Investintech.com Inc. PDF Server Products

Administrator Guide

covers

Absolute PDF Server – Both PDF Conversion and PDF Creation

Able2Extract Server – PDF Conversion Only

Sonic PDF Server – PDF Creation Only

Contents

Style Conventions Used in This Document

The following table (Table 1) describes typographical and naming conventions used in this document:

Table 1.

Style	*Used for*	*Example*
Bold	Elements of the user interface such as buttons, menu commands etc.	click on **Start** button
Italic	Terms	*Job Ticket*
"Double quoted italic"	Reference to a chapter, section etc.	see *"Setting key values"* section

Main objectives

The main objective of all Investintech.com Inc. PDF Server Products is to collect documents (files) of certain types, process them and then return the result back to the sender.

There are 2 options for collecting (receiving) files:

- by local network
- via Email

Investintech.com Inc. PDF Server Product puts all collected files into a queue and processes them using several threads.

There are two methods of processing the collected files:

- Absolute PDF Server and Able2Extract Server only: conversion of PDF documents (*.PDF files) to MS Word, Excel, HTML, or simple text documents.

- Absolute PDF Server and Sonic PDF Server only: creation of PDF documents (*.PDF files) from original MS Word, Excel, HTML, text documents or other files (such as *.PPT; *.RTF; *.INI; *.LOG; *.GIF; *.JPG; *.JEPG; *.PNG; *.PCX; *.VSD).

Files collected through the local network can be retrieved from several specified folders (*Watch Folders*).

Files received via Email can be retrieved from several Email addresses (*POP3 accounts*).
It is possible to specify the processing type (conversion, creation or both) and details of processing for each *Watch Folder* or Email address. The conversion or creation details can be specified on both Server and Client side by means of a special file referred to as *Job Ticket* file (with extension *.tik* on the client side and *.tikd* on the Server side).

If the processing type and the details of processing are not specified by the client (i. e. a *Job Ticket* file is not attached), documents will be processed in according to PDF Server default settings.

In addition to making changes to the PDF Server default settings, Administrator can set some limitations (such as the maximum amount of pages in the original document that can be converted) by means of *Job Ticket Limitations file* — see *"Watch Folders parameters"* for details.

There are several methods of sending files from the client side:

- *Simple method*:

    - ♦ for files sent through a local network:
      User copies selected file(s) to a specified *Watch Folder* (in this case parameters specified on the PDF Server side are used)

    - ♦ for files sent via Email:
      User sends selected file(s) to a specified PDF Server Email address as an ordinary attachment (in this case parameters specified on the Server side are used)

- *Advanced method* (for both files sent through local network and via Email)

    - ♦ User sends selected file(s) to a specified *Watch Folder* or Email address using a popup menu command which invokes a program (installed on the client side) to create accompanying *Job Ticket file*(s) with conversion or creation parameters (for details see *"JTConvGenerator. Administrator Guide"* and *"End User Guide for Creation"*)

    - ♦ User sends a selected file to a specified *Watch Folder* or Email address using *JTConversion* program (installed on the client side). This program allows the user to view the original PDF file and to create an accompanying *Job Ticket file* with conversion parameters (see *"JTConversionViewer Administrator Guide"* for details)

PDF Server requirements

Investintech.com Inc. PDF Server Product main package can be installed on any server that:

- runs Windows 2000 Server or Windows 2003 Server or a server configuration of Windows 2000, Windows XP or Windows 2003 that supports clients

- has at least 128 MB RAM (512-1024 MB is recommended)

- has at least 60 MB free disk space for the PDF Server program and 1-10 gigabytes free disk space for storing temporary data (this amount depends on the traffic and some details of the configuration — whether the processed files are stored on the Server computer, for instance)

- has access to an Email system (if clients will send files via Email)

- can share specified folders for incoming and outgoing files (if clients will send files by local network and *Watch Folder*s will be located on the server computer)

- has access to specified folders on other computers (if the server will pick up files for processing by local network and *Watch Folder*s will be located on clients computers)

- Absolute PDF Server and Sonic PDF Server only: has the corresponding MS Office applications installed — if creation of PDF files from MS Office documents is performed (say MS Word installed — for MS Word documents and so on)

- Absolute PDF Server and Sonic PDF Server only: has the corresponding native application installed that supports the printing of the required file format — if creation of PDF files from non-MS Office documents is performed

Administrator main tasks

Administrator main tasks are:

- To install PDF Server package on the server side (see *"Server Installation"*) and (in case of *Advanced method*) — on client side

- To set configuration parameters (refer to *"How to edit configuration settings"*):

  ♦ for the **Email Parameters** section (if users will send files via Email)

  ♦ for the **Watch Folders Parameters** section (if users will send files by local network)

- To provide end users with the basic information on

  ♦ what Email address will be used to send documents for processing (if users will send files via Email)

  ♦ how to create shortcuts to *Watch Folder*(s) on the client side (if users will send files by local network using *Simple method*)

- To provide clients with any additional information or instructions required to send to send files to the Server or, if applicable, to change the desired conversion/creation parameters:

  ♦ how to use the corresponding software on the client side

- To support the Server and customize its work by setting a convenient schedule for different Server configurations and particular files and by providing other management tasks (see *"Server Workflow Management"*, *"Setting Schedule for Server configurations"*, *"Setting Schedule for particular files"*, *"Setting Email Authorization Options"* , *"Documents processing events and troubleshooting"*)

How to start

After the Server is installed (see "*Server Installation*"), run the Server main application file (*PDFServer.exe*)[1] by clicking on shortcut to it on the desktop or from "Programs" Windows menu — the PDF Server main window will open on the background and a **Configurations** dialog pops up (Fig. 1).

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[1] PDF Server does not run by default when Windows starts — it is up to Administrator to provide that, if it is necessary (see also *"PDF Server command line run"*)
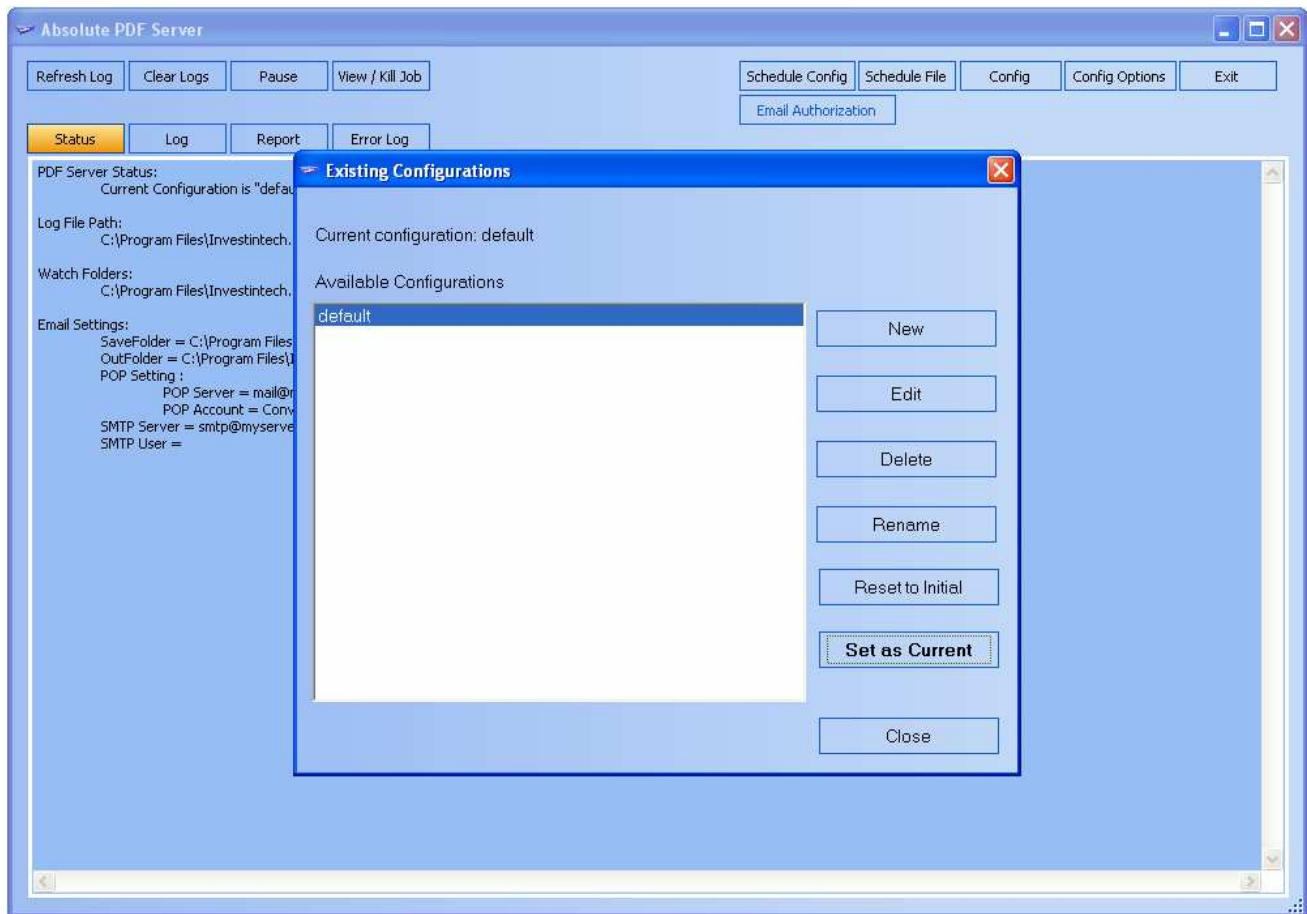
Fig. 1.

Press **Edit** button to view or to change (if necessary) the settings in the **default** configuration (see *"How to edit configuration settings"* for details).

It is possible to create a new configuration file as well and set it as the *current configuration* (see *"How to add a new configuration to the configuration list"* for details).

After the configuration settings have been revised, press the **Close** button. Server will start working by monitoring the *Watch folders* for activity or Email messages for attached files depending on the settings in the current configuration — see Fig 2.

If users will send files via Email, it is necessary to specify a list of authorized Email addresses and/or domains (see "Setting Email Authorization Options" for details)
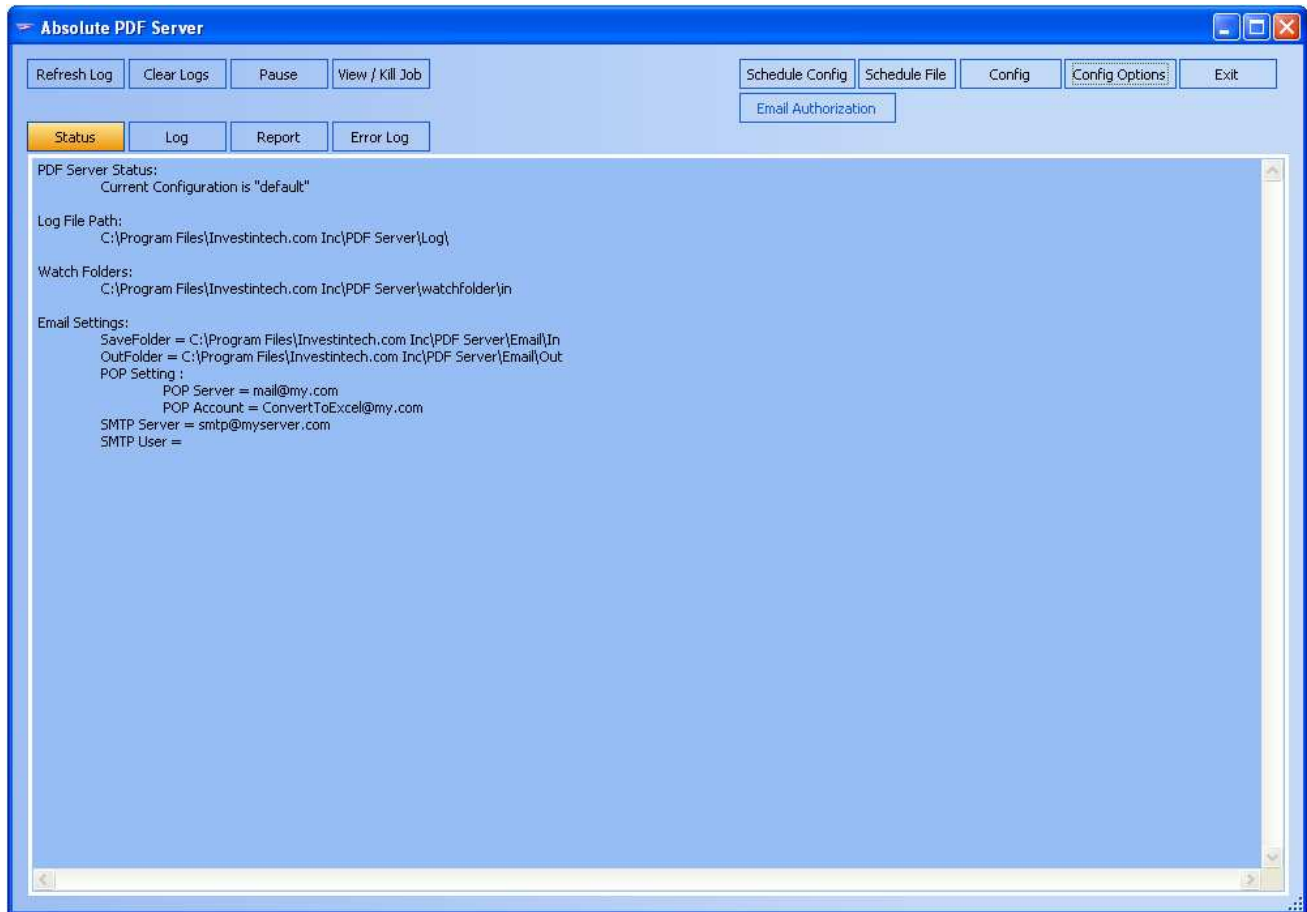
Fig. 2.

How to edit configuration settings

To edit the current configuration, press **Config** button in the PDF Server main window (Fig. 2) — **Configuration Parameters** dialog will open (Fig. 3).

To edit a particular configuration, press **Config Options** button in the PDF Server main window, select the configuration for editing in the **Available configurations** list (see Fig. 1) and press **Edit** button — **Configuration Parameters** dialog will open (see Fig. 3).
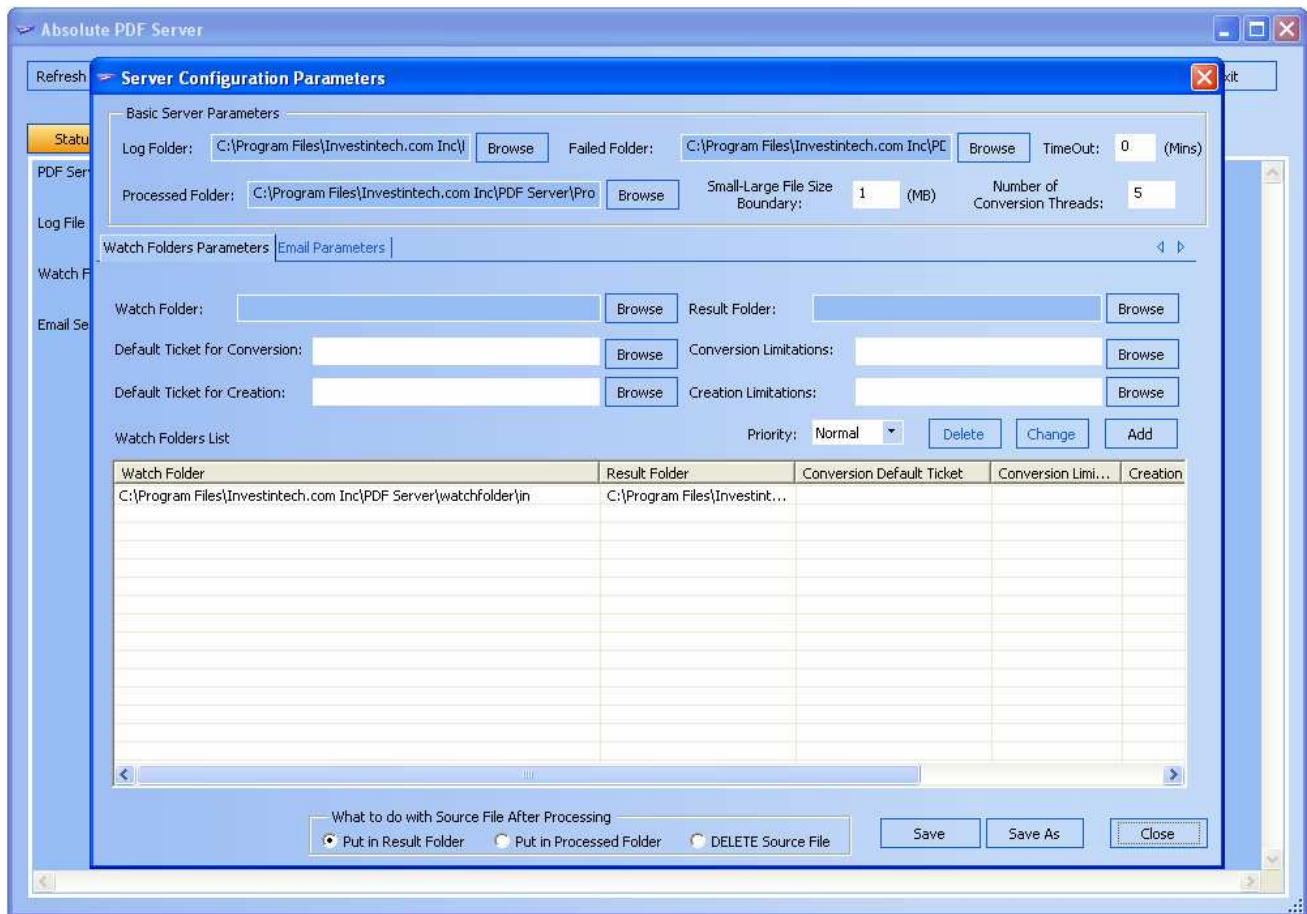
Fig. 3.

There are 3 sections on the **Configuration Parameters** dialog:

Basic Parameters

WatchFolders Parameters

Email Parameters

In most cases it is not necessary to change parameters in the **Basic Parameters** section.

It **is** necessary to change parameters in the **Email Parameters** section if the program will be receiving files for processing via Email — the Email settings will have to match those used by the organization for its Email processing.

If the program will get files for processing from the local network, it is possible to use only one watch folder (added to the watch folders list during installation), but it is recommended to add several *Watch Folders* to the list — a *Watch Folder* for PDF to MS Word conversion, a *Watch Folder* for PDF to Excel conversion, etc. (see *"Watch Folders parameters"* section below)

Basic configuration parameters

Basic Parameters frame is at the top of the **Configuration Parameters** dialog (see Fig. 3)

Log File — name of the folder where the log files will be placed.
There are 2 log files created for each day when PDF Server has been active — one for standard events (Fig 4), the other — for errors (Fig 5).
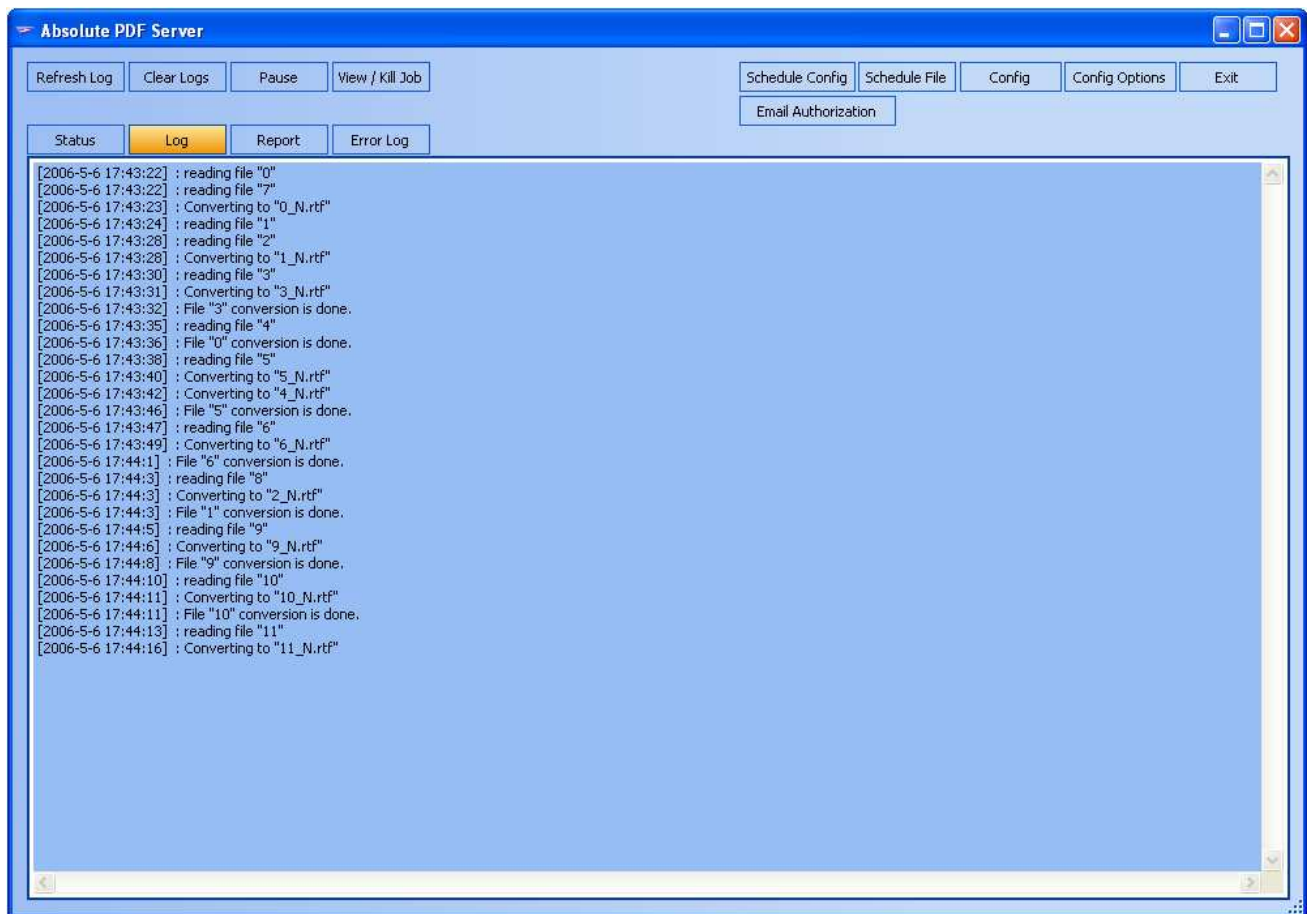

Fig. 4.

Failed Folder — if conversion/creation has failed, the original file and the corresponding *Job Ticket file* (if applicable) are moved into this folder

Processed Folder — the folder where the original document file will be placed after it has been picked up from a *Watch Folder* and processed successfully (only if **Put in Processed Folder** option has been selected inside **Source file** frame **—** see Fig.3, bottom)

(Absolute PDF Server and Able2Extract Server only) **Number of Threads** — number of *threads* used to process files (number of threads must be greater or equal 2). The default value is 5 threads.

(Absolute PDF Server and Able2Extract Server only) **File size boundary** — allows the Administrator to change the boundary used to separate large files from others. (to prevent PDF Server from being blocked by big files — q. e. files with the size greater than **File size boundary** value — there is only one thread to process big files). The default value is 1 MB.
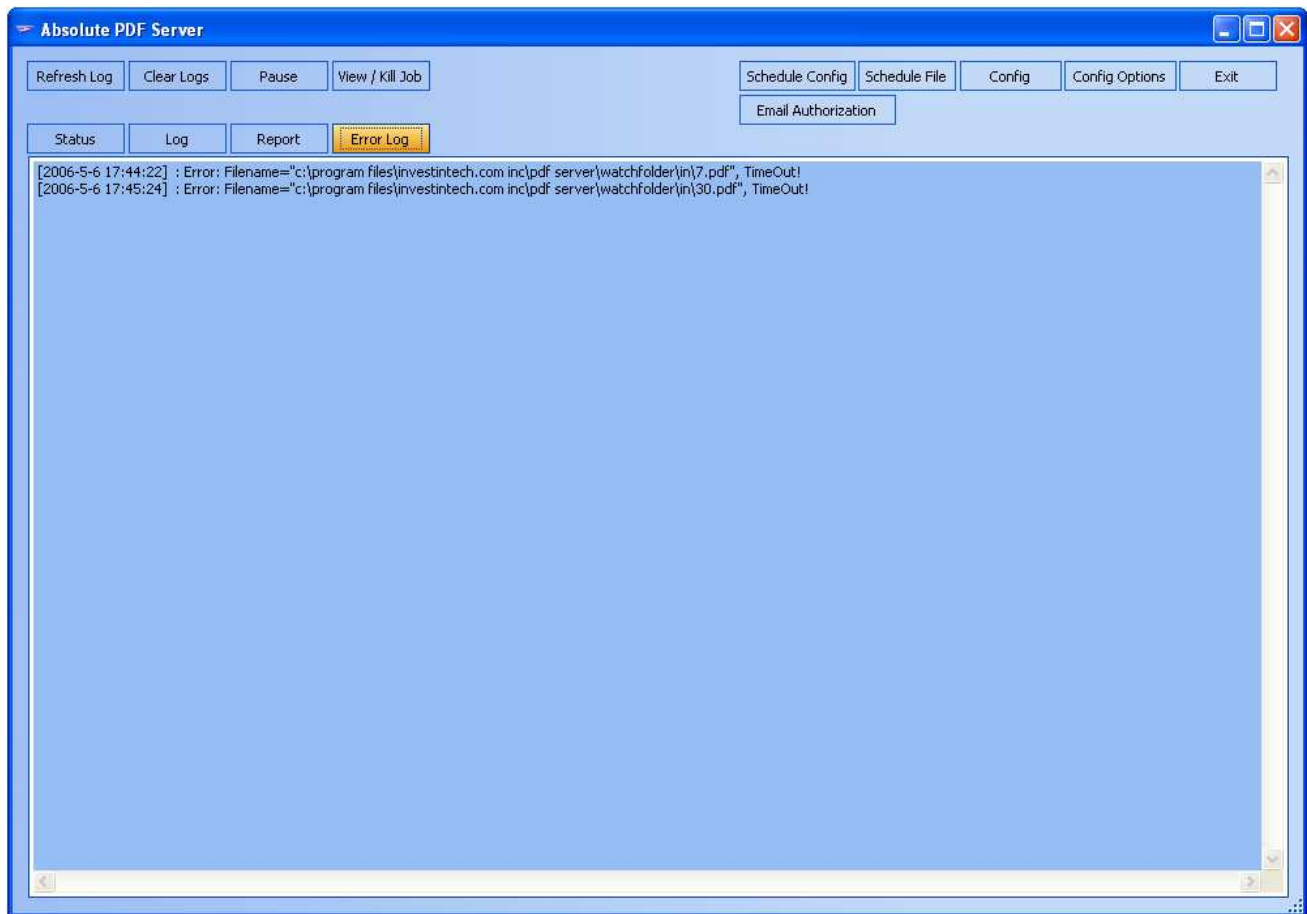
Fig. 5.

To specify the location of the *Log File Folder*, *Failed Folder* or *Processed Folder* press the corresponding **Browse** button, select an appropriate folder in the **Browse for Folder** dialog (Fig. 6) and press OK.

Fig. 6.

To set **Number of Threads** or **File size boundary** parameters just type an appropriate value in the corresponding edit box.

When all necessary parameters are set, press the **Save** button to save the new values in the original configuration file[2] or the **Save As** button to save the new values as a new configuration file.

Watch folders parameters

The following parameters can be set for each *Watch folder* from the *Watch folders list* (Fig. 3):

Watch Folder — a folder (on the server or client computer) where documents (and corresponding *Job Ticket files*) should be placed for processing

Result Folder — a folder (on the server or client computer) where PDF Server places the resulting documents (and the original files as well — if **Put in Result folder** option inside **Source file** frame has been selected)

(Absolute PDF Server and Able2Extract Server only) **Default Ticket for Conversion** — *Job Ticket for Conversion default file* used by PDF Server if the user has not provided a *Job Ticket file* for the original (PDF) file sent for conversion (see below for details)

(Absolute PDF Server and Able2Extract Server only) **Conversion Limitations** — *Job Ticket Limitations default file* used by PDF Server to set certain conversion limitations (such as maximum amount of pages in the original file to be processed — see below for details)

(Absolute PDF Server and Sonic PDF Server only) **Default Ticket for Creation** — *Job Ticket Creation default file* used by PDF Server if the user has not provided a *Job Ticket file* for the original file sent for processing (see below for details)

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[2] If the configuration is currently in use, all changes in the **Basic Configuration** section will be implemented immediately

(Absolute PDF Server and Sonic PDF Server only) **Creation Limitations** — *Job Ticket Creation limitations default file* used by PDF Server to set certain limitations for the original file to be processed — see below for details)

Priority — if set to **High**, then files sent to the *Watch folder* will be placed at the beginning of the queue. The default value is **Normal**.

To set the parameters

for an existing *Watch folder*:
select the corresponding row in the Watch folder list; enter appropriate values for all necessary parameters (see *"Setting parameters for a particular Watch folder"*) and press the **Change** button.

for a new *Watch folder*:
enter appropriate values for all necessary parameters (see *"Setting parameters for a particular Watch folder"*) and press the **Add** button.

To delete a Watch folder from the Watch folder list select the corresponding row in the list and press the **Delete** button

Setting parameters for a particular Watch folder

To set **Watch Folder** or **Result Folder** parameters press the corresponding **Browse** button, select an appropriate folder in the **Browse for Folder** dialog (Fig. 6) and press OK.

To set **Priority** parameter value, open the corresponding list and select an appropriate parameter value. The default value is **Normal**.

PDF Conversion - Absolute PDF Server and Able2Extract Server only

To set **Default Ticket for Conversion** parameters press the corresponding **Browse** button — **Default Job Ticket for Conversion** dialog opens (Fig. 7).

If an appropriate *Converter Default* JT file (**.tikd*) already exists[3], choose **Pick up from disk** and press **OK** button, then select the file in the standard **Open** dialog (Fig. 8) and press **Open** — the selected JT file name will appear in the **Default Ticket for Conversion** box.

Fig. 7.

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[3] Default JT files can be picked from the folder [*InstallFolder*]*Tickets*
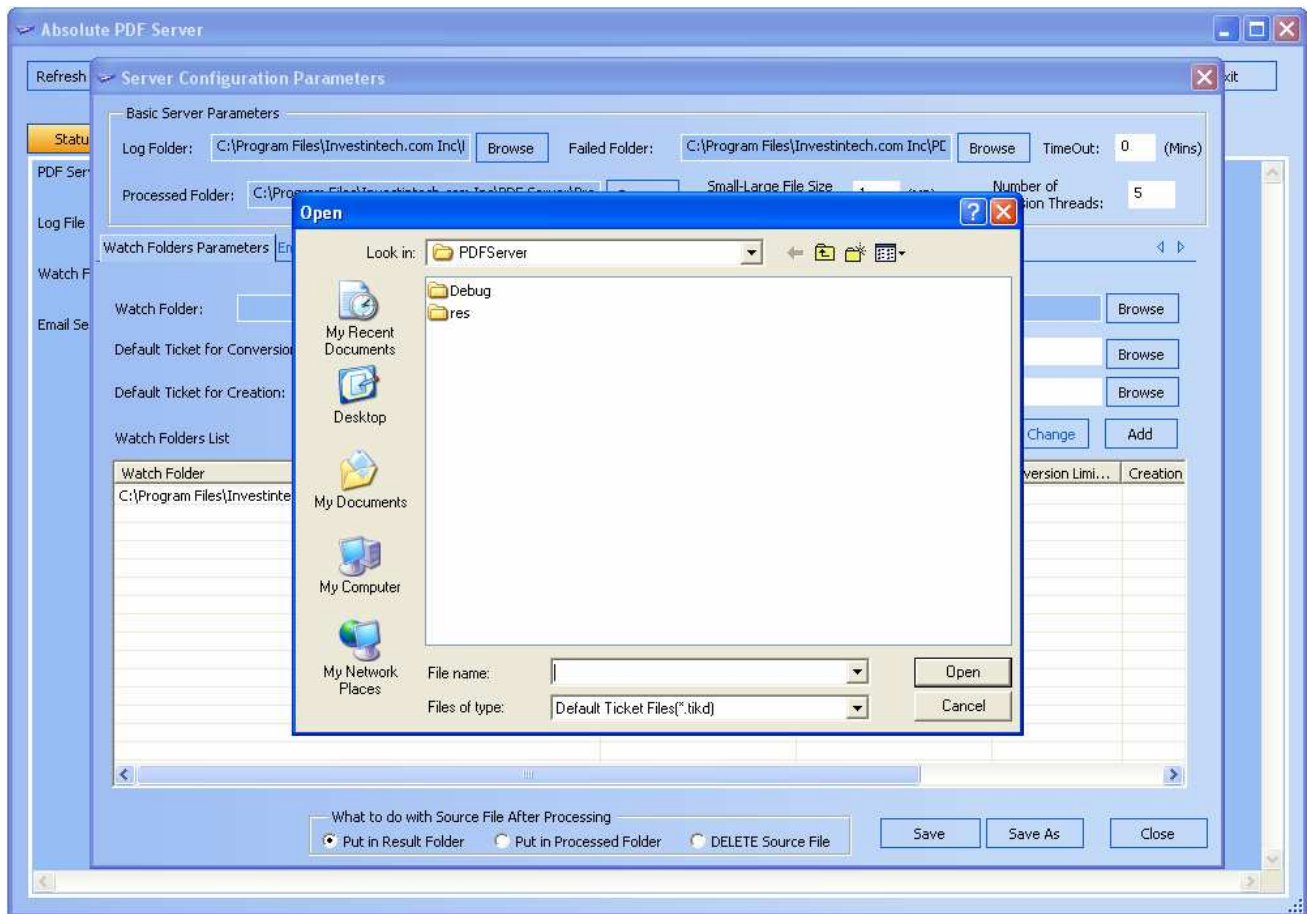
Fig. 8.

If it is necessary to create a new JT file, choose **Create new** and press **OK** button — **Options** dialog opens (Fig. 9).

Set appropriate parameters values (see *"Setting parameters for Conversion (details)"*) and press **OK**, then select the file in the standard **Save As** dialog and press **Save**[4] — the selected JT file name will appear in the **Default Ticket for Conversion** box.

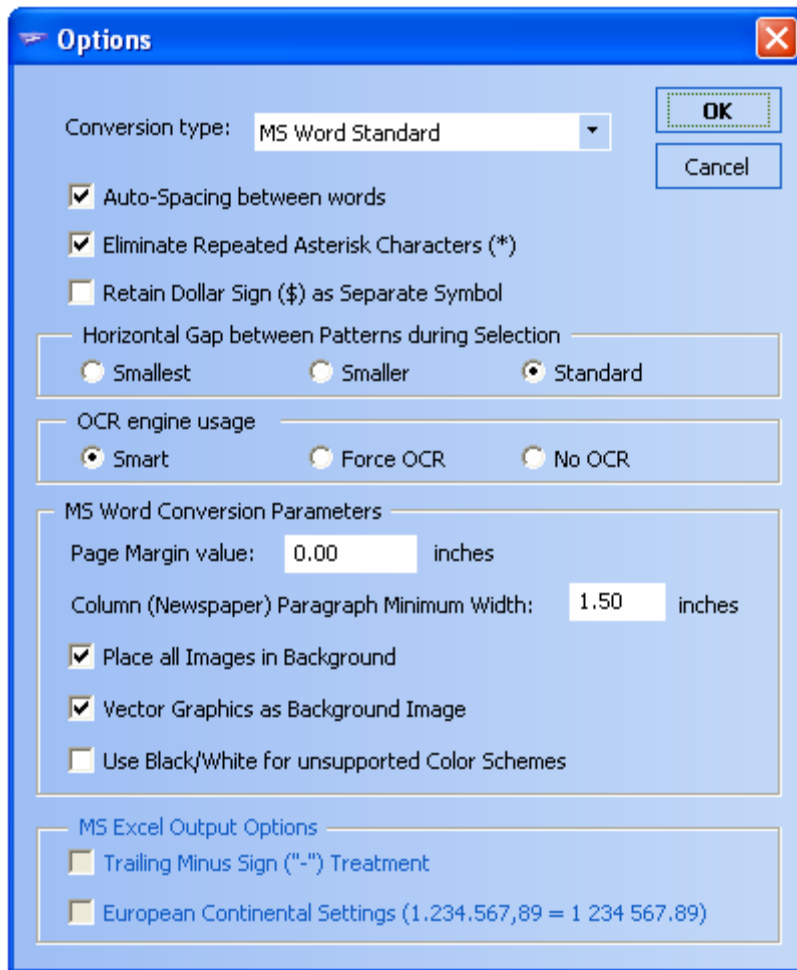[4] The default folder for JT files is [*InstallFolder*]*Tickets*

Fig. 9.

To set **Conversion Limitations** parameters press the corresponding **Browse** button — **Conversion Limitations Job Ticket** dialog opens (similar to the one displayed on Fig. 7).

If an appropriate *Conversion Limitations* JT file (**.tikl*) already exists, choose **Pick up from disk** and press **OK** button, then select the file in the standard **Open** dialog (Fig. 8) and press **Open** — the selected file name will appear in the **Conversion Limitations** box.

To create a new *Conversion Limitations* JT file choose **Create new** and press **OK** button — **Conversion Limitations JT** dialog opens (Fig. 10).
Set appropriate value in **MAX amount of pages to be converted** box and press **OK**, then select the file in the standard **Save As** dialog and press **Save** — the selected file name will appear in the **Conversion Limitations** box.

Comment
*Limitations Job Ticke*t file has *.tikl extension (where letter "l" stands for "limitations").
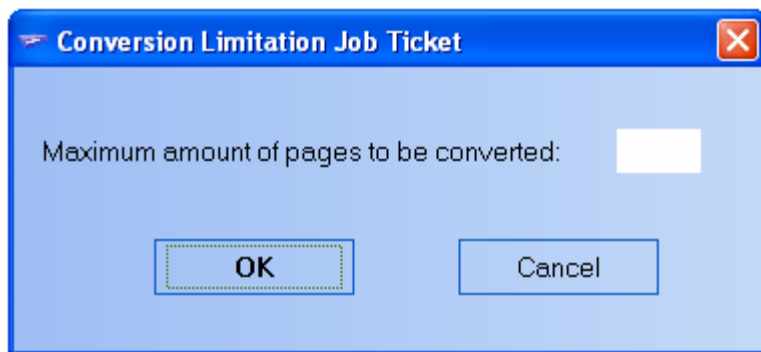
Fig. 10.

PDF Creation - Absolute PDF Server and Sonic PDF Server only

To set **Default Ticket for Creation** parameters press the corresponding **Browse** button — **Default Job Ticket for Creation** dialog opens (similar to the one displayed on Fig. 7).

If an appropriate JT file already exists, choose **Pick up from disk** and press **OK** button, then select the file in the standard **Open** dialog (Fig. 8) and press **Open** — the selected JT file name will appear in the **Default Ticket for Creation** box.

If it is necessary to create a new JT file, choose **Create new** and press **OK** button — **Tickets Setting Properties** dialog opens (Fig. 11).
 Set appropriate parameters values (see "*Setting parameters for Creation (details)*") and press **OK**, then select the file in the standard **Save As** dialog and press **Save** — the selected JT file name will appear in the **Default Ticket for Creation** box.
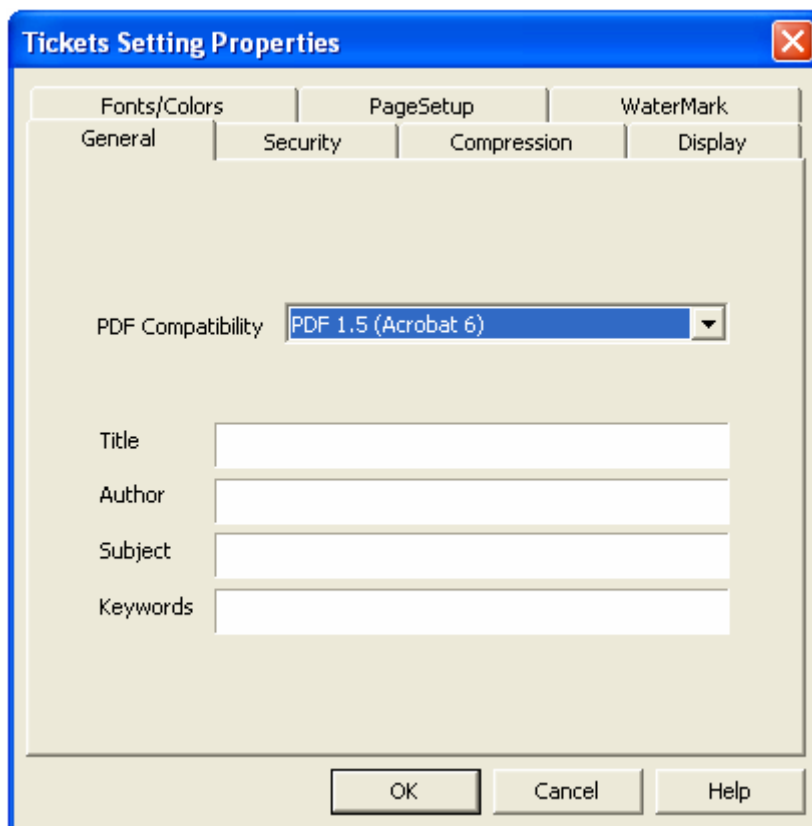
Fig. 11.

To set **Creation Limitations** parameters, press the corresponding **Browse** button — **Creation Limitations Ticket** dialog opens (similar to the one displayed on Fig. 7).

If an appropriate *Creation Limitations* JT file (**.tikl*) already exists, choose **Pick up from disk** and press **OK** button, then select the file in the standard **Open** dialog (Fig. 8) and press **Open** — the selected file name will appear in the **Creation Limitations** box.

If it is necessary to create a new *Limitations* file, choose **Create new** and press **OK** button — **Tickets Setting Properties** dialog opens (Fig. 12).
Select **Set by Administrator** option button for each tab, parameters on which are to be included into the *Limitations* file. Select **Up to User** option button on all other tabs.
Set appropriate parameters values for the each tab where **Set by Administrator** option button is selected (see "*Setting parameters for Creation (details)*") and press **OK**, then select the file in the standard **Save As** dialog and press **Save** — the selected limitation file name will appear in the **Creation Limitations** box.
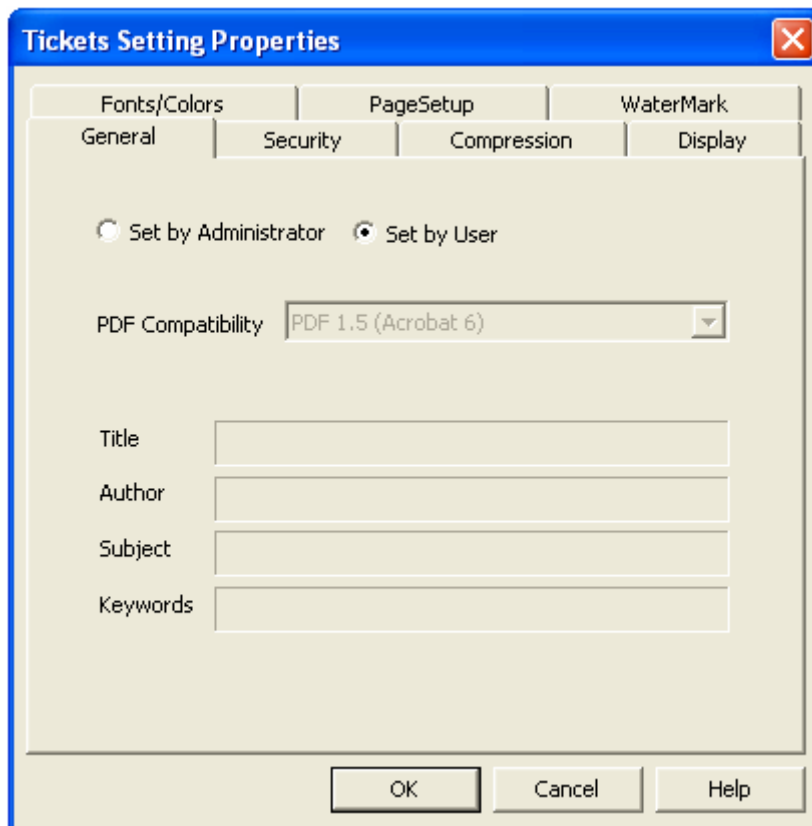
Fig. 12.

When all necessary parameters are set, press **Save** button to save the new values in the original configuration file[5] or **Save As** button to save the new values in a new configuration file (see Fig. 3).

Interaction between settings provided by different types of Job Ticket files

There are 3 types of JT files — *default* (**.tikd*) and *limitations* (**.tikl*) on the Server side, and JT files on the client side (**.tik*)

To create and send a JT file the user needs the corresponding software to be installed on the client side (see also *"Main objectives", Advanced variant*)

If a JT file is not provided the corresponding *default* JT file on the Server side is used (q. e. JT file on the client side has an advantage over the *default* JT file on the Server side).

If *limitations* JT file (on the Server side) exists it has an advantage over both the *default* JT file on the Server side and JT file on the client side.
It means that:

for Creation — if a particular section of the *limitations* JT file has **Set by Administrator** option button selected (see Fig. 12), parameters' values from this section will be used instead of the corresponding parameters provided by both the *default* JT file on the Server side and JT file on the client side;

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[5] If the configuration is currently in use, all changes will be implemented immediately

for Conversion — as soon as there is only one limitation parameter for Conversion (*MAX amount of pages to be converted*) — if the user send a PDF file and total amount of pages in this file to be converted is more than the limitation parameter, the PDF files will not be processed and the corresponding message will be sent to the user.

Absolute PDF Server and Able2Extract Server only - Setting parameters for PDF Conversion

This section describes the meaning of the parameters shown on the **Options** dialog (Fig. 9).

Conversion type

Select the conversion type from the list of six possible types:

- **MS Word Standard**
  retains background graphics as a background image in the converted output, and the textual layout using the layout of the original PDF document for guidance. For most documents, this will provide the best looking output in a format that is simple to edit. As such, it is the recommended format for most documents

- **MS Word with Frames**
  results in the converted PDF to Word output retaining the background graphics and layout of the selected pages and items, but with the text appearing in individual text boxes in a new word document. This conversion is ideal for users that prefer to work with text boxes which can be easily moved within a document. Under certain circumstances, because the text boxes are designed to correlate with the structural positioning of the original PDF document, it may be possible to generate a more accurate layout than with the Standard conversion selection option

- **MS Word Simple**
  converts only the text portions of the document. The text will appear as a standard paragraph without special formatting or text boxes in a new word document. This conversion is most useful when preserving the look and feel of the PDF in Word format is not important, but the user desires easy access to the text information

- **Excel Auto**
  automatically determines the positioning of the Excel columns. In most cases, this will result in perfect alignment within Excel.
  In cases where the "Automatic" conversion results in column misalignments within Excel, the user may want to use the "Custom" conversion option. The "Custom" conversion option allows the user to designate the columns prior to conversion to Excel. This option is available only in the *A2E Viewer* program installed on the client side (see "")

- **HTML**
  converts the document to an HTML (Hyper Text Markup Language) file

- **Text**
  converts the document to a plain ASCII text file

The default value is **MS Word Standard**.

Common parameters

This section includes parameters which are applicable to all conversion types

Auto-Spacing between words
Some PDF documents are created so that their internal structure does not demarcate "spaces" between words, even though the viewable PDF page does contain spaces between words. As such, the *Accumax CT* conversion engine automatically adds spaces between document patterns (i.e. words) as a default setting.
In certain cases, such as the case of rarified *Justify* alignment, the Auto-Spacing Between Words default can result in the insertion of extra spaces between words and a poor conversion results. In these cases, conversion results may improve if the **Auto-Spacing Between Words** setting is deselected.

Eliminate Repeated Asterisk (*) Characters
Documents occasionally have a line of repeated asterisk characters, which may interfere with PDF conversion results. The Eliminate Repeated Asterisk (*) Characters setting allows the users to replace repeated asterisks (more than 2, **) with the following: " *** ".

Retain Dollar Sign ($) as Separate Symbol
Use this option to retain separate "$" symbols in the converted document. In certain cases, the dollar sign placement is located far from the corresponding number – this makes it difficult for the *Accumax CT* conversion engine (and sometimes even for the human eye) to match the symbol in the appropriate location. Selecting this option ensures that the dollar sign symbol is retained in for the converted document.

Horizontal Gap between Patterns during Selection
This option allows you to change the minimal gap between patterns and columns during the selection and conversion. Sometimes the distances or gaps between several different patterns in a PDF document are too small – and they are treated as one pattern by our conversion engine.
It can cause problems e. g. for PDF to Excel conversion when two patterns are merged and placed into the same Excel column instead of putting them in two different columns.

OCR engine usage
This option allows you to specify the OCR engine implementation.
There are 3 possible variants of the OCR implementation:

- **Smart** — for each page of the original PDF document program tries to recognize whether to use OCR for the page or not

- **Force OCR** — OCR engine will be implemented to each page of the original PDF document

- **No OCR** — OCR engine will not be implemented to any page of the original PDF document

Comment
It is recommended to use **Force OCR** option only for special *Watch folders* or Email addresses intended to process scanned documents only. These special *Watch folders* and Email addresses should be supplementary to the standard ones (i.e. with the **OCR engine usage** option set to **Smart**) and should be used for the PDF documents processed in a wrong way with the *Smart* option.

MS Word Conversion Parameters
This section includes parameters which are applicable to conversion to MS Word only

Page Margin Value
Use the **Page Margin Value** setting to change the size of the printable margins for a Word document converted from a PDF document.

The default **Page Margin Value** is 0.00 inches – this is chosen because it provides the best positional output when converting a document from PDF to Word.

Certain office printers cannot print the whole page area of a PDF – i.e. 0.00 inch margins on a page will not print. If this is the case, the Page Margin Value allows you to set the printable margins appropriate for your printer.

A *Page Margin Value* of 0.2-0.5 inches will generally work best on most printers

Column (Newspaper) Paragraph Minimum Width (applicable only for **MS Word Standard**)

Many PDF documents are formatted with column paragraphs, or newspaper-style paragraphs. To assist in the recognition and conversion from PDF to Word for these types of paragraphs, the user can designate the minimum width for column/newspaper paragraphs.

The *Accumax CT* conversion engine contains complex algorithms for differentiating between table columns and paragraph columns – however, in some cases, it is very difficult for the engine to distinguish between these two types of paragraph. The **Column (Newspaper) Paragraph Minimum Width** setting allows users to improve conversion results by providing input regarding a PDF document's structure.

E. g. if it is known that a given document does not have any column/newspaper paragraphs with column widths of less than 2.00 inches, changing the **Column (Newspaper) Paragraph Minimum Width** to 2.00 inches will prevent the *Accumax CT* engine from treating some table columns as column/newspaper paragraphs.

The default for this setting is 1.00 inch

Place all Images in Background (not applicable for **MS Word Simple**)

This setting will place all images identified within a PDF document onto the background, as a background image, in the converted Word document. By default, *Accumax CT* adds images (such as JPG or BMP files) as MS Word pictures, so that you can format each image separately or change/move their position within the document.

In certain cases dealing with *masked images*, the conversion into Word may not be properly rendered based on our default setting. In certain other cases, attributable to an inappropriate Z-order[6] allocation within the PDF source, images may also be incorrectly displayed – such as problems with image borders or disappearing images. In both of these cases, selecting this option of adding all images to the background image may avoid problems in the image display for the converted document.

Vector Graphics as Background Image (not applicable for **MS Word Simple**)

This option converts all PDF vector graphics objects within a page into a background image. What are vector graphics? Generally, there are two kinds of graphical objects in PDF documents – pixel-based images and vector graphic images (consisting of lines and shapes).

Pixel-based images that are viewed in Word may result in varying resolution – if the image is resized or redrawn, MS Word will attempt to add/remove pixels based on an algorithm. In most cases, the result is a loss in image quality – for instance, thin lines might disappear under low resolution.

Vector graphics, on the other hand, in PDF may be drawn at any resolution – which may result in better conversion results upon conversion into Word. However, in some cases, the number of vector objects comprising an image may be high, which may compromise the conversion for a particular Word document.

In cases where the rendering of vector graphics poses problems in the display of the conversion

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[6] order in which graphics objects overlap each other

output, this option allows the user to display all vector graphics as a background image. By doing so, it ensures the integrity of the vector graphic image – although the drawback is that the vector image is not easily moved within the Word document.

Use Black/White for unsupported Color Schemes

Certain color schemes used in PDF documents are not currently supported by our PDF viewer – by default the conversion is conducted with a random color scheme in such cases. This option allows you to select a Black/White color palette for such situations where the color scheme is not supported.

Excel Output Options

This section includes parameters which are applicable to conversion for **Excel Auto** only

Trailing Minus Sign (" – ") Treatment

In certain financial documents or reports, the minus sign symbol trails to the right of the number that it is associated with (e.g. "4,560-" instead of "-4,560"). Converting negative numbers where the minus sign trails to the right of the number may cause the resulting conversion to Excel to place these numbers as text items, rather than number items.

Use this option to move trailing minus signs from the end of the number to the beginning of the number, to prevent such instances from being converted to textual items in Excel.

European Continental Settings (1.234.567,89 = 1 234 567.89)

In North America, the decimal point is a period – which separates the integer portion of a number from the fractional portion – and the thousand separator is a comma. In certain other countries, the reverse is true: a decimal comma is used to separate the integer portion of a number from the fractional portion, and a period is used as the thousand separator.

This option allows you to convert documents that adopt the decimal comma and "period" thousand separator (referred to here as European continental settings) to Excel formatted numbers correctly.

Absolute PDF Server and Sonic PDF Server only - Setting parameters for PDF Creation

This section describes the meaning of the parameters shown on the **Tickets Settings Properties** dialog (Fig. 11).

Page Setup

Page Rotation options: off(manually), individually(Page by page) and Collectively by File(Whole file)

Output PDF resolution setting: 8 options

ASCII 85 encoding selection – ASCII 85 is a encoding standard. Used in Postscript, ASCII85 is more space efficient than MIME base 64.

Page size selection - standard or custom, both can be showed and operated in 3 kinds of unit: Inches, MMs or Points

Page content scaling from 1%-100%

Page orientation - use can select only when Auto-Rotate pages sets to off

Compression

Text compression

Color images compression

downsample: 4 options - sample methods

resolution: 10-2400 dpi,

compression: 5 options - compression algorithms

quality: applicable only when compression is set to JPEG

Greyscale images compression - similar to color images compression

Monochrome images compression - similar to color images compression, but compression options are different and no quality option

Will add JBIG and JPEG200 options when they are available

Font/Color

4 options, 2 for font and 2 for color – For fonts options, these features are Adobe PDF Specifications' switches or parameters; for color options, there features are color handling algorithms or methods.

Display

Viewer Preferences, 7 options – are features defined in Adobe PDF Specifications

Page layout, 4 options – are also features defined in Adobe PDF Specifications

Open Action – set up open PDF file at certain page #(page 1 to the count of the PDF pages, if the value is greater that the page count, sonic pdf will automatically set it to page count) and certain zoom status(12 options)

Watermark

supports text type watermarks - page #, header, footer, …

Select predefined watermark: five predefined watermarks

Opacity setting

Select if only apply to first page

Select if watermark to be applied as background

Advanced: A dialog which can change watermark settings - text, font, size, …

watermark type: page number, text and image. Now only support the first two and cannot be changed

Properties are described in the Table 2.

Table 2.

	Page Number	*Text (including Text, Header, Footer, Confidential)*
Text	N/A	Maximum 256 characters
Format	5 options	N/A
Font	Support 14 standard font	same
Size	8 to 72	same

Color	Depends on Windows system	same
Style	Normal, Bold, Italic and Bold Italic	same
Angle	0 – 360 degree	same
Position	9 options, not support user define now	same

Email parameters

Email parameters are divided into 2 parts:

- common parameters providing support for the mailing system;
- specific parameters for each PDF Server Email address.

Common Email parameters

The following common parameters should be set to provide a support for the users sending files via Email[7] (see Fig. 13):

Use Email Authorization — if the check box is selected, PDF processes incoming Email in according to the **Allowed Email Addresses** list (see *"Setting Email Authorization Options"* for details)

SMTP Server — SMTP Server host used to send Email messages back

SMTP Port — SMTP Server Port (the default value is 25)

SMTP Account — SMTP Server log on account name (in case if the Server requires authentication)

SMTP Password — SMTP Server log on password (in case if the Server requires authentication)

How often — how often the PDF Server checks the Email box

Return Address — the *Return-Path* field value to be set in all back messages (this address appears in the **To** Email message field when one presses the **Reply** button — say in *Outlook Express*)[8]

CC To — the Email address where a copy of the result should be sent (CC field in Email message)[9]

Subject — the subject of Email message

Email Inbox Folder — a folder where documents received via Email are placed before processing

Email Outbox Folder — a folder where results of the processing of documents received via Email will be temporarily located until they will be sent back to the user

Specific Email parameters

POP3 Server — POP Server host

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[7] Contact your Web Administrator to get the parameters for the **Email Parameters** section if necessary

[8] For ordinary messages people send to each other, message's *Return-Path* field in most cases is the same as the *From* field, but there is no reason for the PDF Server to receive reply messages from clients — that is why it is better to specify in the *Return-Path* field an *Administrator* or *Customer Support* Email address

[9] This address can be used for example

POP3 Port — POP Server Port

POP3 Account — Server email address

POP3 Password — Server email login password

(Absolute PDF Server and Able2Extract Server only) **Default Ticket for Conversion** — *Job Ticket Conversion default file* used by PDF Server if the user has not provided a *Job Ticket file* for the original (PDF) file sent for conversion (see *"Watch folders parameters"* for details)

(Absolute PDF Server and Sonic PDF Server only) **Default Ticket for Creation** — *Job Ticket Creation default file* used by PDF Server if the user has not provided a *Job Ticket file* for the original (PDF) file sent for conversion (see *"Watch folders parameters"* for details)

(Absolute PDF Server and Able2Extract Server only) **Conversion Limitations** — *Job Ticket limitations default file* used by PDF Server to set certain conversion limitations (such as maximum amount of pages in the original file to be processed — see *"Watch folders parameters"* for details)

(Absolute PDF Server and Sonic PDF Server only) **Creation Limitations** — *Job Ticket creation limitations default file* used by PDF Server to set certain limitations for the original file to be processed — see *"Watch folders parameters"* for details)

Setting Email parameters

To set **Email Inbox Folder** or **Email Outbox Folder** parameters press the corresponding **Browse** button, select an appropriate folder in the **Browse for Folder** dialog (Fig. 6) and press OK.

To set **Default Ticket for Conversion**, **Default Ticket for Creation**, **Conversion Limitations**, **Creation Limitations** parameters press the corresponding Browse button and either select an existing *Job Ticket* file or create a new one (see *"Watch folders parameters"* for details)

To set the other parameters type appropriate values in the corresponding edit boxes.

When all necessary parameters are set, press **Save** button to save the new values in the original configuration file[10] or **Save As** button to save the new values in a new configuration file.

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[10] If the configuration is currently in use, the changes in **Email** section will be implemented after PDF Server is reloaded
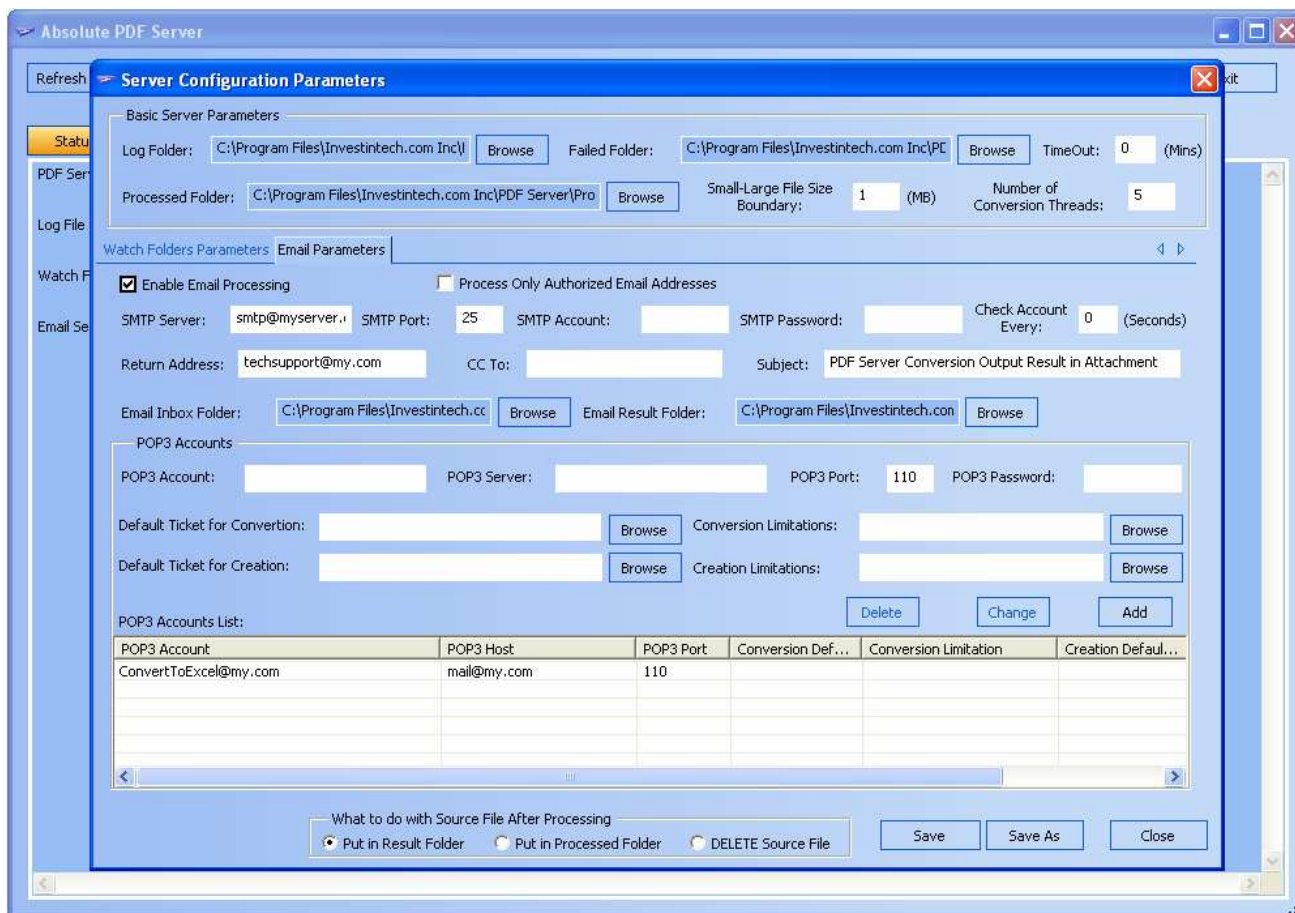
Fig. 13.

How to add a new configuration to the configuration list

To add a new configuration to the configuration list press **Config options** button in the PDF Server main window (see Fig. 3) — **Configurations** dialog opens (Fig. 1).

Press **New** button — a new configuration (copy of the *default* configuration) will appear in the **Available Configurations** list.

Select the new configuration name in the list, press **Rename** button, type an appropriate name in **Name** box (Fig. 15) and press **OK**.

To change the created configuration settings press **Edit** button and change the corresponding parameters as it described in *"How to edit configuration settings"*.

To set the selected configuration as *current* configuration, press **Set as current** button

Comment

A new configuration is always being created on the base of *default* configuration[11].
Press **Restore Original** button if it is necessary to replace the content of the selected configuration with the original default configuration settings from the installation package

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[11] It is possible to edit *default* configuration but it is not allowed rename or delete it

Changing the current configuration

To change the current configuration select the corresponding configuration in the **Available Configurations** list (see Fig. 1 or Fig. 15) and press **Set as current** button.

If there is no scheduled configurations in the **Configurations** list (see *"Setting Schedule for PDF Server configurations"* for details), the selected configuration will be working until a new configuration is set up as *current*.

If some scheduled configurations exist the selected configuration will be working until time for a nearest scheduled configuration comes.
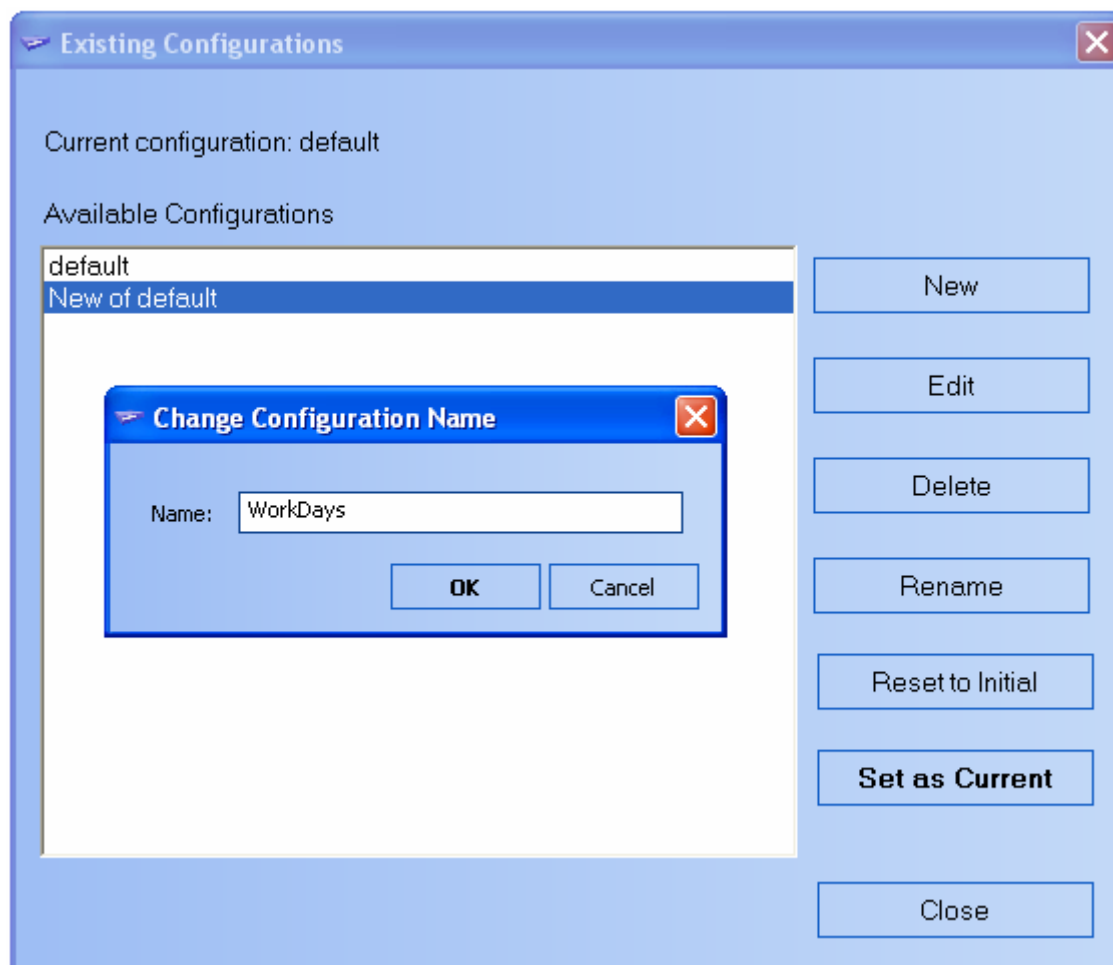
Fig. 14.

If a scheduled configuration is working at the moment when **Set as current** button is pressed, the selected configuration will replace the working one and it will work till the time specified in the scheduled configuration as *Finish* (actually, PDF Server will add a s*ingular* configuration task with the *Start* time set to a current time and *Finish* time specified in the replaced scheduled configuration[12] — see *"Setting Schedule for PDF Server configurations"* for details).

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[12] It is done to prevent PDF Server from implementing the scheduled configuration again if it (PDF Server) restarts

Setting Schedule for PDF Server configurations

It is possible to set a schedule to use different PDF Server configurations in different cases (say during weekdays, on weekends and so on).

To set a schedule for PDF Server configurations press **Schedule Config** button in the PDF Server main window (see Fig. 3) — **Schedule** dialog opens (Fig. 16).

To add a configuration to the schedule:

Select the appropriate configuration in the **Configurations** list.

Press **View** button to view settings for the selected configuration if necessary.

Select **Regular** or **Singular** option button depending on whether it is necessary to implement the selected configuration regularly or at a particular date and time.

Set other corresponding settings:

Day of week, time **From** and time **To** for (if **Regular** was selected)

Date and **Time** (if **Singular** was selected)

Press Add button to finish the process.
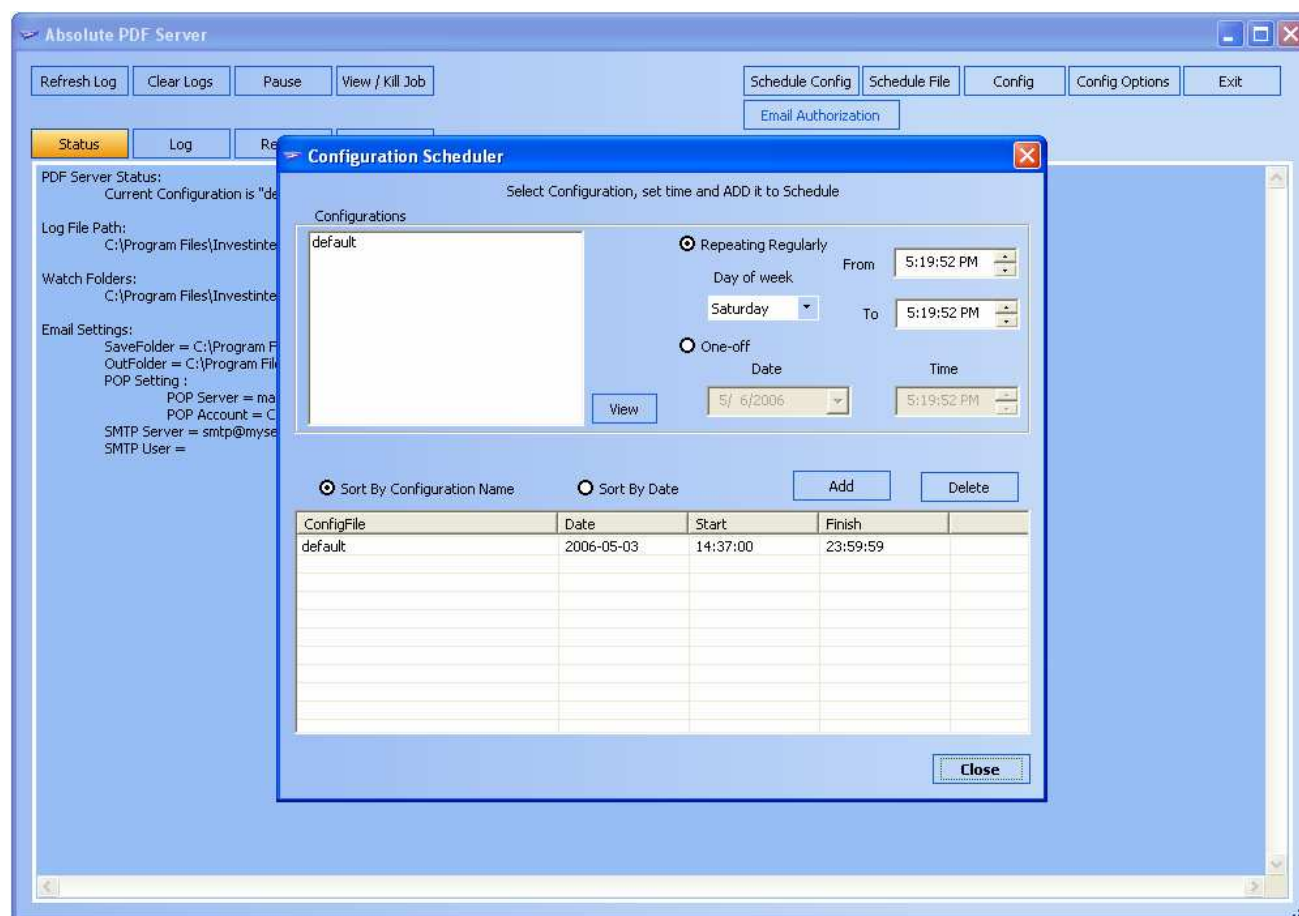
Fig. 15.

To delete a configuration from the schedule select the configuration in the Schedule list and press **Delete**.

To sort **Schedule** list by configuration name or by date select corresponding option button (**Sort by Configuration** or **Sort by Date**).

After the configuration is set close the **Schedule** dialog.

PDF Server checks *Schedule* list every 1 min and as soon as the current time is greater or equal to the *Start* time of a particular configuration in the *Schedule* it makes the configuration *current* and the configuration will start working.
If there are two or more overlapped configurations PDF Server starts from the earliest and then the second configuration will start working and so on.

If there is no configuration to start, and the current time becomes greater or equal to the *Finish* time of the *current* configuration, then the *current* configuration ends and if there are other configurations in *Schedule* for which the current time lays between the configuration *Start* and *Finish* time, PDF Server will start the configuration which *Start* time is the closest to the current time.

Example

Let us suppose, there are 3 configurations in the Schedule:

from 1 pm to 8 pm

from 3 pm to 6 pm

from 4 pm to 5 pm

```
1_____8
        3_____6
            4__5
```

At 1 pm the 1st configuration will start working.
At 3 pm the 2nd configuration will start working.
At 4 pm the 3rd configuration will start working.
At 5 pm the 2nd configuration will start working.
At 6 pm the 1st configuration will start working.
At 8 pm *default* configuration will start working.

Comment

Singular configuration always has advantage over *regular*.
For example, if there is one more configuration in *Scheduler* for the particular date, and it overlaps with 3 configurations described above — say starts at 2 pm and ends at 7 pm — then the sequence of events (for the particular date) will be the following:
At 1 pm the 1st configuration will start working.
At 2 pm the 4th configuration (*singular*) will start working.
At 7 pm the 1st configuration will start working.
At 8 pm *default* configuration will start working.

Setting Schedule for particular files

If it is necessary to specify date and time for a particular file(s) to be processed (actually set to the *processing queue*), press **Schedule File** button in the PDF Server main window (see Fig. 3) — **Schedule for Files** dialog opens (Fig. 17).
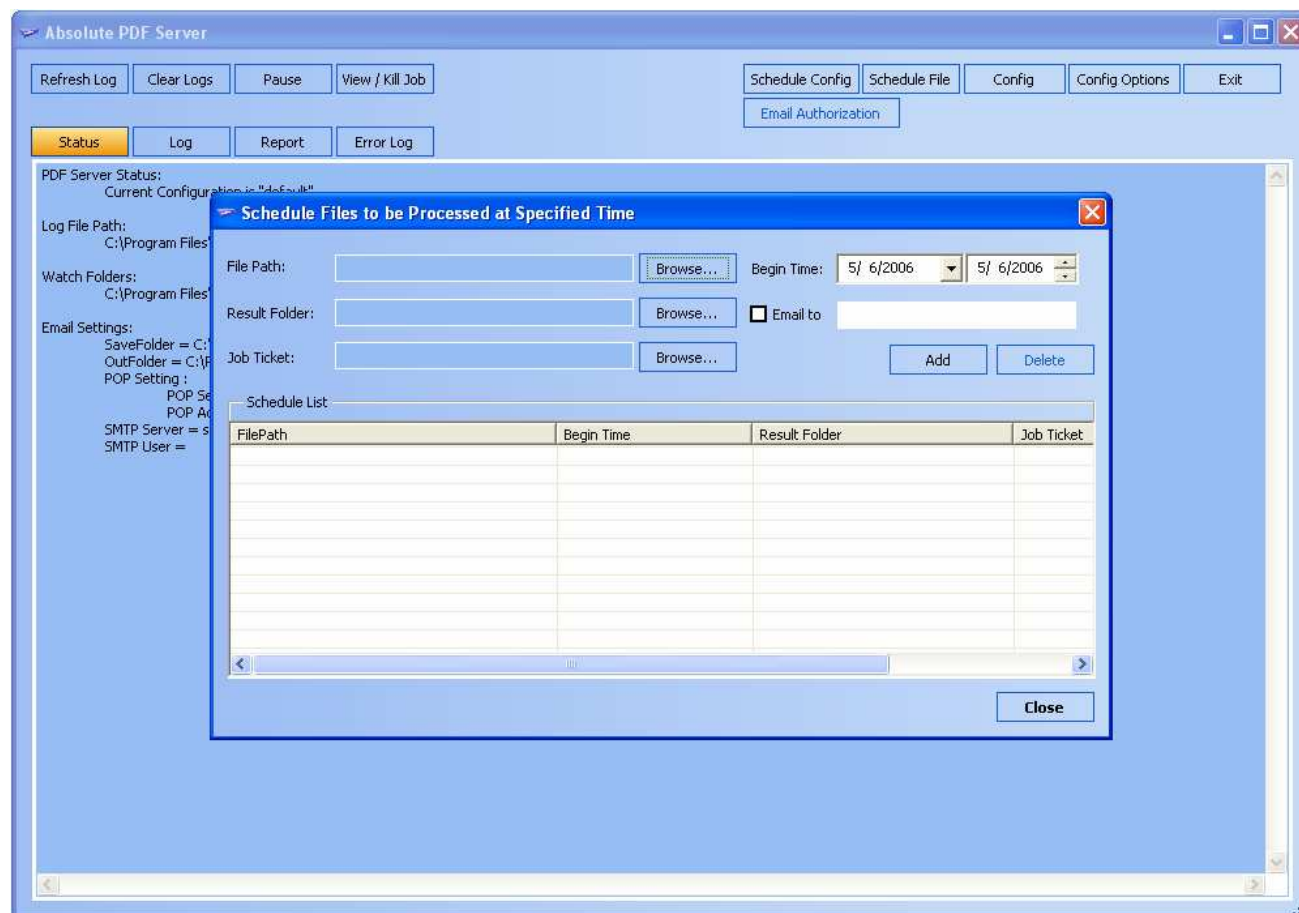

Fig. 16.

Specify the path to the file, output folder name, JT file (if exists) and Email address (if the result should be sent via Email) date and time for the file to be set to the *processing queue* and press **Add** button — the specified parameters will be added to **Schedule List**.

To delete file from **Schedule List** select the corresponding row in the list and press Delete button.

Comment

After file is set to the *processing queue* it will be deleted from **Schedule List** automatically.

PDF Server Workflow Management

There are several actions that can be implemented during the file processing.

Administrator can:

- Clear Log windows
- Pause/Resume the file processing

- View the current jobs processing queue and remove (*kill*) particular jobs from it

- View the *Report* with the information about the current PDF Server session

Clearing Log windows

To clear Log windows press **Clear Logs** button in the program main dialog (see Fig. 4) — information will be wiped out from the screen in both **Log** and **Error Log** windows (but **not** from the corresponding log files).

Pause/Resume file processing

To pause the file processing press **Pause** button in the program main dialog (see Fig. 4) — it will pause processing for all files in the processing queue.

It means that all file, which PDF Server did not start to process, will not start (until **Resume** button is pressed), but all files which are processing at moment when **Pause** button is pressed, will be processing until the process is finished.

To resume the file processing after it has been paused, press **Resume** button.

How to view the processing queue and remove particular jobs from it

To open the dialog with the list of jobs to be processed, press **Kill Job** button in the program main window (see Fig. 4) — a dialog **Current Jobs listing** will open (Fig. 18).

To remove particular files from the processing queue put corresponding checkmarks in the **Type** column and press **Kill Job(s)** button

Comment

Column **Type** in the list shows whether the file is less (**Small**) or greater (**Large**) than *File size boundary* (for details see *"Basic Configuration parameters"* section).

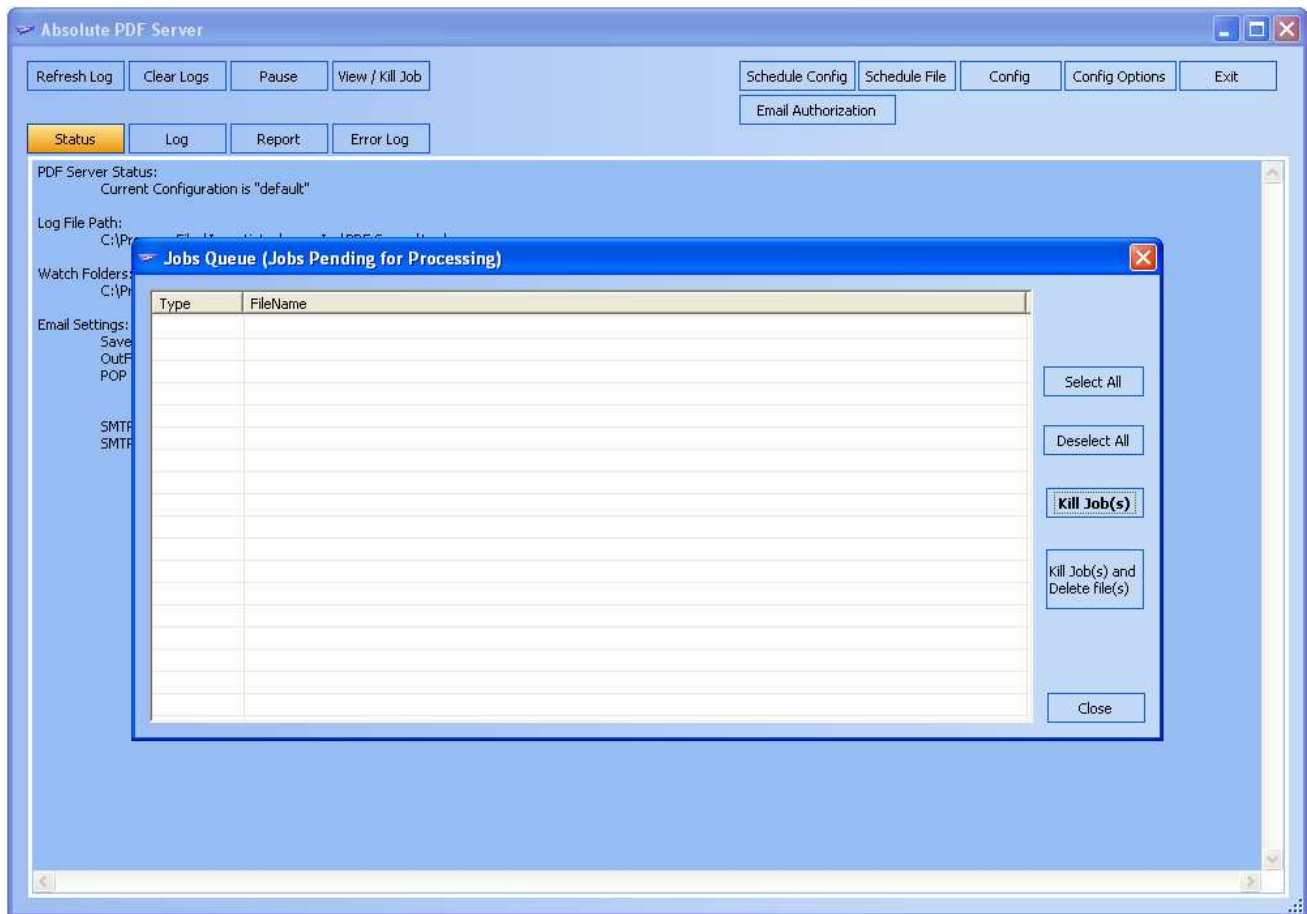Press **Close** button to close the **Current Jobs listing** dialog.

Fig. 17.

Watching the *Report*

To open the **Report** window press **Report** button in the PDF Server main window (see Fig. 19)

Fig. 18.

In the **Report** window the following information about the current PDF Server session is presented:

- **Start time** — time when the current session started;

- **Total Jobs** — total amount of jobs from the beginning of the current session;

- **Successful Jobs** — total amount of successful jobs from the beginning of the current session;

- **Unsuccessful Jobs** — total amount of unsuccessful jobs from the beginning of the current session;

- **Total Amount of threads** — total amount of threads at the present moment;

- (Absolute PDF Server and Sonic PDF Server only) **Creation thread** — the current state of the *Creation thread* (*working* or *idle*);

- (Absolute PDF Server and Able2Extract Server only) **Large files conversion thread** — the current state of the *Large files conversion thread* (*working* or *idle*);

- (Absolute PDF Server and Able2Extract Server only) **Small files conversion threads working** — amount of *Small files conversion threads* working at the present moment;

- (Absolute PDF Server and Able2Extract Server only) **Small files conversion threads being idle** — amount of idle *Small files conversion threads* at the present moment;

- **Number of received Email** — total number of Email messages received during the current session.

- More detailed information about each thread either working at the present moment or being idle (if it was working during the current session):

- ♦ Starting time;

- ♦ Document name

- ♦ Status (either *Processing* or time when the last job was over)

Documents processing events and troubleshooting

The treatment of a document (file) starts when it has been placed into a *Watch folder* or received via Email (in the last case PDF Server shows a notification message — to simplify the file processing tracing).

After a document (file) has been placed into a *Watch folder* or received via Email, PDF Server either starts processing it immediately (if there is a suitable free thread) or puts it into the processing queue (see *"How to view the processing queue and remove particular jobs from it"* for details on managing files placed into the processing queue).

Here is the sequence of events happening after PDF Server starts processing the file (the corresponding notifications will appear in the *Log* window — see Fig. 4 — and will be written in the *Log file*):

- Absolute PDF Server and Able2Extract Server only - for Conversion:

  1. reading the file

  2. converting the file

  3. conversion is finished

  4. sending the conversion result via Email (only for files sent via Email)

  5. the file has been sent via Email successfully (only for files sent via Email)

- Absolute PDF Server and Sonic PDF Server only - for Creation:

  1. Begin to Create file to (filename.pdf)

  2. Succeed Creation for (filename.pdf)

  3. Begin Send creation result to (emailaddress) (only for files sent via Email)

  4. Succeed sending the creation result of file (filename) to (emailaddress) (only for files sent via Email)

If an exception arises, then the error notification will appear in both *Log* and *Error Log* windows and the corresponding information will be either sent via Email to the user (in case if the original file has been received via Email) or placed into the corresponding *Out folder*[13] (in case if the original file has been placed into a *Watch folder*).

If the exception arises before the conversion/creation is finished, the original file will be placed into the *Failed folder*.

If it arises during sending the result via Email, the original file will be placed according to the current configuration settings (i. e. to *Result folder* or to *Processed folder* or to the *Recycle bin*) but the **result** will be placed into *ResendEmail* subfolder of the *Failed folder*. If the Email system is working, and

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[13] In the form of a small text file

there is a problem with sending the particular file (e g. it is too big), PDF Server will send a notification to the user via Email as well.

Setting Email Authorization Options

To specify a list of authorized Email addresses and/or domains, press the **Email Authorization** button in the program main window (see Fig. 2) — the **Email Authorization Settings** dialog opens (Fig. 20).

The dialog contains 2 lists — **Rejected Email Addresses** and **Allowed Email Addresses**.

Both lists are empty when program runs first time after installation.

If the **Allowed Email Addresses** list is empty and if the current configuration has **Use Email Authorization** check box selected (see Fig. 13) then PDF Server does not process any documents sent to it via Email.

To add an Email addresses to the **Allowed Email Addresses** list, enter the address into the **Email** edit box and press the **Add** button.

To add a domain name to the **Allowed Email Addresses** list, enter the domain name preceded by the asterisk and @ sign into the **Email** edit box and press the **Add** button (e. g. to add `my.com` domain you should enter `*@my.com`).

If PDF Server receives a message from an Email address, not specified in the **Allowed Email Addresses** it automatically sends a reply to the user notifying that the Email address is not authorized and adds the address to the **Rejected Email Addresses** list.
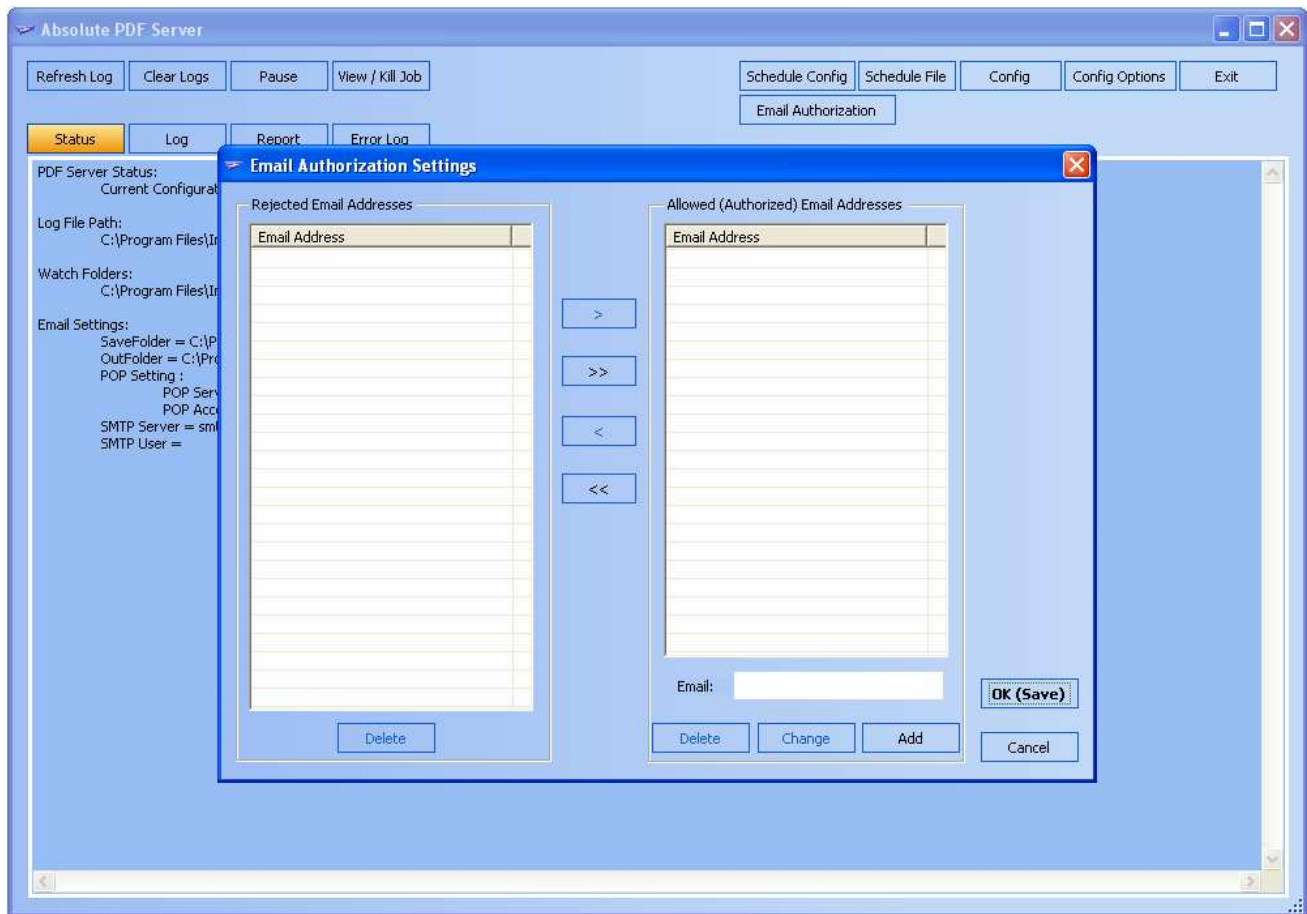
Fig. 19.

It is up to Administrator to decide whether to move an address from the **Rejected Email Addresses** list to **Allowed Email Addresses** list or to delete it (or to leave it in the **Rejected Email Addresses** list for a while).

To move an address from the **Rejected Email Addresses** list to **Allowed Email Addresses** list select the address and press the button with the *greater* sign (">").

To move all address from the **Rejected Email Addresses** list to **Allowed Email Addresses** list press the button with the sign (">>").

To move an address back from the **Allowed Email Addresses** list to **Rejected Email Addresses** list select the address and press the button with the *less* sign ("<").

To move all address from the **Allowed Email Addresses** list to **Rejected Email Addresses** list press the button with the sign ("<<").

To delete an address from a list select the address and press the corresponding **Delete** button.

To change an address in the **Allowed Email Addresses** list, select the address, change its name in the Email edit box and press the **Change** button

Investintech.com Inc. PDF Server Product command line run

The PDF Server products can be run from command line:

`PDFServer.exe /Start` — standard PDF Server regime

`PDFServer.exe /Minimized` — PDF Server main window is minimized

`PDFServer.exe /ConigfileName` —PDF Server will run with `ConigfileName` configuration file as a current configuration file

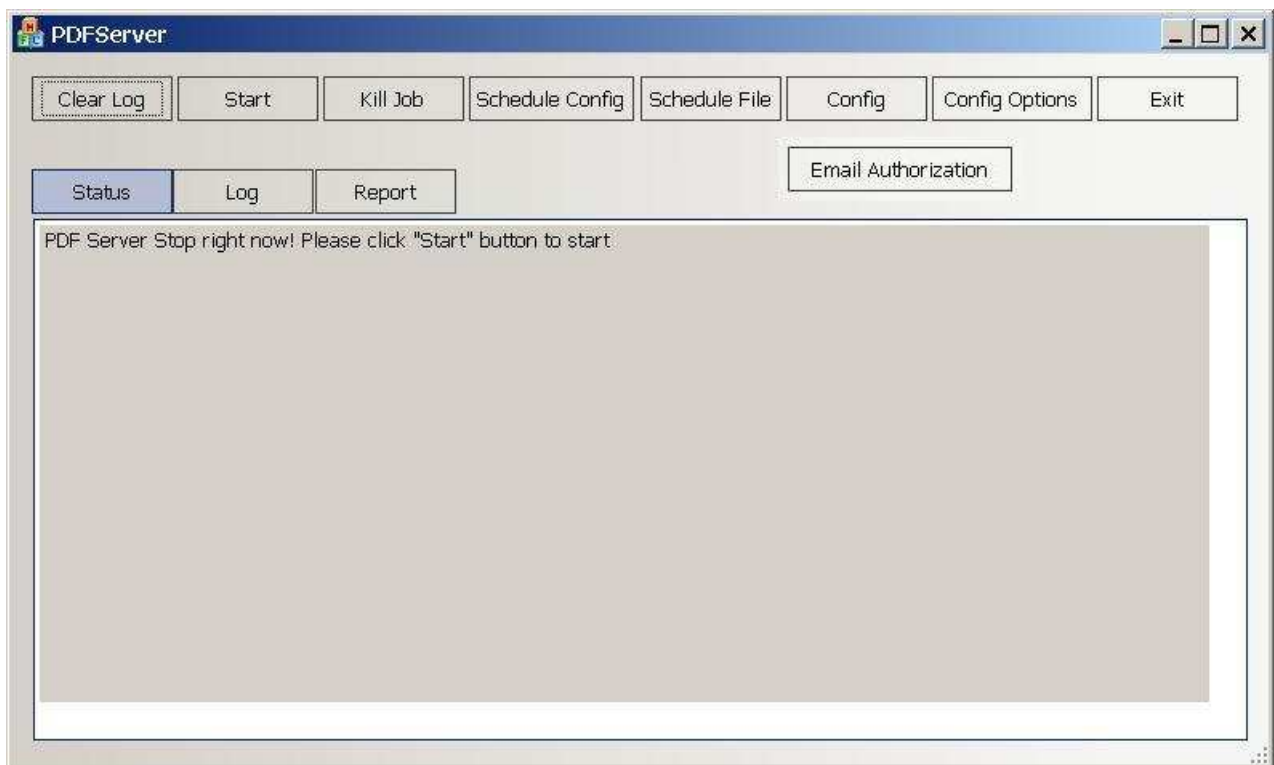`PDFServer.exe /Stop` —PDF Server will run but no file will be processed until Start button is pressed (Fig. 21)

Fig. 20.

Investintech.com Inc. PDF Server Product Installation

To start the installation, run the installation executable (InstallAbsolutePDFServer.exe / InstallAble2ExtractServer.exe / InstallSonicPDFServer.exe) and follow the standard installation instructions (see Fig. 22).

On the 2nd step you will be asked where the server program should be installed (see Fig. 23). It is recommended to keep the default path, offered by the program.
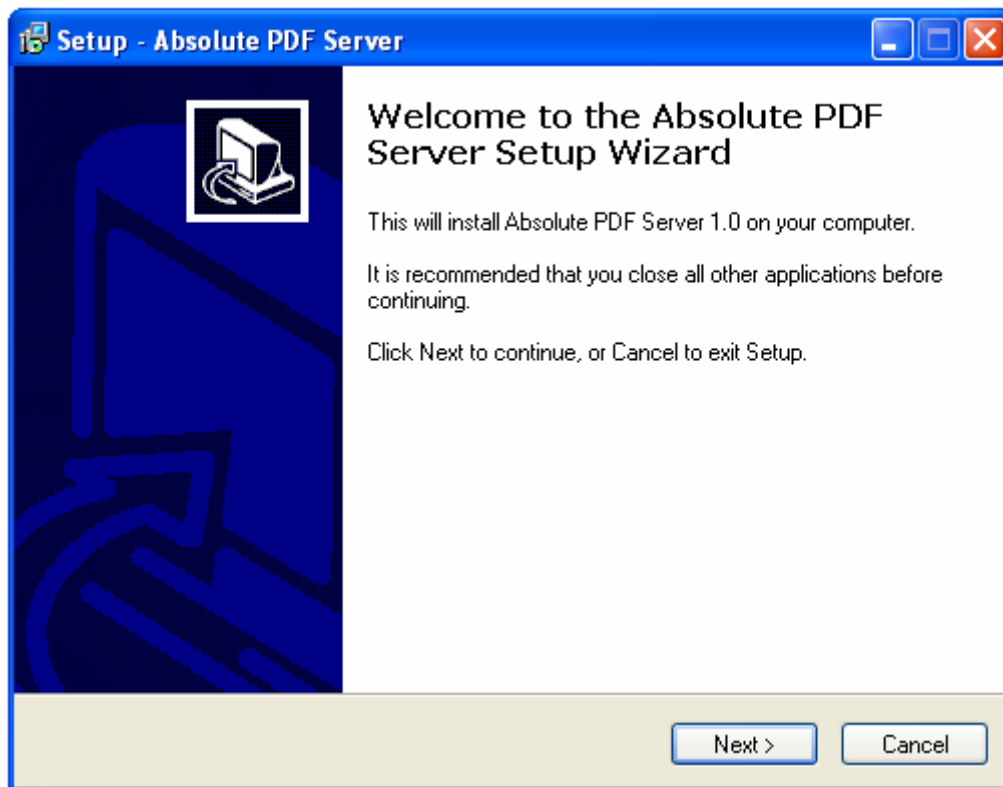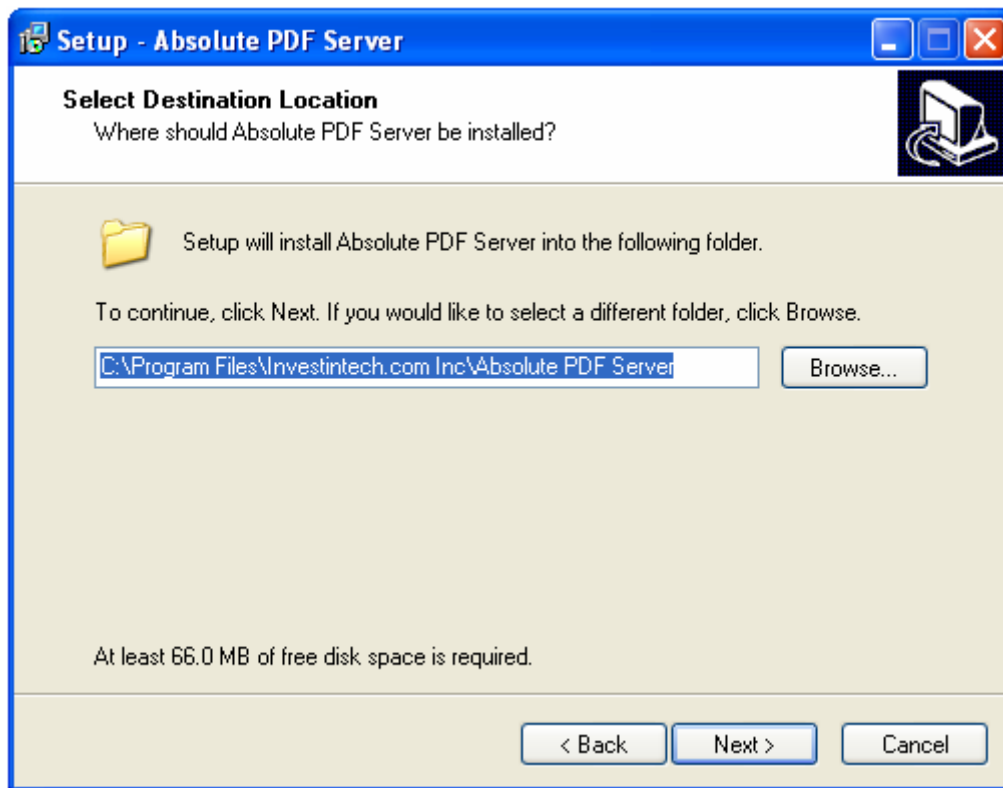
Fig. 21.

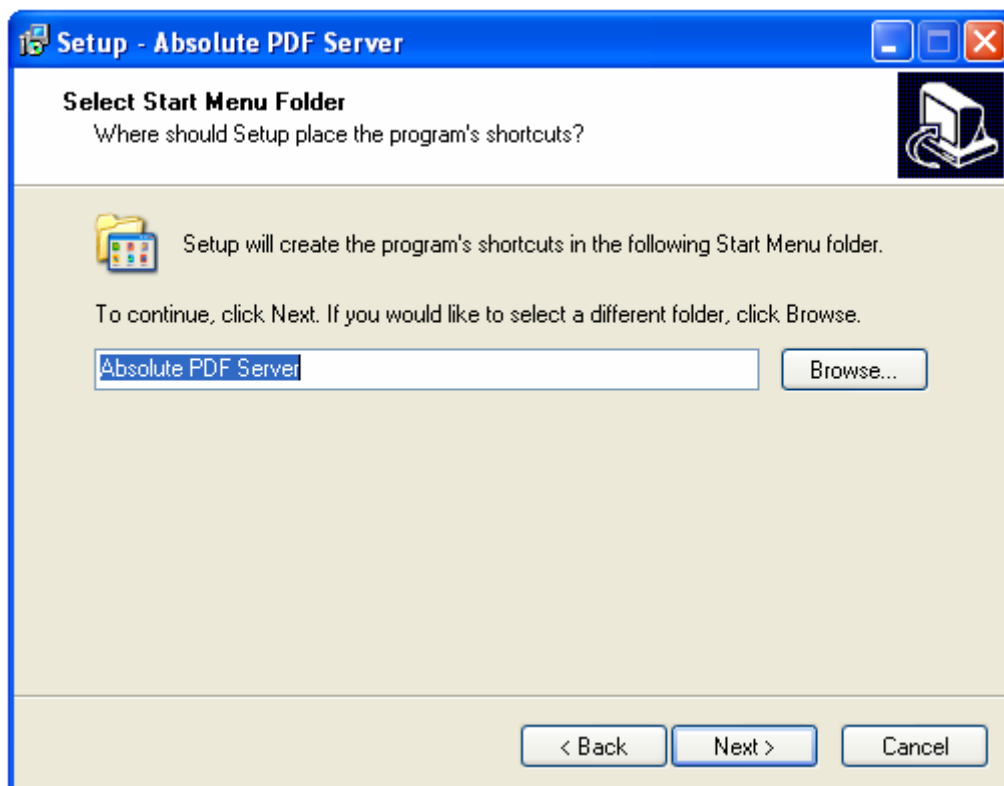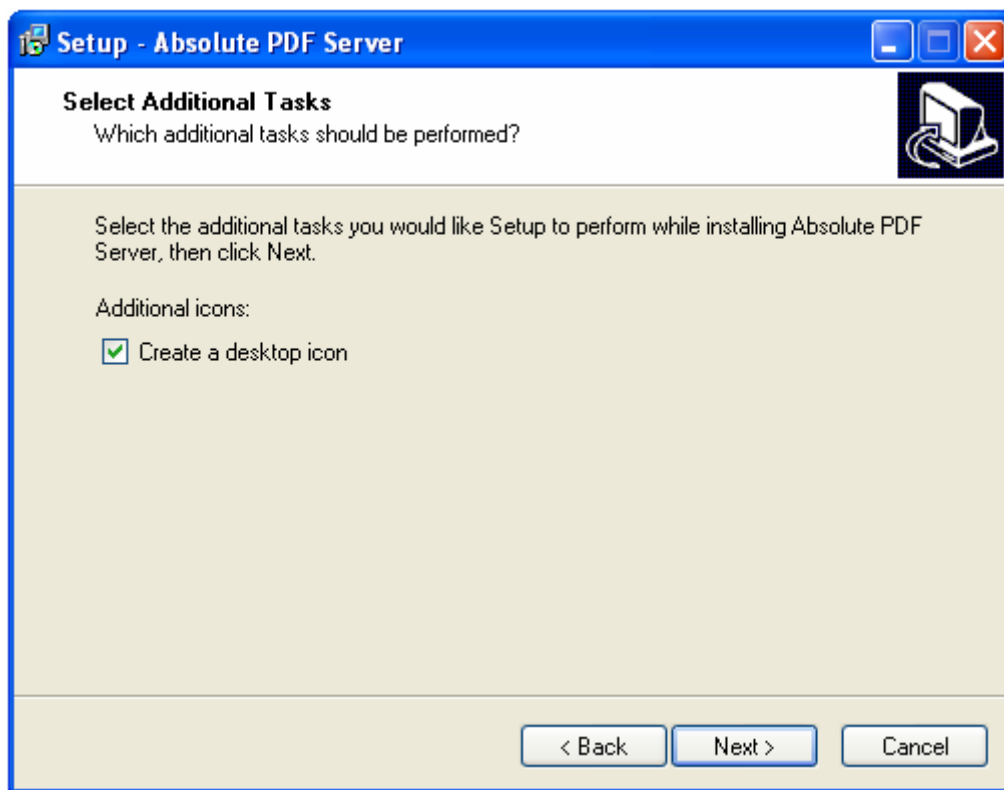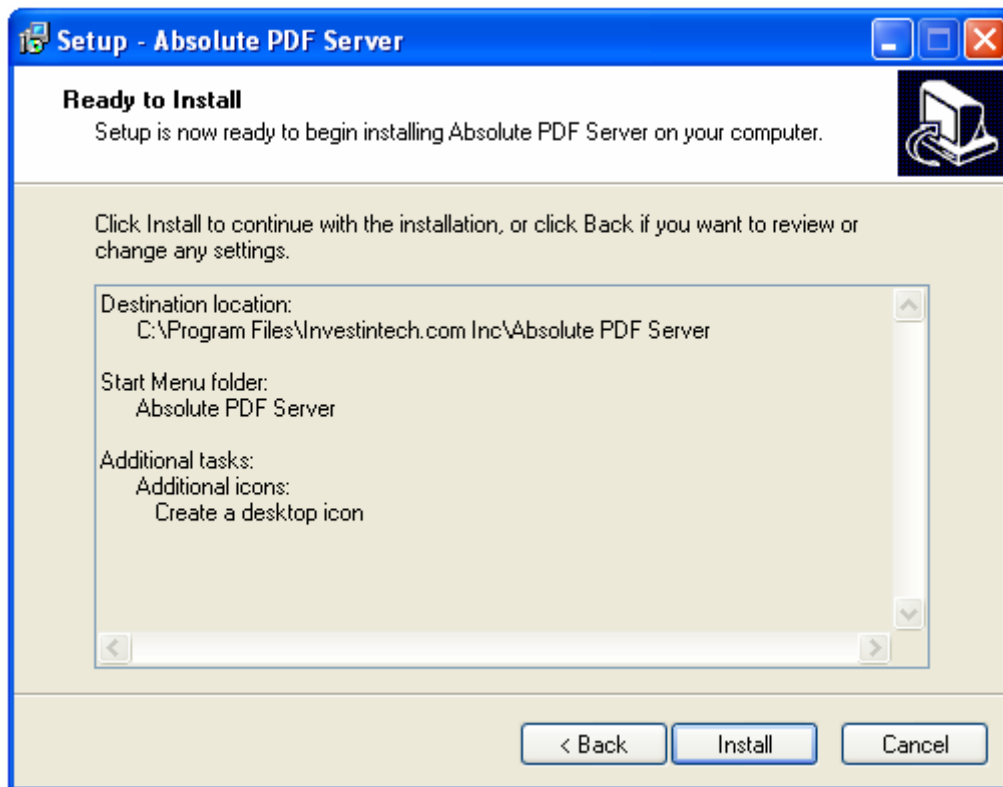**Fig. 22.**
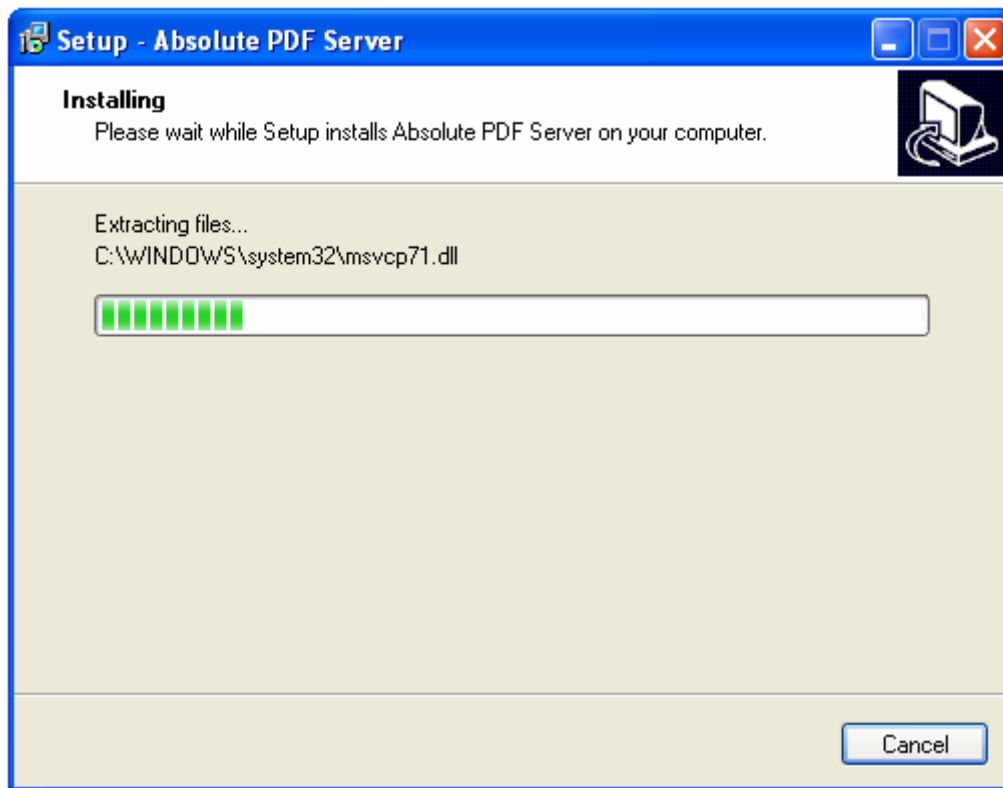
Fig. 24.

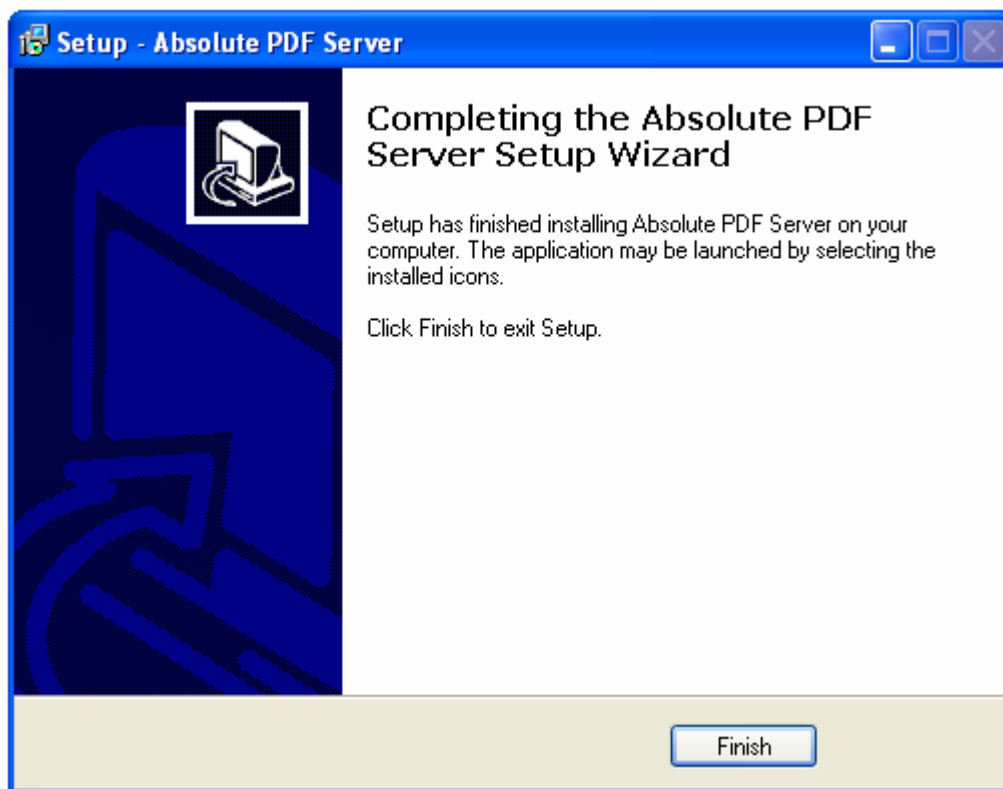**Fig. 25.**

Fig. 26.

Fig. 27.

Fig. 28.

Installation program will place the PDF Server files in the following folders:

installation folder (*C:\Program Files\Investintech.com Inc\Absolute PDF Server* by default for Absolute PDF Server)

[SysFolder]\Absolute PDF Server (say *C:\Windows\System32\ Absolute PDF Server*) folder.

Some information will be also added to the Registry.

To uninstall Investintech.com Inc. PDF Server Products, select **Programs>Absolute PDF Server>Uninstall** (or analog for Able2Extract and Sonic PDF Server products) command in Widows Main menu.