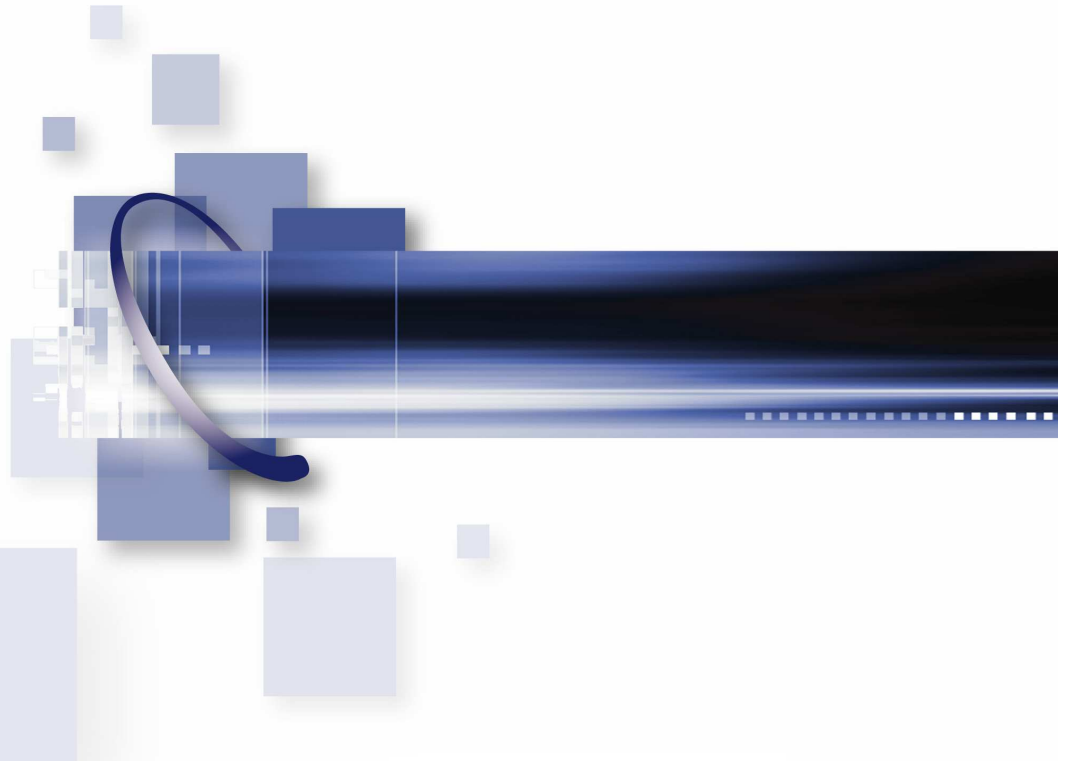




AutoDoc

taking care of your business



Reference Guide

Installation

Configuration

Processes

Troubleshooting

AutoDoc

Reference Guide

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Version 3.156

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Introduction

This chapter introduces what AutoDoc does and how it does it, as well as some guidelines on using this Reference Guide.

This chapter contains the following sections:

- AutoDoc in a Nutshell
- Using this Reference Guide

AutoDoc in a Nutshell

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

AutoDoc behaves as a printer driver which, upon receiving instruction to print a document, interprets that document's content to establish what delivery method(s) and associated options should be applied, and performs the delivery accordingly.

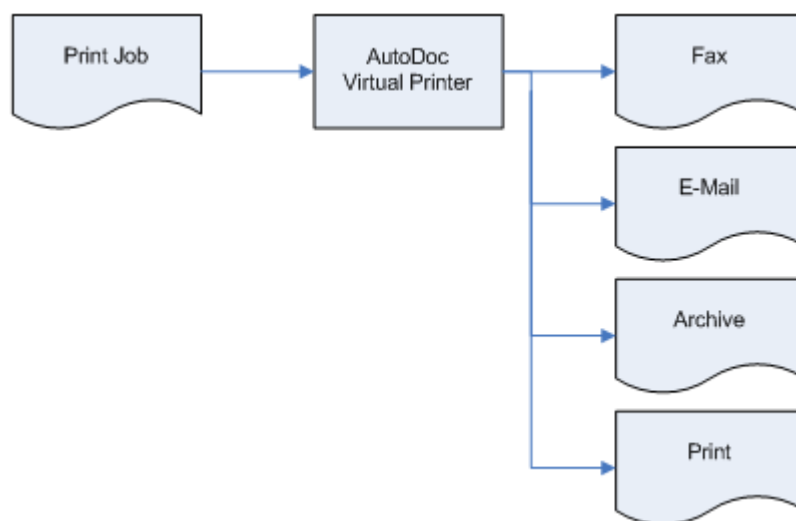


FIGURE 1 - depicting the translation of a print job, via the AutoDoc virtual printer, into delivered documents.

The document content which triggers a response from AutoDoc is effectively 'encoded' using a simple method which can be hidden from the user - the font colour of text in the document. For example, AutoDoc can be configured to treat any text with a white font colour (which is invisible to the user on a white background), and also any text with a 'not-quite-black' font colour (which still appears as normal black text to the human eye), as content to which it must respond. The section on Font Colour in Chapter 3 provides more information on how colour is used.

The chief advantages of the AutoDoc system are:

- The end user can be completely oblivious to how the system works. If a user knows how to print a document, that user can successfully use AutoDoc.
- Availability of a large number of extensively configurable delivery option combinations (99).

- Simplicity of installation (especially in a network environment) and configuration.
- Wide spectrum of compatibility - any software application that allows text colour to be edited, and can print to a printer, can use the AutoDoc system. This includes word processors, databases, and spreadsheet and accounting applications.

AutoDoc is available in 'Personal' and 'Server' editions.

Using this Reference Guide

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

I C O N K E Y	
	Critical information
	Important information
	Tip/useful information
	Key concept
	Process to carry out

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

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

Conventions

The following conventions apply in this guide:

- Filenames and file paths, drive letters, or text visible in on-screen fields appear in the same font as used in the following example: `C:\Program files\AutoDoc`.
- Any element of a text string that is not fixed is denoted with '<>', as in the following example: `C:\Documents and Settings\<folder name>\<filename>`.
- When referring to an on-screen control such as a button or text field, the name of the control appears in italics, as in the following example: Click the *Next* button to continue.
- Due to AutoDoc being a Windows®-based application, frequent reference to Microsoft® and its products is made in this guide (including Microsoft® Fax, Outlook®, Word®, Excel®, and various Windows® operating platforms). It is acknowledged that the Microsoft name and the names of its products are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.
- Due to AutoDoc's compatibility with Symantec® WinFax®, frequent reference is made to this product. It is acknowledged that Symantec and WinFax are either registered trademarks or trademarks of Symantec Corporation in the United States and/or other countries.

Installation

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

This chapter contains the following sections:

- Before You Start
- Installing AutoDoc
- Initial Configuration

Before You Start

System Requirements

The following requirements apply to the AutoDoc system:

- One of Windows NT4 Workstation, Windows 2000 Professional, Windows 2000 Server, Windows 2003 Server, Windows XP Professional or Windows XP Home operating systems.
- If fax functionality is required, Microsoft Fax or Symantec WinFax Pro (version 9 or greater) must be installed, configured and running on the local machine (for AutoDoc Personal Edition) or Server (AutoDoc Server Edition) **before** installing AutoDoc. For more information on installing a fax service, see the Installing a Fax Service section below. An external phone line is also required for sending faxes.



Note that there may be compatibility issues between versions of WinFax Pro and Windows. For example, while AutoDoc requires version 9 or greater of WinFax Pro (if WinFax is your preference), only WinFax Pro version 10.02 or greater is compatible with Windows XP. Also, WinFax Pro is not compatible with server editions of Windows.

- If e-mail functionality is required, outgoing SMTP mail server settings will be needed for post-installation configuration. AutoDoc has a built in e-mail client, but requires access to your nominated SMTP server (for example, AutoDoc will not prompt you to open an Internet connection if it cannot access an external SMTP server - it needs to be open in advance).
- A minimum of 8 MB of free hard drive space.

Single Installation

AutoDoc is available in 'Personal' and 'Server' editions, but regardless of your edition, it should only be installed once.



Note that even if you are installing a Server edition for multi-user use, the AutoDoc application requires a **single** installation only (in this case, on the server). AutoDoc Server edition should **not** be installed on individual workstations. Under the Server edition of AutoDoc, the application is installed to the server, and a virtual printer is created on the server which can then be shared as a network printer. Client machines which require the AutoDoc functionality only need to have this network printer installed via the standard Windows 'Add Printer' functionality.

Installing a Fax Service

AutoDoc supports both Microsoft Fax (which is a standard Windows component) and Symantec WinFax Pro.

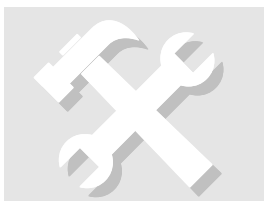
For instructions on enabling Microsoft Fax, please consult the appropriate Microsoft knowledgebase article from the Microsoft website:

<http://support.microsoft.com/>

For details pertaining to the installation of Symantec WinFax Pro, please see the Symantec support knowledgebase for WinFax:

<http://www.symantec.com/techsupp/winfax/>

Installing AutoDoc



AutoDoc is available for installation from two sources:

- An installation CD
- A downloadable file available from the ID Data website, <http://www.iddata.nl/>

Running from CD

Perform the following steps to run the installation from CD:

1. Insert the CD into your CD/DVD drive.
2. The installation program should run automatically, in which case you should now move to the instructions in the Configuring the AutoDoc Setup Wizard section below. If your 'auto run' setting is disabled, you will need to perform step 3 to start the installation manually.
3. Browse to your CD/DVD drive (usually designated as D:\ within Windows-based applications) and launch the file `setup.exe`.

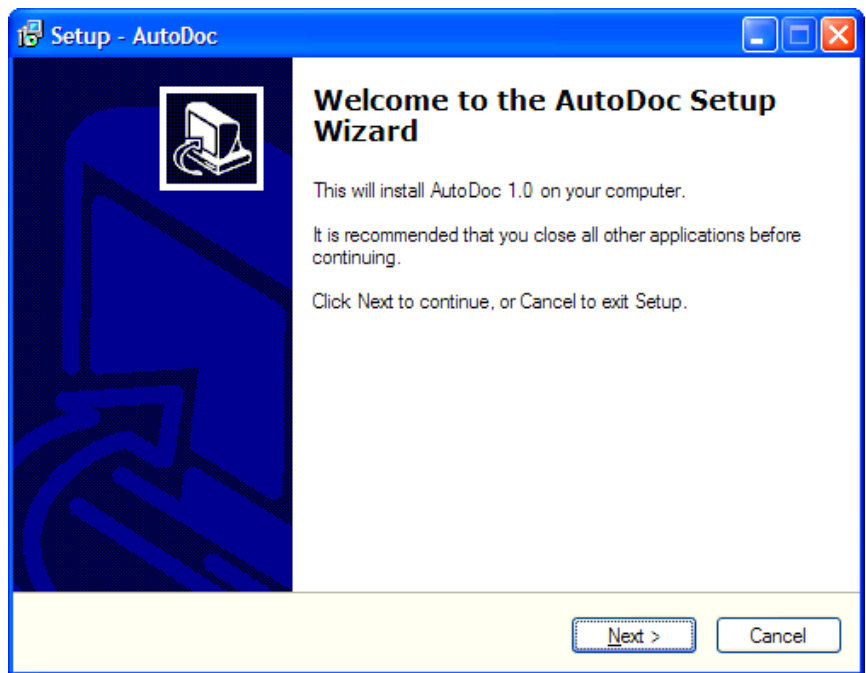
Running from a Downloaded File

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

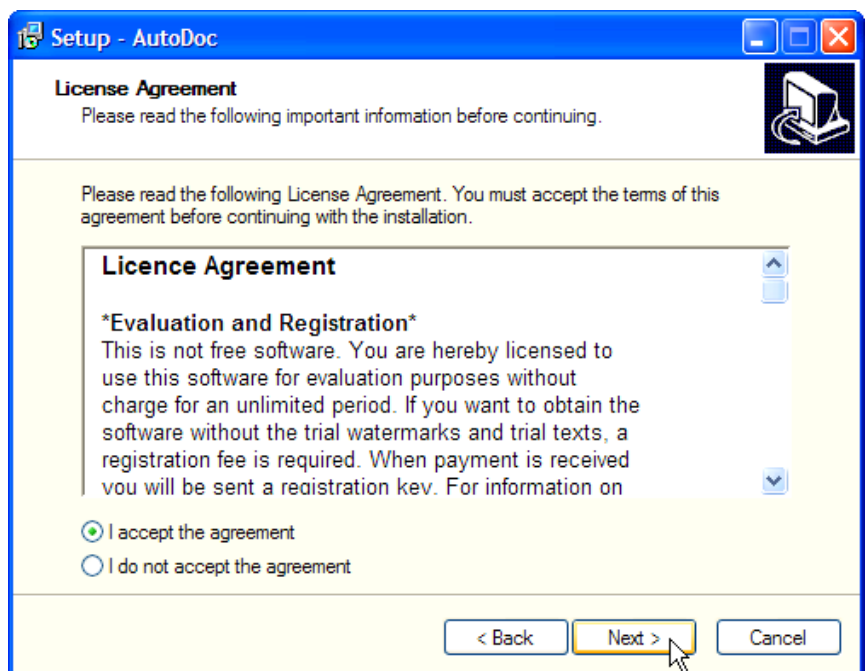
1. Browse to the location to which the self-extracting `autodoc.zip` file was downloaded.
2. Double-click on the file to launch the installation.

Configuring the AutoDoc Setup Wizard

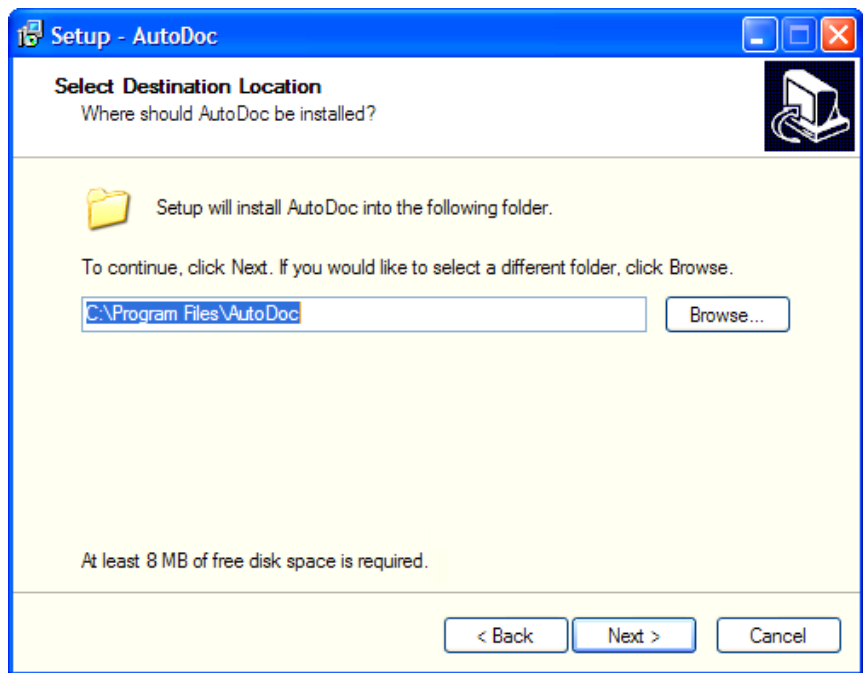
When you run the installation program, the AutoDoc Setup Wizard is launched:



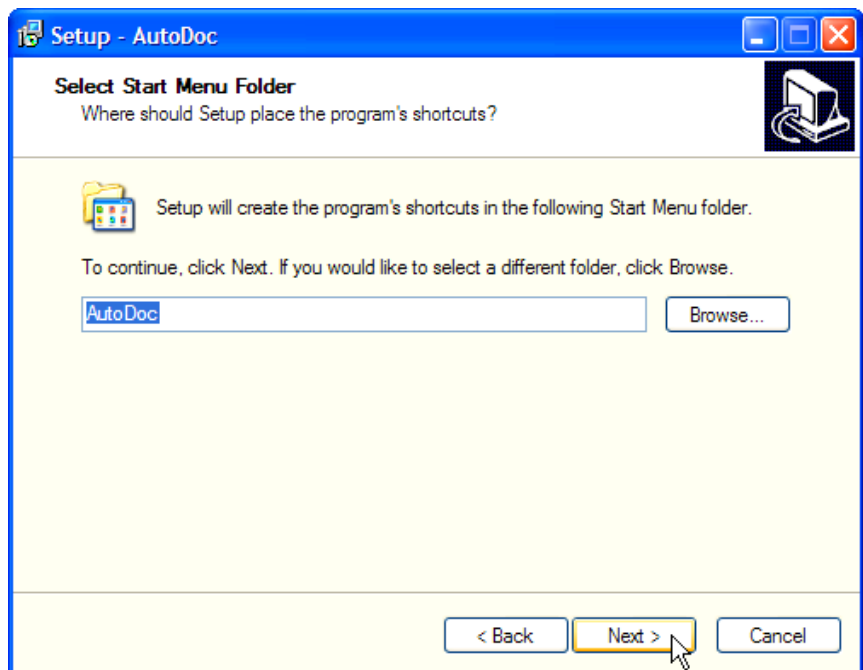
1. Click the *Next* button to continue.
2. If you wish to proceed with the installation, read and accept the licence agreement, and click the *Next* button:



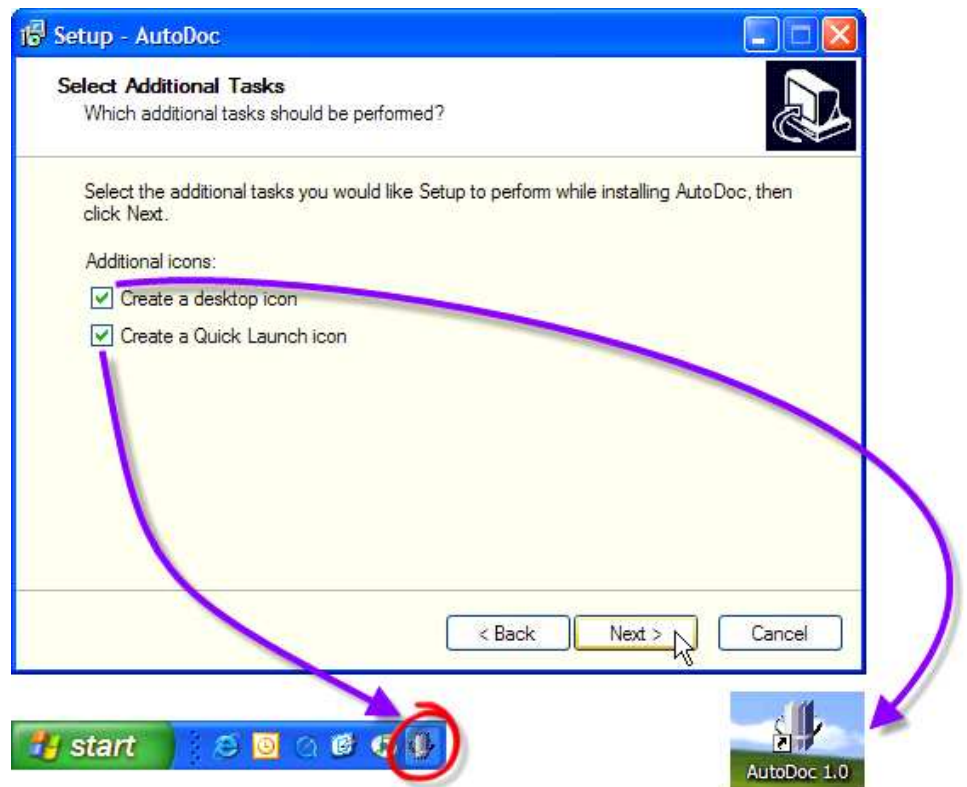
3. Select the location in which you want AutoDoc to be installed (it is recommended that you accept the default location), then click the *Next* button:



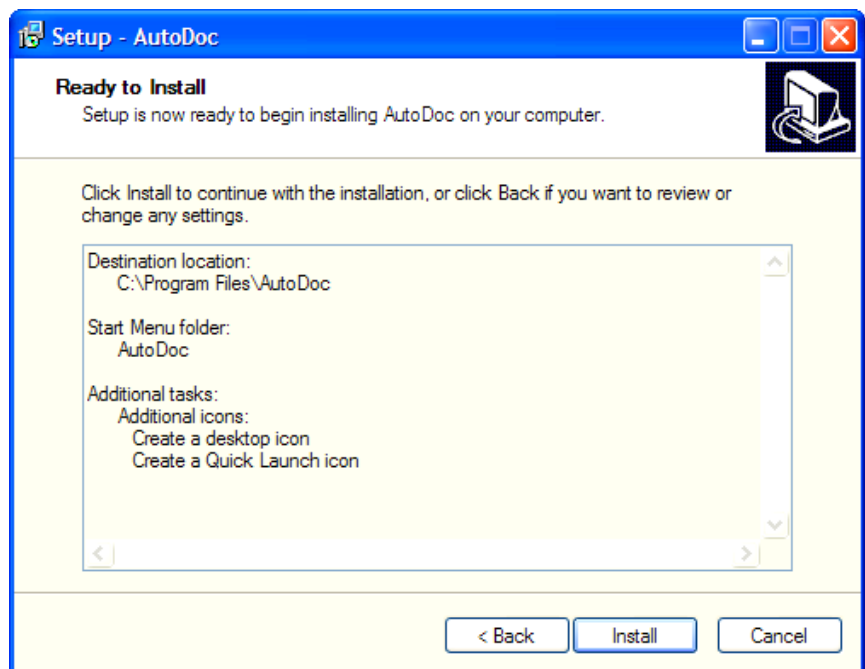
4. Select the Start Menu folder in which you want the AutoDoc program's icons to be installed (it is recommended that you accept the default location), then click the *Next* button:



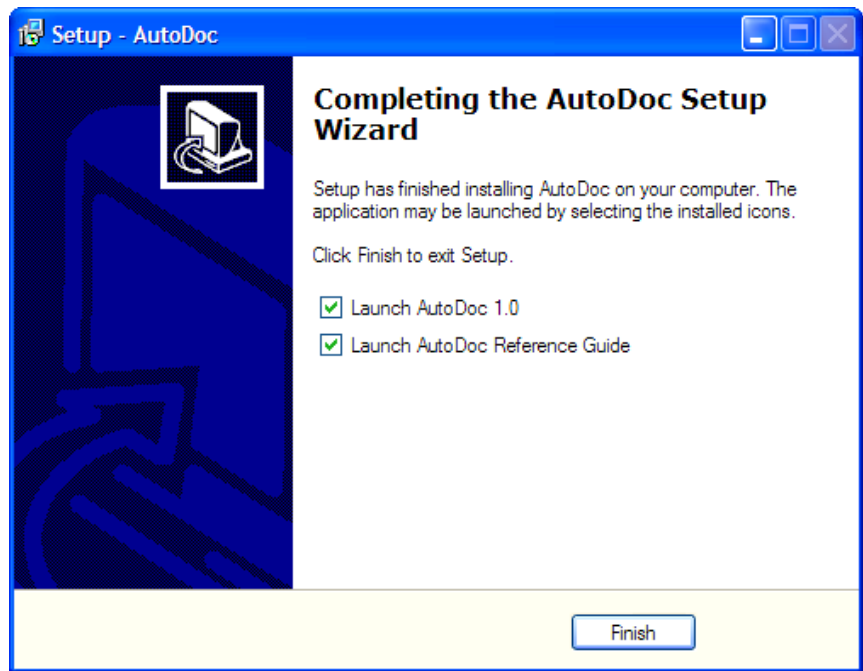
5. Use the checkboxes to specify whether the Wizard should create a desktop icon and/or a Quick Launch icon, then click the *Next* button:



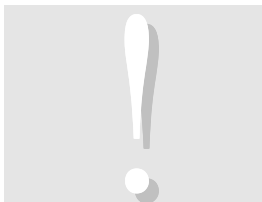
6. Confirm all installation options, and either click the *Install* button to begin the installation, or click *<Back* to go to previous screens to change options:



7. You will be presented with progress information as the installation runs. When the installation has finished, the following screen appears:



8. Click the *Finish* button to launch the installed AutoDoc application, or alternatively clear the *Launch AutoDoc 1.0*, and/or *Launch AutoDoc Reference Guide* checkboxes before finishing, to prevent the application and/or guide being opened immediately.



When the AutoDoc application is first launched, you will receive a prompt stating that the AutoDoc virtual printer driver has not yet been installed (see Figure 2). This refers to the virtual printer driver to which print jobs need to be directed in order for them to be handled by the AutoDoc system. At this point you can click *OK* and navigate around AutoDoc, but we recommend you read the AutoDoc Concepts - How It Works chapter (starting on page 20) before performing the following steps to install the AutoDoc virtual printer driver(s). However, be aware that while installing an AutoDoc virtual printer without reading the AutoDoc Concepts - How It Works chapter will involve making an uninformed decision, even if you discover later that you have made the wrong decision for your situation, it is an easy process to reinstall the virtual printer.

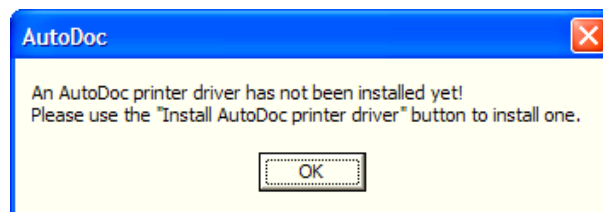


FIGURE 2 - The prompt that occurs when the AutoDoc application is opened the first time, prior to installing an AutoDoc printer driver.

Initial Configuration



Note that if you have installed a Personal Edition of AutoDoc, you will not be able to print successfully to an AutoDoc shared printer, nor will you be able to change the sharing settings of the AutoDoc printer once it has been installed. So, **before** installing the AutoDoc printer, you must ensure that the sharing properties of the printer which you want to replicate are set to 'do not share'. If the replicated printers are set to be shared, the AutoDoc copies of these printers will be locked to this setting, which will result in print jobs not being processed by the Personal Edition.



To install the AutoDoc printer driver(s), perform the following steps:

1. If you will be replicating a monochrome printer and using applications that don't send colour information to monochrome printers (see page 29 for a discussion of this issue), decide whether to use a substitute colour printer, and if so, enter the colour printer's name in the *Default colour driver to use for monochrome printers* field (or accept the default). Note that the name entered must match the name Windows uses for the printer (check the Add Printers list if you are unsure).



FIGURE 3 - The *Default colour printer driver to use for monochrome printers* field has a default entry. See the note below regarding potential issues when using this field.



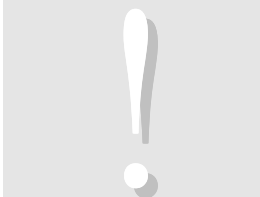
Note that if you are using a monochrome printer but are **not** using applications which do not pass colour information to monochrome printers, you should delete the default entry from this field to ensure that the exact settings of your printer driver are replicated, rather than those of the default HP Color Laserjet 4500.

2. The Installation | Printer Driver Setup tab contains a list of all the installed printers that AutoDoc has detected. Each printer name is prefixed with 'AutoDoc', since you have the option of installing an AutoDoc 'copy' of each printer. Use the checkboxes to select the printers for which you would like to install an AutoDoc copy:

1. AutoDoc printers to be installed

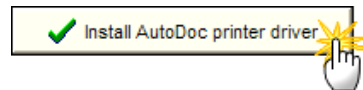
Select the printer(s) for which you want an AutoDoc printer to be (re)installed. The printer to be copied is used as a template for the AutoDoc printer for paper size, margins, DPI etc.....

- ☐ AutoDoc HP LaserJet 4
- ☐ AutoDoc HP DeskJet 540 (Monochrome)
- ☒ AutoDoc HP DeskJet 540
- ☐ AutoDoc EPSON Stylus C65 Series



Note that installing multiple monochrome printers in the same installation procedure will result in any specified substitute colour printer being applied to *all* monochrome printers selected for installation. If you require monochrome printers to be installed with different substitutes, simply complete a separate installation for each printer (using the *(Re)Install AutoDoc Printers* button for subsequent printers, electing NOT to delete existing AutoDoc printers when prompted).

3. When you have selected all the printers for which you would like to create an AutoDoc copy, click the *Install AutoDoc printer driver* button:



4. When prompted to confirm the installation, click on *OK*. Several actions will be reported in AutoDoc's status bar at the lower left corner of the application's window while AutoDoc negotiates with your fax/print spooling service (see Figure 4). You will be prompted to delete any existing AutoDoc printers first (choosing *Yes* or *No* will have the same effect in this case as no AutoDoc printers exist yet).

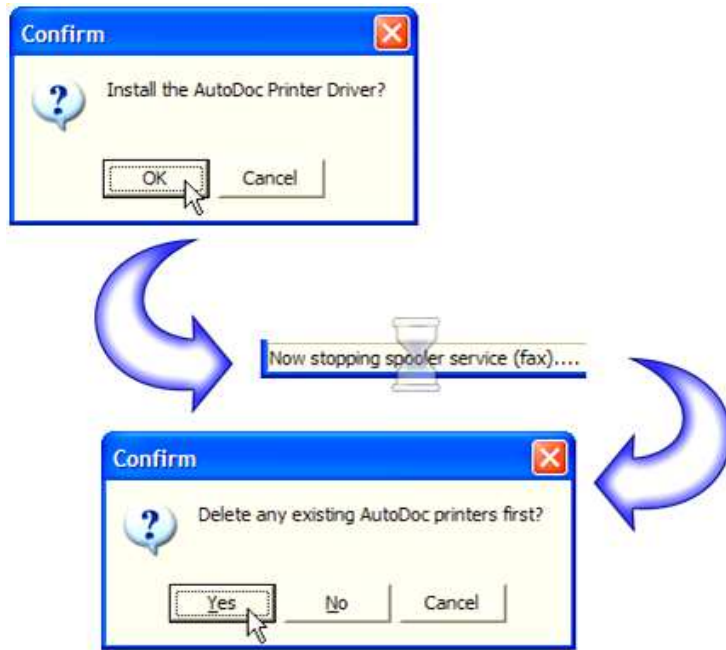
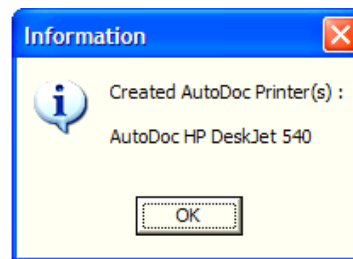


Figure 4 - The prompts and status bar messages that occur during the process of installing AutoDoc printers. There may be some delay while AutoDoc stops and restarts spooler services.

5. When you have responded to the prompts, you will be advised which existing drivers were replicated as AutoDoc drivers:



6. If you have installed the Server edition of AutoDoc, you will now need to ensure that the AutoDoc printer(s) are shared (to check/change this setting, look at the printer's 'properties' menu), and also install these new AutoDoc **network** printer(s) on client machines which will be using AutoDoc, using the standard Windows 'Add Printer' functionality.
7. Remember that the AutoDoc printers replicate the settings of the real printers you elect to copy. This means that if your real printers were offline at the time they were replicated, your AutoDoc printers will also be offline, and will need to be set to online before they can be used.
8. The AutoDoc printer can be set as the default printer for a user if this suits a particular need. Doing so makes document delivery literally the push of a button away in many applications - via the *Print* button. However, this also introduces the risk that documents may be unintentionally sent to this multi-output package. We recommend that you familiarise yourself with the application before making the decision

to set AutoDoc as the default printer (please also see the Default Form section on page 34 of Chapter 4, Configuration).

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

AutoDoc Concepts - How It Works

The AutoDoc system is based on a number of entities which combine to produce a flexible and easy to use system. This chapter introduces these components as a necessary precursor to configuring your AutoDoc application, and details how AutoDoc translates their relationships into effective document delivery.

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

- Delivery Methods
- Font Colour
- Textual Commands
- Translations
- Variables
- Forms
- AutoDoc Printers

The following sections introduce each of these concepts, and the final section, Putting It All Together, summarises the working relationship between them.

Overview

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

If you are not familiar with the concept of ‘metadata’, this chapter will introduce you to the AutoDoc version!

Delivery Methods

The term ‘delivery methods’ refers to the output of an AutoDoc print job. The following four delivery methods are supported by AutoDoc:

- Print - the job printed to AutoDoc is printed to hard copy.
- Archive (file storage) - the job printed to AutoDoc is converted to PDF format and saved in a user-defined location. The Archive function can also be configured to invoke a third-party application, should your organisation already have a document management system in place.
- Fax - the job printed to AutoDoc is converted to TIF format and queued to the specified fax service.
- E-mail - the job printed to AutoDoc is converted to PDF and included as an attachment on an e-mail to the specified address.

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

Font Colour

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

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

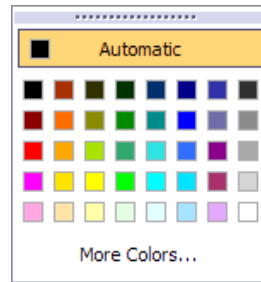


FIGURE 5 - The Windows palette

The Windows ‘palette’ (Figure 5) is a familiar feature to any user who utilises different font colours. This standard palette is actually accessing some preset combinations of ‘RGB’ (Red/Green/Blue) ‘mixture’ settings for the colour in question. For example, the white colour in the palette is actually defined as a mixture of 255 (the maximum) for each of Red, Green, and Blue. These settings can be viewed in the Custom palette dialogue (see Figure 6), which is usually accessible via the *More Colors...* option in a Windows-based application palette.

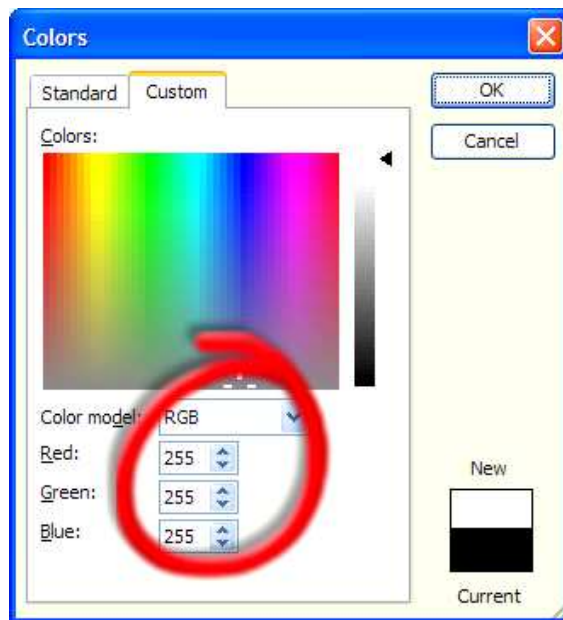


FIGURE 6 - A Microsoft application's custom palette, showing the ‘RGB’ numeric settings. In this case, all colour values are at their maximum (255), which, mimicking the natural light spectrum, produces white.

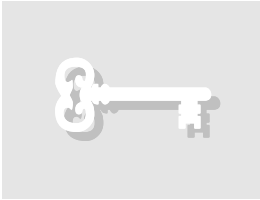
By default, AutoDoc treats text with any of the following RGB settings as information carrying special meaning to AutoDoc, rather than information that must only be printed:

- 255, 255, 255 (that is, white). Such text is treated as an AutoDoc textual command (textual commands are explained in more detail later in this chapter).
- 1, 1, 1 then 2, 2, 2... through to 20, 20, 20 (that is, ‘not quite black’ - black is 0, 0, 0). These combinations are so close to black that they

appear as black in a printed document. Such text is processed as an AutoDoc user-defined variable (user-defined variables are explained in more detail later in this chapter).

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

Textual Commands



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

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

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

Six command types can be added to a document. Three of these directly determine the delivery method that will be employed:

- Form number, which specifies the AutoDoc form to be applied to the document (forms are explained in more detail later in this chapter)
- Recipient e-mail address, which instructs AutoDoc to send the page in question to the e-mail address specified.
- Recipient fax number, which instructs AutoDoc to send the page in question to the fax number specified.

The remaining three command types affect content and timing of delivery:

- Fax scheduled time, which instructs AutoDoc to send the fax job at a specific date and time.
- File path and name, which instructs AutoDoc to include the specified file as an attachment to e-mailed deliveries.
- Language, which instructs AutoDoc to send faxes and e-mails in a specific language. This function allows 'sub-forms' to be created within forms. For example, form 1 may have two 'sub-forms' - form 1 in English, and form 1 in French.

Note that textual commands can be added to a document automatically by an application, based on information available to that application. For example, accounting applications can create an invoice including the debtor's e-mail address in white text, thus eliminating the need for the end user to be aware of

the mechanisms by which AutoDoc functions - the user only needs to 'print' the invoice, and it will be sent to the debtor's e-mail address.

More detailed information about how AutoDoc finds and processes textual commands can be found in the Chapter devoted to Document Content Configuration, which starts at page 97.

Translations



The previous Textual Commands section explains how adding certain text to a document instructs AutoDoc how to deliver the page in question.

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

This flexibility is achieved through translations. AutoDoc's 'translation' functionality should not be confused with another useful AutoDoc feature - language support. Language support allows you to send e-mails and faxes in different languages, while translations allow you to 'map' existing text to an AutoDoc command.

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

Translations allow for pre-existing text to represent each of the six command types: e-mail address; fax number; form number; fax scheduling; file attachment, and language. The same 'string' of text can be configured to represent one, some, or all of these commands.

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

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

The use of 'wildcards' is also catered for with translations. Please see page 56 for more details on using wildcards.

Variables



AutoDoc variables are blocks of information which may change from document to document, and can be used as data to be included in the delivery of documents. AutoDoc supports 23 pre-defined variables for 'system' type information, and another 20 user-defined variables.

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

Pre-defined System Variables

System variables include such information as username, print date, and sender's e-mail address. These variables are used primarily to include relevant information in the delivered documents. For example, AutoDoc could construct a fax cover page that includes the sender's e-mail address (%emailaddress%) and other pertinent information.

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

The following system variables are available within AutoDoc:

- %archiveroot% - used to store a directory path which is used as the root directory for the archiving function.
- %yyyy% - four-digit year stamp of system date - for example, '2005'.
- %yy% - two-digit year stamp of system date - for example, '05'.
- %mmmm% - full name of month of system date - for example, 'April'.
- %mm% - two-digit month stamp of system date - for example, '04'.
- %dd% - two-digit day stamp of system date - for example, '28'.
- %hh% - two-digit hour stamp of system date, in 24-hour format - for example, '18' for 6 p.m.
- %nn% - two-digit minute stamp of system date - for example, '30'.
- %ss% - two-digit second stamp of system date - for example, '59'.
- %date% - date stamp of system date in dd mmmm yyyy format - for example, '28 April 2005'.
- %usdate% - date stamp of system date in mmmm dd yyyy format - for example, 'April 28 2005'.
- %username% - the username associated with the print job.
- %fullname% - the full name of the user who created the print job.
- %company% - the company of the user who created the print job.
- %department% - the department of the user who created the print job.

- %officelocation% - the office location of the user who created the print job.
- %title% - the title of the user who created the print job.
- %emailaddress% - the e-mail address of the user who created the print job.
- %faxnumber% - the fax number of the user who created the print job.
- %officephone% - the office phone number of the user who created the print job.
- %homephone% - the home phone number of the user who created the print job.
- %remarks% - the remarks associated with the user who created the print job.
- %address% - the address of the user who created the print job.

User-defined Variables

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

User-defined Variables can be understood as being similar to translated text. They are usually based on pre-existing text strings (rather than text added specifically for the sake of AutoDoc), and are defined as being of a certain colour. However, in contrast to translations, user-defined variables do not instruct AutoDoc to do anything, other than to store them for later use (for example, to construct an e-mail subject heading), and a user-defined variable is defined *only* by its colour.

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

By default, user-defined variables are known simply as 'Variable 1', 'Variable 2', and so on. This means that by default, the syntax by which they are recognised, is %variable 1%, %variable 2%, and so on. The default variable names also represent the default RGB settings for each. For example, variable 1 has an RGB setting of 1,1,1, variable 2 is 2,2,2, and so on. The 20 variables therefore appear by default in 20 shades which are not strictly black, but which appear as black to the human eye (as an example, this sentence has an RGB value of 20,20,20, the 'least black' of the default 'not quite black' settings recognised by AutoDoc).

Note that AutoDoc does have some pre-configured forms for typical document types, in which the variables have been pre-named as something other than the default 'Variable 1', 'Variable 2', and so on.

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

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

AutoDoc also provides the functionality to use 'global names' for variables, and allows you to use only part of a variable's text if only part is required. These features are described in detail on page 63, in the Variables configuration section.

Forms



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

AutoDoc stores up to 99 different form configurations.

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

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

- Forms only apply to a document that has been 'printed' to the AutoDoc printer. That is, forms have no bearing on the content or format of the source document, but rather define how that source document will be presented via any of the AutoDoc delivery methods.
- Because forms define how a source document is delivered rather than created, it is possible that a form will apply to multiple documents of disparate types. For example, Invoices and Letters of Employment could be routed via the same AutoDoc form, if a very generic form configuration was used.

Pre-defined and user-defined variables can be used extensively in configuring form options. For example, the system variables for date and username could be used to construct, dynamically, a file path to which archive copies of documents

are saved, or a user-defined variable could be used to construct a subject heading for an e-mail or fax.

For example, you may decide to use form 2 specifically for outgoing invoices for your company 'XYZ Electrical Co.'. If the invoice document has the chargeable total (\$3225) printed in text with RGB = 6,6,6, and the number '2' printed in white text (RGB = 255, 255, 255), you could configure form 2's e-mail subject heading as follows:

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

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

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

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

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

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

...which would achieve the same result.

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

AutoDoc Printers



AutoDoc printers are an important part of the AutoDoc system, and while you can more or less forget about them once they are set up and working, there are some important concepts to become familiar with to enable the correct setup to be achieved.

In order for AutoDoc to handle your print jobs, an AutoDoc printer (or multiple AutoDoc printers) need(s) to be installed. The 'Print' menu of existing applications will then allow the choice of an AutoDoc printer as the printer of choice. The Initial Configuration section on page 16 provides step-by-step instructions on installing AutoDoc printers.

As part of the process of installing a virtual printer driver, AutoDoc gives you the option of creating an AutoDoc printer driver 'copy' of *each* of the existing printer drivers available to the machine on which AutoDoc is installed. Note that only one AutoDoc printer driver is required for AutoDoc to work correctly, but AutoDoc gives the option of installing a virtual driver for each of your existing

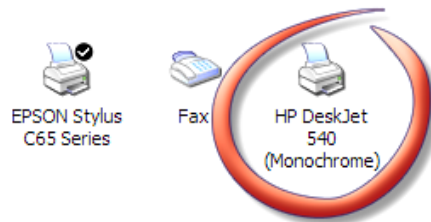
drivers so that any printer-specific settings can be replicated in the AutoDoc virtual printer.

For example, AutoDoc copies a printer's 'DPI' settings to ensure that a letterhead is correctly reproduced with respect to margins. You may also have a multi-tray printer, or perhaps a printer with different paper-size settings, and you may want to retain these settings if AutoDoc is required to print to such a printer. In this case, it is recommended that you choose to create a separate virtual printer for each of the existing printers whose settings you wish to preserve within the AutoDoc environment.



Note that different third-party applications can send different information to monochrome printers, and this has important implications for AutoDoc's functionality. Some applications, when sending a print job to a printer, query the printer's colour printing capabilities, and if the printer is monochrome, will modify the print job so that no colour information is included. Any colour information (for example, 'red' = RGB 255,0,0) is converted to black or white (0,0,0 or 255,255,255). Since AutoDoc uses RGB values to identify textual commands, user-defined variables and translations, these AutoDoc features may be rendered non-functional when printing from such an application. Please see page 104 for Notes on Third-Party Application which have been identified as operating in this fashion. As described below, however, AutoDoc does cater for this situation.

To overcome this problem, AutoDoc provides functionality to use a 'substitute' colour printer driver for your monochrome printer. For example, consider the following scenario. You have a 'HP DeskJet 540 (Monochrome)' printer which you would like to replicate as an AutoDoc printer, but you intend to use AutoDoc with a third-party application that does not pass colour information to monochrome printers.



If you do not plan to use AutoDoc's user-defined variables or translations, you could simply install an AutoDoc copy of this printer and use RGB 255,255,255 (white) text for textual commands, and AutoDoc's fax/e-mail/archive functionality would continue to work as normal, though variables and colour translations would not be recognised.

If you would like to use the monochrome printer *and* use user-defined variables and translations, you can instruct AutoDoc to use the printer driver of a colour version of your monochrome printer (or a similar printer). For example, you could elect to use the 'HP DeskJet 540' (that is, a colour version of the 'HP DeskJet 540 (monochrome)') to use as the basis for the AutoDoc copy. By doing so, AutoDoc creates a copy of the colour printer, but names the printer as the monochrome printer. This effectively 'tricks' the application which is sending

the print job - when it queries your AutoDoc monochrome printer, it finds that it is colour-enabled (because it has been copied from a colour printer), and therefore sends through colour-coded text, which AutoDoc can then recognise as user-defined variables and translations. This approach also has the advantage that electronically-delivered content (such as e-mailed PDF attachments) can also feature colour, even though they have been printed to a 'monochrome' printer.

Putting It All Together

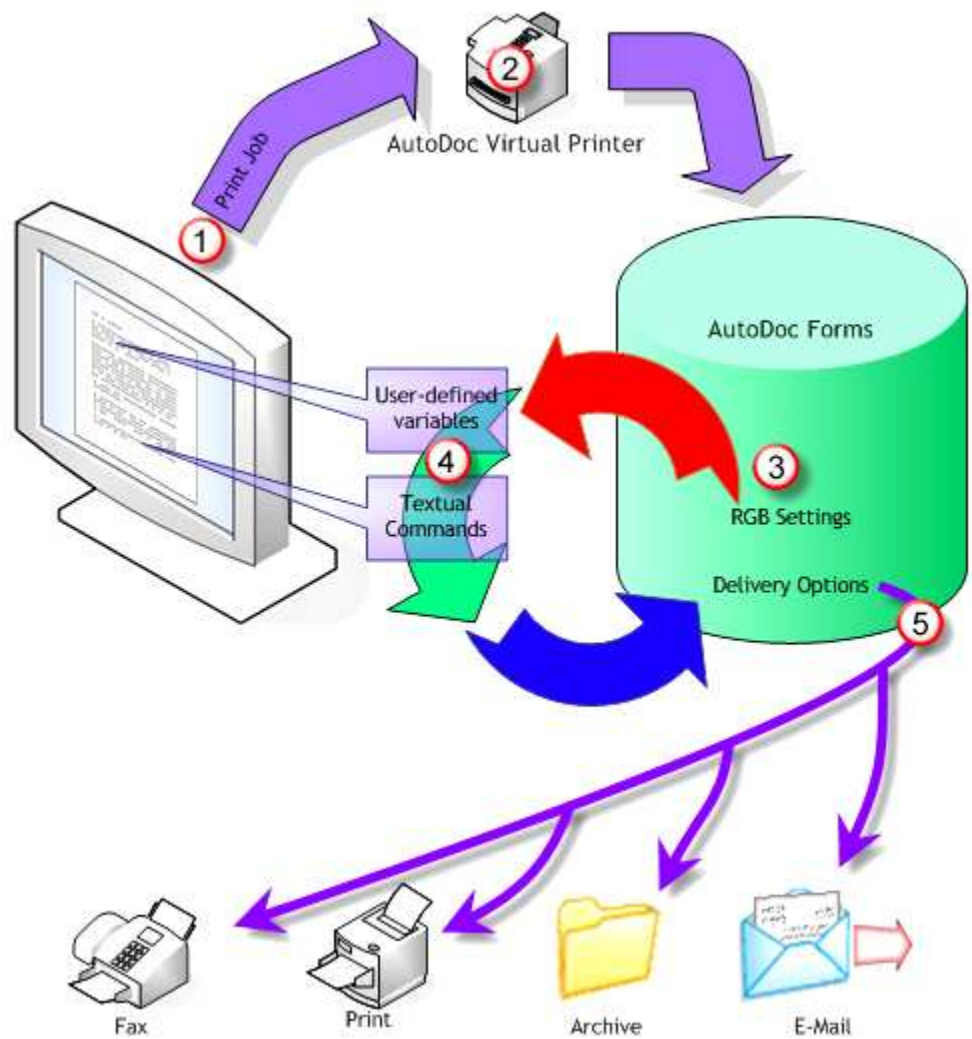


FIGURE 7 - The relationship between AutoDoc's main concepts and entities.

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

- According to the default settings, so that any text with RGB settings of 255,255,255 (=white) is recognised by AutoDoc as a textual command, and text with RGB settings of 1,1,1 (not quite black) as variable 1.
- The text 'Tax Invoice' in RGB 0,0,0 has been configured as a translation, representing the AutoDoc command '3'.
- Form 3 has variable 1 renamed as 'account name', and has an e-mail subject as follows: Invoice for %account name%.

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

- 'recipient@host.com'
- '123456'

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

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

- AutoDoc recognises the text 'Tax Invoice', and translates it as representing the AutoDoc command '3'. AutoDoc therefore registers that it must apply the pre-configured settings from form 3 to this page.
- AutoDoc creates an e-mail with the subject heading 'Invoice for ABC Automotive' (as specified in form 3), attaches a copy of the invoice, and sends it to 'recipient@host.com'.
- AutoDoc creates a fax of the invoice, for the fax number 123456, and sends it to your nominated fax service to be placed in the queue.

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

Configuration

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

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

- Overview
- Considerations
- Global Configuration
- Form Configuration

Overview

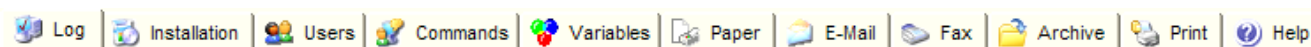


FIGURE 8 - The tab headings in AutoDoc's application console.

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

Each tab in the application view relates to a specific area of functionality or configuration. Descriptions of these tabs are grouped here based on whether they affect the whole AutoDoc system, or specific forms within that system and, as a result, the order in which the tabs appear in this guide differs slightly from the order of tabs in the software, which is as per Figure 8.

Note that many AutoDoc fields have 'tool tips' which display brief information/instructions associated with that field. To activate a tool tip, move the mouse pointer over a field and let it remain stationary for a second or two (see Figure 9).

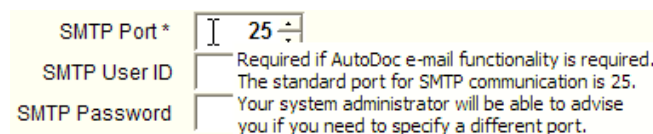


FIGURE 9 - Tool tips.

Considerations

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

Default Form



If a print job is received by the AutoDoc virtual printer, and no form number is specified in the document, form 1 is applied by default.

For example, if a document has an e-mail address textual command, but no form number, the document will be sent to that e-mail address in the format specified by form 1 (and would also be sent to any other recipients specified in form 1). Similarly, if a document has no textual commands whatsoever, but is sent to the AutoDoc printer, it will still be processed by form 1 (which may include archive and/or hard copy printing commands).

If you consider accidental printing to the AutoDoc printer to be a significant risk in your organisation, you should configure the default form with this in mind. Please also see the section on Processing Rules on page 99, for more detail on the exact rules applied to a document sent to AutoDoc for processing.

Note that the default form to be applied is user-definable, per AutoDoc printer. This setting is specified as part of the AutoDoc virtual printer's properties, and

can be seen and modified in the *Comments* field of the printer's properties dialogue (see Figure 10).

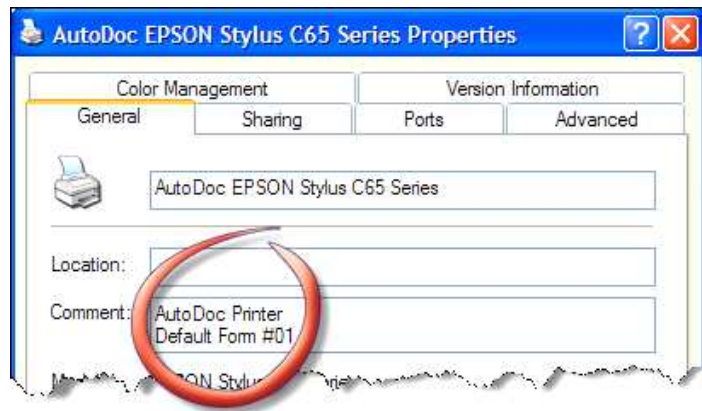


FIGURE 10 - Showing an AutoDoc virtual printer's properties dialogue. The comment includes 'Default Form #01'. If the '#01' text was changed to '#12', any print jobs sent to AutoDoc via this printer, with no form number included, would be processed by form 12.

Generic or Specific?



Because the 20 user-defined variables can apply on a per-form basis, the number of user-defined variables is potentially increased by a factor of 99 (the number of available forms).

For example, %variable 1% in form 1 may conceptually represent 'Document Type' (as in the 'Profit & Loss' report example in the User-defined Variables section on page 27), while in form 2 and its associated documents, %variable 1% may represent a very different concept, such as 'Salesrep'. Indeed, in form 1 the first user-defined variable may be renamed to %doctype%, and to %salesrep% in form 2.

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

Internal Records

AutoDoc provides several means of storing internal copies of delivered documents, each with its own advantages. These methods can be used in tandem, in isolation, or not at all, and you should be aware of the options before deciding upon which to apply within your organisation:

1. Copies of faxes and e-mails can be stored in AutoDoc's system folders. This is a global setting that applies to all faxes and e-mails created by AutoDoc. Please refer to an important discussion of the advantages and disadvantages of this option on page 119 in Chapter 7. In summary, the chief advantages are increased log and system file functionality, and an

exact reproduction of the e-mail/fax and its content, while the chief disadvantage is that multiple copies of each document are stored.

2. E-mails can be CC'd or BCC'd to an internal AutoDoc user. This results in another user (potentially the original sender) receiving an e-mail with the same format and content as that received by the original recipient. This is a form-specific setting.
3. A copy of the delivered document can be archived as a PDF. Note that this option only stores a copy of the delivered document, not the accompanying documentation such as a fax cover page or e-mail text. This is a form-specific setting, and the main advantage is that the location and filename of the document can be dynamically constructed based on document content. The inclusion/exclusion of a letterhead is also an option. The archive function also allows a third-party application to be invoked for document management purposes.
4. Printed copies of the delivered documents can be automatically produced. This option produces a hard copy of the source document itself. This is a form-specific setting. The inclusion/exclusion of a letterhead is also an option.

File Locations and References

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

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

For example, AutoDoc will easily locate the following path:

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



However, a file path which involves a mapped network drive, for example, may not be able to be accessed due the network location being unavailable, or because mappings (which can be user-specific) have changed. For such reasons, we recommend that file locations should be 'as local as possible' to AutoDoc. Where it is not possible or practical to use local paths, use full UNC (Universal Naming Convention) paths in preference to referring to mapped drive letters, ensuring the location is appropriately shared.

For example, use:

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

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

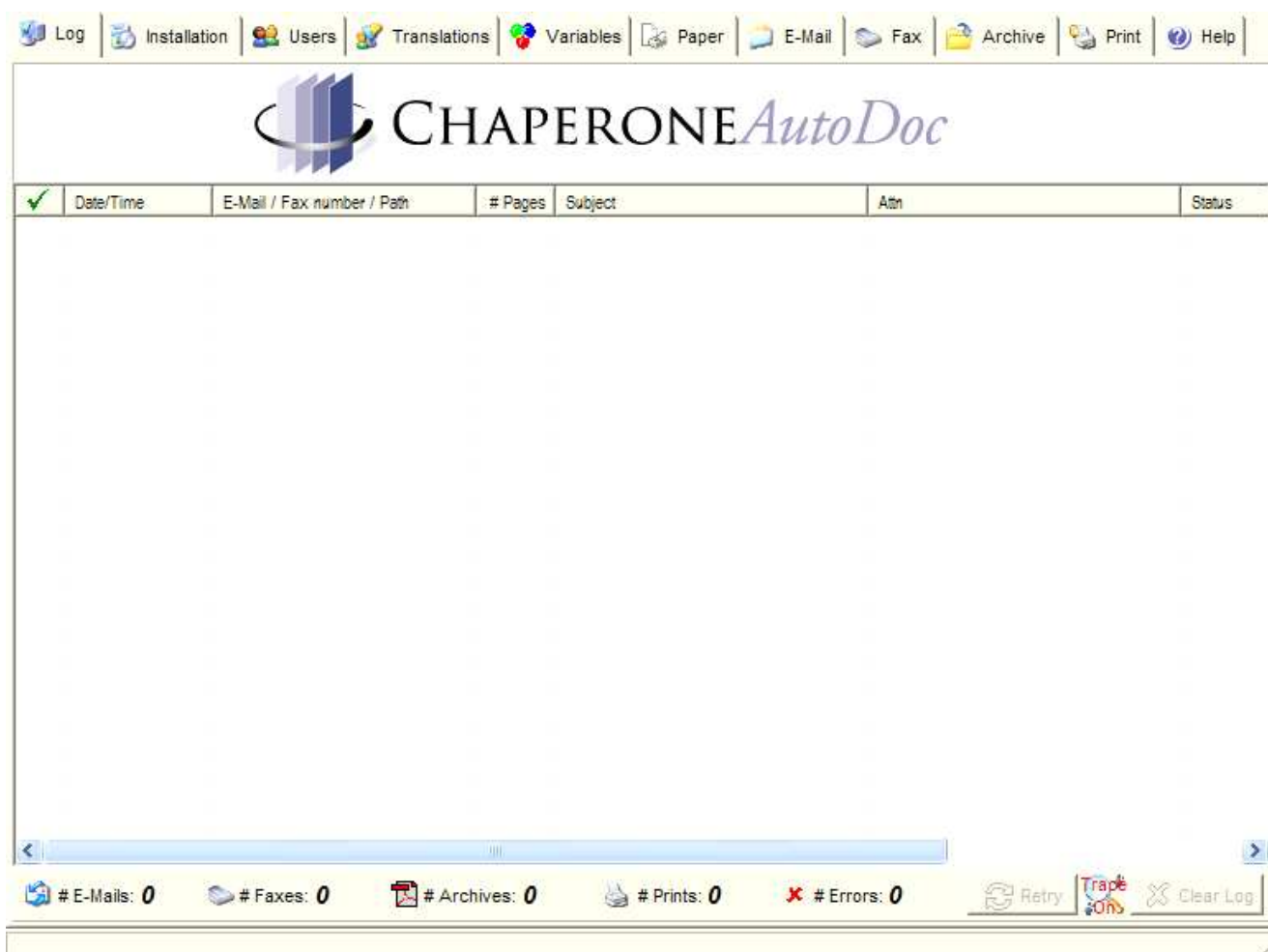
```
H:\Invoices\
```

Global Configuration

The following sections describe the areas of the AutoDoc application which are concerned with the overall AutoDoc system.

Log

The Log tab of AutoDoc provides an overview of the application's activity. The grid view is a log of all document output generated by the AutoDoc printer driver.

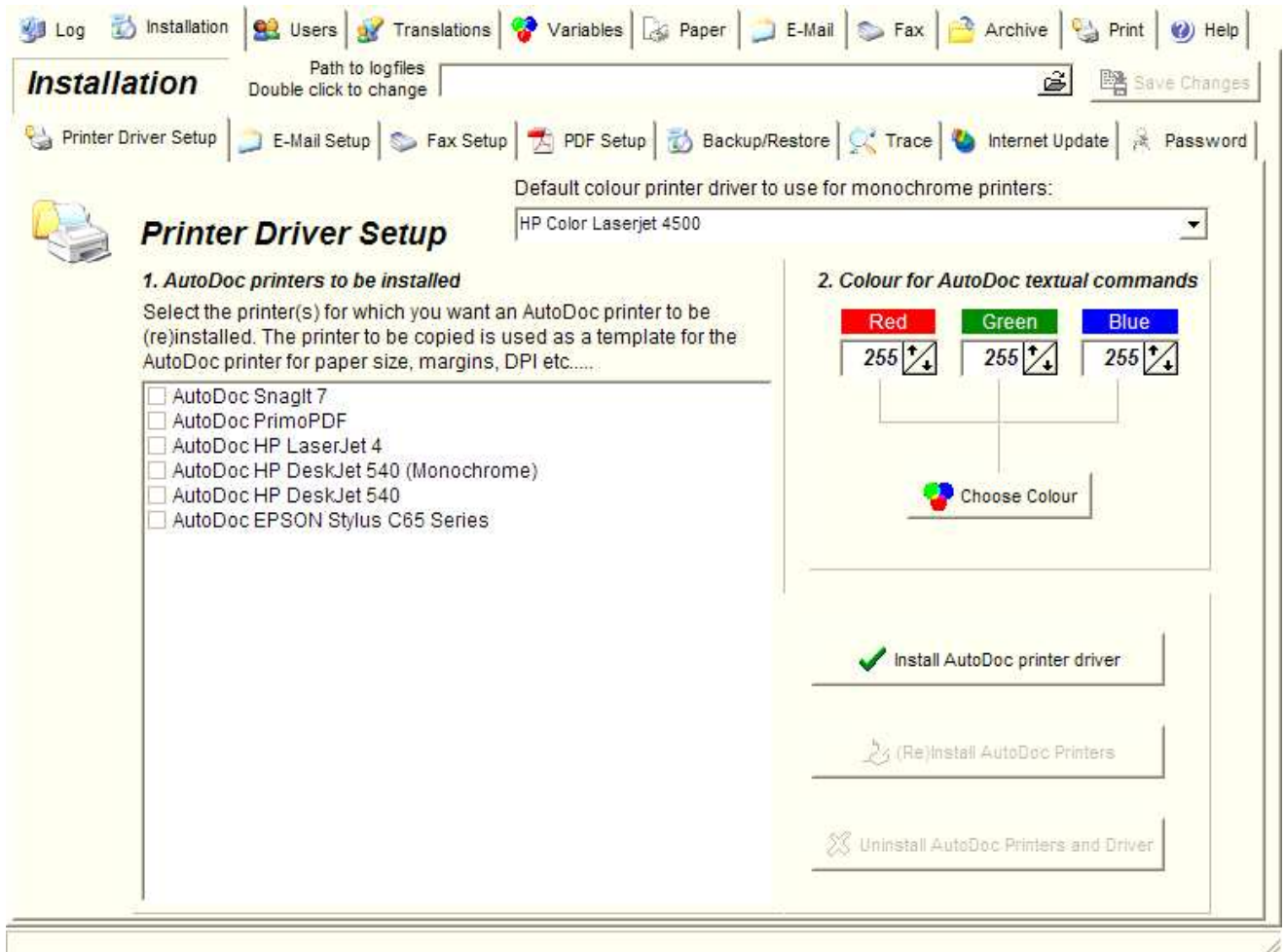


Chapter 7, Using the Log & System Files on page 111, provides detailed information on reading and managing the log.

Installation

The installation tab is used to specify system-wide preferences for AutoDoc, including the mail and fax services to be used, as well as which printer drivers should be replicated by AutoDoc.

The Installation tab is broken down into several sub-areas, each with its own sub-tab:



The following tables provide detail for each of the fields in the Installation tab:

Printer Driver Setup

Field Name	Field Description
<i>Path to logfiles</i>	Use this field to specify a non-default location for the following system files: - Log files. - Copies of e-mails and faxes (if AutoDoc is set to save copies of sent files in this fashion).

	To 'unlock' the field for editing, double click on the field. The associated browse button can then be used to open a directory path. Not specifying a path here will result in AutoDoc storing these files in the default location (which is the 'Data' sub-folder of the AutoDoc program folder). These files are discussed in more detail in Chapter 7. Please note the important information about file paths on page 36.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>Default colour printer driver to use for monochrome printers</i>	This field is used to specify a colour printer driver to replicate when installing an AutoDoc monochrome printer. The name entered here should be the same as the printer name that appears in the Windows 'add printer' list of printers, and should be the closest possible match to the monochrome printer for which you are installing an AutoDoc copy. See page 29 for a discussion of when to use a colour driver for a monochrome printer.
<i>AutoDoc printers to be installed</i>	This list box contains a checklist of the printers AutoDoc has detected as being available to the machine on which AutoDoc is installed. All the printers are prefixed with 'AutoDoc', since by checking the associated checkboxes of these printers, you are electing to make an AutoDoc 'virtual copy' of the installed printer. Use this checklist in tandem with the <i>Install AutoDoc printer driver</i> and/or <i>(Re)Install AutoDoc Printers</i> buttons.
<i>Red:</i>	Use this text field to specify the Red component of the RGB setting that AutoDoc will use to identify textual commands. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Green and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The value specified here will also be the default Red value for new entries in the translation table (as displayed in the Translations tab). A minimum of 0 and a maximum of 255 (as much Red as possible) are allowed. A <i>Red</i> value of 0 is not allowed if both <i>Green</i> and <i>Blue</i> are also 0 (that is, 0,0,0 is not allowed).

<i>Green:</i>	Use this text field to specify the Green component of the RGB setting that AutoDoc will use to identify textual commands. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Red and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The value specified here will also be the default Green value for new entries in the translation table (as displayed in the Translations tab). A minimum of 0 and a maximum of 255 (as much Green as possible) are allowed. A <i>Green</i> value of 0 is not allowed if both <i>Red</i> and <i>Blue</i> are also 0 (that is, 0,0,0 is not allowed).
<i>Blue:</i>	Use this text field to specify the Blue component of the RGB setting that AutoDoc will use to identify textual commands. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Red and Green settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The value specified here will also be the default Blue value for new entries in the translation table (as displayed in the Translations tab). A minimum of 0 and a maximum of 255 (as much Blue as possible) are allowed. A <i>Blue</i> value of 0 is not allowed if both <i>Red</i> and <i>Green</i> are also 0 (that is, 0,0,0 is not allowed).
<i>Choose Colour</i>	Use this button to launch a colour palette to allow you to choose the colour you want to populate the tab's Red, Green, and Blue fields. This button provides an alternative to direct entry into the textual command colour fields. Selecting a colour via the palette defaults that colour's RGB settings into the appropriate fields. Note that choosing a colour via the colour palette is a two-stage process (see Figure 12 on page 67).
<i>Install AutoDoc printer driver</i>	This button is used to install the AutoDoc virtual printer driver(s). See the Initial Configuration section in Chapter 2 for more details on installing the printer driver(s). This button is disabled if an AutoDoc printer driver already exists. If you wish to create more AutoDoc drivers, use the <i>(Re)Install AutoDoc Printers</i> button.
<i>(Re)Install AutoDoc Printers</i>	Use this button if you need to create more AutoDoc virtual printers. For example, if you already created an AutoDoc driver for an inkjet printer, but have

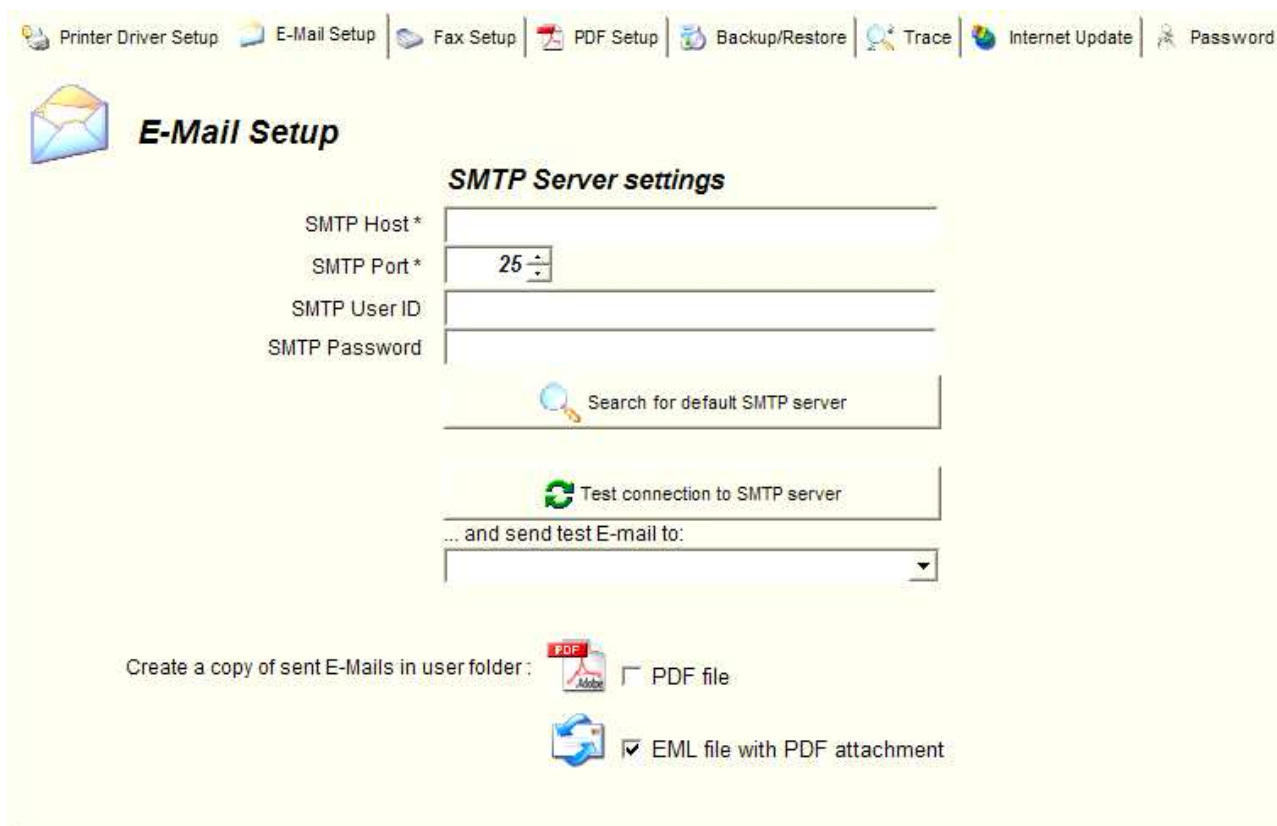
an AutoDoc driver for an inkjet printer, but have recently installed a laser printer which you also want to replicate, you would use this button.

You will be prompted to decide whether you would like to delete any existing AutoDoc printers first. This would be the appropriate action if, for example, you have installed a monochrome AutoDoc printer using an inappropriate colour substitute, and you wish to reinstall it with the correct substitute.

*Uninstall AutoDoc
Printers and Driver*

Use this button to uninstall all AutoDoc printer drivers. This would only normally be performed for troubleshooting purposes.

E-Mail Setup



E-Mail Setup

SMTP Server settings

SMTP Host *

SMTP Port * 25

SMTP User ID

SMTP Password

Search for default SMTP server

Test connection to SMTP server

... and send test E-mail to:

Create a copy of sent E-Mails in user folder:

☐ PDF file

☒ EML file with PDF attachment

Field Name	Field Description
<i>SMTP Host</i>	If you want to use AutoDoc's e-mail functionality, use this text field to enter the name or IP address of your SMTP host. Note that this is a mandatory field if e-mail functionality will be used. It is recommended that you test e-mail settings using the <i>Test Connection</i> button once you have defined a user's e-mail address on AutoDoc's Users tab.
<i>SMTP Port</i>	If you want to use AutoDoc's e-mail functionality, use this text field to enter the port number used for SMTP communication. Note that this is a mandatory field if e-mail functionality will be used. The default value for this field is 25, which is the standard port for SMTP use. It is recommended that you test e-mail settings using the <i>Test Connection</i> button once you have defined a user's e-mail address on AutoDoc's Users tab.
<i>SMTP User ID</i> <i>SMTP Password</i>	Both of these text fields would normally be left blank. However, if, upon testing your AutoDoc e-mail configuration, a user ID and password is requested by

	the SMTP server, contact your network administrator to obtain these details, and then complete these fields.
<i>Search for default SMTP server.</i>	Use this button to let AutoDoc attempt to locate and automatically populate your default SMTP server settings.
<i>Test Connection to SMTP server</i>	Use this button to test AutoDoc's e-mail configuration, once the <i>SMTP Host</i> and <i>SMTP Port</i> fields have been completed. You can optionally complete the <i>...and send test E-mail to</i> field to send a test e-mail (recommended). You will be notified of whether the test was successful.
<i>...and send test E-Mail to:</i>	Use this drop-down list to select a target e-mail address for a test e-mail. Note that you will only be able to specify an address which has been defined as a user e-mail address in the AutoDoc Users tab.
<i>Create a copy of sent e-mails in user folder: PDF file</i>	Use this checkbox to specify that AutoDoc should save a PDF copy of e-mail attachments processed by AutoDoc (that is, a PDF copy of the source document sent to AutoDoc for printing), in the AutoDoc folder of the user who created the e-mail. Please see the discussion on page 119 in Chapter 7 for more information on user folders and their contents.
<i>Create a copy of sent e-mails in user folder: EML with PDF attachment</i>	Use this checkbox to specify that AutoDoc should save an EML copy of e-mail produced by AutoDoc (including both the e-mail message and the PDF attachment), in the AutoDoc folder of the user who created the e-mail. Please see the discussion on page 119 in Chapter 7 for more information on user folders and their contents.

Fax Setup

Fax Setup

Fax program

☐ Symantec WinFax®

☒ Microsoft Fax®

Microsoft Fax Machine name

☒ Create a copy of faxes (to be) sent in user folder (TIF)

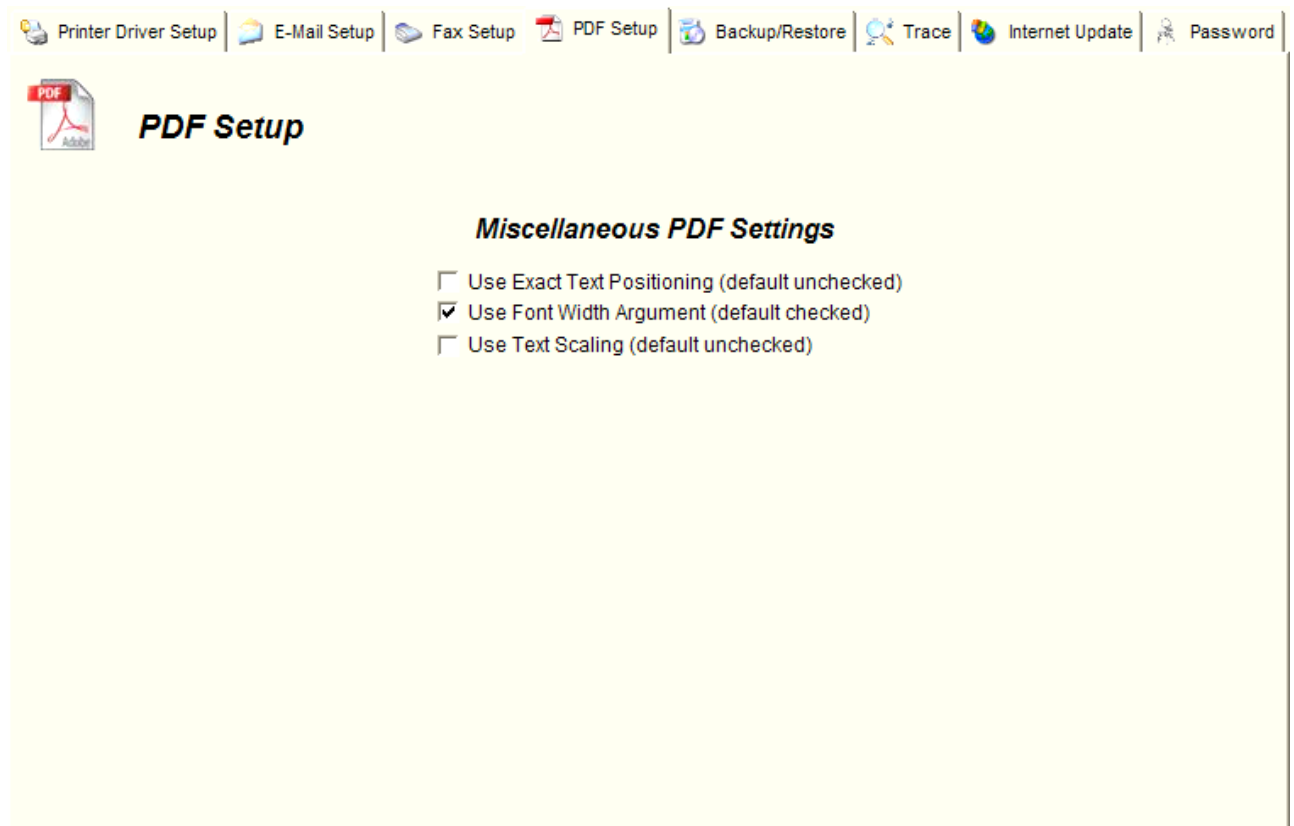
Test connection to Fax server

Launch Microsoft Fax® Console

Field Name	Field Description
<i>Fax program</i>	Use this option button group to specify which fax service will be used by AutoDoc. Some of the options in AutoDoc's Fax tab are only available if the <i>Symantec WinFax</i> option button is chosen. <i>Microsoft Fax</i> is the default selection. Note that Microsoft Fax is included as part of a standard Windows installation. Choosing an option from this group results in the icons and labels of AutoDoc's fax controls changing to reflect the selected service.
<i>Microsoft Fax Machine name</i>	Use this text field to specify the name of the computer upon which Microsoft Fax is installed, in a network environment, if you are having trouble connecting with the fax service. This field can usually be left blank. Note that this field is only visible when <i>Microsoft Fax</i>

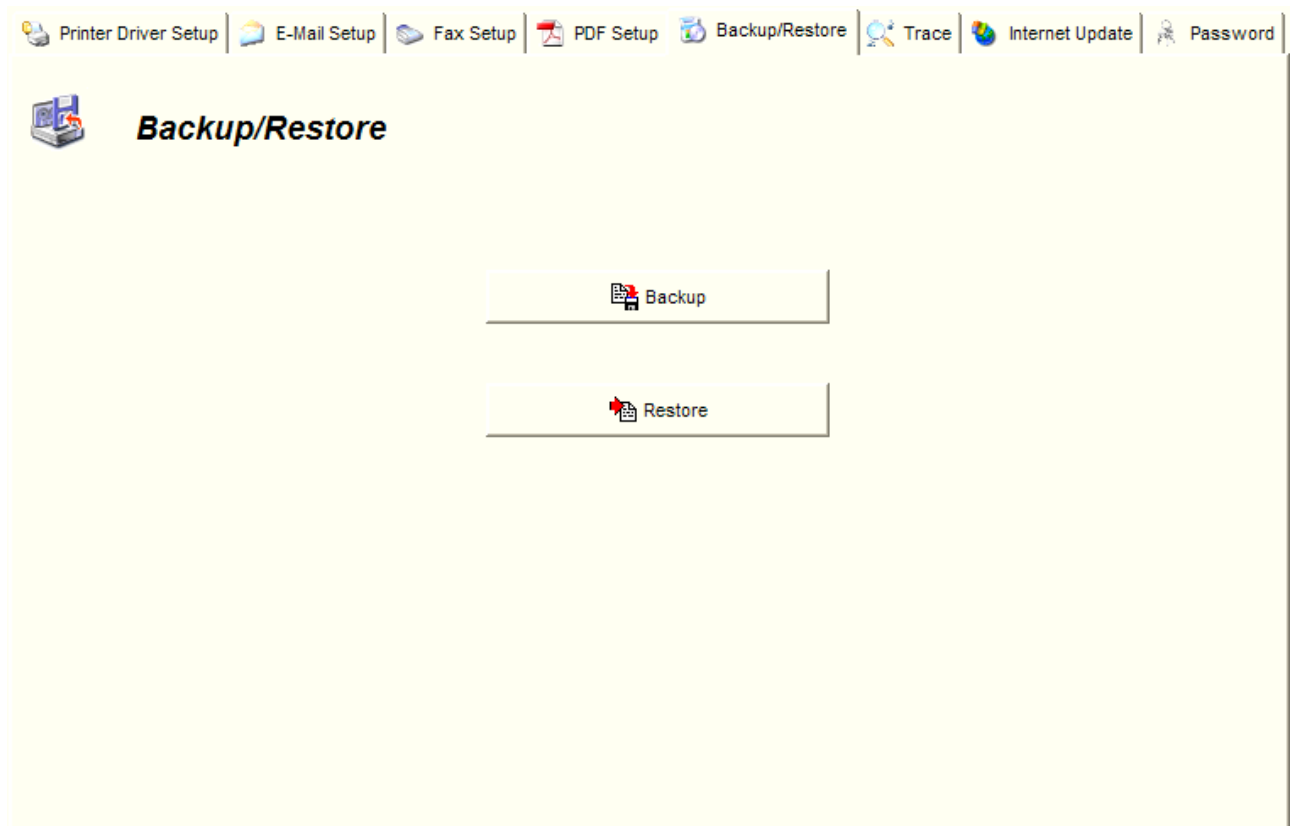
	is chosen as the AutoDoc fax service.
<i>Create a copy of faxes (to be) sent in user folder (TIF)</i>	Use this checkbox to specify that AutoDoc should save a copy of faxes processed by AutoDoc, in the AutoDoc folder of the user who created the fax. Fax files are saved in *.TIF format. Please see the discussion on page 119 in Chapter 7 for more information on user folders and their contents.
<i>Test Connection to Fax server</i>	Use this button to test AutoDoc's communication with Microsoft Fax. You will be notified of whether the test was successful or not. Note that this field is only visible when <i>Microsoft Fax</i> is chosen as the AutoDoc fax service.
<i>Launch WinFax Message Manager</i> OR <i>Launch Microsoft Fax Console</i>	Use this button to launch the interface of the service named in the button's label. The label changes depending on which service is selected from the <i>Fax program</i> option button group. This is a particularly useful feature for troubleshooting documents which are listed in the AutoDoc log as having been sent to the fax service - rather than navigating through the Windows Start Menu to open the service's interface, you can use this button.

PDF Setup



Field Name	Field Description
<i>Use Exact Text Positioning</i>	Use this setting if you have misaligned content in your PDF output files. The default setting for this field is cleared, as it is not normally required.
<i>Use Font Width Argument</i>	Use this setting to match font widths in PDF output. The default setting for this field is checked.
<i>Use Text Scaling</i>	Use this setting if you have misaligned content in your PDF output files. The default setting for this field is cleared, as it is not normally required.

Backup/Restore



Field Name	Field Description
<i>Backup</i>	Use this button to create a backup of AutoDoc's configuration data (as viewed through the AutoDoc console's tabs). You will be prompted to select a file location and file name. The default location is the folder in which AutoDoc was installed. Note that if you ever plan to uninstall AutoDoc, you may wish to create a backup of your configuration settings in a location outside of the AutoDoc directory, since uninstalling AutoDoc will also remove any backups saved to the default location. See page 119 for details on what files are included in the backup.
<i>Restore</i>	Use this button to restore configuration settings from a backup. You will be prompted to select a file location and file name, and prompted to confirm the overwriting of the current settings.

Trace

Printer Driver Setup | E-Mail Setup | Fax Setup | PDF Setup | Backup/Restore | **Trace** | Internet Update | Password

Trace

☐ Switch tracing on

View trace log

Clear trace log

Send Trace Log / AutoDoc Definitions to the support department

(Please contact support before sending a report)

Your name*

Your E-Mail address*

☒ Include the Trace Log

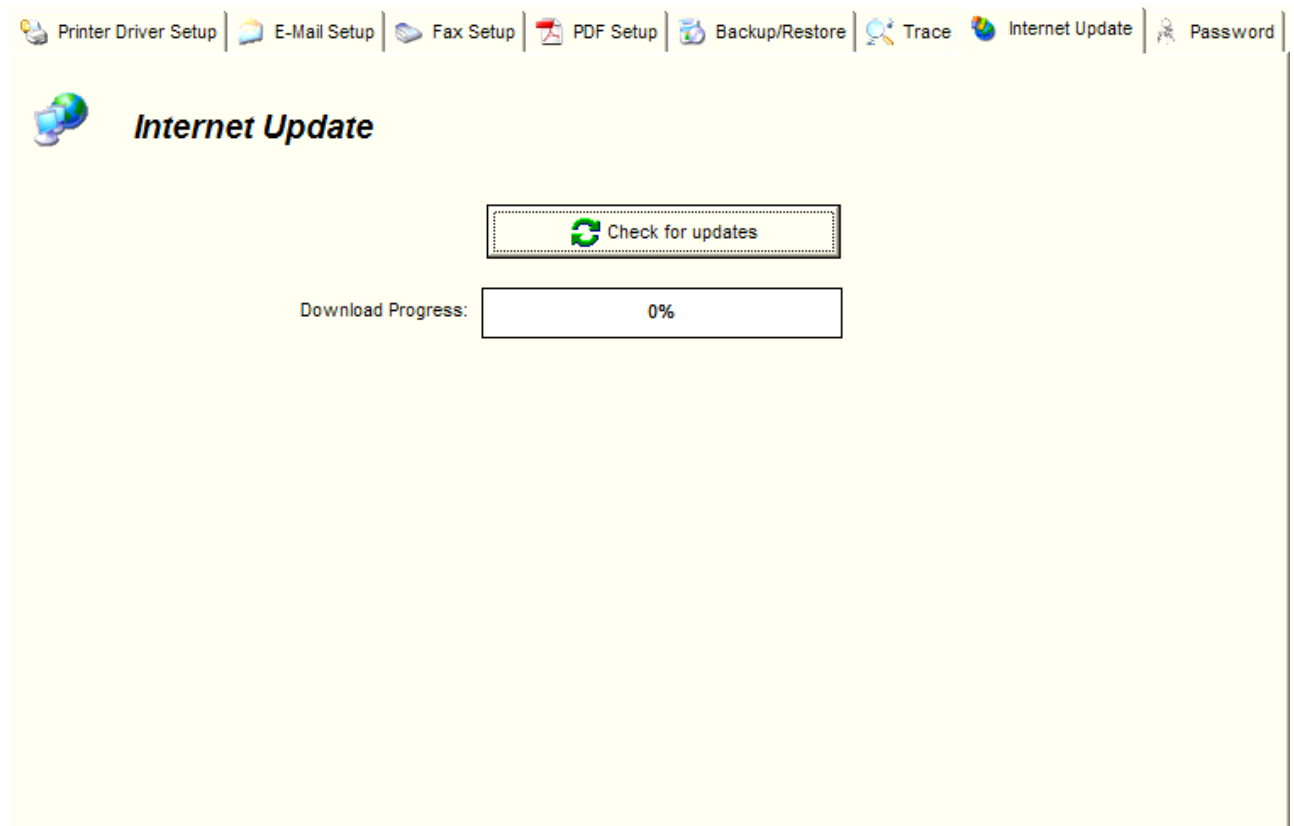
☒ Include a Backup of your AutoDoc definitions

Send

Field Name	Field Description
<i>Switch tracing on</i>	Use this checkbox to instruct AutoDoc to log its internal processes. Tracing is useful for debugging processing problems at a detailed level, but you would normally only use this feature to assist in providing detail for any support issues you may have. If tracing is activated, a flashing notification in the lower right corner of the log page is displayed: 
<i>View trace log</i>	Use this button to display AutoDoc's trace log. This button is disabled if tracing is switched off, or if no entries exist in the trace log.
<i>Clear trace log</i>	Use this button to clear all entries from the trace log. This button is disabled if tracing is switched off, or if no entries exist in the trace log. Note that you are not

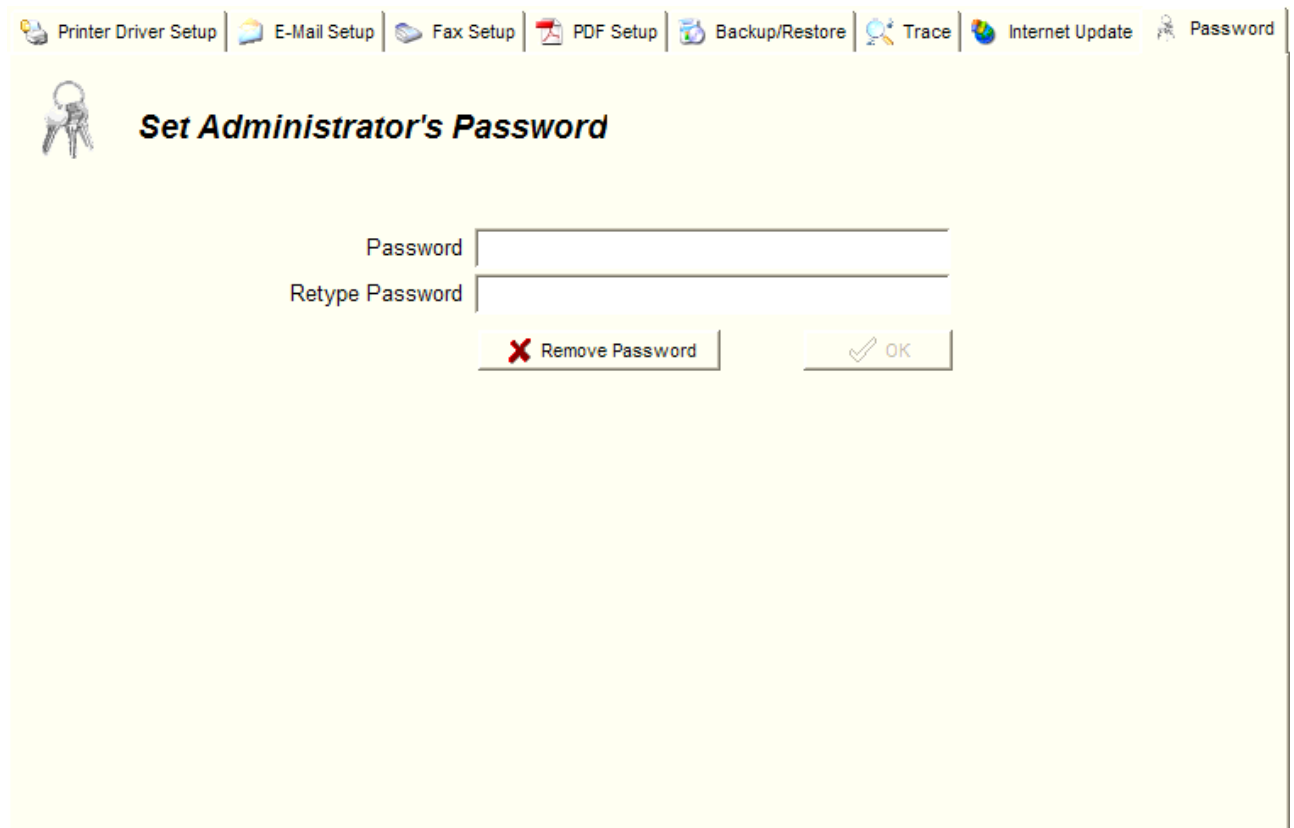
	prompted to confirm your action if you use this button.
<i>Your name*</i>	Complete this field to send information to AutoDoc support.
<i>Your E-Mail address*</i>	Complete this field to send information to AutoDoc support. The associated <i>Send</i> button is disabled until text in the format of a valid e-mail address is entered here.
<i>Include the Trace Log</i>	Use this checkbox to include your trace log in the information sent to AutoDoc support. Note that AutoDoc will not allow both this checkbox and the <i>Include a Backup of your AutoDoc definitions</i> checkbox to be cleared - one or the other (or both) must be checked.
<i>Include a Backup of your AutoDoc definitions</i>	Use this checkbox to include a backup of your AutoDoc settings in the information sent to AutoDoc support. Note that AutoDoc will not allow both this checkbox and the <i>Include the Trace Log</i> checkbox to be cleared - one or the other (or both) must be checked.
<i>Send</i>	Use this button to send information to AutoDoc support. Note than an active connection to the internet is required.

Internet Update



Field Name	Field Description
<i>Check for updates</i>	Use this button to instruct AutoDoc to check for AutoDoc updates available on the internet. If your version of AutoDoc is not the current version as located on the internet, the setup file for the current version will be automatically downloaded to the <code>/updates</code> directory (a sub-directory of the directory to which AutoDoc was installed), and automatically installed. As with all program updates, we strongly recommend that you perform a backup of AutoDoc files before upgrading.

Password

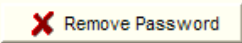
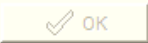


Printer Driver Setup | E-Mail Setup | Fax Setup | PDF Setup | Backup/Restore | Trace | Internet Update | Password

 **Set Administrator's Password**

Password

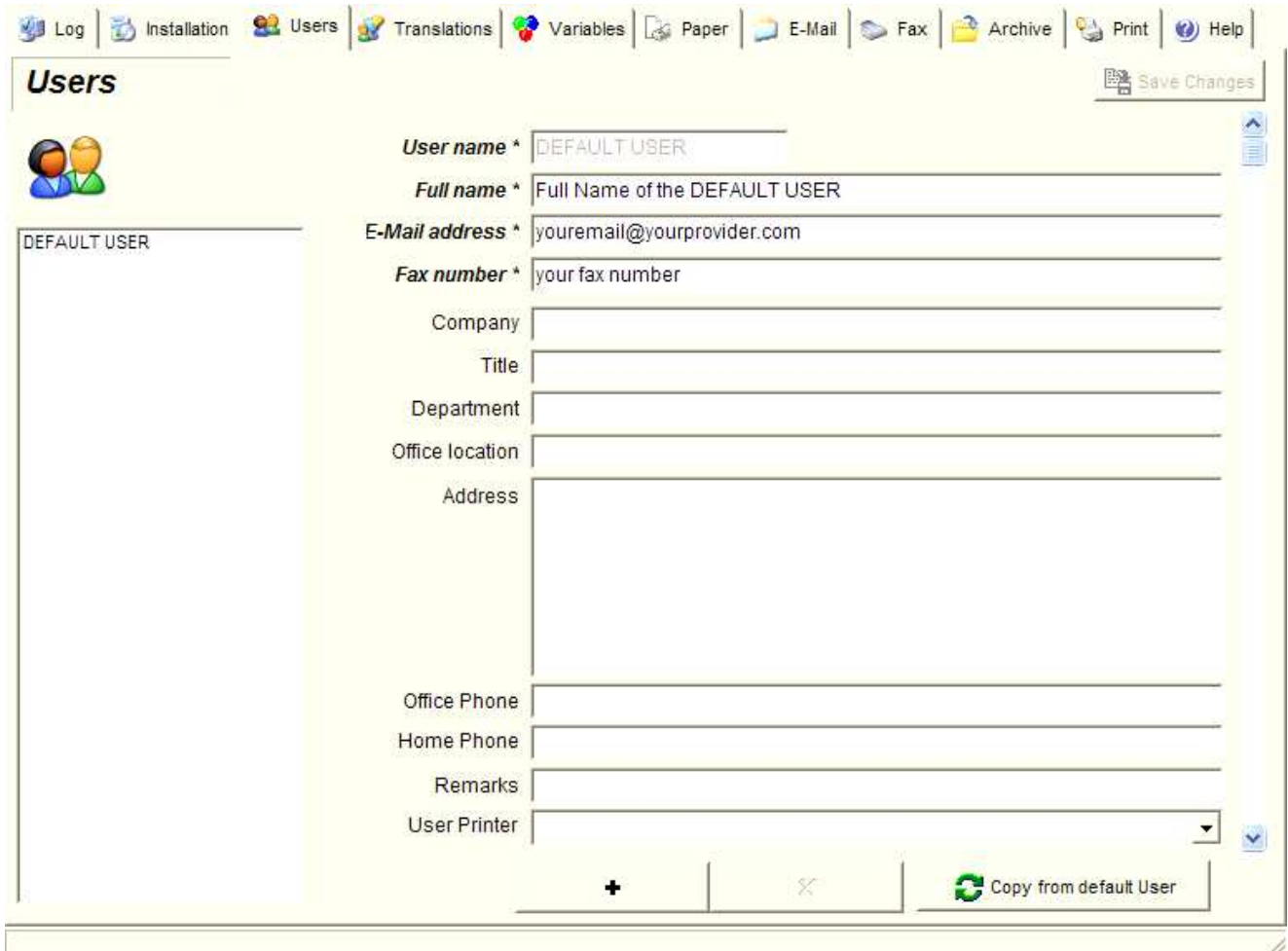
Retype Password

 Remove Password  OK

Field Name	Field Description
<i>Password</i>	Use this field to enter a password to protect your AutoDoc configuration settings.
<i>Retype Password</i>	Use this field to confirm your password. Re-enter the password you entered in the <i>Password</i> field. Note that the password is case-sensitive.
<i>Remove Password</i>	Use this button to remove the AutoDoc password.
<i>OK</i>	Use this button to set the specified password. If the two passwords entered on this tab differ, both fields will be cleared. Note that passwords are case-sensitive.

Users

The Users tab is used to define a profile for each of the users who will be using the AutoDoc printer.



Users

Log Installation **Users** Translations Variables Paper E-Mail Fax Archive Print Help

Save Changes

DEFAULT USER

User name * DEFAULT USER

Full name * Full Name of the DEFAULT USER

E-Mail address * youremail@yourprovider.com

Fax number * your fax number

Company

Title

Department

Office location

Address

Office Phone

Home Phone

Remarks

User Printer

+ ✕ Copy from default User



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

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



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

Once User information has been configured, each AutoDoc user can view a personalised log containing only the deliveries associated with their username. See the section on AutoDoc User Logs (starting on page 116) for more information.

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

Field Name	Field Description
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>Users</i>	This list box shows all the users (equivalent to Windows login usernames) defined for use in the AutoDoc system. To view or edit an existing record, click on a username in the list. Note that the scrollbar at the right of the view facilitates a record-by-record scroll through the user list. Scrolling to the end of the list inserts a new blank record for editing, at the end of the list.
<i>User name</i>	Use this text field to enter the Windows login username you want to record as an AutoDoc user. In the case of the Default User, this field cannot be edited. This is a mandatory field. This field's variable name is %username%.
<i>Full name</i>	Use this text field to enter the full name of the person who uses the Windows login username specified in the <i>User name</i> field. This is a mandatory field. This field's variable name is %fullname%.
<i>E-Mail address</i>	Use this text field to enter the e-mail address of this user. This address can then be used as a Carbon Copy ('CC') or Blind CC ('BCC') e-mail address for document delivery. This is a mandatory field. Only entries in a valid e-mail address format are

	accepted in this field. Note that, depending on your SMTP policy, the e-mail address entered here may need to be associated with the SMTP host specified on the Installation tab. Many Internet Service Providers validate the domain name of a sender's e-mail address, which will result in e-mails sent from an AutoDoc user being 'bounced' back if the domain specified is not that of the SMTP host (or indeed if the username component of the e-mail address doesn't correspond to an existing user of that domain). This field's variable name is %emailaddress%.
<i>Fax number</i>	Use this text field to enter the contact fax number applicable to this user. This is a mandatory field. This field's variable name is %faxnumber%.
<i>Company</i>	Use this text field to enter the company name. This field's variable name is %company%.
<i>Title</i>	Use this text field to enter the user's title/position description. This field's variable name is %title%.
<i>Department</i>	Use this text field to enter the department within the company to which this user belongs. This field's variable name is %department%.
<i>Office location</i>	Use this text field to enter the location of the user's office. Note that there is another field for the user's postal address, so office location could be used to specify a floor number, a building name, or a combination of such information. This field's variable name is %officelocation%.
<i>Address</i>	Use this text field to enter the user's address. This can be a multi-line entry including all data in a postal address such as postal/zip code. This field's variable name is %address%.
<i>Office phone</i>	Use this text field to enter the office contact number of the user. This field's variable name is %officephone%.
<i>Home Phone</i>	Use this text field to enter the after hours contact number of the user. This field's variable name is %homephone%.

<i>Remarks</i>	Use this text field to record miscellaneous information for the user. This field's variable name is %remarks%.
<i>User Printer</i>	Use this drop-down list to specify the real printer to which this user's documents may be printed. All printers available to the machine on which AutoDoc is installed are available for selection. This information is used by another setting in AutoDoc's Print tab, as an option to print a copy of documents to the printer associated with the user who created the print job.
+	Use this button to insert a new record for editing. The new record is inserted in the <i>Users</i> list in the position immediately before the record displayed prior to using the button.
-	Use this button to delete the record of which the details are currently displayed. You will be prompted to confirm your action. This button is not available if the details displayed are for the Default User, as the Default User cannot be removed from the system.
×	Use this button to discard changes made to the details displayed.
<i>Copy from default User</i>	Use this button to populate any blank fields in the current details with the values for these fields specified for the Default User. Note that using this button does not copy the <i>User name</i> or <i>Full name</i> of the Default User.

Translations

The Translations tab is used to specify any translations to be applied to specific text strings of a specified colour.

Translations

Choose Colour

Text to AutoDoc command translations:

Field contents	Red	Green	Blue	Translates to AutoDoc command
▶				



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

For example, suppose a Microsoft Word template is used as a cover letter for new employee induction material. This template has the following sentence with mail-merge fields:

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

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

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

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

procedures for the ??? department

...with an RGB setting of 21,21,21.

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

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

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

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

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

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

Please note the important information about file paths on page 36. Please also see the following field definitions for the translations table for more information on wildcards.

A maximum of 999 translations can be defined.

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

Field Name	Field Description
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>Choose Colour</i>	Use this button to launch a colour palette to allow you to choose the colour you want to populate the tab's Red, Green, and Blue fields. This button provides an alternative to double-clicking on the translation row for which you would like to choose a colour.

	To activate the colour palette for a particular translation row, first position the cursor within the row then click the <i>Choose Colour</i> button. Selecting a colour via the palette defaults that colour's RGB settings into the appropriate fields. Note that choosing a colour via the colour palette is a two-stage process (see Figure 12 on page 67).
<i>Field contents</i>	Use this text field to define one half of an AutoDoc text to textual command translation. This text field defines the text string for which AutoDoc will look for an exact match, in combination with the RGB values. A maximum of 128 characters can be entered here. Note that entries here: ▪ are case-sensitive ▪ must represent the entire text string of the specified colour (unless wildcards are used) ▪ can include wildcards provided that the wildcard 'mask' matches the text string in regard to number of characters. For example: ▪ ABC in <i>Field contents</i> will result in 'abc' in a print job being ignored (because of case difference). ▪ ABC in <i>Field contents</i> with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being ignored - an exact match is required. ▪ ABC ?????????? in <i>Field contents</i> with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being recognised (same number of wildcards as characters in 'Automotive'). ▪ ABC ?????????????????????????????? in <i>Field contents</i> with RGB 21,21,21 will result in 'ABC Automotive' in RGB 21,21,21 in the print job being ignored - because the wildcard mask requires more characters than are in the document with RGB 21,21,21.
<i>Red:</i>	Use this text field to specify the Red component of the RGB setting that AutoDoc will use to identify translations. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Green and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The default value for this field is determined by the

	Red value specified for textual commands. A minimum of 0 and a maximum of 255 (as much Red as possible) are allowed.
<i>Green:</i>	Use this text field to specify the Green component of the RGB setting that AutoDoc will use to identify translations. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Red and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The default value for this field is determined by the Green value specified for textual commands. A minimum of 0 and a maximum of 255 (as much Green as possible) are allowed.
<i>Blue:</i>	Use this text field to specify the Blue component of the RGB setting that AutoDoc will use to identify translations. Numbers can be manually entered, increased or decreased via the up and down buttons, or populated in tandem with the Red and Green settings via the colour palette which is accessed with the <i>Choose Colour</i> button. The default value for this field is determined by the Blue value specified for textual commands. A minimum of 0 and a maximum of 255 (as much Blue as possible) are allowed.
<i>Translates to AutoDoc command</i>	Use this text field to define one half of an AutoDoc text to textual command translation. This text field defines the command to which AutoDoc will convert the specified text string (as specified in the <i>Field contents</i> field), in combination with the RGB values. A maximum of 128 characters can be entered here. Note that entries here: ▪ can be an e-mail address, fax number, fax scheduling command, language abbreviation, or file path/name of a file to be attached (note that a browse button becomes available once text editing focus is passed to the field). ▪ are not case-sensitive, except for the two-character language commands, which must be capitalised (for example, EN for English or FR for French). See page 72 for more information on language selection. ▪ can include superfluous wildcards For example: ▪ ABC ?????????? in <i>Field contents</i> with RGB 21,21,21 will result in 'ABC Automotive' in

RGB 21,21,21 in the print job being recognised (same number of wildcards as characters in 'Automotive'). If a filename in the *Translates to AutoDoc command* field is entered c:\clients\ABC ??????????????.doc, AutoDoc will look for c:\clients\ABC Automotive.doc, not c:\clients\ABC Automotive .doc (that is, the empty wildcards are ignored).

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

Please note the important information about file paths on page 36.

Help/Licence

The Help/Licence tab serves several functions:

- Provides AutoDoc version information.
- Provides links to sample documentation (these are files which have been pre-configured for use with AutoDoc to demonstrate AutoDoc's functionality).
- Provides a link to the AutoDoc Reference Guide (which you are now reading).
- Provides the means of licensing your copy of AutoDoc.

Please contact ID Data(www.iddata.nl) for information on licensing your copy of AutoDoc. Note that you can use the trial version of AutoDoc to test its full functionality, but the trial version output is stamped with a 'trial version' watermark.

Form Configuration

The AutoDoc tabs described in this section provide the means of configuring the system's 99 different forms.

The Variables tab is the first to feature the *Form #* and *Form description* text fields (see Figure 11), which are used to identify the form to which the associated settings apply.

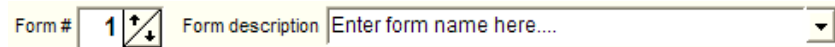
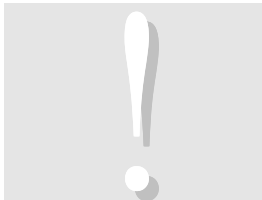


FIGURE 11 - The form number and description fields, which appear on all AutoDoc tabs which have form-based content. The up and down arrows associated with the *Form #* field allow you to increase or decrease the form number (and associated description), while the drop-down arrow associated with the *Form description* field allows you to pick the form you wish to recall, from a list of available descriptions.

These two text fields exist in, and apply to, each of the other form-based tabs described in this section. When a form number is selected in any of these tabs, all the settings for that form in *all* form-related tabs, are recalled.

For example, if form 2 is specified in the *Paper* view, form 2 will remain selected when focus moves to the *E-Mail* view. Similarly, if form 1 is then selected in the *E-Mail* view, a subsequent move back to the *Paper* tab recalls the *Paper* settings for form 1.



Be aware that the name you give to a form will also be assigned as the filename of the e-mail attachments produced by that form.

Variables

The Variables tab is used to define the RGB values that AutoDoc will look for to identify user-defined variables.

Field name	Red	Green	Blue	Attach Header
Variable 1	1	1	1	☐
Variable 2	2	2	2	☐
Variable 3	3	3	3	☐
Variable 4	4	4	4	☐
Variable 5	5	5	5	☐
Variable 6	6	6	6	☐
Variable 7	7	7	7	☐
Variable 8	8	8	8	☐
Variable 9	9	9	9	☐
Variable 10	10	10	10	☐
Variable 11	11	11	11	☐
Variable 12	12	12	12	☐
Variable 13	13	13	13	☐
Variable 14	14	14	14	☐
Variable 15	15	15	15	☐
Variable 16	16	16	16	☐
Variable 17	17	17	17	☐
Variable 18	18	18	18	☐
Variable 19	19	19	19	☐
Variable 20	20	20	20	☐



As well as the 20 user-definable names available for variables 1-20, these also have a 'global name' which can be used instead of the name specified in the *Field name* field. This global name is simply the number of the variable. For example, the first variable is known as %Variable 1% by default, but is also known to AutoDoc simply as %1%. Even if you rename variable 1 to %doctype%, AutoDoc will still recognise this variable as %1%, as well as %doctype%. Note also that the global name %1% applies to all forms - while variable 1 may be %doctype% in form 1, and %salesrep% in form 2, in both forms variable 1 is still known as %1%.

The 20 user-defined variables can also be manipulated for delivery output so that only a part of the variable is used. This is achieved via a 'trimming function', which has the following syntax:

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

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

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

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

...the subject would be constructed as:

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

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

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

Field Name	Field Description
<i>Form #</i>	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99. The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.

<i>Field name</i>	Use this column to specify the names by which the 20 user-defined variables will be known, for the particular form you are currently defining. By default, variable names are 'Variable 1' through to 'Variable 20' (though AutoDoc does have some pre-configured forms with different variable names), which means they can be used in other areas of AutoDoc as %variable 1% through to %variable 20%, but the variables can be renamed to suit your needs. A variable cannot be given the same name as a pre-defined system variable, such as %username%.
<i>Red</i>	Use this column to specify the Red component of the RGB setting that AutoDoc will use to identify the 20 user-defined variables, for this particular form number. Numbers can be manually entered, or populated in tandem with the Green and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. A minimum of 0 (no Red) and a maximum of 255 (as much Red as possible) are allowed.
<i>Green</i>	Use this column to specify the Green component of the RGB setting that AutoDoc will use to identify the 20 user-defined variables, for this particular form number. Numbers can be manually entered, or populated in tandem with the Red and Blue settings via the colour palette which is accessed with the <i>Choose Colour</i> button. A minimum of 0 (no Green) and a maximum of 255 (as much Green as possible) are allowed.
<i>Blue</i>	Use this column to specify the Blue component of the RGB setting that AutoDoc will use to identify the 20 user-defined variables, for this particular form number. Numbers can be manually entered, or populated in tandem with the Red and Green settings via the colour palette which is accessed with the <i>Choose Colour</i> button. A minimum of 0 (no Blue) and a maximum of 255 (as much Blue as possible) are allowed.
<i>Attach</i>	This column of checkboxes can be used to create various file types which have contents based on variables. For example, you could create an XML or text file based on variables, formatted according to the header/detail rules specified in the <i>Header</i> column. By checking a checkbox in this column, you are

	instructing AutoDoc to include the associated variable as file content in any of the non-PDF e-mail file types specified in the E-Mail tab. See page 73 for more details on file attachments.
<i>Header</i>	Use this column of checkboxes to specify which variables are header items in file output. Any variable for which the <i>Attach</i> checkbox is checked, will be treated as a header item if the <i>Header</i> checkbox is checked, and a detail item if the <i>Header</i> checkbox is cleared.
<i>Choose Colour</i>	Use this button to launch a colour palette to allow you to choose the colour you want to populate the Colour tab's Red, Green, and Blue fields. This button provides an alternative to double-clicking on the row for which you would like to choose a colour. Note that the button applies to each of the 20 rows in the table. To activate the colour palette for a particular row, first position the cursor within the row, then click the <i>Choose Colour</i> button. Selecting a colour via the palette defaults that colour's RGB settings into the appropriate fields. Note that choosing a colour via the colour palette is a two-stage process (see Figure 12 on page 67).
<i>Restore Variables</i>	Use this button to discard any changes made to the current form's 20 user-defined variables since the last time they were saved. You will be prompted to confirm your action.
<i>Copy from form:</i>	Use this drop-down list to choose a form from which you would like to copy settings for the 20 user-defined variables.
<i>Start copy</i>	Use this button to copy the 20 user-defined variable settings from the form specified in the <i>Copy from form</i> drop-down list, into the current form.

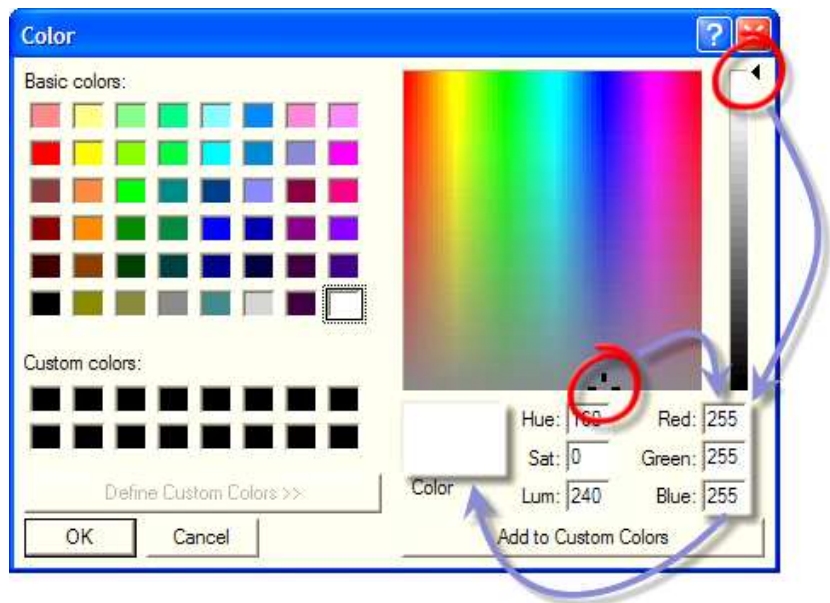


FIGURE 12 - The Colour palette as launched via the *Choose Colour* button. Note the two highlighted controls that contribute to the RGB setting. Moving the crosshairs, and sliding the vertical luminosity control (the black arrow), will both change the RGB settings, which in turn change the displayed colour in the 'Color' preview pane. ***Moving the crosshairs alone will not produce the RGB settings for the colour targeted by the crosshairs.*** First move the crosshairs, then slide the black arrow up or down, watching the 'Color' preview pane to match the colour you want.

Paper

The Paper tab allows AutoDoc to emulate pre-printed stationery. Just as your organisation may use pre-printed stationery with a company logo and letterhead, you can achieve the same effect with AutoDoc-processed documents (without the expense of buying the stationery!)

The screenshot shows the 'Paper' configuration window in AutoDoc. The window has a menu bar with options: Log, Installation, Users, Translations, Variables, Paper, E-Mail, Fax, Archive, Print, and Help. Below the menu bar, the 'Paper' tab is selected. The main area is divided into two sections: 'First Page' and 'Subsequent Pages'. Each section contains a large white box for the letterhead/logo. Below each box are buttons for 'Load Image' and 'No Image'. The 'Form #' is set to 1, and the 'Description' field contains the text 'Enter form name here...'. A 'Save Changes' button is in the top right corner.

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

- preferably create a blank page file which features only the letterhead logo (this method will give the best results in terms of smaller file size and quality), or
- scan a blank page featuring this letterhead.

...and use that file as AutoDoc's pre-printed 'paper'.

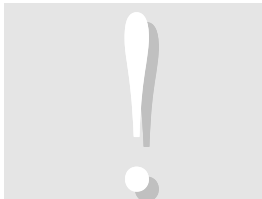


Note that the specified paper will be applied automatically to any e-mail and fax deliveries, and optionally to archive and printed deliveries processed with a form for which paper has been specified (these options are specified in the Archive and Print pages respectively). You need to allow blank space for the

letterhead in any documents which you send to an AutoDoc form/delivery method which has paper specified.

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

AutoDoc requires a *.JPG/*.JPEG file format for paper.



Note that the image you select should be a full page with the artwork positioned where you want it to appear in printed pages. Loading just a logo file itself will generally produce unsatisfactory results as it will be centred on the page and scaled to take up the entire width of the page.

The following table provides detail for each of the fields in the Paper tab:

Field Name	Field Description
<i>Form #</i>	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99. The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.

<i>First Page</i>	This pane displays the image which will be included on the first page of documents generated under the associated AutoDoc form number. The image seen here is effectively how a completely blank first page would appear if printed to an AutoDoc printer under this form number. Double-clicking on the image itself performs the same function as clicking the <i>Load Image</i> button, allowing a file selection to be made.
<i>Subsequent Pages</i>	This pane displays the image which will be included on all pages, except the first, of documents generated under the associated AutoDoc form number. The image seen here is effectively how a completely blank page would appear if printed to an AutoDoc printer under this form number. Double-clicking on the image itself performs the same function as clicking the <i>Load Image</i> button, allowing a file selection to be made.
<i>Load Image</i>	Use these buttons to select a JPG/JPEG file to be used as paper for the associated <i>First Page</i> or <i>Subsequent Pages</i> setting. The default location in which AutoDoc looks for image files is the program directory, which is usually C:\Program files\AutoDoc. Please see page 36 for an important note on file locations.
<i>No Image</i>	Use these buttons to remove the image from the associated <i>First Page</i> or <i>Subsequent Pages</i> pane. With no image selected, the page from an AutoDoc delivery will appear with only the information originally sent to the printer (that is, with no additional letterhead).

E-Mail

AutoDoc-processed pages which include an e-mail address in text of the colour specified as designating textual commands (or text that is translated to an e-mail address), are converted into PDF format and attached to an e-mail which is sent to that address. The PDF attachment is given the name of the form which processed the print job.

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

The screenshot shows the 'E-Mail' configuration window in AutoDoc. The window has a menu bar at the top with options: Log, Installation, Users, Translations, Variables, Paper, E-Mail, Fax, Archive, Print, and Help. Below the menu bar, the 'E-Mail' tab is selected. The window is divided into several sections:

- Form #**: 1 (with a dropdown arrow)
- Description**: Enter form name here.... (with a dropdown arrow)
- Save Changes**: Button
- CC to User**: NO CC (dropdown)
- BCC to User**: NO BCC (dropdown)
- Attachments**:
 - PDF (selected icon)
 - XML (icon)
 - XLS (icon)
 - XLT (icon)
 - TXT (icon)
- PDF Attachment JPEG quality**:
 - 10% (radio)
 - 50% (radio)
 - 100% (radio)
 - 25% (radio)
 - 75% (radio, selected)
- PDF Attachment DPI**:
 - 72 (radio)
 - 288 (radio)
 - 600 (radio)
 - 144 (radio, selected)
 - 300 (radio)
 - 1200 (radio)
- Mail type**:
 - HTML (radio, selected)
 - Plain Text (radio)
- View message as**:
 - HTML (radio)
 - Plain Text (radio, selected)
- Message**: Large text area for the email body.
- Subject**: Text field for the email subject.
- Extra file(s) to attach to the email**: Text area for additional attachments. Below it, a note states: 'Filename(s) can contain wildcards, user defined and system variables.'
- Word wrap**: Checkmark icon.
- Language**: A row of language flags and names: English (EN), Français (FR), Deutsch (DE), Español (ES), Italiano (IT), Português (PT), Nederlands (NL), and a Danish flag.
- Send mail using User profile**: CREATOR/OWNER (dropdown)
- Override E-Mail address with E-Mail address of user**: NO OVERRULE (dropdown)

The fields in the E-Mail tab are used to define a 'template' of e-mail settings for the form in question. For example, you can specify who will receive CC e-mails in addition to the main recipient, and the text (and, optionally, HTML content) that will be seen in the body of the e-mail.

The E-Mail tab also includes the following functionality:

- Language 'sub-forms'

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

Language ‘Sub-Forms’

Each form has the option of making a separate ‘sub-form’ for each major European language, by using the language tabs at the bottom of the screen. For example, if you have English-speaking customers, and German-speaking customers, you could configure form 1 for invoices, and set up both the English and German tabs of form 1 so that they contain an appropriate message in the applicable language.



Figure 13 - depicting the use of language tabs to create ‘sub-forms’ within a form. The same subject and message is added to both tabs, in the corresponding language.

Figure 13 depicts this example. An invoice report which is sent to an AutoDoc printer would then be scanned for language commands. If no command is specified, the default language is used. The default language is specified on left-most language tab, and can be changed by first selecting the left-most tab, then right-clicking on it, and choosing a new default language.

A language command can be specified in a document by adding the two-letter abbreviation (which appears on the tab next to the full language name) in the colour specified for AutoDoc commands. Using the above example, adding the text:

DE

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

It is of course possible to use the AutoDoc sub-forms for a purpose other than language support. For example, form 1 could be used for invoices, and the English tab could be configured as per the example in Figure 13, while a different language tab could be used to resend invoices which have not been paid on time, with a reminder message in the body of the e-mail.

XML-type File Attachments

The Variables tab allows for each of the user-defined variables to be configured as content to be included in an e-mail file attachment. This could potentially allow for, for example, an invoice report to produce an XML file which has an invoice header and detail lines based on user-defined variables (that is, based on the content of the 'paper' invoice). The resultant file attachment formats are specified in the E-Mail tab via the *Attachments* buttons:



Extra File Attachments

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

Please note the important information about file paths on page 36.

The following table provides detail for each of the fields in the E-Mail tab:

Field Name	Field Description
<i>Form #</i>	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99. The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any

	attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>CC to User</i>	Use this drop-down list to specify an AutoDoc user to whom a CC (Carbon Copy) e-mail will be sent. In addition to all users created in the Users tab, the following possible CC entries exist in the drop-down list: ▪ 'NO CC' - this is the default entry, and specifies that a CC e-mail will not be created. ▪ 'CREATOR/OWNER' - specifies that a CC e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail. ▪ DEFAULT USER - specifies that a CC e-mail will be sent to the e-mail address of the Default User (as specified in the Users page).
<i>BCC to User</i>	Use this drop-down list to specify an AutoDoc user to whom a BCC (Blind Carbon Copy) e-mail will be sent. Blind Carbon Copy e-mails appear to the BCC recipient as a normal e-mail, but in the e-mails received by the other addressees, the BCC recipient's name is not listed as a recipient (hence the term 'blind' - only the BCC recipient and the sender can see that the BCC recipient received a copy of the e-mail). In addition to all users created in the Users tab, the following possible BCC entries exist in the drop-down list: ▪ 'NO BCC' - this is the default entry, and specifies that a BCC e-mail will not be created. ▪ 'CREATOR/OWNER' - specifies that a BCC e-mail will be sent to the e-mail address associated with the user (as specified in the Users tab) who sent the print job to AutoDoc. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the

	CREATOR/OWNER for the e-mail. ▪ DEFAULT USER - specifies that a BCC e-mail will be sent to the e-mail address of the Default User (as specified in the Users page).
<i>Attachments</i>	This option button group is used to specify the file format(s) into which the documents printed to AutoDoc will be converted and included as an e-mail attachment. The default setting is for only PDF attachments to be created. The other possible formats are used to include XML (or XML-type) attachments based on the header/detail definitions specified for variables in the Variables tab.
<i>PDF Attachment JPEG Quality</i>	Use this option button group to specify the quality of any JPEG files used for graphics in the PDF version of the source document which will be attached to the e-mail. The JPEG quality chosen will affect the size of the PDF file, and therefore the e-mail to which it is attached. The size will be more dramatically affected by documents featuring a lot of non-textual content (for example, charts, logos, and pictures).
<i>PDF Attachment DPI</i>	Use this option button group to specify the quality of any JPEG/BMP files used for graphics in the PDF version of the source document which will be attached to the e-mail. The DPI (Dots Per Inch) chosen will affect the size of the PDF file, and therefore the e-mail to which it is attached. The size will be more dramatically affected by documents featuring a lot of non-textual content (for example, charts, logos, and pictures). The default value is 144 DPI.
<i>Mail type</i>	Use this option button group to specify the format in which e-mails will be sent via this form. Note that even if you elect to send e-mail in HTML format, and accordingly construct your message in HTML format, it is possible that the recipient will not receive the message in HTML format, depending on the capabilities and settings of their e-mail application.
<i>View message</i>	Use this option button group to specify how you view the defined message in this AutoDoc tab. This setting has no effect on the e-mailed output. If you have used HTML to construct the e-mail message, and choose to view your message in HTML format, you may need an active Internet connection

	to view any online content. The <i>HTML</i> option, which is the default, is not available if the <i>Mail type</i> option button group is set to <i>Plain Text</i>.
<i>Subject</i>	Use this text field to enter, optionally, the subject heading that will appear on e-mails created with this form. All the AutoDoc variables can be used in this field. For example, you could enter the subject heading as: <pre>%doctype% for account %accnumber% from %company%.</pre> ...where <i>%doctype%</i> and <i>%accnumber%</i> are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc printer could then result in an e-mail with the subject heading 'Tax Invoice for account 34456 from XYZ Electrical Company.' For a complete list of the pre-defined variables available, see the section entitled Pre-defined System Variables on page 25 or, alternatively, activate this field's tool tip by letting the mouse pointer hover over the field for a second or two. Note that an e-mail's subject heading has a maximum length of 255 characters.
<i>Message</i>	Use this field to enter, optionally, the main e-mail body text that will appear in e-mails created with this form. You can create an e-mail message for plain text, or construct an HTML-based e-mail complete with online content. The <i>Load HTML file</i> button can also be used to add HTML content to the message. All the AutoDoc variables can be used in this field. For example, you could include the following in the message: <pre>Please find attached your %doctype% of %docdate%. If you have any queries, please don't hesitate to contact me on %officephone%.</pre> ...where <i>%doctype%</i> and <i>%docdate%</i> are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc printer could then result in an e-mail with the text 'Please find attached your Tax Invoice of 30/04/2005. If you have any queries, please don't hesitate to contact me on 1234 5678.'

	For a complete list of the pre-defined variables available, see the section entitled Pre-defined System Variables on page 25 or, alternatively, activate this field's tool tip by letting the mouse pointer hover over the field for a second or two.
<i>Word wrap</i>	Use this checkbox to modify the view of the <i>E-mail message</i> field, to force long text strings to wrap and remain in view without using the horizontal scrollbar. Note that this checkbox only affects the display of the text within AutoDoc, not the text as it appears in the e-mail produced. This checkbox is only available if the <i>View message as Plain Text</i> option is selected.
<i>Load HTML file</i> 	Use this button to add HTML content from a file to the e-mail message.
<i>Extra files to attach</i>	Use this field to specify the paths and filenames of any extra files to be attached to e-mails sent via this form. The file path and file name can include system variables and wildcards. For example, if a user with an AutoDoc username of 'PeterM' and company name 'XYZ Electrical' enters a file path as: <pre>C:\Documents and Settings\%username%\My Documents\%company%\specials.*</pre> ...this would result in all files with a filename 'specials' (regardless of what file extension they have, since a wildcard has been used) which reside in the folder C:\Documents and Settings\PeterM\My Documents\XYZ Electrical\, being included as an attachment in the e-mail.
<i>Language tabs</i>	Use these tabs to open the 'sub-forms' within the current form, or to change the default language. See page 72 for more detail on the language tabs.
<i>Send mail using User profile</i>	Use this drop-down list to specify which AutoDoc user profile should be used to send the e-mail. The user profile determines what name and e-mail address is used to represent the sender of the e-mail. For example, if the DEFAULT USER profile is used to send e-mails, when the recipient receives the e-mail, the sender will be listed as the full name associated with the Default User (as specified in the Users tab). The user profile also determines what information is used to populate any of the user-based system variables which you elect to use in the e-mail. For example, if your e-mail subject includes the variable

%department%, AutoDoc will check the *Send mail using User profile* field to find which user's department information (as specified in the Users tab) should be used.

In addition to all users created in the Users tab, the following possible *Send mail using User profile* entries exist in the drop-down list:

- 'CREATOR/OWNER' - specifies that the profile (as defined in the Users tab) for the user who sent the print job to AutoDoc will be used to send e-mails. This is the default setting. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.
- DEFAULT USER - specifies that the profile of the Default User (as specified in the Users page) will be used to send e-mails.

Override address

E-Mail

This drop-down list is usually used for testing purposes only.

If an override is defined, the e-mail will not be sent to the e-mail address(es) specified in the source document, but rather to the e-mail address of the user specified in the *Override E-Mail address* field.

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

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

- 'NO OVERRIDE' - specifies that an override will not be applied, and e-mails will be sent to the addresses specified in the document. This is the default setting.
 - 'CREATOR/OWNER' - specifies that the recipient address(es) as specified in the document will be overruled by that specified for the user (as defined in the Users tab) who sent the print job to AutoDoc. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the e-mail.
 - DEFAULT USER - specifies that the recipient address(es) as specified in the document will be overruled by that specified for the Default User (as defined in the Users tab).
-

Fax

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

The fields in the Fax page are used to define a 'template' of fax settings for the form in question. The AutoDoc Fax page fields store the information that normally you would manually enter for each new fax, to allow a seamless, automated delivery of the fax with no user input required.

Fax Form # **1** Description: Enter form name here... Save Changes

Cover page file
Company field
Attn field
Subject

Cover page text

If you want to enter text in this Cover page text field you will first have to enter a valid "Cover page file" in the field above

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

Send fax using User profile: CREATOR/OWNER
Override fax number with fax number of User: NO OVERRULE
Billing Code:
Send fax:
Now
Specific time..... 23:59
Discount period
Cover Page Designer

Note that the Fax page can work in tandem with an optional fax cover page defined with your fax service. This allows you to specify the exact placement of text and images in a cover page. For example, the *Cover page text* field defines the text that will populate the 'Note' field of a Microsoft Fax cover page. You can therefore use the Microsoft Fax cover page designer to move the 'Note' field to where you would like the text to be placed. Similarly, the AutoDoc Fax page *Subject* text field populates the Microsoft Fax 'Subject' field and can also optionally be placed in a cover page (see Figure 14).

For information on creating a fax cover page or adding fields to an existing fax cover page, please consult your fax service's help file. Note that the 'paper' for

the first page of a fax (as specified in AutoDoc's Paper page) only applies to the first page of the faxed source document, not to the cover page - if you require a letterhead or logo on the cover page, you can use your fax service's cover page designer to achieve this.

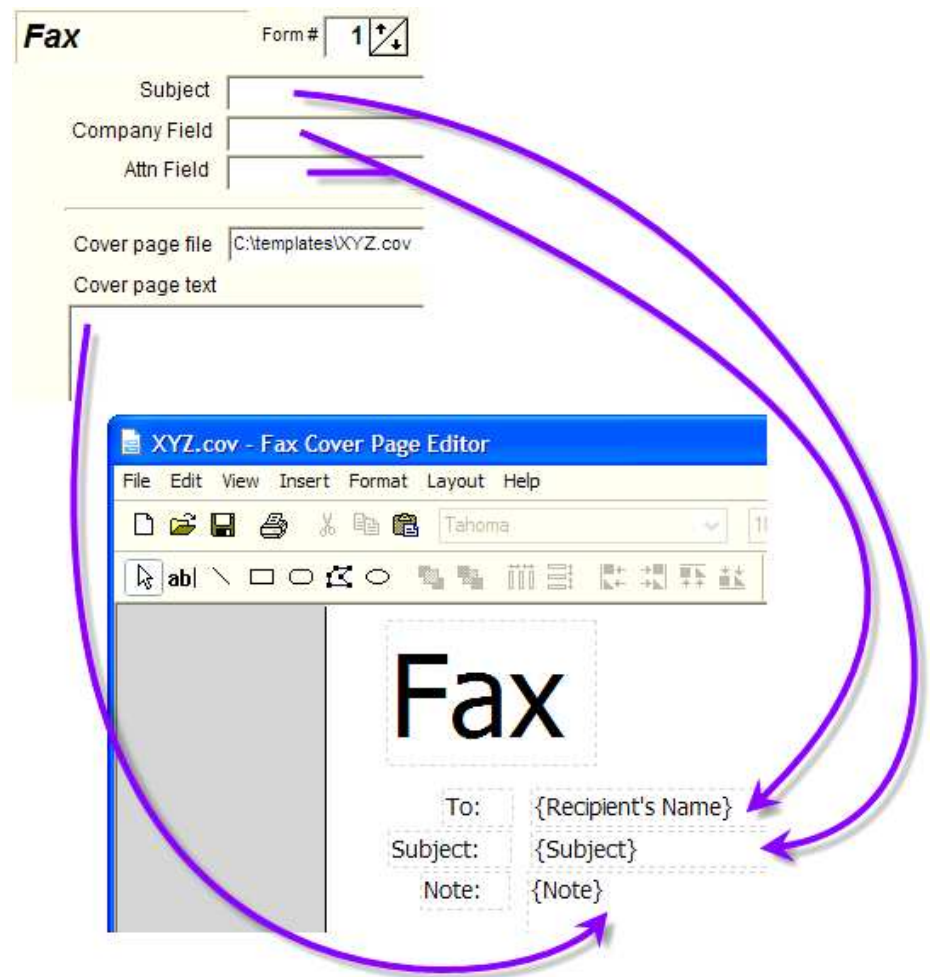


FIGURE 14 - The relationship between AutoDoc's fax tab fields, and the fields on a Microsoft Fax cover page.

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

Field Name	Field Description
<i>Form #</i>	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99.

	The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>Cover page file</i>	Use this text field to enter, optionally, the location and filename of a fax cover page to be used with this form's fax settings. The file path and filename can be entered directly into the field, or by using the browse button at the right of the field. If entering text directly, enclose the entered text with inverted commas, as in the following example: "C:\templates\faxes\fax cover.cov" Please note the important information about file paths on page 36. Note that the <i>Cover page text</i> field is disabled unless a cover page file has been selected.
<i>Company Field</i>	Use this field to specify, optionally, the recipient's company name. This field can be used together with a fax cover page - for example, in the case of Microsoft Fax, the AutoDoc <i>Company Field</i> and <i>Attn Field</i> are merged to populate the fax service's 'To' field. All the AutoDoc variables can be used in this field. For example, you could enter the company as: %accname% ...where %accname% is a user-defined variable (as defined in the Variables tab). Printing an invoice to an AutoDoc printer could then result in a fax with the recipient listed as 'ABC Automotive', as well as the name specified in AutoDoc's <i>Attn Field</i> text field.

<i>Attn field</i>	Use this field to specify, optionally, an individual recipient's name. This field can be used together with a fax cover page - for example, in the case of Microsoft Fax, the <i>AutoDoc Company Field</i> and <i>Attn Field</i> are merged to populate the fax service's 'To' field. All the AutoDoc variables can be used in this field. For example, you could enter the company as '%accname%', and the individual recipient's name as '%acctcontact%', where %accname% and %acctcontact% are user-defined variables (as defined in the Variables tab). Printing an invoice to an AutoDoc printer could then result in a fax with the recipient listed as 'ABC Automotive Attn. Joan Simpson'.
<i>Subject</i>	Use this text field to specify, optionally, the text that will be used as the fax's subject heading. All the AutoDoc variables can be used in this field. For example, you could enter the subject as: <pre>%doctype% for account %accnumber% from %company%.</pre> ...where %doctype% and %accnumber% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting application to an AutoDoc printer could then result in a fax with the subject heading 'Tax Invoice for account 34456 from XYZ Electrical Company.' For a complete list of the pre-defined variables available, see the section entitled Pre-defined System Variables on page 25 or, alternatively, activate this field's tool tip by letting the mouse pointer hover over the field for a second or two.
<i>Cover page text</i>	Use this field to enter the main body of text that will appear on the fax's cover page. For example, in the case of Microsoft Fax, the text entered here will populate the cover page's 'Note' field. This field is only available if a cover page has been specified in AutoDoc's <i>Cover page file</i> field. All the AutoDoc variables can be used in this field. For example, you could enter the cover page text as: <pre>Please find following your %doctype% of %docdate%. If you have any queries, please don't hesitate to contact me on %officephone%. Kind Regards, %fullname%.</pre> ...where %acctcontact%, %doctype% and %docdate% are user-defined variables (as defined in the Variables tab). Printing an invoice from an accounting

	application to an AutoDoc printer could then result in an e-mail with the text: ‘Please find following your Tax Invoice of 30/04/2005. If you have any queries, please don’t hesitate to contact me on 1234 5678. Kind Regards, Peter McKenzie.’ For a complete list of the pre-defined variables available, see the section entitled Pre-defined System Variables on page 25 or, alternatively, activate this field’s tool tip by letting the mouse pointer hover over the field for a second or two.
<i>Language tabs</i>	Use these tabs to open the ‘sub-forms’ within the current form, or to change the default language. See page 72 for more detail on the language tabs.
<i>Send fax using User profile</i>	Use this drop-down list to specify which AutoDoc user profile should be used to send the fax. The user profile determines what information is used to populate any of the user-based system variables which you elect to use in the fax. For example, if your fax cover page text includes the variable %department%, AutoDoc will check the <i>Send fax using User profile</i> field to find which user’s department information (as specified in the Users tab) should be used. In addition to all users created in the Users tab, the following possible <i>Send fax using User profile</i> entries exist in the drop-down list: ▪ ‘CREATOR/OWNER’ - specifies that the profile (as defined in the Users tab) for the user who sent the print job to AutoDoc will be used to send faxes. This is the default setting. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the fax. ▪ DEFAULT USER - specifies that the profile of the Default User (as specified in the Users page) will be used to send faxes.
<i>Override fax number with fax number of User</i>	This drop-down list is usually used for testing purposes only. If an override is defined, the fax will not be sent to the fax number(s) specified in the source document, but rather to the fax number of the user specified in the <i>Override Fax number with fax number of User</i> field.

	In addition to all users created in the Users tab, the following possible entries exist in the drop-down list: ▪ 'NO OVERRULE' - specifies that an overrule will not be applied, and faxes will be sent to the number(s) specified in the document. This is the default setting. ▪ 'CREATOR/OWNER' - specifies that the recipient fax number(s) as specified in the document will be overruled by that specified for the user (as defined in the Users tab) who sent the print job to AutoDoc. Note that if the user who sent the print job is not defined as a user in the Users tab, the Default User will be treated as the CREATOR/OWNER for the fax. ▪ DEFAULT USER - specifies that the recipient fax number(s) as specified in the document will be overruled by that specified for the Default User (as defined in the Users tab).
<i>Billing Code</i>	Use this text field to specify, optionally, a code for faxes which will allow you to group your fax costs for accounting purposes. A code entered in AutoDoc's <i>Billing Code</i> field will populate your fax service's equivalent field in its log for faxes sent through the form in question.
<i>Send Fax</i>	Use this option button group to specify the time at which the fax should be sent. The following options are available: ▪ <i>Now</i> - specifies that the fax will be sent to your fax service with a scheduled send time equal to the job's submission time, which results in the fax service treating the job as an immediate send. ▪ <i>Specific time:</i> - specifies that the fax will be sent to your fax service with a scheduled send time as specified in the <i>Specific time:</i> text field. ▪ <i>Discount period</i> - specifies that the fax will be sent to your fax service with a scheduled send time within the discount period specified in your fax service. ▪ <i>Hold</i> - this option is only available when WinFax is the chosen fax service, and specifies that the fax will be held in the queue until released manually by a user.
<i>Specific time:</i>	Use this text field to enter a specific time at which faxes created through this form will be scheduled for delivery. The specific time is entered in '24-hour clock' notation, and can be from 00:00 (midnight), to

23:59.

Note that this entry refers to a time in the 24-hour period subsequent to the creation of the fax. For example, if a fax is created at 17:00, and the form specifies that it should be sent at 16:00, the fax will be scheduled for 16:00 on the next day rather than 16:00 on the day it was created.

Priority

This option button group is only available if WinFax is the chosen fax service. Use the option button group to specify what priority should be assigned to faxes created under this form. WinFax considers priority when delivering faxes (please see the WinFax documentation for further information).

Resolution

This option button group is only available if WinFax is the chosen fax service. Use the option button group to specify what resolution should be applied to faxes created under this form. The *Fine* resolution allows better reproduction of small text or detailed images (please see the WinFax documentation for further information).

Cover Page Designer

Use this button to launch your selected fax service's cover page designer, if you wish to design or modify a cover page 'on the fly'.

*Delete after
successful send*

This checkbox is only available if WinFax is the chosen fax service. Use this checkbox to specify that faxes should be deleted once sent successfully (please see the WinFax documentation for further information).

Archive

AutoDoc provides an archive function which saves a PDF copy of the source document to a user-defined location. Multiple file paths can be specified if there is a need to store multiple copies of the file.

The screenshot shows the 'Archive' configuration window in AutoDoc. The window has a menu bar with options: Log, Installation, Users, Translations, Variables, Paper, E-Mail, Fax, Archive, Print, and Help. Below the menu bar, the title 'Archive' is displayed. To the right of the title, there is a 'Form #' field with a dropdown arrow, currently showing '1', and a 'Description:' field with the placeholder text 'Enter form name here...'. A 'Save Changes' button is located to the right of the description field. The main area of the window contains several configuration options: 'PDF JPEG quality' with radio buttons for 10%, 50%, 100%, 25%, and 75% (75% is selected); 'PDF DPI' with radio buttons for 72, 288, 600, 144, 300, and 1200 (144 is selected); 'External application executable to run after PDF creation' with a text field and a browse button; 'Run mode of External Application' with radio buttons for Hidden, Minimized, and Normal (Normal is selected); a 'Full path and file-name of PDF file' text field; a 'Use letterhead in background' checkbox (checked); an 'Overwrite PDF (unchecked = Append)' checkbox (checked); and an 'External application run-time parameters' text field. At the bottom, there is an 'Archive Root (%archive%)' text field with a browse button, a '+' button, and a '-' button.

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

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

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

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



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

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

Third-Party Document Management

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

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

Field Name	Field Description
<i>Form #</i>	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99. The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to

	the displayed data.
<i>PDF Attachment JPEG Quality</i>	Use this option button group to specify the quality of any JPEG files used for graphics in the PDF version of the source document which will be archived. The JPEG quality chosen will affect the size of the PDF file. The size will be more dramatically affected by documents featuring a lot of non-textual content (for example, charts, logos, and pictures).
<i>PDF Attachment DPI</i>	Use this option button group to specify the quality of any JPEG/BMP files used for graphics in the PDF version of the source document which will be archived. The DPI (Dots Per Inch) chosen will affect the size of the PDF file. The size will be more dramatically affected by documents featuring a lot of non-textual content (for example, charts, logos, and pictures). The default value is 144 DPI.
<i>External application executable to run after PDF creation</i>	Use this field (together with the associated browse button) to optionally specify a third-party application's executable (*.EXE) file to be invoked by AutoDoc to handle additional document management tasks. Please note the important information about file paths on page 36.
<i>Run mode of External Application</i>	Use this option button group to specify whether the specified third-party application should be run in its hidden, minimised, or normal state.
<i>Full path and filename</i>	Use this text field to enter the file path and name of the PDF archive file. Please note the important information about file paths on page 36. All the AutoDoc variables can be used in this field. Any specified path and filename that does not exist will be created by AutoDoc as part of the archive process. Any variable that does not exist in a document will be ignored for the purposes of the archive path and filename. For example, you may specify an archive path and filename as: <pre>c:\clients\%accname%\correspondence\%doctype% e\s\%yyyy%mm%dd% %fullname%.pdf</pre> ...where %accname% and %doctype% are user-defined variables. Such an archive entry could result in a file name and path as follows: <pre>c:\clients\ABC Automotive\correspondence\Tax</pre>

Invoices\20050430 Peter McKenzie.pdf	
However, if the variable %accname% has not been used in the source document, the path would be constructed as: c:\clients\correspondence\Tax Invoices\20050430 Peter McKenzie.pdf Any user-based variables (such as %fullname%) are derived from the user profile (as defined on the Users tab) of the user who sent the print job to AutoDoc. If the user who queues the job is not registered as an AutoDoc user, the job is treated as being from the Default User, and that profile is used instead. For a complete list of the pre-defined variables available, see the section entitled Pre-defined System Variables on page 25 or, alternatively, activate this field's tool tip by letting the mouse pointer hover over the field for a second or two. If only a filename is specified, with no path, the file will be stored in the default location, which is the folder in which the AutoDoc application is installed.	
<i>Browse</i> 	Use this button to specify an existing file in an existing path. Please note the important information about file paths on page 36.
<i>External application run-time parameters</i>	Use this field to specify any parameters required by the specified third-party application.
<i>Use letterhead in background</i>	Use this checkbox to specify whether the 'paper' specified in the AutoDoc Paper tab should be included in the archive PDF file.
<i>Overwrite PDF</i>	This checkbox determines AutoDoc's behaviour when the archive file name and path specified already exist. In such a case, AutoDoc can either overwrite the existing file, or append the contents of the current source document to the end of the existing PDF archive file.
Archive (%archive%)	Root Use this field to nominate a directory location which can be used as the root folder for archive functions. The location specified populates the %archive% variable. For example, if an existing folder C:\AutoDoc\Archives was specified in this field, configuring an archive path as: %archive%\%username%\invoice %date% ...would result in a PDF file with the filename "invoice" followed by a date stamp, located in a sub-folder of

	C:\AutoDoc\Archives, based on the user's AutoDoc username. Please note the important information about file paths on page 36.
+	Use this button to insert a new archive path. This allows multiple archive files to be created for the same source document.
-	Use this button to delete the current archive path (highlighted in dark grey). You will be prompted to confirm your action.

Print

The Print page provides the functionality to print documents in the usual means - that is, using your organisation's physical printers to produce a hard copy. In addition, AutoDoc provides extra functionality to achieve more flexible handling of documents than can usually be achieved from a single printer. For example, documents can be sent to multiple printers, for printing with or without your specified letterhead.

Print Routing Form # 1 Description: Enter form name here... Save Changes

Reduce printer output for E-Mailed and faxed documents
Printer to print page(s) to, if no E-Mail address and no fax number present
(from an AutoDoc Printer to a real Printer)
[Do not print using this option if there is no E-Mail address and no fax number]
☐ Use letterhead in background

Multi-drop printer output - Send a copy of the print job to multiple printers
Printer(s) to send a copy of ALL pages to
(from an AutoDoc Printer to a real Printer)
☐ [Print to User printer of CREATOR/OWNER]
☐ [Print to originating non AutoDoc printer (name without preceding "AutoDoc")]
☐ Snagit 7
☐ PrimoPDF
☐ HP LaserJet 4
☐ HP DeskJet 540 (Monochrome)
☐ HP DeskJet 540
☐ Fax
☐ EPSON Stylus C65 Series
☐ Use letterhead in background

Number of copies +/-

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

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

Field Name	Field Description
Form #	This field displays the ID number of the form for which details in each of the Variables, Paper, E-Mail, Fax,

	Archive, and Print tabs are currently recalled. Changing the <i>Form #</i> recalls the details of the associated form. The ID number can be increased or decreased using the up and down buttons associated with the field. <i>Form #</i> can be from 1 to 99. The <i>Form #</i> is used in document content to instruct AutoDoc which form's settings should be used to deliver the document. For example, if a document has the number '5' in text with RGB settings that designate a textual command, AutoDoc will apply the settings from form number 5 to that document.
<i>Form description</i>	Use this drop-down field to enter a description of the form that will make its purpose easily identifiable to you. Note that the form description entered applies to each of the Variables, Paper, E-Mail, Fax, Archive, and Print tabs, and in the case of the e-mail functionality, is also assigned as the filename of any attachments produced through the form. The drop-down list can also be used to recall the details of the selected form.
<i>Save Changes</i>	Use this button to save the changes made to all tabs within the AutoDoc console. Note that this button is only available if an unsaved change has been made to the displayed data.
<i>Printer to print page(s) to, if no E-Mail address and no fax number present</i>	Use this drop-down list to specify, optionally, a printer to which print jobs will be directed if no fax number or e-mail address (or a translation representing such a command) exists. Note that this test is applied on a page-by-page basis - that is, if a printer is selected here, any pages in the source document that do not include a textual command e-mail address or fax number will be sent to this printer. The available options in the drop-down list include all the installed printers available to AutoDoc, as well as the following options: ▪ [Do not print using this option if there is no e-mail address and no fax number] - specifies that pages without an e-mail address and fax number will not be printed under this option. ▪ [Print to User printer of CREATOR/OWNER] - specifies that pages without an e-mail address or fax number will be sent to the printer associated with the user who sent the print job to AutoDoc. This association is defined in the Users tab, using the <i>User Printer</i> drop-down list. If the user who queues the job is not registered as an AutoDoc user, the job is treated as being from the Default User, and in

	this case that profile is used to determine the 'User printer' to be used. ▪ [Print to originating non AutoDoc printer (name without preceding "AutoDoc")] - specifies that pages without an e-mail address or fax number will be sent to the printer of which the AutoDoc printer is a copy. For example, if the print job is sent to the printer 'AutoDoc HP LaserJet 4', under this option the pages that are not e-mailed or faxed will be printed by the HP LaserJet 4.
<i>Use letterhead in background</i>	Use this checkbox to specify whether the 'paper' specified in the AutoDoc Paper tab should be included in the exception-based printouts.
<i>Printer to send a copy of ALL pages to</i>	Use this checklist to specify, optionally, the printer(s) on which a copy of the entire print job will be printed, regardless of any other AutoDoc delivery method settings. The available options in the checklist include all the installed printers available to AutoDoc, as well as the following options: ▪ [Print to User printer of CREATOR/OWNER] - specifies that all pages in the print job will be sent to the printer associated with the user who sent the print job to AutoDoc. This association is defined in the Users tab, using the <i>User Printer</i> drop-down list. If the user who queues the job is not registered as an AutoDoc user, the job is treated as being from the Default User, and in this case that profile is used to determine the 'User printer' to be used. ▪ [Print to originating non AutoDoc printer (name without preceding "AutoDoc")] - specifies that all pages in the print job will be sent to the printer of which the AutoDoc printer is a copy. For example, if the print job is sent to the printer 'AutoDoc HP LaserJet 4', under this option all pages in the print job will be printed by the HP LaserJet 4.
<i>Use letterhead in background</i>	Use this checkbox to specify whether the 'paper' specified in the AutoDoc Paper tab should be included in the multi-drop printouts.
<i>Number of copies +/-</i>	In a future AutoDoc release, these buttons may provide a means of specifying the number of copies of a print job to be applied.

Document Content Configuration

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

This chapter covers the following broad topics:

- What does AutoDoc look for?
- Processing Rules
- Recommendations
- Notes on AutoDoc's Environment

What Does AutoDoc Look for?

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

Delivery Method Commands

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

- Textual commands that are one or two numerical characters (for example, 2, 02, or 95), are recognised as representing an AutoDoc form number. Since archive and hard copy delivery instructions are configured within the AutoDoc console only, the form number specified in a document determines whether these delivery methods will be applied to the document.
- Textual commands that are three or more characters in length, and are all numeric, or a combination of numeric and blank spaces (for example, 03 12345678 or 7 3), are recognised as fax numbers to which the document should be sent. Numbers with brackets are also recognised (for example, (03) 12345678), as are forward slashes (for example, 03/12345678).
- Textual commands that are in the format of a valid e-mail address are recognised as e-mail addresses to which the document should be sent.

Content & Timing Commands

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

- Textual commands that are an existing local filename and path (for example, c:\marketing\product overviews\autodoc.pdf) are recognised as a file that will be attached to e-mails produced by AutoDoc.
- Textual commands that are two capital letters that match an abbreviation on a language tab in the Fax and E-Mail tabs (for example, FR), are recognised as a language, and the corresponding language's 'sub-form' will be applied.
- Textual commands in the format of 'hh:mm:ss' schedule the fax to be sent at this specific, fixed time on the date of submission. For example, 05:06:07 would result in the fax being scheduled for seven seconds after 5:06 a.m. on the date of submission. Values between 00:00:00 (which specifies that the fax will be sent at midnight) and 23:59:59 are acceptable for fixed-time scheduling. Note that the form-based *Specific time* setting refers to a time in the 24 hours after the submission, whereas the document-based fixed time refers to the current date. For example, a document submitted at 4 p.m. on March 20th with a form-based *Specific time* of 2 a.m., will be sent at 2 a.m. on the 21st. In

contrast, if 02:00:00 was specified in the document content, the fax would be scheduled for 2 a.m. on the 20th and would therefore be subject to an immediate send attempt. Note that this command will only override form-based settings if the form is set with the *Specific time* option button, or if the form is set to send *Now* and the document includes **both** a time command **and** a date command (as per the next point).

- Textual commands in the format of 'dd/mm/yy' schedule the fax to be sent on the specified date. Note that the 'dd/mm/yy' format is an example only - the actual format required is determined by the Windows regional settings date format (as defined via the 'Control Panel') on the PC on which AutoDoc is installed. This command will override form-based settings if the form is set with either the *Now* or *Specific time* option buttons.
- Textual commands in the format of '+hh:mm:ss' (note the additional '+' prefix) schedules the fax to be sent at the specified time *relative* to submission time. For example, a fax submitted at 1 p.m. with +05:06:07 specified, would result in the fax being scheduled for 7 seconds after 6:06 p.m. Values between +00:00:00 (which specifies that the fax will be sent immediately) and +23:59:59 are acceptable for relative scheduling. This command will override form-based settings if the form is set with either the *Now* or *Specific time* option buttons.



Note that textual commands are assessed on a page-by-page basis. Fax numbers and e-mail addresses must appear *on each page of the document to which they apply*. For example, if an individual page does not feature a fax number, it will not be included in the fax. The equivalent is true for e-mail addresses. Please see the following Processing Rules section for details on how AutoDoc interprets textual commands in a multiple-page document.

Processing Rules

By the very nature of AutoDoc functioning as a virtual printer which receives input from a potentially unlimited number of third-party applications, it is problematic to define the limits of the functionality that may be required of the AutoDoc system. For example, it is not impossible for AutoDoc to encounter a document which has 20 textual command e-mail addresses in the first page, and another, different, 20 e-mail addresses in the next, as well as 20 textual command fax numbers.

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

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

Processing Multiple Textual Commands

E-mail addresses, fax numbers, form numbers, fax scheduling commands, file attachment commands, and language commands, are processed as follows:

1. If pages do not have a form number, the default form (as specified in the virtual printer's properties) will be used.
2. Whenever a form number is encountered in a document, that form number will apply to all subsequent pages in a document, unless another form number is found. This rule overrides rule 1 above - for example, if the first three pages have no form number, the fourth has form 2, and the remainder of the pages have no form number, the default form will be applied to the first three pages, and form 2 will be applied to the remainder of the document. If page 5 were to have form 6, the default form would apply to pages 1-3, form 2 to page 3-4, and form 6 to pages 5 onwards.
3. E-mail addresses, fax numbers, file attachment commands, and fax timing commands, are assessed as follows:
 - a. Any pages with multiple e-mail addresses will be split into multiple outputs: one e-mail per e-mail address.
 - b. If multiple pages include the same e-mail address, these will be merged into one output and e-mailed to that address.
 - c. Rule 3b does not apply if the pages are processed under different form numbers. In this case, an e-mail will be produced for each form for which that address occurs.
 - d. Fax numbers will be treated in an identical manner as e-mail addresses as per the above points.
 - e. A fax timing command will only apply if it appears with the first occurrence of a fax number, and will then apply to all subsequent pages featuring the fax number(s) with which it occurs. Any subsequent, different, timing command for that fax number will be ignored for the purpose of that number.
 - f. File attachment commands are associated only with any e-mail addresses that occur on the page on which the file attachment command also occurs. If more than one file attachment command occurs for an e-mail address (either on one page or on different pages), all of the files will be attached to the resultant e-mail(s).
4. Language commands are processed as follows:
 - a. If multiple pages are sent to the one fax number or email address, the last language to be used in that group of pages, is applied to all pages.
 - b. Not specifying a language results in the default language being applied.

- c. Specifying more than one language per page results in the last language on that page being applied.
5. Archive files are created according to the form number associated with the pages within a document. If a document has 5 pages, the first 2 processed under form 1, the remainder under form 2, the only first 2 pages will be archived to the file location(s) specified in form 1 (if any), and only the last three will be archived to the location(s) specified in form 2 (if any).
 6. A page which features a textual command form number, and also a textual translation which represents a form number, will be processed by the translated form number. That is, translated form numbers override textual command form numbers. This is also the case where a language command occurs as a textual command and a translation. For all other translation types, where a translation occurs together with an existing textual command, the translation is treated as though it is simply an additional textual command, following the rules specified above for multiple textual commands.

Processing Multiple User-Defined Variables

User defined variables are processed as follows:

1. If different text strings on the same page all have RGB settings which represent a user defined variable, the strings are joined into one string which populates the variable. For example, if a text string 'Statement', with RGB values 1,1,1 appears in the header of a page, and a text string 'ABC Automotive' with RGB 1,1,1 appears in the body of the document, if variable 1 is defined as RGB 1,1,1, variable 1 will be populated as 'StatementABCAutomotive'. If the first string was 'Statement ' (with a trailing space), the resultant variable value would be 'Statement ABC Automotive'.
2. Where pages are processed under different form numbers, a different set of variables is maintained for each form. For example, page 1 has form 1 and accounts@abcautos.com, and variable 1 RGB 1,1,1 text 'Tax Invoice'. Page 2 has form 2, accounts@abcautos.com, and variable 1 RGB 1,1,1 text 'Receipt'. Two separate e-mails will be sent to accounts@abcautos, the first where variable 1 is 'Tax Invoice', the second where variable 1 is 'Receipt'.

Where pages are processed under the same form number, the following rules apply:

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

mail address accounts@abcautos.com, and may have the different value 'Kleeneesy' for the e-mail address info@kleeneesy.com.

4. The first instance of a user-defined variable within a page will be associated with all e-mail addresses which appear on that page, for the remainder of the print job. If variable 1 is RGB 1,1,1 'ABC Automotive' on page 5, and page 5 also features the address accounts@abcautos.com, variable 1 will be 'ABC Automotive' for this e-mail address for the remainder of the document, regardless of whether a different text string with RGB 1,1,1 is found on later pages.
5. If any e-mail addresses appearing on a page already have that user-defined variable populated from an earlier page, this instance of the user-defined variable will be ignored for these e-mail addresses only. Any other e-mail addresses on the page, for which the user-defined variable has not yet been populated, will be associated with this new instance of the variable. Consider: page 5 features variable 1 RGB 1,1,1 'ABC Automotive' with e-mail address accounts@abcautos.com, and page 6 features RGB 1,1,1 'DEF Supplies' with two e-mail addresses on the page (accounts@abcautos.com and defsupsupplies@host.com). In this case, variable 1 is 'DEF Supplies' for defsupsupplies@host.com, but remains 'ABC Automotive' for accounts@abcautos.com.
6. An instance of a user-defined variable that occurs on a page with no e-mail address will be ignored for the purpose of e-mails.
7. Fax numbers with multiple variables will be treated in an identical manner as e-mail addresses as per the above points.
8. The archive function will recognise each instance of each user defined variable encountered. For example, consider an archive path of C:\archive\%accname%.pdf, where "%accname%" is user defined variable 1, defined as RGB 1,1,1. If page 1 features the text 'ABC Automotive' in RGB 1,1,1, and page 2 features the text 'DEF Services' in RGB 1,1,1, two archive files will be created: C:\archive\ABC Automotive.pdf and C:\archive\DEF Services.pdf. If page 1 and page 2 both featured 'ABC Automotive' in RGB 1,1,1, only the one archive file would be created.

Recommendations



Because of the specific nature of AutoDoc's document content tests, it is important that documents are configured strictly in line with the criteria used in these tests, to ensure you achieve the desired output. Also, as with any new component added to your IT setup, ensure you test your configurations with output contained within your organisation's environment before moving to a 'live' environment, where AutoDoc delivers documents externally.

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

- Wherever possible, add AutoDoc commands to a document in a 'templated' fashion. Many reporting and word-processing applications allow text and database fields to be added to pre-defined reports so

that, for example, any Tax Invoice produced from that report has standard layout and content. In such a pre-defined report, a field for the recipient's e-mail address could be added as, for example, a white text field.

- Because fax numbers and e-mail addresses need to be added to each individual page of a document to which they apply, documents in which all pages are to be sent to the same fax number(s) and/or e-mail address(es) can be conveniently configured by adding this information to headers or footers. This ensures the same information is consistently applied to all pages of the document.
- Ensure that the form number, language, each e-mail address, and each fax number are located on individual lines in a document or report field, to ensure you are not giving AutoDoc an instruction which you did not intend. Alternatively, you can separate fields by inserting tabs. For example, specifying the use of form 2 (as '02') on the same line as fax number '1234 5678' can result in a fax being sent to 0212345678. Such a case is usually limited to text editors/word processors where it would be 'logical' to enter a single string containing more than one of the three document commands. In the case of pre-defined reports or forms which usually feature discrete fields for different information, use a different font, font style, or font size, to ensure different textual commands on the same page are not merged.
- Ensure that e-mail addresses are not converted to hyperlinks. Some applications will automatically recognise a valid e-mail address and convert it to a hyperlink, which usually results in the text colour changing. This in turn may result in the text not being recognised as an AutoDoc command.
- If international dialling is required for faxes, ensure the fax number does not include the '+' prefix, but rather the full international codes as they would be dialled on a telephone keypad. AutoDoc is capable of incorporating the '+' prefix into a number, but your fax client may not process it correctly.
- Remember that if a document is printed to an AutoDoc printer, and a form number has not been specified on the document's pages, the settings of the default form specified in the virtual printer's properties ('comments') may be applied to any such pages, regardless of whether any textual commands exist in these pages or not.

Notes on AutoDoc's Environment

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

Unfortunately these physical problems are only one component of a printer's complexities, and upon consideration of the massive variety of jobs a printer can be required to handle (and indeed the massive complexity involved in the process of converting on-screen data to a faithfully reproduced hard copy), it

should not be surprising that the data-handling elements of printers and, equally importantly, the applications that print to them, are also prone to anomalies.

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

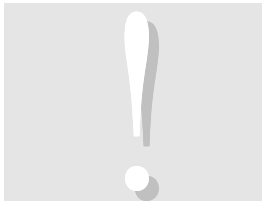
Figure 15 - Two sections of a 'spool' file, created to pass on-screen data to a language that can be interpreted by a printer, allowing it to faithfully reproduce the document in hard copy. The fax number '62123456' is 'hiding' (in sections) somewhere in here!

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

Notes on Third-Party Applications

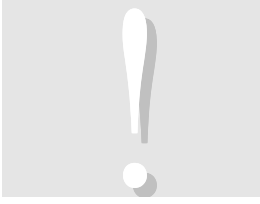
This section provides recommendations for using AutoDoc with some common applications.

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



Please also note that if your version of Clarity reports does not support the provision of colour information to a monochrome printer, and you are using an AutoDoc printer which is a copy of a monochrome printer, you will not be able to make use of the 20 user-defined variables, or RGB-based translations. This is due to these versions of Clarity not passing the necessary RGB colour data to monochrome printers, which makes AutoDoc unable to identify the text which should populate these variables. To overcome this limitation, you can elect to specify a colour printer substitute when installing AutoDoc printers (see pages 29 and 16 for more information).

- When using Microsoft Word, enter AutoDoc commands/variables on separate lines, or separated by tabs. We recommend this approach to ensure two separate 'strings' of text (such as a fax number of '12345678' and a form number of '9') are not merged into one string (such as the resultant fax number of '123456789' with no form number).
- When using Microsoft Excel, be aware that this application has a limited number of font colours available per workbook. Unlike Word, where all the RGB colours are available in any document, Excel stores a palette of available colours per workbook. The number of available colours exceeds the number of user-defined variables AutoDoc uses, but be aware that because Excel workbooks have a limited palette, if you customise a palette colour that has already been used in the workbook, the earlier occurrence of the colour will also change to the new, customised colour.



Please note that Microsoft Excel does not support the provision of colour information to a monochrome printer, so if you are using an AutoDoc printer which is a copy of a monochrome printer, you will not be able to make use of the 20 user-defined variables, or RGB-based translations. This is due to these versions of Excel not passing the necessary RGB colour data to monochrome printers, which makes AutoDoc unable to identify the text which should populate these variables. To overcome this limitation, you can elect to specify a colour printer substitute when installing AutoDoc printers (see pages 29 and 16 for more information).

Printing and Troubleshooting

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

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

- Printing
- Troubleshooting

Printing

Upon installing the AutoDoc application and the AutoDoc printer driver(s) as per the instructions in the Installation chapter, an AutoDoc virtual printer will exist for each of the real printers you elected to replicate.

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

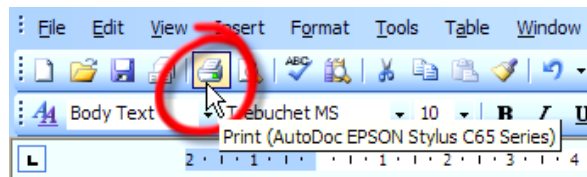


FIGURE 16 - Printing to AutoDoc using a toolbar 'Print' button.

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

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



FIGURE 17 - Selecting an AutoDoc printer from the list of installed printers, in this case, in Microsoft Word.

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

Your organisation's administrator should make a regular check of the log to identify any delivery failures caused by configuration problems, and each user should also track their own deliveries using the User Log (see the sections starting on pages 112 and 116 for more details on using the AutoDoc log).

Troubleshooting

This section outlines some problems you may encounter when using the AutoDoc system.

Errors

The following circumstances will result in document delivery errors:

- Incorrect or blank SMTP server/port when e-mailing
- SMTP server unavailable when e-mailing
- User e-mail address not recognised as valid by SMTP host
- Nominated fax service not installed when faxing
- Incorrect fax machine name (for Microsoft Fax) when faxing
- Specified file paths being unavailable to AutoDoc at the time of processing (this can include mapped drives which may differ under different user logins).
- Archive file open by another user when AutoDoc tries to access it (AutoDoc will pause, and resume when the file is closed).

No Apparent Output

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

- Double-check that you are directing the print job to an AutoDoc printer rather than a physical printer.
- Has your print job been placed in a long queue? A long queue on an AutoDoc printer can be indicative of an error in an earlier print job.
- Under the Personal Edition of AutoDoc, if the AutoDoc virtual printer is set as a shared printer (as a result of replicating a shared printer), print jobs will not be processed. In this case, set your real printer to not be shared, and reinstall the AutoDoc replication of this printer (using the *(Re)Install AutoDoc Printers* button on AutoDoc's Installation tab).

- Try printing one of the supplied samples (accessible via AutoDoc's Help/Licence tab) to isolate whether the problem is with your document's content.
- Does document content actually warrant AutoDoc output? For example, are there any textual commands (form number, e-mail address, and fax number) in the document matching the RGB settings specified in AutoDoc's Installation tab?
- If coloured textual commands are not working as expected, and you are using a monochrome printer, you may need to specify a substitute colour printer with which to override your monochrome printer's settings. See the section on AutoDoc Printers on page 28, and the Notes on Third-Party Application on page 104.
- Check that your document content is in line with the Recommendations set out on page 102.

Unexpected Output

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

- Use the following chapter on the log details to identify any information that may provide clues as to the cause of the problem.
- Has a form number been specified in the document? If not, remember settings from the default form specified in the virtual printer's properties will be applied by default.
- Check the Processing Rules on page 99 if you are unsure about how, for example, AutoDoc processes a multi-page document with a number of different textual commands and variables. Also, consider the Recommendations set out on page 102, and the Notes on Third-Party Application on page 104.
- If user-defined variables and coloured textual commands are not working as expected, and you are using a monochrome printer, you may need to specify a substitute colour printer with which to override your monochrome printer's settings. See the section on AutoDoc Printers on page 28, and the Notes on Third-Party Application on page 104.
- Is the user who sent the print job defined as an AutoDoc user? If not, the Default User profile will be used to create the print job.
- If you are using translations, ensure that they are correctly defined (see the two sections on Translations, starting on pages 24 and 56 respectively). You may need to experiment with more simple translations and their output, before defining complex translations.
- If the problem you are experiencing is related to a specific file (for example, a letterhead not being included, a file not being attached to an e-mail, or an archive file not being created/appended), check that the

file locations you have specified are correct. See also the section on File Locations and References on page 36.

If All Else Fails...

Please contact ID Data via www.iddata.nl, with as much detail on the problem as you are able to provide. The Installation | Trace tab provides the means to contact the ID Data support department by supplying the AutoDoc Trace Log and a backup of your configuration (see the control descriptions on page 48 for details on activating Tracing and contacting support).

Using the Log & System Files

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

This chapter details the functionality of the AutoDoc log and each of the AutoDoc system files, as well as a discussion of the options available for their creation and storage:

- The AutoDoc Log
- User AutoDoc Logs
- System Files

The AutoDoc Log

The AutoDoc log lists every document sent to AutoDoc for which AutoDoc has attempted to produce output (e-mailed, faxed, archived, or printed). Documents which have been sent to AutoDoc but do not trigger any output, are not included in the log.

For example, if a 'normal' document (without textual commands) were accidentally printed to an AutoDoc printer instead of an internal laser printer, it would not be faxed or e-mailed. However, since the document also does not include a form number, AutoDoc's default form (as specified in the virtual printer's properties) would be applied by default. If an archive path or print routing action is specified in the default form, AutoDoc would produce output for this document, and it would thus appear in the log. If no archive or print routing action is specified in the default form, AutoDoc would do nothing with the print job, and nothing would be displayed in the log.

The log is also a vital tool for troubleshooting purposes, and your organisation's administrator should make a regular check of the log to identify any delivery failures.

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

- A unique e-mail address
- A unique fax number
- A unique archive filename/path
- A unique printer driver (for print routing)
- A unique print routing method (that is, 'exception' printing or multi-drop printing).

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

- Three pages to be e-mailed to the same address, and one of these pages to also be e-mailed to a different address
- Two of the three e-mailed pages also to be faxed to one fax number, and one of these pages to be faxed to a different number
- Archiving to two file paths
- Exception printing set to print to a HP LaserJet
- Multi-drop printing set to print to the same HP LaserJet and a Canon Laser
- One page with no e-mail address or fax number.

The following nine records would be entered in the log:

- One record for each of the two e-mail addresses (that is, two records)
- One record for each of the two fax numbers (that is, two records)
- Two archive records
- One record for the one page that has no e-mail address or fax number and is therefore printed to the HP LaserJet on an exception basis
- One record for each of the multi-drop printers (that is, two records).

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

By default, the log records are sorted in entry order. However, clicking on a column heading rearranges the entries so they are sorted based on the values in that column. In addition, any record in the log which has stored content associated (that is, a PDF archive file, and faxes and e-mails if you have elected to store copies of these documents via the AutoDoc Installation tab) provides a link to that stored content. Double-click on the log record to launch the stored content (for example, double-clicking on an archive record will open the PDF file for viewing).



The log also features very useful tool tip functionality - let the mouse pointer hover over a record for a second or two to retrieve all the log information for that record, without having to scroll across.

The following table provides detail for each of the fields in the Log tab:

Field Name	Field Description
✓	This column displays the nature of the record, via an icon:  = a fax sent to Microsoft Fax  = a fax that could not be sent to Microsoft Fax  = a fax sent to Symantec WinFax  = a fax that could not be sent to WinFax  = an e-mail sent to the SMTP host  = an e-mail which has failed to send. Note that e-mails which have failed can be resent by double-clicking on the log record (provided you have elected to save copies of e-mails - see the discussion on saved data on page 119).  = an archived PDF file  = a job redirected to a non-AutoDoc printer  = a general error. Clicking on the ✓ column heading results in the log being sorted in its default sort order. Where errors are reported, more detail is available in the <i>Status</i>

	column.
<i>Date/Time</i>	This column displays the date/time stamp applicable to the document delivery job.
<i>E-Mail / Fax number / Path</i>	This column displays one of the following destinations applicable to the delivery: ▪ The recipient e-mail address (for an e-mail) ▪ The recipient fax number (for a fax) ▪ The file path (for an archive operation) ▪ The printer name (for a print job).
<i># Pages</i>	This column displays the number of pages in the delivery. Note that only the pages of a document that have been handled by AutoDoc are included in this tally (which may vary from the total number of pages in the document). In the case of an archive operation, this field lists the number of pages in the resultant PDF file. If your archive file is configured to be appended to, rather than overwritten, the <i>Pages</i> field will show the total number of pages in the file after the archive operation, not just the number of pages appended.
<i>Subject</i>	This column displays one of the following: ▪ The subject heading as featured in a fax or e-mail ▪ Originating application and document filename (in the case of an archive operation) ▪ Originating application and document filename, all prefixed by 'Redirect', in the case of a print job configured in the 'Multi Drop' area of AutoDoc's Print tab. ▪ Originating application and document filename, all prefixed by 'No Fax/E-mail', in the case of a print job configured in the 'Reduce Printer Output' area of AutoDoc's Print tab.
<i>Attn</i>	This column displays the name of the recipient to whom a fax is directed for attention. This corresponds to the value specified in the <i>Attn Field</i> text field in AutoDoc's Fax tab.
<i>Status</i>	This column displays the progress of the delivery. Completed AutoDoc jobs are specified via one of the following: ▪ Completed (for an archive operation)

	▪ Sent (for a print job) ▪ Sent to <fax client> (for a fax job) ▪ Sent to Mail Client (for an e-mail job) Information about the cause of a logged error is also displayed in the <i>Status</i> column.
<i>Computer Name</i>	This column displays the name of the PC which sent the print job to AutoDoc (as defined in the workstation's property settings).
<i>Creator/Owner</i>	This column displays the AutoDoc user associated with the print job. Note that a 'DEFAULT USER' entry may mean that the job was received from a Windows username which has not been defined as an AutoDoc user.
<i>Form #</i>	This column displays the number of the form under which the AutoDoc job was processed.
<i>Job ID</i>	This column displays the Windows print job number associated with the record. All records which result from the one print job have the same Job ID.
<i># E-mails</i> <i># Faxes</i> <i># Archives</i> <i># Prints</i> <i># Errors</i>	These fields display the number of records displayed in the log for each delivery method (as well as any errors logged).
<i>Retry</i>	This button executes an attempt to resend failed e-mails on a batch basis.
<i>Trace On</i> 	This flashing icon indicates that tracing has been activated (through the Installation Trace tab).
<i>Clear Log</i>	This button clears all records from the log. You will be prompted to confirm your choice, and given the opportunity to save a copy of the current log (see the section on Temp files on page 121 for more information on log files).

AutoDoc User Logs

In addition to the main AutoDoc log, which lists every delivery processed by AutoDoc, individual users can also access an AutoDoc log which displays only the deliveries processed under their username.

Other than the restriction of this log's content to the user in question, the User Log has exactly the same content as the main AutoDoc log. Because the User Logs and main log are maintained separately, individual users can clear their own logs without affecting the content of the main log.

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

Making User Logs Accessible

Assuming AutoDoc was installed in the default location, the user log viewers are located in the following location by default:

```
C:\program files\autodoc\data\<username>\AutoDocView.exe
```

If the *Log Files* field in the Installation tab has a path specified, log viewers will reside in that location.

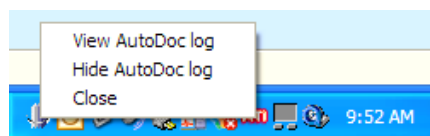
The user corresponding to the <username> folder needs to be given full control to that folder and its contents, with read/write access.

Using User Log Viewers

Once permissions have been set, individual AutoDoc users can run the AutoDocView.exe file located in their particular user folder. This launches the viewer (which is essentially a copy of the Log tab of the main AutoDoc console), and also adds an AutoDoc icon to the user's system tray.

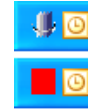


Clicking on this new icon gives view options for the User Log:



- View AutoDoc log - opens the User Log for viewing (double-clicking on the icon also opens the log)
- Hide AutoDoc log - minimises the User Log into the system tray
- Close - after prompting, closes the User Log altogether (which requires the user to run the AutoDocView.exe file again if they want to view the log).

If a delivery error occurs, the tray icon flashes between the AutoDoc icon and a red square, alerting the user to the fact that a delivery error has occurred. The flashing icon reverts to its normal state once the log has been viewed and closed.



System Files

AutoDoc's system files reside in the directory in which you elected to install the AutoDoc application. The default AutoDoc directory is `C:\Program Files\AutoDoc`.

While you need not know about the majority of system files in order to successfully use and manage the AutoDoc application, the following explanations of the content of each of AutoDoc's sub-folders are provided for your information.

The files that reside in the AutoDoc directory are:

- `AutoDoc Reference Guide.pdf` - the AutoDoc Reference Guide you are now reading.
- `autodoc.exe` - the AutoDoc application itself.
- `autodoc.ini` - contains system initialisation settings relevant to the current AutoDoc release.
- `AutoDocView.exe` - the 'master copy' of the log viewer, from which the individual User Log Viewers are copied.
- `Backup.ini` - stores information about AutoDoc's backup function, including the default file location.
- `bszip.dll` - packaged functional procedures used in the automatic internet update process.
- `cadtrays.ini` - stores information relating to printer tray settings.
- `mac.ini` - if present, stores licensing information.
- standard samples, tests, website shortcuts and icons installed with the application.
- `unins000.*` - used if the AutoDoc application is uninstalled.

The subfolders within the AutoDoc folder are depicted in Figure 18, and the content of each is detailed in the following sections.

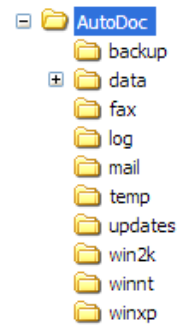


FIGURE 18 - The AutoDoc folder structure

Backup

This folder is the default location for AutoDoc backups (as performed using the *Backup* button on AutoDoc's Installation tab), which store AutoDoc's configuration settings. Note that uninstalling AutoDoc will also remove this folder and its contents.

Data

The following files reside in the Data directory:

- `cad2.ini` - stores settings for the AutoDoc console and global configuration settings (including information specified in AutoDoc's Installation tab).
- `cadcolours<form#>.txt` - store colour settings for user-defined variables, as defined in the Variables tab. `cadcolours0.txt` stores the default settings for user-defined variables.
- `cadform.ini` - stores settings as defined in the AutoDoc E-Mail, Fax, and Print tabs
- `cadpath.txt` - stores the file paths as defined in the AutoDoc Archive tab
- `cadtranslate.txt` - stores the text-to-AutoDoc Command mapping as specified in the Translations tab.
- `cadusers.txt` - stores the user profiles as defined in the AutoDoc Users tab
- `licence.ini` - stores licensing information.

These files are all backed up as part of an AutoDoc backup as performed using the *Backup* button on the Installation tab.

By default, the Data directory also includes a subfolder for each AutoDoc user. If you have elected to store copies of faxes and/or e-mails (using the *Create a copy...* checkboxes in AutoDoc's Installation tab), these are stored here (in TIF format, and in EML and/or PDF format respectively). These user folders provide the 'double-click' functionality of the AutoDoc log - if files are stored here,

double-clicking on a log record opens the associated copy stored in these user folders. Note that if the *Log Files* field in the Installation tab has a path specified, these user files will reside in the location specified, rather than in the 'Data' directory.

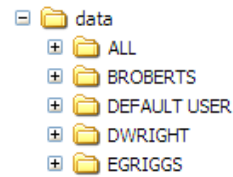


Figure 19 - The sub-folders of the 'Data' folder, which represent each of the users who have processed print jobs with AutoDoc. Note that even users who are not defined as AutoDoc users will have a folder corresponding to their Windows profile name if they have sent jobs processed by AutoDoc. The 'ALL' folder contains copies of saved documents for all users.

Note that two copies of each e-mail or fax file are stored in the user folders, since each user folder stores copies grouped by date, by e-mail address, and by fax number (see Figure 20). The filename of the copy is different for each of the three copies, due to the method by which they are stored. For example, a fax sent at 5 p.m. 'sharp' on the 11th of April 2005, to fax number 111222, from a print job sent to AutoDoc by the 'EGriggs' user, will result in two files stored as follows:

- ...\\AutoDoc\\Data\\EGRIGGS\\by date\\11-04-2005\\111222 17.00.00.tif (where '17.00.00' is the time stamp in hh.mm.ss format)
- ...\\AutoDoc\\Data\\EGRIGGS\\by fax number\\111222\\11-04-2005 17.00.00.tif

Note that in each case, exactly the same information is stored in the file path/name - only the order (and therefore the means of sorting the information) differs.

Note that in the case of e-mails, there may potentially be four copies stored for each e-mail sent, depending on whether AutoDoc is set to store copies in EML or PDF format, or both (which would store two files - an EML and a PDF - in each of the 'by e-mail' folder and the 'by date' folder).

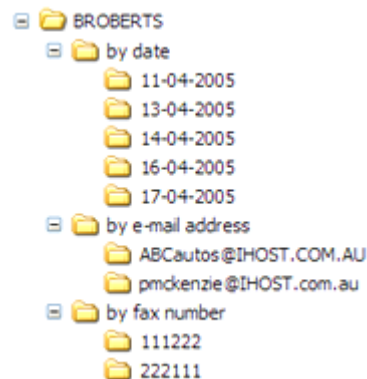
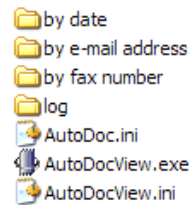


FIGURE 20 - Storage sub-folders of the User folders. Note that these folders will reside in the location specified in the *Log Files* field of AutoDoc's Installation tab, unless that field is left blank, in which case the default 'Data' location applies.

If hard disk space is an issue for your organisation, you may wish to configure AutoDoc to not store these copies (which will also result in the loss of the log's double-click functionality). As an alternative, your chosen fax service can be configured to store copies of faxes. However, AutoDoc provides the only direct means of saving a copy of e-mails it sends, as AutoDoc has its own e-mail client, which bypasses any other installed clients (such as Microsoft Outlook) and their storage mechanisms. You can, however, configure AutoDoc's forms to send CC e-mails to a nominated address when internal copies are required (see the Internal Records section on page 35 for a complete listing of AutoDoc's storage options).

As well as the document storage sub-folders within each user's folder, there is a 'log' folder and three other files:



- `log` - stores the log information relating to deliveries for this user only.
- `AutoDoc.ini` - contains system initialisation settings relevant to the current AutoDoc release.
- `AutoDocView.exe` - the AutoDoc User Log for this user. See page 116 for information on using User Logs.
- `AutoDocView.ini` - when present, contains log initialisation settings.

Fax

The fax folder stores, temporarily, files used in the creation of faxes.

Log

The log folder stores copies of log files that were saved in the process of clearing AutoDoc's log (using the *Clear Log* button).

The log currently maintained by AutoDoc (which resides in the 'temp' folder) has the filename 'cadlog.txt'. Any previously saved logs are date/time stamped as a suffix to the original filename. For example, the file bearing the name:

`cadlog 2005-04-09 09-39-55.txt`

...is a log file that was saved at 55 seconds past 9:39 on the 9th of April 2005.

Log files are created in tab-delimited text file format.

Mail

The mail folder stores, temporarily, files used in the creation of e-mails.

Temp

The temp folder stores, temporarily, printer spool data, and files ready for delivery to the relevant client/location. The temp folder is also where AutoDoc's current log file ('cadlog.txt') resides.



Note the distinction between the cadlog.txt file in the temp folder, and the cadlog.txt file in the ...\\AutoDoc\\data\\ALL\\log folder. The log file in the ALL user folder does store information about deliveries processed by AutoDoc for all users (as does the temp log), but the two files are accessed by different means and therefore maintained separately. The log file in the ALL user folder is viewed using the AutoDocView.exe User Log viewer, while the log file in the temp file is viewed through the AutoDoc configuration console itself. This means that if a user clears the ALL log file using the User Log viewer, the log as viewed through the main AutoDoc application will remain intact.

The temp folder may also store the AutoDocBusy.txt file, which is used by AutoDoc to track its own status.

Updates

The updates folder is used to store files downloaded from the internet as part of the automatic update process (using the *Check for updates* button on the Installation tab).

Win*

The 'win2k', 'winnt' and 'winxp' folders contain the Dynamic Link Library (*.DLL) files applicable to the Windows 2000, Windows NT and Windows XP operating systems respectively. These DLL files package various functional procedures used by the AutoDoc application.

Index

The index is designed to provide a quick reference to important items which are not readily identified using the table of contents alone. Section headings have therefore not been duplicated in the index, except where a particular facet of a topic has been identified as being of potential ‘quick reference’ interest.

Every data entry control of the AutoDoc application’s console is listed in the index. To locate an index entry for a data entry control, look under the ‘Controls’ main entry, and then locate the sub-entry for the control in question, by name.

Many of the examples given in this guide can also be found under the ‘examples’ entry.

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