PDF Print Workflow Automation Solution
For
Xerox • Canon • Océ • Ricoh • Konica Minolta

Intelligent Automated
Variable Document Print Production

SmartPDFPrintware™
Automatic Job Ticketing Solution

User Guide
Support

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Forward

Innovative, forward-looking customers have driven development of SmartPDFPrintware. Current capabilities are result of our response to fulfill their wide ranging needs. Future enhancements will depend on cooperation by users like you. If you identify a need, business challenge facing you, we will do our level best to meet it.

SmartPDFPrintware has been in development since early 2004; and development and enhancements will continue. In this user guide, just because we have yet not mentioned a capability or feature, you are looking for; please do not assume SmartPDFPrintware cannot do it.

Audience

You need not be a computer programmer or software engineer to use this software. We believe within few hours, by practicing step-by-step tutorials given in this user guide along with test PDF documents provided, you will become proficient in use of this software.

Every one who has some familiarity with what constitutes an assembled document – covers, tabs, separators, inserts, page exceptions, page overrides, and different finishings can become a PDF print automation expert – by using this software. With practice, you will be able to setup and process most jobs in about ten minutes.
Welcome

Welcome to SmartPDFPrintware.

This user guide has been designed to help you analyze and setup PDF print jobs quickly. To eliminate confusion, a show-as-you-go style that uses screen shots liberally to demonstrate the procedures has been adopted. We will keep updating this user guide. You will find latest revision on our website.

After you have installed the software, we encourage you to install the tutorials. This will create necessary folders and unzip practice PDF documents into appropriate folders. We encourage you practice step-by-step tutorials included in this user guide. You will experience first hand how easy it is to setup and run.


Introduction

PDF is the de facto standard for delivering high-quality documents to print production. Documents created in any graphic, transaction, or data processing application, on any computer platform, can be delivered in PDF for print production.

SmartPDFPrintware enables you to get more production out of your digital printing press and printing system by enabling quick turn around of wide variety of high-value added print jobs involving complex document assembly and finishing with minimum or no manual intervention.

Without SmartPDFPrintware, to automatically print and finish these complex jobs usually will require you to write one off, custom print application program. Many print service providers are unable to keep writing one off print programs as there may be lack of in-house programming talent and many times because of level of programming effort needed is much more than what can be justified economically. Even if there is economic justification, it is difficult to find programmers who are proficient in Postscript, PCL, Xerox VIPP, Xerox Metacode, or JDF. Result is there is significant delay in turning around jobs. Even though printing systems are capable of producing these jobs automatically, you may be forced to print these in parts and manually collate it and finish it. SmartPDFPrintware eliminates need to write custom print programs, enabling faster turn around of most jobs in about ten minutes. Quick turn around of jobs results in higher print volumes resulting in better bottom line.

You can think of SmartPDFPrintware as Swiss Army knife of PDF printing and finishing workflow automation. It is an intuitive, universal print workflow automation solution.

When majority of jobs you receive are in PDF, SmartPDFPrintware is as essential as a toner. It is the difference between success and failure. It saves time, money, and gives you back control down to page level by minimizing or eliminating frustrations, headaches and hassles related to printing and finishing of PDF documents on digital presses and printing systems.
Overview

The Job

SmartPDFPrintware™ focus is to automate production of assembled, complex, variable documents without manual intervention. To automate variable production, we have to establish conditional document assembly rules and parameters. Simple and intuitive graphical user interface of SmartPDFPrintware enables you to easily enter and save rules and parameters that will control automatic production of variable documents.

In order to automate PDF print job, we studied, analyzed all types of print jobs in wide variety of industries. This helped us to conceive intuitive, simpler way of categorizing the automation methods needed to accomplish the job without writing any print program.
Universal Variable PDF Document Production Solution

**Mainframe, Midrange, Windows, Mac, Unix Graphic/Web/MIS applications generate variable PDF jobs**

**SmartPDFPrintware Hot Folders**
- Pre-flighted, print ready **PDF Jobs**

**Job**: On demand manuals, books, reports.
**Environment**: Walk-in Shop, Quick Print Shop, In-plant Print Shops, Service Bureau

**Requirements**:
- Mixed paper sizes
- Page exceptions
- Multiple subsets
- Subset media, sides, finishing
- Insert pre-printed, precut tabs, covers, slip-sheets

**SmartPDFPrintware setup**
- **POSITION** method

**Job**: MIS reports, Web Fulfillment materials
**Environment**: Data centers, In-plant Print Shops, Financial Printers, Service Bureau

**Requirements**:
- Conditional stock, sides, finishing selection for each document in job
- Insert slip-sheet between documents, banner at beginning of set

**SmartPDFPrintware setup**
- **FILE NAME** method

**Job**: Legacy application output to one large PDF file
- Bills, Statements, Financial Reports, Invoices, Notices
**Environment**: Data centers, In-plant Print Shops, Financial Printers, Service Bureau

**Requirements**:
- Split large PDF intelligently into separate, variable length Statements, Reports, Notices etc.
- Split each Statement into multiple Subsets
- Print subsets on different stocks, sides; do subset finishing and inserts.

**SmartPDFPrintware setup**
- **TEXT-ON-PAGE** method

**Start production of variable documents in about 10 minutes**
Automation Methods

To implement conditional rules and parameter driven print, and finishing of variable PDF documents involving mixed page sizes, mixed media, subset finishing, total print sequence control and more, SmartPDFPrintware relies on properties of PDF documents that you are already familiar with. When you study a job for automatic production, you note that (a) print position of each PDF document in the job is specific; (b) each PDF document has a unique file name; and (c) when you are trying to split up a large document with multiple Statements, Invoices, you use Account Number or Customer Number on page - text on page. We can use these attributes to classify and establish workflow automation rules and parameters. Hence, we decided to give job automation methods names that reflect the property being used for automating the job – Position, File Name, and Text On Page. We will try to explain and expand on each automation method.
Position

Most print jobs involve production of a set of PDF documents. These documents may be assigned file names that may be descriptive of subject it contains.

Most jobs require these documents be printed in certain specific sequence. In addition, buyer may want specific range of pages of each document stapled – Subset Finishing. We have classified these type of jobs which rely on a position of document in the print sequence and position of pages within a document used to create the subsets and its subsequent processing – switching media, finishing from one subset to next etc as **Position** automation method.

Following screenshot illustrates typical job that can be processed by Position method.

![Typical job processed by Position method](image)

**Position method benefits**
- No manual collation
- Mixed Page sizes
- Control print sequence – drag drop, position text file
Variable text on precut tab
Page level control Subset finishing
File Name

Users can order from report generating systems hundreds, may be thousands of PDF reports a day. In order to maintain integrity of these orders, there is a need to keep multiple documents in each order together and print these documents in certain specific sequence requested by the user. Most PDF document names are dynamically generated by MIS applications. While documents are dynamically generated, these applications are aware of printing and finishing needs of the PDF being produced. Document generation system can incorporate document production intelligence in the File Name of the document. SmartPDFPrintware can use production intelligence built into the File Name to produce, non-stop, variable documents – eliminating need for manual collation.

A file name can be composed using logically meaningful text blocks separated by a special character such as space, dash or an underscore. This special character is called Field Separation Character. These text blocks can be associated with different print and finishing controls. Judicious use of text blocks enables you to maintain integrity of the job, to control print sequence, to switch paper stock for each document on the fly, do selective finishing etc.

Important: Please note that each Field can control only one action such as group documents, control print sequence, select media, select side, select finishing, etc.

Following screenshots illustrates well-formed File Names that SmartPDFPrintware leverages to automate job production.
**Bulk Mailing**

- Print this info on Document Banner
- Select Media
- Use numeric value to control Print Sequence
- Use numeric value to control Print Quantity
- Group documents with same values for printing

**Music Sales**

- Use numeric value to control Print Quantity
- Use numeric value to control Print Sequence
- Group documents with same values for printing

**Designate Underscore _ as Field Separation Character**

**Designate Space ' ' as Field Separation Character**
**Maintenance Manuals**

- Use numeric value to control Print Sequence
- Select Media
- Designate Underscore _ as Field Separation Character

**Web Reports**

- Use numeric value to control Print Sequence
- Select Media
- Select Sides
- Select Finishing
- Designate Underscore _ as Field Separation Character
- Group documents with same values for printing
Text On Page

Large batch systems produce every day millions of transaction documents such as Monthly Bills, Financial Statements, Investment Quarterly Reports, Invoices, and Advisory Notices. Usually these documents are result of batch processing of daily, weekly, monthly transactions. Because of lower cost of PDF libraries each batch run may generate one large PDF, may be say 60,000-page file containing multiple individual Bills, Statements.

You can split; burst a large PDF into a separate document (e.g. Statement) by using text appearing within an area on page. This text may be Customer Number, Account Number, Invoice Number, fixed text on remittance page etc.

Depending on layout of document, you can use either static text, variable text or a combination of static and variable text on page, to split a large document. Once a large PDF is split, each document (Set) can again be split to subsets. Using text as a controller of variable document production is classified as Text On Page automation method.

Following screenshot illustrates use of static text ‘Year End Tax Report’ to split the document.

Explanation: Test job file has 492 pages. There are 10 separate statements. The static text ‘Year End Tax Report’ appears on first page of each tax statement. By using static text ‘Year End Tax Report’, SmartPDFPrintware splits test document in to 10 separate statements called ‘Sets’. Each Statement (Set) lists varying number of investment transactions resulting in varying number of pages. To select high quality media for first three pages of each Statement, each Set in turn is split in to ‘Subsets’.
Benefits

Intelligent Split bust large reports in to variable length documents
Use static text, variable text and static plus variable text
Inshort you can split using most flexible rules schema
Subset – page position, text
Switch media, sides
Deciding which automation method to use

To determine which automation method to use for the job to be processed, please study following flow chart. We hope it will help you decide which automation method to use.

1. **Job**
   - **Multiple PDF files in one job.**
     - **Yes**
       - **Are File Names well formed?**
         - **Yes**
           - **File Name method**
         - **No**
           - **No**
     - **No**
       - **Split one large PDF**
         - **Yes**
           - **Can use Text On Page method?**
             - **Yes**
               - **Text On Page method**
             - **No**
               - **No**
         - **No**
           - **No**
Process Flowchart

Print Job **Hot Folder**
PDF Files and UDPWAEO
- One **Hot Folder** per workflow
- Up to **256** Hot Folders

SmartPDFPrintware™ Workflow Automation Setup GUI

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</tr>
<tr>
<td>File Name</td>
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<tr>
<td>Text-On-Page</td>
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</table>

Save workflow setup in **Universal Document Print Workflow Automation Extensible Object**
UDPWAEO – (XML File)

PDF Files and UDPWAEO to Printware PlugIn

**Printing and Finishing System Specific Printware PlugIn**

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<th><strong>Sequential State Machine</strong></th>
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<td>Parses UDPWAEO and processes PDF Files in the job</td>
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</tbody>
</table>

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<th>Printing System Specific Data Emitter</th>
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<td>Your Digital Printing and Finishing System</td>
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Finished Jobs

FTP, Drop, Copy Print Job PDF files Into Hot Folder

Print Job **Hot Folder**
PDF Files and UDPWAEO

Hot Folder **Watcher**
With Event Timer

Launch Print
Send PDF Files

Job Processor Selects Printware PlugIn

Print Job **Processor**

Job Tickets & PDF Files to Network

Your Digital Printing and Finishing System
Output

SmartPDFPrintware output depends on which the plugin is used. At this time we are delivering plugin to produce job tickets for Xerox, Canon, Océ, Ricoh, Konica Minolta systems.

Plugins

SmartPDFPrintware plugin dynamically creates job specific XML Job Tickets, which enables complex print jobs that take advantage of wide ranging printing and finishing options available in your Digital Presses and Production printers.

SmartPDFPrintware prepends each PDF document with an XML job ticket that instructs print controller how to print and finish document that follows it.
TCP/IP LPR Printing

SmartPDFPrintware transmits job tickets and documents to print controller over TCP/IP using LPR / LPD protocol.

You can add each printer in your network with its IP Address, Print Queue name and type of print engine - black and white, color, or highlight color.

When SmartPDFPrintware transmits job to the controller, it sends along with job ticket and PDF documents, queue name, job name, and user name.
Print Queue

Our goal is to minimize or eliminate manual processes. Hence, only reliable way to handle wide variety of jobs without Print Controller faulting it out is to break it down to a level at which Print Controller can successfully process it. This results in large number of entries in the print queue. If you allow the system to do its job, you will receive in correct sequence, collated, jobs.

Note: Because we want jobs to be printed in the same order they are sent by SmartPDFPrintware, please configure print queue on your Print Controller for first in, first out (FIFO) workflow processing.
Hot Folders

Each unique workflow requires its own hot folder. SmartPDFPrintware can monitor up to 256 hot folders. Hence, it can support up to 256 unique PDF workflows. SmartPDFPrintware Operations Command Center displays hot folders and its associated conditional document production and assembly rules and parameters saved during its setup.

Hot Folder Watcher watches each hot folder. A timer associated with hot folder watcher schedules work – automating unattended production of documents arriving in the hot folder.

Job, Workflow and Hot Folder

Every time you want to add a new job, give that job a unique name. SmartPDFPrintware creates a new workflow hot folder for new job and give it name you assigned. To the newly created hot folder, SmartPDFPrintware adds a XML file with Universal Document Print Workflow Automation Extensible Object (UDPWAEO) which contains document production rules and parameters. Name of XML file is same as the hot folder name.

Location

When you add a new hot folder, it is saved under following root folder:

<local_drive>:\B2BeDocuments\SmartPDFPrintware\B2BeDocHotFolders

Please familiarize with location of this SmartPDFPrintware “Root” folder. You will be interacting with hot folders underneath B2BeDocHotFolders. Please study following screen shot, which shows relative location of where B2BeDocHotFolders is located on your hard drive.
Universal Automation

To automate a job, during workflow setup, you will establish conditional job processing rules and select parameters that enable unattended production of variable documents. When you save workflow setup, the configuration values written to a XML file. This file is saved in the Hot Folder being setup. Its name is `<HotFolder_Name>.xml`.

Setup process controls, rules, parameters, and actions saved in XML (UDPWAEO) file.
Add Hot Folder

Step by Step Tutorial HF01: Add Hot Folder

Note: Hot Folders will be created and added under "<local drive>:\B2BeDocuments\SmartPDFPrintware\B2BeDocHotFolders"

1. Prerequisite:
   a. Install SmartPDFPrintware.
   b. For instructions on how to install, please look it up in the Appendix of this user guide.

2. Start SmartPDFPrintware

3. Click desktop shortcut to start SmartPDFPrintware

4. Select on top main menu bar the Hot Folders menu item

5. Hot Folder tab comes in to focus

6. In the Hot Folders tree view, Select Hot Folders node

7. Right Click

8. - - - Now Add New Hot Folder - - - - -

9. Select the Add New Hot Folder menu item

10. Window opens: Add New Hot Folder - B2BeDocuments™ SmartPDFPrintware™
11. Select the text box. Enter Hot Folder name.
   a. Example: ‘SunPower’

12. Click the **Apply** button

13. Click the **OK** button
   a. Example: Hot Folder 'SunPower' added under <local drive>:\B2BeDocuments\SmartPDFPrintware\B2BeDocHotFolders\SunPower

14. - - - Copy Job Files – PDF Documents - - - - -
15. After adding a hot folder, copy a representative set of PDF documents into the hot folder. These PDF documents will be used to setup workflow, configure the hot folder.
16. - - - Download Test PDF Files - - - - -
17. You can download a set of test / practice PDF files from B2BeDocuments website. We use these files throughout this user guide to help explain different features of SmartPDFPrintware.
   a. Example: Download "SunPower.zip"
18. Unzip the maintenance manuals to the hot folder 'SunPower'.
19. Manuals will be used to explain 'Position' method.
20. Next Steps:
   a. Practice hot folder removal or continue
Remove Hot Folder

1. Prerequisite:
   a. Click desktop shortcut to start SmartPDFPrintware
2. Select on top main menu bar the Hot Folders menu item
3. Hot Folder tab comes in to focus
4. Go to Hot Folders tree view
5. Select Hot Folder you want to delete.
   a. Example: Hot Folder name: ‘BulkMail’.
6. Select the item
7. Right Click the item
8. Select the Remove BulkMail menu item
9. Hot Folder ‘BulkMail’ is removed.
10. All views are updated.
11. Next Steps:
   a. Continue
Network Printers

SmartPDFPrintware sends XML job ticket followed by PDF document to the print controller using TCP/IP LPR / LPD protocol. For each FreeFlow Print Controller / DocuSP, you can add IP address, print queue names, and type of print engine it drives.

Add Network Printer

Network Printers management window

Step by Step Tutorial NP01-A: Add Network Printer

Adding Network Printer

1. Objectives
   a. Create a list of all the network printers that can receive and process SmartPDFPrintware output.

2. Prerequisites:
   a. Select Output Job Control XML Language
b. Decide which printers will process SmartPDFPrintware output. Find each printer’s
   i. Name, which identifies printer to you.
      1. Example: DT180HLC
   ii. IP Address, which identifies printer to the TCP/IP network.
   iii. Print Queue names. Each print controller can support multiple print queues. We suggest creating multiple print queues, each with meaningful name that helps identify it with a particular type of job.
   iv. Marking Engine: Black & White, Color, or Highlight Color
   v. Location and description of the printing system

c. Start SmartPDFPrintware software
d. Go to top menu bar
e. Find Resources menu item

3. Select the Resources menu
4. Select the Printers menu item
5. Window opens: Network Printers - SmartPDFPrintware

   B2BeDocuments

   a. 6. - - - - - Add first Network Printer - - - - -
7. Select the Name text box
8. Enter Name of the printing system.
9. Example: DC8000AP
10. Select the **Address** text box
11. Enter IP Address of the print server in dotted-decimal notation (nnn.nnn.nnn.nnn)
12. Example: 10.143.72.24
13. Select the **Queue** text box
14. Enter Print Queue
15. Example: print
16. Select the **Engine** list box
17. Click the scroll bar to bring in view the engine type
18. Select the engine type
19. Example: **Color** menu item
20. Select the **Description** text box
21. Enter Description
22. Example: DocuColor 8000AP Woodbridge NJ
23. Click the **Add** button
24. Printer will be added to the list.
25. To save the printer; click the **Save** button
26. - - - - - to more Print Queues - - - - -
27. If you want to add more print queue for the same printer,
28. enter another print queue in the Queue textbox.
29. Click the **Add** button
30. Save the printer setup. Click the **Save** button
31. - - - - - to add more Printers - - - - -
32. To add next network printer,
33. Click the **Clear** button. This will clear entries in name, IP Address, Queue, and description text boxes and unselect print engine in drop down list view.
34. Repeat above steps for each network printer you want to add to the network printer list.
35. Save the printer setup. Click the **Save** button
36. **Next Steps:**
   a. Now that you have added all the network printers, you will be able to use these during workflow setup in the Job Attributes window.
### Network Printers – after view

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<th>IPAddress</th>
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<th>Print</th>
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</thead>
<tbody>
<tr>
<td>DC5000</td>
<td>10.143.72.11</td>
<td>save</td>
<td>Color</td>
</tr>
<tr>
<td>DC5000</td>
<td>10.143.72.11</td>
<td>print</td>
<td>Color</td>
</tr>
<tr>
<td>DC8000AP</td>
<td>10.143.72.24</td>
<td>save</td>
<td>Color</td>
</tr>
<tr>
<td>DC8000AP</td>
<td>10.143.72.24</td>
<td>hold</td>
<td>Color</td>
</tr>
<tr>
<td>DC8000AP</td>
<td>10.143.72.24</td>
<td>power system</td>
<td>Color</td>
</tr>
<tr>
<td>DC8000AP</td>
<td>10.143.72.24</td>
<td>pwrsys</td>
<td>Color</td>
</tr>
<tr>
<td>DT180HLC</td>
<td>10.143.72.19</td>
<td>save</td>
<td>Highlight Color</td>
</tr>
<tr>
<td>DT180HLC</td>
<td>10.143.72.19</td>
<td>print</td>
<td>Highlight Color</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>IPAddress</th>
<th>Queue</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>iGen3</td>
<td>10.143.72.83</td>
<td>print</td>
<td>Color</td>
</tr>
<tr>
<td>Nuv144</td>
<td>10.143.72.71</td>
<td>save</td>
<td>Black and White</td>
</tr>
<tr>
<td>Nuv144</td>
<td>10.143.72.71</td>
<td>print</td>
<td>Black and White</td>
</tr>
<tr>
<td>Nuv144</td>
<td>10.143.72.71</td>
<td>hold</td>
<td>Black and White</td>
</tr>
<tr>
<td>Nuv144</td>
<td>10.143.72.71</td>
<td>webreports</td>
<td>Black and White</td>
</tr>
<tr>
<td>test</td>
<td>127.0.0.1</td>
<td>print</td>
<td>Black and White</td>
</tr>
</tbody>
</table>
**Edit Network Printer properties**

**Remove Network Printer**

We are combining edit of network printer properties and deletion of a printer entry in this tutorial.

**Step by Step Tutorial NP01-B: Edit, Remove Network Printer**

1. **Objective:**
   a. Edit network printer property, or
   b. Delete network printer entry

2. **Prerequisites:**
   a. Start SmartPDFPrintware software
   b. Go to top menu bar
   c. Find **Resources** menu item
   d. Select the **Resources** menu

3. Select the **Printers** menu item

4. Window opens: Network Printers - SmartPDFPrintware
   B2BeDocuments

5. - - - - - Edit Network Printer Properties - - - - -

6. Select a Network Printer in the list.

7. Example: the **DC8000AP** item

8. Click the **Edit** button

9. Software populates Name, IP Address, Queue, and Description text boxes and selects Engine type.

10. Edit entries in the text boxes and or select an engine.
11. Example: Change queue name from powersystem to pwrsys

12. Click the Add / Update button

13. - - - - - Delete Network Printer - - - - -

14. Select Network Printer to be deleted

15. Example: the DC8000AP item

16. Click the Delete button

17. Click the Save button

18. Next Steps:
   a. You can select a Network Printer in the Job Attributes window during workflow setup.
Job Attributes

Job Attributes window is common to all automation methods - Position, File Name, and Text On Page.

Job Attributes window - all fields marked * are required.

System

We customize of XML job tickets for each system. Selection of System lets SmartPDFPrintware set switches produce optimum job tickets for each system.

Network Printer

Select from the list network printer that represents “System” selected above.

Reprint Path

Software uses following default path for re-printing.

file:///var/spool/XRXnps/saved/

SmartPDFPrintware sends entire job only one time.
When you request multiple copies, SmartPDFPrintware will reprint original job by referencing it in the re-print job ticket with copies count set to number of copies requested.

Job
SmartPDFPrintware splits the job into logical segments. Each segment is assigned dynamically generated job name, which is based on current PDF document name. When you study entries in print queue, you will notice it. Job name you enter here will be used when more than one copy is requested.

Requesting User
Name of user who requests processing of this job.

Job Recipient
Person who should receive output of this job.

Number of Copies
When you request more than one copy of the job, SmartPDFPrintware re-prints originally ripped job multiple times by just issuing re-print job tickets. In other words, SmartPDFPrintware does not resend original job multiple times.

Collate
When requesting multiple copies, always check this box.
Step by Step Tutorial JA01: Job Attributes

1. Objectives:
   a. Select target printer,
   b. For job management enter job, user and recipient names
   c. Enter number of copies, and for multiple copies, select collation

2. Prerequisites:
   a. Start SmartPDFPrintware
   b. Select Setup menu
   c. Select to Position / File Name / Text On Page setup tab
      i. » Navigate to Hot Folder view (1)
      ii. » Select Hot Folder
      iii. » Right click Hot Folder
      iv. » Select Position / File Name / Text On Page Method
      v. » Load PDF(s)
      vi. » Navigate to Position / File Name / Text On Page Setup view (#2)
      vii. » Click on a Job Attributes node

3. Window opens: Job Attributes - B2BeDocuments™ SmartPDFPrintware™
   a.

4. Note required fields *Required

5. In Systems list, scroll up or down till your system is visible
   a. Example: the DocuColor iGen3 with DocuSP

6. If your system is not listed, please contact B2BeDocuments

7. In Network Printers list view, for System selected in Step #5, select printer.
   a. Example: iGen3
8. Adjust **Re-print Path** for above selected system

```
file:///var/spool/RXnps/saved/
```

9. Enter job name in the **Job** text box
   a. Example: Demo

10. Enter requesting user name in the **Requesting User** text box
    a. Example: Joe

11. Enter recipient name in the **Job Recipient** text box
    a. Example: Moe

12. Adjust **Number of Copies**

13. If you do not want multiple copies to be collated, please leave the **Collate All Subsets** check box Unchecked.

14. Otherwise, Select the **Collate All Sets** check box

15. Click the **Apply** button

16. Click the **OK** button

17. Next steps
   a. Continue with Automation – Job Scheduler setup

**Automation - Job Scheduler**

Job Scheduler window is common to all automation methods - Position, File Name, and Text On Page. SmartPDFPrintware Hot Folder Watcher in combination with timer can schedule print jobs interactively, at set Interval, Daily or initiate manually.
Manual

When job is setup for the first time, we highly recommend ‘Manual’ mode. It allows you to initiate printing when you are ready for test print of current job. This mode is also useful when jobs keep changing as in case of walkup print shops. You copy to Hot Folder all the PDF files in the job. You can manually initiate printing and finishing of PDF files by click on the ‘Print’ button.

Applications:
- During initial job setup and testing
- For quick turn around jobs in walkup, print shops
**Interactive**

This is real time job processing mode. This mode is useful in processing jobs that are initiated by remote users e.g. web based document procurement systems. You can set scheduler elapsed time value to be large enough so that it waits until the last file in job is received. Every time a file is dropped in to hot folder, timer will reset and start new count down. If no more files are received within user specified elapsed time period, schedule timer will time out and notify Hot Folder Watcher to begin processing PDF files that have been received. Software gathers all files received after last timer count down and will start processing it.

Applications: Customer submitted jobs via web-to-print store fronts; real time legacy system generated transaction reports, documents.

**Interval**

This mode enables you to collect jobs in a hot folder for set period before processing it. Depending on volume, you can collect jobs and process it say after 2 hours or 4 hours. Interval timer count down starts when you start Hot Folder Watcher. Interval scheduler notifies software to begin processing, after user specified interval period has lapsed. If any PDF files are received during the last interval period, software will gather these files and process it.

Applications: Automatic batch printing of transaction documents.

**Daily**

Daily scheduler notifies software to begin processing every twenty four hours at user specified time. If any PDF files are received during the last twenty four hour period, software will gather these files and process it.

Applications: web-to-print store front, automatic batch printing.
After Printing

Once job is processed, you have two options for what to do with processed files.

1. Move files to an archival folder or
2. Delete processed files

Move Files to Archival Folder

Archival folder for each workflow is located here:
<local_drive>\B2BeDocuments\SmartPDFPrintware\B2BeDocArchive\<hotfolder_name>.

After printing, we recommend printed documents be moved to B2BDocArchive mirror folder. We recommend periodic purging of archival folder.
Step by Step Tutorial JS01: Job Scheduler

1. Objective:
   a. After printing what to do with processed files

2. Prerequisites:
   a. Start SmartPDFPrintware

3. Select **Automation**

4. Window opens: **Hot Folder Automation**

5. Select the After Printing tab

6. Select the Move file to radio button

7. Click the Browse button

8. Select directory where printed PDF files are to be moved to

9. It must be under
   a. `<local_drive>\B2BeDocuments\SmartPDFPrintware\B2BeDocArchive`
   b. Folder must be mirror of Hot Folder being configured.

10. Click the scroll bar to locate the folder.

11. Click the OK button

12. Click the Save button

13. Next Steps:
   a. Continue with setup
Browse For Folder

Select the directory where printed PDF files be moved to

- B2BeDocArchive
  - AgentReport
  - AllStores
    - BulkMailing
  - ChernayDemo
  - ChoicePoint
  - City_Of_Sanibel
  - Demo0001
  - InvestmentStatement

Root - Archival Folders

Root - Hot Folders

Mirror Folder

Hot Folder
Job Building Objects

SmartPDFPrintware Objects are building blocks used in construction and assembly of variable documents. SmartPDFPrintware treats normal media, exception media, slip sheet, precut tab, banner page, cover, subset, and finishing as objects.

We will describe properties of these objects. We will show windows in which attributes of objects will be set. Properties of each object are extensible. Hence, in future, when system manufacturer adds new attributes to the object, we can quickly add support for it.
Media

SmartPDFPrintware media object enables you to select all the attributes that uniquely identifies a specific media to print controller.

To make sure print controller selects correct media, we recommend using at least three Media object attributes – Page Size, Color and Type.

Default Media, Normal Media, Exception Media, Precut Tab, Separator Page Slip Sheet, Cover, and Banner Page – all are Media objects. Appropriate selection of parameters and attributes will ensure correct selection of desired stock. Media object is capable of supporting all media types world over.

Using Media attribute selection window, you can select page size, media color, media type, whether it is drilled or not, specify weight in grams per square centimeter, whether it is coated, type of coating, direction of grain.

Note: For optimum print quality on color digital presses, it may be necessary to specify all Media attribute parameters.

Paper Tray Programming

On your Print Controller / Print Server, you must program “Paper Trays” for the Media attribute selected during a job setup. And you must load printing system Trays with paper stocks that matches with Tray programming.

Following screen shot of Media attribute selection window shows different choices available to you.
Media attribute selection window

Media Summary:
Size: Printer Default
Color: Printer Default
Type: Printer Default
Drilled: No
Weight: Printer Default
Sides Coated: Printer Default
Uncoated Finish: Printer Default
Grain: Printer Default
InputTray: Printer Default

Some of the features are supported only by specific printers. You may see more features or options listed here than what your specific printer may support.

- Default Paper
- Named Paper
- Size
- Color
- Type
- Drilled
- Weight
- Sides Coated
- Grain
- Input Tray

Media Object Attributes
Size

All page sizes used worldwide are supported including custom page sizes.

USA

<table>
<thead>
<tr>
<th>Size</th>
<th>Size</th>
<th>Size</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter (8.50&quot; x 11&quot;)</td>
<td>Legal (8.50&quot; x 14&quot;)</td>
<td>Tabloid (11&quot; x 17&quot;)</td>
<td>Tabloid Oversized (12&quot; x 18&quot;)</td>
</tr>
<tr>
<td>Envelope 9&quot; x 12&quot;</td>
<td>Letter Tab 9.5&quot; x 11&quot;</td>
<td>9&quot; x 11&quot;</td>
<td>8&quot; x 10&quot;</td>
</tr>
<tr>
<td>8&quot; x 13&quot;</td>
<td>9&quot; x 14&quot;</td>
<td>12&quot; x 16.5&quot;</td>
<td>Statement 5.5&quot; x 8.5&quot;</td>
</tr>
<tr>
<td>Executive 7.25&quot; x 10.5&quot;</td>
<td>Foolscape 8.5&quot; x 13&quot;</td>
<td>Envelope 6&quot; x 9&quot;</td>
<td>Envelope 7&quot; x 10&quot;</td>
</tr>
<tr>
<td>12.6&quot; x 18.5&quot;</td>
<td>Custom Media Size</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

European

<table>
<thead>
<tr>
<th>Size</th>
<th>Size</th>
<th>Size</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>A4 (210 mm x 297 mm)</td>
<td>A3 (297 x 420 mm)</td>
<td>A5 (148 x 210 mm)</td>
<td>Oversized A4 (223 x 297 mm)</td>
</tr>
<tr>
<td>SpanishXE (215 x 315 mm)</td>
<td>Standard 220 x 330 mm</td>
<td>210 x 270 mm</td>
<td>215 x 275 mm</td>
</tr>
<tr>
<td>226 x 310 mm</td>
<td>B5/JIS (182 x 257 mm)</td>
<td>B4/JIS (257 x 364 mm)</td>
<td>KAI8/8K (267 x 388 mm)</td>
</tr>
<tr>
<td>KAI16/16K (194 x 267 mm)</td>
<td>SB4 (252 x 358 mm)</td>
<td>SRA4 (225 x 320 mm)</td>
<td>Envelope (178 x 254 mm)</td>
</tr>
<tr>
<td>Oversized A5 (161 x 210 mm)</td>
<td>ISO B4 (250 x 353 mm)</td>
<td>C5 Envelope (162 x 229 mm)</td>
<td>Envelope (220 x 312 mm)</td>
</tr>
<tr>
<td>Custom Media Size</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Color

<table>
<thead>
<tr>
<th>Color</th>
<th>Blue</th>
<th>Yellow</th>
<th>Green</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pink</td>
<td>Buff</td>
<td>Goldenrod</td>
<td>Red</td>
</tr>
<tr>
<td>Ivory</td>
<td>Orange</td>
<td>Gray</td>
<td>Clear</td>
</tr>
<tr>
<td>Custom Color</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Type

<table>
<thead>
<tr>
<th>Plain Paper</th>
<th>Transparency</th>
<th>Recycled</th>
<th>Precut Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labels</td>
<td>Pre Printed</td>
<td>Full Cut Tab</td>
<td>Envelope</td>
</tr>
<tr>
<td>Ordered Stock</td>
<td>Custom</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Drilled

| Yes | No |

### Weight

Paper weight in GSM.

#### Sides Coated

<table>
<thead>
<tr>
<th>One Side Coated</th>
<th>Two Sides</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smooth</td>
<td>Coated</td>
</tr>
<tr>
<td>High Gloss</td>
<td>Regular</td>
</tr>
<tr>
<td></td>
<td>Rough</td>
</tr>
<tr>
<td></td>
<td>Gloss</td>
</tr>
<tr>
<td></td>
<td>Semi-Gloss</td>
</tr>
<tr>
<td></td>
<td>Satin</td>
</tr>
<tr>
<td></td>
<td>Matte</td>
</tr>
</tbody>
</table>

### Grain

<table>
<thead>
<tr>
<th>Grain Long</th>
<th>Grain Short</th>
</tr>
</thead>
</table>
Job Default Page Size

SmartPDFPrintware has time and labor saving feature that allows you to associate, in matter of minutes, wide variety of mixed paper sizes to normal and exception media objects.

You can set any page size as “job default page size”. In mixed page size job the default page size becomes a reference size. SmartPDFPrintware creates a list of all page sizes present in job. In this list you can select default page size to associate with Normal Media object. All other page sizes will be classified as exceptions and you can associate these exception sizes with appropriate Exception Media objects. As job is processed and job tickets are dynamically generated, these Exception Media objects will be used in job ticket page-overrides attributes.

When starting a new setup, we suggest first always set default Media object for the job. This will allow SmartPDFPrintware to initialize job setup GUI environment to highlight all other page sizes with light green background.

Benefit to you is
- you do not have to manually set page exception on each non-standard size page in job. Imagine trying to setup 30,000 page job with thousands of non-standard size pages randomly interspersed. Using SmartPDFPrintware you can set job up in about ten minutes – not days or weeks.
- you no longer have to write VIPP programs
- you no longer have to insert ‘setpagedevice’ commands in postscript files
Default Media

We will set default media object for a job.

Explanation Snippets DM01 – Default Media

1. Objective:
   a. Generic explanation
   b. Mixed page size setup using Position method
   c. Set job default Media object
   d. Show its effect on highlighting exception page sizes.

2. Prerequisites
   a. Hot Folder: MixedMedia
   b. Practice File: mixedmedia.pdf
   c. Method: Position
   d. Start SmartPDFPrintware

3. On top menu bar, Select the Setup menu item

4. Click on Position / File Name / Text On Page method

5. Navigate to Setup view (2). Top left tree view.

6. Select the item

7. window opens: **Media, Finishing, Sides, Output - Default**

8. Click the **V Select Media** button

9. Select the **Size** menu item

10. Select the **Letter (8.50" x 11")** menu item

11. Select the **Color** menu item

12. Select the **White** menu item

13. Select the **Type** menu item

14. Select the **Plain Paper** menu item

15. Click the scroll bar of **Two Sided Printing**
16. Select the **Two Sided Duplex - Flip on Long Edge** item

17. Click the **OK** button

18. We have set default page size for the job.

19. Next we want to show you importance of selecting default page size on mixed page size job

20. **Mixed Paper Sizes**

21. We are going to configure ‘MixedMedia’ hot folder using Position method.

22. Navigate to Hot Folder view (1).

23. Select Hot Folder

   a. Example: ‘MixedMedia’

24. Right Click on Hot Folder

25. Select the **Position** method

26. The Select PDF file(s) dialog opens

27. Select PDF file(s)

   a. Example: ‘MixedMedia.pdf’

28. Select the PDF file

29. Click the **Open** button

30. We now have loaded the document in SmartPDFPrintware workspace.

31. Comment:

   a. You notice all exception page sizes are highlighted. This makes it easy to associate different page sizes with appropriate paper stock.

   b. We wanted to show effect of default page size on mixed media job. You can select a different page size (e.g. 8.5 x 14) as a default page size and re-do the tutorial, you will notice that other page sizes are now exception page sizes.

32. Next steps:

   a. Become familiar with job building object Media, Finishing etc.

   b. Continue
Mixed Page Size job

List of different page sizes in job

Default Page Size

Exception Page Sizes

Default Page Size
Separator Slip Sheet

Separator sheets are used to separate ‘sets’ or ‘subsets’ from each other. Separator sheet is a Media object. It is a common practice to use non-white color e.g. Yellow, Blue or Green for separator sheet. This makes it easy to visually separate jobs.

SmartPDFPrintware makes it very easy to insert separator slip sheet at different variable locations in job. Location where you can insert depends on the automation method used.

Position


File Name

You can insert Separator Slip Sheet between documents and group of documents. See File Name method for step-by-step instructions.

Text On Page

You can insert Separator Slip Sheet between Sets. The sets are created by either splitting a document using static test, variable text or combination of static and variable text. See Text On Page method for step-by-step instructions.
**Precut Tab**

Precut tab is a Media object. It is media with tabs that are cut so that more than one tab is visible extending beyond the edge of a Normal page.

Precut tab media object attributes are used in ‘page override’ job template.

---

**Tab Sequence**

Total number of Precut Tabs that repeat in Sequence.
Variable Tab Text

Current practice is to print text on precut tab by shifting an image page by half inch to the right or left.

However, we think there is a better way. You need not prepare document with a dedicated tab text page.

We can extract variable text from the document property and apply it to Precut Tab.

Tab Variable Text source selection window

- Character Position
- Words
- Tab Text File
- Name Field

For Precut Tab, Use Variable Text

Source:
- Position: PDF File Name
- File Name: PDF File Name
- Text On Page: TextBox on page

OK Cancel
Variable Text Source

Source for variable text depends on automation method in use.

Job hot folder

![Job hot folder screenshot]

TabText.txt

![TabText.txt screenshot]
Position

Source: File Name

We can extract either characters in File Name by specifying minimum to maximum character position or number of words starting with first word.

External file called ‘TabText.txt’

You can specify external ‘TabText.txt’ file. It will use this to print text on precut tab sequence in which it is listed in TabText.txt file.

File Name

Source: File Name

We can extract either characters in File Name by specifying minimum to maximum character position or number of words starting with first word.

External Tab text file ‘TabText.txt’

You can specify external ‘TabText.txt’ file. It will use this to sequentially print text on precut tab.

Text On Page

Source: Text on page

You can select text within rectangular area on page to be printed on precut tab which will be inserted just before that page.

Variable Tab Text extraction methods are:

Character Positions

We can extract character string between starting and ending position of File Name.

Number of Words

We can extract number of words starting with first word of File Name.

External Tab text file ‘TabText.txt’

We can list variable tab text in ‘TabText.txt’ external file. SmartPDFPrintware will apply text in order in
which it appears in the list. You must make sure that tab text lines up with section where precut tab is to be inserted.
To illustrate Variable Tab text methods, please study following explanation.

Explanation Snippets PT01: Variable Tab Text

1. Objectives:
   2. Explain different methods to extract and print variable text on precut tab
   3. Use part of File Name to print on precut tab
   4. Use external text file ‘TabText.txt’ for variable text to be printed on precut tab.
5. Prerequisites:
   6. Start SmartPDFPrintware
   7. Select Setup menu
   8. Select Setup tab
   9. Select to Position method tab
10. » Navigate to Hot Folder view (1)
11. » Select Hot Folder
12. » Right click Hot Folder
13. » Select Position method
14. » Load PDF(s)
15. » Got to Document Position and Name view
16. click the **Doc Position** column header
17. Right Click the **Doc Position** column header
18. - - - - - **Insert Precut Tab** - - - - -
19. Select the **Select** menu item
20. Select the **Insert PreCut Tabs** menu item
21. window opens: Select Precut Tab
   
   a. - - - - - **Select Media** - - - - -

---

**Image:**
- Image 217x322 to 277x336
- Image 217x289 to 277x304
- Image 434x257 to 483x271
- Image 217x222 to 318x236
- Image 252x96 to 428x204
23. Click the V Select Media V button

24. Select the Size menu item

25. Select the Letter Tab 9" x 11" menu item

26. Select the Color menu item

27. Select the White menu item

28. Select Type: Precut Tab

29. Select the Type menu item

30. Select the Precut Tab menu item

31. Window opens: Media Type Precut Tab

![Media Type Precut Tab window]

32. Click the Up button till 5

33. Click the Media Type Precut Tab window OK button

34. Click the Select Precut Tab window OK button

35. Variable Text

36. Select only one of the following methods

37. Window opens: Precut Tab Variable Text

![Precut Tab Variable Text window]

38. Select the For Precut Tab, Use Variable Text check box

39. Character Position

40. Select the Character Position radio button
41. Click the **From Up** button till lower value is set
42. Click the **To Up** button till upper value is set
43. **OR** for Words
44. **- - - - - Words - - - - -**
45. Select the **Words** radio button
46. Click the **Up** button till word count is set
47. **OR** to use external TabText.txt file
48. **- - - - - External File - - - - -**
49. Select the **Tab Text File** radio button
50. Click the **Tab Text File** button
51. The Select 'TabText.txt' file dialog opens
52. Click the **Tab Text File** button
53. Select the **TabText.txt** file item
54. Click the **Open** button
55. Click the **OK** button
56. Variable Tab text will be applied to Precut Tab objects in Setup view.
57. **Comment:**
58. Use any one of the method to extract and print variable text on precut tab.
59. **Next Steps:**
   a. Continue
Mixed Page Sizes

Many users appended together large number of PDF files, each of which may be composed with different PDF Page Sizes. This combined PDF document may contain 8.5” x 11” letter size pages, followed by 11” x 17” tabloid size pages, followed by 8.5” x 11” letter size pages, followed by 8.5” x 14” legal size pages, followed by 11” x 17” size pages, in no particular order with unpredictable frequency. In such say 5000 page document there may be many, many transitions from one page size to next.

Using existing workflow solutions, print service provider is required to manually determine position of each non-standard size page – the exception page. PSP then uses it to manually mark position of each non-standard size page and associate it with appropriate paper stock. This manual process is time consuming and frightfully error prone.

SmartPDFPrintware™ does this automatically. It determines size of all PDF pages in a job, and creates a user friendly list of different Page Sizes. User uses this list to associate “Normal” page size and “Exception” page sizes to appropriate paper stocks. SmartPDFPrintware™ uses these associations to dynamically build print instruction job tickets with page override commands which drive digital printing system to print, non-stop, correctly collated mixed page size print jobs - switching from one paper size to next.

Normal Media

Page sizes such as 8.5 inch x 11 inch, white, plain paper in USA and A4 210 mm x 297 mm, white, plain paper in Europe would be, depending on Job, classified as Normal Media. It is up to you to set default Normal Media attributes for your job. SmartPDFPrintware uses this information to determine exception media for page overrides.

Exception Media

All page sizes, colors and types that are different from Normal Media would be classified as Exception Media.
**Page Override**

SmartPDFPrintware will generate ‘page-override’ command
- When job contains pages that differ in size from default page size.
- When different color or type is selected from default Media e.g. when default media is 8.5 x 11, white, plain paper and you want specific range of 8.5 x 11 pages to be printed on blue color, plain paper – Page Exceptions,

**Position**

**File Name**

**Text On Page**

The automation methods support mixed page size printing without manual intervention. We will explain how Normal Media and Exception Media properties are set by examples.

**Examples**

**Note**

When associating multiple page sizes to the same Media object, press down Ctrl key while selecting each page size.

First select Normal page size and associate it with Normal Media object. Next select exception page sizes to be associated with first Exception Media object. Repeat this for all other Exception Media objects.
Mixed Page Size Example #1 – Position method

Example Hot Folder: ‘MixedMedia’
Example File: ‘MixedMedia.pdf’

Explanation Snippets MP01-A: Load PDF(s)

Position method

1. Objectives:
   a. Associate job default page size to Normal Media object
   b. Associate each different, exception, page size with corresponding Exception Media object

2. Prerequisites:
   a. Start SmartPDFPrintware

3. Select Setup menu
4. Select Setup tab
5. Select Position method tab
6. Navigate to Hot Folder view (1)
7. Select Hot Folder MixedMedia
8. Right Click the item MixedMedia
9. Select the Position menu item
10. The Position Mode: Document Position List dialog opens
11. Select ‘MixedMedia.pdf’
12. Click the Yes button
13. PDF is loaded in workspace.
14. Next Steps:
   a. Continue with explanation
Mixed Page Sizes - before view - Position method

There are three different page sizes in the job.

- 8.5 x 11 and 11 x 8.5 is to be associated with Normal Media object 8.5 x 11, White, Plain Paper;
- 8.5 x 14 and 14 x 8.5 is to be associated with Exception Media object 8.5 x 14, White, Plain Paper
- 11 x 17 and 17 x 11 is to be associated with Exception Media object 11 x 17, White, Plain Paper
Explanation Snippets MP01-B: Mixed Page Sizes Position method

1. Objectives
   a. Associate page sizes with Media objects

2. Prerequisites:
   a. Complete explanation XXX

3. Navigate to Mixed Page Sizes view (#3)

4. Note: for multiple selections, press down ‘Ctrl’ key

5. - - - - - Normal Media example: 8.5 x 11 - - - - -

6. Select the item

   8.500 11.000

7. Select the item

   11.000 8.500

8. Release ‘Ctrl’ key

9. Right Click the item

10. Select the Normal Media menu item

11. Select the Select Media menu item

12. Window opens: select Normal Media

   a.

13. Click the V Select Media V button

14. Select the Size menu item

15. Select the Letter (8.50" x 11") menu item

16. Select the Color menu item

17. Select the White menu item

18. Select the Type menu item

19. Select the Plain Paper menu item
20. Click the scroll bar of Two Sided Printing
21. Select the Two Sided Duplex - Flip on Long Edge item
22. Click the OK button
23. First Exception Media example: 8.5 x 14
24. For multiple selections, press down ‘Ctrl’ key
25. Select the item
26. Select the item
27. Release ‘Ctrl’ key
28. Right Click the item
29. Select the Exception Media menu item
30. Select the Select Media menu item
31. window opens: select Exception Media
32. Click the V Select Media V button
33. Select the Size menu item
34. Select the Legal (8.50" x 14") menu item
35. Select the Color menu item
36. Select the White menu item
37. Select the Type menu item
38. Select the Plain Paper menu item
39. On Two Sided Printing
40. Select the One Sided Simplex item
41. Click the OK button

42. Second Exception Media example: 11 x 17

43. For multiple selections, press down ‘Ctrl’ key

44. Select the item

45. Select the item

46. Release ‘Ctrl’ key

47. Right Click the item

48. Select the Select Media menu item

49. window opens: select Exception Media

a.  

50. Click the V Select Media V button

51. Select the Size menu item

52. Select the Tabloid (11" x 17") menu item

53. Select the Color menu item

54. Select the White menu item

55. Select the Type menu item

56. Select the Plain Paper menu item

57. Select the One Sided Simplex item

58. Click the OK button

59. Click the Save button

60. Click the OK button

61. Next steps

### Mixed Page Sizes - after view – Position method

<table>
<thead>
<tr>
<th>Media</th>
<th>Width</th>
<th>Height</th>
<th>Mixed Size Normal/Exception Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.500</td>
<td>11.000</td>
<td></td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long Edge</td>
</tr>
<tr>
<td>8.500</td>
<td>14.000</td>
<td></td>
<td>Legal (8.50&quot; x 14&quot;), White, Plain Paper, One Sided</td>
</tr>
<tr>
<td>11.000</td>
<td>8.500</td>
<td></td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
</tr>
<tr>
<td>11.000</td>
<td>14.000</td>
<td></td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
</tr>
<tr>
<td>14.000</td>
<td>8.500</td>
<td></td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
</tr>
</tbody>
</table>

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Mixed Page Size Example #2 – File Name method

Example Hot Folder:  PowerSystems
Example File:  PowerSystem.zip

Explanation Snippet MP02-A: Load PDF(s) File Name method

1. Objectives:
   a. Associate job default page size to Normal Media object
   b. Associate each different, exception, page size with corresponding Exception Media object

2. Prerequisites:
   a. Start SmartPDFPrintware

3. Select Setup menu
4. Select Setup tab
5. Select File Name method tab
6. Navigate to Hot Folders view #1
7. Select the item
8. Right Click the item
9. Select the File Name menu item
10. - - - - - Do you want to use Previous Setup? - - - -
11. The Caution dialog opens
12. Click the No button
13. - - - - - select Field Separation Character - - - -
14. Navigate to Field Separator view #5
15. In list view, click the scroll bar
16. Select Field Separation Character
17. example: Select the Underscore '_' item
18. - - - - - Load PDF(s) - - - -
19. Click the Load PDF(s) button
20. SmartPDFPrintware updates views
21. Save setup
Mixed Paper Sizes - before view – File Name method

Note: Page sizes were set by Xerox DigiPath Production Software System when pages were scanned to PDF.

Explanation Snippet MP02-B: Mixed Page Sizes

1. Objectives:
   a. Associate page sizes with Media objects.
2. Mixed Page Sizes view (#3)
3. Prerequisites:
   a. Review explanation snippet MP02-A
4. For multiple selections, press down ‘Ctrl’ key
5. - - - - - Normal Media example: 8.5 x 11 - - - - -
6. Select the item

8.500  11.000
7. Select the item

8. Select the item

9. Select the item

10. Select the item

11. Select the item

12. Select the item

13. Select the item

14. Select the item

15. Select the item

16. Release ‘Ctrl’ key
17. Right Click the item

18. Select the **Normal Media** menu item

19. Select the **Select Media** menu item
20. window opens: select Normal Media

21. Click the V Select Media V button

22. Select the Size menu item
23. Select the Letter (8.50” x 11") menu item

24. Select the Color menu item
25. Select the **White** menu item
26. Select the Type menu item
27. Select the Plain Paper menu item
28. Click the scroll bar of Two Sided Printing
29. Select the Two Sided Duplex - Flip on Long Edge item
30. Click the OK button
31. - - - - - First Exception Media example: 11 x 17
32. For multiple selections, press down ‘Ctrl’ key
33. Select the item
34. Select the item
35. Select the item
36. Release ‘Ctrl’ key
37. Right Click the item
38. Select the Exception Media menu item
39. Select the Select Media menu item
40. window opens: select Exception Media

a. Click the V Select Media V button
41. Select the Size menu item
42. Select the Tabloid (11" x 17") menu item
43. Select the Color menu item
44. Select the White menu item
45. Select the Type menu item
47. Select the **Plain Paper** menu item

48. Click the scroll bar of Two Sided Printing

49. Select the One Sided Simplex item

50. Click the **OK** button

51. Next steps:
   a. Continue
### Mixed Page Sizes - after view — File Name method

<table>
<thead>
<tr>
<th>Media</th>
<th>Width</th>
<th>Height</th>
<th>Mixed Size Normal/Exception Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.500</td>
<td>11.000</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>11.000</td>
<td>17.000</td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
<td></td>
</tr>
<tr>
<td>8.500</td>
<td>10.986</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.264</td>
<td>11.654</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.639</td>
<td>10.972</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.500</td>
<td>11.014</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.500</td>
<td>11.056</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>14.400</td>
<td>11.000</td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
<td></td>
</tr>
<tr>
<td>8.514</td>
<td>11.014</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.528</td>
<td>13.986</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>17.820</td>
<td>10.986</td>
<td>Tabloid (11&quot; x 17&quot;), White, Plain Paper, One Sided</td>
<td></td>
</tr>
<tr>
<td>8.444</td>
<td>10.944</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
<tr>
<td>8.486</td>
<td>11.000</td>
<td>Letter (8.50&quot; x 11&quot;), White, Plain Paper, Flip on Long...</td>
<td></td>
</tr>
</tbody>
</table>
Page Exception
Page exception allows you to select different Media from that of a job default - Normal Media object. For example: Let us say default job media page size is 8.5 x 11, white, plain paper (stationary), and you want to print say page number 5 of a document on letter size blue color paper – 8.5 x 11, blue, plain paper, to select a different media, you will set page exception for page number 5.

Page Override
For each Page Exception SmartPDFPrintware will generate Page Override command and add to the job ticket.

Position
Page Exception control is accessible when you click on a Page Number node in Position Setup (2) view.

File Name
Page Exception control is accessible when you click on a Page Number node in File Name Setup (2) view.

Text On Page
Page Exception control is accessible when you click on a Page Number node in Text On Page Setup (2) view.
Example Page Exception

To explain steps involved in setting Page Exception, we are going to use PowerSystems Position method.

Hot Folder: PowerSystem
File: PowerSystem.zip

Page Exception - before view — Position method

Explanation Snippet PE01-A: Page Exception Position method

1. Objectives:
   a. Select a different media for a specific page in the document

2. Prerequisites:
   a. Start SmartPDFPrintware
   b. Select Setup menu
   c. Select Setup tab
   d. Select Position method tab
   e. Navigate to Hot Folder view (1)
   f. Select Hot Folder
      i. Example: PowerSystem
   g. Right click Hot Folder
   h. Select Position method
   i. Load PDF(s)
i. Example: Select all PDFs in PowerSystem hot folder.

3. Navigate to Position setup view (#2)
4. Double click on a document name
5. Page numbers should be visible
6. Select a page number for which Media Exception is being set.
7. Select Page Number
   a. Example: page number 5
8. Right Click the item
9. Select the **Page 5 Media Exception** menu item
10. window opens: **Mixed Media Page Override - B2BeDocuments™ SmartPDFPrintware™**

   a. Click the **Select Media** button
11. Select the **Size** menu item
12. Select the **Letter (8.50" x 11")** menu item
13. Select the **Color** menu item
14. Select the **Blue** menu item
15. Select the **Type** menu item
16. Select the **Plain Paper** menu item
17. Click the scroll bar of **Two Sided Printing**
18. Select the One Sided Simplex item
19. Click the **OK** button
20. Next steps:
    a. Continue with explanations
Page Exception - after view – Position method
Insert Sheet
SmartPDFPrintware Insert Sheet object allows you to combine pre-printed color pages with black & white pages into complex documents. Operators can load the pre-printed pages in printing system Interposer to let intelligence of print controller to merge them into collated sets.

SmartPDFPrintware dynamically builds ‘insert-sheet’ command and inserts it in the xml job ticket.

Position
Insert Sheet control is accessible when you click on a Page Number node in Position Setup (2) view.

File Name
Insert Sheet control is accessible when you click on a Page Number node in File Name Setup (2) view.

Text On Page
Insert Sheet control is accessible when you click on a Page Number node in Text On Page Setup (2) view.
Example: Insert Sheet

To explain steps involved in Inserting Sheets at a particular position within job, we are going to use SunPower Position method.

Hot Folder: SunPower
File: SunPower.zip
Method: Position

Please study next screen shots before moving on to explanation snippets that follows.

Insert Sheet - before view – Position Method

Insert Sheet window
Explanation Snippets IS01-A: Insert Sheet Position method

1. Objectives:
   a. Insert pre-printed pages within a job.
   b. SmartPDFPrintware will generate page insertion commands to instruct Interposer to insert preprinted pages, bypassing imager.

2. Prerequisites:
   a. Start SmartPDFPrintware
   b. Select Setup menu
   c. Select Setup tab
   d. Select Position method tab
   e. Navigate to Hot Folder view (1)
   f. Select Hot Folder
      i. Example: SunPower
   g. Right click Hot Folder
   h. Select Position method
   i. Load PDF(s)
      i. Example: Select all PDFs in SunPower hot folder.

3. Navigate to Position setup view (#2)
4. Double click document in which you want to insert pre-printed pages.

5. Page numbers should be visible
6. Select a page number at which a media is to be inserted.
7. Select Page Number
   a. Example: page number 4

8. Right Click page number
   a. Example:

9. Select the Insert Sheet @ <page_number> menu item
   a. Example: Insert Sheet @ 4

10. Window opens: Insert Sheets - B2BeDocuments™ SmartPDFPrintware™
11. **Note**: You can insert sheets before or after a page. This enables insertion before page One, if that is what your job requires.

12. Select the **After** item

13. Select the **Page Number** text box

14. Click the **V Select Media V** button

15. Select the **Size** menu item

16. Select the **Letter (8.50" x 11")** menu item

17. Select the **Color** menu item

18. Select the **Green** menu item

19. Select the **Type** menu item

20. Select the **Pre_Printed** menu item

21. Go to **Insert Quantity** count.

22. Click the **Up** button

23. Select the **2** text box

24. Click the **OK** button

25. Next steps:
   a. Continue with explanation

**Insert Sheet - after view - Position Method**
Covers

You can add a Cover - Front, Back, or Both – blank or pre-printed. System may use Interposer or optional Covers Insertion module to produce professional looking documents.

SmartPDFPrintware dynamically builds ‘cover-front’ and or ‘cover-back’ commands and inserts it in the XML job ticket.

Position
Covers control is accessible when you click on Document(s) node in Position Setup (2) view.

File Name
Covers control is accessible when you click on Document(s) node in File Name Setup (2) view.

Text On Page
Covers control is accessible when you click on Document(s) node in Text On Setup (2) view.
Example: Cover

To explain steps involved in inserting Covers, we are going to use SunPower Position method.

Hot Folder: SunPower
File: SunPower.zip
Method: Position

Please study next screen shots before moving on to explanation snippets that follows.

Covers - before view – Position method

Covers attributes selection window
Explanation Snippets CV01-A: Insert Covers Position method

1. Objectives:
2. Apply covers to documents, or group of documents.
3. You can specify either front or back or both covers.

4. Prerequisites:
5. Start SmartPDFPrintware
6. Select Setup menu
7. Select Setup tab
8. Select Position method tab
9. » Navigate to Hot Folder view (1)
10. » Select Hot Folder
11. » Right click Hot Folder
12. » Select Position method
13. » Load PDF(s)
14. » Navigate to Position setup view (#2)
15. » Double click on a document name
16. » Page numbers should be visible
17. » select Documents(s) node.
18. Select the item Document(s)
19. Right Click the item Document(s)
20. Select the Covers menu item Covers

21. window opens: Covers Selection - SmartPDFPrintware™ B2BeDocuments™

a. 
22. Click the scroll bar
23. Click the scroll bar
24. Select the Front and Back: Different item
25. - - - - - Front Cover - - - - -
26. Click the V Select Media V button
27. Select the **Size** menu item

28. Select the **Letter (8.50" x 11")** menu item

29. Select the **Color** menu item

30. Select the **Ivory** menu item

31. Select the **Type** menu item

32. Select the **Recycled** menu item

33. In Printing option, Select the **Pre-Printed** item

34. **Back Cover**

35. Click the **Select Media** button

36. Select the **Size** menu item

37. Select the **Letter (8.50" x 11")** menu item

38. Select the **Color** menu item

39. Select the **White** menu item

40. Select the **Type** menu item

41. Select the **Recycled** menu item

42. In Printing option, Select the **Blank** item

43. Click the **OK** button

44. Next steps:

45. Continue with Position method setup
Front Cover - after view – Position method

- Position
  - Media Attributes
    - Media, Finishing, Sides, Output - Default
  - Automation
- Document(s)
  - Front Cover
    - Media
      - Letter [8.50" x 11"], Ivory, Recycled,
    - Printing
      - Pre-Printed
- Altair Taurus 60 Gas Turbine Manual.pdf
  - 1
  - 2
  - 3
Back Cover - after view – Position method
Banner Page
Banner page can be printed with optional information which may include file name, group id, media called, print sequence number and number of pages in the set. This information may be useful in many applications including bulk mailing.

Job

Group

Document

Set

Position
At this time, there is no Banner page control in Position method – because no one asked for it. If you have a challenging application, please let us know.

File Name
Banner Pages can be printed at beginning of Group of Documents or at beginning of each document.

Text On Page
Banner Page can be printed at beginning of each Set, which is created by splitting a large document.
Example Group Banner Page – File Name method

To explain steps involved in setting Group Banner Page selection, we are going to use BulkMail File Name method.

Hot Folder: BulkMail
File: BulkMail.zip
Method: File Name

Please study next screen shots before moving on to explanation snippets that follows.

Group Banner - before view – File Name method

Banner attributes selection window

Some of the features are supported only by specific printers. You may see more features or options listed here than what your specific printer may support.
Explanation Snippets BP01-A: Insert Group Banner Page File Name method

1. Objectives:
   a. Insert Banner before each Group of documents

2. Prerequisites:
   a. Click desktop shortcut to start SmartPDFPrintware

3. Select Setup menu on Main Menu Bar.

4. SmartPDFPrintware window changes to Setup

5. Select the Setup menu item

6. Select the File Name tab

7. Navigate to Hot Folders (#1) view

8. Select hot folder ‘BulkMail’

9. Right Click hot folder ‘BulkMail’

10. Select the File Name menu item

11. Select Field Separation Character

12. Navigate to Field Separation Character view #5

13. To bring in view Field Separation Character for your job, click scroll bar up or down.
   a. Example: Select the Underscore ‘_’ item

14. Load PDF(s)

15. Click the Load PDF(s) button

16. Navigate to File Name Fields view (6)
17. Scroll left or right to bring in view column header **Field01**
18. Select the **Field01** column header
19. Right Click the Field01 column header
20. Select the 'use-same-values' in Field01 to menu item
21. Select the **Group for Printing** menu item
22. SmartPDFPrintware adds new nodes to File Name setup view (2)
23. Navigate to File Name setup view (2)
24. Navigate to node ‘**Fields**’
25. Navigate to node ‘**Field01**’
26. Navigate to node ‘**UseSameValues**’
27. Navigate to node ‘**Group Documents**’
28. Select the item [Group Documents]
29. Right Click the item [Group Documents]
30. A window pops up
31. Select the **Group Banner Page** menu item
32. window opens: Select **Group Banner Page**
33. Click the V Select Media V button
34. Select the **Size** menu item
35. Select the **Letter (8.50" x 11")** menu item
36. Select the **Color** menu item
37. Select the **Blue** menu item
38. Select the **Type** menu item
39. Select the **Plain Paper** menu item

40. Click the OK button

41. Next Steps:
   a. continue

**Group Banner - after view – File Name method**

![SmartPDFPrintware Enterprise Edition Banner](image)
Sides Simplex Duplex

Long-Edge Short-Edge The page turns on the short side, regardless of orientation

One Sided
Page is imaged on one side.

Two Sided Long Edge
The page is imaged on two sides. The page turns on the long side, regardless of orientation.

Two Sided Short Edge
The page is imaged on two sides. The page turns on the short side, regardless of orientation
Finishing

You can easily produce each variable document which is stapled, hole punched, folded, turned into booklet etc. You can quickly specify subset finishing such as subset stapling, subset hoe punching etc.

SmartPDFPrintware will generate ‘finishings’ XML command and add it to the job ticket.

Finishing attributes selection window

Staple

<table>
<thead>
<tr>
<th>1 Staple Top Left Portrait</th>
<th>1 Staple Top Left Landscape</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Staple Top Right Portrait</td>
<td>1 Staple Top Right Landscape</td>
</tr>
<tr>
<td>1 Staple Bottom Left Portrait</td>
<td>1 Staple Bottom Left Landscape</td>
</tr>
<tr>
<td>1 Staple Bottom Left Portrait</td>
<td>1 Staple Bottom Left Landscape</td>
</tr>
<tr>
<td>1 Staple Mixed Sizes</td>
<td></td>
</tr>
</tbody>
</table>
2 Staples Left Portrait 2 Staples Left Landscape
2 Staples Top Portrait 2 Staples Top Landscape
2 Staples Right Portrait 2 Staples Right Landscape
2 Staples Bottom Portrait 2 Staples Bottom Landscape

**Hole Punch**

Two Holes

<table>
<thead>
<tr>
<th>Left Portrait</th>
<th>Left Landscape</th>
<th>Top Portrait</th>
<th>Top Landscape</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Portrait</td>
<td>Right Landscape</td>
<td>Bottom Portrait</td>
<td>Bottom Landscape</td>
</tr>
</tbody>
</table>

On Mixed Sizes

Three Holes

<table>
<thead>
<tr>
<th>Left Portrait</th>
<th>Left Landscape</th>
<th>Top Portrait</th>
<th>Top Landscape</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Portrait</td>
<td>Right Landscape</td>
<td>Bottom Portrait</td>
<td>Bottom Landscape</td>
</tr>
</tbody>
</table>

On Mixed Sizes

Four Holes

<table>
<thead>
<tr>
<th>Left Portrait</th>
<th>Left Landscape</th>
<th>Top Portrait</th>
<th>Top Landscape</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right Portrait</td>
<td>Right Landscape</td>
<td>Bottom Portrait</td>
<td>Bottom Landscape</td>
</tr>
</tbody>
</table>

On Mixed Sizes

**Fold**

<table>
<thead>
<tr>
<th>Z Fold Left Bind Half Sheet</th>
<th>Z Fold Right Bind Half Sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Z Tri-Fold Print Inside Single Sheets</td>
<td>Z Tri-Fold Print Outside Single Sheets</td>
</tr>
<tr>
<td>C Tri-Fold Print Inside Single Sheets</td>
<td>C Tri-Fold Print Outside Single Sheets</td>
</tr>
<tr>
<td>Bi-Fold Print Inside Single Sheets</td>
<td>Bi-Fold Print Outside Single Sheets</td>
</tr>
<tr>
<td>Bi-Fold Multiple Sheets</td>
<td>Bi-Fold Multiple Sheets Staple</td>
</tr>
</tbody>
</table>
**Bind**

<table>
<thead>
<tr>
<th>Bind Left Portrait</th>
<th>Bind Right Portrait</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bind Top Landscape</td>
<td>Bind Bottom Landscape</td>
</tr>
</tbody>
</table>

**Booklet Creation**

**Booklet Maker**
Position
You can create subsets and call for Subset Finishing.

Please study Position method tutorial P01-G.

File Name
You can associate a Field with Finishing control.

You can associate Field parameter to a specific Finishing object e.g staple, punch, fold etc.

Please study File Name method tutorial FN01-C.

Text On Page
We are waiting for a challenging job that uses Text On Page to do conditional Finishing. If you got one, please contact us.
Subsets
You can logically separate a PDF document into group of pages called Subsets. This separation is needed when you want different finishing for different subsets in job. Subsets are also required when different paper stock is called for range of pages in job.

Media
Subsets enable use of different paper stocks in same job.

Sides
Subsets enable switching from simplex to duplex to simple printing in same job.

Finishing
Subsets enable different finishing on parts of job.
Group for Printing

When large numbers of documents are copied, FTPed, dragged and dropped into a live, active hot folder, if processing is not controlled, small file that must be printed last will jump over a large file that is still being copied when it should be printed first.

Position

File Name
SmartPDFPrintware using File Name method gives you total control over how documents print out. File Name method enables extensive Grouping of documents.

Text On Page
## Printing Sequence

You have total control over order in which each file in a job prints.

To control print sequence of documents in a job, you do not have to rename documents alphabetically so that print controller can use alphabetical-order printing. SmartPDFPrintware offers you better, easier print controls.

## Position

In Position method, you have two ways of controlling print sequence.

1. Once job is loaded into workspace, you can drag and drop PDF files in to desired print order. SmartPDFPrintware will create print sequence control file ‘Position.txt’ that is used to ensure correct print order. Please study step by step tutorial P01-B.

2. When there are say couple of hundred files in a job to be printed in specific sequence, you can list these files in desired print order in an external file ‘Position.txt’. Many times it is desirable to assign PDF file meaningful name that is indicative of its content or subject matter. In this situation if first file you want to print starts will letter Z, you are going to be out of luck if you are required to alphabetically name these files to control print sequence. SmartPDFPrintware does not require you to name file alphabetically to control print sequence. Please study step-by-step tutorial P01-C.
Job hot folder

Print Sequence control – external file Position.txt
**File Name**

You can incorporate numeric print order of PDF documents in one of the Fields in its file name. Please study step-by-step tutorial FN01-B.

**Text On Page**

We anticipate use of Text On Page method usually with one large document that is to be intelligently split up. Hence, question print control does not arise.
Collated
You can obtain collated output that eliminates need for manual collation of complex mixed media, mixed page size jobs.

Number of Copies
SmartPDFPrintware uses the save and reprint facility of DocuSP.

If only one copy of the job is requested, it will generate XML job ticket with <job-save-disposition> attribute set to ‘none’.

When multiple copies of job are requested, SmartPDFPrintware will send the original job with <job-save-disposition> attribute set to ‘print-save’. Without re-send the entire job, it will print from copy number two onward to the end by issuing re-print job ticket.

Reprint Path
SmartPDFPrintware uses following default path for re-printing.
file:///var/spool/XRXnps/saved/<document.pdf>

You can change default save folder path in the Job Attributes window.

End of Set Signal
Many times, it is a job requirement to send ‘End of set’ signal at the end of a document, at the end of set, at the end of a subset so that inline finishing equipment such as a booklet maker (e.g. C. P. Bourg) will process received pages and produce a booklet. SmartPDFPrintware generates this signal easily.
Position

Position method is similar to print workflow solutions you may be familiar with to which we have added significant time and labor saving enhancements to easily handle mixed page sizes, subset creation, subset media switching, subset sides switching, subset finishing, extremely flexible control of print sequence of documents, and more.

In Position method, you can set most jobs up in about ten (10) minutes. If it takes hours and days to setup page exceptions and page overrides using your current solution than you should look in to Position method.

Position method enables you to control variable media, sides, finishing selection for each document in the job, for each subset of a document and for each page in the document. You can insert separator slip-sheet between documents and between subsets. You can insert Precut Tabs before a document; apply variable text to the Precut Tab. You can insert preprinted pages.

Job Control Hierarchy

Job « Documents « Document « Subset « Page

SmartPDFPrintware gives you total control over selection of media, sides, finishing down to page level. Also, you control where slip sheet, inserts, and pre-cut tabs are inserted.
Navigation within Position method window

During explanation of various features and capabilities of Position method, we will be referring to different views within Position method window. Please familiarize with these views.
Hot Folders (1)
In Hot Folders view, you see listing of all the hot folders that you have added to SmartPDFPrintware.

Position Setup (2)
Position Setup view displays results of your setup, configuration activities. You can see the relationship between a process control, conditional operator that uses parameter to affect resulting action. It displays in a tree view list of documents loaded in workspace.

Mixed Page Sizes (3)
When job is loaded in workspace, SmartPDFPrintware traverses through all the documents. It calculates each page size. It displays each different page size in “Mixed Page Size” view. In this view, you can set one page size (e.g. 8.5 inch x 11 inch or 210 mm x 297 mm) to be associated with “Normal Media” object; and declare all other page sizes to be exception sizes and associate each exception size with corresponding “Exception Media” object.

Document Position and Name (4)
In this view Document position number with its file name is displayed.

Print Sequence: When job is loaded in to workspace, depending on name of files, documents may load in alphabetical order. Position of the file determines its print sequence. You can re-position document by dragging and dropping it in a new location in this list view. This helps you control print sequence of documents in job. When you adjust position of document, behind the scene SmartPDFPrintware updates an external file called “Position.txt”. This file is located in current hot folder you are setting up. As you will see shortly, you can use this external file to control print sequence of large number of documents in a job.
Activate a Document: When there are multiple documents in the job, you have to activate document before it is displayed in Current Page (6) view. Also, to split a document into subsets, it must be activated.

Controls: In this view, when you right click on column heading “Doc Position”, you gain access to precut tab and slip sheet controls.

Document Precut Tab: Access control to insert Precut Tab before each document in the job.

Document Position Page Position and Size (5)
This view displays Document Position Number, Page Number – page number always start at 1 for each document, page width and height of each page. All exception pages are highlighted with light green background.

In this view, you can split each document in to subsets by double clicking on Starting Page Number of each subset.

Current Page (6)
This view displays PDF page of current active document. You can scroll through active document using left or right navigation buttons. You can zoom in or zoom out image.

Position method Features and Capabilities Tutorials
We will explain Position method by using PDF documents in tutorial hot folder ‘SunPower’. This hot folder is created and practice files copied to it when you install tutorials. It contains 11 PDF documents. Here is a screenshot of all documents in the hot folder.
Set Job Default Page Size and Sides

Load PDF(s)

We are going to show for tutorial job, how default page size is set and how documents are loaded in to workspace.

About Default Page Size
Factory default page size for USA is 8.5 x 11, White, Plain Paper (Stationary) and for Europe, it is A4 210 mm x 297 mm, White, Plain Paper. You can change default size to what your job requires.

Step by Step Tutorial #P01: SolarPower

Step by Step Tutorial #P01-A: Page Size, Load

1. Objectives:
   a. Set job default page size and sides.
b. Load PDF documents in to the workspace.
c. Associate job default page size to Normal Media object
d. Associate each different, exception, page size with corresponding Exception Media object
e. Hot Folder: ‘SolarPower’
f. FYI: Location of ‘SolarPower’ hot folder is <localdrive>\B2BeDocuments\SmartPDFPrint\ware\B2BeDocHotFolders\SolarPower
h. There are eleven PDF files, one file for each chapter in the maintenance manual

2. Prerequisites:

a. Click desktop shortcut to start SmartPDFPrintware
b. Add your printer to the Network Printer list, if you have not added it previously.
c. Follow step-by-step tutorial on how to add network printer to the list.
d. Select Setup menu on Main Menu Bar.

e. Select the Setup menu item
f. SmartPDFPrintware window changes to Setup
g. Select Position method tab
h. Navigate to Hot Folder view (1)

3. Select the Position tab

4. - - - - - Set Default Page Size, Side - - - - -
5. Go to Position setup view (#2)
6. Select the item
7. window opens: Media, Finishing, Output - Default Job
a. 8. Click the V Select Media V button

9. Select the Letter (8.50” x 11”) menu item

10. Select the White menu item

11. Select the Plain Paper menu item

12. Click the scroll bar of Simplex Duplex

13. Select the Two Sided Duplex - Flip on Long Edge item

14. Click the OK button

15. - - - - - Load PDF files - - - - -

16. Go to Hot Folder (1) view

17. Select the item

18. Right Click the item

19. Select the Position menu item

20. The Select PDF file(s) dialog opens

21. To select multiple files,

22. for specific selection press down Ctrl key or

23. to select all files press down Shift key and

select first and last file in the dialog.

a. Example: Select the Altair Taurus 60 Gas Turbine Manual.pdf item

b. Example: Select the Voith Turbo VORECON RWE 11F6 Manual.pdf item

24. Click the Open button
25. Position method view is now initialized and ready for setup.
26. Next Step:
27. Continue
Controlling Print Sequence

When you want to print large number of files in a specific sequence, many workflow solutions force you to re-name files in alphabetic order and use alphabetic order printing options to control the print sequence. What if there are couple of hundred files that must be printed in specific sequence? What would happen if you make mistake in alphabetic order? Name of each file must be reflective of what it contains – not to control print sequence.

You can control sequence in which documents in a job prints without resorting to alphabetic re-naming of files. With SmartPDFPrintware, you have two choices to establish print sequence. First choice is to load PDF documents in to Position method workspace. Than drag and drop files into desired position in printing sequence. Second choice is, when there are large number of documents, to use an external file ‘Position.txt’ in which you can list name of each document order in which you want to print it. Since, in SmartPDFPrintware, you are not forced to change name of file, the file name helps you set correct print sequence in ‘Position.txt’.

Note: Print queue on print controller must be set for FIFO processing.

We are going to explain print sequence control methods ‘Drag and Drop’ and ‘Position.txt’.
Drag and Drop
When PDF files are initially loaded, these files may load in alphabetical order. You can drag and drop files in to desired position in Document Position and Name view #4.

Drag and drop print sequence control - starting view – Position method.

Windows lists files in alphabetical order which we can change using drag and drop method.
Step by Step Tutorial #P01-B: Drag and Drop Print Sequence control

1. Objective:
   a. Control print order without renaming PDF files
   b. Use drag and drop method to rearrange the print order of PDF documents in the job.
2. Prerequisites:
   a. Complete tutorial #P01-A
3. Select a document you wish to re-position in the print sequence.
4. Drag it to the desired position – either move it up or move it down in list.
5. Repeat drag and drop process till all files are in correct order – print sequence.
6. Software will re-initialize all views and update ‘Position.txt’ file.
7. Example: Select the **Universal 44-111-AB Silencer Manual.pdf** item
   
   |
8. drag and drop it to position 1
9. Software re-initializes all views.
11. Select the **Altair Taurus 60 Gas Turbine Manual.pdf** item

   | 2  | Altair Taurus 60 Gas Turbine Manual.pdf |
   |
12. drag and drop it to a new position
13. Software re-initializes all views.
15. Select the **Voith Turbo VORECON RWE 11F6 Manual.pdf** item

   | 2  | Voith Turbo VORECON RWE 11F6 Manual.pdf |
   |
16. drag and drop it to a new position
17. Software re-initializes all views.
19. Select the **Kato 17132 Power Transmission.pdf** item

20. Drag and drop it to a new position

21. Software re-initializes all views.


23. Next Steps:
   a. Continue

---

Drag and drop – print sequence control - ending view – Position method.
Control Print Sequence using external file ‘Position.txt’

When there are large number of files in a job, use of external ‘Position.txt’ allows you to control easily print order of each file in the job. This feature is most useful in walkup print centers. Print buyer knows print order of each document in the job. Buyer can using text editor such as Notepad create a text file. In this text file, buyer enters name of each PDF file on a separate line i.e. one file name per line. File on line number One will print first, file on line number Two will print second, file on line number Three will print third, etc. This file, which lists PDF files order in which are to be printed, is called ‘Position.txt’ file and print buyer can submit it along with the documents to be printed.

Job hot folder

![Job hot folder with files]

External File
Print Sequence control
Position.txt
Print Sequence control – external file Position.txt

Location of ‘Position.txt’
When a hot folder is setup to use Position method, than that folder will contain its own ‘Position.txt’ print sequence control file.

When your customer supplies you job with ‘Position.txt’ than all the documents along with ‘Position.txt’ to the work hot folder.

Path for ‘Position.txt’
<local_drive>\B2BeDocuments\SmartPDFPrintware\B2BeDocHotFolders\<hotfolder>\Position.txt
where <local_drive> is where SmartPDFPrintware software is installed and <hotfolder> is folder being setup for Position method workflow.

Important step during Load PDF(s)
When job is loaded into the Position method setup workspace, if SmartPDFPrintware detects presence of ‘Position.txt’ file in the hot folder, it will give you option to use it to control loading of PDF files in to workspace using sequence specified in ‘Position.txt’. This is very useful when you are trying to setup job involving large number of files.
Position Mode: Document Position List

You can use list in "Position.txt" present in hot folder 'SolarPower' to control print sequence of PDF File(s). Do you want to use it?

[ ] Yes  [ ] No
External ‘Position.txt’ file. Lists each PDF file name order in which it is to be printed.

Step by Step Tutorial #P01-C: External ‘Position.txt’ Print Sequence control

1. Objectives:
   a. To control print sequence, use external ‘Position.txt’ file.

2. Prerequisites:
   a. Start SmartPDFPrintware
   b. Select Setup tab
   c. Switch to Position method tab
   d. Set default page size – refer to tutorial #P01
   e. Navigate to Hot Folder view (1)
   f. Select Hot Folder
   g. Right click Hot Folder

3. Select the item

4. Right Click the item

5. Select the Position menu item
6. The Position Mode: Document Position List dialog opens

![Position Mode: Document Position List dialog]

You can use list in "Position.txt" present in hot folder 'SolarPower' to control print sequence of PDF File(s). Do you want to use it?

Yes  No

7.

8. Click the Yes button

9. Notice documents are loaded in to workspace order in which these are listed in print sequence control file 'Position.txt'.

10. Next Steps:
    a. Continue
Activate Document

When you want to split a document into subsets, you have to activate that document. To activate document, in Document Position and Name (4) view, double click on it. Active document position number is displayed and in view #5, document position numbers are highlighted in light blue background.

Current Document View

![Current Document View](image-url)
Step by Step Tutorial P01-D Activate Document

1. Objective:
   a. Activate Document
2. Prerequisite:
   a. Complete either tutorial #P01-B or tutorial #P01-C
3. To activate a document, double click on it in Document Position and Name (4) view.
4. To activate **Graver Technologies CPHH-130 Fuel Filtration Manual.pdf**
5. double clicking on it
6. Now you split it to subsets, or scroll through the document.
7. To create subsets of **MTE Series RL Line Load Reactors Manual.pdf** you can activate it by double clicking on it
8. Next Steps:
   a. Continue
Documents

After job, documents are next level down in job control hierarchy. Once the documents are loaded into workspace, if your job calls for insertion of pre-cut tab before each Document, or insertion of slip-sheet between each Document in job, you establish control here.

Document Precut Tab

Variable Text for Precut Tab
SmartPDFPrintware gives you choice to extract variable text for precut tab from multiple sources. You can extract variable text from file name of the document and print it on tab. You can also retrieve it from an external ‘TabText.txt’ file. This text file containing variable text for each tab can be created using an editor such as Notepad.

Job hot folder
You can insert Precut Tab before each document and print variable text on the tab.

**Step by Step Tutorial #P01-E: Insert Precut Tab**

1. **Objective:**
   a. Insert Precut Tab before each document.
2. **Prerequisites:**
   a. Study ‘Precut Tab’ under Job Building Objects
      » Media » Precut Tabs
   b. Complete either tutorial #P01-B or #P01-C
3. Select the **Doc Position** column header
4. Right Click the **Doc Position** column header
5. Select the **Select** menu item
6. Select the **Insert PreCut Tabs** menu item
7. window opens: Select Precut Tab
   a. Click the **V Select Media V** button
9. Select the **Size** menu item
10. Select the **Letter Tab 9" x 11"** menu item
11. Select the **Color** menu item
12. Select the **White** menu item
13. Select the **Type** menu item
14. Select the **Precut Tab** menu item
15. window opens: Media Type Precut Tab
16. Select number of precut tabs in sequence
   a. Example: 5
17. Click the Media Type Precut Tab window **OK** button
18. Click the Media window **OK** button
19. window opens: Precut Tab Variable Text
   a.
20. Select the **For Precut Tab, Use Variable Text** check box
21. Select the **Words** radio button
22. To set the word count, Click the **Up or down** button
   a. Example: 1
23. Click the Precut Tab window **OK** button
24. Save the setup.
25. Next Step:
   a. Continue or
   b. Print or start hot folder watcher.
Step by Step Tutorial #P01-F: Insert Slip Sheet

1. Objective:
   a. Insert Slip Sheet between documents

2. Prerequisites:
   a. Complete either tutorial #P01-B or #P01-C

3. Select the **Doc Position** column header

4. Right Click the **Doc Position** column header

5. Select the **Select** menu item

6. Select the **Separator Slip Sheet** menu item

7. **window opens: Select Separator Slip Sheet**

   a.

8. Click the **V Select Media V** button

9. Select the **Size** menu item

10. Select the **Letter (8.50" x 11")** menu item

11. Select the **Color** menu item

12. Select the **Yellow** menu item

13. Select the **Type** menu item

14. Select the **Plain Paper** menu item

15. Click the **OK** button

16. Save setup.

17. **Next Steps:**
   a. Depending on job, continue with tutorials or
   b. Print or start hot folder watcher.
Subsets

Create Subsets

Subset Media

Subset Sides

Subset Finishing

Next level in Position method job control hierarchy is dealing with subsets of a document. Here we will describe how to split a document into subsets. And for each subset, how to set media, sides and finishing – yes, ‘subset finishing’.

Step by Step Tutorial #P01-G: Subset Media, Subset Sides, Subset Finishing

1. Objectives:
   a. Split a document to Subsets
   b. Set Media for a specific Subset.
   c. Set Sides for a specific subset.
2. Prerequisites:
   a. Complete tutorial #P01-B or #P01-C
3. We want to create subsets of first document in list Universal 44-111-AB Silencer Manual.pdf
4. - - - - - Split Universal 44-111-AB Silencer Manual.pdf to subsets - - - - -
5. Navigate to Document Position and Name view #4
7. This will activate document position 1 in the Document Position Page Position and Size view #5
8. Navigate to Document Position Page Position and Size view #5
9. - - - - - set start of subset number One at Page Number 1 - - - - -
10. In view #5, double-click on the page position number 1

11. - - - - - set start of subset number Two at Page Number 13 - - - - -

12. Click the scroll bar to bring in view Page Number 13 of document number 1

13. Double-click on the page position number 13

14. - - - - - set start of subset number Three at Page Number 15 - - - - -

15. Double-click on the page position number 15

16. we have marked beginning page positions of three subsets of document in position one.

17. next we create subsets

18. - - - - - create Subset(s) : Subset(s) Button - - - - -

19. Click the Sub-Set(s) button

20. Select the All-Subsets menu item

21. Select the Select menu item

22. Select the Finishing menu item

23. window opens: For 'All-Subsets' select Finishing

24. Click the V Select Finishing V button

25. Select the Staple menu item

26. Select the One Staple menu item

27. Select the 1 Staple Top Left Portrait menu item
28. Click the OK button

29. Save setup.

30. **Split Dan FPG2 TP-2002-15 Manual.pdf to subsets**

31. To create subsets of Dan FPG2 TP-2002-15 we activate document #2.

32. Double-click the 2 item

33. This will activate document position 2 in the Document Position Page Position and Size view #5.

34. In Document Position Page Position and Size view #5 click the scroll bar up or down to bring in view document position 2.

35. Now for document number 2, we are going to mark beginning positions of each subset. We want to create three subsets:
   a. Subset 1: page 1 to 15 – set sides to one sided printing
   b. Subset 2: page 16 to 77
   c. Subset 3: page 78 to 136 – set finishing to three hole punch left portrait

36. Double-click page position 1

37. Click the scroll bar to bring in view page position 16

38. Double-click page position 16

39. Click the scroll bar to bring in view page position 78

40. Double-click page position 78

41. we have marked beginning page positions of three subsets of document in position two.
42. `- - - - - create Subset(s) : Subset(s) Button - -

43. Double-click the `Sub-Set(s)` button

44. Right Click the `Sub-Set(s)` button

45. ![Subset Selection Diagram]

46. Select the `1-15` menu item

47. Select the `Select` menu item

48. Select the `Simplex Duplex` menu item

49. Select the `One Sided` menu item

50. Select the `78-136` menu item

51. Select the `Select` menu item

52. Double-click the `Select` menu item

53. Select the `Finishing` menu item

54. Window opens: For '78-136' select Finishing

55. Click the `V Select Finishing V` button
56. Select the **Hole Punch** menu item

57. Select the **Three Holes** menu item

58. Select the **Left Portrait** menu item

59. Click the **OK** button

60. Save setup

61. Next Steps:
   a. Continue or
   b. Print or start hot folder watcher.

---

**Clear Subsets**

In Document Position Page Position and Size view #5, select beginning of subset marker – it is highlighted. Then click on “Clear” button. It will clear the beginning of subset. You must recreate subsets by click on the “Subset(s)” button.
Subset Separator Slip Sheet

Step by Step Tutorial P01-H: Subset Separator Slip Sheet

1. Objectives:
   a. Insert Slip Sheet between subsets

2. Prerequisites:
   a. Create Subsets
   b. Complete tutorial #P01-G

3. Click the Sub-Set(s) button

4. Select the All-Subsets menu item

5. Select the Select menu item

6. Select the Separator Slip Sheet menu item

7. window opens: Select Separator Slip Sheet

   a.
8. Click the V Select Media V button

9. Select the **Size** menu item

10. Select the Letter (8.50” x 11”) menu item

11. Select the **Color** menu item

12. Select the **Yellow** menu item

13. Select the **Type** menu item

14. Select the **Plain Paper** menu item

15. Click the **OK** button

16. Save setup.

17. Next steps:
   a. Continue with tutorial
   b. Print or start hot folder.

**Summary**
File Name

Whenever a PDF document is created, a unique file name is given to that document which ends with suffix dot PDF.

File names used in examples below contains lot of intelligence that can be used to conditionally control:

- **Grouping of Documents** so that all documents in an order will print together.
- **Printing Sequence** so that documents will print in correct sequence
  - Selection of a specific **Media**
  - Selection of **Sides**
  - Selection of a specific **Finishing** and more…

**Benefits of File Name method**

- No out of sequence printing
- No manual collation of mixed paper size and mixed paper stock documents
  - Conditional assembly of variable documents without manual intervention
- No Postscript, VIPP or any other type of programming
- Can be setup and run by minimum skill person

Please note that there are no restrictions on how you name the files. However, it would be beneficial to study following screen shots of well formed file names. It may help you compose your own file name schema.

Best way to explain benefit of SmartPDFPrintware File Name method is by way of actual examples. Following screen shots shows how each Field separated by Field Separation Character in the File Name is used to control print sequence, media selection, finishing selection, print quantity, and more.
Bulk Mailing

- Print this info on Document Banner Page
- Use numeric value to control Print Sequence
- Use numeric value to control Print Quantity

Group documents with same values

Select Media

Designate Underscore _ as Field Separation Character

Music Sales

- Group documents with same values
- Use numeric value to control Print Sequence

Use numeric value to control Print Quantity

Designate Space  ' '  as Field Separation Character
**Maintenance Manuals**

Select Media

Designate Underscore _ as Field Separation Character

Use numeric value to control Print Sequence

**Web Reports**

Select Media

Select Sides

Select Finishing

Designate Underscore _ as Field Separation Character

Use numeric value to control Print Sequence

Group documents with same values for printing
**Job Control Hierarchy**

**Job « Documents « Document**

Using File Name method, you can group large number of documents into Groups and within each Group; you can control order in which each document prints. You can set rules and parameters for conditional selection of media, sides, and finishing for each document in Group; and for each Group, insert slip-sheet between documents and between Groups, and insert banner page before each Document or before each Group. Using SmartPDFPrintware, you can easily achieve this by intelligent use of Fields in File Names of PDF documents.
Navigation within File Name method window

During explanation of various features and capabilities of File Name method, we will be referring to different views within File Name method window. Please familiarize with these views:

File Name method window is divided into seven sectional views. We will describe information presented by each view.

Hot Folders (1)
In Hot Folders view, you see listing of all hot folders that you added to SmartPDFPrintware.

FileName Setup (2)
FileName Setup view displays results of your setup, configuration activities. You can see relationship between a process control, conditional operator that uses parameter to affect resulting action. It displays in a tree view list of documents loaded in workspace.
Mixed Paper Sizes (3)
When job is loaded in workspace, SmartPDFPrintware traverses through all the documents. It calculates each page size and lists it. In this view, you can set one page size (e.g. 8.5 inch x 11 inch or 210 mm x 297 mm) to be associated with “Normal Media” object; and declare all other page sizes to be exception sizes and associate each exception size with corresponding “Exception Media” object.

File Name and Group (4)
If you wish to exert manual control over grouping of files and its print sequence you do it in this view. Here you can manually change print sequence of files in job by dragging and dropping it in to the desired position. You can also manually create Groups. This allows you to insert separator page between Groups, set same or different finishing (stapling, punching, folding etc) for each Group.

To browse a document, you can activate its display in Current Page View (#7) by double clicking on file name.

Field Separation Character (5)
Windows file system acceptable field separation characters are space, underscore and dash. Select the character in drop down list.

File Name Fields (6)
When PDF files are loaded into workspace, using Field Separation Character as delimiter, SmartPDFPrintware will parse and split each file name into Fields. It lists all files and separated fields in a grid view. In this view, you can leverage the power of SmartPDFPrintware to set conditional variable document production and assembly rules and parameters.
Current Page View (7)
When you double click on file name in File Name and Group view #4, it will open it and display a page in this view. You can scroll through the document by using left and right navigation buttons.

Status
Status displays files being processed.

Field Separation Character
When you are deciding on composition of the file name, please note that Windows file system acceptable field separation characters are space, underscore and dash. You can select only one character as Field Separation Character in view #5. You can use remaining characters in a field. Please study screen shot of Bulk Mail file names. Customer chose to use underscore character as field separator and dash character as a regular text character within some of the fields.

Fields
File name is composed of multiple fields – each field dedicated to control one conditional action. Intelligent use of Fields enables you to automate workflow unlike before. A study of sample File Name examples will help you device your own file naming schema. This is very useful in MIS applications that generate thousands of documents. As these documents are generated, the application system, using schema, can assign meaningful, well-formed file names.
Conditional Document Processing and Assembly

Once documents are loaded into File Name method workspace, in File Name Fields view #6, you can set Field-by-Field conditions to control variable production and assembly of it.

Note: Each Field can control only one action i.e. let us say if values in ‘Field02’ selects different paper stocks than you cannot use same field (Field02) to select different Finishing.

You can use values in Fields to

- **Group Documents** – print documents together in a job. When there are multiple documents from different customers in a job, this improves order integrity.
- **Control Print Sequence** – using numeric values in a control Field, print in correct sequence documents within a group, within a job.
- **Control Print Quantity** – using numeric values in a control Field, vary print quantity of each document in job.
- **Select Media** – switch paper stock, document by document
- **Select Sides** – switch simplex duplex printing, document by document.
- **Select Finishing** – switch document finishing, document by document.
Conditional Logic Operators

To enable automatic, conditional data-driven, variable production of documents, we have developed conditional operators specific to File Name method. Thorough understanding of these intuitive operators will help you derive maximum benefit of File Name method.

File Name Conditional Logical Operators are:

- ‘is-equal-to’ - this operator lets you set alphanumeric data-driven selection of Media, Sides, and Finishing.
- ‘is-any-other-value’ – this operator lets you set alphanumeric data-driven selection of media for mixed paper sizes.
- ‘use-numeric-value’ – this operator is used in two different controls (1) print sequence and (2) print quantity. Values in Field that controls print sequence will be numeric and values in Field that controls print quantity will be numeric.
- ‘use-same-values’ - this operator lets you keep all the files with same alphanumeric value in a control field together.
Associate Field with Conditional Process

Media Selection

When Field variable value ‘is-equal-to’ controlling parameter
Select specific Media referenced by controlling parameter

When Field variable value ‘is-any-other-value’
Select Media from Mixed Paper Sizes Lookup Table

Sides Selection

When Field variable value ‘is-equal-to’ controlling parameter
Select specific printing Side referenced by controlling parameter

Finishing Selection

When Field variable value ‘is-equal-to’ controlling parameter
Select specific Finishing referenced by controlling parameter

Group Documents in Job

‘use-same-values’ in Field to gather all documents into Groups

Printing Sequence

‘use-numeric-values’ in Field to print documents in correct sequence

We will explain each Conditional Operator in detail.
is-equal-to

Example:

‘PowerSystems’ file naming schema designated Field02 to control selection of Media objects for each document in the Job.

In example below, every time SmartPDFPrintware detects in Field02 value equal to ‘tab’, while generating XML job ticket, it will call out Media object set for parameter ‘tab’ during the setup.

When alphanumeric value of a controlling Field ‘is-equal-to’ parameter, select media/sides/finishing.

Example: When text value of Field02 is-equal-to “tab” select media – Letter Tab 9 x 11, White, Precut Tab, No Seq 5
In example below, every time SmartPDFPrintware detects in the Field02 value equal to ‘slip’, while generating XML job ticket, it will call out Media object set for parameter ‘slip’ during the setup.

Example: When text value of Field02 is-equal-to “slip” select media – 8.5 x11, Yellow, Plain Paper
is-any-other-value

In mixed page size job, when there are documents which contains many different sizes, for those documents, value in File Name Field that controls Media selection shall be different from all those values set during ‘is-equal-to’ Media object associations. In other words, all alphanumeric values used during establishment of associations using ‘is-equal-to’ between variable value and Media object become reserved values. When ‘is-any-other-value’ for Media selection Field is set, SmartPDFPrintware will first compare current variable value with ‘is-equal-to’ reserved value. If it does not find any match than use of ‘is-any-other-value’ instructs SmartPDFPrintware to select Normal Media and Exception Media using Mixed Page Size to Media object lookup table.

First associate mixed page sizes with Normal and Exception Media objects before using this control. SmartPDFPrintware will generate ‘page-override’ XML command for each range of exception page sizes.
Result of ‘is-equal-to’ and ‘is-any-other-value’ is shown below
**use-numeric-value**

You can use numeric string in the file name to control (1) print sequence and (2) set number of copies of a document.

**Use Numeric Value to control Print Sequence**

Example:

In ‘PowerSystems’, values in Field01 are numeric strings which are used to control print sequence all documents in the Job.
use-numeric-value

Field01
Use Numeric Value to control Print Quantity

Example:
In ‘Music Sales’, Field06 controls print quantity of each document in the Job.
**use-same-values**

Logical operator ‘UseSameValues’ enables you to gather all documents with same value in the controlling Field. This capability is needed when large number of documents from different orders are dropped in during say a 24 hour period for processing to start every day at say 3:00 pm. Documents belonging to one order should be processed together. UseSameValues logical operator enables you automatically sort all the orders in a job and schedule it for correct sequential processing.
When using ‘use-same-value’ you set grouping of documents, printing sequence control using numeric values will sort documents in a group for correct sequential printing. If you do not set document grouping control, then SmartPDFPrintware will sort all the documents in the Job and print those in sequence.

Examples:

In ‘BulkMail’, each order contains variable number of documents.
MusicSales

Groups of same values

Control print sequence in each Group

#1

#2
Print Quantity

‘use-numeric-values’ in Field to set print quantity

You can control variable number of copies of each document in the Job.
File Name Method Tutorials

We will use tutorial hot folders and sample documents in it to explain different features of File Name method.

<table>
<thead>
<tr>
<th>Tutorial</th>
<th>Hot Folder</th>
<th>Files</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>FN01</td>
<td>BulkMail</td>
<td>Bulkmail.zip</td>
<td></td>
</tr>
<tr>
<td>FN02</td>
<td>MusicSales</td>
<td>MusicSales.zip</td>
<td></td>
</tr>
<tr>
<td>FN03</td>
<td>PowerSystems</td>
<td>PowerSystems.zip</td>
<td></td>
</tr>
<tr>
<td>FN04</td>
<td>WebReports</td>
<td>WebReports.zip</td>
<td></td>
</tr>
</tbody>
</table>
Tutorial FN01 - BulkMail

Objectives

- Multiple orders in each job
- Ensure integrity of each order
- Documents for an order must print together
- Print in sequence documents within each order
- No manual collation or intervention

Tutorial Hot Folder: ‘BulkMail’
Tutorial Files: BulkMail.zip (unzipped)
Set Normal Page Size

Set Field Separation Character

Load PDF(s)

Before PDFs are loaded into workspace, we have to select default Media object for the Job and select a field separation character.

###

Step by Step Tutorial FN01: BulkMail

Step by Step Tutorial FN01-A: Set Default Page Size, Load PDF(s)

1. Objectives:
   a. Setup workspace for ‘BulkMail’ tutorial
   b. Set default page size. Load PDFs.

2. Prerequisites:

   a. Click desktop shortcut to start SmartPDFPrintware

3. Select Setup menu on Main Menu Bar.

4. SmartPDFPrintware window changes to Setup

5. Select the Setup menu item

6. Select the File Name tab

7. Navigate to File Name Setup view #2

8. Select the item Media, Finishing, Sides, Output - Default

9. window opens: Media, Finishing, Output - Default Job
10. Click the V Select Media V button
11. Select the Size menu item
12. Select the Letter (8.50" x 11") menu item
13. Select the Color menu item
14. Select the White menu item
15. Select the Type menu item
16. Select the Plain Paper menu item
17. Navigate to Two Sided Printing :: Simplex Duplex
18. Click the scroll bar up or down to bring in view Two Sided Duplex - Flip on Long
19. Select the Two Sided Duplex - Flip on Long Edge item
20. Click the OK button
21. The Media, Finishing, Output - Default Job window closes
22. Navigate to Hot Folders (#1) view
23. Select hot folder ‘BulkMail’
24. Right Click hot folder ‘BulkMail’
25. We are configuring ‘BulkMail’ folder for File Name automation method
26. Select the File Name menu item
27. - - - - - Select Field Separation Character - - - - -
28. Navigate to Field Separation Character view #5
29. To bring in view Field Separation Character for your job, click scroll bar up or down. 
   a. Example: Select the **Underscore '_'** item

30. - - - - - Load PDF(s) - - - - -

31. Click the **Load PDF(s)** button

32. SmartPDFPrintware will collect PDF files in hot folder. It will traverse through each Document and prepare list of different, unique page sizes. It will list different page sizes it finds in the Mixed Paper Sizes view #3. Using Field Separation Character as delimiter, it will parse and split each file name into Fields and populate File Name Fields view #6.

33. Next Steps:
   a. Set ‘Job Attributes’ – please refer to tutorial JA01
   b. Set ‘Automation’
   c. Continue on to tutorial #FN0X

    ###
BulkMail – before view – File Name method

Field01 controls
Group Documents

Field02 controls
Media selection

Field04 controls
Print Sequence
Action controlled by Field

<table>
<thead>
<tr>
<th>Action</th>
<th>Field01</th>
<th>Field02</th>
<th>Field03</th>
<th>Field04</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Sequence</td>
<td>N</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Media</td>
<td>AN</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Sides</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finishing</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Quantity</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Control Fields

Field    | Action
----------|-----------------------
Field01   | controls Grouping of Documents in job
Field02   | controls Media selection for a document in job
Field04   | controls Printing Sequence of documents in each Group

Grouping of Documents in Job using values in Field01

In a job, when there are many of documents from different customers, you may want to group documents for each customer and print these documents together. To gather all documents for a customer, we want to separate documents in to groups – one group for each customer. Documents are grouped together when value in Document’s File Name Field01 is same alphanumeric text string.

Print Sequence control using values in Field04

When there are many documents going to one customer, it may be desirable to print these documents in certain specific sequence. You can use numeric string to print documents in ascending order. Tutorial job designates ‘Field04’ to control print sequence within a group.
Variable Media Selection using values in Field02

Field02 contains two distinct alphanumeric strings – ‘XRX025’ and ‘XRX049’.

We want to associate selection of

- 8.5” x 11”, Blue, Plain Paper when in Field02 of File Name of a
document is equal to ‘XRX025’ and
- 8.5” x 11”, Red, Plain Paper when in Field02 of File Name of a
document is equal to ‘XRX049’

Group Finishing and Group Separator Page

Once Field01 is set to control grouping of files in a job, you can setup
Group Finishing to Staple all documents in-group and or add Separator
Page between Groups.

###

Step by Step Tutorial FN01-B: Group Documents, Print Sequence,
Conditional Media Selection

1. Objectives:
   a. Using variable values in Fields, control
      Grouping of documents, print sequence and
      select Media
2. Prerequisites:
   a. Complete tutorial FN01-A
3. - - - - - set Field01 control : Group Documents - - - -
4. We are going to associate selection of Media with
   alphanumeric values in Field02
5. Left Click the **Field01** column header
6. Right Click the **Field01** column header

   Field01

7. Select the 'use-same-values' in Field01 to menu item
   'use-same-values' in Field01 to
8. Select the **Group for Printing** menu item
9. - - - - - set Field04 control : Printing Sequence - - - - -

10. Left click the **Field04** column header

11. Right Click the **Field04** column header

12. Select the 'use-numeric-value' in Field04 menu item

13. Select the **To Control** menu item

14. Select the **PrintSequence** menu item

15. Select the Print in Ascending Order menu item

16. - - - - - set Field02 control : select Media - - - - -

17. We are going to associate selection of Media with alphanumeric values in Field02

18. We are going to repeat the process of associating Media with each unique value under column header ‘Field02’.

19. When you study different values under ‘Field02’, you notice that there are two parameters ‘XRX025’ and ‘XRX049’. We want to set Media selection for both parameters.

20. - - - - - for parameter XRX025 : set Media selection - - - - -

21. We are going to build Conditional Media Selection statement:

   a. When value in a document’s File Name ‘Field02’ is equal to ‘XRX025’, for that document select Media with attributes:
      i. Page Size: 8.5” x 11”
      ii. Color: Blue
      iii. Type: Plain Paper

22. let us continue with setup

23. Left Click the XRX025 item

24. Right Click the **XRX025** item
25. Select the when text value of Field02 'is-equal-to' XRX025
26. Select the Select menu item
27. Select the Media menu item
28. window opens: when text value of Field02 'is-equal-to' XRX025 select Media
29. Click the V Select Media V button
30. Select the Size menu item
31. Select the Letter (8.50" x 11") menu item
32. Select the Color menu item
33. Select the Blue menu item
34. Select the Type menu item
35. Select the Plain Paper menu item
36. Click the OK button
37. - - - - - for parameter XRX049 : set Media selection - - - - -
38. We are going to build Conditional Media Selection statement:
   a. When value in a document’s File Name ‘Field02’ is equal to ‘XRX049’, for that document select Media with attributes:
      i. Page Size: 8.5" x 11"
      ii. Color: Red
      iii. Type: Plain Paper
39. Left Click the XRX049 item
40. Right Click the XRX049 item
41. Select the when text value of Field02 'is-equal-to' XRX049 menu item
42. Select the Select menu item
43. Select the Media menu item
44. window opens: when text value of Field02 'is-equal-to' XRX049 select Media
45. Click the V Select Media V button

46. Select the Size menu item

47. Select the Letter (8.50" x 11") menu item

48. Select the Color menu item

49. Select the Red menu item

50. Select the Type menu item

51. Select the Plain Paper menu item

52. Click the OK button

53. Save setup. Click Save button

54. Next Steps:
   a. Print or start hot folder or
   b. Continue with additional processing setup
   c. Continue to tutorial #FN0X and or #FN0X

###

**Group Finishing**

In tutorial #FN02, to separate documents in to groups, we designated File Name ‘Field01’. This enables creation of groups each of which may contain variable number of documents. You can elect to do Group Finishing – group by group. Please remember it is your responsibility to ascertain whether your finishing system can handle the job without faulting out.

###

**Step by Step Tutorial FN01-C: Group Finishing**

1. Objectives:
   a. Apply two staples left portrait to documents in each group created by ‘Field01’

2. Prerequisites:

3. Complete tutorial #FN02

4. - - - - - set GroupFinishing control : select Staple - - - - -

5. We are going to set condition
a. For each group created by control ‘Field01’, staple documents in the group.

6. Go to File Name setup view #2
7. Navigate to node Fields
8. Navigate to node Field01
9. Navigate to node UseSameValues
10. Navigate to node Group Documents
11. Select the Group Documents item
12. Right Click the item Group Documents
13. Select the Group Finishing menu item

a. 
15. Click the V Select Finishing V button
16. Select the Staple menu item
17. Select the Two Staples menu item
18. Select the 2 Staples Left Portrait menu item
19. Click the OK button
20. Save setup. Click Save button
21. Next Steps:
   a. Print or start hot folder
22. continue to next tutorial

###

Group Separator Slip Sheet
In tutorial #FN02, to separate documents into groups, we designated FileName ‘Field01’. This enables creation of groups each of which may contain variable number of documents in each group. To facilitate easy separation of print orders, it is desirable to insert bright colored slip sheets between group of documents.

###

**Step by Step Tutorial FN01-D: Group Separator Slip Sheet**

1. Objectives:
   a. Insert slip sheet between each group created by control ‘Field01’
2. Prerequisites:
   a. complete tutorial #FN02
3. 
   set Group Separator Slip Sheet : select Media
4. We are going to set condition
   a. Between each group created by control ‘Field01’, insert Media object ‘Separator Slip Sheet’ with attributes:
      i. Page Size: 8.5 “ x 11”
      ii. Color: Yellow
      iii. Type: Plain Paper
5. Go to File Name setup view #2
6. Navigate to node **Fields**
7. Navigate to node **Field01**
8. Navigate to node **UseSameValues**
9. Navigate to node **Group Documents**
10. Select the item **Group Documents**
11. Right Click the item **Group Documents**
12. Select the Group Separator Slip Sheet menu item **Group Documents**
13. window opens: Select Group Separator Slip Sheet
a. 

14. Click the V Select Media V button

15. Select the Size menu item

16. Select the Letter (8.50" x 11") menu item

17. Select the Color menu item

18. Select the Yellow menu item

19. Select the Type menu item

20. Select the Plain Paper menu item

21. Click the OK button

22. Save setup. Click Save button

23. Next Steps:
   a. Print or start hot folder
   b. continue to next tutorial

###
Group Banner Page
In tutorial #FN02, to separate documents into groups, we designated File Name ‘Field01’. This enables creation of groups each of which may contain variable number of documents in each group. To facilitate easy separation of print orders, it is desirable to insert bright colored slip-sheets between groups of documents.

###

Step by Step Tutorial FN01-E: Group Banner Page

1. Objectives:
   a. Print Banner Page before each Group
   b. Banner Page Media object attributes:
      i. Page Size: 8.5" x 11"
      ii. Color: Green
      iii. Type: Plain Paper

2. Prerequisites:
   a. Complete tutorial #FN02

3. set Group Banner Page: select Media

4. Select the item

5. Right Click the item

6. Select the Group Banner Page menu item

7. window opens:

8. Click the V Select Media V button

9. Select the Size menu item

10. Select the Letter (8.50" x 11") menu item

11. Select the Color menu item
12. Select the **Green** menu item  
13. Select the **Type** menu item  
14. Select the **Plain Paper** menu item  
15. Click the **OK** button  
16. Group Banner Page window closes  
17. Save setup. Click **Save** button  
18.  
19. **Next Steps:**  
20. Print or start hot folder  
   a. To print immediately  
      i. On FreeFlow Print Controller (DocuSP), Program Paper Trays  
      ii. Click the **Print** button  
      iii. window opens: Print and Finish - SmartPDFPrintware™ B2BeDocuments™  
   b. Or start hot folder  
      i. Click the **Print** button  
      ii. Once job is printed, close window  
      iii. Or start hot folder  
      iv. Click the **Print** button  
      v. Once job is printed, close window
BulkMail – after view – File Name method

- - - - end of tutorial FN01
Tutorial FN02 - MusicSales

The Job
- Very high resolution, very large files

Objectives
- Rip only once – print multiple copies
- Multiple orders within a job
- Ensure order integrity
- Print in sequence requested by customer
- Separator between copies
- Separator between orders

Objectives
- Generate End of set signal for C.P. Bourg booklet maker.
- Reprint multiple copies without re-RIPing by first saving documents in fast reprint raster format (*.frf).
- Apply front and back cover to each order.

Tutorial Hot Folder: ‘MusicSales’
Tutorial Files: MusicSales.zip
###

Step by Step Tutorial FN02: MusicSales

Step by Step Tutorial FN02-A: Select Field Separation Character, Load PDF(s)

1. Objectives:
   a. Select Field Separation Character, Load PDFs
2. Prerequisites:
   a. Start SmartPDFPrintware
   b. Click Setup Switch to File Name method tab
   c. » Navigate to Hot Folder view (1)
   d. » Select Hot Folder
   e. » Right click Hot Folder
   f. » Select File Name Method
3. Navigate to Field Separation Character view #5
4. Select the *Space* *' '* character from drop down list
5. Navigate to Hot Folders (#1) view
6. Select hot folder `MusicSales`
7. Right Click hot folder `MusicSales`
8. Select the File Name menu item
9. Click the Load PDF(s) button `LoadPDF(s)` near top of window.
10. SmartPDFPrintware will load documents in workspace.

###
MusicSales – before view – File Name method

Action controlled by Field

<table>
<thead>
<tr>
<th>Action</th>
<th>Field01</th>
<th>Field02</th>
<th>Field03</th>
<th>Field04</th>
<th>Field05</th>
<th>Field06</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>AN</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Sequence</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Media</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sides</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finishing</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Quantity</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Control Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field01</td>
<td>controls Grouping of Documents</td>
</tr>
<tr>
<td>Field04</td>
<td>controls Print Sequence of documents in each Group</td>
</tr>
<tr>
<td>Field06</td>
<td>controls Print Quantity</td>
</tr>
</tbody>
</table>

###

Step-by-Step tutorial FN02-B: Group Documents, Print Sequence, Print Quantity

1. Objectives:
   a. Use Fields to control Grouping of documents, print sequence, print quantity
2. Prerequisites:
   a. Complete tutorial FN02-A
3. set Field01 control : Group Documents - - - - -
4. Navigate to File Name Fields view #6
5. Click scroll bars left or right to bring in view column Field01
6. We are going to set condition
   a. Separate documents with same value in Field01 in to Groups
7. Left Click Field01 column header
8. Right Click Field01 column header
9. A windows popup opens
10. Select 'use-same-values' in Field01 to menu item 'use-same-values' in Field01 to
11. Select the Group for Printing menu item
12. A windows popup closes
13. set Field04 control : Printing Sequence - - - - -
14. We are going to set condition
   a. Use numeric values in Field04 to control Print Sequence of within each Group.
15. Click scroll bars left or right to bring in view column Field04
16. Left Click Field04 column header
17. Right Click Field04 column header
18. A windows popup opens
19. Select 'use-numeric-value' in Field04 menu item
20. Select To Control menu item
21. Select the PrintSequence menu item
22. Select the Print in Ascending Order menu item
23. A windows popup closes
24. - - - - - set Field06 control : Print Quantity - - - - -
25. We are going to set condition
   a. Use print quantity in Field06 to set print quantity for each document.
26. Click scroll bars left or right to bring in view column Field04
27. Left Click the Field06 column header
28. Right Click the Field06 column header
29. A windows popup opens
30. Select the 'use-numeric-value' in Field06 menu item
31. Select the To Control menu item
32. Select the PrintQuantity menu item
33. - - - - - set Cover control : select Media - - - - -
34. Go to File Name setup view #2
35. Locate Document(s) node
36. Select the item
37. Select the Covers menu item
38. window opens: Covers Selection -
   SmartPDFPrintware™ B2BeDocuments™
39. In Cover Options drop down list
40. Select the Front and Back: Different item
41. - - - - - set Front Cover Media - - - - -
42. In Front Cover Media
43. Click the V  Select Media  V button
44. Select the Size menu item
45. Select the Letter (8.50” x 11”) menu item
46. Select the Color menu item
47. Select the Ivory menu item
48. Select the Type menu item
49. Select the Plain Paper menu item
50. - - - - - Front Cover Printing Option - - - - -
51. Select the Pre-Printed item
52. - - - - - set Back Cover Media - - - - -
53. Click the V  Select Media  V button
54. Select the Size menu item
55. Select the Letter (8.50” x 11”) menu item
56. Select the Color menu item
57. Select the White menu item
58. Select the Type menu item
59. Select the Plain Paper menu item
60. - - - - - Back Cover Printing Option - - - - -
61. Select the Blank item
63. Click the **OK** button
64. Save
65. **- - - - - Document Separator Slip Sheet : select** Media **- - - - -**
66. Select the item [Document(s)]
67. Right Click the item [Document(s)]
68. Select the Separator Slip Sheet menu item
69. **window opens: Select Separator Slip Sheet**

70. Click the V Select Media V button
71. Select the **Size** menu item
72. Select the Letter (8.50" x 11") menu item
73. Select the **Color** menu item
74. Select the **Yellow** menu item
75. Select the **Type** menu item
76. Select the **Plain Paper** menu item
77. Click the **OK** button
78. Next Steps:
79. Print or start hot folder

###
MusicSales – after view #1 – File Name method

<table>
<thead>
<tr>
<th>Field01</th>
<th>Seq01</th>
<th>Field02</th>
<th>Seq02</th>
<th>Field03</th>
<th>Seq03</th>
<th>Field04</th>
<th>Seq04</th>
<th>Field05</th>
<th>Seq05</th>
<th>Field06</th>
<th>Seq06</th>
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<tbody>
<tr>
<td>392245</td>
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<td></td>
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<td></td>
<td>392245</td>
<td></td>
</tr>
<tr>
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<td>Duchansky</td>
<td>Cruz-Crest</td>
<td>Duchansky</td>
<td>Cruz-Crest</td>
<td>Duchansky</td>
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<td></td>
</tr>
</tbody>
</table>

For more details, please refer to the SmartPDFPrintware User Guide.
MusicSales – after view #2 – File Name method
Tutorial FN03 – Power Systems

Maintenance Manuals

Structure of Job
A set of PDF files, one for each chapter in the maintenance manual were created by scanning pages of various equipment’s paper maintenance manuals. Handwritten inspection reports were also scanned to PDFs. Mixed page sizes in each chapter varied widely. No two manual sets were alike i.e. by regulatory requirement, each set of manuals were specific to each power plant. A typical set of manuals would consist of 3,000 to 5,000 pages. There may be large number of exception pages spread randomly throughout the set. It was taking weeks to mark manually each exception page in the job.

Business Need
Reduce time it took to setup the job. Eliminate manual collation of mixed page size job.
Alternatives

Customer could have developed custom, one off software solution.

Solution

SmartPDFPrintware File Name automation method. When job is loaded in the setup workspace, it automatically creates a list of Normal and Exception page sizes. This helps you quickly associate appropriate stock (Media object) with physical page size.

Advantage

Turnaround time was reduced from weeks to about ten minutes.

Benefit

Each chapter of the manual prints in correct sequence as SmartPDFPrintware is able to leverage File Name Field to control printing sequence; and dynamically generate page override commands for each exception page size.

The Job

- Maintenance manuals – each set thousands of pages.
- Each chapter consists of mix page sizes.
- Large number of wide variety of page sizes spread throughout each manual.

Objectives

- Print in sequence requested by customer
- Automatically switch different page sizes
- Separator between chapters
- Precut Tab before each chapter
- Use chapter name as variable text for Precut Tab.
Step by Step Tutorial FN03: PowerSystems

Step by Step Tutorial FN03-A: Mixed Paper Sizes, Print Sequence

1. Objectives:
   a. Default Page Size, Load PDFs

2. Prerequisites:
   a. Switch to File Name method tab
   b. » Navigate to Hot Folder setup view #2
   c. » Locate Media, Finishing, Output node
   d. »

3. - - - - - - set Job default Media - - - - -

4. Select the item Media, Finishing, Sides, Output : Default

5. window opens: Media, Finishing, Output - Default Job
6. Click the V Select Media V button
7. Select the Size menu item
8. Select the Letter (8.50" x 11") menu item
9. Select the Color menu item
10. Select the White menu item
11. Select the Type menu item
12. Select the Plain Paper menu item
13. Click the scroll bar of Two Sided Printing
14. Select the Two Sided Duplex - Flip on Long Edge item
15. Click the OK button
16. - - - - - select Hot Folder: PowerSystem - - - - -
17. Go to Hot Folders view #1
18. Select the item PowerSystem
19. Right Click the item PowerSystems
20. Select the File Name menu item
21. - - - - - Do you want to use Previous Setup? - - - - -
22. The Caution dialog opens
23. Click the No button
24. - - - - - select Field Separation Character - - - - -
25. Go to Field Separator view #5
26. In list view, click the scroll bar
27. Select the character
28. example: Select the **Underscore '_'** item

```
Underscore '
```

29. **Load PDF(s)**

30. Click the **Load PDF(s)** button

31. Save

32. Next Steps:
   a. Continue with tutorial FN03-B

---

**PowerSystem – before view – File Name method**

---

[Image of SmartPDFPrintware Enterprise interface]

- **Print Sequence**
- **Media**
- **Mixed Page Sizes**
- **Chapter Mixed Page Sizes**
Action Controlled by Field

<table>
<thead>
<tr>
<th>Action</th>
<th>Field01</th>
<th>Field02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group AN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Sequence</td>
<td>N</td>
<td>X</td>
</tr>
<tr>
<td>Media AN</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Sides AN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finishing AN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Quantity</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

Control Fields

Field          Action
Field01 controls Print Sequence of documents
Field02 controls Media selection

When we combine above information with customer supplied job information (paper stock, finishing etc), we come up with following:

Page Size to Media Association
Associate each page size to a specific Media object.

Conditional Media selection statement

- If a document File Name Field02 alphanumeric value is equal to ‘Slip’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: Yellow
  - Type: Plain Paper

- If a document File Name Field02 alphanumeric value is equal to ‘Tab’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: White
  - Type: Precut Tab, No of Sequences 5
● If a document File Name Field02 alphanumeric value is any other value than look up Media object attribute from ‘Mixed Page Size’ Table.

###

Step by Step Tutorial FN03-B: Conditional Media selection, Side selection, Finishing selection

1. Objectives:
   a. Set conditional selection of Media objects
2. Prerequisites:
   a. Complete tutorial FN03-A
3. set Page Size to Media object associations
4. Navigate to Mixed Page Sizes view (3)
5. set normal Page Size to Normal Media
6. Note: PDFs were created by scanning in pages. Odd page sizes are results of scanning operations.
7. To select multiple page sizes, press Ctrl key down
8. Select the item
   8.500 11.000
9. Select the item
   8.500 10.986
10. Select the item
    8.264 11.694
11. Select the item
    8.639 10.972
12. Select the item
    8.500 11.014
13. Select the item
    8.500 11.056
14. Select the item
    8.514 11.014
15. Select the item
    8.528 10.986
16. Select the item
    8.444 10.944
17. Select the item
   ![Image 217x689 to 629x703]

18. Release Ctrl key if it was pressed down.
19. All selected items will be highlighted.
20. Right Click the last item

21. Select the **Normal Media** menu item
   ![Image 217x624 to 303x606]

22. Select the **Select Media** menu item
   ![Image 217x592 to 312x606]

23. Window opens: select Normal Media
   ![Image 252x426 to 427x542]

   a. Click the V Select Media V button
      ![Image 217x394 to 312x409]

24. Select the **Size** menu item
25. Select the Letter (8.50" x 11") menu item
   ![Image 420x378 to 498x392]

26. Select the **Color** menu item
27. Select the **White** menu item
28. Select the **Type** menu item
29. Select the **Plain Paper** menu item
30. Select the **Two Sided Duplex - Flip on Long Edge** item

31. Click the **OK** button
32. Set Exception Page Size to Exception Media
33. Repeat the process for each exception page size
34. Select the item
   ![Image 429x327 to 507x341]

   ![Image 430x307 to 515x322]

   ![Image 425x288 to 503x302]

   ![Image 217x253 to 298x267]

   ![Image 288x220 to 471x235]

   ![Image 378x201 to 413x216]
36. Select the item

37. Select the item

38. Right Click the item

39. Select the **Exception Media** menu item

40. Select the **Select Media** menu item

41. window opens: select Exception Media

```
<table>
<thead>
<tr>
<th>Mixed Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>V Select Media V</td>
</tr>
</tbody>
</table>
```

42. Click the V Select Media V button

43. Select the **Size** menu item

44. Select the **Tabloid (11" x 17")** menu item

45. Select the **Color** menu item

46. Select the **White** menu item

47. Select the **Type** menu item

48. Select the **Plain Paper** menu item

49. Select the One Sided Simplex item

```
| One Sided Simplex |
```

50. Click the **OK** button

51. - - - - - repeat above process for each exception page size - - - - -

52. Save setup

53. Navigate to File Name Fields view #6

54. - - - - - set Field02 control : select Media - - - - -
55. - - - - - set Media object for parameter 'tab' - - - - -
56. Select the tab item
57. Right Click the tab item
58. Select the when text value of Field02 'is-equal-to' tab menu item
59. Select the Select menu item
60. Select the Media menu item
61. window opens: when text value of Field02 'is-equal-to' tab select Media
62. Click the V Select Media V button
63. Select the Size menu item
64. Select the Letter Tab 9" x 11" menu item
65. Select the Color menu item
66. Select the White menu item
67. Select the Type menu item
68. Select the Precut Tab menu item
69. window opens: Media Type Precut Tab
70. Select number of precut tabs in sequence example: 5
71. Click the Media Type Precut Tab window OK button
72. Click the Media window OK button
73. - - - - - set Media object for parameter 'slip' - - - - -
74. Select the **slip** item

75. Right Click the **slip** item

76. Select the when text value of Field02 'is-equal-to' slip menu item

77. Select the when text value of Field02 'is-equal-to' slip menu item

78. Select the **Select** menu item

79. Select the **Media** menu item

80. window opens: when text value of Field02 'is-equal-to' slip select Media

![Image of Media selection window]

81. Click the V **Select Media** V button

82. Select the **Size** menu item

83. Select the Letter (8.50" x 11") menu item

84. Select the **Color** menu item

85. Select the **Yellow** menu item

86. Select the **Type** menu item

87. Select the **Plain Paper** menu item

88. Click the Media window **OK** button

89. for documents with Mixed Page Sizes, point to Normal, and Exception Media lookup table -

90. Select the **Field02** column header

91. Right Click the **Field02** column header
92. Select the when text value of Field02 'is-any-other-value' menu item

93. Select the Select menu item

94. Select the Mixed Media by PDF Page Size menu item

95. Click the OK button

96. set Field01 control : Printing Sequence

97. Select the Field01 column header

98. Right Click the Field01 column header

99. Select the 'use-numeric-value' in Field01 menu item

100. Select the To Control menu item

101. Select the PrintSequence menu item

102. Select the Print in Ascending Order menu item

103. Save setup

104. Next Steps

   a. Print or start hot folders
   b. To print, program paper trays

###
PowerSystem – after view – File Name method
Tutorial FN04 – Web Reports

Objectives

- Multiple orders in each job
- Ensure integrity of each order
- Documents for an order must print together
- Print in sequence documents within each order
- No manual collation or intervention

Tutorial Hot Folder: ‘WebReports’
Tutorial Files: WebReports.zip (unzipped)

WebReports Hot Folder
Step by Step Tutorial FN04: WebReports

Step by Step Tutorial FN04-A: Job Default Media, Load PDFs

1. Objectives:
   a. Set job default Media object, Load PDFs in to workspace
2. Prerequisites:
   a. Start SmartPDFPrintware
3. Select the Setup menu item
4. Select the File Name tab
5. - - - - - set Job default Media - - - - -
6. Select the item Media, Finishing, Sides, Output - Default Job
7. window opens: Media, Finishing, Output - Default Job
8. Click the V Select Media V button
9. Select the Size menu item
10. Select the Letter (8.50" x 11") menu item
11. Select the Color menu item
12. Select the White menu item
13. Select the Type menu item
14. Select the Plain Paper menu item
15. Click the scroll bar of Two Sided Printing
16. Click the scroll bar
17. Select the Two Sided Duplex - Flip on Long Edge item
18. Click the **OK** button

19. select Hot Folder example:

   WebReports

20. Navigate to Hot Folders view #1

21. Select the item

22. Right Click the item

23. Select the **File Name** menu item

24. select Field Separation Character

25. Navigate to Field Separator view #5

26. In list view, Click the scroll bar

27. Select the character

28. example: Select the **Underscore** ' _ ' item

29. Load PDF(s)

30. Click the **Load PDF(s)** button

31. Save setup

32. Next steps:

   a. Continue to tutorial FN04-B

###
### WebReports – before view – File Name method

![WebReports Interface](image)

### Action controlled by Field

<table>
<thead>
<tr>
<th>Action</th>
<th>Field01</th>
<th>Field02</th>
<th>Field03</th>
<th>Field04</th>
<th>Field05</th>
<th>Field06</th>
<th>Field07</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>AN</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Print Sequence</td>
<td>N</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
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<tr>
<td>Finishing</td>
<td>AN</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Print Quantity</td>
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<td></td>
</tr>
</tbody>
</table>
Control Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field02</td>
<td>controls Grouping of Documents in job</td>
</tr>
<tr>
<td>Field03</td>
<td>controls Print Sequence within a Group</td>
</tr>
<tr>
<td>Field04</td>
<td>controls Media selection</td>
</tr>
<tr>
<td>Field05</td>
<td>controls Sides selection</td>
</tr>
<tr>
<td>Field06</td>
<td>controls Finishing selection</td>
</tr>
</tbody>
</table>

When we combine above information with customer supplied job information (paper stock, finishing etc), we come up with following:

Conditional Media selection statement

- If a document File Name Field04 alphanumeric value is equal to ‘100PL’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: White
  - Type: Plain Paper
- If a document File Name Field04 alphanumeric value is equal to ‘401LH’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: White
  - Type: Custom, ‘401KLetterHead’
- If a document File Name Field04 alphanumeric value is equal to ‘418LBL’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: White
  - Type: Labels
- If a document File Name Field04 alphanumeric value is equal to ‘3X5’, select Media object with attribute:
  - Page Size: 8.5” x 11”
  - Color: White
  - Type: Custom, ‘3x5Card’

Conditional Sides selection statement

- If a document File Name Field05 alphanumeric value is equal to ‘sim’, select Sides object with attribute ‘One Sided’ printing
- If a document File Name Field05 alphanumeric value is equal to ‘dupLonE’, select Sides object with attribute ‘Two Sided Long Edge’
● If a document File Name Field05 alphanumeric value is equal to 'dupShortE', select Sides object with attribute 'Two Sided Long Edge'

Conditional Finishing selection statement
● If a document File Name Field06 alphanumeric value is equal to 'sstl', select Finishing object with attribute:
   Staple: One Top Left
● If a document File Name Field06 alphanumeric value is equal to 'tslp', select Finishing object with attribute:
   Staple: 2 Staples Left Portrait

###

Step by Step Tutorial FN04-B: Group Documents, Print Sequence, Conditional Media, sides, Finishing Selection

1. Objectives:
   a. Set Group, Print Sequence, conditional Media, Sides, Finishing selection.
2. Prerequisites:
   a. Complete tutorial FN04-A
3. - - - - - set Field01 control : Group Documents for Printing - - - - -
4. Left Click the Field02 column header
5. Right Click the Field02 column header
6. Select the 'use-same-values' in Field02 to menu item
7. Select the Group for Printing menu item
8. Save setup
9. - - - - - set Field03 control : Printing Sequence - - - - -
10. Left Click the Field03 column header
11. Right Click the Field03 column header
12. Select the 'use-numeric-value' in Field03 menu item
13. Select the To Control menu item
14. Select the **PrintSequence** menu item

15. Select the Print in Ascending Order menu item

16. Save setup.

17. - - - - set Field04 control : select Media - - - -

18. - - - - set Media object for parameter ‘100PL’

19. Left Click the **100PL** item

20. Right Click the **100PL** item

21. Select the when text value of Field04 'is-equal-to' 100PL menu item

22. Select the **Select** menu item

23. Select the **Media** menu item

24. window opens: when text value of Field04 'is-equal-to' 100PL select Media

25. Click the V Select Media V button

26. Select the **Size** menu item

27. Select the Letter (8.50" x 11") menu item

28. Select the **Color** menu item

29. Select the **White** menu item

30. Select the **Type** menu item

31. Select the **Plain Paper** menu item

32. Click the Media window **OK** button

33. - - - - set Media object for parameter ‘401LH’

34. Left Click the **401LH** item

35. Right Click the **401LH** item
36. Select the when text value of Field04 'is-equal-to' 401LH menu item

37. Select the Select menu item

38. Select the Media menu item

39. window opens: when text value of Field04 'is-equal-to' 401LH select Media

40. Click the V Select Media V button

41. Select the Size menu item

42. Select the Letter (8.50" x 11") menu item

43. Select the Color menu item

44. Select the White menu item

45. Select the Type menu item

46. Select the Custom menu item

47. window opens: Custom Media Type :: B2BeDocuments™

48. Select the Media Type text box

49. Enter name of Custom media in the text box. Example: 401KLetterHead

50. Click the Apply button

51. Click the Custom Media OK button

52. Click the Media window OK button

53. - - - - - set Media object for parameter '418LBL' - - - - -

54. Left Click the 418LBL item

55. Right Click the 418LBL item

56. Select the when text value of Field04 'is-equal-to' 418LBL menu item

57. Select the Select menu item

58. Select the Media menu item
59. window opens: when text value of Field04 'is-equal-to' 418LBL select Media

60. Click the V Select Media V button

61. Select the Size menu item

62. Select the Letter (8.50" x 11") menu item

63. Select the Color menu item

64. Select the White menu item

65. Select the Type menu item

66. Select the Labels menu item

67. Click the Media window OK button

68. --- set Media object for parameter ‘3x5’ ---

69. Select the 3x5 item

70. Right Click the 3x5 item

71. Select the when text value of Field04 'is-equal-to' 3X5 menu item

72. Select the Select menu item

73. Select the Media menu item

74. window opens: when text value of Field04 'is-equal-to' 3X5 select Media

75. Click the V Select Media V button

76. Select the Size menu item

77. Select the Letter (8.50" x 11") menu item

78. Select the Color menu item

79. Select the White menu item

80. Select the Type menu item

81. Select the Custom menu item

82. window opens: Custom Media Type :: B2BeDocuments™
83. Select the **Media Type** text box

84. Enter name of Custom media in the text box.
Example: 3x5Card

85. Click the **Apply** button

86. Click the Custom Media window **OK** button

87. Click the Media window **OK** button

88. - - - - - set Field05 control: select Sides - - - - -

89. - - - - - set Sides object for parameter ‘sim’ - - - - -

90. Select the **sim** item

91. Right Click the **sim** item

92. Select the when text value of Field05 'is-equal-to' sim menu item

93. Select the **Select** menu item

94. Select the **Simplex Duplex** menu item

95. Select the **One Sided** menu item

96. - - - - - set Sides object for parameter ‘dupLongE’ - - - - -

97. Left Click the **dupLongE** item

98. Right Click the **dupLongE** item

99. Select the when text value of Field05 'is-equal-to' dupLongE menu item

100. Select the **Select** menu item

101. Select the **Simplex Duplex** menu item

102. Select the **Two Sided Long Edge** menu item

103. - - - - - set Sides object for parameter ‘dupShortE’ - - - - -
104. Left Click the `dupShortE` item

105. Right Click the `dupShortE` item

106. Select the when text value of Field05 'is-equal-to' dupShortE menu item

107. Select the `Select` menu item

108. Select the `Simplex Duplex` menu item

109. Select the Two Sided Short Edge menu item

110. - - - - set Field06 control : select Finishing - - - -

111. - - - - set Finishing - Staples object for parameter 'sstl' - - - -

112. Left Click the `sstl` item

113. Right Click the `sstl` item

114. Select the when text value of Field06 'is-equal-to' sstl menu item

115. Select the `Select` menu item

116. Select the `Finishing` menu item

117. window opens: Finishing Selection - B2BeDocuments™ SmartPDFPrintware™

118. Click the V Select Finishing V button

119. Select the `Staple` menu item

120. Select the `One Staple` menu item
121. Select the 1 Staple Top Left Portrait menu item
122. Click the Finishing window OK button
123. - - - - - set Finishing - Staples object for parameter ‘tslp’ - - - - -
124. Left Click the tslp item
125. Right Click the tslp item
126. Select the when text value of Field06 'is-equal-to' tslp menu item
127. Select the Select menu item
128. Select the Finishing menu item
129. window opens: Finishing Selection - B2BeDocuments™ SmartPDFPrintware™
130. Click the V Select Finishing V button
131. Select the Staple menu item
132. Select the Two Staples menu item
133. Select the 2 Staples Left Portrait menu item
134. Click the Finishing window OK button
135. Save setup
136. Next Steps:
   a. Print or start hot folder

###
WebReports – after view #1 - File Name method
WebReports – after view #2 - File Name method

**Field05**
- `InEqualTo`
  - `sin`
    - `SimplexDuplicate`: OneSided
    - `duplongEdge`
    - `SimplexDuplicate`: TwoSidedLongEdge
    - `dupshortEd`
    - `SimplexDuplicate`: TwoSidedShortEdge

**Field06**
- `InEqualTo`
  - `exit`
    - `Finishing`
      - 1 Staple Top Left Portrait
    - `top`
  - `Finishing`
    - 2 Staples Left Portrait
**File Name Composition Template**

<table>
<thead>
<tr>
<th>Action</th>
<th>Field01</th>
<th>Field02</th>
<th>Field03</th>
<th>Field04</th>
<th>Field05</th>
<th>Field06</th>
<th>Field07</th>
<th>Field08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Sequence</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sides</td>
<td>AN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finishing</td>
<td>AN</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Quantity</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

AN = Alphanumeric, N = Numeric

**Notes:**
1. Windows File System dictates a file name cannot exceed maximum 256 characters including suffix dot PDF.
2. In a job, it is your responsibility to make sure no two-file names will be same.
3. Select either Underscore “_”, Dash “-“, or Space “ ” as a Field Separation Character
4. To create distinct Groups, you may want to use customer name, order ID number, time stamp or some combination of there of.
5. To ensure correct Print Sequence, set increasing numeric value. Numeric value can be any number of digits. First value can start at any number.
6. Suggested time stamp formats are:
   a. `yyyyymmddhhmms`  
   b. `yymmdhhmmssss`

   where `yyyy` or `yy` is year e.g. 2007 or 07  
   `mm` is month e.g. 01 or 12  
   `dd`, is day of month e.g. 04 or 23  
   `hh` is military hour e.g. 17  
   `mm` is minute e.g. 54  
   `ssss` is seconds e.g. 3709 – we recommend increasing precision to hundredth of a second.
Text On Page

The Text On Page Automation Method

Large batch systems produce every day millions of transaction documents such as Monthly Bills, Financial Statements, Investment Quarterly Reports, Invoices, and Advisory Notices. Usually these documents are result of batch processing of daily, weekly, monthly transactions. Because of lower cost of PDF libraries each batch run may generate one large PDF, may be say 60,000-page file containing multiple individual Bills, Statements. Such PDF contains internal text and positioning information that SmartPDFPrintware can use to control variable production of PDF documents.

Also, when a PDF file is created by scanning pages, or from an online FAX service such as eFax, this PDF is an image of scanned page - similar to a photograph. Such PDF does not contain text information (other than file name). However, OCR technology can (e.g. ScanSoft) re-create text information from image content - without changing original file and add a hidden layer of text behind the image. SmartPDFPrintware can use hidden layer of text to control variable production of PDF documents.

You can split; burst a large PDF into separate documents (e.g. Statements) using text appearing within an area on page. This text may be Customer Number, Account Number, Invoice Number, fixed text on remittance page etc.

SmartPDFPrintware Text On Page automation method enables you to extract text within area on PDF page and use it
  • to split a large document in to Sets, and subsets,
  • to select a different media
  • to select sides
  • to select finishing

You can select specific text on a PDF page by drawing a rectangle encircling the text. SmartPDFPrintware extracts text within Selection Rectangle and displays it in a textbox. We can use this variable text to set parameters and conditional rules for variable production of PDF documents.
Typical use of Text On Page method
Intelligent Splitting of Documents

Using Text On Page method, you can split a large document into Sets such as a single Statement. Sometimes, first page (or few more pages) of a Statement (set) must be printed on a different stock and print reminder of pages on regular stationary stock. This means we have to split a Statement (set) in to Subsets. SmartPDFPrintware Text On Page method has capability to intelligently split Set to Subsets.

You can set rules and parameters for selecting different media, sides, and finishing, slip-sheet, and banner page for each Set, Subset, and a Page in job.
Navigation within Text On Page method window

During explanation of various features and capabilities of Text On Page method, we will be referring to different views within Text On Page method window. Please familiarize with these views:

- **Hot Folders (1)**
  In Hot Folders view, you see listing of hot folders you added to SmartPDFPrintware.

- **Text On Page Setup (2)**
  Text On Page Setup view displays results of your actions during setup and configuration activities. You can see relationship between

...
a workflow process control (e.g. text box that surrounds static text on page), logical operator (e.g ‘IsEqualTo’) that uses parameter (e.g ‘Year End Tax Report’) to affect resulting action (e.g. Split Document into sets). It displays in a tree view list of documents that are loaded into workspace.

In this view, you can set media, sides and finishing selection parameters for each subset in a Set.

Mixed Paper Sizes (3)
When job is loaded in workspace, SmartPDFPrintware traverses through all documents. It determines size of each PDF page of every document. It lists in “Mixed Page Size” view different page sizes it finds. Using this list, you set one “Normal Media” (e.g. in US Letter 8.5 inch x 11 inch or in Europe A4 210 mm x 297 mm) to be associated with default page size. And set other page sizes to be exception sizes and associate each exception size with corresponding “Exception Media” (e.g. in US Legal 8.5 inch x 14 inch, Tabloid 11 inch x 17 inch; or in Europe A3 297 mm x 420 mm, SRA3 320 mm x 450 mm etc). SmartPDFPrintware can handle as many Exception Media associations as there are pages sizes in job. Only limitation will be number of trays available in your printing system.

Control TextBox (4)
Control textbox will contain selected, extracted text from Current Page view (7). You can set Document Splitter control rules and parameters using this textbox.

Split Document (5)
Split Document view shows
Job Page Number (Job PN) – it lists all pages in document starting at page 1 to the last.
Set Page Number (Set PN) – it lists all page numbers of each Set (e.g. Statement). Each Set’s page number starts at ‘1’.

When you want to split a Set into Subsets each containing specific range of pages of a Set; you use this column to set beginning of each Subset.

This method of using positions of pages within a Set to create subsets of a set is called ‘Page Position’ method. For example, when you want to print certain pages of a Set (e.g. Statement)
on a different stock, you can create Subsets and do subset media and sides selection. You can also create subsets to do subset finishing.

**Splitter Static Text** (Spltr Static Txt) – it lists text extracted from the Static Text splitter control area on each page in a document. Control parameter text is highlighted. You notice beginning of a Set where control parameter text is highlighted. Set page number is reset to 1.

**Splitter Variable Text** (Spltr Variable Txt) – it shows text extracted from Variable Text splitter control area on each page in the document.

**Current** – reserved.

**Process button** – Click this button to gain access to controls that enable setting parameters to insert precut tab, separator page, and banner page.

Sets (6)

Sets view lists all Sets that SmartPDFPrintware determined using document splitting rules and parameters. It lists for each Set, starting page number of a Set in Job Page Number (Job PN) column; and extracted variable text in columns Text 1 and / or Text 2. You can see number of Sets in a Job.

Current Page View (7)

This view displays PDF page. You can scroll through document using left or right navigation buttons. You can zoom in or zoom out image.

In this view, you can draw a rectangle around text that you want to use to split up a document.

**Text Selection, Extraction process:**

Click mouse down at top left corner of text block and drag it to bottom right corner of it – setting a text extraction control. Upon releasing mouse, extracted text is displayed in selected text textbox (#4).

Status

Displays information on current activity occurring during the setup.
Split Document to Sets

You can split a document into separate Sets by extracting text within a rectangle on a page and depending on whether extracted text is blank, same or different, use this information to divide document into separate, variable length Statements, Invoices, Notices, Reports etc. Intelligent splitting enables production of variable length documents.

There are three different methods to split a document

1. Static Text
2. Variable Text and
3. Combination of static and variable text

We will explain each method in detail.

Static Text
You can split a document on a page where same control text – Static Text - is present in same selection area. This method is applicable when you are trying to split say Statements where distinct text (e.g. ‘Monthly Statement’) appears in the same area on first page of each Statement.

Variable Text
You can split a document on a page where, in same area, text changes from previous page. This method is applicable when you are trying to split a document using Variable Text such as Customer Number, Account Number which provide a reliable document splitting indicator. For this method to perform accurately, variable text within the control area from second to last page within a Set (e.g. Invoice), should be either same text as on first page or be blank.

Static Text in combination with Variable Text
Alternatively, you can split a document on a page when control static text is present and variable text changes when compared with previous occurrence of it. This method is very useful when static text is present within same area on more than one page within a Set and or when using variable text there is presence of other text in same area between second page and last page – falsely triggering splitting action. Presence of Static Text on a page acts as a qualifier for
SmartPDFPrintware to extract variable text on that page and then compare with previous value – if it changed, split the document at this page.
Document Splitter Controls
Static Text, Variable Text, and Static and Variable Text
Illustration: Static Text method

You can use Static Text method to split a document into Sets when within same area on a page, the same text (logical operator: IsEqualTo) appears at the beginning of each Set throughout the document. In the following illustration, the text ‘Year End Tax Report’ is present only on first page of each Statement and starting at page 2 to the last, same static text does not appear within same area on any other page within a Set.

Split document using Static Text
Illustration Variable Text method

Variable Text method to split a document is used when text in same area changes *(OnChange)* at the beginning of next Set. In other words, document is split when text string changes from one value to a different value or it is blank. There can not be any text present in the controlling area on intertwining pages within the Set i.e. rectangular control area will be blank. For example: A 40,000 document containing say about 12000 invoices can be split using Invoice Number that appears on the first page of each Invoice provided from page number 2 to end of each Invoice either it contains same invoice number as that on first page or the area does not contain any text – it is blank. In the following illustration, when ever Invoice number changes, the document is split on a page where, within same area, text changes from previous page.
Split document using Variable Text

[Image of the Split document using Variable Text page]
Using Static Text combined with Variable Text

When report layout is such that to correctly split document at a Set boundary, change in Variable Text has to be qualified by presence of a Static Text on the same page.
For example: “ABC Account #:” is present on every first page of Set and area where variable account number is present, there is other text present on page number 2 to end of the set. In cases like this, to prevent splitting incorrectly, use of both Static and Variable text is desirable.
Set level processes controls

You can insert before each Set precut tabs, separator page and or banner page. You can also, do finishing on each Set. These processes are accessible by left click followed by right click on ‘Process’ button in Split Document view #5.

Processes for Each Set: Precut Tab, Separator Page, Banner Page
Set Precut Tab
You can insert Precut Tab at beginning of each variable set. Variable tab text can be selected on page just before which Precut Tab will be inserted and applied to the Precut Tab.

Set Separator Slip Sheet
Insert a set separator page, slip sheet between each variable set.

Set Banner Page
Insert a Banner Page at the beginning of each set. The banner page can be either blank or optionally can contain information on number of pages in the set etc.

Set Finishing
Each variable set can be stapled, punched, made into booklet, etc.
**Split Set to Subsets**

Each variable length Set (e.g. Statement) can be split into Subsets. This may be necessary when certain number of pages in each Set (Statement) must be printed on a different stock compared to all other pages within a Set. Splitting a Set to Subsets also enables Subset Finishing. There are two methods available to split a Set to Subset (1) Position and (2) Variable Text i.e. using change in text within an area on page.

**Using Page Position**

A Set can be split tosubset by starting at a fixed page position and ending at fixed page position.

Example: Later on in a tutorial, Statements are to be split in two subsets. First subset, page 1 to 3 is to be printed one sided on a high quality stock. And second subset, page 4 to end of Set is to be printed long edge duplex on stationery.

Detailed explanation on use of Page Position to create and use Subsets is covered in step by step tutorial TOP01.
Create Subsets using Page Position – First Subset
Create Subsets using Page Position – Second Subset

Subset Media

Subset Sides

Subset Finishing
Each Subset within a Set can be printed on a different media and finished. You can access the control in Text On page setup view (2).
Subset Media selection, subset Sides selection is covered in detail in step by step tutorial TOP01.

First Subset - Subset Media, Subset Sides, Subset Finishing
Second Subset - Subset Media, Subset Sides, Subset Finishing
Examples

Example #1

Investment Statement

Situation and Structure of the Job
Print broker representing a print buyer, contracts with print provider to produce Year End Tax Report on Xerox iGen3. On average a report is about 30,000 pages containing about 850 separate Statements; one for each investment client. Each Statement consists of variable number of pages. Print broker cannot go back to print buyer for any additional post processing to PDF file for any reason whatsoever.

Business Need
Split; burst report in to separate Statements, each of which has variable number of pages. Print first three pages of each Statement one sided on a high quality paper and remaining pages from page four to end of Statement two-sided long edge on regular Stationary paper. Job must be turn around in 48 hours from receipt.
Controls

Document to Set splitting method: Static Text

Splitter Control Text: ‘Year End Tax Report’

Set to Subsets splitting method: Page Position

Subset001: From page 1 to 3
Subset002: page 4 to end of set.

Subset001 Media: 8.5” x 11”, Blue, Plain Paper
Subset001 Sides: One Sided

Subset002 Media: 8.5” x 11”, White, Plain Paper
Subset002 Sides: Two Sided Long Edge
###

Step by Step Tutorial TOP01-A: InvestmentStatements

Step by Step Tutorial TOP01-A: Split Document to Sets, Static Text, Split Sets to Subsets, Position, Subset Media, Sides

1. Objectives:
   a. Load PDF(s)
   b. Hot Folder: ‘InvestmentStatements’
   d. Document Splitting method: Static Text
   e. Static Text: ‘Year End Tax Report’
   f. Subsets:
      i. Subset 1: page 1 to 3
      ii. Subset 1 Media: 8.5 inch x 11 inch, blue, plain paper
      iii. Subset 1 Sides: Single Sided.
      iv. Subset 2: pages 4 to last page of Statement
      v. Subset 2 Media: 8.5 inch x 11 inch, white, plain paper
      vi. Subset 2 Sides: Two Sided Long Edge

2. Prerequisites:

   a. Click desktop shortcut to start SmartPDFPrintware
   b. Add Hot Folder if you have not added it previously.
      i. Example: we previously added ‘InvestmentStatements’
   c. Unzip, copy work file to the Hot Folder
      i. Example: ‘YearEnd401Statements.pdf’
      ii. Path: C:\B2BeDocuments\SmartPDFPrintware \B2BeDocHotFolders\InvestmentStatements
d. Add your printer to the Network Printer list, if you have not added it previously.
e. Follow step-by-step tutorial on how to add network printer to the list. It is located here:
   i. In this user guide go to Table of Contents (page 5), look for Network Printers » Add Network Printers
f. Select Setup menu on Main Menu Bar.

3. SmartPDFPrintware window changes to Setup
4. Select Text On Page method tab
5. Navigate to Hot Folder view (1)
6. Select Hot Folder you are going to configure
7. Select your Hot Folder
   a. Example: InvestmentStatements
8. Right Click Hot Folder.
   a. Example: InvestmentStatements
9. We are setting Text On Page automation method.
10. Select the **Text On Page** menu item
11. We load a typical PDF work file that this hot folder will be processing.
12. The **Select PDF file** dialog opens
13. Select your PDF file.
15. Click the **Open** button
16. So now, we have in Text On Page work area loaded a typical PDF document which we want to split up.
17. Go to Text On Page Setup view (#2)
18. Setup ‘Job Attributes’
19. Setup ‘Media, Finishing, Sides, Output’
20. Setup ‘Automation’
21. **Split Document**
22. You can intelligently split the document by using either **static text**, **variable text** or combination of **static and variable text**.
23. For your job, decide which document splitting method is appropriate.
24. For this tutorial, we will use Static Text method.
25. Maximize SmartPDFPrintware window
27. Click on
28. Click Go to First Page button
29. ‘**Year End Tax Report**’ static text appears on every first page of each Statement. It does not appear on any other page within a Statement. Each Statement is a Set.
31. If ‘**Year End Tax Report**’ static text is not visible in Current Page view (7), scroll view Left, or Right using Horizontal scroll bars and or scroll view Up or Down using Vertical scroll bars
32. **Draw Rectangle**
33. We are going to select document splitting action control text.
34. Click mouse down at top left corner of Static Text block and drag it to bottom right corner of it – setting a text extraction control.
35. Upon releasing mouse, the static text you selected is displayed in Selected Text textbox (#4).
36. Example: Year End Tax Report
37. Go to Selected Text textbox (#4).
38. Left click textbox (#4).
39. Right Click inside textbox (#4).
40. Example: **Year End Tax Report** text box
41. Document Splitter Control window pops up.
42. Select the » Split document, start new set menu item

43. SmartPDFPrintware will populate Job Page Number, Set Page Number and Splitter Static Text columns in Split Document view (5); will populate Job Page Number and Text 1 columns in Set view (6); and update Text On Page setup view (2).

44. We have just split a document to Sets using Static Text.

45. - - - - - Create Subsets - - - - -
46. Note: Each Statement has variable number of pages.
47. We want to split each Statement (Set) in to two subsets.
48. first subset is fixed length, from page 1 to 3.
49. second subset is variable length, from page 4 to last.
50. Let us create first subset.
51. - - - - - First Subset - - - - -
52. To set beginning of first subset, select the Set Page Number (Set PN) in Split Document view (5)
53. example: click on Set Page Number 1 in Split Document view (5)
54. Right Click Set Page Number 1
55. Set 'Page Position' dialog pops up
56. Under On every Page Position '1' of each set menu item
57. Select the » Start new Subset menu item
58. We have set the beginning of first subset
59. Note: first subset ends at page position number 3. Hence, second subset starts at page position number 4
60. So we create second subset
61. - - - - - Second Subset - - - - -
62. To set beginning of second subset, select the Set Page Number (Set PN) in Split Document view (5)
63. example: Select Set Page Number (Set PN) 4 item in Split Document view
64. Right Click Set Page Number 4
65. Select the On every Page Position '4' of each set menu item
66. Set 'Page Position' dialog pops up
67. Under On every Page Position '4' of each set menu item
68. Select the » Start new Subset menu item
69. We just created second subset.
70. It starts at page 4 and ends on last page of the Set.
71. Note: Following step is important
72. - - - - - Process Subsets - - - - -
73. Click the Process button
74. We now have initialized SmartPDFPrintware subset parameters.
75. Now we want to select media, sides for Subset starting at page position 1.
76. Subset 1 Media: 8.5 inch x 11 inch, blue, plain paper.
77. Subset 1 Sides: One Sided.
78. - - - - - Subset Media : First Subset - - - - -
79. Navigate to Text On Page setup view (2).
80. Navigate to node
81. Navigate to node
82. Navigate to node
83. Navigate to IsEqualTo ‘1’ for first subset
84. Locate child node Begin Subset for ‘1’
85. Right Click the item
86. Select the **Select** menu item

```
Select
```

87. Select the **Media** menu item

```
Media
```

88. The window opens: Select **Media for Subset**

```
Media Summary
Size: Printer Default
Color: Printer Default
Type: Printer Default
```

89. Click the **Select Media V** button

```
S Select Media V
```

90. Select the **Size** menu item

```
Size
```

91. Select the **Letter (8.50 x 11")** menu item

```
Letter (8.50" x 11")
```

92. Select the **Color** menu item

```
Color
```

93. Select the **Blue** menu item

```
Blue
```

94. Select the **Type** menu item

```
Type
```

95. Select the **Plain Paper** menu item

```
Plain Paper
```

96. Click the **OK** button

```
OK
```

97. SmartPDFPrintware updates Begin Subset node for Subset 1

98. **Subset Sides : First Subset**

99. To set Sides for first Subset

100. Locate child node **Begin Subset** for ‘1’

```
Begin Subset
```

101. Right Click the item

```
Begin Subset
```

102. Select the **Select** menu item

```
Select
```

103. Select the **Simplex Duplex** menu item

```
Simplex Duplex
```

104. Select the **Simplex** menu item

```
Simplex
```

105. We have set Media and Sides attributes for first Subset.

106. **Subset Media : Second Subset**
107. To set media and sides attributes for second Subset that starts at Page Position 4
108. Subset 2 Media: 8.5 inch x 11 inch, white, plain paper.
110. Navigate to nodes ‘Position’ » 'Page Position Subset' » 'IsEqualTo' » '4' » 'Begin Subset' menu item
111. Select the ‘Begin Subset’ item 
112. Right Click the item 
113. Select the Select menu item
114. Select the Media menu item 
115. window opens: Select Media for Subset
   a. Click the Select Media V button
116. Select the Size menu item
117. Select the Letter (8.50" x 11") menu item
118. Select the Color menu item
119. Select the White menu item
120. Select the Type menu item
121. Select the Plain Paper menu item
122. Click the OK button 
123. SmartPDFPrintware updates Begin Subset node for Subset 2
124. - - - - - Subset Sides : Second Subset - - - - -
125. To set sides for second subset
126. Select the ‘Begin Subset’ item
127. Right Click the item
129. Select the **Select** menu item

130. Select the **Simplex Duplex** menu item

131. Select the **Two Sided Long Edge** menu item

132. We completed setting media and sides attributes for Second Subset.

133. Save setup

134. Next Steps:
   a. Print or start hot folder

###

**Step by Step Tutorial TOP01-B – Set Precut Tabs**

1. Objectives:
   a. Insert Precut Tab before each Set (Statement)
2. Prerequisites:
   a. Complete tutorial TOP01-A
3. ***- - - - - Set Precut Tab - - - - -***
4. To set Precut Tab insertion before each Set
5. Navigate to Split Document view (5)
6. Locate **Process** button
7. Click the **Process** button
8. Right Click the **Process** button
9. Select the **For All Sets** menu item
10. Select the **Insert PreCut Tab** menu item
11. Save setup
12. Next Steps:
   a. Print or Start hot folder.

###
Step by Step Tutorial TOP01-C – Set Separator Slip Sheet

1. Objectives:
   a. Insert Precut Tab before each Set (Statement)
2. Prerequisites:
   a. Complete tutorial TOP01-A
3. - - - - - Set Separator Slip Sheet - - - - -
4. To insert Separator Sheet between each Set
5. Right Click the Process button
6. Select the For All Sets menu item
7. Select the Separator Sheet between Sets menu item
8. window opens: Select Slip Sheet

   a.

9. Click the V Select Media V button
10. Select the Size menu item
11. Select the Letter (8.50" x 11") menu item
12. Select the Color menu item
13. Select the Yellow menu item
14. Select the Type menu item
15. Select the Plain Paper menu item
16. Click the OK button
17. Save the workflow setup. Click the Save button at the bottom right of the window.
18. Next steps:
19. You can immediately print current job and verify results of your setup.

20. Once you are satisfied with the results, you can start monitoring this hot folder. If a next job is exactly like the current job, when next job is copied or dragged and dropped to the current hot folder, SmartPDFPrintware will automatically process the next job using the rules and parameters saved in its setup file.

###

**Text On Page method**

**Rules and Parameter driven Variable Document production**
Save

Click Save button to save the setup.
Print

Click Print button to manually process the job.
Reset

Reset clears all views and reinitializes buffers. To start a new job setup, instead of stopping and re-starting SmartPDFPrintware, just click Reset button.
Hot Folder Operation

Watcher

Each print workflow has its own Hot Folder Monitor that monitors its own Hot Folder. Once print job workflow rules and parameters are captured and saved in UDPWAEO, the Hot Folder Watcher can be started either automatically or manually. Hot Folder Watcher continuously monitors its assigned Hot Folders for incoming jobs for automatic processing based on the rules and parameters in UDPWAEO.

Operation

Once a hot folder watcher is started, as print jobs arrive in hot folder, depending on how job schedule event timer is setup, the jobs will be processed. Hot Folder event timer starts “Print Job Workflow Processor” – the Processor. Hot Folder Watcher passes to the processor UDPWAEO and List of PDF Files in the print job. The processor parses UDPWAEO and determines which Printing System Specific Plug-In is required for the print job. The processor launches the Plug-In DLL and passes to it UDPWAEO and List of PDF Files. The plug-in is a “Sequential State Machine”. It uses values saved during the setup in UDPWAEO to process the PDF files. The plug-in emits very printing system specific print data stream with both control commands which selects media, selects finishing, and insert tabs and slip sheets etc and marking commands to print on page. End result is touchless production of high value added jobs with little or no manual intervention.

Start Watcher

1. Select the Hot Folders menu item
2. Example: Hot Folder name: ‘BulkMail’. Select the item
3. Right Click the item
4. Select the Start BulkMail menu item
**Incoming Print Jobs**
Remote document composition systems can copy, FTP, or locally you can drop and drag print-ready PDF files into the Hot Folders.

**Stop Watcher**

1. Select the **Hot Folders** menu item
2. Example: Hot Folder name: ‘BulkMail’. Select the item
3. Right Click the item
4. Select the **Stop BulkMail** menu item
Appendix
Support Policy

B2BeDocuments requires continuous coverage for support agreements. Software licenses with an expired warranty or support agreement are considered to be “out of support compliance.” Support Services Reinstatement provides the opportunity to bring these Software End User License Agreements back into compliance and up to date. Generally, new agreements are retroactively activated to the expiration date of the most recent warranty or support agreement.

If there is a lapse in the software support term, B2BeDocuments will reinstate support only after customer pays all then-current back fees going forward and reinstatement fees.

Should a customer fail to renew maintenance by the expiration date the following reinstatement fees shall apply:

- Within ninety 90-days of expiration, the amount to reinstate support shall be
  i. no reinstatement fee will be applied
  ii. pay one (1) full year of support

- Within ninety-one (91) to one hundred eighty 180-days, the amount to reinstate support shall be
  i. reinstatement fee equal to annual support fee multiplied by 0.6
  ii. plus one (1) full year of support.

- Within one hundred eighty one (181) and three hundred and sixty five days (365) days the amount to reinstate support shall be
  i. reinstatement fee equal to annual support fee multiplied by 1.2
  ii. plus one (1) full year of support.

- After three hundred and sixty five days (365) days the amount to reinstate support shall be
  i. reinstatement fee equal to back annual maintenance fee multiplied by 2.0
  ii. plus one (1) full year of support.
Help Us Help You

Whenever you want help, please send us your PDF test files and SmartPDFPrintware UDPWAEO XML file.

Software Editions

- SmartPDFPrintware – Standard Edition
  Includes Position Method and PDFPrintwarePlugIn1200 plug-in
- SmartPDFPrintware – Professional Edition
  Includes Position, File Name Methods and PDFPrintwarePlugIn1200 plug-in
- SmartPDFPrintware – Enterprise Edition
  Includes Position, File Name, Text-on-Page Methods and PDFPrintwarePlugIn1200 plug-in
Installation
Step by Step Tutorial

1. - - - - - Prerequisites - - - - -
   a. Full version of Adobe Acrobat 8.0 Professional or later is required.
   b. Microsoft .Net Framework 3.5 should be installed.

2. - - - - - Start Installation - - - - -

3. SmartPDFPrintware will be installed on a local drive.
   a. example: i drive.

4. Locate zipped file from B2BeDocuments
   a. example: s2345678.zip

5. Unzip it to a temp folder
   a. example: SPP

6. Locate ‘setup.exe’
   a. example: ‘i:\SPP\Setup.exe’

7. Launch setup program

8. window opens: B2BeDocuments™ SmartPDFPrintware™
9. If you agree with terms and conditions of End User License Agreement, please click the **I Accept** button

10. window view changes.

11. To start the process,

a. Click the **Install** button

13. If every item checks out, will display list of local drives

14. Click the scroll bar up or down to drive you want to install SmartPDFPrintware on

15. example: Select the I: \ drive

16. once you select the drive, Next >> button is enabled

17. Click the Next >> button

18. Setup creates folders and copies files.

19. Click the Finish button

20. Setup places a short cut on your desktop
21. SmartPDFPrintware License ID
22. SmartPDFPrintware Unlock Key
23. SmartPDFPrintware License ID
24. SmartPDFPrintware Unlock Key with MAC Address

25. All Hot Folders will be under 'B2BeDocHotFolders'

26. Hot Folders Root

27. Unlock Key with MAC Address
SmartPDFPrintwareUnlockKey

28. License ID
SmartPDFId.xml
29. **Missing Unlock Key Screen**

30. If Unlock Key file is missing or MAC Address of your PC is different from what is in the Unlock Key file following window will display

![Request Unlock Key Screen](image)

Sorry, we are unable to locate SmartPDFPrintware™ Unlock Key.

We are compelled to close this software.

To obtain your own unlock key for this SmartPDFPrintware™
please send us this PC’s Ethernet Card MAC Address (physical address)

If you meet our requirements and are approved,
we will generate unlock key and email it to you.

Phone: 215-542-8383
Email: SPMACAddress@B2BeDocuments.com

B2BeDocuments
P. O. Box 154
Blue Bell, PA 19422 USA


Thanks for your interest in SmartPDFPrintware™.

31.

32. **How to find MAC Address**

33. Go to Command Prompt, type `ipconfig /all`

34. ‘Enter’

![Command Prompt](image)

MAC Address is Physical Address of Ethernet adapter

35.

36. Contact B2BeDocuments to obtain Unlock Key.
37. To launch the software double click on **SmartPDFPrintware** shortcut.
39.
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