AUTODOC HSE

Reference
Manual

AutoDoc HSE

Reference Manual

Streamline
SOFTWARE

150 Davey St • Hobart • Tasmania 7000 • Australia
info@streamlinesoftware.net
www.streamlinesoftware.net

Version 2.283

Due to AutoDoc HSE being a Windows®-based application, frequent reference to Microsoft® and its products is made in this manual (for example, Microsoft® Fax, Microsoft® WordPad, Outlook®, Word®, Excel®, and various Windows® operating platforms), as both examples and system requirements. 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. No implication of affiliation is intended.

This document has 174 pages. Please consider the environment before printing.

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

AutoDoc HSE

Logs, extras, system files, help & licence

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

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

- The AutoDoc HSE log

- AutoDoc HSE client viewers

- AutoDoc HSE PDF Printer/Scanner

- Creating a "mailback" PDF converter

- Using overlays

- System files

- Help & licence

But wait, there's more...

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

- The main log – which is part of the AutoDoc HSE application, and lists all jobs processed by AutoDoc HSE.

- AutoDoc HSE client viewers – which are separate applications which allow individual users to view a log record of their own jobs, and also provide the following functionality:

  - A PDF converter (referred to as the AutoDoc HSE PDF printer) – allowing documents to be converted to PDF and placed in a virtual 'output tray' for manual collection.

  - A PDF scanner – allowing image files to be converted to PDF and placed in the virtual output tray.

The AutoDoc HSE main log

The main log is accessible via the *Log* button on the AutoDoc HSE home screen:
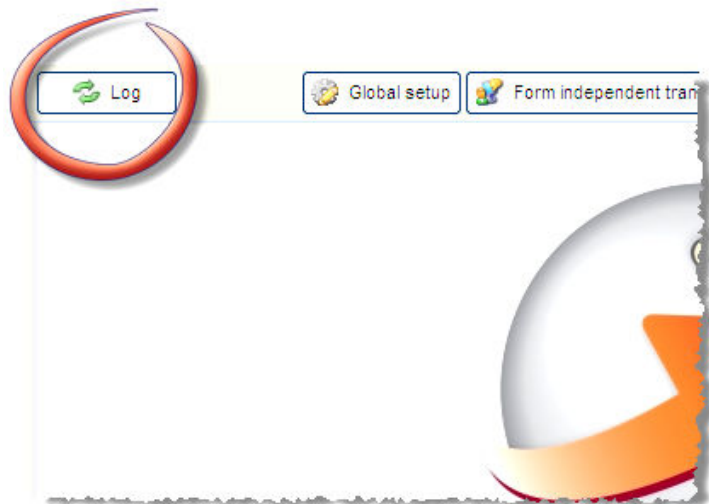
The AutoDoc HSE log lists every document sent to AutoDoc HSE for which AutoDoc HSE has attempted to produce output (e-mailed, faxed, archived, SMS messaged, or printed).

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

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

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

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

- A unique e-mail address

- A unique fax number

- A unique SMS number

- A unique archive filename/path

- A unique printer driver (for print routing)

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

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

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

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

- Archiving to two file paths

- Exception printing set to print to a HP LaserJet

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

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

The following nine records would be entered in the log:

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

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

- Two archive records

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

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

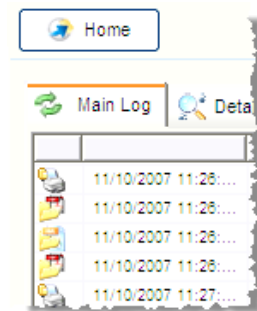Note that any errors that occur are also reported in the log.

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

There are three tabs within the log view:

- Main log

- Detailed log

- Colours/words

Main log

The main log displays the deliveries, and any errors encountered, by AutoDoc HSE:

Some useful features of the log include:

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

- Any record in the log which has stored content associated, provides a link to that stored content. Double-click on the log record to launch the stored content (for example, double-clicking on an archive record will open the PDF file for viewing). Note that you are unable to open document content for records that have been cleared from client viewers (see page 148) by the users who created the jobs.

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

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

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

Control Name	Control Description
Clear Log	This button clears all records from the main log. You will be prompted to confirm your choice, and given the opportunity to save a copy of the current log (see the section on the "HSELog" system folder, on page 159, for more information on log files).
Delivery type	This column displays the nature of the record, via an icon: = a fax = an e-mail sent to the e-mail service = an SMS e-mailed to the SMS service = an archived PDF file = an archived XML file = a job redirected to a non-AutoDoc HSE printer = a job converted to PDF-and placed in the output tray of the AutoDoc HSE client = indicates that a job included a textual command form number, but no delivery was produced. Under this scenario, the print job is not converted to PDF either. = an error. Clicking on this column's heading area results in the log being sorted in its default sort order. Where errors are reported, more detail is available in the *E-Mail/ Fax number/ Path/ Printer* and *Status* columns.
Date/Time	This column displays the date/time stamp applicable to the processing of the job.

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

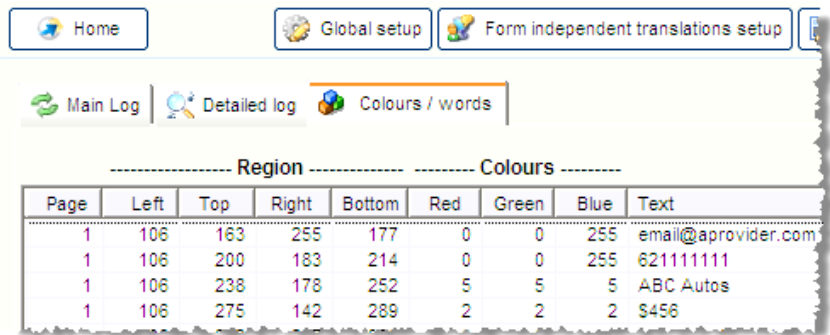|	
	- Originating application and document filename and Windows username and domain/PC name (in the case of an archive operation). If a subject has been specified for the PDF in the form's *Subject* control, this is used as the subject for the log. - Originating application and document filename and Windows username and domain/PC name (in the case of a print job) - Originating application and document filename (in the case of a PDF printer conversion)
Attn	This column displays the name of the recipient to whom a fax is directed for attention. This corresponds to the value specified in the *Attn* text control in AutoDoc HSE's form setup Fax tab.
Status	This column displays the progress of the delivery. Completed AutoDoc HSE jobs are specified via one of the following: `Saved` (for an archive operation) `Sent to printer` (for a print job) `Sent to Fax Server` (for a fax job) `Sent to E-Mail client` (for an e-mail job) `Sent to SMS client` (for an SMS job) `Stored` (for a PDF Printer conversion) `Failed` (or blank) indicates an error. `Nothing` indicates a job included a textual command form number, but no delivery was produced. Under this scenario, the print job is not converted to PDF either.
Computer Name	This column displays the name of the PC which sent the print job to AutoDoc HSE (as defined in the workstation's property settings).
E-mails, SMS, Faxes, Prints, Archives, XML, Errors	These controls display the number of records displayed in the log for each delivery method (as well as any errors logged). *Archives* refers to PDF archive, while *XML* refers to XML archives.

Detailed log

The detailed log displays a history of the key processing steps performed by AutoDoc HSE for a print job. This information is very useful for troubleshooting purposes, and can also provide valuable information for support requests. The detailed log only lists the detail for jobs that have been processed since the AutoDoc HSE application was opened. Once the AutoDoc HSE application is closed and reopened, the detailed log is cleared.
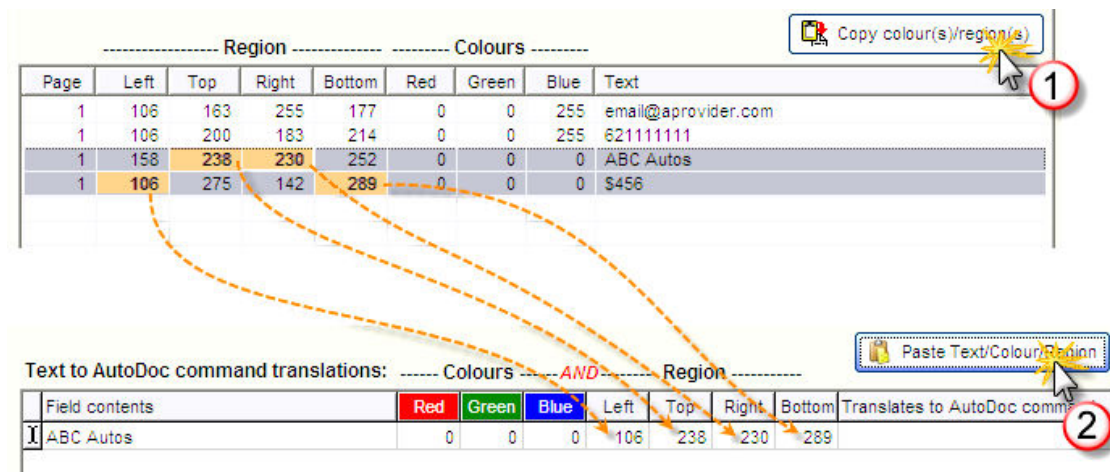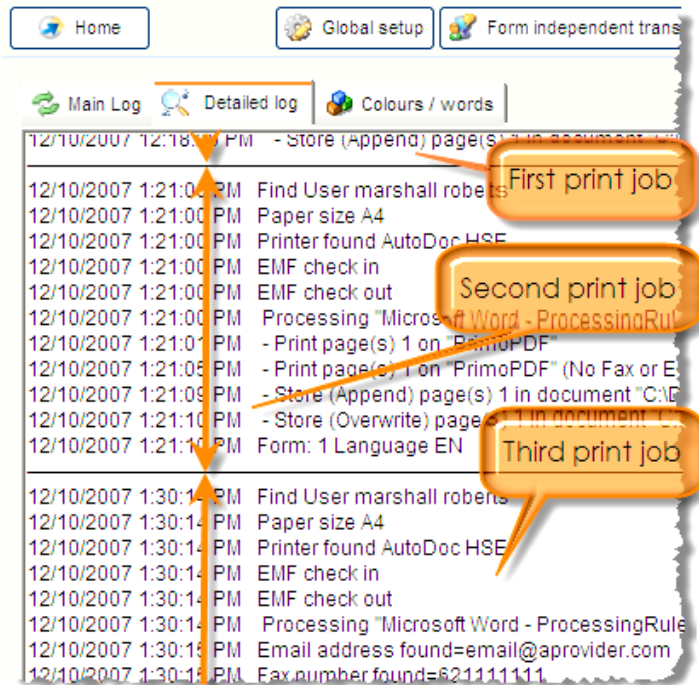
Colours / words

This tab of the log aids in troubleshooting and configuration, by displaying the text strings located in a print job, together with their colours and regions.

Whereas the main log displays all the print jobs processed by AutoDoc HSE, and the detailed log displays all the detail of jobs processed since the application was opened, the colours/words log only displays the detail from the most recent entry in the detailed log.

The *Copy colour(s)/region(s)* button is used to copy information from this log to the clipboard, to allow the information to be pasted into the Variables tab and/or form independent translations view. This button will copy the information from the highlighted record (or records, if multiples have been selected by using CTRL+click or SHIFT+click). In the case of selecting multiple regions, the resultant pasted region is a single, combined region comprised of the lowest of the *Left* and *Top* values, and the highest of the *Right* and *Bottom* values, and the first text value of the rows selected.

FIGURE 23 – showing a copy/paste operation involving regions and text copied from the colours/word log, into the form independent translations view. Note that regions will only be included in a copy/paste operation if the RGB values are 0,0,0.

If using regions for configuring translations or variables (for example, in the case where RGB colour settings are not available), the following process is recommended:

1. Print the document to AutoDoc HSE under a form which will produce a PDF (use a test configuration which doesn't deliver the document externally).

2. Move to the Log view (go to the home page and then use the *Log* button to open the log view), and then to the Colours / Words tab of the log. This area displays the text strings found in the print job, together with their colours and regions. Depending on whether the strings are identified in a fashion which enables you to isolate them as you wish, you may need to experiment by rearranging your document content (for example, by separating text strings onto different lines to prevent them merging).

3. Use the copy/paste method depicted in Figure 23 above to copy and paste the desired values.

Extras

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

Creating a 'mailback' PDF converter

AutoDoc HSE has a PDF printer which can be used as a PDF converter (see the "PDF Printer" section starting on page 149).

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

FIGURE 24 - a user creates a document, prints it with a mailback printer, which converts it to PDF and sends it via e-mail back to the user who printed the document.

To achieve this setup, you would perform the following steps:

1. Using AutoDoc HSE's global setup Printer tab, create an additional shared printer (with a name that will be meaningful to your users):

2. Using the Windows printer list, edit the printer's properties to add some indicators (see page 110 for an introduction to indicators). In this case, we would add indicators which are textual commands specified in the extra mailback printer's comments. For example, adding the text `23` to the comments of the mailback printer will instruct the printer to process the job under form 23. You can also add e-mail addresses and fax numbers (separated by a space character). System variables can also be used:
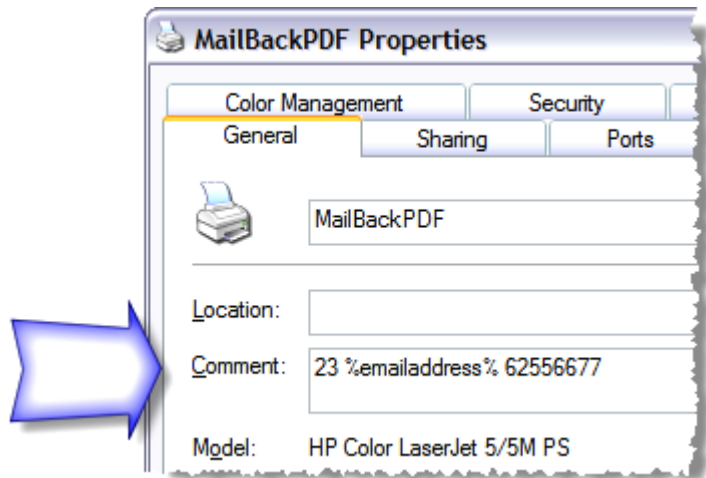
FIGURE 25 - an indicator in the mailback printer's *Comment* property. This indicator would instruct the printer to use AutoDoc HSE form 23 and send a fax to 62556677. Note also that an e-mail will be sent, since the user-specific system variable will be populated by the AutoDoc HSE user's e-mail address (as specified in the global setup Users tab). By using the %emailaddress% variable, which refers to the e-mail address of the person who created the e-mail, we have a means of sending the e-mail back to the creator, regardless of who the creator is.

3. If desired, you could configure form 23 with appropriate information for a mailback function. It is important that the e-mail should be sent under the CREATOR/OWNER option, to ensure the e-mail address of the creator is used in the %emailaddress% indicator (see Figure 26 on page 156).

Provided that the users printing to the AutoDoc HSE mailback printer have already been configured as AutoDoc HSE users, mailback setup is complete. Upon printing to the mailback printer, users would receive an e-mail like the one below, and a fax would be sent to 62556677. If such a 'hard coded' fax number was not required, the fax number indicator would not be added, or alternatively, the %faxnumber% variable could be used.
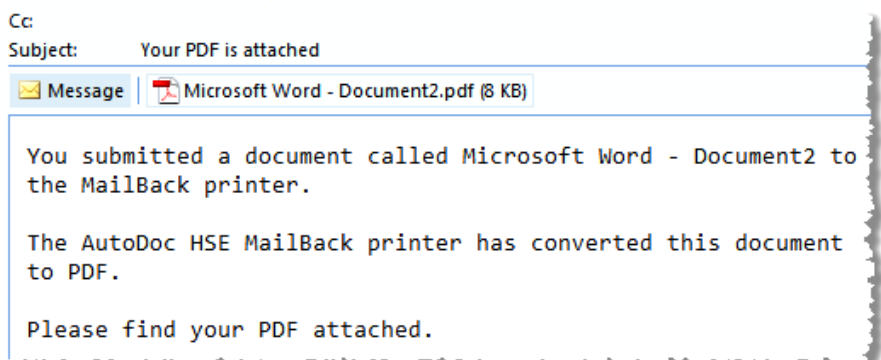
FIGURE 26 – showing areas of the e-mail tab that have been configured especially for a mailback situation.

Note that, regardless of your version of AutoDoc HSE, you can add indicators to any AutoDoc HSE virtual printer. This means you can add a mailback (and faxback) function to your AutoDoc HSE printer (even if you only have one), if it suits your purposes to have a copy of all outgoing e-mail and fax deliveries sent to the creator. For the purposes of a dedicated PDF converter (with no delivery), the example above used a *separate* AutoDoc HSE printer.

Overlays

Overlays behave in a similar fashion as letterheads, but because overlays are a document-based command, you can potentially specify a different overlay for every page of a document. Also, overlays can be 'stacked' on top of one another in a 'transparency' fashion, so that, for example, two overlays specified on one page of a document are merged, together with the source page itself and any letterhead associated with it, into one PDF output page which features all the information from those 4 sources (see Figure 27).

Note that the transparency effect can only be achieved when the PDF files used as overlays have transparency enabled.
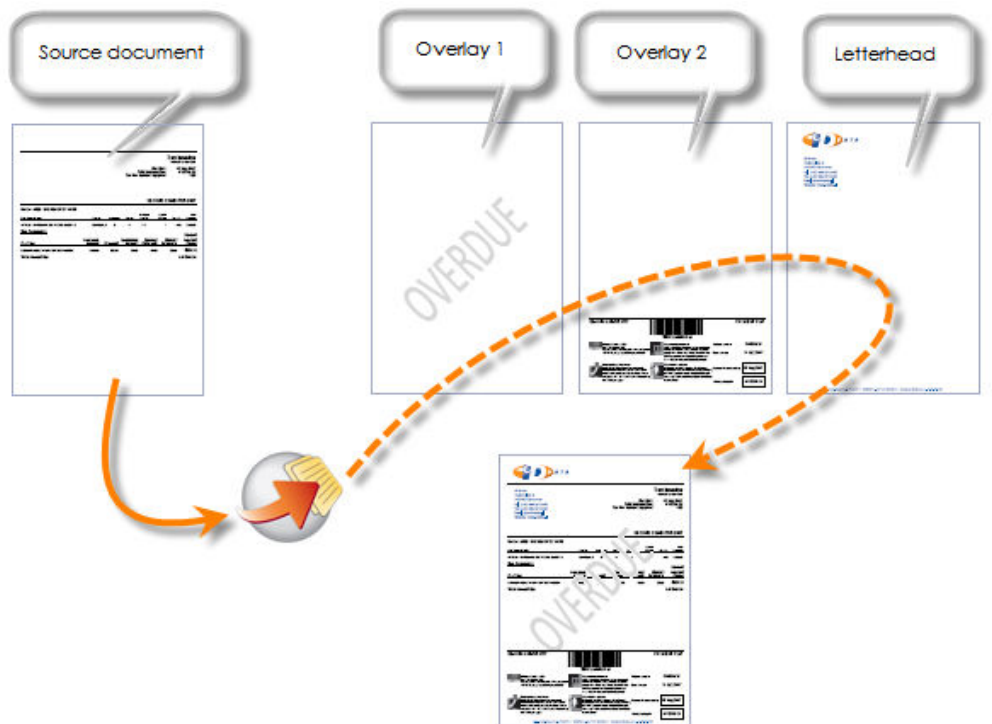
FIGURE 27 - showing AutoDoc HSE using overlays and a letterhead to produce final output combining all of these elements.

System files

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

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

The files that reside in the AutoDoc HSE directory are:

- `AutoDocHSE.exe` - the AutoDoc HSE application itself.

- `AutoDocHSEDelete.exe` – the application responsible for uninstalling AutoDoc HSE.

- `AutoDocHSEForm.ini` – contains system initialisation settings relevant to the current AutoDoc HSE release.

- `AutoDocHSEPrintTray.exe` – an application involved in the printing process.