



# **JetTrac OutputDirector<sup>TM</sup>**

## **User Guide**

**Version 4.59**  
**November 16, 2007**

**JetTrac OutputDirector™ User Guide**  
**November 16, 2007**

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# 1.0 INTRODUCTION

## 1.1 Purpose

This document is a guide to installing, configuring and using the JetTrac OutputDirector™ system.

In this document, “Central” refers to JetForm Central and Adobe Central Pro equally. JetTrac OutputDirector may be referred to as OutputDirector or just JTOD.

## 1.2 Background

**JetTrac OutputDirector™** is a fully integrated distribution tool for Central. JetTrac OutputDirector automates the setup and production of multi-directed E-mail, fax, Internet fax, Web delivery, archive and print distribution from a single stream of Central documents. E-mail addresses and fax numbers can be included in the original data stream or added using this system. Batches are sorted and grouped so each vendor or customer gets only one E-mail or Fax, or both, with all of their documents from the batch, whether their documents were originally together or not, adding a more professional look and feel to the output.

The Internet E-mail output capability includes not only sending Internet E-mails from within Central, but also automatically converting Central output to PDF and attaching it to the E-mails. Or, you can post the PDF to a web site and have OutputDirector send the user a link where they can download the PDF. Formatted, HTML text and graphics for E-mail message bodies are also provided and automated. This gives E-mail messages a real pizzazz and life that really makes them stand out with users.

On a case-by-case basis, each vendor or customer’s documents can be set up to have more than one form of output, be it print and E-mail, fax and archive, or print, fax, and E-mail, just to name a few of the combinations. Creating PDF archives of some or all of the documents is also automated, including giving the documents intelligent filenames, reflecting the data in the documents. JetTrac OutputDirector also fully integrates with the optional R-File Manager system for search and retrieval of archived documents.

The entire system is set up in several screens in the MS Windows Wizard format. Knowledge of Central Field Nominated Files or the technical underpinnings of Central is not required. JetTrac OutputDirector also makes all of the necessary changes and additions to the Central Job Management Database. This makes it a snap for anyone to implement and start bringing Central into the Internet Age.

Both Central and Central Pro are supported. Central Pro 5.3 and newer versions have PDF output capabilities and E-mail sending capabilities. JetTrac OutputDirector provides many advanced automation capabilities beyond PDF and E-mail that Central Pro cannot do.

JetTrac OutputDirector works with any version of Central from the old JetForm Server 4.0 through Adobe Central Pro Output Server 5.5. JetTrac OutputDirector supports Windows and Unix platforms.

JetTrac software is the product of Pro Technology Automation, Inc. Pro Technology is an industry leader developing custom Central solutions. Pro Technology has over seven years of experience with hundreds of clients, providing custom agents, development, consulting, implementation and training for Central solutions.

### **1.3 Organization of this Document**

Section 1: Introduction

Section 2: JetTrac OutputDirector™ Setup Checklist

Section 3: Intallation of JetTrac OutputDirector™

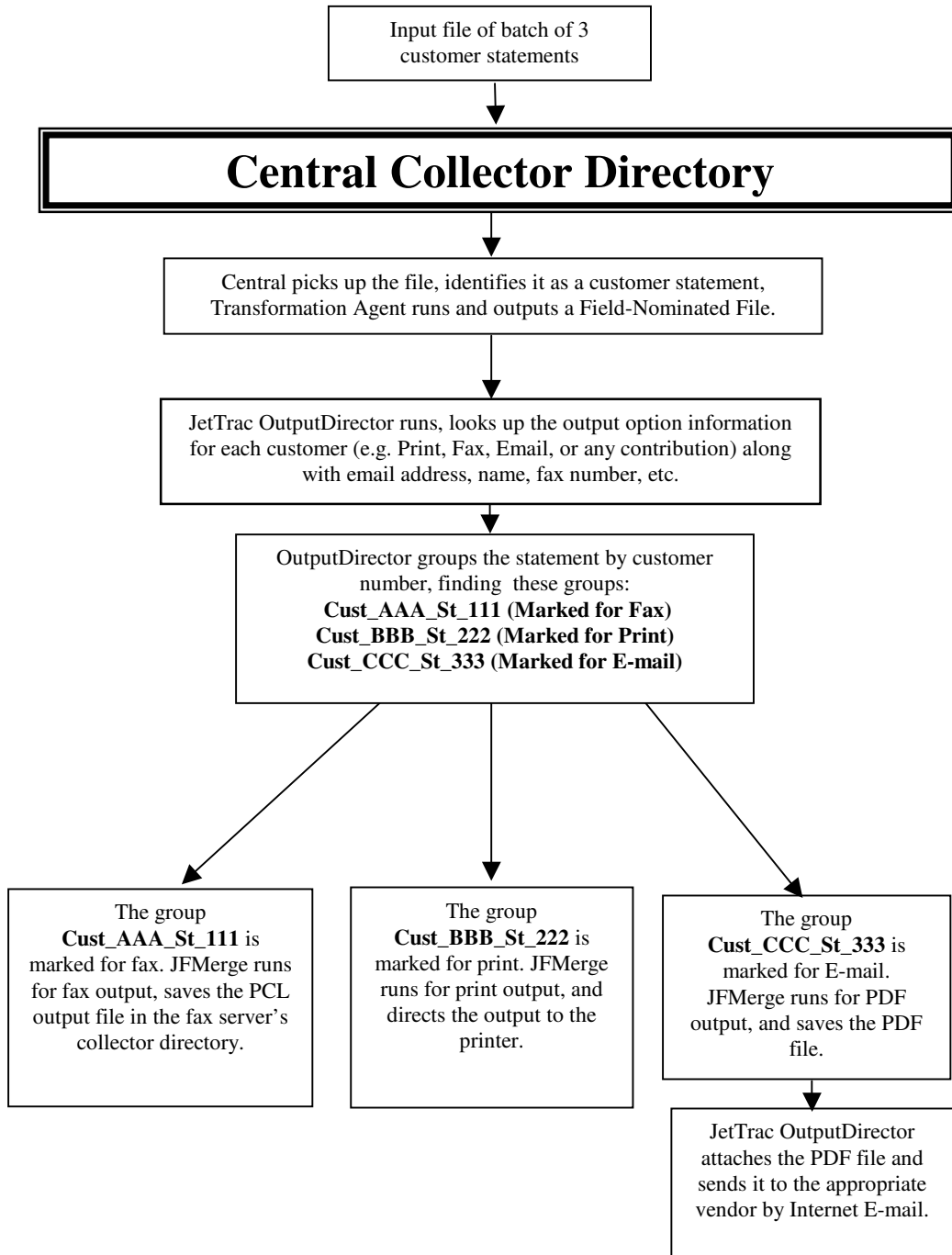
Section 4: Configuration of JetTrac OutputDirector™

### **1.4 Technical Support**

If you need assistance in installing and configuring JetTrac OutputDirector™, call Pro Technology Automation, Inc. at 805-527-1248 or email us at [support@protechinc.com](mailto:support@protechinc.com). Please note that the JetTrac OutputDirector™ license fee does not cover configuration services and technical support so there may be an additional charge. Please ensure you read these instructions carefully before calling for technical support.

## 1.5 Typical Central job flow using JetTrac OutputDirector™

This is a diagram showing the job flow for a typical fax server application distributing Customer Statements. In this application, the output file has a field called “**VENDORNUM**” that JetTrac OutputDirector™ uses to separate the output documents. There are many possible values for the field, but we will say this file has only three values of **111**, **222**, and **333**: In JetTrac OutputDirector field called “**OutputOption**” that tells Central how each vendor wants their documents sent to them. Possible values are: **F** for fax, **P** for print, and **E** for E-mail. Because all documents for each vendor are going the same way, we will group by vendor, but mark the output files with the **OutputOption** code so Central will know what to do with the files when it gets them.



## 2.0 JetTrac OutputDirector™ Setup Checklist

Before using JetTrac OutputDirector, you must have completed or have an understanding of the following:

- ✓ Have a production quality data file .....
- ✓ Have a TDF file, unless you already have a Field Nominated File (FNF) .....
- ✓ Created a sample FNF using the data file and a TDF .....
- ✓ Have Forms created for print, fax, and/or email (can all be the same form)....

Below is the information you must know before you can start using JetTrac OutputDirector, lines are provided for you to fill out.

- 1. Name and location of your sample Field Nominated File \_\_\_\_\_
- 2. First field name in each document in the FNF \_\_\_\_\_
- 3. Desired Name of new JetTrac OutputDirector Job \_\_\_\_\_
- 4. What is the name and path of the TDF (data mapping) file? \_\_\_\_\_
- 5. You will set up an output options table that matches up output options with vendors or customers. If you need to add E-mail addresses, names, fax number, or other information, you can add them as well. Use a table like this to assemble the info (the top two rows are samples):

Vendor Number	Output Option	E-mail Address	Fax Number
11294	E-mail	dotj@aol.com	
11287	Fax		415-334-2245

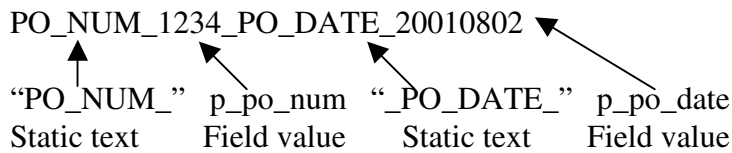
- 6. What is name of the Key Field that you will be using to lookup your Output Options? For example, for Purchase Orders it would probably be Vendor Number. For Invoices it would probably be Customer Number.  
\_\_\_\_\_
- 7. What field do you want to use to break the documents apart? For example, for Purchase Orders if you want to group by Vendor to send only one fax or email for each vendor, you would break on Vendor Number. If you want to send each Purchase Order as a separate fax or email, break the batch on Purchase Order Number.  
\_\_\_\_\_
- 8. Location and filename of form (MDF) to use when printing \_\_\_\_\_

- 9. Location and filename of form (MDF) to use when faxing \_\_\_\_\_
- 10. Location and filename of form (MDF) to use when emailing \_\_\_\_\_
- 11. For the documents to print what is the name of the printer? \_\_\_\_\_
- 12. For the documents to fax what is the “name” of the fax server? \_\_\_\_\_

13. Location and folder name of where you want to store the PDF files that are temporarily created.  
\_\_\_\_\_

14. Location and folder name of where you want to store the PCL files that are temporarily created.  
\_\_\_\_\_

15. If you want, you can have custom names for the PDF files you E-mail. For example if you want the name to look like this:



16. What is your SMTP address? \_\_\_\_\_

17. Will your SMTP server allow relays to all of the destinations you plan to send to? \_\_\_\_\_

18. Does it need SMTP authentication? If so, we need the user name/password. \_\_\_\_\_

19. What is the field name that contains the name you are sending the email to\*? \_\_\_\_\_

20. What is the field name that contains the email address you are sending the email to\*? \_\_\_\_\_

21. What is the field name for the email subject\*? \_\_\_\_\_

22. What is the body of the email going to say, or if it has a fieldname in your Field Nominated File?  
\_\_\_\_\_

\*These maybe fields that you created in the Output Options Screen

## **3.0 INSTALLATION OF JETTRAC OUTPUTDIRECTOR™**

### **3.1 Installing Java**

OutputDirector is a Java application so Java must be installed. Refer to the document *JetTrac Java and Licensing Considerations* for installing the Java Runtime Environment (Java) and generating a site code for your site. It is available on the web at [www.protechinc.com](http://www.protechinc.com) on the JetTrac page.

### **3.2 Installing JetTrac OutputDirector™**

After the Java Runtime Environment is installed, you are ready to proceed to the JetTrac OutputDirector™ installation file. Simply extract JTOD.zip to c:\JetTrac\OutputDirector

### **3.3 The JetTrac OutputDirector™ License Key File**

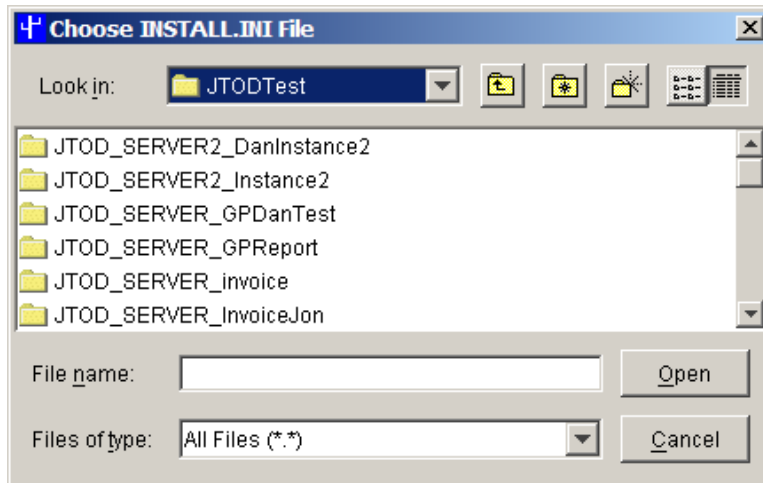
As with all JetTrac products, JetTrac OutputDirector™ is protected by the JetTrac License Manager system. This system locks JetTrac OutputDirector™ for use exclusively to one server or system in your organization. It works in this manner:

1. You run JetTrac SiteCode on your computer and generate a unique site code file for your system.
2. You send that site code file to Pro Technology Automation.
3. Pro Technology uses your site code file to generate a product license key file.
4. Pro Technology sends the product license key file back to you.
5. When JetTrac OutputDirector™ runs, it scans the system and compares the tokens it finds with the tokens found in the license key file, and if they match, it runs normally.

Refer to the document *What you need to know about Java and JetTrac Licensing* for further information.

## 4.0 Configuration of JetTrac OutputDirector™

To start JetTrac OutputDirector, click on the **Start** menu, then scroll over to **Programs, JetTrac OutputDirector**, then click on **JetTrac Output Director**, or double-click on the **OutputDirector Setup.jar** file. The first thing that OutputDirector does is to search for Central installed on the computer where you are running OutputDirector. If it cannot locate the Install.ini, it will display a dialog box asking you to locate the Install.ini:



**Browse** for your Install.ini file and click the **Open** button.

## 4.1 Application Screen



Once the Install.ini file is opened and processed you will see the Application screen. This is the screen where you pick the name of the application that you want OutputDirector to work on. It will usually be a name something like PO or Invoice. The first time setting up an application, you must enter the application name, pick the Central instance to install into, and click the create button. After you have previously created a job in OutputDirector, you can pick it from the pull-down list.

If you pick the name of a Central job that does not already exist in that instance, OutputDirector will create a new Central job in your JMD for you. If you already have a job in your JMD for that instance, OutputDirector will overwrite the current job in that instance.

If you type in a new application name, click the **Create New Application** button then click the **Next** button. If you want to edit an existing application then select that application then click the **Next** button.

## 4.2 JMD Options Screen

Then you will get this welcome screen. Fill out the top three fields accordingly. These fields will be used to create the key files needed to run OutputDirector on your server. The latest values entered in these top three fields will be saved for use in future jobs. However, the saved values can be overridden.

JetTrac OutputDirector Job Setup Tool - newdocJT in SERVER

File Tools Help

Welcome to JetTrac OutputDirector

Name  
John Doe

Company Name  
company

E-mail Address  
info@protechinc.com

Select Processing Options

Input data format	Raw (Use TDF file)
Get Addresses/Numbers from	Insert with JetTrac Lookup
Output File Production	HTML Document
PDF Security	Off
To send eMail	Use JetTrac E-mail
Fax output type	No Fax
Archiving	No Archiving
Archive File Type	PDF
Processing Level	Document Level

Priority Processing

(V4.09, 18 Mar 2005)

Back Cancel Next Finish

## 4.3 JMD Options

There are many different options that you can set in OutputDirector in order to automatically build all the information in the Job Management Database in order to do production processing. **This is a very important step as it determines how the job management database will be built.** There are hundreds combinations of options and a very important part of OutputDirector is automatically building the Job Management Database with exactly the information that is needed to do your desired production processing. Here is an explanation of the options:

### Option 1 - Input data format:

1. Your input to JetTrac OutputDirector is a **Raw** data file that must be Transformed using the Central Transformation Agent. This will require a step in the Job Management Database that runs the Transformation Agent.
2. Your input to JetTrac OutputDirector is a Field Nominated File that is being created in some other application, specify **FNF Stream**.
3. Your input to JetTrac OutputDirector is a PDF file that you will use to extract the fields from, select **PDF Format**.
4. Your input to JetTrac OutputDirector is an **XML stream**. You can specify options for the Adobe Central XMLImport tool on the next screen if you wish, for instance, to specify an XSL stylesheet.
5. Your input to JetTrac OutputDirector is an XML stream, that you then also plan to process with a TDF file with the Transformation Agent, jftrans. You will specify a tdf file name along with any XML options you require. Select **XML/TDF Conversion**.

### Option 2 – Get Addresses/Numbers from

1. The Output Options are not specified in your data file and you wish OutputDirector to build and maintain a table that contains all this information. This is the option **Insert with JetTrac Lookup** which is part of OutputDirector.
2. Your Output Options and all related information needed for each option is already found in your input data file. Select **Found in Data Stream**.
3. Your Output Options and all related info need to be looked up from one of your tables. This option allows you to use the database upgrade, JetTrac DBConnect. Select **Retrieve from Database**.

### Option 3 – Output File Production

1. If you are not having Central Pro produce your PDF file directly, you might be using Visual Software's PCL2PDF. OutputDirector will take Central's PCL output and convert it to PDF for you. In this case, select **Use Visual Software PCL2PDF**.
2. If you DO have Central Pro 5.3 or above you probably want to produce your PDF files directly from Central. If so you would choose **Use Central Pro**.
3. If you wish to output something other than an PDF file, like an MS Excel-compatible XLS file, then pick **Spreadsheet**. OutputDirector currently supports XLS file production for E-mail and Web Delivery only. Contact ProTechnology for details on how to make this happen.
4. If you are using Central's meta driver to produce XML output from Central that will then be converted to PDF, select **XMLtoPDF**.

5. If you are not having Central Pro produce your PDF file directly, you might be using PageTech's PCL2PDF. OutputDirector will take Central's PCL output and convert it to PDF for you. In this case, select **Use PageTech PCL2PDF**.
6. If you are not having Central Pro produce your PDF file directly, you might be using JetTrac PCL2PDF. OutputDirector will take Central's PCL output and convert it to PDF for you. In this case, select **Use JetTrac PCL2PDF**.
7. If you want no PDF file, but instead want just HTML for use in your email message body, select **HTML Document**.

#### **Option 4 – PDF Security**

1. If you don't want any PDF security, select **Off**.
2. If you want PDF security and you are using Visual Software's PCL2PDF, select **Locking with PCL2PDF**. You will have to set up the passwords and options in PDF Security dialog on the Destination Options screen.
3. If you want PDF security and you are using Central Pro to produce PDFs directly. And if you are using Central Pro 5.5 and later, select **Locking with Central Pro 5.5 & Later**.
4. If you want PDF security and you are using Central Pro to produce PDFs directly. And if you are using Central Pro 5.4 or earlier, select **Locking with Central Pro 5.4 or earlier**.
5. If you want PDF security and you are using Central Pro to produce PDFs directly. And if you are using Central Pro 5.4 and earlier, select **Locking with JetTrac PCL2PDF**.

#### **Option 5 – To Send email**

1. If you are not sending any email at all, pick **No Email**
2. If you do not have Central Pro you cannot email directly out of Central. We have our own program to send emails called JetTrac Email which is bundled with OutputDirector. Pick **Use JetTrac E-mail**.
3. If you DO have Central Pro 5.3 or above you may want to use the Messaging Agent which can email files from Central. If so, you would choose **Use Messaging Agent**. You will have to make specific changes to your FNF stream to support Messaging Agent. You also will not be able to use an HTML body nor most of the advanced features of JetTrac E-mail.

#### **Option 6 – Fax Output Type**

1. If you will not be sending faxes with this application you would choose **No Fax**.
2. If you have a Fax Server such as RightFax or VisiFax or any other fax server directly supported by Central you would choose **Fax Server**.
3. If you need a lower-volume, no up-front cost fax solution, it is built into OutputDirector. It is a service called **R-Fax**. You must establish a fax account before you can start using this option. Charges are calculated per page and are based on your volume and required delivery timeframe. Contact Pro Technology for more details. To do this, pick **R-Fax Service**
4. If you have low volume needs for faxing, you may be able to make your Windows XP or 2003 server fax for you through a modem. To implement with this option, select **MS Fax Integration** and fill in all of the fields in MS Fax Setup off of the Tools Menu as well as the Fax fields on the Fax tab of the Destination options screen.

### Option 7 – Archiving

1. Choose **No Archiving** if you do not want to archive your documents OR if your archiving requirements are already met by storing the archive (e.g. PDF) files in the location specified for emailing the document, and you do not select delete PDF files on the E-mail screen.
2. Choose **Just Create Image Files** if you wish to archive all your documents in a specific location to be used for archiving purposes only OR if you wish to archive differently than how you are distributing your documents. For example, if you are emailing Purchase Orders you may wish to group all the PO's for each vendor together to send one PDF file with all PO's for that vendor. However for archiving purposes you probably want each PO to be in its own PDF file. Be sure to select the file type in **Option 8**.
3. Select **Create & FTP Image Files** to first create the image files, as in **Just Create Image Files**, but it then sends the created image files to an FTP server. The FTP setup will be documented later.
4. The option for **Tyler EDMS Sys** is to implement the document management system provided by Tyler Munis. Refer to additional documentation from Tyler for setup instructions.
5. Choose **R-Imaging** if you have the RedMap document management system and need OutputDirector to automatically place and index documents into that system. You will have to set up the integration in a later screen in OutputDirector.
6. Choose **R-Imaging (remote)** if you have the RedMap document management system and need OutputDirector to automatically place and index documents into that system. Chose this option if OutputDirector needs to automatically fax your document and index file to a remotely hosted RedMap server. You will have to set up the integration in a later screen in OutputDirector.
7. Choose **Gauss** if you have the Gauss document management system.
8. Choose **Create CSV Indexes** to create image files and also provide a delimited data stream for an index file to accompany the image file. OutputDirector provides an integration screen for you that will be documented later. You will have to set up the integration in a later screen in OutputDirector.
9. Choose **R-File Manager** if you have the R-File Manager document management system and need OutputDirector to automatically place and index documents into that system. You will have to set up the integration in a later screen in OutputDirector.
10. Choose **FileBound** if your system is the FileBound system.
11. Choose **Mobius** if you need to integrate with Mobius.
12. Choose **Custom** if you need to integrate with Custom.

### Option 8 – Archive File Type

1. Choose **PDF** to have OutputDirector produce archive PDF files of your documents. OutputDirector will produce the PDF with the Output File Production method you selected in **Option 3**.
2. Choose **PCL** to have OutputDirector produce archive PCL files of your documents.
3. Choose **PT TIFF** to have OutputDirector produce archive TIFF files of your documents using PageTech's PCLXForm.
4. Choose **SV TIFF** to have OutputDirector produce archive TIFF files of your documents using SwiftView's SwiftConvert.

**Option 9 – Processing Level (see details later in this User Guide)**

1. To have OutputDirector break up batches of your documents, and process each document individually, pick **Document Level**. This is the default behavior.
2. To have OutputDirector process batches of documents together as a whole, and E-mail the batch, as well as printing the batch to several printers, select **Batch Level – Print**.
3. To have OutputDirector process batches of documents together as a whole, and E-mail the batch, but **not** print the batch, select **Batch Level – No Print**.

**Priority Processing.** When you check the box for priority processing, the secondary jobs will be thrown to the Control directory rather than Collector directory. This will cause the entire job to finish before moving on to another job in the Collector directory.

Click the **Next** button.

## 4.4 Basic Information Screen

JetTrac OutputDirector Job Setup Tool - newdocJT in SERVER

File Tools Help

### Basic Information

Sample Field-Nominated Input File: C:\JetTrac\JTOD\DemoDocs\POAck\JetTrac\POAck.fnf Browse Refresh Field List

First Field in each document: StartDoc

Location of jserver.ini: C:\Adobe\Central\Server\jserver.ini Browse

Location of Job Management Data Base: C:\Adobe\Central\Server\jserver.jmd

Data Conversion (TDF) File: C:\JetTrac\JTOD\DemoDocs\POAck\JetTrac\POAck.tdf Browse

XML Options

To begin, select a sample data file (Central Field Nominated File).

Back Cancel Next Finish

1. In the **Sample Field-Nominated Input File** field, browse for your Field-Nominated File (FNF). Here is an example of a Field-Nominated File (FNF):

```
^job PO
^field InvoiceNumber
1234
^field CustomerName
ABC Company
```

OutputDirector will then scan your FNF and build a field list of all fields in the document. It does this by looking for the first ^field or ^global in your FNF then reading in the file to the next occurrence of that same field name. If you have changed your field list since the last time you ran this job in JetTrac OutputDirector, click **Refresh Field List** to see the changes.

2. In order to properly process your job, OutputDirector needs to know the first field in each document of the batch. It guesses what it thinks it is, but please ensure that it has guessed correctly, and change the field if wrong.
3. If you are using a TDF file to process you data file, or another file to help you process an input PDF file, OutputDirector needs to know what file to use. **Browse** for that file.
4. If you are using XML as an input file type, you might want to specify options for the XML Import Agent, including for instance, and XSL stylesheet. Enter them at **XML Options**.
5. Click Next.

## 4.5 Destination Options Screen

JetTrac OutputDirector Job Setup Tool - newdocJT in SERVER

File Tools Help

### Destination Options

Output Option Field:

Number of lines before start of document:

Print Preferences

Printer in original Job Card

Printer specified in a field

Printer(s) from JMD

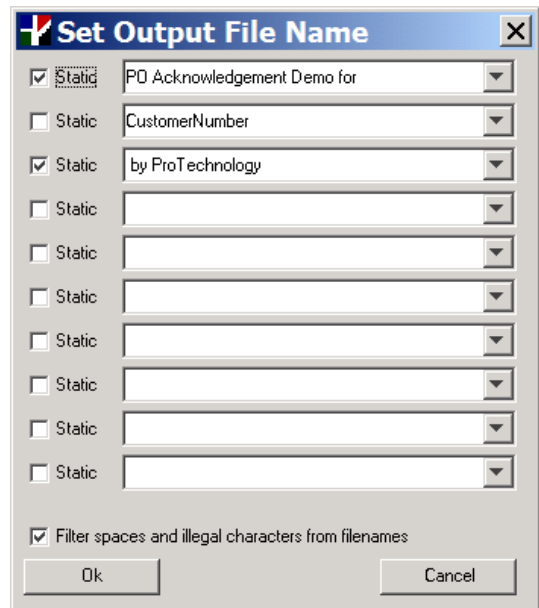
Printer 1	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 2	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 3	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 4	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 5	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 6	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 7	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 8	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>
Printer 9	*	Form:	<input type="text"/>	<input type="button" value="Browse"/>	Options:	<input type="text"/>

Extra Printer  Form:   Options:

Output Director can separate your documents in two different ways. It can group them, so that all of the documents for a vendor/customer will be sent as a group, or it can separate them so all documents will be sent separately, regardless of them being for the same person.

1. In the **Output Option Field** make sure that the same field name that was in the Distribution Options table is shown, if you are using JetTrac Lookup and you don't have that field already in your datastream. If you do have a distribution field in your data stream, select that field. If you're not sure, select the **OutputOption** field from the list.
2. If the first field in each document is not the top line of each document, enter the number of lines to read back in the file for OutputDirector to be able to break the batch apart in the correct place.

3. Next is the **Set Output File Name**. These boxes allow you to create the PCL and PDF filenames by intermingling static text and field values from the FNF. **This is important because the output file name determines whether output is grouped or individual. If a static filename is used, all documents will end up in one file. If a field that is unique in every document is used, each document will be processed separately.**

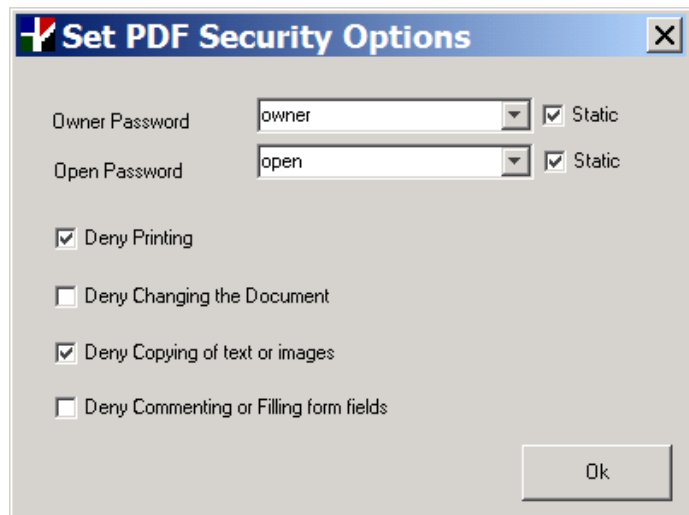


Consider this example: for a document with a PO number of **33456** that was created on **11-24-2000**, the PDF filename could be **IN\_33456\_DATE\_11-24-2000.pdf**. If your PO number field was **PONum** and your date field was **PODate**, then you would do this:

- a. In the first box, **check static**, then enter the text **IN\_**
- b. In the second box, **uncheck static**, and pick the field **OrdNum**
- c. In the third box, **check static**, then enter the text **\_DATE\_**
- d. In the fourth box, **uncheck static**, and pick the field **PODATE**

By default, **Filter spaces and illegal characters from filenames** is not checked. This checkbox will allow you to filter characters out of the fields from your data so that the filenames that are created will be legal in most file systems. If you check this box to enable filtering, but for some reason, you do not want to filter some of the fields, (for instance, filter a date field, but not a name field), then add @ to the start of the field name. So if you checked the filter box, but did not want to filter the use of the field “name” in your output, first pick the field name from the drop down, then manually add an @ in front of the fieldname, so you get @name. Do NOT check the static box, or it will not recognize this as a field.

4. Next is **PDF Security Options**. If you selected one of the PDF security options in the JMD Options screen, you can use the settings here to configure the PDF security for your documents that are emailed. There are two main types of options:



- a. **Passwords**. The Owner password is required to change the security options of the document from within Adobe Acrobat. The Open password allows the user to open the document, but does not allow changing the security options shown here. The Owner password can also be used to open the document.
- b. **Options**. The four standard PDF security options are provided for. Please refer to Adobe’s documentation for more specific information about what each of the four options does in detail.

## 4.6 The Destination Options Tabs

The tabs below are to help you select what Central form templates (MDF files) and printers you will use for Print, Fax, E-mail, Web Delivery, and Archiving options.

### 1. The Print Tab

If you have chosen no **Output Options** document keys to print, skip to the **Fax** tab,

1. Up to nine static printers/forms can be chosen here. In addition, an extra printer can also be used. For the nine static printers as a group, you have these general options:
  - a. Use the printer named on the original job card. If you are passing a `-z[printer]` on your job card to Central, and would like your documents that print to use that printer, pick **Printer in original Job Card**.
  - b. Use custom printers as specified in the data stream. The value in the field can be either printers already in the JMD printer table, or specifically name an output UNC where the print queue is found. Select **Printer specified in a field**. Then select the field where this custom printer will be found. This field can come from one of two sources.
    - i. In your **Output Options** table, create a field specifically for printers. Then, for every document key that includes print as part of the **Output Option**, make sure you have a printer entered.
    - ii. If you are passing a printer from your system for use as the destination of each document, pick the field that contains the printer.
  - c. Use printers already in the JMD printers table. Select **Printer(s) from JMD**.
2. For each output, pick the printer that you want the printed documents to go to, if you picked **Select Printer(s) from JMD** or leave the printers as \* if you selected one of the other two general options.
3. For each printer in the list that you want to use, select the form template (.mdf file) and enter any print agent options that you need to use. You can use different form templates and print agent options for each line. If you selected **Printer(s) for the JMD**, you can select a different printer for each line, if you like.
4. The **Extra Printer** can only use either the printer from the original job card or a printer contained in a field, regardless of which of the three general options you selected above. The field value fed to **Extra Printer** is never filtered, regardless of the position of the filter switch in the file-naming dialog. This is to facilitate things like backslashes \ in printer URLs.

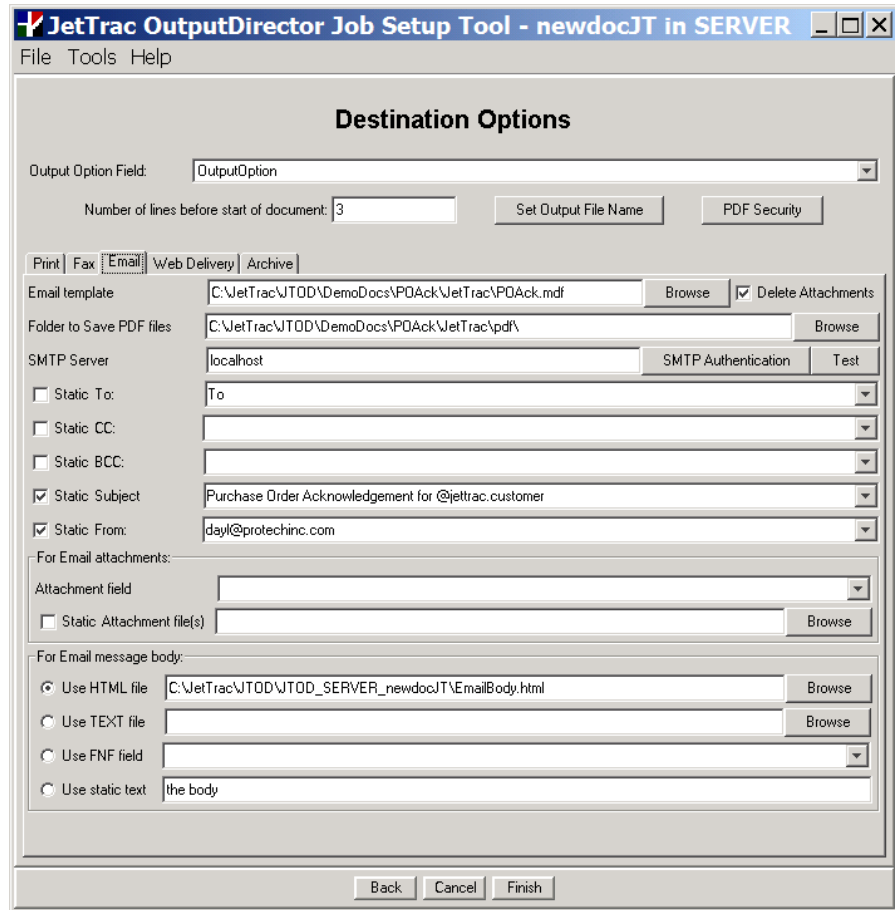
## 5. The Fax Tab

- a. If you chose **No Fax** on the **JMD options** screen or if you did not chose any documents to fax on the **Output Options** screen, skip to the E-mail tab, otherwise browse for the MDF file to be used when faxing documents.
- b. If you selected Fax Server on the JMD Options screen, you must pick a destination for OutputDirector to deliver the files to the fax server. This destination is a printer that must be set up in the Printer Table of the JMD.
- c. If you selected use **Fax Server or MS Fax Integration** on the **JMD Options** screen, the fields in the fax tab must be filled in.
- d. The Fax user ID only applies to the **R-Fax service**.
- e. If you select **MS Fax Integration**, then the only field that is required for is **ToName**. Also, your MDF form template must have the PDF driver compiled into it, as well as a registered PDF reading tool (ie Acrobat or Adobe Reader) installed on the server where Central/OutputDirector run from. There are additional fields for the **MS Fax Integration** available for use in the **MS Fax Setup** dialog off of the **Tools** menu. These fields are not required. They might not all work under Windows XP. Some will only work with Windows 2003 server. For more information of the setup of the Windows Fax subsystem for use with MS Fax Integration, please refer to the document, *Windows Fax setup for MS Fax Integration*.

The screenshot shows the 'JetTrac OutputDirector Job Setup Tool' window. The 'Destination Options' section includes an 'Output Option Field' dropdown set to 'OutputOption', a text box for 'Number of lines before start of document' with the value '3', and buttons for 'Set Output File Name' and 'PDF Security'. Below this is a tabbed interface with 'Fax' selected. The 'FAX Preferences' section contains a 'Fax template' text box with the path 'C:\JetTrac\JTOD\DemoDocs\PDack\JetTrac\PDack.mdf' and a 'Browse' button, and a 'Destination' dropdown menu. The 'MS Fax/R-Fax Service Setup' section lists several fields, each with a checked 'Static' checkbox and a dropdown menu: 'Fax User ID' (userID), 'To Name' (toname), 'To Company' (tocompany), 'To Fax Number' (tofaxno), 'From Name' (fromname), 'From Company' (fromco), 'From Fax Number' (fromfaxno), and 'From Voice Number' (fromvoiceno). At the bottom are 'Back', 'Cancel', and 'Finish' buttons.

## 6. The E-mail tab

- a. If you chose **No E-mail** or **Use Messaging Agent** on the **JMD options** screen or if you have chosen no **Output Options** document keys to E-mail, skip to the **Archive** tab, otherwise browse for the **MDF** file to be used when generating the PDF files that will be attached to the E-mail messages. This would be compiled with the PDF driver available if you picked **Use Central Pro** on



the **JMD** options screen or compiled with a **PCL driver as default** if using one of the **PCL2PDF** choices. This could all be compiled into one **MDF** file.

- b. If you do not want to save your PDF files after they have been sent, check the **Delete Attachments** box.
- c. If you are using dynamic HTML as the body of your E-mail message, browse for the template.
- d. Pick the directory that will be used to store the PDF files before they are E-mailed.
- e. In the **SMTP Server** field type in the address or the SMTP server name. If you need to authenticate to your SMTP server, then click **SMTP Authentication**. You will get this dialog box. Enter your user/password combination and be sure to click **Use Authentication**. If for some reason you need to test without Authentication, but would like to leave your user/password info entered, all you need to do is uncheck **Use Authentication**.



You test it by clicking on **Test** (by click on **Test** you will email your JetTrac Site Code to the email address on the **Welcome** Screen). If successful, you should get a pop up box, click **OK**.

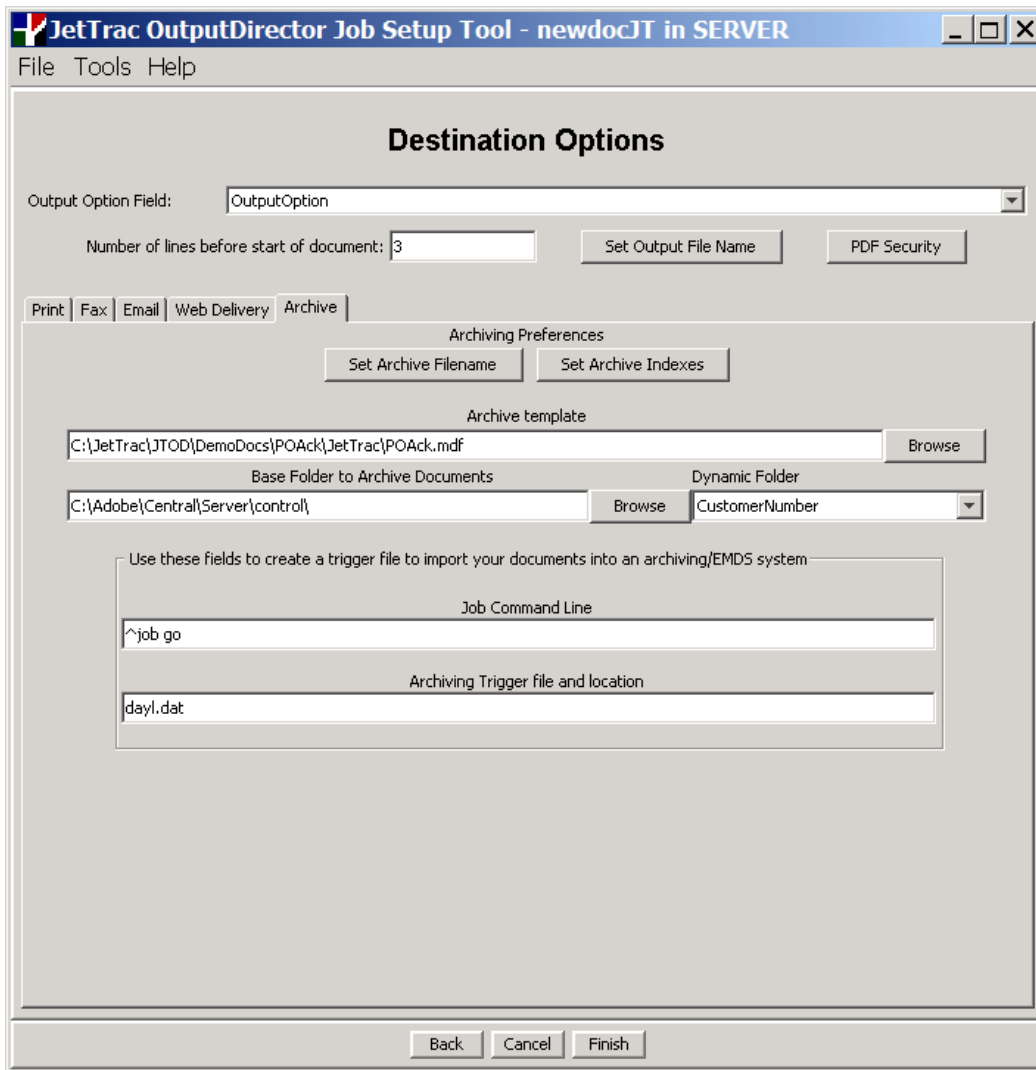
- f. Now fill in the appropriate blanks. If the information is found in a field in your FNF, choose its field name from the drop-down list. If the value for a field is to come from a field in the FNF stream, make sure that **Static** is not checked, then pick the field name from the list. If the value is static, and will not come from a field, then check the **Static** box and enter the information that you want in the blank. You can list multiple To, CC and BCC value by separating them with semicolon. You can also use the name <address> notation for friendly names. **NOTE: values for To Address and From Address are required or no E-mails will be sent.**
- g. For email attachments, in addition to the main document PDF file, you can also attach other documents. They must either be listed in a field in the field-nominated stream, one file per line or they can be named directly by checking the static box and naming the files, one by one, with a semicolon in between each one.
- h. For the **message body** for the E-mail that are sent, you have several options:
  - i. You can use an **HTML file** to have OutputDirector send beautifully formatted E-mails. To do so, check the radio button beside **Use HTML File** and browse for your HTML file. You can use a field value to name a dynamic value with this notation: @fieldname. For instance, c:\jettrac\jettrac.companyname.messagebody.html. If the value of the field companyname was ABCtech, then this would yield the filename:  
c:\jettrac\ABCtechmessagebody.html
  - ii. You can use a **plain-text file**. To do so, check the radio button beside **Use TEXT File** and browse for your TEXT file. You can use a field value to name a dynamic value with this notation: @fieldname. For instance,  
c:\jettrac\jettrac.companyname.messagebody.txt. If the value of the field companyname was ABCtech, then this would yield the filename: c:\jettrac\ABCtechmessagebody.txt
  - iii. You can use what is found in **a field in your FNF** as your message body. It is assumed that you would have previously set up a field in your FNF to be the body and be formatted to make message bodies. To use an FNF field as your body, check the radio button beside **Use FNF field** and select you field from the list.
  - iv. You can use **static text** as your body. To do so, check the radio button beside **Use static text** and type in what you want for the text.
- i. **Automatic FNF field insertion** into E-mails. You can also have FNF field values automatically inserted into the body or the subject of your E-mails by this notation: **@JetTrac.fieldname**, where fieldname is the name of the field in your FNF file. This works no matter what your selection is for message body. You can also use **@fldname.fieldname** or **\$jettrac.fieldname**.
- j. **Be sure you have at least filled out the To: and From: fields. The email will fail without them.**
- k. If you are using the Messaging Agent, none of the fields on this tab apply. You must set up exact field names to use Messaging Agent. Refer to the Messaging Agent documentation for details. You must still enter an email attachment template here on this tab.

## 7. The Web Delivery Tab

The Web Delivery tab is the same setup as the E-mail tab with only a couple of exceptions:

- a. Web Delivery by definition means that E-mails will be sent **without** the document attached. The body of the message in Web Delivery needs to have a **link** to the web address of where to find the document from the web, so that a user receiving the E-mail can click on the link and **retrieve their document via their web browser**. This is preferable for especially large documents, or where standard SMTP does not provide the security you need and can put in place with HTTP. Because you cannot use > or < in the Use static text for message body selection, this would preclude you from entering an HTML hyperlink in the **Use static text** field. It is most likely that you will use either an external **HTML** file or external **TEXT** file for the body of a web delivery. To have OutputDirector automatically insert the filename of the PDF or XLS file it is creating into your message body, use the notation **@JetTrac.cmd1** for the filename. For example, if your document were found on the web at <http://www.jettrac.net/mydocument.pdf>, you would use <http://www.jettrac.net/@JetTrac.cmd1.pdf> in the file you are using for the body of your Web Delivered message.
- b. Because Central cannot write documents directly to the web, Central must be able to see folders shared on the web by another route. This would be a folder shared across the network (with rights), or local to the server where Central, (and OutputDirector), are running. In our above example, the folder where the mydocument.pdf file is written to must be accessible, say through a Windows networking share. So, the server, www.jettrac.net, may also be accessible on your Windows network as \\jettracweb In this case, in the blank next to **Web Server PDF folder**, you would browse for the folder on the server \\jettracweb **that corresponds to the same folder** on www.jettrac.net. That way, Central places the file in a standard Windows directory, but the person receiving the E-mail notification can still retrieve their document via Internet Explorer and the web server interface. This would also work in UNIX across NFS mounts in the file system.
- c. Web Delivery is not supported with the Messaging Agent.

## 8. The Archive Tab



- If you chose **No Archiving** on the **JMD options** screen, click **Set Archive Filename**, otherwise, skip to **The Finish Button**.
- Create the name of your archive files in the same way as was mentioned earlier for **Set Output File Name**. Be careful to name the archive files something that includes a field that will have a unique value in every document, otherwise it will group documents together, because the filenames for those documents would have come out to be the same name.
- If you picked an archive output other than **Just create Image files** on the **JMD Options** screen, then you will need to set up the indexes for that system. Click the **Set Archive indexes** button. Follow the instructions provided to you by your EDMS vendor for specific information on how to create the indexes inside of Output Director.
- Browse for the MDF file to be used when generating the image files that will be archived. This would be compiled with the PDF driver available if you picked **Use Central Pro** on the JMD options screen or compiled with a **PCL driver as default** if using one of the **PCL2PDF's or TIFF's**. This could be compiled into the same MDF file.
- Pick the directory that will be used to archive the image files, or the directory that the document management system will pick them up in. If you would like image files to be placed in dynamic folders, then use the **Base Folder** to set the prefix, then use the **Dynamic Folder** drop-down to select the name of the field that contains the name of the folder to

archive documents in. As this field value changes, the image files will be put in the current folder name. OutputDirector will create these folders for you dynamically.

- f. OutputDirector provides smooth integration for indexing documents into the supported EDMS systems on a document-by-document basis. However, if you would like to have a batch of documents queue up, then run one indexing program at the end of the batch, you can use the trigger file to do so. If you fill in the last two fields on the Archive tab, you can create a file that will be placed in the collector directory for processing after all of the other image files are produced. Then with the job card you create here, you can launch any manually created job in Central that you want to run your batch indexing tool. You would have to create your own job manually in the JMD to do so. Refer to the Central documentation on how to do this or ask your support representative.

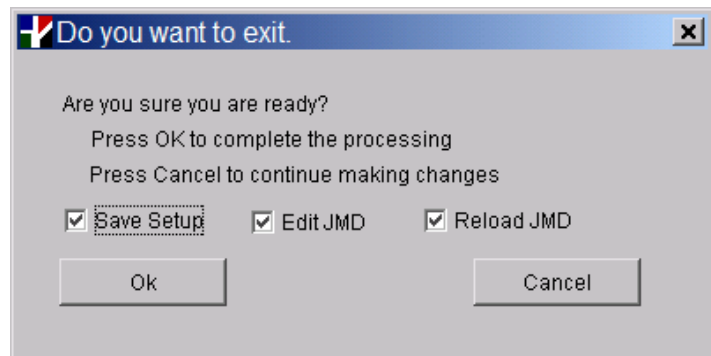
## 4.7 The Finish Button

When you click the **Finish** button, this window pops up. It has three check boxes and two buttons. You can select any combination of the three boxes that you want. The options are:

**Save Setup** – saves all JTOD setup files.

**Edit JMD** – Update the Job Management Database.

**Reload JMD** – sends a Reload JMD command to Central to implement the changes just made to the JMD.



Click **OK** to implement the desired combination of selections. Output Director Setup will configure the production pieces of itself and Central and tell you when it is done.

## 4.8 Explanation of File Menu

There are many different options that you can set in OutputDirector in order to automatically build all the information in the Job Management Database in order to do production processing. Here is an explanation of the options:

### **Save Setup Files:**

This allows you to make quick changes without having to go through the whole process again. You can go to the Destination Screen, make the changes, save the ini files, and exit.

### **Update JMD:**

This allows you to update the JMD without having to go through the whole process again. You can make changes to any task or job within OutputDirector, save them to the JMD.

### **Reload JMD:**

This allows you to reload the JMD without having to open Control and reload it there. Once you have updated the JMD, just click on Reload JMD, and exit.

### **Print Agent Options:**

This allows you to add the print agent options and/or preamble files without having to go into the JMD. Just type in the appropriate options and click **OK**. These are unique per job. If you select Central Pro as your JMD option to create output files, Print Agent Options will not be valid. Likewise, this Print Agent Options field does not affect the multiple print lines.

## 4.9 Explanation of the Tools Menu

### **Show Vars**

For technical troubleshooting purposes, the current value of all variables is displayed.

### **Submit Site Code:**

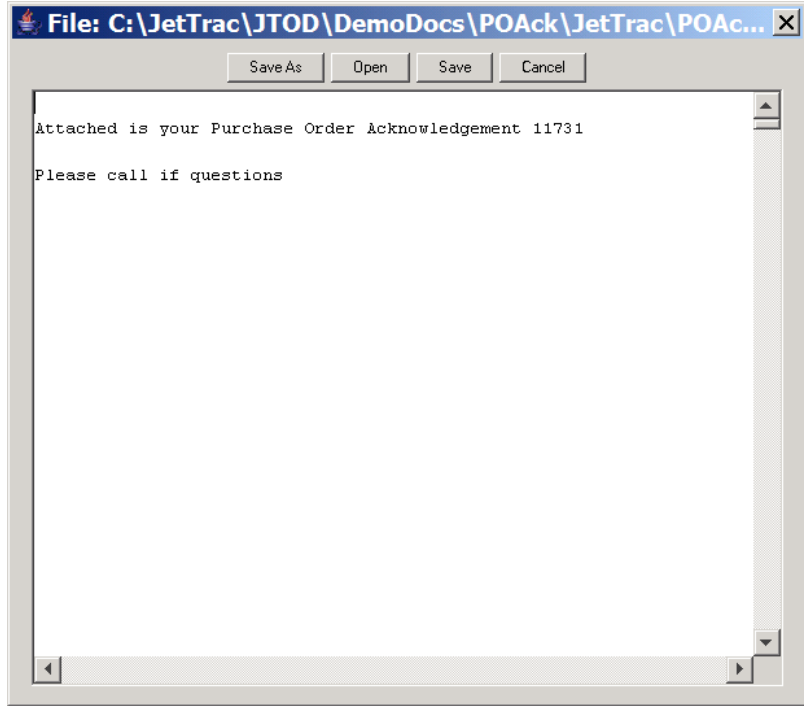
This allows you to generate a Site Code, and then automatically send it to Pro Technology. Once Pro Technology has received it, then they will create and send the license files to you. The license files allow you to use the JetTrac products incorporated within OutputDirector and with Central.

### **Test Bench:**

Test Bench allows you to do a few trial tests of your jobs to get a preview of how things will go in you production setup inside of Central. See the JetTrac OutputDirector Technical Document for more information.

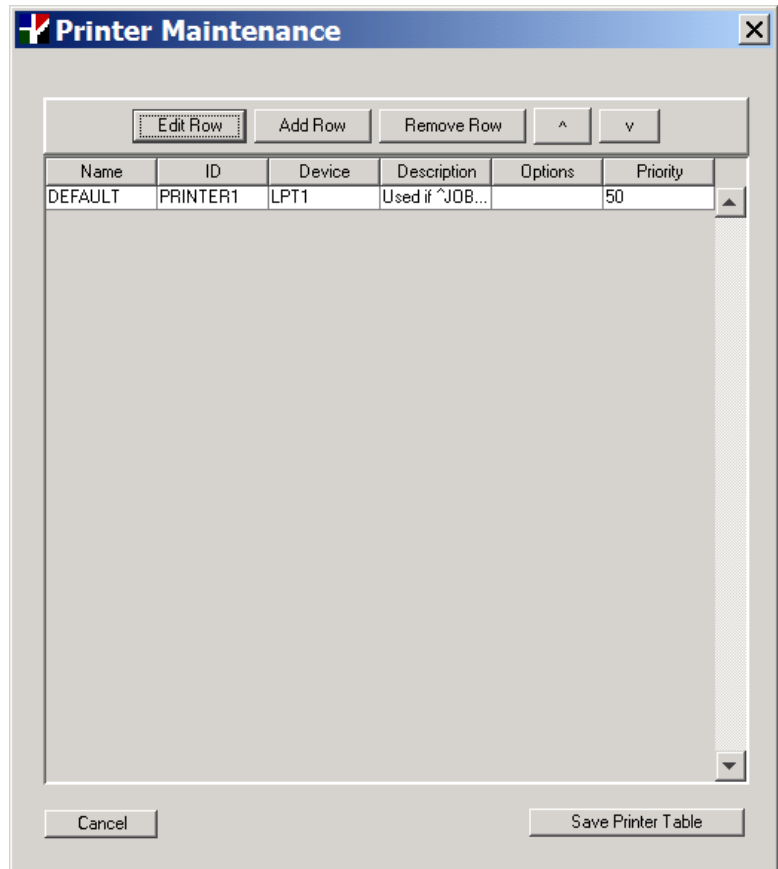
**Edit/Create File:**

Opens up a simple text file editor. Useful for creating E-mail body files.



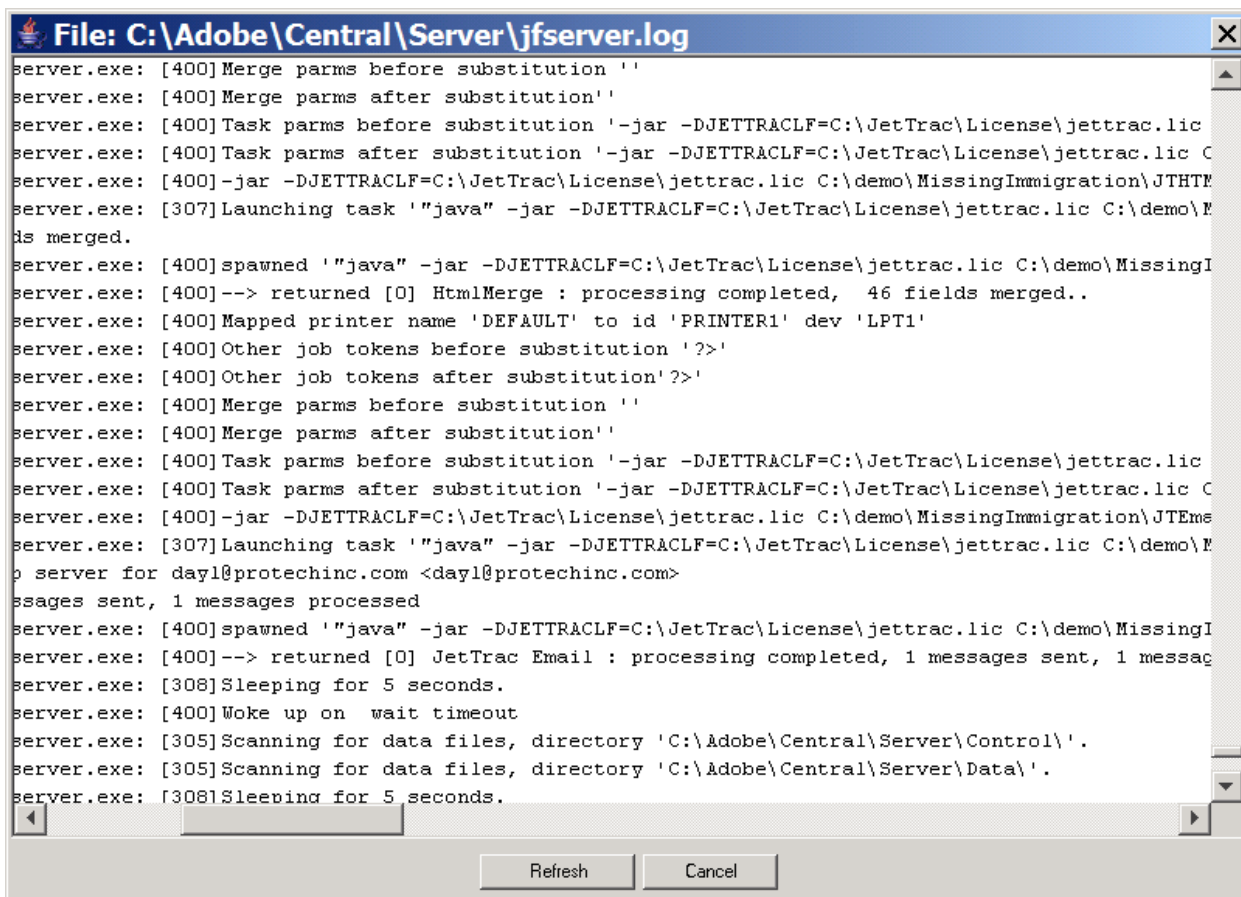
**Manage Printers:**

Brings up the Printer Maintenance Dialog. This allows adding, removing, or editing the Printer Table in your currently active JMD. Refer to Adobe documentation on exactly how why and when printers need to be created in the Printer Table.



## View Central Log:

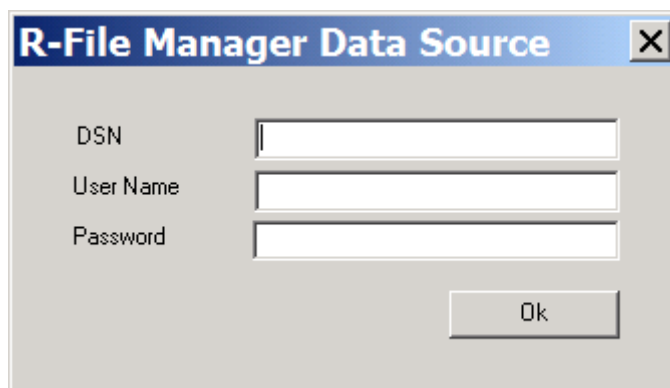
Opens up the Log file for Central for viewing and copying.



## 4.10 Explanation of the Advanced Setup Menu

### R-File Manager Data Source:

Sets up the username, password and DSN for R-File Manager. For more info, refer to the R-File Manager documentation.



### DBConnect Setup:

Brings up the DBConfig dialog on properly configured systems. This allows you to use JetTrac DBConnect to access live databases in your system. Ask ProTechnology for more information on how this is done:

### MS Fax Additional Setup:

This brings up the MS Fax Setup dialog box. This dialog is used in conjunction with the fields on the Fax tab of the Destination Options screen to construct the MS Fax information file. The fields in this dialog are changed less often than the fields on the Fax tab.

Control Directory	1
Fax Server	2
Office Location	3
Department	4
Title	5
Home Phone	6
Email	7
Billing Code	8
Street Address	9
City	10
State	11
ZipCode	12
Country	13
TSID	14
Body	15
Document Name	16
Priority	17
Schedule Type	18
Schedule Time	19
Cover Page Type	20
Cover Page	21
Receipt Address	22
Receipt Type	23
Attach Fax To Receipt	

Ok

### FTP Setup

If you selected Create & FTP Image files, you need to set up the server information for the FTP server. OutputDirector needs to know five pieces of information:

- The address of the FTP server to contact.
- The username with rights.
- The Password for that user.
- The folder to save the image files in.

Whether or not you like the image files to remain on your local Central/OutputDirector server, or you'd like them purged from the local machine after they are successfully uploaded.

FTP Server: archive.edms.com

Username: redstar

Password: \*\*\*\*\*

Folder: ./

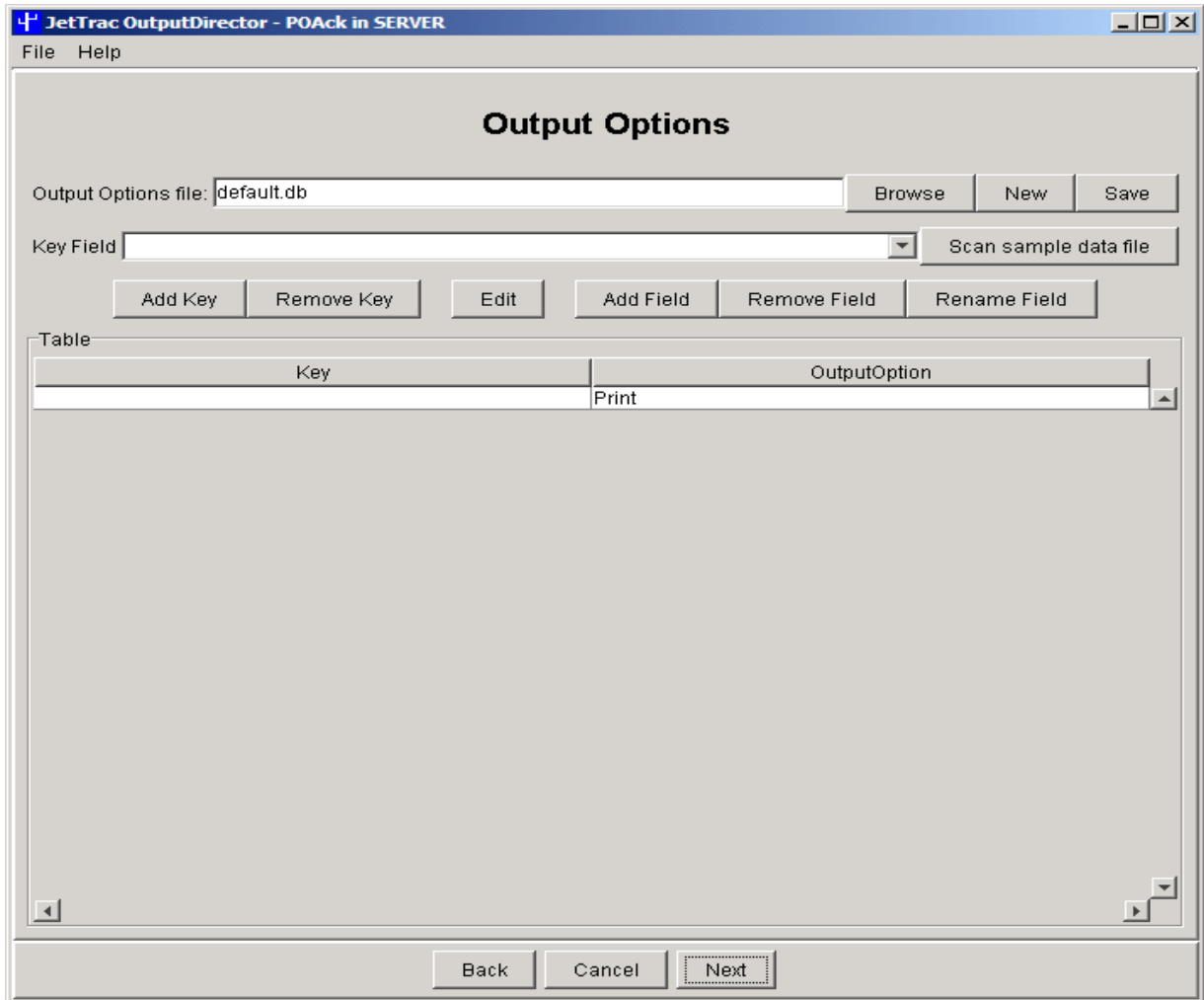
Delete Local File(s)

Ok

## Multi-Email Setup

Multi-Email Config will let you setup extra emails. For each document that is tagged with the option to email, you can actually send up to five different documents to five different email destinations. For each data stream, you can pick a different MDF form template and a completely different set of email options, up to five times. For any of the copies to work, you must check the **Enable this email copy** box at the top of the tab. Other than that, the setup is identical to the setup on the mail email tab on the **Destination Options** screen.

## Lookup Setup



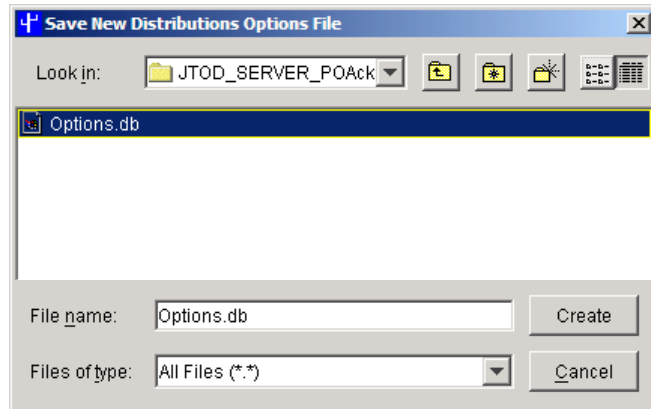
1. In the **Output Options file** field, **browse** for your Output Options file, or click **New** and create one.
2. From the drop down list, pick the your **Key Field**. A key is the basis or the key for a lookup. Based on the value of what is in your key field, OutputDirector will associate certain information, like fax number, e-mail address, or whatever. For our purposes, we will usually use vendor number or customer number as the key field.
3. We will then use this table to associate the options for each vendor, for instance. Your table might look like this:

<b>Key – Vendor Number</b>	<b>Output Option</b>	<b>EmailAddress</b>	<b>FaxNumber</b>
<i>11294</i>	<i>Email</i>	<i>dotj@aol.com</i>	
<i>11287</i>	<i>Fax</i>		<i>415-334-2245</i>

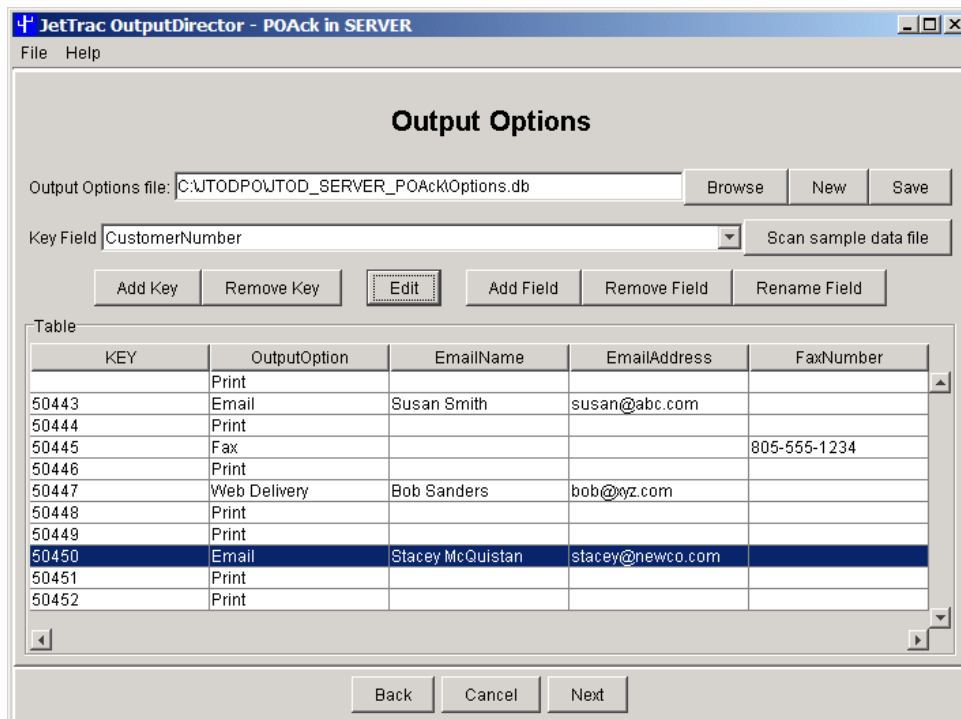
In this example, all documents for vendor # 11294 will be emailed to dotj@aol.com and all documents for vendor # 11287 will be faxed to 415-334-2245. You might have different vendor or customer numbers

**How to create a Output Options file.**

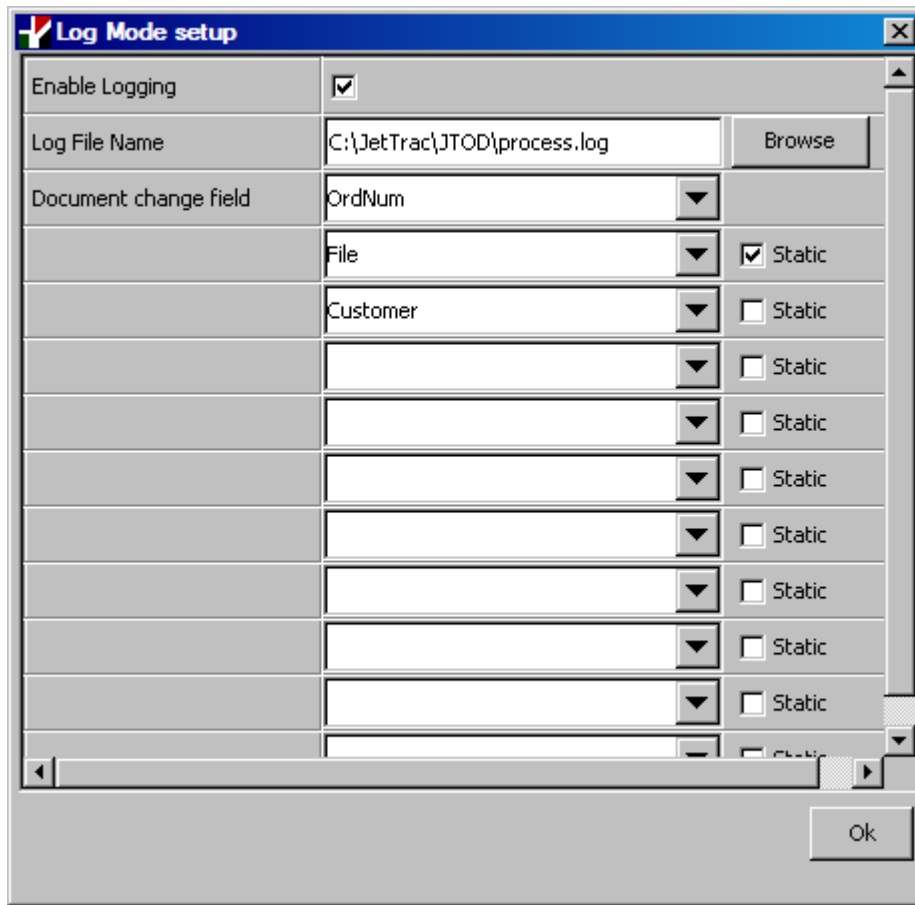
1. First click on **New** and a screen like this should come up.
2. Type in the name you want it to have and put the extension **.db** at the end, then click **Create**.
3. You should get a new table with 2 columns and 1 row.
4. If you want to add a new field, just click on **Add Field**, and a new column will appear.
5. To change the name of the field click on the cell below the field name, and click on **Rename Field**, then type in the new field name and click on **OK**.
6. To remove a field click on the cell below the field name, and click on **Remove Field**.
7. To add more Key Fields, just click on **Add Key**, type in the value for the Key, pick the **Output Option** from the drop down list, and enter any other information under the new fields that were created.
8. If you want to remove a **Key** or row, click on a cell in that row and click on **Remove Key**.
9. If you need to edit an existing **Key** or row or the field values in it, just click on any cell in that row and click on **Edit**.



The table may look like the one below. When you have completed the **Distribution Options** table click on **Save**, then click **Next**.



## Logging Setup



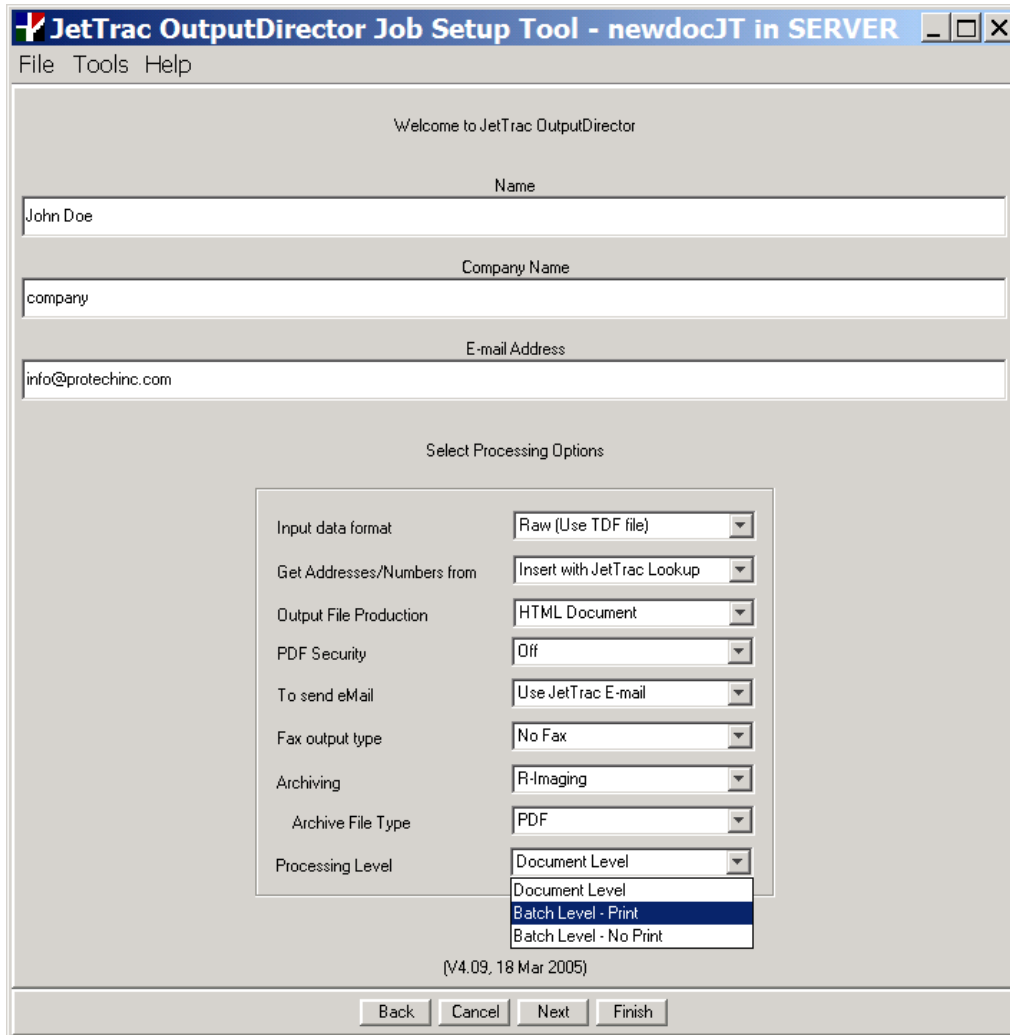
Logging allows you to keep a log of all of the documents that OutputDirector processes, including the information you specify for each document. This always produces the format of one line per document, with each value separated by a pipe “|” character.

1. Check **Enable Logging**
2. **Browse** for and select the name of the log file you want.
3. Select what will be logged for each document. You get 10 places to put either a static value or the value of a field from the document. To select a field value, leave **Static** unchecked and select a value for the log from the field list drop-down box.

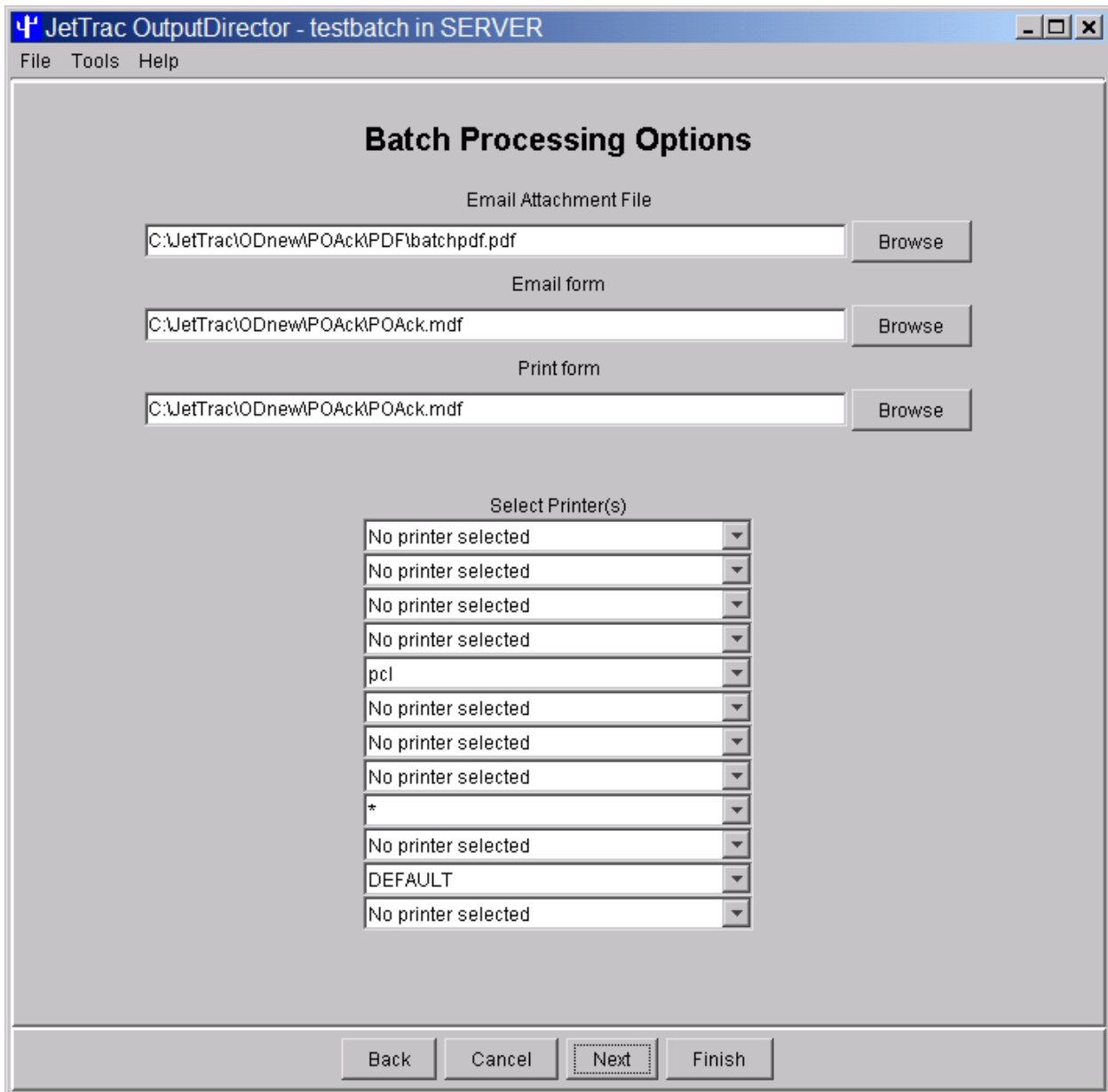
## 4.11 Batch Processing Levels

JetTrac OutputDirector is designed to handle two different types of processing. The first is Document Level Processing where a batch is split apart to individual documents for distribution by document via print, fax, email, web delivery and archiving. The second is Batch Level processing where a batch is not split apart but is processed as a complete batch to print (could be multiple printers), fax, email, web delivery, archiving or any combination.

1. On the **Options Screen**, click on the drop down list for **Processing Level** and choose **Batch Level – Print**, if you are going to do batch processing with or without emailing.



2. Then the **Batch Processing Options** screen will come up after the **Basic Information** screen.
3. You would then choose the set of printers that you want to use for batch printing.
4. If you are emailing then browse for, or type in the name of the PDF attachment that you want to use in your email.



### Batch Level Processing – No Print

If you wish to email only and not print then choose this option. Ignore the Select Printers part of the Batch Processing Options screen. Fill out the Email screen as shown below to set up the options needed to email the document.