96 becomes 1996-12-14

- 14 december 2096 becomes 2096-12-14

- $pxxxyyy - uses the characters from position xxx to position yyy.

For example, if a number value was required for variable 1, to populate a numerical 'AccountNo' element in an XML file, this could be achieved by defining the variable as AccountNo$n

Field name	Red	Green	Blue	Left	Top	Right	Bottom	Attach	Header
AccountNo$n	1	1	1	0	0	0	0	✔	✔

To use only the first three digits of the Account Number, the variable could be defined as `AccountNo$n$p001003` (populate from values from position 001 to position 003)
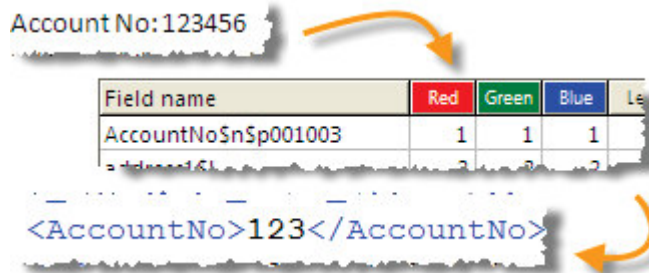
For more information on variables used to create barcode output, see the section starting at page 224.

XML-type file attachments
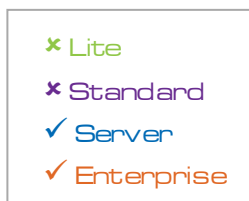
AutoDoc HSE can use variables to create genuine XML files, as well as XML-type files in other formats, which can be attached to an e-mail:
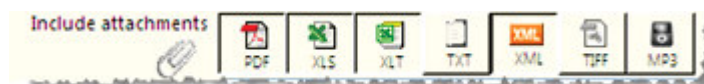
FIGURE 29 – E-mail attachment types available in the Form setup area. The XLS, XLT, TXT and XML formats can all leverage AutoDoc HSE's XML functionality.

The XML specification for AutoDoc HSE variables can also be used to facilitate AutoDoc HSE's mail-merge-like functionality; in this case the specified header and detail variables are used to populate an external template file, rather than dynamically creating an XML file 'on the fly'. See page 213 for more details on using an external template file.

Field name	Red	Green	Blue	Left	Top	Right	Bottom	Attach	Header
ContactName	3	3	3	0	0	0	0	✔	✔
CompanyName	2	2	2	0	0	0	0	✔	✔
Ordernumber	1	1	1	0	0	0	0	✔	✔
ArticleNumber	4	4	4	0	0	0	0	✔	
Description	5	5	5	0	0	0	0	✔	
Variable 006	6	6	6	0	0	0	0		

FIGURE 30 – Variables configured to be included as XML. All variables that are checked "Attach" will be included in an XML-output file or used to populate an external template; those marked as a "Header" will be treated as header information, while those not marked as Header will be treated as detail item information.

The XML output from the above configuration could appear as follows in the resultant XML file:

```
1    <?xml version="1.0" encoding="ISO-8859-1"?>
2    <Order>                                              ← Form name
3        <ContactName>John Smith</ContactName>
4        <CompanyName>AutoElectrics</CompanyName>
5        <Ordernumber>200</Ordernumber>                   ← Header items
6        <item>
7           <ArticleNumber>1234</ArticleNumber>
8           <Description>10A Fuses</Description>          ← Detail items
9        </item>
10       <item>
11          <ArticleNumber>1300</ArticleNumber>
12          <Description>Thermo fan relay</Description>
13       </item>
14   </Order>
```
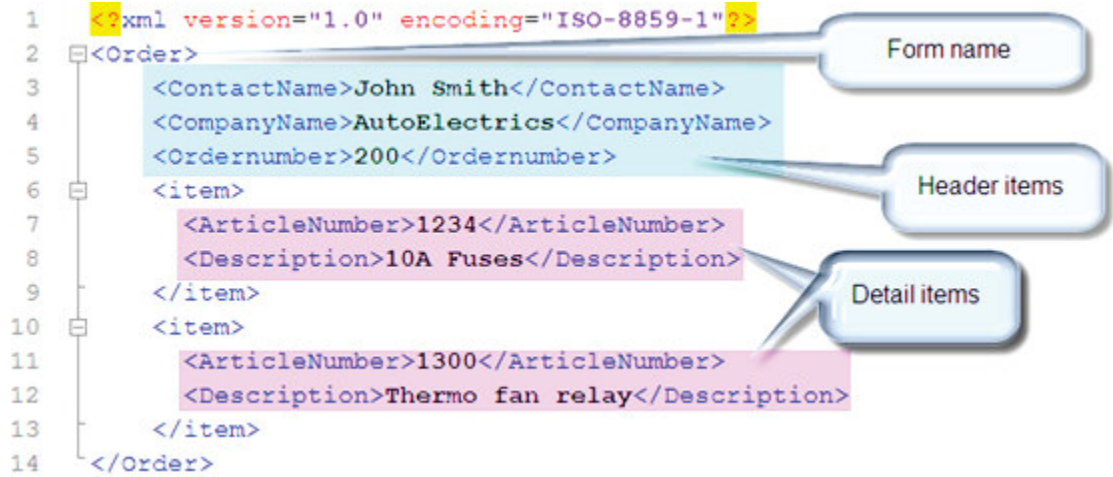
The same content delivered as a Microsoft Excel document would appear as follows:

	A	B	C	D	E	F
1	ContactName	CompanyName	Ordernumber	ArticleNumber	Description	
2	John Smith	AutoElectrics	200	1234	10A Fuses	
3	John Smith	AutoElectrics	200	1300	Thermo fan relay	
4						

Header columns   Detail columns

As a text file, the content would be delivered as follows:

```
  Order.txt

  1    ContactName CompanyName Ordernumber ArticleNumber    Description
  2    John Smith  AutoElectrics    200 1234     10A Fuses
  3    John Smith  AutoElectrics    200 1300     Thermo fan relay
  4
  5
```

FIGURE 31 - the same content delivered as a plain text file. The text file is created in tab-delimited format.

By default, without using an external XML template, AutoDoc HSE produces an XML file where the detail level variables are at a maximum of two levels deep in the XML hierarchy. To enable AutoDoc HSE to populate an XML template file (for example a recognised standard structure), the *Detail separator tag* field can be used to specify which element in the XML template equates to the <item></item> element in the default AutoDoc HSE structure (i.e. the element that will be repeated to contain the AutoDoc HSE detail level variables).

When using an external XML template file, if an element is populated by a variable which has no value, the element will not be included in the output. Similarly, if the resultant blank element renders that branch of the XML tree blank, the entire branch will be excluded from the output. For example, consider a simple XML template:

```xml
<xml>
    <headerSection>
            <doctype>%text%</doctype>
    </headerSection>
    <detailSection>
            <lineItem>%nothingHere%</lineItem>
    </detailSection>
</xml>
```

If the %nothingHere% variable is defined as a mandatory variable, and is not populated by the print job, all the red text in the above example would be excluded from the output.

Also refer to the section starting at page 213 for more details on how the XML variable specification will populate an external template file.

Creating a 'mailback' PDF converter

AutoDoc HSE has a PDF printer which can be used as a PDF converter (see the "PDF Printer" section starting on page 182).

✗ Lite
✗ Standard
✗ Server
✓ Enterprise

However, using AutoDoc HSE's ability to create extra printers, you could also create a separate 'mailback' PDF converter, which, upon receiving a print job, would convert the document to PDF and e-mail it back to you.

FIGURE 32 - a user creates a document, prints it with a mailback printer, which converts it to PDF and sends it via e-mail back to the user who printed the document.

To achieve this setup, you would perform the following steps:

1. Using AutoDoc HSE's global setup Print tab, create an additional shared printer (with a name that will be meaningful to your users):
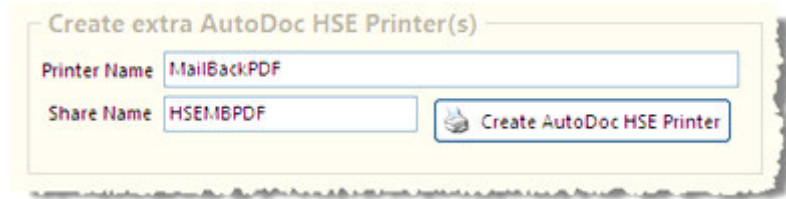
2. Using the Windows printer list, edit the printer's properties to add some indicators (see page 132 for an introduction to indicators). In this case, we would add indicators which are textual commands specified in the extra mailback printer's comments. For example, adding the text 23 to the comments of the mailback printer will instruct the printer to process the job under form 23. You can also add e-mail addresses and fax numbers (separated by a space character). System variables can also be used:
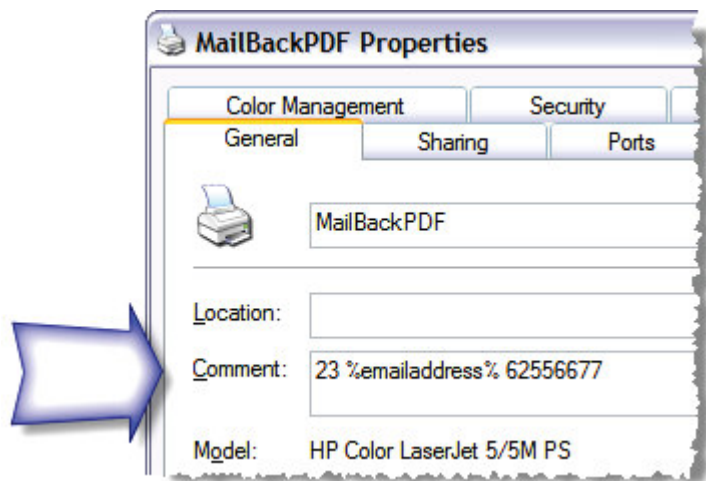
FIGURE 33 - an indicator in the mailback printer's *Comment* property. This indicator would instruct the printer to use AutoDoc HSE form 23 and send a fax to 62556677. Note also that an e-mail will be sent, since the user-specific system variable will be populated by the AutoDoc HSE user's e-mail address (as specified in the global setup Users tab). By using the %emailaddress% variable, which refers to the e-mail address of the person who created the e-mail, we have a means of sending the e-mail back to the creator, regardless of who the creator is.

3. If desired, you could configure form 23 with appropriate information for a mailback function. It is important that the e-mail should be sent under the CREATOR/OWNER option, to ensure the e-mail address of the creator is used in the %emailaddress% indicator (see Figure 34 on page 205).

Provided that the users printing to the AutoDoc HSE mailback printer have already been configured as AutoDoc HSE users, mailback setup is complete. Upon printing to the mailback printer, users would receive an e-mail like the one

below, and a fax would be sent to 62556677. If such a 'hard coded' fax number was not required, the fax number indicator would not be added, or alternatively, the %faxnumber% variable could be used.
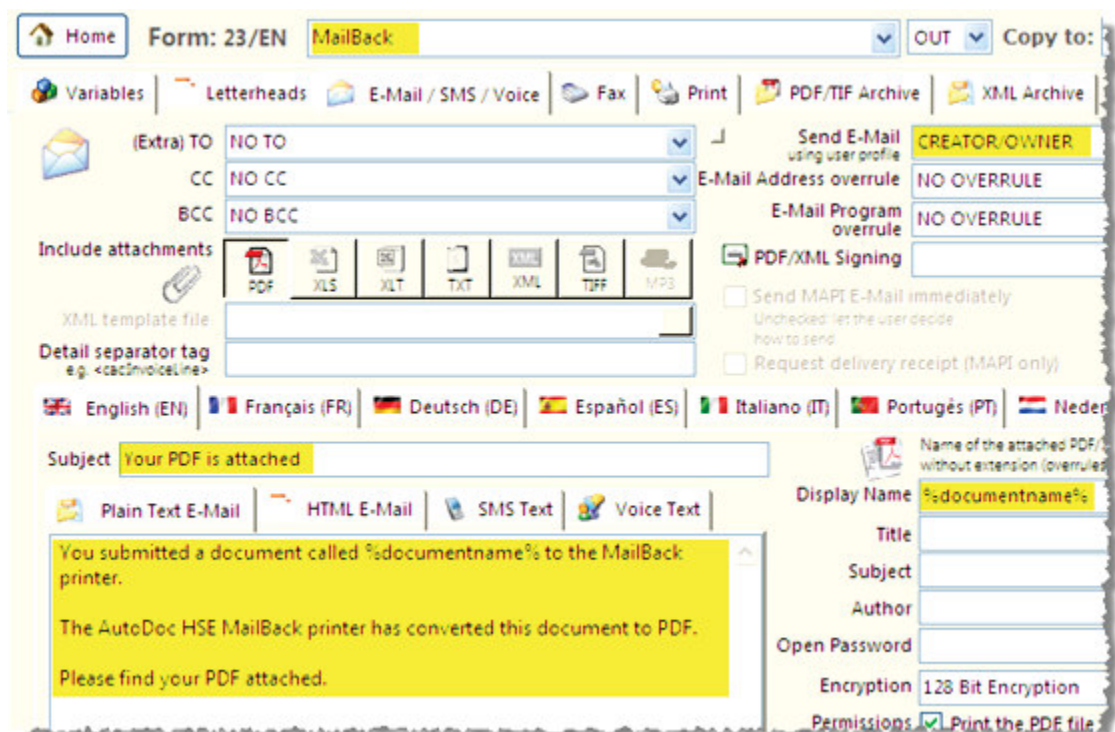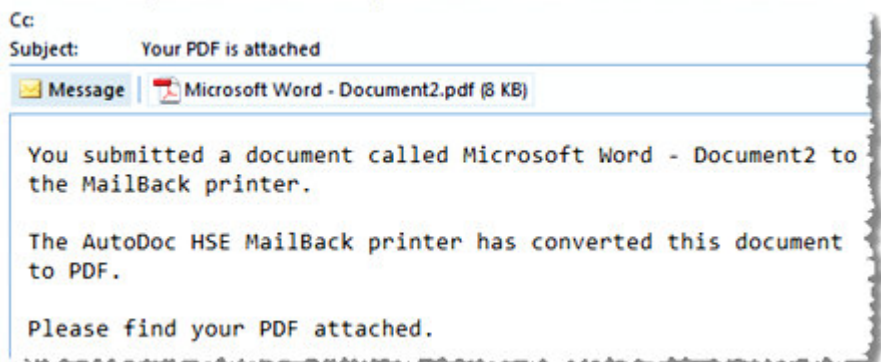
FIGURE 34 – showing areas of the E-mail / SMS / Voice tab that have been configured especially for a mailback situation.

Note that, regardless of your version of AutoDoc HSE, you can add indicators to any AutoDoc HSE virtual printer. This means you can add a mailback (and faxback) function to your AutoDoc HSE printer (even if you only have one), if it suits your purposes to have a copy of all outgoing e-mail/fax deliveries sent to the

creator. For the purposes of a dedicated PDF converter (with no delivery), the example above used a *separate* AutoDoc HSE printer.

Database integration

✗ Lite
✗ Standard
✓ Server
✓ Enterprise

AutoDoc HSE can query a third party database to retrieve additional information which may not be available from the print job itself.

For example, a document you need to print from an accounting application may have the customer's account number on it, but not the customer's postal address, which you'd like to be able to reference within the AutoDoc HSE form responsible for handling that type of document.

One solution could be to modify the report that the accounting software uses to create that document. By including the postal address in the report in 'coloured' text, you could then capture it as an AutoDoc HSE variable.

Database integration gives another, more powerful solution. Using this approach, you could instruct AutoDoc HSE to query the software package's database to find the postal address associated with the account number included on the print job, rather than modifying the report. This approach is referred to as an AutoDoc HSE 'reverse lookup query'.

To make use of this feature, the following areas need to be configured:

▪ The *Database* tab of the Global setup area (accepts/builds a connection string to an ODBC data source).

▪ The *Reverse lookup query* sub-tab within the *Variables* tab of the Form Templates setup area.

Using the example above, the reverse lookup query solution could be implemented as follows.
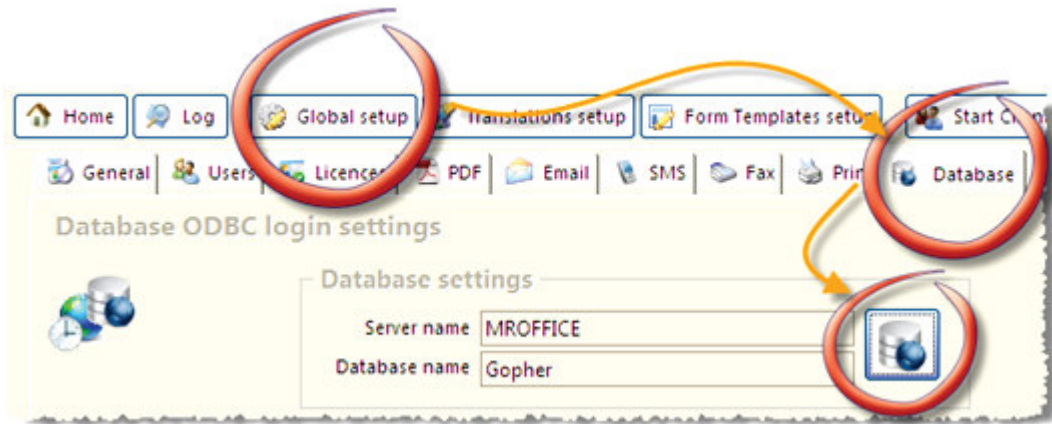
FIGURE 35 – Specifying the database on which the reverse lookup query should be performed. The button with the database icon facilitates the specification of a connection string to be used by AutoDoc HSE to access the database.

Assuming the account number for a customer is already captured as the variable %accountnumber%, the reverse lookup query to obtain the customer's address details could be coded as follows:

```
SELECT * FROM ADDRESSES where EntityID = %accountnumber%
```
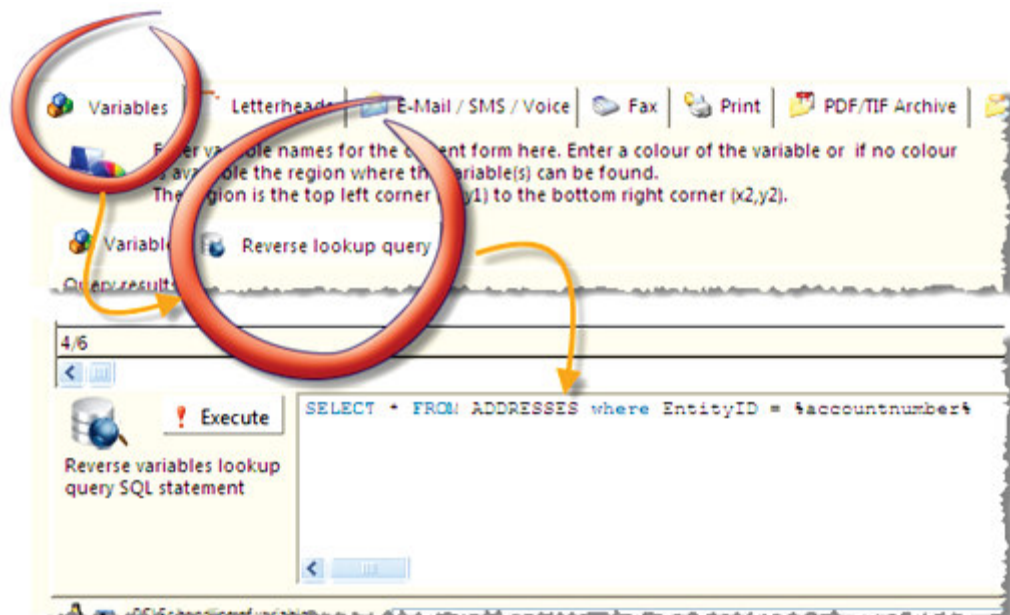

FIGURE 36 - The query as seen in the *Reverse lookup query* sub-tab of the *Variables* tab.

By temporarily replacing the %accountnumber% variable with a fixed value, and using the *Execute* button, the data that will be available to AutoDoc HSE through this query can be tested, and is displayed on-screen:
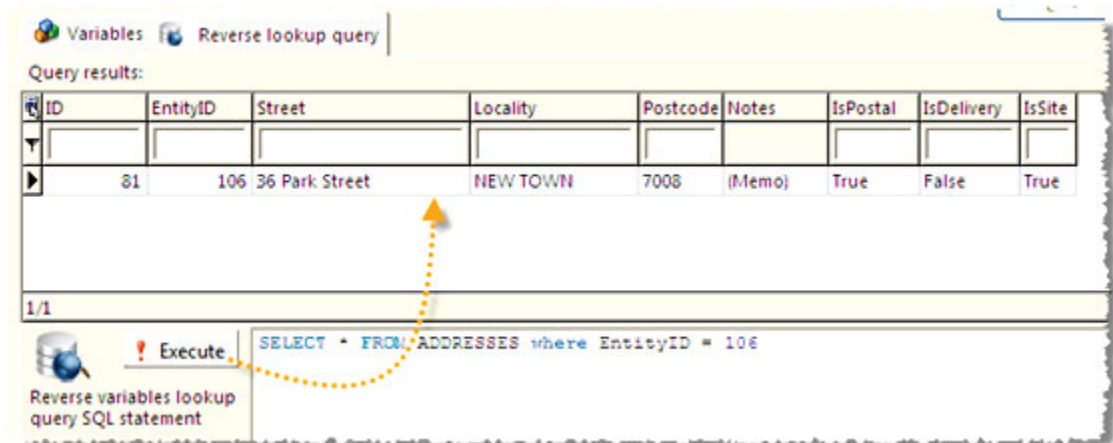
FIGURE 37 – Showing the results of query with a temporarily hard-coded EntityID value. The database fields such as 'Street', 'Locality', and 'Postcode' are now available to AutoDoc HSE.

To capture the address details associated with an account number, after reinstating the %accountnumber% variable into the query, the address details can be defined as variables on the *Variables* tab:
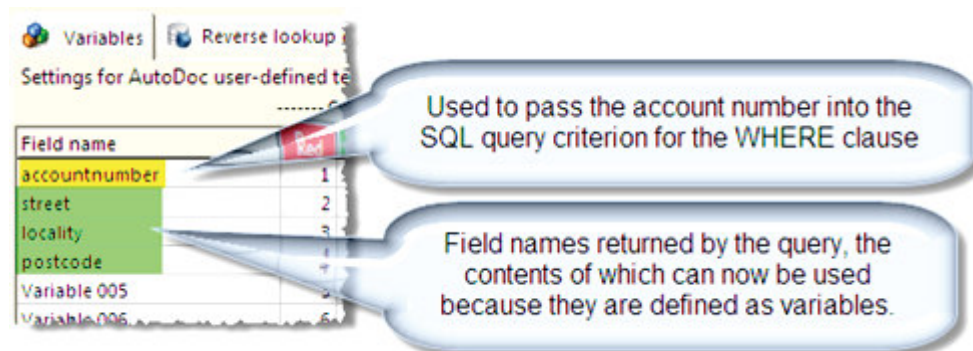
FIGURE 38 – The yellow variable serves as input for the query – feeding the account number from the print job into the query – while the green-highlighted variables capture the output results from the database field names of the same name. Note that since the output variables are sourced from the database query, the colour/region definitions for these do not apply.

Database-specific command variables

If a form is configured with a reverse lookup query, AutoDoc HSE automatically looks for special variables that can be utilised with database queries. These variables are, by their variable nature, variables, but actually function as AutoDoc HSE commands.

Database name

The database name variable `%dbname%` provides even further flexibility in the reverse lookup function. Using this variable, the database to be interrogated can be specified as part of the source document content. For example, an AutoDoc HSE invoice form could have the variable %dbname% configured to look for text in RGB 254, 254, 254, which could then be used to create the connection string in the Global Setup area:
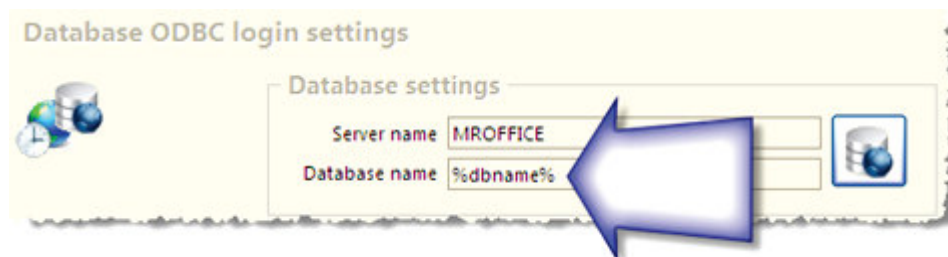
The more likely scenario would be that, rather than using colour-coded document content to specify the database name, this would be specified as the default variable value for the form, and again would be used to create the connection string:

Field name	Red	Green	Blue	Left	Top	Right	Bottom	Attach	Header	Default value
accountnumber	1	1	1	0	0	0	0			
street	2	2	2	0	0	0	0			
locality	3	3	3	0	0	0	0			
postcode	4	4	4	0	0	0	0			
dbname	5	5	5	0	0	0	0			ExonetDB
Variable 006	6	6	6	0	0	0	0			

Post-processing database command variables

For reverse lookup queries, AutoDoc HSE also looks for post-processing command variables. Command variables can hold variable information, but are processed as AutoDoc HSE commands. For example, the command variable `%email%` results in an email being sent to the email address held by the `%email%` variable.

Because these are reserved, pre-defined system variables, these need not be defined in the *Variables* tab. If the reverse lookup query returns field names of the same name as these predefined variable commands, the returned values for those fields will be processed as commands. In many cases, this may require the use of aliases in your SQL SELECT statement.

For example, to use the predefined system variable `%email%` to send an email, the SQL query could be as follows:

```
SELECT Description AS email

FROM dbo.ElectronicContacts

WHERE EntityID=%customerid%
```

The alias 'AS email' ensures that the email address is returned with a field name that corresponds to the AutoDoc HSE predefined system variable name.

The list of reverse lookup command variables is:

- %language% - specifies the language to be applied, as for the language tabs in the Form templates setup area.

- %email% / %sms% / %fax% - specifies the address/number to which the document should be delivered using these standard delivery method.

- %extra1% through to %extra9% - specifies any basic AutoDoc HSE command (e.g. if %extra1% is returned as info@streamlinesoftware.net, an email will be sent to that address)

- %attach1% through to %attach9% - specifies filenames of extra attachments to be delivered to outgoing emails.

- %attachblob1% through to %attachblob9% - used exclusively in conjunction with a corresponding %attach<1-9>% variable command to retrieve the contents of a BLOB data type field, which then becomes the content of the email attachment. See Figure 39 below for an example of this usage.

- %append1% through to %append9% - specifies filenames of documents to be appended to outgoing email PDF files.

- %appendblob1% through to %appendblob9% - used exclusively in conjunction with a corresponding %append<1-9>% variable command to retrieve the contents of a BLOB data type field, which is then appended to the outgoing email PDF file. See Figure 39 below for an example of BLOB data type usage.

Where reverse lookup queries return multiple lines, each line is processed. For example, if the reverse lookup query returns multiple rows with values for %email%, emails will be sent to each of the addresses returned across those rows.
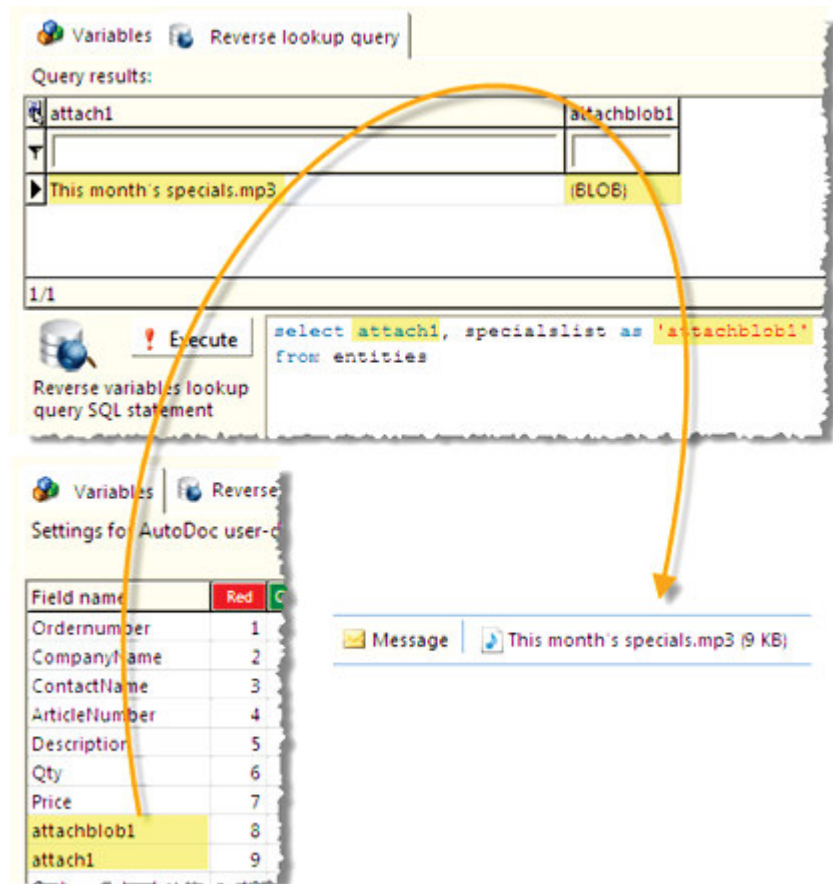
FIGURE 39 - Reverse lookup variable commands in action. In this example, %attach1% and %attachblob1% are initialised as variables on the Variables tab. Using a reverse lookup query, the variables are populated from a Microsoft SQL Server database – the database field 'attach1' contains the text value "This month's specials.mp3", and the field "attachblob1" is a BLOB data type, varbinary(MAX), which holds an MP3 file. On processing the job, AutoDoc HSE finds the attach1 variable command (which, if it were populated with a valid filename/path, would normally result in that file being attached to the outgoing e-mail) and checks for a corresponding attachblob1 command. Since, in this case, there is an attachblob1 command, the attach1 value is used as the file *name*, while the BLOB is used as the actual *file* that's attached. The end result is an MP3 file with the filename "This month's specials.mp3", attached to the outgoing e-mail.

Dynamic MP3 e-mail attachments

✘ Lite
✘ Standard
✔ Server
✔ Enterprise
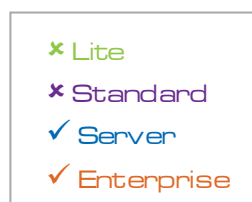
AutoDoc HSE has a built-in text-to-voice converter which can be used to attach a dynamically-created MP3 file to an outgoing email.

This feature is configured in the E-Mail / SMS / Voice tab of the Form Templates setup area.

For example, to deliver a spoken invoice, you could:

- Create a new form with a form name `Spoken invoice`

- On the E-Mail / SMS / Voice tab, turn the *MP3* attachment button on

- Specify `Invoice` as the e-mail subject heading

- Select your preferred voice (note that additional voices can be purchased from sites such as www.ivona.com)

- Specify the text that should be converted to speech.
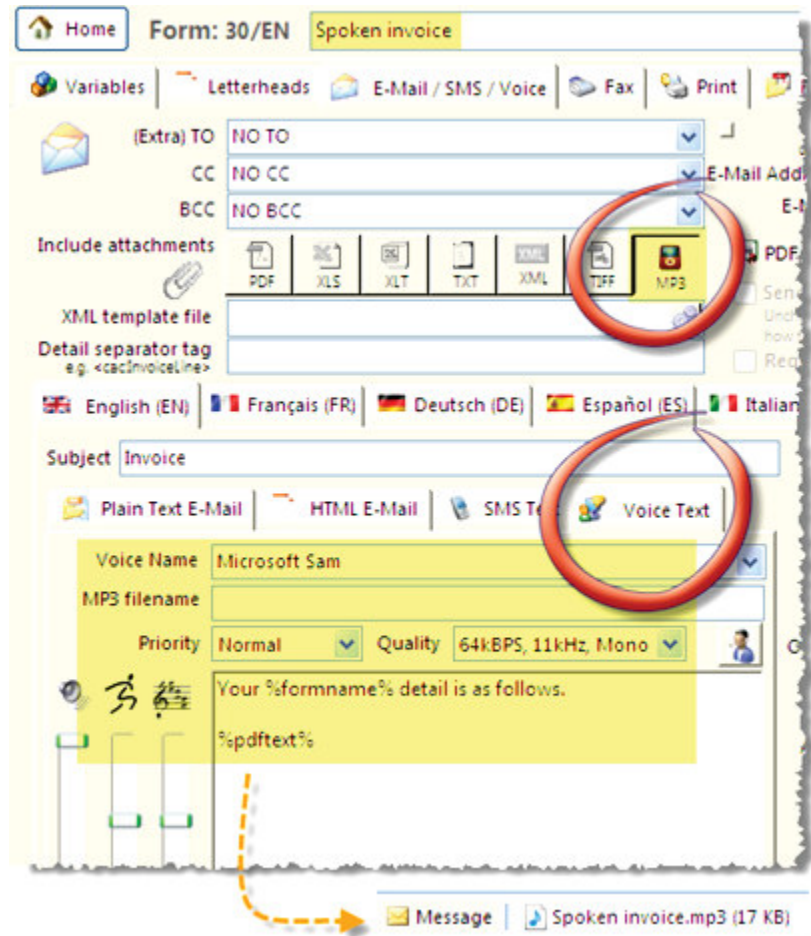
FIGURE 40 - *Sending a spoken invoice. The first sentence containing the %formname% variable will be spoken as "Your spoken invoice detail is as follows." The %pdftext% variable is populated with the entire textual content of the print job, and will also be converted to speech.*

MP3s are sampled at a default rate of 16Kbps, 11kHz, mono, which results in a very low 100 kB per minute of speech, enabling the generation of relatively small MP3 attachments. The quality is, however, variable.

Template printing for labels or e-mails

✘ Lite
✘ Standard
✔ Server
✔ Enterprise
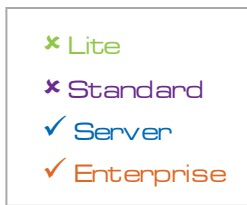
AutoDoc HSE offers a template-based printing feature, which operates using the 'mail merge' principle of producing multiple documents by repeatedly populating a single fixed template with variable data. The power of this feature can be harnessed for activities such as creating product or mailing labels, or to populate HTML emails for mail outs such as specials lists.
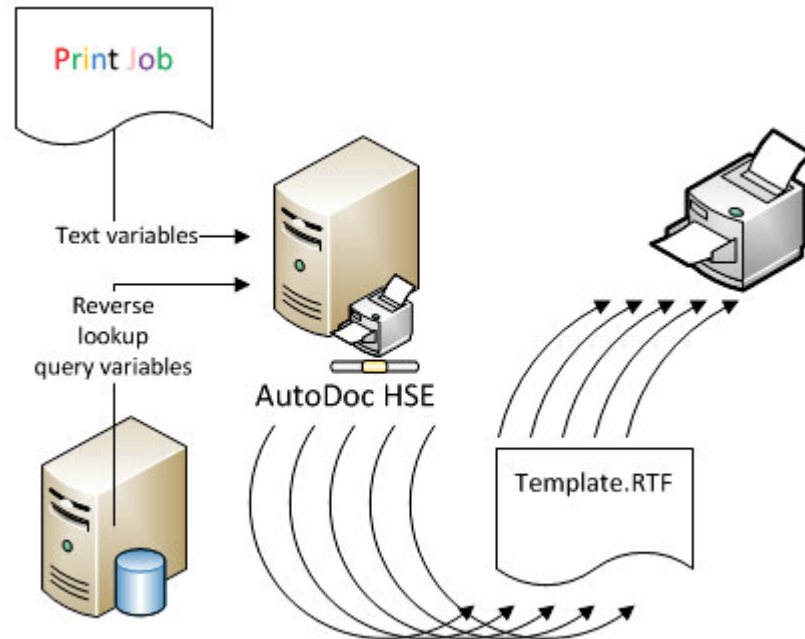
FIGURE 41 – Template printing with AutoDoc HSE's 'Print Extra Documents/Labels' feature. Variables, which can be 'mined' from the source document and/or an external database, are used by AutoDoc HSE to populate a pre-configured RTF template file.

For example, to print packing slips for orders stored in a database (see page 206 for more detail on configuring AutoDoc HSE to mine database data) through a template file, you could:

- Create an RTF file of a suitable layout, to be used as your template. Microsoft Word is a suitable RTF editor.

To ensure smooth operation with your RTF template file, open the template in a simple text editor such as Microsoft's Notepad and check that no variable names have been split; variable names must remain a contiguous text string if they are to be recognised by AutoDoc HSE.

To ensure the layout of your output is retained, in Microsoft Word, print the template document to the printer which will handle the final documents, using

any layout preferences you require, and then save the document. Margin and paper sizes settings will then be retained by the RTF file.

FIGURE 42 - A packing label template, created as an RTF file. Note that AutoDoc HSE variables are designated as usual, enclosed by percentage signs (%). Remember that, if using a reverse lookup query to populate variables with database data, variables must have the same name as the database field names.

- Based on the variables required for the template, specify and test the SQL query in the Reverse lookup query sub-tab of the Variables tab in the form setup area. This is the query that AutoDoc HSE will use to retrieve the dataset to use to populate the template.

- Add the returned database field names as correspondingly named variables on the Variables tab.

- Use the XML columns on the Variables tab to specify which variables should populate the template, and which of these are header items (see page 198 for more details).

- Specify the template file in the Print Extra Documents / labels sub-tab of the Print tab.
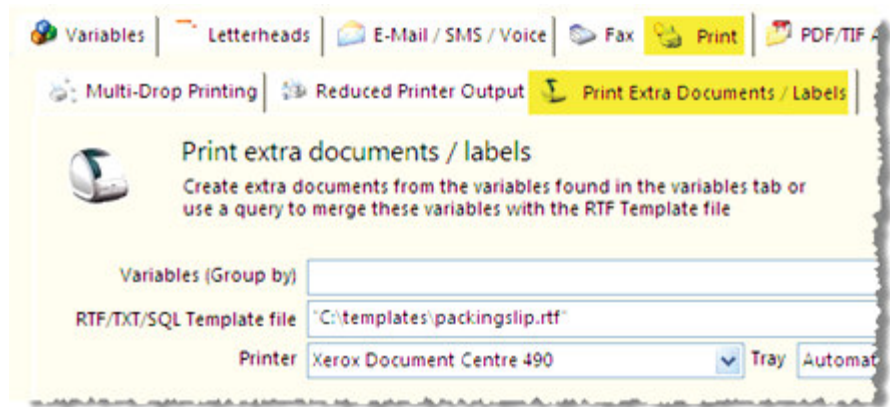
FIGURE 43 - specifying the template file

Note that when using an external template file, you can also use an external SQL file as the SELECT query via which the template will be populated. Instead of specifying the SELECT query on the Reverse lookup query sub-tab of the variables tab, you could use an external SQL file.

To use an external SQL file, create the SQL script and save it in the same location as the external template file. Using the example depicted in Figure 43 above, you would create and save the SQL script to this file:

```
C:\templates\packingslip.sql
```

When AutoDoc HSE processes an external template file, it looks for an accompanying SQL file. If an SQL file is found, it uses the external file and disregards any SQL query specified in the Reverse lookup query tab. If a SQL file is not found, AutoDoc HSE processes the script specified in the Reverse lookup query tab.

```
USE %dbname%
SELECT * FROM dbo.CustomerAssets
WHERE CustomerID = %customernumber%;
```

FIGURE 44 - a simple external SQL file

On processing a print job, under such a configuration, AutoDoc HSE will gather variables from the source document, gather variables from the external SQL file, or the specified reverse lookup query, and feed the variables into the external template file.

> AutoDoc HSE has no way of 'knowing' what your intended output would be for an external template file, since, for example, a SELECT statement could return only one instance of each variable that has been configured as a detail item, or multiple instances (i.e. one row or multiple rows). Similarly, an external template

file could contain placeholders for only one instance of each detail item, or multiple instances of each, and the number of multiple instances of each could differ from the number of multiple instances of those variables returned in the dataset.

It is therefore particularly critical that you test your configuration on a wide variety of possible outputs, before using this feature in a production environment.

As a guide, consider the following scenarios, assuming a form is configured for template printing of orders:

1. Since multiple documents will be produced in the one print job (a batch of orders), an appropriate header variable by which the documents can be grouped would be defined (e.g. %ordernumber%). The grouping is then specified in the Print extra documents / Labels tab:
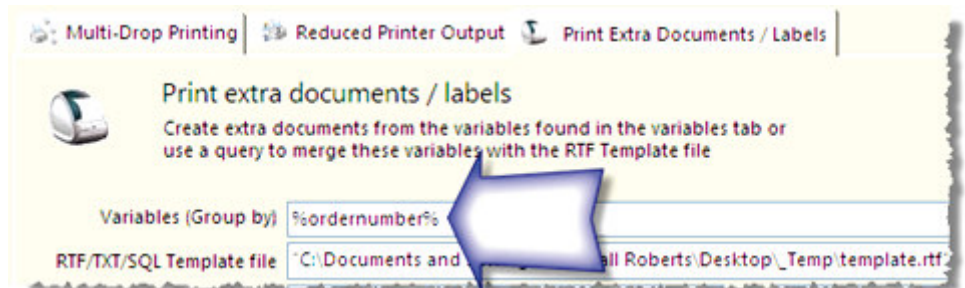
2. If the special command variable %copies% is defined and specified as an attached header item, the value of this variable will determine the number of copies that will be printed for each page. This variable will override the *Copies* value specified in the Print extra documents / Labels tab.

Settings for AutoDoc user-defined textual variables:

Field name	Red	Green	Blue	Left	Top	Right	Bottom	Attach	Header	Default value
Ordernumber	1	1	1	0	0	0	0	✔	✔	
CompanyName	2	2	2	0	0	0	0	✔	✔	
ContactName	3	3	3	0	0	0	0	✔	✔	
Price	7	7	7	0	0	0	0	✔	✔	
Copies	16	16	16	0	0	0	0	✔	✔	3
ArticleNumber	4	4	4	0	0	0	0	✔	☐	
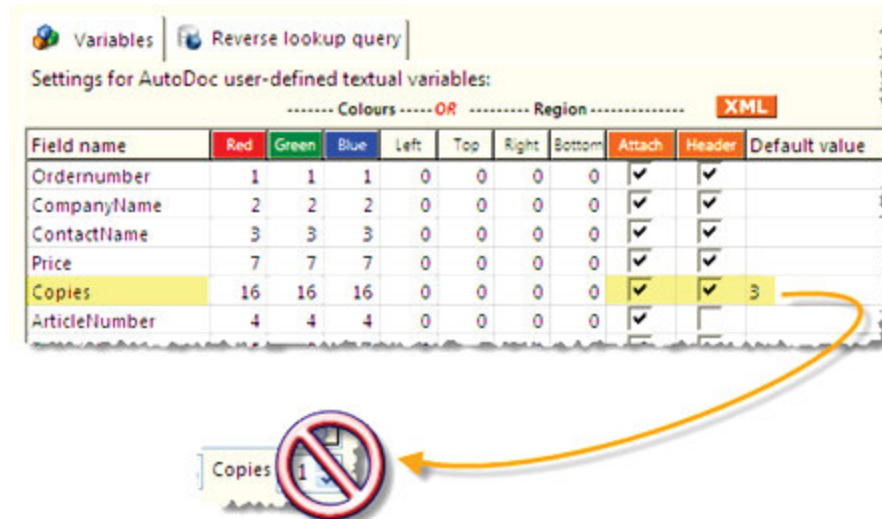
3. If a variable is returned from a SELECT query and the variable is marked for inclusion as an XML item, but does not feature in the template, that variable has no effect on the template population.

4. For a template which has a fixed number (multiple) of variables that have been specified as detail items...
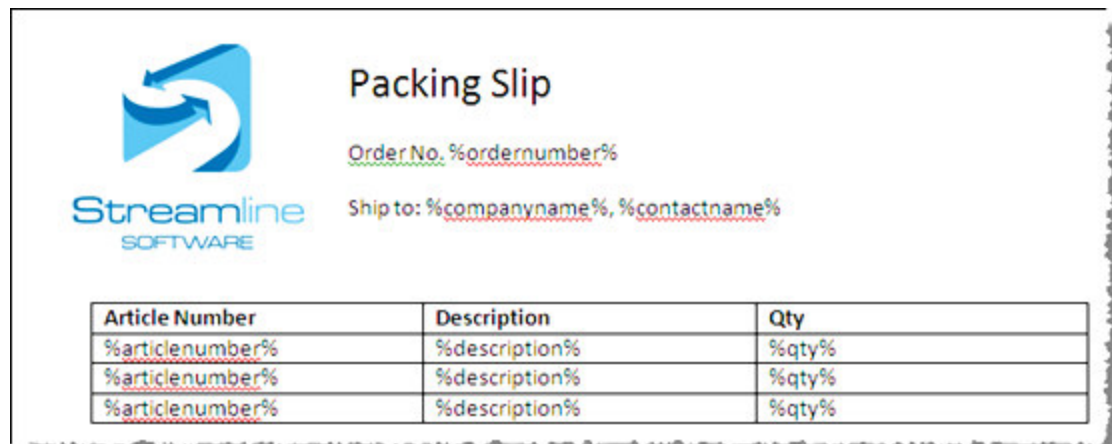
...the following occurs (using the example above which has three detail items):

- detail items will fill the table; as AutoDoc HSE encounters each variable, it will populate it with the first corresponding variable value. When it encounters another variable of the same name, it will populate that with the next available variable value.

- If more variables are specified in the template than are mined by the SELECT statement, the unpopulated variables are rendered as blanks. For example, if an order only has two items, the above template would output a packing slip with a blank third row in the detail grid.

- If the SELECT statement returns more rows than there are occurrences of a corresponding variable set in the template, the template will be filled to capacity, and then another page will be created to cater for the extra rows. For example, if an order has seven items, the above template which holds three detail lines, will be used to produce 3 pages: the first two holding 3 lines each, and the last will feature just one detail line, and the remaining two detail lines on that page would be blank.

5. For a template which only has header variables...
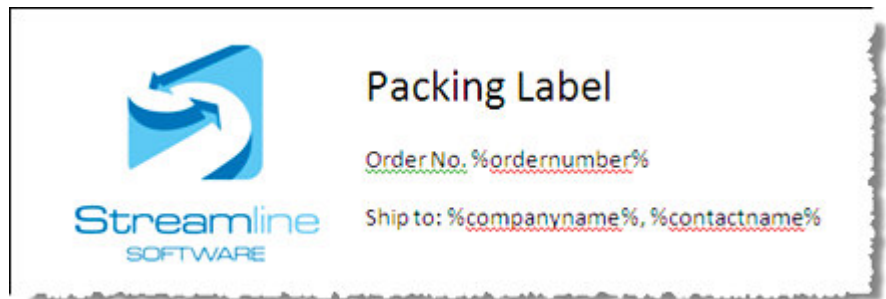
...the following occurs:

- Only one page will be printed for each order, regardless of how many detail items are on the order.

- The definition of detail variables in AutoDoc HSE will not affect the output of the template in the case where the template does not include detail variables.

6. For a template which only has detail variables...
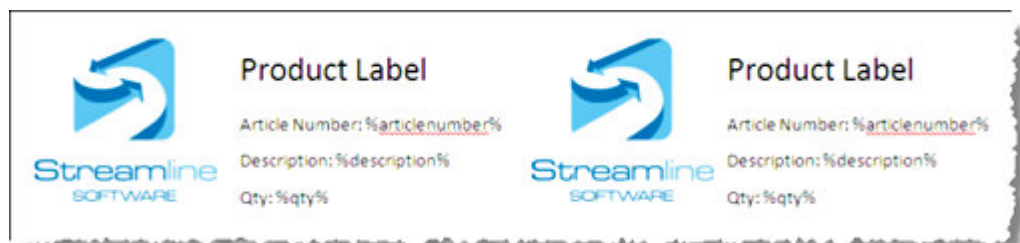
...the following occurs:

- Variables are populated until the page is full, and more pages will be created if more data has been sourced from the database. If fewer variables exist in the source data than in the template, the leftover variables in the template are rendered as blank.

- The specification of header variables has no effect when using a template that does not use header variables.

The final output of the template-printed documents is rendered as PCL, Postscript, or bitmap, depending on the printer (so, for example, if the resultant documents are printed to PDF, the text in those documents may be rendered as an image, rather than selectable text).

Command line mail merging

✗ Lite
✗ Standard
✓ Server
✓ Enterprise

In addition to invoking AutoDoc HSE via the usual process of printing to the shared AutoDoc HSE virtual printer, it is possible to invoke AutoDoc HSE through a command line instruction, to generate external template-based mail-merge functionality.

With the following files located in a location accessible to AutoDoc HSE, the application can be invoked to process the files:

1. a TXT file containing an ODBC connection string

2. a TXT (or SQL) file containing a SQL SELECT query

3. a RTF file containing a template

4. Optionally, a second RTF file that contains a template to be used for page two and above.

Referencing the numbered list above, the command line syntax is:

```
AutoDocHSE.exe <print job name> <path to 1> <path to 2> <path
to 3> {<path to 4>}
```

An example command line command is:

```
AutoDocHSE.exe Test d:\odbc.txt d:\sql.txt d:\template.rtf
```


FIGURE 45 - running a mail merge via the command line.

Unlike mail merging configured from within the AutoDoc HSE application, mail merging from a command line relies on the command line parameters, the ODBC connection string, SQL query, and template file, for dynamic configuration. As such, variables do not need to be defined within AutoDoc HSE in order to populate the template file. For example, if the SQL query returns a field called "JobNumber", the template will be populated by the value of that field, if `%jobnumber%` is included in the template – regardless of whether this variable is defined within AutoDoc HSE or not.

The command line functionality will further interpret the SQL-returned field names, looking for fields beginning with "h_" and "f_", which it will treat as header and footer items accordingly. Header items only appear on the first output page and footer items only appear on the last. For example, if a SQL query uses an alias to return a field "h_ordernumber", and the template contains `%h_ordernumber%`, the order number will only appear on the first page of the output.

This function can be used in conjunction with the optional 'second page and above' template specified by the `<path to 4>` parameter, to create 'cover pages' for command-line generated mail merge output.

Note also that the command line function features two extra system variables, `%page%` and `%totalpages%` which can be used for page numbering.

> Command line processing produces a PDF which is then passed back through AutoDoc HSE for processing. While a command line mail merge may produce several pages of merged content, this output won't actually be 'delivered' unless there are standard AutoDoc HSE triggers included in the output (which could include hidden textual commands and colour coded variables in the template, or SQL-returned data for an 'e-mail' column, for example).
>
> Also note that only one command line job should be run at any one time.

Remote printing to AutoDoc HSE

Using extra features included in the AutoDoc HSE installation, it is possible to print to the AutoDoc HSE virtual printer remotely, from any computer which has an internet connection.

The summarised configuration required to achieve this on a standard AutoDoc HSE installation is:

- Where AutoDoc HSE is installed:

    - An additional executable file running and configured on the server on which AutoDoc HSE is installed.

    - Incoming internet traffic to port 515 directed to the server on which AutoDoc HSE is installed.

- On the remote printer from which print jobs will be sent to AutoDoc HSE:

    - The addition of a new printer configuration (a 'virtual' printer – installing drivers for a printer that doesn't physically exist).

- The addition of a new port configuration, to be used by the new printer.

Detailed instructions are as follows:

1. On the server on which AutoDoc HSE is installed, locate and run the AutoDocLPD.exe file. The default file location for this file is:

   ```
   C:\AutoDoc HSE\AutoDocLPD.exe
   ```

2. From the new icon in the system tray, open the interface:
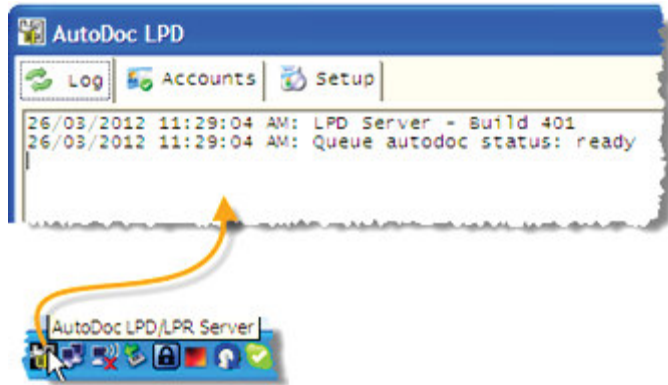
3. In the *Accounts* tab, enter a record in the *GUID* column ('autodoc' is suggested):
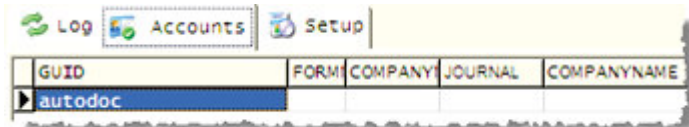
4. Apply the changes and close the window:

5. Within your own organisation's IT policies, ensure that incoming internet traffic to port 515 is directed to the server on which AutoDoc HSE is installed.

6. On the remote computer which is to print to AutoDoc HSE, a new postscript printer needs to be added and configured. This example uses the HP Color LaserJet 5 driver, a widely-available choice.
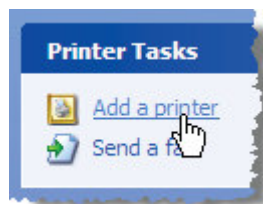
7. Install the printer as a local printer, creating a new TCP/IP port to use for the printer:
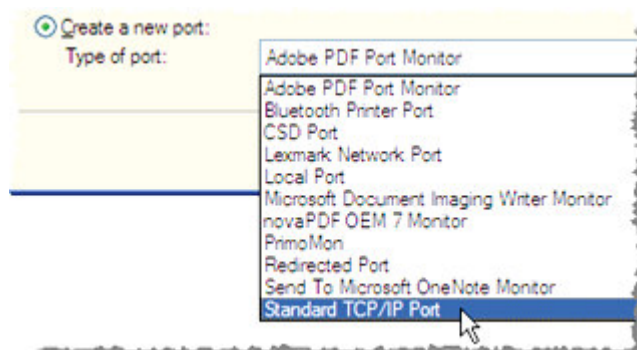
8. Specify your organisation's IP address as the printer's IP address – i.e. the IP address to which the print job will be routed to your AutoDoc HSE's installation.

9. Custom port configuration should be adjusted as indicated:

Note that the *Queue Name* ('autodoc' in this example), must be a case-sensitive exact-match as the entry specified in step 3.

10. Complete the installation of the printer, ensuring that a PostScript printer is selected.

With this configuration, when the remote printer prints to the new postscript printer, the printer will direct the print job to the IP address specified in step 8, to port 515. The AutoDocLPD.exe program will intercept any PCL/PostScript stream and direct it to the printer named "AutoDoc HSE" (the default name for the AutoDoc HSE virtual printer).

Barcodes

AutoDoc HSE can both produce and scan barcodes.

Producing barcode output

The production of barcodes is performed by AutoDoc HSE locating a textual equivalent of a barcode in the source document, and overwriting that text with an actual barcode.

FIGURE 46 - AutoDoc HSE can overwrite a textual code to a barcode.

AutoDoc HSE recognises text that must be converted to barcodes, due to the use of barcode variables.

The syntax of barcode variables is as follows:

```
<name>:bar:<barcode type>:<width>:<height>{:<alignment>}{:<rotation>}
```

...where:

- the variable name is the defined variable name for the variable in question, as for defining a standard variable.

- ":bar:" initiates a barcode variable type, and instructs AutoDoc HSE to overwrite the source document's variable text with a barcode as defined.

- the barcode type parameter requires the specification of a particular barcode type, and can be any of:

  - 128

  - 39

- 39wc

- ean8

- ean13

- 2of5

- 2of5wc

- postnet

- upca

- Width is the width of the barcode stripe

- Height is the height of the barcode

- The optional alignment parameter can be any of:

  - lt (left top)

  - rt (right top)

  - lb (left bottom – this is the default setting)

  - rb (right bottom)

  - lc (left center)

  - rc (right center)

- The optional rotation is specified in degrees, anti-clockwise.

Reading barcodes

✖ Lite
✖ Standard
✖ Server
✓ Enterprise
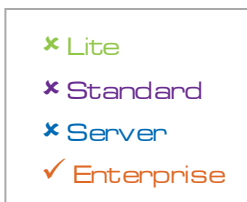
AutoDoc HSE can read barcodes in a PDF document. This function is typically facilitated by placing a copy of the PDF in the HSEScan folder (the default location of this folder is `C:\AutoDoc HSE\HSEScan`). The AutoDoc HSE Print/Scan service that is installed as part of AutoDoc HSE installation monitors this folder and processes any PDF placed here as an AutoDoc HSE print job through form 99. Barcode scanning can also be triggered by printing a document with a barcode to AutoDoc HSE in the usual fashion, provided that the form number in question is configured to recognise barcodes.

By configuring the barcodes section of form 99 (and any other form that will be used for barcode recognition), barcodes can be read and their values treated as though they have been found as coloured text.

For example, consider the following type 128 barcode:

Invoice number barcode:

By configuring the form to read type 128 barcodes, the value of the barcode can then be referenced as a variable or via a translation.
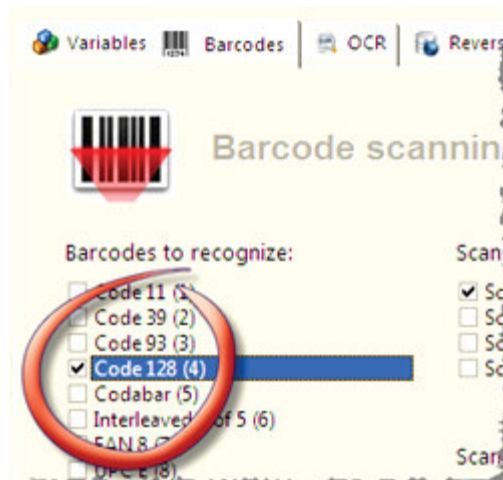
FIGURE 47 - activating barcode recognition.

The label of the barcode types provides the key to referencing the barcode value. In Figure 47 the type 128 checkbox has the number 4 in parenthesis: (4) This indicates that the number 4 will uniquely reference the barcode value for type 128 barcodes, as the final RGB value in the following RGB scheme: 141, 219, 4.

> Note that AutoDoc HSE is artificially constructing a coloured text string in this process. That is, the barcode need not be coloured – the fact that AutoDoc HSE reads the barcode results in AutoDoc HSE *treating* the source document as though it found the barcode value in text of a set RGB value. **All** scanned barcode values are treated as being RGB 141, 219, <barcode type reference>.

With the barcode tab of the form configured to recognise a *Code 128 (4)* barcode type, AutoDoc HSE processes such a barcode as depicted below:
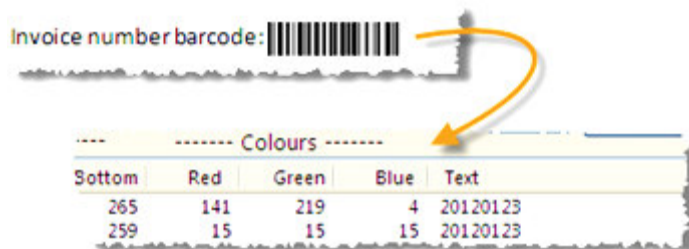
FIGURE 48 - A scanned barcode as displayed in the *Colours/Words* tab of the AutoDoc HSE log. The RGB 141,219,4 entry is constructed artificially by AutoDoc HSE, allowing the barcode value (in this example, 20120123) to be assigned to a variable or used in a translation.

Similarly, if AutoDoc HSE was configured to recognise a *Codebar (5)* barcode, that barcode's value could be referenced using RGB 141,219,5.

OCR (Optical Character Recognition) scanning

✖ Lite

✖ Standard

✖ Server

✓ Enterprise
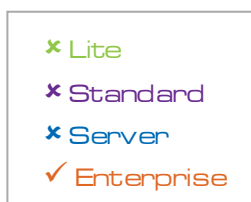
With AutoDoc HSE's OCR function activated, AutoDoc HSE will perform optical character recognition on any documents scanned via the HSEScan folder (via form 99). The default location of this folder is `C:\AutoDoc HSE\HSEScan`. OCR scanning will also be performed on a document processed under any form, through the usual AutoDoc HSE printing process, provided that the form in question has OCR enabled.

This facilitates the recognition of text that is not actually text in the PDF file. For example, a document that has been scanned by a physical scanner may render the text in the output PDF as an image, rather than as text (rather like a photograph of text). Using AutoDoc HSE's OCR function, this text can be treated as normal text by AutoDoc HSE (for example, stored as a variable).

This function requires Microsoft's Office Document Imaging (MODI) to be installed on the computer on which AutoDoc HSE is installed. MODI is typically installed with recent versions of Microsoft Office.
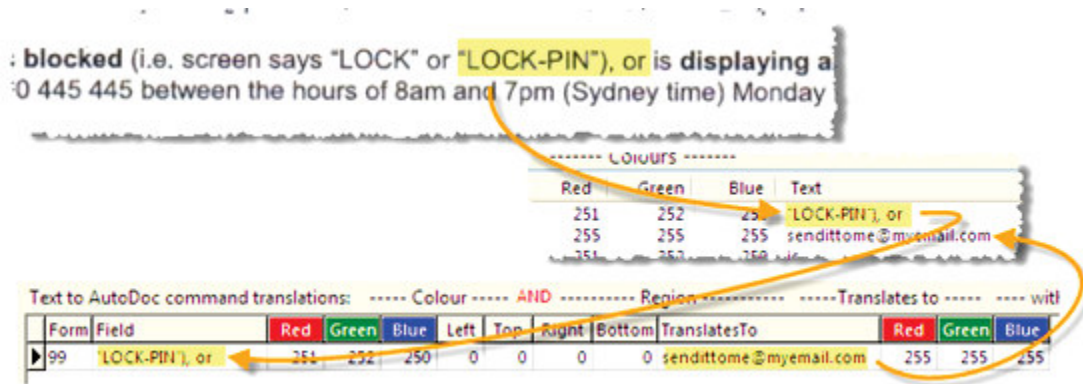
FIGURE 49 - Depicting OCR in action. A PDF document (top) in which the text is actually rendered as an image is placed in the HSEScan folder. With OCR activated on form 99, the AutoDoc HSE log *Colours/Words* tab shows individual blocks of text that have been recognised. With a translation configured to intercept a particular text string, an e-mail can be sent to a specified address, and AutoDoc HSE therefore treats the source document as though it contained a textual command for that e-mail address.

Note that AutoDoc HSE artificially treats any OCR-scanned text as being in RGB 251,252,250; the *Colours/Words* tab can be used to identify scanned OCR text. AutoDoc HSE also includes OCR-scanned text in this near-white colour in any PDF output created as part of processing the print job. For example, scanning a source document PDF which has the text "scan me" included as an image, would result in AutoDoc HSE isolating the "scan me" text as being RGB 251,252,250, and would also include that text, in that colour, in the background of the output PDF, overlaid by the image which also includes the original picture of the "scan me" text. In this way, the output file becomes a text-searchable PDF file which looks the same as the original PDF file (since the text is now included in the background in a near-white colour).

As always, due to the variability of scanner resolutions and other settings, we strongly recommend a thorough test of a number of AutoDoc HSE OCR configurations before utilising OCR for any business critical operations in a production environment.

Appendix A – Version matrix

Different features are offered by different versions of AutoDoc HSE, as summarised in the following table:

Feature	Functional Impact	Version			
		Lite	Standard	Server	Enterprise
Number of forms	Determines the number of distinct combinations of preconfigured delivery settings you can store.	5	5	20	99
Number of variables	Determines how many discrete pieces of document text ('strings') AutoDoc HSE can dynamically store to use in the delivery content.	5	5	199	199
Attachment types	Determine which file types can be used to deliver the print job via email.	PDF	PDF	PDF, XLS, XLT, TXT, MP3	PDF, XLS, XLT, TXT, XML, MP3
Initial users included	Determines how many AutoDoc HSE users can be created before an additional user pack is required to enable more users to be added.	1	1	5	20
Maximum users	Determines the maximum number of AutoDoc HSE users that can be licensed.	1	1	20	No limit
RAW/PCL printing support	Determines whether AutoDoc HSE can process RAW print data from applications such as DOS.	✕	✓	✓	✓
Language sub-forms	Determines whether the e-mail and fax tab of each form can be effectively divided into sub-forms to allow different configurations to be created within each form.	✕	✕	✓	✓
PDF Open security	Determines whether PDFs can be given a password to prevent non-authorised users from opening the files. Note that all versions allow an owner password and print/copy/comment/change permissions to be set.	✕	✕	✓	✓
Strongly-typing variables	Allows variables to be more strongly-typed and validated for use with XML output.	✕	✕	✓	✓
Database integration	Allows a third-party database (such as Microsoft SQL Server) to be mined dynamically, and for the yielded data to be used in AutoDoc HSE output.	✕	✕	✓	✓
Template printing / Command line mail merging	Uses 'mail merge' style functionality to dynamically populate a predefined template with variable data from a third party source.	✕	✕	✓	✓
Remote printing	Facilitates printing to a AutoDoc HSE installation from any internet-connected computer	✕	✕	✓	✓
Multi-threading	Determines whether AutoDoc HSE can multi-thread print processes to accommodate a heavy print job load.	✕	✕	✕	✓

Additional - printers	Determines whether AutoDoc HSE can create additional AutoDoc HSE printers (which can provide specialised functions such as mailback, as well as dividing the processing load).	×	×	×	✓
XML archiving	Determines whether AutoDoc HSE can archive documents in XML file format.	×	×	×	✓
3rd party archiving	Determines whether AutoDoc HSE can invoke third-party document management tools to handle files produced by the AutoDoc HSE archive function	×	×	×	✓
Digital Signing	Determines whether AutoDoc HSE can dynamically pass e-mail attachments to and from third-party signing hardware.	×	×	×	✓
Barcodes	Allows textual codes to be output as barcodes, and allows barcodes to be read.	×	×	×	✓
OCR	Facilitates the use of image-embedded text in variables and translations	×	×	×	✓

Appendix B – System files

AutoDoc HSE's system files reside in the directory in which you elected to install the AutoDoc HSE application. The default AutoDoc HSE directory is `C:\Program Files\AutoDoc HSE`.

While you need not know about the majority of system files in order to successfully use and manage the AutoDoc HSE application, the following explanations of the content of each of AutoDoc HSE's sub-folders are provided for your information.

The files that reside in the AutoDoc HSE directory are:

- `AutoDocHSE.exe` - the AutoDoc HSE application itself.

- `AutoDocHSEDelete.exe` – the application responsible for uninstalling AutoDoc HSE.

- `AutoDocHSEForm.ini` – contains system initialisation settings relevant to the current AutoDoc HSE release.

- `AutoDocHSEPrintTray.exe` – an application involved in the printing process.

- `AutoDocHSEService.exe` – the application providing the separate print/scan user service that can be created to reduce AutoDoc HSE's processing load (see page 19 for more information).

- `AutoDocHSEView.exe` – the 'master copy' of the client viewer, from which the individual client viewers are installed.

- `AutoDocHSEView.ini` – initialisation settings for the client viewer.

- `bszip.dll` – packaged functional procedures.

- `Quick Start Guide.pdf` – the Quick Start Guide (available through the help/licence tab)

- `Quick Start Invoice.rtf` – a sample invoice for use with the procedures documented in the Quick Start Guide.

- `redrun.exe` – associated with print processing.

- `Reference Manual.pdf` – the Manual you are now reading (available through the help/licence tab)

- `ServiceInstalled.ini` – initialisation settings associated with the print/scan service.

- `unins000.*` - used if the AutoDoc HSE application is uninstalled.

- `userpath.txt` – the path for user files.

- `version.ini` – initialisation file associated with licensing.

The subfolders within the AutoDoc HSE folder are depicted in Figure 50, and the content of each is outlined in the following sections.
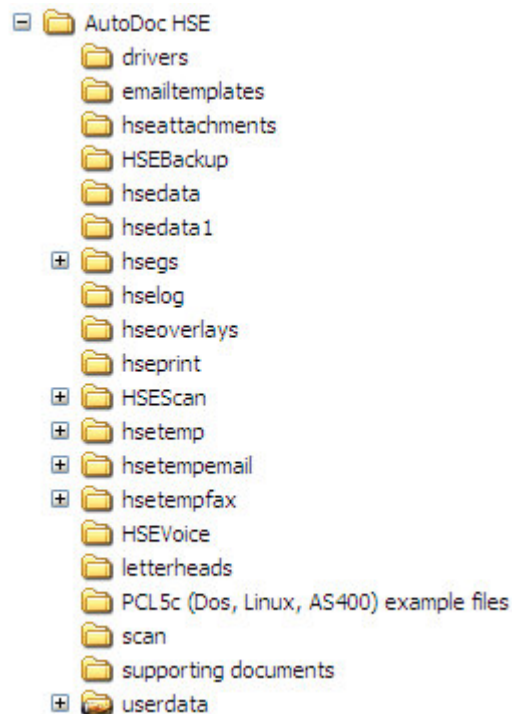
FIGURE 50 – the AutoDoc HSE folder structure

drivers

AutoDoc HSE has its own printer driver, the files for which are located in this folder.

emailtemplates

On installation, this folder is empty, but can be used as an easily accessible location in which to store text or html templates for AutoDoc HSE's e-mail functionality.

hseattachments

Files placed here can be referenced by filename only, as an extra file to be attached to an outgoing e-mail using an extra attachment textual command. See the section on textual commands starting on page 31 for more information about extra attachment command types.

HSEBackup

This folder is the default location for AutoDoc HSE backups (as performed using the *Backup Selected Settings* button on AutoDoc HSE's Backup tab). Note that since uninstalling AutoDoc HSE will also remove this folder and its contents, we recommend that files in this folder are also backed up to a remote location.

hsedata

The following files reside in the hsedata directory:

- `autodochse.ini` - stores settings for the AutoDoc HSE console and global configuration settings.

- `autodochsecolours<form#>.<txt/xml>` – store definitions for user-defined variables, as defined in the Variables tab.

- `autodochsecompany.txt` – stores key/value pairs for company records if AutoDoc HSE data is stored in SQL tables rather than a .ini file. To use SQL tables rather than an ini file, place a file named `XML.txt` in the hsedata folder, and add a connection string (as you would for the Database tab in the Global setup area) as the first line of that file. By also adding a `company.txt` file, with a different company name on each line of that file, multiple companies can be maintained in AutoDoc HSE.

- `autodochse<form#><non-default language code>.<ini/xml>` - stores form template settings.

- `autodochsetranslate.txt` – stores the form independent translation settings.

- `autodochseusers.txt` – stores the user profiles as defined in the AutoDoc HSE Users tab

These files can all be backed up as part of the various AutoDoc HSE backup options in the Backup tab.

hsedata1

As for the hsedata directory, but stores the data for the "IN" version of the forms, rather than the "OUT" version.

hsegs

This directory contains files used for processing print jobs directed to AutoDoc HSE.

hselog

The hselog directory contains the log files associated with the main log. The file named `hselogall.txt` is the current log, containing jobs for all users. This file is only created/updated when the AutoDoc application is closed.

Files in the following format are log files that have been saved during the process of clearing the main log:

`hselog <year>-<month>-<date> <hour>-<minute>-<second>.txt`

The date/time stamp refers to the time at which the log was saved.

hseoverlays

This directory contains the overlays that can be referenced by filename only, rather than by full file path and filename. See page 132 for more information on overlays. The `readme.txt` file located in this directory also provides an explanation of overlays.

hseprint

This directory contains files associated with print processing.

HSEScan

The AutoDoc HSE Print/Scan service monitors this folder and processes any PDF files placed here under form 99 (see the sections on barcode and OCR scanning on pages 225 and 227 respectively). The `Processed` subfolder contains a copy of the documents that have been scanned.

hsetemp

This directory is used by AutoDoc HSE for temporary storage of print processing files, as well as information pertaining to network drives available to AutoDoc HSE.

hsetempemail

This directory is used by AutoDoc HSE for temporary storage of files associated with the creation of e-mails.

hsetempfax

This directory is used by AutoDoc HSE for temporary storage of files associated with the creation of faxes.

HSEVoice

This directory is used by AutoDoc HSE in the process of creating MP3 files.

letterheads

This folder is the default location for letterhead files. We recommend that letterheads are stored here (and backed up elsewhere), to ensure that the files remain local to the AutoDoc HSE application.

PCL5c (DOS, Linux, AS400) example files

This folder contains files that can be used to test the PCL printing configuration, for older, DOS-type applications.

scan

This folder is not used by the current build of AutoDoc HSE.

supporting documents

Used by the Converga version of AutoDoc HSE.

UserData

The UserData directory stores user-specific data, in subfolders for each AutoDoc HSE user:
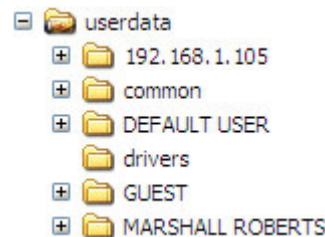
Each of the user folders contains the following sub folders and files:

- `Attachments` subfolder – used by the rediSend version of AutoDoc HSE.

- `LinkDocuments` subfolder – used by the rediSend version of AutoDoc HSE.

- `MapiMail` subfolder – used when the MAPI e-mail protocol has been selected for AutoDoc HSE.

- `Output Tray` subfolder – the location of the PDF file which comprises the output produced by the PDF Printer/Scanner (see page 182 for more details on the PDF Printer).

- `Paper in Front Tray` subfolder – the location of the front tray letterhead files used by the PDF Printer/Scanner.

- `Paper in Manual Feed` subfolder – the location of the Manual Feed letterhead files used by the PDF Printer/Scanner.

- `Paper in Rear Tray` subfolder – the location of the rear tray letterhead files used by the PDF Printer/Scanner.

- `Paper in Tray <tray number>` subfolder – the location of the numbered tray's letterhead files used by the PDF Printer/Scanner.

- `Print` subfolder – temporary folder for documents to be printed to user printers #1 through #4 and the label printer.

- `Scan Tray` subfolder – the folder into which images to be 'scanned' into PDF output are placed. See page 187 for more information on the PDF Scanner.

- `Temporary Documents` subfolder – temporarily holds document output associated with log entries for the user (for example, *.TIF fax files, *.EML e-mail files, and PDF files). Temporary documents are stored here until the user with whom they are associated uses the *Clear the Main Log* button to clear their client viewer's log. Doing so also prevents the temporary documents being accessed from the double-click functionality of the AutoDoc HSE main log (see page 170 for details). Temporary files are named with an ID, which is incremented using the text file named `<deliverymethod>counter.txt`, also located in this folder.

- `AutoDocHSEForm.ini` – contains system initialisation settings relevant to the current AutoDoc HSE release.

- `autodochseview.chk` – temporary file which checks read/write permissions on the parent folder.

- `autodochseView.exe` – the AutoDoc HSE client viewer for this user. See page 181 for information on using client viewers.

- `AutoDocHSEView.ini` – initialisation settings associated with the AutoDoc HSE client viewer for this user.

- `autodochseview.lck` – a lock file.

- `hselog.txt` – the text file containing log information for this specific user. This file is created/updated when the client viewer is closed, and is also updated if the viewer is opened when a `log.txt` file also exists in this folder.

- `log.txt` – the text file which contains information pertaining to jobs that are processed for the user while the client viewer process is closed. When the viewer runs again, the contents of this file are moved into the user's `hselog.txt` file, and this file is deleted (that is, this file does not exist while the viewer is open).

Index

The index is designed to provide a quick reference to important items which are not readily identified using the table of contents alone. Section headings have therefore not been duplicated in the index, except where a particular facet of a topic has been identified as being of potential 'quick reference' interest.

Every control of the AutoDoc HSE application's console, and the client viewer, is listed in the index. To locate an index entry for a control, look under the "Controls" main entry, and then locate the sub-entry for the control in question, by name. Note that option button groups are treated collectively for the purpose of defining the function of the individual options. That is, using Figure 51 as an example, there is an index entry "Controls: *PDF Watermark in*", but not an entry for "Controls: *Background*" nor "Controls: *Foreground*".

FIGURE 51 - an example of an option button group, which is referred to collectively as the *PDF Watermark in* control group, for the purposes of defining the functionality that the individual buttons provide.

Many of the examples given in this manual to assist understanding of key concepts can also be found under the "examples" entry.

W

End of Reference Manual