

Qoppa Software

# PDF Automation Server User Guide

Affordable, Powerful, Workflow PDF Server



## Table of Contents

Welcome to PAS.....	7
What's New .....	11
System Requirements.....	12
PDF Automation Server Installation Instructions.....	14
PDF Automation Server Settings.....	18
CMYK Settings.....	19
Font Settings .....	20
Log Settings .....	21
REST Settings.....	22
SMTP Settings .....	24
Registration.....	25
PDF Automation Server Help.....	27
REST Module .....	29
PAS REST API Module.....	29
REST Settings.....	31
REST User Authentication .....	33
HTML5 PDF Viewer .....	35
HTML5 PDF Notes Viewer.....	36
HTML5 PDF Viewer .....	41
Customize the HTML5 Toolbar.....	46
PAS Alfresco Setup .....	48
Workflow Module.....	51

PAS Workflow Module .....	51
The Jobs List .....	54
The Recent Events Log .....	56
The Full Events Log .....	57
Creating a New Job .....	59
Add Headers & Footers .....	93
Add Watermarks .....	101
Clear Security .....	109
Convert Excel Documents to PDF .....	115
Convert PDF to HTML5 .....	123
Convert PDF to Images .....	129
Convert to PDF/A .....	136
Convert Text to PDF .....	143
Convert Word Documents to PDF .....	150
Crop Pages .....	158
Custom Job .....	164
Digitally Sign PDF .....	165
Edit Document Properties .....	173
Export Annotations .....	180
Export Fields .....	186
Extract Text .....	192
Flatten Annotations .....	198
Flatten Fields .....	204

Import Annotations .....	210
Import Field Values .....	216
Insert Pages .....	222
Move Files with No Processing .....	228
Optimize PDF .....	232
Preflight.....	240
Print PDF Files.....	246
Recognize Text Using OCR.....	248
Set Passwords & Permissions .....	254
Split PDF .....	261
Editing a Job .....	268
Job Information Details.....	270
Source Settings.....	272
Storage of Originals .....	276
Job Specific Details.....	280
Trouble Handling.....	286
Supported File Types .....	289
Glossary .....	291



# Welcome to PAS

## PDF Automation Server – PDF Processing Server

PDF Automation Server is a modular server product that provides a rich set of PDF processing functions for different environments. Use PAS as an essential tool to streamline your PDF processing, document workflows and web service orchestration in your organization.

### REST API Module

PDF Automation Server provides a complete set of PDF processing and conversion functions in a robust REST server environment that can easily integrate into your existing document workflows and work with 3rd party integration and orchestration products.

### HTML PDF Markup Module

PDF Automation Server provides a module to enable markup of PDF documents in the browser. PAS can convert documents to HTML on-the-fly and can serve them to an HTML/Javascript module in the browser that allows end users to navigate and add and edit annotations on the PDF. On save, markups are sent back to the server to merge back into the PDF document.

### Workflow Module

PAS can receive documents in various formats from multiple sources concurrently, including email, ftp servers and local or network folders. Processes can then be defined independently for each document source to perform a number of functions on the documents, including conversion, data merging, assembly, encryption, printing, preflighting and more.

### Integration with Workflow Modules and ESB Servers

All workflow servers can easily integrated with PDF Automation Server through its REST API module. Most enterprise software provide modules to handle workflows, with PAS you can add PDF functionality to your document processes. Additionally, there are a number of software products, such as ESB and BPM servers whose sole function is to run workflows. These servers can make calles to 3rd party systems through REST APIs, including making calls to our PDF Automation Server.

### Mule ESB Integration Samples

## Proven Robust PDF Technology

PAS is built using Qoppa's industry leading PDF technology, developed over more than 10 years and used by thousands of customers worldwide. Qoppa's PDF technology is mature, robust, a leader in performance, and requires no third party software. PAS is a multi-platform product, it can be deployed on Windows, Linux, Unix (AIX, HP-UX, Solaris, etc), z/OS, Mac OS X and others.

## PAS Features

- **Powerful, Easy** - Our goal is to simplify PDF for you. PDF Automation Server (PAS) is a server product which is powerful, easy to set up and affordable. It doesn't require any programming and can be up and running in a few minutes only.
- **PDF Processing** - PAS provides a large number of PDF processing functions to manipulate PDF documents.
- **Reliability** - PAS has been produced and tested with the utmost care so that uptime is maximized and your documents are always processed reliably. Intelligent error handling and recovery is done at multiple levels in the software so that the server can recover from transient error conditions. Additionally, different processes are independent, so errors in one process will not affect other processes.
- **Multiple Sources** - PAS can receive documents from multiple sources concurrently. Documents from different sources can be handled in the same manner or unique processes can be defined for individual sources.
- **Multiple Destinations** - After processing documents, PAS can deliver the documents to multiple destinations. Each process in the server can send the resulting document to multiple destinations and different processes can send output to unique destinations.
- **Event Logging** - PAS keeps a complete log of events in the server, including informational, warning and error events. With the event log, users can track document processing and pinpoint causes of problems.
- **Notification** - PAS can send notification emails based on a number of criteria, including error conditions as well as successful processing of documents.
- **Platform Independence** - PAS is platform independent and can run on Windows, Linux, Mac OSX and several Unix flavors.

## PDF Processing Functions

- Convert from other formats to PDF (from images, Microsoft Word & Excel, text files)
- Convert PDF to other formats (to images, HTML/SVG, text files)
- Convert PDF to PDF/A for archival storage
- Convert PDF documents to HTML5 and serve directly to browsers
- Preflight documents to check compliance against various profiles



- Document security and encryption RC4 or AES encryption, set passwords and permissions
- Redact PDF documents to remove confidential information
- Sign PDF documents and create new signature fields
- Apply and verify digital signatures
- Import, export, flatten and fill interactive form data
- Import, export, flatten annotation data
- Automated printing of PDF documents
- Optimize PDF files reducing PDF file size by compressing images and streams and removing unused objects.
- Extract text content
- Apply OCR text recognition to recognize and add searchable text to PDF documents.
- Linearize PDF documents for fast web viewing
- Assemble/Merge/Split documents with ease
- Set Crop, Trim, Bleed and Art Box margins for PDF documents.
- Move, transfer or route files of all types, even when PDF specific process is not required.
- Stamp documents with watermarks, page headers and footers, images or any other text content. Text can be formatted and can include variables such as current date and time, file names, page numbers and others.









## Release notes

For documentation updates and release notes, refer to our knowledge base here ([PDF Automation Server change log](#))

## Download PDF Guide

v2019R1 User Guide -  PDF

## Previous Version User Guides

- v2018R2 User Guide -  Online  PDF
- v2018R1 User Guide -  Online  PDF
- v2017R1 User Guide -  Online  PDF
- v2016R2 User Guide -  Online  PDF

- v2016R1 User Guide -  PDF

# What's New

## New Major Features Released in v2019R1

PAS-472 – Regression: Print jobs not working sometimes

PAS-455 – Allow single set of credentials in Alfresco properties file

PAS-454 – Web Viewer & Notes: Scroll to next page on timer in page by page view

PAS-454 – Web Viewer & Notes: Page Up & Down keys in page by page view

PAS-453 – Annotation time is off in zones East of GMT 0'00

PAS-451 – Add source IP in logs of REST calls

PAS-450 – PDF list does not handle filename with special characters correctly

PAS-447 – Web Viewer: Thumbnails don't fit in the pane

PAS-446 – Add Simple SVG / HTML View for whole document in PAS Viewer Demo

PAS-445 – REGRESSION: Unable to open password protected files

PAS-442 – Duplicated folders are created on upload dialog

PAS-438 – PAS Install4J errors

PAS-437 – Ignore missing developer “map” JavaScript files

PAS-436 – Mixed content errors in web console

PAS-424 – Rename ‘version’ to ‘pasVersion’ in PreflightInformationModel

This version also includes all the improvements and bug fixes that were added to the underlying PDF engine in the last year and that will be released in the coming version of the libraries v2019R1.

[Read our Press Release](#)

# System Requirements

## Installation requirements




### Service

- 400 MB free hard disk space (In addition to space needed for processed files)
- Network connection (remote server management)
- Service: 1 GB RAM

### Client

- 400 MB free hard disk space
- Network connection (remote server management)
- PAS Manager: 512MB RAM
- Screen resolution of 1024 x 768 or higher is highly recommended
- Pointing device and keyboard

## Supported Operating Systems

	Platform
	Windows (32 or 64 bit) - Windows 10, Windows 8 & 8.1, Windows 7, Vista, XP, Server, NT, etc...
	Mac (64 bit only) - 10.13 (High Sierra), 10.12, 10.11, 10.10, 10.9, 10.8, 10.7
	Linux (32 or 64 bit) - Ubuntu, Mint, Debian, etc...

	Other Unix* – AIX, Solaris Intel, Solaris Sparc, HP-UX
--	--

*\*Java Runtime Required:*

*The Java Runtime Environment (JRE) 1.7x, is the minimum version required to use the full functionality of PDF Automation Server. However, we strongly recommend Oracle Java version 1.7.x, patch level 80, or the latest Oracle Java 7, - for Linux users - OpenJDK 7.*

## Installation Instructions

# PDF Automation Server Installation Instructions

To install PDF Automation server first download the appropriate installer from the website [HERE](#). Then follow the instructions below to install PDF Automation Server on your machine.

## Windows 32-bit Instructions:

- Instructions
    - After downloading, double-click QoppaPAS\_vXX\_win32.exe (where XX should be replaced with the current version number).
- 

## Windows 64-bit Instructions:

- Instructions
    - After downloading, double-click QoppaPAS\_vXX\_win64.exe (where XX should be replaced with the current version number).
- 

## Mac OS X Instructions:

- Instructions
    - After downloading, the installer should launch automatically and create an icon on the desktop.
    - The installer is a standard PackageMaker installer packaged inside a disk image. The operating system should recognize the files and launch the installer automatically.
    - If the installer doesn't start on its own:
-

- Double click on the installation file QoppaPAS\_vXX\_mac64.dmg (where XX should be replaced with the current version number) to mount the disk image, then double click on the mounted image.
    - Finally double click on the PDF Automation Server Installer.
  - Notes
    - PDF Automation Server v2019R1 works on Mac OS X 10.11 (El Capitan), Mac OS X 10.10 (Yosemite), Mac OS X 10.9 (Mavericks), 10.8 (Mountain Lion), 10.7 (Lion).
    - After installation, the installer should remove the downloaded files automatically. If this does not happen, you can manually drag the files to the trash.
- 

## Linux 32-bit Instructions:

- Instructions

After downloading the installer, open a Terminal window and type the following two commands:

    - **cd Downloads** to go to the directory where you downloaded the installer.
    - **sh ./QoppaPAS\_vXX\_linux32.sh** (where XX should be replaced with the current version number). This will start the installer.
- 

## Linux 64-bit Instructions:

- Instructions

After downloading the installer, open a Terminal window and type the following two commands:

    - **cd Downloads** to go to the directory where you downloaded the installer.
    - **sh ./QoppaPAS\_vXX\_linux64.sh** (where XX should be replaced with the current version number). This will start the installer.
-

## Other Unix Instructions: AIX, Solaris, HP-UX

- Instructions
  - After downloading the installer, open a shell and, cd to the directory where you downloaded the installer.
  - At the prompt type: **sh ./QoppaPAS\_vXX\_unix.sh** (where XX should be replaced with the current version number). This will start the installer.
- Notes
  - You need to install a Java 1.7 (or higher) virtual machine. When available, we strongly recommend using the JVM distributed by Sun Oracle as our experience has been that other JVMs introduce a lot of issues in PDF Automation Server (GTK issue with toolbar spacing issues, no SWT support for native file browser, other bugs with image rendering). You can download one from [Sun's Java web site](#) or contact your OS manufacturer.



The PDF Automation Server runs as a service on Windows, and as a daemon on other operating systems. By default, the server will use port 8093 to communicate with the PAS Manager. In order to run the server on a different port, stop the server and modify HttpPort attribute (HttpsPort for secured server) in the PASProp.xml settings file. The PASProp.xml is located in the directories below based on your OS.

- Windows: will be located in the QoppaPAS folder in the Program Data directory
- Linux/Unix/Mac: will be located in the PAS installation directory

**Note:** *The server must be stopped prior to editing this file. The PASProp.xml file will not be created until the server stopped and when the file is created will overwrite the current PASProp.xml file with the current settings in PAS.*

## Windows

During installation, there is an option to run the QoppaPAS service automatically on startup. This can be modified later in the Windows Service Manager Console, as well as start and stop the QoppaPAS service. Additionally, there is a command-line executable in the installation folder named QoppaPAS.exe that allows you to start, stop, and get the status of the QoppaPAS service.

Usage: QoppaPAS.exe {-start|-stop|-status}

**Note:** *In Windows Vista and Windows 7, due to permissions issues, you will need to run the command line shell (cmd) as administrator to stop and start QoppaPAS.*

## Linux/Unix/Mac

During installation, the start/stop script for the QoppaPAS daemon is copied to the installation folder.

Usage: sudo service QoppaPAS {start|stop|status}

## What's Next?

Once the server has been started you can begin working with the [Workflow Module](#) or [REST Module](#) to start processing documents for your needs.

## PAS Settings

# PDF Automation Server Settings

The Settings menu allows customization of various PDF Automation Server settings. The settings selected will be modifying the settings for the currently connected server (not the PAS manager)

[CMYK Settings](#): displays the CMYK profile settings options for the server.

[Font Settings](#): displays the Word to PDF font settings for the server

[Log Settings](#): displays the log settings for the server

[REST Settings](#): displays the REST connection and directory settings for the server

[SMTP Settings](#): displays the SMTP settings options for email sent by the server

## CMYK Settings

The CMYK settings allows you to set the CMYK profile to be used when converting images to RGB.

**Note:** *By default PAS comes packaged with the USWebCoatedSWOP.icc profile. The custom profile set in these settings will be used in place of the PAS defaults.*

To open the CMYK Settings dialog:

1. Go to **Settings > CMYK Settings**

### Settings

**Use custom CMYK profile** - check this option to use the custom CMYK profile set in the below option instead of the PAS defaults

**CMYK file** - enter the complete file path to the location of the CMYK file on the server.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Font Settings

The Font settings allows you to set whether fonts are embedded or not when converting word documents (.doc or .docx) to PDFs. It also allows you to set a fallback font to be used when the font does not exist on the server.

**Note:** *By default PAS will use the DroidSansFallbackFull.ttf font that has been packaged with the installer as a fallback font.*

To open the Font Settings dialog:

Go to **Settings > Font Settings**

## Settings

**Do not embed fonts** - fonts will not be embedded in the document when converted. Instead fonts will be referenced by name within the document and it will be up to the PDF viewer to find the font on the system to be displayed when viewing the document.

**Embed fonts** - fonts will be embedded into the PDF document when converted.

**When embedding fails** - Determines what PAS will do if the font named in the Word document does not exist on the server.

- **Throw error:** if the font is not found on the system the document conversion will fail and display an error in the PAS log
- **Use fallback font:** will attempt to find the characters within the fallback font set below.

**Note:** *When converting a word document PAS will first look for the font on the system, then will attempt to find the characters within the fallback font set. If no characters are found within either the system or fallback font the entire document will fail conversion. It's important that, when selecting a fallback, a font is chosen with as many characters as possible to avoid conversion failures.*

**Fallback font** - enter the complete file path to the location of the font file (.ttf) on the server.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Log Settings

The Log settings allows you to set how long the logs are stored within PAS and how often they are cleared. By default PAS will keep log records for the last 30 days deleting the oldest logs at 24 hour intervals.

To open the Log Settings dialog:

1. Go to **Settings > Log Settings**

## Settings

**Keep Records (days)** - Number of days log records will be kept in the database. Records older than the specified number of days will be automatically deleted.

**Delete Interval (hours)** - The interval at which log records older than the specified number of days will be automatically deleted.

# REST Settings

The REST settings allows you manage REST API specific settings including connection options, storage directory, number of threads used by processes when making [REST API](#) calls to the server.

To open the REST Settings dialog:

Go to **Settings > REST Settings**

## Settings

### General

**Rest Server** - Sets the IP address to receive REST calls from on the server. When set to a specific address calls can only be made to the server from that address. If 0.0.0.0 is selected the server will serve REST resources on all available network interfaces.

**Content Provider:** Sets the content provider (where the files are stored and managed) for the PAS service

- **PAS Storage:** The default value that uses the directory set in the "Storage Directory" option. This directory is local to where the server is running.
- **Alfresco:** Integrates with an Alfresco Document Management server. The Alfresco provider is configured with alfresco.properties in the QoppaPAS directory within Program Data. The server must be restarted to access new properties. See [Alfresco Setup](#) for more information

**Storage Directory** - enter the complete file path to the directory you wish to have all of the REST files stored on the server.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Threads** - the number of threads (cores) on the server you want to be used by REST processes. The number to the right of the field will display the total number of cores available on the server.

**Allow Origin** - Setting that lets you access REST services from another domain. It will set the value of the "Access-Control-Allow-Origin" response header.

## HTTP

**Enable HTTP** - enables HTTP access to a specified port

**HTTP Port** - port to be used for HTTP access. The default setting is 8090.

***Note:** The HTTP Port cannot match the HTTPS or RMI (default 1099) port settings*

## HTTPS

**Enable HTTPS** - enables HTTPS access to a specified port

**HTTPS Port** - port to be used for HTTPS access. The default setting is 8091.

***Note:** The HTTPS Port cannot match the HTTP or RMI (default 1099) port settings*

**PKCS#12 File** - enter the complete file path to the PKCS#12 file (.pfx or .p12) used by HTTPS calls made to the server.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Password** - The password to access the keystore file

## SMTP Settings

The SMTP settings are where you set the email settings to be used by the server when sending emails for job tasks. The email settings will need to be obtained from your email service provider.

To open the SMTP Settings dialog:

1. Go to **Settings > SMTP Settings**

### Settings

**Outgoing Mail Server** - outgoing mail server address

**From E-mail Address** - the name that will be displayed in the "From:" field to the recipients that receive the email

### Authentication

Complete this section if your SMTP server requires additional authentication

**User Name** - user name needed to login to the SMTP server

**Password** - password needed to login for the user name set above

**TLS/SSL** - check this box if your server requires TLS or SSL encryption

**POP3 Server** - the POP3 server address (if needed)

**SSL** - check this box if your POP3 connection requires SSL encryption



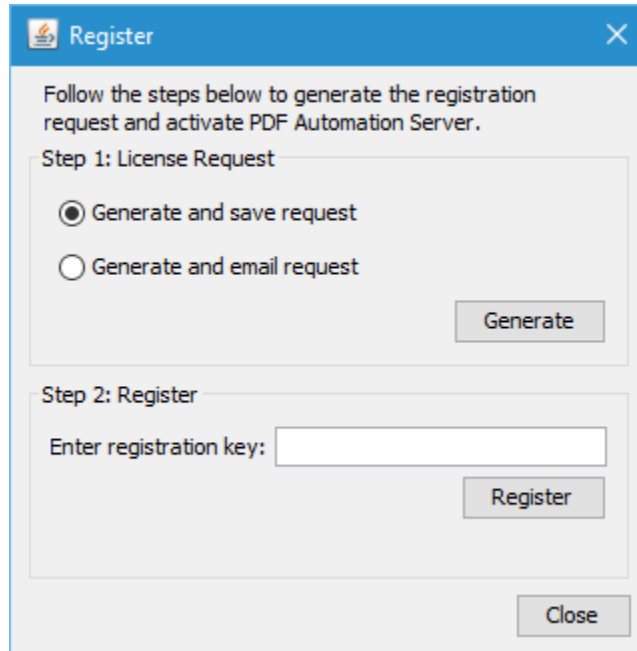
# Registration

When running in demo mode, a watermark will be added to documents upon saving them. To run in full production mode, PDF Automation Server needs to be activated with a license key. If you have not yet purchased a license you can do so by going to <http://www.qoppa.com/pdfautomation/buy/> or clicking on the "Buy Now" button in the startup dialog of PAS Manager. Otherwise follow the steps below to activate your product.

## Step 1: Generating a License Request

After you make your purchase, you will need to first generate a license request so that the license key can be created for the specific server. To generate a license request follow the steps below.

1. Start PAS Manager and connect to the server that needs to be registered. (See [Getting Started with PAS](#) for more info)
2. Once connected to the server you will see the Registration dialog. Click on "**Register**"
3. Choose to either "**Save**" or "**Email**" the license request. and then click on "**Generate**"
  - **Generate and Save Request:** Use this option if you do not have a connection to the internet. This will generate the license request file that you will then need to send to Qoppa via email to [keys@qoppa.com](mailto:keys@qoppa.com) for your license to be generated.
  - **Generate and Email Request:** Use this option if you have connection to the internet. This will generate and email the license info directly to Qoppa. Make sure to enter your correct email address in the following screen when sending the request as this is what will be used to validate your purchase and send back the license key.



## Step 2: Activating / Registering PAS

Once you receive the license key, launch the PAS Manager, and a dialog will show up where you can click on the "Register" button. Then enter the registration key provided to you via email and click "Register". Once the license is validated the dialog will close and the PAS log will display *"License key validated, now running Production Mode"* confirming that PAS is now activated.

# PDF Automation Server Help

Users who have purchased PDF Automation Server receive free online and e-mail technical support.

## Online

PDF Automation Server Online Knowledge base

## Within PDF Automation Server

Contact us from within PDF Automation Server by going to **Help > Email Support** and sending us an email or question. This is the most effective way for us to assist you as it will provide us a copy of the PDF Automation Server logs which will help us to resolve any problems you may have.

## Email

[support@qoppa.com](mailto:support@qoppa.com)

Only e-mail Technical Support directly if you encounter problems while using PDF Automation Server and are unable to send us an e-mail from Within PDF Automation Server as listed above. When you contact us, please have a clear description of the problem, PDF Automation Server version, name and version of your operating system, as well as include any documents or screenshots showing the issue. To find the PDF Automation Server version and serial number, start PDF Automation Server and select About from the Help menu.



# REST Module

## PAS REST API Module

Integrate PDF processing into your own and 3rd party applications. PDF Automation Server provides a complete set of PDF processing and conversion functions that can be accessed through standard REST calls. By providing a RESTful API interface, you can orchestrate PDF processing with your applications and other web services, to be able to provide end-to-end handling of documents.

### What is REST?

REST is based on the HTTP protocol and is a simple way to provide services over the web. Since it is widely supported, REST integrates easily with existing workflows and processes. It can be called from any language (.NET, Java, PHP, Ruby, Rails, Python, jQuery) and any platform (Salesforce, Amazon Web Services, Google App Engine) that supports REST.

### What PDF Processing functions are supported?

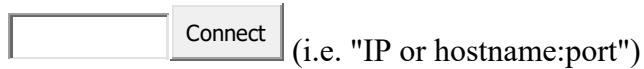
- Convert from other formats to PDF (from images, Microsoft Word & Excel, text files)
- Convert PDF to other formats (to images, HTML/SVG, text files)
- Convert PDF documents to HTML5 and serve directly to browsers
- Document security and encryption RC4 or AES encryption, set passwords and permissions
- Redact PDF documents to remove confidential information
- Sign PDF documents and create new signature fields
- Apply and verify digital signatures
- Import, export and fill interactive form data
- Automated printing of PDF documents
- Optimize PDF files
- Extract text content
- Apply OCR text recognition
- Linearize PDF documents for fast web viewing
- Integrate with ESB servers, such as Mule ESB.
- Integrate with [Mobile Apps](#)
- [Alfresco Document Management Server Integration](#)

### How to Access the REST Module?

The REST server is automatically started as a part of the PAS service. The rest module runs as a part of the PAS service. Once the PAS service is running (see [Getting Started](#)) open a

browser and navigate to the address below to view the REST module including APIs and HTML Viewer / Notes samples.

- Open your browser and navigate to "[Server IP or hostname]:[Rest Server Port]"
  - port default: 8090
- Enter REST server address below



(i.e. "IP or hostname:port")

**Note:** Make sure that the fire wall settings on the server are not blocking the "QoppaPAS" process or the port being used by PAS (default 8090). See [REST Settings](#) to determine your Rest server IP and Port.

## Rest Settings

# REST Settings

The REST settings allows you manage REST API specific settings including connection options, storage directory, number of threads used by processes when making [REST API](#) calls to the server.

To open the REST Settings dialog:

Go to **Settings > REST Settings**

## Settings

### General

**Rest Server** - Sets the IP address to receive REST calls from on the server. When set to a specific address calls can only be made to the server from that address. If 0.0.0.0 is selected the server will serve REST resources on all available network interfaces.

**Content Provider:** Sets the content provider (where the files are stored and managed) for the PAS service

- **PAS Storage:** The default value that uses the directory set in the "Storage Directory" option. This directory is local to where the server is running.
- **Alfresco:** Integrates with an Alfresco Document Management server. The Alfresco provider is configured with alfresco.properties in the QoppaPAS directory within Program Data. The server must be restarted to access new properties. See [Alfresco Setup](#) for more information

**Storage Directory** - enter the complete file path to the directory you wish to have all of the REST files stored on the server.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Threads** - the number of threads (cores) on the server you want to be used by REST processes. The number to the right of the field will display the total number of cores available on the server.

**Allow Origin** - Setting that lets you access REST services from another domain. It will set the value of the "Access-Control-Allow-Origin" response header.

## HTTP

**Enable HTTP** - enables HTTP access to a specified port

**HTTP Port** - port to be used for HTTP access. The default setting is 8090.

***Note:** The HTTP Port cannot match the HTTPS or RMI (default 1099) port settings*

## HTTPS

**Enable HTTPS** - enables HTTPS access to a specified port

**HTTPS Port** - port to be used for HTTPS access. The default setting is 8091.

***Note:** The HTTPS Port cannot match the HTTP or RMI (default 1099) port settings*

**PKCS#12 File** - enter the complete file path to the PKCS#12 file (.pfx or .p12) used by HTTPS calls made to the server.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Password** - The password to access the keystore file



## REST User Authentication

The PAS REST service has built in user authentication that can be enabled to prevent users from calling specific methods such as GET, PUT, POST, & DELETE. Once user authentication has been enabled all calls to the server will need to be authenticated by passing through the user name and password within the REST call.

**Note:** *When user authentication is enabled the HTML PDF Viewer/Notes will prompt with a dialog for the REST authentication credentials before the document is served. If the document also has an "Open Password" the user will be prompted twice, first for the REST server and then again for the document password.*

### Setting up REST User Authentication

To enable user authentication follow the steps below.

1. Stop the PAS service
  - Windows: Use the Windows Service Manager to stop the "QoppaPAS" service or using the command prompt navigate to the installation directory and enter the following command **"QoppaPAS.exe -stop"**
  - Linux/Unix/Mac: Navigate to the installation directory and stop the daemon service by using **"QoppaPAS stop"** or **"sudo service QoppaPAS stop"**
2. Navigate to the installation directory and locate the "rest-users.xml" and open it in any xml/text editor
3. Replace the sample users with the users for your server. Create each user on a separate line using the following format: **<user username="user" password="password" roles="roles" />** replacing "user" with the user name, "password" with the password for the user, and "roles" with REST call methods that the user has permission to separated by commas (i.e. GET, POST, PUT). See the example at the bottom of this page.
  - **Note:** *Make sure to remove the comment out tags "<!--" and "-->" and examples included in the initial installation file*
4. Start the PAS service
  - Windows: Use the Windows Service Manager to start the "QoppaPAS" service or using the command prompt navigate to the installation directory and enter the following command **"QoppaPAS.exe -start"**
  - Linux/Unix/Mac: Navigate to the installation directory and start the daemon service by using **"QoppaPAS start"** or **"sudo service QoppaPAS start"**

**IMPORTANT:** *In order to enable the user authentication the service must be stopped and started. Modifying the "rest-users.xml" while the service is running will not load the user authentication changes as the user authentication is only loaded into the service at startup.*

## Example REST users

Below is an example showing how sample users added to the "rest-users.xml" file.

```
<users>

  <user username="john" password="password" roles="GET" />

  <user username="jane.doe" password="12345678" roles="GET, POST, PUT" />

  <user username="admin" password="admin" roles="GET, POST, PUT, DELETE"
/>

</users>
```

## HTML5 PDF Viewer/Editor

### HTML5 PDF Viewer

The PAS REST Module comes packaged with a ready to go HTML5 PDF Viewer that uses the REST server to view/modify documents directly in the browser with no plug-ins required. The HTML5 viewer can be added to any page with minimal coding by simply creating an iframe element on the page with the path to the document stored on the server.

There are two separate viewers packaged the REST server depending on your needs:

[HTML5 PDF Notes](#) - This viewer allows users to add annotations and save the document directly in the browser.

[HTML5 PDF Viewer](#) - This is the simple HTML page that is for viewing PDFs only.

## HTML5 PDF Notes Viewer

The HTML5 PDF Notes Viewer is a PDF viewer that is developed using HTML5 and JavaScript. It allows you to add annotations to the document. It works in tandem with the PDF Automation Server to convert supported files (.pdf, .doc, .docx, .jpeg, .png, gif, .tiff) directly to SVG format and then serve the document to the viewer.

Below are instructions on how to get started using the web viewer. The HTML5 viewer can be added to the page with minimal coding by simply creating an iframe element on the page with the URL to the document.

### HTML5 PDF Notes Viewer

The standard viewer is designed to run on any desktop browser. The standard viewer can be loaded by itself as a full page viewer or embedded directly within the page using an iframe. A sample of the viewer embedded in an iframe can be found in the installation directory under "/html/viewer".

### Creating a Direct Link to the Viewer

1. Create a link to serve a PDF to the user in the following format:
  - "http://{host}:{port}/viewer/pdfnotes.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.
2. Navigate to the created URL to test the standard viewer.

### Embedding the Viewer Within a Page

1. Create a new HTML page or choose an existing page to add the PDF Viewer to.
2. Add styling for the iframe to fit the area that you need. The below example creates a frame that fills most the page.
  - **Note:** *The toolbar will resize automatically based on width but recommended 1,000px minimum.*

```
<style>
  body, html {
    margin: 0;
    padding: 15px;
```

```
        height: 96%;
        overflow: hidden;
    }

    /* Style the iframe: toolbar will resize automatically based on width but
    recommended 1,000px mininum */
    iframe {
        width: 100%;
        height: 100%;
        border: none;
    }

    /* Required to make the full screen button work */
    .iframe-fullscreen {
        position: absolute;
        left:0px;
        top:0px;
        width: 100%;
        height: 100%;
        border: none;
        z-index: 999;
    }
</style>
```

3. Add an iframe element to the page where you would like the viewer to appear.
4. Set the attributes & additional options for the iframe. The iframe source (src) to the viewer URL must follow the below format:
  - "http://{host}:{port}/viewer/pdfnotes.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.

```
<html>
<body>
    <!-- Set the attributes & additional options for the iframe. ID must be set to
    "viewerFrame" -->
    <iframe id="viewerFrame"
    src="http://localhost:8090/viewer/pdfnotes.html"></iframe>
</body>
</html>
```

- **NOTE:** *If embedding the viewer in an iframe, the origin (domain, protocol, and port) MUST match the parent page. If not the iframe may not load due to browser security settings. Use the following code instead for Cross-Origin iframe.*

```
<html>
<body>
  <!-- Set the attributes & additional options for the iframe. ID must be set to
  "viewerFrame" -->
  <iframe id="viewerFrame" src="http://host:port/viewer/pdfnotes.html"
  name="pdfviewer"></iframe>
  <script>
    setTimeout(function(){
      var url = window.location.href;
      window.frames.pdfviewer.postMessage(url, "*");
    }, 500);
  </script>
</body>
</html>
```

5. Load the web page on your server to test the viewer

## HTML5 Mobile PDF Notes Viewer

The mobile viewer is designed specifically to run on mobile devices with smaller screens. The mobile viewer has been optimized to make the best use of the entire area on smaller screens as well as touch enhanced navigation. You will need to either create a direct link to the mobile viewer ("mpdfnotes.html") or add code to automatically redirect the user to the mobile viewer page if a mobile device is detected.

**NOTE:** *For best results the mobile viewer should NOT be loaded within an iframe and should instead be served directly to the user as it's own page. It's recommended that instead of using redirect code, you should provide a direct link to the mobile viewer is created for mobile users. This will prevent unnecessary page flashing and shorten loading times on mobile browsers.*

### Creating a Direct Link to the Mobile Notes Viewer

1. Create a link to serve the PDF to the mobile user in the following format:

- "http://{host}:{port}/viewer/mpdfnotes.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.
2. Load the webpage on your server using a mobile device to test the mobile viewer

## Using JavaScript to Redirect to the Mobile Viewer

Below are instructions on how to setup a page redirect for mobile devices using JavaScript.

1. Follow the instructions for Setting Up the HTML5 PDF Viewer above.
2. Add the following JavaScript code to redirect the browser if a mobile device is detected to the header of the page (or create your own).
3. NOTE: Make sure to replace {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090). See [REST Settings](#) in the user guide for details on managing the hostname & port settings.

```
<script type="text/javascript">
    window.onload = function() {
        var docUrl = "http://{host}:{port}/viewer/mpdfnotes.html?filePath=" +
            getFilePath();
        if (navigator.userAgent.match(/Android/i) ||
            navigator.userAgent.match(/webOS/i) ||
            navigator.userAgent.match(/iPhone/i) ||
            navigator.userAgent.match(/iPod/i) ||
            navigator.userAgent.match(/iPad/i) ||
            navigator.userAgent.match(/Touch/i) ||
            navigator.userAgent.match(/IEMobile/i) ||
            navigator.userAgent.match(/Silk/i)){
            window.location.replace(docUrl);
        } else {
            window.onbeforeunload = function(e) {
                var dialogText = e.returnValue;
                return dialogText;
            };
        }
    }

    function getFilePath() {
```

```
var url =  
window.document.getElementById("viewerFrame").getAttribute("src");  
var docPath = url.split("=");  
return docPath[docPath.length - 1];  
}  
</script>
```

4. Load the webpage on your server using a mobile device to test the automated redirect and mobile viewer



## HTML5 PDF Viewer

The HTML5 PDF Viewer is a PDF viewer that is developed using HTML5 and JavaScript. It works in tandem with the PDF Automation Server to convert supported files (.pdf, .doc, .docx, .jpeg, .png, gif, .tiff) directly to SVG format and then serve the document to the viewer.

Below are instructions on how to get started using the web viewer. The HTML5 viewer can be added to the page with minimal coding by simply creating an iframe element on the page with the path to the document.

### HTML5 PDF Viewer

The standard viewer is designed to run on any desktop browser. The standard viewer can be loaded by itself as a full page viewer or embedded directly within the page using an iframe. A sample of the viewer embedded in an iframe can be found in the installation directory under "/html/viewer".

### Creating a Direct Link to the Viewer

1. Create a link to serve a PDF to the user in the following format:
  - "http://{host}:{port}/viewer/pdfnotes.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.
2. Navigate to the created URL to test the standard viewer.

### Embedding the Viewer Within a Page

1. Create a new HTML page or choose an existing page to add the PDF Viewer to.
2. Add styling for the iframe to fit the area that you need. The below example creates a frame that fills most the page.
  - **Note:** *The toolbar will resize automatically based on width but recommended 1,000px minimum.*

```
<style>
  body, html {
    margin: 0;
    padding: 15px;
    height: 96%;
```

```
        overflow: hidden;
    }

    /* Style the iframe: toolbar will resize automatically based on width but
    recommended 1,000px mininum */
    iframe {
        width: 100%;
        height: 100%;
        border: none;
    }

    /* Required to make the full screen button work */
    .iframe-fullscreen {
        position: absolute;
        left:0px;
        top:0px;
        width: 100%;
        height: 100%;
        border: none;
        z-index: 999;
    }
</style>
```

3. Add an iframe element to the page where you would like the viewer to appear.
4. Set the attributes & additional options for the iframe. The iframe source (src) to the viewer URL must follow the below format:
  - "http://{host}:{port}/viewer/pdfnotes.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.

```
<html>
<body>
    <!-- Set the attributes & additional options for the iframe. ID must be set to
    "viewerFrame" -->
    <iframe id="viewerFrame"
        src="http://localhost:8090/viewer/pdfviewer.html"></iframe>
</body>
</html>
```

- **NOTE:** *If embedding the viewer in an iframe, the origin (domain, protocol, and port) MUST match the parent page. If not the iframe may not load due to browser security settings. Use the following code instead for Cross-Origin iframe.*

```
<html>
<body>
  <!-- Set the attributes & additional options for the iframe. ID must be set to
  "viewerFrame" -->
  <iframe id="viewerFrame" src="http://host:port/viewer/pdfviewer.html"
  name="pdfviewer"></iframe>
  <script>
    setTimeout(function(){
      var url = window.location.href;
      window.frames.pdfviewer.postMessage(url, "*");
    }, 500);
  </script>
</body>
</html>
```

5. Load the web page on your server to test the viewer

## HTML5 Mobile PDF Viewer

The mobile viewer is designed specifically to run on mobile devices with smaller screens. The mobile viewer has been optimized to make the best use of the entire area on smaller screens as well as touch enhanced navigation. You will need to either create a direct link to the mobile viewer ("mpdfnotes.html") or add code to automatically redirect the user to the mobile viewer page if a mobile device is detected.

**NOTE:** *For best results the mobile viewer should NOT be loaded within an iframe and should instead be served directly to the user as it's own page. It's recommended that instead of using redirect code, you should provide a direct link to the mobile viewer is created for mobile users. This will prevent unnecessary page flashing and shorten loading times on mobile browsers.*

### Creating a Direct Link to the Mobile Viewer

1. Create a link to serve the PDF to the mobile user in the following format:
  - "http://{host}:{port}/viewer/mpdfviewer.html?filePath={path}" replacing {host} with the hostname or IP address of the PAS server, {port} with the Port set for the

rest service (default 8090), and {path} with the relative path of the file stored within the "storage" directory of the PAS server. See [REST Settings](#) in the user guide for details on managing the hostname, port, and storage directory settings.

2. Load the webpage on your server using a mobile device to test the mobile viewer

## Using JavaScript to Redirect to the Mobile Viewer

Below are instructions on how to setup a page redirect for mobile devices using JavaScript.

1. Follow the instructions for Setting Up the HTML5 PDF Viewer above.
2. Add the following JavaScript code to redirect the browser if a mobile device is detected to the header of the page (or create your own).
3. NOTE: Make sure to replace {host} with the hostname or IP address of the PAS server, {port} with the Port set for the rest service (default 8090). See [REST Settings](#) in the user guide for details on managing the hostname & port settings.

```
<script type="text/javascript">
    window.onload = function() {
        var docUrl = "http://{host}:{port}/viewer/mpdfviewer.html?filePath="
        + getFilePath();
        if (navigator.userAgent.match(/Android/i) ||
            navigator.userAgent.match(/webOS/i)
            || navigator.userAgent.match(/iPhone/i) ||
            navigator.userAgent.match(/iPod/i)
            || navigator.userAgent.match(/iPad/i) ||
            navigator.userAgent.match(/Touch/i)
            || navigator.userAgent.match(/IEMobile/i) ||
            navigator.userAgent.match(/Silk/i)){

                window.location.replace(docUrl);
        } else {
            window.onbeforeunload = function(e) {
                var dialogText = e.returnValue;
                return dialogText;
            };
        }
    }

    function getFilePath() {
        var url =
            window.document.getElementById("viewerFrame").getAttribute("src");
```

```
        var docPath = url.split("=");  
        return docPath[docPath.length - 1];  
    }  
</script>
```

4. Load the webpage on your server using a mobile device to test the automated redirect and mobile viewer

## Customize the HTML5 Toolbar

PDF Automation Server comes packaged with a ready to go HTML5 PDF Viewer that uses the REST server to view/modify documents directly in the browser with no plug-ins required. The HTML5 viewer can be added to any page with minimal coding by simply creating an iframe element on the page with the path to the document stored on the server. If you wish to customize the HTML5 PDF Viewer Toolbar follow the instructions below.

First follow the below instructions to setup the HTML5 PDF Markup or Viewer on your server:

- [HTML5 PDF Markup](#) – This viewer allows users to add annotations and save the document directly in the browser.
- [HTML5 PDF Viewer](#) – This is the simple HTML page that is for viewing PDFs only.

Once setup go to the PAS installation directory and under “\html\viewer” in the PAS installation directory.

Using any HTML or Text editor (such as Notepad++) edit the HTML file for the product you wish to use:

- pdfnotes.html – contains annotation, text markup, & redaction functionality
  - mpdfnotes.html – mobile version of notes viewer
- pdfviewer.html – PDF viewer only
  - mpdfviewer.html – mobile version of viewer only

All of the buttons are in the first part of the <body> in the <div class=”toolbar”> element. You can follow the instructions below to add or remove buttons.

## REMOVE BUTTONS

To remove or hide a button just delete or comment out any of the buttons or groups you don’t want. For example, to remove the redaction button from the toolbar remove the following lines of code:

```
<span class="buttonGroup">
  <button id="btnRedact" class="viewerbtn dropdown-toggle drawingbtn"
    title="Mark for Redaction" data-sticky="true"></button>
</span>
```

## ADD NEW BUTTONS

To add new buttons, you can just add new lines to the anywhere in the `<div class="toolbar">` element. For example you can add a new button by inserting the code below next to one of the other buttons on the toolbar. Once you have added the button you will need to attach either JavaScript or a Listener to perform the action you wish the button to do.

(see [https://www.w3schools.com/jsref/event\\_onclick.asp](https://www.w3schools.com/jsref/event_onclick.asp) for one example of how to do this)

```
<span class="buttonGroup">  
  <button id="myNewButton" class="viewerbtn" title="myToolTip"></button>  
</span>
```

**TIP:** Buttons can also be rearranged or organized differently by just reordering the HTML code.

Once you have completed the changes and save the file to the server they will take affect the next time the HTML5 Markup or Viewer is loaded.

## PAS Alfresco Setup

The PAS REST module comes with built in integration with the Alfresco Document Management server. This integration allows the PAS REST service to provide permission based access at the user level to documents.

**Note:** *the Alfresco storage integration is only available for the PAS REST services NOT the Automation Server.*

### Setup Instructions

1. You will need to already have an Alfresco Document Storage server setup and running. This can be on the same server as PAS or on a different server that the PAS server has access to. Learn more at [www.alfresco.com/](http://www.alfresco.com/).

2. Create a file called "alfresco.properties" that contains 2 entries:

- **baseDir:** The base directory that will be appended to all REST calls
- **serverUrl:** The API URL needed to integrate with the Alfresco service. This will be dependent on the version of your instance.
- **auth** (*optional*): Base64 encoded "username:password" string to set a single set of Alfresco credentials for any user accessing the server.

For example the values in the alfresco.properties file may look like this:

```
baseDir=/
```

```
serverUrl=http://host:port/alfresco/api/-default-/public/cmisis/versions/1.1/atom
```

```
auth=Basic yKk3hos4dhoSsdfS2Df72
```

**Note:** *Make sure to replace the **host** & **port** with the values for your Alfresco server*

3. Place the properties file in the directory below based on your OS.

- **Windows:** in the QoppaPAS folder in the Program Data directory
- **Linux/Unix/Mac:** in the PAS installation directory

4. Restart the QoppaPAS service to load the new properties file (or new changes to the file)



5. In PAS Manager go to Settings -> REST Settings -> General and choose “Alfresco” as the content provider. Then click OK to apply the settings.

6. Once complete, all REST calls to the PAS server going forward will use the Alfresco storage instance

## Examples

### Root Directory

With the above example, the baseDir is set to the root Alfresco directory. A file in a user directory would be accessed at a URL like this:

`http://host:port/qoppapdf/v1/documents/User Homes/username/userdoc.pdf`

### User Directory

If you only want to serve files in a certain directory, you can set the "baseDir" property to that directory (i.e. baseDir=/User Homes/username/) and then files would be accessed at a URL like this instead:

`http://host:port/qoppapdf/v1/documents/userdoc.pdf`



# Workflow Module

## PAS Workflow Module

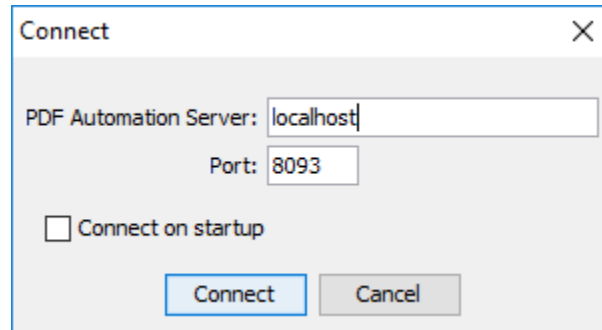
Automate the receiving, processing and routing of documents with the PDF Automation Server's Workflow Module. PAS can receive documents in various formats from multiple sources concurrently, including email, ftp servers and hot folders. Processes can then be defined independently for each document source to perform automated processing and handling of documents

- **Powerful, Easy** - Our goal is to simplify PDF for you. PDF Automation Server (PAS) is a server product which is powerful, easy to set up and affordable. It doesn't require any programming and can be up and running in a few minutes only.
- **PDF Processing** - PAS provides a large number of PDF processing functions to manipulate PDF documents.
- **Reliability** - PAS has been produced and tested with the utmost care so that uptime is maximized and your documents are always processed reliably. Intelligent error handling and recovery is done at multiple levels in the software so that the server can recover from transient error conditions. Additionally, different processes are independent, so errors in one process will not affect other processes.
- **Multiple Sources** - PAS can receive documents from multiple sources concurrently. Documents from different sources can be handled in the same manner or unique processes can be defined for individual sources.
- **Multiple Destinations** - After processing documents, PAS can deliver the documents to multiple destinations. Each process in the server can send the resulting document to multiple destinations and different processes can send output to unique destinations.
- **Event Logging** - PAS keeps a complete log of events in the server, including informational, warning and error events. With the event log, users can track document processing and pinpoint causes of problems.
- **Notification** - PAS can send notification emails based on a number of criteria, including error conditions as well as successful processing of documents.
- **Platform Independence** - PAS is platform independent and can run on Windows, Linux, Mac OSX and several Unix flavors.
- **Qoppa's Technical Support** - [Contact Qoppa's support](#) with any questions. We're here to help, always and we provide support at an expert level.

## Starting PAS Manager

PAS Manager is the graphical interface that connects to the server used to create jobs and update server settings. The PAS Manager can be started from the desktop icon or from the PAS Manager launcher in the installation folder. After starting the PAS Manager, the Connection Dialog is displayed to set the server you wish to connect to.

Enter the IP address or HostName and Port of the server you wish to connect to. If you installed both the server and manager this will default to "localhost". If you just installed the manager you will need to use the IP address or HostName and Port (default 8093) of the remote server.



**Note:** *If you are connecting to the localhost and the PDF Automation Server is not running, you will be prompted to start the server. By default, the server uses port 8093. If the server has been modified to use a different port, enter the new port number.*

Once connected to the PDF Automation Server, the Project Console is displayed with the jobs in the top portion and the log displayed in the lower portion.

## The Main Menu

- **File** – refresh the jobs list, connect to a server, and exit
- **Settings** - access to [CMYK color profile](#), [Font Embedding](#), [Log](#), [REST server](#), & [SMTP email](#) settings
- **Help** – access to documentation, send an email to support, information about PDF Automation Server

## The Jobs List

The [Jobs List](#) panel displays a list of jobs on the server as well as their current status. It also has buttons to manage and create new jobs (new, edit, start/stop, delete).

### Job Options

**New:** Starts the [New Job Wizard](#) to create a new automation job

**Edit:** Opens the job properties to begin [Editing a Job](#)

**Start/Stop:** Starts or Stops the selected job on the server

**Delete:** Deletes the selected job from the server

## The Recent Events Log

The [Recent Events Log](#) panel displays the last 100 events logged in the server. This includes events for both the Workflow & REST API modules.

**Note:** *As you are setting up your first projects, you can add to PAsprop.xml settings file an additional entry `Verbose = "true"` so the log will be more verbose.*

### Event Log Options

**Clear:** Clears only the log items in the [Recent Events](#) list

**Note:** *Clearing the recent events list does not delete the actual log entries from the database. You can delete logs from the [Full Events Log](#) window.*

**Full Log:** Displays the [Full Events Log](#) window



## ID

This is the name of the XML file used to store the job information. This name must be completely unique to all other job IDs on the server. It is possible to use the operating system to change the file name when the server is not running. Never attempt this while the server is running the job.

**Note:** *After changing the file name the server must be restarted in order for PAS to pick up the new ID.*

## Name

A descriptive name set for the job either when creating or editing the task

## Type

Displays the actual job type that was selected when it was created

## Startup

Indicates whether the job is started manually or automatically when the server is started or restarted.

**Manual:** If the server is started or restarted you will need to manually start the job again in order for it to run

**Automatic:** The job will automatically attempt to start the job anytime the server is started or restarted

**Note:** *If set to automatic and you have not carefully tested the job information, then you may see unpredictable results the next time this job is reloaded.*

## Start Time










Displays the date and time of when the job was started

## Processed

Displays the number of files that have been processed since the job was originally created.

## The Recent Events Log

The recent events log is used to view recent events on the server. It will display the last 100 events logged in the server. This recent events list is updated every 5 seconds. Double click on an event to display additional details of that log entry.

Recent Events			
Type	Date/Time	Job Name	Description
 Information	03/22/2016 09:53:55	Convert Word Documents	Acquired file 0-2 Thai.doc
 Information	03/22/2016 09:53:56	Convert Word Documents	Processing started
 Information	03/22/2016 09:53:56	Convert Word Documents	Processing 0-2 Hebrew.doc
 Information	03/22/2016 09:54:04	Convert Word Documents	Processing 0-2-128 (2).doc
 Information	03/22/2016 09:54:10	Convert Word Documents	Processing 0-2-128 Shift JIS.doc
 Information	03/22/2016 09:54:14	Convert Word Documents	Processing 0-1-2 DEFAULT.doc
 Information	03/22/2016 09:54:14	Convert Word Documents	Processing 0-2 Vietnamese.doc
 Information	03/22/2016 09:54:15	Convert Word Documents	Processing 0-2 Thai.doc
 Information	03/22/2016 09:54:15	Convert Word Documents	Processing finished

Clear

Full Log

### Recent Event Log Options


**Clear:** Clears only the log items in the Recent Events list


**Note:** *Clearing the recent events list does not delete the actual log entries from the database. You can delete logs from the [Full Events Log](#) window.*

**Full Log:** Displays the [Full Events Log](#) window

### Log Types

The log contains three types of messages associated with each event. To see additional details double click on the event.

 **Information:** General information on the event that was performed (i.e. acquiring file, processing file, etc...)

 **Warning:** Events that were able to complete but with warnings

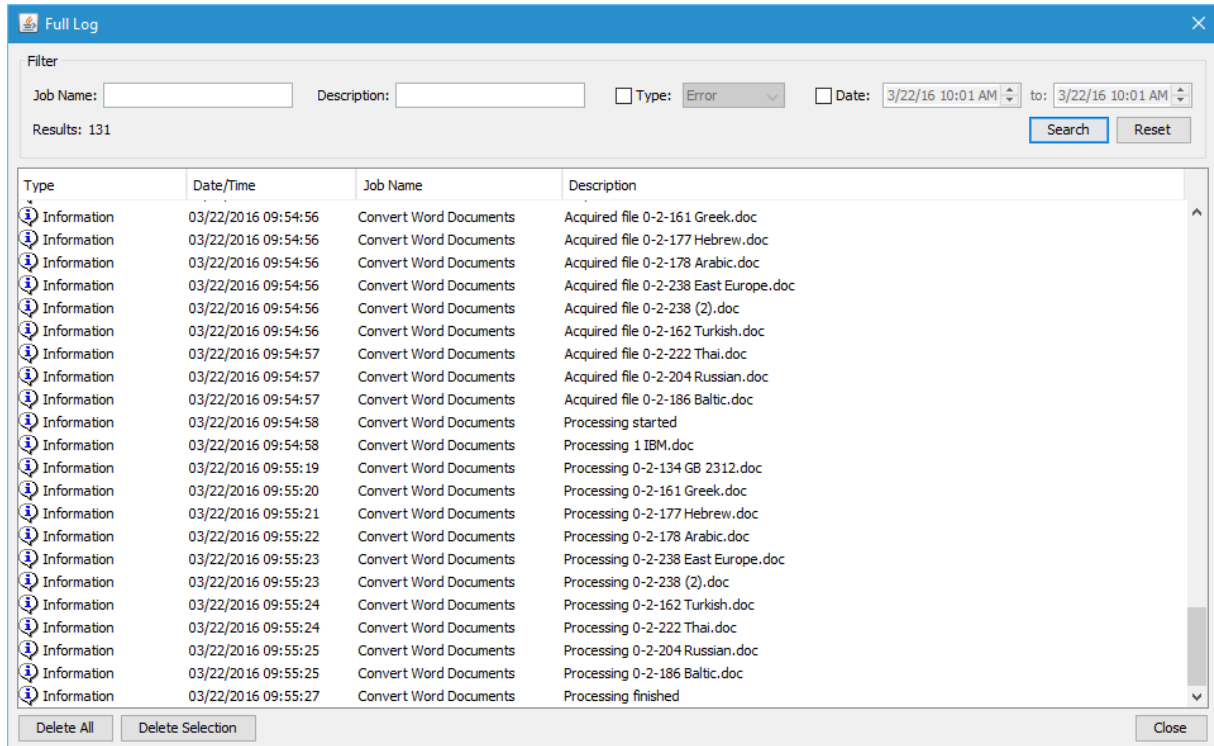
 **Error:** Events that completely failed to complete



# The Full Events Log

The Full Events Log allows you to view and search all of the logged events recorded in the database. By default the Full Log will display all logs within the database. To narrow down the results use the search function at the top of the window. Log columns can also be sorted in order by clicking on the column title.

**Note:** The number of events available will be based on the [Log Settings](#).




## Full Event Log Options


**Delete All:** Deletes ALL logs from the database


**Delete Selection:** Deletes only the currently selected logs. Multiple events can be selected at once by holding down CTRL (Command on Mac) and then clicking on each file in the list.

## Log Types

The log contains three types of messages associated with each event. To see additional details double click on the event in the list.

 **Information:** General information on the task that was performed (i.e. acquiring file, processing file, etc...)

 **Warning:** Tasks that were able to complete but with warnings

 **Error:** Tasks that completely failed to complete

## Search Options

**Job Name:** Searches for any matching text for the name in the event log. This is not case sensitive

**Description:** Searches for any matching text for the description of the event log. This is not case sensitive

**Type:** Searches for events based on the types listed above

**Date:** Select a date range to search within the log

**Reset:** Resets all of the search options to default displaying all of the logs found in the database

# Creating a New Job

To create a new job, simply press the "New Job" button to start the New Job Wizard. The wizard will guide you through the Job creation process, allowing you to view and enter the most commonly used features for a particular Job type. To enter additional information or to view the full features of the PDF Automation Server Job properties, select the Edit Job properties check box on the Output Page at the end of the wizard.

**Note:** *At each step the wizard will check to make sure that all fields have been correctly filled out and you will be prevented from going to the next step until all options validate correctly.*

## How to Create a New Job

### Step 1: Select a job

Select the [Job Type](#) and some initial settings for the new job you wish to create.

**Job Types:** Use this list to choose the type of job that you would like to create.

**Name:** Enter a descriptive name for the job.

**Delay:** Enter the approximate delay (in seconds) between each scan of the source directory.

**Source:** Choose whether you want to monitor/watch a folder, email account, or ftp server for incoming files.

**Watch a local folder for files:** Choose the local directory to watch for files

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Watch an FTP server for files:** Set the FTP settings for the folder to watch

- FTP Server: the URL of the FTP server
- Path: the directory on the FTP server to watch for files
- User: the user name to access the server
- FTP Password: the password for the user set above

**Check E-mail for attached files:** Set the settings for the email address to check for file attachments. These settings will need to be obtained from your email service provider.

- Server Name: The email server name
- Server Type: POP3 or IMAP
- SSL: Check if the server requires SSL encryption
- Recipient: the email address used to access the server
- Email Password: the password for the user set above

**Password:** Enter a password to use when opening any source PDF documents that are password protected

## Step 2: Store the Original File

Select the options for storing the original files. Using the New Job Wizard, the available options include saving a the file to a folder and posting the file using FTP.

**Save the File to a Folder:** Select the local folder to store the original files

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Post the file using FTP:** Set the FTP server options to store the original files

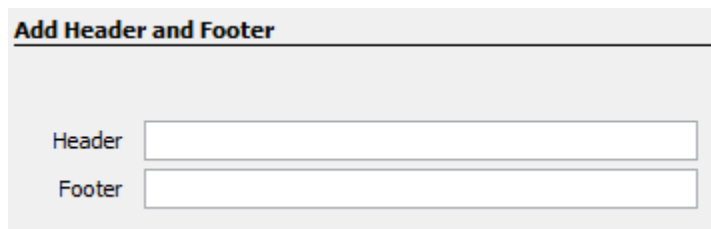
- FTP Server: the URL of the FTP server
- Path: the directory on the FTP server to watch for files
- User: the user name to access the server
- FTP Password: the password for the user set above

## Step 3: Job specific settings

This screen allows you to set some basic settings for the job selected in Step 1.

- Add Headers & Footers

The Add Header and Footer Job is used to add headers and footers to PDF files. The wizard allows to create a simple header or footer that is centered horizontally on PDF documents pages.



The screenshot shows a web form titled "Add Header and Footer". It contains two text input fields. The first field is labeled "Header" and the second field is labeled "Footer". Both fields are empty and have a light gray border.


**Header** - Enter the text to be used for a centered header.

**Footer** - Enter the text to be used for a centered footer.

See [Add Headers and Footers](#) which offers more options than the Wizard.

- Add Watermarks

The Add Watermark Job is used to add text or image watermarks to PDF files. The wizard allows you to create a simple watermark from text or an image file centered on the PDF document. Edit the job properties to see additional settings.



You have the option to add either a text or image watermark to the document. The options will change based on whether or not text or image is selected.

### Text Watermark Options

**Text** - Enter the text to be displayed on the watermark. By default this text will be at a 45 degree angle centered on the page

### Image Watermark Options

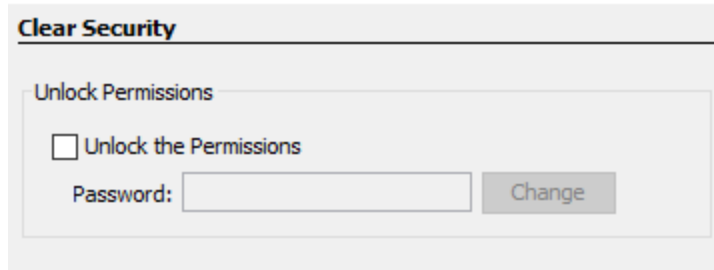
**File** – the full path to the image file on the server to watch for files. Accepted formats are jpg, png, gif, & tiff.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

See [Add Watermarks](#) which offers more options than the Wizard.

- Clear Security

The Clear Security Job is used to remove permissions and passwords in PDF files. This Job is very simple as there are no options on how to clear the security. After the security is cleared, there are options for routing of the output file after optionally changing its name. The tab has the following sections:



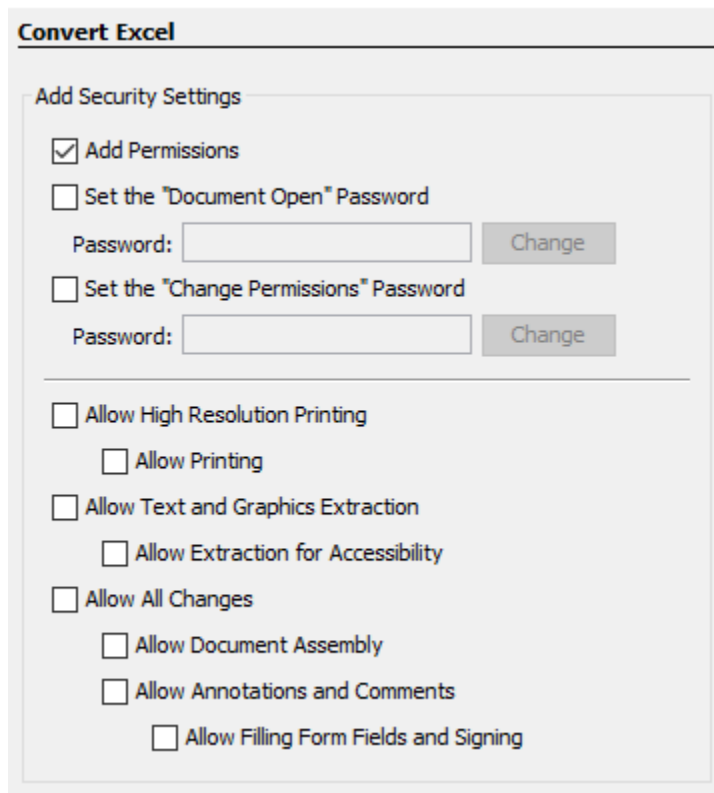
The 'Clear Security' dialog box has a title bar 'Clear Security'. Below it is a section titled 'Unlock Permissions'. Inside this section, there is a checkbox labeled 'Unlock the Permissions'. Below the checkbox is a text input field labeled 'Password:' and a 'Change' button.

**Unlock Permissions** - Use this section to enter a password to open the document if the document is password protected. If the document is not password protected, leave this section un-selected.

See [Clear Security](#) which offers more options than the Wizard.

- Convert Excel Documents

The Convert Excel to PDF job allows to convert Microsoft® Excel documents to PDF. The basic wizard options allow to set the security options on the output PDF document.



The 'Convert Excel' dialog box has a title bar 'Convert Excel'. Below it is a section titled 'Add Security Settings'. Inside this section, there are three checkboxes: 'Add Permissions' (checked), 'Set the "Document Open" Password', and 'Set the "Change Permissions" Password'. Each of the last two checkboxes has a text input field labeled 'Password:' and a 'Change' button. Below this section is a horizontal line, followed by a list of permissions, each with a checkbox: 'Allow High Resolution Printing', 'Allow Printing', 'Allow Text and Graphics Extraction', 'Allow Extraction for Accessibility', 'Allow All Changes', 'Allow Document Assembly', 'Allow Annotations and Comments', and 'Allow Filling Form Fields and Signing'.

## Add Permissions

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

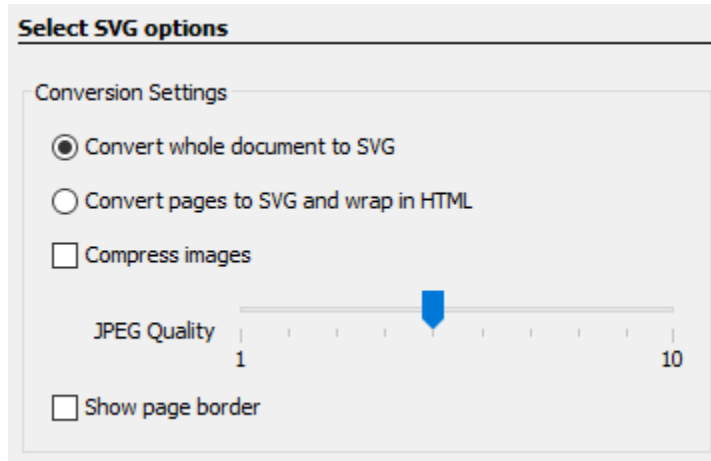
**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

See [Convert Excel to PDF](#) which offers more options than the Wizard to export files to images or send them to the printer

- Convert PDF to HTML5

The Convert To HTML5 tab allows the user to set options when converting a PDF document to either an SVG document or an HTML wrapped around the SVG.



### Conversion Settings

**Convert whole document to SVG** - converts the PDF document to a single .svg file

**Convert pages to SVG and wrap in HTML** - converts the PDF document to an SVG image and then wraps the image in HTML so that it can be displayed in any web browser

**Compress Images** - will convert images to JPEG lossy compression that will reduce image quality and size

**JPEG quality** - This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.

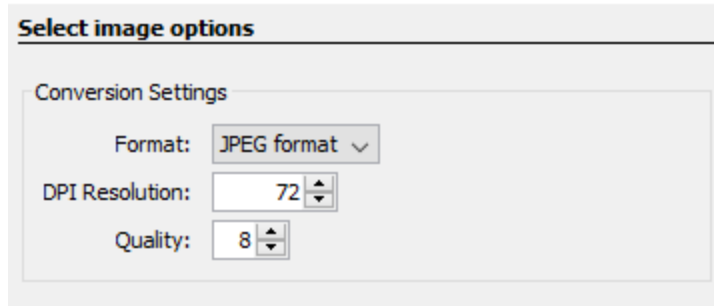
**Show page border** - adds a single pixel black border on the PDF page.

See [Convert to HTML5](#) which offers more options than the Wizard.

- Convert PDF to Images

The Convert to Images Job is used to convert the pages of a PDF document to a series of images.





## Conversion Settings

**Format** - The image format used when converting the PDF documents to images

**JPEG** - lossy compression that will reduce image quality and size

- **Quality:** This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.
- **Extension:** Choose to save the file as either .jpeg or .jpg

**PNG** - Lossless compression does not reduce quality and has no additional options

**TIFF** - Lossless compression does not reduce quality but allows for more than one image per file and additional compression formats

- **Compression:** Select the specific compression type for the TIFF image. The available TIFF compressions are: CCITT\_RLE(B&W), Group 3 Fax (B&W), Group 4 Fax (B&W), Pack Bits, LZW, ZLib, Deflate, JPEG, No Compression.
- **One TIFF Per Page:** By default TIFF images will be created into a single file containing multiple images. Check this option to instead generate a separate TIFF image for each page.

See [Convert to Images](#) which offers more options than the Wizard.

- Convert PDF to PDF/A

The Convert to PDF/A job allows you to convert PDF documents to the PDF/A sub-format for archiving. The basic wizard options allow to set some options when converting PDF to PDF/A. Edit the job properties to see additional settings.

**Select PDF/A options**

PDF/A conversion options

Unsupported Annotations	Fail
Transparency	Fail
Embedded Files	Fail

If conversion fails

- ☐ Add annotations to document
- ☐ Append report to document

## Profile

Select the PDF/A format you wish to convert the documents too. For more details on each of the formats see [Convert PDF to PDF/A](#)

**PDF/A-1b:** Use of PDF 1.4

**PDF/A-2b:** Use of ISO 32000-1

**PDF/A-3b:** Use of ISO 32000-1 with support for embedded files

## PDF/A conversion options

**Unsupported Annotations** - Choose whether to "Delete" any unsupported annotations or to "Fail" (i.e. do not convert the original PDF to PDF/A).

**Transparency** - Choose whether to "Remove" any transparency in the document or to "Fail" (i.e. do not convert the original PDF to PDF/A).

**Embedded Files** - Choose whether to "Delete" any embedded file in the document or to "Fail" (i.e. do not convert the original PDF to PDF/A).

## If conversion fails

Use this section to set the settings to apply when the conversion of the document to PDF/A fails:

**Add annotations to document** - Check this box to add annotations when there were specific issues with the document that prevented it from being converted to PDF/A.

**Append report to document** - Choose this box to add a report at the end of the document with issues that prevented it from being converted to PDF/A.

See [Convert PDF to PDF/A](#) which offers more options than the Wizard.

- Convert Text to PDF

This job is used to convert text documents to PDF. The basic wizard options allow to define the formatting of the new PDF document:

**Convert Text to PDF**

**Convert Text to PDF**

**Page Size**

Width: 8.5

Height: 11

Units: Inches

**Margins**

Top: 1

Bottom: 1

Left: 1

Right: 1

**Font**

Font: Helvetica

Size: 11

**B** **I**

## Page Size

**Width** - The width of the newly created PDF document

**Height** - The height of the newly created PDF document

**Units** - Units to use when calculating the position of the header and footer. This can be inches, points, centimeters, or millimeters. Points are calculated in the PDF standard, 72 points per inch.

## Margins

**Top** - The distance of the margin from the top

**Bottom** - The distance of the margin from the bottom

**Left** - The distance of the margin from the left

**Right** - The distance of the margin from the right

## Font

**Font** - The font for the header and footer

**Font Size** - The font size for the header and footer

**B** - Makes all of the text **Bold**

**I** - Makes all of the text *Italic*

See [Convert Text to PDF](#) which offers more options than the Wizard.

- Convert Word Documents

The Convert Word to PDF job allows to convert Microsoft® Word documents to PDF. The basic wizard options allow to set the security options on the output PDF document.

The screenshot shows a 'Convert Word' dialog box with a 'Security Settings' section. It includes checkboxes for 'Add Permissions', 'Set the "Document Open" Password', and 'Set the "Change Permissions" Password'. Each password setting has a text input field and a 'Change' button. Below these are several other permissions: 'Allow High Resolution Printing', 'Allow Printing', 'Allow Text and Graphics Extraction', 'Allow Extraction for Accessibility', 'Allow All Changes', 'Allow Document Assembly', 'Allow Annotations and Comments', and 'Allow Filling Form Fields and Signing'.

## Add Permissions

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

See [Convert Word to PDF](#) which offers more options than the Wizard to export files to images or send them to the printer

- Crop Pages

The Crop/Resize Pages Job is used to crop PDF documents. The wizard has options to modify the Crop, Trim, Bleed, and Art boxes and to also specify the page range that should be modified.

**Set Crop Margins**

Box

☒ Crop Box ☐ Bleed Box ☐ Trim Box ☐ Art Box

☐ Crop / Resize Crop Box

Margins

Units: Inches

Top:  in Left:  in

Bottom:  in Right:  in

Crop page range

☒ All ☐ Pages in the range

from  to

## Box

**Crop box** – the region to which the contents of the page are to be or cropped when displayed or printed.

**Bleed box** – the bounds to which the contents of the page should be clipped when output in a production environment.

**Trim box** – the intended dimensions of the finished page after trimming.

**Art box** – the extent of the page’s meaningful content (including potential white space) as intended by the document creator.

## Margins

**Units** - Select the measurement unit for the crop margins in either Inches, Points, Centimeters, or Millimeters

**Top** - The distance of the margin from the top

**Bottom** - The distance of the margin from the bottom

**Left** - The distance of the margin from the left

**Right** - The distance of the margin from the right

### Crop Page Range

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

See [Crop Page Job](#) which offers more options than the Wizard.

- Custom Job

The Custom Job allows you to define your own workflow with all the flexibility provided by Java programming language. Custom jobs also give access to all the advanced PDF functions available in Qoppa's [jPDFProcess PDF library](#) making it possible to inspect or manipulate the PDFs as part of the process.

[PDF Automation Server Custom Job API](#)

## How to Define your Own Custom Job

Defining your own custom job will require some programming in Java. After creating the Custom Job using the [Job Creation Wizard](#), you will need to edit the job properties and use built in code editor to define the job.

To get you started, follow the link below to our knowledgebase with examples of implementations of custom processes:

[PDF Automation Server Custom Job Examples](#)

**Note:** *More custom process samples will be added to the knowledgebase to show how the concept can be extended to process PDF documents based on anything in the documents including Metadata or document info, form field data, text content, security or digital signatures contained in the PDF.*

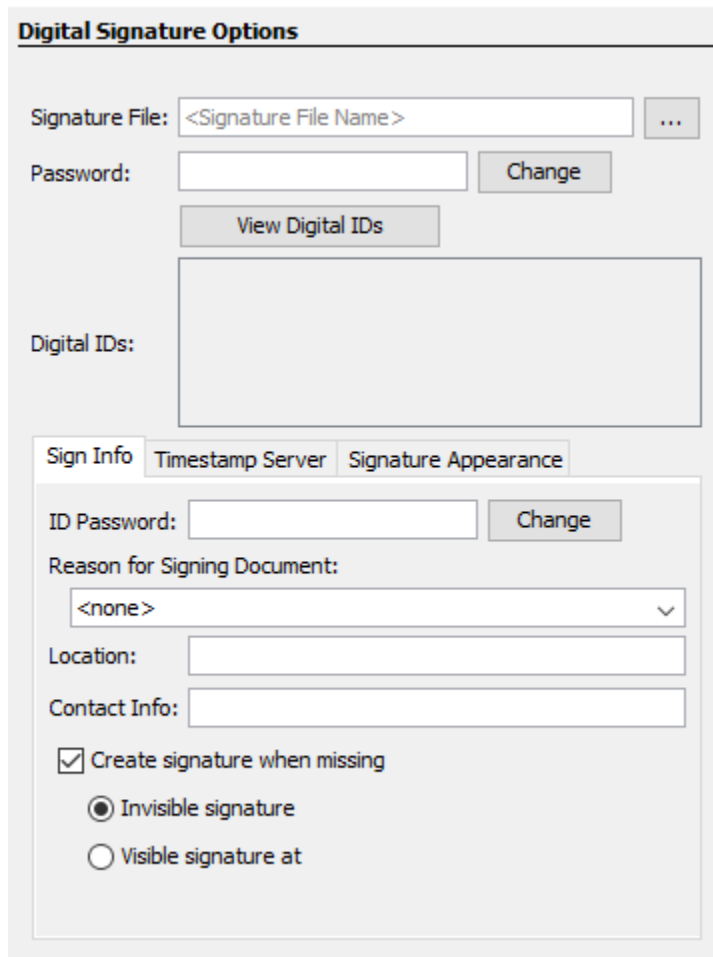
## Let Us Create a Custom Job for You

If you need help with defining your own custom process, we can do the coding for you. Please contact us using the form found on our [PDF consulting page](#).

- Digitally Sign PDF



The Sign PDF Job is used to digitally sign PDF documents as they are received. The Digital Signature wizard options are used to enter the settings for signing the documents:



The image shows a 'Digital Signature Options' dialog box. It has a title bar with the text 'Digital Signature Options'. Below the title bar, there are several input fields and buttons. The 'Signature File' field contains the text '<Signature File Name>' and has a browse button '...'. The 'Password' field is empty and has a 'Change' button. Below the password field is a 'View Digital IDs' button. The 'Digital IDs' field is a large empty box. At the bottom, there are three tabs: 'Sign Info', 'Timestamp Server', and 'Signature Appearance'. The 'Sign Info' tab is selected. It contains an 'ID Password' field with a 'Change' button, a 'Reason for Signing Document' dropdown menu with '<none>' selected, a 'Location' field, and a 'Contact Info' field. There is also a checkbox 'Create signature when missing' which is checked, and two radio buttons: 'Invisible signature' (selected) and 'Visible signature at'.

**Signature File** - The full path to the Digital ID file used in the signature on the server. Accepted formats are .p12 & .pfx.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Password** - The password needed to open the Digital ID file

**View Digital IDs** - When clicked will display the Digital IDs stored within the file

**Digital IDs** - Displays a list of all the digital IDs stored within the signature file

## Signature Information

**ID Password** - The password for the selected digital ID. You must enter the correct password in order to be able to digitally sign the document

**Reason for Signing Document** - Select a reason the document was signed from the list from the below options

- I approve this document
- I am the author of this document
- I have reviewed this document
- I attest to the accuracy and integrity of this document
- I agree to the terms defined by this document

**Location** - Enter additional location details

**Contact Information** - Enter additional contact information for the signature

**Create signature when missing** - Check this option to create a signature even if there is no signature field present in the document

**Create invisible signature** - will create an invisible signature within the document

**Create visible signature at** - will create a signature at the location specified below

- **X:** the "X" location of the top left corner of the signature
- **Y:** the "Y" location of the top left corner of the signature
- **Width:** the width in pixels of the signature
- **Height:** the height in pixels of the signature
- **Page:** the page to place the signature in the document. You can set the First Page, Given Page, or Last Page.

## Timestamp Server

**Use Timestamp Server** - the URL of the timestamp server

**TSA Requires Authentication** - check this box if the server requires authentication

**User name** - the user name for authentication on the timestamp server

**Password** - the password for authentication on the timestamp server

## Signature Appearance

### Image

**Show Image** - When checked an image can be added to the background of the digital stamp appearance

**Transparency** - Transparency setting for the image

**File** - The full path to the image file used in the signature on the server. Accepted formats are jpg, png, gif, & tiff.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Align** - Allows you to align the image on the left, center, or right of the signature

### Text

**Show** - The options below, when checked, set which digital signature properties will be displayed on the signature

- **Name:** The large text that will display the name
- **Digitally signed by:** Adds the text "Digitally signed by" before the Common Name
- **Date:** Date the signature was completed
- **Common Name:** The name associated with the digital ID
- **Organizational Unit:** The organizational unit associated with the digital ID
- **Organization Name:** The organization name associated with the digital ID
- **Locality/City:** the locality/city associated with the digital ID
- **State:** The state associated with the digital ID
- **Country:** The country associated with the digital ID
- **Email:** The email associated with the digital ID

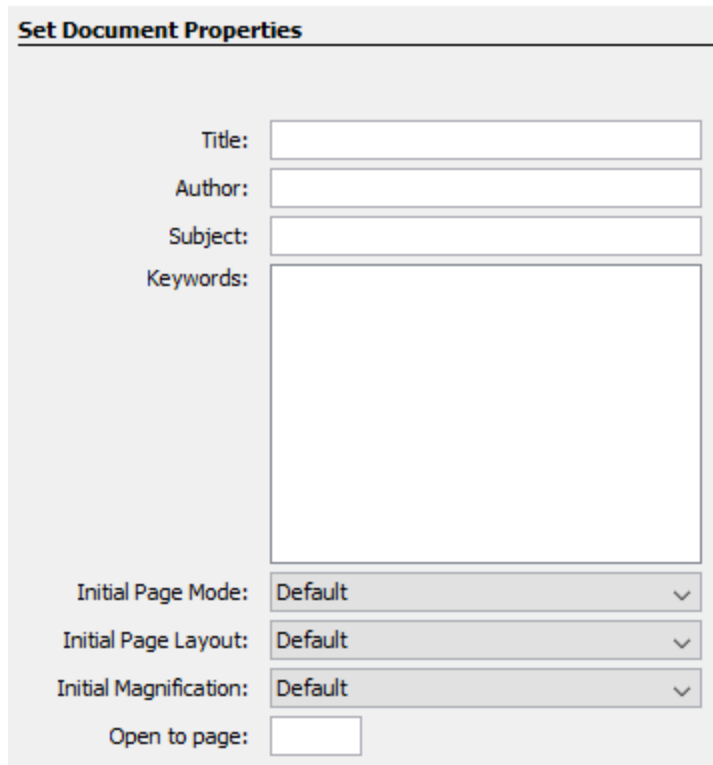
**Orientation** - Sets the digital signature text to be displayed with one of two options

- **Left to Right:** Displays the Name on the left and all other properties in smaller text on the right
- **Right to Left:** Displays the Name on the right and all other properties in smaller text on the left

See [Digitally Sign PDF](#) which offers more options than the Wizard.

- Edit Document Properties

The Edit Document Properties Job is used to modify the document property information. The options available when editing document properties are as follows:



**Set Document Properties**

Title:

Author:

Subject:

Keywords:

Initial Page Mode:

Initial Page Layout:

Initial Magnification:

Open to page:

**Title** - Displays the current Title of the document. Can also be edited if desired

**Author** - Displays the current Author of the document. Can also be edited if desired

**Subject** - Displays the current Subject of the document. Can also be edited if desired

**Keywords** - Displays the current Keywords of the document. Can also be edited if desired

**Initial Page Mode** - Sets the default behavior for the navigation tab when the document is opened

- Default: Uses the default settings for the application the document is opened in
- Page Only: No navigation tab will be displayed
- Bookmarks Panel and Page: Displays the bookmarks panel when the document is opened
- Pages Panel and Page: Displays the pages panel when the document is opened

- Attachments Panel and Page: Displays the attachments panel when the document is opened
- Full Screen Mode: Displays the document in full screen mode when opened

**Initial Page Layout** - Sets the default behavior for the page layout when the document is opened

- Default: Uses the default settings for the application the document is opened in
- Single: Displays only a single individual page at a time
- Single Continuous: Displays all of the document's pages in a single column that can be continuously scrolled
- Facing: Displays only two pages at a time side by side with odd pages on the left and even pages on the right
- Facing Continuous: Displays all of the documents pages in two columns with odd pages on the left and even pages on the right

**Initial Magnification** - Sets the default magnification for the document when opened

- Default: Uses the default settings for the application the document is opened in
- Actual Size: Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling
- Fit to Page: Scales the view to fit the width of the document in the PDF viewer frame
- Fit to Width: Scales the view to fit the entire document within the PDF viewer frame
- %: Sets the zoom to the specified number value

**Open to Page** - Sets the page number to be displayed when the document is opened

See [Edit Document Properties](#) which offers more options than the Wizard.

- Export Annotations

The Export Annotations Job is used to extract annotations from PDF documents. The options available when extracting annotations are as follows:



The screenshot shows a dialog box titled "Select export format". Inside, there is a section labeled "Export Field Values". Below this, there is a label "Export Format:" followed by a dropdown menu. The dropdown menu currently displays "fdf" and has a small downward arrow on the right side.

**Export Format** - Choose the export format (.fdf, .xfdf)

**FDF:** File format created by Adobe that is supported by most PDF applications

**XFDF:** Extended FDF file format created by Adobe that is supported by most PDF applications

See [Export Annotations](#) which offers more options than the Wizard.

- Export Field Values

The Export Field Values Job is used to extract field values from interactive PDF forms. The options available when extracting field values are as follows:



The screenshot shows a dialog box titled "Select export format". Inside, there is a section labeled "Export Field Values". Below this, there is a label "Export Format:" followed by a dropdown menu that currently displays "fdf".

**Export Format** - Choose the export format (.fdf, .xfdf, .xdp, .xml)

**FDF:** File format created by Adobe that is supported by most PDF applications

**XFDF:** Extended FDF file format created by Adobe that is supported by most PDF applications

**XDP:** An XML Data package created by Adobe that is supported by most PDF applications

**XML:** File format that is similar to an Excel file that will contain all of the annotation information

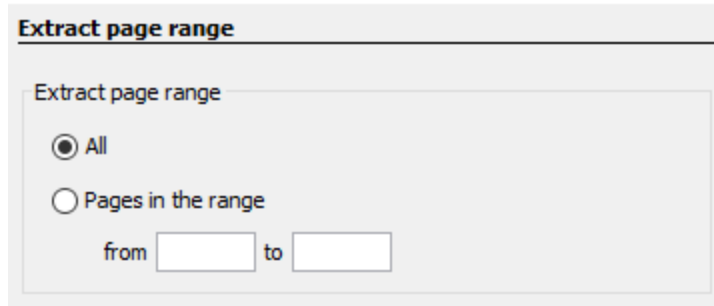
**Use field value as filename** - Check this option if you wish to use a value from a field within the document to name the exported file

**Field** - The EXACT name of the field to use for the filename

See [Export Field Values](#) which offers more options than the Wizard.

- Extract Text

The Extract Text Job is used to extract text from PDF documents to text files. The options available when extracting text are as follow:



**Extract Page Range** - Use this section to specify the range of pages text will be extracted from.

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

See [Extract Text](#) which offers more options than the Wizard.

- Flatten Annotations

The Flatten Annotations Job is used to flatten annotations in PDF documents. The options available when flattening fields are as follow:



**Paint Non Printable Annotations** - Check this box to paint non-printable annotations in the output flattened PDF document. Non-printable annotations are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

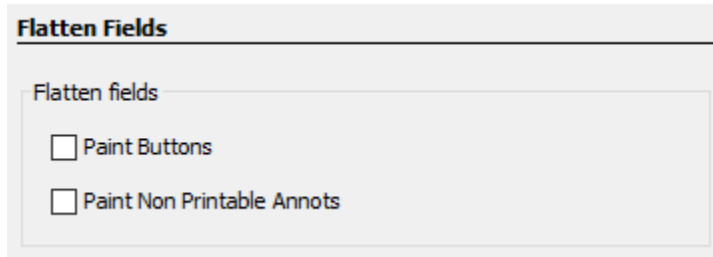
**Note:** *There are specific types of annotations that will never be flattened:*

- *Redaction Annotations (the markings before redactions are applied)*
- *Links*
- *File Attachment Annotations*
- *Sound Annotations*

See [Flatten Annotations](#) which offers more options than the Wizard.

- Flatten Fields

The Flatten Fields Job is used to flatten fields in PDF interactive forms. The option available when flattening fields are as follow:



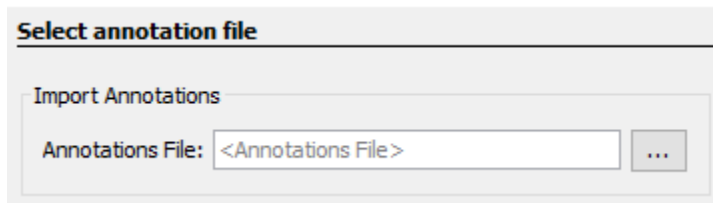
**Paint Buttons** - Check this option to paint form field buttons directly on the document.

**Paint Non Printable Fields**- Check this box to paint non-printable fields in the output flattened PDF document. Non-printable fields are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

See [Flatten Fields](#) which offers more options than the Wizard.

- Import Annotations

The Import Annotations Job is used to add annotations to a PDF. The options available when importing annotations are as follows:



**Annotations File** - The full path to the annotations file used to import to the PDFs on the server. Accepted formats are .fdf & .xfdf

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

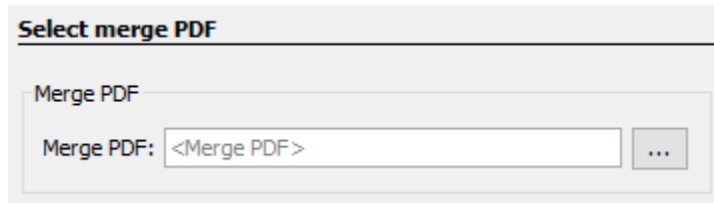
See [Import Annotations](#) which offers more options than the Wizard.

- Import Field Values



The Import Field Values Job is used to merge form data with a specific interactive PDF form set in the job settings. The options available when importing field values are as follows:

- Import Field Values - Merge PDF - Enter the path to the source PDF form that the fields values should be imported to.



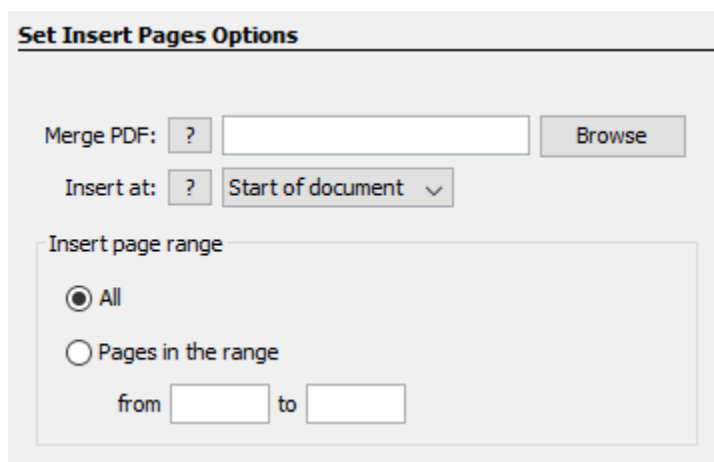
**Merge PDF** - The full path to the source PDF form that the fields values should be imported to.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

See [Import Fields](#) which offers more options than the Wizard.

- Insert Pages

The Insert Pages Job is used to insert pages from a specific PDF document into the documents currently being processed. The options available when inserting PDF pages are as follows:



**Merge PDF** - The full path to the source PDF form that you wish to insert pages from.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Insert at** - Specifies where to insert the pages of the Merge PDF in the document that is processed.

- **Start of document:** inserts the pages from the Merge PDF in the beginning of the document
- **End of document:** inserts the pages from the Merge PDF in the end of the document
- **After page:** inserts the pages from the Merge PDF after a designated page number

### Insert Page Range

Use this section to specify the pages from the Merge PDF to insert into the PDF documents being processed.

**Extract Range** - Use this section to specify which pages from the merge document to insert.

**All** - inserts all pages from the merge document into the PDF

**Pages in the range** - inserts only the pages in the designated range (if the pages exist)

See [Insert Pages](#) which offers more options than the Wizard.

- Move Files with No Processing

The Move Files Job is used to move files that require no PDF specific processing. There is no information that can be entered in the wizard. Create the new Job then [Edit the Job Properties](#) to view the available options for this Job type.

- Optimize PDF

The Optimize PDF Job is used to reduce PDF file size. The wizard will create an optimize PDF job that uses standard default optimization options. There are no specific options to enter in the wizard, the standard optimization options below are automatically set when created but can be edited through the job properties if needed.

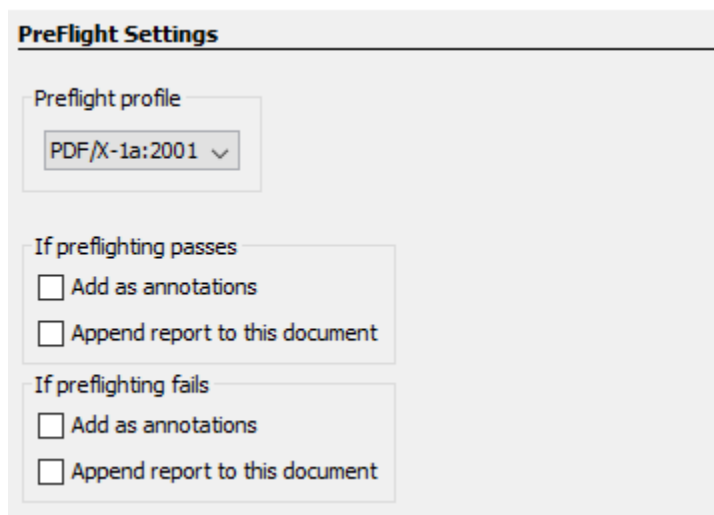
- Color Images
  - Compression = JPEG - Quality = 5

- DPI = 150
- Grayscale Images
  - Compression = JPEG - Quality = 5
  - DPI = 150
- B&W Images
  - Compression = JBIG2
  - DPI = 300
- Object Removal
  - Alternate Images, Unused Resources, Embedded Thumbnails
- Other
  - Flatten All Comments, Flate Uncompressed Streams, Merge Duplicate Images, Merge Duplicate Fonts

See [Optimize PDF](#) to edit specific optimization options.

- Preflight

This job is used to verify document compliance PDF/X standards. The options available for this job are:



**Preflight Settings**

Preflight profile  
PDF/X-1a:2001 ▾

If preflighting passes

☐ Add as annotations

☐ Append report to this document

If preflighting fails

☐ Add as annotations

☐ Append report to this document

**Preflight Profile** - Select the standard that you wish to verify

- PDF/X-1a:2001 - ISO 15930-1
- PDF/X-1a:2003 - ISO 15930-4
- PDF/X-3:2002 - ISO 15930-3
- PDF/X-3:2003 - ISO 15930-6
- PDF/A-1b - ISO 19005-1 Level B

## If Preflighting Passes

Determines what happens to the document if it passes the selected Preflight Profile.

### Result Options

- **Add as annotations:** When checked, will add an annotation for each preflight error with the details of the error in the annotation comment
- **Append report to this document:** When checked, appends a Preflight Results report to the end of the document

## If Preflighting Fails

Determines what happens to the document if it fails the selected Preflight Profile.

**Note:** *This only applies to failing preflighting specifically. Any issues that fail being processed or preflighted will use the settings set in the [Trouble Handling](#) tab.*

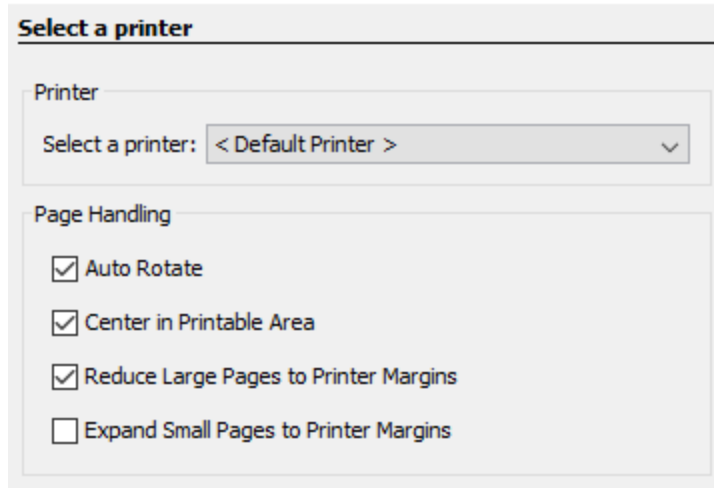
### Result Options

- **Add as annotations:** When checked, will add an annotation for each preflight error with the details of the error in the annotation comment
- **Append report to this document:** When checked, appends a Preflight Results report to the end of the document

See [Preflight](#) which offers more options than the Wizard.

- Print PDF Files

The Print PDF Job is used to send PDF documents to a printer as they are received. The options allow the user to set different job properties such as choosing the printer to send the document to, setting page ranges and more:



**Select a Printer** - Select the printer you wish to use here. When the job is running and the printer you selected now is not available, then the current system default printer will be selected instead.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

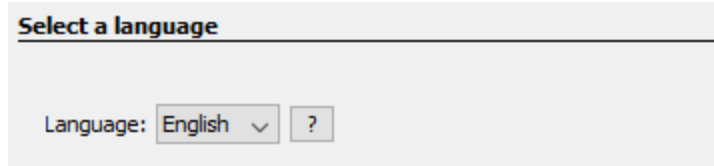
**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

See [Print PDF Files](#) which offers more options than the Wizard.

- Recognize Text Using OCR

The Recognize text using OCR job allows to recognize and add text into scanned PDF documents.



**Select a language**

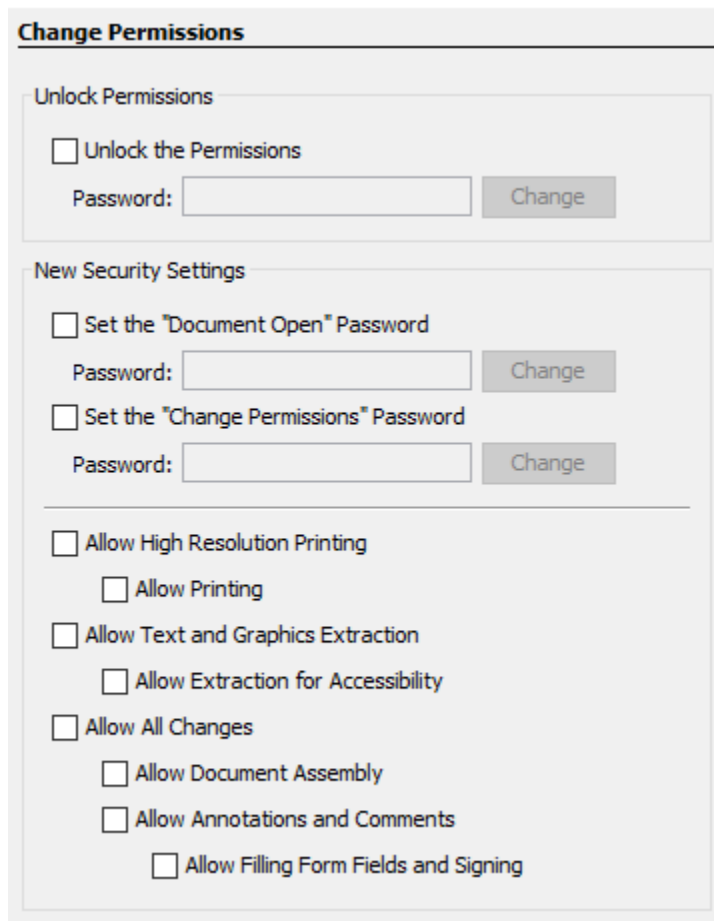
Language: English ▾ ?

**Language** - Select the language to use when recognizing text.

See [Recognize Text Using OCR](#) which offers more options than the Wizard.

- Set Passwords & Permissions

The Change Permissions Job is used to set the permission settings of a PDF file. This wizard allows you to set the following options for the permissions.



**Change Permissions**

**Unlock Permissions**

☐ Unlock the Permissions

Password:

**New Security Settings**

☐ Set the "Document Open" Password

Password:

☐ Set the "Change Permissions" Password

Password:

☐ Allow High Resolution Printing

☐ Allow Printing

☐ Allow Text and Graphics Extraction

☐ Allow Extraction for Accessibility

☐ Allow All Changes

☐ Allow Document Assembly

☐ Allow Annotations and Comments

☐ Allow Filling Form Fields and Signing

## Unlock the Permissions

Use this section to set the passwords to try when unlocking the permissions before setting the new permission settings.

**Passwords to Try:** To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the process.

## New Security Settings

### Compatibility

**Compatibility** - Sets the compatibility for the PDF security in the converted document. The options are either Acrobat 5.0 (High 128-bit RC4) and later or Acrobat 7.0 (High 128-bit AES) and later.

### Security for Document

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

### Security for Permissions

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

### Permissions

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

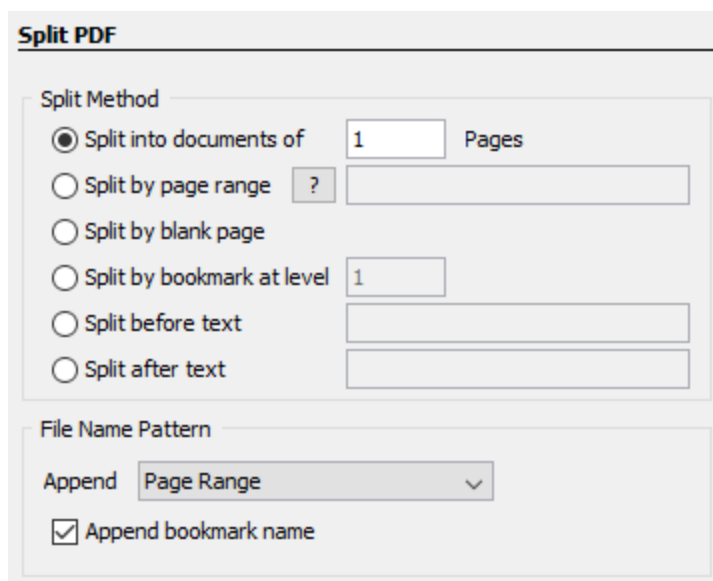
**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

See [Set Passwords & Permissions](#) which offers more options than the Wizard.

- Split PDF

The Split PDF Job is used to split PDF documents into multiple documents as they are received. The options allow to split incoming documents by page count, page range, bookmarks, blank page or search text.



The screenshot shows a configuration window titled "Split PDF". It contains two main sections: "Split Method" and "File Name Pattern".

**Split Method:** This section has six radio button options, each with an associated input field:

- ☒ Split into documents of:  Pages
- ☐ Split by page range:
- ☐ Split by blank page
- ☐ Split by bookmark at level:
- ☐ Split before text:
- ☐ Split after text:

**File Name Pattern:** This section includes a dropdown menu and a checkbox:

- Append:  (dropdown arrow)
- ☒ Append bookmark name



## Split Method

Use this section to tell PAS how to split the document into multiple documents. The available options in this section are:

**Split into documents of** - Use this method to split the document into equal size documents of a given number of pages. Enter the page count in the text field.

**Split by page range** - Use this method to split the document into multiple documents based on page range. Enter the page range in the text field. Dash is used for a page range, comma to separate pages within the same document, semicolon to separate documents. So for instance, 1, 3-5; 7-10 will output two documents, the first document with pages 1, 3, 4, and 5, and the second document with pages 7, 8, 9, and 10.

**Split by blank page** - Use this method to split the document when a white page is encountered. The white page will be used as a separator between documents and will be discarded.

***Note:** If the page was created from a scanned document the page may appear blank but will actually contain a solid white image and so the page is not viewed as blank.*

**Split by bookmark at level** - Use this method to split the document based on bookmarks at level 1. You can also choose to split up to a higher level, for instance up to level 3. In this case, the document will be split at bookmark level 1, level 2, and level 3. In this method, we assume that the bookmarks contain Go To Page actions within the PDF document itself and that the bookmarks have been created in ascending page order.

**Split before text** - Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the first page of the next document.

**Split after text** - Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the last page of the document and the following page will become the first page of the next document.

## File Name Pattern

Use this section to tell PAS how to name the output PDF files (the PDF documents obtained by splitting the incoming document):

**Append** - For each output PDF file, you can choose to append the page range or an incremental counter starting at any given number. PAS will start with the original PDF file name.

***Note:** The original PDF file name can first be altered using the [Change the PDF File Name](#) section below).*

- **Page Range:** When selected, PAS will append a string containing the page range. (for example: test\_p4-p6.pdf). When the "Split by page range" option is selected, the page range formula will be appended as a string (for example: the page range formula "1,3,5-10" will name the file test\_1\_3\_5-10.pdf).

***Note:** An underscore character precedes the page range formula and commas are replaced with an underscore character.*

- **Incremental Counter Starting at:** When selected, PAS will append an incremental counter. The counter will be reset for each new incoming PDF file.

**Append bookmark name** - This option is only available when the "Split by bookmarks" option is selected. This will append the name of the starting bookmark to the output documents names. So for instance if "Cover Page" is the first bookmark name, the first output document will could be named test\_p1-p1\_CoverPage.pdf. Only letters, numbers, hyphen and underscore characters are preserved in the bookmark name to guarantee that all operating systems will accept this file name. Commas are replaced with an underscore.

See [Split PDF](#) which offers more options than the Wizard.

## Step 4: Output/Finish options

The final step allows you to set the output folder and also select a printer and printing options for the processed output file. The final option also allows you to start the Job immediately. If not started immediately you will have to start the job manually when ready.

### Output File Options

**Save the output file to a folder:** Set the location to save the output files.

**Print the output file:** When checked the output file will be printed using the options set

**Printer:** Select the printer on the attached to the server machine to print from

**Note:** *This list will only display printers attached to the server not the PAS Manager.*

**Auto Rotate:** rotate the printout to match the width and length with the paper.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Shrink Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

### **Start the Job**

Select this option to immediately start and run the job on the server.

## Job Types

PDF Automation Server has the following job types available when processing PDF documents.

- [Add Headers and Footers](#): Options when adding headers and footers to PDF documents.
- [Add Watermarks](#): Options when adding watermarks to PDF documents.
- [Clear Security](#): Options when clearing security on PDF documents.
- [Convert Excel Documents](#): Options when converting Excel documents to PDFs
- [Convert PDF to HTML5](#): Options when converting a PDF to HTML5
- [Convert PDF To Images](#): Options when converting a PDF to images.
- [Convert PDF To PDF/A](#): Options when converting a PDF to PDF/A sub-format.
- [Convert Text to PDF](#): Options when converting text documents to PDF.
- [Convert Word Documents](#): Options when converting Word documents to PDF and images.
- [Crop Pages](#): Options when cropping PDF documents including Crop Box margins and page numbers.
- [Custom Job](#): Allows you to setup a custom job created by Qoppa
- [Digitally Sign PDF](#): Options when applying digital signatures to PDF documents.
- [Edit Document Properties](#): Options when editing PDF document properties.
- [Export Annotations](#): Options when exporting PDF annotations.
- [Export Field Values](#): Options when exporting field values from PDF forms.
- [Extract Text](#): Options when extracting text from PDF documents.
- [Flatten Annotations](#): Options when flattening annotations in PDF documents.
- [Flatten Fields](#): Options when flattening interactive fields in PDF forms.
- [Import Annotations](#): Options when importing annotations into PDF documents.
- [Import Field Values](#): Options when importing field data into interactive PDF forms.
- [Insert Pages](#): Options when inserting pages into PDF documents.
- [Move Files with No Processing](#): Options when moving or transferring (PDF) documents.
- [Optimize PDF](#): Options when optimizing PDF documents.
- [Preflight](#): Options when checking preflight document compliance (PDF/X and PDF/A)
- [Print PDF Files](#): Options when printing PDF documents such as what printer to send it to.
- [Recognize Text Using OCR](#): Options when recognizing and adding text to PDF documents using OCR.
- [Set Security \(Passwords and Permissions\)](#): Options when setting passwords & permissions on PDF documents.
- [Split PDF](#): Options on how to split PDF documents by page, bookmarks, text or blank page.

# Add Headers & Footers

The Add Header Footer tab is used to add headers and footers to PDF files. The tab allows the user to set options regarding the headers and footers and then allows for routing of the output file after optionally changing its name. The tab has the following sections:

## Headers / Footers Settings

Use this section to set options regarding the headers and footers that will be applied to the PDF documents when being processed.

### Margins

**Units** - Units to use when calculating the position of the header and footer. This can be inches, centimeters, or points. Points are calculated in the PDF standard, 72 points per inch.

**Top** - The distance of the margin from the top

**Bottom** - The distance of the margin from the bottom

**Left** - The distance of the margin from the left

**Right** - The distance of the margin from the right

**Note:** *The top margin applies to headers only, the bottom margin applies to footers only.*

### Appearance

**Font** - The font for the header and footer

**Font Size** - The font size for the header and footer

**Font Color** - The font color for the header and footer

**B** - Makes all of the text **Bold**

**I** - Makes all of the text *Italic*

**Border** - Sets a border around the header and footer text

**Background** - Background color settings for the header and footer text

## Pages

**Page Range** - The range of pages to apply headers and footers.

- All Pages: all pages in the document
- First Page: only adds headers and footers to the first page of each document
- Last Page: only adds headers and footers to the last page of each document
- Page Range: set the page range using the From and To options
- Even Pages Only: only adds headers and footers the even pages
- Odd Pages Only: only adds headers and footers the odd pages

## Header & Footer

This section defines the text content for the different mark areas in the document

**Header Left** - Text placed in the left of the header

**Header Center** - Text placed in the center of the header

**Header Right** - Text placed in the right of the header

**Footer Left** - Text placed in the left of the footer

**Footer Center** - Text placed in the center of the footer

**Footer Right** - Text placed in the right of the footer

**Insert** - Use these options to insert custom variables within the content sections. Place the cursor where you would like the text and then click on the variable option you want to insert. These variables will be used when the headers and footers are placed on the document

- Date - creates a date variable
- Page Number - creates a page number variable
- Bates Number - creates a bates number variable
- Other - displays a list of other supported variables
  - \$page – The page number
  - \$totalpages – The number of pages in the document
  - \$filename – The file name that the document was opened from
  - \$filepath – The full file path that the document was opened from
  - \$date – The current date formatted as Nov 28, 2007
  - \$shortdate – The current date formatted as 11/28/07
  - \$time – The current time
  - \$day – The current day of the month

- \$month – The current month, using two digits
- \$year – The current year, using four digits
- \$shortyear – The current year, using two digits
- \$second – The current second
- \$minute – The current minute
- \$hour – The current hour, 1-12
- \$ampm – AM or PM
- \$longhour – The current hour, 0-23

## Preview

Allows you to see how the header and footer will look on a PDF document of your choice. Click "Browse" to select a document to use for the preview. You can use the arrow buttons and drop down to navigate and preview a different page in the document. Once complete click on "Go Back" to return to the header & footer settings.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*



**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Add Watermarks

The Add Watermark tab is used to add a text or image watermark to PDF files. The tab allows the user to set options regarding the watermark and then allows for routing of the output file after optionally changing its name. The tab has the following sections:

### Watermark Settings

Use this section to set options regarding the watermark that will be applied to the PDF documents.

#### Appearance

**Units** - Units to use when calculating the position of the watermark. This can be inches, centimeters, millimeters, or points. Points are calculated in the PDF standard, 72 points per inch.

**Horizontal** – The horizontal location is relative to the left, right, or center of the page according to the choice in the drop down box. The number entered here is interpreted in units.

**Vertical** – The vertical location is relative to the top, bottom, or center of the page according to the choice in the drop down box. The number entered here is interpreted in units.

**Rotation** – Rotate the watermark (text or image) by the given degrees clockwise.

**Transparency** – Transparency of the watermark. 100% is invisible and 0% is opaque.

#### Pages

**Page Range** - The range of pages to add watermarks to.

- All Pages: adds watermarks to all pages in the document
- First Page: only adds a watermark to the first page of each document
- Last Page: only adds a watermark to the last page of each document
- Page Range: set the page range using the From and To options
- Even Pages Only: only adds watermarks the even pages
- Odd Pages Only: only adds watermarks the odd pages

#### Watermark

You have the option to add either a text or image watermark to the document. The options will change based on whether or not text or image is selected.

## Text Watermark Options

**Text** - Enter the text to be displayed on the watermark

**Insert** - Use these options to insert custom variables within the content sections. Place the cursor where you would like the text and then click on the variable option you want to insert. These variables will be used when the headers and footers are placed on the document

- Date - creates a date variable
- Page Number - creates a page number variable
- Bates Number - creates a bates number variable
- Other - displays a list of other supported variables
  - \$page – The page number
  - \$totalpages – The number of pages in the document
  - \$filename – The file name that the document was opened from
  - \$filepath – The full file path that the document was opened from
  - \$date – The current date formatted as Nov 28, 2007
  - \$shortdate – The current date formatted as 11/28/07
  - \$time – The current time
  - \$day – The current day of the month
  - \$month – The current month, using two digits
  - \$year – The current year, using four digits
  - \$shortyear – The current year, using two digits
  - \$second – The current second
  - \$minute – The current minute
  - \$hour – The current hour, 1-12
  - \$ampm – AM or PM
  - \$longhour – The current hour, 0-23

**Font** - The font for the watermark

**Font Size** - The font size for the watermark

**Font Color** - The font color for the watermark




**B** - Makes all of the text **Bold**

**I** - Makes all of the text *Italic*

**Border** - Sets a border around the watermark text

**Background** - Background color settings for the watermark text

**Alignment** - choose how the text should be aligned

-  Aligns the text to the left
-  Aligns the text in the center
-  Aligns the text to the right

## Image Watermark Options

**File** – the full path to the image file on the server to watch for files. Accepted formats are jpg, png, gif, & tiff.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Scale** – The scale to apply to the image (100% for the full-size image)

## Preview

Allows you to see how the header and footer will look on a PDF document of your choice. Click "Browse" to select a document to use for the preview. You can use the arrow buttons and drop down to navigate and preview a different page in the document. Once complete click on "Go Back" to return to the header & footer settings.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*



**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Clear Security

The Clear Security tab is used when the permissions and passwords in a PDF file need to be removed. The tab is very simple as there are no options on how to clear the security. After the security is cleared, there are options for routing of the output file after optionally changing its name. The tab has the following sections:

- **Unlock the Permissions** - Use this section to enter passwords to open the document if the document is password protected. If the document is not password protected, leave this section un-selected.
- **Clear Security** - There are no options in this section, the section is displayed for information only.

### Clear Security Settings

This function will open PDF files and clear any permission security present in the file. There are no options to this function.

### Clear Security

Clears all permissions and grants all permissions if the file is unlocked successfully.

### Unlock the Permissions

Enter a password to use when attempting to clear the document security.

**Passwords to Try:** To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the process.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.



- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Convert Excel Documents to PDF

The Convert Excel tab is used to convert Microsoft® Excel files to PDF files. It also allows to export the files to images and to send them to the printer. The tab allows the user to set security and permissions on the output PDF file, convert it to images and route it after optionally changing its name. The tab has the following sections:

## Add Permissions

### Compatibility

**Compatibility** - Sets the compatibility for the PDF security in the converted document. The options are either Acrobat 5.0 (High 128-bit RC4) and later or Acrobat 7.0 (High 128-bit AES) and later.

### Security for Document

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

### Security for Permissions

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

### Permissions

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also

automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

## Convert to Images

In addition to converting the Microsoft® Word files to PDF an image of the file can also be created. This section sets the options when converting the document to images.

### Image Creation Rules

**DPI Resolution** - Resolution in DPI used to render the page, 72 is the PDF native resolution.

**Format** - The image format used when converting the PDF documents to images

**JPEG** - lossy compression that will reduce image quality and size

- **Quality:** This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.
- **Extension:** Choose to save the file as either .jpeg or .jpg

**PNG** - Lossless compression does not reduce quality and has no additional options

**TIFF** - Lossless compression does not reduce quality but allows for more than one image per file and additional compression formats

- **Compression:** Select the specific compression type for the TIFF image. The available TIFF compressions are: CCITT\_RLE(B&W), Group 3 Fax (B&W), Group 4 Fax (B&W), Pack Bits, LZW, ZLib, Deflate, JPEG, No Compression.
- **One TIFF Per Page:** By default TIFF images will be created into a single file containing multiple images. Check this option to instead generate a separate TIFF image for each page.

## Page Range

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

## File Naming Rules

**Start with the PDF file name** - Check this option to have the file name start with the file name of the PDF document

**Add** - Enter additional text to append to the end of the file name

**Note:** *Page number and file extension will be appended to the pattern to create the file name.*

**Minimum Digits in Page Number (Zero Pad)** - the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.



- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Convert PDF to HTML5

The Convert To HTML5 tab allows the user to set options when converting a PDF document to either an SVG document or an HTML wrapped around the SVG. The tab has the following sections:

### Conversion Settings

This section sets the options when converting the document to images.

**Convert whole document to SVG** - converts the PDF document to a single .svg file

**Convert pages to SVG and wrap in HTML** - converts the PDF document to an SVG image and then wraps the image in HTML so that it can be displayed in any web browser

**Compress Images** - will convert images to JPEG lossy compression that will reduce image quality and size

**JPEG quality** - This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.

**Show page border** - adds a single pixel black border on the PDF page.

### Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")

- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.



# Convert PDF to Images

The Convert To Images tab allows the user to set options when converting a PDF document to a series of images. The tab has the following sections:

## Conversion Settings

This section sets the options when converting the document to images.

### Image Creation Rules

**DPI Resolution** - Resolution in DPI used to render the page, 72 is the PDF native resolution.

**Format** - The image format used when converting the PDF documents to images

**JPEG** - lossy compression that will reduce image quality and size

- **Quality:** This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.
- **Extension:** Choose to save the file as either .jpeg or .jpg

**PNG** - Lossless compression does not reduce quality and has no additional options

**TIFF** - Lossless compression does not reduce quality but allows for more than one image per file and additional compression formats

- **Compression:** Select the specific compression type for the TIFF image. The available TIFF compressions are: CCITT\_RLE(B&W), Group 3 Fax (B&W), Group 4 Fax (B&W), Pack Bits, LZW, ZLib, Deflate, JPEG, No Compression.
- **One TIFF Per Page:** By default TIFF images will be created into a single file containing multiple images. Check this option to instead generate a separate TIFF image for each page.

### Page Range

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

## File Naming Rules

**Start with the PDF file name** - Check this option to have the file name start with the file name of the PDF document

**Add** - Enter additional text to append to the end of the file name

***Note:** Page number and file extension will be appended to the pattern to create the file name.*

**Minimum Digits in Page Number (Zero Pad)** - the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Convert to PDF/A

The PDF/A tab is used to convert PDF files to PDF/A. It also allows to save the files, print them or send them. The tab has the following sections:

### PDF/A Conversion Settings

#### Profile

Select the PDF/A format you wish to convert the documents too.

**PDF/A-1b:** Use of PDF 1.4 to create a “minimal compliance” level for PDF/A. PDF/A-1b requirements are meant to ensure that the rendered visual appearance of the file is reproducible over the long-term. It requires exact visual reproduction only.

**PDF/A-2b:** A new development of PDF/A to address some of the new feature added with versions 1.5, 1.6 and 1.7 of the PDF Reference. PDF/A-2 is backwards compatible, i.e. all valid PDF/A-1 documents should also be compliant with PDF/A-2. However PDF/A-2 compliant files will not necessarily be PDF/A-1 compliant. Based on PDF 1.7 (as defined in ISO 32000-1) which supports a range of improvements in document technology such as JPEG2000 compression, transparency effects and layers, the embedding of OpenType fonts, and provisions for digital signatures in accordance with the PDF Advanced Electronic Signatures standard. PDF/A-2 also allows archiving of sets of PDF/A compliant documents as individual documents in one file.

**Note:** *The PDF/A-2 support for JPEG 2000 is restricted in ways that increase compatibility with PDF/X, e.g., constraining the number of colour channels (to 1, 3, or 4)*

**PDF/A-3b:** adds one feature to PDF/A-2. Permitting the embedding within a PDF/A file (or files) in any other format, not just other PDF/A files (as permitted in PDF/A-2). This has important implications for archival

**Note:** *In a PDF/A-3 file, any embedded files should be considered 'non-archival'. In other words, the embedded file is considered as only of short-term or temporary use. Only the primary PDF content with its visible page display should be considered as 'archived' for the long term.*

#### PDF/A conversion options

**Unsupported Annotations** - Choose whether to "Delete" any unsupported annotations or to "Fail" (i.e. do not convert the original PDF to PDF/A).



**Transparency** - Choose whether to "Remove" any transparency in the document or to "Fail" (i.e. do not convert the original PDF to PDF/A).

**Embedded Files** - Choose whether to "Delete" any embedded file in the document or to "Fail" (i.e. do not convert the original PDF to PDF/A).

## If conversion fails

Use this section to set the settings to apply when the conversion of the document to PDF/A fails:

**Add annotations to document** - Check this box to add annotations when there were specific issues with the document that prevented it from being converted to PDF/A.

**Append report to document** - Choose this box to add a report at the end of the document with issues that prevented it from being converted to PDF/A.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Convert Text to PDF

This tab is used to convert text documents to PDF and then allows for routing of the output file after optionally changing its name. The tab has the following sections:

## Text to PDF Settings

These options set the formatting for the PDF that is created from the text document.

### Page Size

**Width** - The width of the newly created PDF document

**Height** - The height of the newly created PDF document

**Units** - Units to use when calculating the position of the header and footer. This can be inches, points, centimeters, or millimeters. Points are calculated in the PDF standard, 72 points per inch.

### Margins

**Top** - The distance of the margin from the top

**Bottom** - The distance of the margin from the bottom

**Left** - The distance of the margin from the left

**Right** - The distance of the margin from the right

### Font

**Font** - The font for the header and footer

**Font Size** - The font size for the header and footer

**B** - Makes all of the text **Bold**

**I** - Makes all of the text *Italic*

## Background

**Use Background** - Sets an image to be used as the background on the newly created document. Enter the full path to the image file on the server. Accepted formats are jpg, png, & tiff.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.



**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If

that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

## Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Convert Word Documents to PDF

The Convert Word job is used to convert Microsoft® Word files to PDF files. It also allows to export the files to images and to send them to the printer. The tab allows the user to set security and permissions on the output PDF file, convert it to images and route it after optionally changing its name. The tab has the following sections:

## Add Permissions

### Compatibility

**Compatibility** - Sets the compatibility for the PDF security in the converted document. The options are either Acrobat 5.0 (High 128-bit RC4) and later or Acrobat 7.0 (High 128-bit AES) and later.

### Security for Document

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

### Security for Permissions

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

### Permissions

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also

automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

## Convert to Images

In addition to converting the Microsoft® Word files to PDF an image of the file can also be created. This section sets the options when converting the document to images.

### Image Creation Rules

**DPI Resolution** - Resolution in DPI used to render the page, 72 is the PDF native resolution.

**Format** - The image format used when converting the PDF documents to images

**JPEG** - lossy compression that will reduce image quality and size

- **Quality:** This is the quality of JPEG compression. It varies from 0 (very high compression, very low quality), to 10 (low compression, very high quality) based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.
- **Extension:** Choose to save the file as either .jpeg or .jpg

**PNG** - Lossless compression does not reduce quality and has no additional options

**TIFF** - Lossless compression does not reduce quality but allows for more than one image per file and additional compression formats

- **Compression:** Select the specific compression type for the TIFF image. The available TIFF compressions are: CCITT\_RLE(B&W), Group 3 Fax (B&W), Group 4 Fax (B&W), Pack Bits, LZW, ZLib, Deflate, JPEG, No Compression.
- **One TIFF Per Page:** By default TIFF images will be created into a single file containing multiple images. Check this option to instead generate a separate TIFF image for each page.

## Page Range

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

## File Naming Rules

**Start with the PDF file name** - Check this option to have the file name start with the file name of the PDF document

**Add** - Enter additional text to append to the end of the file name

**Note:** *Page number and file extension will be appended to the pattern to create the file name.*

**Minimum Digits in Page Number (Zero Pad)** - the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.



## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Crop Pages

The Crop/Resize Pages tab is used to crop the PDF document. The tab has options to modify the Crop, Trim, Bleed, and Art boxes and to also specify the page range that should be modified. After the document is cropped, there are options for routing of the output file after optionally changing its name. The tab has the following sections:

## Crop Pages Settings

### Box

**Crop box** – the region to which the contents of the page are to be or cropped when displayed or printed.

**Bleed box** – the bounds to which the contents of the page should be clipped when output in a production environment.

**Trim box** – the intended dimensions of the finished page after trimming.

**Art box** – the extent of the page’s meaningful content (including potential white space) as intended by the document creator.

### Margins

**Units** - Select the measurement unit for the crop margins in either Inches, Points, Centimeters, or Millimeters

**Top** - The distance of the margin from the top

**Bottom** - The distance of the margin from the bottom

**Left** - The distance of the margin from the left

**Right** - The distance of the margin from the right

### Page Range

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

#### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

#### Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name



**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Custom Job

The Custom Job allows you to define your own workflow with all the flexibility provided by Java programming language. Custom jobs also give access to all the advanced PDF functions available in Qoppa's [jPDFProcess PDF library](#) making it possible to inspect or manipulate the PDFs as part of the process.

[PDF Automation Server Custom Job API](#)

### How to Define your Own Custom Job

Defining your own custom job will require some programming in Java. After creating the Custom Job using the [Job Creation Wizard](#), you will need to edit the job properties and use built in code editor to define the job.

To get you started, follow the link below to our knowledgebase with examples of implementations of custom processes:

[PDF Automation Server Custom Job Examples](#)

**Note:** *More custom process samples will be added to the knowledgebase to show how the concept can be extended to process PDF documents based on anything in the documents including Metadata or document info, form field data, text content, security or digital signatures contained in the PDF.*

### Let Us Create a Custom Job for You

If you need help with defining your own custom process, we can do the coding for you. Please contact us using the form found on our [PDF consulting page](#).

## Digitally Sign PDF

The Sign PDF tab is used to digitally sign PDF documents as they are received. After the document is signed, there are options for routing of the output file. The tab has the following sections:

### Digital Signature Settings

The following options are available to choose the signature, set a timestamp server, or modify the appearance.

**Signature File** - The full path to the Digital ID file used in the signature on the server. Accepted formats are .p12 & .pfx.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Password** - The password needed to open the Digital ID file

**View Digital IDs** - When clicked will display the Digital IDs stored within the file

**Digital IDs** - Displays a list of all the digital IDs stored within the signature file

### Signature Information

**ID Password** - The password for the selected digital ID. You must enter the correct password in order to be able to digitally sign the document

**Reason for Signing Document** - Select a reason the document was signed from the list from the below options

- I approve this document
- I am the author of this document
- I have reviewed this document
- I attest to the accuracy and integrity of this document
- I agree to the terms defined by this document

**Location** - Enter additional location details

**Contact Information** - Enter additional contact information for the signature

**Create signature when missing** - Check this option to create a signature even if there is no signature field present in the document

**Create invisible signature** - will create an invisible signature within the document

**Create visible signature at** - will create a signature at the location specified below

- **X:** the "X" location of the top left corner of the signature
- **Y:** the "Y" location of the top left corner of the signature
- **Width:** the width in pixels of the signature
- **Height:** the height in pixels of the signature
- **Page:** the page to place the signature in the document. You can set the First Page, Given Page, or Last Page.

## Timestamp Server

**Use Timestamp Server** - the URL of the timestamp server

**TSA Requires Authentication** - check this box if the server requires authentication

**User name** - the user name for authentication on the timestamp server

**Password** - the password for authentication on the timestamp server

## Signature Appearance

### Image

**Show Image** - When checked an image can be added to the background of the digital stamp appearance

**Transparency** - Transparency setting for the image

**File** - The full path to the image file used in the signature on the server. Accepted formats are jpg, png, gif, & tiff.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Align** - Allows you to align the image on the left, center, or right of the signature

## Text

**Show** - The options below, when checked, set which digital signature properties will be displayed on the signature

- Name: The large text that will display the name
- Digitally signed by: Adds the text "Digitally signed by" before the Common Name
- Date: Date the signature was completed
- Common Name: The name associated with the digital ID
- Organizational Unit: The organizational unit associated with the digital ID
- Organization Name: The organization name associated with the digital ID
- Locality/City: the locality/city associated with the digital ID
- State: The state associated with the digital ID
- Country: The country associated with the digital ID
- Email: The email associated with the digital ID

**Orientation** - Sets the digital signature text to be displayed with one of two options

- Left to Right: Displays the Name on the left and all other properties in smaller text on the right
- Right to Left: Displays the Name on the right and all other properties in smaller text on the left

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.



**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")

- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Edit Document Properties

The Edit Document Properties tab is used to modify the document property information and its initial view properties. After the document properties are edited, there are options for routing of the output file. The tab has the following sections:

## Document Property Settings

**Title** - Displays the current Title of the document. Can also be edited if desired

**Author** - Displays the current Author of the document. Can also be edited if desired

**Subject** - Displays the current Subject of the document. Can also be edited if desired

**Keywords** - Displays the current Keywords of the document. Can also be edited if desired

**Initial Page Mode** - Sets the default behavior for the navigation tab when the document is opened

- Default: Uses the default settings for the application the document is opened in
- Page Only: No navigation tab will be displayed
- Bookmarks Panel and Page: Displays the bookmarks panel when the document is opened
- Pages Panel and Page: Displays the pages panel when the document is opened
- Attachments Panel and Page: Displays the attachments panel when the document is opened
- Full Screen Mode: Displays the document in full screen mode when opened

**Initial Page Layout** - Sets the default behavior for the page layout when the document is opened

- Default: Uses the default settings for the application the document is opened in
- Single: Displays only a single individual page at a time
- Single Continuous: Displays all of the document's pages in a single column that can be continuously scrolled
- Facing: Displays only two pages at a time side by side with odd pages on the left and even pages on the right
- Facing Continuous: Displays all of the documents pages in two columns with odd pages on the left and even pages on the right

**Initial Magnification** - Sets the default magnification for the document when opened

- Default: Uses the default settings for the application the document is opened in

- **Actual Size:** Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling
- **Fit to Page:** Scales the view to fit the width of the document in the PDF viewer frame
- **Fit to Width:** Scales the view to fit the entire document within the PDF viewer frame
- **%:** Sets the zoom to the specified number value

**Open to Page** - Sets the page number to be displayed when the document is opened

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

#### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If

that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.



## Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Export Annotations

The Export Annotations tab is used when extracting annotations from PDF documents. After the annotations are exported, there are options for routing of the output file. The tab has the following sections:

## Export Annotation Settings

**Export Format** - Choose the export format (.fdf, .xfdf)

**FDF:** File format created by Adobe that is supported by most PDF applications

**XFDF:** Extended FDF file format created by Adobe that is supported by most PDF applications

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

*Note: This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)



**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Export Fields

The Export Field Values tab is used when extracting fields values from interactive PDF forms. After the field values are exported, there are options for routing of the output file. The tab has the following sections:

### Export Field Value Settings

**Export Format** - Choose the export format (.fdf, .xfdf, .xdp, .xml)

**FDF:** File format created by Adobe that is supported by most PDF applications

**XFDF:** Extended FDF file format created by Adobe that is supported by most PDF applications

**XDP:** An XML Data package created by Adobe that is supported by most PDF applications

**XML:** File format that is similar to an Excel file that will contain all of the annotation information

**Use field value as filename** - Check this option if you wish to use a value from a field within the document to name the exported file

**Field** - The EXACT name of the field to use for the filename

### Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Extract Text

The Extract Text tab is used when extracting text from PDF documents to text files. After the text has been extracted, there are options for routing of the output file. The tab has the following sections:

### Export Text Settings

**Extract Range** - Use this section to specify the range of pages text will be extracted from.

**All** - Converts all the pages of the document

**Pages in the range** - Converts only the pages in the designated range (if the pages exist)

### Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.



## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

*Note: This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Flatten Annotations

The Flatten Annotations tab is used when flattening annotations in PDF documents. After the annotations have been flattened, there are options for routing of the output file. The tab has the following sections:

### Flatten Annotation Settings

**Paint Non Printable Annotations** - Check this box to paint non-printable annotations in the output flattened PDF document. Non-printable annotations are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

**Note:** *There are specific types of annotations that will never be flattened:*

- *Redaction Annotations (the markings before redactions are applied)*
- *Links*
- *File Attachment Annotations*
- *Sound Annotations*

### Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If



you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Flatten Fields

The Flatten Fields tab is used when flattening fields in PDF interactive forms. After the fields have been flattened, there are options for routing of the output file. The tab has the following sections:

### Flatten Fields Settings

**Paint Buttons** - Check this option to paint form field buttons directly on the document.

**Paint Non Printable Fields**- Check this box to paint non-printable fields in the output flattened PDF document. Non-printable fields are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

### Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If

you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)



**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Import Annotations

The Import Annotations tab is used to import annotations into a PDF. After the annotations have been imported, there are options for routing of the output file. The tab has the following sections:

## Import Annotation Settings

### Import Annotations

**Annotations File** - The full path to the annotations file used to import to the PDFs on the server. Accepted formats are .fdf & .xfdf

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Flatten Annotations

**Paint Non Printable Annotations** - Check this box to paint non-printable annotations in the output flattened PDF document. Non-printable annotations are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

***Note:** There are specific types of annotations that will never be flattened:*

- *Redaction Annotations (the markings before redactions are applied)*
- *Links*
- *File Attachment Annotations*
- *Sound Annotations*

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Import Field Values

The Import Field Values tab is used to import form data into a specific PDF form. The job will take any found field values (.fdf, .xfdf, .xdp, .xml) and import them into the selected PDF document. After the field values have been imported, there are options for routing of the output file. The tab has the following sections:

## Import Field Values Settings

### Import Field Values

**Merge PDF** - The full path to the source PDF form that the fields values should be imported to.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Use field value as filename** - Check this option if you wish to use a value from a field within the document to name the exported file. Click on "Choose Field" to pick from a list of available fields in the document.

### Flatten Fields

**Paint Buttons** - Check this option to paint buttons directly on the document.

**Paint Non Printable Fields**- Check this box to paint non-printable fields in the output flattened PDF document. Non-printable fields are those with the "Printable" flag set to false or visibility set to "Show/Do not Print".

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.



## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Insert Pages

The Insert Pages tab is used to insert PDF pages into the documents when they are processed. After the pages have been merged, there are options for routing of the output file. The tab has the following sections:

### Insert Pages Settings

**Merge PDF** - The full path to the source PDF form that you wish to insert pages from.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Insert location** - Specifies where to insert the pages of the Merge PDF in the document that is processed.

- **Start of document:** inserts the pages from the Merge PDF in the beginning of the document
- **End of document:** inserts the pages from the Merge PDF in the end of the document
- **After page:** inserts the pages from the Merge PDF after a designated page number

### Insert Page Range

Use this section to specify the pages from the Merge PDF to insert into the PDF documents being processed.

**Extract Range** - Use this section to specify which pages from the merge document to insert.

**All** - inserts all pages from the merge document into the PDF

**Pages in the range** - inserts only the pages in the designated range (if the pages exist)

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

### Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)



## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)

- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Move Files with No Processing

The Move Files tab is used to specify actions that are useful when moving or transferring files. This Job can be used when PDF specific processing is not required. The options available when moving files with no processing are as follows:

### Move Files Settings

#### Change the File Name

Use this section to change the name of the PDF file before saving.

#### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

#### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")

- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the File to a Folder

Use this section to save the file to a folder after setting the permissions.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

*Note: This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)

- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## Post the File using FTP

Use this section to send the file to an FTP server after setting the permissions.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## Send the File in an E-Mail

Use this section to send the file by e-mail after setting the permissions.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Optimize PDF

The Optimize PDF tab is used to optimize PDF documents and reduce file size. After the document has been optimized, there are options for routing of the output file. The tab has the following sections:

## Optimize Settings

### Image Processing

PDF Automation Server can process images contained within the document using a variety of settings:

**Image Compression** - Convert any image to either a JPEG, JPEG2000, FLATE, or JBIG2.

- **JPEG** - lossy compression that will reduce image quality and size
- **JPEG2000** - less lossy compression that will reduce size and some quality
- **FLATE** - Lossless compression does not reduce quality but may not always reduce file size
- **JBIG2** - Lossless compression that can only support black and white color space. Color images will be converted to black and white. Best for scanned documents with no images

**Image Quality** - Allows the image quality to be adjusted between 10-100%.

***Note:** This will only affect JPEG or JPEG2000 images as these are the only formats that support image quality settings.*

**Image Color Space** - Choose to either retain or convert the image colors to Grayscale or B&W.

- **Grayscale** - Only supported with JPEG, JPEG2000, or FLATE. Best for full color images
- **B&W** - Only supported by FLATE or JBIG2. Best for scanned documents with no images

***Note:** When the retain option is selected CMYK images will be converted to RGB due to a regression bug in Java 1.7.*

**DPI (Dots per Inch) Resolution** - Adjust the image resolution of all images that are larger than the option selected



- Preset options include retain, 50, 100, 150, 200, 300, & 600 DPI
- Custom option allows user to set any value between 50-1200 DPI

## Object Removal

PDF Automation Server can remove the following objects from within a PDF:

**Alternate Images** - Removes alternate embedded image dictionaries that are used for high resolution printing to reduce file size. Only visible images displayed on the PDF while viewing will be kept in the document.

**Bookmarks** - Removes all bookmarks from the PDF document

**Document Info** - Removes any document information located in the document properties (Document->Document Properties) that would include the following:

- Title
- Author
- Subject
- Keywords
- Producer

**JavaScript Actions** - This will remove all JavaScript actions from the PDF document but retain any objects that may have had JavaScript actions such as form fields, push buttons, etc...

**Embedded Thumbnails** - Removes page thumbnails that are stored in the PDF document. Once removed the page thumbnails will just be rendered each time the document is loaded.

**Comments** - Removes all annotations and comments from the PDF document

**Links** - Removes all links from the PDF document

**Attachments** - Removes any attachments that are stored within the document

**Form Fields** - Removes all form fields that are on the PDF document

**Metadata** - Removes all additional or extra Metadata from the PDF Document

**Unused Resources** - Removes resources that are located within the document but are never referenced by any objects in the PDF document.

## Other Options

PDF Automation Server has the following additional options available to further compress the PDF document:

**Flatten Comments** - Flattens all annotations including text boxes, shapes, highlights, and stamps directly onto the document so that they can no longer be edited.

***Note:** Annotations such as the sticky note will have comments removed but the image will still be placed on the document*

**Flatten Fields** - Flattens all fields including text boxes, check boxes, radio buttons, combo boxes, list boxes, buttons, and signature fields directly onto the document so that they can no longer be edited. All values within the fields will be flattened as well

**Merge Duplicate Images** - Merges any duplicate images within the PDF so that all objects are referencing the same image resource rather than multiple of the same resource

**Merge Duplicate Fonts** - Merges any duplicate fonts within the PDF so that all objects are referencing the same font resource rather than multiple of the same resource

**Compress Document Objects** - Compresses any additional PDF elements within the document such as page descriptions that have not been optimized by any other process to further reduce file size

**Clear Signatures** - Removes all signatures that are on the PDF Document but will leave the signature field

## Fast Web View

**Convert to Fast Web View** - Fast web view restructures the documents internal structure and content so that the pages load in order. When converting to Fast Web View the content is just reorganized internally. No content is altered or removed so the PDF will be displayed exactly the same as it was prior to conversion.

Converting to fast web view allows large documents to load faster when downloading from a web. Having the document structure and content in a linearized (from beginning to end) order allows a browser to immediately display the first page as the remainder of the document is still being loaded.

**Note:** *In order to see the complete speed benefits the server where the PDF is being hosted must also support page by page loading.*

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

#### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

*Note: This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present

- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Preflight

The user can set separate logic to handle output documents differently, depending on whether they pass or fail preflighting. After the document has passed or failed, there are options for routing of the output file. The tab has the following sections:

## Preflight Settings

**Preflight Profile** - Select the standard that you wish to verify

- PDF/X-1a:2001 - ISO 15930-1
- PDF/X-1a:2003 - ISO 15930-4
- PDF/X-3:2002 - ISO 15930-3
- PDF/X-3:2003 - ISO 15930-6
- PDF/A-1b - ISO 19005-1 Level B

## If Preflighting Passes

Determines what happens to the document if it passes the selected Preflight Profile.

### Result Options

- **Add as annotations:** When checked, will add an annotation for each preflight error with the details of the error in the annotation comment
- **Append report to this document:** When checked, appends a Preflight Results report to the end of the document

## If Preflighting Fails

Determines what happens to the document if it fails the selected Preflight Profile.

**Note:** *This only applies to failing preflighting specifically. Any issues that fail being processed or preflighted will use the settings set in the [Trouble Handling](#) tab.*

### Result Options

- **Add as annotations:** When checked, will add an annotation for each preflight error with the details of the error in the annotation comment
- **Append report to this document:** When checked, appends a Preflight Results report to the end of the document



## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

#### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

#### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

#### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

#### Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Print PDF Files

The Print PDF tab is used when PDF documents will be sent to a printer as they are received. The tab allows the user to set different options such as choosing the printer to send the document to, setting page ranges and more.

## Print PDF Settings

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected now is not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

### Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If

checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the long edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the short edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

# Recognize Text Using OCR

The OCR tab is used to recognize and add searchable text in PDF documents. After the document has been OCR'd, there are options for routing of the output file. The tab has the following sections:

## OCR Settings

**Language** - Select the language to use when recognizing text.

**Note:** *Additional OCR languages can be installed manually by following the instructions here <https://kbdeveloper.qoppa.com/?p=5688>.*

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.



**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

## Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## **Content**

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Set Passwords & Permissions

The Change Permissions tab is used in jobs that want to set the permission settings of a PDF file. After the document permissions have been set, there are options for routing of the output file. The tab has the following sections:

### Unlock the Permissions

Use this section to set the passwords to try when unlocking the permissions before setting the new permission settings.

**Passwords to Try:** To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the process.

### New Security Settings

#### Compatibility

**Compatibility** - Sets the compatibility for the PDF security in the converted document. The options are either Acrobat 5.0 (High 128-bit RC4) and later or Acrobat 7.0 (High 128-bit AES) and later.

#### Security for Document

**Set the "Document Open" Password** – also known as the user password, it is the password that will be required when the documents are opened.

#### Security for Permissions

**Set the "Change Permissions" Password** – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

#### Permissions

**Allow High Resolution Printing** – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

**Allow Printing** - Allow printing the document

**Allow Text & Graphics Extraction** – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

**Allow Extraction for Accessibility** – Extract text and graphics in support of accessibility to disabled users or other purposes

**Allow Document Changes** – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

**Allow Document Assembly** – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

**Allow Annotations & Comments** – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

**Allow Filling Form Fields & Signing** - Fill in existing interactive form fields including signature fields.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge



**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

# Split PDF

The Split PDF tab allows the user to set options when splitting a PDF document to multiple PDF documents. After the document has been split, there are options for routing of the output file. The tab has the following sections:

## Split Settings

This section sets the options when splitting the document into multiple documents:

### Split Method

Use this section to tell PAS how to split the document into multiple documents. The available options in this section are:

**Split into documents of** - Use this method to split the document into equal size documents of a given number of pages. Enter the page count in the text field.

**Split by page range** - Use this method to split the document into multiple documents based on page range. Enter the page range in the text field. Dash is used for a page range, comma to separate pages within the same document, semicolon to separate documents. So for instance, 1, 3-5; 7-10 will output two documents, the first document with pages 1, 3, 4, and 5, and the second document with pages 7, 8, 9, and 10.

**Split by blank page** - Use this method to split the document when a white page is encountered. The white page will be used as a separator between documents and will be discarded.

**Tolerance** - This value increases the tolerance for artifacts on the page. Increase this value if the blank pages contain marks such as scan lines or fold lines to get better results.

**Split by bookmark at level** - Use this method to split the document based on bookmarks at level 1. You can also choose to split up to a higher level, for instance up to level 3. In this case, the document will be split at bookmark level 1, level 2, and level 3. In this method, we assume that the bookmarks contain Go To Page actions within the PDF document itself and that the bookmarks have been created in ascending page order.

**Split before text** - Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the first page of the next document.

**Split after text** - Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the last page of the document and the following page will become the first page of the next document.

## File Name Pattern

Use this section to tell PAS how to name the output PDF files (the PDF documents obtained by splitting the incoming document):

**Append** - For each output PDF file, you can choose to append the page range or an incremental counter starting at any given number. PAS will start with the original PDF file name.

***Note:** The original PDF file name can first be altered using the [Change the PDF File Name](#) section below).*

- **Page Range:** When selected, PAS will append a string containing the page range. (for example: test\_p4-p6.pdf). When the "Split by page range" option is selected, the page range formula will be appended as a string (for example: the page range formula "1,3,5-10" will name the file test\_1\_3\_5-10.pdf).

***Note:** An underscore character precedes the page range formula and commas are replaced with an underscore character.*

- **Incremental Counter Starting at:** When selected, PAS will append an incremental counter. The counter will be reset for each new incoming PDF file.

**Append bookmark name** - This option is only available when the "Split by bookmarks" option is selected. This will append the name of the starting bookmark to the output documents names. So for instance if "Cover Page" is the first bookmark name, the first output document will could be named test\_p1-p1\_CoverPage.pdf. Only letters, numbers, hyphen and underscore characters are preserved in the bookmark name to guarantee that all operating systems will accept this file name. Commas are replaced with an underscore.

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead rout the document using the settings set in the [Trouble Handling](#) tab.

## Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.

### Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

### Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

### Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

### Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)



## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)

- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

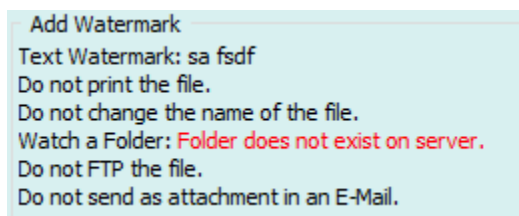
## Editing a Job

# Editing a Job

In PAS Manager select the job you wish to edit and then click on the "Edit" button to view and edit information about the job. When the button is pressed, a new window will open containing all of the job information and settings.

## Job Information Panel

The Job Information Panel is located on the left side of the edit job window. This panel will display a short summary of the job settings. If any of the settings are incorrect a message will be displayed in **RED** text next to the setting. Click on the section in the panel to go directly to the settings tab to adjust those specific settings.



## Job Settings Tabs

The Job Settings Tabs are grouped into sections that contain each of the settings for the job. To change any of these settings click on the appropriate tab name in the Job editor dialog.

- [Job Information](#): This tab contains general job information, such as the name and description and whether the job should be started when the server is started.
- [Source Settings](#): This tab contains information about where to look for incoming PDF documents. The tab allows you to set the polling interval and parameters as well as information specific to the source type. For instance, if the documents are coming in via email, this tab allows for configuration of the email address and server.
- [Storage of Originals](#): Use this tab to tell the automation server what to do with the original PDF documents, before processing. The documents can be renamed and then saved to different folders, sent over FTP, or via email.
- [Job Specific Settings](#): Contains the specific settings based on the [Job Type](#) selected when creating the job.
- [Trouble Handling](#): This tab contains information about how to handle errors when processing a PDF document. PAS can send notification emails whenever there is an error. Additionally, the server can save or send the file that caused the problem to a location so that it can be reviewed and the problem resolved.



## Job Information Details

The Job Information tab contains general job information, such as the name and description and whether the job should be automatically started when the server is started. This tab has the following settings available.

### Job Information Settings

Sets the basic details of the job.

#### Descriptive Data

**Name:** The name of the job. This name will be used when showing the job on the [Job List](#) and should be descriptive enough to identify the job.

**Saved as:** This is the name of the XML file used to store the job information. It is possible to use the operating system to change the file name when the server is not running. Never attempt this while the server is running the job.

**Description:** A longer description for the job. This field can be used to enter more detail about the job for future reference.

**Job Type:** Displays the [Job Type](#) selected at creation.

**Startup:** This field is used to decide whether to start this job when PAS boots up or to let the user start it as needed.

- **Manual:** when set to manual the job will NOT start automatically if the server is restarted. You will have to use PAS Manager to start the job again if the server stops for any reason.
- **Automatic:** will automatically restart the job if the server is restarted.

***Note:** If you set this value and have not carefully tested the job information, then you may see unpredictable results the next time this job is reloaded.*

#### Performance Data

**Most Recent Launch By Server:** The start date and time the task was started by the server.

**Most Recent Error-Free Launch:** The start date and time of the last launch started without any errors.



## Source Settings

The Source Settings tab is used to define where the PDF documents are coming from and how often to look for them. This tab has the following settings available.

### Establish Job Scheduling

Set the job scheduling options in this section.

#### Basic Functions

**Delay (in seconds) before the next watch:** This delay in seconds tells PAS how often to look for PDF documents from a source. This roughly determines how often the server should check to see if there are any files at the watched source. If the server is currently processing an incoming file, it will finish with that file before it attempts to obtain any other files. The server measures this interval from the end of the last watch cycle. If the server is working through several files, it will still check to see if this time has elapsed after finishing each individual file.

#### Look Inside Zip Files:

Select this option to open any incoming file with a ".zip" extension and extract files within it to be processed as part of the job.

**Pattern:** Only the immediate internal files which match the pattern will be submitted for processing, and only those with an extension which is appropriate to the job type. After obtaining the matching files, the zip file, in its entirety, will be deleted. This feature is for implementing a specifically designed process flow that encapsulates the incoming files within transient zip files.

**Order:** Specifies the order in which files within the zip files will be extracted (and thus to be processed).

- **Alphabetical:** processes the files in order by name
- **Timestamp:** processes files based on the creation timestamp

#### Look Inside PDF for Embedded Files:

PDF files such as portfolios can contain embedded files as attachments. Select this option to open any incoming PDF file and extract embedded files within it to be processed as part of the job.



**Pattern:** Only the immediate embedded files which match the pattern will be submitted for processing, and only those with an extension which is appropriate to the job type.

**All embedded files:** Will process all files embedded within the PDF that is able to be processed by the selected job type.

**Selected embedded files:** Enter a range of indices to process only specific embedded files within the incoming PDF files. Enter a single index, an index range, or multiple indices and ranges, separated by commas. For instance 1,3-5,8 will process the first embedded file, files 3 to 5 and file 8.

**Ignore PDF container when portfolio:** Check this if PAS should ignore the PDF container file when it's a portfolio. Most PDF portfolios are indeed only containers and do not need to be processed themselves as part of the job.

## Recovery Options

Set the number of recovery attempts if there are any errors (such as not being able to connect to an email server) and the interval between recovery attempts.

**Recovery Attempts:** the number of attempts the server will make to reach the source folder if an error occurs

**Interval (in minutes):** the amount of time in minutes between each of the recovery attempts

## Watch a Local Folder for Files

Use this section when the PDF document will be placed in a folder on a local or network drive. The section requires the name of the folder and the file pattern to look for.

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**File Pattern:** You may select a file name pattern, including the asterisk character. The server will limit its view to those files which match the pattern. To be processed, a file must make it through this filter, and also have a file extension that matches with the processing capabilities of the job type. You do not need to specifically limit the pattern to the appropriate extensions as the server will check this. If you specify an extension in the pattern that does not match with the process, then no files will make it through to be processed.

## Watch an FTP Server

Use this section if PAS is picking up PDF documents from an FTP server. On every watch interval, PAS will log into the FTP server and check for any files that match the given file pattern. After the files are transferred to a local working folder, they are deleted in the FTP server folder.

**Server:** the URL of the FTP server

**Folder:** the directory on the FTP server to watch for files

**File Pattern:** You may select a file name pattern, including the asterisk character. The server will limit its view to those files which match the pattern. To be processed, a file must make it through this filter, and also have a file extension that matches with the processing capabilities of the job type. You do not need to specifically limit the pattern to appropriate extensions as the server will check this. If you specify an extension in the pattern that does not match with the process, then no files will make it through to be processed.

**User:** the user name to access the server

**Password:** the password for the user set above

## Check E-Mail for Attached Files

Use this section if PDF documents are being delivered via e-mail. On every watch interval, PAS will log into the E-Mail server and check all incoming emails for a given e-mail address. If any e-mails have PDF documents attached, they will be processed by the server and deleted from the email address once processed.

**Server Name:** The email server name

**Recipient:** the email address used to access the server

**Server Type:** POP3 or IMAP

**SSL:** Check if the server requires SSL encryption

**Password:** the password for the user set above

## Set Passwords to Open

Enter a password to use when opening source PDF documents that are password protected

**Passwords to Try:** To set a password click in the password field or on the Edit button. Then enter the password you want to be used when attempting to open a password protected PDF. Do this for up to four passwords to try on password protected PDFs during the process.

## Storage of Originals

The Storage of Originals tab tells PAS what to do with the original PDF files before processing them. Use this tab to save copies of the PDF files locally or to route them to another location before processing them. This tab has the following settings available:

**Note:** *If you do not set a location for the original file it will be deleted once processing has been completed.*

### Change the File Name

Use this section to set how the file name of the original file is handled before being saved to a new location.

#### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

#### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")

- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value:** the starting number of the incremental counter when the task is started
- **Total Digits (zero pad):** the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the File to a Folder

Use this section to have the original file saved to a local directory on the server.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## Post the File using FTP

Use this section to send the original file to a directory on an FTP server.

## Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. *\_1*, *\_2*, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. *\_A*, *\_B*, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## Send the File in an E-Mail

Use this section to send the original file in an e-mail.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. *john@example.com, jane@example.com*)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. *john@example.com, jane@example.com*)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

## Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Job Specific Details

The fourth tab of the Job editor will contain the specific settings for the Job selected as well as the Output Routing options. Each job will have their own set of specific settings that will be shown for that job type. Follow the links below to see the settings available for each job type.

- [Add Headers and Footers](#)
- [Digitally Sign PDF](#)
- [Insert Pages](#)
- [Add Watermarks](#)
- [Edit Document Properties](#)
- [Move Files](#)
- [Clear Security](#)
- [Export Annotations](#)
- [OCR](#)
- [Convert PDF To Images](#)
- [Export Field Values](#)
- [Optimize PDF](#)
- [Convert PDF To PDF/A](#)
- [Extract Text](#)
- [Preflight](#)
- [Convert Text to PDF](#)
- [Flatten Annotations](#)
- [Print PDF](#)
- [Convert Word to PDF](#)
- [Flatten Fields](#)
- [Set Security \(Passwords and Permissions\)](#)
- [Crop Pages](#)
- [Import Annotations](#)
- [Split PDF](#)
- [Custom Job](#)
- [Import Field Values](#)

## Output Routing Options

This section determines what happens once the PDF document has successfully been processed. If the processing fails for any reason the document will instead route the document using the settings set in the [Trouble Handling](#) tab.

### Print the PDF Document

Use this section to print the PDF file as part of processing it. Click on "Edit Details" to set the settings.



## Printer

Select the printer you wish to use here. When the job is running and the printer you selected is now not available, then the current system default printer will be selected instead.

## Print Range

**All:** prints all the pages in the document

**Page Range:** enter a single page, a page range, or multiple pages and ranges, separated by commas.

## Page Handling

**Auto Rotate:** rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

**Center In Printable Area:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

**Reduce Large Pages to Printer Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.

**Expand Small Pages to Printer Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

## Options

**Number of Copies:** the number of copies of the document to be printed

**Collate Sheets:** keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

**Duplex Processing:** the options to print on the front and back of pages

- **Single (no duplex):** prints only one page per sheet
- **Duplex (long edge):** prints two pages per sheet flipping the page on the short edge
- **Tumble (short edge):** prints two page per sheet flipping the page on the long edge

**Print to File:** Use this option to send the printer output to a file instead of the printer. When the option is checked, an output folder is necessary to know where to save the printer output files.

**Output Folder:** the full path to a local directory (on the server) to send the file

***Note:** This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

**Specify Paper Source:** Use this option to select a specific tray for paper source on the selected printer. When this option is left unchecked, the default tray on the printer will be used.

## Change the Output File Name

Use this section to change the name of the PDF file before saving. Click on "Edit Details" to set the settings.

### Renaming Options

**Start with the current file name:** You may use a file name based on the existing file name with some simple modifications. You may specify one string of characters to be removed. If that string is found and deleted, then the replace string will be inserted at the same location. You may also specify a prefix to use at the start of each name, and a suffix to place at the end.

- **If Present Remove:** the text you wish to be removed from the file name if present
- **And Replace With:** the text you wish to replace the text removed above with
- **Add a Prefix:** the text you wish to add to the beginning of the file name
- **Add a Suffix:** the text you wish to add to the end of the file name

**Replace with new file name:** You may replace every incoming file name with a new name. This is useful in some E-Mail situations. If you use this option in other situations, consider appending a counter or time stamp to prevent name conflicts.

- **File Name to Use:** The exact file name you wish to use (excluding extensions such as .pdf, .jpg, etc... as these will automatically be added by the process)

### Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS**: appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD**: appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS**: appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

**Append an incriminating counter:** If you have elected to append a counter, then as long as this value is zero (0) the counter will continue to increment as each file name is prepared. If you set this to any positive integer, then the next time a file name is prepared the new value will be used and the counter will increment from there.

- **Start Value**: the starting number of the incremental counter when the task is started
- **Total Digits (zero pad)**: the number of digits to use in the counter using zeros as padding. For example: if set to 4 digits and the current count value is 15 it will display as "0015"

## Save the Output File to a Folder

Use this section to save the file to a folder after setting the permissions. Click on "Edit Details" to set the settings.

### Location

**Folder Path**: the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

### Save

**In one ZIP file**: when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## FTP the Output File

Use this section to send the file to an FTP server after setting the permissions. Click on "Edit Details" to set the settings.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Save

**In one ZIP file:** when checked all processed files will be placed into a single .ZIP file in the directory chosen.

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## E-Mail the Output File

Use this section to send the file by e-mail after setting the permissions. Click on "Edit Details" to set the settings.

### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

## Trouble Handling

The Trouble Handling tab is used to tell PAS what to do in case there are any errors during processing. Qoppa PAS is able to send notification messages when there are any errors in processing and can save problem PDF documents separately to be able to troubleshoot problems. The tab has the following sections:

### Send an Error Report in an E-Mail

Use this section to send an e-mail with information about the error to an e-mail address. A copy of the servers log file will be attached to the email which can be used to help diagnose the issue.

#### Recipients

**Send List:** the "To:" field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Copy List:** the "Cc:" (carbon copy) field when sending the email. Multiple email addresses can be entered by using a comma and a space (i.e. john@example.com, jane@example.com)

**Importance:** sets the importance of the email being sent. Can be set to Low, Normal, or High

**Sensitivity:** sets the sensitivity of the email being sent. Can be set to Normal, Personal, Private, or Confidential

#### Content

**Subject:** subject line of the email being sent

**Message:** message to be sent with the email. The message will be sent as plain text in the body of the email.

### Rename the Original File

Use this section to set how the file name of the file that had an error is handled before being saved to a new location.

**Note:** *If you do not set a location for the original file it will be deleted once processing has been completed.*

## Renaming Options

**If Present Remove:** the text you wish to be removed from the file name if present

**And Replace With:** the text you wish to replace the text removed above with

**Add a Prefix:** the text you wish to add to the beginning of the file name

**Add a Suffix:** the text you wish to add to the end of the file name

## Tracking Options

**Append date and time stamp:** You can add a date a timestamp to the file name as well. This will be added to the very end of the file name based on the options set above.

- **\_YYMMDD\_HHMMSS:** appends a 2 digit year, 2 digit month, 2 digit day, hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_160304\_140539")
- **\_YYMMDD:** appends a 2 digit year, 2 digit month, & 2 digit day (i.e. Mar 4th, 2016 02:05:39 = "\_160304")
- **\_HHMMSS:** appends the hour (in 24 hour format), minutes, & seconds (i.e. Mar 4th, 2016 02:05:39 = "\_140539")

## Save the Original File

Use this section to save the file that had an error to a local directory on the server.

### Location

**Folder Path:** the full path to a local directory (on the server) to watch for files.

**Note:** *This directory is local to where the server is running not the PAS Manager and so the file path must follow the format set by the OS of the server.*

## Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)

- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name

## Post the Original File using FTP

Use this section to send the file that had an error a directory on an FTP server.

### Destination

**Server:** the host name of the FTP server, such as *ftp.example.com*

**Folder:** the directory on the FTP server to watch for files

**User:** the user name to access the server

**Password:** the password for the user set above

### Name Collision Logic

When a prepared output file has the same name as an existing file the existing file could be overwritten. You may choose to have a unique name created by appending a numeric or alphabetic counter to the end of the file name. Be careful when using the overwrite option.

- **Add a Unique Numeric Suffix:** appends a unique number to the end of the file that will increment by 1 for each occurrence (i.e. \_1, \_2, etc...)
- **Add a Unique Alphabetic Suffix:** appends a unique letter to the end of the file for each occurrence (i.e. \_A, \_B, etc...)
- **Overwrite the Previous File:** Overwrites the existing file in the original storage location that contains the exact same name



## Supported File Types

PDF Automation Server supports converting certain non-PDF file types into PDF Documents. The current supported types are:

- Image Files: \*.png, \*.jpg, \*.jpeg, \*.jpe, \*.gif, \*.tif & \*.tiff.
- Word Files: \*.doc and \*.docx
- Text Files: \*.txt



# Glossary

## A

**Annotation:** a note of explanation or comment added to a text or diagram.

## B

**B&W:** stands for black and white

**Bookmark:** a type of link with representative text in the navigation panel. Each bookmark in the navigation panel goes to a different view or page in the document.

## C

**Comments:** notes associated with Annotations and Markups that communicate ideas or provide feedback.

## D

**Digital ID:** an electronic form of identification used when signing documents that proves your identity. A digital ID usually contains your name and email address, the name of the organization that issued it, a serial number, and an expiration date. Digital IDs are used for certificate security and digital signatures.

## E

**Embedded Font:** contains the entire font stored within the PDF document.

**Embedded Subset Font:** contains portions of the font stored within the PDF. This means that not every character available in the font will be available.

## F

**FDF:** a text file format used by Adobe Acrobat. FDF files are used for text files exported from .PDF files. FDF files are smaller than .PDF files because they only contain the form field data, and not the entire form.

## G

**GIF:** a lossless format for image files that supports both animated and static images.

## H

**HTML5:** a W3C specification that defines the fifth major revision of the Hypertext Markup Language (HTML). One of the major changes in HTML5 is in respect to how HTML addresses Web applications. Other new features in HTML5 include specific functions for embedding graphics, audio, video, and interactive documents.

**Hyperlink:** a link from a hypertext file or document to another location or file, typically activated by clicking on a highlighted word or image on the screen.

## J

**JavaScript:** an object-oriented computer programming language commonly used to create interactive effects within web browsers.

**JPEG:** JPEG (usually pronounced JAY-pehg) is any graphic image file produced by using a JPEG standard.

## L

**Lossless Compression:** a class of data compression algorithms that allows the original data to be perfectly reconstructed from the compressed data.

**Lossy Compression:** a class of data encoding methods that uses inexact approximations (or partial data discarding) to represent the content. These techniques are used to reduce data size for storage, handling, and transmitting content.

## M

**Metadata:** a set of data that describes and gives information about other data within the PDF.

## O

**OCR:** Optical Character Recognition (OCR) is the mechanical or electronic conversion of images of typed or printed text into machine-encoded searchable text data.

## P

**PDF:** Portable Document Format (PDF) is a file format that provides an electronic image of text and/or graphics that looks like a printed document and can be viewed, printed, and electronically transmitted.

**PNG:** a raster graphics file format that supports lossless data compression.

## R

**Redaction:** a form of editing in which confidential information such as texts or images are removed (redacted) to prepare a document for final publication.

**REST:** Representational State Transfer (REST) is an architectural style that defines a set of constraints to be used for creating web services. Web services that conform to the REST architectural style, or RESTful web services, provide interoperability between computer systems on the Internet.

## T

**TIFF:** a common format for exchanging raster graphics (bitmap) images between application programs, including those used for scanner images. A TIFF file can be identified as a file with a ".tiff" or ".tif" file name suffix.

## X

**XFDF:** an XML-based file format for representing form data and annotations that are contained in a PDF form. XFDF helps keep your data secure. Therefore when opening an XFDF file in Adobe Reader, you may need to trust the site transferring the data.

**XML:** Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding documents in a format which is both human-readable and machine-readable.