



AUTODOC HSE

Reference Manual

Installation

Configuration

Processes

Troubleshooting

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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 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.

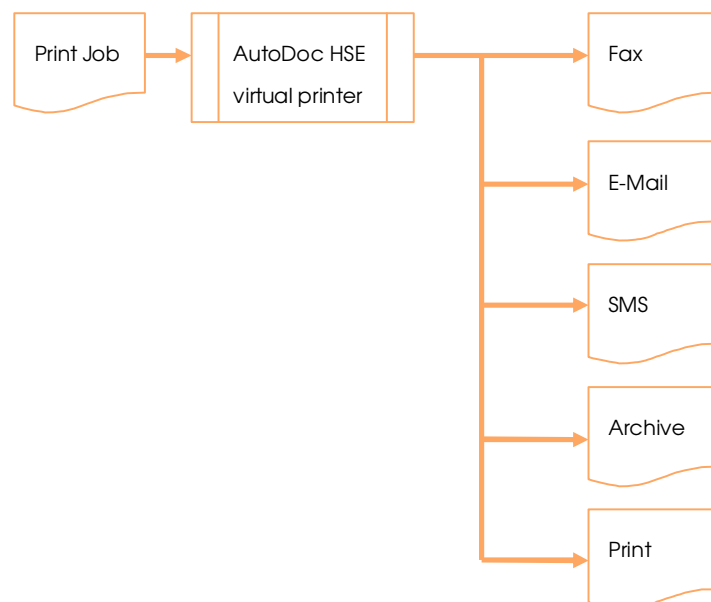


FIGURE 1 - depicting the translation of a print job, via the AutoDoc HSE virtual printer, into delivered documents.

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.
- 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 – 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:\Program files\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\\- 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 NT4 Workstation, Windows 2000 Professional, Windows 2000 Server, Windows 2003 Server, Windows XP Professional or Windows XP Home operating systems.
- If fax functionality is required, you need to be registered with [Streamline MessageSaver](#) or ActiveFax, or have Microsoft Fax installed, configured and running on the machine on which AutoDoc HSE is installed. For more information on registering for or installing a fax service, see the “Registering for, or installing, a fax service” section below. An external phone line is also required for sending faxes via Microsoft Fax.
- If e-mail functionality is required of AutoDoc HSE, Microsoft Exchange is required (if using MAPI), or alternatively, outgoing SMTP mail server settings will be needed for post-installation configuration.
- A minimum of 60 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 the Appendix.

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.



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

Streamline's MessageSaver service is a fax and SMS gateway that provides significant savings on these messaging types. If you would like more information on MessageSaver, or if you would like to register, please refer to the Streamline website for information: www.streamlinesoftware.net

If you don't wish to make use of the MessageSaver service, 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", with your operating system – for example, "enable fax service windows XP")

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`.

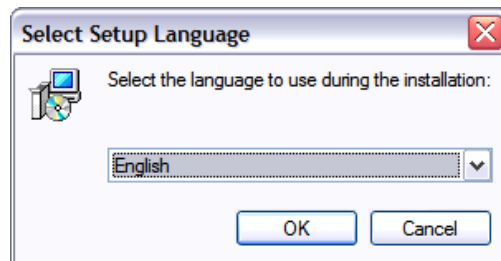
Running from a downloaded file

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

1. Browse to the location to which the `setup.exe` file was downloaded.
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:

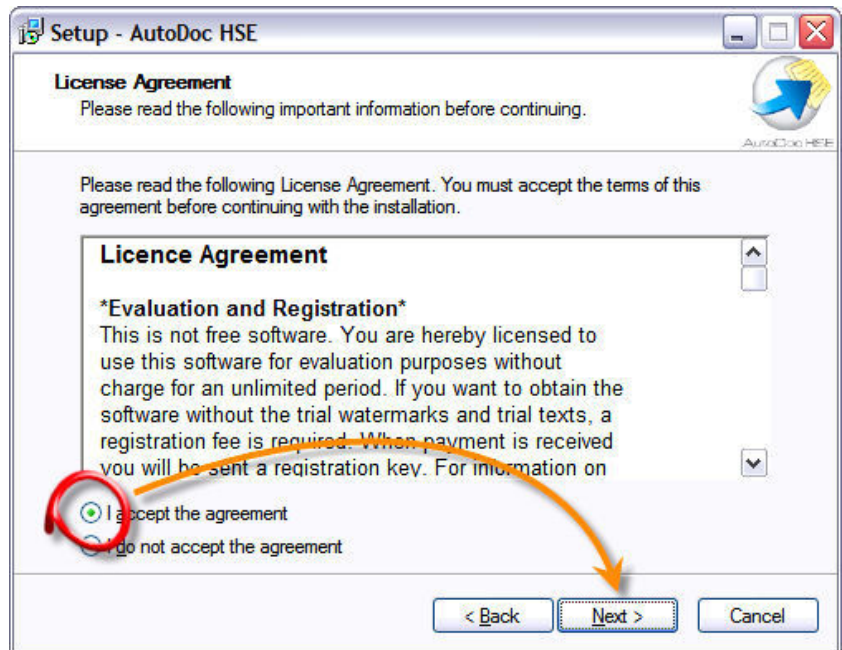


1. Select your language and click the *OK* button to continue. The setup wizard is launched:

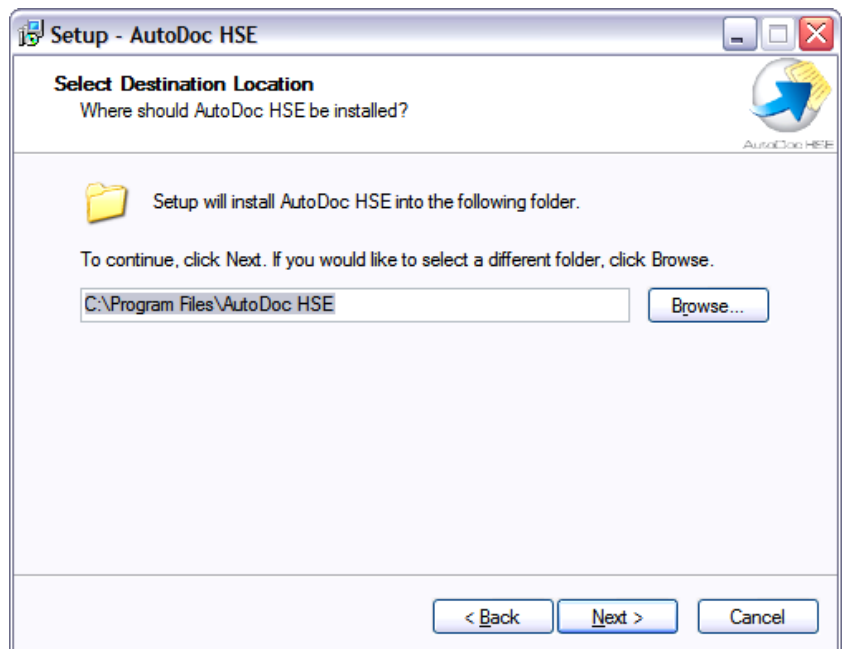


2. Click the *Next* button to continue.

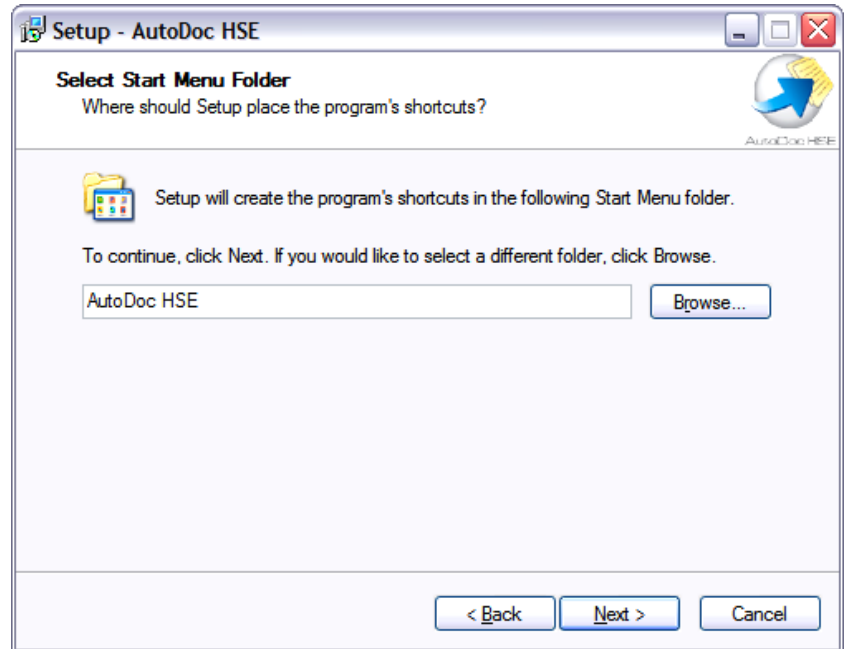
3. If you wish to proceed with the installation, read and accept the licence agreement, and click the *Next* button:



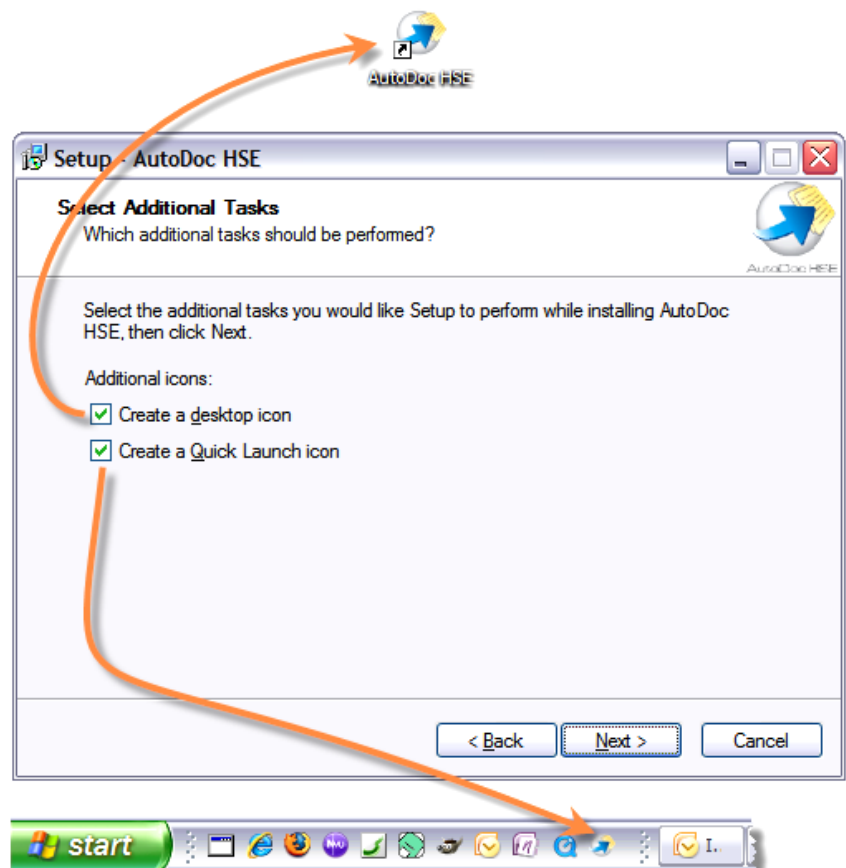
4. Select the location in which you want AutoDoc HSE to be installed (it is recommended that you accept the default location), then click the *Next* button:



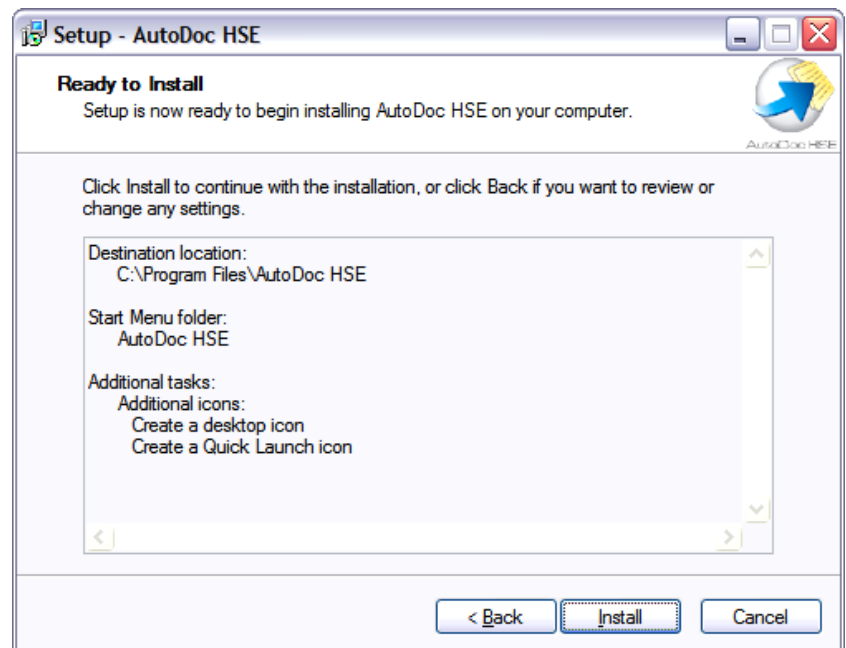
5. Select the Start Menu folder in which you want the AutoDoc HSE program's icons to be installed (it is recommended that you accept the default location), then click the *Next* button:



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:

Completing the AutoDoc HSE Setup Wizard

Setup has finished installing AutoDoc HSE on your computer. The application may be launched by selecting the installed icons.

Click Finish to exit Setup.

☒ Launch AutoDoc HSE

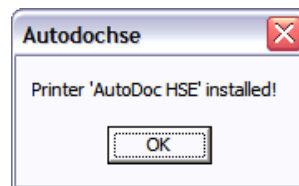
☐ Launch AutoDoc Quick Start Guide (PDF)

9. Clear the checkboxes for launching the documentation items, and leave the *Launch AutoDoc HSE* checkbox checked:

☒ Launch AutoDoc HSE

☐ Launch AutoDoc Quick Start Guide (PDF)

10. To complete the installation, the newly-installed application must be opened. Click *Finish* to launch it now. When the application is opened, AutoDoc HSE will create a virtual, shared printer called 'AutoDoc HSE', and you will receive a prompt stating that this process has completed (only on the first time you run the application):



Initial configuration

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 the network resources available to AutoDoc HSE, which greatly increases your options when configuring the system.

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



Note that if you intended 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.

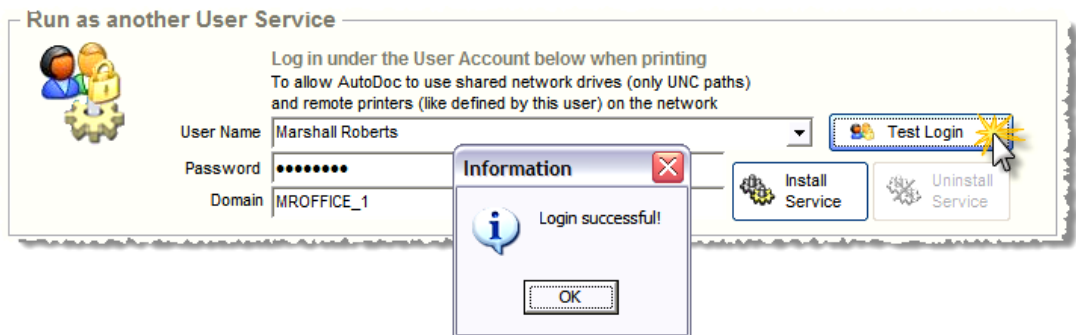


1. Navigate to the General tab of the global setup area. The General tab is the first tab in the global setup view:

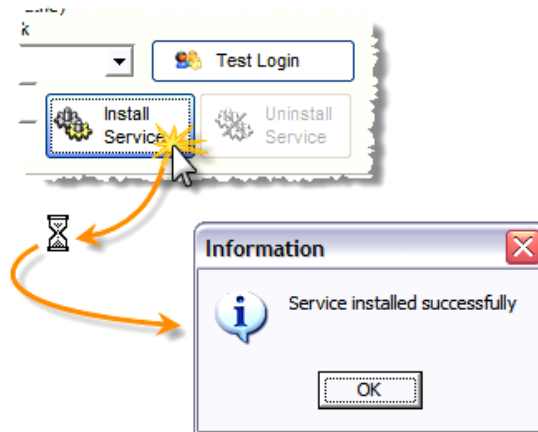


2. The *Run as another User Service* control group is located within the General tab. Complete the *User Name*, *Password*, and *Domain* fields (see page 46 for

more details on these fields, if needed), and use the *Test Login* button to ensure AutoDoc HSE can successfully use this login:

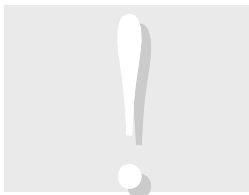


3. Install the service under the specified login using the *Install Service* button:



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 39).



Additional AutoDoc HSE printers

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 Printer tab (see Figure 2 below). The *Create extra HSE Printer(s)* area facilitates this functionality. See the section starting on page 69 for information on using these controls.

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.

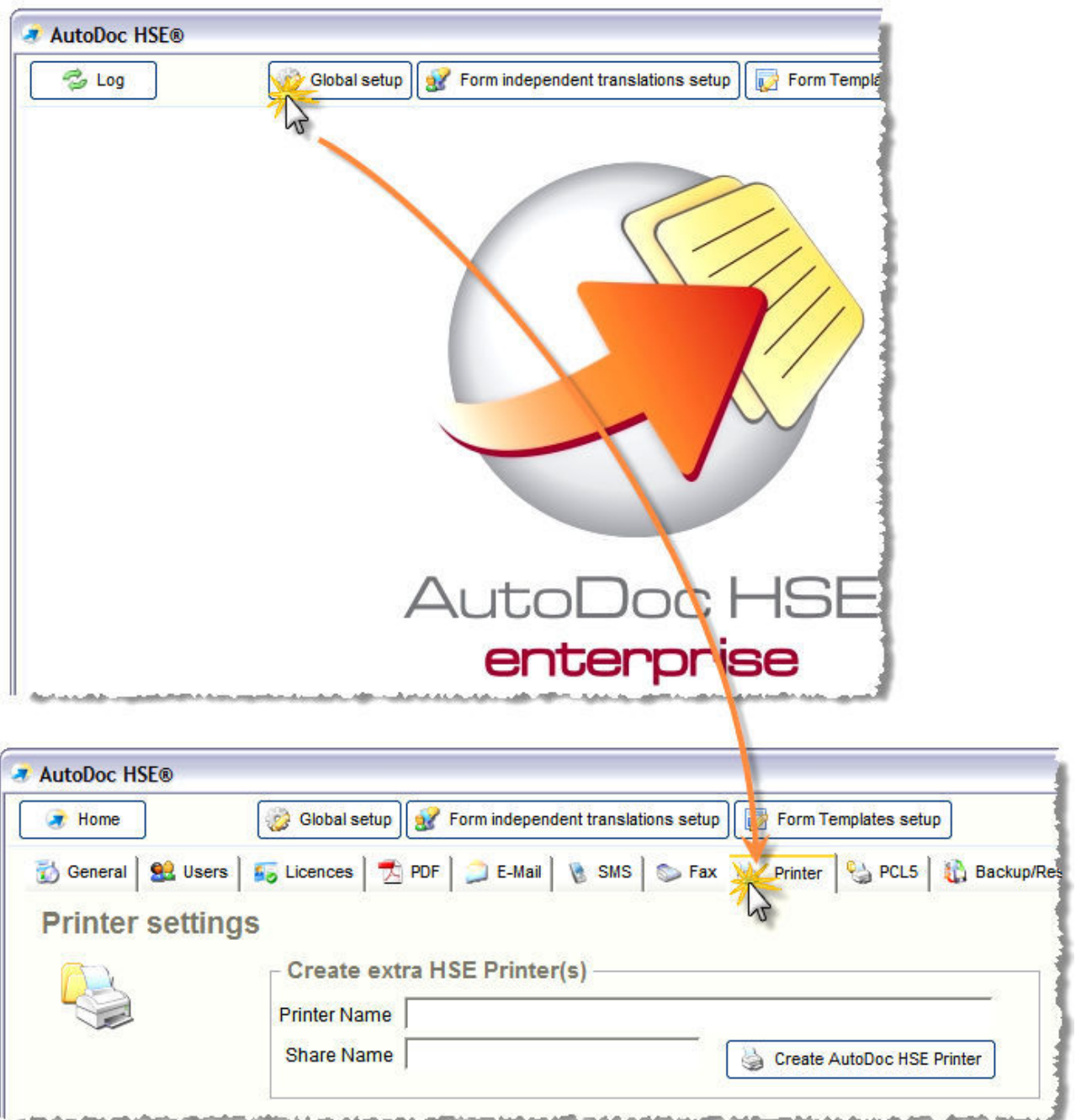


FIGURE 2 - navigating to the Printer tab, located in the global setup area. Additional AutoDoc HSE printers can be created here to accommodate heavy print loads (enterprise version only).



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 same advantages as 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
- Forms

The following sections introduce each of these concepts, and the final section, "Putting it all together", summarises 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 via e-mail.

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.

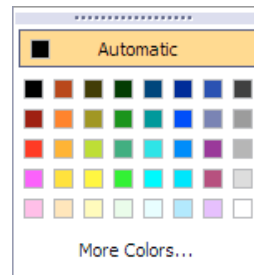


FIGURE 3 - the Windows palette

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.

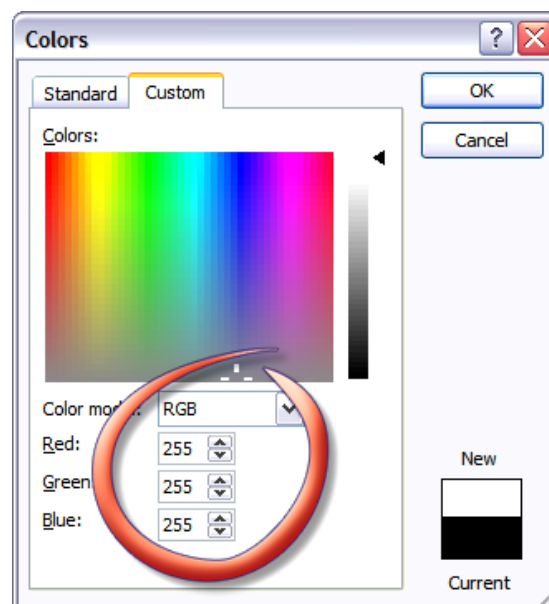


FIGURE 4 - a Microsoft application's custom palette, showing the 'RGB' numeric settings. In this case, all colour values are at their maximum (255), which, mimicking the natural light spectrum, produces white.

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 20, 20, 20 (that is, 'not quite black' – black is 0, 0, 0). 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.

Eight command types can be added to a document. Four of these 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.

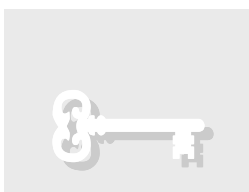
The remaining four command types affect content of delivery:

- 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 127).
- 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 98 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 (see page 154 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 121. The information above, together with the remainder of this chapter, is enough to provide familiarity with the core concepts.

Translations



The previous “Textual commands” section 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 through ‘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.

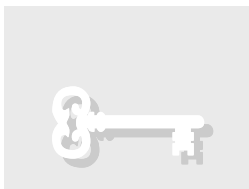
Translations allow for pre-existing text to represent each of the textual command types (for example, e-mail addresses and fax numbers). The same 'string' of text can be configured to represent one, some, or all of the command types, as well as more than one of the same command type (as in our example,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

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 74 for more details on using wildcards.

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 20 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.
- %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%).
- %language% - the two letter language code under which the job is processed.
- %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% - quarter of system date – for example, '3' for September.
- %yyyy% - four-digit year stamp of system date – for example, '2005'.
- %yy% - two-digit year stamp 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.
- %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 only be used with PDF archiving, to represent the resultant archive file. See the *Parameters* control definition on page 115 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 120 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.

User-defined variables can be understood as being similar to AutoDoc HSE translations. Like translations, they are usually based on pre-existing text strings (rather than text added specifically for the sake of AutoDoc HSE), and are defined as being of a certain RGB value (like commands). However, in contrast to translations, 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 (*not* a *specific* piece of text, such as 'XYZ Newsletter' from the translations example). 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 20 variables therefore appear by default in 20 shades which are not strictly black, but which appear as black to the human eye (as an example, this sentence has an RGB value of 20,20,20, the 'least black' of the default 'not quite black' settings recognised by AutoDoc HSE).

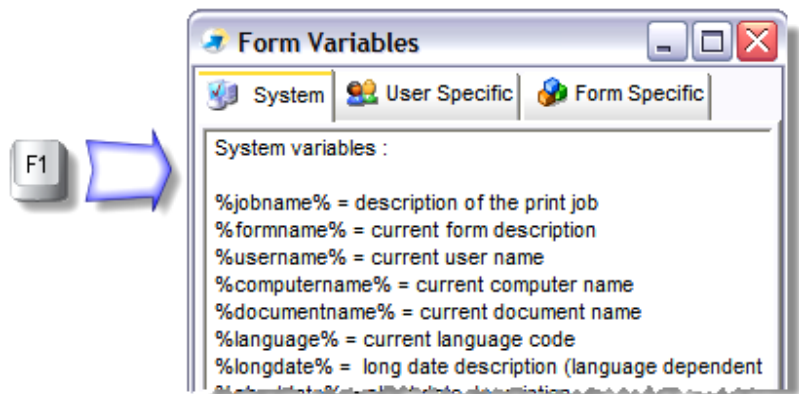
A practical example of a user-defined variable is a report heading. If the report was a financial 'Profit & Loss' report produced by an accounting application, the application could write out that report's heading ('Profit & Loss') in a 'not quite black' text (for example, RGB = 1, 1, 1). On receiving 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 81, 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.



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.

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. Similarly, text to be used for translations can also be defined by regions rather than by font colour.

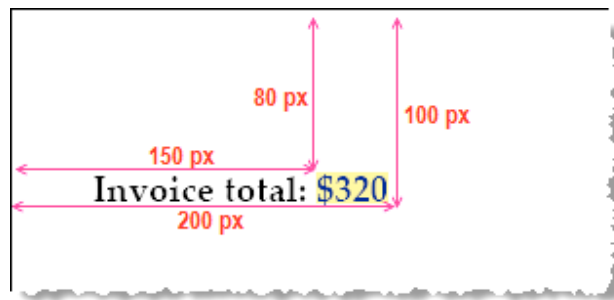
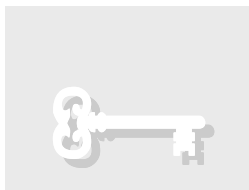


FIGURE 5 - defining a region for the text \$320. This text could be captured as a variable or translation by defining the region 150,80,200,100, which defines the left top corner and right bottom corner of a rectangular region, measured from the top left corner of the page.

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.

Forms



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

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. For example, 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 (RGB = 255, 255, 255), 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

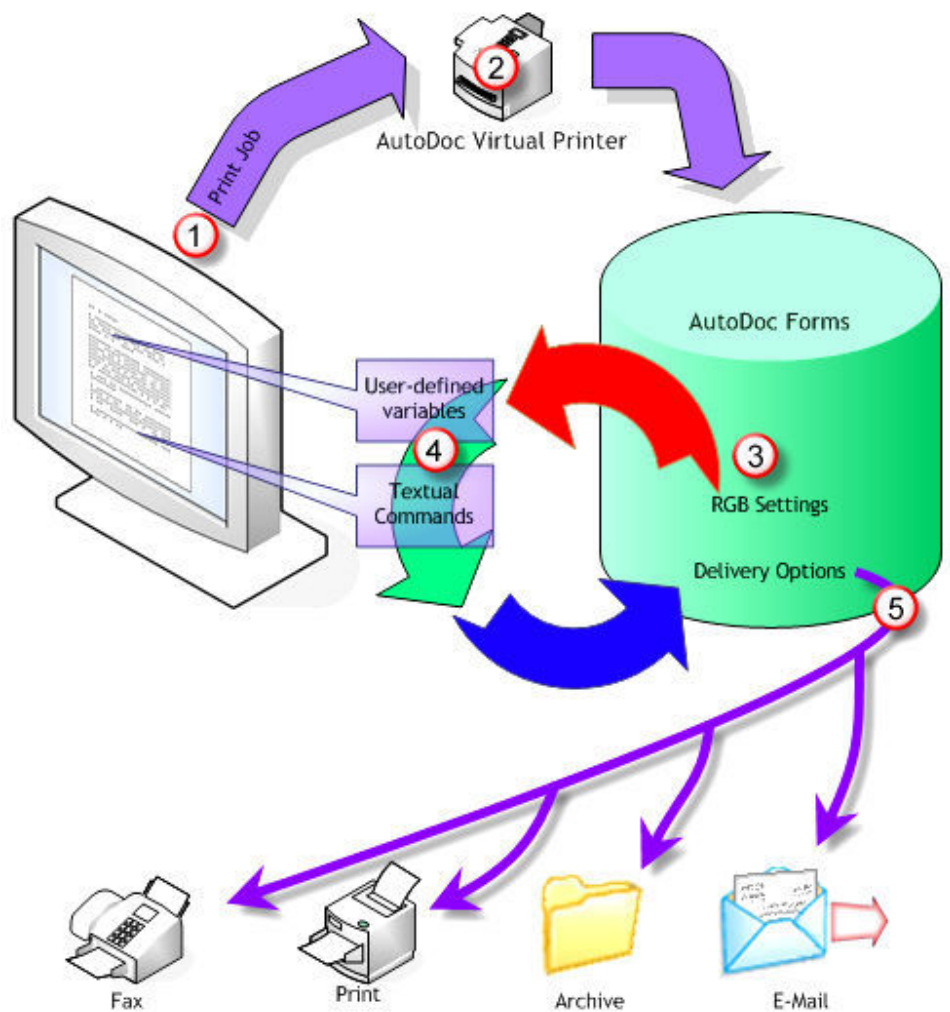


FIGURE 6 – the relationship between AutoDoc HSE's main concepts and entities.

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.



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

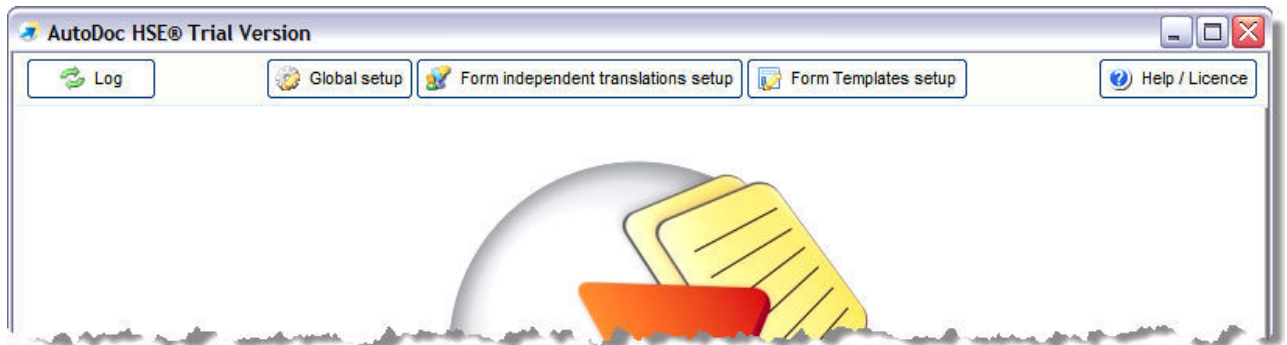
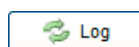


FIGURE 7 - the navigation buttons in AutoDoc HSE's application home page.

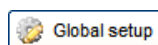
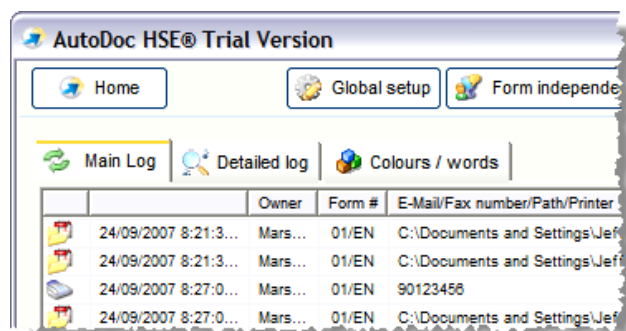
The AutoDoc HSE application is purely a configuration and management console, used to define how print jobs should be handled. The console itself produces no functional output – this is the role of the AutoDoc HSE virtual printer.

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:



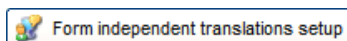
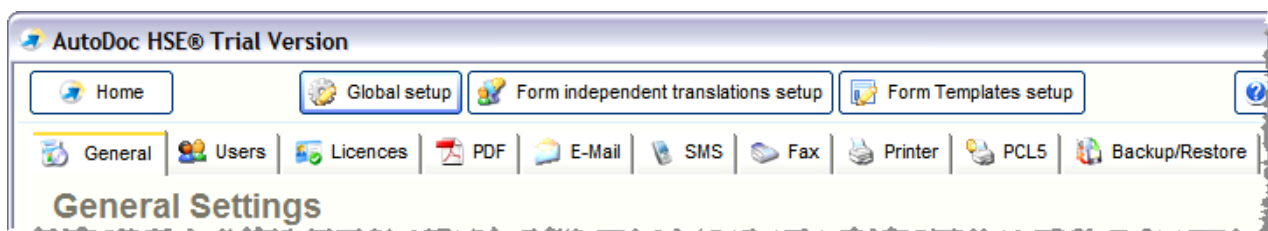
Log

- *Log* – detailed in chapter 7 entitled “Logs, extras, system files, help & licence”, starting on page 136. The log view appears as follows:

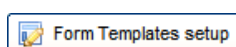
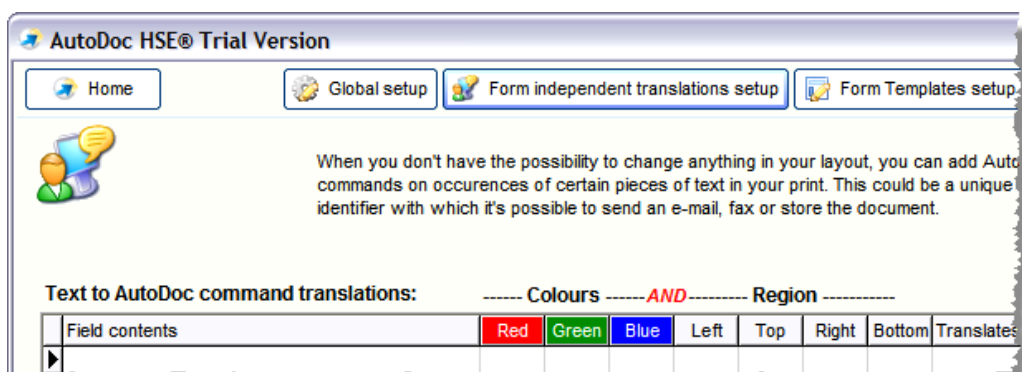


Global setup

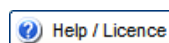
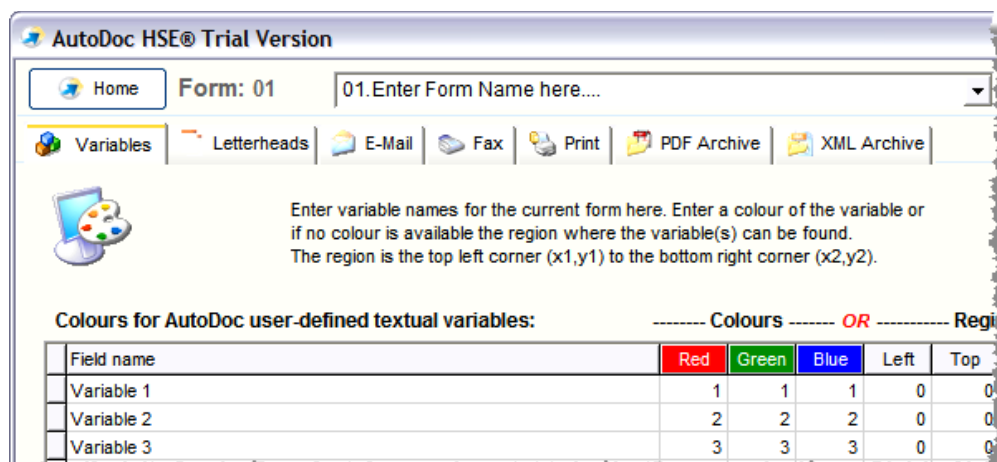
- *Global setup* – detailed in this chapter, in the section below, entitled “Global configuration”, starting on page 43. The global setup view appears as follows:



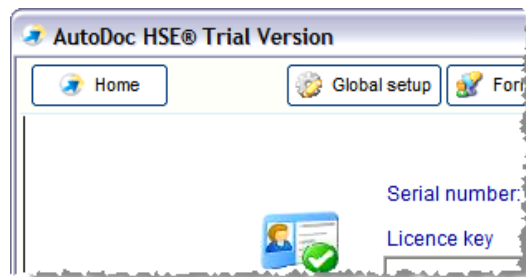
- *Form independent translations setup* – detailed in this chapter, in a subsection of the Global configuration section below, entitled “Form independent translations setup”, starting on page 74. The form independent translations setup view appears as follows:



- *Form Templates setup* – detailed in this chapter, in the section entitled “Form configuration”, starting on page 79. The form templates setup view appears as follows:



- *Help/Licence* – detailed in chapter 7 entitled “Logs, extras, system files, help & licence”, starting on page 136. 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 (see Figure 8).

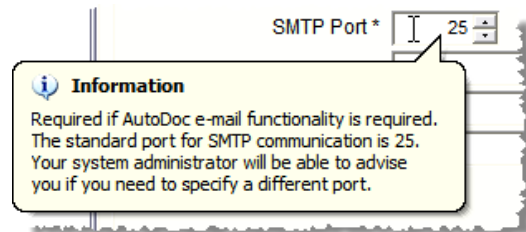


FIGURE 8 – tool tips.

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 default form number specified.

Specifying a default form number on the printer is achieved by adding a form number indicator to the printer's properties dialogue:

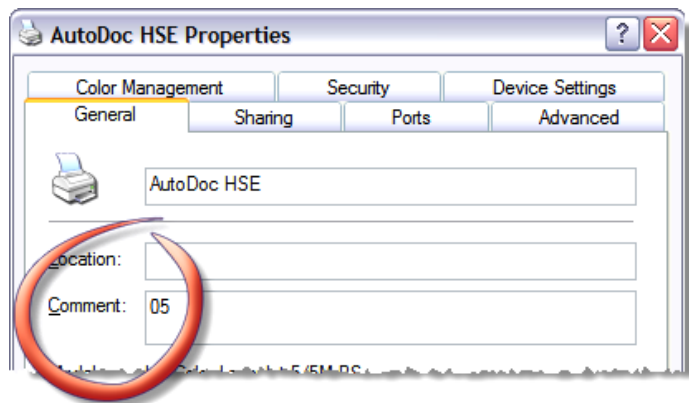


FIGURE 9 – showing an AutoDoc HSE virtual printer’s properties dialogue. The indicator in the *Comment* control is 05. If the 05 text were changed to 12, any print jobs sent to AutoDoc HSE via this printer, with no form number included, would be processed by form 12.

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:

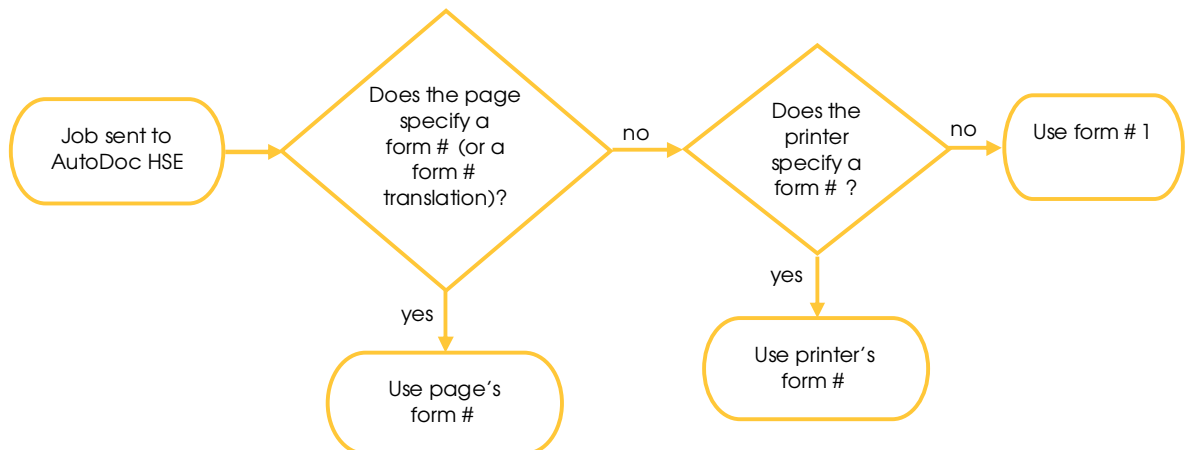


FIGURE 10 - showing the hierarchy of form numbers that are used when a job is sent to the AutoDoc HSE printer.

For example, if a page has an e-mail address textual command, but no form number, and no default 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 (and would also be sent to any other recipients specified in 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 124 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 form number in the printer's comments) with this in mind.

Generic or specific?



Because the 20 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' (as in the previous 'Profit & Loss' report example), 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 137 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 24 on page 153 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.
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':

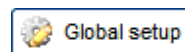
H:\Invoices\



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 17. 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 typically 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:

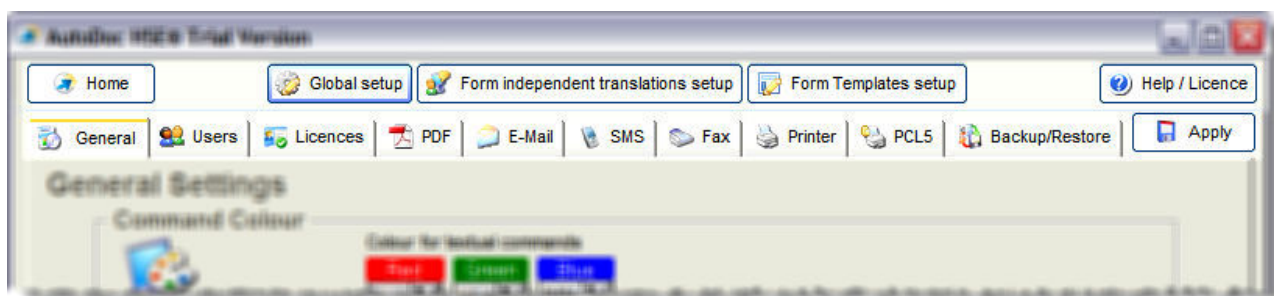


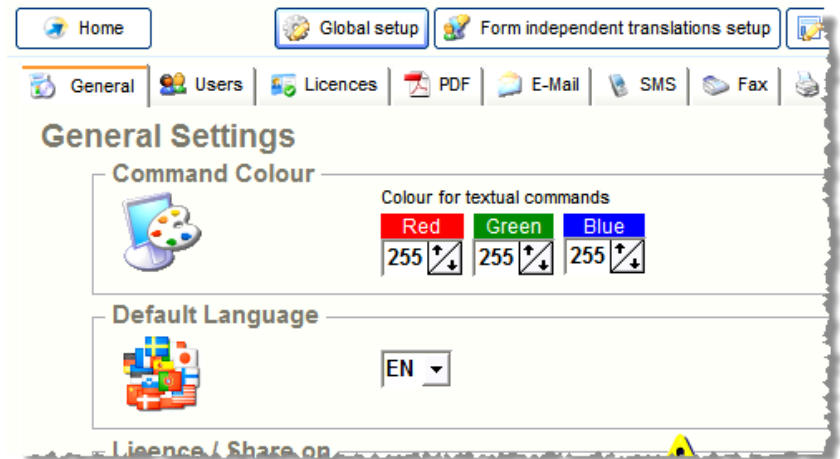
FIGURE 11 - showing the group of controls collectively known as the global setup header.

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

Control Name	Control Description
<i>Home</i>	Use this button to move from the global setup area back to the home page.
<i>Global setup</i>	Use this button to move to the global setup area (defined from page 45 in this document).
<i>Form independent translations setup</i>	Use this button to move to the translations setup area (defined from page 74 in this document).
<i>Form Templates setup</i>	Use this button to move to the form setup area (defined from page 79 in this document).
<i>Help/Licence</i>	Use this button to move to the Help/Licence area (defined from page 161 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 45).
<i>Apply</i>	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
<i>Red</i>	<p>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.</p> <p>A minimum of 0 and a maximum of 255 (as much red as possible) are allowed.</p>
<i>Green</i>	<p>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.</p> <p>A minimum of 0 and a maximum of 255 (as much green as possible) are allowed.</p>
<i>Blue</i>	<p>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.</p> <p>A minimum of 0 and a maximum of 255 (as much blue as possible) are allowed.</p>



<i>Default Language</i>	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 26 for an introduction to the language textual command).
-------------------------	--

<i>License / Share on</i>	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.
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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.

<i>Administrator's E-Mail Address</i>	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 133, for more details on the notifications delivered under this function.
---------------------------------------	--

<i>User Name</i>	This drop down control is used to choose a Windows user profile under which the optional user service will be created. See page 17 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.
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<i>Password</i>	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 17 for more details on the benefits of running an additional service, as well as recommendations for use.
-----------------	--

<i>Domain</i>	This text control is used to enter the domain of the profile under which the optional user service will be created. See page 17 for more details on the benefits of running an additional service, as well as recommendations for use.
---------------	--

<i>Test Login</i>	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):

Name	Description	Status	Startup Type
.NET Runtime Optimization Service...	Microsoft ...		Manual
Alerter	Notifies sel...		Disabled
Apple Mobile Device	Provides th...	Started	Automatic
Application Layer Gateway Service	Provides s...	Started	Manual
Application Management	Provides s...		Manual
ASP.NET State Service	Provides s...		Manual
AutoDoc HSE Print/Scan Services		Started	Automatic
Automatic Updates	Enables th...	Started	Automatic
Background Intelligent Transfer S...	Transfer...	Started	Automatic

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.



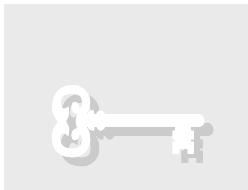
Uninstalling a service for an existing AutoDoc HSE implementation will therefore prevent successful processing, if any of your AutoDoc HSE forms are configured to access remote resources.

This button is only enabled if the service has been installed.

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.

The screenshot shows the 'Users' tab in the AutoDoc HSE configuration software. The window has a menu bar with 'Home', 'Global setup', 'Form independent translations setup', 'Form Templates setup', and 'Help / Licence'. Below the menu bar is a toolbar with icons for 'General', 'Users', 'Licences', 'PDF', 'E-Mail', 'SMS', 'Fax', 'Printer', 'PCL5', and 'Backup/Restore', followed by an 'Apply' button. The 'Users' tab is active, showing a list of users on the left with 'DEFAULT USER' selected. The main area contains a form for configuring the selected user. A note at the top states: 'For each user a separate profile can be set up. All values entered in these fields can be incorporated in almost all other fields to provide for dynamic creation of PDF files, E-Mail text, Fax text and so on. The values can be found by pressing the F1 key.' The form fields include: 'User name *' (a dropdown menu showing 'DEFAULT USER'), 'Full name *' (a text field with the placeholder 'Name of default user'), 'E-Mail address *' (a text field with the placeholder 'youremail@yourprovider.com'), 'Fax number' (a text field), 'Company' (a text field), 'Title' (a text field), 'Department' (a text field), 'Office location' (a text field), 'Address' (a large text area), 'Office Phone' (a text field), 'Home Phone' (a text field), and 'Remarks' (a text field).



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 146) for more information.

See page 53 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
<i>Users</i>	<p>This list box shows all the users (equivalent to Windows login usernames) defined for use in the AutoDoc HSE system.</p> <p>To view or edit an existing record, click on a username in the list.</p> <p>Note that the scrollbar at the right of the view facilitates a record-by-record scroll through the user list.</p> <p>Users are listed alphabetically.</p>
<i>User name</i>	<p>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.</p> <p>You can select an existing user from the list of Windows users, or create a new entry.</p> <p>This is a mandatory control for user records.</p> <p>This control's variable name is %username%.</p>
<i>Full name</i>	<p>Use this text control to enter the full name of the person who uses the Windows login username specified in the <i>User name</i> control.</p> <p>This is a mandatory control for user records.</p> <p>This control's variable name is %fullname%.</p>
<i>E-Mail address</i>	<p>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.</p> <p>This is a mandatory control for user records.</p> <p>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</p>

	<p>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).</p> <p>This control's variable name is %emailaddress%.</p>
<i>Fax number</i>	<p>Use this text control to enter the contact fax number applicable to this user.</p> <p>This control's variable name is %faxnumber%.</p>
<i>Company</i>	<p>Use this text control to enter the company name.</p> <p>This control's variable name is %company%.</p>
<i>Title</i>	<p>Use this text control to enter the user's title/position description.</p> <p>This control's variable name is %title%.</p>
<i>Department</i>	<p>Use this text control to enter the department within the company to which this user belongs.</p> <p>This control's variable name is %department%.</p>
<i>Office location</i>	<p>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.</p> <p>This control's variable name is %officelocation%.</p>
<i>Address</i>	<p>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.</p> <p>This control's variable name is %address%.</p>
<i>Office phone</i>	<p>Use this text control to enter the office contact number of the user.</p> <p>This control's variable name is %officephone%.</p>
<i>Home Phone</i>	<p>Use this text control to enter the after hours contact number of the user.</p> <p>This control's variable name is %homephone%.</p>
<i>Remarks</i>	<p>Use this text control to record miscellaneous information for the user.</p>

	This control's variable name is %remarks%.
<i>User Printer (#1-4)</i>	<p>Use these drop-down lists to specify the real printers to which this user's documents may be printed.</p> <p>The printers available in the list will be determined by whether the AutoDoc HSE user service is running (see page 17 for more details on the user service):</p> <ul style="list-style-type: none"> ▪ If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed. ▪ If the service is running, all printers, including network printers, which are accessible to the machine on which AutoDoc HSE is installed will be listed. <p>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.</p>
+	<p>Use this button to insert a new user record for editing, and to save that new record and insert another new record.</p> <p>Records are listed alphabetically.</p>
-	<p>Use this button to delete the record of which the details are currently displayed. You will be prompted to confirm your action.</p> <p>This button is not available if the details displayed are for the Default User, as the Default User cannot be removed from the system.</p>
×	Use this button to discard changes made to the details displayed.
<i>Copy from Default User</i>	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 <i>User name</i> or <i>Full name</i> of the Default User.
<i>User file location</i>	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

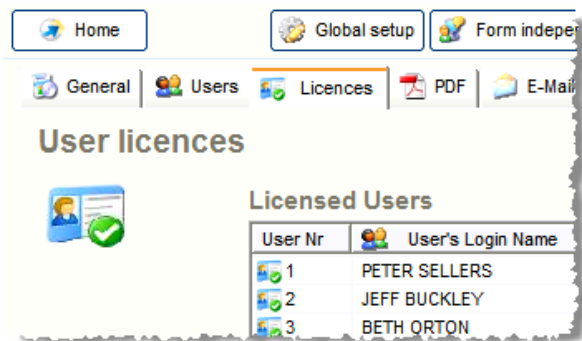
so. You can either enter text directly in the control, or use the browse button to the right of the control, to open a browse dialogue.

Note the important information regarding file locations on page 42.



Licences

Lite: 1 (max 1)
 Standard: 1 (max 1)
 Server: 5 (max 20)
 Enterprise: 5 (unlimited)

The Licences 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.



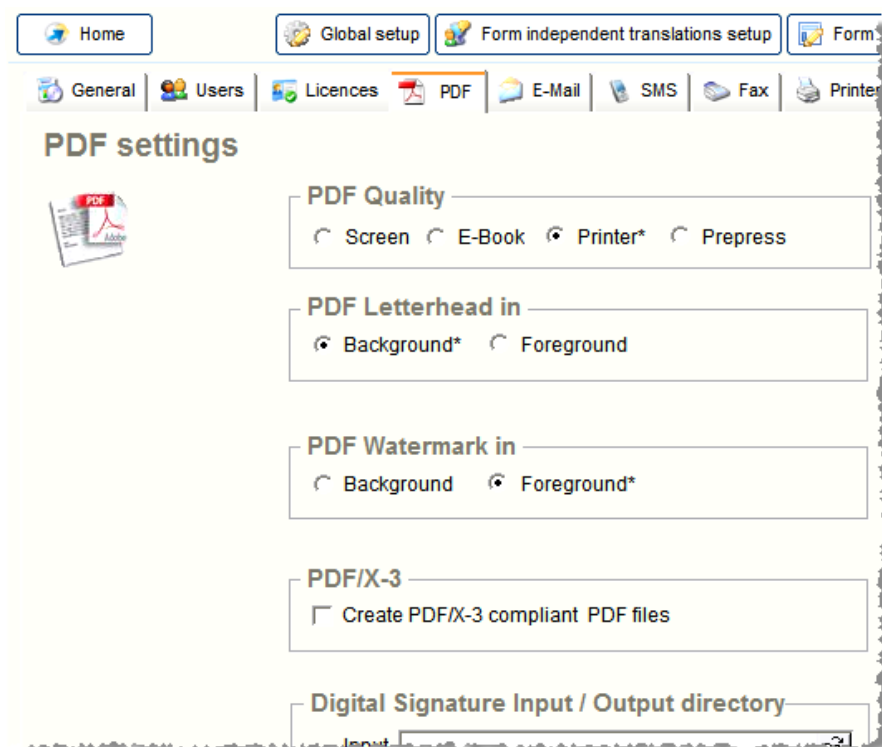
The following table provides detail for each of the controls in the Licences tab:

Control Name	Control Description
<i>User Nr</i>	<p>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.</p> <p>  20  21 </p> <p>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.</p>
<i>User's Login Name</i> <i>Machine Name</i>	<p>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 <i>User name/Machine name</i> text control.</p>
<i>User name</i> <i>Machine name</i>	<p>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.</p> <p>The name entered here is reproduced in the <i>User's</i></p>

	<i>Login Name/Machine Name</i> column, for the currently selected record.
<i>New User</i> <i>New Machine</i>	This button is used to open a new row in the list. When a new row opens, the <i>User Nr</i> column displays whether the new user/machine can be accommodated within the current licence count.
<i>Delete User</i> <i>Delete Machine</i>	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 91 for more details on digital signatures).



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

Control Name	Control Description
<i>PDF Quality</i>	<p>This group of option buttons is used to specify the quality of the PDF output produced by AutoDoc HSE. <i>Screen</i> represents the lowest quality, while <i>Prepress</i> represents the highest quality.</p> <p>Note that the file size of the PDF output will be affected proportionally by the quality option selected.</p> <p>The default selection is <i>Printer</i>.</p>
<i>PDF Letterhead in</i>	<p>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</p>



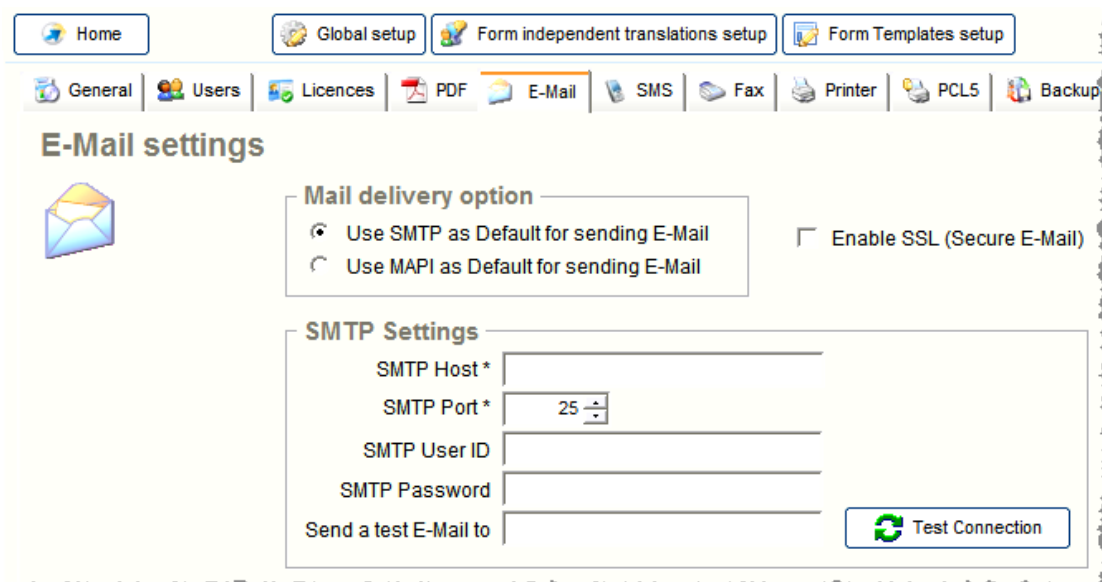
	<p>overwrite document content if created without transparency. It is recommended that you experiment with letterhead positioning, and foreground/background options, when configuring AutoDoc HSE.</p> <p>The default selection is <i>Background</i>.</p>
<i>PDF Watermark in</i>	<p>This group of option buttons is used to specify how AutoDoc HSE includes watermarks applied to PDFs. Depending on your document content, watermarks in the background may be overwritten by document content, while watermarks in the foreground may overwrite document content if created without transparency. It is recommended that you experiment with watermark positioning, and foreground/background options, when configuring AutoDoc HSE.</p> <p>The default selection is <i>Foreground</i>.</p>
<i>Create PDF/X-3 compliant PDF files</i>	<p>This checkbox is used to specify that PDF outputs produced by AutoDoc HSE should be created under the X-3 PDF subset standard.</p>
<i>Input</i>	<p>This text control is used to specify the input folder for digitally signing e-mail attachments produced by AutoDoc HSE. See page 91 for more details on digital signatures.</p>
<i>Output</i>	<p>This text control is used to specify the output folder for digitally signing e-mail attachments produced by AutoDoc HSE. See page 91 for more details on digital signatures.</p>

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 even if you do not intend to use AutoDoc HSE to generate e-mail, AutoDoc HSE will not be able to perform any of the following unless this tab is completed:

- Provide e-mailed feedback regarding any errors (as per the *Administrator's E-Mail Address* control, defined on page 46)
- 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
<i>Mail delivery option</i>	<p>This group of option buttons is used to specify the protocol under which AutoDoc HSE will deliver e-mail by default. Selecting <i>Use SMTP as Default for sending E-Mail</i> enables the <i>SMTP Settings</i> control group, and the <i>Enable SSL</i> checkbox, whereas selecting <i>Use MAPI as Default for sending E-mail</i> disables these controls.</p> <p>Note that this default protocol can be overridden on a form-by-form basis, as part of the configuration of the</p>

form setup E-Mail tab.

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

Enable SSL (Secure E-mail)

This checkbox is used to enable e-mail transmission under Secure Socket Layers. Checking this checkbox enables the *Secure SMTP Settings* control group. 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 91 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.

Before implementing SSL, please visit the Streamline Software website for an update on our trial of this feature.

This checkbox is disabled unless the *Use SMTP as Default for sending E-Mail* option button is selected (since, under the MAPI option, it is assumed that any SSL requirements are managed by the Exchange server).

<i>SMTP Host</i>	<p>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.</p> <p>This control is disabled unless the <i>Use SMTP as Default for sending E-Mail</i> option button is selected.</p>
<i>SMTP Port</i>	<p>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.</p> <p>The default value for this control is 25, which is the standard port for SMTP use.</p> <p>This control is disabled unless the <i>Use SMTP as Default for sending E-Mail</i> option button is selected.</p>
<i>SMTP User ID</i> <i>SMTP Password</i>	<p>Both of these text controls would normally be left blank. However, if, upon testing your AutoDoc HSE e-mail configuration (using the <i>Test Connection</i> 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.</p> <p>These controls are disabled unless the <i>Use SMTP as Default for sending E-Mail</i> option button is selected.</p>
<i>Send test E-Mail to:</i>	<p>Use this text control to enter a target e-mail address for a test e-mail.</p> <p>This control is disabled unless the <i>Use SMTP as Default for sending E-Mail</i> option button is selected.</p>
<i>Test Connection to SMTP server</i>	<p>Use this button to test AutoDoc HSE's e-mail configuration, once the <i>SMTP Host</i> and <i>SMTP Port</i> controls have been completed. You can optionally complete the <i>Send test E-mail to</i> control to send a test e-mail (recommended). You will be notified of whether the test was successful.</p> <p>This control is disabled unless the <i>Use SMTP as Default for sending E-Mail</i> option button is selected.</p>
<i>Key File</i>	<p>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.</p> <p>Variables can be used in this control to allow different key files to be used under different circumstances.</p>

	<p>This control is disabled unless the <i>Enable SSL (Secure E-mail)</i> checkbox is checked.</p>
<i>Root Cert File</i>	<p>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.</p> <p>Variables can be used in this control to allow different root certificate files to be used under different circumstances.</p> <p>This control is disabled unless the <i>Enable SSL (Secure E-mail)</i> checkbox is checked.</p>
<i>Server Cert File</i>	<p>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.</p> <p>Variables can be used in this control to allow different server certificate files to be used under different circumstances.</p> <p>This control is disabled unless the <i>Enable SSL (Secure E-mail)</i> checkbox is checked.</p>

SMS

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

The SMS delivery method is essentially a 'sub-set' of the e-mail delivery method. When AutoDoc HSE encounters a valid SMS command, it sends a preconfigured SMS message (see the form setup item regarding SMS messaging on page 90 for more details on the SMS message) to a gateway service, via e-mail, with the phone number included as part of the e-mail.

The format of SMS textual command formats vary depending upon the SMS program chosen (see the definition for the *SMS program selection* control group below for more detail).




Before using Streamline Software's MessageSaver service for SMS, please check our website (www.streamlinesoftware.net) for information on the status of our trial of this service.

Home Global setup Form independent translations setup Form Templates

General Users Licences PDF E-Mail SMS Fax Printer P

SMS settings



SMS program selection

☒ Use third party SMS Service for sending SMS messages

☐ Use Streamline MessageSaver® for sending SMS messages

SMS domain selection

SMS domain name

SMS Subject

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

Control Name	Control Description
<i>SMS program selection</i>	This group of option buttons is used to specify the service under which AutoDoc HSE will deliver SMS messages. Selecting <i>Use third party SMS Service for sending SMS messages</i> enables the <i>SMS domain selection</i> control group and disables the <i>AutoDoc HSE</i>

MessageSaver settings control group, whereas selecting *Use Streamline MessageSaver for sending SMS messages* disables the *SMS domain selection* control group and enables the *AutoDoc HSE MessageSaver settings* control group.

The Streamline MessageSaver service is an SMS gateway service that can deliver significant cost savings on SMS deliveries.

Under the *Use third party SMS Service for sending SMS messages* option, the correct format for SMS textual commands is:

<RecipientPhoneNumber>@<SMSDomainName>

...in the colour representing textual commands.

For example, a third-party SMS command may be:

0401700700@sms.thirdparty.com

AutoDoc HSE assesses any command in this format, and if the SMS domain name component matches the entry in the *SMS domain name* control on this tab, AutoDoc HSE sends the SMS message to the third party SMS provider with the recipient's number and preconfigured SMS message (as defined in the form setup E-Mail tab).

Under the *Use Streamline MessageSaver for sending SMS messages* option, the correct format for SMS textual commands is:

<RecipientPhoneNumber>@SMS

...in the colour representing textual commands.

For example, a MessageSaver SMS command may be:

0401700700@SMS

AutoDoc HSE recognises any command in this format, and sends the SMS message to the MessageSaver service with the recipient's number and preconfigured SMS message (as defined in the form setup E-Mail tab).

The default selection is *Use third party SMS Service for sending SMS messages*.

SMS domain name

Use this text control to enter the domain name of the third party SMS service provider. When AutoDoc HSE encounters an e-mail address command, the end of the

	e-mail address is compared to the text entered here. If the two match, AutoDoc HSE treats the e-mail address as a command to send an e-mail containing an SMS to the SMS service provider, rather than the e-mail specified in the form under which the job was processed.
<i>Account number</i>	<p>Use this text control to enter your MessageSaver account number.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Password</i>	<p>Use this text control to enter your MessageSaver password.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Default country code</i>	<p>Use this text control to enter the default country code for international dialling (for example, 61 for Australia).</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Area code prefix</i>	<p>Use this text control to enter the area code prefix. This enables AutoDoc HSE to recognise numbers which include an area code.</p> <p>For example, the area code <i>prefix</i> 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).</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>International Access Number</i>	<p>This control can be used, optionally, to specify an international access number.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Confirm Submission</i>	Use this checkbox to specify whether you require

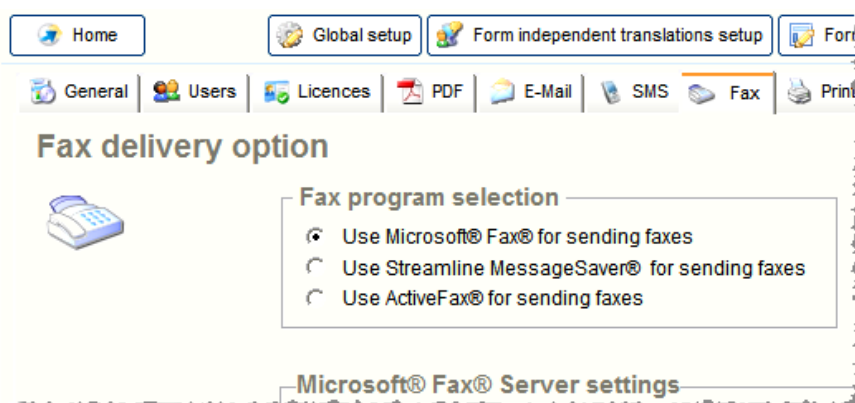
	<p>confirmation of job submission.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Confirm Successful Delivery</i>	<p>Use this checkbox to specify whether you require confirmation of successful job delivery.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Notify Transmission Errors</i>	<p>Use this checkbox to specify whether you require notification of any transmission errors.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Test Number Conversion</i>	<p>Use this text control, optionally, to enter a number to test MessageSaver's number conversion.</p> <p>We recommend that rather than using number conversion, correctly formed numbers should always be specified as textual commands. See the note on page 122 for details of correct MessageSaver number formats.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>
<i>Result</i>	<p>This display-only control shows the result of the conversion performed upon the number in <i>Test Number Conversion</i> control.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending SMS messages</i> option button is selected.</p>

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.



Before using Streamline Software's MessageSaver service for fax, please check our website (www.streamlinesoftware.net) for information on the status of our trial of this service.



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

Control Name	Control Description
<i>Fax program selection</i>	<p>This group of option buttons is used to specify the service under which AutoDoc HSE will deliver faxes. Selecting <i>Use Microsoft Fax for sending faxes</i> enables the <i>Microsoft Fax Server settings</i> control group and disables the <i>AutoDoc HSE MessageSaver settings</i> control group. Selecting <i>Use Streamline MessageSaver for sending faxes</i> disables the <i>Microsoft Fax Server settings</i> control group and enables the <i>AutoDoc HSE MessageSaver settings</i> control group. Selecting <i>Use ActiveFax for sending faxes</i> disables all other control groups.</p> <p>The <i>Use Microsoft Fax for sending faxes</i> 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 server installation of Microsoft Fax.</p> <p>The Streamline MessageSaver service is a fax gateway service that can deliver significant cost savings on fax deliveries.</p> <p>The default selection is <i>Use Microsoft Fax for sending</i></p>

	<i>faxes.</i>
<i>E-mail feedback (Microsoft SBS)</i>	<p>This control is part of the <i>Microsoft Fax Server settings</i> control group, and is disabled unless Microsoft Fax is the nominated fax service.</p> <p>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.</p>
<i>Attach fax to receipt</i>	<p>This control is part of the <i>Microsoft Fax Server settings</i> control group, and is disabled unless Microsoft Fax is the nominated fax service.</p> <p>Use this checkbox to specify that a copy of the fax transmission should be stored with the receipt for the transmission.</p>
<i>Optional Microsoft Fax Machine name</i>	<p>This control is part of the <i>Microsoft Fax Server settings</i> control group, and is disabled unless Microsoft Fax is the nominated fax service.</p> <p>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.</p>
<i>Dialling prefix</i>	<p>This control is part of the <i>Microsoft Fax Server settings</i> control group, and is disabled unless Microsoft Fax is the nominated fax service.</p> <p>This text control is used to enter a prefix that will be added to all outgoing fax numbers handled by AutoDoc HSE. This field could be used, for example, to dial 0 for an outside line.</p>
<i>Test Fax</i>	<p>This control is part of the <i>Microsoft Fax Server settings</i> control group, and is disabled unless Microsoft Fax is the nominated fax service.</p> <p>This button is used to test whether AutoDoc HSE can connect to a fax service.</p>
<i>Account number</i>	<p>Use this text control to enter your MessageSaver account number.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>

<i>Password</i>	<p>Use this text control to enter your MessageSaver password.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Default country code</i>	<p>Use this text control to enter the default country code for international dialling (for example, 61 for Australia).</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Area code prefix</i>	<p>Use this text control to enter the area code prefix. This enables AutoDoc HSE to recognise numbers which include an area code.</p> <p>For example, the area code <i>prefix</i> 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).</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>International Access Number</i>	<p>This control can be used, optionally, to specify an international access number.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Confirm Submission</i>	<p>Use this checkbox to specify whether you require confirmation of job submission.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Confirm Successful Delivery</i>	<p>Use this checkbox to specify whether you require confirmation of successful job delivery.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Notify Transmission Errors</i>	<p>Use this checkbox to specify whether you require notification of any transmission errors.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Test Number Conversion</i>	<p>Use this text control, optionally, to enter a number to test the number conversion result.</p>

	<p>We recommend that rather than using number conversion, correctly formed numbers should always be specified as textual commands. See the note on page 122 for details of correct MessageSaver number formats.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>
<i>Result</i>	<p>This display-only control shows the result of the conversion performed upon the <i>Test Number Conversion</i> control.</p> <p>This control is disabled unless the <i>Use Streamline MessageSaver for sending faxes</i> option button is selected.</p>

✕ Lite

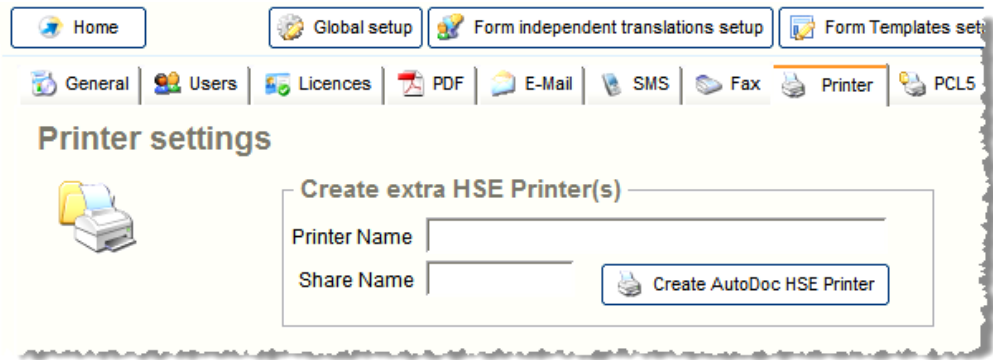
✕ Standard

✕ Server

✓ Enterprise

Printer

The Printer tab is part of the global setup view, and is used to create additional AutoDoc HSE printers, the creation of which facilitates more powerful handling of heavy print loads.



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

Control Name	Control Description
<i>Printer Name</i>	<p>Use this text control to enter the name of the new AutoDoc HSE printer.</p> <p>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 <code>copy <ID></code>, and the printer will not be created as a shared printer.</p>
<i>Share Name</i>	<p>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.</p> <p>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.</p>
<i>Create AutoDoc HSE Printer</i>	<p>Use this button to create a new AutoDoc HSE printer with the name specified. You will be prompted when the printer is installed.</p>

- * Lite
- ✓ Standard
- ✓ Server
- ✓ Enterprise

PCL5

The PCL5 tab is part of the global setup view, 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.
1. Output: specifying to where intercepted PCL data should be printed.

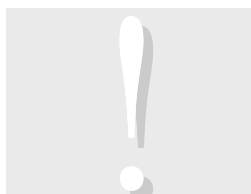
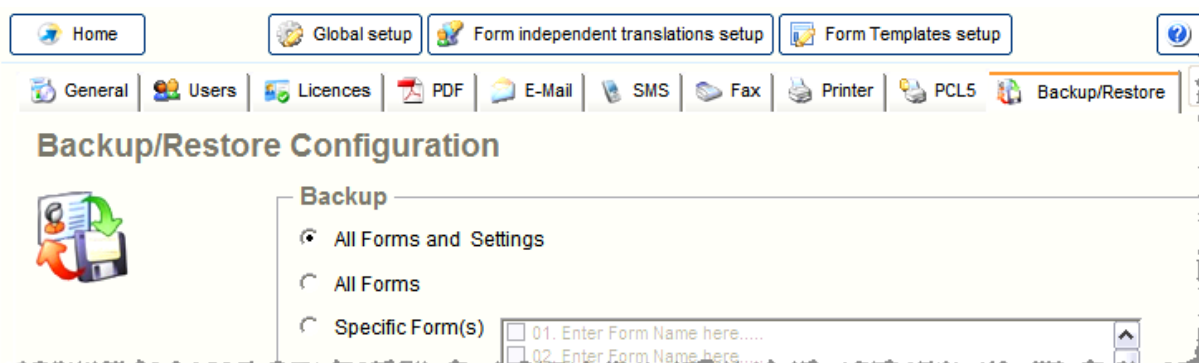
The following table provides detail for each of the controls in the PCL5 tab:

Control Name	Control Description
<i>Capture Port</i>	Use this drop down control to specify a port which should be redirected to AutoDoc HSE.
<i>Persistent</i>	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).
<i>Start Capture</i>	Use this button to activate the redirection of the specified port to AutoDoc HSE. You will be notified of the outcome.

<i>Number of characters to trim from input file</i>	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 initialisation or form feed characters that produce a blank page.
<i>RAW / PCL Printing</i>	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.

Backup/Restore

The Backup/Restore 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/Restore tab:

Control Name	Control Description
<i>Backup</i>	<p>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:</p> <ul style="list-style-type: none">▪ <i>All Forms and Settings</i>: backs up the configuration of all forms, as well as the global setup items (as displayed in the global setup view).▪ <i>All Forms</i>: backs up the configuration of all forms (but not the global setup items)▪ <i>Specific Form(s)</i>: backs up the configuration of selected forms (but not the global setup items). <p>See page 157 for specific details on what information is included in backups.</p>

<i>Specific Form(s)</i>	Use this checklist to select the forms to be backed up. This checklist is only available when the <i>Specific Form(s)</i> option button is selected.
<i>Backup Selected Settings</i>	<p>Use this button to begin the backup specified in the <i>Backup</i> 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:</p> <ul style="list-style-type: none"> ▪ <i>All Forms and Settings</i>: includes the text <code>Full Backup</code> in the filename. ▪ <i>All Forms</i>: includes the text <code>All Forms</code> in the filename. ▪ <i>Specific Form(s)</i>: includes the numbers of the selected forms in the filename.
<i>Restore previously saved settings</i>	<p>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.</p> <p>Backup files have a *.BCK file extension.</p> <p>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 <code>All Forms</code> backup, the global configuration will remain unchanged. Similarly, if you restore from a <code>Forms 3-5</code> backup, only forms 3-5 will be affected by the restore.</p>

Form independent translations setup

The Form independent translations setup view is accessed via the button of that name in 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 26.

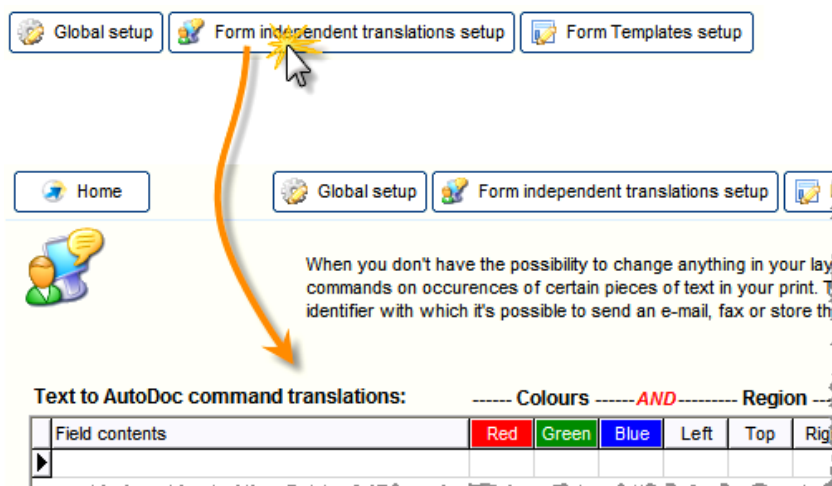


FIGURE 12 - accessing the translations view via the *Form independent translations setup* button.



'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 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 code = '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

Field contents	Red	Green	Blue	Translates to AutoDoc command
* 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).

Please note the important information about file paths on page 43. Please also 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 144, for valuable information on making the configuration process more simple.

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
<i>Paste Text / Colour /</i>	Use this button to paste information that has been

<i>Region</i>	copied from the Colours/words tab of the log view (see page 144 for more information).
<i>Field contents</i>	<p>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.</p> <p>Note that entries here:</p> <ul style="list-style-type: none"> ▪ are case-sensitive ▪ must represent the <i>entire</i> 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. <p>For example:</p> <ul style="list-style-type: none"> ▪ ABC in <i>Field contents</i> will result in 'abc' in a print job being ignored (because of case difference). ▪ ABC in <i>Field contents</i> 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 <i>Field contents</i> for the translation to be recognised, since it also exists in the print job as RGB 21,21,21). ▪ ABC ?????????? in <i>Control contents</i> 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 <i>Control contents</i> 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.
<i>Red</i>	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.

<i>Green</i>	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.
<i>Blue</i>	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.
<i>Left</i>	<p>Use this text control to enter the leftmost position of the text string specified in the <i>Field contents</i> control, measured in pixels from the left edge of the page.</p> <p>This is an optional control, and should only be used if using regions functionality.</p>
<i>Top</i>	<p>Use this text control to enter the topmost position of the text string specified in the <i>Field contents</i> control, measured in pixels from the top edge of the page.</p> <p>This is an optional control, and should only be used if using regions functionality.</p>
<i>Right</i>	<p>Use this text control to enter the rightmost position of the text string specified in the <i>Field contents</i> control, measured in pixels from the left edge of the page.</p> <p>This is an optional control, and should only be used if using regions functionality.</p>
<i>Bottom</i>	<p>Use this text control to enter the bottommost position of the text string specified in the <i>Field contents</i> control, measured in pixels from the top edge of the page.</p> <p>This is an optional control, and should only be used if using regions functionality.</p>
<i>Translates to AutoDoc HSE command</i>	<p>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 <i>Field contents</i> control), in combination with the RGB (and/or region) values. A maximum of 128 characters can be entered here.</p> <p>Note that entries here:</p> <ul style="list-style-type: none"> ▪ can be an e-mail address, fax number, end of page command (see page 127), language

abbreviation (see page 89), file path/name of a file to be attached (see page 26), or a filename of an overlay file to be included in PDF output (see page 154).

- 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 89 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 43.

+

Use this button to insert a new row into the translations table.

-

Use this button to delete a row from the translations table.

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 as such are typically found within the application by clicking 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.

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':

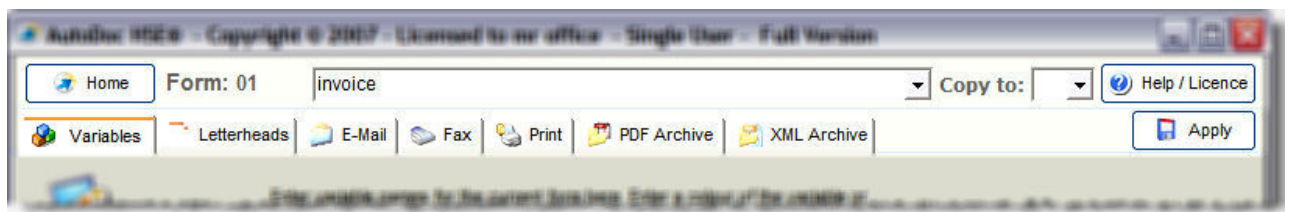
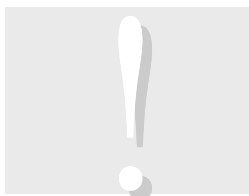


FIGURE 13 - showing the group of controls collectively known as the form setup header.



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 tab).

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

Control Name	Control Description
<i>Home</i>	Use this button to move from the form setup area back to the home page.
<i>Form:</i>	This control consists of two components: <ol style="list-style-type: none">1. a dynamic text label2. a drop down list The text label displays the number of the form

	<p>currently selected. In the areas of the form setup view which include language-specific sub-settings, the current language is also displayed here.</p> <p>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.</p> <p>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 <i>Display name</i> control of the E-mail tab.</p>
<i>Copy to:</i>	<p>This drop down list is used to specify a form to which the current form's configuration will be copied.</p> <p>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.</p> <p>Confirmation is requested before the form is copied.</p>
<i>Help/Licence</i>	<p>Use this button to move to the Help/Licence area (see page 161).</p>
<i>Tab strip</i>	<p>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 81).</p>
<i>Apply</i>	<p>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).</p>

Lite: 5

Standard: 5

Server: 20

Enterprise: 20

Variables

The Variables tab is part of the form setup view, and 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.

Field name	Red	Green	Blue	Left	Top	Right
Variable 1	1	1	1	0	0	0
Variable 2	2	2	2	0	0	0
Variable 3	3	3	3	0	0	0



As well as the 20 user-definable names available for variables 1-20, these 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%.



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.

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 144, for valuable information on making the configuration process more simple.

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:

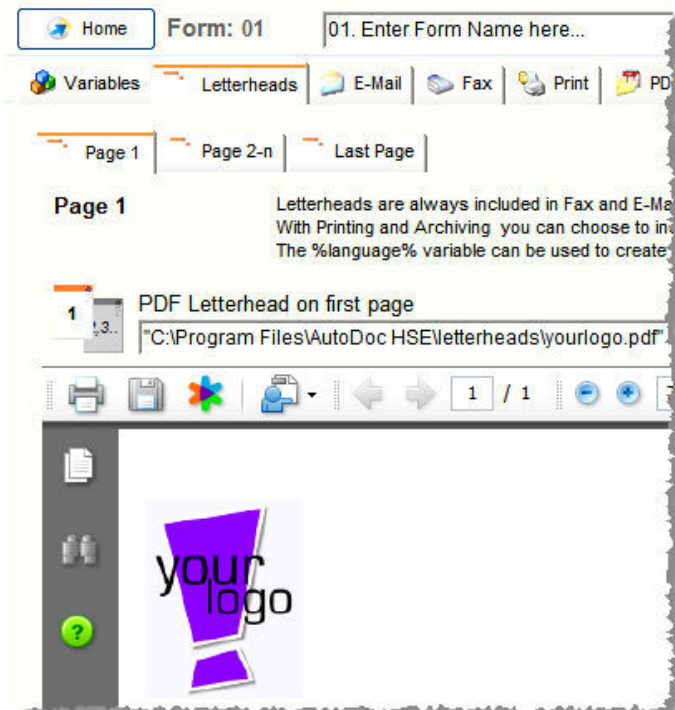
Control Name	Control Description
<i>Paste Colour/Region</i>	Use this button to paste information that has been copied from the Colours/words tab of the log view (see page 144 for more information).
<i>Field name</i>	<p>Use this column to specify the names by which the user-defined variables will be known, for the particular form you are currently defining.</p> <p>By default, variable names are 'Variable 1' through to 'Variable 20', 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.</p> <p>A variable cannot be given the same name as a pre-defined system variable, such as %username%.</p>
<i>Red</i>	<p>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.</p> <p>A minimum of 0 (no red) and a maximum of 255 (as much red as possible) are allowed.</p>

<i>Green</i>	<p>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.</p> <p>A minimum of 0 (no green) and a maximum of 255 (as much green as possible) are allowed.</p>
<i>Blue</i>	<p>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.</p> <p>A minimum of 0 (no blue) and a maximum of 255 (as much blue as possible) are allowed.</p>
<i>Left</i>	<p>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.</p> <p>Note that an entry here has no effect unless the values for the <i>Red</i>, <i>Green</i>, and <i>Blue</i> controls are all 0.</p>
<i>Top</i>	<p>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.</p> <p>Note that an entry here has no effect unless the values for the <i>Red</i>, <i>Green</i>, and <i>Blue</i> controls are all 0.</p>
<i>Right</i>	<p>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.</p> <p>Note that an entry here has no effect unless the values for the <i>Red</i>, <i>Green</i>, and <i>Blue</i> controls are all 0.</p>
<i>Bottom</i>	<p>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.</p> <p>Note that an entry here has no effect unless the values for the <i>Red</i>, <i>Green</i>, and <i>Blue</i> controls are all 0.</p>
<i>Attach</i>	<p>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 <i>Header</i> column.</p> <p>By checking a checkbox in this column, you are instructing AutoDoc HSE to include the associated variable as file content in any of the non-PDF e-mail</p>

	<p>file types specified in the E-Mail tab.</p> <p>If a variable has a cleared <i>Attach</i> checkbox, that variable is ignored for creating XML-type files.</p> <p>See page 90 for more details on file attachments.</p>
<i>Header</i>	<p>Use this column of checkboxes to specify which variables are header items in file output. Any variable for which the <i>Attach</i> checkbox is checked, will be treated as a header item if the <i>Header</i> checkbox is checked, and a detail item if the <i>Header</i> checkbox is cleared.</p>

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.

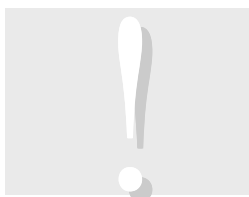


If you have a standard letterhead you would like to apply, you can:

- 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 pages 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 154 for more information on overlays. Another feature that provides more flexibility for the application of letterheads to hard copy output is described in the "Introducing indicators" section starting on page 108.

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.

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

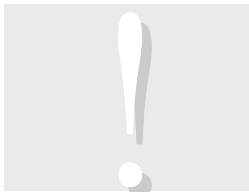
Control Name	Control Description
<i>PDF Letterhead...</i>	<p>Use this text control to enter the file path and filename of the PDF letterhead to include for the particular page group (first/subsequent/last) for this particular form. You can either enter text directly into the field (in which case the 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.</p> <p>Note the important information regarding file locations on page 42.</p> <p>A valid selection is displayed in the preview pane at the bottom of the view. This preview pane is an embedded PDF viewer.</p>
<i>Rotate:</i>	<p>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.</p>

E-Mail

The E-Mail 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.

The screenshot shows the 'E-Mail' tab in the AutoDoc HSE configuration interface. At the top, there's a 'Form: 01/EN' header with a dropdown menu. Below this is a navigation bar with tabs: Variables, Letterheads, E-Mail (selected), Fax, Print, PDF Archive, and XML Archive. The main area contains several configuration options: 'CC' and 'BCC' dropdown menus set to 'NO CC' and 'NO BCC'; 'Include attachments' checkbox; file format selection buttons for PDF, XLS, XLT, TXT, and XML; language selection buttons for English (EN), Français (FR), Deutsch (DE), Español (ES), Italiano (IT), and Português (PT); 'Subject' field with a template string '%formname% for %account name%, %tot'; 'Message file' dropdown set to 'Text/HTML'; 'Message text' field with a template string 'Please find attached your %formname% for %total%, falling due on %d'; 'SMS message' field set to '0 Characters'; 'Send E-Mail using user profile' checkbox; 'E-Mail Address override' and 'E-Mail Program override' dropdowns; 'Send MAPI E-Mail immediately' checkbox; and 'Extra attachments' section with an 'Attach PDF' checkbox.

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 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) that will be seen in the body of the e-mail.

The E-Mail tab also includes the following functionality:

- Language 'sub-forms'

- XML-type file attachments based on print job variable content
- Extra file attachments
- SMS messaging
- Digital signatures



Language 'sub-forms'

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 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.

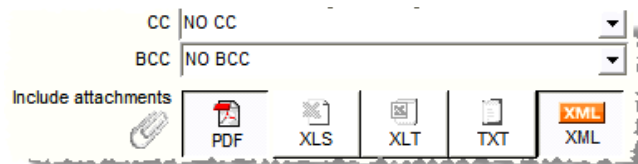
AutoDoc HSE does not actually perform any language translation; it simply provides an area to record the same configuration, but using different languages (that is, the user creating the configuration performs the translation as part of the configuration). Because no actual translation is taking place 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 101) 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 93 for more detail on the attachment types available in your version of AutoDoc HSE):



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 43.

SMS messaging

SMS messages can be delivered to a recipient's phone number, as specified in an SMS textual command (see page 62 for more information on SMS commands). This tab includes a control in which an SMS message can be preconfigured for such deliveries.

- * Lite
- * Standard
- * Server
- ✓ Enterprise

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.

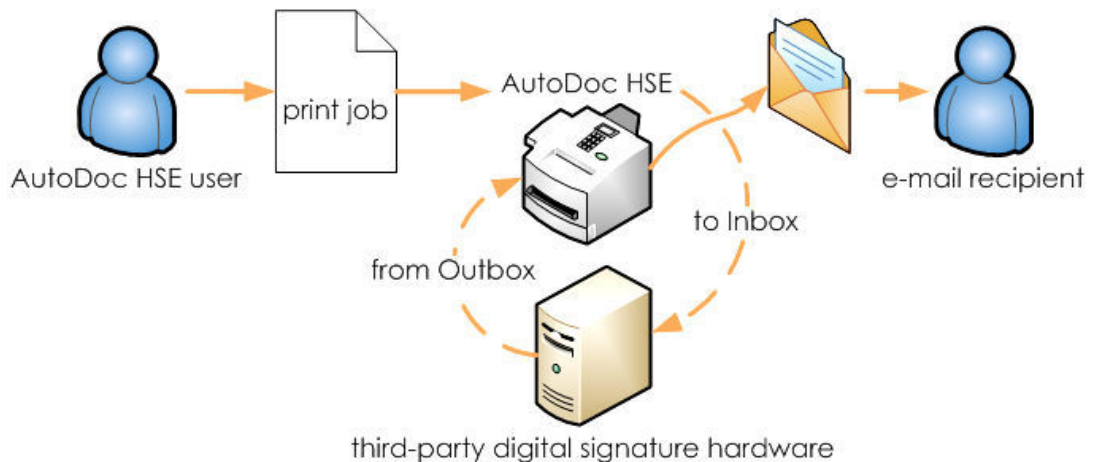


FIGURE 15 - the digital signature process.

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 58 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 tab:

Control Name	Control Description
CC	<p>Use this drop-down list to specify an AutoDoc HSE user to whom a CC (Carbon Copy) e-mail will be sent.</p> <p>In addition to all users created in the Users tab, the following possible pre-set CC entries exist in the drop-down list:</p> <ul style="list-style-type: none"> ▪ 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). <p>Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons.</p>
<i>BCC to User</i>	<p>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).</p> <p>In addition to all users created in the Users tab, the following possible BCC entries exist in the drop-down list:</p> <ul style="list-style-type: none"> ▪ 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

	<p>Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.</p> <ul style="list-style-type: none"> ▪ 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). <p>Standard e-mail addresses can also be entered in this control, with multiple addresses separated by semicolons.</p>
<p><i>Include attachments</i></p>	<p>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.</p> <p>The other possible formats are used to include XML (or XML-type) attachments based on the header/detail definitions specified for variables in the form setup Variables tab.</p> <p>Note that some file formats are only allowed in certain versions of AutoDoc HSE.</p> <p>Multiple types can be attached to the one e-mail.</p>
<div data-bbox="236 804 831 1008"> <p>Lite: PDF</p> <p>Standard: PDF</p> <p>Server: PDF, XLS, XLT, TXT</p> <p>Enterprise: PDF, XLS, XLT, TXT, XML</p> </div>	<p>Use this drop-down list to specify which AutoDoc HSE user profile should be used to send the e-mail.</p> <p>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).</p> <p>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.</p> <p>In addition to all users created in the Users tab, the following possible <i>Send e-mail using user profile</i> entries exist in the drop-down list:</p> <ul style="list-style-type: none"> ▪ 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

	<p>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.</p> <ul style="list-style-type: none"> ▪ DEFAULT USER – specifies that the profile of the Default User (as specified in the Users page) will be used to send e-mails.
<i>E-Mail Address override</i>	<p>This drop-down list is usually used for testing purposes only.</p> <p>If an override 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.</p> <p>Note that an override 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 override.</p> <p>In addition to all users created in the Users tab, the following possible <i>Override E-Mail address</i> entries exist in the drop-down list:</p> <ul style="list-style-type: none"> ▪ NO OVERRULE – specifies that an override 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). <p>Standard e-mail addresses can also be entered in this control.</p>
<i>E-Mail Program</i>	<p>Use this drop-down list to specify a form-specific e-mail protocol to be applied. This control provides a</p>

<i>override</i>	<p>means of overriding the default e-mail protocol specified in the global setup E-mail tab.</p> <p>The possible entries include:</p> <ul style="list-style-type: none"> ▪ NO OVERRIDE – 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.
<i>Send MAPI E-mail immediately</i>	<p>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.</p> <p>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.</p>
<i>Request read receipt</i>	<p>Use this checkbox to specify that e-mails should be created with a read receipt request.</p>
<i>Language tabs</i>	<p>Use these tabs to open the 'sub-forms' within the current form. See page 89 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.</p>
<i>Subject</i>	<p>Use this text control to enter, optionally, the subject heading that will appear on e-mails created with this form.</p> <p>All the AutoDoc HSE variables can be used in this control. For example, you could enter the subject heading as:</p> <p>%doctype% for account %accnumber% from %company%.</p> <p>...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</p>

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 27 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.

Message file

Use this text control to specify, optionally a file, the contents of which will be used as the e-mail's body.

If a file is not specified here, the message body can be manually entered in the *Message text* control.

You can enter the file 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 a text file is specified, the e-mail will be sent in plain text format.
- If an HTML file is specified, the e-mail will be sent in HTML format.
- If an HTML file is specified, any other files specified in the HTML itself (for example, images) will be included in the HTML format, provided these files are accessible to AutoDoc HSE. Files can be accessible to AutoDoc HSE either locally, via a network resource, online, or by including the file as an attachment.

In the case where files are included as extra attachments (see the definition of the *Extra attachments* control on page 98 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"
```

	<p>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).</p> <p>Text or HTML files specified in this control can include variables. For example, the HTML file could include the following line of code:</p> <pre>
Please find attached your invoice for %total%.
</pre> <p>Note the important information regarding file locations on page 42.</p>
<i>Message text</i>	<p>This control performs two functions. It can be used:</p> <ul style="list-style-type: none"> ▪ to display the content of the file specified in the <i>Message file</i> control, or, ▪ if no <i>Message file</i> is specified, to enter, optionally, the main e-mail body text that will appear in e-mails created with this form. Text can be entered as plain text to be sent in plain text format, or as HTML to be sent in HTML format. <p>All the AutoDoc HSE variables can be used in this control (in plain text or HTML content). For example, you could include the following in the message:</p> <p>Please find attached your %doctype% of %docdate%. If you have any queries, please don't hesitate to contact me on %officephone%.</p> <p>...where %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 an e-mail with the text 'Please find attached your Tax Invoice of 30/04/2005. If you have any queries, please don't hesitate to contact me on 1234 5678.'</p> <p>For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 27 or, alternatively, press the F1 keyboard function key.</p>
<i>SMS Message</i>	<p>Use this control to specify, optionally, an SMS message to be sent when the document being processed under</p>

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 61 for more information on using SMS messaging.

Extra attachments

Use this 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

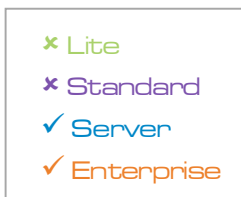
...this would result in the 'specials.pdf' file, which resides in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being included as an attachment in the e-mail.

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* control on page 96 for more information on referencing by Content IDs).

Files can be 'dragged and dropped' into this control.

	<p>This copies the filename and path to the control, leaving the original file in its original location.</p> <p>Note the important information regarding file locations on page 42.</p>
<i>Attach PDF attachments to the Main PDF</i>	<p>Use this checkbox to specify that any PDF files listed in the <i>Extra Attachments</i> 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.</p> <p>Note the important information regarding file locations on page 42.</p>
<i>Display name</i>	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.
<i>Title</i>	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.
<i>Author</i>	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.
<i>Subject</i>	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.
<i>Open Password</i>	<p>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.</p> <p>The password specified here cannot be the same as the password specified as the <i>Owner Password</i>.</p>
<i>Owner Password</i>	Use this text control to specify a password to be

- ✖ Lite
- ✖ Standard
- ✓ Server
- ✓ Enterprise



	<p>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.</p> <p>The password specified here cannot be the same as the password specified as the <i>Open Password</i>.</p>
<i>Encryption</i>	Use this drop down list to specify the encryption level for any secured PDF e-mail attachments created by AutoDoc HSE for this form.
<i>Print the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, can still print the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
<i>Copy text and graphics from the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, can still copy text and graphics from the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
<i>Add comments to the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, 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.
<i>Change the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, 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.

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.

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.

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

Control Name	Control Description
<i>Fax number override</i>	<p>This drop-down list is usually used for testing purposes only.</p> <p>If an override 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</p>

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 OVERRULE – 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.

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



	<p>Default User will be treated as the CREATOR/OWNER for the fax.</p> <ul style="list-style-type: none"> ▪ DEFAULT USER – specifies that the profile of the Default User (as specified in the Users page) will be used to send faxes.
<i>Language tabs</i>	Use these tabs to open the 'sub-forms' within the current form. See page 89 for more detail on the language tabs.
<i>Cover page</i>	<p>Use this text control to enter, optionally, the filename of a fax cover page to be used with this form's fax settings.</p> <p>Note that the cover page name must be entered without the file extension and without the file path. For example, the file:</p> <p>C:\Documents and Settings\Jeff Buckley\My Documents\Fax\Personal Coverpages\Cover Page.cov</p> <p>...would be entered:</p> <p>Cover Page.cov</p> <p>The location of the file is specified using the <i>Fax Cover Page</i> control group.</p>
<i>Cover Page Designer</i>	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'.
<i>Fax Cover Page</i>	This group of option buttons is used to specify the location of the cover page specified in the <i>Cover page</i> control.
<i>To Company</i>	<p>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 <i>To Company</i> and <i>Attn</i> controls are merged to populate the fax service's 'To' value.</p> <p>All the AutoDoc HSE variables can be used in this control. For example, you could enter the company as:</p> <p>%acname%</p> <p>...where %acname% 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</p>

	name specified in AutoDoc HSE's <i>Attn</i> text control.
<i>Attn</i>	<p>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 <i>To Company</i> and <i>Attn</i> controls are merged to populate the fax service's 'To' value.</p> <p>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'.</p>
<i>Subject</i>	<p>Use this text control to specify, optionally, the text that will be used as the fax's subject heading.</p> <p>All the AutoDoc HSE variables can be used in this control. For example, you could enter the subject as:</p> <p>%doctype% for account %accnumber% from %company%.</p> <p>...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.'</p> <p>For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 27 or, alternatively, press the F1 keyboard key.</p>
<i>Cover page text</i>	<p>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.</p> <p>All the AutoDoc HSE variables can be used in this control. For example, you could enter the cover page text as:</p> <p>Please find following your %doctype% of %docdate%. If you have any queries, please don't hesitate to contact me on %officephone%.</p>

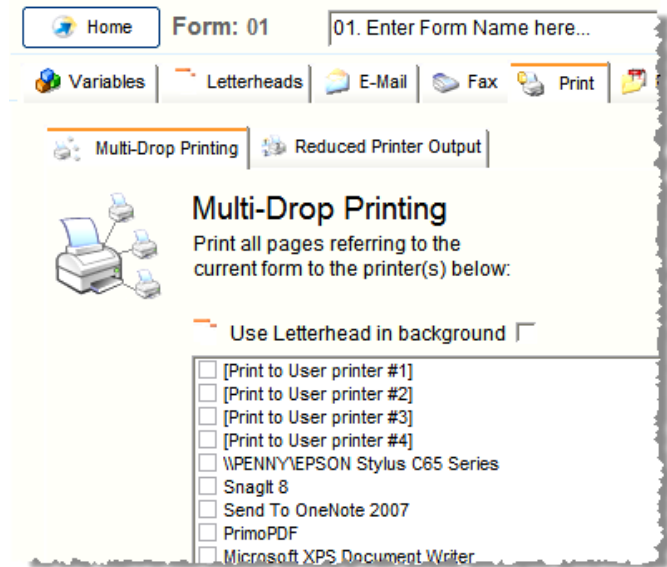
	<hr/> <p>Kind Regards,</p> <p>%fullname%.</p> <p>...where %acccontact%, %doctype% and %docdate% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc HSE printer could then result in an e-mail with the text:</p> <p>'Please find following your Tax Invoice of 30/04/2005. If you have any queries, please don't hesitate to contact me on 1234 5678.</p> <p>Kind Regards,</p> <p>Peter McKenzie.'</p> <p>For a complete list of the pre-defined variables available, see the section entitled "Pre-defined system variables" on page 27 or, alternatively, press the F1 keyboard key.</p> <hr/>
<p><i>Send fax</i></p>	<p>Use this option button group to specify the time at which the fax should be sent.</p> <p>This control group is not applicable if MessageSaver is the nominated fax service.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> ▪ <i>Now</i> – 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. ▪ <i>At:</i> – specifies that the fax will be sent to your fax service with a scheduled send time as specified in the <i>hh:mm</i>: text control. ▪ <i>Current time +</i> – 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 <i>hh:mm</i>: text control. ▪ <i>Discount period</i> – 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. <hr/>
<p><i>hh:mm</i></p>	<p>Use this text control to enter a time.</p> <hr/>

	<p>This value can be used in conjunction with two of the option buttons in the <i>Send fax</i> control group, to send faxes at a specific time, or a set length of time after they are processed.</p> <p>The time must be entered in '24-hour clock' notation, and can be from 00:00 (midnight), to 23:59.</p> <p>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.</p>
<i>Priority</i>	<p>Use this option button group to specify what priority should be assigned to faxes created under this form.</p> <p>This control is not applicable if MessageSaver is the nominated fax service.</p>
<i>Extra PDF attachments</i>	<p>Use this control to specify the paths and filenames of any extra PDF files to be appended to faxes created via this form.</p> <p>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:</p> <p><code>C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf</code></p> <p>...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.</p> <p>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.</p> <p>Note that only PDF files can be appended to faxes using this control. Also note the important information regarding file locations on page 42.</p>

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 provides two methods of printing to serve two different purposes. The first is to print on an inclusive basis, whereby all pages in a document which are processed by the form in question are printed as a hard copy (including an optional 'multi-drop' to multiple printers). The second method prints on an exception basis – this method prints hard copies of pages for this form which are not processed by an external delivery method (e-mail or fax).

These two functions are separated into sub-tabs, called Multi-Drop Printing, and Reduced Printer Output, respectively. Note that the availability of printers under these functions is determined by whether the additional AutoDoc HSE user service is running (see page 20 for more information on the user service).



If you use a printer with multiple trays, and want to print to different trays of that printer using AutoDoc HSE, we recommend that you install a copy of the printer for each of the trays to which you will print. Each of the printer copies can then be specified separately as destination printers for AutoDoc HSE, or in combination with others, for multi-drop and/or exception based printing. As always, we recommend testing your configuration before operating in a production

environment (for example, focusing on how portrait/landscape settings for documents and printers interact).

Introducing indicators

Indicators are a different kind of command that is recognised by AutoDoc HSE. Rather than being document-based, or translation-based, an indicator is located within the properties of a printer to which AutoDoc HSE directs print jobs. A form number added to the AutoDoc HSE printer's comments property (as per the example in Figure 9 on page 40) is type of indicator, but there are others.

For example, the Letterheads tab provides the means of including a specific letterhead configuration on a form-by-form basis. The Print tab allows you to specify whether this letterhead should be included in hard copy output (see Figure 16). However, you may wish, for example, to include the letterhead on one hard copy output and not on another. Indicators provide the means of achieving this configuration.

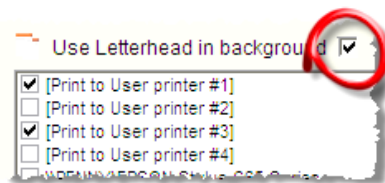
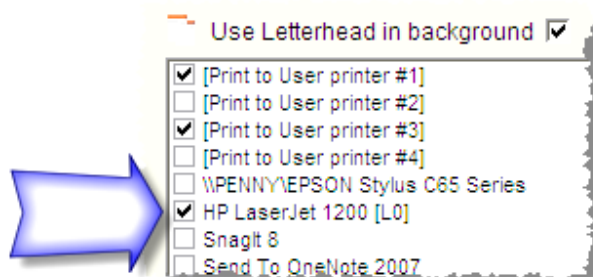


FIGURE 16 – showing the checkbox to specify whether letterheads should be applied to *all* hard copy output for the form in question.

In this case, an indicator is created by adding a suffix to a printer name. To override the letterhead setting specified in the *Use Letterhead in background* checkbox, the following suffixes can be used:

- [L0] – specifies that the letterhead should not be used
- [L1] – specifies that the letterhead should be used.

For example, if you specify that the letterhead should be used, using the *Use Letterhead in background* checkbox, but want a particular HP LaserJet 1200 printer *not* to produce the letterhead, you would rename the printer and add the [L0] suffix. The printer would then appear as follows (note the suffix in the printer name):



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 17), 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.

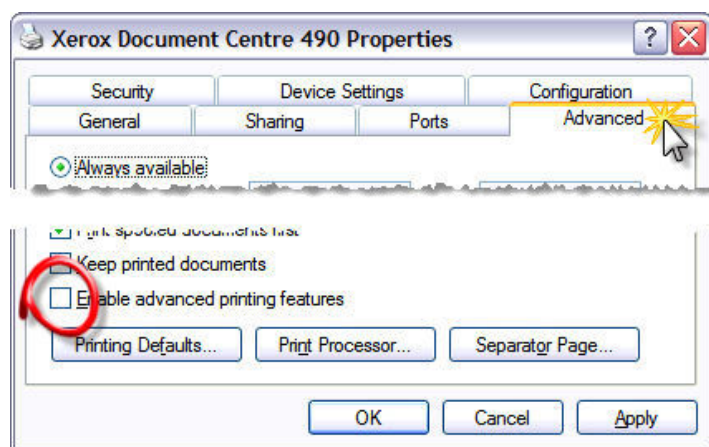


FIGURE 17 - the *Enable advanced printing features* checkbox.

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

Control Name	Control Description
<i>Multi-Drop Printing</i>	<p>Use this checklist 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.</p> <p>The printers available in the list will be determined by whether the AutoDoc HSE user service is running (see</p>

	<p>page 17 for more details on the user service):</p> <ul style="list-style-type: none"> ▪ If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed. ▪ If the service is running, all printers, including network printers, which are accessible to the machine on which AutoDoc HSE is installed will be listed. <p>“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.</p>
<i>Use letterhead in background</i>	<p>Use this checkbox to specify whether any letterheads selected in the Letterheads tab should be included in the multi-drop printouts.</p>
<i>Copy #1-3</i>	<p>Use these text controls to specify, optionally, watermarks to be applied to the print jobs under this form. The filename and path of the watermark file can be entered directly into the control (enclosed in quotation marks), or selected using the browse button to the right of the control.</p> <p>Note the important information regarding file locations on page 42.</p> <p>Three separate watermarks can be specified for each form. The association between which watermark should occur on which print job, is specified via printer name indicators (see page 108 for an introduction to indicators).</p> <p>For example, if the watermark specified in the copy 2 control is to be applied to print jobs using an HP LaserJet 1200 printer, the printer should be renamed to include the following indicator suffix:</p> <p>[c2]</p> <p>...where the ‘c’ refers to a ‘copy’ control, and the ‘2’ denotes the specific copy control.</p>

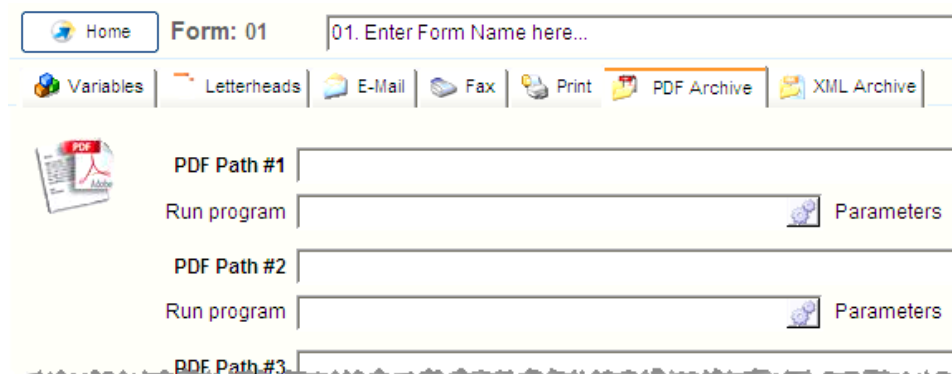
	<p>Note that indicators can include a combination of letterhead and watermark indicators (for example, [L0c3]).</p>
<i>Extra PDF files to add to the print</i>	<p>Use this control to specify the paths and filenames of any extra PDF files to be appended to hard copies created via this form, for multi-drop printing.</p> <p>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:</p> <pre>C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf</pre> <p>...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.</p> <p>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.</p> <p>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 42.</p>
<i>Reduced Printer Output</i>	<p>Use this checklist to specify, optionally, the printer(s) to which print jobs will be directed if no fax number or e-mail address (or a translation representing such a command) exists. Note that this test is applied on a page-by-page basis – that is, if a printer is selected here, any pages in the source document that do not include a textual command e-mail address or fax number will be sent to this printer.</p> <p>The printers available in the list will be determined by whether the AutoDoc HSE user service is running (see page 17 for more details on the user service):</p> <ul style="list-style-type: none"> ▪ If the service is not running, only those printers which are local to the machine on which AutoDoc HSE is installed will be listed. ▪ If the service is running, all printers, including network printers, which are accessible to the machine on which AutoDoc HSE is installed will be listed. <p>"Print to User printer #..." options are also available.</p>

	<p>These options specify the printer(s) 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.</p>
<i>Use letterhead in background</i>	<p>Use this checkbox to specify whether any letterheads selected in the Letterheads tab should be included in the exception-based printouts for this form.</p>
<i>Extra PDF files to add to the print</i>	<p>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 exception-based printing.</p> <p>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:</p> <p>C:\Documents and Settings\%username%\My Documents\%company%\specials.pdf</p> <p>...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.</p> <p>Note the important information regarding file locations on page 42.</p> <p>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.</p> <p>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 42.</p>

PDF Archive

The PDF 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 archive function saves a PDF 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 PDF 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%\%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 42 for important information regarding file locations.

- ✖ Lite
- ✖ Standard
- ✖ Server
- ✓ Enterprise

Third-Party Document Management

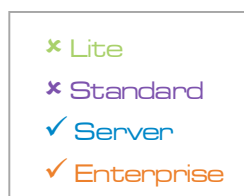
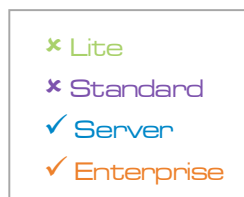
The PDF Archive functionality also facilitates the use of a third-party application to provide application-specific functionality to the archive process. Each form allows the optional nomination of a third-party application, together with run-time parameters to be passed to this application.

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

Control Name	Control Description
<i>PDF Path #1-3</i>	<p>Use these text controls to enter the file path and name of the PDF archive file.</p> <p>Please note the important information about file paths on page 43.</p> <p>All the AutoDoc HSE variables can be used in this control.</p> <p>Any specified path and filename that does not exist will be created by AutoDoc HSE as part of the archive process.</p> <p>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:</p> <pre>c:\clients\%accname%\correspondence\%doctype% e\s\%yyyy%mm%dd% %fullname%.pdf</pre> <p>...where %accname% and %doctype% are user-defined variables. Such an archive entry could result in a file name and path as follows:</p> <pre>c:\clients\ABC Automotive\correspondence\Tax Invoices\20050430 Peter McKenzie.pdf</pre> <p>However, if the variable %accname% has not been used in the source document, the path would be constructed as:</p> <pre>c:\clients\correspondence\Tax Invoices\20050430 Peter McKenzie.pdf</pre> <p>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</p>



	<p>as an AutoDoc HSE user, the job is treated as being from the Default User, and that profile is used instead.</p> <p>For a complete list of the pre-defined variables available, see the section entitled “Pre-defined system variables” on page 27 or, alternatively, press the F1 keyboard key.</p> <p>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.</p>
<i>Use letterhead</i>	Use these checkboxes to specify whether any letterheads selected in the Letterhead tab should be included in the archive PDF file for this form, for the PDF (1-3) path specified.
<i>Overwrite PDF</i>	These checkboxes determine AutoDoc HSE’s behaviour when the specified archive file name and path already exist. 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.
<i>Run program</i>	<p>Use these controls (together with the associated browse buttons) to specify, optionally, a third-party application’s executable (*.EXE) file to be invoked by AutoDoc HSE to handle additional document management tasks.</p> <p>These controls are used in conjunction with any parameters specified in the <i>Parameters</i> controls.</p> <p>Please note the important information about file paths on page 43.</p>
<i>Parameters</i>	<p>Use these controls to specify any parameters required by any third-party applications specified in the associated <i>Run program</i> controls.</p> <p>The %pdf% variable can be used in these controls to represent the name of the file created in the associated <i>PDF Path</i> controls, enabling the filename to be passed as a parameter to the application(s) being invoked.</p>
<i>Title</i>	Use this text control to specify a document title to be included in the PDF document properties for archived files using this form.
<i>Author</i>	Use this text control to specify an author to be included in the PDF document properties for archived files using



	this form.
<i>Subject</i>	Use this text control to specify a document subject to be included in the PDF document properties for archived files using this form.
<i>Keywords</i>	Use this text control to specify keywords to be included in the PDF document properties for archived files using this form.
<i>Open Password</i>	<p>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.</p> <p>The password specified here cannot be the same as the password specified as the <i>Owner Password</i>.</p>
<i>Owner Password</i>	<p>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.</p> <p>The password specified here cannot be the same as the password specified as the <i>Open Password</i>.</p>
<i>Encryption</i>	Use this drop down list to specify the encryption level for any secured PDF archive files created under this form.
<i>Print the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, can still print the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
<i>Copy text and graphics from the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, can still copy text and graphics from the file. If the checkbox is cleared, such a user cannot perform this operation with the file.
<i>Add comments to the PDF file</i>	Use this checkbox to specify that a reader of secured PDF attachments created under this form, who cannot supply the owner password, 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, 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.

- * Lite
- * Standard
- * Server
- ✓ Enterprise

XML Archive

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

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.

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\%acname%\correspondence\%doctype%\yyyy%mm%dd%
%fullname%.xml
```

...where %acname% 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 42 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
<i>XML Path #1-3</i>	<p>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).</p> <p>If AutoDoc HSE is instructed to create an XML-type file which already exists, it will overwrite the existing file.</p> <p>Please note the important information about file paths on page 43.</p> <p>All the AutoDoc HSE variables can be used in this control.</p> <p>Any specified path and filename that does not exist will be created by AutoDoc HSE as part of the archive process.</p> <p>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:</p> <pre>c:\clients\%accname%\correspondence\%doctype% e\s\%yyyy%mm%dd% %fullname%.txt</pre> <p>...where %accname% and %doctype% are user-defined variables. Such an archive entry could result in a file name and path as follows:</p> <pre>c:\clients\ABC Automotive\correspondence\Tax Invoices\20050430 Peter McKenzie.txt</pre> <p>However, if the variable %accname% has not been used in the source document, the path would be constructed as:</p> <pre>c:\clients\correspondence\Tax Invoices\20050430 Peter McKenzie.txt</pre> <p>Any user-based variables (such as %fullname%) are</p>

	<p>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.</p> <p>For a complete list of the pre-defined variables available, see the section entitled “Pre-defined system variables” on page 27 or, alternatively, press the F1 keyboard key.</p> <p>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.</p>
<i>Run program</i>	<p>These controls behave in the same manner as their counterparts for PDF Archiving (see the control definitions on page 115).</p>
<i>Parameters</i>	<p>These controls behave in the same manner as their counterparts for PDF Archiving (see the control definitions on page 115).</p> <p>The %xml% variable can be used in these controls to represent the name of the file created in the associated <i>XML Path</i> controls, enabling the filename to be passed as a parameter to the application(s) being invoked.</p>



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?

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 39, 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 in the following formats:
 - `<number>@SMS` – is recognised as a MessageSaver SMS command when MessageSaver is the chosen SMS service.
 - `<number>@<SMS domain name as per global setup SMS tab>` – is recognised as a third party SMS command when a third party SMS service provider has been chosen.



Note that for MessageSaver fax or SMS textual commands, numbers should be in the following format:

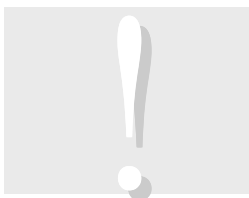
```
+<country Code><Area Code without Leading zero><local number>
```

For example, a fax sent within Melbourne, Australia, may have the number, 96969696, but under MessageSaver this number should be specified as +61396969696.

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 tab of the form setup area (see page 99).
- 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 154 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 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 127.



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 39 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.

- 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 127 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 form 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 'ABCAutomotive'.

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, 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 '%acname%' 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\%acname%.pdf, where '%acname%' 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, creating 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 (using 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).

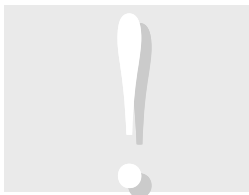
If this behaviour does not suit your purposes, you can force a break in the print run. This will result in the two pages being converted to two separate output files, which are contained in two separate deliveries (that is, two e-mails each containing a PDF), and each able to store and use their own 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 'templated' 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 39 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 18 – 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).
- 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

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.

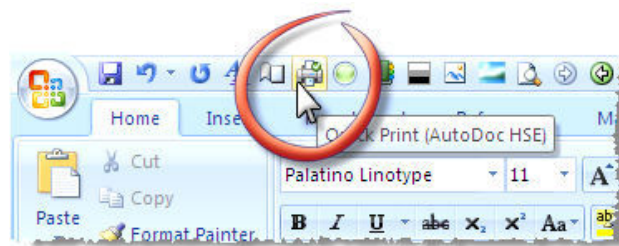


FIGURE 19 – printing to AutoDoc HSE using a toolbar 'Print' button.

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:

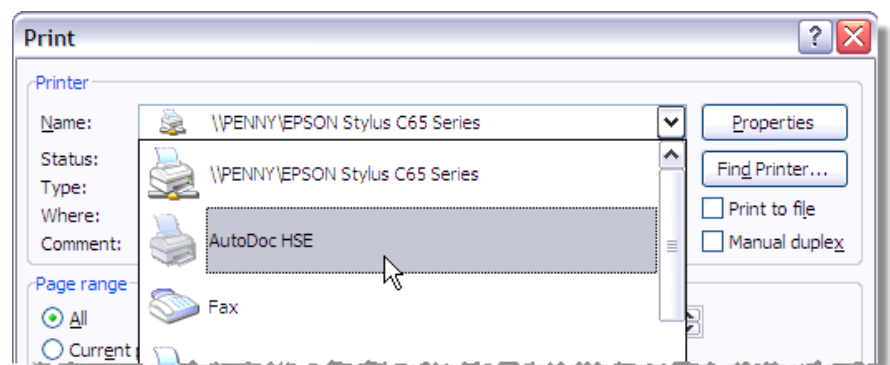


FIGURE 20 – selecting an AutoDoc HSE printer from the list of installed printers, in this case, in Microsoft Word.

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 user (see the sections starting on page 146 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.

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 42 for important information on file locations).
- 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.

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).

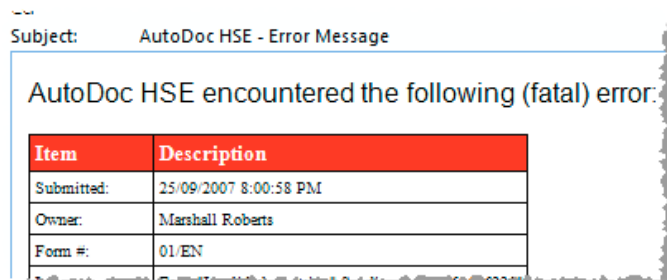


FIGURE 21 - an e-mail from AutoDoc HSE, informing the administrator of a fatal error.

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 chapter 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 122.
- Check that your document content is in line with the Recommendations set out on page 127, and see page 42 for important information on file locations

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 39 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 124 for more details on processing rules).

- Check the Processing rules on page 123 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 starting on page 127, and the “Notes on third-party applications” on page 129.
- 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 26 and 74 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 42.
- 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 55, 85, 108, 154).

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.



Logs, extras, system files, help & licence

The AutoDoc HSE log provides a useful tool for tracking deliveries and for troubleshooting. System files (of which the log is one) can also include temporary copies of delivered documents, as well as files used exclusively by AutoDoc HSE for its own purposes.

This chapter details the functionality of the AutoDoc HSE log and system files, as well as a discussion of 'extra' options available:

- The AutoDoc HSE log
- AutoDoc HSE client viewers
- AutoDoc HSE PDF Printer/Scanner
- Creating a "mailback" PDF converter
- Using overlays
- System files
- Help & licence

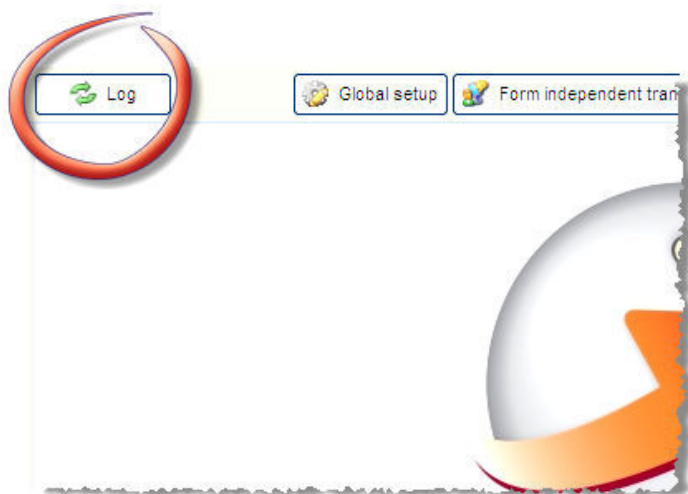
But wait, there's more...

So far, this manual has focused on the configuration of the AutoDoc HSE application, and the way the AutoDoc HSE virtual printer processes print jobs. There are more, very useful components in the AutoDoc HSE package:

- The main log – which is part of the AutoDoc HSE application, and lists all jobs processed by AutoDoc HSE.
- AutoDoc HSE client viewers – which are separate applications which allow individual users to view a log record of their own jobs, and also provide the following functionality:
 - 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.

The AutoDoc HSE main log

The main log is accessible via the *Log* button on the AutoDoc HSE home screen:



The AutoDoc HSE log lists every document sent to AutoDoc HSE for which AutoDoc HSE has attempted to produce output (e-mailed, faxed, archived, SMS messaged, or printed).

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 is 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).

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
- 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 nine 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 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.

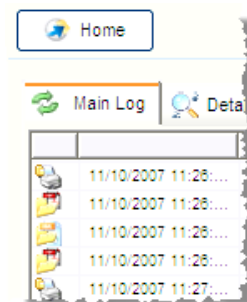
By default, the log records are sorted in the order they were processed.

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 146) 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:

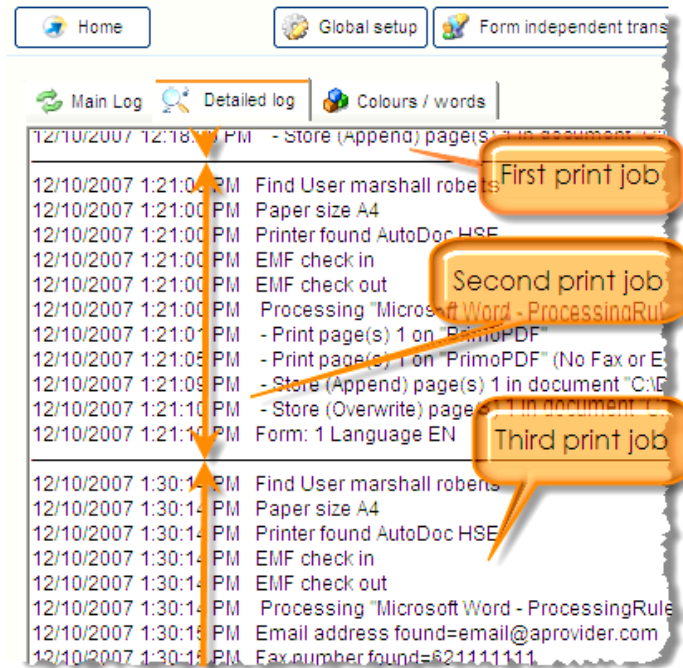
Control Name	Control Description
<i>Clear Log</i>	This button clears all records from the main log. You will be prompted to confirm your choice, and given the opportunity to save a copy of the current log (see the section on the “HSELog” system folder, on page 157, for more information on log files).
<i>Delivery type</i>	<p>This column displays the nature of the record, via an icon:</p> <ul style="list-style-type: none">  = 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  = 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  = indicates that 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. <p>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 <i>E-Mail/ Fax number/ Path/ Printer</i> and <i>Status</i> columns.</p>
<i>Date/Time</i>	This column displays the date/time stamp applicable to the processing of the job.

<i>Owner</i>	This column displays the Windows user associated with the print job.
<i>Form #</i>	This column displays the number of the form, and language, under which the AutoDoc HSE job was processed.
<i>E-Mail / Fax number / Path / Printer</i>	<p>This column displays the following content applicable to the delivery:</p> <ul style="list-style-type: none"> ▪ 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 <i>Nothing to process!</i> (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).
<i># Pages</i>	<p>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).</p> <p>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 <i>Pages</i> control will show the total number of pages in the file after the archive operation, not just the number of pages appended.</p>
<i>Subject</i>	<p>This column displays one of the following:</p> <ul style="list-style-type: none"> ▪ The subject heading as featured in a fax or e-mail ▪ The SMS message, in the case of an SMS message.

	<ul style="list-style-type: none"> ▪ 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 <i>Subject</i> 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)
<i>Attn</i>	This column displays the name of the recipient to whom a fax is directed for attention. This corresponds to the value specified in the <i>Attn</i> text control in AutoDoc HSE's form setup Fax tab.
<i>Status</i>	<p>This column displays the progress of the delivery. Completed AutoDoc HSE jobs are specified via one of the following:</p> <ul style="list-style-type: none"> ▪ 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.
<i>Computer Name</i>	This column displays the name of the PC which sent the print job to AutoDoc HSE (as defined in the workstation's property settings).
<i>E-mails, SMS, Faxes, Prints, Archives, XML, Errors</i>	These controls display the number of records displayed in the log for each delivery method (as well as any errors logged). <i>Archives</i> refers to PDF archive, while <i>XML</i> 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.



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.

Home

Global setup

Form independent translations setup

Main Log

Detailed log

Colours / words

Region

Colours

Page	Left	Top	Right	Bottom	Red	Green	Blue	Text
1	106	163	255	177	0	0	255	email@aprovider.com
1	106	200	183	214	0	0	255	621111111
1	106	238	178	252	5	5	5	ABC Autos
1	106	275	142	289	2	2	2	\$456

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.

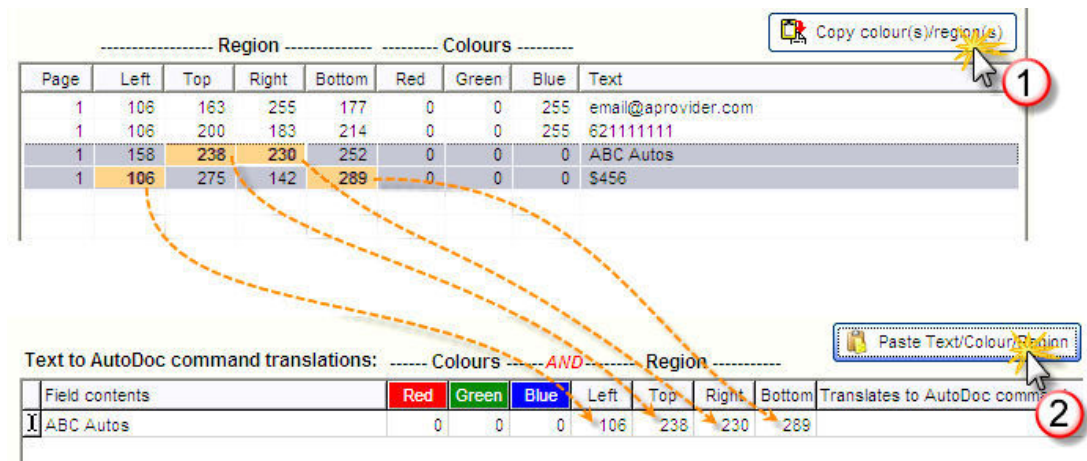


FIGURE 22 – showing a copy/paste operation involving regions and text copied from the colours/word log, into the form independent translations view. Note that regions will only be included in a copy/paste operation if the RGB values are 0,0,0.



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 22 above to copy and paste the desired values.

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.

Before individual users can access their logs, your network administrator may need to make some changes to AutoDoc HSE's user folders.

Making AutoDoc HSE clients accessible

Assuming AutoDoc HSE was installed in the default location, the clients are located in the following location by default:

```
C:\Program Files\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.

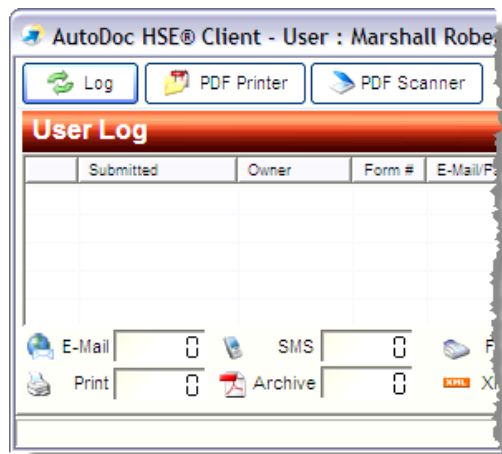
The user corresponding to the <username> folder needs to be given full control to that folder and its contents, with read/write access.

Using client viewers

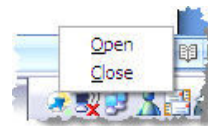
Once permissions have been set, individual AutoDoc HSE users can run the autodochseView.exe file located in their particular user folder. This launches the client viewer, and also adds an AutoDoc HSE icon to the user's system tray:



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).

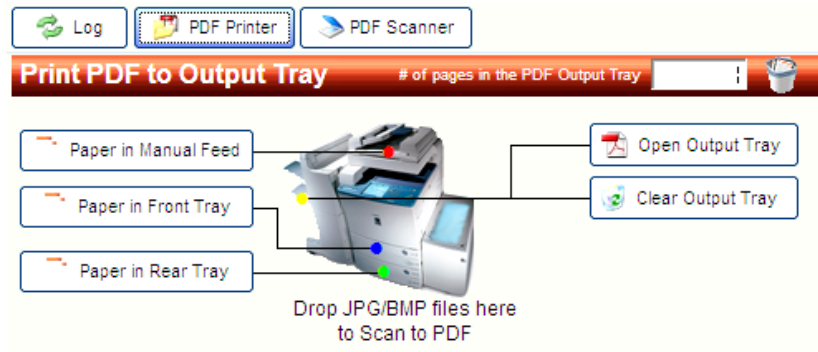
There are three views within the AutoDoc HSE client viewer:

- Log – which is a ‘mirror’ of the main log (defined in this manual starting from page 137), 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 139 for more detail on this feature of the main log).
- PDF Printer
- PDF Scanner

PDF Printer

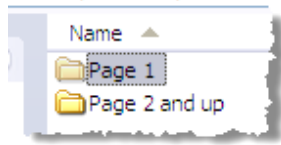
The PDF printer provides functionality to convert print jobs to PDF documents, without performing any actual delivery.

Any job sent to AutoDoc HSE 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 PDF printer's output tray.



The 'mailback' PDF converter is an alternative to using the client viewer as a PDF printer (see page 152 for information on a mailback configuration).

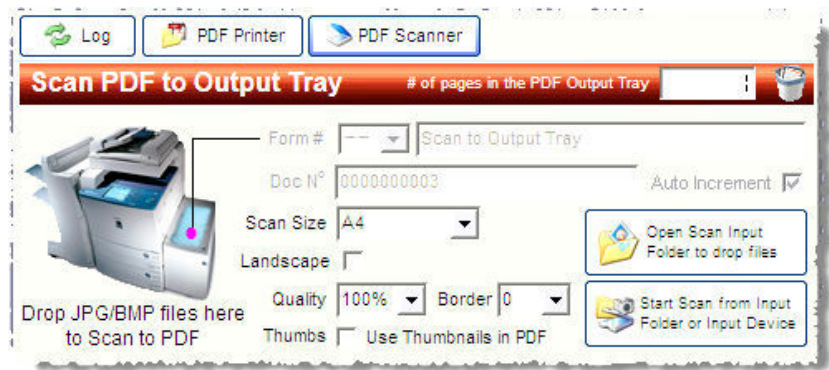
The following table provides detail for each of the controls in the PDF Printer view:

Control Name	Control Description
<i># of pages in the PDF Output Tray</i>	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.
<i>Paper in Manual Feed</i>	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. 
<i>Paper in Front Tray</i>	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, and as such will have front tray letterheads applied.
<i>Paper in Rear Tray</i>	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.
<i>Open Output Tray</i>	This button opens the PDF file to which PDF conversions are appended.
<i>Clear Output Tray</i>	This button deletes the PDF file to which PDF conversions are appended, after prompting to save a copy first.

PDF Scanner

The PDF scanner provides functionality to convert images to PDF documents, without performing any actual delivery. Image files can be 'dragged and dropped' onto the scanner, or the scanner can connect to a digital device, such as a camera, to retrieve images to convert to PDF.



The following table provides detail for each of the controls in the PDF Scanner view:

Control Name	Control Description
<i># of pages in the PDF Output Tray</i>	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.
<i>Form #, Scan to Output Tray, Doc N°, Auto Increment</i>	These controls are associated with enhancements which are under development.
<i>Scan Size</i>	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 scaled 75%, both horizontally and vertically.
<i>Landscape</i>	Use this checkbox to specify the orientation of the page.
<i>Quality</i>	Use this drop down list to specify the quality of the PDF output file (which will dramatically affect file size).

<i>Border</i>	Use this text control to specify a border width to be applied to the PDF output.
<i>Thumbs</i>	Use this checkbox to specify that the PDF output file should include thumbnail navigation images for each page.
<i>Open Scan Input Folder to drop files</i>	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.
<i>Start Scan from Input Folder or Input Device</i>	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 dialogue box opens, allowing you to choose from digital devices attached to the PC on which the client is running.

Extras

This section provides examples of how you can make AutoDoc HSE do even more work for you.

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 147).

However, using AutoDoc HSE's ability to create extra printers, you could also create a 'mailback' PDF converter, which, upon receiving a print job, would convert the document to PDF and e-mail it back to you.



FIGURE 23 - 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 Printer tab, create an additional shared printer (with a name that will be meaningful to your users):

A screenshot of a dialog box titled 'Create extra HSE Printer(s)'. It contains two input fields: 'Printer Name' with the text 'MailBackPDF' and 'Share Name' with the text 'HSEMBPDF'. To the right of these fields is a button with a printer icon and the text 'Create AutoDoc HSE Printer'.

2. Using the Windows printer list, edit the printer's properties to add some indicators (see page 108 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:

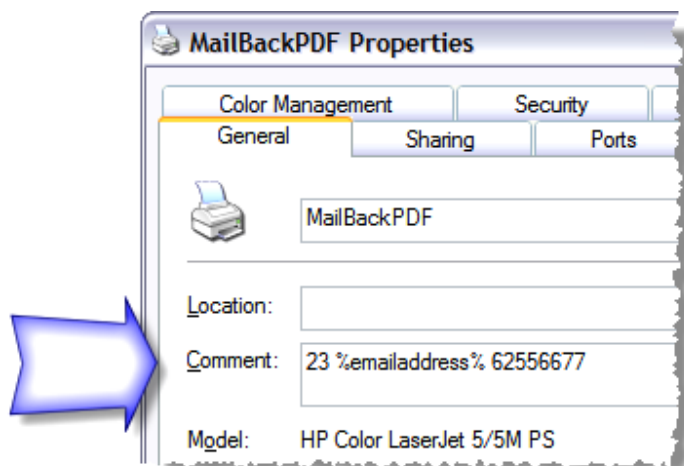
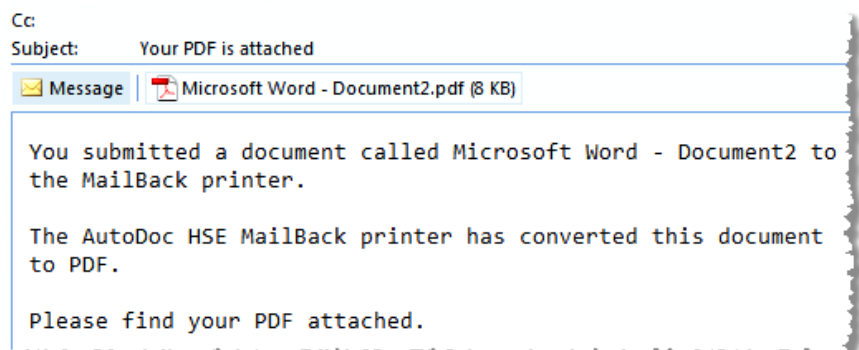


FIGURE 24 - an indicator in the mailback printer's *Comment* property. This indicator would instruct the printer to use AutoDoc HSE form 23 and send a fax to 62556677. Note also that an e-mail will be sent, since the user-specific system variable will be populated by the AutoDoc HSE user's e-mail address (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 25 on page 154).

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.



Home Form: 23/EN MailBack Copy to:

Variables Letterheads E-Mail Fax Print PDF Archive XML Archive

CC NO CC BCC NO BCC

Include attachments PDF XLS XLT TXT XML

Send E-Mail using user profile CREATOR/OWNER

E-Mail Address override NO OVERRULE

E-Mail Program override NO OVERRULE

Send MAPI E-Mail immediately ☐ Recd

Unchecked leave in Outbox

English (EN) Français (FR) Deutsch (DE) Español (ES) Italiano (IT) Português (PT) Nederlands (D)

Subject Your PDF is attached

Message file Text/HTML

Message text You submitted a document called %documentname% to the MailBack printer. The AutoDoc HSE MailBack printer has converted this document to PDF. Please find your PDF attached.

Display name When empty Form name %documentname%

Author Title Subject

Extra attachments (You can drag and drop files here)

☐ Attach PDF attachments to

FIGURE 25 – showing areas of the e-mail 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 and 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.

Overlays

Overlays behave in a similar fashion as letterheads, but because overlays are a document-based command, you can potentially specify a different overlay for every page of a document. Also, 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 26).

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

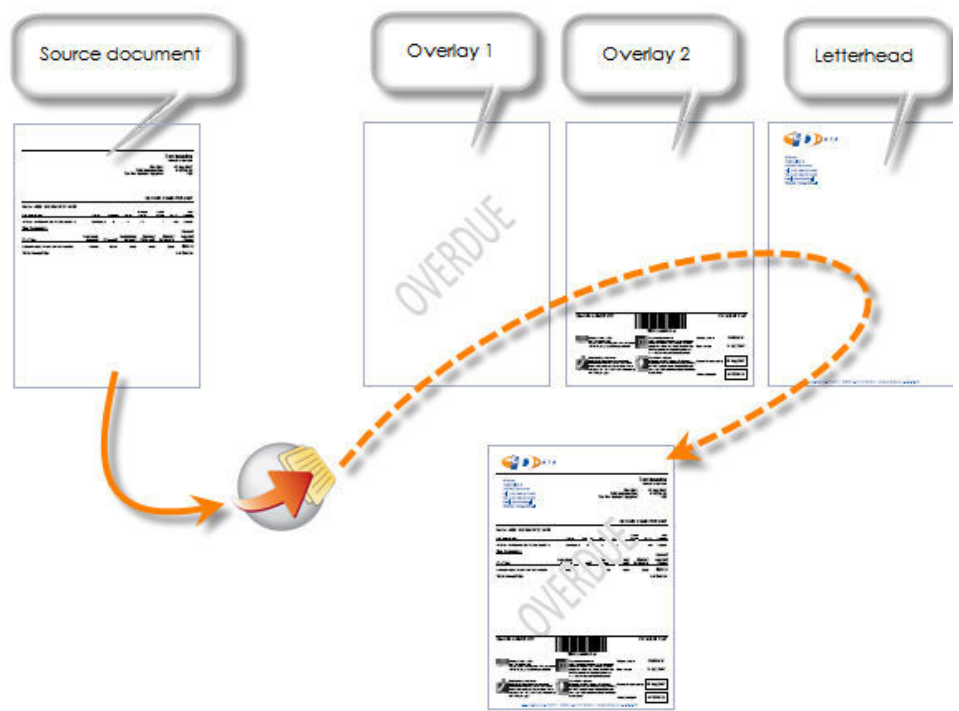


FIGURE 26 - showing AutoDoc HSE using overlays and a letterhead to produce final output combining all of these elements.

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 70 for more details).
- AutoDocHSEView.exe – the 'master copy' of the client viewer, from which the individual client viewers are copied.
- 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 27, and the content of each is outlined in the following sections.

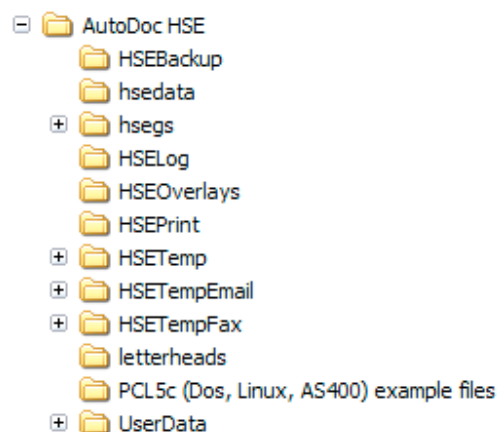


FIGURE 27 – the AutoDoc HSE folder structure

HSEBackup

This folder is the default location for AutoDoc HSE backups (as performed using the *Backup Selected Settings* button on AutoDoc HSE's Backup/Restore 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` – store definitions for user-defined variables, as defined in the Variables tab.
- `autodochse<form#><non-default language code>.ini` - 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/Restore tab.

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 154 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.

HSETemp

This directory is used by AutoDoc HSE for temporary storage of print processing files.

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.

letterheads

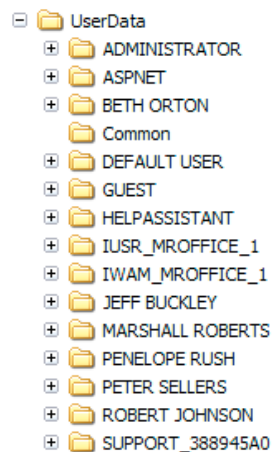
This folder is the default location for letterhead files. We recommend that letterheads are stored here (and backed up elsewhere), to ensure that the files remain local to the AutoDoc HSE application.

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.

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:

- 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 147 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.
- Scan Tray subfolder – the folder into which images to be ‘scanned’ into PDF output are placed. See page 150 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 139 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.exe` – the AutoDoc HSE client viewer for this user. See page 146 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 which is only present when the client viewer is being used.
- `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).
- `wPDF200A.dll` – packaged functional procedures associated with PDF generation.

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.
- Provides the means of trialling a copy of AutoDoc HSE.

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 *Temporary Licence* 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.

Appendix

The different features offered by the different versions of AutoDoc HSE are summarised in the following table:

Version and function matrix					
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	20	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	20	20
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.	x	x	✓	✓
Attachment types	Determine which file types can be used to deliver the print job via email.	PDF	PDF	PDF, XLS, XLT, TXT	PDF, XLS, XLT, TXT, XML
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
Multi - threading	Determines whether AutoDoc HSE can multi-thread print processes to accommodate a heavy print job load.	x	x	x	✓
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).	x	x	x	✓
XML archiving	Determines whether AutoDoc HSE can archive documents in XML file format.	x	x	x	✓
3 rd party archiving	Determines whether AutoDoc HSE can invoke third-party document management tools to handle files produced by the AutoDoc HSE archive function	x	x	x	✓
RAW printing support	Determines whether AutoDoc HSE can process RAW print data from applications such as DOS.	x	✓	✓	✓
Digital Signing	Determines whether AutoDoc HSE can dynamically pass e-mail attachments to and from third-party signing hardware.	x	x	x	✓

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 28 as an example, there is an index entry “Controls: *PDF Watermark in*”, but not an entry for “Controls: *Background*” nor “Controls: *Foreground*”.



FIGURE 28 - 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.

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