AutoDoc HSE

Quick Start Guide

AutoDoc HSE

Quick Start Guide

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Version 3.324

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. Similarly, since AutoDoc HSE operates as a peripheral tool, it can interact with a wide variety of third-party products. It is acknowledged that where such products are mentioned by name, those names may be registered trademarks. No implication of affiliation is intended.

While we endeavour to provide high quality, up-to-date documentation for our products, please be aware that we regularly improve our software according to the expressed needs of our customers. As such, functionality of the software may differ from that described in our documentation. As always, we recommend that you thoroughly test your chosen configuration to ensure it meets your needs, prior to employing the configuration in a production environment.

This document has 40 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.

Table of Contents

What do you want to do?

AutoDoc HSE is packed with features. This section is designed to map out the kinds of things you can get the application to do for you, so you can choose what it is you want to do, and do it quickly.

It is important to remember that when you open the AutoDoc HSE application, you are essentially looking at a window that contains a multitude of settings which control AutoDoc HSE's features, rather than looking at a window that does something while you're looking at it. The AutoDoc HSE application *configures* the AutoDoc HSE printer, that's all. This guide shows you some quick configurations to get started.

Note that this document is a quick guide only. For details on all the features AutoDoc HSE offers, please consult the Reference Manual (which can be accessed from within the Help/Licence area of the AutoDoc HSE application).
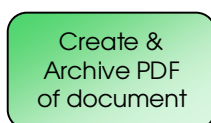
AutoDoc HSE's core functions

When you print a document to the AutoDoc HSE printer, it can:
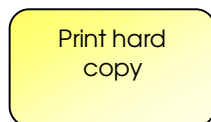
|	
Print hard copy	Route the document to a specific printer (or printers) for hard copy printing.
Create & Email a PDF of document	Create and email a PDF version of the document.
Create & Archive PDF of document	Create and save a PDF or XML version of the document to a specific location ('archive'). In this guide we focus on the PDF option.
Fax the document	Fax the document.

In addition, while archiving, emailing, and faxing, AutoDoc HSE can, optionally:
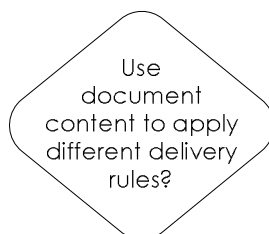
Use document content to apply different delivery rules?	Recognise the document's content to apply context sensitive delivery. For example, if you are printing an invoice with a heading which reads "overdue invoice", AutoDoc HSE can apply predefined delivery rules you have set up specifically for overdue invoices.

Another important feature is the ability to use the document's content to dynamically create text for use in the email and/or fax, and/or archive file path/filename. For example, if you are printing an invoice for Petra Jones, AutoDoc HSE can create an email which begins with "Dear Petra Jones". If you opt to produce an email, fax, or archive in the following exercises, you will see this feature in action.

Choose your outcome

This quick start guide tells you what you need to do to achieve any of the outcomes listed. Please decide on your desired outcome(s):

Print hard copy	Create & Email a PDF of document	Create & Archive PDF of document	Fax the document

Once you have decided which one of these outcomes, or combination of outcomes, you want to achieve by using this guide, you only need to perform the steps associated with your chosen outcome(s). Each section of this guide is devoted to a broad step associated with using AutoDoc HSE. Depending on the outcome(s) you choose, you may be able to skip entire sections.

Each section begins by listing the outcomes to which the section applies – if your outcome(s) is/are not listed, you can skip that section. Each section (like this one) also ends with a 'What next?' heading, which tells you which section you need to complete next.

You can, of course, choose all four outcomes.

> Note that, in the exercises in this guide, it is assumed that you will want a hard copy produced for any job you process with AutoDoc HSE. That is, by default, the 'Print hard copy' outcome has been chosen for you. If you specifically *don't* want the hard copy outcome, you can turn this feature off (you will be given the option to do this in the next section of this guide).

What next?

Regardless of which outcome you have chosen, you will need to perform the tasks detailed in the next section, "Install".

Installation & Initial Configuration

You need to perform this step for *any* of the outcomes in this quick guide:

Print hard copy	Create & Email a PDF of document	Create & Archive PDF of document	Fax the document

Installing AutoDoc HSE is a quick and simple process, and initial configuration steps help ensure hassle-free use. Also included in this section is the restoration of a pre-prepared AutoDoc HSE configuration which has been purpose built to work in conjunction with this guide.

Before you start

There are a number of minimum system requirements for successful AutoDoc HSE installation:

- One of Windows NT4 Workstation, Windows 2000 Professional, Windows 2000 Server, Windows 2003 Server, Windows XP Professional, Windows XP Home, or Windows Vista operating systems.

- If fax functionality is required, Microsoft Fax must be installed, configured and running on the local machine or server (depending on your intended use). An external phone line is also required for sending faxes with Microsoft Fax. These requirements (as well as fax gateway alternatives to Microsoft Fax) are discussed in more detail in Section 3, "Setting up Microsoft® Fax", starting on page 15.

- I If SMTP e-mail functionality is required of AutoDoc HSE, outgoing SMTP mail server settings will be needed for post-installation configuration. If MAPI e-mail functionality is required, a MAPI compatible e-mail client (such as Microsoft Outlook) is required.

- A minimum of 60 MB of free hard drive space.

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

Installation

AutoDoc HSE is available for installation from two sources:

- An installation disk

- A downloadable file available from the Streamline Software website, www.streamlinesoftware.net

Running from disk

Perform the following steps to run the installation from disk:

1. Insert the disk into your CD/DVD drive.

2. The installation program should run automatically, in which case you should now move to the instructions in the "Configuring the AutoDoc HSE Setup Wizard" section below. If your 'auto run' setting is disabled, you will need to perform step 3 to start the installation manually.

3. Browse to your CD/DVD drive (often designated as `D:\` within Windows-based applications) and launch the file `setup.exe`.
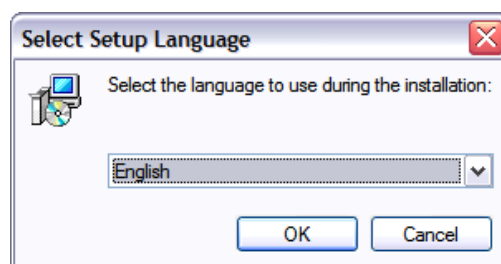
Running from a Downloaded File

Perform the following steps to run the installation from a downloaded file:
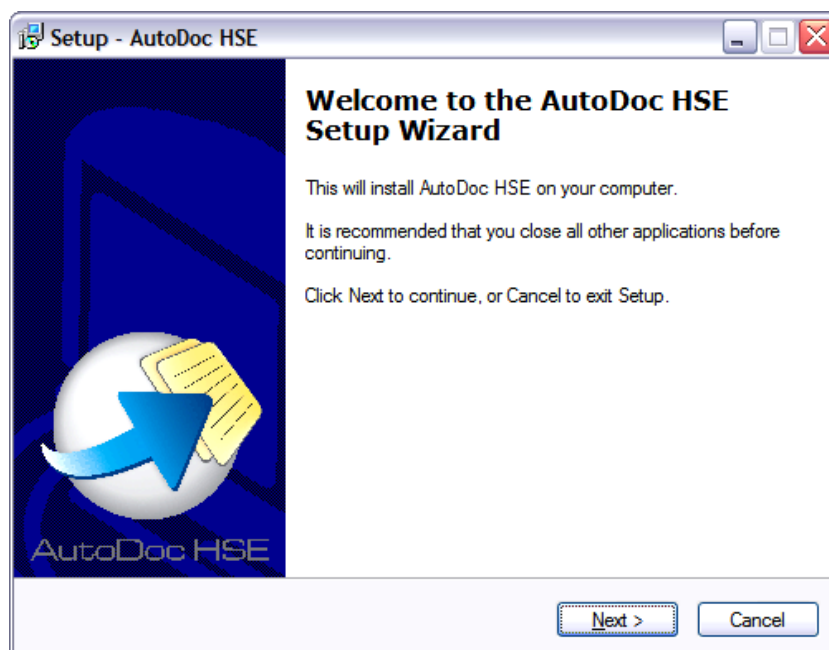
1. Browse to the location to which the `setup.exe` file was downloaded.

2. Double-click on the file to launch the installation.

Configuring the AutoDoc HSE Setup Wizard

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


1. Select your language and click *OK* to continue.

2. Click the *Next* button to continue.

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

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

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

6. Use the checkboxes to specify whether the Wizard should create a desktop icon and/or a quick launch icon, then click the *Next* button.

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

8. The setup wizard advises when the wizard component of the installation is complete. Clear the *Launch...* checkboxes for the documentation items, but leave the *Launch AutoDoc HSE* checkbox checked.

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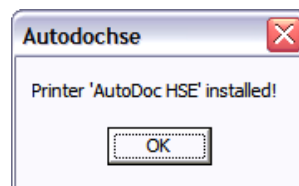

The next steps in this section assume you are a new user to AutoDoc HSE.

If this is not the case, you should backup your existing configuration to a secure location, using the *Backup* button, before completing steps 10 and 12.

10. You do not need to register for the 30-day trial to complete the steps in this guide (but if you do, the "trial" watermarks will be removed from your AutoDoc HSE outputs). If you would like to register for the trial, follow the information presented on screen, and in the subsequent e-mail that will be sent to you, then continue with the steps below.

11. Navigate to the Global setup area, then the Backup/Restore tab, and click on the *Restore previously saved settings* button:
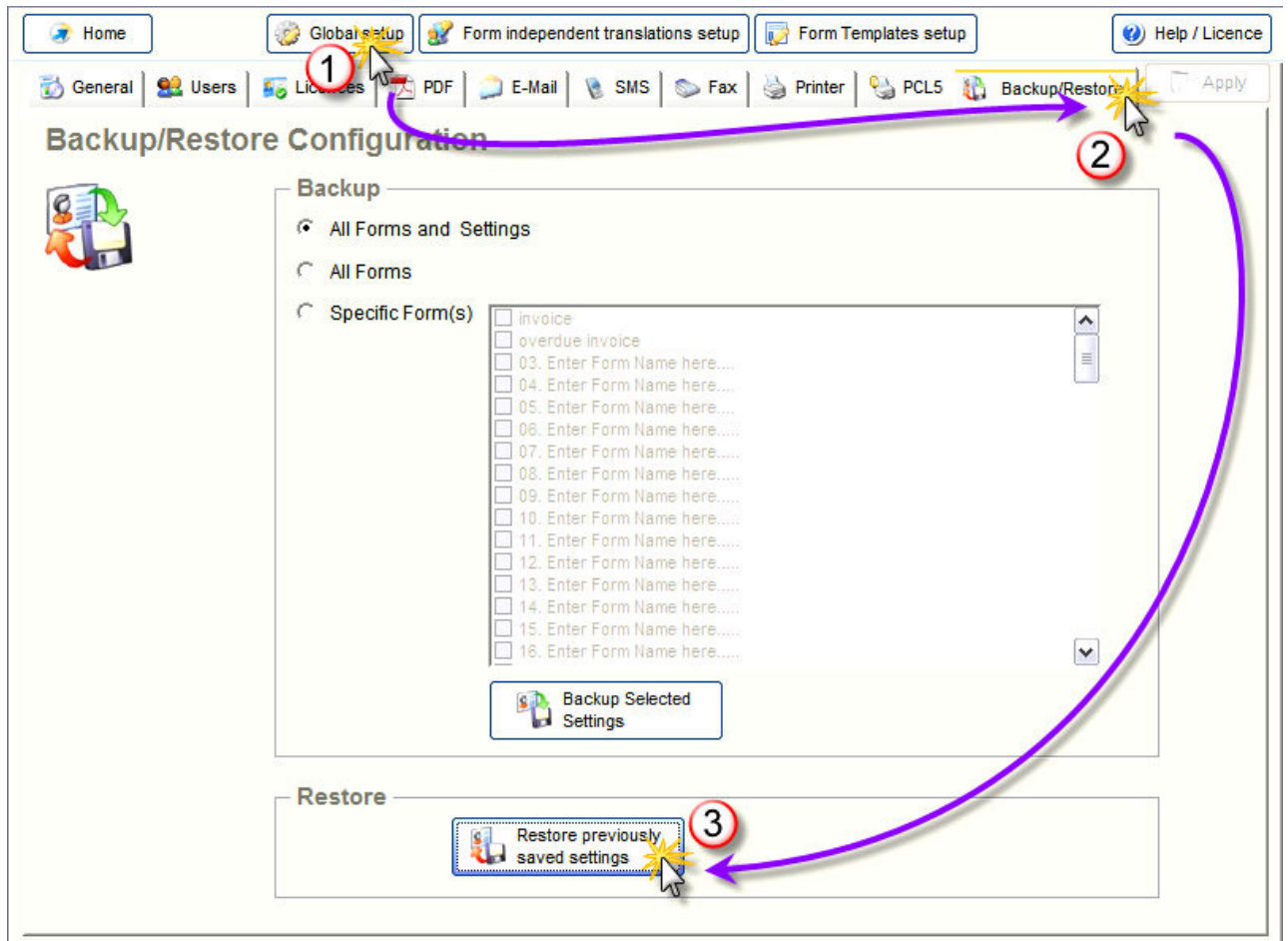
12. Select the file named `Quick Start Config.BCK` and, click on the *Open* button, and confirm:
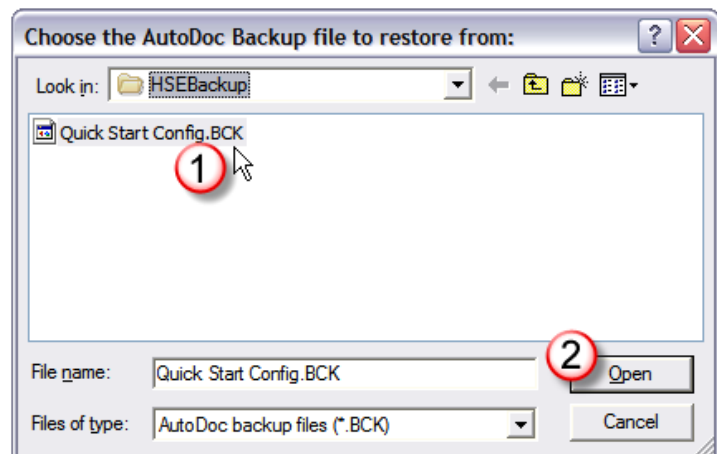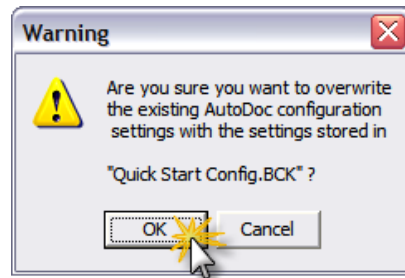
If it is convenient for you to:

- use AutoDoc HSE with local resources only (that is, no network printers or files on network drives) for the purposes of completing this quick start guide, *and*

- you also want to see AutoDoc HSE produce hard copy output

...you can move to the "What next?" heading of this section. If either of the above is not convenient for you, please continue with the steps below.

13. Click the General (leftmost) tab, and complete the *Run as another User Service* controls. Use the drop down *User name* control to choose a user profile which has access to all the network resources you require. Note that if you don't complete this area, AutoDoc HSE will only have access to resources local the machine on which AutoDoc HSE is installed (see the Reference Manual for a more detailed discussion of this area of the software):
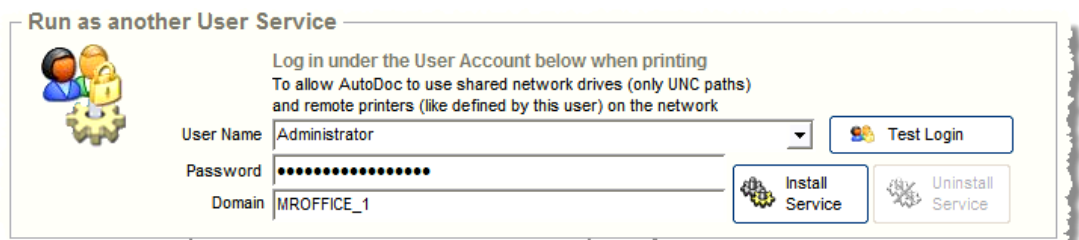
14. Test the login credentials with the *Test Login* button, then click on the *Install Service* button:
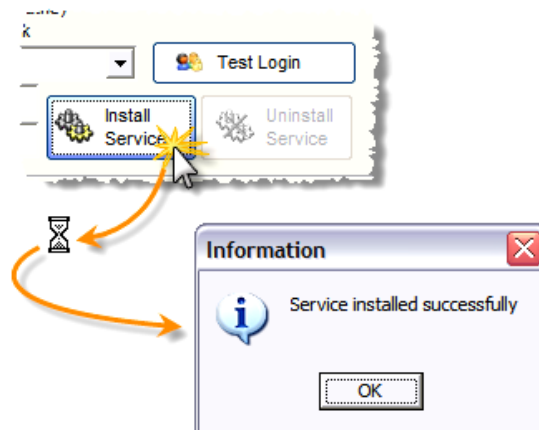
15. Apply your changes using the *Apply* button at the top right corner of the application window:
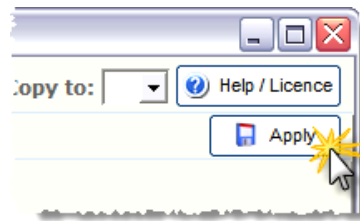

16. If you are planning to perform the quick start processes in this guide from a client machine (that is, one on which the AutoDoc HSE shared printer has been installed), you will also need to run the client viewer. See the "Client setup" section in the Reference Manual for guidance on this step.
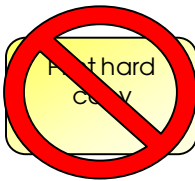
The following steps should only be performed if you specifically *don't* want AutoDoc HSE to produce hard copies. If you do want hard copies, move to the "What next?" heading of this section.

17. Click the *Form Templates setup* button, then move to the *Print* tab:
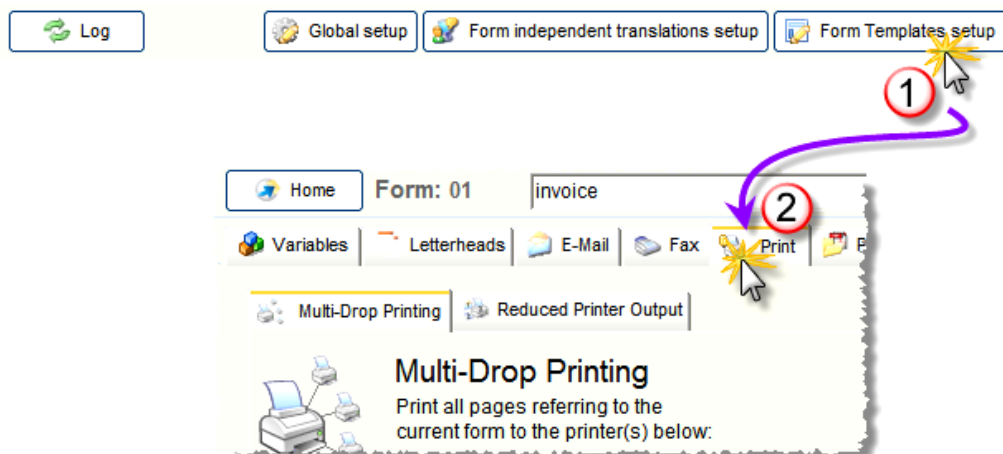
18. Clear the checkbox on the *[Print to User printer #1]* option in the Multi-Drop Printing area, to prevent AutoDoc HSE printing hard copies:
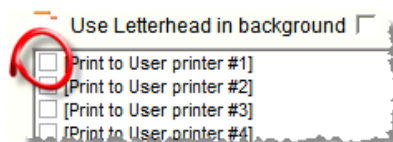
19. Apply your changes using the *Apply* button at the top right corner of the application window:
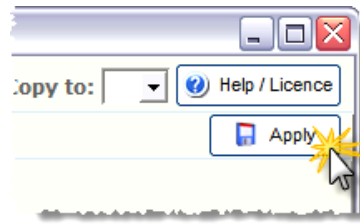
What next?

Your next step depends on what outcome you have chosen:

If your chosen outcome(s) includes faxing, you need to go to Step 3, which starts on page 15.

If your chosen outcome(s) does not include faxing, you can go straight to Step 4, which starts on page 18.

Setting up Microsoft® Fax

This section details setup required to achieve the following outcome:

Fax the
document

AutoDoc HSE can use Microsoft Fax to deliver faxes, or you can opt to sign up for our MessageSaver service to achieve significant savings on your outgoing faxes (please see the Reference Manual for details on setting up other fax services). For the sake of a faster setup, this guide uses Microsoft Fax as the basis for fax deliveries.

Note that under Microsoft Fax you will need a modem and phone line for the fax service. If you do not have a fax-enabled modem and phone line, we suggest that you use MessageSaver if you wish to deliver faxes (one of the benefits of MessageSaver is that it does not require a modem or phone line – your existing internet connection is used for fax deliveries).

Choosing your fax delivery service

Navigate to the Global setup area of the AutoDoc HSE application (you may need to navigate to the Home area if the *Global setup* toolbar button is not available), and then to the Fax tab:
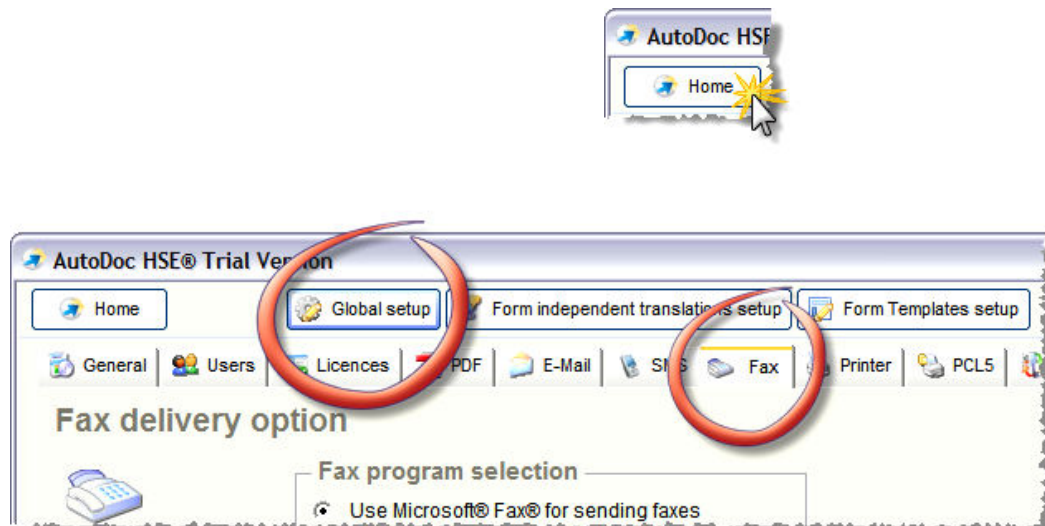
This guide assumes you will use Microsoft Fax for delivering faxes:

The rest of this section relates to the Microsoft Fax option. If you do not have a modem and phone line to use with Microsoft Fax, and you do want to see AutoDoc HSE delivering faxes, we suggest you refer to the Reference Manual (accessible via the Help/Licence tab) for instructions on setting up a different fax service.

Do you already have Microsoft Fax configured?

Microsoft Fax is a standard Windows component, but it may not be installed and configured on your machine yet - you may need to add the Windows component, and enable and configure it.

> Note that if you are intending to use AutoDoc HSE as a shared printer on a server in a network environment, the fax service also needs to be running on the server.

If installed, the fax service appears in your printer list:
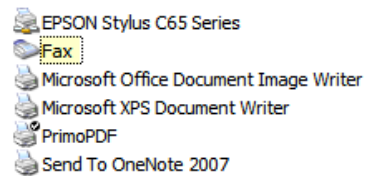
It is also displayed in the Control Panel | Add or Remove Programs | Add/Remove Windows Components list (with the checkbox checked if it is already installed):
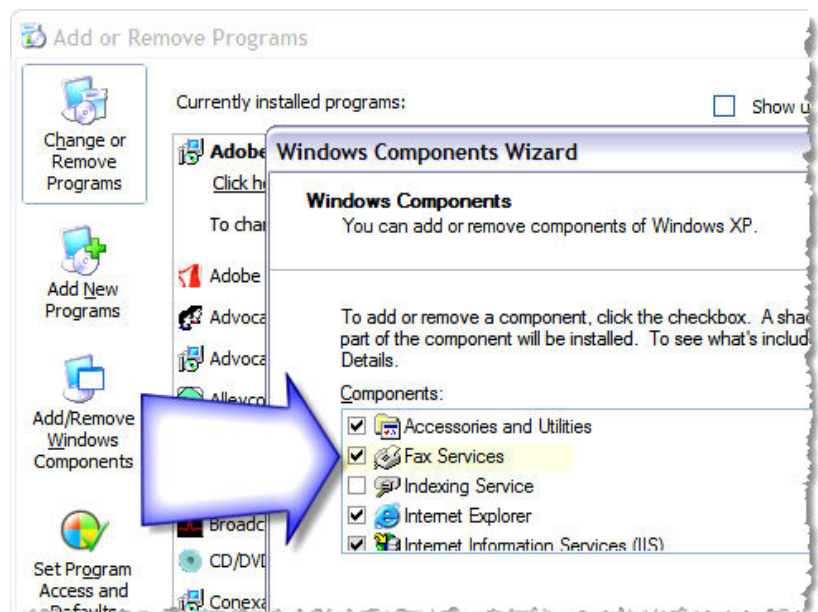
If you don't have Microsoft's fax service installed and configured, please refer to the appropriate Microsoft Knowledgebase article for instructions:

http://support.microsoft.com/ (search for "enable fax service", with your operating system – for example, "enable fax service windows XP").

What next?

Regardless of your chosen outcome(s), your next step is Step 4, which is the section on "Creating AutoDoc HSE's default user", starting on page 18.

Creating AutoDoc HSE's default user

This section details setup required to achieve the following outcomes:

Print hard copy	Create & Email a PDF of document	Create & Archive PDF of document	Fax the document

AutoDoc HSE's "default user" is simply a profile under which documents are delivered when no other user can be associated with a delivery.

The default user

When you print a document to the AutoDoc HSE printer, the Windows username associated with the print job is also sent to AutoDoc HSE. AutoDoc HSE looks for this username in its own list of users, and if it can't find it, it treats the job as belonging to the "default user".

To make the most effective use of this feature, we recommend that the default user profile should contain generic information for you organisation – for example, the phone, fax, and email details could be those of your front desk/reception.

1. Navigate to the Global setup area of the AutoDoc HSE application, and then the Users tab:

The user record displayed is that of the default user.

2. Complete these fields on screen:

Field name	What to enter
Full name	If you are a home user, enter your full name. If you represent an organisation, enter your organisation's name.
Email address	Enter the email address via which you receive emails. If you represent an organisation, enter a generic email address for your organisation (e.g. info@abcelectrical.com).
Office Phone	Enter your phone number.
User Printer #1	Choose a printer to which AutoDoc HSE can direct hard copies. You need not choose a printer if you specifically opted to *not* print hard copies in the last section (step 18 on page 13).

3. Apply your changes by clicking the *Apply* button toward the top right of the view:

You have now completed this section – AutoDoc HSE now has a user profile it can use to handle any jobs which are sent by a user who does not have a specific profile in AutoDoc HSE (which, in this quick guide, will be all the jobs).

What next?

Your next step depends on what outcome you have chosen:

Create & Email a PDF of document

If your chosen outcome(s) includes email, you need to go to Step 5, which starts on page 21.

Create & Archive PDF of document

If your chosen outcome(s) does not include emailing, but does include archiving, you can go straight to Step 6, which starts on page 24.

If your chosen outcome(s) does not include emailing **and** does not include archiving, you can go straight to Step 7, which starts on page 27.

Setting up email

This section details setup required to achieve the following outcomes:

Create &
Email a PDF of
document

AutoDoc HSE has its own, built-in email client, which can send emails using either SMTP or MAPI protocols.

AutoDoc HSE's email client

AutoDoc HSE sends emails with its own email client – that is, it sends outgoing email independently of the usual email applications you may use.

You can elect to use AutoDoc HSE under SMTP or MAPI protocols.

Navigate to the Global Setup area of the AutoDoc HSE application, then the Email tab, and perform the following steps, depending on your preferred email protocol (SMTP or MAPI).
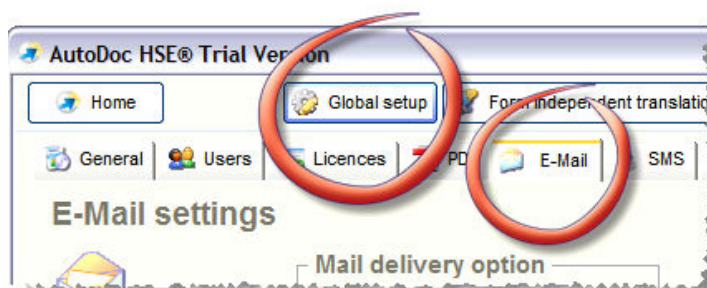
SMTP email configuration

1. Choose the *Use SMTP as Default for sending E-Mail* radio button:

2. Complete the following fields:

Field name	What to enter
SMTP Host	The host name (e.g. `mail.yourisp.com`) or IP address of your ISP's SMTP server.
Send a test email to	Your own email address, or an email address that you can easily check for a test message.

3. Click the *Test Connection* button to check your email settings.
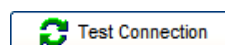
4. If you are advised that your test was successful (this may take several seconds), check your usual email client for new mail. If the test is not successful, you may need to complete your SMTP User ID and Password, and check with your system administrator that port 25 is the correct SMTP port to use.

5. Apply your changes.

For SMTP email, your email setup is now complete. Please move to the "What next?" sub-heading of this section.
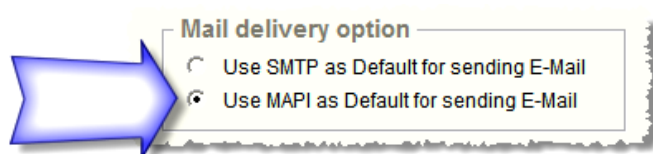
MAPI email configuration

1. Choose the *Use MAPI as Default for sending E-mail* radio button:

2. On the workstation you will be using to print to AutoDoc HSE, perform the following:

   ▪ Run the client viewer (see the section on "Client setup" in the Reference Manual) if you haven't already performed this step as part of the installation.

   ▪ Ensure that Outlook's Exchange Server Settings have the *Use Cached Exchange Mode* checkbox cleared:
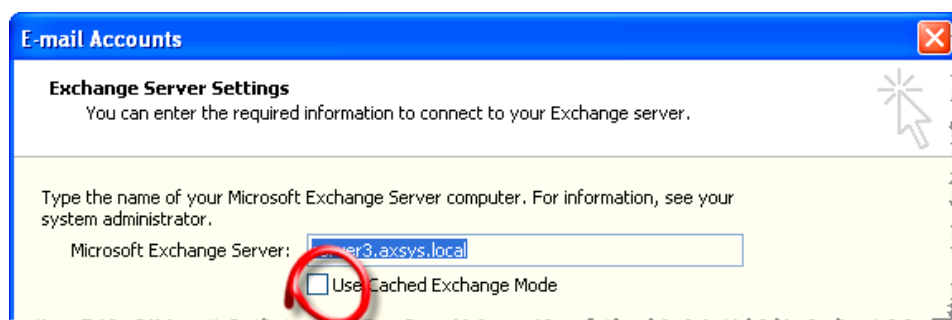
What next?

Your next step depends on what outcome you have chosen.

Create &
Archive PDF
of document

If your chosen outcome(s) includes archiving, you need to go to Step 6, which starts on page 24.

If your chosen outcome(s) does not archiving, you can go straight to Step 7, which starts on page 27.

Setting up AutoDoc HSE archiving

This section details setup required to achieve the following outcomes:

Create & Archive PDF of document

AutoDoc HSE's archive feature consists of converting the document to PDF (or XML – please see the Reference Manual for this functionality), and saving it in a predefined, user-defined location (or multiple locations).

AutoDoc HSE archiving

Along with any other delivery methods you choose to employ for a print job, AutoDoc HSE can archive a copy to a user-defined location.

Navigate to the Form Templates setup area of the AutoDoc HSE application, and then the PDF Archive tab:
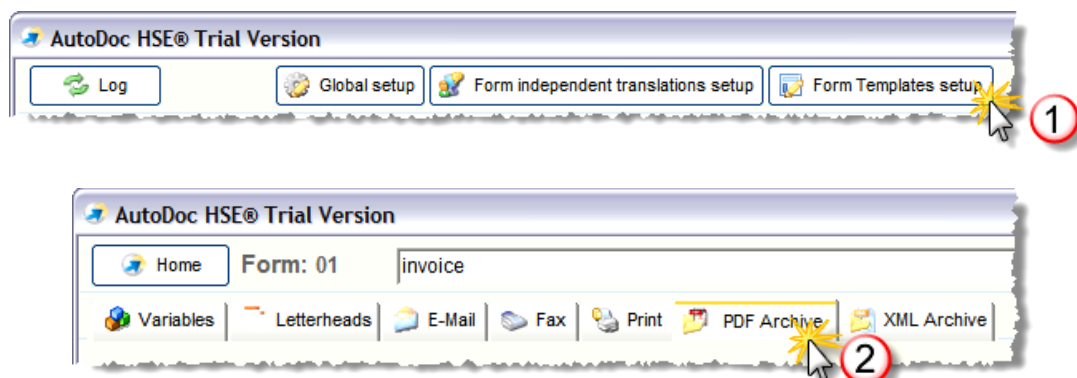
Perform the following steps:

1. Complete the options for *PDF Path #1* and *PDF Path #2* to match the text below. Note that only the highlighted text needs to be reproduced exactly – you can choose your own file location and the example will still work provided you use the highlighted sections below for the last component of your filenames.

PDF Path #1:

`C:\Documents and Settings\Jeff\My Documents\test\Quick Start Archive.pdf`

PDF Path #2:

`C:\Documents and Settings\Jeff\My Documents\%formname% for %Account Name% %date%.pdf`

Note that the first path can be any valid Windows path you choose, provided the filename ends in the .pdf file extension. The second path makes use of AutoDoc HSE 'variables' (which are explained later in this guide). While the non-highlighted part can be any valid path you choose, the highlighted part should be reproduced exactly.

When specifying paths which AutoDoc HSE needs to read from, create, and/or write to, wherever possible, choose drives that are local to the AutoDoc HSE application. This minimises problems when there are network access/permissions issues (for more information, please refer to the section on "File Locations and References" in the Reference Manual).

2. Check the *Use letterhead* checkbox for the second path, and the *Overwrite PDF* checkbox for both paths. Your settings should now appear as follows (with the exception of any changes you made to the non-mandatory parts of the paths):

PDF Path #1	C:\Documents and Settings\Jeff\My Documents\test\Quick Start Archive.pdf	☐ Use letterhead ☑ Overwrite PDF
Run program		Parameters
PDF Path #2	C:\Documents and Settings\Jeff\My Documents\%formname% for %Account Name% %date%.pdf	☑ Use letterhead ☑ Overwrite PDF
Run program		Parameters

3. Apply your changes.

What next?

Regardless of which outcome(s) you have chosen, you now need to go to Step 7, which starts on page 27.

Editing your document

This section details setup required to achieve the following outcomes:

Print hard copy	Create & Email a PDF of document	Create & Archive PDF of document	Fax the document

We have supplied a pre-made document, which you will need to edit to match the choices made during the steps in this guide.

The pre-made document

When you installed AutoDoc HSE, a pre-made document was installed to the directory to which you chose to install AutoDoc HSE. If you accepted the default installation path, you will find the pre-made document here:

```
C:\Program files\AutoDoc HSE\Quick Start Invoice.rtf
```

We recommend that you open this document using Microsoft WordPad (generally supplied with Windows 95 and above). WordPad can be accessed from the Start Menu, via the following hierarchy:

Start | All Programs | Accessories | WordPad
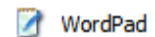
Alternatively, WordPad can be accessed from the Run dialogue box:

Start | Run | `wordpad`

Once the `Quick Start Invoice.rtf` file is open in WordPad, you are ready to make the required changes.

Editing

> Please do **<u>not</u>** change the colours of any of the text in the document unless explicitly instructed to do so!

Perform the following steps in WordPad:

1. If you chose not to configure AutoDoc HSE for sending emails, delete the email address from the document (and the "email:" label as well, if you prefer). If you are using AutoDoc HSE for sending emails (that is, if you worked through Step 5, "Setting up email", in this guide), change the email address to one via which you can receive email – for example, your own or a colleague's.

Invoice to: ABC Automotive (email: quick@startguide.com fax: 90123456)
Invoice due: 26/8/2007
Invoice total: $320

FIGURE 1 – highlighting the email address to be changed (or removed). The font colour of the email address is (and must be, for this exercise) "blue".

2. If you chose not to configure AutoDoc HSE for sending faxes, delete the fax number from the document (and the "fax:" label as well, if you prefer). If you are using AutoDoc HSE for sending faxes (that is, if you worked through Step 3, "Setting up Microsoft® Fax", in this guide), change the fax number to one that you can check – for example, your own or a colleague's.

Invoice to: ABC Automotive (email: quick@startguide.com fax: 90123456)
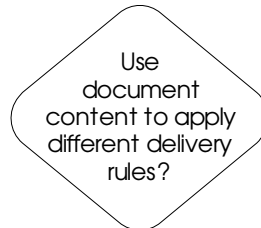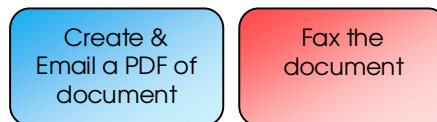Invoice due: 26/8/2007
Invoice total: $320

Figure 2 - highlighting the fax number to be changed (or removed). The font colour of the fax number is (and must be, for this exercise) "blue".
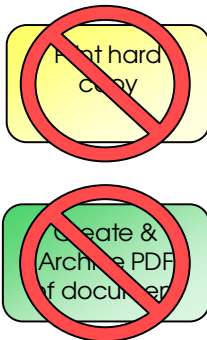
AutoDoc HSE Translations

This sub-section details an *optional* step associated with the following outcomes:

By following the instructions in this sub-section, you will see AutoDoc HSE apply a different set of delivery rules, based on document content, using 'translation' commands.

AutoDoc HSE translations interpret document content to apply a different set of delivery rules. By following the steps detailed in this section, the outputs from AutoDoc HSE will be different from those applied if you don't follow these steps.

If you use translations as described in this section, AutoDoc HSE will **not** print a hard copy of your print job, nor will it archive your document (even if you completed Step 6 on Archiving) – this is an intended result, to demonstrate the effect of translations. You may find it useful to try AutoDoc HSE **without** the changes described in this section, and then *again* **with** the changes described in this section, to gain a better understanding of the difference that AutoDoc HSE translations can make.

If you don't want to use translations at this time, go to the "What next?" section on page 30.

We will use the example of an overdue invoice to demonstrate how AutoDoc HSE can interpret document content to apply different delivery rules.

1. Add the word "Overdue" to the invoice heading:

2.

3. Click and drag to select the word "Overdue" and click on WordPad's *Color* toolbar button:
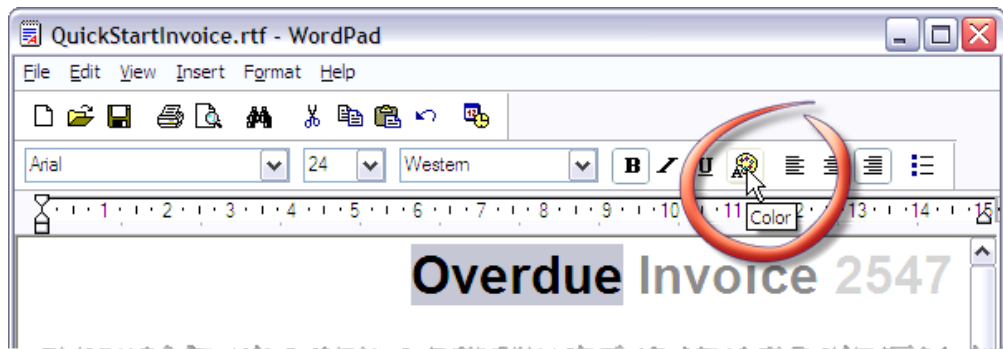
4. Select *Red* to change the font colour to red:

Once you remove the highlight from the word "Overdue", your invoice heading should now appear as follows:

Overdue Invoice 2547

> For this exercise the word "Overdue" must appear exactly as seen here – with an upper-case "O" and the remainder of the word in lower-case, with the whole word in red text.

What next?

Regardless of which outcome(s) you have chosen, you now need to go to Step 8, which starts on page 31.

Printing your document

This section details setup required to achieve the following outcomes:

Print hard copy	Create & Email a PDF of document	Create & Archive PDF of document	Fax the document

Here's the fun part – hit the print button and sit back while AutoDoc HSE performs all the delivery options you set up.

The AutoDoc HSE printer

The first time you ran the AutoDoc HSE application, AutoDoc HSE installed a virtual printer on your computer. The printer is called AutoDoc HSE:
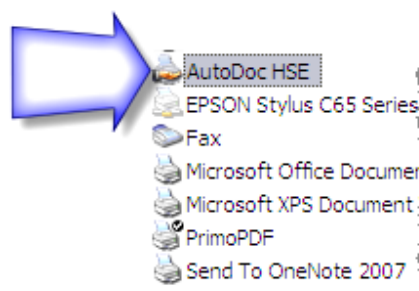
Getting AutoDoc HSE to deliver a document for you (whether it's producing a hard copy, archiving, faxing, emailing, or all of these) is as simple as printing a document with this AutoDoc HSE printer.

Print!

1. In the WordPad application, use the File | Print... menu option to print to the AutoDoc HSE printer:
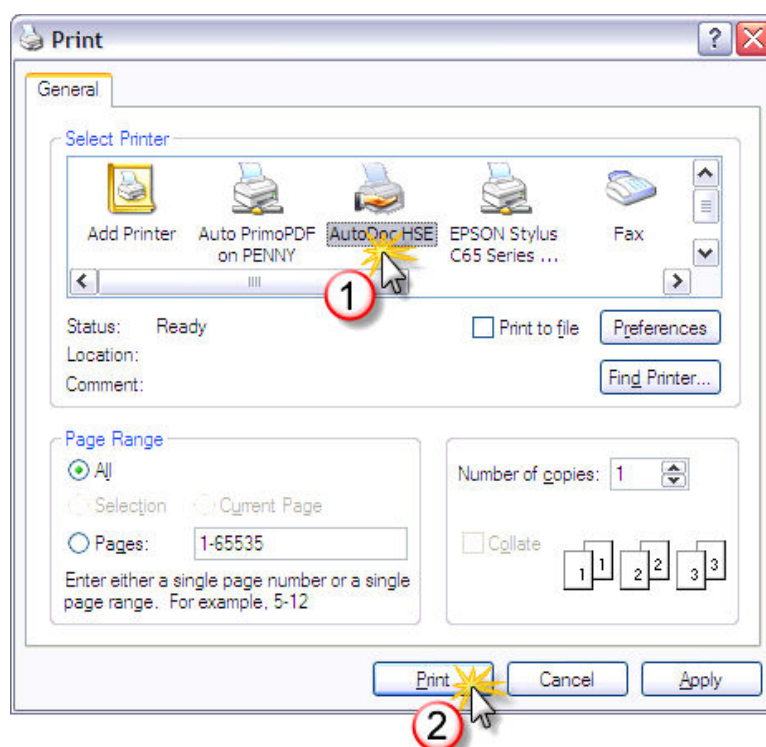
What next?

Sit back and watch AutoDoc HSE email, fax, archive, and print, depending on the options you chose. If you move to AutoDoc HSE's Log view (you may need to

click the *Home* button first, then the *Log* button) you can see the deliveries generated by your single click of the *Print* button:

FIGURE 3 – showing log information. When all outcomes from this Quick Start Guide are chosen (but without the translation set up on page 29), the output displayed would be one copy sent to a printer, one fax, one email, and two archive copies.

Create & Email a PDF of document

If you used the email outcome, check your email (the address you entered on the invoice document).

Fax the document

If you used the fax outcome, check your fax machine (the one with the number you entered on the invoice document).
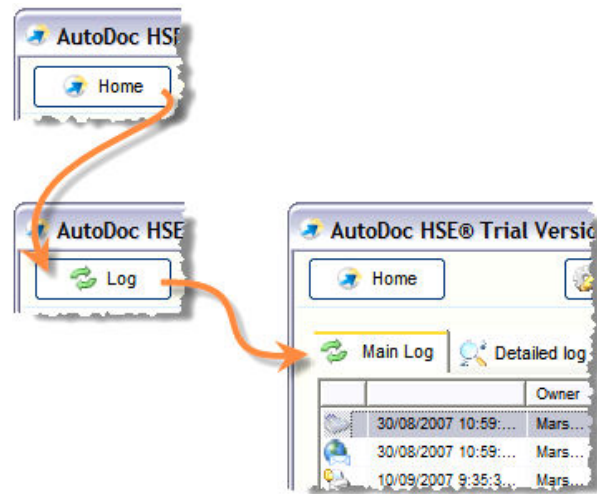
Print hard copy

Unless you specifically chose *not* to print hard copies, you should also check the output tray of the printer which you specified as the default user's printer (check AutoDoc HSE's Users tab in the Global setup area to see which printer you chose, if you can't remember). Note that nothing will have printed if you elected to use the "Overdue" translation.

Create & Archive PDF of document

If you chose the "Archive" outcome, you should also check the file location you specified for Archive files (check AutoDoc HSE's PDF Archive tab in the Form Templates setup area to see the locations you specified, if you can't remember). Note that nothing will have been archived if you elected to use the "Overdue" translation.

You can read the next section for an explanation of how AutoDoc HSE worked for the particular settings in this guide. You may also like to return to the translations setup on page 29, to try editing your document to see how AutoDoc HSE behaves when you apply the reverse approach (that is, if you didn't use translations for the first print job, try it again using translations, and if you did use translations, try it again without translations).

Understanding: How does it do it?

As you can see, AutoDoc HSE is a very powerful delivery tool. It harnesses some very simple techniques to enable a single click of the *Print* button to perform a wide variety of tasks.

The key to successful use of AutoDoc HSE is in how AutoDoc HSE's settings are configured. This section explains how AutoDoc HSE used the simple invoice content to deliver the document 'intelligently'.

Once again, this guide is intended as a quick introduction only. For a full explanation of how AutoDoc HSE works, and its variety of features and functions (many of which have not been looked at in this guide), please see the Reference Manual.

Colour is the key

You may have guessed - AutoDoc HSE uses font colour to interpret a document's content. Which colours AutoDoc HSE uses for different purposes, is part of AutoDoc HSE's user-definable configuration. Colour configuration is detailed fully in the Reference Manual (as are alternatives to colour).

In section 2 of this guide, "Install", you loaded a pre-prepared configuration file (step 12 on page 11). This gave AutoDoc HSE the information it needed to be able interpret the pre-prepared invoice document. We'll now look at this configuration.

Command Colour

If you navigate to the Global setup area, and then the General tab, you'll see that AutoDoc HSE is configured to treat any text in blue (RGB = 0,0,255) as an AutoDoc HSE command. This is how AutoDoc HSE recognised the email address and fax number (which are blue) in the invoice.
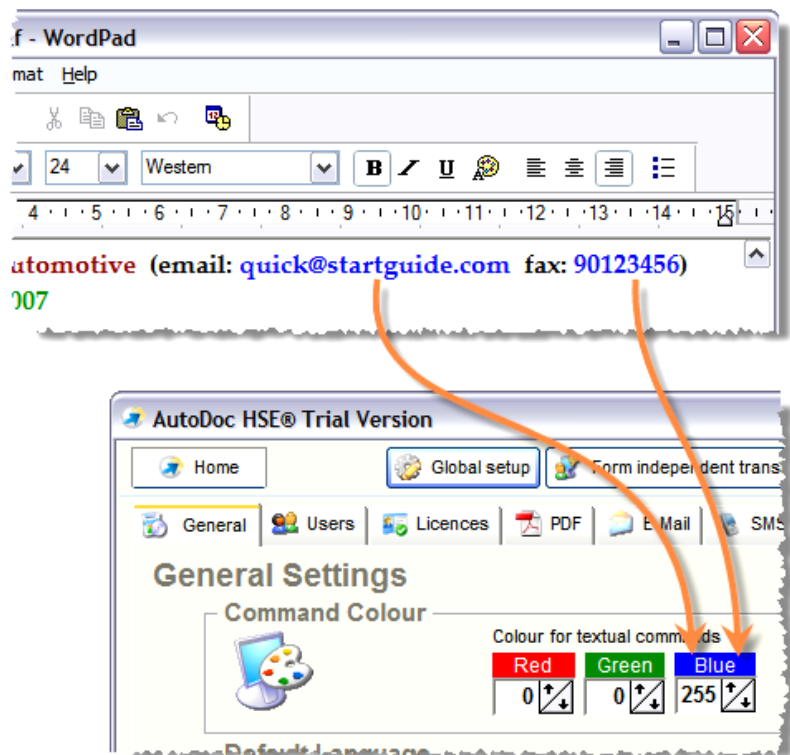

FIGURE 4 – Under this configuration, AutoDoc HSE interprets blue text in the print job as something it needs to treat as a command.

Note that this setting is user-definable – you could easily use white text (that is, invisible text, on a white background) as the command colour (RGB = 255, 255, 255).
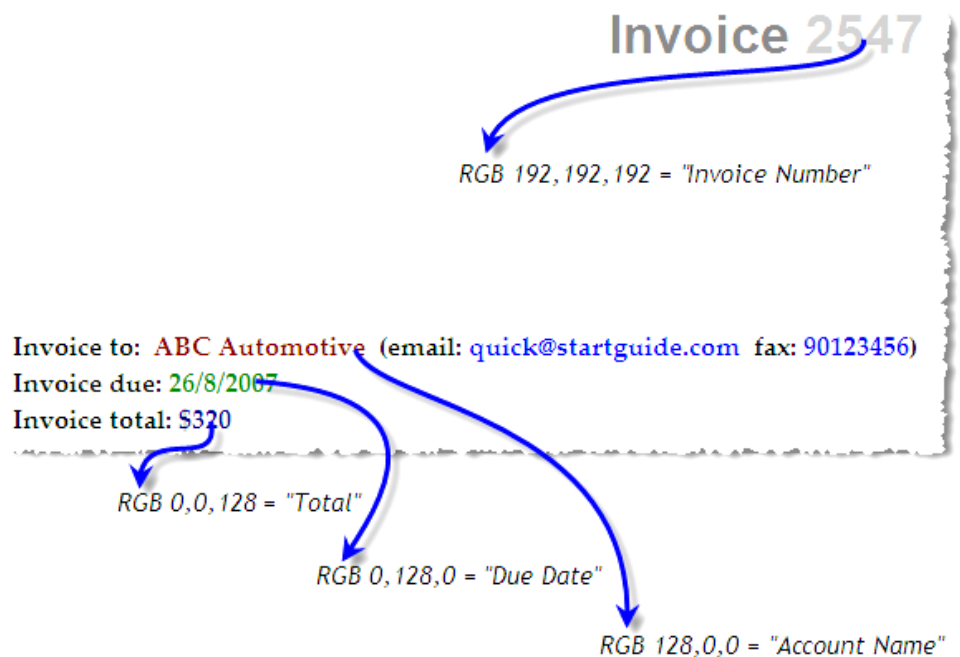
Variable Colours

As well as commands (text that AutoDoc HSE treats as instructions), AutoDoc HSE can store text from your print job to use later, as part of a subject heading for an email, or fax header information, for example. Such stored text is called an AutoDoc HSE variable. As with commands, variables are also user-defined, by font colour.

Navigate to AutoDoc HSE's Form Templates setup area, and then the Variables tab, and you will see that the pre-prepared configuration also includes some variables:

Field name	Red	Green	Blue
Invoice Number	192	192	192
Account Name	128	0	0
Due Date	0	128	0
Total	0	0	128
Variable 5	5	5	5

FIGURE 5 – This configuration results in AutoDoc HSE searching for text in the print job which has RGB font colour values of 192, 192, 192, and storing that text as a variable with the name "Invoice Number". Similarly, text with an RGB value of 128,0,0 is stored as "Account Name", and so on.

In the invoice document, the text has been pre-coloured to match this configuration:

Invoice 2547

RGB 192,192,192 = "Invoice Number"

Invoice to: ABC Automotive (email: quick@startguide.com fax: 90123456)
Invoice due: 26/8/2007
Invoice total: $320

RGB 0,0,128 = "Total"

RGB 0,128,0 = "Due Date"

RGB 128,0,0 = "Account Name"

Navigate to AutoDoc HSE's Form Templates setup E-Mail tab, and you will see that this has also been preconfigured.

The form name has been entered as `invoice`, and the subject of the email has been entered as `%formname% for %account name%, %total%`:
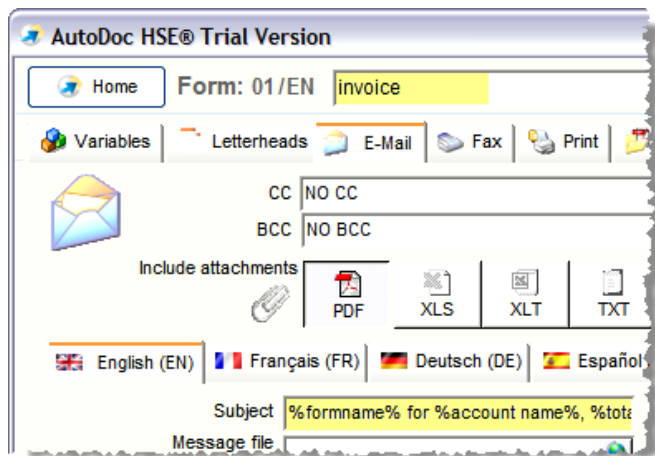
Whenever percentage symbols are used in an AutoDoc HSE field to enclose text which is used to create output, this signifies that a variable is being used. So, the subject heading which has been entered as `%formname% for %account name%, %total%`, is actually telling AutoDoc HSE to create this subject heading:

```
[substitute this bracketed text with the name of this form] for
[substitute this bracketed text with the text stored in the
variable called "account name"], [substitute this bracketed
text with the text stored in the variable called "total"]
```

> Note that while, in this exercise, variables were very different colours, this isn't necessary. Just as you can instruct AutoDoc HSE to treat white (and therefore invisible) text as textual commands, you can instruct AutoDoc HSE to look for text that is very close to black, and treat these as variables. For example, this sentence has a font colour of RGB 1,1,1. And this sentence is RGB 10,10,10. You can't tell the difference, but AutoDoc HSE can. This means you can have a variable-rich document which, to the reader, looks like any other document.

Delivery methods

Depending on what delivery methods you chose to use, the exercise in this guide could have produced all of the following:

- An email with the invoice attached as a PDF file

- A fax of the invoice

- A hard copy of the invoice

- Archived PDF copies of the invoice

These delivery methods are all configured within the AutoDoc HSE application's tabs (the associated tabs are located in the Form Templates setup area, respectively labelled E-mail, Fax, Print, and PDF Archive). There are many options and features associated with each of these delivery methods, including

the ability to use variables to construct text for the deliveries, or dynamically construct file locations based on the variables.

We will look quickly here at the features used in this example.

Translations

If you chose to perform the "AutoDoc HSE Translations" steps in section 7, "Editing your document", the output from your print job would have been different. To see why, navigate to AutoDoc HSE's Form independent translations setup area (you may need to click the *Home* button before the *Form independent translations setup* button is accessible).
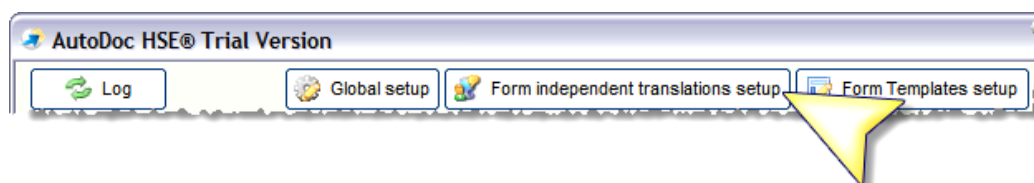
This area has also been preconfigured:

| Field contents	Red	Green	Blue	Left	Top	Right	Bottom	Translates to AutoDoc command
Overdue	255	0	0	0	0	0	0	2

AutoDoc HSE translations are like a hybrid of AutoDoc HSE commands and AutoDoc HSE variables. The row entered in the table tells AutoDoc HSE to look in the print job for the text "Overdue" which has a font colour of red (RGB=255,0,0). The last column of the row (*Translates to AutoDoc command*) tells AutoDoc HSE that if this text exists in the document, AutoDoc HSE should treat it as though the text actually says "2", in a font colour which equates to an AutoDoc HSE command.

Overdue Invoice 2547

If the *Translates to AutoDoc command* entry had been `mailme@thisaddress.com` rather than `2`, this would've instructed AutoDoc HSE to send the invoice to that email address, had the red "Overdue" text been found in the print job (as well as sending it to any address specifically entered in the document).

But, in our example, we added the text "Overdue" to the invoice, in red text, and AutoDoc HSE interpreted this as meaning "2". So what does "2" mean to AutoDoc HSE? It means that it should use Form number 2 to deliver the print job. To see what this means, navigate to AutoDoc HSE's E-Mail tab (located in the Form Templates setup area).

Here, the number of the current form is listed, together with the name of the form:
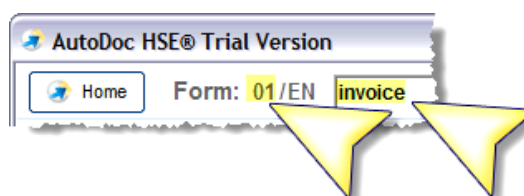
Depending on which version of AutoDoc HSE you are using, there are up to 99 forms available. This means there are 99 different configurations that can be applied to print jobs. You can configure (or view) the other forms by using the drop-down arrow on the *Form name* field. Do this to locate Form 2 (which is what we effectively instructed AutoDoc HSE to use via our "overdue" translation):
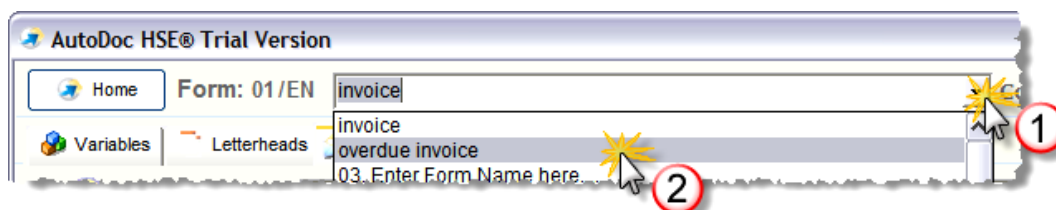

Figure 6 – Selecting Form #2, which in our preconfigured set of forms, is called "overdue invoice".

This is the main "secret" to understanding how the translation made such a difference to the delivery outputs. By adding one word to the invoice, the document can be delivered under a completely different configuration.

Letterheads

AutoDoc HSE's Letterheads tab is used to specify letterheads to apply to the delivered documents. This is where the logo came from, and where the diagonal 'overdue' text came from (if you chose to use a translation). Note the difference in the Letterheads tab, between form #1 "invoice", and form #2 "overdue invoice".

Form #1:

PDF Letterhead on first page

"C:\Program Files\AutoDoc HSE\letterheads\yourlogo.pdf"

Form #2:

PDF Letterhead on first page

"C:\Program Files\AutoDoc HSE\letterheads\overdue.pdf"

E-mail

AutoDoc HSE's E-Mail tab allows you to specify how you would like AutoDoc HSE to deliver emails created by print jobs sent to the AutoDoc HSE printer. You can configure such things as email CC and BCC, subject headings, message text, additional attachments, delivery file format of the original print job, SMS text delivery, and more.

In this exercise, both the email subject heading and message text make use of AutoDoc HSE variables to dynamically create message text based on the content of the printed document itself. Again, the email configurations for the invoice and

the overdue invoice are slightly different, producing different results from the print job.

Fax

AutoDoc HSE's Fax tab allows you to specify how you would like AutoDoc HSE to deliver faxes created by print jobs sent to the AutoDoc HSE printer. You can configure such things as delivery times, fax header information, cover pages, and more.

In this exercise, both the fax subject heading and recipient details make use of AutoDoc HSE variables to create message text dynamically, based on the content of the printed document itself. The actual fax-specific configurations for the invoice and the overdue invoice are *exactly* the same, but because the %formname% variable has been used in the subject heading (and the two forms have different names), a different fax subject heading is achieved.

Print

AutoDoc HSE's Print tab allows you to specify how you would like AutoDoc HSE to create hard copies from print jobs sent to the AutoDoc HSE printer. You can configure such things as multi-drop printing, letterhead use, watermark use, and more.

In this exercise, form #1 "invoice", is configured to print a hard copy to the printer that you specified as your preferred printer in section 4, "Creating AutoDoc HSE's default user" (unless you specifically opted to *not* produce hard copies).

Form #2, for the overdue invoice, has no hard copy configured, and as a result, the translation exercise does not produce a hard copy.

PDF Archive

If you opted to use AutoDoc HSE for archiving (as in section 6, "Setting up AutoDoc HSE archiving"), you would already have seen the PDF Archive tab. Form #1 was configured to save two PDF files, one of which made use of variables to construct a meaningful file name specific to the invoice. Note that you can also use variables to refer to directory names, not just filenames.

Only the second file specified results in a letterhead being included in the PDF file. This is because the *Use letterhead* checkbox was only checked for the second path.

If you were to repeat the exercise using the same configuration, the PDF files you created in the first run would be overwritten. This is because the *Overwrite PDF* checkboxes were both checked. If they were cleared, a subsequent PDF creation would be *appended* to any existing PDF file of the same filename.

Form #2 had no archive configured, and as a result, the translation exercise does not produce an archive file.

End of Quick Start Guide