Output Manager Administration Guide
Version 4.0 SP2

Output Manager Administration Guide

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Getting Started

Welcome to Output Manager

Welcome to the User Guide for Output Manager. This guide contains the task descriptions and reference documentation that describes how to use Output Manager to manage an organization's output operations.

Output Manager gives organizations control of what, when, and how they produce and deliver information. Output Manager is designed to route documents through a centralized system. This provides significant benefits over unmanaged systems in which documents travel directly between origin and destination.

Product Features

Output Manager contains the following core features:

- Maximizes the number of sources from which you can receive documents.
- Provides unrivaled control over documents.
- Manages many different document destinations.
- Ensures security and integrity of documents during the entire send and receive cycle.
- Produces a completely integrated audit trail.
- Provides accounting functionality to monitor and control costs.
- Supplies tools to convert document formats for particular destinations.
- Allows administrators, operators, end users and management to view and monitor processes.

Output Manager supports a wide variety of sources for receiving documents. However, regardless the source application, Output Manager maps document information, such author, header, or job ticket, and maps it to Output Manager document properties. This enables a workflow to route documents based on specific job information. You will find that Output Manager's many options allows users to connect seamlessly to your systems and receive files no matter where they originate.

Getting Started

Follow these high-level steps for a basic Nuance Output Manager implementation. The steps for your implementation may vary.

1. Perform initial administrative setup

- *Manage Nuance Output Manager security roles*
- *Configure Nuance Output Manager Console security*
- *Detect printers*
- *Manage SNMP devices*
- *Customize the grid views*

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2. Define a source to receive documents into Output Manager

- *How to add an AutoStore source* on page 83
- *Receive documents from an email address*
- *Receive documents from an FTP connection*
- *Receive documents from an LPD connection*
- *How to add a Mobile Server source* on page 104
- *How to add a NetWeaver source* on page 108
- *Receive documents from a network folder*
- *Receive documents from another Nuance Output Manager*
- *Receive documents from a socket connection*
- *How to add a TCP/IP NJE source* on page 122
- *How to add a WCF API source* on page 126
- *How to add a Web Upload source* on page 130
- *Receive messages from WebSphere MQ*
- *Receive documents from a Windows queue*

3. Define a destination to send documents from Nuance Output Manager

- *Sending Documents to AutoStore* on page 161
- *Send documents to an email address*
- *Sending Documents to a Fiery Device* on page 165
- *Send documents to an FTP server*
- *Send documents to an IPDS printer (not available for new sales)*
- *Send documents to an IPP destination*
- *Sending Documents to JDF/JMF* on page 176
- *Send documents to an LPR server*
- *Send documents to a network folder*
- *Route documents to another Nuance Output Manager*
- *Sending Documents to a PRISMAProduction Destination* on page 187
- *Sending Documents to a SharePoint Site* on page 189
- *Send documents to a socket*
- *Send documents to a WebSphere MQ*
- *Send documents to a Windows queue*

4. Route documents to a destination

- *Manually route documents from the Nuance Output Manager Console*
- *Automatically route documents using business rules*

Output Manager Concepts

Nuance Output Manager is a complex application with numerous features targeted at increased efficiency in managing output. This section covers the core concepts of the system.

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Sources

Documents are received into Nuance Output Manager via sources. These sources can be created, configured, and monitored by administrators using the Output Manager Console. Sources can be organized into source groups, which allow for easier monitoring from the Output Manager Console. The following table lists the source types supported by Nuance Output Manager.

Table 1: Source types

AutoStore	Output Manager servers
Email	Socket
FTP	TCP/IP NJE
IPP	WCF API
LPD	Web Upload
Mobile Server	WebSphere MQ
NetWeaver	Windows queue
Network folders	

Destinations

Documents are sent from Nuance Output Manager to destinations. These can be printers or other devices, as shown in the following table. Destinations can be created, configured, and monitored by administrators using the Output Manager Console.

Destinations can be organized into destination groups, which allow for easier monitoring from the Output Manager Console. These destination groups also play an important role in configuring functions such as failover printing, load balancing, and print splitting.

Table 2: Destination types

AutoStore	Network folders
Email	Output Manager servers
Fiery Device	PRISMAProduction
FTP	SharePoint
IPDS (not available for new sales)	Socket
IPP	WebSphere MQ
JDF/JMF	Windows queues
LPR	

Printer families

The concept of printer families is used in Nuance Output Manager to configure commands for print languages and map them to destinations based on their capabilities.

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SNMP devices	Modern printers can provide information about their status and capabilities via SNMP. Nuance Output Manager uses SNMP to both discover and monitor printers. Once discovered, administrators can create destinations associated with these physical devices.

Documents

The main purpose of Nuance Output Manager is to manage the flow of documents. The concept of the document is therefore present in virtually all areas of the product.

Document properties	Every document in Nuance Output Manager has metadata associated with it. This can range from obvious items like document name and type, to finishing options like stapling and binding. All of these are called document properties. Some of the properties are editable, while others are shown only for informational and reporting purposes. When setting up Nuance Output Manager, administrators configure which document properties are active, their display names, and their default initial values.
Active documents	Documents coming into Nuance Output Manager are considered Active, until they are either printed or deleted.
Retained documents	Once a document is printed or deleted, it is retained. Retained documents can be easily restored to the Active status from one of Nuance Output Manager's various user interfaces. There are global and document specific settings that govern whether a document is retained or not.
Document library	This destination is intended for long-term document storage and web presentation purposes. The Library application is similar to the Documents application because it has a folder structure that you can modify for better organization and queries for finding documents. The documents are put in the library folder when they are routed to the Document Library destination.
Document folders	Documents can be organized into document folders. These folders govern the security rights that users and user groups have over documents.
Document queries	Document queries are used to quickly locate documents based on their properties. Queries can be run ad hoc or saved for future use.
Routing of documents	There are three ways to route documents from a source to a destination: • Include a default destination in the source configuration. • Create a business rule to route to a destination.

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	• Manually route the document from one of Nuance Output Manager's user interfaces.
Document transformations	Nuance Output Manager supports a variety of document types, such as PCL, PS, PDF, Text, TIFF, JPG, PGN, AFP, IPDS (not available for new sales), LCDS, and so on. The system also supports transforming documents between these print description languages (PDL).
Document re-engineering	There are times when customers want to add or remove information from documents without making changes to the application that generates the document. Examples include adding barcodes, OMR marks, logos, and so on. Similarly, bundling and splitting of documents is sometimes desired. Nuance Output Manager includes broad support for all these actions.
Package	Nuance Output Manager uses a package to describe a collection of documents. In most cases, there is only one document in a package. You can think of packages as documents. Packages are used to group multiple documents together to be sent to a destination as a single unit. A package can be created or modified using Business or Ad Hoc Rules. You can select documents that you want to add or remove from packages by selecting **Package Manager** from the document context menu.

Output processes

Nuance Output Manager includes the powerful concept of output processes. These processes can be associated with either destinations or documents. They represent a predefined set of actions which would impact a document as it is being sent to a destination. Examples include search and replace, setting finishing options, and inserting overlays.

The output Process Designer is a utility included in the Output Manager Console that is used by administrators to design Output Processes. The visual flowchart style designer makes it easy and intuitive to create complex, powerful processes.

File stores

Nuance Output Manager's architecture includes a database which only stores document properties. The actual files are stored in network folders, called file stores. Administrators can define multiple file stores, and configure which documents go into which file stores.

Security

Security control is a central component of Nuance Output Manager. Granular rights can be assigned to users and user groups for every major area of the system: destinations, sources, documents, administration, and user interfaces. These rights control both visibility and which actions can be performed. The use of inheritance throughout the product greatly simplifies the process of setting up security.

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Failover profiles

In an ideal world, destinations are always ready to receive documents. In the real world, at times printers or other devices are inaccessible. Nuance Output Manager includes failover profiles, which allow administrators to specify what should happen to documents in such cases. Included in the failover profiles is the ability to pick alternate destinations where the documents can be routed.

Business rules

Nuance Output Manager is designed to operate unattended. It is a system geared towards automation of document processes. Business rules represent the main interface for managing and configuring these automatic processes. Administrators can create rules which include conditions and actions. Conditions have to be true in order for the rule to affect the document. Actions impact documents in a variety of ways. Examples include routing to destinations, transforming to other print languages, assigning to document folders, editing document properties, and so on.

Ad Hoc Rules

Ad Hoc Rules are run on user-selected documents that already exist in Nuance Output Manager. You can manually initiate the rules or you can schedule them to run periodically using the **Schedule Manager**. Examples of ad hoc actions that may be in an ad hoc rule include create a package of documents, merge documents in to a package, set document states, and assign documents to a document folder.

Alert rules

Alert rules allow administrators to configure advanced alert options for when certain events happen. This is particularly useful for monitoring printer states. Through alert rules, support personnel can be proactively informed when printers have conditions that could prevent end user printing.

Billing accounts

Nuance Output Manager offers complete flexibility in configuring billing accounts. These accounts can be associated with documents. The association can occur automatically based on document properties, or manually based on input from users. Reports can then present a complete picture of total print output by billing account.

Costing

Nuance Output Manager sources and destinations can have per page costs associated with them. A cost can be assigned to every document coming in and going out of Nuance Output Manager. This cost can be based on basic document properties such as color versus black and white, or more advanced properties such as media type and finishing options.

Quota management profiles

Reporting, costing, and billing accounts can provide a complete picture of printing costs. Quota management profiles are used to take this one step further and actually modify user behavior. These profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

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User balances

In addition to quota management profiles, users can be assigned balances. For example, all users in a particular department could be assigned a $50 print allowance for the month. Once reached, any print from the respective users is disallowed. Administrators have full control over setting up balance amounts and refresh periods.

Messages

Nuance Output Manager posts messages whenever an event takes place. These messages are viewable using the Message Console included in the Output Manager Console. Administrators can monitor messages in order to ensure trouble free operation of the system.

Output Manager User Interfaces

Nuance Output Manager user interface components enable users to administer and interact with an Nuance Output Manager server.

There are several user interfaces that administrators, operators, and end users can use to interact with Nuance Output Manager. These user interfaces vary in terms of platforms they can be run on, richness of features, and footprint.

Output Manager Console

The Nuance Output Manager Console is the main user interface for Nuance Output Manager. Designed in C#, it can be installed on any machine running Windows 7, Windows XP, Windows 2003 Server, Windows Vista, or Windows 2008 Server. Multiple Nuance Output Manager Consoles can connect to the same DBM Service simultaneously.

The Nuance Output Manager Console is the most feature rich Nuance Output Manager user interface. It can be used by administrators to configure the product, operators to manage destinations and documents, and end users to access active, retained, and archived documents. Granular security controls allow for varied access to features, depending on the identity of the logged in user.

Nuance Output Manager Web Interface

The Nuance Output Manager Web Interface can be accessed from any web browser, regardless of the operating system of the machine. This user interface is targeted towards operators and end users, so it lacks the administrative features of the Nuance Output Manager Console.

The functionality available in the Nuance Output Manager Web Interface includes:

- Displaying the list of active and retained documents.
- Downloading and viewing the contents of documents.
- Routing documents to destinations.
- Changing the state of documents.
- Reprinting documents.

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Nuance Output Manager Desktop Client

The Nuance Output Manager Desktop Client is designed for Microsoft Windows workstations in typical office print environments. It is a small footprint software package that you can deploy using any desktop deployment application. Running as a tray application, the Nuance Output Manager Desktop Client allows Nuance Output Manager to provide information to the user and receive data from the user. It can provide users with status messages about the documents they submit, and allow users to view and change document properties. It can also prompt users for cost, billing account, and other information about the their documents. The Nuance Output Manager Desktop Client can also monitor local printing by users, such as documents going to USB and parallel port printers, as well as direct IP printing.

Nuance Output Manager Embedded Interfaces

In addition to the user interfaces running on PC platforms, Nuance Output Manager also supports user interfaces embedded in certain printer models. These embedded user interfaces allow users who walk up to the printers to see the list of their documents in Nuance Output Manager. Documents can then be released for printing or reprinting from the printer.

Instances of Output Manager

The Output Manager Console can simultaneously connect to multiple instances of Output Manager, which allows users to quickly switch between instances. Output Manager can be configured to transfer documents and metadata between instances.

Output Manager services

The Output Manager services provide functionality, interfaces, and data access for an Output Manager system.

Nuance Output Manager is based on the Microsoft .NET Framework. Microsoft Windows services are the backbone of the system. They can be hosted on physical or virtual machines running Microsoft Windows operating systems. For large implementations of Nuance Output Manager, it is a best practice to install the services on machines running server operating systems. Throughout this guide, any machine that has at least one Nuance Output Manager service installed is called an Output Manager server.

Output Manager server runs the services described in the following table:

Service	Description
Output Manager DBM Service	The DBM (database manager) service is the central point for communication with the Output Manager Database.
Output Manager Input Service	The Input Service is responsible for receiving documents into Output Manager.

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Service	Description
Output Manager Output Service	The Output Service is responsible for sending documents from Output Manager to destinations.
Output Manager SNMP Service	The SNMP Service detects printers on the network and c ontinuously monitors printer status using SNMP.
Output Manager Rules Agent Service	The Rules Agent service acts as an agent for the rules en gine that is integrated in the DBM Service.

The *Output Manager Installation Guide* provides more information on Output Manager server services.

Output Manager applications

Related functionality, objects, and settings are grouped and managed using applications in Output Manager.

Application	Description
Destinations application	The **Destinations** application is used to manage and monitor destinations. Destinations provide the methods to send documents to devices, printers or other locations.
Sources application	The **Sources** application is used to manage and monitor sources. Sources provide the methods to receive documents into the Output Manager system.
Documents application	The **Documents** application is used to manage the flow of documents in Output Manager.
Library application	The **Library** application allows for long-term storage of documents that have been received into Output Manager.
Reports Application on page 24	The **Reports** application provides summary and details of activity by user, department, document, and destination.
Devices Application on page 24	The **Devices** application is used to manage and monitor devices used by Nuance Output Manager. Devices represent the physical printing hardware.
Administration application	The Administration application is used to configure administrative options in Output Manager.

Destinations application

The **Destinations** application is used to manage and monitor destinations. Destinations provide the methods to send documents to devices, printers or other locations.

The **Destinations** application is opened by clicking the **Destinations** button in the **Output Manager** console. Output processes can be configured to modify the print stream as a document is sent to a destination. Destination types include the following:

- Document Library
- Email

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- FTP
- IPDS (not available for new sales)
- IPP
- JDF/JMF
- LPR
- Network folder
- NetWeaver
- Output Manager server
- PRISMAProduction
- SharePoint
- Socket
- WebSphere MQ
- Windows print queue

Sources application

The **Sources** application is used to manage and monitor sources. Sources provide the methods to receive documents into the Output Manager system.

The **Sources** application is opened by clicking the **Sources** button in the **Output Manager** console. Document properties and metadata are collected by sources depending on the source type and document type. Source types include:

- AutoStore
- Email
- Epic
- FTP
- IPP
- LPD
- Mobile Server (Nuance AutoStore)
- NetWeaver
- Network Folder
- OM (Output Manager server)
- Socket
- TCP/IP NJE
- WCF API
- Web Upload
- WebSphere MQ
- Windows Queue (print queue)

Documents application

The **Documents** application is used to manage the flow of documents in Output Manager.

The **Documents** application is opened by clicking the **Documents** button in the navigation pane of the **Output Manager** console. The **Documents** application displays a configurable **Documents** tree showing document folders and saved document queries. You can add document folders to the tree for organizing documents. Under the Document Queries folder, you can create queries for quickly locating documents based on their properties. You can add query folders for organizing queries. You can drag-and-drop document folders, query folders, and queries to reorganize objects on the tree.

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Library application

The **Library** application allows for long-term storage of documents that have been received into Output Manager.

Based on user permissions, library documents can be viewed, reprinted, and so on. Documents are placed in the **Library** by sending them to the Output Manager Document Library destination. This destination is a default destination that is created when Output Manager is installed on a server. Documents are assigned to library folders in a dynamic manner using a library filing profile. The filing profile can be assigned by the Output Manager Document Library destination or using business rules.

Reports Application

The **Reports** application provides summary and details of activity by user, department, document, and destination.

The **Reports** application is opened by clicking the **Reports** button in the Nuance Output Manager console. Nuance Output Manager is installed with many sample reports already defined. You can use the Report Designer to create new reports. You can configure report folders for restricted access for users and groups.

Devices Application

The **Devices** application is used to manage and monitor devices used by Nuance Output Manager. Devices represent the physical printing hardware.

The **Devices** application is opened by clicking the **Devices** button in the Nuance Output Manager console. Devices can be configured into device groups for ease of display and controlling access by users and user groups.

Administration application

The Administration application is used to configure administrative options in Output Manager.

The **Administration** application is opened by clicking the **Administration** button in the navigation pane of the **Output Manager** console. Options may be configured in the following categories:

- Columns
- Document properties
- Billing accounts
- Licenses
- Product components
- SNMP
- Users
- Windows queues
- General preferences

Learning About the Output Manager Console

The Output Manager Console is the main window for Nuance Output Manager. It is primarily used to manage the flow of documents in Nuance Output Manager. Access is available to all active, retained, and archived documents. You can also manage and monitor sources (how documents are received into Nuance Output Manager) and destinations (where documents can be sent). Administrators can use the Output Manager Console to configure administrative settings such as permissions, billings accounts, and default display settings. Granular security controls allow for varied access to features, depending on the permissions assigned to the logged in user.

This topic is intended to help you learn more about the features of the Output Manager Console window. Descriptions are provided for all of the menu bar and status bar options.

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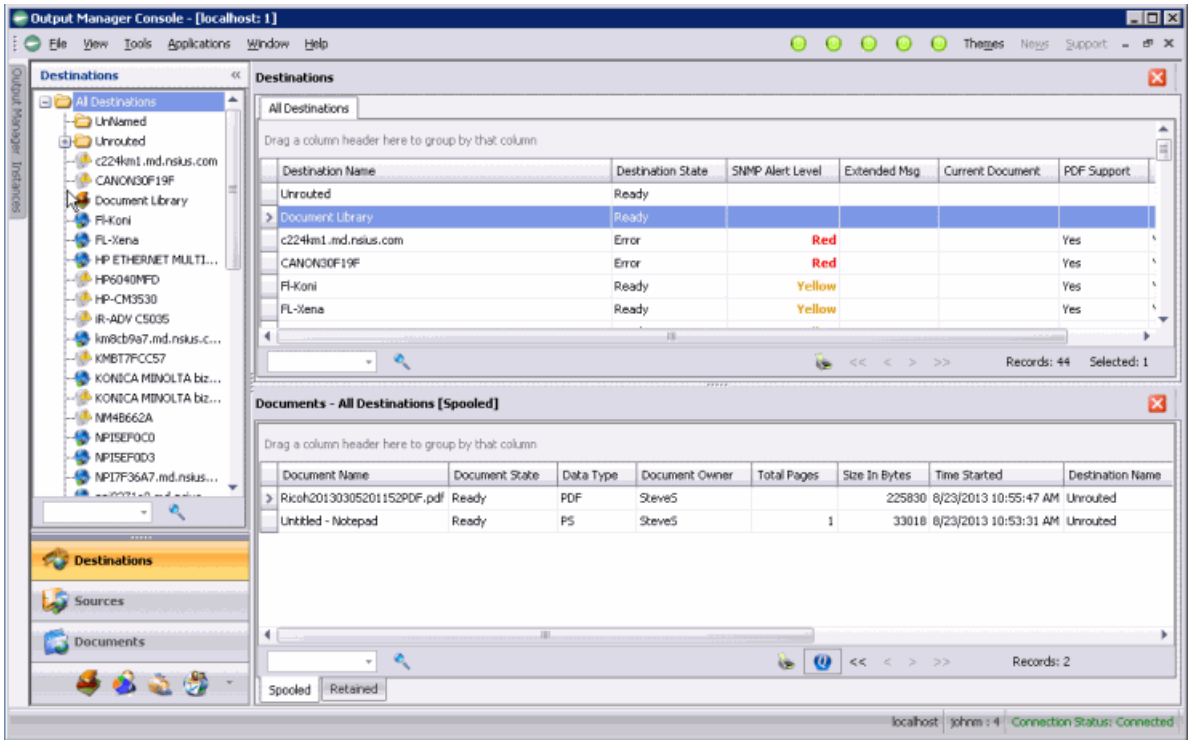
Click the area of the window you want to learn more about.



1. *Menu bar* on page 25
2. *Status bar* on page 31
3. *Application window* on page 30
4. *Service status lights* on page 30

Menu bar

The menu bar displays below the title bar.

Menu	Command	Description
File	**New**	• **Window** — Opens the current Nuance Output Manager connection in a new window. This window will open inside the current Output Manager Console. The title bar of the first window will be **DBM server name 1**. Each successive window opened will be numbered accordingly. For example, you could use the first window for the Source application and the second for the Destination application.

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Menu	Command	Description
		Note: When multiple console windows are opened within a single Output Manager Console, all windows are connected to the same Output Manager DBM Service using the same user name. To have an Output Manager Console with a different user name you must open another Output Manager Console. • **Connection** — Displays the **Connect to OM Server** dialog box for starting a new Nuance Output Manager connection. Your existing connections will remain connected.
	Close	Closes any of the open connections. Choose the number that corresponds with the connection you want to clos e.
	Exit	Closes the Output Manager Console. **Note:** Nuance Output Manager continues to operate in the background after you exit the Output Manager Console. To stop Nuance Output Manager operation, you must stop the Nuance Output Manager services. Make sure to stop the Output Manager DBM Service last.
View	**Dest - Sources Window**	Shows or hides the **Destinations** or **Sources** pane, depending on the activ e application.
	Documents	Shows or hides the Documents wind ow.
	OM Instances	Displays the **Output Manager Instance** panel, in which you can cho ose an instance to manage.

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Menu	Command	Description
Tools	**Ad Hoc Rules**	Allows administrators to create an d manage merging and packaging actions. Displays the **Alert Rules Manager** dialog box.
	Alert Rules	Allows administrators to configure advanced alert options for when ce rtain events happen. This is particul arly useful for monitoring destinati on states. Displays the **Alert Rules Manager** dialog box.
	Business Rules	Allows administrators to configure a utomated document processes. They can create rules with conditions and a ctions that affect documents. Examp les include routing to destinations, tr ansforming to other print languages, assigning to document folders, and e diting document properties. Display s the **Business Rules Manager** dialo g box.
	Device Wizard	Allows administrators to convert W indows queues to Nuance Output Manager sources, detect devices usin g SNMP, and restore previously conv erted Windows queues.
	Job Status Manager	Opens the **Job Status Manager** win dow, which shows documents waitin g status updates from a destination. Y ou can check status on a selected job.
	Process Designer	Allows administrators to configure o utput processes. Output processes co ntain a predefined set of actions whi ch impact a document as it is being s ent to a destination. Examples includ e search and replace, setting finishing options, and inserting overlays. Outp ut processes can be associated with a destination or a document. Displays t he **Process Designer**.
	Profile Manager	You can view and work with any typ e of profile.
	Resource Manager	Provides a central way for managing all of the Nuance Output Manager re sources. Resources are used in busine ss rule and output process actions. D

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Menu	Command	Description
		isplays the **Resource Manager** dialo g box.
	Schedule Manager	Configures a recurring schedule for a task. Tasks can be created to run an a d hoc rule, create reports to save or e mail, update output history with pag e counts, import users, or synchroni ze LDAP and Active Directory users . For more information, see *Working with Ad Hoc Rules*.
	Universal PS Driver Wizard	Invokes a wizard to create Windows queues and OM sources: • Add new OM destinations and devices • Add new OM destinations to match existing devices • Match existing destinations and devices
	Console Security	Allows administrators to assign perm issions to users and user groups for e very major area of the system: Desti nations, Sources, Documents, and A dministration. These rights control b oth visibility and which actions can be performed. Displays the **Security Configuration** dialog box.
	Security Roles	Allows administrators to define and modify the security roles of users an d groups. The Role Manager utility c onsists of different types of roles and corresponding security-related permi ssions that can be granted or denied t o each role.
	Message Console	Opens the Message Console, which p rovides a real-time log of all Nuance Output Manager activity. For more i nformation, see *Learning About the Message Console*
	Audit Console	Opens the Audit Console, which d isplays detailed information on use r actions. For more information, see *Learning About the Audit Console*.

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Menu	Command	Description
	Configure Viewer	Opens the **Viewer Configuration** dia log box for configuring the Viewer ut ilities you want to use.
	Console Options > **Check News**	Enables or disables the **News** and **Support** options in the menu bar. T hese options connect you to the inte rnet for viewing up-to-date news or support information related to your Nuance Output Manager serial numb er.
	Desktop Client Installation	Creates a customized installation (M SI) package to install the OM Deskto p Client for a specified DBM server a nd backup DBM server.
Applications	**Destinations**	Displays the **Destinations** applicatio n.
	Sources	Displays the **Sources** application.
	Documents	Displays the **Documents** application.
	Library	Displays the **Library** application.
	Reports	Displays the **Reports** application.
	Devices	Displays the **Devices** application.
	Administration	Displays commands to display the **Administration** applications.
Window	**Alignment**	• **Vertical** — Displays all of the open connections vertically, so they can be viewed at the same time. • **Horizontal** — Displays all of the open connections horizontally, so they can be viewed at the same time. • **Cascade** — Displays a cascading view of all open connections.
	1, 2, 3...	Allows for easily switching between all open connections. Choose the nu mber that corresponds with the conne ction you want to view.
Help	**OM Help**	Displays the Output Manager Console Help window. The Help win dow incorporates contents, index, se arch, and favorites tabs to make it ea

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Menu	Command	Description
		sy for you to find answers to your qu estions.
	About OM Console	Displays program information, versio n number, and copyright.

The menu bar also has a **Themes** option that allows you to change the Nuance Output Manager design and color scheme.

Service status lights

The service status lights display to the right of the menu bar. The lights indicate the status of each monitored service type. Move the pointer over a light to identify its service type and status. You can choose which services influence the status lights in the Manage Product Components Utility. To enable/disable monitoring, select and clear the appropriate check boxes in the **Monitored** column.

Application window

The Output Manager Console consists of a navigation pane and a console window. The navigation pane displays along the left side of the window, providing quick access to the **Destinations**, **Sources**, **Documents**, Library, Reports, Devices, and Administration applications. You can easily switch between applications by clicking the application buttons at the bottom of the pane. The information that displays in the navigation pane and the console window are different depending on the application you select.

You can customize the navigation pane to see more or fewer buttons, add or remove buttons, or gain more space to display items in the pane. You can customize the console window display by configuring the grid views and showing and hiding the grids from the **View** menu. If two grids are displayed, you can also adjust the height of the grids by dragging the bar that separates the grids. A grid layout consists of the column size and order, as well as any grid filter applied. Individual grid layouts can be configured and saved as desired. The last applied layouts will persist between OM Console startups.

Searching is also provided in navigation pane tree views and console window grid views. If a tree view displays in the navigation pane, you can search the tree using the controls in the search panel below the tree. For grid views, you can use the controls in the search panel below the grid columns.

Each grid view can display a maximum of 5000 records. If more than 5000 records exist, navigation images below the grid will enable to allow paging through the records. You can select to view the first page, previous page, next page, or last page.

Review the following sections for more specific information on each application.

- *Destinations application*
- *Sources application*
- *Documents application*
- *Library application*
- *Reports application*
- *Devices application*

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Status bar

The status bar displays the following information.

Options	Descriptions
Nuance Output Manager server	Displays the name of the current Nuance Output Manager server connection. If you have multiple connect ions open, the status bar will update to show the current c onnection as you switch between windows.
User name	Displays the logged in user name.
Connection Status	Displays the status of the connection to the Output Manager DBM Service.

How to Open the Output Manager Console

Use the Output Manager Console to administer Nuance Output Manager. Before you access the console, verify that your system administrator added you as an Nuance Output Manager administrator.

1. Open the Output Manager Console using one of the following methods:
   - On the task bar, click **Start** > **All Programs** > **NSi** > **NSi Output Manager Server** > **Output Manager Console**.
   - Double-click the **OM Console** icon that was placed on the desktop during installation.
2. Specify connection details as described in the following table:

Option	Description
OM server	Enter or select the Nuance Output Manager server to w hich you want to connect.
Connection mode	Select a connection mode: • Net.Tcp — Connect through the Transmission Control Protocol (TCP). • Http — Connect through Hypertext Transfer Protocol (HTTP). • Https — Connect through secure HTTP.
Logon as	Select the logon type: • **Current Windows user** — Connect with your currently active Microsoft Windows credentials. • **Output Manager user** — Connect with your Nuance Output Manager credentials. • **LDAP user** — Connect with your Lightweight Directory Access Protocol (LDAP) credentials. • **Different Windows user** — Connect with different Microsoft Windows credentials.

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Option	Description
User name	If you are logging on as the current Microsoft Window s user, an Nuance Output Manager user, or an LDAP u ser, type your user name.
Password	Type your password.
Domain	If you are logging on as a different Windows user, ente r or select the domain to which you belong.
Remember settings	Save your connection settings for the next logon.

3. Click **Connect**.

Customizing the Grid Views

You can customize the Nuance Output Manager grid view by sorting, grouping by columns, and filtering on values. These actions are useful when trying to quickly find items in the grids. You can also add and remove columns and change the order in which the columns display. In the Output Manager Console, your grid display choices can then be saved to a layout file.

- *Sort by columns*
- *Group by columns*
- *Filter on values*
- *Configure columns*
- *Use grid layouts*

How to Sort by Columns

You can sort data by an unlimited number of columns.

When sorting is applied to the view, the records are rearranged to meet the current sort settings.

- To sort by a column's values and replace any existing sort conditions applied to the current column or other columns, click the column's header.
  An up or down arrow icon is displayed in the header to indicate ascending and descending sort orders respectively.
- To sort by a column's values and preserve existing sort conditions:
  - Click the column header while pressing the Shift key.
  - Right-click a column header, and click **Sort Ascending** or **Sort Descending**.

How to Group by Columns

You can group data by the values of one or more columns.

If you group the data in the grid by a single column, records which have identical values in the same column are arranged into corresponding data groups. Each data group is identified by an expandable group row. If you then group the data by another column, the data rows within each group are combined into second level groups according to the new grouping column's values.

- *Group by a specific column*
- *Remove grouping*
- *Change the group order*

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To group by a specific column

Use one of the following methods to group by a specific column.

- Click the column header you want to group, and drag and drop to place the column in the group panel above the grid.
- Right-click the column header and click **Group By This Column**.

To remove grouping

Use one of the following methods to remove grouping.

- Click the column header you want to remove from grouping, and drag and drop to place the column header back in the column header panel.
- Right-click the grouping column's header and click **UnGroup**.
- To remove all grouping, right click the group panel and **Clear Grouping**.

To change the group order

- Click the column header you want to move, and drag and drop to move the column header to another position within the group panel.

How to Filter on Values

You can customize the grid views by filtering on values.

Filters are used to view only the items that meet conditions you specify. When filtering is applied, the records displayed are restricted to those that meet the current filter criteria. For example in the Documents grid, if you filter the Class column on value A, only documents with a class value of A will display. All of the other documents still exist and can be seen again by removing the filter. You can apply filters to single or multiple columns.

- *Create a simple filter condition*
- *Create a complex filter criteria*
- *Clear the filter*
- *Disable/enable the filter*

To create a simple filter condition

Complete the following steps to select records that contain a specific value in a specific column.

1. Point to the column header you want to filter.
2. Click the filter image (▽) that displays in the column header.
   The filter menu will display listing all of the available values in the column.
3. Select a filter value in the menu. The menu will automatically close. The grid now displays only the records which contain the specified value in the specified column. All of the other records have been hidden from the view, but can be restored by removing the filter.

   Notice that a filter panel is displayed at the bottom of the grid showing the current filter criteria. You can remove the filter by clicking the close (x) button on the panel. You can enable or disable the filter using the check box on the filter panel. The right-side of the panel contains an Edit Filter button, which you can use to easily open the Filter Builder for editing.

To apply another filter, repeat the procedure.

To create complex filter criteria

Complete the following steps to construct filter criteria using the Filter Builder.

1. Right-click a column header and click **Filter Editor**.

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This opens the **Filter Builder** dialog box. If no filtering has been applied to the grid, the **Filter Builder** will contain a new filter condition referring to the clicked column. If filtering has been applied, the **Filter Builder** will list all current filter conditions.

2. Click the column name link in the condition and select the appropriate column from the list.
   All available columns will display in the list.
3. Click operator link in the condition and select the appropriate comparison operator from the list.
   The comparison operator list displays only the operators supported by the current column's data type. For example, the **Priority** column is of the numeric type so the operator list does not display the 'Begins with' operator and other operators that are related to the string type.
4. Click <enter a value>, and enter a comparison value in the box.
5. To add additional conditions, click the plus button next to the group's AND operator.
   This will create new conditions below the current one. Complete each condition statement using the steps above.
6. Click **OK** or **Apply** to filter data using the created filter condition.
   A filter panel will display at the bottom of the grid showing the current filter criteria. The filter panel contains an **Edit Filter** button, which you can click to quickly open the **Filter Builder** for editing.

Tip: You can create more advanced filter criteria containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new filter condition group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the procedure.

To clear the filter

Use one of the following methods to clear filtering.

- Point to the filtered column header and click the filter image (▽) that appears, then click **(All)** on the menu.
- Right-click the filtered column header and click **Clear Filter**.
- To clear all filter criteria, click the (x) button in the filter panel that displays at the bottom of the filtered grid.

To disable/enable the filter

This procedures toggles the filter on and off in the grid.

- Click the **Enable Filter** check box in the filter panel that displays at the bottom of the filtered grid.

How to Configure Columns

You can configure the columns that display in the grid views.

You can change the column order and choose which columns you would like to display.

- *Reorder columns*
- *Hide columns*
- *Display hidden columns*

To reorder columns

- Click and drag the column header you want to move and to a new position.
  Dropping the column header changes the column order.

To hide columns

- Click and drag the column header you want to remove to the cell area of the grid.

  While you are dragging the column in the cell area, the cursor changes its image to a big 'X'.

  Dropping the column header hides the column from the grid.

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To display hidden columns

1. Right-click a column header and click **Column Chooser**.
   This opens the **Customization** dialog box, which lists any hidden columns.
2. Drag and drop a column to place it in the grid.

How to Use Grid Layouts

Grid layouts allow define a grid configuration for reuse.

Layout files can be saved for each application grid view, **Destinations**, **Sources**, **Documents**, **Library**, and **Devices**. Layout files can also be saved for the Documents grid that displays in the **Destinations** and **Sources** applications. This allows you to choose how you want the **Documents** grid to appear for each application you open.

When the Output Manager Console is opened, the grids will display using the last opened layout file. If no layout files have been saved, the grids will display using the default settings. The default settings for the **Destinations**, **Sources**, **Library**, and **Devices** grids are *configured* in the *Configure Columns Utility*. The default settings for the Documents grid are *configured* in the *Configure Document Properties Utility*.

Important: Layouts are saved for the Output Manager Console logged in user on that specific computer. The same user on a different computer will have to setup the layouts on that system.

- *Save grid layouts*
- *Reset grid layouts*
- *Load grid layouts*
- *Delete grid layouts*

To save grid layouts

Complete this procedure to save a grid layout.

Once you have configured the grid views, you can save your grid settings to a layout file. Layouts are saved for the Output Manager Console logged in user on that specific computer. The same user on a different computer will have to setup the layouts on that system.

1. *Configure* the grid view as desired.
2. Right-click in the grid, and click **Layouts** > **Save Layout**.
   This opens the **Save Layout** dialog box.
3. In the **Layout name** box, enter the name of the layout file.
   This specifies to save the layout for the logged in user on the computer.
4. Click **OK**.

To reset grid layouts

Complete this procedure to clear the layout and return to the default grid settings.

- Right-click in the grid and click **Layouts** > **Reset layout**.

To load grid layouts

Complete this procedure to load a grid layout.

1. Right-click in the grid and click **Layouts** > **Load layout**.
   This opens the **Load Layout** dialog box.
2. In the list, select the layout you want to load.
   You can only load layout files created by the currently logged in user.
3. Click **OK**.

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To delete grid layouts

Complete this procedure to delete a grid layout.

1. Right-click the grid and click **Layouts** > **Delete layout**.
   This opens the **Delete Layout** dialog box.
2. In the list, select the layout you want to delete.
   You can only delete layout files created by the currently logged in user.
3. Click **OK**.

Configuring Output Manager Console Security

The **Security Configuration** dialog box is used to assign permissions to individual users or groups of users. Complete the steps in this procedure to assign permissions for the Output Manager Console.

To configure security for the Output Manager Console, you must be assigned the **Allow user to Configure Console Security** permission or be added to the security during the Nuance Output Manager installation. Users added to the security during installation are considered administrators and are assigned all permissions by default.

Permissions authorize a user or group to perform actions within specified areas of Nuance Output Manager. Without the appropriate permissions, attempts to carry out those actions are blocked.

1. From the Output Manager Console menu bar, select **Tools Console Security**.
   This opens the **Security Configuration** dialog box.
2. From the **Users and groups with permissions** list box, select the appropriate user or group in the list.

   The **Assigned permissions** list box will display the assigned permissions for the selected user. If you want to set permissions for a user or group that does not appear in the list, click **Add**. From the **User and Group Selection** dialog box, select the users/groups you want to add and click **OK**. If the user/group is not listed, click **More Users** and then click the type of user you wan to add, Nuance Output Manager users, LDAP users, or Windows users. You can also choose to import LDAP users. See the *Adding users and groups to Nuance Output Manager* topic for detailed procedures on adding users. Once users are added, they are placed in the Nuance Output Manager database, causing them to always be listed in the future.
3. From the **Assigned permissions** box, select or clear the appropriate permissions. Click **Select All** or **Unselect All** to assign or remove all permissions.

   Tip: To assign initial permissions that will allow users to open the Output Manager Console and view the **Destinations**, **Sources**, and **Documents** applications, select the **Allow user to run the OM Console**, **Allow user to access the Destinations Application**, **Allow user to access the Sources Application**, and **Allow user to access the Documents Application** permissions. For information on assigning security for **Destinations**, **Sources**, and **Documents**, see the appropriate help link.
4. Once all of your permission changes are complete, click **OK**.

Defining Viewer utilities

Complete the following steps to define and configure Viewer utilities.

Nuance Output Manager allows you to define the Viewer utilities that display when you right-click documents in the Output Manager Console. You can configure the data types that each Viewer utility can open.

1. On the Output Manager Console menu bar, select **Tools** > **Configure Viewer**.
   This opens the **Viewer Configuration** dialog box.

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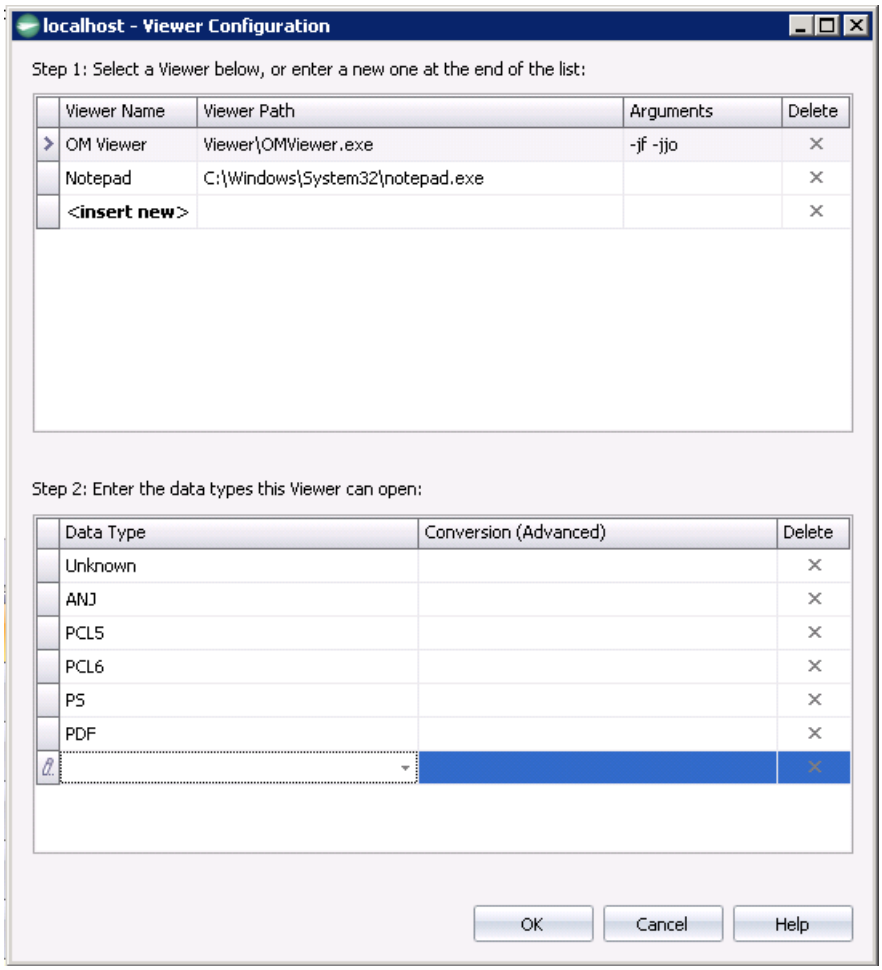

The first grid lists the Viewer utilities that will be available when right-clicking documents in the Output Manager Console.

2. To add a new Viewer utility, complete the following steps.
   a) Click **<insert new>** in the **Viewer Name** column at the bottom of the list.
   b) Enter the name of the Viewer utility.
      This name will display when you right-click documents in the Output Manager Console.
   c) In the **Viewer path** column, enter the path and file name of the Viewer utility executable.
      You can type the path and file name or click the Browse button in the cell to navigate.
   d) In the **Arguments** column, enter any command line options or switches that will be used to start the utility with the desired configuration.
      The Viewer utility is now added.

   Note: You can delete Viewer utilities by clicking the X in the **Delete** column.

3. Select the Viewer utility you want to configure.
   The second grid displays the data types this Viewer utility can open.
4. Complete the following steps to configure the data types for the selected Viewer.
   a) Click **<insert new>** in the **Data Type** column.

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b) Choose a data type this Viewer can open.
c) If necessary, click in the **Conversion (Advanced)** column to assign a conversion.

   You can choose to convert files from the Output Manager Print Server (.tnj) file format to one of the following types: binary (.bin), text (.txt), or Xerox (.xrx).
d) Repeat these steps until you have selected all of the necessary data types for the selected Viewer.

Note: You can delete data types by clicking the X in the **Delete** column.

5. Click **OK**.

How to Configure Columns

Complete the following steps to configure columns.

Administrators can configure the columns that appear by default in the Destination, Source, Document, Library, and Device grids. Users can customize the grids by adding, removing, and reordering columns as necessary from the grids.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, select the columns that you want to configure:

To configure	Do this
Destinations, Sources, Library, and Devices grids	• Click **Configure Columns**. In the console window, the **Configure Columns Utility** displays tab pages representing each grid.
Documents grid	• Click **Configure Document Properties**. The **Configure Document Properties Utility** displays in the console window.

3. Configure columns as follows:
   - To specify if the column will display in the grid and if it will be editable, use the **Visible in Grid** and **Editable in Grid** columns. Cells with a shaded background cannot be edited.
   - To specify if the column will be available and editable from the **Business Rules Manager**, use the **Visible in Rules** and **Editable in Rules** columns.

     The **Alert Rules Manager** also applies for the Destinations grid. Cells with a shaded background cannot be edited.
   - To reorder columns:
     - From the **Configure Columns Utility** tab pages, select a row and click **Move Up** or **Move Down**.
     - From the **Configure Document Properties Utility**, click **Set view order**. From the **View Order** dialog box, select a property and click **Move Up** or **Move Down** as necessary. When finished, click **OK**.
   - You can perform the following procedures from the **Configure Columns Utility** for the **Destinations**, **Sources**, and **Library** grids:
     - To add columns, click **Add** and select columns from the **Add Column** dialog box. Make sure you select the appropriate check boxes for the new column.
     - To remove columns, select a row and click **Remove**.

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- To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a shaded background cannot be edited.

4. Click **Apply** to apply and save column changes.
5. If necessary, select another application tab and make additional changes.

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Users

Managing Users

You can add users and groups from a Microsoft Windows Active Directory server, a Lightweight Directory Access Protocol (LDAP) server, or directly through Nuance Output Manager. Windows users are maintained and authenticated by the Active Directory server. LDAP users are maintained and authenticated by the LDAP server. Nuance Output Manager users are maintained and authenticated by Nuance Output Manager.

- *Add users and groups*
- *Add a department*
- *Map groups to departments*
- *Configure Users* on page 47
- *How to Configure Departments* on page 48
- *Modify a user, group, or department*
- *Remove a user, group, or department*
- *How to Assign a Print Delegate* on page 49

Adding Users and Groups to Output Manager

You can add users and groups to Nuance Output Manager from the **Users** and **Groups** tabs in the **Manage Users** utility and in the **User and Group Selection** dialog box. You can choose to add Nuance Output Manager users, LDAP users, or Windows users. You can also choose to import LDAP users. Once users are added, they are placed in the Nuance Output Manager database and always listed in the future.

The **Manage Users** utility is an Administration application for adding and removing users and groups and configuring quota management settings. You can access the **Users and Group Selection** dialog box when configuring security roles, assigning permissions for the Output Manager Console, destinations, sources, and documents, and for configuring notification profiles during source configuration and business rule creation.

- *Group Membership* on page 40
- *Add an Nuance Output Manager user*
- *Add an Nuance Output Manager group*
- *Add an LDAP user or group*
- *Add a Windows user or group*
- *Import users and groups into Nuance Output Manager*

Group Membership

When you add a group to Nuance Output Manager from a Microsoft Windows Active Directory or a Lightweight Directory Access Protocol (LDAP) server, Nuance Output Manager stores basic information about the group and does not account for group membership. Nuance Output Manager synchronizes users to groups when the following events occur:

- Administrator-level user connects to Nuance Output Manager with the Nuance Output Manager Console using a domain account.
- User connects to the Nuance Output Manager Web Console using a domain account.

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- User authenticates at an MFD with the Unified Client.
- The first time a user prints to an Nuance Output Manager Windows print queue source.
- Periodic subsequent user printing to an Nuance Output Manager Windows print queue source (not to exceed 24 hours).

How to add an Output Manager User

Use this procedure to add an Nuance Output Manager user.

1. From the **Users** tab or the **User and Group Selection** dialog box, click **More Users**, and then click **Add OM User**.
   This opens the **OM User** dialog box.
2. In the **User name** box, type the user name, and in the **Full name** box type the full name of the user.
3. In the **Password** and **Confirm password** boxes, type the user password that will be used when logging on to the server.
4. In the **Email address** box, type an email address for the user.
5. If this user is a member of a department, either click the **Department** box and select one of the existing departments or click **New** to create a department in the **Department** dialog box.
6. Configure the following options for the account:

Option	Description
User must change password at next logon	Specifies whether the user must change the password at the next logon.
Password never expires	Specifies whether the password will never expire.
Account is disabled	Specifies whether the selected account is disabled.

7. Click **OK**.

How to add an Output Manager Group

Perform this procedure to add an Nuance Output Manager group.

Nuance Output Manager groups can include Nuance Output Manager, LDAP, and Windows users.

1. In the Nuance Output Manager console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**.
   This displays the **Manage Users** utility in the right panel.
3. Click the **Groups** tab.
4. Click **More Groups**, and then click **Add OM Group**.
   This displays the **OM Group** dialog box.
5. In the **Group name** and **Email address** boxes, enter a name and an email address for the group.
6. The **Select users** grid displays all of the Nuance Output Manager users. Add users to the group by selecting check boxes for users and clicking the **>** button to move the users to the **Group members** grid, or by clicking the **>>** button to move all users.

   If you want to remove a user from the group, select the check box column the user and click the **<** button to move the user back into the **Select users** grid. You can remove all users by clicking the **<<** button.
7. When the group is complete, click **OK**.

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How to Add an LDAP User or Group

Perform this procedure to add an LDAP user or group.

LDAP groups can only include LDAP users.

1. Depending whether you want to add an LDAP user or group, complete one of the following procedures:

To add an	Do this
LDAP user	On the **Users** tab or in the **User and Group Selection** dialog box, click **More Users** and then click **Add LDAP User**. This opens the **LDAP User** dialog box.
LDAP group	In the **Groups** tab, click **More Groups** and then click **Add LDAP Group**. This opens the **LDAP Group** dialog box.

2. You can select an existing LDAP server or define a new LDAP server.

To	Do this
Select an existing server	• Click the server name in the **LDAP server** box. You can modify the server by clicking the **Modify** button.
Define a new server	**1.** Click **New** to open the **LDAP Server** dialog box. **2.** In the **Server Type** list, click **Microsoft Active Directory Server** or **Generic LDAP Server**. **3.** In the **Server Description** box, enter a name to identify this server. **4.** In the **Server Address** box, enter the DNS (Domain Name System) name of the server. **5.** In the **Port** box, enter the standard IP port for the LDAP server. **6.** In the **Login ID** box, enter the DN (distinguished name) of a user with administrative permissions. **7.** In the **Password** box, enter the password for this user. **8.** Click **Verify Connection** to confirm that a connection can be established using this information. You will see either **Success** or **Failure** next to the button. **9.** After verifying the connection, click **OK**.

3. Specify the LDAP user or group DN (distinguished name). You can either enter the DN into the box or click **Browse** or do the following to browse for the DN:
   a) Click the **Browse** button.
   This opens the **Browse LDAP Server** dialog box.
   b) In the **Base DN** box, type the DN (distinguished name) of the entry to begin the search.
   c) In the **Filter** box, specify criteria to use in the search.
   You can enter a filter or click the arrow to search the list of existing filters.

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d) Click **Search**.
e) Click the pertinent entry in the tree view of the LDAP directory, and then click this user's DN entry in the grid.
f) Click **OK**.

4. If you want to change any of the LDAP detail information for the Nuance Output Manager environment, do one of the following:

For	Do this
LDAP users	To change the user name, display name, or email address, or to select an existing department, select **Override LDAP data**. The boxes will be made available for entry. You do not need to activate the override function to define a new department. Click **New** and the **Department** dialog box is displayed.
LDAP groups	To change the group name, display name, or email address, select the **Override LDAP data** check box.

5. Click **OK**.

How to add a Windows User or Group

Perform this procedure to add a Windows user or group to Nuance Output Manager.

1. Depending on if you want to add a Windows user or group, do one of the following:

To add a	Do this
Windows user	In the **Users** tab or **User and Group Selection** dialog box, click **More Users**, and then click **Add Windows Users and Groups** to open the **Users and Groups** dialog box.
Windows group	In the **Groups** tab, click **More Groups** and then click **Add Windows Users and Groups** to open the **Users and Groups** dialog box.

2. Enter all or part of the user or group name you want to add, and click **Find**.

   Note: You can use options to determine to search the **Local Machine** or a **Domain** for **Users** or **Groups**.

   The results are displayed in the **Selection list** box.
3. Select to add users or groups you in the **Selection list** box.
   The selected users or groups will be automatically added to the **Selected list** box.
4. Optional: If you need to remove an item from the **Selected list** box, click the item in the box to remove it automatically.
5. Click **OK**.

Import users and groups to Output Manager

You can import user data from a file, from an Active Directory server or from an LDAP server.

Procedure	Description
How to import users from a file on page 44	Use this procedure to use the **User/Group Import Wizard** to import user data from a file.

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Procedure	Description
Import from user data from a database	
How to import Active Directory users or groups on page 45	Use this procedure to import Active Directory users and groups.
Import LDAP users or groups on page 45	Use this procedure to import LDAP users and groups.
How to import users or groups with a recurring task on page 46	This procedure describes how to create a recurring task to import users or groups.

How to import users from a file

Use this procedure to use the **User/Group Import Wizard** to import user data from a file.

1. In the navigation pane of the Nuance Output Manager console, click the **Administration** application.
2. In the **Administration** pane, click **Manage Users**.
3. On the **Users** tab in the **Administration - Manage Users** pane, click the **User/Group Import Wizard** button.
4. In the **User and Group Import and Synchronization Wizard**, click **Import user data from a file (no groups)**, and then click **Next**.
5. In the **Select the file containing user data to import** box, enter the full path to the data file.

   You can click the **Browse** button to locate the file.
6. If the first row in the file contains headers, select the **File contains a header record** check box.
7. In the **Select the file delimiter** box, click the delimiter that is used to separate fields in each record.
   - Comma (CSV)
   - Tab
   - Semicolon
8. In the **Type of users contained in this file** box, click to choose the type of data contained in the file.
   - Output Manager Users
   - Windows Users
   - LDAP Users

   Data for existing users is matched by the User Name field.

   Important: You can only add new users from Output Manager user data. You can use Windows user or LDAP user data to update information for existing users.
9. Click the **Next** button.
10. On the **Select Import Options** page, select check boxes to specify how to perform the import:

Select	To
Add new users/groups to Output Manager	Add data from records that do not match any existing user. This option is only available for Output Manager data.
Update information within Output Manager for existing users/groups	Update existing users from records that match an existing user.
Only fill in missing values	Do not replace existing data when updating user data.

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Select	To
Remove users/groups that are not found during the import	Only retain existing users that match the user name in an imported record.

11. On the **Map Imported Values** page, match **Output Manager Property** to a label or data in the first imported row to map a property to a field in the imported records.

    Leave the **Imported Value** for a property blank when there is no matching field in the imported data.
12. Click next, and on the **Preview Import** page, verify the information that is being imported.
13. Click the **Import** button.
    Nuance Output Manager processes the data an displays the results.
14. Optional: You can schedule this import as a recurring task by clicking the **Click here** link.
15. Click **Finish**.

How to import Active Directory users or groups

Use this procedure to import Active Directory users and groups.

Use the LDAP Import Utility to import users and groups from an Active Directory source. You choose the users and groups to import from an Organizational Unit (OU) container in a specific Active Directory server.

1. In the navigation pane of the Nuance Output Manager console, click the **Administration** application.
2. In the **Administration** pane, click **Manage Users**.
3. On the **Users** tab in the **Administration - Manage Users** pane, click the **User/Group Import Wizard** button.
4. In the **User and Group Import and Synchronization Wizard**, click **Import LDAP users and groups**.
5. On the **Specify LDAP Server Connection** page, choose an Active Directory server or click **New** and in the **LDAP Server Details** select "Microsoft Active Directory Server" for **Server Type**, and specify details for your LDAP server.
6. After you choose an Active Directory server or after you save details for an Active Directory server, click the **Verify Connection** button to confirm that you can access the server, and then click **Next**.
7. Define the user and group identifying characteristics of your Active Directory server and click the **Next** button.
8. Use the Active Directory objects tree presented to select the OUs, containers, and groups you wish to import, and then click **Next**.

   Groups will be imported only if they are individually selected. Only security groups will be imported. Distribution groups will not be imported.
9. Choose the desired import options.

   You may also view or modify the user property mappings by selecting the **View or modify which attributes are mapped to Output Manager properties** link.
10. Click the **Import** button.
    OM processes the import and produces a results screen.
11. Optional: You can schedule this import as a recurring task by pressing the **click here** link.
12. Click the **Finish** button.

Import LDAP users or groups

Use this procedure to import LDAP users and groups.

Use the LDAP Import Utility to import users and groups from an LDAP source. You choose the users and groups to import from an Organizational Unit (OU) container in a specific LDAP server.

1. In the navigation pane of the Nuance Output Manager console, click the **Administration** application.

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2. In the **Administration** pane, click **Manage Users**.
3. On the **Users** tab in the **Administration - Manage Users** pane, click the **User/Group Import Wizard** button.
4. In the **User and Group Import and Synchronization Wizard**, click **Import LDAP users and groups**.
5. On the **Specify LDAP Server Connection** page, choose an LDAP server or click **New** and in the **LDAP Server Details** select "Generic LDAP Server" for **Server Type**, and specify details for your LDAP server.
6. After you choose an LDAP server or after you save details for an LDAP server, click the **Verify Connection** button to confirm that you can access the server, and then click **Next**.
7. Define the user and group identifying characteristics of your LDAP server and click the **Next** button.
8. Use the LDAP objects tree presented to select the OUs, containers, and groups you wish to import, and then click **Next**.

   Groups will be imported only if they are individually selected.
9. Choose the desired import options.

   You may also view or modify the user property mappings by selecting the **View or modify which attributes are mapped to Output Manager properties** link.
10. Click the **Import** button.
    OM processes the import and produces a results screen.
11. Optional: You can schedule this import as a recurring task by pressing the **click here** link.
12. Click the **Finish** button.

How to import users or groups with a recurring task

This procedure describes how to create a recurring task to import users or groups.

You can choose to create a recurring task from either the **User/Group Import Wizard** or by clicking **Tools** > **Schedule Manager** in the **Output Manager Console** window.

1. Select the new import job from the jobs list and click the **Modify** button.
2. Optional: You can define your own name and description
3. Click the **Schedule** tab to adjust the schedule.

   By default the import is scheduled to occur every day, at the time of day it was originally created.
4. Click the **Modify** button to modify the schedule.

   You can define a simple schedule of minutes, hours, days, or weeks. You can also define a more complex daily schedule. Finally, you can define the most complex monthly schedule. Set the range of recurrence to define the starting and ending time, if applicable.
5. Click the **Save Edit** button to save the schedule changes.
6. Click the **Tasks** tab to redefine or edit the import task.
7. Select the import task and press the **Modify** button.
   This displays a task summary page.
8. To modify the task, click the **User Import Wizard** button, and refer to help topics for the **User/Group Import Wizard** for further guidance.

How to add a department

Perform this procedure to add and configure a department.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**.
   This opens the **Manage Users** utility in the right panel.

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3. Click the **Departments** tab.
4. Under the **Departments** grid, click **Add**.
   This opens the **Department** dialog box.
5. Type the name of the new department in the **Department name** box.
6. In the **Select users** grid, choose each user that you want to add to the new department by selecting the check box column for the user.
7. When you finish adding users, click the **>** button to move selected users into the **Department members** grid. You can click the **>>** button to move all users.

   To remove users from the department, select the check box column for users in the **Department members** grid and click the **<** button. This returns selected users to the **Select users** grid. You can click the **<<** button to remove all users.
8. When you are finished adding users to the new department, click **OK**.
9. Use the following procedures to configure departments on the **Departments** tab.
   - Manage quota profiles
     - *Assign a quota profile*
     - *Create a basic quota profile*
     - *Create user quota rules*
   - Manage desktop client profiles
     - *Assign a desktop client profile*
     - *Create a desktop client profile*
   - *Configure balance settings*

How to map groups to departments

Perform this procedure to map groups to departments.

1. In the Output Manager Console navigation pane, click the **Administration** application.
2. In the navigation pane, click the **Manage Users**.
   This opens the **Manage Users** utility in the right panel.
3. Click the **Departments** tab.
4. Click the **Groups to Depts Mapping** button.
5. Associate groups to departments.

Configure Users

Use this procedure to configure users on the **Users** tab.

1. In the **Administration** application, click **Manage Users**.
2. To inherit quota settings from a department, including balance settings, select **Inherit**.

   By default, users are configured to inherit settings from the department. If you do not want the user to inherit quota settings, clear the check box.
3. If you do not want to track print jobs for the user, select **Do Not Track**.
4. Click in the **Card ID** cell and type an identification value that the user enters on the MFP before faxing or scanning.
5. To enter a second identification value, click in the **Secondary Card ID** cell and type another value.
6. Assign a print rules profile to the user.

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7. Assign a desktop client profile to the user.
8. Assign a device profile to the user.
9. Assign print delegates to the user.
   Print delegates have permission to print documents for the user.
10. Select a role for the user.
11. Click **Apply**.

How to Configure Departments

Use this procedure to configure users departments on the **Departments** tab.

1. Type a department name.
2. Type a full name for the department.
3. Assign a print rules profile to the department.
4. Assign a desktop client profile to the department.
5. Assign a device profile to the department.
6. Assign an allowance profile to the department:
   a) Select the **Set Balance** check box.
   b) Select the allowance profile.
7. Click **Apply**.

How to Modify a User, Group, or Department

Use this procedure to make changes to an existing user, group, or department.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**. The **Manage Users** utility is displayed in the right panel.

To modify a	Do this
User	Click the **Users** tab, and in the grid, select a user and click **Modify**. • If you select an Nuance Output Manager user, this opens the **OM User** dialog box. • If you select an LDAP user, this opens the **Edit LDAP User** dialog box. • If you select a Windows user, this opens the **Edit Windows User** dialog box.
Group	Click the **Groups** tab, and in the grid, select the group you want to modify and click **Modify**. • If you select an Nuance Output Manager group, this opens the **OM Group** dialog box. • If you select an LDAP group, this opens the **LDAP Group** dialog box. **Note:** You cannot modify a Windows group.

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To modify a	Do this
Department	Click the **Departments** tab, and in the grid, select the department you want to modify and click **Modify**. Use the **Department** dialog box to add and remove department members.

How to Remove a User, Group, or Department

Use this procedure to remove a user, group, or department.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Users**.
   This displays the **Manage Users** utility in the right panel.
3. Click the **Users** tab, **Groups** tab, or **Departments** tab.
4. In the grid, select the user, group, or department you want to remove, and click **Remove**.

How to Assign a Print Delegate

You can assign a user or group as a print delegate for another user. If you assign a group as a delegate, all members of the group can print documents for the user. A user who has print delegates can choose not to delegate printing for specific documents.

1. In the **Administration** application, click **Manage Users** and click the **Users** tab.
2. On the **General** or **Balances** tab, select the user for whom you want to assign a print delegate.
3. In the **Print Delegates** cell, click the ellipsis button.
4. In the **User and Group Selection** dialog box, select the delegate user or group.
5. Click **OK**.
6. Click **Apply**.

Managing Output Manager Security Roles

Administrators can use **Role Manager** to define and modify the security roles of users and groups. The **Role Manager** utility consists of different types of roles and corresponding security-related permissions that can be granted or denied to each role. There are three roles defined in Nuance Output Manager:

OM Document Owner	Defines the rights, or permissions, of document owners. You can limit or extend the permissions of document owners as appropriate. For example, an administrator who wants to prohibit document owners from assigning documents to destinations would remove this permission. This role is limited to Documents and Library applications.
OM System Administrators	Defines the members and permissions for system administrators. System administrators can configure and manage all of the security permissions. As with the Document Owner role, you can limit or extend the permissions of system administrators as needed. By default, all permissions are granted to the System

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	Administrators role at the time of installation; you can modify permissions as appropriate for the installation. A company might have several system administrators. This role defines permissions for all applications, that is, Destinations, Sources, Documents, Library, Reports, and Administration.
OM Security Administrators	Is identical to the role of System Administrator except that a subset of permissions is always unavailable for modification; this safeguard insures that an installation does not accidentally lock itself out of Nuance Output Manager, preventing the configuration of security permissions. A company typically would have only one Security Administrator.

Warning: These permissions are set for the role and cannot vary for users or groups within a role.

You can add and remove users and groups from the System Administrator and Security Administrator roles as needed to manage security access; for example, you might want add a system administrator to serve as backup to an established system administrator.

Tip: Permissions can also be set through the Destinations, Sources, and Documents applications, and for the Output Manager Console.

- *Add users or groups*
- *Remove users or groups*
- *Modify security permissions*

How to Add Users or Groups

Complete the steps in this procedure to add users or groups to a security role.

1. On the Output Manager Console menu bar, select **Tools** > **Security Roles**.
   This opens the **Role Manager** dialog box.
2. In the **Role name** box, select the role to which you want to add a member.

   Note: Because a document can have only one owner, you cannot add members to the Document Owner role.
3. Click **Add**.
   This opens the **User and Group Selection** dialog box is displayed.
4. From the grid, select the users or groups that you want to add, and then click **OK**.

   If a user or group is not listed, click **More Users** to locate the user. From the **More Users** list, you can choose to add Nuance Output Manager users, LDAP users, or Windows users and groups. You can also choose to import LDAP users and groups. When you are finished, click **OK**. See the *Adding users and groups to Nuance Output Manager* topic for detailed procedures on adding users.
5. Click **OK**.

How to Remove Users or Groups

Complete the steps in this procedure to remove a user or group from a security role.

1. On the Output Manager Console menu bar, click **Tools** > **Security Roles**.
   This opens the **Role Manager** dialog box.

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2. In the **Role name** box, select the role from which you want to remove a member.
3. From the grid, click the users or groups that you want to remove.
4. Click **Remove**.

How to Modify Security Permissions

Complete the steps in this procedure to modify the security permissions of a role.

Warning: Permissions are set for the role and cannot vary for users or groups within a role.

1. On the Output Manager Console menu bar, select **Tools** > **Security Roles**.
   This opens the **Role Manager** dialog box.
2. Next to the **Role name** box, click the browse button (**…**).
   This opens the **Manage Roles** dialog box.
3. Select the role you want to modify and click **Modify**.
   This opens the **Configure Role** dialog box. This dialog box lists, in tree form, all the security permissions for the selected role.
4. Modify permissions by selecting or clearing check boxes.

   Note: In the list of permissions for the Security Administrator role, a subset of permissions is unavailable for modification so that security can always be configured.
5. When you are finished, click **OK**.
6. Click **Close**.

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Devices

Learning About the Devices Application

Use the **Devices** application to manage and monitor devices. The navigation pane displays a configurable Devices tree that shows all devices. You can drag-and-drop devices to device groups.

Nuance Output Manager differentiates between destinations and devices. Destinations are queues where Nuance Output Manager sends documents. They can be queues on physical printers or a variety of other destination types, such as network folders and FTP servers. Devices are the physical printing hardware. You can define multiple destinations for the same device. This is helpful for production devices where the controller supports multiple LPD queues, each defined with different print preference settings.

The console window displays a tabbed view of the Device tree selection. When a device is selected in the tree, a device home page will display showing the properties and status of the device. Below the home page, a grid displays listing all destinations associated with the device. When a device group (folder) is selected in the tree, the Device grid will display listing all of the devices in the group. Notice the Device grid is in a tab page control. By default, navigating in the tree will replace the information in the active tab. To open a device or group in new tab, right-click the item and click Open in New Tab. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

Managing Devices

Nuance Output Manager differentiates between destinations and devices. Destinations represent "queues" where Nuance Output Manager can send documents. Devices represent the physical printing hardware. You can control devices from the Output Manager Console using the following procedures.

- *Open a device*
- *Move a device*
- *Rename a device*
- *View device output history*
- *View SNMP alert history*
- *Initiate an SNMP update for a device*

How to Open a Device

You can use one of several methods to open a device in the current tab or in a new tab.

- Use one of the following methods to open a device.

To open a device	Do this
In the current tab	In the **Devices** tree, click a device.
In the current tab	In the **Devices** tree, right-click a device and click **Open**.
In a new tab	In the **Devices** tree, right-click a device and click **Open in New Tab**.

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How to Move a Device

You can use drag and drop or a shortcut menu command to move a device.

Devices can be organized into device groups. Once groups are created, devices and groups can be easily moved in the tree as necessary.

1. In the **Devices** tree, click and drag a device or device group to a different location in the tree.

   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the item will be placed.
2. Right-click a device in the **Devices** tree and click **Move to Group**, then when prompted, select the group where you want to move the device.

How to Rename a Device

Use this procedure to rename a device.

1. In the **Devices** tree, right-click a device and click **Rename**.
2. Type the new device name and press Enter.

   To cancel the rename, press Esc.

How to View the Device Output History

Complete this procedure to view the output history of devices or device folders.

You can choose from one of the predefined history time frames or create a custom query.

1. In the **Devices** tree, select a device or device folder.
2. Right-click the selected device or folder and click **Output History**, and then click to use a predefined history time frame or to create a custom query. To create a custom query, complete the following steps:
   a) In the submenu, select **Custom query**.
   This opens the query tool dialog box.
   b) Click the + button next to the AND operator.
   c) To select the column, click the column name link in the condition and select the appropriate column from the list.
   This displays all available columns in the list.
   d) Click the operator link in the condition and select the appropriate comparison operator from the list.

   The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
   e) Click the **<enter a value>** link, and enter a value in the box.
   f) To add additional conditions, click the + button next to the group's AND operator, and then repeat steps *2.c* on page 53 through *2.e* on page 53 to complete new condition statements.
   g) Click **OK** to query data using the statement.

   Tip: You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and clicking **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

   To cancel the query, click the **Cancel Query Mode** button below the grid.
3. In the **Destination Output History** window, review the output history for the selected device or folder.
4. Use the following methods to change the history as needed.

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- In the **Devices** tree, click devices and folders to update the grid to match a new tree selection.
- Click a new history time period to update the grid to match a new time period selection.
- Click **Refresh Query** below the grid to update the grid with the latest information.

5. You can do the following with the search results:

To	Do this
Search the tree	• In the Search box below the tree, type the text you want to find and press Enter or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.
Search the grid	• In the Search box below the grid, type the text you want to find, click the column in the grid you want to search, and then press Enter or click the Search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print the history	• Click the **Print** button below the grid to print the history.

How to View the SNMP Alert History

Complete this procedure to view the SNMP alert history of devices or device folders.

You can choose from one of the predefined history time frames or create a custom query.

1. In the **Devices** tree, select a device or device folder.
2. Right-click the selected device or folder and point to **SNMP Alerts History**, and then click to use a predefined history time frame or to create a custom query. To create a custom query, complete the following steps:
   a) In the submenu, select **Custom query**.
   This opens the query tool dialog box.
   b) Click the + button next to the AND operator.
   c) To select the column, click the column name link in the condition and select the appropriate column from the list.
   This displays all available columns in the list.
   d) Click the operator link in the condition and select the appropriate comparison operator from the list.
   The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
   e) Click the **<enter a value>** link, and enter a value in the box.

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f) To add additional conditions, click the + button next to the group's AND operator, and then repeat steps *2.c* on page 54 through *2.e* on page 54 to complete new condition statements.

g) Click **OK** to query data using the statement.

Tip: You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and clicking **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

To cancel the query, click the **Cancel Query Mode** button below the grid.

3. In the **SNMP Alert History** window, review the SNMP alert history for the selected device or folder.
4. Use the following methods to change the history as needed.
   - In the **Devices** tree, click devices and folders to update the grid to match a new tree selection.
   - Click a new history time period to update the grid to match a new time period selection.
   - Click **Refresh Query** below the grid to update the grid with the latest information.
5. You can do the following with the search results:

To	Do this
Search the tree	• In the Search box below the tree, type the text you want to find and press Enter or click the search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.
Search the grid	• In the Search box below the grid, type the text you want to find, click the column in the grid you want to search, and then press Enter or click the Search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print the history	• Click the **Print** button below the grid to print the history.

How to Initiate an SNMP Update for a Device

Complete this procedure to initiate and SNMP update for a selected device.

1. In the **Devices** tree, select a device.
2. Right-click the selected device and click **SNMP Update**.

After you complete this procedure, any SNMP updates are performed automatically.

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How to configure access control

Access control enables an administrator to regulate access to specific features of an MFD, such as restricting a users to making only black and white copies on a particular MFD.

To support this feature, an MFD must provide API support for access control and the device must be configured as an MFP type in the device configuration.

1. In the **Output Manager Console**, click the **Devices** application.
2. In the **Devices** list, right-click the device you want to configure.
3. On the shortcut menu, click **Configure Access Control**.
4. In the **Assign Access Control** profile dialog box, select check boxes to apply access control profiles for **Users**, **Groups**, or **Departments**.
5. To edit or create access profiles, click the browse button (**...**) for a user, group, or department, and add, remove, or edit profiles in the **Manage Profiles** dialog box.
6. When you add or edit a profile, you can edit **Basic** settings that apply for every type of MFD or **Advanced** settings that are specific to the MFD.

Manage Device Groups

Device groups are used to organize devices in the Device tree. Groups are represented as folders in the tree. In the Output Manager Console **Devices** tree, you can create, move, rename, and delete device groups.

- *Create a device group*
- *Move a device group*
- *Rename a device group*
- *Delete a device group*

To create a device group

1. In the **Device** tree, right-click a device group (folder) and click **New Group**.
   A new group (folder) titled *UnNamed* is added to the device group.
2. In the edit field, type the name of the new group and press Enter.

To move a device group

- In the **Device** tree, click a device group and drag it to a new location in the tree.

  As you drag the item a yellow arrow will appear to the left of the tree to indicate where the group will be placed.

To rename a device group

1. In the **Device** tree, right-click a device group, and click **Rename**.
2. In the edit field, type the new group name and press Enter.

   To cancel the rename, press Esc.

To delete a device group

All objects in a group must be removed before a group can be deleted. Groups that contain devices or device groups cannot be deleted.

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- In the **Device** tree, right-click a device, and click **Delete**.

How to Add Devices

Complete this procedure to add a device to the **Devices** application.

1. In the **Devices** tree, right-click a device group (folder) where you want to add devices, and click **New Device**. This opens the **New Device** dialog box.
2. In the **Name** box, enter the name of the device.
3. In the **Server** list, select the appropriate server.
4. In the **IP Address** box, enter the IP address of the device.
5. Click **OK**.

How to Modify Devices

Complete the following steps to modify devices in the Devices application.

1. From the Devices tree or grid, right-click the device you want to modify and click **Configure Device**. This opens the **Configure Device** dialog box.
2. Click directly in the grid to change the **Device Name** or **Type**.
3. Click **OK**.

How to Create Destinations

Complete this procedure to create a destination from a selected device.

1. In the **Devices** tree or grid, right-click a device and click **Create Destination**. This opens the **Add Destination** dialog box.
2. In the **Type** list, select the type of destination you want to create.
3. In the **Server** list, select the appropriate server.
4. Under **Assign to group**, select the destination group where the destination will be created.
5. Click **OK**.

The destination will be created using the device name. If a destination already exists using that name, a counter will be added to the end of the destination name.

Search for Devices

You can search for devices from the Device tree and Device grid.

- *To search the Devices tree* on page 57
- *To search the Devices grid* on page 58

To search the Devices tree

1. In the Search box below the tree, type the text you want to find.
2. Press Enter or click the search button.

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If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to move to the previous occurrence and move to the next occurrence.

To search the Devices grid

1. In the Search box below the grid, type the text you want to find.
2. Click the column in the grid you want to search.
3. Press Enter or click the Search button.

If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

Managing devices through SNMP

Simple Network Management Protocol (SNMP) is used to communicate with network capable printing devices. It allows Output Manager to detect devices, gather information and status about devices and manage them. This provides flexibility and allows making use of the broadest set of features the devices support. Output Manager currently supports multiple versions of SNMP. You can select whichever one is most suitable and supported by the devices in your network.

You can specify how frequently the Output Manager SNMP Service updates Nuance Output Manager destinations that are auto-detected SNMP printers. The SNMP update has two types of values, dynamic and static, each with their own frequency setting. Dynamic values are values that change while the printer is being used, such as out of paper and low on toner. Static values are values that do not change or change very infrequently, such as the printers name and IP address. In most cases, you should configure the dynamic values to update more frequently than the static values. Dynamic value updates are needed to maintain timely alerts so the printer can stay operational. Additionally, SNMP metering can periodically gather information from certain devices about how many copies, prints, faxes, etc. have been made on the device and save the data to be used for reporting.

- *SNMP Versions and Communication Security*
- *Configure SNMP Services* (including monitoring devices)
- *Organizing detected SNMP devices* on page 60
- *Detecting Printers*
- *How to Override Global SNMPv3 Settings* on page 63

SNMP Versions and Communication Security

For the Nuance Output Manager SNMP service to communicate with a printing device, the security configuration must match between Nuance Output Manager and the device.

Nuance Output Manager supports SNMP versions 1 (SNMPv1), 2 (SNMPv2c), and 3 (SNMPv3). SNMPv1 and SNMPv2c use a community name for security. The Nuance Output Manager SNMP service is installed with a default community name of *public*. Nuance Output Manager uses the default community name during device detection and stores it with the new Nuance Output Manager device. Subsequent communication with the device uses the community name that is stored with the Nuance Output Manager device. To change the community name for a device, change it on the physical device and in the Nuance Output Manager Device Configuration dialog.

SNMP communicates with SNMPv3-enabled devices with a matching user name, authentication password, and protocol configured between the devices and Nuance Output Manager. To encrypt the data being communicated, use a matching encryption password and protocol.

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> **Note:** If Nuance Output Manager does not communicate with devices through SNMPv3 with matching user names, authentication passwords, and protocols, include a remote engine context name in the configuration settings.

You can specify global SNMPv3 settings to communicate with all SNMPv3-enabled devices. If a device does not allow you to change SNMPv3 settings such as user name, authentication protocol, and encryption algorithm, you can override the SNMPv3 settings for the device on the **Device Configuration** dialog box accessible through the **Devices** application.

How to Configure SNMP Services

Complete this procedure to configure SNMP monitoring for Nuance Output Manager.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Devices**.
3. In the **SNMP services** grid, select the check box for the server you want to configure.
4. Click **Configure** to open the **SNMP Server Configuration** dialog box.

   > **Tip:** Click the **Help** button for information about options in this dialog box.

5. Configure the settings in **Autodetection** as follows:
   a) In the **Auto-detection period** field, specify how often you want to run the auto-detection process.

      Auto-detection is initially disabled, so the default value is 00.00:00:00.

      For example, to specify an auto-detection period of one hour, set the value to 00.01:00:00.
   b) Select **Use SNMP Detection**.
   c) Select the SNMP version that Nuance Output Manager uses for auto-detection.

      Querying the network with both SNMPv1 and SNMPv3 could increase the detection time.
   d) Select the detection method:
      - To use a broadcast query, select **Broadcast**.
      - To search IP address ranges, select **IP Range(s)** and click **Configure ranges** to configure settings in the **Configure IP Ranges** dialog box.
   e) Select **Use web (HTTP) detection (requires IP Range configuration)** to use HTTP to search for devices that do not respond to SNMP queries. If Nuance Output Manager detects devices through HTTP, Nuance Output Manager retrieves only the device manufacturer and model.
6. Configure the settings in the **SNMP update and meter parameters** section as follows:
   a) To use the Domain Name System (DNS) instead of the IP address to communicate with a printer, select **Use DNS printer names if available**.
   b) If necessary, change the **Default community name** value of `public` to your community name when running SNMP detection using SNMPv1 or SNMPv2c.

      If you change the default community name, configure devices with the new community name.
   c) Select the **Default SNMP version** for global communication with all SNMP devices.

      > **Tip:** Click the **Help** button for more information about **Default SNMP version** options in this box.

   d) Select the SNMP versions that Nuance Output Manager uses to detect devices.

      Selecting both **Allow SNMPv1/v2c queries** and **Allow SNMPv3 queries** increases the time it takes Nuance Output Manager to query for devices.
7. To define when Nuance Output Manager gathers information from a device, configure the settings in the **SNMP metering** section as follows:

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a) Select **Update metering values**.
b) Enter the **SNMP metering period**.
c) Enter the **SNMP metering timeout** period in seconds.

8. To define how often Nuance Output Manager updates static values, configure the settings in the **Static update** section as follows:
   a) Select **Update static values**.
   b) Enter the **Static update period**.
   c) Enter the **Static update timeout** period in seconds.
9. To define how often Nuance Output Manager updates dynamic values, configure the settings in the **Dynamic update** section as follows:
   a) Select **Update dynamic values**.
   b) Enter the **Dynamic update period**.
   c) Enter the **Dynamic update timeout** period in seconds.
10. To define a custom interval for polling the DBM service for devices in an alert condition, configure **Alert Monitor** settings:
    a) Select **Allow alert checks**.
    b) Specify the custom polling interval.
11. If you selected **Auto** or **SNMPv3** as the default SNMP version, configure settings in **Global SNMPv3 settings**.

    Global settings enable Nuance Output Manager to communicate with all SNMPv3-enabled devices. Configure all SNMPv3 devices with matching settings. If you cannot configure a device with global settings, you can override the global settings for the device.
    a) In the **User** field, type the user name Nuance Output Manager and SNMPv3-enabled devices use to communicate.
    b) In the **Authentication Password** field, type the password Nuance Output Manager uses to authenticate devices.
    c) Select the authentication **Protocol**.
    d) Optional: In the **Encryption password** field, type the password Nuance Output Manager uses to encrypt data.
    e) Select the encryption **Algorithm**.
    f) In the **Remote engine context name** field, type the name of the specific context for communication between Nuance Output Manager and SNMPv3-enabled devices.
12. Click **OK**.

Organizing detected SNMP devices

These task are performed in the **Autodetected devices** grid. The grid lists all of the SNMP devices that have been detected. There are five tabs below the grid, **Unused devices**, **OM devices**, **Ignored devices**, **All devices**, and **Merged devices**.

Use the devices grid to do the following:

- *Perform an immediate SNMP update for detected SNMP devices*
- *Delete SNMP devices*
- *Add detected devices as Nuance Output Manager destinations*
- *Ignore SNMP devices*
- *Restore ignored SNMP devices*
- *Merge Nuance Output Manager devices*
- *Unmerge Nuance Output Manager devices*

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- *Demote Nuance Output Manager devices*

To update detected SNMP devices

You can perform an update from any of the tab pages.

1. Select the check boxes for SNMP devices you want to update.
2. Click **Update**.

To delete SNMP devices

1. Select the check boxes for the devices you want to delete.
2. Click **Delete**.

To promote devices as Nuance Output Manager devices

1. On the **Unused devices** tab, select the check box for each device you want to be added as a Nuance Output Manager destination.
2. Click **Promote to OM**.
   The selected devices are moved to the **OM devices** tab.
3. When prompted whether to create a destination for the selected device, click **Yes**.
4. In the **Add Destination** dialog box, select the destination **Type**.
   You can choose IPP JDF/JMF, LPR, or socket.
5. Select the Nuance Output Manager **Server**.
6. Select the group where you would like the destination created.
7. Click **OK**.

To ignore SNMP devices

1. On the **Unused devices** tab, select the check box for each device you want to ignore.
2. Click **Ignore**.

The selected devices are moved to the **Ignored devices** tab.

To restore ignored SNMP devices

1. From the **Ignored devices** tab, select the check boxes for each device you want to restore.
2. Click **Restore**.

The selected devices are moved to the **Unused devices** tab.

To merge Nuance Output Manager devices

1. On the **OM devices** tab, select the check box for each device you want to merge.
2. In the **Merge Devices** dialog box, select the main device.
   This device will remain listed on the **OM devices** tab.
3. Click **OK**.

The devices are listed on the **Merged devices** tab.

To unmerge Nuance Output Manager devices

1. On the **Merged devices** tab, select the check box for each device you want to unmerge.

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2. Click **Unmerge**.

The devices are listed on the **OM devices** tab.

To demote Nuance Output Manager devices

1. On the **OM devices** tab, select the check boxes for the devices you want to demote.
2. Click **Demote**.

The selected devices are listed on the **Unused devices** tab.

Detecting devices using SNMP

Devices can be detected on all servers that have the Nuance Output Manager SNMP Service installed. Once devices are detected, they can be associated with new Nuance Output Manager destinations.

SNMP detection can be performed automatically or manually.

- *Detect devices automatically using SNMP*
- *Detect devices manually using SNMP in the Manage Devices utility*
- *Detect devices manually using SNMP in the Output Manager Device Wizard*

Detect devices automatically using SNMP

1. Configure SNMP services as described in *How to Configure SNMP Services* on page 59.
2. When configuring SNMP services, specify an auto-detection period value other than 00.00:00:00. This frequency period is in the format days.hours:minutes:seconds and defines when auto-detection runs.

Detect devices manually using SNMP in the Manage Devices utility

1. After SNMP services have been configured, click **Manage Devices** in the **Administration** application.
2. In the SNMP services section, select the check box for the SNMP server on which to detect devices.
3. Click **Detect now** to open the **Select Detection Ranges** dialog box.
4. Select **Broadcast** or **IP Ranges** as the detection method.

   If you select **IP Ranges**, specify the IP address ranges for which you want to detect devices. The dialog box contains all the ranges that have been configured for the SNMP service.

   a) Select the check boxes for the IP address ranges.
   b) If no ranges were configured for the service or the ranges that you want are not included, add them using one of the following options:
      - Click **Import ranges from file** to load ranges from a CSV file.
      - Add a single range at a time.
      - Click **Discover** next to **Discover domain IP ranges** to collect IP address ranges. This is a useful option if you do not know the network topology.

      Note: Ranges are merged in the list if adding a range would result in overlaps or joining boundaries.

   c) Click **OK** after selecting the IP ranges.

      The selected ranges are used for this manual detection, but any modifications to the list of ranges does not alter the configured ranges for the SNMP service.

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> **Note:** During detection, addresses that do not respond to SNMP queries are scanned as web addresses for an alternate means of detecting devices. If they are successful by this alternate detection, the printer manufacturer and model are retrieved and a device is added to the **Autodetected devices** grid.

5. When detection is completed, the Auto Detection Status column indicates `Last completed: date time`.

After detection is completed, use the method described in *Organizing detected devices* to create destinations.

Detect devices manually using SNMP in the Output Manager Device Wizard

1. On the Output Manager Console menu bar, click **Tools** > **Device Wizard**.
2. Select **Detect devices via SNMP**, then click **Next**.
3. On the **SNMP Services** page, select servers on which you want to run SNMP detection.

   The grid lists all of the servers with the Nuance Output Manager SNMP Service installed.
4. Click in the **Detection Method/IP Range(s)** column to open the **Select Detection Ranges** dialog box.
5. Select IP address ranges as described in *step 4* in *Detect devices manually using SNMP in the Manage Devices utility* on page 62 above, then continue with the next step.
6. Click **Detect**.
   This starts SNMP detection on the selected servers.
7. When the detection is complete, perform the following steps on the **SNMP Detection** page to create new Nuance Output Manager destinations to be associated with the SNMP devices.

   You can change the view of the grid to show only the newly detected devices or to show all devices. Newly detected devices are devices where no destinations are yet associated with it.

   a) In the grid, select the devices that you want to be associated with new Nuance Output Manager destinations.
   b) In the **Destination Type** column, select the destination type you want to create. You can create IPP, LPR, or socket destinations.
   c) In the **Destination Group** column, select where the Output Manager Destinations will be grouped.
   d) In the **Destination Server** column, select the appropriate **Server**.
   e) Click **Next**.
   f) On the **Confirmation of Action** page, click **Continue** to create the destinations.
      This displays the **Device Wizard Log**.
   g) Optional: You can save the log file by clicking **Save**.
8. Click **Finish**.

How to Override Global SNMPv3 Settings

Complete this procedure to override the global SNMPv3 settings for a device.

1. In the Output Manager Console, click the **Devices** application.
2. Right-click the device and click **Configure**.
3. On the **SNMP** tab, select **Override global SNMP v3 settings**.
4. Define the device-level SNMPv3 settings and click **OK**.

   > **Important:** Specify a value for each SNMPv3 setting.

5. In the **Devices** application, right-click the device and click **SNMP Update**.

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Ethernet Card Reader

The Ethernet Card Reader connects to a printer and authenticates users to release print jobs securely.

The Ethernet Card Reader authenticates users to securely release all of that user's print jobs upon card swipe at single function and multifunction printers. The card reader has two connection ports:

- One port connects to the Ethernet network, and supports Power-over-Ethernet
- One port connects to the printer

When a user presents their ID card at the card reader, documents associated with that card's owner are released.

Hardware Overview

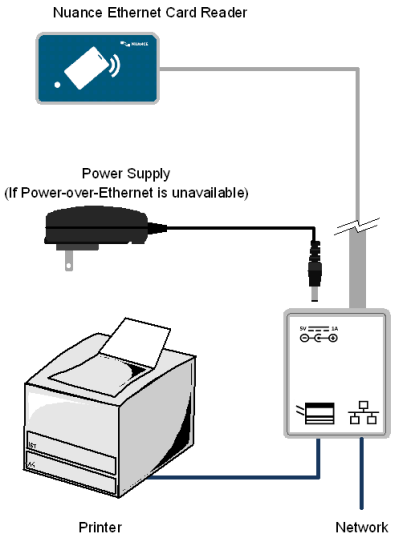
The Ethernet Card Reader is a dual frequency (125 kHz and 13.56 MHz) RFID card reader with two RJ-45 10/100 Fast Ethernet ports.

The LED light on the card reader indicates the status of the network system and the card reader itself. Different patterns of lights appear when the card reader is online or offline. See *LED Status Messages*.

How to Connect the Ethernet Card Reader

This procedure provides the basic steps for connecting an Ethernet Card Reader to a printer.

The following diagram shows the physical hardware connections:



To connect the Ethernet Card Reader, do the following:

1. Disconnect the existing network cable from the printer and connect it to the Network port on the card reader.
2. Connect the provided Ethernet cable to the printer's network jack and the Printer port on the card reader.
3. If the network does not supply Power-over-Ethernet, attach the separate power supply to the card reader.
4. Secure the card reader near or on the printer using the provided self-adhesive Velcro strips.
5. Secure the card reader cables using the cable ties and self-adhesive cable tie mounts.

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When the card reader is powered up, the card reader beeps and the LED light appears orange for a few seconds, then changes to the appropriate light for its current state. See LED Status Messages.

How to Add the Ethernet Card Reader

This procedure provides the basic steps for detecting and adding an Ethernet Card Reader.

The printer must be a known Output Manager device and must be promoted in Output Manager.

After the Ethernet Card Reader is connected to the printer, it needs to be added in Output Manager.

1. On the Output Manager Console menu bar, select **Administration** > **Manage Devices**.
2. Select the server that is associated with the Ethernet Card Reader.
3. Click **Detect readers**. The **Detect Reader** dialog box opens.
4. Enter the IP address range in the **Start** and **End** fields, and click **OK**.
5. When the Ethernet Card Reader is detected, go to **Devices** > **Configure** > **Devices Details** and confirm that the **Secure release type** is **Nuance Ethernet Card Reader** and the **Reader IP Address**, **Reader Serial Number**, and **Reader Firmware Version** fields are completed.
6. Click **OK**.

How to Update the Ethernet Card Reader Firmware or Configuration

This procedure provides the basic steps for updating the Ethernet Card Reader firmware or configuration settings.

If you receive a firmware update or a configuration update, you can apply it to the Ethernet Card Readers in Output Manager. Do the following:

1. Go to **Devices** > **Configure**.
2. Right click and select **Device Details**.
3. Select one or more printers, and right-click and select **Configure**.
4. In the **Device Configuration** dialog box, click the **Device Details** tab.
5. Do one of the following:
   - To update one card reader, click **Update** and browse to the .bf2 firmware or the .bec configuration file.
   - To update more than one card reader, click **Select all** or select the card readers individually. Click **Update card reader firmware** and browse to the .bf2 firmware or the .bec configuration file.
6. Click **OK**.

LED Status Messages

The Ethernet Card Reader displays different patterns of LED lights to communicate the system status to users. Some types of LED light patterns might not be used on all systems.

LED Behavior	Meaning
Solid red light	The system is ready for the user's ID card.
Slow flashing green light	The system is authenticating the user's ID card.
Fast flashing green light	There are no print jobs for the user.
Fast flashing red light	The user's ID card is not recognized.
Slow flashing red light	There is no printer associated with the card reader.

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Ethernet Card Reader Troubleshooting

The following table describes the behavior of the LED patterns when the card reader is offline and provides possible tips to fix the error.

LED Behavior	Meaning	Action
One green blink	The card reader's network port has an Ethernet link, but does not have a valid IP address.	• Verify with your IT department that a DHCP server is accessible at this network drop. • Verify with your IT department that the DHCP server will assign an IP address to devices with the Vendor Class Identifier (DHCP Option 60) "Baltech Proxreader".
Two green blinks	The card reader is attempting to connect to its configured host or has not been added to the system.	• If this light pattern continues for more than 60 seconds, verify the system configuration and manually add the card reader, if required.
One red blink	The card reader cannot detect an Ethernet link on either of its ports.	• Verify that the Ethernet cable is connected.
Two red blinks	The card reader automatically discovered the printer and its host server, but was unable to connect to the system.	• Add and configure the card reader to the system manually.
Three red blinks	The card reader cannot connect to its configured host, the host servers might be down, or there is a network problem.	• Verify the host and network operation, then disconnect and reconnect the card reader to reset.
Four red blinks	The card reader has detected that the IP address assigned to it is already in use by another device on the network.	• Contact your IT department to identify the device with the same IP address. Change the IP address of the card reader or the conflicting device. • If no change was required to the card reader's IP address, then disconnect and reconnect the card reader to reset.

How to Resetting the Card Reader

This procedure provides the basic steps for using Maintenance Mode to recover an Ethernet Card Reader firmware.

You must reset a configured Ethernet Card Reader to its factory default settings before deleting it from the system.

1. Go to **Devices** and select the device associated with the Ethernet Card Reader.
2. Select **Configure** > **Device Details**.
3. In the **Secure release type** list, select **None** and click **Apply**.

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How to Use Maintenance Mode to Recover an Inaccessible Card Reader

This procedure provides the basic steps for using Maintenance Mode to recover an Ethernet Card Reader firmware.

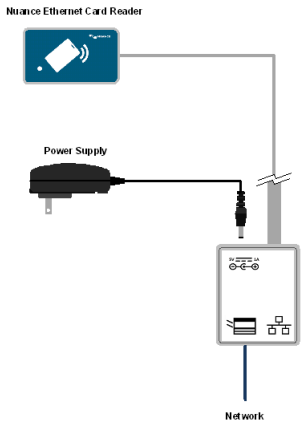
An Ethernet Card Reader might become inaccessible if there are issues with the configured card reader settings. This may occur when:

- The card reader was originally assigned to a different system.
- The card reader's network settings aren't compatible with the network.
- The card reader was deleted from the system without resetting it to its factory default settings.

Maintenance mode temporarily restores the default settings, so you can perform a factory reset and reconfigure the card reader.

To use maintenance mode to reconfigure a card reader, do the following:

1. Connect the power supply.
2. Connect the network cable to the Printer port only.
   The LED light blinks red and green.



3. *Reset the Ethernet Card Reader.*

Note: The card reader cannot be configured any further until it is taken out of maintenance mode by restoring its normal network and printer connections.

RF IDeas Ethernet 241 Card Reader

The RF IDeas Ethernet 241 Card Reader connects to a printer and securely releases documents associated with a card ID.

You can use the RF IDeas Ethernet 241 Card Reader to securely release and print documents. This card reader has two ports that connect to the Ethernet network and the printer.

When Output Manager and this card reader are properly installed and configured, a user can swipe an RFID card on the device's card reader, and any documents associated with the card ID will be released to the printer connected to the device.

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Prerequisites

This topic lists the prerequisites to using an RF IDeas Ethernet 241 Card Reader.

Before you can use the RF IDeas Ethernet 241 Card Reader, you need to complete the following:

- Purchase the RF IDeas Ethernet 241 Card Reader hardware from RFIDeas or a third-party vendor
- Purchase an Ethernet Card Reader Release for 3rd party readers license for Output Manager from Nuance
- Download the Discovery Tool and additional instructions for the Ethernet 241 Card Reader from www.rfideas.com

How to Install the RF IDeas Ethernet 241 Card Reader

This procedure provides the basic steps for connecting an RF IDeas Ethernet 241 Card Reader to a printer.

1. Connect the Ethernet cable from the network to the RF Ideas Ethernet 241 Card Reader network port.
2. Connect the Ethernet cable from the printer to the RF Ideas Ethernet 241 Card Reader device port.
3. Connect the power cube to the power connector on the RF Ideas Ethernet 241 Card Reader.
4. The card reader obtains an IP address using DHCP from the network. If your network is using DHCP, refer to the RF Ideas Ethernet 241 Card Reader documentation to configure a static address.
5. Run the Discovery Tool by clicking **241DiscoveryTool.exe** to find all the RF IDeas readers on your local network.

   Note: Use this application on the same local network where the devices are located. If you know the IP address of the device but the device isn't on the local network, you can connect to the IP address using a web browser. For more details, refer to the RF Ideas Ethernet 241 Card Reader documentation.
6. Once the card reader is discovered, open the web page on the device.
7. Select the **Server** tab on the web page.
8. In the **Data Server URL** field, type the IP address for the Output Manager server.
9. In the **Data Server Port** field, type 80.
10. Click **Update** to initialize the device with these parameters.

How to Configure Output Manager with the RF IDeas Ethernet 241 Card Reader

This procedure provides the steps for configuring Output Manager with the RF IDeas Ethernet 241 Card Reader.

You need an Ethernet Card Reader Release for 3rd party readers license for each card reader.

1. Prepare the Output Manager RF IDeas Ethernet 241 web service.
   a) From the Output Manager Console menu bar, select **Applications** > **Administration** > **Manage License** and confirm that the **Ethernet Card Reader Release for 3rd party readers** flag is displayed.

      If the license was recently added, reinstall and activate the license.
   b) From the **Administration** section, select **Set General Preferences** and click the **Clients** tab.
   c) In the **Client web server** list, select RFIDeas241Reader.
   d) In the **Server Port** field, type 80.
   e) Click the **Restart server** check box.
   f) Click **Apply**.
2. Prepare the printer connected to the RF IDeas Ethernet 241 Card Reader to process a secure document.
   a) From the Output Manager Console menu bar, select **Applications** > **Manage Devices**, and select the SNMP server row.
   b) Click **Configure**. The **SNMP Server Configuration** dialog box opens. Configure the server as required.
   c) Click **Detect readers**. The Detect Readers dialog box opens.
   d) Type the IP range that contains the printer and click **OK**.

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e) Once the device has been discovered, promote it to Output Manager and create a destination for that device.
   The destination is usually named after the device DNS name.
f) From the Output Manager Console menu bar, select **Applications** > **Destinations** and create a new group called **IE_Secure** by right-clicking on **New Group** on the All Destination group folder or subfolder.
g) Move the new destination to the **IE_Secure** group.
h) Right-click on the **IE_Secure** group and create a pending queue.
i) From the Output Manager Console menu bar, select **Tools** > **Universal PS Driver Wizard** and click the **Match with existing OM destinations** radio button to create a source to match to the new pending queue in the **IE_Secure** group.
j) Using the printer properties of the new printer device, print a Test Page.
   This document is listed in the documents of the destination pending queue as ready to print.
k) At the printer, find your RF IDeas card ID by tapping the RFIDeas Ethernet 241 reader with the card. Then check the **cns** entry in the most recent log in the C:\Program Files\NSi\Output Manager\Services\Clients \RFIDeas241Reader\Logs\...folder.
l) From the Output Manager Console menu bar, select **Applications** > **Administration** > **Manage Users** and select the user that printed the document.
m) Type the value from the cns entry to the **Card ID** cell and click **Apply**.
n) From the Output Manager Console menu bar, select **Applications** > **Devices** and right-click the device connected to the RF IDeas Ethernet 241 and click **Configure**.
o) On the **Device Details** tab, in the **Secure release type** list, select **RFIDeas241Reader**.
p) Click **Apply**.
   The test document is released when the card is swiped again at the RFIDeas Ethernet 241.

Once a document has been released and you have enough licenses, a **3rd party card reader** check box on the **Device Details** tab is automatically selected.

To release a license from this device, clear the **3rd party card reader** check box and click **Apply**. You can then use this license for another device.

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Queues and Universal Postscript Driver

Converting Windows Queues

Nuance Output Manager will often be installed in an existing print environment. This means there will already be one or more Windows print servers, each serving dozens or hundreds of Windows queues. You can easily use the Nuance Output Manager Device Wizard to convert these Windows queues to Nuance Output Manager sources. All documents sent to the converted Windows queue will be automatically received in Nuance Output Manager through the new source.

You can choose to create a Nuance Output Manager destination for the queue. Nuance Output Manager will automatically configure the source to route to the destination. This is useful because no change will appear to the end users, and they will continue print and receive their documents as usual.

- *Convert Windows queues*
- *Convert Windows queues (advanced mode)*

The difference between converting queues in basic and advanced mode amounts to granularity of controlling options.

In basic mode:

- The options to create sources and/or destinations apply to all converted queues the same.
- The optional destination will be a Socket type destination only.
- The source and destination group selections will apply to all new sources and destinations.
- File store selection will apply to all new sources the same.

In advanced mode:

- The option to create a sources and/or destination is chosen per device to convert.
- The optional destinations can be of type Socket: IPP or LPR.
- The source and destination group selections are chosen per device to be converted.
- File store selection is made per source to be created.

If you decide you no longer want the Windows queue routed through Nuance Output Manager, you can easily restore the Windows queue.

- *Restore Windows queues*

How to Convert Windows Queues

Complete this procedure to convert existing Windows queues to Nuance Output Manager sources and destinations.

1. In the Output Manager Console, click **Tools** > **Device Wizard**.
2. Select **Convert Windows Queues on one or more Print Servers**.
3. On the **Print Server Selection** page, select the servers that contain the Windows queues you want to convert., then click **Next**.

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Only servers with the Nuance Output Manager Input Service running will be listed in the grid. If the server you want is not listed, run the Nuance Output Manager Input Service on that server and try again.

4. On the **Conversion Method** page, select the conversion method you want to use.

Conversion method	Description
Complete Conversion (recommended)	Creates both a new Nuance Output Manager source and Nuance Output Manager destination on the chosen print servers for each detected Windows queue.
Sources Only	Creates only a new Nuance Output Manager source on the chosen print servers for each detected Windows queue.
Destinations Only	Creates only a new Nuance Output Manager destination on the chosen print servers for each detected Windows queue. This will create a single Nuance Output Manager destination when multiple printers/ports share the same IP address and queue name or port number.

5. On the **File Store and Groups** page, configure the grid as necessary, and when finished, click **Next**.
   a) Select the **File Store** to be associated with the new source.
      All file stores defined in the **Set General Preferences Utility** are displayed.
   b) Choose the **Source Group** where the new source will be created.
      The new source will use the same name as the Windows queue.
   c) Choose the **Destination Group** where the new destination will be created.
      The new destination will use the same name as the Windows queue.

   Depending on the conversion method selected, columns will display for source and/or destination configuration.
6. On the **Windows Queues** page, in the **Convert** column, select **Convert** for the Windows queues you want to convert, then click **Next**.
   This grid displays all of the Windows queues found on the selected server that are using one of the following Windows ports: LPR port, Standard TCP/IP port, HP Standard TCP/IP port, or SC2 TCP/IP port.
7. You can use the **Destination Name** column to build the name to use for the new destination.
   In this column, you can type to edit the content, you can right-click and use the context menu to add variables, or you can use a combination of typing and right-clicking to build the name.
8. You can edit the **Location** and **Comment** columns as needed. These values will show up in the new source and destination in Nuance Output Manager .
9. On the **Confirmation of Action** page, click **Convert** to convert the Windows queues.
   When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**.
10. Click **Finish**.

How to Convert Windows Queues (Advanced Mode)

Complete this procedure to covert existing Windows queues to Nuance Output Manager sources and destinations using advanced mode.

1. In the Output Manager Console, click **Tools** > **Device Wizard**.
2. Select **Convert Windows Queues on one or more Print Servers** and **Advanced mode**.

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3. On the **Print Server Selection** page, select the Server that contains the Windows queues you want to convert, then click **Next**.

   Only servers with the Nuance Output Manager Input Service running will be listed in the grid. If the server you want is not listed, start/install the Nuance Output Manager Input Service on that server and try again.
4. On the **Windows Queues** page, configure the grid as necessary, and when finished, click **Next**.

   You can choose to create a source and/or destination for each queue.

   - If you select **Create Source**, select **File Store** and **Source Group** to be associated with the new source.

     All file stores defined in the **Set General Preferences Utility** are displayed. The new source will use the same name as the Windows queue.
   - If you select **Create Destination**, select the **Destination Server**, **Destination Type**, and **Destination Group**.

     The new destination will use the same name as the Windows queue. However, the **Destination Name** column can be used to build the name to use for the new destination. To build the name, you can type in the box, right-click to use the context menu to insert variables, or use a combination of both typing and right-clicking.
   - You can edit the **Location** and **Comment** columns as needed. These values will show up in the new source and destination in Output Manager.
   - By default, the **Create single destination for multiple queues when possible** check box is selected.

     This will create a single Nuance Output Manager destination when multiple printers/ports share the same IP address and queue name or port number. If this is not selected, new Nuance Output Manager destinations are created for each queue converted.
5. On the **Confirmation of Action** page, click **Convert** to convert the Windows queues.
   When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**
6. Click **Finish**.

How to Restore Windows Queues

Complete this procedure to restore converted Windows queues.

1. From the Output Manager Console, select **Tools** > **Device Wizard**.
2. Select **Restore previously converted Windows Queues** and click **Next**.
3. On the **Print Server Selection** page, select the server that contains the converted queues, then click **Next**.

   Only servers running the Nuance Output Manager Input Service will be listed in the grid. If the server you want is not listed, start the Nuance Output Manager Input Service on that server and try again.
4. On the **Restore Windows Queues** page, select the Windows queues you want to restore and click **Next**.

   All of the converted Windows queues for the selected server are listed in the grid.
5. On the **Confirmation of Action** page, click **Restore** to restore the selected Windows queues.
   When the conversion is complete, the **Device Wizard Log** dialog box displays. You can save the log file by clicking **Save**.
6. Click **Finish**.

Universal Postscript Driver

The NSi Universal PostScript Driver is a Windows printer driver that allows users to print documents to Output Manager (OM) and output them to any supported PostScript printer serviced by OM, regardless of the printer's

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manufacturer or model.This eliminates the need to install different printer drivers for every make and model of printer in your network, and allows for advanced features such as dynamic routing, pull printing, and failover printing.

The driver is part of our universal printing concept and works by rendering the job at print time, after the destination has been selected. When the user prints a document, the driver creates a generic PostScript representation of the document and sends it, along with information about how the document should be printed, to OM for processing. Once the document arrives in OM, it can be processed using all of the normal features built into OM, and can routed to a particular destination using any of the usual methods (static routing, dynamic routing, pull printing, etc.) When the document is routed to a specific printer, the generic data and printing options are converted to printer specific commands that print the document correctly on the target printer. This allows the same document to be printed on any supported PostScript printer serviced by OM.

The driver supports x86 and x64 clients running Windows XP SP3 and higher, and provides printing options common to most model specific printer drivers. The driver is multilingual and supports English, Danish, Dutch, French, German, Italian, Portuguese, Norwegian, Spanish, and Swedish. The driver's user interface dynamically adjusts to the appropriate language based on the user's language settings Windows, and support multiple languages simultaneously on the same server or client system without having to install different drivers or language packs.

The NSi Universal PostScript Driver is installed with the Output Manager Input Service, and is typically used in a shared printing environment. After setting up the shared printer, network users with appropriate rights simply connect to the shared printer, and are able to print. The Point-And-Print features supported by the driver automatically install the necessary driver files on the client system.

How to use the NSi Universal Postscript Driver

To use the driver, perform the following steps.

1. Install the Input Service on your network print server.
2. Create a shared printer using the NSi Universal PostScript Driver and NSi Job Monitor Port.

   Note: These steps may vary slightly by operating system.

   a) Open **Devices And Printers**.

      Note: Until a Windows Queue source has been created for this printer, the port is unable to send data to OM. Therefore, the Print Test Page feature will now work until after the Windows Queue source has been setup.

   b) Click **Add a printer**.
   c) Click **Add a local or network printer**.
   d) Click **Create a new port**, select NSi Job Monitor from the drop down, and click **Next**.
   e) Enter a name for the port and click **OK**.
   f) Select Notable Solutions, Inc. in the manufacturers list, select NSi Universal PostScript Driver in the printers list, and click **Next**.
   g) Select **Use the driver that is currently installed** and click **Next**.
   h) Enter a name for the printer and click **Next**.
   i) Choose **Share this printer**, set shared name (usually the same as the printer name), and click Next.
   j) Click Finish.
3. Create a Windows Queue source in Output Manager to receive documents printed through the driver.

   See *Receiving documents from a Windows queue*.
4. Create an Output Manager destination to output to the target printer.

   See *Sending Documents to an IPDS Printer*.

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Note: Alternately, the Universal PS Driver Wizard can be used to create printers with the driver, or convert existing printers to use the driver. For more information, see *Universal PS Driver Wizard*.

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Security

Output Manager Security

Output Manager security provides the ability to control access to resources.

Output Manager provides three types of security to control access:

Category	Description
Document Ownership	Grants users access to the documents they own. By defau lt, users have full access to their documents, but no acces s to other resources.
Security Roles	Grant global access to Output Manager resources. The S ystem Administrators Role has all permissions by default . No user has any access to Output Manager until users o r groups are assigned this role during installation through the OM Server Configuration utility.
Configured Security	Provides a means for administrators to grant access to sp ecific resources such as Documents, Sources, Destination s, Devices, and Reports.

Once security is configured, access control can be enforced immediately.

Document ownership

Document ownership is a special security role that grants users access to the documents they own. By default, users have full access to their documents, but no access to other resources.

Document ownership is established by relating an Output Manager user with an Output Manager document. The permissions granted automatically to document owners can be modified through the role manager (See *Security Roles*).

Document Ownership

Document ownership is established through two mechanisms:

Automatic

Some types of Output Manager sources assign the correct user as the owner of the document automatically. Here are a few examples:

- When using Windows print queues to send documents to Output Manager, the source assigns the domain user who sent the document as the document owner.
- LPD sources will attempt to match the user in the control file with an Output Manager user account.

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- Network Folder sources are always going to use the Input service account as the document owner, which will normally not be helpful.

Business Rules

When document owner security is necessary and the automatic document owner is not correct, a business rule must be used to correct the document owner. There are a variety of business rules designed to extract metadata from a document, and an extensive business rule that will use document metadata to assign the document owner (see Business Rules).

Note: Document Owner assignment is also required for pull printing or secure release, since the user will be choosing from the documents he/she owns

Document Owner Permissions

The permissions granted to the document owner can be modified through the Document Owner role with the Role Manager dialog (see Security Roles).

Security Roles

Administrators use Role Manager to add users and groups to roles and to modify the permissions associated with roles.

There are three roles defined in Output Manager:

Document owner

This role the rights of document owners. You can limit or extend the permissions of document owners as needed. For example, an administrator who wants to prohibit document owners from assigning documents to destinations could remove this permission. This role is limited to Documents and Library applications. This role is different in that users/groups are not assigned this role. The Document Owner role intrinsically applies to any user and his/her owned documents.

System administrator

Members of this role by default have access to all aspects of Output Manager. You may only rarely need to modify the permissions associated with the System Administrators role. When you are installing Output Manager, you can use the Output Manager Server Configuration Utility to assign users and groups to the System Administrators role. You can modify the users/groups and permissions as needed using Role Manager. Some permissions cannot be removed from this role to guard against accidentally locking administrators and everyone else out of Output Manager.

Security administrator

This optional role is identical to the System Administrators role except that the permissions

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associated with configuring security cannot be removed. This role is only used when an organization wants to configure security outside of general system administration.

How to add or remove users and groups in roles

Follow the steps in this procedure to add or remove users and groups in roles.

You can use either the **Role Manager** or the **Output Manager Server Configuration Utility** to configure members in a role.

- To add users or groups to a role using the **Output Manager Console**, click **Tools** > **Security Roles** to open the **Role Manager** dialog box.
  a) In the **Role name** box, choose the System Administrators role.
  b) Click the **Add** button.
  c) To add a user or group to Output Manager, click **More Users**.
- To add users or groups using the **Output Manager Server Configuration Utility**, click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**
  a) Click the **Output Manager security administration** tab.
  b) Click the **Connect** button to connect to the database.
  c) Use the **Add** or **Remove** button to add or remove users in the **User and Groups** list.

How to add or remove role permissions

Use the **Role Manager** to configure role permissions.

1. In the **Output Manager Console**, click **Tools** > **Security Roles** to open the **Role Manager** dialog box.
2. Next to **Role name**, click the browse button (**...**).
3. In the **Members** box, click the role that you want to manage.
4. Click the **Modify** button.
5. In the **Configure Role** dialog box, select or clear check boxes to add or remove permissions.
6. Click the **OK** button.

Configuring permissions

An administrator can grant access to specific resources such as Documents, Sources, Destinations, Devices, and Reports.

Permissions can be granted to users and/or groups directly to the using console or object permissions.

Console permissions

Console Permissions allow access to individual areas of the Output Manager Console. Console permissions grant access to the following

- The Output Manager Console
- Individual applications (Sources, Destinations, Administration, and so forth)
- Individual administrative tasks in the Administration application
- Menu items on the Tools menu

There is no inheritance in console permissions.

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Object permissions

Object permissions provide access to features and components of Output Manager.

- Destination Permissions allow access to printers or groups of printers.
- Document Permissions allow access to documents in a given document folder.
- Library Document Permissions allow access to documents in a given document library folder.
- Query Permissions allow access to document and document library queries.
- Report Permissions allow access to reports or report group folders.
- Source Permissions allow access to sources or groups of sources.

In tree and grid interfaces, an object that supports security configuration will display a **Security** command on its context menu. This opens the **Security Configuration** which has features similar Windows security, similar to the **Security** tab in the Windows folder properties dialog box. This standardized functionality helps increase familiarity of options in the dialog box.

The available permissions are specific to the type of object. For example destinations have a different list of permissions from Reports. The complete list of permissions is always in the same for a given object type. Although a list of users and user groups can be configured, a single user or user group in the list will always be selected. The enabled permissions are always in the context of the selected user or user group. A check box to the left of the permission description indicates its enabled state. Clicking on a permission toggles its enabled state. When a permission is enabled via inheritance, it displays grayed-out and control over that permission is disabled even though adjacent permissions maybe configured (see Inheritance).

Inheritance

Objects inherit permissions from their parent object unless you specify not to do so. Inherited permission are permissive. When an object inherits permissions from a parent, you can only add permissions for specified users and groups. You cannot remove inherited permissions from a user or group.

Administrators use inheritance to productively configure security. By default, when security is configured on an object hierarchy, all of the children (folders and objects) inherit that security configuration. For example, configuring security on the “All Destinations” folder in the Destinations tree will apply that security to every folder and every destination that does not block inheritance from its parent. When security is configured on any descendant object in a tree, all children of that object inherit those settings as well.

The **Security Configuration** dialog box allows you to control inheritance. An administrator can add permissions for specified objects or users or block inheritance for the object. When an administrator blocks inheritance for an object, the administrator can choose to copy permissions from the parent object into the current object and then configure those as required. Alternatively, the administrator can choose not to copy inherited permissions and configure entirely new permissions to apply to that object and any of its descendants.

Security configuration is audited in Output Manager, so it is possible to report on changes in the security configuration. For example, Audit Reports show who granted a given permission to whom and for what object.

Tip: In general it is a good practice to define permissions at the highest level folder or object possible and allow inheritance to provide access to all descendants. This allows you to more easily assign and manage permissions for many different objects. If necessary, you can add members or groups to an object to add additional permissions to those that are inherited. You should only block inheritance for an object when you need to limit access to specific groups or users.

How to configure console permissions

This procedure describes how to configure console permissions.

1. Click **Tools** > **Console Security**.

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This opens the **Security Configuration** dialog box.

2. In the **Users and groups with permissions** box, you can configure users to whom you want to assign permission.
   - To add a user or group, click the **Add**.

     This opens the **User and Group Selection** dialog box, which allows you to select from Output Manager users or add users if they are not already listed. For details selecting or adding users, click the **Help** button in this dialog box.
   - To remove a selected user or group, click the **Delete** button.

     This removes a user from the console configuration, but it does not remove the user from Output Manager.
3. To change permissions for a selected user or group, select or clear check boxes in the **Assigned permissions** box.
   - To assign all permissions, click the **Select All** button.
   - To clear all permissions, click the **Unselect All** button.
4. When you are finished, click the **OK** button.

How to configure object permissions

This procedure describes how to configure permissions for objects that support permissions.

1. Right-click the object in its application window.
2. On the shortcut menu, click **Security**.

   The **Security** command is available for any object that supports security configuration.
3. You can choose to block inheritance for the object.
   a) In the **Inherit permissions from the parent** box, click the browse button (**...**).
   This opens the **Security Configuration - Change inheritance** dialog box.
   b) In the **Inherit permissions from the parent** box, click "Do not inherit".
   c) Optional: To copy permissions from the parent object, select the **Copy inherited permissions** check box.

   Select this check box to modify rather than discard inherited permissions.
   d) Click the **OK** button.
4. In the **Users and groups with permissions** box, you can configure users to whom you want to assign permission.
   - To add a user or group, click the **Add**.

     This opens the **User and Group Selection** dialog box, which allows you to select from Output Manager users or add users if they are not already listed. For details selecting or adding users, click the **Help** button in this dialog box.
   - To remove a selected user or group, click the **Delete** button.

     This removes a user from the object, but it does not remove the user from Output Manager.
5. To change permissions for a selected user or group, select or clear check boxes in the **Assigned permissions** box.
   - To assign all permissions, click the **Select All** button.
   - To clear all permissions, click the **Unselect All** button.

   The permissions shown here depend on the type of object. Selections here add to any permissions already inherited from the parent object. Clearing or not selecting a check box in the **Assigned permissions** box does not remove an inherited permission.
6. When you are finished, click the **OK** button.

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Security enforcement

A security enforcement cache object is instantiated by any user interface as it initializes. Most user interfaces can determine when the security configuration has changed, and update their security enforcement cache. Consequently, security changes commonly take effect immediately.

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Sources

Learning About the Sources application

Use the **Sources** application is to manage and monitor sources. Sources receive data into Nuance Output Manager. The navigation pane displays a configurable **Sources** tree showing all sources. You can drag-and-drop to move sources into source groups.

The console window displays a tabbed view of the Source tree selection. When a source is selected in the tree, a source home page will display showing the properties and the status of the source. When a source group (folder) is selected in the tree, the **Sources** grid lists all of the sources in the group. The **Sources** grid is in a tab page control. By default, navigating in the tree will replace the information in the active tab. To open a source or group in new tab, right-click the item in the tree and click **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

By default the **Documents** grid displays below the **Sources** grid. There are two tabs below the grid, **Spooled** and **Retained**. The **Spooled** tab lists all of the documents currently received by the source selected in the tree. The **Retained** tab lists all of the documents that were received by the selected source and then retained. If a group is selected, the list will contain documents for all of the sources in the group. You can switch the tabs to view either spooled or retained documents. As you select items in the tree, both of the grids will update to show only the appropriate documents.

The following table describes source states:

Source States	Descriptions	See
Enable	Allows the source to receive documents into Nuance Output Manager.	• *Enable a source*
Disable	Stops this source from receiving documents.	• *Disable a source*

How to Manage Source Groups

You can create, move, rename, and delete source groups in the Output Manager Console Sources tree.

Source groups are used to organize sources in the Sources tree. Groups are represented as folders in the tree.

- *Create a source group*
- *Move a source group*
- *Rename a source group*
- *Delete a source group*

To create a source group

1. In the Sources tree, right-click a source group (folder) and click **New Group**.
   A new group (folder) titled **UnNamed** is added to the selected source group.
2. In the edit field, type the name of the new group and press Enter.

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To move a source group

- In the Sources tree, drag the source group you want to move to the desired tree location.
  As you drag the item a yellow arrow will appear to the left of the tree to indicate where the group will be placed.

To rename a source group

1. In the Sources tree, right-click a source group and click **Rename**.
2. In the edit field, type the new group name and press Enter.
   To cancel the rename, press Esc.

To delete a source group

All of the objects must be removed before the group can be deleted.

Groups that contain sources or source groups cannot be deleted.

1. In the Sources tree, right-click the source you want to delete.
2. Click **Delete** on the shortcut menu.

How to Add Sources

Complete the following steps to add sources to the Sources application.

1. In the Sources tree, right-click the source group (folder) where you want to add sources, and click **New Source**.
   This opens the **Add Source** dialog box.
2. In the **Type** list, select the source type.
3. Next to **Add new devices** enter the number of sources you want to create.
   You can create multiple sources of the type selected and configure the sources simultaneously. The configuration tab pages that displays is different depending on whether you choose to create a single source or multiple sources.

Source	Displays
Single source configuration	Configuration options are listed on the tab pages.
Multiple source configuration	Sources are configured in grid format on each tab page.

   You will need to configure the options for each source row. You can use **Series Fill** to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog box. The series will start with the first selected row.
4. Click **OK**.
   Tab pages will display with options specific to the selected source type. The configuration options is different depending on whether you choose to create a single source or multiple sources. When configuring one source, individual options are listed on the tab pages. When configuring multiple sources, the options are listed in grid format to allow for configuring multiple sources simultaneously. You can add and remove sources by clicking **Add** and **Remove** below the grid. You can also select sources and click **Copy** to create copies
5. Configure the general settings. For multiple source configuration, this is configured on the **General** tab.
   a) Enter the source **Name**.

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b) In the **Server** list, click the Output Manager server where the Output Manager Input and Output services are located for this source.
c) Enter any **Comments** or **Location** information for the source.

6. Make the necessary changes on each tab.

   The following topics provide more information on configuring tabs for source types:

   - *How to add an AutoStore source* on page 83
   - *How to add an Email source* on page 86
   - *How to add an FTP Source* on page 95
   - *How to add an IPP Source* on page 100
   - *How to add an LPD Source* on page 103
   - *How to add a Mobile Server source* on page 104
   - *How to add a NetWeaver source* on page 108
   - *How to add a Network Folder source* on page 111
   - *How to add an Output Manager source* on page 115
   - *How to add a Socket Connection source* on page 119
   - *How to add a TCP/IP NJE source* on page 122
   - *How to add a WCF API source* on page 126
   - *How to add a Web Upload source* on page 130
   - *How to add a WebSphere MQ source* on page 133
   - *How to add a Windows Queue source* on page 137

7. Click **OK**.

How to add an AutoStore source

Complete the following steps to create AutoStore sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select AutoStore.
3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single AutoStore source or create multiple AutoStore sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.
   c) Enter any **Comments** or **Location** information for the source.
   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

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6. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) tab.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

7. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

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a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

   The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

   If you do not select this option, you can specify only the cost per page for printing.

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g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

8. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

9. Click **OK**.

How to add an Email source

Complete this procedure to create email sources. Documents received by the specified email account will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select Email.

3. Next to **Add new devices**, enter the number of sources you want to create.

You can create a single email source or create multiple email sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

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For multiple source configuration, this is configured on the **General** tab.

a) Enter the source **Name**.
b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

   The source does not have to be on the same server as the Nuance Output Manager Input Service.
c) Enter any **Comments** or **Location** information for the source.
d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

   The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the email settings.

Configuration	Method
Single source configuration	Use the **Email settings** tab.
Multiple source configuration	Use the **Email settings** (Bulk Configuration) tab.

a) Enter a valid **Email server**.

   You can click the browse button (...) to display the **Mail Server Search** dialog box and search for one on a given domain.
b) Specify the **Protocol**.

   You can select from one of the following three options:

   - IMAP4
   - POP3
   - Exchange Web Services
c) For POP3 or IMAP4, specify the **Port** number.

   Port numbers may be different based on the email application that was used to set up the email account. The default port number is 110.
d) For Exchange Web Service, specify how to discover and connect to the email server using EWS.

   Either enter an email address or specify the URI for the Exchange server.

   - **Autodiscover via an email address**
   - **Service URI**
e) Exchange
f) Choose if you want to **Use SSL** (Secure Socket Layer) when connecting using POP3 or IMAP4.

   Using SSL will encrypt the email. This option is unavailable when using Exchange Web Service, as it connects over TCP/IP.
g) Enter the **User name** that will be used when logging into the email account.

   If the email account does not require a user name, you can leave this blank.
h) Enter the **Password** that will be used when logging into the email account.

   If the email account does not require a password, you can leave this blank.
i) Specify the time **Interval** for checking the mail account for documents.

   The default value is 60 seconds.

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j) This is an optional step. To delete the email messages and their attachments from the server after they have been received by Output Manager, select the **Delete messages** check box.

This option is selected by default.

k) Select the email components to include in a separate components document that users can print. When Nuance Output Manager receives an email, Nuance Output Manager resolves its attachments into documents and creates the components document. Nuance Output Manager then creates a single package that contains all the documents from the email, the attachments, and the components document

7. Configure filters depending on the source configuration.

Configuration	Method
Single source configuration	Use the **Filters** tab. The filter column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Express Value** column. Wild card values of ? or * are accepted as long as the expression's first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
Multiple source configuration	Use the **Filters** (Bulk Configuration) tab. Sources are c onfigured in grid format on each tab page. The sources you choose to create are displayed as rows in the grids . The configuration options are listed as the column he adings.

8. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following:

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To	Do this
	• Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

9. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.

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Option	Description
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

10. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

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Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

11. Click **OK**.

How to add an EPIC Source

Complete the following steps to create EPIC sources. Documents received by this source will be routed to Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select Epic.

3. Next to **Add new devices**, enter the number of sources you want to create.

You can create a single Epic source or create multiple Epic sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

For multiple source configuration, this is configured on the **General** tab.

a) Enter the source **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

The source does not have to be on the same server as the Nuance Output Manager Input Service.

c) Enter any **Comments** or **Location** information for the source.

d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the Epic settings.

Configuration	Method
Single source configuration	Use the **Epic settings** tab.
Multiple source configuration	Use the **Epic settings** (Bulk Configuration) tab.

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a) Enter a valid **Folder**.

   You can click the browse button (**...**) to display the **Browse for Folder** dialog box and select or create a folder.

b) Select whether to **Scan Subfolders**.

c) Specify the scan **Interval** in seconds.

d) Specify the order that documents are copied to Output Manager.

   - Unspecified
   - Alphabetical
   - Time

e) For **Disposition**, specify what to do with documents in the source folder after they have been copied to Output Manager.

   - Delete
   - Leave
   - Move
   - Move/Overwrite

f) For Move or Move/Overwrite, specify the destination folder.

   You can click the browse button (**...**) to display the **Browse for Folder** dialog box and select or create a folder.

g) Specify the location of the **EPS Binaries**.

   You can click the browse button (**...**) to display the **Browse for Folder** dialog box and select the folder where EPS binaries are located.

h) Specify the location of the **EPS Incoming**.

   You can click the browse button (**...**) to display the **Browse for Folder** dialog box and select the folder where EPS scans for incoming documents.

i) You can select whether to convert ERTF formatted documents to PDF.

7. Configure filters depending on the source configuration.

Configuration	Method
Single source configuration	Use the **Filters** tab. The filter column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Express Value** column. Wild card values of ? or * are accepted as long as the expression's first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
Multiple source configuration	Use the **Filters** (Bulk Configuration) tab. Sources are c onfigured in grid format on each tab page. The sources you choose to create are displayed as rows in the grids . The configuration options are listed as the column he adings.

8. Configure the document properties that will be applied to all documents received by the source.

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Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) tab.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. 👉 **Important:** This can only be configured during single source configuration.

9. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

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a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter Output Manager .

   The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

   If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

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The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

10. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

11. Click **OK**.

How to add an FTP Source

Complete this procedure to create FTP sources. Documents received by the specified FTP server will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select FTP.

3. Next to **Add new devices** enter the number of sources you want to create.

You can create a single FTP source or create multiple FTP sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

For multiple source configuration, this is configured on the **General** tab.

a) Enter the source **Name**.

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b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

The source does not have to be on the same server as the Nuance Output Manager Input Service.

c) Enter any **Comments** or **Location** information for the source.

d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the FTP settings.

Configuration	Method
Single source configuration	Use the **FTP settings** tab.
Multiple source configuration	Use the **FTP settings** (Bulk Configuration) tab.

a) Enter a valid **FTP server**.

This can be a FTP address or IP address.

b) Enter the **Port** number on which the FTP host uses to communicate with clients.

The port number must be from 1 through 65536. The default value is 21.

c) Choose if you want to **Use passive mode**.

This determines if the host mode will be passive or active. Selecting the check box selects passive mode. Passive mode is where the client creates a session to receive data. Clearing the check box selects active mode. Active mode is where the host creates a separate or new session to transfer data in response to a request from the client.

d) Enter the **User name** that will be used when logging onto the host.

If the host does not require a user name, you can leave this blank.

e) Enter the **Password** that will be used when logging onto the host.

If the host does not require a password, you can leave this blank.

f) Enter the **FTP folder**.

This is the location on the host from where the files will be retrieved when receiving files. You must type the entire path of the folder or the path relative to the FTP user's home directory. For example, if your home directory is \FTP\UserName, you can specify either \FTP\UserName\MySourceFiles or \MySourceFiles.

g) Choose if you want to **Scan subfolders** of the specified FTP folder.

h) Choose if you want to **Remove subfolders**.

This will delete the subfolders within the FTP folder after the files have been transferred into Output Manager.

i) Specify the time **Interval** for checking the host for documents.

The default value is 60.

j) Specify the **Temp folder** location where files are transferred into during the FTP session.

When a session is complete, the files are put in the file store.

7. Configure filters depending on the source configuration.

Configuration	Method
Single source configuration	Use the **Filters** tab. The filter column lists the filter criteria.

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Configuration	Method
	You can modify the filter values by typing directly in the **Regular Express Value** column. Wild card values of ? or * are accepted as long as the expression's first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
Multiple source configuration	Use the **Filters** (Bulk Configuration) tab. Sources are c onfigured in grid format on each tab page. The sources you choose to create are displayed as rows in the grids . The configuration options are listed as the column he adings.

8. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination.

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To	Do this
	Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

9. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b

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Option	Description
	oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

10. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the

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Failover Profile dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

11. Click **OK**.

How to add an IPP Source

Complete this procedure to create IPP (Internet Printing Protocol) connection sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select IPP.
3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single IPP source or create multiple IPP sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.
   c) Enter any **Comments** or **Location** information for the source.
   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the IPP settings.

Source	Displays
Single source configuration	Use the **IPP settings** tab.
Multiple source configuration	Use the **IPP settings** (Bulk Configuration) tab.

   a) Enter the **Port** number.

      The default value is 631.
   b) Enter the **IP address** on the local system where the socket device will receive documents.

      In most cases, this can be left blank given that most systems have only one IP address. For systems that have multiple network adapters or support multiple IP addresses, the IP address entered here specifies the IP address for the appropriate port.
   c) Enter the **Instance name**.

      This identifies the source address and extends the connection URL.
7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.

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Configuration	Method
Multiple source configuration	Use the **Document properties** (Bulk Configuration) tab.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

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b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.

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- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add an LPD Source

Complete this procedure to create LPD connection sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select **LPD**.
3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single LPD source or create multiple LPD sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

   The source does not have to be on the same server as the Nuance Output Manager Input Service.

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c) Enter any **Comments** or **Location** information for the source.

d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the LPD settings.

Configuration	Method
Single source configuration	Use the **LPD settings** tab.
Multiple source configuration	Use the **LPD settings** (Bulk Configuration) tab.

a) Enter the **Port** number for the host.

The default value is 515.

b) Enter the **IP address** for the host.

c) In the **Default queue** list, click the queue which will process all requests made to unrecognized queues.

All defined LPD queues are listed.

d) Specify the **Temp folder** location where files are transferred into during the LPD session.

When a session is complete, the files are put in the file store.

7. Configure the LPD queues.

The **LPD queues** table lists all defined LPD queues. Select or clear check boxes in the **Enabled** column to enable or disable the LPD queues. To create a new LPD queue, click **Add** and complete the following steps from the **LPD queue settings** tab.

For multiple source configuration, this is configured by clicking on the browse button **...**.

a) Specify the **Queue name**.

b) Determine the selections for the following check box options:

Option	Description
Enabled	Determines if the queue is available to receive docum ents. This option is selected by default.
Allow Restart	Accepts or rejects the restart command to reset a parti cular queue. This option is selected by default.
Allow LPQ	Determines if the LPQ command line can be used to view the print queue for your current login name.
Allow LPRM	Determines if the LPRM command line can be used t o remove files in the print queue that were submitted under your current login name.

How to add a Mobile Server source

Complete this procedure to create Mobile Server sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

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2. In the **Type** list, select Mobile Server.
3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single Mobile Server source or create multiple Mobile Server sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.
   c) Enter any **Comments** or **Location** information for the source.
   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines

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To	Do this
	the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

7. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.

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Option	Description
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

8. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the

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Process Designer. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

9. Click **OK**.

How to add a NetWeaver source

Complete this procedure to create NetWeaver sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select NetWeaver.
3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single NetWeaver source or create multiple NetWeaver sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

   The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

   The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile

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To	Do this
	list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

7. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

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Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

   The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

   If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

   The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

   - To create a profile during single source configuration, click **New**.
   - To create during multiple source configuration, click the browse button (**...**).

8. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.

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Configuration	Method
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

   You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

   Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

9. Click **OK**.

How to add a Network Folder source

Complete this procedure to create network folder sources. Documents received by the specified network folder will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select Network Folder.

3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single network folder or create multiple network folders and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

a) Enter the source **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

   The source does not have to be on the same server as the Nuance Output Manager Input Service.

c) Enter any **Comments** or **Location** information for the source.

d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

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The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the network folder settings.

Source	Displays
Single source configuration	Use the **Folder settings** tab.
Multiple source configuration	Use the **Folder settings** (Bulk Configuration) tab.

a) Specify the **Folder** to be monitored.

Enter the path of the network folder. For the specified folder, you must configure the Output Manager Service logon account user name to have **Full Control** sharing permissions. Also, verify that the **Administrators** group has **Full Control** security permissions. Right-click the folder and click **Sharing and Security** to configure these options.

b) Select the **Scan subfolders** check box to specify that the subfolders must be scanned.

c) Specify the **Interval** for checking the folder for files.

d) From the **Order** drop-down list box, specify the order in which Nuance Output Manager receives files from the network folder.

e) Select the **Disposition**.

This will determine what will happen to the original file after it is sent to the Output Manager Console. You can choose to **Delete**, **Leave**, **Move** or **Move/Overwrite**.

f) If you selected **Move** or **Move/Overwrite** as the file **Disposition**, in the **Move to** field, enter the folder path where the file will be moved.

7. Configure filters depending on the source configuration.

Configuration	Method
Single source configuration	Use the **Filters** tab. The filter column lists the filter criteria. You can modify the filter values by typing directly in the **Regular Express Value** column. Wild card values of ? or * are accepted as long as the expression's first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source. Click **Regular Expression Tester** to verify the expression syntax is valid.
Multiple source configuration	Use the **Filters** (Bulk Configuration) tab. Sources are c onfigured in grid format on each tab page. The sources you choose to create are displayed as rows in the grids . The configuration options are listed as the column he adings.

8. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.

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Configuration	Method
Multiple source configuration	Use the **Document properties** (Bulk Configuration) tab.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

9. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

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b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.

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- To create during multiple source configuration, click the browse button (**...**).

10. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

11. Click **OK**.

How to add an Output Manager source

Complete this procedure to create Nuance Output Manager sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select OM.

3. Next to **Add new devices**, enter the number of sources you want to create.

You can create a single Nuance Output Manager source or create multiple Nuance Output Manager sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

For multiple source configuration, this is configured on the **General** tab.

a) Enter the source **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

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The source does not have to be on the same server as the Nuance Output Manager Input Service.

c) Enter any **Comments** or **Location** information for the source.

d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value.

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To	Do this
	Important: This can only be configured during single source configuration.

7. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

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d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

8. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

9. Click **OK**.

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How to add a Socket Connection source

Complete this procedure to create socket sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select Socket.
3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single socket source or create multiple socket sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the socket settings.

Source	Displays
Single source configuration	Use the **Socket settings** tab.
Multiple source configuration	Use the **Socket settings** (Bulk Configuration) tab.

   a) Enter the **Port**number.

      The default value is 9100.

   b) Enter the **IP address** of the local system where the socket device will receive documents.

      In most cases, this can be left blank given that most systems have only one IP address. For systems that have multiple network adapters or support multiple IP addresses, the IP address entered here specifies the IP address for the appropriate port.

   c) Choose if you want to enable **Support PJL status readback**.

      This enables the socket source to emulate two-way printer communications. The print job sender can send PJL commands that prompt a printer to respond with status information. And if it expects a response, it may wait until that response arrives before continuing with the job.
7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

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Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. 👉 **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

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c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

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Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

   You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

   Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add a TCP/IP NJE source

Complete this procedure to create TCP/IP NJE sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select TCP/IP NJE.

3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single TCP/IP NJE source or create multiple TCP/IP NJE sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

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d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the TCP/IP NJE settings.

Source	Displays
Single source configuration	Use the **TCP/IP NJE settings** tab.
Multiple source configuration	Use the **TCP/IP NJE settings** (Bulk Configuration) ta b.

a) Enter the **Host node name** of the host to which you will connect.
b) Select the **Host type** of the spool system on the mainframe.
c) Optional step. Enter the **Host password** and **Confirm password** if required.
d) Select the **Host codepage** that corresponds to the character set used by the host.
e) Optional step. Enter the **IP address** of the host.
f) Enter the **Port** number.

The default value is 175.

g) Enter the **Local node name**.

This must correspond to a remote node defined on the host.

h) Enter the **Connect Interval** in minutes.

This is the time interval used before attempting to reconnect.

i) Optional step. Enter the **Local password** and **Confirm password**.
j) Select the **Local codepage**.
k) Enter the number of **SYSIN Receivers** and **SYSOUT Receivers**.

This value should correspond to the settings for JTNUM and STNUM on the host.

l) Check **Multiple streams per buffer** to allow buffers to contain data on different streams.
m) Check **Multiple headers per buffers** to allow buffers to contain more than one header.
n) Check **Package by output group** to assign documents into separate packages by output group.

7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile.

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To	Do this
	To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect**

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Option	Description
	color, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

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You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

   Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add a WCF API source

Complete this procedure to create WCF API sources.

Documents received by this source will be routed to Nuance Output Manager.

The WCF API source type allows programs to submit documents using the WCF interface to specify the file path and document metadata.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select WCF API.
3. Next to **Add new devices** enter the number of sources you want to create.

   You can create a single WCF API source or create multiple WCF API sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

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6. Configure the WCF API settings.

Source	Displays
Single source configuration	Use the **WCF API settings** tab.
Multiple source configuration	Use the **WCF API settings** (Bulk Configuration) tab.

a) Enter the **Port** number.

The default value is 631.

b) Enter the **IP address** on the local system where the socket device will receive documents.

In most cases, this can be left blank given that most systems have only one IP address. For systems that have multiple network adapters or support multiple IP addresses, the IP address entered here specifies the IP address for the appropriate port.

c) Enter the **Instance name**.

This identifies the source address and extends the connection URL.

7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be

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To	Do this
	applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.

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Option	Description
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

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Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add a Web Upload source

Complete this procedure to create web upload sources. Documents placed in the source created by this procedure will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.
2. In the **Type** list, select Web Upload.
3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single web upload source or create multiple web upload sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

   The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

   The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the Web upload settings.

Source	Displays
Single source configuration	Use the **Web upload settings** tab.
Multiple source configuration	Use the **Web upload settings** (Bulk Configuration) tab .

   a) Select the **Web server**.

   The list displays all of the web servers available to the selected Output Manager server.

   b) Select the **Source Capabilities Profile**.

To	Do this
Select an existing profile.	Click the arrow.
Create and manage profiles.	Click the browse button (...) to open the **Manage Source Properties Profiles** dialog box.

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This specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile.

7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

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Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

   This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

   This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

   Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

   The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

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e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add a WebSphere MQ source

Complete this procedure to create WebSphere MQ sources. This source will receive WebSphere MQ messages.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

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2. In the **Type** list, select WebSphere MQ.
3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single WebSphere MQ source or create multiple WebSphere MQ sources and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.
   c) Enter any **Comments** or **Location** information for the source.
   d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the WebSphere MQ settings.

Source	Displays
Single source configuration	Use the **WebSphere MQ settings** tab.
Multiple source configuration	Use the **WebSphere MQ settings** (Bulk Configuration) tab.

   a) Enter the **Queue manager** name.

      This must match the queue manager specified in WebSphere MQ.
   b) Enter the **Queue name** where received messages will be stored.

      This must match the queue name specified in WebSphere MQ.
   c) Enter the **Channel name** for the channel configured for TCP/IP.

      You can get this name from the WebSphere MQ list of channels.

      Warning: Make sure the **SSL certificate required** option is not selected in WebSphere MQ. Output Manager does not support this at this time.
   d) In the **Connection name** field, enter the IP address and port number or DNS name for the server to which you are attempting to connect.

      Messages are transferred over the connection and placed in the queue.
7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

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Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following: • Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. 👉 **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

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c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by this source.
Detect data type	Detects the data type on all documents received by this source. The data type will display in the Documents grid **Data Type** column.
Detect trays	Determines the document paper tray that will print the document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source contain color. The Documents grid **Color** column displays True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on both sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

- To create a profile during single source configuration, click **New**.
- To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

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Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

   You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

   Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to add a Windows Queue source

Complete this procedure to create Windows queue sources. Documents received by this source will be routed to Nuance Output Manager.

1. In the **Sources** tree, right-click the source group (folder) where you want to add sources and click **New Source**. This opens the **Add Source** dialog box.

2. In the **Type** list, select Windows Queue.

3. Next to **Add new devices**, enter the number of sources you want to create.

   You can create a single Windows Queue source or create multiple Windows Queue sources and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

   For multiple source configuration, this is configured on the **General** tab.

   a) Enter the source **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source.

      The source does not have to be on the same server as the Nuance Output Manager Input Service.

   c) Enter any **Comments** or **Location** information for the source.

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d) Optional: To change the large source image that displays when configuring a single source, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the Windows queue settings.

Source	Displays
Single source configuration	Use the **Windows queue settings** tab.
Multiple source configuration	Use the **Windows queue settings** (Bulk Configuration) tab.

a) Select the **Converted queue**.

The list displays all of the Windows printers that are using the Output Manager Port Monitor but do not have a source created and associated with it. Once a source has been created and associated, those printers will no longer be displayed in the list.

b) Select the **Source Capabilities Profile**.

To	Do this
Select an existing profile.	Click the arrow.
Create and manage profiles.	Click the browse button (...) to open the **Manage Source Properties Profiles** dialog box.

This specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile.

7. Configure the document properties that will be applied to all documents received by the source.

Configuration	Method
Single source configuration	Use the **Document properties** tab.
Multiple source configuration	Use the **Document properties** (Bulk Configuration) ta b.

Determine if you want to use advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. This is a complex feature that only advanced users and professional service engineers should configure.

To	Do this
Use advanced document properties	Select **Use advanced document properties**. This enables the advanced document properties profile list. Select the default profile or an existing profile. To configure document profiles, see the *Configuring document property profiles* topic.
Not use advanced document properties	If you do not want to use advanced document properties, leave the check box disabled and configure the following:

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To	Do this
	• Select the **Document owner**. This user will be the owner of all documents received using this source. Click the browse button (**...**) to select a user. • Configure the document properties by entering property values directly in the grid. All of the available property values are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. The first node level in the category determines the print preferences for the properties it contains. On the print preference node, click in the **Mode** column and configure how the property should be applied when a document is sent to a destination. Select **Always Apply** to always apply the specified property value. Select **Informational Only** to use the value for informational purposes only. In the **Value** column, click in the grid cell to specify the document property value. **Important:** This can only be configured during single source configuration.

8. Configure the following configuration settings.

Configuration	Method
Single source configuration	Use the **More settings** tab.
Multiple source configuration	Use the **More settings** (Bulk Configuration) tab.

a) Determine if you want all documents received by this source to be in the **Hold** state as they enter the Output Manager Console.

This option is disabled by default.

b) Determine if you want to disable business rule processing for all documents received by this source as they enter the Output Manager Console.

This option is disabled by default.

c) Use the following options to determine if you want to analyze documents as they are received by a source and enter the Output Manager Console.

Selecting these options may cause performance degradation. These options are disabled by default.

Option	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. Wh en this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.
Count pages	Performs a page count on all documents received by t his source.

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Option	Description
Detect data type	Detects the data type on all documents received by th is source. The data type will display in the Document s grid **Data Type** column.
Detect trays	Determines the document paper tray that will print th e document. This will display in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Admi nistration **Configure Document Properties Utility**.
Detect color	Detects if the documents received by this source cont ain color. The Documents grid **Color** column display s True or False depending if color is detected.
Detect duplex	Detects if the documents received by this source are configured for duplex printing (that is, printing on b oth sides of the paper). The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

d) Select the file store that will be used for all documents received by this source as they enter the Output Manager Console.

   The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

e) Assign a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

f) To create profiles and enter costs associated with printing, select the **Advanced Costing Profiles** check box.

   If you do not select this option, you can specify only the cost per page for printing.

g) Determine if you want to send a notification when a document arrives, prints successfully, prints on failover destination, or is in error state.

   The notification can be sent as an email message or pop-up. You can select an existing profile in the list or create one from the **Notification Profile** dialog box.

   - To create a profile during single source configuration, click **New**.
   - To create during multiple source configuration, click the browse button (**...**).

9. Configure the following output settings.

Configuration	Method
Single source configuration	Use the **Output settings** tab.
Multiple source configuration	Use the **Output settings** (Bulk Configuration) tab.

a) Use the **Schedule output** option to specify the date and time all documents received by this source will print.

   You can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

b) Use the **Route to destination** option to specify a destination where all documents received by this source can be routed.

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Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

c) To override the default retain settings for all documents received by this source select the **Override default retain settings** check box and configure the retain options as necessary.

d) Select the appropriate output process.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an existing process in the list or create one using the **Process Designer**. To create a process during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

e) Select the appropriate failover profile.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select an existing profile in the list or create one from the **Failover Profile** dialog box. To create a profile during single source configuration, click **New**. To create during multiple source configuration, click the browse button (**...**).

10. Click **OK**.

How to Modify Sources

Complete the steps in this procedure to modify sources in the Sources application.

1. In the Sources tree, do either of the following:

- Right-click the source you want to modify and click **Configure**.
- Right-click a source in the grid view and click **Configure**.

2. In the **Configuration** dialog box, make the necessary changes.

The configuration options available vary based on the type of source selected.

3. Click OK

How to Remove Sources

Complete this procedure to remove sources from the Sources application.

1. In the **Sources** tree, right-click the source you want to delete.

2. Click **Delete** on the shortcut menu.

How to Import Sources

Use the following procedure to import a list of sources into Nuance Output Manager. Importing sources is particularly useful if you have a database or spreadsheet that lists your existing equipment. You can save that document as a CSV file and then import it to create matching sources in Nuance Output Manager.

Before you begin, review the following information on configuring/importing CSV files:

- In the CSV file, the header record (first record) determines which fields are defined. You must configure the field names in the header record to match predefined Nuance Output Manager names. Field names that match are used to populate the settings associated with that column. Field names that do not match are ignore. Contact Nuance Support for the list of predefined Nuance Output Manager names.

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- Each record after the header record is created as a device. The device will contain the settings from the recognized columns for that record. Nuance Output Manager interprets values for text and numeric settings. For settings that have a fixed list of options, Nuance Output Manager matches the value to the name of the option. Values which are not recognized, out of bounds, or otherwise invalid are replaced with the default value for that setting.
- Not all settings can be specified through the CSV file. For example, the input/output server, users, destinations, and profiles cannot be imported.
- A single CSV file can be used to generate multiple device types, sources, and destinations. Nuance Output Manager only imports the settings which are recognized by the device type you are creating. For example, the CSV file can contain settings that are common to all devices types, settings for a particular device type, or settings for several different device types.

Complete the following steps to import sources from a CSV file.

1. From the Sources tree, right-click a source group (folder) and click **New Source**. The new sources will be created in this group.
2. From the **Add Source** dialog box, select the source type.
3. Select **Import devices from configuration (.csv) file**.
4. In the box, enter the path and file name of the configuration file or click the Browse (**...**) button to navigate to the file.
5. When the configuration file is selected, click **OK**.
   This displays tab pages with options specific to the selected source type.
6. Make the necessary changes on each tab.

   The following topics provide more information on configuring tabs for source types:

   - *How to add an AutoStore source* on page 83
   - *How to add an Email source* on page 86
   - *How to add an FTP Source* on page 95
   - *How to add an IPP Source* on page 100
   - *How to add an LPD Source* on page 103
   - *How to add a Mobile Server source* on page 104
   - *How to add a NetWeaver source* on page 108
   - *How to add a Network Folder source* on page 111
   - *How to add an Output Manager source* on page 115
   - *How to add a Socket Connection source* on page 119
   - *How to add a TCP/IP NJE source* on page 122
   - *How to add a WCF API source* on page 126
   - *How to add a Web Upload source* on page 130
   - *How to add a WebSphere MQ source* on page 133
   - *How to add a Windows Queue source* on page 137

How to Search for Sources

You can search for sources from the Sources tree and Sources grid.

- You can search for sources from the **Destinations** tree or the **Destinations** grid.

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To search from the:	Do this
Destinations tree	• In the **Search** box below the tree, type the text you want to find and press Enter or click the search button.
Destinations grid	• In the **Search** box below the grid, type the text you want to find, click the column in the grid you want to search, and press Enter or click the Search image.

If the text is found, the focus will move to the first occurrence. New buttons appear near the **Search** box that allow you to move to the previous or next occurrence.

How to Configure Security for Sources

Follow steps in this procedure to configure permissions to sources for users or groups.

To begin configuring source security, start by assigning the desired source permissions for the All Sources group. To view sources in the tree, users or user groups must be assigned the **Allow user to view the Source** permission in the **All Sources** group. Users not assigned this permission in the **All Sources** group will not see any sources or groups even though they may have been given permissions for the specific source or group.

Nuance Output Manager security for the Sources application begins at the root of the Sources tree, the All Sources group. The Sources tree consists of sources and source groups. A source is an input into Nuance Output Manager. A source group is a way to organize sources. Nuance Output Manager security is provided for both by adding a Microsoft Windows user or user group to the source or source group and assigning permissions to that user or user group. These Nuance Output Manager permissions define the type of access users and user groups have to the sources and source groups. Once the Nuance Output Manager security (Microsoft Windows users, user groups, and source permissions) is set in a source group, the Nuance Output Manager security is inherited by all the objects in that source group. When a new source or source group is created, its security is automatically the same as its parent source group's security (that is, the new source inherits its security from its parent source group).

1. In the Output Manager Console, select the **Sources** application in the navigation pane.
2. In the **Sources** tree, right-click a source or source group and click **Security**.

   To perform this step, a user must be a member of the local Administrators group or be assigned the **Allow user to modify the Source's security configuration** permission. Users with this permission can add and remove users or groups and modify assigned permissions.

   Completing this step opens the **Security Configuration** dialog box. To access this dialog box,

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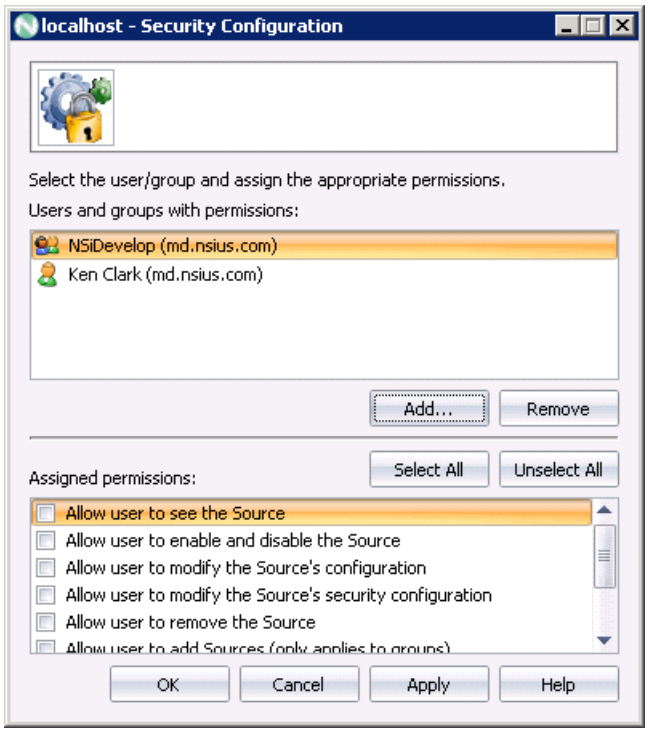

3. Use the **Inherit permissions from the parent** option to inherit permissions from a parent group or to remove inheritance.

   - Click the browse button (**...**) to select a new parent group for inheritance or to remove inheritance.

   By default, sources are configured to inherit permissions from the parent folder.

   Tip: It is a recommended practice to assign rights using inheritance, as it allows administrators to easily assign and manage permissions. Blocking inheritance is useful when a source or source group needs to be seen by just a few users. If you plan to block inheritance, make sure the users that need access to the blocked source or group are in the security settings for all of its parent groups, including All Sources. If this is not done then those users will not be able to see the source. Also remember to remove the users and user groups that should not have access to the source or group.

4. In the **Users and groups with permissions** box, select a user or group to manage.

   - If a group or user does not appear in the list, click **Add** to open the **User and Group Selection** dialog box. See *Adding users and groups to Nuance Output Manager* for detailed procedures on adding users.

   The **Assigned permissions** list box displays permissions that are currently granted to the selected user or group.

5. In the **Assigned permissions** box, select or clear check boxes to grant or revoke permissions for the selected user or group.

   - You can click **Select All** or **Unselect All** to quickly grant or revoke all permissions.

   The permissions assigned to a source group will be inherited for all of the objects contained in that group, except for the ones that have inheritance blocked.

   If you notice permissions that are selected and disabled, then the user/group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first block inheritance for the source.

6. When you are finished configuring security, click **OK** to save your changes.

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Managing Sources

Documents are received into Nuance Output Manager using Sources. Once received into Nuance Output Manager, documents are then routed to destinations. You can control sources from the Output Manager Console using the following procedures.

- *Enable a source*
- *Disable a source*
- *Open a source*
- *Move a source*
- *Rename a source*
- *Copy a source*
- *View all messages for a source*

How to Enable a Source

Perform this procedure to enable a source.

- Use one of the following methods to enable a source in the Output Manager Console.
  - From the Sources grid, right-click a source and click **Enable**.
  - From the Sources tree, right-click a source and click **Enable**.

How to Disable a Source

- Use one of the following methods to disable a source in the Output Manager Console.
  - In the Sources grid, right-click a source and click **Disable**.
  - In the Sources tree, right-click a source and click **Disable**.

How to Open a Source

Perform one of the methods this procedure to open a source in the current tab or in a new tab.

- Use one of the following methods to open a source in the Output Manager Console.
  - From the Sources tree, click a source to open it in the current tab.
  - From the Sources tree, right-click a source and click **Open** to open it in the current tab.
  - From the Sources tree, right-click a source and click **Open in New Tab** to open it in a new tab.

How to Move a Source

Complete this procedure to move a source in the Output Manager Console.

Sources can be organized into source groups. Once groups are created, sources and groups can be easily moved in the tree as necessary.

1. From the Sources tree, select the source or source group you want to move.
2. Drag the source or group to the desired tree location.
   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

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How to Rename a Source

Complete this procedure to rename a source in the Output Manager Console.

1. From the Sources tree, right-click a source and click **Rename**.
2. In the edit field, type the new source name and press Enter. To cancel the rename, press Esc.

How to Copy a Source

Complete the following procedure to copy a source in the Output Manager Console.

Sources can be copied into multiple source groups.

1. From the Sources tree, select the source you want to copy and hold down the Ctrl key.
2. While pressing Ctrl, drag the source to the desired tree location.
   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the copy will be created.

How to View All Messages for a Source

Complete this procedure to display all messages that are related to a source.

- In the Sources grid, right-click a source and click **View messages**.

This displays the Message Console listing all messages related to the selected source.

Configuring Document Property Profiles

Advanced document properties facilitate the setting of document properties from multiple sources. Document properties can be set from Output Manager Print Server headers, LPD headers, job tickets, data contained in the document, or fixed values, and so on. Advanced document properties is a complex feature that only advanced users and professional service engineers should configure.

To configure document properties, you must first configure one or more profiles for the desired type of header data. Your profile options are native header profile, job ticket profile, job parsing profile, and headers from data profile. The configuration of these profiles includes specifying which headers to use, what Nuance Output Manager document properties to map them to, and potentially which job ticket values to match to which Nuance Output Manager property values.

Once the profiles are configured, choose the order in which the configured profiles are used when a document is received, and what the default static value is if no data is found in the respective header.

The profiles of the individual document information sources (native header, job ticket, job parsing, and headers from data) can be reused in many different advanced document property profiles, just as the advanced document property profile can be reused by many different Nuance Output Manager source devices.

Complete the following procedure to configure document profiles during source configuration:

- *Configuring Document Profiles During Source Configuration*

How to Configure Document Profiles During Source Configuration

Perform this procedure to configure document properties profiles while configuring a source.

1. In the **Source Configuration** dialog box, click the **Document Properties** tab.
2. Select the **Use advanced document properties** check box.
3. Choose the document properties profile for the source.

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To	Do this
Use the default properties profile	• Make sure that Default is selected in the box.
Use an existing profile	Either of the following: • In the profile box, select the profile that you want to use. • Click the **Manage** button to open the **Manage Document Properties Profiles** dialog box and select a profile.
Create a new profile	**1.** Click the **New** button. **2.** Enter the **Name** and **Description** for the profile.
Edit a profile	Either of the following: • In the profile box, select the profile that you want to use, and then click **Edit**. • Click the **Manage** button to open the **Manage Document Properties Profiles** dialog box to select and edit a profile.

4. Configure the profile.
   - See *Configuring Document Properties Profiles*.

5. Determine the profile order.
   - See *Ordering Document Properties Profiles*.

How to Configure a Document Properties Profile

Perform this procedure to configure document profiles.

- To configure advanced document properties, you must configure one or more of the following profiles:
  - *Native header profile*
  - *Job ticket profile*
  - *Job parsing profile*
  - *Headers from data profile*

How to Configure Native Header Profiles

Complete this procedure to configure native header profiles.

Native headers contain information that arrives as part of the transmission protocol that is used to receive documents.

1. Open the **Document Properties Profile** dialog box, if it is not open already.

2. Next to **Native header profile**, click **New** to create a native header profile.

   You can also select a profile in the list and click **Edit** to make modifications.

3. Enter the profile **Name** and **Description**.

4. On the **Native headers tab**, select one or more of the Nuance Output Manager device types whose headers should be available for mapping.
   - **Email**

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- **FTP**
- **LPD**
- **Network folder**
- **Socket**
- **WebSphere MQ**
- **Windows queue**
- **BEPS devices**

The selected native headers will be available on the **Document property mappings** tab and the **Document owner mapping** tab.

5. Configure the document property mappings.

   See *Configuring Document Property Mappings*.

6. Configure the document owner mappings.

   See *Configuring Document Owner Mappings*.

How to Configure Job Ticket Profiles

Complete this procedure to configure a job ticket profile.

Job tickets contain information about the document, and/or how the document should be treated. Tickets are logically separate from the document, and in some cases are inserted in front of the document file.

1. Next to **Job ticket profile**, click **New** to create a job ticket profile.

   You can also select a profile in the list and click **Edit** to make modifications.

2. Enter the profile **Name** and **Description**.
3. On the **Job ticket** tab, in the **Type** box, select one of the following job ticket types:

XML Job Ticket	An external job ticket template in an XML format. The XML tags are accessible throughout the job ticket profile configuration.
NSi Spool Header	A group of fields that are associated with Output Manager Print Server.
Output Statement	A list of fields associated with the Nuance RJE header.

4. If you selected XML Job Ticket, click **Map job ticket**, and in the **Open** dialog box, select one or more sample tickets to create the ticket mappings. If necessary, click **Clear mappings** to remove any associated job mapping.

   This option is not available for NSi Spool Header and Output Statement tickets, as they have fixed mappings.

5. Once one or more sample tickets have been mapped, use one of the following methods to search for the job ticket.

Option	Description
Embedded in the document	Searches for the job ticket embedded in a document. To use this option configure the following options: 1. In the **Start of job ticket recognition string** box, enter the appropriate string value. 2. In the **End of job ticket recognition string** box, enter the appropriate string value. 3. Use the **Remove from document** check box to determine if the job ticket data should be removed from the document.

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Option	Description
	4. When using job tickets, all lines up to and including the job ticket are deleted from the file. Select the **Keep data prior** check box to prevent data loss.
In a separate file	Searches for the job ticket in a separate file. To use this option, configure the following options: 1. In the **Folder to search** box, click the browse button (**...**) to choose a folder to search or type the folder location in the box. 2. In the **Match job ticket file name using this document property** list, select the appropriate property. 3. In the **Match job ticket extension using this extension** box, enter the appropriate file extension. 4. Use the **Delete job ticket file after processing document** to determine if the job ticket profile should be deleted after processing.

6. In the **If the job ticket is not found, take the following action** list, select how to process the document if the job ticket is not found. You can choose to process the document normally, receive the document and place it in error state, or reject the document.
7. Configure the document property mappings.

   See *Configuring Document Property Mappings*.
8. Configure the document owner mappings.

   See *Configuring Document Owner Mappings*.

How to Configure Job Parsing Profiles

Complete the following procedure to configure a job parsing profile.

1. Next to **Job parsing profile**, click **New** to create a job parsing profile.

   You can also select a profile in the list and click **Edit** to make modifications.
2. Enter the profile **Name** and **Description**.
3. From the **Job parsing tab**, select the Originating printer family from the drop-down list.
4. Use one of the following methods to search for the printing instructions/job ticket.

Option	Description
Embedded in the document	Searches for the printing instructions/job ticket embedded in a document. • Use the **Remove from document** check box to determine if the job ticket data should be removed from the document. • When using job tickets, all lines up to and including the job ticket are deleted from the file. Select the **Keep data prior** check box to prevent data loss.

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Option	Description
In a separate file	Searches for the printing instructions/job ticket in a separate file. To use this option, configure the following options: • In the **Folder to search** box, click the browse button (**...**) to choose a folder to search or type the folder location in the box. • In the **Match job ticket file name using this document property** list, select the appropriate property. • In the **Match job ticket extension using this extension** box, enter the appropriate file extension. • Use the **Delete job ticket file after processing document** to determine if the job ticket profile should be deleted after processing.

5. In the **If the job ticket is not found, take the following action** list, select how to process the document if the job ticket is not found.

   You can choose to process the document normally, receive the document and place it in error state, or reject the document.
6. Configure the document property mappings.

   See *Configuring Document Property Mappings*.
7. Configure the document owner mappings.

   See *Configuring Document Owner Mappings*.

How to Configure Headers from Data Profiles

Complete the following procedure to configure a headers from data profile.

Headers from data profiles consist of information that Nuance Output Manager can extract from specified location within the actual document data. Nuance Output Manager can extract data from documents in various formats including ASCII, ASCII with ASA, S/370, and VBM.

1. Next to **Headers from data profile**, click **New** to create a headers from data profile.

   You can also select a profile in the list and click **Edit** to make modifications.
2. Enter the profile **Name** and **Description**.
3. From the **Headers from data tab**, select the **Data format**.

   You can choose ASCII, ASCII with ASA, S/370, or VBM.
4. In the **Code page** list, select the code page for the document.
5. Specify the **Extraction method**, you can choose one of the following:

Option	Description
Line-based	Searches for the header based on a particular line.
Record-based	Searches for the header based on a particular record, regardless of page breaks.

6. In the **Headers to extract** grid, click in the grid to enter the headers to extract.

   These variables will appear on the **Document property mappings tab** and **Document owner mapping tab**.

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7. Enter the following information in each column.

Option	Description
Line-based	• **Name column** — Specifies the header field for the data to be placed in. • **Page column** — Specifies the page where data extraction will begin. • **Line column** — Specifies the line number in the file that contains the data. • **Column column** — Specifies the column where data extraction will begin. For ASCII with ASA carriage control files, the first column is not counted (in other words, the second column is treated as the first column). • **Length column** — Specifies how many characters to extract.
Record-based	• **Name column** — Specifies the header field for the data to be placed in. • **Record column** — Specifies the record number in the file that contains the data. • **Position column** — Specifies the position where the header data will begin. • **Length column** — Specifies how many characters to extract.

8. Configure the document property mappings.
   See *Configuring Document Property Mappings*.
9. Configure the document owner mappings.
   See *Configuring Document Owner Mappings*.

How to Configure Document Property Mappings

Complete this procedure to configure the document property mappings for the extraction profile.

1. Click the **Document property mappings** tab.
2. To enable a document property mapping, click the **Map Values** check box for the appropriate property.
3. Click in the **External Field** column, to select the mapping from the list shown.
   If necessary, you can use the look up table to adjust the values.
4. Click in the **Unmapped Value Action** column to select what happens when there is a missing look up table entry.
   You can choose to skip the property mapping entirely, assign the external value as-is, or assign the unmapped value default.
5. Click in the **Unmapped Value Default** column to specify a default value.

How to Configure Document Owner Mappings

Complete this procedure to specify how the document owner is set.

1. Click the **Document owner mapping** tab.
2. Choose one of the following options for setting the document owner.

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Option	Description
Use the Windows user id (if available)	Sets the document owner to the Windows user ID. This can be used with the following source types: Windows queue, network folder, and Web file upload.
Map to the following external field	Sets the document owner to external field selected in the drop-down list. **Note:** For **Job ticket** tab profiles, the ticket information fields are expressed as XPath statements. XPath statements show the structure of the ticket information. It allows the ability to specify a specific instance of a field if that particular information field occurs more than once in a documents metadata. If a particular external field is not listed in the list, the XPath statement can be directly entered. For **Headers from data** tab profiles, this list will be populated with the headers specified.

3. If you chose to map to an external field, use one of the following methods to map the field.

Method	Description
Use the external value as the OM user name	Uses external document property information as the Nuance Output Manager user name. Note, when the document is first received by the source the document has existing properties. These properties are called external document property values.
Use the following lookup profile	This is not currently implemented. When implemented, you will be able to use a lookup table to map Personal Identification Numbers to user names.
Use the following value mappings	Uses the values entered in the table for the external document property value. Click directly in the table to enter the mapping values. When the external document property has one of the values listed in the **External Field Value** column, the value in the **Property Value** column will be used.

4. Optional: If desired, under **If unable to determine the document owner, assign the following user**, click the ellipsis button to assign a document owner from the **User and Group Selection** dialog box.

   This user will be assigned if the document owner cannot be determined using the above mapping settings.
5. Click **OK**.

How to Order Document Property Profiles

Complete this procedure to order document property profiles.

You can determine the order in which the configured profiles are used when a document is received, and what the default static value is if no data is found in the respective header. The mapping order can be configured for each document property.

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1. From the **Document Properties Profile** dialog box, in the grid, click in the **Mapping Order** column for the Nuance Output Manager document property.
   This displays a configuration grid below the cell.
2. Use the following procedures to configure the mapping order.
   - Configure the order in which headers are processed by selecting the appropriate rows and clicking the **Up** and **Down** buttons.
   - To enter a default static value, click in the **Mapping/Value** cell next to **Static Value** and either type or select the value.

     This static value is used if no data is found in the preceding headers. The static value by default is the value for that document property in the source's **Document properties** tab.
3. Click **OK** to create the document profile.

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Destinations

Learning About the Destinations Application

Use the **Destinations** application to manage and monitor destinations. The **Destinations** navigation pane displays a configurable tree showing all destinations. You can drag-and-drop destinations to destination groups. Destinations are used only for outbound data. They route files from Nuance Output Manager to a physical destination, such as a laser printer, a host, or other location on the LAN.

The console window displays a tabbed view of the **Destination** tree selection. When a destination is selected in the tree, a destination home page will display showing the properties and status of the destination. When a destination group (folder) is selected in the tree, the **Destinations** grid will display listing all of the destinations in the group. The **Destinations** grid is in a tab page control. By default, navigating the tree will replace the information in the active tab. To open a destination or group in a new tab, right-click the item and click **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

By default a **Documents** grid will display below the **Destinations** grid. Notice there are two tabs below the grid, **Spooled** and **Retained**. The **Spooled** tab lists all of the documents currently mapped to the destination selected in the tree. The **Retained** tab lists all of the documents that were printed and retained by the selected destination. If a group is selected, the list will contain documents for all of the destinations in the group. You can switch the tabs to view either spooled or retained documents. As you select items in the tree, both of the grids will update to show only the appropriate documents.

The following table describes destination states:

Destination State	Description
Offline	The destination cannot accept documents.
Ready	The destination is ready to accept documents.
Processing	The document that is being sent to the destination is bein g prepared for printing. The destination is waiting to star t printing.
Printing	A document is currently being printed.
Pause	Document processing has been paused.
Intervention	An error has occurred on the physical printer that require s user intervention. For example, the printer may be out o f paper or there could be a printer jam.
Down	An error occurred on the printer.
Warning ON	This state is used only for Output Manager Print Server destination printers. This indicates the Output Manager Print Server destination printer is in an intervention state (for example, out of paper, cover open, and needs toner).

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Destination State	Description
Moving Off-Line	A printer destination has been disabled while a documen t is being printed. The printer will continue to print the d ocument until completed.
Moving On-Line	This is a transitional state that occurs when the printer is in a **Moving Off-Line** state, the destination is printing a large document, and the operator decides to set the desti nation back to **Enabled** before the document finishes pri nting.

How to Manage Destination Groups

Destination groups are used to organize destinations in the Destination tree.

Groups are represented as folders in the tree. From the Output Manager Console Destinations tree, you can create, move, rename, and delete destination groups.

- *Create a destination group*
- *Move a destination group*
- *Rename a destination group*
- *Delete a destination group*

To create a destination group

When you create a new group inside of an existing group, it inherits the permissions of the parent group.

1. In the **Destinations** tree, right-click a destination group (folder) and click **New Group**. A new group (folder) titled **UnNamed** is added to the selected destination group.
2. In the edit field, type the name of the new group and press Enter.

To move a destination group

1. In the **Destinations** tree, click the destination group you want to move.
2. Drag the group to the desired tree location.

   As you drag the group, a yellow arrow will appear to the left of the tree to indicate where the group will be placed.

To rename a destination group

1. In the **Destinations** tree, right-click a destination group, and click **Rename**.
2. In the edit field, type the new group name and press Enter. To cancel the rename, press ESC.

To delete a destination group

All of the objects must be removed before the group can be deleted. Groups that contain destinations or destination groups cannot be deleted.

1. In the **Destinations** tree, right-click the destination you want to delete.
2. Click **Delete** on the shortcut menu.

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How to Add Destinations

Complete this procedure to add destinations to the **Destinations** application.

1. In the **Destinations** tree, right-click the destination group (folder) where you want to add destinations, and click **New Destination** on the shortcut menu.
   This opens the **Add Destination** dialog.
2. In the **Type** list, choose to create one of the follow destination types:
   - Document Library
   - Email
   - FTP
   - IPDS (not available for new sales)
   - IPP
   - JDF/JMF
   - LPR
   - Network Folder
   - Output Manager
   - PRISMAProduction
   - SharePoint
   - Socket
   - WebSphere MQ
   - Windows Queue
3. Next to **Add new devices** enter the number of destinations you want to create.

   You can create multiple destinations of the type selected and configure the destinations simultaneously. The configuration tab pages that displays is different depending on whether you choose to create a single destination or multiple destinations.

Destination	Displays
Single destination configuration	Configuration options are listed on the tab pages.
Multiple destination configuration	Destinations are configured in grid format on each tab page.

   You will need to configure the options for each destination row. You can use **Series Fill** to automatically populate multiple fields in a column. To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog box. The series will start with the first selected row.
4. Click **OK**.
   Tab pages will display with options specific to the selected destination type. The configuration options is different depending on whether you choose to create a single destination or multiple destinations. When configuring one destination, individual options are listed on the tab pages. When configuring multiple destinations, the options are listed in grid format to allow for configuring multiple destinations simultaneously. You can add and remove destinations by clicking **Add** and **Remove** below the grid. You can also select destinations and click **Copy** to create copies
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

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a) Enter the destination **Name**.
b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

   The destination does not have to be on the same server as the Nuance Output Manager Output Service.
c) Enter any **Comments** or **Location** information for the destination.
d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

   The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Make the necessary changes on each tab.
7. Click **OK**.

How to Modify Destinations

Complete this procedure to modify destinations in the **Destinations** application.

1. In the **Destinations** tree, right-click the destination you want to modify and click **Configure**.

   You can also right-click a destination in the grid view and click **Configure**.

   The dialog box that opens will vary depending on the type of destination selected.
2. In the **Configuration** dialog box, make any necessary changes.
3. Click **OK**

How to Remove Destinations

Complete the following steps to remove destinations from the **Destinations** application.

1. In the **Destinations** tree, right-click the destination you want to delete.
2. Click **Delete** on the shortcut menu.

How to Import Destinations

Use this procedure to import a list of destinations into Nuance Output Manager.

Before you begin, review the following information on configuring and importing comma-separated values (CSV) files:

- In the CSV file, the header record (first record) determines which fields are defined. You must configure the field names in the header record to match predefined Nuance Output Manager names. Field names that match are used to populate the settings associated with that column. Field names that do not match are ignored. Contact Nuance Support for the list of predefined Nuance Output Manager names.
- Each record after the header record is created as a device. The device will contain the settings from the recognized columns for that record. Nuance Output Manager interprets values for text and numeric settings. For settings that have a fixed list of options, Nuance Output Manager matches the value to the name of the option. Values which are not recognized, out of bounds, or otherwise invalid are replaced with the default value for that setting.
- Not all settings can be specified through the CSV file. For example, the input/output server, users, destinations, and profiles cannot be imported.

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- A single CSV file can be used to generate multiple device types, sources, and destinations. Nuance Output Manager only imports the settings which are recognized by the device type you are creating. For example, the CSV file can contain settings that are common to all devices types, settings for a particular device type, or settings for several different device types.

Importing a destination is particularly useful if you have a database or spreadsheet that lists your existing equipment. You can save the destination list as a CSV file and then import it to create matching destinations in Nuance Output Manager.

1. In the **Destinations** tree, right-click a destination group (folder) and click **New Destination**.

   The new destinations will be created in this group.
2. In the **Add Destination dialog box**, select the destination **Type**:

   - Email
   - OM
   - FTP
   - IPP LPR
   - Network Folder
   - Socket
   - WebSphere MQ
   - Windows Queue

   You cannot currently import IPDS destinations.
3. Select **Import devices from configuration (.CSV) file**.
4. In the box, enter the path and file name of the configuration file, or click the browse (**...**) button to navigate to the file.
5. After you specify the configuration file, click **OK**.
   Tab pages will display with options specific to the selected destination type.
6. Make the necessary changes on each tab.

   For instructions specific to each destination type, refer to the following topics:

   - *Sending documents to an email address*
   - *Routing documents to another Nuance Output Manager*
   - *Sending documents to an FTP server*
   - *Sending documents to an IPDS printer (not available for new sales)*
   - *Sending documents to an IPP destination*
   - *Sending documents to an LPR server*
   - *Sending documents to a network folder*
   - *Sending documents to a PRISMAProduction destination*
   - *Sending documents to a SharePoint site*
   - *Sending documents to a socket*
   - *Sending documents to a WebSphere MQ*
   - *Sending documents to a Windows queue*
7. Click **OK**.

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How to Redirect Destinations

Complete this procedure to redirect a destination in the **Destinations** application.

Destinations can be set in a redirect mode. This causes new documents assigned to a destination to be automatically reassigned to a different destination.

For example, you can configure Destination A to reassign all received documents to Destination B. Documents already assigned to Destination A when the redirection occurs, will not be redirected. Documents received for Destination A while the redirection is in affect, will be assigned to Destination B. This includes Destination A being assigned by a source as a document is received, Destination A being assigned during business rule processing, and Destination A being assigned by failover processing. Destination assignments as a result of failover to Destination A will also be redirected to Destination B.

1. From the **Destinations** tree or **Destination** grid, right-click the destination you want to redirect and click **Destination Redirect**.
   This opens the **Select Redirected Destination** dialog box.
2. In the tree, select the destination you want to receive the redirected documents.

   The destination icon in the tree indicates if the destination is offline. The images for offline destinations are gray with a red no symbol (for example, an offline folder destination would display as).
3. Configure the redirect by choosing one of the radio button options. To disable redirect, choose **Do not redirect printer**.

   You can select to redirect until manually turned off, redirect for a number of hours, redirect for a number of minutes, or redirect until a specific date and time.
4. Click **OK**.

How to Search for Destinations

Perform the following procedure to search for destinations.

- You can search for destinations from the **Destinations** tree or the **Destinations** grid.

To search from the:	Do this
Destinations tree	• In the **Search** box below the tree, type the text you want to find and press Enter or click the search button.
Destinations grid	• In the **Search** box below the grid, type the text you want to find, click the column in the grid you want to search, and press Enter or click the Search image.

If the text is found, the focus will move to the first occurrence. New buttons appear near the **Search** box that allow you to move to the previous or next occurrence.

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How to Configure Security for Destinations

Follow steps in this procedure to configure permissions to destinations for user or groups.

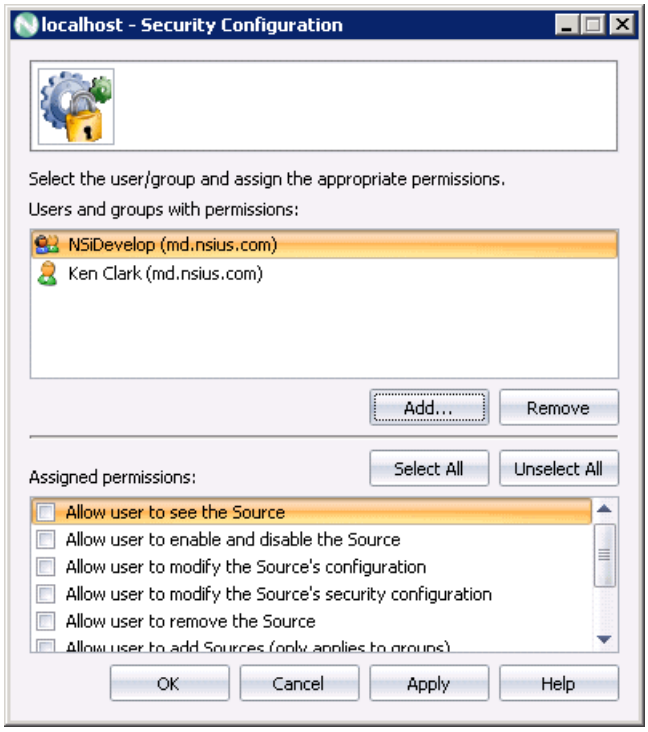
To begin configuring destination security, start by assigning the desired destination permissions for the All Destinations group. To view destinations in the tree, users or user groups must be assigned the **Allow user to view the Destination** permission in the **All Destinations** group. Users not assigned this permission in the **All Destinations** group will not see any destinations or groups even though they may have been given permissions for the specific destination or group.

Nuance Output Manager security for the Destinations application begins at the root of the Destinations tree, the All Destinations group. The Destinations tree consists of destinations and destination groups. A destination is an output from Nuance Output Manager. A destination group is a way to organize destinations. Nuance Output Manager security is provided for both by adding a Microsoft Windows user or user group to the destination or destination group and assigning permissions to that user or user group. These Nuance Output Manager permissions define the type of access users and user groups have to the destinations and destination groups. Once the Nuance Output Manager security (Microsoft Windows users, user groups, and destination permissions) is set in a destination group, the Nuance Output Manager security is inherited by all the objects in that destination group. When a new destination or destination group is created, its security is automatically the same as its parent destination group's security (that is, the new destination inherits its security from its parent destination group).

1. In the Output Manager Console, select the Destinations application in the navigation pane.
2. In the **Destinations** tree, right-click a destination or destination group and click **Security**.

   To complete this step, a user must be a member of the local Administrators group or be assigned the **Allow user to modify the Destination's security configuration** permission. Users with this permission can add and remove users or groups and modify assigned permissions.

   Completing this step opens the **Security Configuration** dialog box.



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3. Use the **Inherit permissions from the parent** option to inherit permissions from a parent group or to remove inheritance.
   - Click the browse button (**...**) to select a new parent group for inheritance or to remove inheritance.

   By default, destinations are configured to inherit permissions from the parent folder.

   Tip: It is a recommended practice to assign rights using inheritance, as it allows administrators to easily assign and manage permissions. Blocking inheritance is useful when a destination or destination group needs to be seen by just a few users. If you plan to block inheritance, make sure the users that need access to the blocked destination or group are in the security settings for all of its parent groups, including All Destinations. If this is not done then those users will not be able to see the destination. Also remember to remove the users and user groups that should not have access to the destination or group.
4. In the **Users and groups with permissions** box, select a user or group to manage.
   - If a group or user does not appear in the list, click **Add** to open the **User and Group Selection** dialog box. See *Adding users and groups to Nuance Output Manager* for detailed procedures on adding users.

   The **Assigned permissions** list box displays permissions that are currently granted to the selected user or group.
5. In the **Assigned permissions** box, select or clear check boxes to grant or revoke permissions for the selected user or group.
   - You can click **Select All** or **Unselect All** to quickly grant or revoke all permissions.

   The permissions assigned to a destination group will be inherited for all of the objects contained in that group, except for the ones that have inheritance blocked.

   If you notice permissions that are selected and disabled, then the user/group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first block inheritance for the destination.
6. When you are finished configuring security, click **OK** to save your changes.

Routing Documents

Sending Documents to AutoStore

Complete this procedure to define a destination for printing to AutoStore.

1. In the **Destinations** tree, right-click the destination group (folder) where you want to add destinations, and click **New Destination**.
2. In the **Type** drop-down list box on the **Add Destination** dialog box, select AutoStore.
3. Click **OK**.
4. Configure general settings:
   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.
   c) Enter any **Comments** or **Location** information.
   d) Optional: To change the large destination image that appears when configuring a single destination, click **Select Image** and select the image file (BMP, JPEG, or PNG). To change the image back to the default, click **Reset Image**.

      The selected image is compressed and scaled to 96x96 pixels. Changing this image does not change the smaller image that displays or the image that displays in the destination tree.

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5. On the **AutoStore settings** tab, configure settings as described in *AutoStore settings tab (Destination Configuration)* on page 497.

   You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties appears. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and select the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

6. Configure options on the **More settings** tab:

   a) Select the printing cost per page for black and white and color documents.

   b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

   c) Select the appropriate **Printer family**.

      Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

   d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

      These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

   e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

      - To create a process during single destination configuration, click **New**.
      - To create during multiple destination configuration, click the Browse button.

      Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

   f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

   g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

      - To create a profile during single destination configuration, click **New**.
      - To create during multiple destination configuration, click the Browse button.

      Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

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h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

7. On the **Error handling** tab, configure the error handling options.
   - For single destination configuration, use the *Error handling tab*.
   - For multiple destination configuration, use the *Error handling tab (Bulk Configuration)*.

   a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

      Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

   b) Choose the **Default failover destination**.

      This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

8. Click **OK**.

Sending Documents to an Email Address

Complete this procedure to define destinations for printing to an email address. Documents routed to a destination will be sent to the specified email address.

1. In the **Destinations** tree, right-click the destination group (folder) where you want to add destinations, and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select Email.
3. In the **Add new devices** box, enter the number of destinations you want to create.

   You can create a single email destination or create multiple email destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.

   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.

   c) Enter any **Comments** or **Location** information for the destination.

   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure email settings.

Configuration	Method
Single destination configuration	Use the **Email settings** tab.
Multiple destination configuration	Use the **Email settings** (Bulk Configuration) tab.

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a) Select the **Email profile** that will be used with this destination.

   You can select a profile in the list or click the **...** button and manage profiles in the **Manage Outbound Email Profiles** dialog box. In this dialog box you can create and modify email profiles.

b) In the **To**, **CC**, and **BCC** fields, enter destination email addresses. Separate multiple email addresses with a comma.

c) In the **From** field, specify the email address that will be shown as the sender of all documents sent to this destination.

d) In the **Reply to** field, specify the email address where replies will be routed. You can enter multiple email addresses separated by a comma.

e) Enter the **Subject** that will display for all documents sent to this destination.

f) Enter the **Body** text that will display in the email message for all documents sent to this destination.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property in the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

   Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

   These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

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- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to a Fiery Device

Complete this procedure to define destinations for printing to a fiery device. Documents routed to this destination will be sent to the fiery device specified.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.

2. In the **Type** list, select Fiery Device.

3. Next to **Add new devices**, enter the number of destinations you want to create.

You can create a single destination or create multiple destinations and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

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For multiple destination configuration, this is configured on the **General** tab.

a) Enter the destination **Name**.
b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

   The destination does not have to be on the same server as the Nuance Output Manager Output Service.
c) Enter any **Comments** or **Location** information for the destination.
d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

   The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure fiery device settings.

Configuration	Method
Single destination configuration	Use the **Fiery device settings** tab.
Multiple destination configuration	Use the **Fiery device settings** (Bulk Configuration) ta b.

a) Enter a valid **Fiery server**.

   This can be a server name or IP address.
b) Specify the port number. To use the default fiery port, select the **Use default port** check box. To specify a port number, disable the check box and enter the **Port** number in the spin box.

   The port number must be from 1 through 65536. The default value is 8021.
c) Configure the logon for the server. To use the Windows credentials of the Nuance Output Manager Output Service to logon, select the **Use service logon** check box. To specify a logon, make sure the check box is disabled and enter the **User name** and **Password** that will be used.
d) Specify the **Logical printer** on the fiery server where documents will be sent to for printing.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties is displayed. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

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c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

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This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to an FTP Server

Complete this procedure to define destinations for printing to an FTP server. Documents routed to a destination will be sent to the FTP server specified by the destination.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select FTP.
3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure FTP settings.

Configuration	Method
Single destination configuration	Use the **FTP settings** tab.
Multiple destination configuration	Use the **FTP settings** (Bulk Configuration) tab.

   a) Enter a valid **FTP server**. This can be an FTP or IP address.
   b) Enter the host's **Port** number.

      The port number must be from 1 through 65536. The default value is 21.
   c) Enter the **User name** that will be used when logging onto the host.

      If the host does not require a user name, you can leave this box blank.
   d) Enter the **Password** that will be used when logging onto the host.

      If the host does not require a password, you can leave this box blank.
   e) Enter the **Target folder**.

      This is the location on the host where the files will be placed. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at `\FTP\UserName`, you can either specify `\FTP\UserName\MyDestFiles` or `\MyDestFiles`).

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f) Choose if you want to **Use passive mode**.

This determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

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g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to an IPDS Printer

Complete this procedure to define destinations for printing to an IPDS printer.

Important: If you use a third-party conversion tool, verify that it is licensed for the necessary input formats and for IPDS output to use IPDS destinations.

Notice: Please note that the IPDS output option is not available for new sales.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.

2. In the **Type** list, select IPDS.

Currently you can configure only one IPDS destination at a time.

3. Click **OK**.

4. Configure the general settings.

For multiple destination configuration, this is configured on the **General** tab.

a) Enter the destination **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

The destination does not have to be on the same server as the Nuance Output Manager Output Service.

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c) Enter any **Comments** or **Location** information for the destination.

d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

5. Configure the IPDS settings.

a) On the **IPDS settings** tab, click **Create** to create an IPDS transform configuration. If an IPDS configuration is already defined for the printer, click **Edit** to view or change your configuration settings.
This opens the **Configure Transform** dialog box.

b) In the **Server** list, click the Nuance Output Manager server where the conversion tool is installed.

c) In the **Transform package** list, you can select an existing IPDS transform package or create one. Complete the following steps to create an IPDS transform package.

1. Click **New**.

This opens the **General** tab.

2. Enter the transform package **Name**.

The transform package **Type** will display IPDS.

3. Verify the **EXE path** is set to the correct folder. To change the path, type in the box or click the browse button (**...**).

The EXE path for the IPDS transform type is automatically selected, @EOMTransformDir.

4. Set the **Logging State**.

The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes.

All log files should be inspected during installation and preproduction testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.

5. On the **Filter Profiles** tab, configure the IPD (IPDS) profile to enter the IPDS printer name and IP address. Configure/select a filter profile for the remaining formats as necessary.

We recommend that to avoid confusion the same printer name be used within the IPDS profile and for the Nuance Output Manager destination name. Multiple IPDS printers and connections can be configured in the same profile.

6. To configure a profile, click the browse button (**...**) in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile as needed.

The profile contains a communications and printer definition section.

7. To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.

8. On the **Resources** tab, you can control the search order for font resources.

You can add paths by clicking in the top row of the grid or modify the listed paths by clicking directly in the grid. You will need to verify the Adobe and Ghostscript paths are correct and update if necessary (make sure to use the path to the fonts, not the path to the EXE file).

9. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts.

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The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.

10. Click **OK** to create the transform package.
11. Select the **Override input filter profile assigned to document** check box if you want to use the filter profile in the transform package.

    Use the **Override input filter profile assigned to document** check box option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package.
12. Configure the conversion of each input format in the **Input Formats** grid and then click **OK**.

For	Do This
All unlicensed input formats and any input formats you do not want to transform	Click the corresponding grid cell under th e **Configuration** column and select **Do Not Transform**.
Licensed input formats	Select **Use Default Options** or select a predefined c onfiguration in the **Configuration** column. To conf igure a custom input format, click the browse butto n (**...**) in the **Modify/New** column.

    If **Use Default Options** or **Do Not Transform**is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab.
13. In the **Printer name** list, select the IPDS printer to use.

    Tip: We recommend to avoid confusion that the same printer name be used within the IPDS profile and for the Nuance Output Manager destination name.

    You can configure a default value and a dynamic override value for this option. The default value is used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default value using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property** to display a menu containing all of the available properties. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box and click **Insert Function**, then choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

6. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
c) Select the appropriate **Printer family**.

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Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

7. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

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This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

8. Click **OK**.
   The IPDS destination displays the connection status in the **Extended Msg** destination column.
9. Add the **Extended Msg** destination column to the destination grid.
   For more information, see *Configuring columns*.

Sending Documents to an IPP Destination

Complete this procedure to define destinations for printing to an IPP (Internet Printing Protocol) connected printer.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select IPP.
3. Next to **Add new devices**, enter the number of destinations you want to create.
   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.
   For multiple destination configuration, this is configured on the **General** tab.
   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.
      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).
      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure IPP settings.

Configuration	Method
Single destination configuration	Use the **IPP settings** tab.
Multiple destination configuration	Use the **IPP settings** (Bulk Configuration) tab.

   a) Enter the **Printer URI** (network address).
      For example, http://server/printers/myprinter/printer.
   b) If necessary, enter the **Job name** that will be associated with all documents received by this destination.
      Typically the default **Dynamic override** value will be used for the job name.
   c) If necessary, enter the **User** that will be associated with all documents received by this destination.
      Typically the default **Dynamic override** value will be used for the user name.

   You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic

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box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

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h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to JDF/JMF

Complete this procedure to define destinations for JDF/JMF.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.
2. In the **Type** list, select JDF/JMF.
3. Next to **Add new devices**, enter the number of destinations you want to create.

You can create a single destination or create multiple destinations and configure them simultaneously.

4. Click **OK**.
5. Configure the general settings.

For multiple destination configuration, this is configured on the **General** tab.

a) Enter the destination **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

The destination does not have to be on the same server as the Nuance Output Manager Output Service.

c) Enter any **Comments** or **Location** information for the destination.

d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure JDF/JMF settings.

Configuration	Method
Single destination configuration	Use the **JDF/JMF settings** tab.

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Configuration	Method
Multiple destination configuration	Use the **JDF/JMF settings** (Bulk Configuration) tab.

a) Select the **JDF version**.
b) Select the **Job submission method** that will be used to send the document to the printer.

To	Do This
Submit ticket and data via folders	Enter the **Ticket folder** and **Data folder**.
Submit MIME package	Enter the **URL**.
Submit queue entry via folder	Enter the **Queue folder**.
Submit queue entry via web with links	Enter the **URL**.
Submit queue entry via web with folders	Enter the **URL**, **Ticket folder** and **Data folder**.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

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d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

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Sending Documents to an LPR Server

Complete the following steps to define destinations for printing to an LPR server. Documents routed to this destination will be sent to the specified LPR server and queue.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select LPR.
3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure LPR settings.

Configuration	Method
Single destination configuration	Use the **LPR settings** tab.
Multiple destination configuration	Use the **LPR settings** (Bulk Configuration) tab.

   a) Enter a valid **LPD server**.

      This can be an IP address or equivalent host name of the print server where documents will be sent.
   b) Enter the **Port** number for this LPR server.

      The default value is 515.
   c) Enter the name of the print **Queue** on the LPD server.
   d) Enter the **Banner Class (-C)**.

      This specifies the class name to be printed on the banner page. To print the banner page, the -L command must be used.
   e) Enter the **Banner Job Name (-J)**.

      This specifies the job name to be printed on the banner page. To print the banner page, the -L command must be used.
   f) Enter the **Banner User (-L)**.

      This causes the banner page to be printed. The user name can be omitted. The banner class (-C) and banner job name (-J) commands must precede this command in the control file to be effective.
   g) Enter the **Mail User (-M)**.

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This sends mail to the specified mailbox (example, mailbox@hostname) upon completion of the print job.

h) Enter the **User (-P)**.

This specifies the user identification of the entity requesting the printing job. This must be included in the control file.

i) Enter the **Title (-T)**.

This provides a title for a file that is to be printed with the "p" command code. It is ignored by all other printing commands.

j) Select the LPR **Print command**.

The default selection is **Plain text (-Of)**.

k) Use the **Control file first** check box to determine if you want to send the control file before the data files.

Once the control file has been received, the data files can be printed as they arrive. This is the default configuration.

l) Select **Send copies as separate transmissions** to send documents to the destination multiple times (based on the copy count property of the document).

Note:

When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have its second copy's first page print on the back of the first copy's last page. When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

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These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

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Sending Documents to a Network Folder

Complete this procedure to define destinations for printing to a network folder. Documents routed to this destination will be saved in a specified folder.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select Network Folder.
3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure network folder settings.

Configuration	Method
Single destination configuration	Use the **Folder settings** tab.
Multiple destination configuration	Use the **Folder settings** (Bulk Configuration) tab.

   a) Enter the **Folder** path where documents will be sent.

      For the specified folder, you must configure the Nuance Output Manager Services logon account user name to have Full Control Sharing permissions. Also, verify that the Administrators group has Full Control Security permissions. To configure these options, right-click the folder in Windows Explorer and click **Sharing and Security**.

      The default folder is `C:\NSi Files\`.
   b) Enter the **Subfolder** path where documents will be sent.

      If no subfolder path is entered, documents will be sent to the folder path.
   c) Select the **Create folder** check box if you want to automatically create the specified folders and/or subfolders when they do not exist.

      This will apply for default and dynamic values.
   d) Enter the **File name** the document will have when it is routed from Nuance Output Manager to its disk destination.
   e) In the **Base length** box, specify the maximum length of the file name.

      The default length is 40.

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f) In the **Extension length** box, specify the maximum length of the file name extension.

The default length is 40.

g) Select the **Allow spaces** check box to allow spaces in file names.

This option is selected by default. If you clear this check box, spaces in file names will be replaced with exclamation points.

h) Select the **Delete exclamation** check box to specify that exclamation points will be deleted from the file name.

i) Select the **Overwrite** check box to overwrite files with the same name. If you clear the check box, the new file will be saved with a new file name according to the following options.

- **Counter type** — If a duplicate file name is encountered, a new file name is created using a counter. Set this to In Base to include the numeric counter in the file base name. Set this to In Extension to include the counter in the file extension.
- **Counter length** — Specify the length of the counter that will be placed at the end of the file name.
- **Separator** — Specify the character that separates the file name from the counter. The default character is #. The following are invalid characters: \ / : * ? “ < > |.
- **Start with counter** — Select this check box to apply the counter to the first file. Clear this check box to start the counter in the first file with a duplicate name. This option is selected by default.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those

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options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Routing Documents to another Output Manager Instance

Complete this procedure to define destinations for routing to another Nuance Output Manager. Documents routed to this destination will be sent to the Nuance Output Manager server specified.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.

2. In the **Type** list, select OM.

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3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure Output Manager settings.

Configuration	Method
Single destination configuration	Use the **OM settings** tab.
Multiple destination configuration	Use the **OM settings** (Bulk Configuration) tab.

   You can configure a default value and a dynamic override value for this option. The default value is used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default value using document properties and functions. To insert document properties, right-click in the dynamic field and click **Insert Document Property**. This displays a menu containing all of the available properties. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.
7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

   a) Select the printing cost per page for black and white and color documents.
   b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
   c) Select the appropriate **Printer family**.

      Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
   d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

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These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

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Sending Documents to a PRISMAProduction Destination

Complete this procedure to define PRISMAProduction destinations for the Océ PRISMAproduction server. Documents routed to this destination will be sent to the specified server.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select PRISMAProduction.
3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure PRISMAProduction settings.

Configuration	Method
Single destination configuration	Use the **PRISMAProduction settings** tab.
Multiple destination configuration	Use the **PRISMAProduction settings** (Bulk Configur ation) tab.

   a) Specify the Océ PRISMAproduction **Server** where documents will be sent.
   b) Specify the **User name** that is associated with the documents.
   c) If you are configuring a single destination, you can specify the **Job queue** on the printer where documents will be routed.

   You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property in the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions.
7. Configure options on the **More settings** tab.

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Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
c) Select the appropriate **Printer family**.

   Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

   These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

   - To create a process during single destination configuration, click **New**.
   - To create during multiple destination configuration, click the Browse button.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.
f) Determine if you want to override the output process assigned to the document and use the selected destination output process.
g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

   - To create a profile during single destination configuration, click **New**.
   - To create during multiple destination configuration, click the Browse button.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).
h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.

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Configuration	Method
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

   Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

   This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to a SharePoint Site

Complete this procedure to define destinations for printing to a SharePoint site.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select SharePoint.

   Currently, you can configure only one SharePoint destination at a time.
3. Click **OK**.
4. Configure the general settings.
   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
5. On the **SharePoint device settings** tab, configure the following options.
   a) Specify the **SharePoint site** where documents will be sent.
      http://www.nuance.com/samplesite/
   b) Configure the logon for the server.
      - To use the Windows credentials of the Nuance Output Manager Output Service to logon, select **Use service logon** check box.
      - To specify a logon, make sure the check box is disabled and enter the **User name** and **Password** that will be used.
   c) If you are using SharePoint 2010 or newer, select the **SharePoint 2010 or newer** check box.

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If this check box is selected, Nuance Output Manager will use the SharePoint 2010 Client interface to communicate with the SharePoint site. If this check box is not selected, Nuance Output Manager will use the SharePoint Copy Web service (Copy.asmx) that is supported by all versions of SharePoint.

Important: You can configure a default value and a dynamic override for **Library**, **Folder**, and **Document Name**.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

d) In the **Library** box, type the name of the library in the SharePoint site where the files should be stored.

e) Optional: In the **Folder** box, type the name of the subfolder under the **Library** folder where files should be stored.

This entry is optional. If a folder is not specified, files will be placed in the root folder of the **Library**.

f) In the **Document name** box, specify the name to use when naming the document on the SharePoint site.

To pass the Nuance Output Manager name through, use [Document Name].

g) Select the **Overwrite** check box to overwrite a file with the same name. If you clear the check box a new file with the same name as an existing file will not be written to the site.

h) Select the **Check-in** check box to specify that files will be marked as **Checked In** on the SharePoint site. If you do not select this check box, files remain checked out by the user specified in the **User name** field above.

i) Click the **SharePoint fields** button to specify values to put in SharePoint fields or to map Nuance Output Manager fields to the SharePoint fields.

To add fields, click **SharePoint fields** and type the appropriate values directly in the **Field Name**, **Default Value**, and **Dynamic Override** columns. Click the **Add** and **Remove** buttons as necessary to remove fields. When finished, click **OK**.

Note: SharePoint libraries have various fields or columns to describe the files stored in them. They can also have custom fields to provide further descriptive information. Some of these fields can be modified by the user.

6. Configure options on the **More settings** tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family, click **New**.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the

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appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**. To create a process, click **New**.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box. To create a profile, click **New**.

   Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

7. On the **Error handling** tab, configure the error handling options.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile, click **New**.

   Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

   This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

8. Click **OK**.

Sending Documents to a Socket

Complete this procedure to define destinations for printing to a socket server. Documents routed to this destination will be sent to a specified IP address and port.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.

2. In the **Type** list, select Socket.

3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.

4. Click **OK**.

5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

a) Enter the destination **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

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The destination does not have to be on the same server as the Nuance Output Manager Output Service.

c) Enter any **Comments** or **Location** information for the destination.

d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

6. Configure the socket settings.

Configuration	Method
Single destination configuration	Use the **Socket settings** tab.
Multiple destination configuration	Use the **Socket settings** (Bulk Configuration) tab.

a) Enter the **IP address** or equivalent host name of the print server where the documents will be sent.

b) Enter the **Port** number for the host.

c) Select **Retry on timeout** to retry printing to this destination if a timeout occurs.

d) Select **Send copies as separate transmissions** to send documents to the destination multiple times (based on the copy count property of the document).

Note: When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have its second copy's first page print on the back of the first copy's last page.

When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property in the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.

b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

c) Select the appropriate **Printer family**.

Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family**

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Profile dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.

e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

- To create a process during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

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Sending Documents to a WebSphere MQ

Complete this procedure to define WebSphere MQ destinations. Documents routed to this destination will be sent as WebSphere MQ messages.

A WebSphere MQ client must be installed separately before you can use this destination.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
   This opens the **Add Destination** dialog box.
2. In the **Type** list, select WebSphere MQ.
3. Next to **Add new devices**, enter the number of destinations you want to create.

   You can create a single destination or create multiple destinations and configure them simultaneously.
4. Click **OK**.
5. Configure the general settings.

   For multiple destination configuration, this is configured on the **General** tab.

   a) Enter the destination **Name**.
   b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

      The destination does not have to be on the same server as the Nuance Output Manager Output Service.
   c) Enter any **Comments** or **Location** information for the destination.
   d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

      The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.
6. Configure the **WebSphere MQ settings**.

Configuration	Method
Single destination configuration	Use the **WebSphere MQ settings** tab.
Multiple destination configuration	Use the **WebSphere MQ settings** (Bulk Configuration) tab.

   a) In the **Queue manager** box, enter the name of the queue manager.

      This must match the queue manager specified in WebSphere MQ.
   b) In the **Queue name** box, enter the queue name where messages sent to this destination will be stored.

      This must match the queue name specified in WebSphere MQ.
   c) In the **Channel name** box, enter the channel configured for TCP/IP.

      You can get this name from the WebSphere MQ list of channels.

      Caution: Make sure the SSL certificate required option is not selected in WebSphere MQ. Nuance Output Manager does not support this at this time.
   d) In the **Connection name** box, enter the IP address and port or DNS name for the server to which you are attempting to connect.

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Messages are transferred over the connection and placed in the queue.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property in the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
c) Select the appropriate **Printer family**.

   Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

   These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

   - To create a process during single destination configuration, click **New**.
   - To create during multiple destination configuration, click the Browse button.

   Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.
f) Determine if you want to override the output process assigned to the document and use the selected destination output process.
g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

   - To create a profile during single destination configuration, click **New**.

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- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Sending Documents to a Windows Queue

Complete the following steps to define Windows Queue destinations.Documents routed to this destination will be sent to the designated print server and queue.

1. In the **Destinations** tree, the destination group (folder) where you want to add destinations, right-click the destination group (folder) where you want to add destinations and click **New Destination**.
This opens the **Add Destination** dialog box.
2. In the **Type** list, select Windows Queue.
3. Next to **Add new devices**, enter the number of destinations you want to create.

You can create a single destination or create multiple destinations and configure them simultaneously.

4. Click **OK**.
5. Configure the general settings.

For multiple destination configuration, this is configured on the **General** tab.

a) Enter the destination **Name**.

b) In the **Server** list, click the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.

The destination does not have to be on the same server as the Nuance Output Manager Output Service.

c) Enter any **Comments** or **Location** information for the destination.

d) Optional: To change the large destination image that displays when configuring a single destination, you can click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG).

The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the image back to the default, click **Reset Image**.

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6. Configure the **Windows queue settings**.

Configuration	Method
Single destination configuration	Use the **Windows queue settings** tab.
Multiple destination configuration	Use the **Windows queue settings** (Bulk Configuration) tab.

a) Enter the name of the **Print server** where documents will be sent.
b) Enter the name of the **Print queue**.

You can configure a default value and a dynamic override value for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. To insert document properties, right-click in the dynamic box and select **Insert Document Property**. A menu containing all of the available properties displays. You can select a property in the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. To insert functions, right-click in the dynamic box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

7. Configure options on the **More settings** tab.

Configuration	Method
Single destination configuration	Use the **More settings** tab.
Multiple destination configuration	Use the **More settings** (Bulk Configuration) tab.

a) Select the printing cost per page for black and white and color documents.
b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
c) Select the appropriate **Printer family**.

   Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
d) Optional: If you select a **Printer family**, you can configure **Destination specific capabilities**.

   These options determine which print preferences/document properties are supported by the destination. To configure destination specific capabilities, click **Configure** to open the **Destination Capabilities** dialog box. All of the document properties available to this destination are listed and grouped into categories. Expand the appropriate category by clicking the arrow next to the category name. Select the check boxes for properties you want to be available for configuration throughout Nuance Output Manager. Clear the check boxes for properties you do not want to be available. If a property is configured by selecting from a list of options, those options will display beneath the property. Select and clear the check boxes to determine the choices that will be available when those properties are configured. Repeat this step until all properties are configured, and then click **OK**.
e) Select the appropriate **Output process**. You can select an existing process in the list or create one using the **Process Designer**.

   - To create a process during single destination configuration, click **New**.
   - To create during multiple destination configuration, click the Browse button.

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Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

f) Determine if you want to override the output process assigned to the document and use the selected destination output process.

g) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

- To create a profile during single destination configuration, click **New**.
- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

h) Determine if you want to override the failover profile assigned to the document and use the selected destination failover profile.

8. On the **Error handling** tab, configure the error handling options.

Configuration	Method
Single destination configuration	Use the **Error Handling** tab.
Multiple destination configuration	Use the **Error Handling** (Bulk Configuration) tab.

a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

b) Choose the **Default failover destination**.

This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.

9. Click **OK**.

Note: Output Manager may not be able to detect the actual number of pages spooled to a print driver on the host machine. The **Output Manager Console** will then display "1" for **Total Pages** regardless of the actual number of spooled pages.

Configuring the Document Library

Complete the following steps to configure the Document Library destination. Documents routed to this destination will be sent to the Library application using the assigned library profile settings.

1. In the Destinations tree, right-click the **Document Library** destination and click **Configure**.
The document library destination is created by default during software installation.

2. If necessary you can modify the destination **Name** and enter **Comments**and a **Location**.

3. Optional: You can change the large destination image that displays when configuring a single destination. To do so, click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG). To change the image back to the default, click **Reset Image**.

The selected image is compressed and scaled to 96x96 pixels. Changing this image does not change the smaller image that displays or the image that displays in the destination tree.

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4. On the **Library settings tab**, select the appropriate library profile from the list or click the Browse button to display the **Manage Document Library Profiles** dialog box.

   The library profile contains all of the settings needed to properly "file" the document. All documents sent to the library destination will be assigned the selected profile. Note, if you route the document using a business rule with a *library profile* assigned, the business rule library profile will be used.

   From the **Manage Document Library Profiles** dialog box, you can create, modify, and remove library profiles.
5. Configure a library profile in the **Manage Document Library Profiles** dialog box.
   a) click **New**.
   b) Specify the library profile **Name** and **Description**.
   c) Determine where documents will be placed in the library. You must first click the **Base folder** Browse button to select an existing folder. If desired, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text and one or more document properties. To insert document properties, right-click in the text box, and click **Insert Document Property**. Some example document properties are date/time, document name, data type, and so on. Once you have entered the folder name, click **OK**.

      You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a sub folder of the folder above it in the list.
   d) Choose if you want to **Send email notification upon filing**. If you want to send an email notification when a document is sent to the library, select the check box and click Email. Configure the email setting on the **Send Email** dialog box.
   e) Specify the file store for documents sent to the library.

      You can choose to leave them in their current file store or move them to a specified file store.
   f) In the **Purge documents** box, specify how long documents should stay in the library before they are deleted.
6. Configure options on the **More settings** tab.
   a) Enter the printing cost per page for black and white and color documents.
   b) Select **Include documents in Green Reports** to make documents sent to the destination available for green reports. The documents appear in green reports if Nuance Output Manager deletes the documents from the server after being spooled but not printed.
   c) Select the appropriate **Printer family**.

      Printer families are used to configure commands for print languages and map them to destinations based on their capabilities. You can select an existing printer family in the list or create one in the **Printer Family Profile** dialog box. To create a printer family during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.
   d) Select the appropriate **Output process**. You can select an existing process in the list or click **New** to create one using the **Process Designer**

      Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

      You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Output Process Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles
   e) Optional: If you want to use the selected destination output process instead of the output process assigned to the document, select the **Override output process assigned to document** check box.
   f) Select the appropriate **Failover profile**. You can select an existing profile in the list or create one in the **Failover Profile** dialog box.

      - To create a profile during single destination configuration, click **New**.

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- To create during multiple destination configuration, click the Browse button.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

g) If you want to use the selected destination failover profile instead of the failover profile assigned to the document, select the **Override failover profile assigned to document** check box.

7. On the **Error handling** tab, configure the error handling options.
   a) Select the appropriate **Error handling profile**. You can select an existing profile in the list, or create one in the **Error Handling Profile** dialog box. To create a profile during single destination configuration, click **New**. To create during multiple destination configuration, click the Browse button.

      Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

   b) Choose the **Default failover destination**.

      This specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can choose to route the documents to a parent group or a specific destination or group. The parent group where the destination currently resides is selected by default.
8. Click **OK**.

After you complete this procedure, the library destination is configured and ready to receive documents.

How to Send Documents to a Destination Group

Use this procedure to configure how documents are routed within a group of destinations.

1. In the **Destinations** application, right-click the group and select **Configure Group Routing**.
2. On the **Group Routing Configuration** dialog box, select the routing method:
   - **Do not assign a destination** — This is the default method. Documents are assigned to a *pending queue* within the group and are not routed. Documents remain in the pending queue until they are manually assigned to a destination or until they are released from an Nuance Output Manager release station.
   - **Round robin among available destinations** — Documents are assigned to the next available destination in the group in a *round robin* fashion:
     - Use **Require matching document and destination properties** to only assign documents to destinations in the group if selected group property values match between the document and destination.
     - Click **Configure** to select the routing columns that are used by the group. See *Global Group Routing Map dialog box* on page 549 for more information.
3. To support using matching document and destination properties to route documents to destinations, set the routing criteria for the destination group:
   a) Right-click the destination group and select **Set Routing Criteria**.
   b) In the **Group Routing Criteria** dialog box, enter the matching criteria for each property for each destination in the group.

      To match any value for a document property, leave the corresponding group routing criteria column blank. To match more than one document property value, enter a comma separated list of possible values.

      When documents are routed to the group and do not match any destination routing criteria, the documents are held in the group pending queue until they are manually assigned to a destination or until they are released from an Nuance Output Manager release station.

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Managing Destinations

Destinations are used only for outbound data. They route files from Nuance Output Manager to a physical destination, such as a laser printer, a host, or other locations on the LAN. You can control destinations from the Output Manager Console using the following procedures.

- *Enable a destination*
- *Disable a destination*
- *View SNMP alerts*
- *Open a destination*
- *Move a destination*
- *Rename a destination*
- *Copy a destination*
- *View destination output history*
- *View all messages for a destination*

How to Enable a Destination

Enabling a destination allows it to accept documents for printing.

Use one of the following methods to enable a destination.

- In the **Destinations** grid, right-click a destination and click **Enable**.
- In the **Destinations** tree, right-click a destination and click **Enable**.

How to Disable a Destination

Disable a destination to prevent it from receiving documents.

Use one of the following methods to disable a destination.

- In the **Destinations** grid, right-click a destination and click **Disable**.
- In the **Destinations** tree, right-click a destination and click **Disable**.

How to View SNMP Alerts

Perform this procedure to view SNMP alerts.

The Nuance Output Manager SNMP Service uses SNMP to continuously monitor the specific device/printer status for each destination. The SNMP Alert Level will display in the Destinations grid and home page for the appropriate destination.

- To quickly view the SNMP alerts and details, right-click a destination in the grid and click **Alerts**.
  The **Alerts for Destination** dialog box displays all pending SNMP alerts for the selected destination.

Tip: You can use the **Alert Rules Manager** to configure Nuance Output Manager to take an action when specific alerts occur.

How to Open a Destination

Use one of the following methods to open a destination.

- In the **Destinations** tree, double-click a destination.
  The destination will open in the current tab.

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- In the **Destinations** tree, right-click a destination and click **Open**.
  The destination will open in the current tab.
- In the **Destinations** tree, right-click a destination and click **Open in New Tab**.
  The destination will open in a new tab.

How to Move a Destination

Complete this procedure to move a destination to a different location in the tree.

Destinations can be organized into destination groups. Once groups are created, destinations and groups can be easily moved in the **Destination** tree as necessary.

1. From the **Destinations** tree, select the destination or destination group you want to move.
2. Drag a destination to the desired tree location.

   As you drag an item, a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

How to Rename a Destination

Perform this procedure to rename a destination.

1. From the **Destinations** tree, right-click a destination and click **Rename**.
2. In the edit field, type the new destination name and press Enter. To cancel the rename, press Esc.

How to Copy a Destination

Complete the following steps to copy a destination.

Destinations can be copied into multiple destination groups.

1. From the **Destinations** tree, select the destination you want to copy and hold down the Ctrl key.
2. While pressing the Ctrl key, drag the destination in the desired tree location.

   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the copy will be created.

How to View Destination Output History

Complete this procedure to view the output history of destinations or destination folders.

You can choose from one of the predefined output history time frames or create a custom query.

1. In the **Destinations** tree, select a destination or destination folder.
2. Right-click and click **Output History**.
3. On the **Output History** submenu, choose one of the predefined output history time frames or create a custom query. To create a custom query, complete the following steps:
   a) In the submenu, click **Custom query**. The query tool dialog will display.
   b) Click the plus button next to the **AND** operator.
   c) To select the column, click the column name link in the condition and select the appropriate column from the list.

      All available columns will display in the list.
   d) Click the operator link in the condition and select the appropriate comparison operator from the list.

      The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
   e) Click the **<enter a value>** link and enter a value in the box.

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f) To add additional conditions, click the plus button next to the group's **AND** operator. This will create new conditions below the current one.
g) Repeat the preceding steps to complete each condition statement.
h) Click **OK** to query data using the new query statement.

To cancel the query, click the **Cancel Query Mode** button below the grid.

Tip: You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.

4. In the **Destination Output History** window, review the output history for the selected destination or folder.
5. Use the following procedures to change the output history as needed.

- In the **Destination** tree, click destinations and folders as necessary. The grid will update to match the new tree selection.
- Click a new history time period as necessary. The grid will update to match the new time period selection.
- Click **Refresh Query** below the grid to update the grid with the latest information.

Tip:

Search the tree:	In the **Search** box below the tree, type the text you want to find and press Enter or click the **Search** button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the **Search** box that allow you to move to the previous occurrence and move to the next occurrence.
Search the grid:	In the **Search** box below the grid, type the text you want to find, click the column in the grid you want to search, and then press Enter or click the **Search** button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the **Search** box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
Print the output history:	Click the **Print** button below the grid to print the output history.

How to View All Messages for a Destination

Perform this procedure to view messages about a destination.

- In the **Destinations** grid, right-click a destination and click **View messages**.

The **Message Console** will display listing all messages related to the selected destination.

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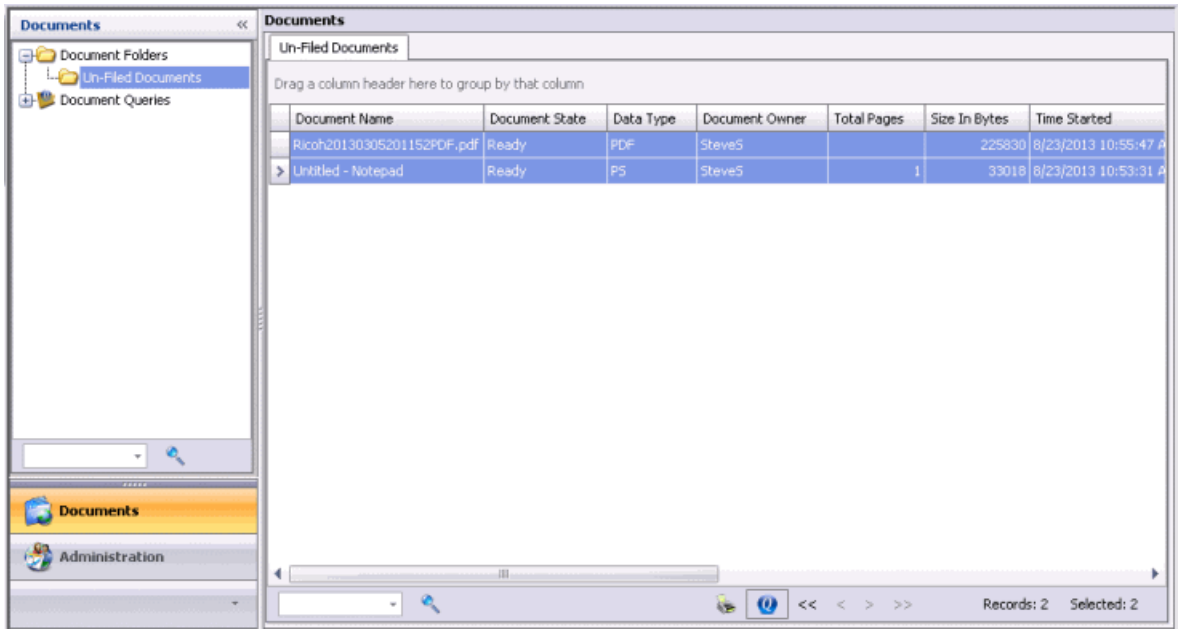
Documents

Learning About the Documents Application

The Documents application is used to manage the flow of documents in Nuance Output Manager. In the navigation pane, click the **Documents** button to open the Documents application. The navigation pane displays a configurable **Documents** tree showing all of the document folders and saved document queries. From the tree, you can create document folders for organizing documents. Under the Document Queries folder, you can also create queries for quickly locating documents based on their properties and query folders for organizing queries. Document folders, query folders, and queries can be moved using drag-and-drop functionality.

Click the area of the window you want to learn more about.



1. *Navigation Pane* on page 204
2. *Console window* on page 205

Navigation Pane

When you right-click an item in the navigation pane, the following options will display. The options listed will vary depending on if a document folder, query folder, or document query is selected.

Navigation Pane Option	Description	See
Open	Displays a grid view of the selected i tem. If a document folder is selected , all of the documents contained in th e folder will be listed. If a document	

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Navigation Pane Option	Description	See
	query is selected, all of the document s that meet the criteria of the query w ill be listed.	
Open in New Tab	Opens the document folder or docum ent query in a new tab.	• *Managing Document Folders*
New Folder	Creates a new document folder or q uery folder under the selected folder . A new folder entry titled UnNamed will appear in the tree. Type the new folder name and press enter to create the folder. By default the new folder will inherit the security settings of its parent folder.	• *Creating Folders*
New Query	Creates a new document query under the selected query folder. Displays th e **Document Query Tool** dialog box.	• *Create Document Queries*
Rename	Renames the selected folder.	• *Rename Folders*
Delete	Deletes the selected folder or query. Folders cannot be deleted if they con tain any documents, queries, or subf olders.	• *Delete Folders*
Security	Opens the **Security Configuration dialog box** for updating the security settings. This will define the type of access users and groups have to the d ocuments either contained in the fold er or that meet the query criteria.	• *Security Configuration dialog box* • *Configure Security for Documents*

Console window

The console window displays a tabbed view of the Documents tree selection. When a document folder is selected in the tree, the Documents grid will display listing all of the documents in the folder. Retained documents will appear in a blue shaded row. When a query is selected in the tree, the Documents grid will list all of the documents whose properties match the query. Notice the Documents grid is in a tab page control. By default, navigating in the tree will replace the information in the active tab. Document queries can be opened in a new tab, by right-clicking a query in the tree and clicking **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

Grid shortcut menu options

When you right-click a document in the grid, the following options will display.

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Grid Option	Description	See
View	Displays the selected document in the Viewer of your choice. The submenu options that display vary depending on the type of document selected. **OM Viewer** — Displays the selected document in the Output Manager Viewer. **Windows Default Viewer** — Opens the application installed in Windows that Windows has assigned to open that file type.	• *View documents*
Properties	Displays the properties for the selected documents. You can edit the document properties from the **Document Properties** dialog box.	• *Edit document properties* • *Document Properties dialog box*
Delete	Deletes the selected document from Nuance Output Manager.	• *Delete documents*
Hold	Sets the state of the selected document to Hold. The document cannot be routed.	• *Change the document state*
Ready	Sets the state of the selected document to Ready. The document is ready to be routed.	• *Change the document state*
Reprint	Reprints the selected document at a scheduled time. You can choose to reprint the document using the original page range, clear the current page range and print the entire document, or reprint the document with a new page range.	• *Reprint documents*
Restore	Restores the selected retained document to an active status. The document can now be automatically routed to a destination.	• *Restore documents*
Route to Destination	Sends the selected document to the destination of your choice. You can select one or more destinations in the tree.	• *Manually route documents to a destination*
Assign to Document Folder	Sets the location the document will reside in Nuance Output Manager. A	• *Assign documents to a folder*

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Grid Option	Description	See
	dialog box will display listing all of t he document folders.	
Assign Profiles	**Assign Failover Profile** — Assigns a failover profile to documents. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents). **Assign Library Filing Profile** — Assigns a library filing profile for sending documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting. **Assign Notification Profile** — Assigns a notification profile to documents. This will send notifications when specific events occur in the document life cycle. **Assign Output Process** — Assigns an output process to documents. Output processes are used to modify document data while sending a document to a destination.	• *Assign a failover profile* • *Assign a library filing profile* • *Assign a notification profile* • *Assign an output process*
Billing Accounts		
Package Management	Manages document grouping (or asso ciation with one another) for purpose s of merging, zipping, or routing as a group. The **Package Manager** dialog box is displayed.	• *Package Manager dialog box*
Run Ad hoc Action	Configures and performs ad hoc rule actions on one or more selected docu ments. These actions have no associa ted rule or conditions. The configure d action is performed against the doc uments unconditionally. You can con figure the following actions. **Create Package** — Configures a package of documents.	• *Create Package dialog box* • *Zip Package dialog box* • *Merge Package dialog box*

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Grid Option	Description	See
	Zip Package — Zips the merged document or any other documents in Nuance Output Manager. **Merge Package** — Configures the document properties of the merged file.	
Run Ad hoc Rule	Allows you to run any of the rules l isted in the submenu. Only rules wi th the **Allowed for document right click** option selected on the **Ad Hoc Rule** dialog box are displayed.	• *Ad Hoc Rule dialog box*
View messages	Displays all messages related to th e selected document in the **Message Console**.	• *Message Console*
Schedule	**Schedules** the selected document to print on the day and time of your cho ice.	• *Schedule output*
Set Retain Period	Assigns a retain period to documents. Retain periods determine how long d ocuments will be retained.	• *Assign a retain period*
Filters	**Save Applied Filter** — Saves the applied document filter. **Load Filter** — Opens the **Document Filters** dialog box for selecting a saved filter. **Create New Filter** — Creates a new filter for the grid. Displays the **Filter Builder** dialog box.	• *Filtering on Values*
Queries	**Edit Query** — Opens the **Document Query Tool** for modifying the current query. **Load Query** — Opens the **Document Queries** dialog box for selecting a saved query. **Create New Query** — Opens the **Document Query Tool** for creating a new query. **Save Current Query** — Saves the current query. The **Document Queries** dialog box displays. You can apply saved queries by right-clicking the grid and selecting **Queries** > **Load Query**.	• *Create document queries*

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Grid Option	Description	See
Layouts	**Important:** Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. **Delete layout** — Allows for deleting layout files created by the current user. Load layout — **Allows for loading layout files created by the current user.** **Reset layout** — Abandons any unsaved grid changes and resets the grid to the default settings. The default settings are configured in the **Configure Document Properties Utility**. **Save layout** — Saves the current grid settings to a layout file for the current user.	• *Use grid layouts* • *Configuring Global Document Properties* • *Configure Document Properties Utility*

Grid status bar options

The following are the options that display in the status bar below the grid.

Status bar option	Description
Search	Searches the grid. To search, type the text you want to fi nd and press Enter or click the Search image. If the text i s found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow y ou to stop searching, move to the previous occurrence, a nd move to the next occurrence.
Print button	Prints the contents of the grid.
Query button	Displays the query tool for creating a custom query.
Refresh Query button	Refreshes the current query.
Cancel Query Mode button	Cancels the current query.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow b utton (<) to go to the previous page, the right arrow butto n (>) to go to the next page, and the double right arrow b utton (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

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Document states

The following are the possible document states.

Document State	Description
Hold	The document cannot be routed to a destination.
Ready	The document is ready to be routed. The document will b egin printing when its routing criteria matches that of a d estination and it is the next document in the queue.
Incomplete	The document is being received into a source and is goin g through a transformation (for example, page count) and /or being scheduled. It will remain in this state until the tr ansform and/or scheduling is completed.
Error	The document cannot be successfully routed to a destinat ion. The destination may be disabled or unavailable.
Busy	The document has begun printing to a destination but wil l remain in this state until printing is completed
Retry Pending	The document has been routed to a destination. If a failo ver profile has been configured, the document will conti nue to retry routing to this destination based on the failo ver criteria.
Scheduled	The document is scheduled to be sent to a destination.

Learning About the Library Application

The Library application allows for long-term storage of documents that have been received into Nuance Output Manager. Based on user permissions, library documents can be viewed, reprinted, and so on. Documents are placed in the Library by sending them to the Nuance Output Manager Document Library destination that was created by default for you. Documents are assigned to library folders in a dynamic manner using a library filing profile. The filing profile can be assigned by the Nuance Output Manager Document Library destination or *business rules*.

Click the area of the window you want to learn more about.

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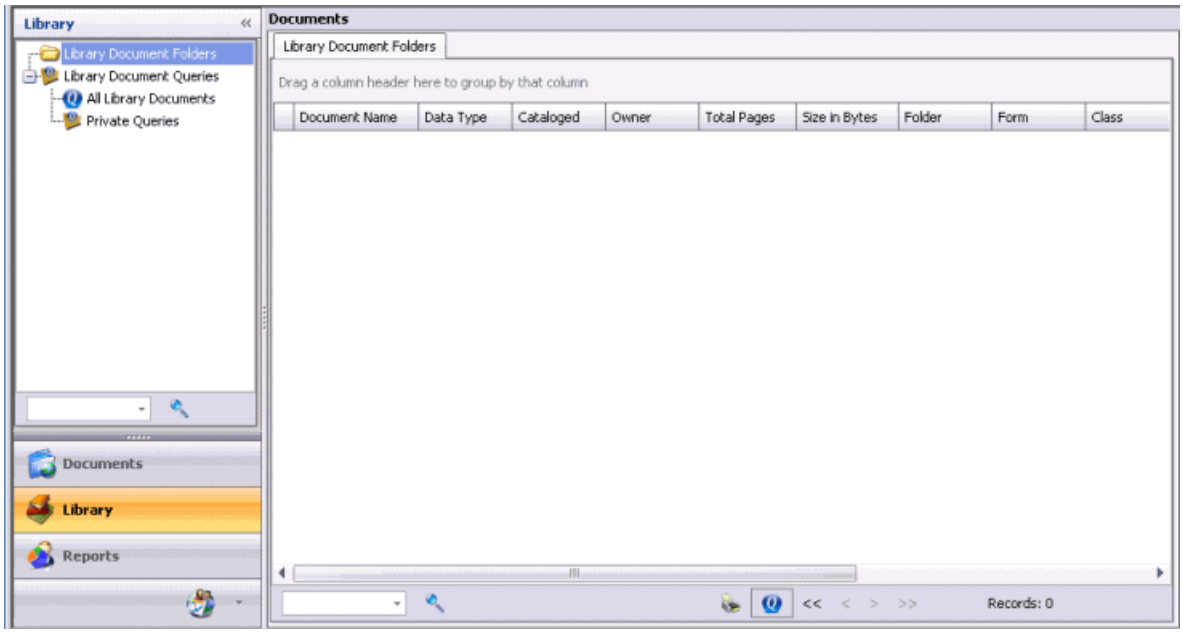

1. *Navigation pane* on page 211
2. *Console window* on page 212

Navigation pane

In the navigation pane, click the **Library** button to open the Library application. The navigation pane displays a configurable Library tree showing all of the library document folders and saved queries. From the tree, you can create library folders for organizing library documents. Under the Library Document Queries folder, you can also create queries for quickly locating documents based on their properties and query folders for organizing queries. Library folders, query folders, and queries can be moved using drag-and-drop functionality.

When you right-click an item in the navigation pane, the following options will display. The options listed will vary depending on if a library folder, query folder, or query is selected.

Navigation Pane Option	Description	See
Open	Displays a grid view of the selected i tem. If a library folder is selected, all of the documents contained in the fo lder will be listed. If a query is select ed, all of the documents that meet the criteria of the query will be listed.	
Open in New Tab	Opens the library folder or query in a new tab.	
New Folder	Creates a new library folder or query folder under the selected folder. A ne w folder entry titled UnNamed will a ppear in the tree. Type the new folde r name and press enter to create the f older. By default the new folder will	• *Create Folders*

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Navigation Pane Option	Description	See
	inherit the security settings of its par ent folder.	
New Query	Creates a new query under the select ed query folder.	• *Create document queries*
Rename	Renames the selected folder.	• • *Rename Folders*
Delete	Deletes the selected folder or query. Folders cannot be deleted if they con tain any documents, queries, or subf olders.	• *Delete Folders*
Security	Opens the **Security Configuration dialog box** for updating the security settings. This will define the type of access users and groups have to the d ocuments either contained in the fold er or that meet the query criteria.	• *Security Configuration dialog box*

Console window

The console window displays a tabbed view of the Library tree selection. When a library folder is selected in the tree, the Library grid will display listing all of the documents in the folder. When a query is selected in the tree, the Library grid will list all of the documents whose properties match the query. Notice the Library grid is in a tab page control. By default, navigating in the tree will replace the information in the active tab. Queries can be opened in a new tab, by right-clicking a query in the tree and clicking **Open in New Tab**. Your tree selection, open tab pages, and console window settings will be saved for the next time you open the application.

Grid shortcut menu options

When you right-click a document in the grid, the following options will display.

Grid Option	Description	See
View	Displays the selected document in the Viewer of your choice. The submenu options that display vary depending on the type of document selected. **OM Viewer** — Displays the selected document in the Output Manager Viewer. **Windows Default Viewer** — Opens the application installed in Windows that Windows has assigned to open that file type.	• *View documents*
Delete	Deletes the selected document from Nuance Output Manager.	• *Delete documents*

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Grid Option	Description	See
Assign to Library Folder	Sets the location the document will r eside in the Library. A dialog box w ill display listing all of the library fo lders.	• *Assign documents to a folder*
Queries	**Edit Query** — Opens the **Document Query Tool** for modifying the current query. **Load Query** — Opens the **Document Queries** dialog box for selecting a saved query. **Create New Query** — Opens the **Document Query Tool** for creating a new query. **Save Current Query** — Saves the current query. The **Document Queries** dialog box displays. You can apply saved queries by right-clicking the grid and selecting Queries | **Load Query**.	• *Create document queries*
Layouts	**Important:** Layout files are saved for the logged in user. You will only have access to load and delete the layout files you create. **Delete layout** — Allows for deleting layout files created by the current user. **Load layout** — Allows for loading layout files created by the current user. The **Load Layout** dialog box is displayed. **Reset layout** — Abandons any unsaved grid changes and resets the grid to the default settings. The default settings are configured in the Configure Columns Utility. **Save layout** — Saves the current grid settings to a layout file for the current user.	• *Delete grid layouts* • *Load grid layouts* • *Save grid layouts*

Grid status bar options

The following are the options that display in the status bar below the grid.

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Status bar option	Description
Search	Searches the grid. To search, type the text you want to fi nd and press Enter or click the Search image. If the text i s found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow y ou to stop searching, move to the previous occurrence, a nd move to the next occurrence.
Print button	Prints the contents of the grid.
Query button	Displays the query tool for creating a custom query.
Refresh Query button	Refreshes the current query.
Cancel Query Mode button	Cancels the current query.
Paging buttons	Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow b utton (<) to go to the previous page, the right arrow butto n (>) to go to the next page, and the double right arrow b utton (>>) to go to the last page.
Number of Records	Displays the number of records in the grid.

Managing Documents

From the *Output Manager Console* you can start, stop, view, and delete documents. You can route documents to destinations and schedule documents to print at a specific time. You can control documents from the Output Manager Console using the following procedures.

⚠ To perform these tasks, you must have the appropriate document folder *permissions*.

- *Change the document state*
- *View documents*
- *Manually route documents to a destination*
- *Edit document properties*
- *Assign documents to a folder*
- *Delete documents*
- *Reprint documents*
- *Restore documents*
- *Schedule output*
- *Assign a failover profile*
- *Assign a library filing profile*
- *Assign a notification profile*
- *Assign an output process*
- *Assign a retain period*
- *Run an ad hoc rule on documents*
- *Run an ad hoc action on documents*
- *Manage document packages*

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- *View a document's history*

How to Change the Document State

Perform this procedure to change the document state.

1. From the Documents grid, right-click the documents you want to change.

   You can select one or more documents at a time.
2. Select one of the following state options from the menu.
   - Hold — Sets the state of the selected document to Hold. The document cannot be routed.
   - Ready — Sets the state of the selected document to Ready. The document is ready to be routed.

How to View Documents

Perform this task to view a document.

1. From the Documents grid, right-click the document you want to view.
2. Click **View** and then select the appropriate submenu viewing option.

   The available options vary depending on the type of document selected.

   Note: You can use the **Viewer Configuration** dialog box to define and configure the Viewer utilities that display in the menu. To access the **Viewer Configuration** dialog box, from the Output Manager Console menu bar, select **Tools** > **Configure Viewer**.

How to Manually Route Documents to a Destination

Use this procedure to manually route documents to destinations from the Output Manager Console.

1. In the Documents grid, select one or more documents
2. Right-click the selection and click **Route to destination**.
3. Select one or more destinations in the tree.
4. Use the SHIFT and CTRL keys to select multiple destinations.

   Destination groups cannot be selected. To quickly locate a destination, you can search using the search box below tree.
5. Determine if you need to select the **Enable offline destinations** check box.

   If you route a document to a destination that is offline, selecting this option will automatically bring the destination online to receive the document. You can determine the offline destinations by looking at the images in the tree. The images for offline destinations are gray with a red no symbol (for example, an offline folder destination would display as).
6. Click **OK**.

   Note: You can automatically route to a destination by including a default destination in the source configuration and creating a business rule to route to a destination.

How to Edit Document Properties

Perform this procedure to edit properties of a document.

1. From the Documents grid, select one or more documents, right-click and click **Properties**.
   This opens the **Document Properties** dialog box
2. In the **View** list, choose the document properties/print preferences that display in the grid. You can select from the following options:

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Option	Description
All	Displays all available document properties in the grid.
Standard	Displays only the document properties that the destination is capable of using. This is the default view.
Only Set Values	Displays only the document properties that contain a value (have been configured). This is an easy way to see the settings that are going to be applied to the document.

3. In the grid, expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains.

   The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

4. In the **Mode** column, select how the property should be applied when a document is sent to a destination. Click in the grid cell and choose from the following options:

Option	Description
Always Apply	Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
Apply Conditionally	Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
Informational Only	Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

5. In the **Value** column, specify the document property value.

   You can use functions to insert and extract data as necessary. Only the allowed values configured in the **Configure Document Properties** utility will be available for selection. If `(Excluded)` displays next to a value, then that value was excluded by the currently assigned destination on the **Destination Capabilities** dialog box.

6. Click **OK** to save changes.

How to Assign Documents to a Folder

Use this procedure to manually assign documents to document folders.

Assigning document folders allows you to place specific documents in any of the document folders defined in the Documents or Library tree.

1. Select one or more documents, then:

   - In the Documents application, right-click the selection and click **Assign to Document Folder**.

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- In the Library application, right-click the selection and click **Assign to Library Folder**.

2. Select a folder and click **OK**.

   To quickly locate a folder, you can search using the search box below tree.

How to Delete Documents

Perform this procedure to delete a document.

1. In the **Documents** grid, right-click one or more documents that you want to delete.
2. Click **Delete** on the shortcut menu.

How to Reprint Documents

Use this procedure to reprint documents.

From the documents grid you can reprint documents that have been retained. Retained documents appear in the Documents grid with a blue background. You can reprint all or part of the document and schedule the reprint date and time.

1. From the Documents grid, select one or more retained documents
2. Right-click the selection and click **Reprint** on the shortcut menu.

   You can easily locate retained documents as they are shown with a blue background.
3. In the **Destinations** and **Sources** applications, click the **Retained** tab in the **Documents** grid.
   This opens the **Reprint Document** dialog box.
4. Under **Reprint options**, you can reprint using one of the following methods.
   - Reprint the document using the original page range specified.
   - Clear the current page range and print the entire document.
   - Reprint the document by specifying a new page range. If you choose to override the current page range, the **Document page range** option becomes available for you to specify the new page range. Enter the pages to print using the following formats, without quotation marks (''). You can enter one or more page ranges using a comma to separate the values (for example, 3-6,1,18-).
     - "*n*-*n*" — To print a specific page range
     - "-*n*" — To print from the beginning of the document to a specific page
     - "*n*-" — To print from a specific page to the end of the document
     - "*n*" — To print a specific page
5. Under **Schedule reprint time**, specify the date and time the document will reprint.
6. Click **Destinations** to select the destinations where you want to print the document.
7. In the **Route to Destination** dialog box, select one or more destinations in the tree.

   Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. To quickly locate a destination, you can search using the search box below tree.
8. Determine if you need to select the **Enable offline destinations** check box.

   If you route a document to a destination that is offline, selecting this option will automatically bring the destination online to receive the document. You can determine the offline destinations by looking at the images in the tree. The images for offline destinations are gray with a red no symbol (for example, an offline folder destination would display as).
9. Click **OK**.
10. Click **Submit**.

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How to Restore Documents

Use this procedure to restore documents back to their previous source.

Documents that have been routed to a destination are considered Retained. Within the Documents grid, these records will show highlighted in blue and have a document state of Hold.

1. In the Documents grid, right-click one or more documents you want to restore.
2. Click **Restore** on the shortcut menu.

After you complete this procedure, the documents will no longer be retained. They will be restored to their previous source.

How to Schedule Output

Use this procedure to schedule a document to print at a specified day and time.

You can schedule documents to print at a specific time. For example, you can schedule certain jobs to print on a specific day of the week or you can schedule large jobs to print at night. Documents become eligible to print at the specified time. They might not print at the exact time, depending on how many other eligible documents are ahead of them in the queue.

1. From the Documents grid, select one or more documents.
2. Right-click the selection and click **Schedule**.
3. From the **Schedule** dialog box, select the specific day and time to print the documents.
4. Click **OK** to save the changes.

How to Assign a Failover Profile

Use this procedure to assign a failover profile to documents.

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents).

1. From the Documents grid, select one or more documents
2. Right-click the selection and click **Assign Profiles** > **Assign Failover Profile**.
   This opens the **Set Failover Profile** dialog box.
3. In the **Profile** list, select the appropriate failover profile, or click **New** to create one using the **Failover Profile** dialog box.

   In this dialog box, you can determine what should happen if all of the retries fail and when to place the document in an error state.
4. You can click **Edit** to edit the selected profile, or click **Manage** to display the **Manage Failover Profiles** dialog box, which lists all of the defined profiles.

   When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
5. After you select a profile, click **OK**.

Assigning a Library Filing Profile

Use the following procedure to send documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.

1. From the Documents grid, select one or more documents.
2. Right-click the selection and click **Assign Profiles** > **Assign Library Filing Profile**.

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This opens the **Set Library Filing Profile** dialog box.

3. In the **Profile** list, select the appropriate library filing profile, or click **New** to create one from the **Document Library Profile** dialog box.
4. Complete the following steps to configure a library profile.
   a) Click **New**.
   This opens the **Document Library Profile dialog box**.
   b) Specify the library profile **Name** and **Description**.
   c) To determine where documents will be placed in the library, click the Browse button to select an existing **Base folder**.

   If desired, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text, one or more document properties, and functions.

   - To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. Some example document properties are date/time, document name, data type, and so on.
   - To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

     Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

   You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a sub folder of the folder above it in the list.
   d) To send an email notification when a document is sent to the library, select the **Send email notification upon filing** check box and click **Email**.

   Configure the email setting in the **Send Email** dialog box.
   e) Specify the file store for documents sent to the library.

   You can choose to leave them in their current file store or move them to a specified file store.
   f) In the **Purge documents** box, specify how long documents should stay in the library before they are deleted.
   g) Click **OK**.
5. After you select the profile, click **OK**.

Assigning a Notification Profile

Use this procedure to assign a notification profile to documents.

Notification profiles will send notifications when specific events occur in the document life cycle. Notifications are sent according to defined notification profiles. Notification profiles specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. For example, you can configure a pop-up to display after a document prints successfully.

1. In the Documents grid, select one or more documents.
2. Right-click the selection and click **Assign Profiles** > **Assign Notification Profile**.
   This opens the **Set Notification Profile** dialog box.
3. In the **Profile** list, select the appropriate notification profile, or click **New** to create one using the **Notification Profile dialog box**.

   Complete the following steps to create a notification profile.

   a) Click **New**.
   This opens the **Notification Profile** dialog box.

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b) Specify the library profile **Name** and **Description**.

c) If this profile will send email notifications, select the **Email profile** that will be used with those notifications.

You can select an email profile from the list or click the Browse button and mange profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles using the **Outbound Email Profile dialog box**.

d) Click directly in the **Notifications** grid to configure the notifications that will be sent. You will need to configure each grid column. You can add and remove notifications (grid rows) using the **Add** and **Remove** buttons.

- **When the document** — Select when a notification will be sent. You can choose to send a notification when a document **Arrives**, **Prints Successfully**, **Prints on Failover Destination**, or **Is In Error State**.
- **Send notification via** — Select how the notification will be sent and displayed. You can choose to send notifications using the **Tray Client Pop-up** or as an **Email Message**.
- **Notify owner** — Choose if the document owner will be sent a notification.
- **Recipients** — Click the Browse button to select who will receive the notification. You can select users and groups from the **User and Group Selection** dialog box. If the user or group you want is not listed, click **More Users** to search for additional users. See the *Adding users and groups to Nuance Output Manager* topic for detailed procedures on adding users.
- **Message** — Enter the notification text. You can insert document properties and functions in the body text. To insert document properties, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. Document properties will display enclosed in brackets ([]). The values of the properties will display in the notification. To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

e) Click **OK**.

4. After you have selected your profile, click **OK**.

How to Assign an Output Process to a Document

Use this procedure to assign an output process to documents.

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

1. In the Documents grid, select one or more documents.
2. Right-click the selection, and click **Assign Profiles** > **Assign Output Process**.
   This opens the **Set Output Process** dialog box.
3. In the **Profile** list, select the appropriate output process or click **New** to create one from the **Process Designer** window.

   See the *Working with output processes* topic for output process procedures.

   You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Output Process Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
4. After you have selected your profile, click **OK**.

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How to Assign a Retain Period

Use this procedure to assign a retain period to documents.

Retain periods determine how long documents will be retained.

1. From the Documents grid, select one or more documents
2. Right-click the selection and click **Set Retain Period**.
   This opens the Set Retain Period dialog box.
3. Set the retain period.
   - Use the **Retain for** options to retain documents for a specified time period. Time periods can be specified in years, months, days, hours, and minutes.
   - Use the **Retain until** options to retain documents until a specified date and time.
4. Click **OK**.

How to Run an Ad Hoc Rule on Documents

Use this procedure to run ad hoc rules on documents from the Documents grid.

1. From the Documents grid, select one or more documents.
2. Right-click the selection and click **Run Ad hoc Rule**.

   You can run any of the rules listed in the submenu. Only rules with the **Allowed for document right click** option selected on the **Ad Hoc Rule** dialog box are displayed.
3. When you are prompted whether to run the ad hoc rule on the selected documents, click **Yes**.

How to Run an Ad Hoc Action on Documents

Use one of the following procedures to configure and perform ad hoc rule actions on documents from the Documents grid. You can create a package of documents, create a zip package, or create a merge package.

- *Create a package of documents*
- *Create a zip package*
- *Create a merge package*

To create a package of documents

Use this action to create a package of documents. This puts selected documents in a single document package.

1. From the Documents grid, select one or more documents, right-click and click **Run Ad hoc Action** > **Create Package**.
   This opens the **Create Package** dialog box.
2. Enter the **Naming prefix** for the package document.

   This prefix will be added to all documents in the package.
3. If you want to group documents in the package, select **Grouping property** and select the property to group by in the drop-down list.
4. In the **Ordering properties** list, select the document properties that will control the order the documents are packaged.

   Note: Only the allowed properties selected on the **Configure Document Properties Utility** will display in the **Ordering properties** list.

   As you select properties, they are added to the **Selected order** list.

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5. Select properties in the **Selected order** list and use the **Move up** and **Move down** buttons to configure the property order.
6. Click **OK**.

To create a zip package

Use this action to zip the selected documents.

1. In the Documents grid, select one or more documents, right-click and click **Run Ad hoc Action** > **Zip Package**. This opens the **Zip Package** dialog box.
2. Enter the **Zip File Name** in the box.
3. If this rule will be used after all documents have been received into Nuance Output Manager, select the **Used as a post-processing action** check box.
4. In the **Original documents** box, select what happens after the zipped file has been created.

   You can leave documents in the spooler, move them to retain them, or delete them.
5. Click **OK**.

To create a merge package

Use this action to create a merged file.

1. In the **Documents** grid, select one or more documents
2. Right-click the selection, and click **Run Ad hoc Action** > **Merge Package**.
   This opens the **Merge Package** dialog box.
3. Next to **Transform**, click the **Configure** button to configure the transform.
4. In the **Server** box, click the licensed transform server that you would like to use.
5. In the **Transform package** box, you can select an existing transform package or you can complete the following steps to create a transform package.
   a) Click **New**.
   b) On the **General** tab, enter the transform package **Name**.
   c) Select the transform package type.
   d) If you select a third-party conversion tool, verify that the **EXE path** is set to the correct folder. The default EXE path is @EOMTransformDir. To change the path, type the new path the box or click the browse button (**...**).
   e) Set the **Logging State**.

      The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and preproduction testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
   f) On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
      - To configure a profile, click the ellipsis button in the **Modify/New** column for the appropriate formats. In the **Configure Filter Profile** dialog box, configure the profile as needed. The profile contains a communications and printer definition section. See the *Configuring a CpMillProfile resource* topic for instructions on configuring a filter profile.
      - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
   g) On the **Resources** tab, specify where the transform software will find the resources needed for the transformation.

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For example, PDF fonts are usually found at the location of an Adobe installation.

h) On the **Fonts** tab, you can control the font mapping of input fonts to output fonts.

The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.

i) Click **OK** to create the transform package.

6. Select the **Override input filter profile assigned to document** check box to use the filter profile in the transform package.
   - Select this check box override the input filter profile assigned to the document.
   - Clear this check box if you want to use the filter profile configured in the transform package.
7. In the **Output format** list, click the format of the output file.
8. Configure the conversion of each input format in the **Input formats** grid, and then click **OK**.
   - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select **Do Not Transform**.
   - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column.

     To configure a custom input format, click the browse button (**...**) in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output** tab or **PDF output** tab will also display.
9. When the transform configuration is complete, click **OK**.
   The **Merge Package** dialog box indicates the transform has been configured.
10. Complete the following steps to configure **Package boundaries**.

    a) Select **Package boundaries** and click **Configure**.
    The **Package Boundary Fields** dialog box is displayed.

    b) From the grid, expand the sections to select the document properties that will be used as package boundaries.

    c) Click **OK**.

    Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.
11. Under **Merged Document Properties**, determine if you want to use the document properties from the first page in the documents or the last page in the documents.

    Selecting custom properties is not yet available.
12. Complete the following steps to configure **Exception fields**.

    a) Select **Exception fields** and click **Configure**.
    This opens the **Exception Fields** dialog box.

    b) From the grid, expand the sections to select the document properties that will be used as exception fields.

    c) Click **OK**.

    Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).
13. Determine if you need to **Add blank pages for duplexing**.

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14. Determine what will happen to the **Original documents** after the merged file has been created. You can leave them in the spooler, move them to retain, or delete them.
15. Click **OK**.

How to Manage Document Packages

The Package Manager is used to manage which documents are contained in a package. “Package” is an Nuance Output Manager concept used as a means of grouping documents together for the purposes of routing to a destination as a group, running ad hoc rules on the group, and so forth. By default, each document arriving in Nuance Output Manager will be the only document in its own package bearing the same name as the document.

1. To open the Package Manager, in the Documents list, first select one or more documents
2. Right-click the selection and click **Package Management**.

   Only the packages associated with the selected documents will be available for management.

Completing this procedure opens the **Package Manager dialog box**.

Use the following procedure to move documents from one package to another, remove documents from a package to be in a separate package, and create new packages.

To create packages

1. Click **New Package**.
2. Type the package name in the dialog that displays and click **OK**.

The new package is added to the bottom of the **Packages** list.

To remove documents from packages

1. In the **Package documents** list, select the documents you want to remove.
2. Click the > button.

The documents are removed from the package and placed in the **Removed documents** list.

To add documents to packages

1. In the **Packages** list, select the package to which you want to add documents.
2. Click the < button.

The documents are added to the selected package.

To move documents between packages using drag-and-drop

1. In the **Package documents** list, select the documents you want to move.
2. Click and drag the selected documents to the desired package in the **Packages** list.

How to View a Document History

Use this procedure to view a document history.

- In the Documents grid, right-click a document and click **View messages**.

This displays the *Message Console* listing all messages related to the selected document.

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Working with Documents

From the Output Manager Console, you can manage the flow of documents from Nuance Output Manager to a destination.

Nuance Output Manager supports a variety of document types, such as PCL, PS, PDF, Text, TIFF, JPG, PGN, AFP, IPDS (not available for new sales), LCDS, and so on. The system also supports transforming documents between these print description languages (PDL).

- *Manage document folders*
- *Configure security for documents*
- *Create document queries*
- *Search for documents*

How to Manage Document Folders

In both the Documents and Library applications, documents are organized in folders. These folders define the permissions that users and groups have over documents.

- *Create folders*
- *Move folders*
- *Rename folders*
- *Delete folders*
- *Search for folders*

To create folders

1. In the **Documents** or **Library** tree, right-click a folder and click **New Folder**. A new folder titled UnNamed is added to the selected folder.
2. In the edit field, type the name of the new folder and press Enter.
   The new folder automatically inherits the permissions of the parent folder.

To move folders

1. In the **Documents** or **Library** tree, select the folder you want to move.
2. Drag the folder in the desired tree location.
   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the folder will be placed.

To rename folders

1. In the **Documents** or **Library** tree, right-click a folder and click **Rename**.
2. In the edit field, type the new folder name and press Enter. To cancel the rename, press Esc.

To delete folders

1. In the **Documents** or **Library** tree, right-click the folder you want to delete.
2. Click **Delete** on the shortcut menu.

   Note: All of the objects must be removed before the folder can be deleted.

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To search for folders

1. In the search box below the **Documents** or **Library** tree, type the text you want to find and press Enter or click the Search image.
   Nuance Output Manager will start at the top of the tree and search for the text. Each time the text is found the selected item will be highlighted in the tree and the item will open in the console window.
2. If more than one search result is found, click the next and previous arrow buttons that appear in the search panel to navigate between search results.

How to Configure Security for Documents

Complete this procedure to assign document permissions.

Nuance Output Manager security for the Documents and Library application begins at the root of the tree, the Document Folders or Library Document Folders group. The Documents and Library trees consist of folders which are used to organize documents.

Nuance Output Manager security is provided by adding a Microsoft Windows user or user group to the folder and assigning permissions to that user or user group. These Nuance Output Manager permissions define the type of access users and user groups have to the documents within the folders. Once the Nuance Output Manager security (Microsoft Windows users, user groups, and document permissions) is set in a folder, the Nuance Output Manager security is inherited by all the objects in that folder. When a new document is added or a folder is created, its security is automatically the same as its parent folder's security (that is, the new document inherits its security from its parent folder).

Note: To begin configuring document security, start by assigning the desired document permissions in the Document Folders or Library Document Folders. To view documents in the grid, users or user groups must be assigned the **Allow user to see Documents in list** permission in the Document Folders or Library Document Folders. Users not assigned this permission in that folder will not see any documents or folders even though they may have been given permissions for the specific folder.

1. In the Output Manager Console, select the **Documents** and **Library** application in the navigation pane.
2. In the tree, right-click the folder you want to configure and click **Security**.
   This opens the **Security Configuration** dialog box. To access this dialog box, you must be a member of the local Administrators group. Users with these rights can add and remove users or groups and modify the assigned permissions.

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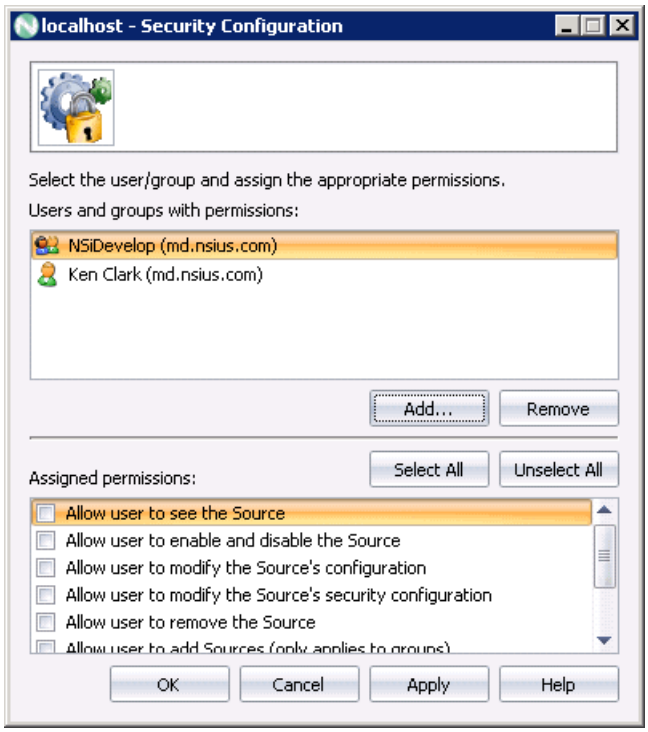

3. In the **Inherit permissions from the parent** box, choose whether to inherit permissions from the parent folder or remove inheritance. Click the browse button (**...**) to configure inheritance.

   By default, folders are configured to inherit permissions from the parent folder.

   Tip: It is good practice to assign rights using inheritance, as it allows administrators to easily assign and manage permissions. Blocking inheritance is useful when documents need to be seen by just a few users. If you plan to block inheritance, make sure the users that need access to the blocked document folder are in the security settings for all of its parent groups, including Document Folders or Library Document Folders. If this is not done then those users will not be able to see the folder. Also remember to remove the users and user groups that should not have access to the folder.

4. In the **Users and groups with permissions** list box, select the appropriate user or group in the list.

   If you want to set permissions for a user or group that does not appear in the list, click **Add**. In the **User and Group Selection dialog box**, select the users/groups you want to add and click **OK**. If the user/group is not listed, click **More Users** to locate the user. From the list you can choose to add OM users, LDAP users, or Windows users. You can also choose to import LDAP users. Once users are added, they are placed in the Nuance Output Manager database and always be listed in the future.

   The **Assigned permissions** list box will display the assigned permissions for the selected user.

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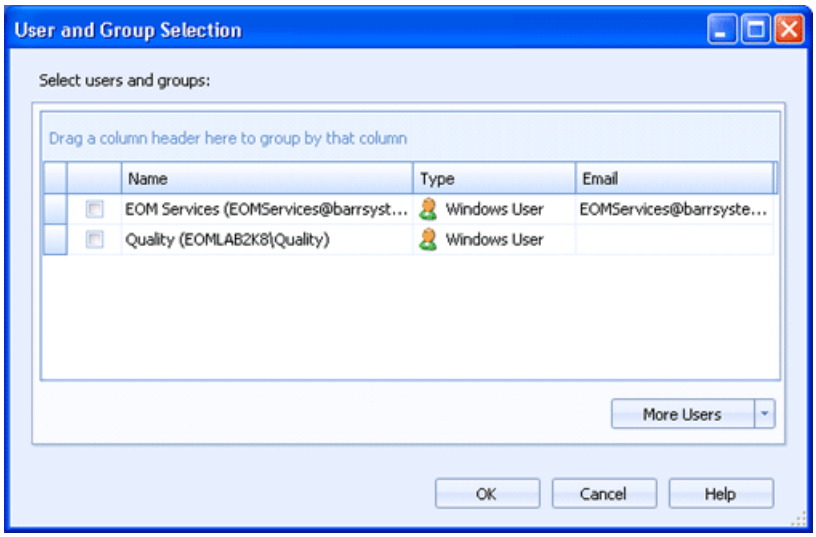

5. In the **Assigned permissions** box, select or clear the permissions for the selected user/group. Click **Select All** or **Unselect All** to easily assign or remove all permissions.

   If you notice permissions that are selected and disabled, then the user/group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first turn off inheritance for the folder.

   The permissions assigned to a folder will be inherited for all of the objects contained in that folder, except for the ones that have inheritance blocked.

6. After you complete changes to the permissions, click **OK**.

Create Document Queries

Perform this procedure to create document queries.

The Documents and Library applications allow you to create document queries. Queries are used to quickly locate documents based on their properties. Queries can be run from the Documents and Library tree and grid. They can be run ad hoc or saved for future use.

1. Open the **Document Query Tool** using one of the following methods.
   - In the Documents or Library tree, right-click one of the document query folders and click **New Query**. The new query will be created under the selected folder.
   - Right-click in the grid and click **Queries** > **Create New Query**
   - In the grid, click the queries button (**Q**) below the grid. If a query is currently applied to the grid, the query statements will be listed.
2. To create a query statement, click the + button next to the AND operator. To select the column, click the column name link in the condition and select the appropriate column from the list.
   All available columns will display in the list.
3. Click the operator link in the condition and select the appropriate comparison operator from the list.

   The comparison operator list displays only the operators supported by the current column's data type. For example, the Priority column is of the numeric type so the operator list doesn't display the 'Begins with' operator and other operators that are related to the string type.
4. Click the **<enter a value>** link and enter a value in the box.

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5. To add additional conditions, click the + button next to the group's AND operator. This will create new conditions below the current one. Complete each condition statement using the steps above.
6. Click **OK** to query data using the created query statement.

   Tip: You can create more advanced queries containing multiple logical (Boolean) operators. To change the root logical operator, click the current AND operator and select the appropriate operator from the list. You can then add a new query statement group by clicking the operator and selecting **Add Group**. You can add multiple groups containing multiple conditions. Complete each group using the steps above.
7. If you created the query from the grid, you can save the query by right-clicking in the grid and clicking **Queries** > **Save Current Query**.
   - You will select the query folder and enter a query **Name**.
8. You can load saved queries by right-clicking in the grid and clicking **Queries** > **Load Query**.
   - From the dialog box, select the query you want to open and click **OK**.
9. To refresh the query, click the **Refresh Query** button below the grid.
10. To cancel the query, click the **Cancel Query Mode** button below the grid.

How to Search for Documents

Complete the following steps to search for documents in the Documents grid. You can also search the **Documents** grid that appears in both the **Destinations** and **Sources** applications.

1. In the Output Manager Console, select the **Documents** and **Library** applications in the navigation pane.
2. In the tree, select the appropriate document folder.
3. In the search box below the grid, type the text you want to find.
4. Click the column in the grid you want to search
5. Press Enter or click the Search image.

If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

How to Configure Global Document Properties

Perform this procedure to configure global document properties.

In the **Configure Document Properties Utility**, you can determine which print preferences/document properties are supported throughout Nuance Output Manager. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured. When properties are disabled, those Document columns are also hidden in the Documents grids.

1. In the **Administration** application, click **Configure Document Properties Utility**.
   This lists all of the document properties available in Nuance Output Manager grouped into the following categories:
   - Basic options
   - Media selection
   - Document
   - Image adjustments
   - Finishing
   - Other properties

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To expand a category and view the associated properties, click the down arrow next to a category name. To collapse a category, click the up arrow

2. Determine the properties you want to be available for configuration throughout Nuance Output Manager.
   - Select the **Allowed** check box for any property you want to be available for configuration throughout Nuance Output Manager.
   - Clear the check box for any property that you do not want to be available.

   Properties that are configured by selecting from a list of options will display a drop-down arrow in the property cell. Click the cell containing the arrow to display a dialog listing the available options. You can select and clear the check boxes to determine the choices that will be available when those properties are configured.

   Note: Here is an example of how to configure the Resolution property so users can only select a Resolution of 75, 100, or 150. First, expand the **Basic options** category by clicking the down arrow next to the category name. Next, select the check box next to the **Resolution** property. This will make the property available for configuration throughout Nuance Output Manager. Finally, under the **Resolution** property, select the check boxes next to the options you want to be available for selection. In this example, you would select the check boxes next to 75, 100, and 150. Clear the check boxes next to the remaining Resolution options.
3. Repeat step *2* on page 230 until all properties are configured.
4. When all of the properties are configured, click **Apply**.

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Output Processes and Actions

Output processes

Output processes define actions that Nuance Output Manager takes on documents while routing the documents to destinations.

You can configure Nuance Output Manager to use an output process to modify documents as they are routed to destinations. An output process is a sequence of actions to take on the document. You can use output processes to add banners, perform transformations or changes to the document record format, and other actions such as search and replace, set finishing options, and insert overlays.

You assign output processes to a destination in the configuration dialog box for a destination. There you also configure a destination output process to override output processes assigned to documents. You can assign output processes to documents in the configuration dialog box for a source, using a business rule, or by assigning an output process profile on the context menu for a document.

Process designer

Use the Output Manager **Process Designer** to create output processes. The **Process Designer** can be opened from the **Tools** menu on the Output Manager Console menu bar or using the **New** or **Edit** buttons for an output process assignment or in the **Manage Output Process Profiles** dialog box.

For details about the **Process Designer** layout, see *Process Designer*.

Output Process Actions

The following folders contain actions that you can use in an output process. *How to Configure Actions* on page 235 provides more information on actions.

Action type	Description
Append	Adds data to the end of the document. The data can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.
Code page	Changes the encoding of a document from one code page to another.
DCO	Allows for record format changes.
Hex Table	Allows single or multiple byte substitutions.
Package Management	Configures actions to define or manipulate package contents.
Post Processing Actions	Configures actions to be performed at the end of the output processing.
Prepend	Adds data to the beginning of the document. The data can be a set of bytes, a string, a text resource, a binary

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Action type	Description
	resource, an Nuance Output Manager job Ticket, or a banner resource.
Print Preferences	Modifies the document properties or other attributes of the document to align with what the target printer needs for the specific document type.
Search/Replace	Enables bytes or strings to be searched and then replaced. The data being replaced can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.
Transform	Modify the document data before the document is routed to the destination. The **EPS**, **EPS Advanced**, and **EPS Adv W/ Banners** actions are used for converting LCDS documents for use with a Xerox EPS controller. The **Advanced Document Modification** action allows repurposing of documents.

Append

Adds data to the end of the document. The data can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.

- **Append banner** — Add a banner resource to the end of a document.
- **Append binary** — Add a binary resource to the end of a document.
- **Append bytes** — Add bytes to the end of a document.
- **Append string** — Add a string to the end of a document.
- **Append text** — Add a text resource to the end of the document.

Code Page

Changes the encoding of a document from one code page to another.

- **Code page translate** — To change the encoding of the document from one code page to another.

DCO

Allows for record format changes.

- **Record Mode Conversion** — To change the record format of the document.

Hex Table

Allows single or multiple byte substitutions.

- **Hex Table** Allows single or multiple byte substitutions.

Package Management

Configures actions to define or manipulate package contents.

- **Merge Package** — To direct how an output process merges a package of documents.

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Post Processing Actions

Configures actions to be performed at the end of the output processing.

- **Call Method** — To select a method from a DLL file to be called after the document has been transferred to its destination. This is limited to calling only public methods or instantiating public objects from the DLL which have no parameters or only basic parameters.
- **Email** — To send an email after the document has been transferred to its destination.
- **Run command** — To configure a script to run after the document has been sent to its destination.

Prepend

Adds data to the beginning of the document. The data can be a set of bytes, a string, a text resource, a binary resource, an Nuance Output Manager job Ticket, or a banner resource.

- **Prepend banner** — Add a banner resource to the beginning of a document.
- **Prepend binary** — Add a binary resource to the beginning of the document.
- **Prepend bytes** — Add a byte resource to the beginning of the document.
- **Prepend OM Ticket** — Add an Nuance Output Manager ticket to the beginning of the document.
- **Prepend string** — Add a text string to the beginning of the document.
- **Prepend text** — Add a text resource to the beginning of the document.

Print Preferences

Modifies the document properties or other attributes of the document to align with what the target printer needs for the specific document type.

- **Apply print preferences** — Modifies the document properties or other attributes of the document to align with what the target printer needs for the specific document type.
- **Set Document Properties** — Set specific values in selected document properties.

Search/Replace

Enables bytes or strings to be searched and then replaced. The data being replaced can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.

- **S/R binary** — Search for and replace binary resources.
- **S/R bytes** — Search for and replace bytes.
- **S/R bytes to banner** — Search for bytes and replace with a banner resource.
- **S/R bytes to binary** — Search for a byte and replace with a binary resource.
- **S/R bytes to string** — Search for a byte and replace with a text string.
- **S/R bytes to text** — Search for a byte and replace with a text resource.
- **S/R string to banner** — Search for a text string and replace with a banner resource.
- **S/R string to binary** — Search for a text string and replace with a binary resource.
- **S/R string to text** — Search for a text string and replace with a text resource.
- **S/R strings** — Search for and replace text strings.

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Transform

Modify the document data before the document is routed to the destination. The **EPS**, **EPS Advanced**, and **EPS Adv W/ Banners** actions are used for converting LCDS documents for use with a Xerox EPS controller. The **Advanced Document Modification** action allows repurposing of documents.

- **Adept Transform** — Convert Xrx or Afp type documents to PCL5, PDF, or PS.
- **Advanced Document Modification** — Use the Advanced Document Modification (ADM) action to run the ADM process.

  ADM is a process where each page of the document is read, portions of the document can be changed, or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, bar codes added, OMR marks added, and logos changed using ADM.
- **EPS** — Convert LCDS documents for use with a Xerox EPS controller.
- **EPS Adv W/Banners** — Convert LCDS documents for use with a Xerox EPS controller and to add banners or trailers to the output.
- **EPS Advanced** — Convert LCDS documents for use with a Xerox EPS controller.
- **Make Copies of Document** — Direct the output process to write the data stream multiple times while sending to the destination.
- **Page Range Via Transform** — Use a transform to print a specific page range.
- **Transform** — Transform the format of the document to a new format or to another data type.
- **Transform Office Files** — Transform Microsoft Office documents to PDF documents.
- **Transform W/Banners** — Transform the format of the document to a new format or to another data type.
- **Zip Document** — Create a zip file from the document to be sent to the destination.

How to Open and Close the Process Designer

Use the methods in this procedure to open and close the **Process Designer**.

- *Open the Process Designer*
- *Close the Process Designer*

To open the Process Designer

You can display the **Process Designer** using one of the following methods:

- On the Output Manager Console menu bar, click **Tools** > **Process Designer** .
- Create a business rule action to set output processes.
- Click **New** or **Edit** in the **Manage Output Process Profiles** dialog box.

  You can access the **Manage Output Process Profiles** dialog box from the **More settings** tab during destination configuration, the **Output settings tab** during source configuration, or when configuring a business rule to set output processes.

To close the Process Designer

- On the menu bar, click **File** > **Exit**.

How to Create an Output Process

Complete this procedure to create an output process.

1. Open the Process Designer.

   For more information, see *Open and Close the Process Designer*
2. In the **Actions** pane, select an action to use in your output process.

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3. Drag the action to the line linking two actions in the **Process** panel.

   Because the placement and order of actions is important, the **Process Editor** enforces where actions can be dropped in landing zones. For more information about zone order and exceptions to the order, see *Landing zones*.

   Tip: You can remove actions from an output process by selecting the action in the **Process** panel and pressing the Delete key. When an action is selected, a green box will display around the action.
4. In the **Action Configuration** panel, configure the action selected in the **Process Editor**.
5. Repeat steps *2* on page 234 through *4* on page 235 to add all the actions that are required in an output process.
6. When complete, in the menu bar, click **File** > **Save**.
7. Enter a **Process Name** and **Description**.
8. Click **Save**.
9. To open an output process, select **File** > **Open** from the Process Designer.

How to Configure Actions

You configure output process actions in the Process Designer **Action Configuration** pane. The panel is divided into the following sections:

- **Action Parameters** — These parameters are specific to the action that you are configuring. The procedures in this topic contain more information on action parameters.
- **If Action Encounters Error** — This parameter is common to all actions. The **Workflow error** setting specifies how the process responds to a workflow error. Select **Stop** to stop the process and send an error to the destination. Select **Skip** to skip the action and continue processing the next action.
- **Action Executes For The Following** — This parameter is common to all actions. The parameter determines if the action is executed or not according to:
  - **Printer families** — Use the check boxes to determine if the selected action is executed for all printer families or only for certain printer families. This allows you to set up processes that include actions that only apply to some destinations.
  - **Document data types** — Use the check boxes to determine if the selected action is executed for all data types or only for certain data types. This allows you to set up processes that include actions that only apply to some documents.
  - **Job Level** — This parameter specifies how the action is applied to multi-document packages. Select **Document** to perform the action on all documents in the package. Select **Package** to perform the action on only the first or last documents of the package.

  Job level is only applicable to certain actions. It is useful for example to apply banners and trailers to only the first and last document of a multi-document package, or to execute an append or prepend action only if it is the first or last document of a package (or alternately every document in the package). The following actions include this parameter:

  - All Prepend actions except Prepend OM Ticket
  - All Append actions
  - EPS Adv W/Banners
  - Transform W/Banners

Parameter editor notes:

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- Resource selection — When the parameter being configured is the specification of a resource, you can use a document property (which is expected to hold a resource name) to specify the resource. Select the existing text in the cell, right-click, and select the document property from the context menu.
- String entries — When the parameter being configured is a string (which defaults to "Enter String"), you can use a document property (which is expected to hold the desired string) or a function to derive the desired string. Select the existing text in the cell, right-click, and select the desired document property or function from the context menu. See *Using Output Manager functions* for more information on functions.

The steps necessary to configure actions vary depending on the action type. Perform the steps in the appropriate section to configure output process actions.

- *Append or prepend banner*
- *Append or prepend binary*
- *Append or prepend bytes*
- *Append or prepend string*
- *Append or prepend text*
- Prepend OM Ticket — There are no action-specific parameters to configure for this action.
- *Code Page - Code page translate*
- *DCO – Record Mode Conversion*
- *Hex Table*
- *Package Management - Merge Package*
- *Post Processing Actions – Call Method*
- *Post Processing Actions – Run command*
- *Post Processing Actions – Email*
- *Print Preferences*
- *Search/replace Actions*
- *Transform Actions*

Append or prepend banner

Use the append banner action to add a banner resource to the end of a document. Use the prepend banner action to add a banner resource before the document.

1. Drag the **Append banner** or **Prepend banner** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - Banner — Select an existing banner resource or click the browse button (...) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.

     See the *Configuring a banner resource* topic for instructions on creating a banner resource from the **Banner Resource** dialog box.
   - Code page in — Select the input code page.
   - Code page out — Select the output code page.

Append or prepend binary

Use the append binary action to add a binary resource to the end of a document. Use the prepend binary action to add a binary resource before the document.

1. Drag the **Append binary** or **Prepend binary** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameter:

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- Binary — Select an existing binary resource or click the browse button (...) to create or manage binary resources. You can also use a document property as described in the *parameter editor note on resource selection*.

See the *Configuring a binary resource* topic for instructions on creating a binary resource from the **Binary Resource** dialog box.

Append or prepend bytes

Use the append bytes action to add bytes to the end of a document. Use the prepend bytes action to add bytes before the document.

1. Drag the **Append bytes** or **Prepend bytes** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the Bytes browse button (**...**).
3. In the **Hex entry** dialog box, enter the necessary value in hexadecimal format.

Append or prepend string

Use the append string action to add a string to the end of a document. Use the prepend string action to add a string before the document.

1. Drag the **Append string** or **Prepend string** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - Append string or String — Enter the string that you want to add to the end of the document or the string that you want to add before the document. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - Code page out — Select the output code page.

Append or prepend text

Use the append text action to add a text resource to the end of a document. Use the prepend text action to add a text resource before the document.

1. Drag the **Append text** or **Prepend text** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - Text — Select an existing text resource or click the browse button (...) to create or manage text resources. You can also use a document property as described in the *parameter editor note on resource selection*.

     See the *Configuring a text resource* topic for instructions on creating a text resource from the **Text Resource** dialog box.
   - Code page in — Select the input code page.
   - Code page out — Select the output code page.

Code Page – Code page translate

Use the code page translate action to change the encoding of a document from one code page to another code page.

1. Drag the **Code page translate** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - Code page in — Select the code page that represents how the input document is encoded.
   - Code page out — Select the code page that represents how the output document is encoded.

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DCO – Record Mode Conversion

Use the Record Mode Conversion action to change the record format of a document.

1. Drag the **Record Mode Conversion** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the Record Mode Conversion action parameter browse button (…).
3. In the **Transform Record Mode (Advanced)** dialog box, configure the transform parameters as described in *Transform Record Mode (Advanced) dialog box* on page 687.

Hex Table

Use the Hex Table action to allow single or multiple byte substitutions.

1. Drag the HexTable action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the HexTable action parameter browse button (**...**).
3. In the **Hex Table** dialog box, select the bytes in the grid to be substituted and enter the substitute bytes in the Hex Value column.

Package Management - Merge Package

Use the Package Management - Merge Package action to direct how an output process merges a package of documents.

1. Drag the **Merge Package** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Configure** action parameter browse button (**...**).
3. In the **Merge Package** dialog box, configure merge settings:
   a) Next to **Transform**, click **Configure**. In the **Configure Transform** dialog box, specify the merged document output type and specify how to transform available input document types.
   b) If necessary, select **Package boundaries** and click **Configure** to open the **Package Boundary Fields** dialog box to specify which document properties define where to split packages.

      In the grid, expand the sections to select the document properties to be used as package boundaries.

      Note: Boundary fields are only applicable when a merged document exceeds the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count are split into separate documents. Boundary fields are used to control where the merged documents are split. Each split is on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and occurs where the maximum number of pages can be fit.
   c) If package boundaries are enabled, select the **On demand boundary field resolver rule** if necessary.

      Note: The **On demand boundary field resolver rule** is an advanced option. The control is a combo box that is populated with Ad Hoc Business Rules that have been configured in Output Manager. The selected ad hoc rule is configured to populate the chosen boundary fields that would otherwise not be populated with meaningful data. The resolver rule is used at the time the merge operation is at a split (when the exception threshold is reached) and provides useful data in the boundary fields so the split can be calculated.
   d) In the **Merged Document Properties** group, select which document whose properties are inherited by the merged document.

      Selecting custom properties is not yet available.
   e) If necessary, select **Exception fields** and click **Configure** to open the **Exception Fields** dialog box to specify document properties that are exceptions.

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In the **Exception Fields** dialog box, expand the sections to select the document properties that are exception fields. Exceptions are another means of directing package splits based on an accumulation of specified property values encountered.

f) Select the **Add blank pages for duplexing** check box to assure front page alignment for duplex printing.

This causes documents to start on an odd page number.

g) If necessary, select **Write a manifest file**.

Post Processing Actions – Call Method

Use the Call Method action to select a method from a .dll file to be called after the document has been transferred to its destination. This is limited to calling only public methods or instantiating public objects from the .dll file which have only basic parameter types.

1. Drag the **Call Method** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Call method** action parameter browse button (**...**).
3. In the **Configure Method Call** dialog box, configure method call settings:
   a) Click **Choose assembly**.
   b) Navigate to the .dll file that contains the public method (or object to instantiate that has the method).
   c) In the **Type** list, select the object type on which to make the call.
   d) In the **Constructor** list, select the constructor method you want to use to instantiate the object.

   The constructor must have either no parameters or only parameters of basic types (string, boolean, and numeric – Int16, Int32, or Int64).

   e) If the selected constructor has parameters to be defined, specify them in the Constructor Parameters grid.

   You can also right-click to select document properties or functions in the parameter values.

   f) In the **Method** list, select the method to be called.

   The method must have either no parameters or only parameters of basic types (string, boolean, and numeric – Int16, Int32, or Int64).

   g) If the selected method has parameters to be defined, specify them in the Method Parameters grid.

   You can also right-click to select document properties or functions in the parameter values.

Post Processing Actions - Run command

Use the Run Command action to configure a script to run after the document has been transferred to its destination.

1. Drag the **Run command** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Command** action parameter browse button (...). to open the **Run Command** dialog box.
3. In the **Run Command** dialog box, enter the command line text.

   To insert document properties in the command line, right-click in the text box and click **Properties**. Some example document properties are date/time, document name, and data type.

Post Processing Actions - Email

Use the email action to send an email after the document has been transferred to its destination.

1. Drag the **Email** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Email** action parameter browse button (**...**), and configure the email options
3. In the **Send Email** dialog box, configure email settings:
   a) In the **Profile** list, click the appropriate email profile.

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You can also click the **Browse** button to display the **Manage Outbound Email Profiles** dialog box. This dialog box lists all of the defined email profiles. From this dialog box you can create, import, and export profiles, as well as manage existing profiles. To create a new email profile, click **New** and configure the email profile from the **Outbound Email Profile** dialog box.

b) Select the **Priority** level of the email message.

You can select an importance level of normal, low, or high.

c) Enter the email addresses you want to be sent notifications in the **To**, **CC**, and **Bcc** boxes.

You can enter multiple email addresses separated by a comma or semicolon.

d) In the **Reply to** box, enter an email address where replies are routed.

You can enter multiple email addresses separated by a comma or semicolon.

e) Enter the email **Subject** text.

f) Under **Digest**, determine if you want to send the notification messages for multiple events concatenated into one email. To enable the digest feature, in the **Send Digest** list, choose from the following options:

- **Every interval** — Sends the digest according to the time interval specified. You receive a message every interval, even if no alerts were received during the interval.
- **At time interval** — Sends the digest according to the time interval specified. The time interval will start when the first notification message is received. You are notified when at least one notification has been received.
- **Every hour** — Sends the digest every hour. You receive a message every interval, even if no alerts were received during the interval.
- **Every half hour** — Sends the digest every half hour. You receive a message every interval, even if no alerts were received during the interval.

If necessary, specify the **Interval** in minutes. In the **Max Alerts** box, you can specify the maximum number of alerts to be included in the digest.

g) Enter the body text.

To insert document properties in the body text, right-click in the text box, select **Insert Document Property**, and choose the appropriate properties. The values of the properties will display in the email message.

h) Click **Validate** to validate the body text.

i) Click **OK**.

Print Preferences

Use Print Preference actions to modify the document properties or other attributes of the document.

- *Apply print preferences*
- *Set Document Properties*

Apply print preferences

Use the Apply print preference action to modify the document properties or other attributes of the document to align with what the target printer needs for the specific document type.

1. Drag the **Apply print preferences** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:

- **Use Existing Ticket** — Select **Yes** or **No** to specify if you want to use the existing job ticket.
- **Allow Unresolved Print Preferences** — Select **Yes** or **No**.

Unresolved print preferences are ones which have been configured for the document, but the target printer family does not support the preference or the configured value is not supported. For example, the document

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property Output Bin is configured for Tray 5, and the target printer family does not support Tray 5. Output Bin is an unresolved print preference.

Warning: If you set this option to No, and one or more unresolved print preference exists with the target printer family, the document does not print.

- **Convert PDF to PCL** — Select Auto, Yes, or No.
- **Convert PDF to PS** — Select Auto, Yes, or No.

The following rules apply to the Convert PDF options:

- No conversion happens if the data type is not PDF when this action is executed.
- These options are only enabled if the system is properly licensed and applicable conversion software is installed and available.
- The Auto option only converts if the printer and printer family do not support PDF.
- If both **Convert PDF to PCL** and **Convert PDF to PS** are set to Yes or Auto, and the criteria is met for both to convert, the resulting data type is PCL.

Set Document Properties

Use the Set Document Properties action to modify select properties of the document before it is sent to the printer.

1. Drag the **Set Document Properties** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Document properties** browse button (**...**).

   In the **Document Properties** dialog box, the grid lists the property values that you can configure. The values are grouped in the following categories:

   - Basic options
   - Media selection
   - Document
   - Image adjustments
   - Finishing
   - Other properties
3. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:

Option	Description
Always Apply	Always applies the specified property value. Nuance Output Manager adds commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager modifies the commands to work with the printer family where the document is sent.
Apply Conditionally	Applies the property value conditionally. Nuance Output Manager only adds or modifies commands for the print preference when the printer family for the document destination is different from the printer family the document was originally designed for.
Informational Only	Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

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4. In the **Value** column, specify the document property value. You can use functions to insert and extract data as necessary.

Search/Replace Actions

Use the search/replace action to allow bytes and strings to be searched and then replaced. The replacement item can be a set of bytes, a string, a text resource, a binary resource, or a banner.

- *Search/Replace binary*
- *Search/Replace bytes*
- *Search/Replace bytes to banner*
- *Search/Replace bytes to binary*
- *Search/Replace bytes to string*
- *Search/Replace bytes to text*
- *Search/Replace string to banner*
- *Search/Replace string to binary*
- *Search/Replace string to text*
- *Search/Replace strings*

Search/Replace binary

Use the S/R binary action to search for and replace binary resources.

1. Drag the **S/R binary** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search binary** — Select an existing binary resource you want to search for or click the browse button (**...**) to create or manage binary resources. You can also use a document property as described in the *parameter editor note on resource selection*.

     See the *Configuring a binary resource* topic for instructions on creating a binary resource from the **Binary Resource** dialog box.
   - **Replace binary** — Select an existing binary resource to use for replacement or click the browse button (**...**) to create or manage binary resources. You can also use a document property as described in the *parameter editor note on resource selection*.

Search/Replace bytes

Use the S/R bytes action to search for and replace bytes.

1. Drag the **S/R bytes** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search** — Click the browse button (**...**) and specify the hex value to search for.
   - **Replace** — Click the browse button (**...**) and specify the hex value to use as the replacement.

Search/Replace bytes to banner

Use the S/R bytes to banner action to search for bytes and replace with a banner.

1. Drag the **S/R bytes to banner** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search** — Click the browse button (**...**) and specify the hex value to search for.
   - **Replace Banner** — Select an existing banner resource to use for replacement or click the browse button (**...**) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.

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- **Replace code page in** — Select an input code page to replace the current input code page.
- **Replace code page out** — Select an output code page to replace the current output code page.

Search/Replace bytes to binary

Use the S/R bytes to binary action to search for bytes and replace with a binary resource.

1. Drag the **S/R bytes to file** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search** — Click the browse button (**...**) and specify the hex value to search for.
   - **Replace binary** — Select an existing binary resource to use for replacement or click the browse button (**...**) to create or manage binary resources. You can also use a document property as described in the *parameter editor note on resource selection*.

Search/Replace bytes to string

Use the S/R bytes to string action to search for bytes and replace with a string.

1. Drag the **S/R bytes to string** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search** — Click the browse button (**...**) and specify the hex value to search for.
   - **Replace String** — Enter the replacement string. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Replace code page out** — Select an output code page to replace the current output code page.

Search/Replace bytes to text

Use the S/R bytes to text action to search for bytes and replace with a text resource.

1. Drag the **S/R bytes to text** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search** — Click the browse button (**...**) and specify the hex value to search for.
   - **Replace Text** — Select an existing text resource to use for replacement or click the browse button (**...**) to create or manage text resources. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Replace code page in** — Select an input code page to replace the current input code page.
   - **Replace code page out** — Select an output code page to replace the current output code page.

Search/Replace string to banner

Use the S/R string to banner action to search for a string of data and replace it with a banner resource.

1. Drag the **S/R string to banner** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search string** — Enter the string that you want to search for. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Search code page out** — Select the output code page to use in the search.
   - **Replace Banner** — Select an existing banner resource to use for replacement or click the browse button (**...**) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.
   - **Replace code page in** — Select an input code page to replace the current input code page.
   - **Replace code page out** — Select an output code page to replace the current output code page.

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Search/Replace string to binary

Use the S/R string to binary action to search for a string of data and replace it with a binary resource.

1. Drag the **S/R string to binary** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search string** — Enter the string that you want to search for. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Search code page out** — Select the output code page to use in the search.
   - **Replace binary** — Select an existing binary resource to use for replacement or click the browse button (**...**) to create or manage binary resources. You can also use a document property as described in the *parameter editor note on resource selection*.

Search/Replace string to text

Use the S/R string to text action to search for a string and replace it with a text resource.

1. Drag the **S/R string to text** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search string** — Enter the string that you want to search for. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Search code page out** — Select the output code page to use in the search.
   - **Replace text** — Select an existing text resource to use for replacement or click the browse button (**...**) to create or manage text resources. You can also use a document property as described in the *parameter editor note on resource selection*.
   - **Replace code page in** — Select an input code page to replace the current input code page.
   - **Replace code page out** — Select an output code page to replace the current output code page.

Search/Replace strings

Use the S/R strings action to search for and replace strings of data.

1. Drag the **S/R strings** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Search string** — Enter the string that you want to search for. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Replace string** — Enter the string you want to use for replacement. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Search code page out** — Select the output code page to use in the search.
   - **Replace code page out** — Select an output code page to use for the replacement.

Transform Actions

Use the transform actions to modify document data before the document is transferred to the destination. For example, the EPS, EPS Advanced, and EPS Adv W/Banners actions are used for converting LCDS documents for use with a Xerox EPS controller. The Advanced Document Modification action allows for the repurposing of the documents.

- *Adept Transform*
- *Advanced Document Modification*
- *EPS*
- *EPS Adv W/ Banners*
- *EPS Advanced*

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- *Make copies of document*
- *Page Range Via Transform*
- *Transform*
- Transform Office Files
- *Transform W/ Banners*
- *User Information Stamping*
- *Watermarking*
- *Zip Document*

Adept Transform

Use the Adept Transform action to convert Xrx or Afp type documents to PCL5, PDF, or PS type.

1. Drag the **Adept Transform** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Transform** action parameter browse button (**...**).
3. In the **Transform Adept** dialog box, perform the following steps:
   a) Set the **Xrx** and/or **Afp** check boxes to specify what types of document will be converted.
   b) In the **to** list, select the target document type.
   c) In the **Ini** list, select an existing Ini resource to use for initializing the transform or click the browse button (…) to create or manage the Ini resources. You can also use a document property as described in the *parameter editor note on resource selection*.
   d) Use the **Ini description** drop-down list box to add a description for the transform action.
   e) In the **Ini default** list, select an existing Ini resource to use as a default initialization if there is not an available Ini resource that matches the evaluated document property or function specified previously.

      Otherwise, click the browse button (**...**) to create or manage the Ini resources.
   f) Fill in the **EXE path** or click the browse button (**...**) to browse for the executable (.exe) file that performs the transform.

Advanced Document Modification

Use the Advanced Document Modification (ADM) action to run the ADM process.

ADM is a process where each page of the document is read, portions of the document can be changed, or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, bar codes added, OMR marks added, and logos changed using ADM.

1. Drag the **Advanced Document Modification** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Advanced Document Modification** browse button (**...**).
3. In the **Server** list on the **Configuration** tab of the **Modify Document** dialog box, click the licensed transform server that you would like to use.
4. In the **Transform package** list, you can select an existing transform package or *create one* for ADM.
5. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
6. Use the **Override input filter profile assigned to document** check box to determine whether to override the input filter profile assigned to the document or to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.
7. In the **Unit library** list, you can select an existing unit library or create one. Complete the following steps to create a unit library:
   a) Enter the unit library **Name**, **Description**, and any **Comments**.
   b) In the **Document Properties Needed** list, select the document properties needed by the unit library.

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These properties are written to a file called `filename.properties` when Nuance Output Manager calls the document modification software. This file can be opened and read in by the unit library.

c) In the **Filters Needed** list, select the filters needed for the unit library.

These filters are written to a temporary location which will be sent to the document modification software.

d) Under **Unit**, specify the unit library.

Enter the unit library code within the `<script> </script>` tags in the appropriate event handler sections.

> **Tip:** Review the default comments of a new unit library for descriptions of the parameters sent from Nuance Output Manager to the unit library and information about how to tell Nuance Output Manager about the documents modified or created by the unit library.

e) If necessary, click **Reload Variables from Unit** to populate the **Output variables** grid with any output variables defined in the unit library.

Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, and page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations. For more information on configuring unit libraries, contact Nuance Communications Professional Services.

8. For **Output format**, select the target output format for the document.

EPS

Use the EPS action to convert LCDS documents for use with an Xerox EPS controller.

1. Drag the **EPS** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the **Queue name** by entering the queue name on the EPS device.

   You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.

EPS Adv W/ Banners

Use the EPS Adv W/ Banners action to convert LCDS documents for use with a Xerox EPS controller and to add banners or trailers to the output.

- To configure this action, refer to the EPS advanced action below. All configuration parameters for this action are identical to the EPS Advanced settings with the exception of the following additional parameters:

  a) **Banner** — Select an existing banner resource to use for the banner to appear before the document or click on the browse button (**...**) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.

  b) **Trailer** — Select an existing banner resource to use for the trailer to appear after the document or click on the browse button (**...**) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.

EPS Advanced

Use the EPS Advanced action to convert LCDS documents for use with a Xerox EPS controller.

1. Drag the **EPS Advanced** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:

   - **Job name** — Enter the name of the job going to the EPS device. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
   - **Host name** — Enter the host name sending the job to the EPS device. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.

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- **User name** — Enter the name of the user submitting the job. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
- **Queue name** — Enter the queue name on the EPS device. You can also use a document property or function as described in the *parameter editor notes on resource selection and string entries*.
- **Code page in** — Select the code page that represents how the input document is encoded.
- **FCB** — Select the FCB resource that controls the vertical format of printed output or click on the browse button (…) to create or manage FCB resources. You can also use a document property as described in the *parameter editor note on resource selection*.
- **FCB Override** — Enable or disable overriding FCBs.

  Selecting Yes causes FCBs in the beginning of the data to be ignored, functioning as if there were no FCBs in the data.
- **Send FCB** — Enable or disable sending FCBs to the printer.
- **Delimiter** — Select None, ASCII, or EBCDIC to be added to each record.
- **Length** — Specify the record length.
- **Pad Record** — Enable or disable pad record.
- **Pad Skip to channel one** — Enable or disable pad skip to channel 1.

  Selecting **Yes** pads blank skip to channel 1 records with a space. Selecting **Consecutive** pads any blank skip to channel 1 record following a blank skip to channel 1 record. The first skip to channel 1 remains blank or unpadded.
- **Truncate Trailing Blanks** — Enable or disable the truncating of trailing blanks.

Make Copies of Document

Use the Make Copies of Document action to direct the output process to write the data stream multiple times while sending to the destination.

Note: Only the data contents are written multiple times, not the header nor any other information.

1. Drag the **Make Copies of Document** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the **Copy count** with one of the following settings:
   - Leave the default **[Copies_Copies]** value to let the copy count document property control the copy count.
   - Enter a numeric value to override the document property.

Page Range Via Transform

Use the Page Range Via Transform action to print a specific page range. This action may require third-party transform package software and a license.

1. Drag the **Page Range Via Transform** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Configure** ellipse button (…).
3. In the **Page Range Via Transform** dialog box, enter additional global, input, or output commands to be used in transform package command string.

Transform

Use the Transform action to transform the format of a printer-ready document to a new format or to another data type.

1. Drag the **Transform** action to the line that connects **Start** and **End** in the **Process** pane.
2. Click the **Transform** browse button (**...**) to open the **Configure Transform** dialog box.
3. In the **Server** list, click the licensed transform server that you want to use.
4. In the **Transform package** list, you can select an existing transform package or *create one*.

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5. Use the **Override input filter profile assigned to document** check box option to determine whether to override the input filter profile assigned to the document or to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.
6. In the **Output format** list, click the format of the output file.
7. Configure the conversion of each input format in the **Input formats** grid.
   - For all unlicensed input formats and any input formats you do not want to use, leave the **Configuration** column with the default setting of **Do Not Transform**.
   - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the browse button (**...**) in the **Modify/ New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration is created. If a predefined configuration is selected, that configuration is modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab.

Transform Office Files

Use the Transform Office Files action to convert Microsoft Office files to PDF documents.

1. Drag the **Transform Office Files** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the following action parameters:
   - **Office file formats** — Click the ellipsis button (…) to select which office formats to convert with this action. By default, all formats are selected.
   - **Use Microsoft API if available** — By default, Nuance Output Manager uses a collection of third-party components to perform the conversions. In earlier versions of the Word component, certain complex .rtf files were not accurately converted to PDF. An alternate method of converting Microsoft Word files was added using the Microsoft API (if Microsoft Word 2013 is installed on the server). The causes of the inaccuracies have been corrected in later versions of those third-party components.

Transform W/ Banners

Use the Transform W/Banners action to transform the format of a printer-ready document to a new format or to another data type and also use banners and trailers.

To configure the Transform W/ Banners action, refer to the Transform action configuration above. All action configuration parameters for this action are identical to the Transform parameters with the following added parameters:

1. Drag the **Transform W/Banners** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, configure the **Transform** action parameter as described in *Transform* on page 247 above.
3. For the **Banner** parameter, select an existing banner resource to use for the banner to appear before the document or click on the browse button (...) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.
4. For the **Trailer** parameter, select an existing banner resource to use for the trailer to appear after the document or click on the browse button (**...**) to create or manage banner resources. You can also use a document property as described in the *parameter editor note on resource selection*.
5. For the **Orientation** parameter, select **Portrait** or **Landscape**.
6. For the **Text Profile** parameter, select an existing text resource to use while creating the banner and trailer text files or click on the browse button (…) to create or manage text resources. You can also use a document property as described in the *parameter editor note on resource selection*.

   This text profile needs to be specifically tailored to one of two different media sizes (Letter or A4). To create the text profile complete the following steps:

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a) Click on the browse button (**...**) to open the **Manage Resources** dialog box.
b) In the grid, select the **Default – TXT** profile and click **Edit**.
c) Right-click in the **Filter Profile** edit area, click **Select All**, then copy the selection.
d) Close the **Configure Filter Profile** dialog box.
e) In the **Manage Resources** dialog box, click **New**.
f) Right-click in the **Filter Profile** edit area and click **Paste**.
g) In the **Datatype** list, select **TXT**.
h) Enter an appropriate **Name** (for example Letter size Banner, or A4 size Banner) and **Description** for the profile.
i) Under **Filter Profile**, modify the text as follows:

- Paste the following text inside the `<fontlist></fontlist>` tags:

  For letter size:

```
<font family="courier new" serifstyle="serif" spacing="monospaced">
     <face weight="medium" width="normal" style="upright" devname="co
urier" fontfile="cour" fontfiletype="truetype" size="8" id="1" pitch=
"17500" />
</font>
```

  For A4 size:

  Replace `17500` with `18000` in the preceding text.

- Find any `<pagedefinition></pagedefinition>` tags and replace all with the following single one:

  For Letter size:

```
<pagedefinition name="Letter"><papersize format="Letter" orientation=
"portrait" />
     <margins left="1 cm" right="1 cm" top="1 cm" bottom="1 cm" />
     <linesperinch value="7" /><linesperpage value="0" />
</pagedefinition>
```

  For A4 size:

  Replace all instances of "`Letter`" with "`A4`"

- At the bottom, remove the comment marks (`<!--` and `-->`) from the line that contains (`path="c:\WINDOWS\Fonts"`) as shown below:

```
<resourcelist>
     ...
<files path="c:\WINDOWS\Fonts" type="TrueType" extension="ttf"/> <!--
 <files path="c:\WINNT\Fonts" type="TrueType" extension="ttf"/> --> <
!-- <files path="c:\fonts" type="TrueType" extension="ttf"/> -->
</resourcelist>
```


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Tip: You can use Ctrl+F functionality within the editor to find content.

User Information Stamping

Use the User Information Stamping action to to add user information and a date to documents.

1. Drag the **User Information Stamping** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **User Information Stamping** action parameter browse button (**...**).
3. In the **Server** list, click the licensed transform server that you want to use.
4. In the **Transform package** list, you can select an existing transform package or *create one*.
5. In the **Additional Parameters** field, specify additional parameters needed for the transform.
6. In the **Text to stamp** field, do one of the following:
   - Type the text to appear on the document.
   - Right-click in the field and select **Insert Other Property** > **Other Properties**. Select a property from the document.

   You can use PCL, PDF, PS, and Plain Text files. Documents in other formats must be transformed into one of the supported formats before this feature will work properly.
7. Configure the format and location of the text.
8. Click **OK**.

Watermarking

Use the watermarking action to add a watermark to indicate the status or security level of a document.

1. Drag the **Watermarking** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Watermarking** action parameter browse button (**...**).
3. In the **Server** list, click the licensed transform server that you want to use.
4. In the **Transform package** list, you can select an existing transform package or *create one*.
5. You can use an existing watermark or create a new one. Do one of the following:
   - In the **Watermark/Stamp** list, select one of the existing watermarks: **Confidential**, **Do Not Copy**, **Draft**, or **Internal**.
   - Click **New**. In the **Create Resource** dialog box, complete the fields for the new watermark. In the **Import Resource Data** section, click **Browse** and select the file you want to use as a watermark.

   You can use PCL, PDF, and PS files. Documents in other formats must be transformed into one of the supported formats before this feature will work properly.
6. Click **OK**.

Zip Document

Use the Zip Document action to create a zip file from the document being sent to the destination.

1. Drag the **Zip Document** action to the line that connects **Start** and **End** in the **Process** pane.
2. In the **Action Configuration** pane, click the **Configure** ellipsis button (…).
3. In the **Zip Document dialog box** dialog box, enter the desired **Compression level** and an optional password to access the resulting zip file.

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To create a transform package

Use these steps to create a new transform package, when applicable to new transform actions, instead of using an existing one.

1. In the **Transform Package** section, click **New**.
2. Enter the transform package **Name**.
3. Select the transform package type.
4. If you selected a third-party transform package, verify the **EXE path** is set to the correct folder.

   The default EXE path is @EOMTransformDir. To change the path, type in the box or click the browse button (**...**).
5. Set the **Logging State**.

   The logging state determines if transform logs and temp files are saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to verify that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files are not deleted and are available for troubleshooting.
6. On the **Filter Profiles** tab, specify how the transform software handles the formatting for each data type.
7. To configure a profile, click the browse button (**...**) in the **Modify/New** column for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile.

   The profile affects fonts, resources, and other document transform and formatting attributes. For the IPDS data type, the profile also contains a communications and printer definition section.
8. To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
9. On the **Resources** tab, specify where the transform software finds the resources needed for the transformation. For example, PDF fonts are usually found at the location of an Adobe installation.
10. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts.

    The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.

How to Open an Output Process

Complete this procedure to open an output process.

1. Open the **Process Designer**.
2. In the menu bar, click **File** > **Open**.
   This opens the **Open Process** dialog box.
3. Select the process you want to open and click **OK**.

How to Rename an Output Process

Complete this procedure to rename an output process.

1. Open the **Process Designer**.
2. On the menu bar, click **File** > **Rename Process**.
   This opens the **Rename Process** dialog box.
3. Select the process you want to rename.
4. In the **Name** box, enter the new name.

   You can also change the **Description**.
5. Click **OK**.

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How to Delete an Output Process

Complete this procedure to delete an output process.

1. Open the **Process Designer**.
2. On the menu bar, click **File** > **Delete**.
   This opens the **Delete Process** dialog box.
3. Select the process you want to delete.
4. Click **OK**.

How to Print an Output Process

Complete this procedure to print an output process.

Tip: Before you print the output process, you can click the **File** > **Print Preview** on the menu bar to view how the process will print.

1. Open the **Process Designer**.
2. In the menu bar, click **File** > **Print**.
   This opens the **Print** dialog box.
3. In the **Name** list, select the printer you want to print the document.
4. If necessary, under **Print range**, select the pages you would like to print.
5. Click **OK**.

How to Search for an Output Process

You can search for output processes from the **Process Designer**.

1. Open the **Process Designer**.
2. In the search box below the **Actions** tree, type the text you want to find and press Enter, or click the Search image. Nuance Output Manager will start at the top of the tree and search for the text. Each time the text is found the selected item will be highlighted in the tree.
3. If more than one search result is found, click the next and previous arrow buttons that appear in the search panel.

How to Zoom In or Out of the Process Editor

You can set the magnification level when working with Process Editor. The zoom feature enlarges or reduces the display of your output process as a percentage of its actual size.

1. Open the **Process Designer**.
2. Open a new or existing output process.
3. On the menu bar, click **View Zoom Canvas**.
   This opens **Process Designer Zoom** dialog box.
4. Click the arrow to adjust the magnification level.

   You can click **Reset** to view the output process in its actual size.
5. Click **Close**.

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Cost Tracking and Management

Print rules profiles

Rules based printing enforces printing restrictions.

Print rules run after the document has been received by Output Manager, but before business rules are processed. Restrictions are applied using Print Rule Profiles that are associated with Windows Queue Sources or Users and Departments.

There are basic and advanced modes for printing:

Basic	This mode allows restriction of printing based on page counts, color, and so forth. The desktop client can be configured to inform the user of restrictions. The basic mode also allows some control of picking Billing Accounts.
Advanced	This mode allows finer control over conditions, and actions. Allows custom messages, re-routing of jobs to different destinations, and the setting (and/or enforcement) of document properties.

Each user is a member of a single department. Either Active Directory or the manual assignment of Groups to Departments should be used to determine each user's department.

Print rules profiles are defined for users in the **Print Rules Profile** column on the **General** tab in **Administration** > **Manage Users**. Click the drop-down list button to select an existing profile or the browse button (**...**) to create or edit print rule profiles.

How to Create a Print Rules Profile

To create a print profile, complete these steps.

1. From the grid, click the appropriate **Print Rules Profile** cell and then click the **Browse** button.
   This opens the **Manage User Print Rules Profiles** dialog box.
2. Click **New**.
   This opens the **User Print Rules Profiles** dialog box.
3. Enter a **Profile name** and **Profile description**.
4. To control the documents that are printed, select options under **Restrictions - Disable Printing**.

   You can choose to always disallow printing, limit the maximum document page count or byte count to a specified value, and prohibit the printing of color in a document. You can also choose to disregard any restrictions set for Windows queues.
5. To define notification options, select one of the check boxes under **Restriction Notification Options**.

   You can notify the user by email or with a pop-up window.

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6. To specify that the client pop-up window be displayed for the user, select **Show client pop-up for this user**. This displays configuration options for the pop-up window.
   a) Under **Client pop-up general options**, select the appropriate check box options.
   b) To select and configure up to five billing lists to be displayed in the client pop-up window, use the grid under **Select up to five billing lists to be displayed on the client pop-up**:
      - Select the **Active** check box for the appropriate rows.
      - Click the **Caption** column and enter the caption text.
      - Click the **Input Type** column to select the input type.
      - Click the **Billing List** column to select a billing list. Billing lists are configured with the **Manage Billing Accounts** utility.
   c) If you want to display this pop-up window instead of the pop-up window defined for a Windows queue, select **Select this pop-up instead of the pop-up (if any) configured for the Windows queue**.

      If you have configured a pop-up window for the Windows queue, it is displayed by default. If you select this check box, this pop-up window will be displayed rather than that for the Windows queue.
7. To convert this profile to an advanced profile and manage the profile using rules, click **Advanced**. All selected items will be converted into rules and displayed in the **User Print Rules Manager** dialog box. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile. Complete the following steps to create an advanced profile.
   a) If any items were selected on the previous dialog box, they are now listed as rules on the **User Print Rules Manager** dialog box. Click each rule and review it in the preview section.
   b) The rules grid lists all of the defined rules in the order that they will be processed. The rules grid is editable. Use the following procedures from the rules grid:
      - To specify whether the rule is enabled or disabled, use the check box in the **Enabled** column.
      - To rename a rule, click the **Name** cell and make the change.
      - To modify the rule description, click the **Description** cell and make the change.
      - To change the follow-on action, click the **Follow-on Action** cell and select the action that you would like to take after this rule has been processed. You can continue processing rules or choose not to process any additional rules.
   c) Under the rules grid, use the following procedures to configure rules:
      - To create a rule, click **Add**. The **New User Print Rule** dialog box is displayed. For instructions about adding rules, see *How to Create User Print Rules* on page 254.
      - To modify a rule, select a rule and click **Modify**.
      - To delete a rule, select a rule and click **Remove**.
      - To create a copy of a rule, select a rule and click **Copy**. A copy of the selected rule will be created.
      - To reorder the rules, select a rule and click **Move Up** or **Move Down**.
   d) To save your changes, click **OK** or **Apply**.
8. When you have completed your tasks, click **Close**.

How to Create User Print Rules

Complete this procedure to create user print rules.

Administrators can create user print rules after converting a basic print rules profile to an advanced print rules profile. Conditions and actions are configured.

1. From the **User Print Rules Manager** dialog box, click **Add**.
2. Enter the **Name** and **Description** for the rule.

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3. Specify whether the rule will be enabled or disabled with the **Enabled** check box.
4. To always apply the rule, select the **Always execute this rule (no conditions)** check box.

   If you select this check box, the **When** box is unavailable because no condition statements are needed. Continue with step *6* on page 255.
5. If you do not want to always apply the rule, clear the check box and use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a rule condition, perform the following steps.
   a) In the **When** box, click the **<Target>** link. Use the list to select the appropriate condition.
   b) Click the **Operation** link and select the appropriate operation.
   c) Click the **Value** link and select the appropriate value. The condition statement is completed.
   d) To include additional condition statements or create groups of conditions:
      - Click a condition (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
      - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups of conditions. This step will also enable the **Add Condition** button for adding a condition to the selected group.
6. Under the **Perform the following actions** box, use the following procedures to manage actions.
   - To create an action, click the **<Action>** link. *To create actions* on page 255 provides more information on configuring actions.
   - To create additional actions, click **Add Action**.
   - To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
   - To delete an action, click the area next to the link and click **Remove Action**.
   - To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.
7. From the **Follow-on Action** box, choose whether you want to continue processing rules or process no further rules.
8. Click **OK** to save the user quota rule.

To create actions

You can create actions to ignore Windows queue restrictions, override the Windows queue pop-up window, disallow printing, perform cost accounting, route to a specified destination, set the document owner, set the document state, and notify about quota management restrictions. The steps necessary to configure these actions types are listed in the following table.

- Performs these steps to create actions.

Action	Description
To ignore Windows queue restrictions	Select this action if you want to display the client pop-up window rather than the pop-up window defined for a Windows queue. 1. In the **Perform the following actions** box, click the **<Action>** link. 2. Select **Ignore Windows queue restrictions**. No further configuration is required.

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Action	Description
To override Windows queue pop-up	Select this action if you want to display the client pop-up window rather than the pop-up window defined for a Windows queue. **1.** In the **Perform the following actions** box, click the **<Action>** link. **2.** Select **Override Windows queue** pop-up. No further configuration is required.
To route to destinations	Select this action to add or replace a destination for a document. **1.** In the **Perform the following actions** box, click the **<Action>** link. **2.** Select **Route to Destinations | Basic**. This opens the **Select Destinations** dialog box. **3.** Select a destination from the tree. **4.** Click the box at the bottom to indicate whether this address is to replace an existing address or added to the existing address. **5.** Click **OK**.
To disallow printing	Select this action if you want to disable printing for this user or group. **1.** In the **Perform the following actions** box, click the **<Action>** link. **2.** Select **Disallow Printing**. No further configuration is required.
To set a document owner	Select this action to specify the owner of a document. **1.** In the **Perform the following actions** box, click the **<Action>** link. **2.** Select **Set Document Owner**. This opens the **User and Group Selection** dialog box. **3.** Select the appropriate user or group in the grid. **4.** If the user or group you want is not listed, click **More Users** to search for additional users. See the *Adding users and groups to Output Manager* topic for detailed procedures on adding users. **5.** Click **OK**.
To set a document state	Select this action to change the state of a document.

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Action	Description
	1. In the **Perform the following actions** box, click the **<Action>** link. 2. Select **Set Document State**. This opens the **Set Document State** dialog box. 3. From the drop-down list, select the appropriate document state: Hold or Ready. 4. Click **OK**.
To notify about quota management restrictions	Select this action to specify that a user or group be notified about quota management restrictions and the notification method. 1. In the **Perform the following actions** box, click the **<Action>** link. 2. Select **Notify on Quota Management Restrictions**. This displays the **Notify on Quota Management Restrictions** dialog box. 3. You can choose to notify the user or group using email, with a pop-up window, or both. • To use email notification, select **Notify via email**. Select an email profile from the drop-down list or click the **Browse** button to manage profiles from the **Manage Outbound Email Profiles** dialog box. • To use a pop-up notification, select the **Notify via client pop-up** check box. 4. Click **OK**.

How to Create a Desktop Client Profile

Use this procedure to select an existing profile.

The desktop client profile configures general options for the desktop client and determines how print jobs are handled in disconnected mode.

1. From the grid, click the appropriate **Desktop Client Profile** cell and then click the **Browse** button.
   This opens the **Manage Desktop Client Profiles** dialog box.
2. Click **New**.
   This opens the **Desktop Client Profile dialog box**.
3. Enter a **Profile name** and **Profile description**.
4. Under **General Options**, determine if you want to display the client in the system tray and if you want to allow users to shut down the client and stop tracking.

   You can also define blacklists for excluding specific applications and specific queues from tracking.
5. Under **Handling of print jobs in disconnected mode**, choose one of the following options:

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- Disallow print jobs when disconnected
- Allow jobs and enforce quotas using cached information
- Allow all jobs and do not enforce quotas until reconnected

6. Under **Client popup options**, you can control whether pops are processed in batches, and also if they are to include previously selected billing accounts.
7. Click **OK**.
8. Click **Close**.

Assigning Costs to Billing Accounts

Manage Billing Accounts is used to create lists of billing accounts. PIN numbers can be associated with billing accounts

In the **Administration** application, **Allowances Profiles** can be configured on the **Manage Users** > **Balances** tab. These profiles are used to set initial and recurring balances for print and copies.

Copy/FAX/Scan costs for balance calculations can be assigned in the Devices configuration embedded tab. These are expressed as cost per page.

Allowances

Users can be restricted to a printing allowance. These allowances can be refreshed via an Allowances profile.

The Print Rules Profile controls information that is displayed on the Windows Client. The estimate print cost can be shown with the Windows Client.

Estimated print cost is computed using the values specified in **Source configuration More Settings** tab.

How to Configure Balance Settings

Complete this procedure to assign a print allowance.

Administrators can assign print balances to control costs.

1. Click the **Balances** tab.
2. Select the **Set Balance** check box.
   This enables grid cells to the right so that you can define the parameters of the allowance.
3. To specify the print allowances, click the browse button (**...**) for **Allowances Profile**.
4. Configure the allowances profile, save it, and assign it to the selected user.
5. For users, the current remaining balance is displayed in the **Remaining Balance** cell. To adjust the balance amount, click the cell and enter a new amount.
6. For users, you can specify the date that the new accounting period begins. Click the arrow in the **Next Refresh** cell and select a date.

   You can specify that the balance be refreshed on a particular date or you can specify that it be refreshed today.
7. Click **Apply**.

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How to Import Billing Accounts

Use this procedure to add billing accounts from a comma separated value (CSV) file into a billing list or update existing billing accounts in a billing list.

1. From the **Administration** application, click **Manage Billing Accounts**.
2. Create a billing list or select an existing billing list from the **Name** drop-down list box.
3. Click **Import**.
4. On the **Billing Accounts Import Wizard** dialog box, click **Next**.
5. Browse to the CSV file that contains the new or updated billing accounts.
6. If the first row of the file contains column header values, select **First row contains column headers**.
7. Select the type of delimiter that separates the values in the CSV file and click **Next**.
8. Map Nuance Output Manager properties to the imported values in the CSV file and click **Next**.
9. Verify that the information to be imported is correct.
10. Select one of the following options to change a value:
    - Change the value on the **Preview Import** screen and continue with step *11*.
    - Update the CSV file and restart this procedure.
11. Click **Next**.

    If the billing list is empty, click **Next** on the **Billing Account Import Validation** screen to finish importing the billing accounts.
12. If the billing list contains accounts:
    - Select **Replace existing list with file import** to remove all the accounts in the billing list and replace them with accounts in the CSV file.
    - Select **Append new Billing Accounts** to add accounts from the CSV file to the list of existing accounts in the billing list. If the CSV file contains accounts that are already in the billing list, the accounts in the billing list do not change after the import.
    - Select **Update Billing Accounts** to add new accounts from the CSV file to the billing list. If the CSV file contains accounts that are already in the billing list, the accounts in the billing list are updated with the account information in the CSV file.

      When updating billing accounts, you can use a value of `CLEAR` in the CSV file to delete the PIN codes from the corresponding accounts in the billing list.
13. Click **Next** and then click **Import**.

Managing Windows Queues

Administrators can use **Manage Windows Queues** utility to create and assign quota profiles to converted and external Windows queues. Quota profiles can be configured to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

- *Assign a quota profile*
- *Create a quota profile*

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How to Assign a Quota Profile

Complete this procedure to assign a quota management profile to a Windows queue.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Windows Queues**.
3. Click the **Server** tab to configure server queues or the **Workstation** tab to configure workstation queues.

   A server queue is a Windows queue that has been converted into a Nuance Output Manager source. Server queues use the Output Manager Port Monitor so that the data is received into the Nuance Output Manager spool. A workstation queue is a Windows printer that is not a Nuance Output Manager source (for example, a USB attached printer on an end user's workstation). The data is not received into Nuance Output Manager.

   Note: Notice the grid is displayed grouped by the **Server Name** column. This allows you to easily view all queues for a server. You can remove grouping by right clicking in the group panel and clicking **Clear Grouping**.
4. Click in the **Quota Profile** cell for the appropriate queue.
5. Select a quota management profile from the list, or click the browse button (**...**) to create or edit one.

   Clicking the browse button opens the **Manage Windows Queues Quota Profiles** dialog box.
6. If you are configuring an workstation queue, you can also specify the cost per page for black and white and color printing.
7. Once all of the changes have been made, click **Apply**.

How to Create a Quota Profile

Complete this procedure to create a basic quota management profile and assign it to a Windows queue.

1. From the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage Windows Queues**.
3. Select the **Server** tab to configure server queues or the **Workstation** tab to configure workstation queues.

   A server queue is a Windows queue that has been converted into a Nuance Output Manager source. Server queues use the Output Manager Port Monitor so that the data is received into the Nuance Output Manager spool. A workstation queue is a Windows printer that is not a Nuance Output Manager source (for example, a USB attached printer on an end user's workstation). The data is not received into Nuance Output Manager.

   Note: Notice the grid is displayed grouped by the **Server Name** column. This allows you to easily view all queues for a server. You can remove grouping by right clicking in the group panel and selecting **Clear Grouping**.
4. Click in the **Quota Profile** cell for the appropriate queue. You can select a quota management profile from the list or complete the following steps to create a new profile.
   a) In the **Quota Profile** cell, click the browse button (**...**).
   This opens the **Manage Windows Queue Quota Profiles** dialog box displays. This dialog box lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
   b) Click **New** to create a new profile.
   This opens the **Windows Queue Quota Profile** dialog box.
   c) Enter a **Profile name** and **Profile description**.
   d) Under **Restrictions - Disable Printing**, select the options that you want to disable printing.

   You can choose to always disable printing, or choose to disable printing if the document is not duplex, if the document page count or byte count exceeds a specified value, if the document contains color, or if the number of pages printed in a month exceeds a specified value.

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e) Under **Restriction Notification Options**, determine if you want to be notified when a restriction occurs.

   You can be notified using an email profile or on the client pop-up.

f) You can also configure the client pop-up to display for the Windows queue. To display the pop-up, select the **Show client pop-up for this Windows queue**.

   Notice the client pop-up configuration options are now available.

g) Under **Client pop-up general options**, select the appropriate check box options.

h) Under **Select up to five billing lists**, use the grid to select and configure up to five billing lists to be displayed in the client pop-up.

   - Select the **Active** check box for the appropriate rows.
   - Click in the **Caption** column and enter the caption text.
   - Click in the **Input Type** column to select the input type.
   - Click in the **Billing List** column to select a billing list.

     Billing lists are configured in the **Manage Billing Accounts** utility.

5. To convert this profile to an advanced profile and manage the profile using rules, click **Advanced**.
6. Complete the following steps to create an advanced profile.

   a) If any items were selected on the previous dialog box, notice they now appear as rules on the **Windows Queue Quota Rules Manager** dialog box. Click each rule and review in the preview section.

   b) The rules grid lists all of the defined rules in the order they will be processed. The rules grid is editable. Use the following procedures from the rules grid.

      - Use the check box in the **Enabled** column to determine if the rule is enabled or disabled.
      - To rename a rule, click in the **Name** cell and make the change.
      - To modify the rule description, click in the **Description** cell and make the change.
      - To change the follow-on action, click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

   c) Under the rules grid, use the following procedures to configure rules.

      - To create a rule, click **Add**. The **Windows Queue Quota Rule** dialog box displays.
      - To modify a rule, select a rule and click **Modify**.
      - To delete a rule, select a rule and click **Remove**.
      - To create a copy of a rule, select a rule and click **Copy**. This will create a copy of the selected rule.
      - To reorder the rules, select a rule and click **Move Up** or **Move Down**.

   All selected items will be converted into rules and display in the **Windows Queue Quota Rules Manager** dialog box. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile.

7. Click **OK** or **Apply** to save your changes.

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Rules and Tasks

Rules

Nuance Output Manager supports rules for effective document processing, routing and control.

Nuance Output Manager includes rules in the following categories.

Category	Description
Business rules	Business rules can be used to perform tasks such as to as sign document ownership, route documents, transform d ocuments from one printer language to another, split doc uments, modify the contents of documents, and so forth.
AdHoc rules	AdHoc rules run on user-selected documents that are spo oled. Complete rules can be processed using conditions, or just actions for unconditional processing. AdHoc rule s can be scheduled.
Alert rules	Alert rules specify actions when certain events occur.
Error handling rules	Error handling is controlled using Error Handling Profil es, which can be assigned to any destination to define th e behavior in the event of errors occurring at the destinat ion.
Failover Rules on page 303	Failover and automatic re-routing of a document is contr olled using settings in the error handling profile in conju nction with a failover profile.

Business Rules

Administrators can create business rules to assist in automating document processes for unattended operation. Business rules can be used to perform tasks such as to assign document ownership, route documents, transform documents from one printer language to another, split documents, modify the contents of documents, and so forth.

Administrators can create business rules to assist in automating document processes for unattended operation. When a condition is found to be true, the configured action will take effect.

- *Manage business rules*
- *Create business rules*
- *Create business rule actions*

Business rules are processed against each document, after it enters the spool and before it is available for routing. The rules processor tests the received document against each rule in turn, beginning with the first defined and enabled rule and ending when a condition match occurs. By default, only actions of a single rule are applied to a document.

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How to set up business rules

Business rules are set up and managed in the Business Rules Manager.

1. To open the **Business Rules Manager**, click **Tools** > **Business Rules**.

   In the **Business Rules Manager** you can create or modify business rules as well as adjust the processing order of the rules.
2. To create a new rule, click the **Add** button.
   This opens the **New Business Rule** dialog box.
3. In the **Name** box, type the name for the rule.
4. Optional: In the **Description** box you can briefly describe the purpose of the rule.
5. For **Rule definition**, either select the **Always execute this rule**, click **<Target>** in the **When** box, and define **Document** or **System** conditions to invoke a rule:

Type	Defines
Document	Document conditions to apply for rule.
System	Day and time conditions to apply for rule.

   For example, **Document** lets you specify virtually any property associated with the document. After you select a target, you click to choose an **<Operation>**, such as **Is Equal To** or **Begins With**, and then click **<Value>** to specify a value. The operations and values depend on the selected target.
6. Click the **Add Condition** button to add another conditions to the current group, or click **Remove Condition** to delete the currently selected condition.

   Conditions within a group are logically combined by **AND** or **OR**. You can click the logical operator on a condition to switch between **AND** and **OR**.
7. Click a group radio button (the left radio button) to select the group. You can then click **Remove Group** or **Add Group**.

   Groups are logically combined by **AND** or **OR**. You can click a logical operator between groups to switch between **AND** and **OR**.
8. In the **Perform the Following Actions**, click **<Action>** to add actions to perform as targeted in the **When** box.

   Actions are performed in the order that they appear in this box. You can click buttons to add, modify, remove, and reorder actions.
9. For **Follow-on Action**, specify whether to continue processing rules after completing actions specified by this rule.

How to Create Business Rules

Use this procedure to create a business rule. You will configure conditions and actions.

1. In the Output Manager Console menu bar, click **Tools** > **Business Rules**.
   This opens the **Business Rules Manager** dialog box.
2. To create a new rule, click **Add**.
   This opens the **Business Rule** dialog box.
3. Enter a rule **Name** and **Description**.
4. Use the **Enabled** check box to determine if the rule is enabled or disabled.
5. If you want to apply the rule to all documents, select the **Always execute this rule (no conditions)** check box.

   This will disable the **When** box, as no condition statements are needed. If you select this option, skip to step 7.
6. Use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A box is used to indicate a condition group. To create a rule condition, perform the following steps.

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a) In the **When** box, click the **<Target>** link. Use the list to select a **Document** or **System** condition.
b) Click the **Operation** link and select the appropriate operation.
c) Click the **Value** link and select the appropriate value to complete the condition.

To include additional condition statements or create groups of conditions:

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.

7. Under **Perform the following actions** box, use the following procedures to manage actions.

- To create an action, click the **<Action>** link and select one of the actions.

  For more information about configuring actions, see *Create business rule actions*.
- To create an action, click the **<Action>** link and select an action.
- To create additional actions, click **Add Action**.
- To modify an action, click the action link or click the area next to the link, and then click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

8. From the **Follow-on Action** list, click the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

Note: When new documents are created as a result of a rule action, the processing of the new documents varies from the processing of the original document. The new documents continue with the next rule action. The original document, if you choose **Continue processing rules**, skips the next rule actions in the current rule, and goes to the next rule. Transform, Burst, and sometimes Advanced Document Modification actions create new documents. For example, when you transform a document from postscript to PDF, a new document is created, or when you burst a document into 10 documents, 10 new burst documents are created.

9. Click **OK** to save your business rule.

How to Manage Business Rules

This procedure provides the basic steps for managing business rules.

1. On the Output Manager Console menu bar, select **Tools** > **Business Rules**.
   This opens the **Business Rules Manager** dialog box displays. The business rules grid lists all of the defined business rules in the order they will be processed.
2. Selecting a rule will display the rule for preview below the grid. Use the following procedures to edit rules in the grid.

To	Do this
Determine if a rule is enabled or disabled	Use the check box in the **Enabled** column
Change the follow-on action	Click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.
Modify the rule	Double-click the row.

3. Under the business rules grid, use the following procedures to configure rules.

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To	Do this
Create a rule	Click **Add** to open the **Business Rule** dialog box.
Modify a rule	Select a rule and click **Modify**.
Delete a rule	Select a rule and click **Remove**.
Create a copy of a rule	Select a rule and click **Copy**.
Rename the rule	Double-click the rule or select the new rule and click **Modify**.
Reorder the rules	Select a rule and click **Move Up** or **Move Down**.

4. Click **OK** or **Apply** to save your changes.

Create Business Rule Actions

Use this procedure to create business rule actions.

Business rule actions are created to perform actions on documents. Examples include routing to destinations, transforming to other print languages, assigning to document folders, and editing document properties.

Steps necessary to configure action types are listed by procedures in this section. Perform the steps in the appropriate procedure to configure business rule actions.

Action	Description
Assign Profiles to Document	• *Set Failover Profile* — Specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). • *Set Filter Profile* — Associates a filter profile with a document. This filter will be used for document viewing and reprinting. • *Set Library Filing Profile* — Sends documents to the document library. Specifies the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting. • *Set Notification Profile* — Sends notifications when specific events occur in the document life cycle. • *Set Output Process* — Performs processing such as search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.
Burst	• *Line Mode* — Bursts line data documents based on: data contained in the document, desired output size and size of original document, and number of output documents desired. • *Page Mode* — Splits printer ready documents based on: data contained in the document (regions are used to determine burst conditions), desired output size and size of original document, and number of output documents desired.

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Action	Description
Extract Text	• *Line Mode* — Extracts text from line data documents using rows and columns. • *Page Mode* — Extracts text from printer ready documents using regions (rectangles).
Modify Document Contents	• *Advanced Document Modification* — Runs the ADM process. In this process each page of the document is read, portions of the document can be changed or values extracted, and then the page is written. This can be used as an advanced way to extract text, burst, or perform other operations on the document.
Modify Document Exceptions	• Remove All Document Exceptions • Remove Matching Document Exceptions • Set All Document Exceptions • Set Matching Document Exceptions
Set Document Properties	• *Set Document Properties* — Allows you to configure document properties. • Set Document Properties from Web Service (REST)
Route to Destinations	• *Advanced* — Allows you to use a CSV file to dynamically pick destinations based on a document property. • *Basic* — Specifies the destinations where documents should be sent.
Set Document Owner	Configures the document owner.
Transform Document	• *Adept* — Transforms documents using the Adept transform suite. • *Page Mode* — Transforms the format of a printer ready document to a new format, and/or to another data type. • *Record Mode (Advanced)* — Transforms line data from one line format to another. • *Record Mode (Basic)* — Performs the most common transforms for data coming from a Output Manager Print Server device. This converts .tnj to ASCII text, .anj to AFP, and .bnj to .bin.
Analyze Document	Processes documents and populates document properties.
Assign to Document Folder	Assigns documents to specific document folders.
Convert Fixed Block to Variable Block	Converts FBA to VBA and FBM to VBM. It can be used when dealing with mainframe tape formats.

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Action	Description
Delete Document	Deletes documents.
Delete Client Popup	
Move Document to File Store	Moves documents to another location (file store).
Package Banner	Adds a banner to the beginning of the package. The ban ner will be added as a separate document within the sam e package.
Power Rule	Allows you to build multiple rules inside of one rule.
Remove from Document	
Run Ad hoc Rule	Runs an existing ad hoc rule.
Run Command	Performs a command line operation on the document.
Schedule Output	Schedules documents to print at a specific date and time.
Send Email	Sends email messages when specific events occur in the document life cycle.
Set Billing Accounts	Documentation coming soon
Set Document State	Sets the document state to hold or ready.
Set Retain Period	Determines how long documents will be retained.
Unpackage	Separates documents that are in a package so they can ac t as individual documents in Nuance Output Manager.
Unzip Document	
User Information Stamping	Adds the user name or other value and date to document s.
Watermarking	Adds a watermark from a PNG file to documents.

To set failover profiles

Use this action to determine what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents).

1. In the **Perform the following actions** box, click the **<Action>** link and then click **Assign Profiles to Document** > **Set Failover Profile**.

   This opens the **Set Failover Profile** dialog box.
2. Select an existing **Profile** from the list or click **New** to create a new failover profile.

   In the **Failover Profile** dialog box, you can determine what should happen if all of the retries fail and when to place the document in an error state.

   You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Failover Profiles** dialog box which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
3. When you have selected your profile, click **OK**.

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To set filter profiles

Use this action to associate a transform filter to a document. This filter tells Nuance Output Manager how to format fonts and additional information for printing. This filter is used when the document is viewed or printed.

1. In the **Perform the following actions** box, click the **<Action>**link, and then click **Assign Profiles to Document** > **Set Filter Profile**.

   This opens the **Set Filter Profile** dialog box.
2. To prevent the filter profile from parsing information, do the following:
   a) Click the **Calculate profile from parse of a document property** browse button (**...**) to open the **@Parse** dialog box.
   b) Configure the @parse function as necessary, then click **OK**.

      For instructions on configuring the function, see *Configuring the @parse function*.
3. In the **Format** list, select the data type.
4. Select an existing **Profile** from the list or click **New** to create a new filter profile in the **Configure Filter Profile** dialog box.

   See *Configuring a CpMillProfile resource* for instructions on configuring a filter profile. If you chose to calculate the profile from the parse of a document property, you must still select a profile. This profile will be used if the @parse profile does not result in a valid filter profile.

   Note:

   Xerox and AFP data may require more than one input profile per document. To write multiple filter profiles for XRX, LCD, MMD, and AFP data types, name the profile in the following format:

   MyProfile**Description.

   Where "MyProfile" is used for all of the profiles that should be written out together. "Description" is not used in the comparison, so it can be anything. You must include the "**" for the profiles to be considered. For example, if you have an LCD profile and you want to write an XRX and an XIF profile with it, you could name them as follows:

   LCD profile: Profile1**MyLcdProfile
   XRX profile: Profile1**MyXrxProfile
   XIF profile: Profile1**MyXIFProfile

   If you have more than one profile of the same type with the same name up to the "**" the last one overwrites the others.
5. You can click **Edit** to edit the selected profile or click **Manage** to display the **Resource Manager** dialog box, which lists all of the defined profiles.

   When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
6. When you have selected your profile, click **OK**.

To set library filing profiles

Use this action to send documents to the document library. You will specify the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Assign Profiles to Document** > **Set Library Filing Profile**.
   This opens the **Set Library Filing Profile** dialog box.

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2. Select an existing **Profile** from the list or click **New** to create a new library profile from the **Document Library Profile** dialog box.
3. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Document Library Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles. Complete the following steps to configure a library profile.
   a) Click **New**.
   This opens the **Document Library Profile** dialog box.
   b) Specify the library profile **Name** and **Description**.
   c) Determine where documents will be placed in the library.

   You must first click the **Base folder** browse button (**...**) to select an existing folder. You can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name.

   The folder name can consist of text, one or more document properties, and functions. To insert document properties, right-click in the text box and click **Insert Document Property**. Some example document properties are date/time, document name, data type, and so on. To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions. Once you have entered the folder name, click **OK**.

   You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a sub folder of the folder above it in the list.
   d) Choose if you want to **Send email notification upon filing**.

   If you want to send an email notification when a document is sent to the library, select the check box and click **Email**. Configure the email setting on the **Send Email** dialog box.
   e) Specify the file store for documents sent to the library.

   You can choose to leave them in their current file store or move them to a specified file store.
   f) In the **Purge documents** box, specify how long documents should stay in the library before they are deleted.
   g) Click **OK**.
4. When you have selected your profile, click **OK**.

To set notification profiles

Use this action to send notifications when specific events occur in the document life cycle.

Notifications are sent according to defined notification profiles. Notification profiles specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. For example, you can configure a pop-up to display after a document prints successfully.

1. In the **Perform the following actions** box, click the **<Action>** link and click **Assign Profiles to Document** > **Set Notification Profile**. This opens the **Set Notification Profile** dialog box.
2. In the **Profile** list, click an existing profile or click **New** to create a new notification profile.
3. You can click **Edit** to edit the selected profile or click **Manage** to display the **Manage Notification Profiles** dialog box, which lists all of the defined profiles. When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles. Complete the following steps to configure a notification profile from the **Notification Profile** dialog box.
   a) Click **New**.
   b) Specify the profile **Name** and **Description**.
   c) If this profile will send email notifications, select the **Email profile** that will be used with those notifications.

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You can select an email profile from the list or click the Browse button and mange profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles using the **Outbound Email Profile** dialog box.

d) Click directly in the **Notifications** grid to configure the notifications that will be sent. You will need to configure each grid column. You can add and remove notifications (grid rows) using the **Add** and **Remove** buttons.

- **When the document** — Select when a notification will be sent. You can choose to send a notification when a document **Arrives**, **Prints Successfully**, **Prints on Failover Destination**, or **Is In Error State**.
- **Send notification via** — Select how the notification will be sent and displayed. You can choose to send notifications using the **Tray Client Pop-up** or as an **Email Message**.
- **Notify owner** — Choose if the document owner will be sent a notification.
- **Recipients** — Click the Browse button to select who will receive the notification. You can select users and groups in the **User and Group Selection** dialog box. If the user or group you want is not listed, click **More Users** to search for additional users. See *Adding users and groups to Nuance Output Manager* for detailed procedures on adding users.
- **Message** — Enter the notification text. You can insert document properties in the body text by right-clicking in the text box, clicking **Insert Document Property**, and choosing the appropriate properties. Document properties will display enclosed in brackets ([]). The values of the properties will display in the notification. To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review *Using Nuance Output Manager Functions* for information on configuring functions.

4. Click **OK**.
5. When you have selected your profile, click **OK**.

To set output processes

Use this action to impact a document as it is being sent to a destination.

Examples of actions performed on a document include search and replace, setting finishing options, editing PJL commands, and inserting overlays.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Assign Profiles to Document** > **Set Output Process**.
   This opens the **Set Output Process** dialog box.
2. Select an existing **Profile** from the list or click **New** to create a new output process using the **OM Process Designer**.

   See *Working with output processes* for specific output process procedures.
3. You can click **Edit** to edit the selected profile, or click **Manage** to display the **Manage Output Process Profiles** dialog box, which lists all of the defined profiles.

   When managing profiles, you can create, import, and export profiles, as well as manage all existing profiles.
4. When you finish selecting a profile, click **OK**.

To burst using line mode

Use this action to split line data documents (text documents with or without carriage control) based on data contained in the document, desired output size, or number of output documents desired.

Bursting creates new documents. For example, when you burst a document into 10 documents, 10 new burst documents are created. The new burst documents continue with the next rule action. The original document, if you choose "continue processing rules," skips the next rule actions in the current rule, and goes to the next rule.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Burst** > **Line Mode**.
   This displays the **Extract Text** tab in the **Burst - Line Mode** dialog box.

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2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Detect**, choose to detect the text to extract by **Lines** or by **Records**.
   - Choose **Lines** if you want to use carriage control when specifying the position of variables on the page.
   - Choose **Records** to count records, ignoring carriage control, when specifying the position of variables on the page.
4. In the **Format** list, click the data format.
5. In the **Code page** list, click the associated code page.
6. If desired, select **Banner mode**.
   a) In the **Search for** box, specify the text that defines the recognition string.
   b) In the **Page** box, specify the page at which to start searching.
   c) In the **Column** box, specify the column at which to start searching.
   d) In the **Lines** boxes, enter the line numbers between which you would like to search.

   Selecting this option allows the recognition string location to vary on the page. This will search the document for a recognition string. The recognition line becomes line 1 and the extraction variables will be relative to it.
7. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
   a) Click **New**.

      This opens **Text Extraction Variable Definition** dialog box.
   b) Enter the **Name**, **Description**, and **Type** of extraction variable.

      There are two types of extraction variables, those used for bursting and those used to extract data.
   c) If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
   d) Under **Location on page**, specify the **Line/Record** number from which the text will be extracted.

      If you are using record mode, it will be the record number of the current page (that is, variables on page 2 and greater are relative to line 1 on that page). If you selected **Banner mode**, the recognition line becomes line 1 and the extraction variables are relative to it.
   e) In the **Column** box, specify the start column for the extraction.
   f) In the **Extract** box, enter the number of characters to extract.
   g) If this is an **Extract** type variable, under **Page selection** specify the page of the newly created burst document from which you want to extract the text.

      You can enter a **Page** number or select **First page with non-blank value in selected location**.
   h) Click **OK**.

      Once a variable of a particular type has been created, it cannot be changed to the other type.
8. On the **Burst Conditions** tab, specify what how to create the new documents. You can create documents using one of the following options:

Option	Description
Extracted variables	Allows for selecting the extraction variables created from the **Extract Text** tab as conditions in the **Burst when** box. You can choose the extraction variable and condition that will cause new documents to be created.
Number of pages	Allows for splitting documents based on the number of pages. When you select this option, the **Split.Pages in new document** and **Split.Pages in current document** variables are available in the **Burst when** box.

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Option	Description
Number of output documents	Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages and you set the number of output documents to 3, you would get 3 output documents of 33 pages each. If necessary, you can select extraction variables created from the **Extract Text** tab as conditions in the **Burst when** box. Nuance Output Manager will find the position in the source document where the split should occur based on pages per documents, and then start a new document after the additional condition is met. This allows the boundary between split documents to be better controlled based on the contents of the document.

9. The **Burst when** box is used to create and manage the burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a burst condition, perform the following steps. If you chose to split based on the number of output documents, the **Burst when** box is not available.
   a) In the **Burst when** box, click the **<Target>** link and select the appropriate variable. The variables that display vary depending what the split is based on.

Variable	Description
Extracted variables	The extraction variables added on the **Extract Text** ta b will be listed in the menu.
Number of pages	You can choose the following variables: • **Split.Pages in current document** — Specifies the total number of pages in the current document. • **Split.Pages in new document** — Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages. **Note:** For example, if you create a condition [where **Split.Pages in new document** is equal to 20 AND **Split.Pages in current document** is between to 0 AND 200, when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst

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Variable	Description
	document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document. • **Number of output documents** — The extraction variables added on the **Extract Text** tab will be listed in the menu.

b) Click the **Operation** link and select the appropriate operation.

c) Click the **Value** link and select the appropriate value. This condition statement is completed.

d) To include additional condition statements or create groups of conditions:

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups.

  This will also enable the **Add Condition** button for adding a condition to the selected group.

e) Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed.

You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

10. On the **Set Document Properties** tab, configure the document properties for the newly created burst documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

a) Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:

- **Always Apply** – Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
- **Apply Conditionally** – Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** – Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

b) Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value.

You can use functions to insert and extract data as necessary. See *Using Nuance Output Manager Functions*.

11. Click **OK** to save the business rule.

To burst using page mode

Use this action to burst printer ready documents. Regions (rectangles) are used to determine burst conditions. Or splitting is based on the desired output size of documents or the desired number of output documents.

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1. In the **Perform the following actions** box, click the **<Action>** link, and click **Burst** > **Page Mode**.
   This displays the **Extract Text** tab in the **Burst Document - Page Mode** dialog box.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package for bursting or *create one*.
4. Select the **Override input filter profile assigned to document** check box if you want to use the filter profile configured in the transform package.

   Selecting this check box overrides the input filter profile assigned to the document. Clearing the check box uses the filter profile configured in the transform package.
5. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
6. Under **Extraction variables**, create one or more variables that will be used for bursting or extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
   a) Click **New**.
      This opens the **Text Extraction Variable Definition** dialog box.
   b) Enter the **Name**, **Description**, and **Type** of extraction variable. There are two types of extraction variables, those used for bursting and those used to extract data.
   c) If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
   d) Under **Location on page**, specify the region (rectangle) from which text will be extracted. This is done by entering the upper left corners X and Y coordinates, width, and height.

      Tip: The region values can be found by viewing a document with the Nuance Output Manager viewer. In the viewer, click **View** > **Text Selection Mode** in the menu bar. Then, drag the cursor to select the desired region. The coordinates will appear in the status bar.
   e) If this is an **Extract** type variable, under **Page selection** specify the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
   f) Click **OK**.

      Once a variable of a particular type has been created, it cannot be changed to the other type.
7. From the **Burst Conditions** tab, specify what how to create the new documents. You can create documents using one of the following methods:

Option	Description
Extracted variables	Allows for selecting the extraction variables created from the **Text Extraction Variable Definition** dialog box as conditions in the **Burst when** box. You can choose the extraction variable and condition that will cause new documents to be created.
Number of pages	Allows for splitting documents based on the number of pages. When you select this option, the **Split.Pages in new document** and **Split.Pages in current document** variables are available in the **Burst when** box.
Number of output documents	Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages, and you set the number of output documents to 3, you would get 3 output documents of 33 pages each.

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8. The **Burst when** box is used to create and manage the burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a burst condition, perform the following steps. If you chose to split based on the number of output documents, the **Burst when** box is not available.
   a) In the **Burst when** box, click the **<Target>** link and select the appropriate variable. The variables that display vary depending what the split is based on.
      - If **Extracted variables** is selected, the extraction variables added from the **Text Extraction Variable Definition** dialog box will be listed in the menu.
      - If **Number of pages** is selected, you can choose the following variables:

        Split.Pages in current document — Specifies the total number of pages in the current document.

        Split.Pages in new document — Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages.

      For example, if you create a condition where **Split.Pages in new document** is equal to 20 AND **Split.Pages in current document** is between to 0 AND 200, when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document.
   b) Click the **Operation** link and select the appropriate operation.
   c) Click the **Value** link and select the appropriate value. This condition statement is completed.
   d) To include additional condition statements or create groups of conditions:
      - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
      - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
   e) Under **Output format**, you can specify if you want to transform the document in this rule action. You can leave the output format the same as the input format or change it to a format in the list.
   f) Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed. You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
9. On the **Set Document Properties** tab, configure the document properties for the newly created burst documents. The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
   a) Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
      - **Always Apply** — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.

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- **Apply Conditionally** — Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** — Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

b) Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary (see *Using Nuance Output Manager Functions*).

10. Click **OK** to save the business rule.

To extract text using line mode

Use this action to extract text from line data documents (text documents with or without carriage control) using rows and columns.

1. In the **Perform the following actions** box, click the **<Action>** link and then click **Extract** > **Line Mode**.
   This opens the **Extract Text** tab in the **Burst Document - Line Mode** dialog box.
2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Detect**, determine if you want to detect the text to extract by **Lines** or **Records**.

Option	Description
Lines	Select this option if the lines end with carriage controls and you know the number of lines per page. You will need to enter the value.
Records	Select this option if your document does not have carriage controls at the ends of the lines or if you do not know how the lines will appear on the page.

4. In the **Format** list, click the data format.
5. In the **Code page** list, click the associated code page.
6. Optional: If desired, select **Banner mode**. This will search the document for a banner, and the banner text will become the start of the new document.
   - In the **Search for** box, specify the text that defines the banner.
   - In the **Page** box, specify the page at which to start searching for the banner text.
   - In the **Column** box, specify the column at which to start searching for the banner text.
   - In the **Lines** boxes, enter the line numbers between which you would like to search for the banner text.
7. Under **Extraction variables**, create one or more variables that will be used for extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
   a) Click **New**.
   This opens the **Text Extraction Variable Definition** dialog box.
   b) Enter the **Name** and **Description** of extraction variable.
   c) If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
   d) Under **Location on page**, specify the **Line/Record** number from which the text will be extracted. If this is record mode, it will be the record number of the entire document.
   e) In the **Column** box, specify the start column for the extraction.
   f) In the **Extract** box, enter the number of characters to extract.
   g) Under **Page selection** specify the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
   h) Click **OK**.

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8. On the **Set Document Properties** tab, configure the document properties for the newly created documents.
   a) Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, select how the property should be applied when a document is sent to a destination. You can choose from the following options:
      - **Always Apply** — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
      - **Apply Conditionally** — Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
      - **Informational Only** — Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
   b) Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value. You can use functions to insert and extract data as necessary.
9. Click **OK** to save the business rule.

To extract text using page mode

Use this action to extract text from documents using regions (rectangles).

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Extract** > **Page Mode**.
   The **Extract Text** tab displays in the **Burst Document - Page Mode** dialog box.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or *create one*.
4. If you want to override the input filter profile assigned to the document and use the filter profile in the transform package, select the **Override input filter profile assigned to document** check box. Clear this check box if you want to use the filter profile configured in the transform package.
5. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
6. Under **Extraction variables**, create one or more variables that will be used for extraction. You can add, modify, and remove variables using the buttons above the grid. To add a new variable, complete the following steps.
   a) Click **New**.
      This opens the **Text Extraction Variable Definition** dialog box.
   b) Enter the **Name** and **Description**, and **Type** of extraction variable.
   c) If you want to remove spaces that exist at the start and end of the extracted text, select **Trim spaces**.
   d) Under **Location on page**, specify the region (rectangle) from which text will be extracted. This is done by entering the upper left corners X and Y coordinates, width, and height.

      Note: The region values can be found by viewing a document with the Nuance Output Manager viewer. In the viewer, select **View Text Selection Mode** in the menu bar. Then, drag the cursor to select the desired region. The coordinates will appear in the status bar.
   e) Under **Page selection** specify the page of the newly created document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.
   f) Click **OK**.
7. On the **Set Document Properties** tab, configure the document properties for the newly created documents.

   The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

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8. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value** column, choose one of the following options to determine how the property should be applied when a document is sent to a destination:

Option	Description
Always Apply	Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
Apply Conditionally	Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
Informational Only	Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

9. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value column,** specify the document property value.

   You can use functions to insert and extract data as necessary. For more information, see *Using Nuance Output Manager Functions*

10. Click **OK** to save the business rule.

To modify document contents

Use ADM to modify the contents of documents.

ADM (Advanced Document Modification) is a process where each page of the document is read, portions of the document can be changed, or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, bar codes added, OMR marks added, and logos changed using ADM. ADM can be executed in a business rule action or in the output process.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Modify Document Contents** > **Advanced Document Modification**.
   This displays the **Configuration** tab in the **Modify Document** dialog box.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or *create one*.
4. In the **Additional Parameters** box, specify additional parameters needed for the transform software.
5. Use the **Override input filter profile assigned to document** check box option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.
6. In the **Unit library** list, you can select an existing unit library or create one.

   Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, and page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations. For more information on configuring unit libraries, contact Nuance Communications

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Professional Services. See the *Configuring a cpMillUnitLibrary resource* topic for instructions on creating a unit library from the **Configure Unit Library dialog box**.

7. Next to **Unit library will create** select one of the following options:

Option	Description
the same document	Select if your unit library is modifying the input document and writing it to the same location. See the default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created.
different document(s)	Select if your unit library is modifying the current document and outputting it into a new document, or if your unit library is bursting the document into many different documents. See default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created.
multiple documents combined into one	Currently not available.

8. Under **Follow-on action**, specify the action you would like the input document (original document) to take after this rule has been processed.

   You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

9. On the **Document properties** tab, configure the document properties for the newly created documents.

   The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

10. Expand the category of the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode/Value column, s**elect how the property should be applied when a document is sent to a destination. You can choose from the following options:

Option	Description
Always Apply	Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
Apply Conditionally	Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
Informational Only	Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

11. Under each print preference are the parameters needed to generate that print preference. In the **Mode/Value** column, specify the document property value.

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You can use functions to insert and extract data as necessary. For more information, see *Using Nuance Output Manager Functions*

12. Click **OK**.

To route to destinations (Advanced)

Use this action to use a CSV file to dynamically pick destinations based on a document property.

1. In the **Perform the following actions** box, click the **<Action>** link and then click **Route to Destinations** > **Advanced**.
   This opens the **Route to destination (Advanced)** dialog box.
2. Select how you want to locate the CSV file. You can use one of the following options:

Option	Description
Path	Enter the path and file name of the CSV file, or click the browse button (**...**) to navigate to the file.
Resource	Select the appropriate resource from the list, or click the browse button to choose the resource from the **Manage CsvDocProp Resources** dialog box.

3. In the **Lookup data** box, right-click and then click the document property that will control the routing.

   The value contained in this document property will determine the row used in your .csv file.

   For example, the following table shows an example .csv file using the Class property. To route by Class using this example, select **Class** in the **Lookup data** box, enter **MyClass** in the **Key column name** box, and **MyPrinter** in the **Destination column name** box. When the document is routed the value of the Class property will determine which destination is used. For example, if the Class value is A, the document will be routed to printer 1.

MyClass	MyPrinter
A	printer1
B	printer2
C	printer3

4. In the **Key column name** box, enter the column name in your CSV file that corresponds to the selected document property.
5. In the **Destination column name** box, enter the column name in your CSV file that contains the destination name where you want the documents routed.
6. In the list below the tree, choose if you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
7. Click **OK**.

A new routing action is shown in the actions box. The action lists all of the selected destinations.

To route to destinations (Basic)

Use this action to specify the destinations where documents should be sent.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Route to Destinations** > **Basic**.
   This opens the **Select Destination** dialog box.
2. Select the appropriate destinations in the tree.

   You can select multiple destinations by pressing the Ctrl or Shift keys and selecting destinations. Selecting a destination group will select all destinations in that group.

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3. In the list below the tree, choose if you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
4. Click **OK**.

A new routing action is shown in the actions box. The action lists all of the selected destinations.

To set document properties

Use this action to configure document properties.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Document Properties** > **Basic**.
   This opens the **Document Properties** dialog box.
2. In the grid, configure the document properties.
   The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.
3. In the grid, expand the category of each the property you want to configure. The first node level in the category determines the print preferences for the properties it contains. In the **Mode** column, select how the property should be applied when a document is sent to a destination. Click in the grid cell and choose from the following options:

Option	Description
Always Apply	Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
Apply Conditionally	Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
Informational Only	Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

4. In the **Value** column, specify the document property value.
   You can use functions to insert and extract data as necessary. For more information, see *Using Nuance Output Manager Functions*.
5. Click **OK** to save the business rule.

To transform documents using the Adept transform suite

Use this action to transform documents using the Adept transform suite.

Important: If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Nuance Support to ensure the data is converted properly.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Transform Document** > **Adept**.
   This opens the **Transform Adept** dialog box displays.

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2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Parameters**, configure the following options as needed:

To configure	Do this
Convert from	Select the format you are converting from **Xrx** and/or **Afp**. In the **To** list, specify the format you are converting to.
Ini	Specify the resource that will control the format of the printed output. You can select a defined Ini resource in the list or click Browse to create, modify, or import Ini resources from the **Resource Manager** dialog box. Ini resources are created using the **Ini Resource** dialog box.
Ini description	Specify the Ini description.
Ini default	Select the Ini resource that will be used as the default.
Exe path	Click the browse button (**...**) and select the Adept executable path.

4. Select the **Follow on actions** check box for the input document (original document).

   You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.
5. Click **OK**.

To transform documents using page mode

Use this action to transform the format of a printer ready document to a new format, and/or to another data type.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Transform Document** > **Page Mode**.
   This opens the **Configure Transform** dialog box.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or *create one*.
4. Use the **Override input filter profile assigned to document** check box option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.
5. In the **Output format** list, click the format of the output file.
6. Configure the conversion of each input format in the **Input formats** grid and then click **OK**.
   - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select Do Not Transform.
   - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column.

     To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output tab** or **PDF output tab** will also be visible.
7. Select the **Follow on actions** for the input document (original document).

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You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

8. Click **OK**.

To transform documents using record mode (Advanced)

This advanced option is used to perform custom conversions using DCO chains. This provides flexibility to specify code pages, carriage controls, record formats, and other options for the incoming document and the desired output.

Important: If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Nuance Support to ensure that the data is converted properly.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Transform Document Record Mode (Advanced)**.
   This opens the **Transform Record Mode (Advanced)** dialog box.
2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Under **Parameters**, configure the following options as needed:

Option	Description
Code page in	Specify the code page that represents the current status of the input document. The default format is 037 (EBCDIC).
Code page out	Specify the code page that represents how the file is being transformed. The default format is 437 (ASCII).
FCB	Select the FCB resource that will control the vertical format of printed output. You can select a defined FCB in the list or click the browse button (**...**) to create, modify, or import FCB resources. See *Configuring an FCB resource* for instructions on creating an FCB resource in the **FCB Resource dialog box**.
FCB description	Click to view/update the description of the selected FCB.
FCB default	Select the default FCB. The default is STD, a predefined FCB with 66 lines and channel stop 1 on line 1.
In type	Specify the input data type.
Out type	Specify the output data type.
Data type after conversion	Select the data type of the output documents.
Use block lengths	Determine if you want to enable or disable the use of block lengths in the record. When this option is selected, records include a block count. The block count will directly precede the record count. In the following example, `00 0C 00 00 00 08 00 00 F1 F2 F3 F4`

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Option	Description
	the block count is `00 0C 00 00` and the record count is `00 08 00 00`.
FCB override	Use this list to enable or disable overriding FCBs. Selecting **Yes** causes FCBs in the beginning of the data to be ignored, functioning as if there were no FCBs in the data.
Send FCB	Use this list to enable or disable sending FCBs to the printer.
Delimiter	Select the type of delimiter you want to use. Choose one of the following: • None — Records do not include delimiter characters. • ASCII — Records include an ASCII delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above. • EBCDIC — Records include an EBCDIC delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above.
Truncate trailing blanks	Enable or disable the truncating of trailing blanks.
Pad record	Enable or disable record padding. Selecting Yes pads blank records with a space.
Pad skip1	Enable or disable pad skip to channel 1. Selecting Yes pads blank records with a space.
Length	Specify the length of the fixed records. The default value is 80.
Follow on actions	Specify follow on actions for the input document (original). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

4. Click **OK**.

To transform documents using record mode (Basic)

Use this action to perform the most common transforms for data coming from a Output Manager Print Server device. This converts .tnj to ASCII text, .anj to AFP, and .bnj to .bin.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Transform Document** > **Record Mode (Basic)**.
   This opens the **Transform Record Mode (Basic)** dialog box.
2. In the **Server** list, click the licensed rules agent server that you would like to use.
3. Select the **Follow on actions** for the input document (original document).

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You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

4. Click **OK**.

To analyze documents

Use this action to process documents and populate document properties.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Analyze Document**. The **Analyze Document** dialog box displays.
2. In the drop-down list, select the server where the document should be analyzed.
3. Use the check box options to determine the document properties that should be populated. Select the properties you want populated.

Property	Description
Use quick page counting for PDF documents	Enables optimized page counting for PDF jobs. When this option is enabled, the other options are disabled.
Count pages	Reads the entire document and sets the total number of pages for the document.
Detect data type	Reads the first portion of the document and attempts to determine the documents data type. This works well for postscript, PDF, and PCL files.
Detect trays	Looks for input and output tray settings.
Detect color	Reads the entire document looking for pages that contain color information.
Detect duplex	Looks for duplex commands in the document.

4. Click **OK**.

To assign to document folders

Use this action to assign documents to specific document folders.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Assign to Document Folder**. This opens the **Select Document Folder** dialog box.
2. Select the appropriate folder in the tree.
3. Click **OK**.

To convert fixed block to variable block

Use this action to convert FBA to VBA and FBM to VBM. It can be used when dealing with mainframe tape formats.

1. In the **Perform the following actions** box, click the <Action> link and then click **Convert Fixed Block To Variable Block**.
2. Specify the fixed block record length in bytes.
3. Click **OK**.

To delete documents

Use this action to delete documents.

- In the **Perform the following actions** box, click the **<Action>** link, and then select **Delete Document**.

No additional configuration is required.

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To move documents to a file store

Use this action to move documents to another location (file store).

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Move Document To File Store**.
   This opens the **Move Document To File Store** dialog box.
2. In the **File Store** list, select the new file store location.
   The list displays all file stores defined in the **Set General Preferences Utility**.
3. Click **OK**.

To prepend a banner

Use this rule to add a banner to the beginning of a package. The banner will be added as a separate document within the same package.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Package Banner**.
   This opens the **Package and Prepend banner** dialog box.
2. In the **Resource** list, select an existing banner resource, or click **New** to create a banner resource using the **Banner Resource** dialog box.

   See *Configuring a banner resource* topic for instructions on creating a banner resource.
3. Click **OK**.

To create power rules

Use this action to create a power rule for building multiple rules inside of one rule.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Power Rule**.
   The **Power Rule dialog box** displays. Each rule contained in the power rule is represented as one row spanning the **Conditions** and **Actions** grids.
2. To manage the condition statements, click **Select conditions** and use the following procedures from the **Select Conditions** dialog. When you are finished working with conditions, click **OK**.

To	Do this
Add conditions to the rule	Select the appropriate conditions in the **Available conditions** list and click **Add**. The conditions are moved to the **Selected conditions** list. When you click **OK**, the new conditions will be displayed as columns in the **Conditions** grid.
Remove conditions from the rule	Select the appropriate conditions in the **Selected conditions** list, and click **Remove**. The conditions are moved to the **Available conditions** list. When you click **OK**, these conditions will be removed from the **Conditions** grid.
Change the condition processing order	Select a condition and click **Move up** or **Move down**. When you click **OK**, the new order will display in the **Conditions**grid. Conditions are processed in the **Selected conditions** list order, from top to bottom.

3. Configure the condition statements by clicking directly on the **Conditions** grid.

   For each rule, you must specify the **Operator** and **Value**. If you have more than one condition, you will also need to select the **Conjunction**, either AND or OR.

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4. To manage the action statements, click **Select actions** and perform the following procedures in the **Select Actions** dialog box.

To	Do this
Add actions to the rule	Select the appropriate actions in the **Available actions** list and click **Add**. The actions are moved to the **Selected actions** list. When you click **OK**, the new actions will be displayed as columns in the **Actions** grid.
Remove actions from the rule	Select the appropriate actions in the **Selected actions** list and click **Remove**. The actions are moved to the **Available actions**list. When you click **OK**, these actions will be removed from the **Actions** grid.
Change the action processing order	Select an action and click **Move up** or **Move down**. When you click **OK**, the new order will display in the **Actions** grid. Actions are processed in the **Selected actions** list order, from top to bottom.

5. When you are finished working with actions, click **OK**.
6. Click directly in the **Actions** grid to configure the action statements for each rule.

Statement	Description
Route to Destination	Click the browse button (**...** to display the **Destinations** dialog box. Select the appropriate destinations in the tree. You can select multiple destinations by pressing the Ctrl or Shift keys and selecting the destinations. Selecting a destination group will select all destinations in that group. When finished, click **OK**.
Set Document Folder	Click the browse button (**...**) to display the **Document Folders** dialog box. Select the appropriate folders in the tree. You can select multiple folders by pressing the Ctrl or Shift keys and selecting folders. When finished, click **OK**.
Set Document Library	Select an existing profile from the list or click the browse button (**...**) to create or manage profiles in the **Manage Document Library Profiles** dialog box.
Set Document Owner	From the **User and Group Selection** dialog box, select the appropriate user or group in the grid. If the desired user or group is not listed, click **More Users** to search for additional users. Click **OK**.
Set Document State	In the list, select one of the following document states: **Any**, **Ready**, **Hold**, or **Error**.

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Statement	Description
Set Failover Profile	Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Failover Profiles** dialog box.
Set Notification Profile	Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Notification Profiles** dialog box.
Set Output Process	Select an existing profile from the list or click the Browse button to create or manage profiles from the **Manage Output Process Profiles** dialog box.
Set Schedule	Click the browse button (**...**) to display the **Schedule** dialog box. Specify the appropriate values for the **Day** and **Time** options. You can choose to print the documents today, on a specific day, or in the future. Click **OK**.

7. Use the following procedures to control the individual rules contained in the power rule. Each rule is represented as one row spanning the **Conditions** and **Actions** grids.

To	Do this
Create a rule	Click **Add**. A row will be added to the bottom of both grids.
Delete a rule	Select a rule and click **Remove**. The selected row will be deleted from both grids.
Create a copy of a rule	Select a rule and click **Copy**.
Reorder the rules	Select a rule and click **Move up** or **Move down**.

8. Click **OK**.

To run ad hoc rules

Use this action to select an ad hoc rule.

1. In the **Perform the following actions** box, click the **<Action>** link, and select **Run AdHoc Rule**.
2. In the **AdHoc rule** list, select an existing ad hoc rule.
3. In the **Run mode** list, choose if you want to run the rule against all documents in the spool or against all newly received documents since the last time the rule was run.

   The rule will not be run against retained documents.
4. Click **OK**.

To run commands

Use this action to perform a command line operation.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Run Command**.
   This opens the **Run Command** dialog box.
2. Enter the command line.

   To insert document properties in the command line, right-click in the text box and click **Insert Document Property**. Some example document properties are date/time, document name, data type, and so on. To insert

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functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

3. Choose the server you want to run the command.
4. Click **OK**.

To schedule output

Use this action to schedule documents to print at a specific date and time.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Schedule Output**.

   This opens the **Schedule** dialog box.
2. Set the appropriate **Day** option.

   You can choose to print the documents today, on a specific day, or in the future.
3. Set the appropriate **Time** option.

   You can choose to print as soon as possible, at a specific time, or in the future.
4. Click **OK**.

To send emails

Use this action to send email messages when specific events occur in the document life cycle.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Send Email**.
   This opens the **Send Email** dialog box.
2. In the **Profile** list, click the appropriate email profile.

   You can also click the browse button (**...**) to open the **Manage Outbound Email Profiles** dialog box. This dialog box lists all of the defined email profiles, so that you can use it to create, import, and export profiles, as well as to manage all existing profiles. To create a new email profile, click **New**, and configure the email profile from the **Outbound Email Profile dialog box**. When you are finished, click **OK**, and then click **Close**.
3. In the **Send Email** dialog box, select the **Priority** level of the email message.

   You can select an importance level of low, normal, or high.
4. Enter the email addresses you want to be sent notifications in the **To**, **CC**, and **Bcc** boxes.

   You can enter multiple email addresses separated by a comma.
5. In the **Reply to** box, enter an email address where replies will be routed.

   You can enter multiple email addresses separated by the comma.
6. Enter the email **Subject** text.
7. In the **Digest** group, specify whether to send the notification messages for multiple events concatenated into one email. To enable the digest feature, in the **Send Digest** list, choose from the following options:

Option	Description
Every interval	Sends the digest according to the time interval specified. You will receive a message every interval, even if no alerts were received during the interval.
At time interval	Sends the digest according to the time interval specified. The time interval will start when the first notification messages is received. You will be notified when at least one notification has been received.
Every hour	Sends the digest every hour. You will receive a message every interval, even if no alerts were received during the interval.

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Option	Description
Every half hour	Sends the digest every half hour. You will receive a message every interval, even if no alerts were received during the interval.

If necessary, specify the **Interval** in minutes. In the **Max Alerts** box, you can specify the maximum number of alerts to be included in the digest.

8. Enter the body text.

   To insert document properties in the body text, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The values of the properties will display in the email message. To insert functions, right-click in the box, select **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.
9. Click **Validate** to validate the body text.
10. Click **OK**.

To set document owner

Use this action to configure the document owner.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Document Owner**. This opens the **User and Group Selection** dialog box.
2. Select the appropriate user or group in the grid.

   If the desired user or group is not listed, click **More Users** to search for additional users.
3. Click **OK**.

To set document states

Use this action to set the state of documents to hold or ready.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Document State**.

   This opens the **Set Document State** dialog box.
2. In the list, click the appropriate document state, **Hold** or **Ready**.
3. Click **OK**.

To set retain periods

Use this action to determine how long documents will be retained.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Retain Period**.

   This opens the **Set Retain Period** dialog box.
2. Set the retain period.
   - Use the **Retain for** options to retain documents for a specified time period. Time periods can be specified in years, months, days, hours, and minutes.
   - Use the **Retain until** options to retain documents until a specified date and time.
3. Click **OK**.

To unpackage documents

Use this action to separate multidocument packages into individual documents.

- In the **Perform the following actions** box, click the **<Action>** link, and then click **Unpackage**.

No additional configuration is required.

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To add user information to documents

Use this action to add user information and a date to documents.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **User Information Stamping**.

   The **User Information Stamping** dialog box opens.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or *create one*.
4. In the **Additional Parameters** field, specify additional parameters needed for the transform.
5. In the **Text to stamp** field, do one of the following:

   - Type the text to appear on the document.
   - Right-click in the field and select **Insert Other Property** > **Other Properties**. Select a property from the document.

   You can use PCL, PDF, PS, and Plain Text files. Documents in other formats must be transformed into one of the supported formats before this feature will work properly.
6. Configure the format and location of the text.
7. Click **OK**.

To add a watermark to documents

Use this action to add a watermark to indicate the status or security level of a document.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Watermarking**.

   The **Watermarking** dialog box opens.
2. In the **Server** list, click the licensed transform server that you would like to use.
3. In the **Transform package** list, you can select an existing transform package or *create one*.
4. In the **Additional Parameters** field, specify additional parameters needed for the transform.
5. You can use an existing watermark or create a new one. Do one of the following:

   - In the **Watermark/Stamp** list, select one of the existing watermarks: **Confidential**, **Do Not Copy**, **Draft**, or **Internal**.
   - Click **New**. In the **Create Resource** dialog box, complete the fields for the new watermark. In the **Import Resource Data** section, click **Browse** and select the file you want to use as a watermark.

   You can use PCL, PDF, and PS files. Documents in other formats must be transformed into one of the supported formats before this feature will work properly.
6. Click **OK**.

To create a new transform package

Use these steps to create a new transform package, when applicable to new business rules, instead of using an existing one.

1. In the **Transform Package** section, click **New**.
   This displays the **General** tab.
2. Enter the transform package **Name**.
3. Select the transform package type.
4. If you selected a third-party transform package, verify that the **EXE path** is set to the correct folder.

   The default EXE path is @EOMTransformDir. To change the path, type in the box or click the browse button (**...**).
5. Set the **Logging State**.

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The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and pre-production testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.

6. On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.
   - To configure a profile, click the browse button (**...**) in the **Modify/New** column for the appropriate formats, and then in the **Configure Filter Profile** dialog box, configure the profile as needed.

     The profile contains a communications and printer definition section. For instructions on configuring a filter profile, see *Configuring a CpMillProfile resource*.
   - To select a profile, click in the **Configuration** column for the appropriate formats and select the profile from the list.
7. On the **Resources** tab, specify where the transform software will find the resources needed for the transformation.

   For example, PDF fonts are usually found at the location of an Adobe installation.
8. On the **Fonts** tab, you can control the font mapping of input fonts to output fonts.

   The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.
9. Click **OK** to create the transform package.

Ad Hoc Rules

AdHoc rules run on user-selected documents that are spooled. Complete rules can be processed using conditions, or just actions for unconditional processing. AdHoc rules can be scheduled.

Ad hoc rules are used for documents that exist in Nuance Output Manager, where business rules are used for documents as they enter Nuance Output Manager. Ad hoc rules can be initiated by scheduling a task in the **Schedule Manager**, by using the **Run Now** option in the **Ad Hoc Rules Manager**, or by running a configured rule in the **Documents** grid or business rules. An example use for ad hoc rules is to merge a set of documents into a package.

AdHoc rules are built with the Rules Manager, which is opened by clicking **Tools** > **AdHoc Rules** on the menu bar. Rules Manager has a complete list of how AdHoc rules can be used, Uses include modifying document contents, assigning document ownership, routing documents, running business rules, and setting document state. AdHoc rules can also be used to create and manage packages, which contain collections of documents.

- *Manage ad hoc rules*
- *Create ad hoc rules*
- *Create ad hoc actions*

How to Manage Ad Hoc Rules

This procedure provides the basic steps for managing ad hoc rules.

1. On the Output Manager Console menu bar, click **Tools** > **Ad Hoc Rules**.
   This opens the **Ad Hoc Rules Manager** dialog box. In this dialog box, the ad hoc rules grid lists all of the defined ad hoc rules in the order they will be processed. Selecting a rule will display the rule for preview below the grid. To modify the rule, double-click the row.
2. Under the ad hoc rules grid, use the following procedures to configure rules.

To	Do this
Create a rule	Click **Add**. This opens the **Ad Hoc Rule** dialog box.

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To	Do this
Modify a rule	Select a rule and click **Modify**.
Delete a rule	Select a rule and click **Remove**.
Create a copy of a rule	Select a rule and click **Copy**. Then, to rename the new rule, either double-click the rule or select the rule and click **Modify**.
Reorder the rules	Select a rule and click **Move Up** or **Move Down**.
Run a rule now	Select a rule and click **Run Now**. On the menu that displays, you can choose to run the rule against all documents in the spool or against all newly received documents since the last time the rule was run. The rule will not be run against retained documents.

3. Click **OK** or **Apply** to save your changes.

How to Create Ad Hoc Rules

Use this procedure to create an ad hoc rule. You will configure conditions and actions.

1. On the Output Manager Console menu bar, click **Tools** > **Ad Hoc Rules**.
   This opens the **Ad Hoc Rules Manager** dialog box.
2. Under the ad hoc rules grid, click **Add**.
   This opens the **Ad Hoc Rule** dialog box.
3. Enter the **Name** and **Description** for the rule.
4. If you want to apply the rule to all documents, select the **Always execute this rule (no conditions)** check box.

   This will disable the **When** box as no condition statements are needed. If you select this option, skip the steps for configuring conditions.
5. Use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a rule condition, perform the following steps.
   a) In the **When** box, click the **<Target>** link. Use the list to select the appropriate condition.
   b) Click the **Operation** link and select the appropriate operation.
   c) Click the **Value** link and select the appropriate value. This condition statement is now completed.
   d) To include additional condition statements or create groups of conditions:
      - Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
      - Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.
6. Under **Perform the following actions** box, use the following procedures to manage actions.

To	Do this
Create an action	Click the **<Action>** link and click one of the following actions. • **Run Business Rules** — Specifies if you want to run business rules against input or output documents.

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To	Do this
	• **Set Document Properties** — Configures document properties. • **Delete Document** — Deletes documents. • **Set Priority in Group** — Sets the priority (print order) in a group. • **Assign to Document Folder** — Assigns documents to specific document folders. • **Document Owner** — Configures the document owner. • **Route to Destinations** — Specifies the destinations where documents should be sent. • **Document State** — Sets the document state to hold or ready. • **Create Package** — Configures a package of documents. • **Zip Package** — Zips the merged document or any other documents in Nuance Output Manager. • **Merge Package** — Configures the document properties of the merged file. For more information about creating actions, see *Create Ad Hoc Actions*.
Create additional actions	Click **Add Action**.
Modify an action	Click an action link or click the area next to the link, and then click **Modify Action**.
Delete an action	Click the area next to the link and click **Remove Action**.
Reorder the actions	Click the area next to the action link and click **Move Up** or **Move Down**.

7. Move the actions to their appropriate position by clicking the area next to the action link and clicking **Move Up** or **Move Down**.

   The order of ad hoc rule actions is important, as the action behavior can depend on where it occurs in the sequence of actions. By default the actions apply to the targeted documents. For example, if your rule contains a **Create Package** action, the create package will act upon the targeted documents.

   In contrast, actions that follow an action that produces documents, will apply to the produced documents. Using the previous example, if following the **Create Package** action you have a **Merge Package** action followed by a **Set Document Properties** action, a **Set Document State** action, and a **Route to Destination** action, the merge package action will apply to the package created by the **Create Package** action, and the latter three actions will apply to the resultant merged documents from the **Merge Package** action. If you had a **Set Document Properties** action that preceded the **Create Package** action, it would apply to the original targeted documents.
8. Click **OK** to save your ad hoc rule.
9. You can run ad hoc rules using the following procedures.

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- Schedule a task to run the ad hoc rule using the **Schedule Manager** dialog box. For more information, see *Scheduling Tasks*.
- Use the **Run Now** option in the **Ad Hoc Rules Manager** dialog box to run a selected rule.

  You can run the rule against all documents in the spool or against all newly received documents since the last time the rule was run. The rule will not be run against retained documents.
- In the **Documents** grid, select one or more documents, right-click, and then click **Run Ad hoc Rule**. You can run any of the rules listed in the submenu.

  Only rules with the **Allowed for document right click** option selected in the **Adhoc Rule** dialog box are displayed in the menu.
- From business rules, configure the **Run Adhoc Rule** action. For more information, see *Working with Business Rules*.

How to Create Ad Hoc Actions

You can create the following ad hoc rule actions.

- *Run business rules*
- *Set document properties*
- *Delete documents*
- *Set the priority in a group*
- *Assign to document folder*
- *Set document owners*
- *Route to destinations*
- *Set the document state*
- *Create a document package*
- *Create a zip package*
- *Create a merge package*

To run business rules

Use this action to determine if you want to run business rules against input or output documents.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Run Business Rules**. This opens the **Run Business Rules** dialog box.
2. Select if you want to run business rules against **Input** documents and/or **Output** documents.
3. Click **OK**.

To set document properties

Use this action to configure document properties.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Document Properties**. This opens the **Document Properties** dialog box.
2. In the grid, configure the document properties.
   a) Expand the category of the property you want to configure.
   The first node level in the category determines the print preferences for the properties it contains.
   b) In the **Mode** column, select how the property should be applied when a document is sent to a destination. Click in the grid cell and choose from the following options:
      - **Always Apply** — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands

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for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.

- **Apply Conditionally** — Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** — Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

c) In the **Value** column, specify the document property value.

You can use functions to insert and extract data as necessary. For more information, see *Using Nuance Output Manager Functions*

The grid lists the property values that can be configured grouped in the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

3. Click **OK**.

To delete documents

Use this action to delete documents.

In the **Perform the following actions** box, click the **<Action>** link, and then click **Delete Document**.

No additional configuration is required.

To set the priority in a group

Use this action to set the print order when multiple documents are packaged together.

The order of the document properties set by this action determines the print order when sent to the destination.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Priority in Group**. This opens the **Set Priority In Group** dialog box.
2. In the **Ordering properties** list, select the properties that you want to determine the print order. As you select properties, they are moved to the **Selecting order** list.
3. To reorder properties, select properties in the **Selecting order** list and click **Move up** and **Move down**.
4. Click **OK**.

Example package:

```
Doc 1: Priority 1 Total Pages: 5
Doc 2: Priority 2 Total Pages: 2
```

If Priority in Group is set to Priority (1st) and Total Pages (2nd), then the documents would print in Doc 1, Doc 2 order. If Priority in Group is reversed and set to Total Pages, then the documents would print in Doc 2, Doc 1 order.

To assign to document folder

Use this action to assign documents to specific document folders.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Assign to Document Folder**. This opens the **Select Document Folder** dialog box.
2. Select the appropriate folder in the tree.
3. Click **OK**.

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To set document owners

Use this action to configure the document owner.

1. In the **Perform the following actions** box, click the **<Action>** link, and then select **Set Document Owner**. This opens the **Set Document Owner** dialog box.
2. You can determine the document owner from a user reference property.

   To do this, select **Calculate document owner from user reference property** and select **User**, **Group**, or **User or Group**.
3. To specify a default owner, click the browse button (**...**) and select appropriate the user or group from the **User and Group Selection** dialog box.

   If the desired user or group is not listed, click **More Users** to search for additional users.
4. Click **OK**.

To route to destinations

Use this action to specify the destinations where documents should be sent.

1. In the **Perform the following actions** box, click the **<Action>** link and click **Route to Destination(s)**. This opens the **Select Destination** dialog box.
2. In the tree, select destinations.

   You can select multiple destinations by pressing the Ctrl or Shift keys and selecting destinations. Selecting a destination group will select all destinations in that group.
3. In the list below the tree, choose whether to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.
4. Click **OK**.

A new routing action is shown in the actions box. The action lists all of the selected destinations.

To set the document state

Use this action to set the state of documents to hold or ready.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Set Document State**. The **Set Document State** dialog box displays.
2. From the list, click the appropriate document state, Hold or Ready.
3. Click **OK**.

To create a package of documents

Use this action to create a package of documents. This will take all of the documents that meet the criteria and put them in a multiple document package.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Create Package**. This opens the **Create Package** dialog box.
2. Enter the **Naming prefix** for the package document.

   This prefix will be added to all packages created by this action. The naming prefix is especially useful when the create package action will be run by a scheduled rule. Each time the rule runs and generates a new package, the prefix will added. If you have multiple scheduled rules running that generate different packaging, you will be able to distinguish the resulting packages based on the original rule. It does not prefix any documents contained within the packages.
3. If you want to package documents based on document properties, click **Grouping property**, and then in the drop-down list, select the property to group by.

   For the selected property, documents are grouped into packages by each unique value of that attribute. For example, you selected **Form Name** for grouping and you have 20 documents that are being packaged. In

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the documents, 3 have the value of "Form-A", 5 are "Form-B", 10 are "Form-C", and 2 are "Form-X". Once packaged, you will end up with 4 packages, 1 for each unique form type. All "Form-A" documents will be in their own package, "Form-B" documents in their own package, and so forth.

4. In the **Ordering properties** list, select the document properties that will control the order the documents are packaged. As you select properties, they display in the **Selected order** list.

   Note: Only the allowed properties selected in the **Configure Document Properties Utility** will display in the **Ordering properties** list.

5. Select properties in the **Selected order** list and use the **Move up** and **Move down** buttons to configure the property order.
6. Use the following options to configure the closing conditions for the package. This will determine when the package is complete. You can configure one or more closing conditions.

Option	Description
Closing document	Select this option to close the package once the specified closing content is received. In the **Closing document action** box, choose if you want to remove the closing content, add it to the current page, or add it to the next page. In the **When** box, configure the conditions for specifying the content.
Time elapsed since package creation	Select this option to close the package when a specified amount of time has elapsed since the package was created (the first document was added to the package). Specify the time period using the options next to **Elapsed time**.
Time elapsed since last match	Select this option to close the package every period of time specified. Specify the time period using the options next to **Elapsed time**.
Specific time of day has occurred	Select this option to close the package at a specified time each day. Use the **Time of day** spin box to specify the time.
Auto close (For "Run Now" or document right-click configuration)	Select this option to close the package (or packages when grouping) when the last target document has been packaged by the action.

   Important: This option is used for running an ad hoc rule using the **Run Now** button on the **Ad Hoc Rules Manager dialog box**, or when right-clicking a document in the Documents grid and selecting a rule from the **Run Ad hoc Rule** submenu.

7. Click **OK**.

To create a zip package

Use this action to zip the merged document or any other document in Nuance Output Manager.

1. In the **Perform the following actions** box, click the **<Action>** link and select **Zip Package**.
   This opens the **Zip Package** dialog box.
2. Enter the **Zip File Name** in the box.
3. If this rule will be used after all documents have been received into Nuance Output Manager, select **Used as a post-processing action**.

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4. Determine what will happen to the **Original documents** after the zipped file has been created.

   You can leave them in the spooler, move them to retain, or delete them.
5. Click **OK**.

To create a merge package

Use this action to create a merged file. You can use this action after creating a package to merge all of the documents in to a single document.

1. In the **Perform the following actions** box, click the **<Action>** link, and then click **Merge Package**.
   This opens the **Merge Package** dialog box.
2. Next to **Transform**, click the **Configure** button to configure the transform.
   This opens the **Configure Transform** dialog box.
3. In the **Server** list, click the licensed transform server that you would like to use.
4. In the **Transform package** list, you can select an existing transform package or create one. Complete the following steps to create a transform package.
   a) Click **New**.

      This opens the **General** tab.
   b) Enter the transform package **Name**.
   c) Select the transform package type.
   d) If you selected a third-party transform package, verify that the **EXE path** is set to the correct folder.

      The default EXE path is @NSiTransformDir. To change the path, type in the box or click the browse button (**...**).
   e) Set the **Logging State**.

      The logging state determines if transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. All log files should be inspected during installation and preproduction testing to insure that fonts are correctly mapped. In a production system, the logging can be disabled to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.
   f) On the **Filter Profiles** tab, specify how the transform software will handle the formatting for each data type.

To	Do this
Configure a profile	Click the browse button (**...**) in the **Modify/New** colu mn for the appropriate formats. From the **Configure Filter Profile** dialog box, configure the profile a s needed. The profile contains a communications and printer definition section. See *Configuring a CpMillProfile resource* for instructions on configurin g a filter profile.
Select a profile	Click in the **Configuration** column for the appropriat e formats and select the profile from the list.

   g) On the **Resources** tab, specify where the transform software will find the resources needed for the transformation.

      For example, PDF fonts are usually found at the location of an Adobe installation.
   h) On the **Fonts** tab, you can control the font mapping of input fonts to output fonts.

      The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid.

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i) Click **OK** to create the transform package.

5. Use the **Override input filter profile assigned to document** check box option to determine if you want to override the input filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.
6. In the **Output format** list, click the format of the output file.
7. Configure the conversion of each input format in the **Input formats** grid, and then click **OK**.
   - For all unlicensed input formats and any input formats you don't want to use, click in the **Configuration** column and select **Do Not Transform**.
   - For licensed input formats, you can select **Use Default Options** or select a predefined configuration in the **Configuration** column. To configure a custom input format, click the ellipsis button in the **Modify/New** column. If **Use Default Options** or **Do Not Transform** is selected in the **Configuration** column, a new configuration will be created. If a predefined configuration is selected, that configuration will be modified. The custom transform options are configured on the **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output** tab or **PDF output** tab will also display.
8. When the transform configuration is complete, click **OK**.
   The **Merge Package** dialog box indicates the transform has been configured.
9. Complete the following steps to configure **Package boundaries**.
   a) Select **Package boundaries** and click **Configure**.
   This opens the **Package Boundary Fields** dialog box.
   b) From the grid, expand the sections to select the document properties that will be used as package boundaries.
   c) Click **OK**.

   Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.
10. Under **Merged Document Properties**, determine if you want to use the document properties from the first page in the documents or the last page in the documents.

    Selecting custom properties is not yet available.
11. Complete the following steps to configure **Exception fields**.

    Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).

    a) Select **Exception fields** and click **Configure**.
    This opens the **Exception Fields** dialog box.
    b) From the grid, expand the sections to select the document properties that will be used as exception fields.
    c) Click **OK**.

    Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).
12. Determine if you need to **Add blank pages for duplexing**. This will cause documents to always start on an odd page number.
13. Determine what will happen to the **Original documents** after the merged file has been created. You can leave them in the spooler, move them to retain, or delete them.
14. Click **OK**.

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Alert Rules

Administrators can create alert rules for configuring alert options when certain events happen. This is particularly useful for monitoring printer states. Using alert rules, support personnel can be automatically notified when printers have conditions that could prevent end user printing.

- *Create alert rules*
- *Manage alert rules*

How to Create Alert Rules

This procedure demonstrates how to create an alert rule and to configure conditions and actions.

1. From the menu bar click **Tools** > **Alert Rules**.
   This opens the **Alert Rules Manager** dialog box.
2. Under the alert rules grid, click **Add**.
   This opens the **Alert Rule** dialog box.
3. Enter a rule **Name** and **Description**.
4. Select or clear the **Enabled** check box to determine whether the rule is enabled or disabled
5. Use the following steps to create a rule condition from the **When**box. You must select values for all definitions to save the rule.
   a) In the **Destination State** statement, click the **<Values>** link.
   b) In the **Select Alert** dialog box, expand the **SNMP Device Alerts** tree and the **Destination Alerts** tree and select the options that the alert rule should perform the actions on.

      Selecting a section will select all conditions it contains.
   c) In the **Destination** statement, click the **<Values>** link.
   d) In the **Select Destination** dialog box, click the appropriate destination in the tree.

      Press Ctrl or Shift while you click to select multiple destinations.
   e) In the **Fault** statement, click the link and choose between the **Occurs** and **Behavior** options.
      - **Occurs** — The action will be executed when the fault occurs. The fault condition will not be evaluated. This is the default selection
      - **Behavior** — This displays a **<Values>** link. Click the link to configure the fault behavior. From the **Fault Behavior** dialog box, configure whether the behavior that triggers the rule action is active for the time period chosen, or if the fault behavior is repeated so many times before the rule action is fired. If you do not want this level of granularity for the fault condition, select the **Occurs** behavior.
   f) In the **Remainder interval** statement, click the link to configure the reminder interval on the **Notification Reminder** dialog.

      This allows you to repeat the action over a period of time. If you want the action to only send the notification once, set the value for the notification reminder interval to 0 and the value will change to **None**. The default reminder interval is **None**.
6. Use the following steps to create a send email rule action.
   a) In the **Perform the following actions** box, click the **<Action>** link and select **Send Email**.
      This opens the **Send Email dialog box**.
   b) Select a **Profile** from the list.

      You can also click the browse button (**...**) to display the **Manage Outbound Email Profiles** dialog box. This dialog box lists all of the defined email profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.
   c) To create a new email profile, click **New**.

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d) Configure the email profile from the dialog box. When you are finished, click **OK**, and then **Close**.
e) In the **Send Email** dialog box, enter the email address you want to be sent notifications in the **To**, **CC**, and **Bcc** boxes.

   You can enter multiple email addresses separated by a comma.
f) In the **Reply to** box, enter an email address where replies will be routed.

   You can enter multiple email addresses separated by a comma.
g) Enter the email **Subject** text.
h) Under **Digest**, you can enable the digest feature by choosing one of the following options in the **Send Digest** list:

Option	Description
Every interval	Sends the digest according to the time interval specifi ed. You will receive a message every interval, even if no alerts were received during the interval.
At time interval	Sends the digest according to the time interval specifi ed. The time interval will start when the first notificat ion messages is received. You will be notified when a t least one notification has been received.
Every hour	Sends the digest every hour. You will receive a mess age every interval, even if no alerts were received du ring the interval.
Every half hour	Sends the digest every half hour. You will receive a message every interval, even if no alerts were receive d during the interval.

   If necessary, specify the **Interval** in minutes. In the **Max Alerts** box, you can specify the maximum number of alerts to be included in the digest.
i) Enter the body text.

   To insert document properties in the body text, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The values of the properties will display in the email message. To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.
j) Click **Validate**.
k) Click **OK**.

7. You can create, organize, and remove rule actions using the buttons below the actions box.

8. From the **Follow-on Action** list, click the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

9. Click **OK** to save your alert rule.

How to Manage Alert Rules

This procedure provides the basic steps for managing alert rules.

The alert rules grid lists all of the defined alert rules in the order they will be processed. Selecting a rule will display the rule for preview below the grid.

1. On the Output Manager Console menu bar click **Tools** > **Alert Rules**.
This opens the **Alert Rules Manager** dialog box.

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2. Perform the following tasks to edit the rules grid.

To	Do this
Enable or disable a rule	• Select or clear the check box in the **Enabled** column.
Change the follow-on action	• Click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

3. In the alert rules grid, perform any of the following tasks to add, remove, modify, copy or reorder alert rules.

To	Do this
Create a rule	• Click **Add**. This opens the **Alert Rule** dialog box. For more information about creating rules, see *Create Alert Rules*.
Modify a rule	• Select a rule, and click **Modify**.
Delete a rule	• Select a rule and click **Remove**.
Create a copy of a rule	1. Select a rule and click **Copy**. This creates a copy of the selected rule. 2. Click in the **Name** cell of the copied rule to rename it.
Reorder the rules	• Select a rule and click **Move Up** or **Move Down**

4. Click **OK** or **Apply** to save your changes.

Error Handling Rules

Error handling is controlled using Error Handling Profiles, which can be assigned to any destination to define the behavior in the event of errors occurring at the destination.

When an error at the destination occurs during document processing, or if the destination is determined to be in an error condition (for example, SNMP reports paper), error processing can result in the destination being placed offline and, if so configured, for any documents routed to that destination to undergo failover processing.

Error handling is configured on the **Error Handling** tab of the **Destination Configuration** dialog box.

Failover Rules

Failover rules control how to automatically switch to a different destination when errors occur.

Failover profiles are created with the **Failover Profile** dialog box, which is accessed by clicking on the **More Settings** tab of the **Destination Configuration** dialog box.

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A failover profile can be assigned to a document at the source, or using business rules. In the absence of a profile assigned to the document, the default failover profile can be used.

The default failover profile places a document in an error state after all retries fail. You can add and configure a failover profile to route the document to a destination. The follow options are available for configuring a failover profile:

- Place a document in error state.
- Reroute a document to the default failover group of the failing destination.
- Reroute the document to a specified location.
- Reroute the document to a destination in a specified property.

Using Output Manager functions

Nuance Output Manager functions are used to insert information into a document property. The @parse, @dateTimeToString, @schedule, and @stringToDateTime functions allow you to extract data from a document property and insert it into another document property.

Review the following table for a description of each function. Click the links for steps on how to configure each function.

Function	Description
@dateTimeToString	Converts a date/time (usually from another document property) to a string.
@lookupCsv	Looks up the value for a property in a CSV file.
@parse	Extracts data from a document property.
@schedule	Inserts a time into a document property.
@stringToDateTime	Converts a string (usually from another document property) to a date/time value.
@Counter	Specifies the name format for newly created burst documents.

How to Configure the @dateTimeToString Function

This function converts a date/time (usually from another document property) to a string.

Use this procedure to configure the `@dateTimeToString` function. This function converts a date/time to a string in the format specified. This string will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property, and then click **Insert Function** > **@datetimeToString**. This opens the **@DateTimeToString** dialog box.
2. In the **FieldSource** box, specify the document property that contains the date/time string you want to insert.
   a) Right-click in the box.
   b) Click **Insert Document Property**.
   c) Select the document property from the list.
3. In the **Format** box, enter the format the date/time string will use when it is inserted into the document property.
   See the *Format grids* for descriptions of the available formats.
4. In the **Culture** box, specify the culture name of the data in the document.

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The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.

5. Click **OK**.
   The function is inserted into the document property using the following format:

```
@dateTimeToString([FieldSource],"Format",Culture)
```

How to Configure the @lookupCsv Function

This function looks up the value for a property in a CSV file.

Use this procedure to configure the @LookupCsv function. This function looks up the value for a property in a comma separated values file. The value will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property and click **Insert Function** > **@lookupCsv**.
   This opens the **@LookupCsv** dialog box.
2. Select how you want to locate the CSV file. You can use one of the following options:

Option	Description
Path	Enter the path and file name of the CSV file, or click the browse button (**...**) to navigate to the file.
Resource	Select the appropriate resource from the list, or click the browse button to choose the resource in the **Manage CsvDocProp Resources** dialog box. If you are using a resource, `CsvDocProp:` will be inserted before the resource name.

3. In the **Lookup data** box, specify the data you are looking up. This could be data from another document property or the results of a `@parse` function.

To	Do this
Select a document property	Right-click in the box, click **Insert Document Property**, and then select the appropriate property from the list.
Use the results of a `@parse` function	Right-click in the box, click **Insert Function**, and then **@parse()** from the list. Configure the `@parse` function using the **@Parse** dialog box.

4. In the **Key column name** box, enter the column name in your CSV file where Nuance Output Manager should look for a value that matches the data you entered in the **Lookup data** box.
5. In the **Data column name** box, enter the column name in your CSV file that contains the value you want inserted into the document property.
6. Click **OK**.
   The function is inserted into the document property using the following format:

```
@lookupCsv("path/resource",lookup data,key column name,data column name)
```


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How to Configure the @parse Function

This function extracts data from a document property.

Use this procedure to configure the `@parse` function. The parse function is used to extract data from a document property (such as Document Name). The parse function will extract data using character offset (specifying a beginning position and length), single delimiters (specify just the starting delimiter, it will be used as the only delimiter, field number, and length), and double delimiters (specifying a starting delimiter, ending delimiter, field number, and length). When you create a business rule action to set document properties, the parsing command should be entered in the appropriate **Value** cell in the **Document Properties** dialog box.

1. Right-click in the appropriate document property, and then click **Insert Function @parse**.
   This opens the **@Parse** dialog box.
2. Right-click in the **FieldSource** box, click **Insert Document Property**, and select the document property from which data will be extracted.
   The document property will appear in brackets in the field source box.
3. Determine if you want to extract data using character offset or double delimiters. Complete the steps in the appropriate section below.
   - *Extract using character offset*
   - *Extract using delimiters*

To extract using character offset

1. Select **Field**.
2. In the **Position** box, specify the first position of the string to be extracted.
   The first character of source data is indicated by specifying a 1.
3. In the **Length** box, specify the length of the string to be extracted.
   If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.
4. Click **OK**.

The function is inserted into the document property using the following format:

```
@parse([FieldSource], "delimiter", field number, length)
@parse([
                  FieldSource
                ], "starting delimiter", "ending delimiter", field number, le
ngth)
```

Example extraction using character offset

Data: `PRINT100STD0C`

Command	Result
`@parse(documentName,1,8)`	PRINT100
`@parse(documentName,9,4)`	STD0
`@parse(documentName,13,0)`	C

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To extract using delimiters

1. Select **Delimited List**.
2. In the **Starting delimiter** box, specify the character that marks the beginning of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as \\.
3. In the **Ending delimiter** box, specify the character that marks the end of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as \\. If there is only one delimiter, this field can be left blank.
4. In the **Field number** box, specify the position of the field that will be extracted. (1 refers to the first field, 2 to the second, and so on.)
5. In the **Length** box, specify the length of the string to be extracted. If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.
6. Click **OK**.

The function is inserted into the document property using one of the following formats:

```
@parse([FieldSource], "delimiter", field number, length)
@parse([FieldSource], "starting delimiter", "ending delimiter", field numbe
r, length)
```

Example extraction using delimiters

Example

Data: `CJ,P038,FC=6,F=OCR1,ID=J0006600,ACCOUNT=DC`

Command	Result
`@parse(documentName, \,F=, \,, 1, 0)`	OCR1
`@parse(documentName, \,ACCOUNT=, \,, 1, 0)`	DC
`@parse(documentName, \,P, \,, 1, 10)`	038

How to Configure the @schedule Function

Use this procedure to configure the `@schedule` function. This function inserts the configured schedule into a string or date/time document property. Note, that you are not scheduling a document. You are just configuring a date/time using a schedule. The date/time string will be inserted in the document property you are configuring.

1. Right-click in the appropriate document property and click **Insert Function @schedule**.
   This opens the **Schedule dialog box**.
2. Set the appropriate **Day** option.
3. Set the appropriate **Time** option.

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4. If you are inserting the schedule into a document property with a string type, you must also configure the following:
   a) In the **String format** box, enter the format the date/time string will use when it is inserted into the document property.

      See *Format grids* for descriptions of the available formats.
   b) In the **Culture** box, specify the culture name of the data in the document. The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.
5. Click **OK**.

The function is inserted into the document property using one of the following formats:

For date/time properties: `@scheduleDateTime(daytype,dayvalue,timetype,timevalue,,)`

For string properties: `@scheduleString(daytype,dayvalue,timetype,timevalue,format,culture)`

How to Configure the @stringToDateTime Function

This function converts a string (usually from another document property) to a date/time value

Use this procedure to configure the `@stringToDateTime` function. This function converts a string to a date and time in the format specified. The string could be an extracted variable or another document property. This function inserts the configured date/time into a date/time document property.

1. Right-click in the appropriate document property and click **Insert Function** > **@stringToDateTime**. This opens the **@StringToDateTime** dialog box.
2. In the **FieldSource** box, specify how you want to retrieve the date/time that will be inserted in the document property. You can do this using one of the following methods:

Method	Description
FieldSource	Right-click in the box, click **Insert Document Property**, and select the document property from the list.
Output Variable	Right-click in the box, click **Insert Variables**, and select the output variable from the list. You can also enter the output variable directly in the box. The variable must be surrounded with curly braces {}. The output variables are from an **Advanced Document Modification** rule or an extraction variable from an extract rule (line mode or page mode) or burst rule (line mode or page mode).

3. In the **Format** box, enter the format the date/time string will use when it is inserted into the document property.

   See *Format grids* for descriptions of the available formats.
4. In the **Culture** box, specify the culture name of the data in the document.

   The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.
5. Click **OK**.

The function is inserted into the document property using one of the following formats:

`@stringToDateTime(FieldSource,Format)`

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```
@stringToDateTime(FieldSource,Format,Culture)
@stringToDateTime({OutputVariable},Format)
@stringToDateTime({OutputVariable},Format,Culture)
```

How to Configure the @counter Function

This function specifies the name format for newly created burst documents.

Use this procedure to configure the `@counter` function. This function allows you to specify the name format for newly created burst documents. When you use the `@counter` function, you will get the file name with the counter appended.

The following restrictions apply for the `@counter` function:

- The `@counter` function can be used only when configuring a business rule to burst using page mode.
- The `@counter` function can be entered only in the Document Name property.
- The `@counter` function is meant to be used by itself. It cannot be used in combination with other variables.

Note: You cannot add variable data with a counter appended using the `@counter` function. To do this, perform the following workaround: First, set the variable data in another field. Then, in a follow on rule action, use the `@parse` function combined with the other field to create the document name desired.

1. Right-click in the Document Name property, and then click **Insert Function** > **@counter**.
   This opens the **@Counter** dialog box.
2. Specify the **Counter length**.
3. Specify the **Separator** you want to use.
4. Click **OK**.

The function is inserted into the Document Name property using the following format:

```
@Counter(counter length,separator)
```

Example

If you burst MyDoc into 5 new documents and you specified `@Counter(3,#)` in the Document Name property, the documents would be named as follows:

MyDoc#001
MyDoc#002
MyDoc#003
MyDoc#004
MyDoc#005

Using the Data Conversion Utility

Complete this procedure to convert data formats.

Note: Most users will not have to convert data formats. If you think this conversion is necessary, please contact Nuance Support to ensure the data is converted properly.

To convert data formats, you must create a DCO (Data Conversion Object) chain. DCO chains consist of an input format and an output format. The available output formats vary depending on the input format selected. You can also set specific DCO parameters depending on your needs.

1. Open the **Data Conversion Utility**.

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Open Windows Explorer and navigate to the `C:\Program Files\NSi\Output Manager` folder. Double-click `EomBackupDatabase.exe`.

2. Click **Select Chain**.
   This opens the **Select DCO Chain** dialog box.
3. Select the **Input format** and **Output format** from the drop-down lists, and click **OK**.

   Pairing an input format with an output format creates a chain. This chain is displayed in the **Current chain** box. The DCOs available for each format are displayed in the **Registered DCOs** box. Refer to the *DCO descriptions* table for a description of each DCO.
4. Under **Registered DCOs**, select the DCOs you want to add, and then click **>**.

   This will add the selected DCOs to the **Current chain** box. If necessary, you can import DCOs to appear in the **Registered DCOs** box. Click **Import** and navigate to the appropriate `.dll` file. This file will be copied to the DCO Library folder.
5. To remove DCOs, under **Current chain**, select the DCOs you want to remove, and then click **<**.
6. Click **Move Up** and **Move Down** to modify the processing order.
7. Click **Save As** to save your changes to the chain.
   This opens the **Save As** dialog box.
8. To create a new chain, click **Create new chain** and type an **Output format** name.

   The chain will be saved using the displayed **Input format** and the specified **Output format**. To overwrite the existing chain, click **Replace existing chain**. Click **Save**. If you overwrite an Nuance Output Manager default chain, the default will be modified and all jobs using that chain will be affected. Typically, you will save your changes to a new chain. You can reapply all of the default settings by clicking **Restore Defaults**. Restoring the defaults will not change any new chains you have created.
9. Set DCO parameters as necessary.
   Parameter changes will be saved to the active chain.
10. Verify that you have the appropriate chain open before you modify your parameter settings.
    a) Click **Set Parameters**.
       This opens the **Initialization Parameters** dialog box.
    b) Under **Chain selection**, verify that the appropriate chain is selected. If the chain selection is incorrect, click **Cancel** and select the correct chain.
    c) Click **Add** to add a new parameter, or click **Modify** to modify an existing parameter.
       This opens the **Parameter Settings** dialog box.
    d) Select an existing parameter **Name** from the drop-down list, or type a new name.

       Refer to the *DCO Parameters* table for a description of the parameters and their appropriate values and types.
    e) Enter the parameter **Value**.
    f) Select the parameter **Type** from the drop-down list.

       If you select an existing parameter **Name**, this value will be selected for you.
    g) Click **OK**.
       This will save your parameter settings to the active DCO chain. To save you changes to a new chain, you must open the new chain and then reapply your parameter changes.

DCO Descriptions

Name	Description	Parameters
Afp2PRRDCO	Receives AFP data and wraps it in the PRR format. This process	NONE

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Name	Description	Parameters
	is usually the first step during a conversion of AFP data when using DCOs.	
ASA2PRRDCO	Receives data in ASA carriage control format and converts it to Printer Ready Record format.	DCO_ULONG_CP_CURRENT
ASA2noFFPRRDCO	The ASA2PRRnoFF DCO ignores single form feed characters (0x0C) as record delimiters. With BEPS version 3.0 and later, any form or combination of valid CC is treated as a record delimiter, but this DCO can be used to replicate the processing that BEPS performed prior to version 3.0.	DCO_ULONG_CP_CURRENT
Ascii2DosAsciiDCO	Takes an ASCII file and treats 0x1A as an EOF marker. All data after the 0x1A character is ignored.	NONE
Ascii2PRRDCO	Receives ASCII data and converts it to PRRs. This DCO also handles the 1F format (non-DEC).	DCO_BOOL_ASCII_V_FORMAT DCO_ULONG_CPIN
AsciiDec2PRRDCO	Receives ASCII format data with inline DEC format information. Converts to PRR. Allows multiple in-line 1F commands in a single record.	DCO_ULONG_CPIN DCO_ULONG_CPOUT
Binary2CompressDCO	Accepts binary data and compresses it.	DCO_ULONG_COMPRESS_LEVEL DCO_BOOL_COMPRESS
Binary2CompressPRRDCO	Accepts binary data and compresses it, returning PRR records.	DCO_ULONG_COMPRESS_LEVEL DCO_BOOL_COMPRESS
Binary2EncryptPRRDCO	Accepts binary data it is provided and encrypts it using the cipher key created by the user in the registry. The AES Rijndael cipher protocol is used. The DCO reads the cipher key from the Registry based on the key name provided.	DCO_STRING_KEY_NAME DCO_BOOL_ENCRYPT

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Name	Description	Parameters
Binary2HostDCO	Receives binary data (any data that is not identified as being some other format) and converts it to records in the host format (NJE-wrapped records). This is the standard format for data in the Output Manager Print Server spool.	DCO_ULONG_LRECL
Binary2PRRDCO	Wraps portions of binary data in the PRR record format.	DCO_ULONG_LRECL
BinaryProgramBinaryDCO	Accepts binary data and sends the data to an external program via a named pipe. Data generated by the external program is received via a second named pipe, and outputted to the rest of the DCO chain. Allows external programs to process data, in the same manner as JES exits. Possible uses include normalizing data on input and encryption programs.	DCO_STRING_PROGRAMPATH DCO_STRING_PROGRAMPARAMETERS DCO_STRING_PROGRAMFOLDER DCO_BOOL_PROGRAMHANDLES
CodePage2CodePageDCO	Receives PRRs and converts the data from the given input code page to the given output code page. If the record is determined to be ASA (from the SRCB), the CC byte is converted. The output records are in the PRR record format.	DCO_ULONG_CPIN DCO_ULONG_CPOUT DCO_ULONG_CP_CURRENT (*)
CodePage2UnicodeDCO	Receives PRRs and converts the data from the given input code page to Unicode. The output records are in the PRR record format.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN DCO_UNICODE_DATA (*)
Compress2DecompressDCO	Accepts binary compressed data, and decompresses it. The compressed file needs to be in the gzip (.gz) compression format.	DCO_BOOL_DECOMPRESS
Decrypt2BinaryDCO	Accepts encrypted binary data it is provided and decrypts it using the cipher key created by the user in the registry. The AES Rijndael decipher protocol is used. The DCO reads the	DCO_STRING_KEY_NAME DCO_BOOL_DECRYPT

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Name	Description	Parameters
	decipher key from the Registry based on the key name provided.	
File802DSDCO	Takes records of File80 data wrapped in the PRR record format and converts them to data records in the form specified in the File80 header. The resulting records are delimited by the PRR format.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN DCO_ULONG_CPOUT DCO_BOOL_VALID_FILE80_DATA DCO_FILE80_FILENAME
Fixed2PRRDCO	Takes input records of a fixed length and converts them to Printer Ready Record format. This involves adding the PRR header to the beginning of the record.	DCO_STRING_CCTYPE DCO_ULONG_FIXEDREC
Host2PRRDCO	Converts data in the host format (NJE-wrapped data from theOutput Manager Print Server spool) to Printer Ready Records (PRR). This is usually the first DCO in an output conversion chain.	DCO_ULONG_CPIN
Host2TruncDCO	Provides Blank truncation for Host mode records.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
IBM2PRR	Receives data in the IBM standard record format and produces Printer Ready Records (PRR). The IBM record format consists of a 2 byte length word in little Endian format followed by a carriage control byte and the actual data. This format is also recognized by XEROX EPS printers.	NONE
Interpress2PRRDCO	Reads records in Interpress format and converts them to PRR.	NONE
IRS2HOSTDCO	Converts RJE Punch data to Host (NJE) record format with no carriage control.	DCO_BOOL_MCC_IN_DATA DCO_ULONG_MAX_PRINT_POSITION
LPS2PRRDCO	Read LPS format records and converts them to PRR.	NONE

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Name	Description	Parameters
Machine2P390DCO	Wraps PRR records with an additional PRR header so the records can be sent directly from the SOP to the Output Manager 390 port. This needs to be done because the Output Manager 390 port is expecting PRR wrapped records.	DCO_BOOL_CONDITIONAL_START_PB DCO_BOOL_CONDITIONAL_END_PB DCO_BOOL_PAGE_DIRTY_FLAG DCO_BOOL_BINARY_DATA DCO_BOOL_3800_PRINTER DCO_BOOL_3800_TRC_ENABLED DCO_ULONG_SEND_FCB DCO_STRING_FCB DCO_BOOL_PAGE_DIRTY_FLAG (*)
Mixed2ASADCO	Receives Printer Ready Records and converts them into Printer Ready Records with ASA carriage control. The input records can have machine, ASA, or no carriage control.	DCO_BOOL_MARK_INSERTED_RECS DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
Mixed2MachineDCO	Receives Printer Ready Records and converts them into Printer Ready Records with machine carriage control. The input records can have machine, ASA, or no carriage control.	DCO_BOOL_MARK_INSERTED_RECS DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
Mixed2NoCCDCO	Removes carriage control from PRR Records. Records which are only carriage control are deleted.	NONE
PRR25ATruncateDCO	Truncates trailing blanks from records with and without 5A carriage control. If the record does not contain a 5A carriage control, all trailing blanks are truncated on the record. If the record does contain a 5A carriage control, trailing blanks are truncated up to the length specified in the 5A record. The length bytes in the 5A record are the 2 bytes immediately following the 5A byte. The Printer Ready Record length bytes will be adjusted in accordance with the truncation performed.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN

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Name	Description	Parameters
PRR2AddDelimDCO	Add the specified delimiter to PRR record.	DCO_STRING_FIXREC_DELIM
PRR2AsciiDCO	Converts data to PRR wrapped ASCII records with ASCII carriage control. FCB is used to insert page breaks when the number of lines per page is exceeded. If pagination is disabled then page breaks are not inserted based on the FCB. Conditional page breaks are also inserted at the beginning and end of the data based on the page dirty flag and conditional page break settings. If the output is optimized then a FF (0x0C) will be used to get to top of form when a page break is inserted. Otherwise the required number of CR LFs (0x0D0A) will be used.	DCO_STRING_FCB DCO_BOOL_PAGINATE DCO_BOOL_OPTIMIZE DCO_BOOL_CONDITIONAL_START_PB DCO_BOOL_CONDITIONAL_END_PB DCO_BOOL_PAGE_DIRTY_FLAG DCO_BOOL_PAGE_DIRTY_FLAG (*)
PRR2AsciiAsaDCO	Returns PRR wrapped ASA records with CRLF delimiters. Source data must be all ASA.	NONE
PRR2AsciiRecordDCO	Returns PRR wrapped ASCII data with CRLF delimiters. All ASA and Machine carriage control is stripped.	NONE
PRR2BinSearchReplaceDCO	Searches for all occurrences of either text or binary data in a data stream and replaces those occurrences with a replacement string or replacement binary data. The data must be delimited by the Printer Ready Record (PRR) format.	DCO_BOOL_SEARCH_STRING_MODEn DCO_STRING_SEARCHn DCO_STRING_REPLACEn DCO_BOOL_REMOVE_RECORDn
PRR2CDPXFRMDCO	DCO Interfaces with CDP transformation package. It returns binary data wrapped with PRR headers.	DCO_STRING_PAGE_RANGE DCO_STRING_INPUT_FORMAT DCO_STRING_OUTPUT_FORMAT DCO_STRING_CONFIG_FILE
PRR2CondPageBreakDCO	Inserts a page break at the beginning and/or end of the data set based on the configuration options. The carriage control type of the first	DCO_BOOL_CONDITIONAL_START_PB DCO_BOOL_CONDITIONAL_END_PB DCO_BOOL_PAGE_DIRTY_FLAG

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Name	Description	Parameters
	record (Machine or ASA) determines the type of page break inserted.	
PRR2ExpandDCO	Receives Printer Ready Records and expands them so that the logical and physical record lengths match. The expansion is done with spaces. The output records are in the PRR record format.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
PRR2ExpandTabsDCO	Receives text data and converts tab characters to zero or more expansion character. The default behavior of this DCO is to search for ASCII horizontal tabs (0x09) and replace them with 8 ASCII space characters (0x20). The tab character to replace, as well as, the number and type of the replacement character is configurable.	DCO_ULONG_TAB_SIZE DCO_ULONG_SPACE_CHAR DCO_ULONG_TAB_CHAR
PRR2File80DCO	Translates data delimited by the PRR record format to File80 data wrapped in the PRR format. During the translation, there is a one-to-one correspondence between PRR records and File80 records.	DCO_STRING_FILE80_RECFM DCO_ULONG_LRECL DCO_STRING_FILE80_FILENAME
PRR2File80PrepDCO	Prepares data that is about to be sent into the File802DS DCO. It removes any carriage control in the data, and truncates records longer than 80 bytes. The data records are received with a PRR header, and the records retain the PRR header when they are sent.	NONE
PRR2FixedLengthDCO	Pad or truncate PRR record to the specified length.	DCO_ULONG_FIXREC_LENGTH DCO_ULONG_CP_CURRENT
PRR2HostDCO	Receives PRR formatted records and converts them to the NJE format. This includes spanning, if necessary. The input of this DCO shall be data that is wrapped in PRR records and the output will be that same data wrapped in NJE (host) records.	NONE

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Name	Description	Parameters
PRR2InlineXeroxResourcesDCO	Used by NSi/TOOLS and NSi/TRANSFORM, to handle extraction and re-insertion of inline Xerox resources (fonts, images, forms, logos).	DCO_STRING_IDEN DCO_STRING_RSTACK DCO_STRING_DJDESEARCH DCO_STRING_DJDEREPLACE DCO_BOOL_REPLACEBLANKFONTINDEX
PRR2InsertLineFeedDCO	Replaces all instances of ASCII CC 0x0D0C (CR FF) with 0x0D0A0C (CR LF FF).	NONE
PRR2MergeOverprintsDCO	Searches for line data that has machine carriage control skip immediate (0x03) or print and skip immediate (0x01). When this is found, that line is stored and the following line in the stream is examined. A character-by-character comparison is done for the two lines. The character from the first line is used in all cases except when the character in the first line is a space character and when the character in the first line is an underscore ("_") and the character in the second line is NOT a space. Because the CC must be machine, this DCO should be used after the Mixed2Machine DCO in the DCO chain. This will make sure the search works properly.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
PRR2nRECORDSDCO	Combines n PRR records into a single record. It is primarily used for customers upgrading from the DOS product who used the receive mode n ASCII lines.	DCO_ULONG_N_RECORDS
PRR2PadDCO	Receives Printer Ready Records and pads them if padding is turned on. The padding includes both the pad skip to channel 1 and pad record options offered in Output Manager Print Server. The output records are in the PRR record format.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN DCO_STRING_PADSKIP1 DCO_STRING_PADRECORD

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Name	Description	Parameters
PRR2ProcessTBVDCO	Implements the TBV receive option for files received via Nuance/Tran. The input data is converted to the NSi S/370 format and wrapped in a PRR header. The resultant file is similar to that generated by the DOS product.	DCO_ULONG_CP_CURRENT (*) DCO_ULONG_CPIN
PRR2RawDCO	Receives Printer Ready Records and strips the 5 byte PRR header from them.	NONE
PRR2S370DCO	Receives Printer Ready Records and outputs them in the NSi S/370 format. Usually this DCO is last in a DCO chain. The NSi S/370 format has a double byte record length (little Endian) at the start and end of each record. The NSi S/370 format records have Machine Carriage Control.	NONE
PRR2SCSDCO	Converts a PRR data stream to a PRR wrapped SCS data stream.	DCO_BOOL_TRANSPARENCY DCO_MAX_REC_LENGTH
PRR2SearchReplaceDCO	Searches for all occurrences of either text or binary data in a data stream and replaces those occurrences with a replacement string or replacement binary data. The data must be delimited by the Printer Ready Record (PRR) format.	DCO_BOOL_SEARCH_STRING_MODEn DCO_STRING_SEARCHn DCO_STRING_REPLACEn DCO_BOOL_REMOVE_RECORDn
PRR2SetFCBDCO	Determines the FCB used by DCOs for pagination later in the chain. When the DCO is done with the data, the first record will contain the FCB to be used.	DCO_STRING_FCB DCO_STRING_RETURN_LAST_FCB DCO_BOOL_OVERRIDE_FCB DCO_ULONG_SEND_FCB DCO_STRING_RETURN_LAST_FCB (*)
PRR2SpurDCO	Carriage control Conversion DCO. Converts every data record to a write without spacing and follows this with the appropriate space immediate command. For compatibility with	NONE

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Name	Description	Parameters
	customers who had modified their data streams or printers to use SPUR boxes which generated carriage control like this.	
PRR2StripCharsDCO	Receives data and removes any character that is specified during initialization. The default behavior of this DCO is to search for NULLs (0x00) and remove them. The character to remove is configurable.	DCO_ULONG_STRIPCHAR
PRR2StripLeadPageBreaksDCO	Removes all leading page breaks from a stream of data. The DCO receives data in the Printer Ready Record format. The data is assumed to be in Machine format, so this translates to all leading records with 0x8B carriage control being stripped. The output records are in the PRR record format.	NONE
PRR2StripNonPrintMCCDCO	Strips any record which does not contain a Machine Carriage Control (MCC) Print Carriage command (for example, FCB 0x63) from the data stream.	DCO_ULONG_CP_CURRENT DCO_BOOL_STRIP_S370_CC DCO_BOOL_STRIP_NOOP DCO_BOOL_STRIP_LOAD_FCB
PRR2StripUCSDCO	Accepts PRR records as input and searches for removes UCS buffers. These buffers are identified by the channel commands 0xF3 or 0xFB. Records that are not UCS buffers are not modified. The output records are in the PRR record format.	NONE
PRR2StripXeroxDCO	Strips DJDE records that begin with $$XEROX. This is a custom DCO created for a specific customer with sample data. In all cases the $ $XEROX occurred after the CC and first byte of data, so that is where the DCO searches for the text. The DCO also removes page breaks associated with these records, if the record was on a page of its own and its removal would cause a blank page to be left.	DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN

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Name	Description	Parameters
PRR2SysinDCO	Given data in the PRR form, it removes the carriage control and creates fixed length or variable length card records.	DCO_ULONG_LRECL DCO_BOOL_ASCII_V_FORMAT
PRR2TransformDCO	Interfaces with the ITransformDCOStream COM interface. For use with 3rd party transformation packages.	DCO_STRING_CONFIG_FILE DCO_STRING_PAGE_RANGE DCO_STRING_INPUT_FORMAT DCO_STRING_OUTPUT_FORMAT
PRR2TruncateDCO	Receives Printer Ready Records and truncates trailing spaces if truncation is turned on. Truncation will continue as long as spaces are encountered until there is only 1 byte remaining. The output records are in the PRR record format.	DCO_STRING_TRUNCATE DCO_ULONG_CP_CURRENT DCO_ULONG_CPIN
PRR2VBMDCO	Converts PRR records to PRR wrapped VBM records. Both RDW (Record Descriptor Words) and BDWRDW are supported. Block lengths are added to each record if configured to do so.	DCO_BOOL_VBMBLOCKLEN
PRR2vRECORDSDCO	Combines a variable number of PRR records into a single record. The vertical bar | is used as the delimiter between records. Any data following | in a PRR record is discarded.	DCO_ULONG_V_RECORDS_CHAR DCO_ULONG_CP_CURRENT
PRR2XSGFDCO	Creates XSGF or EPS records. Leaves them wrapped in PRR so that this can be used with existing SOP.	NONE
PRRCompress2Decompress	Accepts compressed data in PRR format, and decompress it into PRR format.	DCO_BOOL_DECOMPRESS
S3702PRRDCO	Receives data in the NSi S/370 format and writes it out in the PRR format.	NONE
SCB2SCSDCO	Converts a SCB data stream to a SCS data stream. The data stream is decompressed if SCB compression	DCO_BOOL_COMPACT DCO_STRING_COMPACT_TABLE

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Name	Description	Parameters
	is used and decompacted if a compaction table is used.	
SCS2HostDCO	Converts a SCS data stream to a PRR data stream.	DCO_BOOL_FCBLOAD DCO_BOOL_MCC_IN_DATA DCO_ULONG_MAX_PRINT_POSITION DCO_BOOL_BINARY_DATA DCO_BOOL_POWER_HOST
SCS2SCBDCO	Converts a PRR wrapped SCS data stream to a PRR wrapped SCB data stream.	NONE
VarableRecord2PRRDCO	Breaks an incoming stream into a series of records with a specified type of carriage control and a specified Record terminator.	DCO_BOOL_DATA_IS_HEX DCO_BOOL_SWITCH_CODE_PAGE DCO_STRING_RECORD_TERMINATOR DCO_INT_TERM_CODEPAGE DCO_INT_CC_TYPE_FIXED DCO_BOOL_SECOND_BYTE_DELIMITER
VBM2PRRDCO	Converts VBM records into PRR records. Allows for both blocked and unblocked.	NONE
VM2PRRDCO	Converts VM into PRR.	NONE
XpafTrn2BinaryDCO	Strips off SCS transparency command and returns binary data.	NONE

DCO Parameters

Name	Description	Value	Type
DCO_BOOL_COMPACT	Enables or disables data co mpaction	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_DATA_IS_ HEX	If the Boolean is true, the d elimiter is hex; otherwise t he delimiter is text.	True, T, Yes, Y All other characters are false	Boolean

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Name	Description	Value	Type
DCO_BOOL_FCBLOAD	Specifies whether or not to look for an FCBLOAD co mmand	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_MARK_INS ERTED_RECS	Specifies if the records the DCO inserts are marked	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_MCC_IN_D ATA	Specifies if machine carria ge control is embedded in t he data	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_PROGRAM HANDLES	Specifies if the input strea m is set to STDIN and outp ut stream is set to STDOU T	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_REMOVE_ RECORDn	Allows the removal of a re cord that matches the searc h criteria	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_REPLACEB LANKFONTINDEX	Replaces blank font indexe s with the last known good one	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_SEARCH_S TRING_MODEn	Specifies if the search mod e is binary or text. If the Bo olean is true, the search mo de is text; otherwise the sea rch mode is binary.	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_SECOND_B YTE_DELIMITER	If true, the delimiter is a 2-byte hex value; otherwise, a single-byte hex value is u sed.	True, T, Yes, Y All other characters are false	Boolean
DCO_BOOL_SWITCH_C ODE_PAGE	If true, the text delimiter w ill be translated into a conf igured code page; otherwis e, the system code page wi ll be used.	True, T, Yes, Y All other characters are false	Boolean
DCO_INT_CC_TYPE_FI XED	Specifies the type of carria ge control.	0 = ASCII ASA; 1 = EBC DIC ASA; 2 = Machine; 3 = NONE	Integer

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Name	Description	Value	Type
DCO_INT_TERM_CODE PAGE	Specifies the code page th e delimiter will be translat ed to.	Any positive number that is a valid code page (for exam ple, 37 or 437)	Integer
DCO_STRING_CCTYPE	Specifies the record's carria ge control type	"A" for ASA carriage contr ol, "M" for machine carriag e control, and "N" if there i s no carriage control. If not hing is specified, the defaul t value is "A"	String
DCO_STRING_DJDEREP LACE	Specifies the IDEN string i n the normalized file	IDEN string in the normali zed file	String
DCO_STRING_DJDESEA RCH	Specifies the IDEN string i n the original LCDS file	IDEN string in the original LCDS file	String
DCO_STRING_FILE80_F ILENAME	Specifies the original file n ame	Filename	String
DCO_STRING_FILE80_R ECFM	Specifies the record format	Record format	String
DCO_STRING_IDEN	Specifies the hex values for the Xerox IDEN string	Hex values for the Xerox I DEN string	String
DCO_STRING_PADREC ORD	Enables or disables pad rec ord	Y or N	String
DCO_STRING_PADSKIP 1	Enables or disables pad-ski p to channel 1	Y or N	String
DCO_STRING_PROGRA MFOLDER	Specifies the external progr ams default directory	Path to the current director y (default folder)	String
DCO_STRING_PROGRA MPARAMETERS	Specifies parameters for ex ternal program	"STDIN" is replaced with t he input pipe name, and "S TDOUT" is replaced with t he output pipe name	String
DCO_STRING_PROGRA MPATH	Specifies the full path to th e executable	Path to the executable incl uding the executable file n ame	String
DCO_STRING_RECORD _TERMINATOR	Specifies the string used as the delimiter.	String are as is, but hex, an d follow the formation “X X XX” for double byte or “ XX” for single byte.	String
DCO_STRING_REPLAC En	Replacement string. The length of characters or bytes must be in the range (0 256).	Replacement text for the te xt search mode and 0x0304 05 for the binary search mo de. In the binary mode, eac h two characters after the 0	String

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Name	Description	Value	Type
	The n represents the search-replacement pair.	x represent a byte of data u sed as a replacement.	
DCO_STRING_RSTACK	Species the hex values for the printers RSTACK com mand.	Hex values for the printers RSTACK command	String
DCO_STRING_SEARCH n	Search string. The length of characters or bytes must be in the range (1 256). The n represents the search-replacement pair.	Search text for the text sea rch mode and 0x010203 fo r the binary search mode. I n the binary mode, each tw o characters after the 0x re present a byte of data to se arch for	String
DCO_STRING_TRUNCA TE	Enables or disables truncat ion	Y or N	String
DCO_ULONG_CPIN	Input code page	Input code page number, fo r example 37	ULong
DCO_ULONG_CPOUT	Output code page	Output code page number, for example 437	ULong
DCO_ULONG_FIXEDRE C	Specifies the length of each record in the file in bytes	1 32000 The default value is 133.	ULong
DCO_ULONG_LRECL	Specifies the record length in bytes	1 32767	ULong
DCO_ULONG_SPACE_C HAR	Character to use when expa nding tabs	Number, for example 20 (A SCII space)	ULong
DCO_ULONG_STRIPCH AR	Character to remove when stripping characters	Number, for example 0 (str ip NULL characters)	ULong
DCO_ULONG_TAB_CH AR	Character to look for (tab c haracter)	Number, for example 9 (A SCII tab character)	ULong
DCO_ULONG_TAB_SIZ E	Number of spaces used for tab expansion	Number, for example 8	ULong
RJE_BOOL_SCB_COMP RESSION	Specifies if the data will be SCB compressed	True, T, Yes, Y All other characters are false	Boolean

Scheduling Tasks

Administrators can configure a recurring schedule for a task. Tasks can be created to run an ad hoc rule, create and save a report, or create and email a report.

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Complete the steps in the following procedure to create a schedule.

- *Create a Schedule*

How to Create a Schedule

Complete the steps in this procedure to create a schedule.

1. From the Output Manager Console menu bar select **Tools** > **Schedule Manager**.
   This opens the **Schedule Manager** dialog box.
2. Click **Add** to create a schedule.
   This opens the **New Schedule** dialog box.
3. Enter a schedule **Name** and **Description**.
4. Use the **Enabled** check box to enable or disable the schedule.
5. From the **Schedule** tab, click **Add**.
   This adds a new schedule in the **Summary** box.
6. Under **Recurrence pattern**, choose if you want to create a **Simple**, **Daily**, or **Monthly** recurrence pattern.

   Notice the recurrence options change based on the type of pattern you want to create. Configure these options as necessary.
7. Under **Range of recurrence**, determine the **Start** and **End** date/time for the schedule.

   By default the schedule is configured with no end date. To configure an end date, select the **End by** check box and select the appropriate date and time in list boxes.
8. When the schedule is complete, click **Save Edit** to save the schedule.

   Note: To add multiple schedules, click **Add** and configure the schedules as necessary.
9. From the **Tasks** tab, you can create multiple tasks for the schedule.
10. Use the following procedures to configure tasks as necessary.
    - *Run an Ad Hoc Rule*
    - *Create and Save/Email a Report*
    - *How to Update Output History with Page Counts* on page 326
    - *How to Import Users and Groups* on page 326
    - *How to Synchronize Active Directories* on page 327
    - *How to Synchronize LDAP* on page 327
11. Use the buttons below the task grid to add additional tasks to the schedule, modify existing tasks, or remove tasks from the schedule.
12. When your schedule is complete, click **OK**. The schedule summary and tasks are listed on the **Schedule Manager** dialog box. Use the check box in the Enabled column to determine if the schedule is enabled or disabled.
13. Click **OK**.

How to Run an Ad Hoc Rule

Perform this topic to use a schedule to run an ad hoc rule.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add** > **Perform Rule**.
   This opens the **New Task** dialog box.
2. Enter a **Name** and **Description** for the task.
3. In the **Choose the rule to perform** list, select an existing ad hoc rule.

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To create a rule, click the browse button (**...**) and create a rule from the **Ad Hoc Rules Manager** dialog box. See *Working with ad hoc rules* for instructions on creating rules.

4. In the **Run mode** list, choose if you want to run the rule against all documents in the spool or against all newly received documents since the last time the rule was run.
   The rule will not be run against retained documents.
5. Once the task is selected, click **OK**.

The new task is listed in the grid on the **Tasks** tab.

How to Create and Save/Email a Report

Perform this procedure to use a schedule to create a report and then save or email it.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add Create Report**.
2. Enter a **Name** and **Description** for the task.
3. To save the report, select **Save report as a** and choose to save the report in PDF or comma separated values (CSV) format.

   In the box, either type the folder path where the report will be saved, or click the browse button (**...**) to select the folder. If the Nuance Output Manager Database Manager is on a different machine, you must enter the full UNC path.
4. To email the report, click **Email report as a** and choose to email the report in PDF or CSV format.
5. Either select an email profile from the list, or click the browse button (**...**) to create one from the **Manage Outbound Email Profiles** dialog box.
6. Configure the email messages that will be sent using the following options:
   - Set the **Priority** level of the email as normal, low, or high.
   - Enter the email addresses that will be sent messages in the **To**, **CC**, and **Bcc** boxes. You can enter multiple email addresses separated by a comma.
   - In the **Reply to** box, enter an email address where replies will be routed. You can enter multiple email addresses separated by a comma.
7. In the **Report to generate** list, select the report you want to create.
8. Under **Report parameters**, configure the parameters for the selected report.

   The parameters change depending on the report selected.
9. Once the task is selected, click **OK**.
   The new task is listed in the grid on the **Tasks** tab.

How to Update Output History with Page Counts

Perform this procedure to use a schedule to count document pages as they are received by Nuance Output Manager sources. The schedule allows you to batch process page counting during periods of low incoming volume, such as overnight.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add Update Output History With Page Counts**.
2. Enter a **Name** and **Description** for the task.

How to Import Users and Groups

Perform this procedure to use a schedule to import users and groups into Nuance Output Manager. The schedule ensures that Nuance Output Manager is synchronized with new, removed, and modified Active Directory and LDAP users.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add Import Users and Groups**.

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2. Click **User Import Wizard**.
3. Use the **User and Group Import and Synchronization Wizard** to configure the import settings.
   Import users and groups to Output Manager on page 43 provides more information on using the wizard.

How to Synchronize Active Directories

Perform this procedure to use a schedule to synchronize Nuance Output Manager Active Directory users with their respective domain controllers.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add Active Directory Synchronization**.
2. Enter a **Name** and **Description** for the task.

How to Synchronize LDAP

Perform this procedure to use a schedule to synchronize Nuance Output Manager LDAP users with their respective LDAP server.

1. On the **Tasks** tab of the **Schedule Manager**, click **Add LDAP Synchronization**.
2. Enter a **Name** and **Description** for the task.

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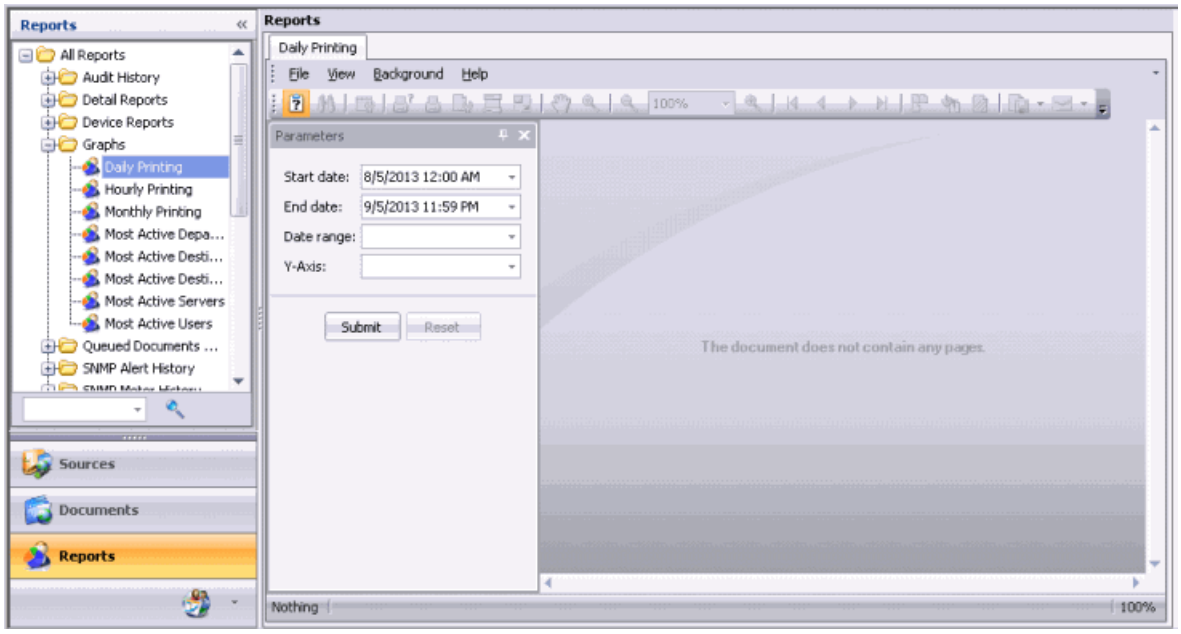
Reports

Learning About the Reports Application

The Reporting application can be accessed both through the Output Manager Console and the Nuance Output Manager Web Interface. There are many sample reports included in Nuance Output Manager. These reports provide summary and details of activity by user, department, document, and destination. Upon clicking reports in the tree, a panel displays with parameters. These parameters can be adjusted, after which the report displays up in the right side of the screen. Summary reports include hyperlinks to detailed reports. The **Report Designer** is used to edit and create new reports. It is accessed from the **New Report** menu.

Click the area of the window you want to learn more about.



1. *Navigation pane* on page 328
2. *Report Preview window* on page 329
3. *Menu bar* on page 329
4. *Toolbar* on page 330
5. *Status bar* on page 332
6. *Parameters pane* on page 332
7. *Reports Preview window* on page 332

Navigation pane

Reports are organized in folders. These folders define the permissions for users and groups to access reports. When you right-click an item in the navigation pane, the following options will display. The options listed will vary depending on if a report or report folder is selected.

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Navigation Pane Option	Description
Open (reports only)	Opens the report in the active tab.
Open in New Tab (reports only)	Opens the report in a new tab.
New Folder (report folders only)	Creates a new report folder in the selected folder. A new folder entry titled “UnNamed” will appear in the tree. Ty pe the new folder name and press Enter to create the fold er. By default the new folder will inherit the security sett ings of its parent folder.
New Report (report folders only)	Creates a new report in the selected folder. This option di splays the **New Report** dialog box.
Rename	Renames the selected folder or report.
Copy (reports only)	Creates a copy of the selected report.
Edit (reports only)	Edits the selected report in the **Report Designer**.
Delete	Deletes the selected folder or report. Folders cannot be d eleted if they contain reports or subfolders.
Security	Opens the **Security Configuration** dialog box so that yo u can update the security settings. This option will define the type of access that users and groups have to the eithe r the selected report or the reports contained in the select ed folder.

Report Preview window

The Report Preview window displays a tabbed view of the Reports tree selection. By default, selecting reports in the tree will replace the report in the active tab. To open a report in new tab, right-click the report and click **Open in New Tab**.

When a report is opened the *Parameters pane* displays with parameters to configure. Complete the parameters and click **Submit** to display the report in the right side of the window. Summary reports include hyperlinks to detailed reports.

Your tree selection and open tab pages will be saved for the next time you open the application.

Menu bar

The menu bar displays below the tab title.

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Menu	Command	Description
File	**Page Setup**	Allows you to change page orientation, select paper size, choose paper source, and change page margins.
	Print	Displays the **Print** dialog box for printing the active report.
	Quick Print	Sends the report directly to the default printer without customizing print settings.
	Export Document	Exports the active report and saves the resulting file on your hard drive. You can choose one of the following formats: PDF, HTML, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.
	Send via Email	Sends the active report via email. You can choose one of the following formats: PDF, MHT, RTF, Excel, CSV, text, or image. You may be prompted to define format-specific options.
View	**Page Layout**	Changes the page layout to one of the following: • **Facing** — Arranges the pages side by side, displaying only one or two pages at a time. • **Continuous** — Arranges the pages in a continuous vertical column.
	Toolbar	Shows or hides the toolbar.
	Status Bar	Arranges the pages in a continuous vertical column.
	Customize	Allows for customizing the Report Preview window.
Background	**Color**	Changes the background of the report to a specified color.
	Watermark	Adds a text or picture watermark as the background of the report.

Toolbar

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The toolbar displays the following information.

Option	Description
Parameters	Shows or hides the *Parameters pane*.
Search	Displays the **Find** dialog box for locating text in the rep ort.
Print	Displays the **Print** dialog box for printing the active rep ort.
Quick Print	Sends the report directly to the default printer without cu stomizing print settings.
Page Setup	Allows you to change the print settings using the **Page Setup** dialog box. You can change page orientation, sele ct paper size, choose paper source, and change page mar gins.
Scale	Displays scaling options for changing the view of the re port.
Hand Tool	Enables or disables the use of the Hand tool. The Hand t ool enables you to scroll content by dragging the docume nt instead of using scroll bars.
Magnifier	Enables or disables the use of the Magnifier. The Magnif ier allows you to switch between 100% and "fit whole pa ge" views. Click anywhere in the report to toggle views.
Zoom Out	Decreases the magnification of the report.
Zoom	Allows for selecting the zoom level from the drop-down list.
Zoom In	Increases magnification of the report.
First Page	Displays the first page of the report.
Previous Page	Displays the previous page of the report.
Next Page	Displays the next page of the report.
Last Page	Displays the last page of the report.
Multiple Pages	Displays options for viewing two or more pages at one t ime.
Color	Changes the background of the report to a specified colo r.
Watermark	Adds a text or picture watermark as the background of th e report.
Export Document	Exports the active report and saves the resulting file on y our hard drive. You can choose one of the following for mats: PDF, HTML, MHT, RTF, Excel, CSV, text, or im

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Option	Description
	age. You may be prompted to define format-specific opt ions.
Send via Email	Sends the active report via email. You can choose one of the following formats: PDF, MHT, RTF, Excel, CSV, te xt, or image. You may be prompted to define format-spe cific options.

Parameters pane

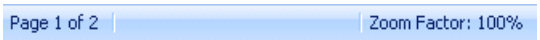
The **Parameters** pane allows you to control the data that displays in the report by changing the parameter values. The following parameters display for all reports. Additional parameters may display depending on the report selected.

Option	Description
Start date	Specifies the start date of the report.
End date	Specifies the end date of the report.
Date range	Specifies a date range for the report. You can choose the last 7 days, the last 14 days, the previous month, month to date, or year to date.
Reset	Clicking this button resets the parameters to their defaul t values.
Submit	Clicking this button submits the parameter values and di splays the report.

Reports Preview window

The **Report Preview** window displays a tabbed view of the **Reports** tree selection. By default, selecting a report in the tree will replace the report that is displayed on the active tab.

Status bar



The status bar displays the following information.

Option	Description
Page *n* of *n*	Displays the current page and the total number of pages i n the report.
Zoom Factor	Displays the current zoom level of the report.

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Working with Reports

From the Output Manager Console, you can access the Reports application where you can view and manage Nuance Output Manager reports. Several sample reports are included in Nuance Output Manager. These reports provide summary and details of activity by user, department, document, and destination.

Nuance Output Manager has green reports that show documents that have been automatically deleted from the server after being spooled but not printed. The green reports provide summary and detailed reports for billing accounts, departments, and users.

If you generate reports from base reports in the Reports application, Nuance Output Manager allows you to export the reports. If you export a summary report, Nuance Output Manager allows you to export a linked detail report. You can import reports into base report folders or into custom folders created by other Nuance Output Manager users.

To enable green reports:

1. In the **Administration** application, select **Set General Preferences** and select the **General** tab.
2. Select **Auto delete Spooled documents** and set the auto-deletion time.

As a best practice for tracking estimated cost savings with green reports, select the **Detect color** and **Count pages** options and specify **Set cost per page** values when configuring the settings on the source **More settings** tab.

Nuance Output Manager enables you to send reporting data from multiple Nuance Output Manager instances to a remote consolidated database. You configure a task for each instance that sends reporting data to the remote database.

- *Manage report folders*
- *Create reports*
- *Modify reports*
- *Remove reports*
- *Move reports*
- *Rename reports*
- *Copy reports*
- *How to Export Reports* on page 335
- *How to Import Reports* on page 336
- *Search for reports*
- *Configure security for reports*
- *How to Send Report Data to a Remote Database* on page 338

How to Manage Report Folders

This topic describes how to manage report folders.

In the Reports application, reports are organized in folders. These folders define the permissions that users and groups have over reports

- *Create folders*
- *Move folders*
- *Rename folders*
- *Delete folders*
- *Search for folders*

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To create folders

1. In the Reports tree, right-click a folder and click **New Folder**.
   A new folder titled **UnNamed** is added to the selected folder.
2. In the edit field, type the name of the new folder and press Enter.
   The new folder automatically inherits the permissions of the parent folder.

To move folders

1. In the Reports tree, select the folder you want to move.
2. Click and drag the selected folder to the desired tree location.
   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the folder will be placed.

To rename folders

1. In the **Reports** tree, right-click the folder you want to rename.
2. Click **Rename** on the shortcut menu.
3. In the edit field, type the new folder name and press Enter.
   To cancel the rename, press Esc.

To delete folders

All of the objects must be removed from a folder before you can delete it.

1. In the **Reports** tree, right-click the folder you want to delete.
2. Click **Delete** on the shortcut menu.

To search for folders

1. In the search box below the **Reports** tree, type the text you want to find and press Enter or click the Search image. Nuance Output Manager will start at the top of the tree and search for the text. Each time the text is found the selected item will be highlighted in the tree.
2. If more than one search result is found, click the next and previous arrow buttons that appear in the search panel.

How to Create Reports

Complete the following steps to create reports in the Reports application.

1. In the **Reports** tree, select the report folder where you want to add a report. Right-click and click **New Report**.
   This opens the **New Report** dialog box.
2. In the list, select a report template.
   You can choose from summary and detailed reports.
3. Enter a name for the report.
4. If you chose to create a summary report, select the detailed report in the drop-down list.
5. Click **OK**.
   This opens the **Report Designer** window.
6. Configure the report as necessary and save your changes.
7. Close the **Report Designer**.

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How to Modify Reports

Complete the following steps to modify reports in the Reports application.

1. From the **Reports** tree, right-click the report you want to modify, and click **Edit**.
   This displays the report in the **Report Designer**.
2. Configure the report as necessary and save your changes.
3. Close the Report Designer.

How to Remove Reports

Complete the following steps to remove reports from the Reports application.

1. In the **Reports** tree, right-click the report you want to delete.
2. Click **Delete** on the shortcut menu.

How to Move Reports

Complete the following steps to move a report in the Reports application.

Reports can be organized into report folders. Once folders are created, reports and folders can be easily moved in the tree as necessary.

1. In the **Reports** tree, select the report or report folder you want to move.
2. Click and drag the item to the desired tree location.
   As you drag the item a yellow arrow will appear to the left of the tree to indicate where the item will be placed.

How to Rename Reports

Complete the following steps to rename a report in the Reports application.

1. In the **Reports** tree, right-click a report and click **Rename**.
2. In the edit field, type the new report name and press Enter.
   To cancel the rename, press Esc.

How to Copy Reports

Complete the following steps to copy a report in the Reports application.

1. In the **Reports** tree, right-click a report and click **Copy**.
   This creates a copy of the report in the same report folder.
2. Optional: If necessary, you can rename the new copy of the report.
   For more information, see *Rename Reports*.

How to Export Reports

Complete the following steps to export a report from the Reports application.

Nuance Output Manager allows you to export reports that you generate from the base reports in the Reports application. You cannot export the base reports.

1. In the **Reports** tree, select reports you want to export.
   - Press the Shift key and click a report to extend the selection.
   - Press the Ctrl key to click a report to add it to the selection.
2. Right-click and select **Export Report(s)**.

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3. Select the folder where you want to export the reports.
4. If you are exporting a summary report, indicate if you want to include the linked detail report.
5. Click **Ok**.

Nuance Output Manager exports the reports with a `nrepx` file extension.

How to Import Reports

Complete the following steps to import reports into a folder in the Reports application.

1. In the **Reports** tree, select the folder where you want to import the reports.
2. Right-click and select **Import Report(s)**.
3. Select the folder that contains the reports to be imported, then click **Search**.
4. To import the reports into the base folders from where they were exported, select **Import into original group**.

   If the reports were exported from a custom folder created by another user, select the custom folder from **Importing into group**.
5. Select the reports in the grid, then click **Import**.

How to Search for Reports

Complete the following steps from the search panel below the **Reports** tree.

1. In the search box, type the text you want to find and press Enter or click the Search image.
   Nuance Output Manager will start at the top of the tree and search for the text. Each time the text is found the selected item will be highlighted in the tree.
2. If more than one search result is found, click the next and previous arrow buttons that appear in the search panel.

How to Configure Security for Reports

Complete this procedure to assign report permissions.

To perform this procedure, you must be a member of the local Administrators group. Users with administrator permission can add and remove users or groups and modify the assigned permissions.

Nuance Output Manager security for the Reports application begins at the root of the **Reports** tree, in the All Reports group. The **Reports** tree consists of folders which are used to organize reports. Nuance Output Manager security is provided by adding a Microsoft Windows user or user group to the folder and assigning permissions to that user or user group. These Nuance Output Manager permissions define the type of access users and user groups have to the reports within the folders. Once the Nuance Output Manager security (Microsoft Windows users, user groups, and document permissions) is set in a folder, the Nuance Output Manager security is inherited by all the objects in that folder. When a new report is added or a folder is created, its security is automatically the same as its parent folder's security (that is, the new report inherits its security from its parent folder).

Tip: To begin configuring report security, start by assigning the desired report permissions in the All Reports folder.

1. In the Output Manager Console, select the Reports application in the navigation pane.
2. In the **Reports** tree, right-click the folder you want to configure and click **Security**.
   This opens the **Security Configuration** dialog box.

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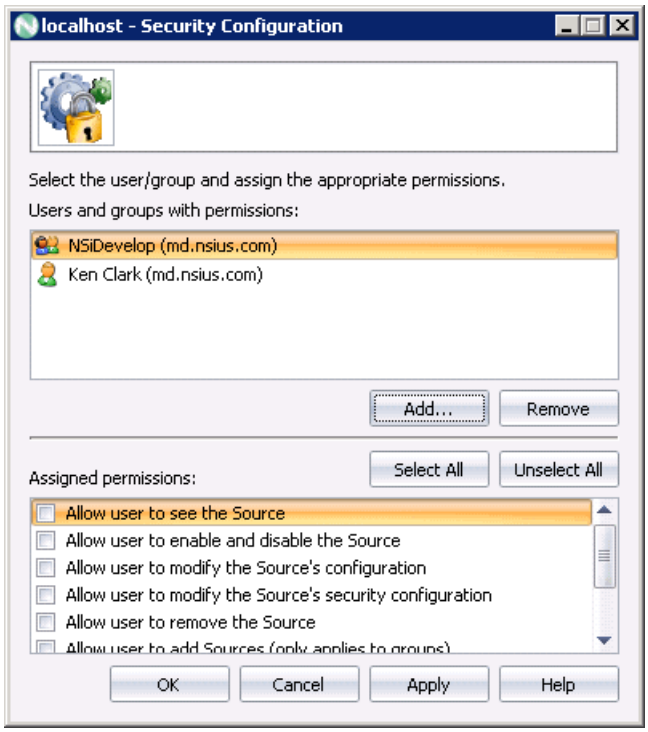

3. Use the **Inherit permissions from the parent** option to determine if you want to inherit permissions from the parent folder or remove inheritance. Click the browse button (**...**) to configure inheritance.

   By default, folders are configured to inherit permissions from the parent folder.

   Tip: It is good practice to assign rights using inheritance, as it allows administrators to easily assign and manage permissions. Blocking inheritance is useful when reports need to be seen by just a few users. If you plan to block inheritance, make sure the users that need access to the blocked report folder are in the security settings for all of its parent groups, including All Reports. If this is not done then those users will not be able to see the folder. Also remember to remove the users and user groups that should not have access to the folder.

4. In the **Users and groups with permissions** list box, select the user or group that you want to configure in the list.

   To set permissions for a user or group that does not appear in the list, click **Add**. Then, in the **User and Group Selection** dialog box, select the users/groups you want to add and click **OK**. If the user/group is not listed, click **More Users** to locate the user. From the list you can choose to add Nuance Output Manager users, LDAP users, or Windows users. You can also choose to import LDAP users. Once users are added, they are placed in the Nuance Output Manager database, causing them to always be listed in the future.

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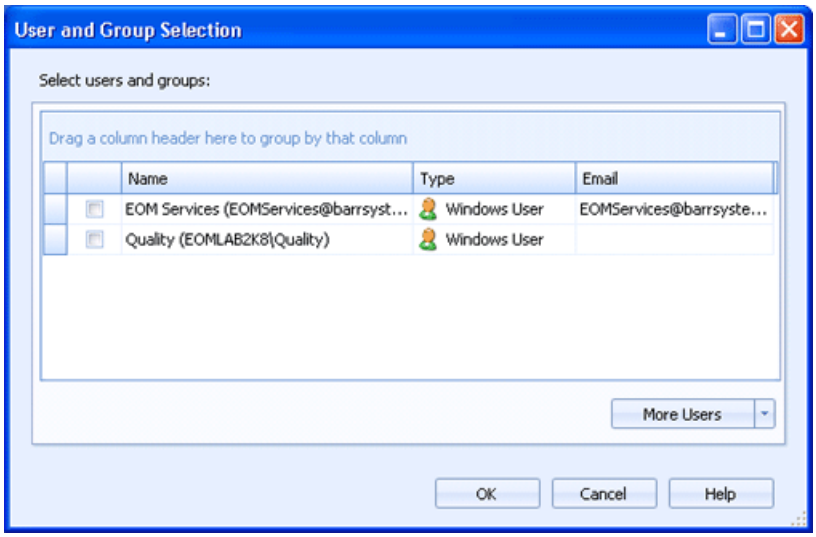

The **Assigned permissions** list box displays the assigned permissions for the selected user.

5. In the **Assigned permissions** box, select or clear permissions for the selected user or group. Click **Select All** or **Unselect All** to quickly assign or remove all permissions.

   If you notice permissions that are selected and disabled, then the user/group selected has inherited permissions. Inherited permissions cannot be removed. To remove inherited permissions, you must first turn off inheritance for the folder.

   The permissions assigned to a folder will be inherited for all of the objects contained in that folder, except for the ones that have inheritance blocked.

6. After you finish making changes to the permission, click **OK**.

How to Send Report Data to a Remote Database

Use this procedure to create a task that sends report data to a remote database.

1. On the Output Manager Console menu bar, select **Tools** > **Schedule Manager**.
2. Click **Add**.
3. On the **Schedule** tab, click **Add**.
4. Define the schedule for sending the report data to the remote database.
5. Select the **Tasks** tab and click **Add**.
6. Select **Push Data to Reporting Database**.
7. On the **New Task** dialog box, specify the task settings for sending the report data to the database.

   New/Edit Task (Push Reporting Data to Database) dialog box on page 630 provides information on task settings.

Using the Report Preview window

When you open a report in the *Reports* application it displays in the Report Preview window. From this window you can search for text, print, export, and email reports. You also have full control over the display. You can change the page layout, background, and magnification level. Review the following procedures for instructions on using the Report Preview window.

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- *View reports*
- *Print reports*
- *Scale reports*
- *Change the zoom level*
- *Change watermark and background settings*
- *Search for text in a report*
- *Export reports*
- *Email reports*

How to View Reports

Use this procedure to open a report in the **Preview** window.

1. Open the report using one of the following methods from the **Reports** tree:
   - Select a report to open it in the current tab.
   - Right-click a report and click **Open** to open the report in the current tab.
   - Right-click a report and click **Open in New Tab** to open a report in a new tab.
2. In the **Parameters** pane, specify the parameter values for a report.

   The report will be based on the specified parameter values. The following parameters display for all reports:

Parameter	Description
Start date	Specifies the start date of the report.
End date	Specifies the end date of the report.
Date range	Specifies a date range for the report. You can choose th e last 7 days, the last 14 days, the previous month, mon th to date, or year to date.

   You may need to configure additional parameters depending on the report.

   Note: To change the parameter values back to their default values, click **Reset**.

3. Click **Submit**.
   Completing this step displays the report.

   Tip: To navigate between pages, use the scroll bars or navigation buttons on the toolbar. These buttons allow you to switch to the first, previous, next, or last page of a report.

   You can enable the **Hand Tool** on the toolbar to scroll content by dragging the report instead of using scroll bars.

How to Print Reports

Complete this procedure to print a report.

Note: You can change the print settings using the **Page Setup** dialog box. To do this, on the toolbar click the **Page Setup** button, or on the menu bar click **File** > **Page Setup**. You can change the page orientation, select the paper size, choose the paper source, and change the page margins.

1. View the report that you want to print.

   For instructions, see *View Reports*.
2. Print the report using one of the following methods:

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To	Do this
Print to the default printer	Do either of the following: • On the menu bar click **File** > **Print**. • On the toolbar, click the **Quick Print** button.
Print using the Print dialog box	Do either of the following: • On the menu bar select **File** > **Print**. • On the toolbar, click the **Print** button. Then, in the **Print** dialog box, specify the appropriate settings and click **Print**.

How to Scale Reports

Complete this procedure to scale a report.

1. View the report that you want to scale.
   For instructions, see *View Reports*.
2. Click the **Scale** toolbar button.
   This opens the **Scale** dialog box.
3. You can adjust the scale using one of the following methods.

To scale	Do this
Using a zoom factor	In the **Adjust to** box, specify a percent value.
To fit a specified number of pages	In the **Fit to** box, specify the number of pages.

4. Click **OK**

How to Change the Zoom Level

Use the following procedures to adjust the Preview zoom level for a report.

- *To zoom in and out*
- *To zoom using the Magnifier tool*
- *To zoom by entering a zoom factor*
- *To zoom reports to fit page content*
- *To zoom reports to display whole pages*
- *To show two or more pages*

To zoom in and out

- To zoom in a document, click the **Zoom In** toolbar button, or press Ctrl+Plus Sign.
- To zoom out of a document, click the **Zoom Out** toolbar button, or press Ctrl+Minus Sign.
- To zoom in or out of a document, you can also press Ctrl and rotate the mouse wheel.

To use the Magnifier tool

Use the Magnifier tool to switch between 100% and "fit whole page" views.

- Click the **Magnifier** toolbar button, and then click anywhere in the document to toggle views.

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To zoom by entering a zoom factor

- Click the **Zoom** drop-down toolbar button and choose one of the zoom levels.
- Manually enter any value into the **Zoom** toolbar box.

To zoom reports to fit page content

Note: If the preview window will be resized later, the current zoom factor will also be changed to fit the current page or text width.

- To zoom to the page width, click the **Zoom** toolbar box and click **Page Width**.
- To zoom to the text width, click the **Zoom** toolbar box and click **Text Width**.

To zoom reports to display whole pages

Note: If the preview window will be resized later, the current zoom factor will be also changed in order to fit one or two pages.

- To display one whole page at a time, click the **Zoom** toolbar box and click **Whole Page**.
- To fit two pages into the current view, click the **Zoom** toolbar box and click **Two Pages**.

To show two or more pages

1. To preview two or more pages simultaneously, click the **Multiple Pages** toolbar button.
2. In the dialog that displays, pause on the page icons, depending on the required number of pages to preview.
3. When the required number of pages has been selected, click the pop-up window to close it and apply changes to the document view.

How to Change Watermark and Background Settings

Perform these procedures to add a text watermark, picture watermark, or background color to a report.

1. *Add a text watermark*
2. *Add a picture watermark*
3. *Add a background color*

To add a text watermark

1. View a report.

   For instructions, see *View Reports*.
2. On the menu bar click **Background** > **Watermark**, or on the toolbar click the **Watermark** button.
   This opens the **Watermark** dialog box.
3. On the **Text Watermark** tab, enter the watermark text in the **Text** box.

   You can also click and select predefined text in the box.
4. As necessary, define other text properties, such as direction, color, font, size, or transparency.
5. For **Position**, determine whether the watermark will be in front of or behind the report text.
6. For **Page Range**, specify the pages to apply the watermark.

   Type page numbers and/or page ranges separated by commas. Specify page ranges using a dash. For example, type 1,3,5-12.
7. Click **OK**.

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To add a picture watermark

1. View a report.

   For instructions, see *View Reports*.
2. On the menu bar click **Background** > **Watermark**, or on the toolbar click the **Watermark** button.
   This opens the **Watermark** dialog box.
3. On the **Picture Watermark** tab, click **Load image**, select the watermark picture, and click **OK**.
4. Customize the image by specifying size mode, horizontal and vertical alignment, tiling, and transparency.
5. For **Position**, determine whether the watermark will be in front of or behind the report text.
6. For **Page Range**, specify the pages to apply the watermark.

   Type page numbers and/or page ranges separated by commas. Specify page ranges using a dash. For example, type 1,3,5-12.
7. Click **OK**.

To add a background color

1. View a report.

   For instructions, see *View Reports*.
2. On the menu bar click **Background** > **Color**, or click the **Color** toolbar button.
3. Choose a color from the **Custom**, **Web**, or **System** palette.

How to Search for Text in a Report

Complete this procedure to search for text in a report.

1. View a report.

   For instructions, see *View Reports*.
2. On the toolbar, click the **Search** button.
   This opens the **Find** dialog box.
3. In the **Find what** box, type the text you want to locate.
4. For **Search Options**, you can specify whether to match case or the whole word during the search, or set the search direction.
5. To start searching or search again, click **Find Next** or press Enter.

How to Export Reports

Complete this procedure to export a report.

1. View a report.

   For instructions, see *View Reports*.
2. Export the report using one of the following methods:
   - On the menu bar, click **File** > **Export Document**, and then select the format for exported file.

     You can choose one of the following formats: PDF, HTML, MHT, RTF, XLS, CSV, text, or image.
   - On the toolbar, click the **Export Document** arrow, and then select the format for exported file.

     You can choose one of the following formats: PDF, HTML, MHT, RTF, XLS, CSV, text, or image.
3. Depending on the format selected, you may be prompted to define format-specific options.

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PDF-specific export options

Page range	Defines the pages which will be included in the complete file. Separate the pages with a comma, set a range of pages with a dash.
Don't embed these fonts	Defines the fonts not to be embedded in the complete file, to get a smaller file size. Separate the fonts with a semicolon.
Images quality	Specifies the required document's image quality level. The higher the quality, the bigger the file, and vice versa.
Compressed	Select to enable compression.
Show print dialog on open	Select, if desired.

- You can also enter values for the Application, Author, Keywords, Subject, and Title fields.

HTML-specific export options

Export mode	The following modes are available: • The **Single file** mode allows export of a document to a single file, without preserving the page-by-page breakdown. • The **Single file page-by-page** mode allows export of a document to a single file, while preserving page-by-page breakdown. In this mode, the **Page range**, **Page border color** and **Page border width** options are available.

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	• The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the complete file. Separate the pages with a comma, set a range of pages with a dash.
Page border color	Specifies the color for the page border from the available palettes.
Page border width	Defines the width of page borders.
Title	Specifies the required document title.
Character set	Defines the character set for your HTML document.

- You can also select the appropriate check box to remove carriage returns.

MHT-specific export options

Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing it into pages. • The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and

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	Page border width options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.
Page border color	Specifies the color for the page border from the available palettes.
Page border width	Defines the width of page borders.
Title	Specifies the required document title.
Character set	Defines the character set, which will be used in the exported document.

- You can also select the appropriate check box to remove carriage returns.

RTF-specific export options

Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing it into pages. • The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page**

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	border color and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.

- You can also select the appropriate check box to include watermarks in the exported document (if they exist).

XLS-specific export options

Show grid lines	Select, if it is required to show grid lines in the resulting XLS file.
Export values using their format	Select, if it is required to preserve the format of values.
Export hyperlinks	Select this option to export hyperlinks.
Sheet name	Defines the sheet name.

CSV-specific export options

Text separator	Defines a text separator (comma by default).
Encoding	Defines the encoding used in the exported document.

- You can also specify whether to quote strings with separators.

TXT-specific export options

Text separator	Defines separator text (TAB by default).

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Encoding	Specifies the encoding to be used in the exported document.

- You can also specify whether to quote strings with separators.

Image-specific export options

Image format	Specifies one from the available image formats to export a document: BMP, EMF, WMF, GIF, JPEG, PNG or TIFF.
Resolution (dpi)	Defines the required image resolution.
Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing the output into pages. • The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.

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Page border color	Specifies page border color.
Page border width	Defines the width of page borders.

4. In the **Save As** dialog box, choose where you want to save the exported file and enter a **File name**.
5. Optional: When prompted whether to open the exported file, click **Yes** if you want to preview the exported file.

How to Email Reports

Complete this procedure to email a report.

1. View a report.
   For instructions, see *View Reports*.
2. Email the report using one of the following methods:
   - On the toolbar, click **Send via E-Mail** arrow, and then click the format for exported file.

     You can choose one of the following formats: PDF, MHT, RTF, XLS, CSV, text, or image.
   - On the menu bar, click **File** > **Send via E-Mail**, and then click the format for exported file.

     You can choose one of the following formats: PDF, MHT, RTF, XLS, CSV, text, or image.

     .
3. Depending on the format selected, you may be prompted to define format-specific options.

PDF-specific export options

Page range	Defines the pages which will be included in the complete file. Separate the pages with a comma, set a range of pages with a dash.
Don't embed these fonts	Defines the fonts not to be embedded in the complete file, to get a smaller file size. Separate the fonts with a semicolon.
Images quality	Specifies the required image quality for documents. Increasing this value increases file sizes.
Compressed	Select to enable compression.
Show print dialog on open	Select, if desired.

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- You can also enter values for the Application, Author, Keywords, Subject, and Title fields.

HTML-specific export options

Export mode	The following modes are available: • The **Single file** mode allows export of a document to a single file, without preserving the page-by-page breakdown. • The **Single file page-by-page** mode allows export of a document to a single file, while preserving page-by-page breakdown. In this mode, the **Page range**, **Page border color** and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the complete file. Separate the pages with a comma, set a range of pages with a dash.
Page border color	Specifies the color for the page border from the available palettes.
Page border width	Defines the width of page borders.
Title	Specifies the required document title.

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Character set	Defines the character set for your HTML document.

- You can also select the appropriate check box to remove carriage returns.

MHT-specific export options

Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing it into pages. • The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.
Page border color	Specifies the color for the page border from the available palettes.
Page border width	Defines the width of page borders.

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Title	Specifies the required document title.
Character set	Defines the character set, which will be used in the exported document.

- You can also select the appropriate check box to remove carriage returns.

RTF-specific export options

Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing it into pages. • The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.

- You can also select the appropriate check box to include watermarks in the exported document (if they exist).

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XLS-specific export options

Show grid lines	Select, if it is required to show grid lines in the resulting XLS file.
Export values using their format	Select, if it is required to preserve the format of values.
Export hyperlinks	Select this option to export hyperlinks.
Sheet name	Defines the sheet name.

CSV-specific export options

Text separator	Defines a text separator (comma by default).
Encoding	Defines the encoding used in the exported document.

- You can also specify whether to quote strings with separators.

TXT-specific export options

Text separator	Defines separator text (TAB by default).
Encoding	Specifies the encoding to be used in the exported document.

- You can also specify whether to quote strings with separators.

Image-specific export options

Image format	Specifies one from the available image formats to export a document: BMP, EMF, WMF, GIF, JPEG, PNG or TIFF.
Resolution (dpi)	Defines the required image resolution.
Export mode	The following modes are available. • The **Single file** mode allows export of a document to a single file, without dividing the output into pages.

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	• The **Single file page-by-page** mode allows export of a document to a single file, divided into pages. In this mode, the **Page range**, **Page border color** and **Page border width** options are available. • The **Different files** mode allows export of a document to multiple files, one for each document page. In this mode, the **Page range**, **Page border color** and **Page border width options** are available.
Page range	Defines the pages which will be included in the result. Separate page numbers with commas; set page ranges using hyphens.
Page border color	Specifies page border color.
Page border width	Defines the width of page borders.

4. In the **Save As** dialog box, choose where you want to save the exported file and enter a **File name**.
   The document created by this procedure is attached to a new empty message in your default mail program.

The Report Designer

Learning About the Report Designer

The Report Designer allows you to create new reports, bind them to data, and even pass them to another workstation and load them into another instance of the Report Designer. In addition to report editing capabilities, it allows you to display its Print Preview and send its output to a printer or export it to a file on disk.

Important: The features of the Reports Designer are constantly changing. Some features described in the Report Designer help may differ from what you see in your application.

Click the area of the window you want to learn more about.

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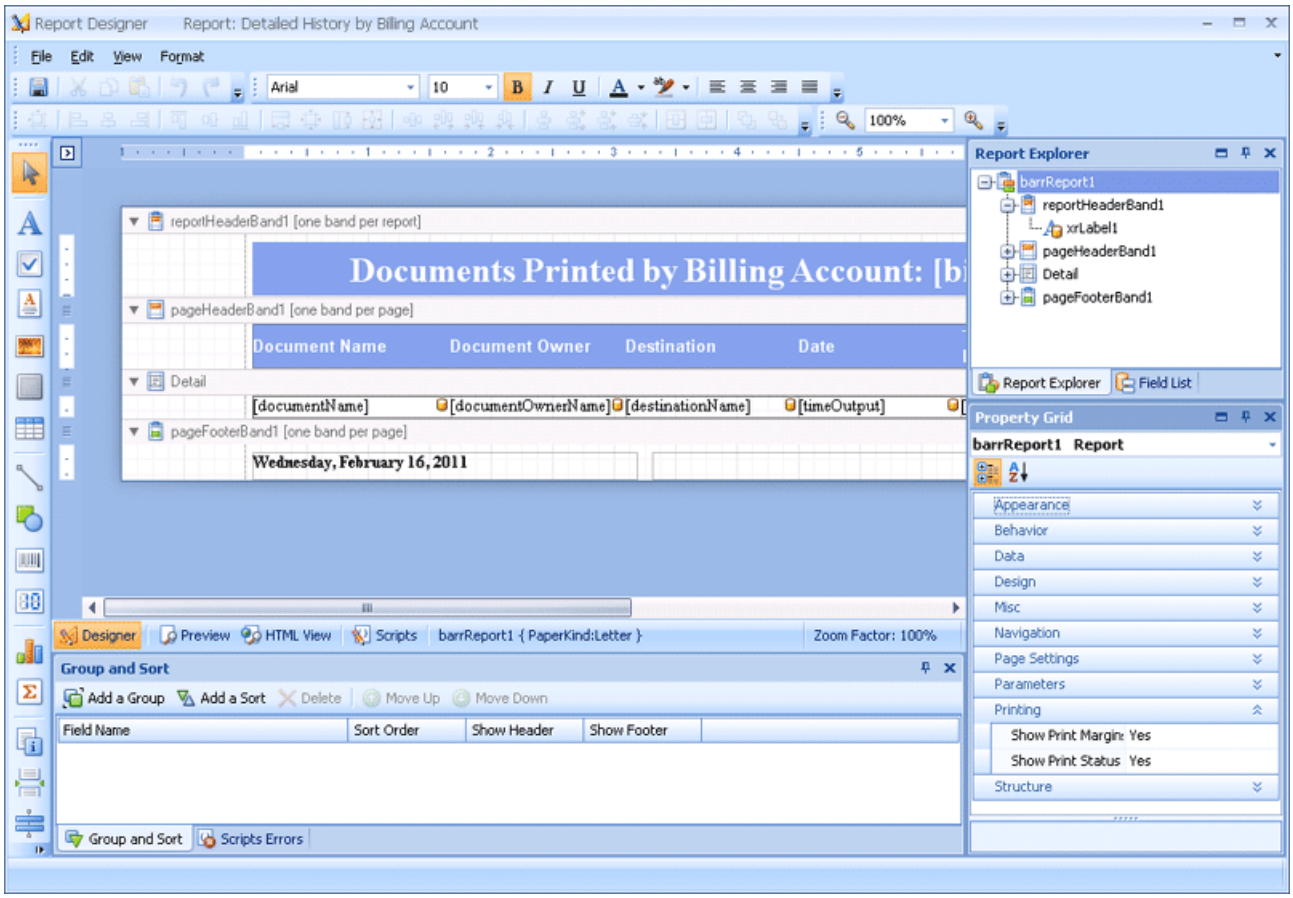

1. *Menu bar* on page 354
2. *Toolbars* on page 356
3. *Tool Box* on page 357
4. *Report Explorer* on page 361
5. *Property Grid* on page 362
6. *Design Panel* on page 358
7. *Group and Sort* on page 360

Menu bar

The menu bar displays below the title bar. Click the following menus to learn about the available commands.

Menu	Command	Description
File	**Save**	Saves the changes to the Nuance Output Manager database.
	Exit	Closes the Report Designer.
Edit	**Undo**	Undo the last action that you did.
	Redo	Repeats the last action that you did.

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Menu	Command	Description
	Cut	Removes the selection and places it o n the Clipboard.
	Copy	Copies the selection to the Clipboard.
	Paste	Inserts the contents of the Clipboard at the insertion point.
	Delete	Deletes the selection.
	Select All	Selects all items.
View	**Designer**	Changes the page layout to one of th e following: • **Preview** — Displays the report in Print Preview mode. You will be prompted to enter report parameters. • **HTML View** — Displays the report in HTML. You will be prompted to enter report parameters.
	Toolbars	Shows or hides the toolbars. Also al lows for customizing the toolbar and menu bar.
	Windows	Shows or hides portions of the wind ow.
Format	**Foreground Color**	Specifies the text color for the contr ol.
	Background Color	Specifies the background color for th e control.
	Font	Specifies the font settings for the con trol.
	Justify	
	Align	Allows you to change the alignment of the control's text.
	Make Same Size	Allows you to choose the control siz e.
	Horizontal Spacing	Allows you to choose the horizontal spacing.
	Vertical Spacing	
	Center in Form	Centers the control in the form horiz ontally or vertically.

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Menu	Command	Description
	Order	Brings the selected controls to the fro nt or moves the selected controls to t he back.

Toolbars

The Report Designer contains the following toolbars.

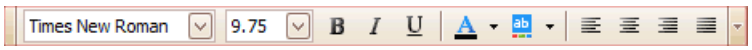
Note: If one of the toolbars are hidden, you can enable it by selecting **View** > **Toolbars** on the menu bar.

Main Toolbar

The **Main** toolbar contains buttons which provide the capability to save report layouts, cut, copy and paste report elements, and undo-redo actions in the **Report Designer**.

Formatting Toolbar

The **Formatting** toolbar allows you to easily customize an element's font, color and alignment settings.

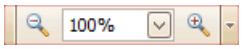


Layout Toolbar

The **Layout** toolbar allows you to easily align report elements to one another, change their size to match one another and customize spacing and z-order.

Zoom Toolbar

The **Zoom** toolbar allows you to zoom a report in and out, providing easier control over report's layout.



Context Menu

The **Context Menu** can be invoked by right-clicking a report or its elements. This menu provides quick access to frequently used commands such as zooming, clipboard operations, inserting bands and invoking the **Property** grid. The available action set varies, depending on the element where you invoked the context menu.

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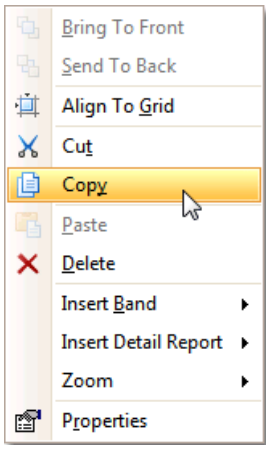
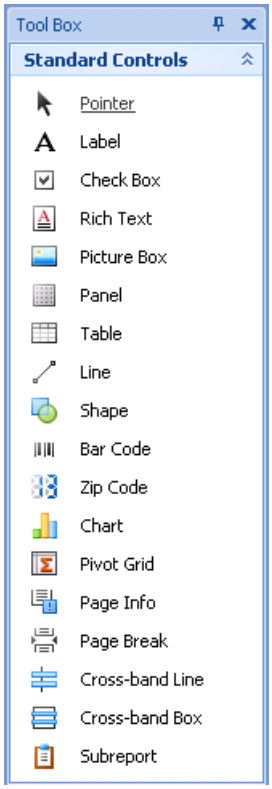


Tool Box

The **Tool Box** lists all available controls and allows you to add them to your report.

Note: If the **Tool Box** panel is hidden, you can show it by selecting **View** > **Windows** > **Tool Box** on the menu bar.



To add a control from the **Tool Box**, do one of the following:

- Double-click a tool in the **Tool Box** for the appropriate control, which will be created at the Detail band's top left corner.
- Drag and drop a tool from the **Tool Box** onto the required location within a report.

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- Select a tool in the **Tool Box**, and then click the required location within a report.
- Select a tool in the **Tool Box**, and then indicate the bounding rectangle by holding the left mouse button.

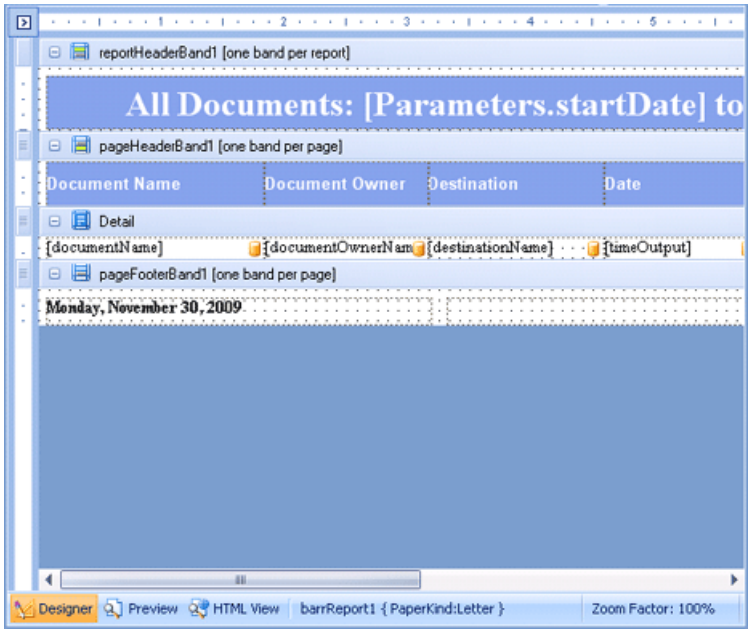
Select the **Pointer** tool when you need to perform selection, repositioning, or resizing. The **Pointer** tool is automatically selected after you drop a control onto a report.

Design Panel

The **Design Panel** provides the following three tabs (switched at the bottom).

Designer tab

This tab allows you to customize a report, manage its report bands and controls, and define their properties.



Smart Tags

From the **Designer** tab, you can use smart tags. Most report elements have smart tags that provide easy access to the most frequently used settings. Clicking a smart tag invokes a pop-up window with action links and editors, allowing you to customize the element.

Report smart tag

A report's smart tag icon is located at the top left corner of the **Design Panel**. Note that you need to click that corner twice. The first click selects the report object, allowing you to change its settings in the **Property Grid**. The second click invokes the smart tag's pop-up window.

Important: You should never change **Data source**, **Data Member**, or **Data adapter** settings in the Reports Designer. Data is automatically pulled from the Nuance Output Manager database, and changing these could cause undesirable results.

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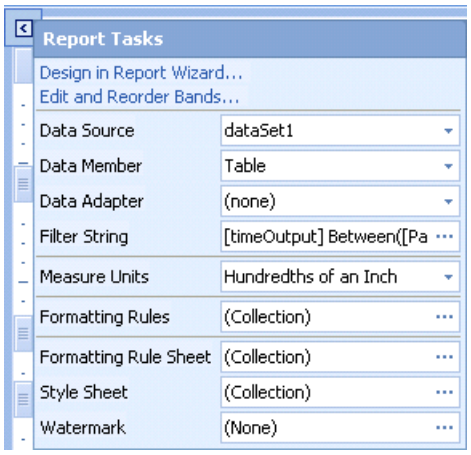
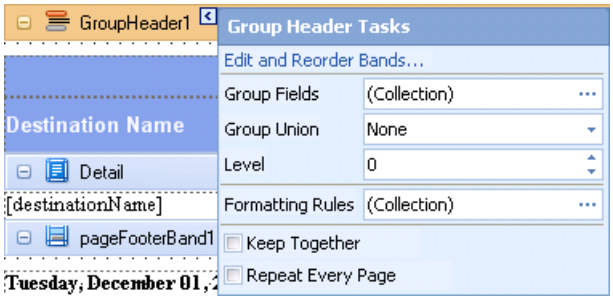


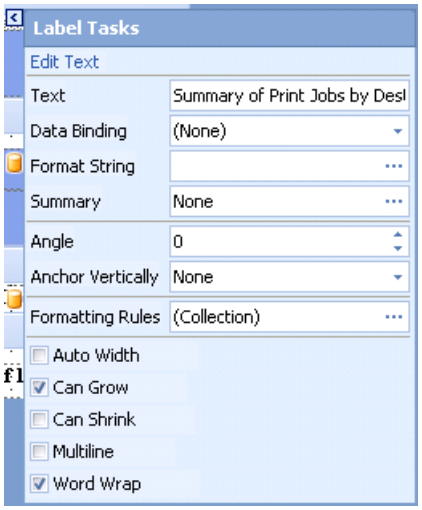
Band smart tag

A band's smart tag icon is located on the band strip right next to its caption. For instance, the smart tag for the **Group Head** band is shown in the following image.



Control smart tag

A control's smart tag icon is located at the top right corner of the control. For instance, the smart tag for the **Label** control is shown in the following image.



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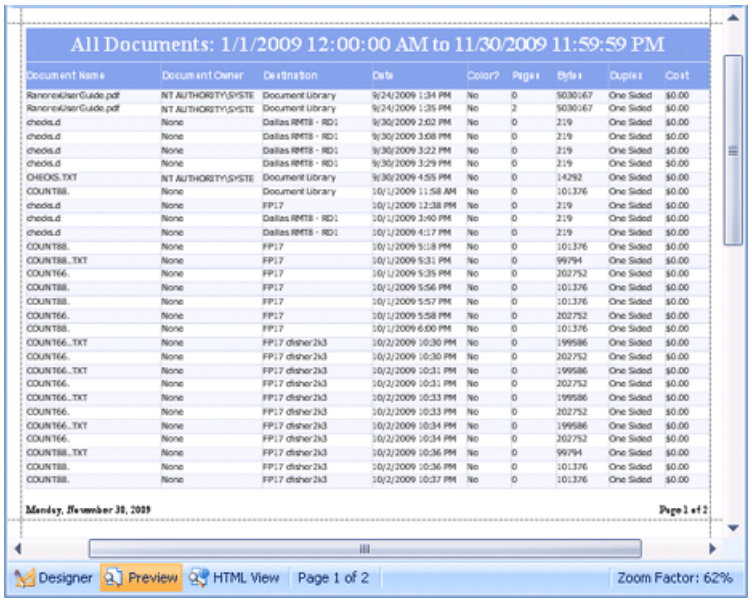
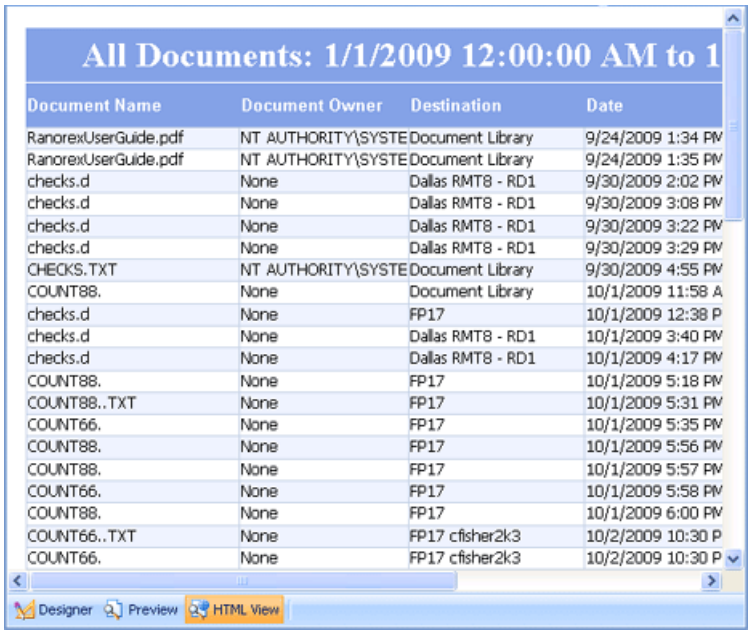
Preview tab

This tab shows a print preview, and enables you to print out your report or export it to a file on disk.



HTML View tab

This tab shows the report output in HTML format.



Group and Sort

Note: If the **Group and Sort** panel is hidden, you can show it by selecting **View** > **Windows** > **Group and Sort** on the menu bar.

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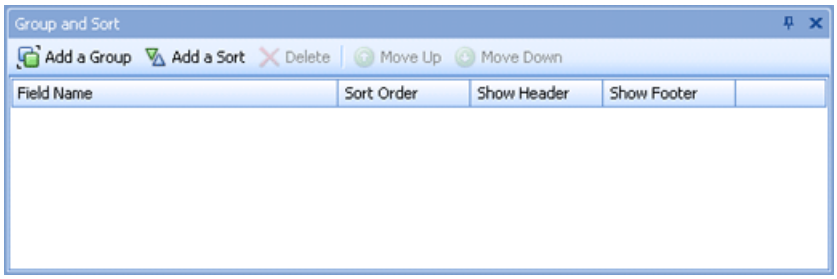


Report Explorer

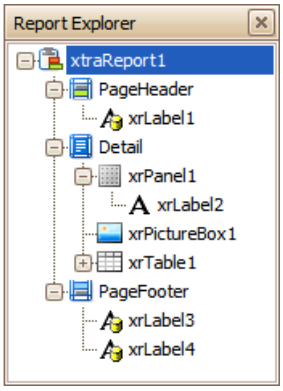
The **Report Explorer** shows the report structure in a tree form. This provides easy access to report elements. Once an element has been selected in the **Report Explorer**, its settings can be changed using the **Property Grid** window.

Note: f the **Report Explorer** is hidden, you can make it visible it by clicking **View** > **Windows** > **Report Explorer** on the menu bar.

The **Report Explorer** contains two tabs, the **Report Explorer** tab and the **Field List** tab.

Report Explorer tab

The **Report Explorer** tab shows the report structure in a tree form. This provides easy access to report elements. Once an element has been selected on the **Report Explorer** tab, it's settings can be changed using the **Property Grid** window.



Field List tab

The **Field List** tab serves the following purposes.

- Displays the list of all available data fields (attributes you can show in your report) and allows you to create report elements that will show information from these fields.
- Allows you to create calculated fields by building expressions based on the values of data fields, report parameter values, and so forth.
- Shows existing report parameters, and allows you to add parameters to your report.

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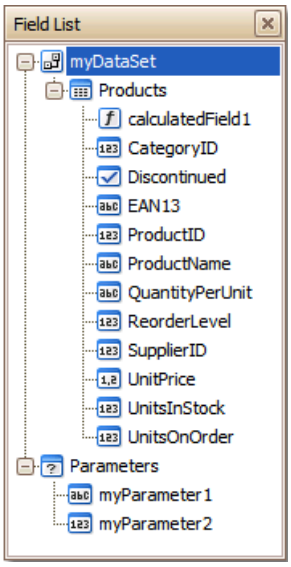
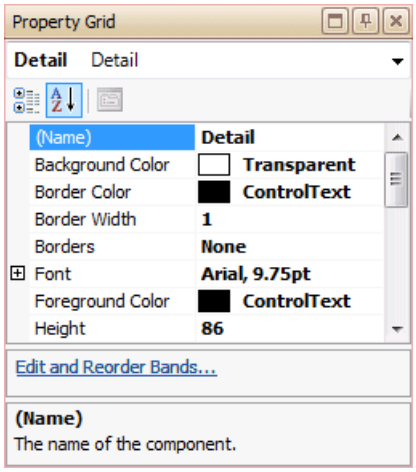


Property Grid

The **Property Grid** allows you to change the settings of the currently selected report element. See the *Report settings* topic for a description of each property.

Note: f the **Property Grid** is hidden, you can enable it by clicking **View** > **Windows** > **Property Grid** on the menu bar.



To select an element and show its properties within the **Property Grid**, do one of the following.

- Click the required element on the **Report Designer** surface.
- Select an element using the **Report Explorer** window.
- Select an element from the **Property Grid** combo box.

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Report Settings

A report is the main object in the **Report Designer**. While a report's properties can be accessed via the report's Smart tag, the complete settings list is available in the **Property Grid**, where all the report's properties are divided into the following groups.

- *Appearance*
- *Behavior*
- *Data*
- *Design*
- *Misc*
- *Navigation*
- *Page Settings*
- *Parameters*
- *Structure*

Appearance

Property	Description
Background Color	Specifies the background color of report elements. This o ption is also available in the **Formatting** toolbar.
Borders **Border Color** **Border Width**	Specify border settings for report elements.
Font	Specifies the font settings for report elements. Some of t hese settings are available in the **Formatting** toolbar.
Foreground Color	Specifies the text color for report elements. This option i s also available in the **Formatting** toolbar.
Formatting Rule Sheet	Invokes the **Formatting Rule Sheet Editor**, allowing yo u to manage and customize formatting rules, which can t hen be defined for a report's bands and controls.
Formatting Rules	Invokes the **Formatting Rules Editor**, allowing you t o choose which rules should be applied to the report du ring report generation, and define the precedence of the applied rules. For more information, see *Conditionally Change a Control's Appearance*.
Padding	Specifies indent values used to render the contents of a r eport's controls.
Style Sheet	Allows you to invoke the **Styles Editor**, which is intende d to manage and customize a report's style sheets. For m ore information, see *Store and Restore Style Sheets*.
Style Sheet's Path	Allows you to define a path to the style sheet contained i n a report style sheet file (.REPSS). For more informatio n, see *Store and Restore Style Sheets*.

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Property	Description
Text Alignment	Allows you to change the alignment of a report controls' text. This option is also available in the **Formatting** tool bar.
Watermark	Allows you to customize a report's watermark options. F or more information, see *Create or Modify Watermarks of a Report*.

Behavior

Property	Description
Export Options	Allows you to set the export options for each file type (P DF, XLS, TXT, and so on). These options vary with the f ile type.
Measure Units	Allows you to choose units of measurement for a report (one hundredth of an inch or a tenth of a millimeter).
Script Language	Allows you to choose the programming language to be u sed in scripting (C#, Visual Basic or J#).
Script References	Allows you to manage the collection of strings that repre sent the paths to the assemblies used by the scripts in a r eport.
Scripts	This property contains events which you can handle with the required scripts.
Show Margin Lines in Preview	The page margin lines are dotted lines shown on the curr ently selected page in the report's preview. Use this prop erty to change the visibility of these lines.
Vertical Content Splitting	Allows you to choose whether report controls outside the right page margin should be split across pages, or moved in their entirety to the next page.
Visible	Specifies whether a report should be created in print pre view.

Data

Property	Description
Calculated Fields	Allows you to access a report's calculated fields collecti on.
Data Adapter	Determines a report's data adapter used to populate the r eport's data source. It is created automatically, and shoul d not be modified.

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Property	Description
Data Member	Determines a specific list in a report's Data Source, for w hich the Report Designer objects display data. It is create d automatically, and should not be modified.
Data Source	Determines a report's data source. It is created automatic ally, and should not be modified.
Filter String	Allows you to invoke the **Filter String Editor**, which is intended to easily define a filtering condition for a report 's data. For more information, see *Change or Apply Data Filtering to a Report*.
Tag	Allows you to add some additional information to a repo rt; for example its id, by which it can then be accessible via scripts.
XML Data Path	Allows you to define a path to data contained in an exter nal XML file. The data contained in the file will then be used as a report's data source.

Design

Property	Description
(Name)	Determines a report's name, by which it can be accessed in the **Report Explorer**, in the **Property Grid**, or using scripts.
Data Source's Schema	Allows you to load an XML/XSD file, containing the sch ema of a report's data source.
Draw the Grid	Determines whether to draw the grid when a report is be ing designed.
Grid Size	Determines the size of a grid defined by a report's **Draw the Grid** property.
Row Count for Preview	This property is intended to reduce the time for report pr eview loading when working with large data sources. For example, if this property is set to 10, only 10 data rows w ill be loaded into a data source. If you want to see all dat a rows, set this property to 0 (as it is by default).
Show Designer's Hints	The designer hints are intended to provide tooltips, both describing the purpose of certain report elements for inex perienced users, and describing the reasons and solutions for possible export or printing warnings. By using this pr operty, these hints can be turned on or off.
Show Export Warnings	The export warnings appear when report controls are ov erlapped, indicating that a report layout may be incorrect when exporting to certain table-based formats (such as X LS, HTML or RTF).

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Property	Description
Show Printing Warnings	The printing warnings are intended to notify you that so me of a report's controls are placed outside the right page margin, so that the report contains unnecessary pages.
Snap to Grid	This property is intended to place controls on a report pre cisely when they are located or resized.

Misc

Property	Description
Bands	Allows you to invoke the Report Editor, intended to man age and customize a report's bands.

Navigation

Property	Description
Bookmark	Allows you to define how a report is named in the docu ment map when the report bookmarks are implemented. By default, it is synchronized with the report's Name pro perty.

Page Settings

Property	Description
Landscape	Determines whether the page orientation is Landscape (when set to Yes) or Portrait (when set to No).
Margins	Determines the width of a report's margins (measured in report units). **Note:** The report's Margins.Top and Margins.Bottom properties are tied to the Height property of the **Page Margin Bands**. Changing these the Margins property values for a band will therefore also change the Height value and changing the Height value will change the Margins values.
Page Height	Specifies page height, in report units. This property can o nly be set if the **Paper Kind** property is set to **Custom**.
Page Width	Specifies page width, in report units. This property can o nly be set if the **Paper Kind** property is set to **Custom**.
Paper Kind	Determines the type of paper for a report. Setting this pro perty to any value different from **Custom** will prevent th e **Page Height**, **Page Width**, and **Paper Name** propertie s from being customized.

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Property	Description
	Note: If the **Paper Kind** property is set to **Custom**, then the printer paper will be selected according to the **Paper Name** property value. In this case, it is also necessary to set the **Page Width** and **Page Height** properties to values that correspond to the selected paper.
Paper Name	Determines the name of the custom paper used in the pri nter that will print the document. **Note:** The **Paper Name** property value is in effect only when the **Paper Kind** property is set to **Custom**. If the printer on which a document is printed does not support the paper type specified by the **Paper Name** property value, then it will default to the Letter paper size. In this case, it is also necessary to set the **Page Width** and **Page Height** properties to values that correspond to the selected paper.
Printer Name	Determines the name of the printer to use when printing a report. The specified printer should be installed on the machine.
Using Settings of the Default Printer	Specifies which default printer settings should be used w hen printing a report.

Parameters

Property	Description
Parameters	Allows you to access a report's parameters collection.
Request Parameters	Allows you to define whether it's required to request the values of a report's parameters when generating the repo rt.

Structure

Property	Description
Bands	Allows you to invoke the **Report Editor**, intended to ma nage and customize a report's bands.

Report Bands

The Report Designer creates banded reports, where bands are report sections that can be printed once in a report (report header and footer), on each report page (page header and footer), for each data entry (detail band), for each data group (group header and footer), and so forth.

- *Band types*

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- *Manage bands*

Band types

The Report Designer supports the following band types.

Detail band	The central part of a report. Unlike other report bands, you cannot delete this band - the present report structure includes the Detail band in its core. The contents of the Detail band are repeated for every data entry. If you're building a report listing, say, employees, it will be rendered for each employee in the database.
Group Header and Footer	The Group Header and Group Footer bands are shown above and below each group. You may use the Group Header bands for grouping by multiple data fields in one of the following ways: • Add several Group Header bands. Specify one group field for each of these bands. This results in nested grouping of the report's data. • Specify several group fields for the **Group Fields** property of the Group Header band. The data will be grouped by certain combinations of field values. The Group Footer band is unnecessary without the corresponding Group Header band. When present, it allows customization by providing a set of properties similar to those of the Group Header. For more information, see *Changing or applying data grouping to a report*.
Report Header and Footer	The Report Header and Report Footer are the only types of report bands rendered once per report. • The Report Header is the first band of a report on the first page, not counting margins as they are "out-of-page" zones. The Report Header precedes even the Page Header band. It is the best place for the report name, company logo, date of creation, author name and miscellaneous information. If you plan to add a chart that visualizes the report's data, then drop the **Chart** control onto this band. • The Report Footer finalizes the informative part of the report. It is placed before the Page Footer and Bottom Margin bands on the last page of the report. Use the Report Footer for report grand totals or conclusions.
Page Header and Footer	The Page Header and Page Footer bands are located at the top and bottom of every page in a report.

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The Page Header/Footer bands are the best place for information that should be printed on every page. For example, use them to display the header of a table which is continued from the previous page.

Note: If you insert page break right after the Report Header (by setting its **Page Break** property value to After the Band), the Page Footer and Page Header bands will not be printed on the first page.

Page Margin bands

The Top Margin and Bottom Margin bands represent the top and bottom page margins. They are intended for displaying page numbers, or some sort of supplementary information (for example, current system time or the user name).

Managing bands

You can manage a report's bands using the **Report Editor**, which may be invoked either through the **Edit and Reorder Bands** context link of a report's **Smart tag** actions list or through any band's Smart tag.

The **Report Editor** allows you to easily add, remove and reorder a report's bands, and to define their properties.

Another way to add a band of a certain type to a report is to invoke the context menu by right-clicking anywhere on a report's surface. Then on the shortcut menu, point to **Insert Band**, and then click the appropriate band on the submenu.

Report Controls

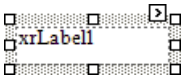
A Report control is an element showing information in your report (for example, static or bound text, line, picture, or check box).

- *Available controls*
- *Add controls to a report*
- *Useful key combinations*

Available controls

The following controls are available in the designer's **Toolbox** panel.

- **Pointer** — Select the **Pointer** control when you need to perform selection, re-positioning or resizing operations. It is automatically selected after you drop a control onto a report.
- **Label** — The **Label** control is intended to display textual information in a report. For example, the **Label** may be used to show static text, as well as data from the bound data source. In addition, you can use it to calculate a summary function for the specified data field, or to extend its usual functionality by writing scripts for the available events.

  After a **Label** is added to a report, you can customize its text, appearance and other properties, which can be accessed in the **Property Grid** panel. Frequently used properties are also available via a control's **Smart Tag** and **Formatting Toolbar**, which makes it easy to perform common operations.

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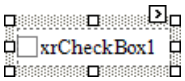
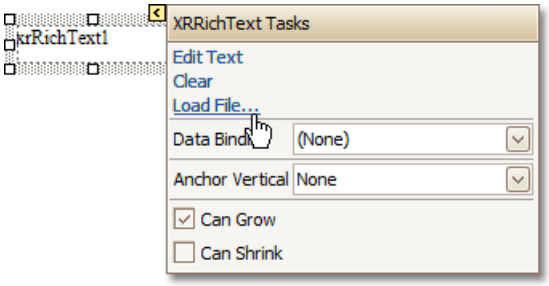
- **Check Box** — The **Check Box** control is intended to display a True/False or Checked/Unchecked/Indeterminate states in a report, by displaying a check mark and adjacent text.



- **Rich Text** — The **Rich Text** control allows you to display, enter, and manipulate formatted text.

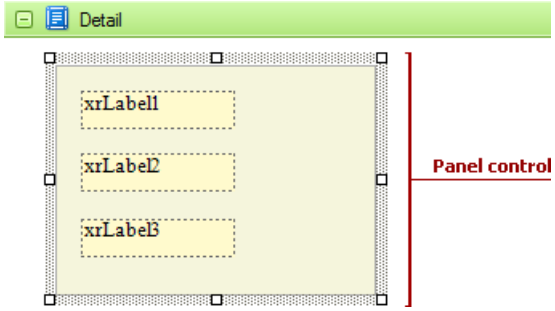
  The control has a functionality similar to the **Label** control, but can also apply formatting to any part of the text. The formatting options include font face, font styles and sizes, font color.

  Rich text files (RTF) can be loaded to this control via its Smart tag.



- **Picture Box** — The **Picture Box** control is intended to display images in a report. Typically, an image is loaded from an image file, or from the bound data source. In addition, an image can be loaded from a web location using the specified URL. The following image formats are supported by the **Picture Box** control: BMP, GIF, JPEG, PNG, TIFF, EMF and WMF.

- **Panel** — The **Panel** control is intended to group individual report controls.



  The **Panel** control is a container to keep together any number of report controls. When the controls are placed onto a Panel, they can be moved, copied and printed as a whole. There are currently several limitations on Panel usage. One of them is that the Panel control does not have the **Can Shrink** property, and so cannot suppress the white space that appears when the controls inside are shrunk or collapsed. Also, the Panel cannot be used in different bands, unlike a cross-band control.

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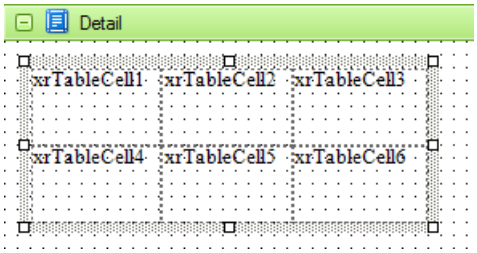
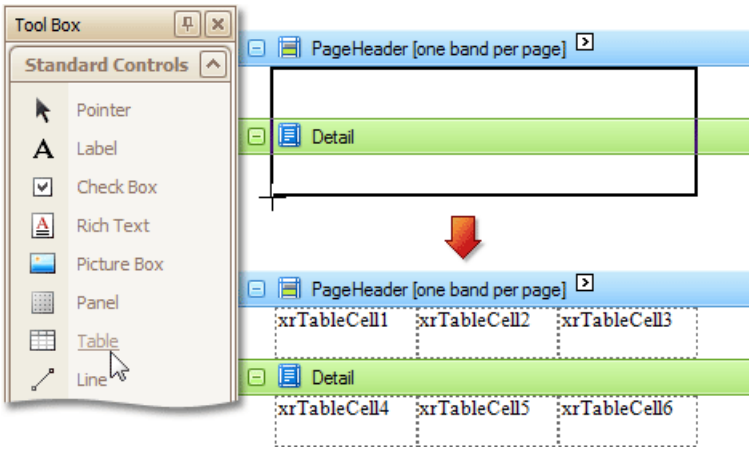
The **Panel** can be used for page decoration — to create borders around the report elements or add a uniform color background.

- **Table** — The **Table** control is designed to arrange the report information in a tabular layout.

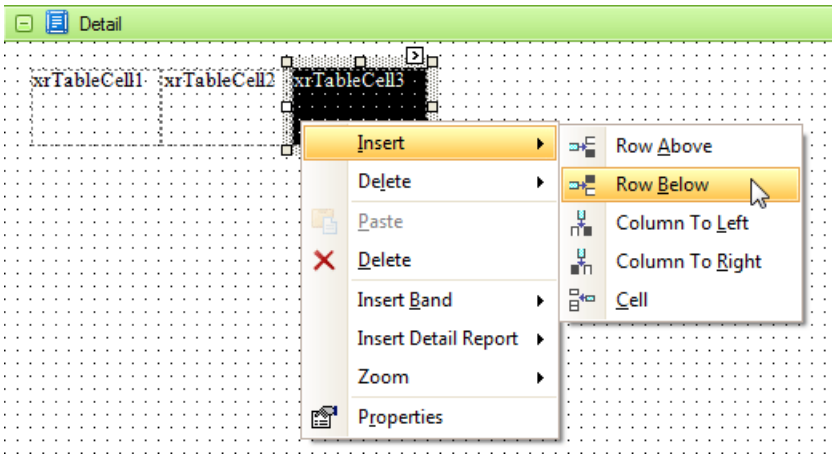


When the **Table** control is dropped onto a report's band from the **Toolbox**, it becomes a table of one row and three columns. If you click and drag over several bands, the resulting table will be split by the bands into several tables. This creates a table header in the header band and the table's body, with one mouse move.



The **Table** control bound to data is created automatically when you drag and drop a data table from the **Field List** window.

You can manage a table's elements by using its context menu.



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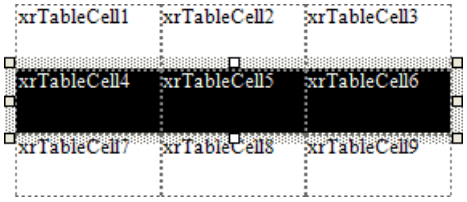
The **Table** control consists of the **Table Row** controls, each representing one table row. The **Table Row**, in turn, consists of **Table Cell** controls, each representing one table cell. They can be selected and customized individually (see the appropriate topics).

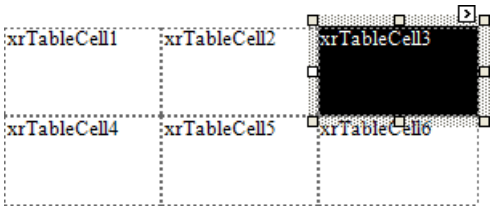
To select the **Table** control in the Report Designer, use the **Report Explorer** or the drop-down selector of the **Property Grid**.

- **Table Row** — The **Table Row** control represents a single row within a table.



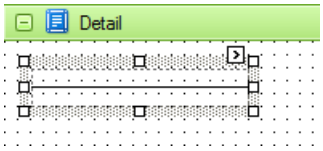
This control is useful for changing the layout of the entire row. Although in this document, a row is described as a separate control, in fact most of its properties are actually applied to the cells contained within the selected row.

- **Table Cell** — The **Table Cell** control represents an individual cell within a table.

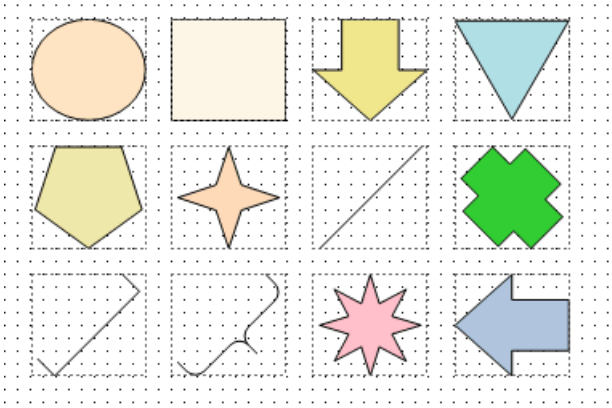


In general, the **Table Cell** control's properties are similar to the properties of the **Label** control.

- **Line** — The **Line** control represents a line used for decoration and visual separation of a report's sections.



- **Shape** — The **Shape** control is typically used for embedding simple graphics into a report.



- **Bar Code** — The **Bar Code** control inserts a barcode into a report.

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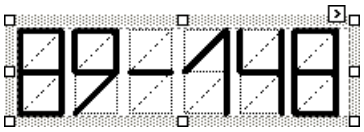
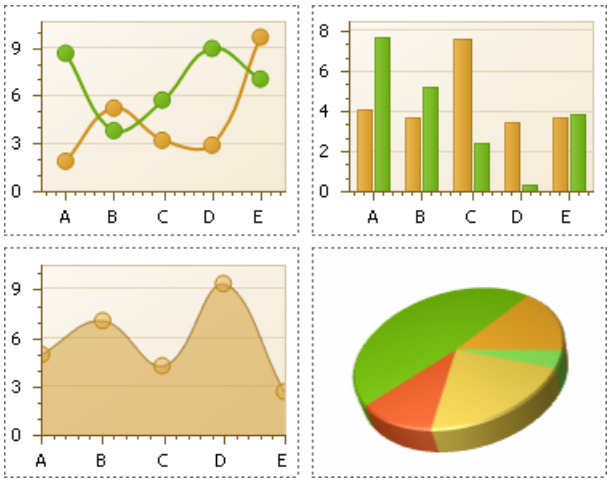
Note: The barcode quality can degrade when the report is exported to formats other than PDF. To ensure reliable barcode recognition, print the report directly from an application using the native printing methods. The **Module** and **Auto-Module** properties of a control should be used with care.

- **Zip Code** — The **Zip Code** control displays a zip code in a report.



- **Chart** — The **Chart** control is used for data visualization in reports. It graphically represents a series of points using 2D or 3D chart types.



There are many built-in chart view types you can choose from, such as Bar, Point, Line, Pie and Doughnut, Area, Radar and Polar, Range Bar, Gantt, Candle Stick and Stock.

A **Chart** control contains multiple elements (diagram, series, series points, axes, legend, titles, labels, strips, constant lines, and so forth). When any of these elements is selected, the **Property Grid** shows only the properties which correspond to the selected item.

The **Chart** control is data-aware in a different manner than the other report controls. Consider three common report scenarios:

- Static data for a chart's series is provided manually. It can be done using the Series Collection Editor invoked by the Chart's Series property. It allows you to manually define values and arguments for each series point.
- Chart's series are created automatically, getting their data from the Chart's Data Source and dependent on the rules defined by the Series Template property.
- Each series is created and customized manually and has a separate Data Source.

You can customize a created chart using both the **Property Grid** and the Chart Wizard. To invoke the Chart Wizard, click a Chart's Smart tag, and in the invoked actions list, click the **Run Wizard** link.

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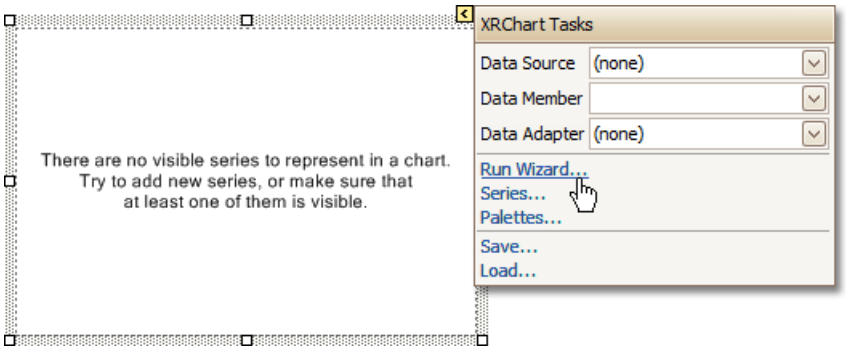
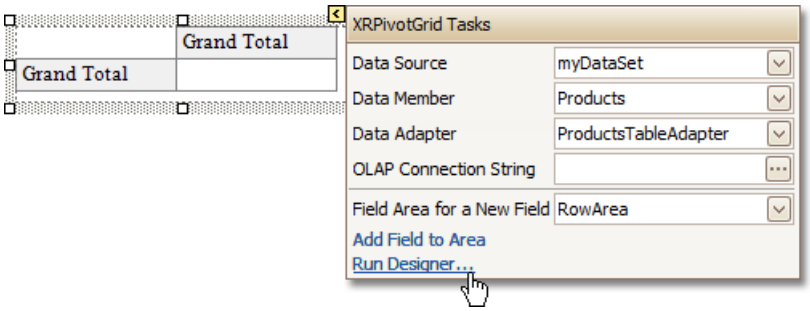


Then, the Chart Wizard will guide you through the whole process of customizing the chart, from defining its view type to providing its data and customizing its appearance.

Note: To use charts and graphs in your report, it's best to start with one of the **Graphing** reports templates that ships with Nuance Output Manager. Do not modify the data source for the report, as all data must come from the Nuance Output Manager database.

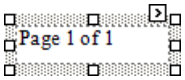
- **Pivot Grid** — The **Pivot Grid** control represents data from an underlying data source in a cross-tabulated form to create cross-tab reports. It calculates summaries and summary totals against specific fields, and displays the summary values within data cells.

  There is a designer allowing you to easily customize the **Pivot Grid**. It can be invoked using the control's Smart tag.



  The **Pivot Grid** displays data in a manner similar to pivot tables in Microsoft Excel. Column headers display unique values from one data field, say, car models. Row headers display unique values from another field, say, dates. Each cell displays a summary for the corresponding row and column values. By specifying different data fields, you can see the total number of cars sold on a particular date, the total number of deals, and so on. This way, you get a really compact layout for data analysis.

- **Page Info** — The **Page Info** control is intended to insert page numbers, current date and time, and the name of the current user into a report.



- **Page Break** — The **Page Break** control is intended to insert a page delimiter, which can be placed at any point within a report.

  This control is visually represented by a short line, attached to the left side of the **Design** panel, as shown in the image below.

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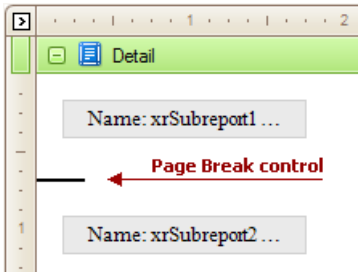
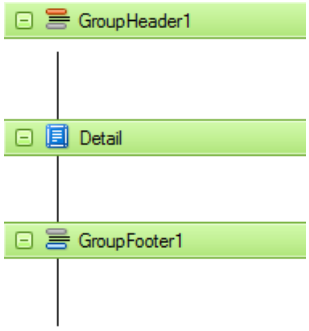


The **Page Break** control is useful when you need to insert a page break between controls within a band — for example, to divide subreports, so that the second subreport starts printing on a new page.

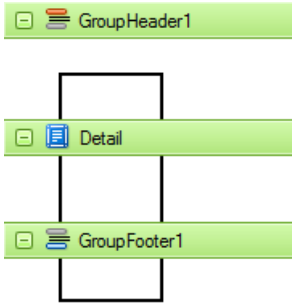
- **Cross-band Line** — The specifics of the **Cross-band Line** control is that it allows you to draw a line through several bands.

  This can be useful if it is required to visually emphasize a section transcending multiple band areas by a line. In other aspects, this control is similar to the **Line** control.



- **Cross-band Box** — The **Cross-band Box** control allows you to draw a rectangle through several bands.

  This can be useful if it is required to visually emphasize a section transcending multiple band areas with a rectangle.



- **Subreport** — The **Subreport** control allows you to include other reports into a current report.

  There are several reasons for using subreports. The first is to reuse reports. This can be practical if there is a particular report structure that has to be included in all reports, and the report must have a consistent appearance and functionality. A good example is a report header that contains the company information, the logo, the date, and so on. The second reason for using subreports is a creation of master-detail reports (reports with hierarchically linked data).

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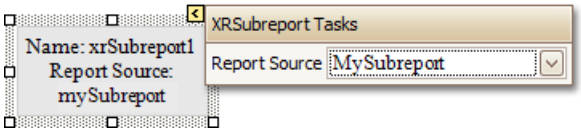

Adding controls to a report

Use one of the following methods to add controls to a report.

- To create a control, drag it from the **Toolbox** panel onto the report's area.
- To automatically create a control bound to data, drag a field from the **Field List** panel, and drop it onto a report's surface. When dropping a field onto an existing control, this control will be bound to the data field.

If you drag the field with the right mouse button, when the button is released the context menu is invoked. Use this menu to specify which control should be created.

To learn more about data binding for report controls, see *Display Values from a Database (Bind Report Elements to Data)*.

Note: When the controls overlap, the report may be shown incorrectly when exported to HTML, XLS or RTF formats. Red signs and a report's tooltip indicate this situation. You may switch off the red warning marks via the report's Show Export Warnings property.

Useful key combinations

To change a control's size and position you can use the following key combinations:

Key Combination	Action
Arrow keys	Snaps the control to the grid and moves it up, down, left or right by one grid step, defined by a report's Grid Size property.
Ctrl + Arrow	Moves the control up, down, left or right by one report u nit.
Shift + Arrow	Increases or decreases the control's width or height by on e grid step, defined by a report's Grid Size property.
Ctrl + Shift + Arrow	Increases or decreases the control's width or height by on e report unit.
Tab	Selects the next control in tab order.
Shift + Tab	Selects the previous control in tab order.

Using the Report Designer

You can use the Report Designer to edit existing reports, as well as create your own reports from scratch. This topic describes the most basic tasks you may encounter when editing a report in the Report Designer.

Important: he features of the Reports Designer are constantly changing. Some features described in the Report Designer help may differ from what you see in your application.

- *Save a report*

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- *Manually update report output*
- *Change element layout in your report*
- *Add or modify static information in your report*
- *Delete report elements*
- *Display values from a database (bind report elements to data)*
- *Use mail merge in report elements*
- *Change value formatting of report elements*
- *Change fonts and colors of report elements*
- *Change or apply data sorting to a report*
- *Change or apply data filtering to a report*
- *Change or apply data grouping to a report*
- *Add totals to a report*
- *Create or modify watermarks of a report*
- *Add page numbers and system information to a report*
- *Add calculated fields to a report*
- *Add parameters to a report*

How to Save Reports

Use this procedure to save a report.

To guarantee that you will be able to revert your report to its original state, you need to create a backup copy. You can do this by right-clicking on the name of the report in the tree view, and clicking **Copy**. This allows you to restore your report to the original state if something breaks.

To save a copy of your report, do one of the following:

- click **File** > **Save**.
- Click the **Save** toolbar button
- Press Ctrl+S on the keyboard.

Completing this procedure saves the report in the Nuance Output Manager database.

How to Manually Update Report Output

Use this procedure to manually update report output.

Sometimes you may need to simply update a couple of values in your report before printing it. In these cases, the simplest way to correct your report is to export it to an editable file (such as RTF), then use an appropriate editor tool to edit values and print your report.

1. To export a report, switch to the **Preview Tab** in the Report Designer.
2. Click the **Export** button as shown.

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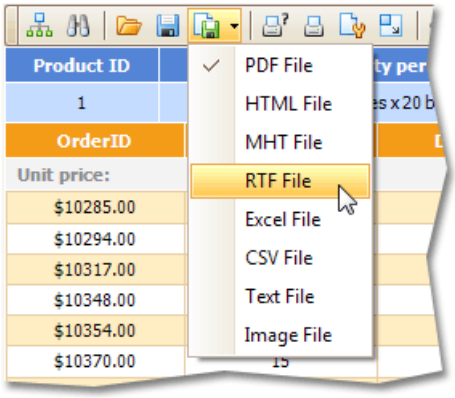


3. Click the export file type on the menu.

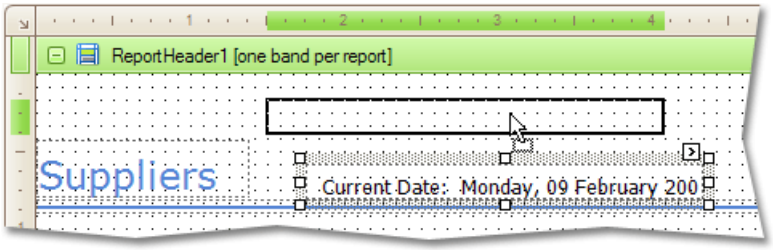
How to Change Element Layout in a Report

Use methods shown in this procedure to select multiple elements in a report, reposition elements, resize elements, and align controls.

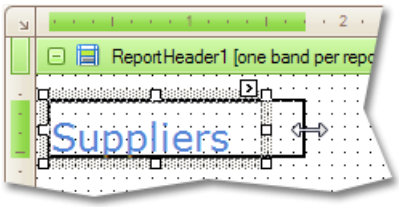
Tip: For information on how to work with tables, see *Report controls*.

- To select multiple controls:
  - Hold down the Ctrl or Shift key and click to add controls to the selection.
  - Click on an empty area, and drag the pointer to create a selection frame.

    This method clears any previous selection.
- To reposition an element in a report, do either of the following.
  - Click and drag an element to another position in the report.
  - Click to select an element, and then press an arrow keys to reposition it.



- To resize an element in a report, do either of the following:
  - Click to select the element, and then drag one of the small boxes shown on its edges and corners.
  - Click to select the element, and then press Shift+Arrow or Ctrl+Shift+Arrow.



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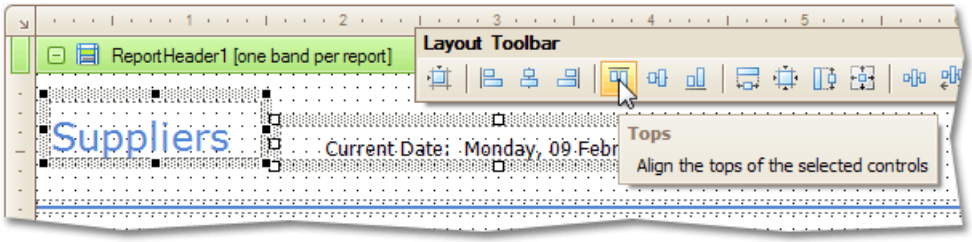
- To align controls in a report, select multiple controls and use the alignment buttons on the **Layout Toolbar**.



How to Add or Modify Static Information in a Report

Reports display static and dynamic information. Dynamic information is something that changes through a report, such as values from a database (actual report data) or service information (such as current user name or page numbers). Static information is text or images that does not change through the report, and does not depend on the current state on the computer. Information can be printed once (as in a report header), can repeat on each page (as in a page header), or can repeat with every entry in your report (as in a label describing data).

- *To change static information in a report*
- *To add information to a report*

To change static information in a report

1. Locate the desired report element in the designer and invoke the element's Smart tag.
2. Click the link or button in the Smart tag to edit content for the element.

   Text elements, such as labels and rich text boxes, also allow in-place editing of their content. Just double-click the element to activate the editor. If you're working with rich text, you can use **Formatting Toolbar**.

To add information to a report

To add information to your report, you need to use an appropriate element from the **Control Toolbox**, such as a Label, Rich Text Box or Picture Box. Once an element has been placed at the appropriate position, specify its content using the Smart tag. For instance, the steps in this procedure describe how to add a rich text box into your report.

1. Drop the Rich Text control from the Report Designer **Toolbox** onto the onto the Detail band.
2. Select the resulting control and click its Smart tag.
3. In the invoked actions list, click the **Load File** link.
4. Define the path to an RTF or TXT file containing the text of the announcement, and click **Open**.

   Tip: You can perform additional text formatting using the **Formatting Toolbar**.

How to Delete Report Elements

Perform this procedure to delete a band or control element from a report.

1. In the Design Panel or Report Explorer, click to select an element or hold down the Shift or Ctrl key and click to select multiple elements.
2. Do one of the following to delete the selection:
   - Press Delete.
   - Right-click the selection, and click **Delete** on the shortcut menu.
   - On the **Main** menu, click **Edit** > **Delete**.

   Tip: You can press Ctrl+Z to cancel the operation.

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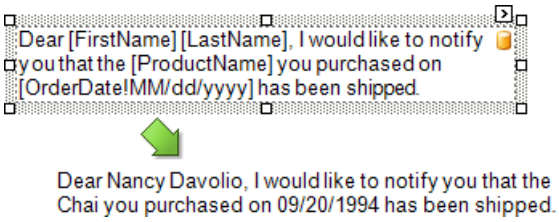
How to Use Mail Merge in Report Elements

Several report elements support Mail Merge. Use this procedure to apply mail merge to these elements.

1. To use mail merge in report elements, insert field names enclosed by square brackets in the element text.



2. To apply formatting to database values when applying Mail Merge, position the cursor on the field name inside the square brackets, and click the Smart tag, and then define the formatting in the **Format Sting** section of the action list.

How to Display Values from a Database

Use this procedure to display values from a database.

Report elements can either display static information or dynamic data fetched from the bound database. Data-bound elements are indicated in the **Report Designer** using a small database icon in the top-right corner.

Sometimes you may work with a report that is missing some information. For instance, you may have an employee list that does not display birth dates. If the database contains this information, you can easily add it to your report using one of the methods described below.

- *Use the Field List*
- *Use the Smart Tab*
- *Use the Property Grid*

To use the Field List

- To bind an existing report element, click the desired field item in the **Field List** window, and then drag and drop it onto the element. The yellow database icon inside the control will then appear.
- To add a new data-bound report element, simply drag the desired field item from the **Field List** window onto a report band. This will create a Label bound to the selected data field.
- A more flexible way to create data-bound elements is to right-click a **Field List** item, and then drag and drop it onto a report. This will invoke the context menu. Simply choose the element type that will represent your data, and it will be automatically created and bound to the selected data field.

To use the Property Grid

1. Click an element's Smart tag.
2. In the menu, expand the **Data Binding** list.
3. Select the data field.

To use the Property Grid

1. Click an element to show it's properties in the **Property Grid**.
2. Expand the **(Data Bindings)** branch that holds the bindable attributes.
3. Specify a data field for the required attribute (for example **Text**).

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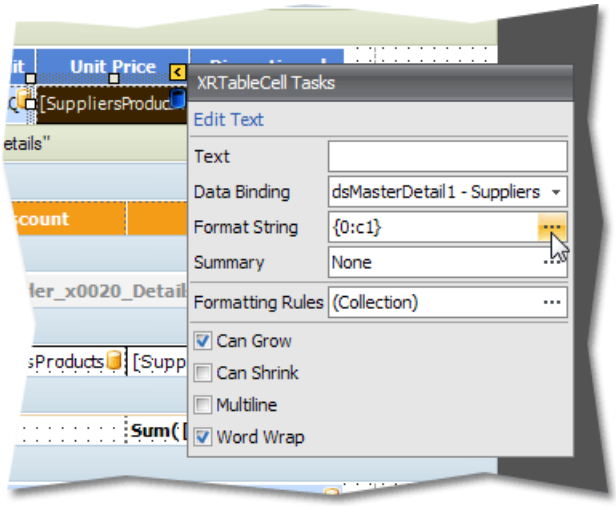
How to Change Value Formatting of Report Elements

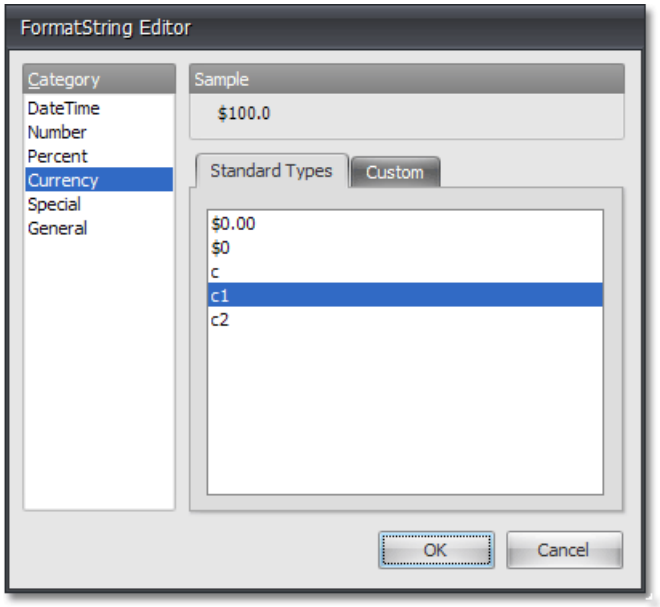
Use this procedure to change value formatting of report elements.

1. To change value formatting, locate the required element, click its Smart tag, and then click the browse button (**...**) in the **Format String** box.



This opens the **Format String Editor** dialog box.

2. Click to select one of the predefined formatting styles.



3. Click **OK** to save the changes and close the dialog box.

How to Change Fonts and Colors of Report Elements

Use this procedure to changes fonts and colors (as well as paddings, text alignment, and other appearance properties) of a report control or band.

- Select this element and do one of the following:

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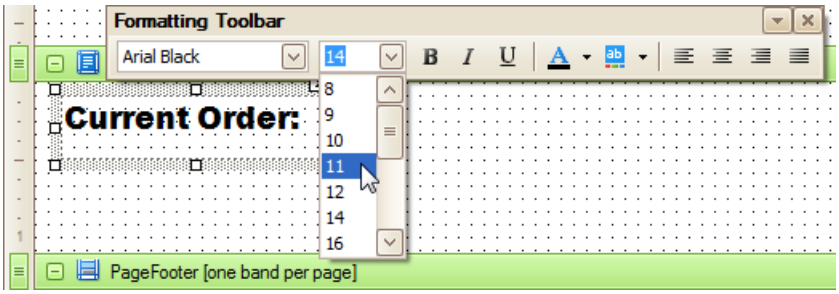
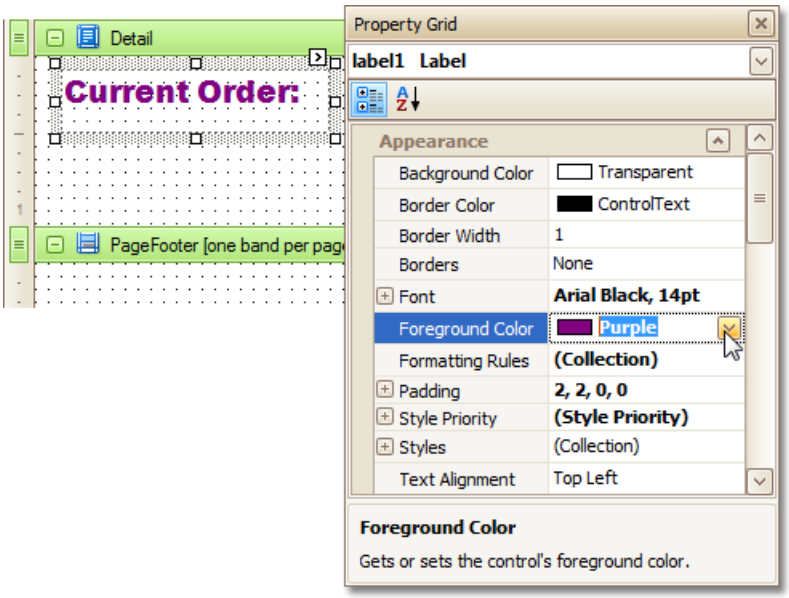
- Use the **Formatting Toolbar**.



- Use the **Property Grid**. Note that all appearance-related properties are located under the **Appearance** category.



How to Change or Apply Data Sorting to a Report

Use this procedure to sort a report's data.

In this example, we use a report containing a Label control bound to a **CategoryID** data field. This field will be used as a sorting criteria.

1. Click the **Detail** band's Smart tag, and in the menu, click the **Sort Fields** browse button (**...**).
2. In the dialog, click **Add**, to add a new entry.

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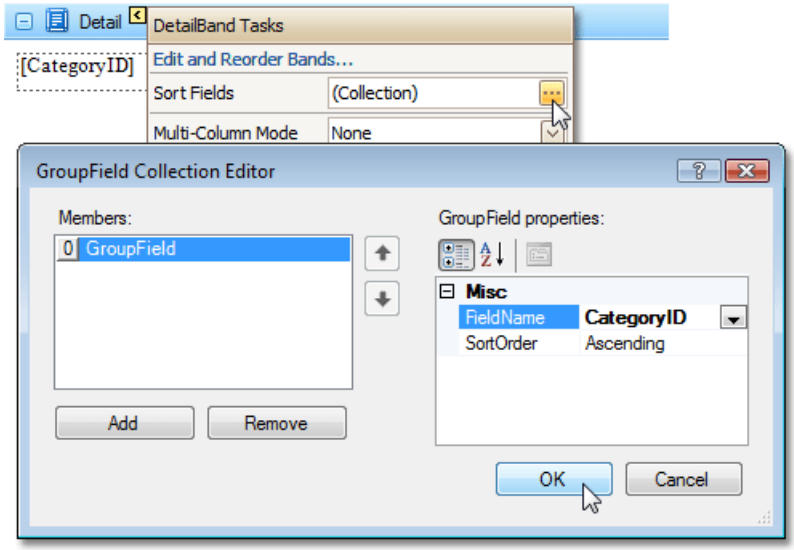


3. Set the **FieldName** property to a data field against which you want to sort your data. You can also define a sorting order (ascending or descending).

   Note: You can sort data against multiple data fields. For this purpose, add more entries and specify their data field and sort order settings.

4. Click **OK** to save your changes and close the dialog box.

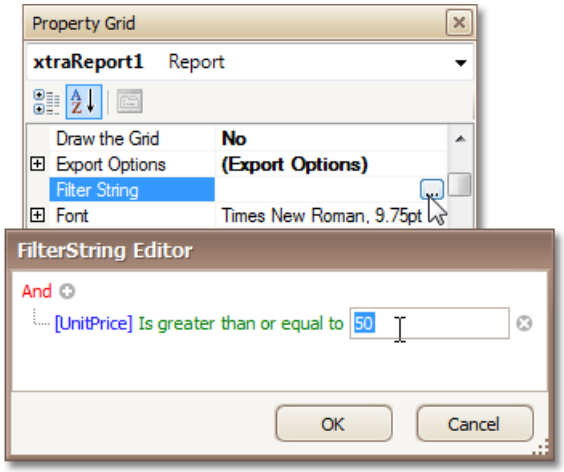
This completes the report. Switch to the **Preview Tab** and view the result.

How to Change or Apply Data Filtering to a Report

Use this procedure to filter report data.

This procedure describes how to add conditions to the filter string for a report. You can also request a filtering parameter each time a report is previewed. For more information, see *Add Parameters to a Report*.

1. In the **Reports** navigation pane of the Reports Application, click to select the report.
2. In the **Property Grid**, click the browse button (**...**) in the **Filter String** box.



This opens the **FilterString Editor** dialog box.

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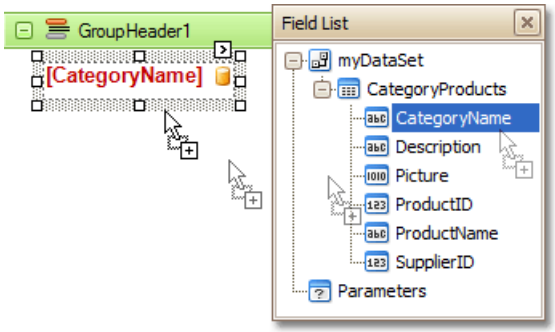
3. Click **And** + to filter criteria.
4. Switch to the **Preview** tab to view the result.

How to Change or Apply Data Grouping to a Report

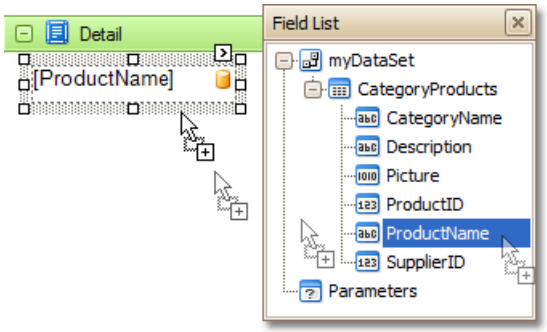
This procedure demonstrates how to group a report's data.

Data grouping can only be performed if a report is bound to a data source.

1. Add a **Group Header** band to the report.
   To do this, right-click anywhere over the report's surface, and click **Insert Band** > **GroupHeader**.
   This creates the **GroupHeader1** band.
2. In the **Field List**, click and drag the field you want to use as a grouping criteria onto the **GroupHeader1** band.



3. Drag another field to represent the general report's data onto the report's **Detail** band.



4. Click the Smart tag of the **GroupHeader1** band, and in the actions list click the browse button (**...**) in the **Group Fields** section.

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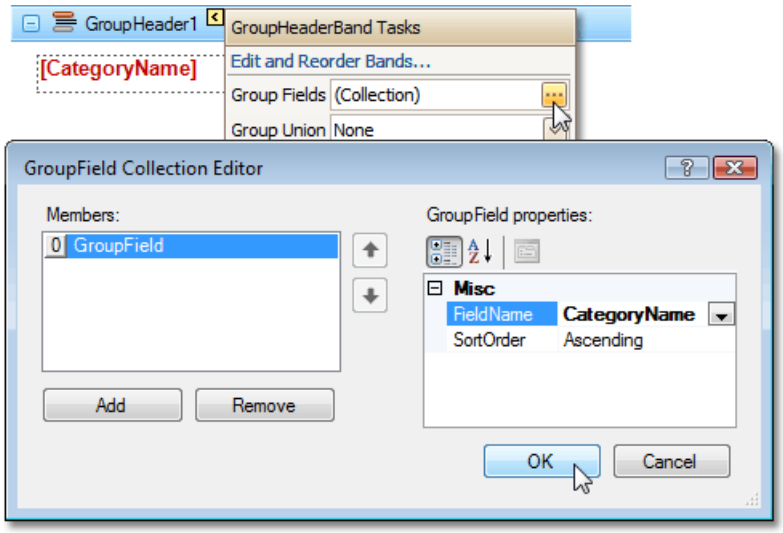
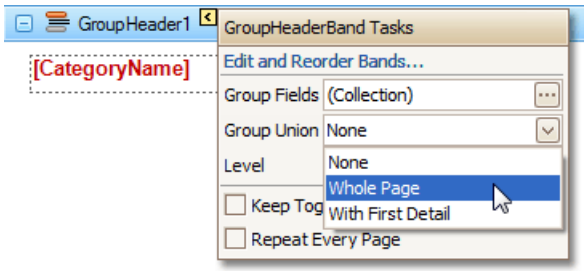


This opens the **GroupField Collection Editor** dialog box.

5. Click **Add** to add a new grouping field, and then set its **Field Name** property to the required field.

   Note: You can set the **Sort Order** property to define the sort order for this grouping field as ascending or descending.

6. Click **OK** to apply the changes and close the **GroupField Collection Editor** dialog box.
7. Click the **GroupHeader1** band's Smart Tag, and in the **Group Union** drop-down list, click **Whole Page**.



This causes a report group to start on a new page if it does not fit entirely on a page.

8. Switch to the **Preview Tab** to view the result.

How to Add Totals for a Report

Perform this procedure to calculate summaries (totals) within a report.

1. Add the *Report Footer* band if it is not present in the report.

   To do this, right-click anywhere in report's area and click select **Insert Band** > **Report Footer**.

2. Hold down the Ctrl button while you click and drag the field for which a summary will be calculated onto the Report Footer area.

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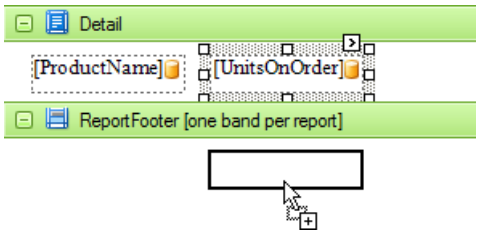


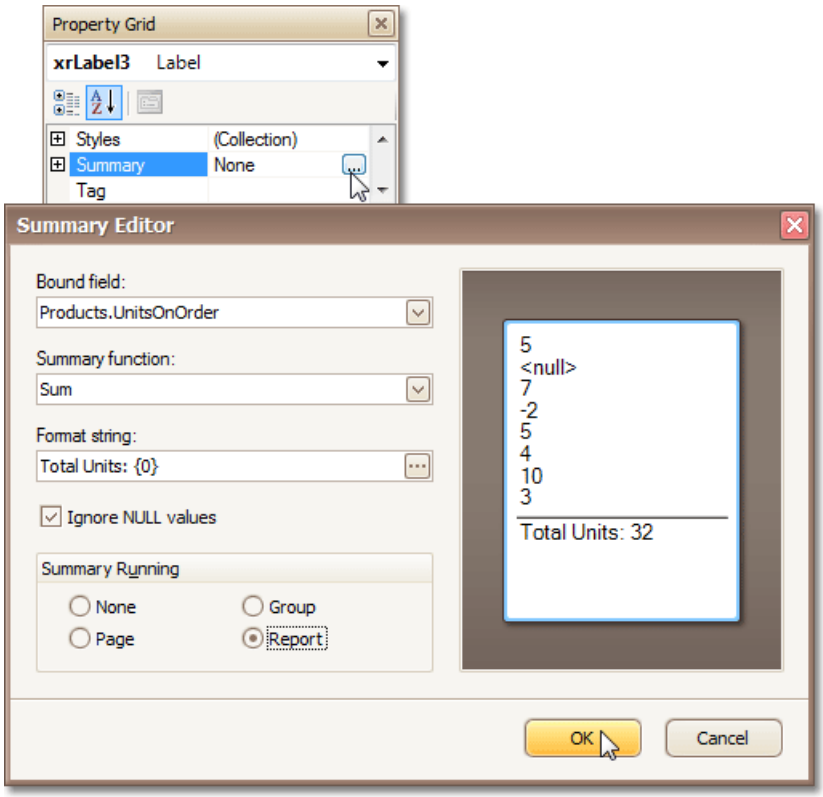
Tip: You can also create a new label for your total by dragging it from the **Control Toolbox**.

Completing this step creates an exact copy of the Label that will display the summary.

3. Select the newly created Label, and in the **Property Grid**, click the browse button (**...**) in the **Summary** box to open the **Summary Editor**.

   The following image shows an example of how you can set up your total.

   Note: The **Summary Running** option is set to **Report**, to ensure that all values from the specified data field are taken into account.



   Tip: The **Ignore NULL values** option will not affect the result in this example, because NULL values are treated like zeros, by default. Therefore, Sum will not change whether these values are taken into account or not. This option is important for functions like Count or Average that are affected by the number of values.

4. Click **OK** to save the settings and close the **Summary Editor** dialog box.
5. Switch to the **Preview Tab** to view the result.

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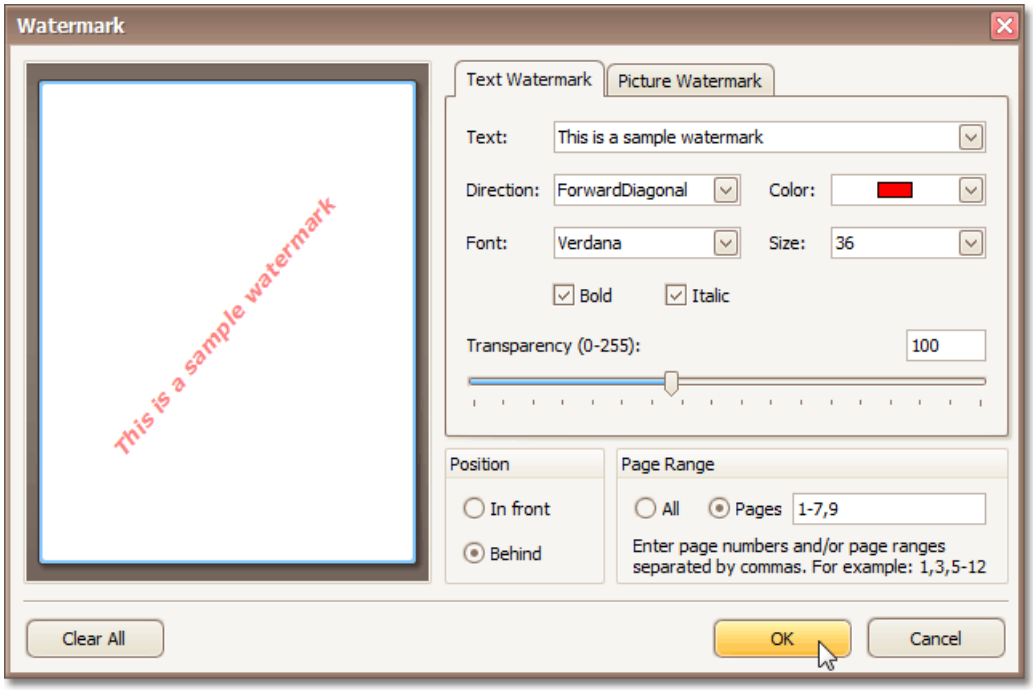
How to Create or Modify Watermarks for a Report

This procedure describes how to add a text watermark to a report, to turn a picture into the background for a report, or to modify an existing watermark.

Note: Watermarks are visible only in the Preview and HTML View modes.

1. To select the report, click anywhere over the blank surface surrounding its *bands* area.
2. Then, in the *Property Grid*, click **Watermark** ellipsis button. The **Watermark** dialog will appear.
3. In the **Text Watermark** tab of this dialog box, define required properties, such as Text, Direction, Color, Font, Transparency, and Page Range.



4. Switch to the **Picture Watermark** tab, to load an image to be used as a watermark, and define its properties, such as Size mode, Alignment (vertical and horizontal), Tiling, Transparency, and Page Range.

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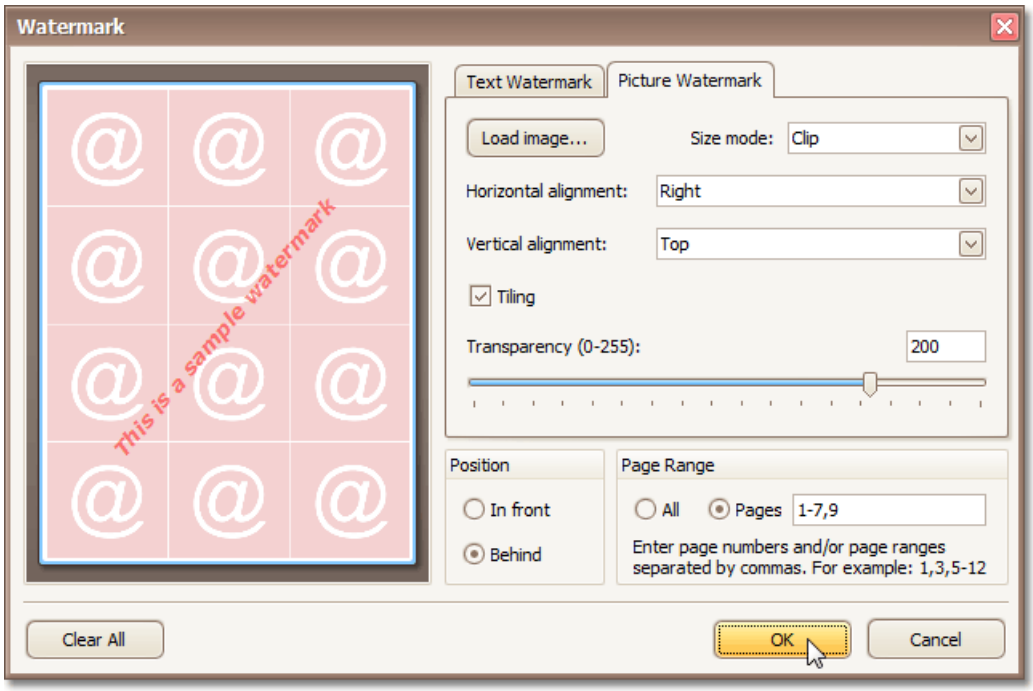
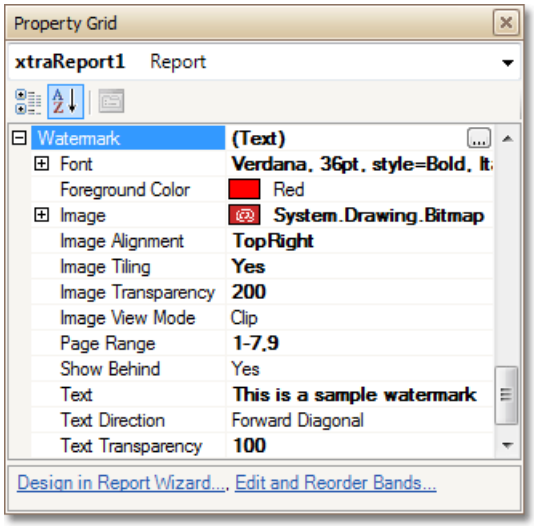


As you can see here, it is possible to simultaneously use both textual and image watermarks.

5. Optional: You can define all the watermark options in the **Property Grid** without using the dialog.

   To do this, expand the **Watermark** property in the **Property Grid** and set the required properties directly.



6. After you configure the watermark, switch to the **Preview** tab to view the result.

How to Add Page Numbers and System Information to a Report

This procedure describes how to insert page numbers or other system information (such as current date and time and user name) into a report.

Generally this information is displayed within the **Page Header**, **Footer**, or **Page Margin** bands.

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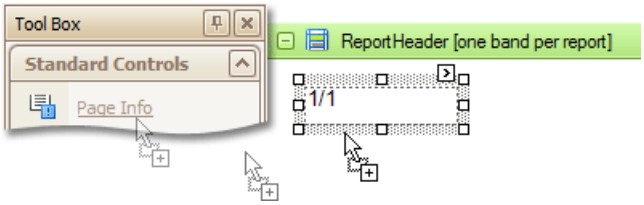
1. To add page numbers or system information to a report, locate the **Control Toolbox** and drag the **Page Info** control to one of these bands.



2. Follow the instructions below for a specific task:
   - *Add page numbers*
   - *Add system date and time*
   - *Add the user name*

To add page numbers

1. Select the **Page Info** control.
2. In the **Property Grid** click the **Page Information** drop-down list.

   You can select whether to display only the page number (Latin or Roman - uppercase or lowercase), or the current page number of total pages.
3. Define a formatting to the control's text.
   For example, in the **Property Grid**, set the **Format** property to `Page {0} of {1}`.

To add system date and time

1. Select the **Page Info** control
2. In the **Property Grid**, click the **Page Information** drop-down list.
3. Click **Current Date and Time**.

Tip: You can also define a formatting to the control text using its **Format** property.

To add the user name

1. Select the **Page Info** control.
2. Then in the **Property Grid**, click the **Page Information** drop-down list.
3. Select **User Name**.
4. Define a formatting to the control text.
   For example, in the **Property Grid**, set the **Format** property to `Current User: {0}`.

How to Add Calculated Fields to a Report

This procedure demonstrates how to add a calculated field to a report.

The main purpose of calculated fields is to perform calculations over different data fields. To learn how to easily perform calculations within a single data field, refer to *Adding totals to a report*.

1. To create a calculated field, in the **Field List**, right-click any item, and click **Add Calculated Field**.

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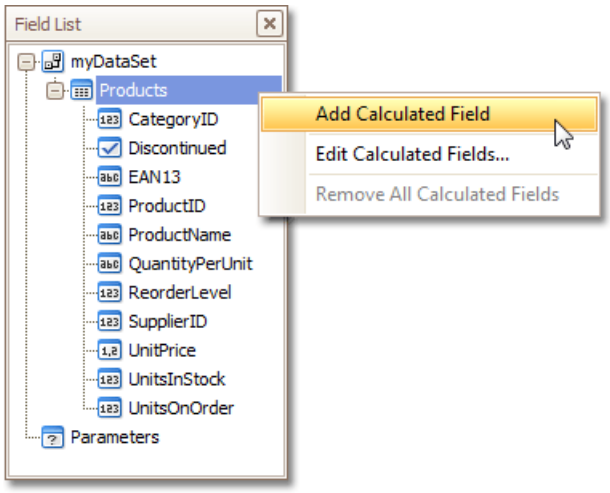
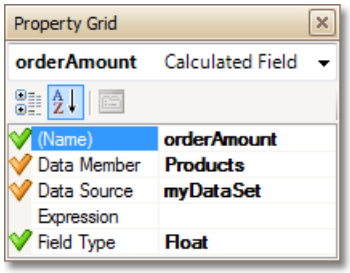


2. In the **Field List**, select the created field to show its properties in the **Property Grid**.



3. Change the **Field Type** property setting to an appropriate value.
4. To create an expression for the calculated field, first click the browse button (**...**) in the **Expression** section to open the **Expression Editor**.

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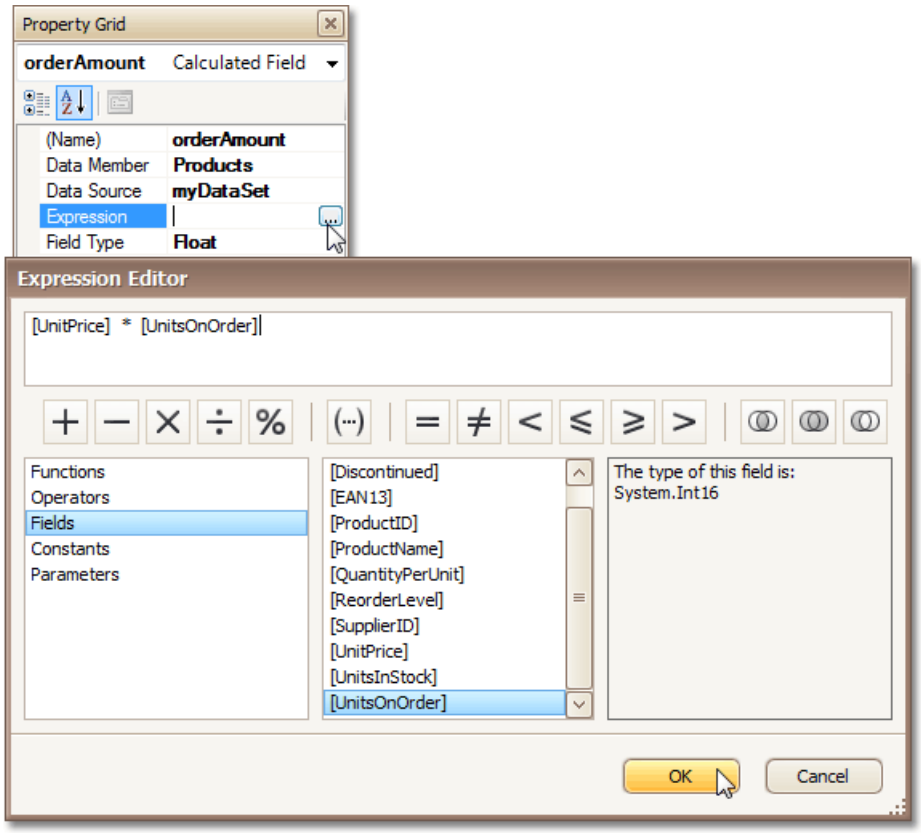

You can also open this dialog by right-clicking a calculated field within the **Field List** and clicking **Edit Expression** on the shortcut menu.

5. You can now perform any of the following operations:
   - Click Fields to see the field list.
   - Double-click field names to add them to the expression string.
   - Use the toolbar to add operators between field names.
6. Click **OK** to save the expression and close the dialog box.
7. Drag the calculated field from the **Field List** onto a control or a table cell.

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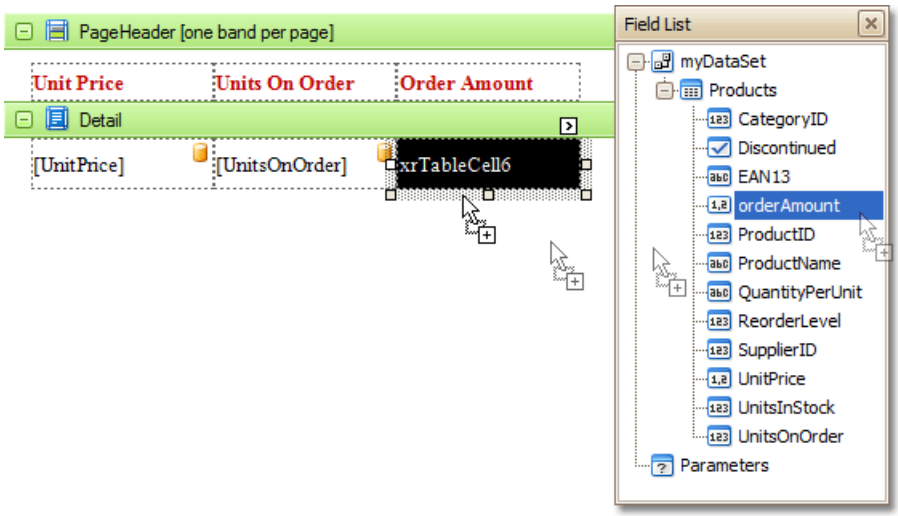

8. Switch to the **Preview** tab to view the with a calculated field.

How to Add Parameters to a Report

Follow this procedure to add parameters and filter your report based on their values.

Sometimes it is useful have parameters in your report. Parameters can help you filter your data.

Tip: To specify a value that will be used to calculate other values, you can use calculated fields. For more information, see *Add Calculated Fields to a Report*.

1. In the **Field List** window, right-click in the **Parameters** section, and click **Add Parameter**. Repeat this action to create the second parameter.
2. In the **Field List**, click the **FromDate** parameter, and in the **Property Grid** set its properties as follows:

Property	Setting
(Name)	FromDate
Description	From:
Parameter Type	Date Time

3. In the **Field List**, click the **ToDate** parameter, and in the **Property Grid** set its properties as follows:

Property	Setting
(Name)	ToDate
Description	To:
Parameter Type	Date Time

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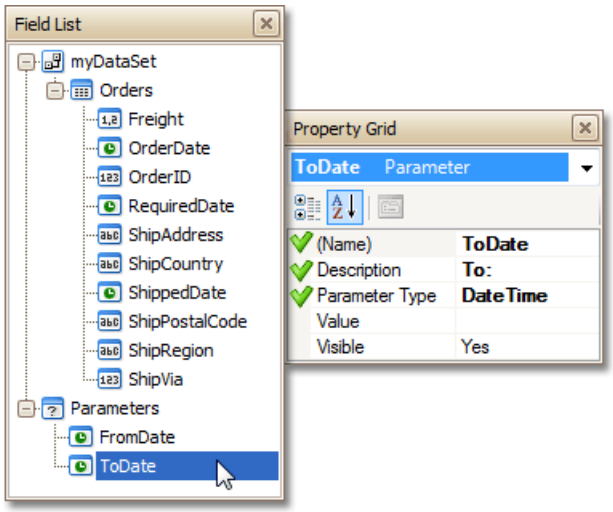
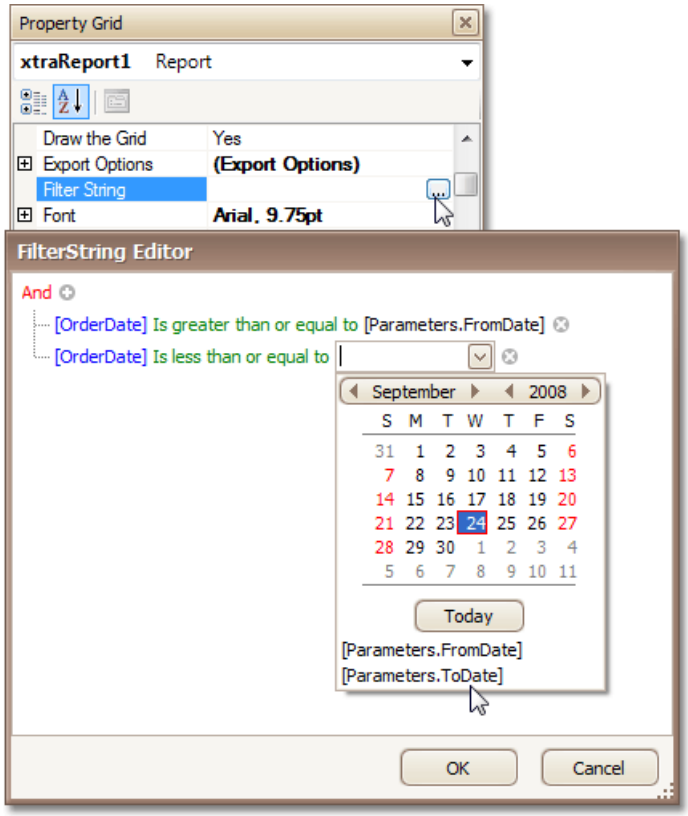


You have now created two report parameters. Every time you preview your report, you will be asked to enter their values. The following instructions explain how to use these values to filter your report's data.

4. In the Report Designer, click anywhere over the blank space to select the report.
5. In the **Property Grid**, click the browse button (**...**) in the **Filter String** box.
6. In the The **FilterString Editor**, define expressions using the parameters that you just created.



The parameterized report is now ready.

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7. Make sure that the report's **Request Parameters** property is set to Yes.

   This is the default setting for the **Request Parameters** property. If this property is not set to Yes, the parameters will not be requested during the preview, and you will get a blank report.

8. Switch to the **Preview** tab, and in the **Parameters** section, define the required values and click **Submit**.

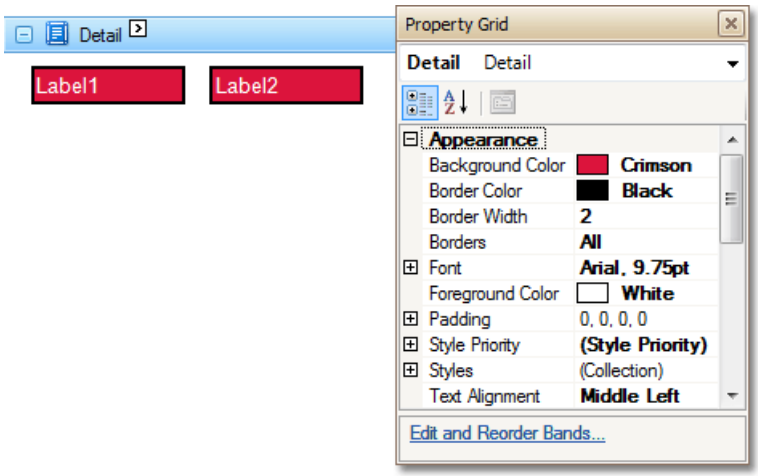
Styles and Conditional Formatting in Reports

This section covers appearance-related information about the Report Designer.

- *Understand styles concepts*
- *Use odd and even styles*
- *Store and restore style sheets*
- *Conditionally change a control's appearance*
- *Conditionally hide bands*
- *Conditionally change a label's text*

Understanding Styles Concepts

Each report element (band or control) and the report itself has a group of properties, specifying the element's appearance, such as **Background Color**, **Borders**, **Border Color**, **Border Width**, **Font**, **Foreground Color**, **Padding** and **Text Alignment**. By default, these properties are set to empty values, which means that their real values are obtained from a control's (or band's) parent. In turn, this means that these appearance-related properties, defined by a parent, are spread to their child elements.



You can also define a control's appearance properties independently from its parent.

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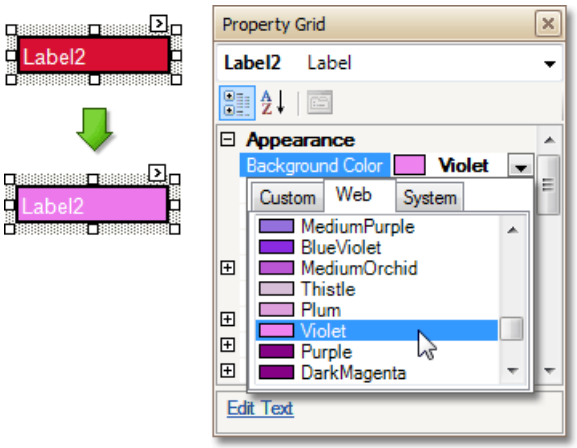
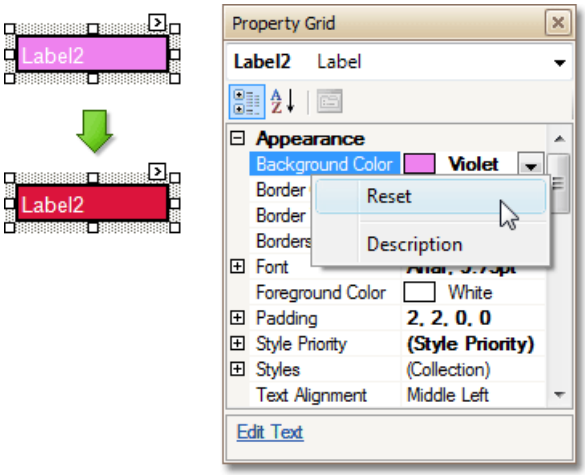


When you need to reset a value assigned to a control's appearance property, you can right-click this property in the **Property Grid**, and click **Reset**. So, the control will be restored to the appearance of its parent.



Note: Some of these properties are only applicable to certain controls. For example, the Line control ignores the **Text Alignment** property, assigned to the Line's container band.

Additionally, there can be styles created in a report. A report's styles live in the report's **Style Sheet** collection. A style stored within this collection has a set of the same appearance properties, as a control or a band has. There are two ways to store a report's style sheets. The first approach is to save them to external files (with REPSS extension), and then load them to a report using its **Style Sheet Path** property in the read-only mode (this is described in the topic *Storing and restoring style sheets*). The second is to store the style sheets within the report (using the **Style Sheet** property), so that they can be modified, if required, and saved with the report itself.

Finally, the styles can be assigned to a report's bands and controls. So, there is an option for the band or control to obtain its appearance either from a style assigned to it, or from the control's own appearance properties. In this case, the control's **Style Priority** property allows you to define the required behavior of the control's final appearance.

By default, except for **Use Text Alignment**, all the **Style Priority** options (**Style Priority.Use Background Color**, **Style Priority.Use Border Color**, and so forth), which follow the structure of the style and appearance properties, are set to Yes. This means that if any style is assigned to a control by its **Styles** property, all of its properties will have a higher priority than the properties stored in the control or in its parent. If you want some of the properties to be determined by a control, rather than its style, set the corresponding **Use*** property to No.

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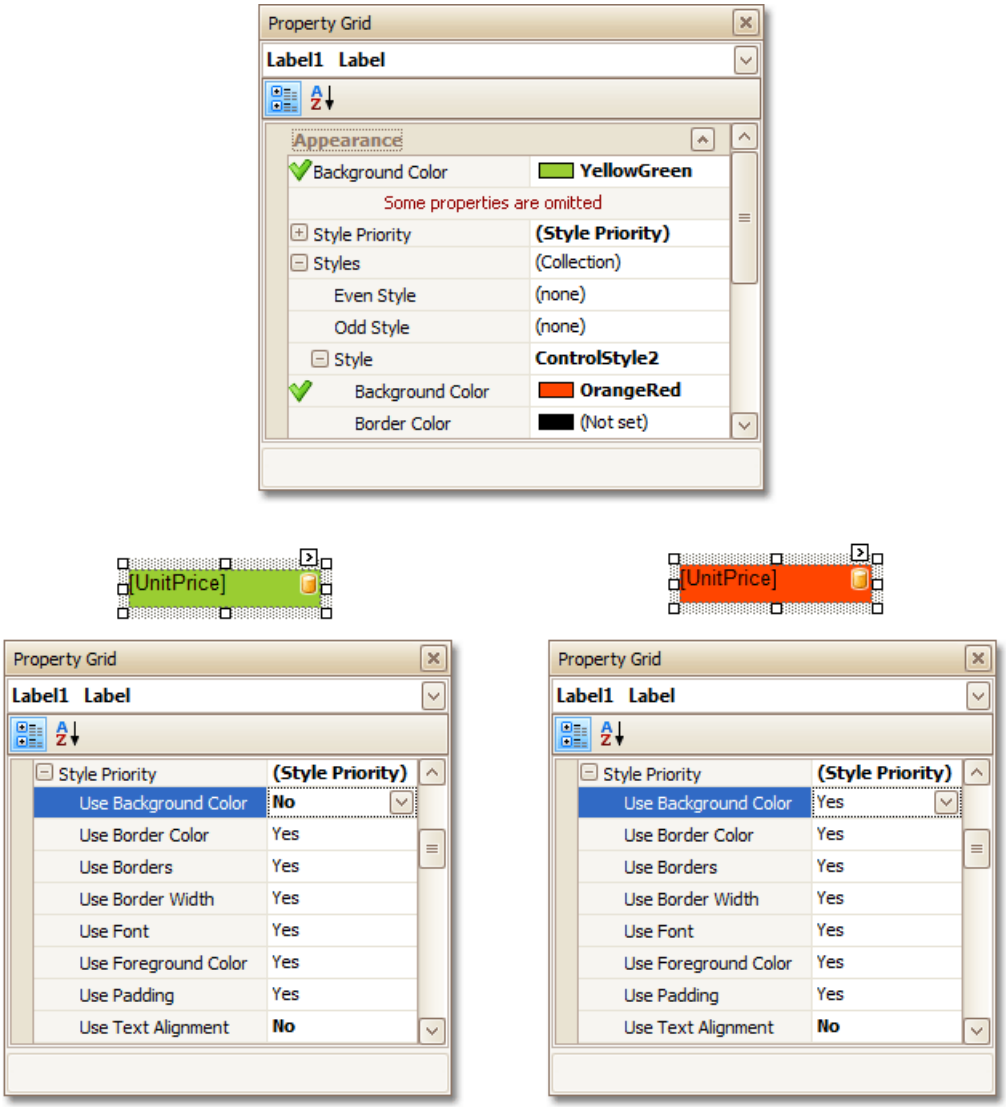
Note: If styles contained in a style sheet loaded in the **Style Sheet Path** property have the same names as styles already contained in a report, the latter ones are overridden.

The following image illustrates how the **Style Priority** property works.



Note: When a conditional formatting is involved, the appearance defined by the conditional formatting has a higher priority than the properties described above.

Another commonly used feature is odd-even styles. It allows you to visually delimit alternating data fields in a report, for better readability. For more information, see *Use odd and even styles*.

How to Use Odd and Even Styles

This procedure describes the steps to create a report using odd and even styles.

1. Create a new report.

   For more information, see *Create Reports*.

2. Drop the required fields from the **Field List** onto the report's **Detail** band.

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3. Select the **Detail** band, and in the **Property Grid**, expand the **Styles** property.
4. On the drop-down list for the **Even Style** property, click **(New)**.
   The xrControlStyle1 setting will be assigned to the **Even Style** property.
5. Expand the **Even Style** property, and set the **Background Color** property to Beige.
   You can configure other properties in this section as required.
6. Repeat steps *3* on page 397 through *5* on page 397 for the **Odd Style** property.
   That is, create a new style and set its **Background Color** property to Ivory.
7. If you switch to the **Preview** tab now, you will see the following result.

   You can observe in the figure that the created styles are applied to all of the controls that are contained in the Detail band.
8. Suppose that a different style is required for one of the fields. To accomplish this, do the following.
   a) Select the required field, and in the **Property Grid** and expand its **Styles** property
   b) Open the drop-down list for the **Style** property, and click **(New)**.
   c) Expand the **Style** property, and for the created **xrControlStyle3**, set the **Background Color** property to **White**.
   d) The style of this control has priority over the Detail band's styles. Switch to the **Preview** tab, and view the result.

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Chai	$18.00
Chang	$19.00
Aniseed Syrup	$10.00
Chef Anton's Cajun Seasoning	$22.00
Chef Anton's Gumbo Mix	$21.35
Grandma's Boysenberry Spread	$25.00
Uncle Bob's Organic Dried Pears	$30.00
Northwoods Cranberry Sauce	$40.00
Mishi Kobe Niku	$97.00
Ikura	$31.00
Queso Cabrales	$21.00
Queso Manchego La Pastora	$38.00
Konbu	$6.00
Tofu	$23.25
Genen Shouyu	$15.50

How to Store and Restore Style Sheets

Follow steps in this procedure to store and restore report style sheets.

Using the Report Designer, it is possible to store a report's style sheet (containing all the report's styles) in an external REPSS file. This makes it possible to easily restore a report's appearance from this file.

1. Create a new report.

   For more information, see *Create Reports*.
2. Click the report's Smart tag, and in the actions list, locate the **Style Sheet** property and click its browse button (**...**).
3. In the **Styles Editor**, click the **Add** button to create new styles.
4. Define properties for the new styles and click the **Save** button.

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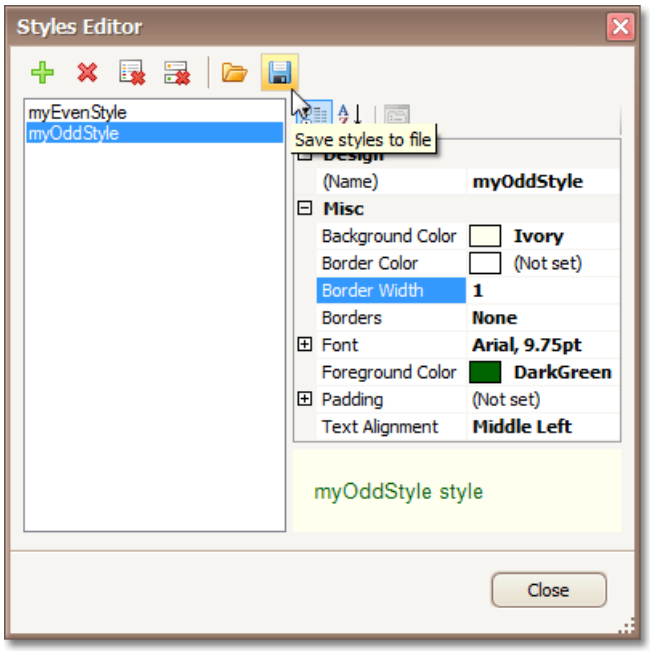

5. In the **Save File** dialog box, define a name for the style sheet file (.REPSS) to be created and click **Save**.
6. Back in the **Styles Editor** dialog box, use the **Delete** button to delete the created styles, and then click **Close**.
7. Select the report, by clicking anywhere over the blank area around its bands.
8. In the **Property Grid**, locate the **Style Sheet Path** property and click its browse button (**...**).
9. In the **Open File** dialog box, load the created REPSS file.

   If you then click the **Style Sheet properties** browse button (**...**) to open the **Styles Editor**, you'll see that the properties of the styles are read-only. This is because we used the **Style Sheet Path** property to load the style sheet.

   If the **Style Sheet Path** property is then set to None, and a style sheet is loaded into a report using the **Style Sheet** property, all the styles loaded from the style sheet file will still be kept in the report, but become editable.
10. Now, assign these styles to the required report controls, by using their **Styles** property.

    In the figure, we assigned the created styles to the control's **Odd Style** and **Even Style** properties. For more information, see *Use Odd and Even Styles*.

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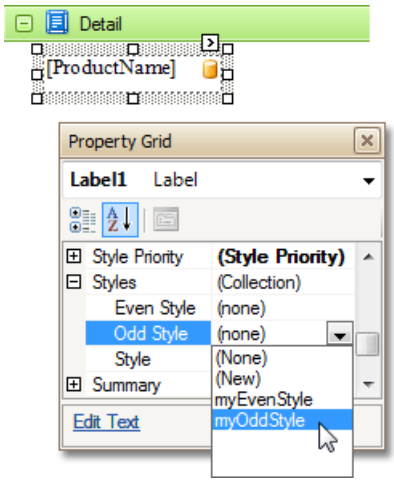

Note: Styles loaded from a style sheet file have a higher priority than the styles which exist in a report's style sheet, returned by the **Style Sheet** property. This means that if the styles stored in the report have the same names as the styles loaded from a style sheet file, then the styles in the file will substitute for their namesakes. And, the styles loaded from a file cannot be edited in a report.

The result of this procedure is shown in the following figure.

How to Conditionally Change the Appearance of a Control

This procedure describes the steps to conditionally change a control's appearance.

1. Create a new report.

   For more information, see *Create Reports*.

2. Drag the required fields from the **Field List** onto the report's **Detail** band.

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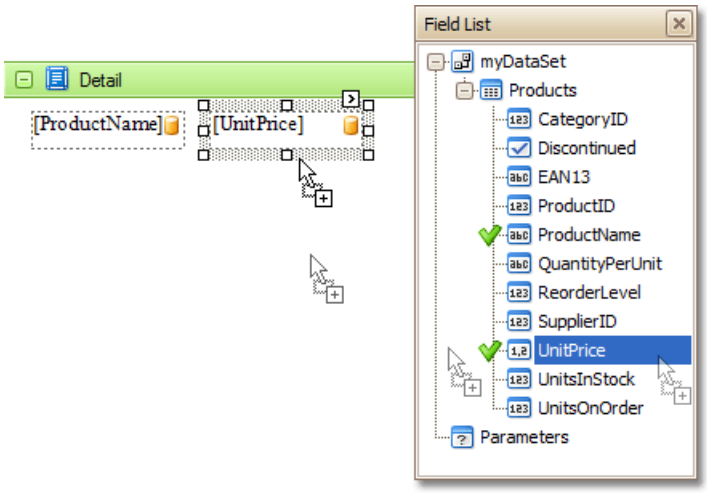
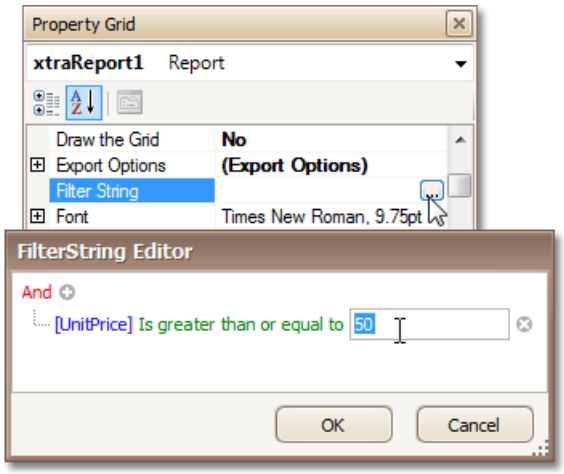


3. Select the report by clicking anywhere over the blank area around its bands, and in the **Property Grid** click the browse button (**...**) for the **Formatting Rules Sheet** property.
   This opens the **Formatting Rule Sheet Editor** dialog box, which you can use to manage and customize formatting rules for the report's bands and controls.
4. In the **Formatting Rule Sheet Editor**, click the **Add** button to create a new formatting rule, and click the browse button (**...**) for the **Condition** property.



5. In the **Condition Editor**, define the required Boolean condition.
   In the figure, fields are formatted if the **UnitPrice** value is greater than **30**.

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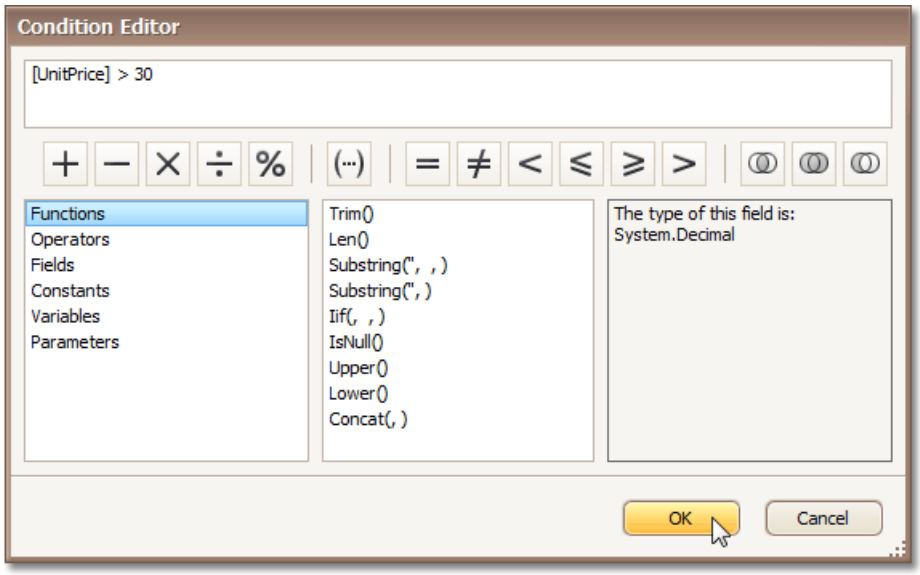
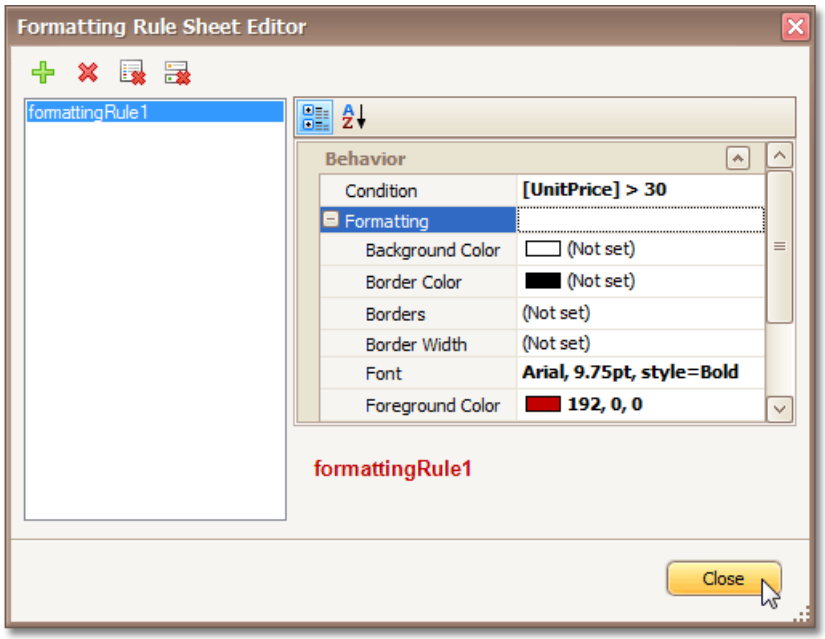


6. Click **OK** to save the condition and close the **Condition Editor** dialog box.
7. Back in the **Formatting Rule Sheet Editor**, define the formatting to be applied.



8. Select the band or control to which to apply the formatting rule (for example, the Detail band), and in the **Property Grid**, click the browse button (**...**) for the **Formatting Rules** property.
9. In the **Formatting Rules Editor**, select the rule and click the **>** button to move the formatting rule from the **Available Rules** box to the **Applied Rules** box.

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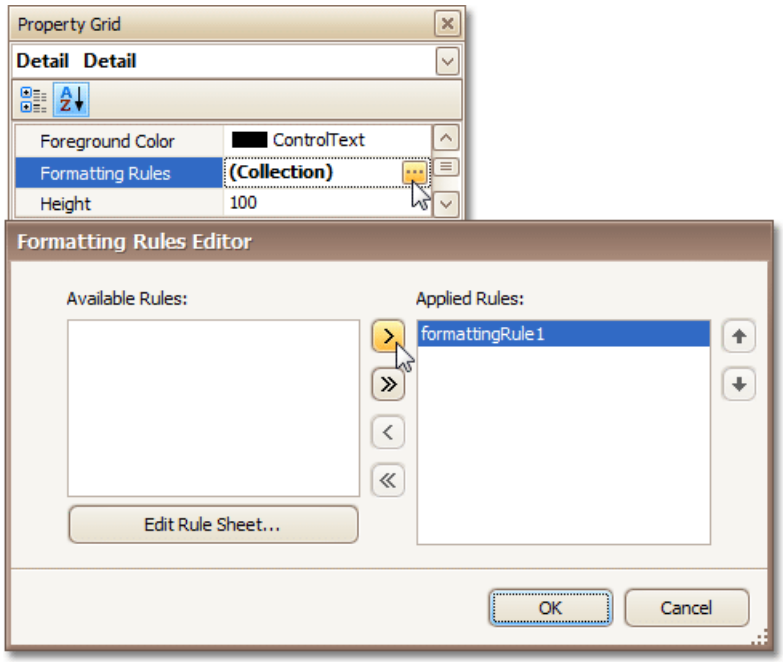

The rules are applied in the same order that they appear in the list. The last rule in the list has the highest priority. You can move a rule up and down the list with the up and down arrow buttons.

The result is shown in the figure.

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How to Conditionally Hide Bands

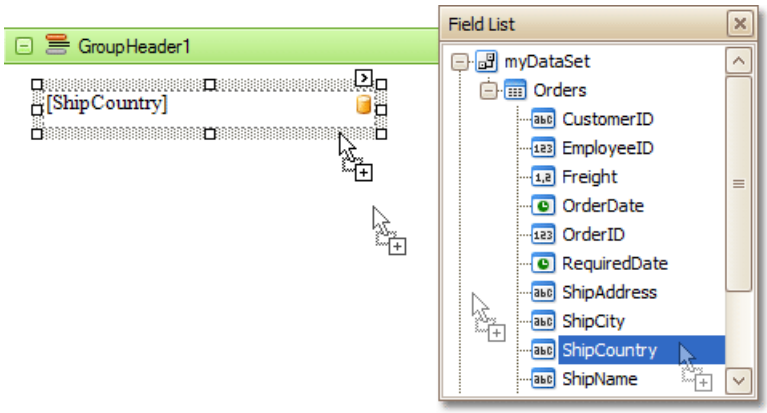
This procedure describes the steps to conditionally hide bands.

In this example, we will hide the **Group Header** and **Detail** bands when a grouping field meets a certain condition. Note that this procedure does not use scripts to accomplish this task.

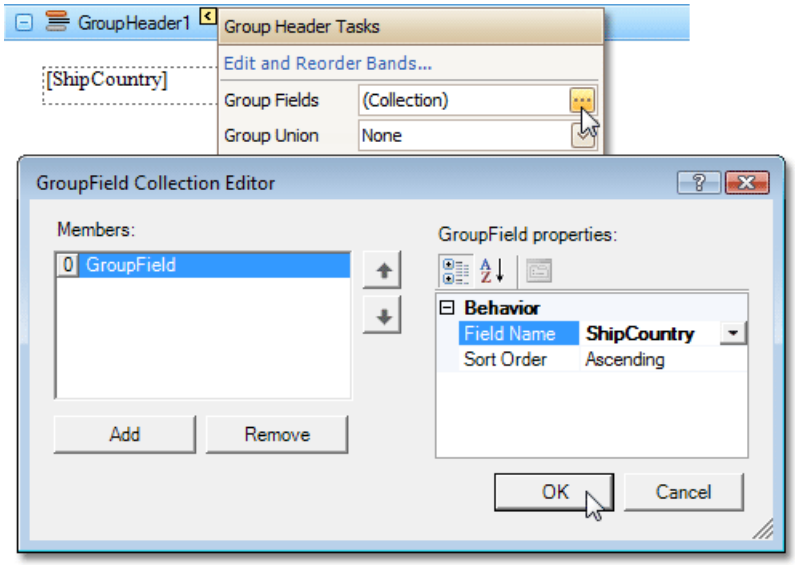
1. Create a new report.

   For more information, see *Create Reports*.
2. Add a **Group Header** band to the report.

   To do this, right-click anywhere over the report's surface, and click **Insert Band** > **GroupHeader**.
3. Drag a field that will be used as a grouping criteria from the **Field List** onto the created **GroupHeader1** band.



4. Click the Smart tag of the **GroupHeader1** band, and in the invoked actions list, click the browse button (**...**) in the **Group Fields** section.
   This opens the **GroupField Collection Editor** dialog box.



5. Click **Add**, to add a new grouping field, and set its **Field Name** property to the required field.
6. Click **OK** to apply the settings and close the dialog box.
7. Drag fields representing the general report's data onto the report's **Detail** band.

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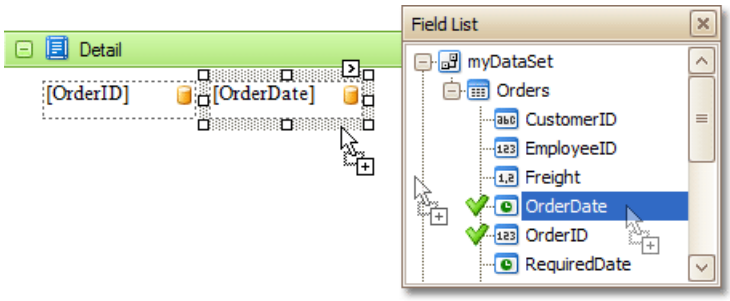
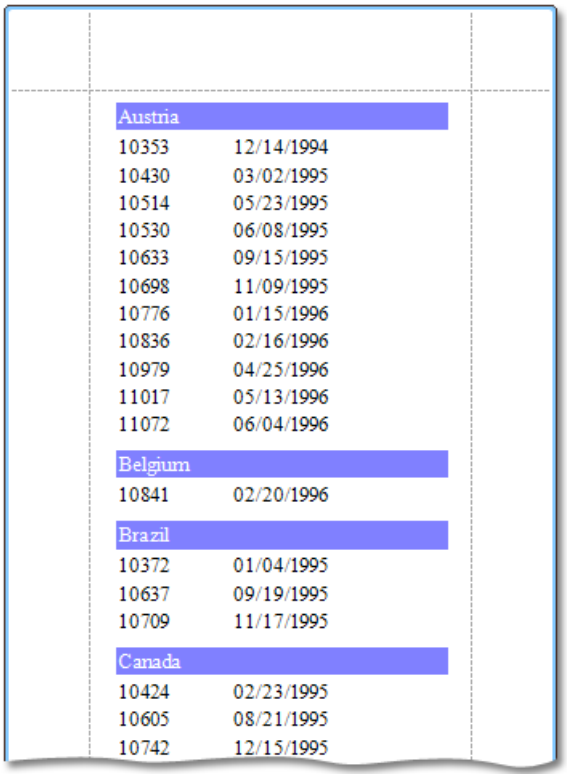


8. Select the **Group Header** band's strip, then in the **Property Grid**, click the **Formatting Rules** browse button.
9. In the **Formatting Rules Editor**, click the **Edit Rule Sheet** button.
10. In the **Formatting Rule Sheet Editor**, click the **Add** button, to create a new rule.
11. Set the new properties **Visible** property to **No**, and for the **Condition** property, click the browse button (**...**).
12. Construct the required Boolean expression to be met (for example, `[ShipCountry] == 'Argentina'`). Then click **OK** and **Close** to close the **Formatting Rule Sheet Editor**.
13. In the **Formatting Rules Editor**, activate the new rule by moving it to the **Applied Rules** box.

    Repeat this step for the report's Detail band (click its **Formatting Rules** property's ellipsis button, and in the invoked dialog, apply the same rule to this band). If you do not do this, the Group Header band will not be displayed when the rule's condition is met while the detailed section of this group will still be visible.
14. Switch to the **Preview Tab** to view the result.
    In the figure, you can see that there is no **Argentina** section in the report, while it's the first record in our database. So, the conditional formatting was applied properly.



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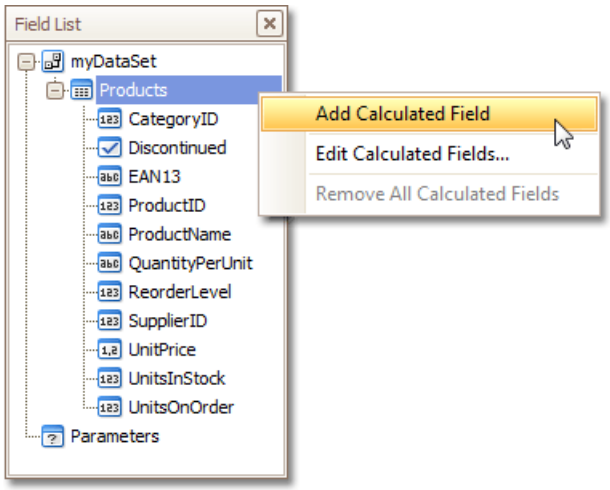
How to Conditionally Change Label Text

This procedure demonstrates how to change label text if a certain condition is met.

1. Create a new report.

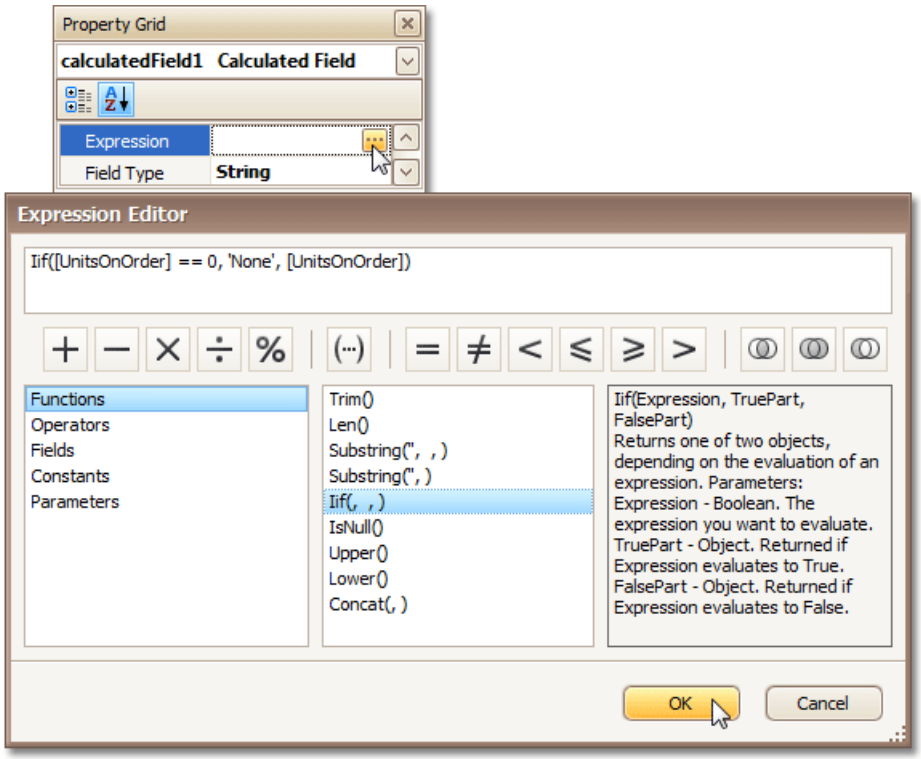
   For more information, see *Create Reports*.

2. In the **Field List**, right-click any item inside the new dataset, and click **Add Calculated Field**.



3. In the **Property Grid**, set the field's **Field Type** property to **String**, then click the browse button (**...**) for the **Expression** property.

   This opens the **Expression Editor** dialog box.



4. In the **Expression Editor** dialog box, define the required condition for the calculated field, and then click **OK**.

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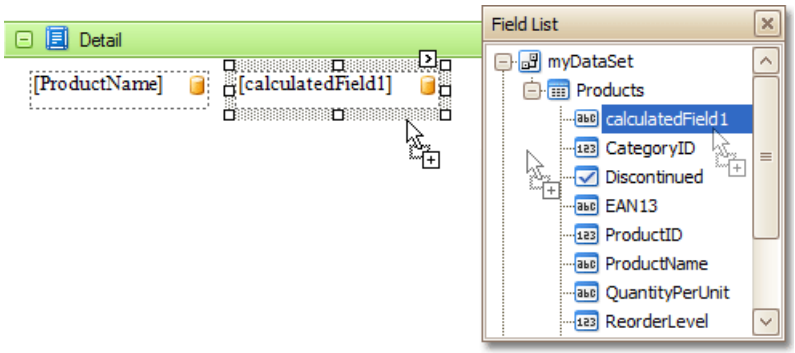
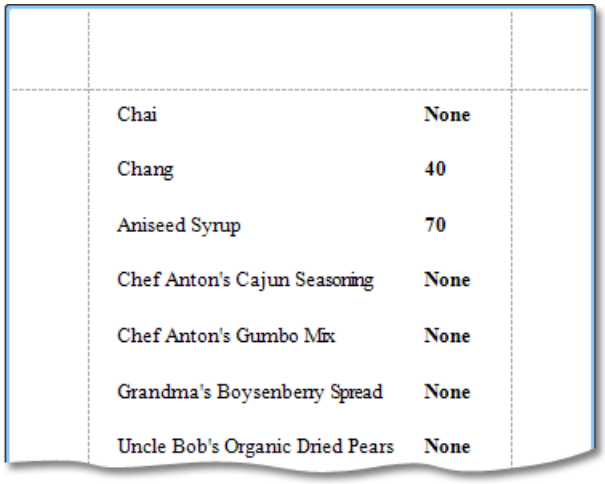
For example, `Iif([UnitsOnOrder] == 0, 'None', [UnitsOnOrder]`, which specifies that if the **UnitsOnOrder** data field's value is equal to **0**, the appropriate control's text will be replaced with **None**.

5. Drag the required data fields (and the created calculated field as well) from the **Field List** onto the report's **Detail** band.



6. The report is now ready. Switch to the **Preview** tab, and view the result.



Navigation in Reports

This topic covers the navigation-related features of the **Report Designer**.

- *Add bookmarks*
- *Create hyperlinks*
- *Add a cross-reference*

How to Add Bookmarks

Follow steps in this procedure to create a report with bookmarks.

This procedure describes the steps to create a report with bookmarks (or a so-called Document Map). This feature allows you to easily navigate through the report during its print preview.

1. Create a new report.

   For more information, see *Create Reports*.

2. Add a **Group Header** band to the report.

   To do this, right-click anywhere over the report's surface, and click **Insert Band** > **GroupHeader**.

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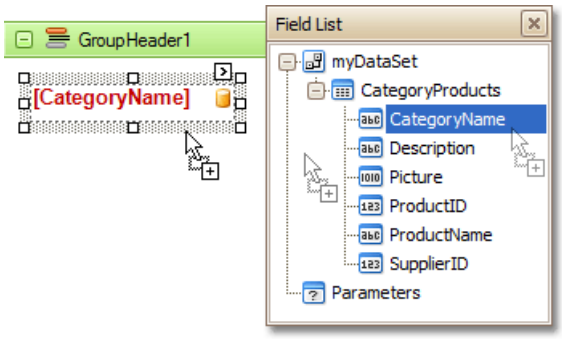
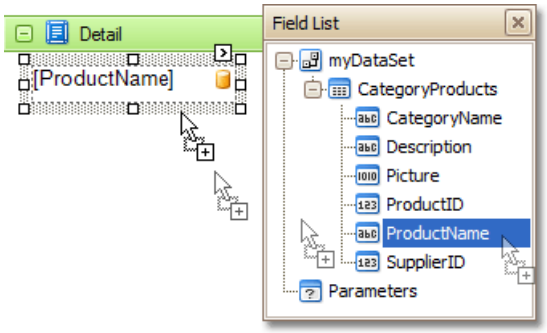
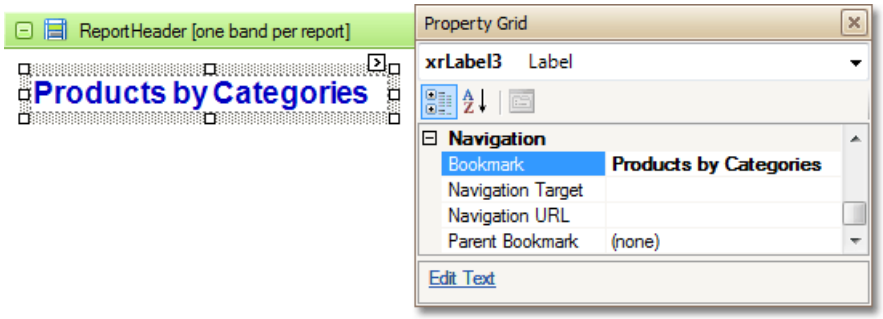
3. From the **Field List**, drag data-fields onto the new **GroupHeader1** band.



4. Click the Smart tag of the **GroupHeader1** band, and in the actions list, click the browse button (**...**) in the **Group Fields** property.
   a) In the **GroupField Collection Editor** dialog box, click **Add** to add a new grouping field, and set its **FieldName** property to the required field.
   b) Click **OK** to apply the settings and close the dialog.
5. To add a **Report Header** band to the report, right-click anywhere on its surface, and click **Insert Band** > **ReportHeader**.
6. Drag a Label from the **Toolbox** panel onto the new Report Header band, and set its text to **Products by Categories**.
7. Drop a field representing the general report's data onto the new Detail band.



8. Click the label in the Report Header band, to select it, and in the **Property Grid**, set its **Bookmark** property to the same value as its text (that is, Products by Categories).



9. Select the label in the report's Group Header band. As this control is bound to data, we will bind its **Bookmark** property to the same data field, using the (Data Bindings) property.

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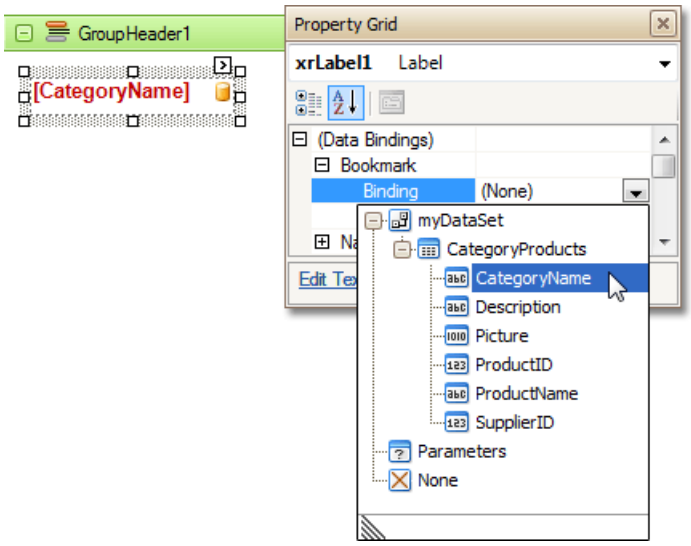
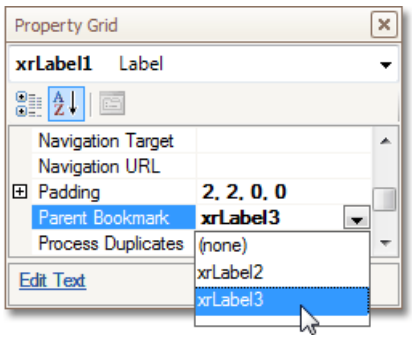


10. For this field, set the **Parent Bookmark** property to the Report Header's label to define the document map hierarchy.



11. The report with bookmarks is now ready. Switch to the **Preview** tab, and view the result.

How to Create Hyperlinks

This procedure demonstrates how to create a hyperlink in a report.

Note: A label will behave as a hyperlink both in a report's Print preview, HTML preview and when the report is exported to PDF, HTML, MHT, RTF and XLS formats.

1. Create a new report.

   For more information, see *Create Reports*.
2. Drag a Label onto the report and change its **Text** to the one which is required for the link.
3. In the **Property Grid**, set its **Navigation Target** property to the required value (_blank, _parent, _search, _self, or _top), and for the **Navigation URL** property, define the URL.

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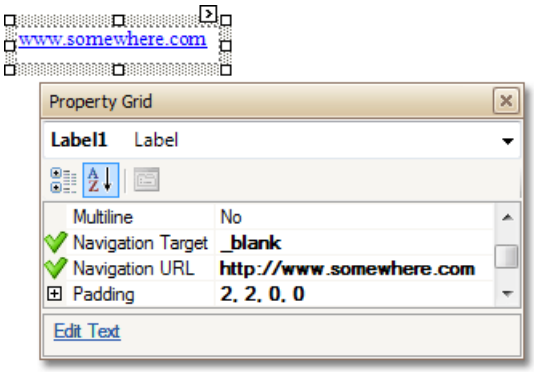


4. The hyperlink is now ready. Switch to the **Preview** tab to view the result.

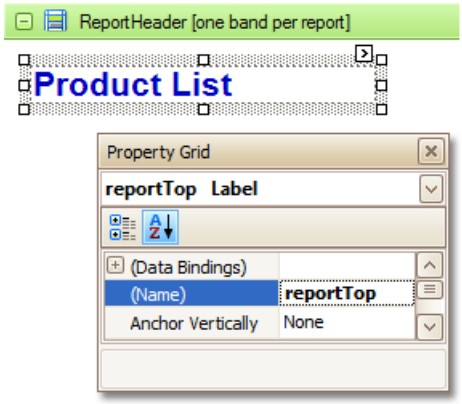
How to Add a Cross Reference

Perform this procedure to create a report with a cross-reference.

A cross-reference is a link whose target is located within the current document. This allows you to establish easy navigation through a report. In this example, we create a grouped report with a link at the bottom of each group, leading to the beginning of the report.

1. Create a report with grouping.

   For more information, see *Change or Apply Data Grouping to a Report*.
2. To add a **Report Header** band to the report, right-click anywhere over the report's surface, click **Insert Band** > **ReportHeader**.
3. Drag a label onto the new **ReportHeader** band to serve as the report's headline. Click the label, to type the desired contents into it. Then, in the **Property Grid**, set its **Name** property to reportTop.



4. Add a **Group Footer** band to the report.

   To do this, right-click anywhere over the report's surface, and click **Insert Band** > **GroupFooter**.
5. Again, drag a label onto the band.

   As the band will be the link, change its text to **Top of Report**, and apply the common formatting to it (blue color and underlined text).
6. Finally, set the band's **Navigation Target** property to **_self**.

   Now, if you click the drop-down list of the **Navigation URL** property, you can see the controls available in your report. Choose the one named **reportTop**.

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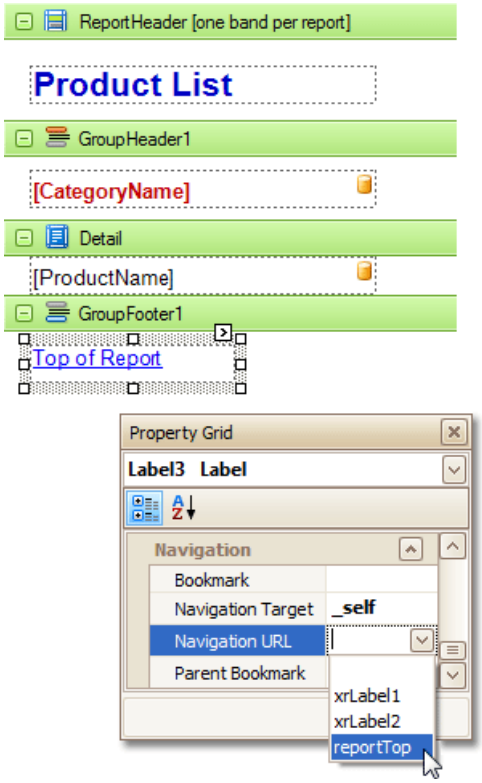

7. The cross-reference is now ready. Switch to the **Preview** tab to view the result.

Miscellaneous Topics in Reports

This topic covers the **Report Designer** features that do not belong in other categories.

- *Show the current row index*
- *Count the number of records in a report or group*
- *Cancel printing if a report does not contain any records*
- *Limit the number or records per page*

How to Show the Current Row Index

Perform this procedure to show the current row index in a report.

1. Create a new report or open an existing one.
   For more information, see *Create Reports*
2. Drag required fields from the **Field List** onto the report's **Detail** band.

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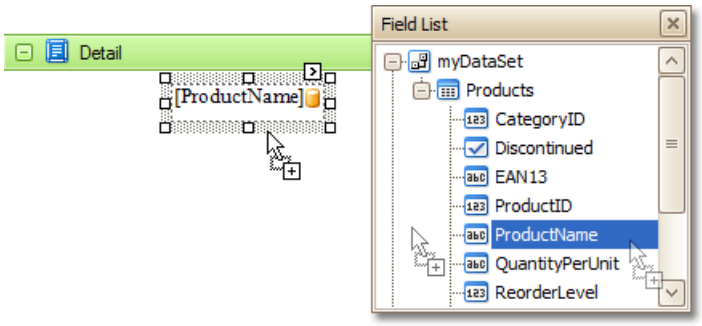
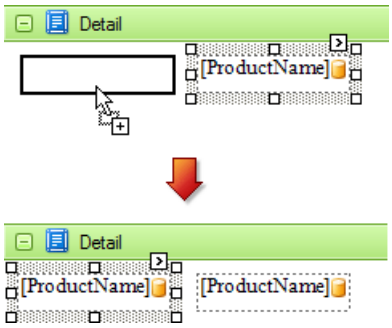


3. To create an exact copy of the Label that will display the index, press Ctrl on the keyboard while you drag the field for which the current row index will be displayed.



4. Select the new Label, and in the **Property Grid**, click the browse button (**...**) in the **Summary** property box.

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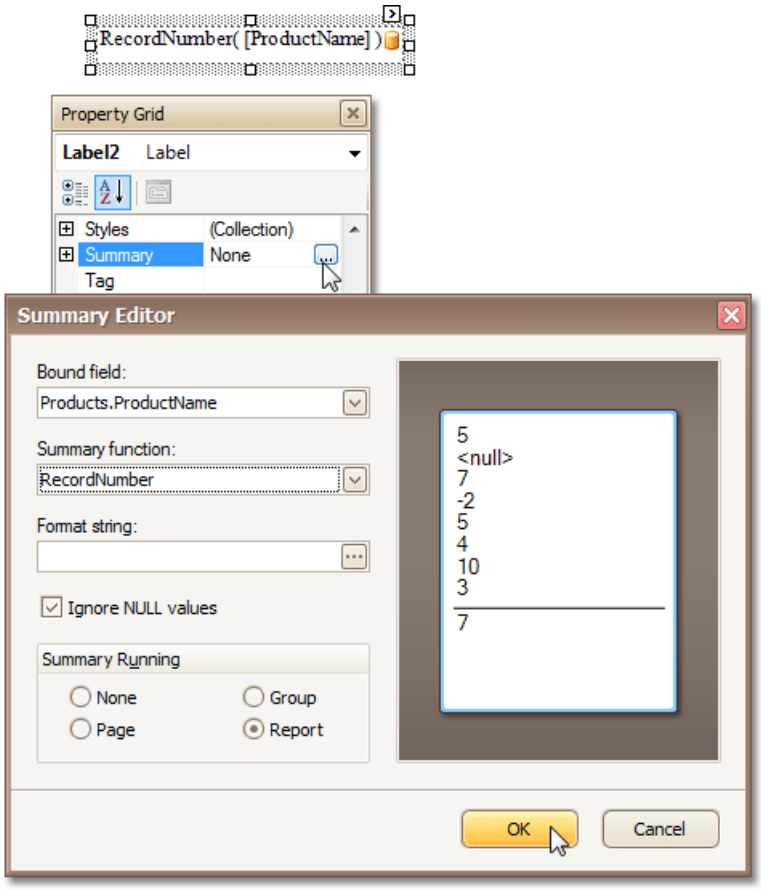

This opens the **Summary Editor** dialog box. In this dialog box, the Bound field is already set to the required data field.

5. For **Summary function**, click RecordNumber.
6. To avoid null data fields from affecting the calculation, select the **Ignore NULL values** check box.
7. Finally, for **Summary Running**, click **Report** (**Group** or **Page** if required)
8. Click **OK** to save your changes and close the dialog box.

How to Count the Number of Records in a Report or Group

Perform this procedure to count the number of records in a report or a group.

1. Create a new report or open an existing one.

   For more information, see *Create Reports*
2. Add a **Report Footer** band to a report.

   To do this, right-click anywhere over the report's area and click **Insert Band** > **ReportFooter**.
3. In the same manner, add **GroupHeader** and **GroupFooter** bands to the report.
4. Drag the required data fields from the **Field List** onto the report bands.

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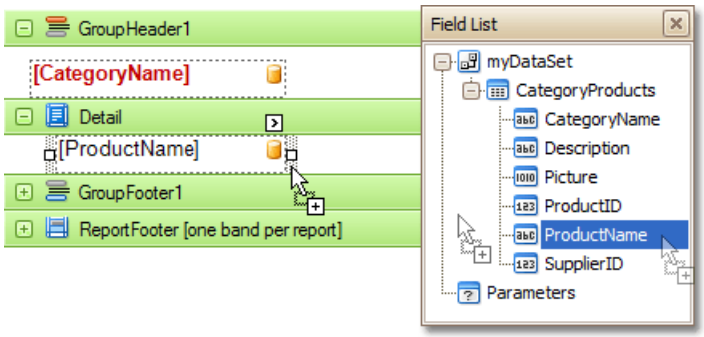
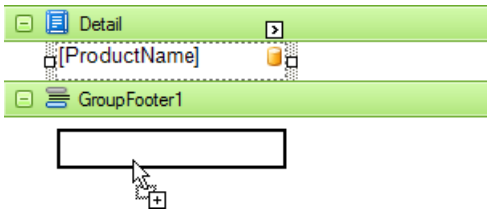
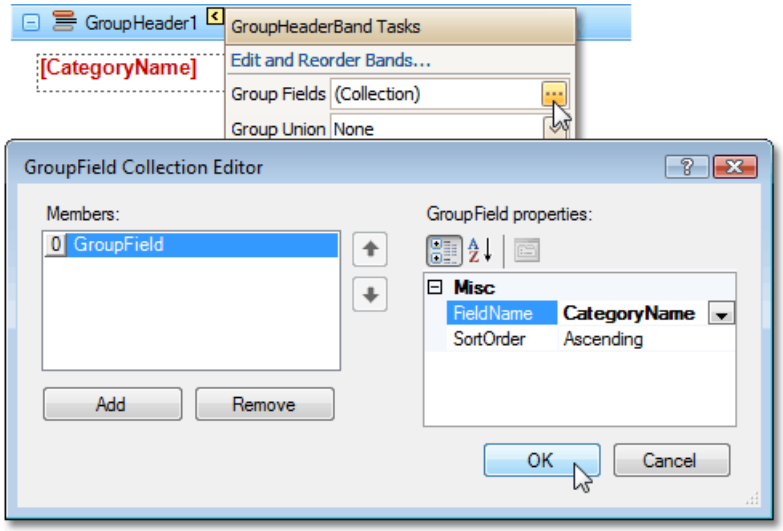


5. To create an exact copy of the Label that will display the number of records for a group, press Ctrl while you drag the field for which the number of records will be calculated onto the Group Footer area.



6. In the same way, create a copy of this field in the Report Footer area to display the number of records for the report.
7. Click the Smart tag of the **GroupHeader1** band, and in the invoked actions list, click the browse button (**...**) in the **Group Fields** box.



This opens the **GroupField Collection Editor** dialog box.

8. Click the **Add** button to add a new grouping field, set its **FieldName** property to the required field, and click **OK**.
9. Select the Label in the Group Footer area, and in the **Property Grid**, expand the **Summary** property.

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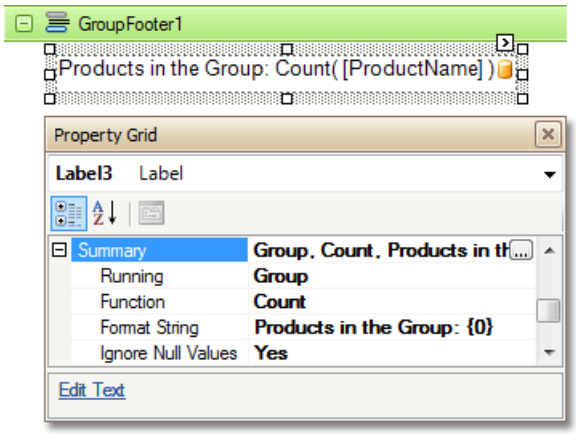
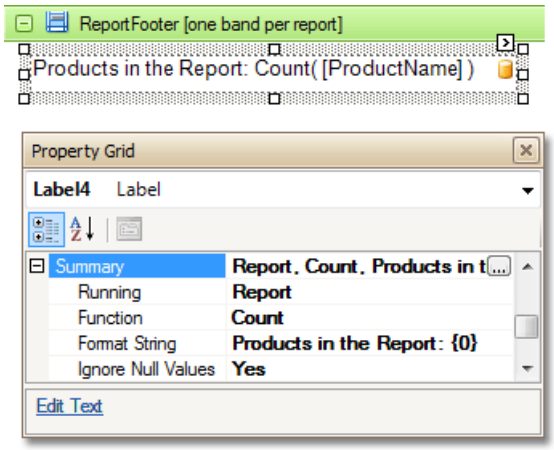


10. Set the **Summary** property values for the Group Footer as follows:

Property	Value
Running	Group
Function	Count
Ignore Null Values	Yes
Format String	Products in the Group: {0}

11. Similarly, select the Label in the Report Footer area, and in the **Property Grid**, expand the **Summary** property.



12. Set the **Summary** property values for the Report Footer as follows:

Property	Value
Running	Report
Function	Count
Ignore Null Values	Yes
Format String	Products in the Report: {0}

13. The report is now ready. Switch to the **Preview** tab and view the result.

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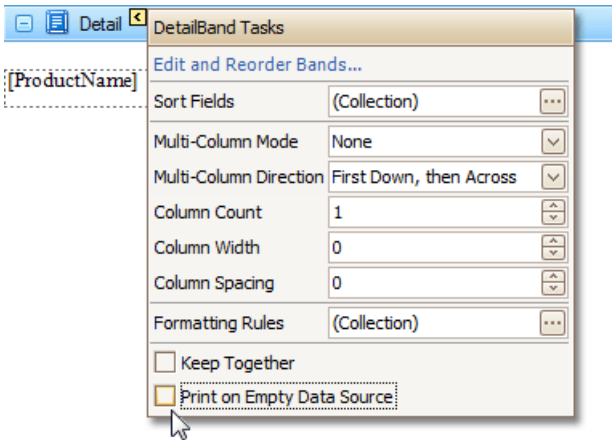
How to Cancel Printing when a Report Does Not Contain Any Records

Perform this procedure to cancel printing for a report that does not contain any records.

- Set the **Detail** band's **Print when Data Source is Empty** property to No.

  Tip: You can quickly perform step this with the band's Smart tag.



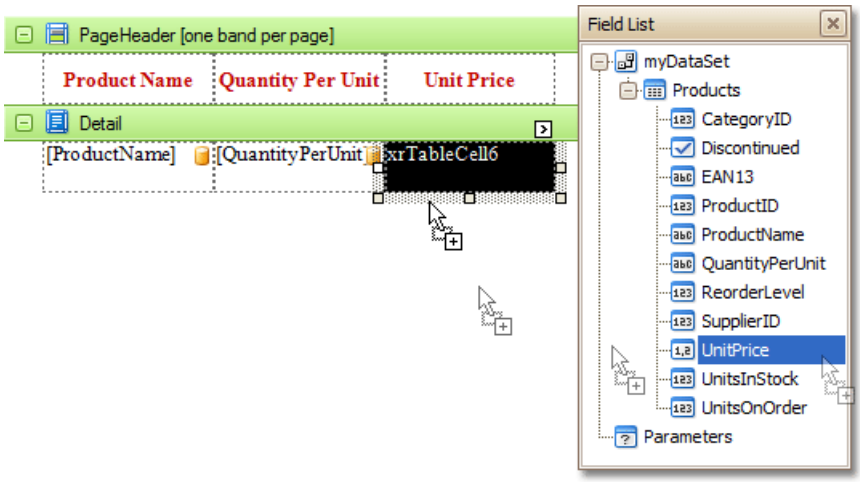
How to Limit the Number of Records per Page

Use this procedure to limit the number of records shown on pages of a report.

This procedure demonstrates how the number of records shown in a report can be limited by means of conditional formatting. In particular, a formatting rule is applied to the **Visible** property of the **Page Break** control. In this example, the number of data rows is passed to the report as a parameter.

1. Create a new report or open an existing one.

   In this procedure, a table report is used as a starting point.



2. To add a parameter to the report, in the **Field List**, right-click the **Parameters** section, and click **Add Parameter**.
3. For the new parameter, set property values as follows:

Property	Value
(Name)	rowsNumber

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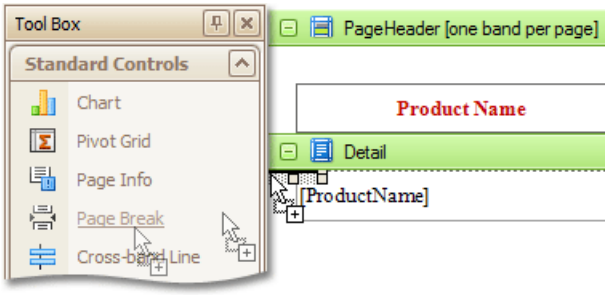
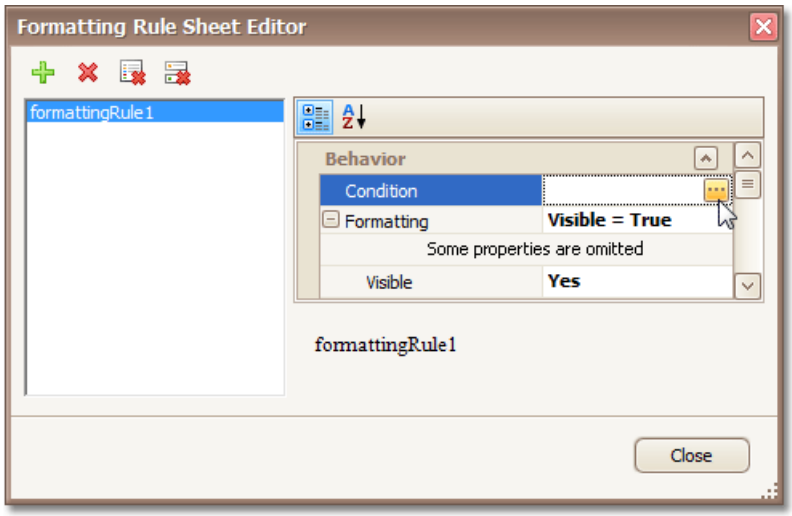
Property	Value
Parameter Type	Int32
Description	Rows per Page:

4. From the **Tool Box**, drag the **Page Break** control onto the report's **Detail** band at the top of the detail table.



5. For the new control, set the **Visible** property to No, and click the browse button (**...**) in the **Formatting Rules** property box to open the **Formatting Rule Editor** dialog box.
6. Click the **Edit Rule Sheet** button to open the **Formatting Rule Sheet Editor**
7. Click the add button (+), to create a new formatting rule.
8. Set The new rules **Visible** property to **Yes**, and click the browse button (**...**) in the **Condition** property box to open the **Condition Editor** dialog box.



9. In the **Condition Editor** dialog box, define the following expression for the rule:
   - `([DataSource.CurrentRowIndex] % [Parameters.rowsNumber] == 0) And ([DataSource.CurrentRowIndex] != 0)`
10. Click **OK** to save the changes and close the dialog box, and then click **Close** to close the **Formatting Rule Sheet Editor**.
11. In the **Formatting Rules Editor**, first select the new rule in the **Available Rules** box, then click the **>** button to move it to the **Applied Rules** box.
12. Click **OK** to close the **Formatting Rules Editor** dialog box.
13. The report is now ready. Switch to the **Preview** tab, and in the **Parameters** section, define the required value, and click **Submit**.

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Resources

Managing Resources

You can manage all Nuance Output Manager resources in the **Resource Manager** dialog box. Resources are available to any Nuance Output Manager service, running on any server. For example, 2 Nuance Output Manager Output Services running on 2 different servers, could use the same resources. The following are the available resource types: CpMillUnitLibrary, CpMillProfile, banner, PrinterControlFile, FCB, CsvDocProp, binary, text, and Ini. Resources are used in business rule and output process actions.

- *Add resources*
- *Modify resources*
- *Remove resources*
- *Import resources*
- *Export resources*
- Configure Resources
  - *CpMillUnitLibrary resource*
  - *CpMillProfile*
  - *Banner resource*
  - *PrinterControlFile resource*
  - *FCB resource*
  - *CsvDocProp resource*
  - *Binary resource*
  - *Text resource*
  - *Ini resource*

How to Add Resources

Complete the steps in this procedure to create Nuance Output Manager resources.

The resources created in the **Resource Manager** dialog box can be used in business rule and output process actions.

1. On the Output Manager Console menu bar click **Tools** > **Resource Manager**.
   This opens the **Resource Manager** dialog box.
2. In the **Resource type** list, select the resource type you want to create.
3. Click **New**. This opens a dialog box that displays options depending on the selected **Resource type**.

Resource	Options
CpMillUnitLibrary	Javascript programs used for Advanced Document Modification. Displays the *Configure Unit Library dialog box*.
CpMillProfile	Text files describing transform configuration data for specific file formats. Displays the *Configure Filter Profile dialog box*.

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Resource	Options
Banner	Text files used for banners or trailers that may contain document properties. Displays the *Banner Resource dialog box*.
PrinterControlFile	Reserved for printer control files, not presently used. Displays the *PrinterControlFile Resource dialog box*.
FCB	Form Control Block used by DCOs for various record conversions. Displays the *FCB Resource dialog box*.
CsvDocProp	Comma separated values representing document properties. Displays the *CsvDocProp Resource dialog box*.
Binary	Binary files used by output process actions. Displays the *Binary Resource dialog box*.
Text	Text files used by output process actions. Displays the *Text Resource dialog box*.
Ini	Displays the *Ini Resource dialog box*.

4. Click **OK**.

How to modify resources

Complete the steps in this procedure to modify a resource.

1. On the Output Manager Console menu bar, click **Tools** > **Resource Manager**.
   This opens the **Resource Manager** dialog box.
2. In the **Resource type** list, select the appropriate resource type.
3. In the grid, select the resource you want to change and click **Modify**.
   The dialog box that opens depends on the type of resource selected.
4. Make the necessary resource changes and click **OK**.
5. Click **OK**.

How to Remove Resources

Complete the steps in this procedure to remove a resource.

1. On the Output Manager Console menu bar, click **Tools** > **Resource Manager**.
   This opens the **Resource Manager** dialog box.
2. In the **Resource type** list, select the appropriate resource type.
3. In the grid, select the resource you want to delete and click **Delete**
4. Click **OK**.

How to Import Resources

Complete the steps in this procedure to import a resource.

1. On the Output Manager Console menu bar, click **Tools** > **Resource Manager**.
   This opens the **Resource Manager** dialog box.
2. In the **Resource type** list, select the resource type you want to import.

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3. Click **Import**.
4. Select the resource file you want to import and click **Open**.

   You can import previously exported Nuance Output Manager resources.
5. The resource will appear in the grid.

   Note: If a resource of that type and name already exists in the grid, the newly imported resource will have a sequence number appended to its name.
6. Click **OK**.

How to Export Resources

Complete the steps in this procedure to export a resource.

1. On the Output Manager Console menu bar, click **Tools** > **Resource Manager**.
   This opens the **Resource Manager** dialog box.
2. In the **Resource type** list, select the resource type you want to export.
3. In the grid, select the resource you want to export.
4. Click **Export**.
5. Choose the location you want to save the resource file and enter a **File name**.
6. Click **Save**.

   Exported resource files contain the resource name, type, description, and the resource data in an XML format.
7. Click **OK**.

Configure Resources

How to Configure the CpMillUnitLibrary Resource

Complete the steps in this procedure to create a unit library.

Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, and page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations. For more information on configuring unit libraries, contact Nuance Communications Professional Services.

1. In the **Configure Unit Library** dialog box, enter the unit library **Name**, **Description**, and any **Comments**.
2. In the **Document Properties Needed** list, select the document properties needed by the unit library.

   These properties will be written to a file called `<filename>.properties` when Nuance Output Manager calls the document modification software. This file can be opened and read in by the unit library.
3. In the **Filters Needed** list, select the filters needed for the unit library.

   Tip: Tips on selecting filters:

   - Select any expected input types and output types
   - If any interim data types are to be used in the script, include those types as well
   - It is recommended to include the NUL file type

   These filters will be written to a temporary location which will be sent to the document modification software.
4. If you want to import the unit resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will display in the **Unit** box.

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5. Under **Unit**, specify the unit library. Enter the unit library code within the `<script> </script>` tags in the appropriate event handler sections.

   Tip: Review the default comments of a new unit library for descriptions of the parameters sent from Nuance Output Manager to the unit library and information about how to tell Nuance Output Manager about the documents modified or created by the unit library.

6. If necessary, click **Reload Variables from Unit** to populate the **Output variables** grid with any output variables defined in the unit library.
7. Click **OK**.

How to Configure a CpMillProfile Resource

Complete the steps in this procedure to configure a filter profile.

1. In the **Configure Filter Profile** dialog box, specify the **Data type** of the filter profile.
2. Enter the resource **Name**, **Description**, and any **Comments**.
3. For a custom filter profile, copy the profile data from the appropriate default CpMillProfile resource for the desired data type. Then modify it as necessary in the new profile being created.

   The **Filter Profile** box, contains the data for the transform software to use during transform operations. We recommend that you copy and modify profile data from an existing profile rather than creating a new profile from scratch.
4. Click **OK**.

How to Configure a Banner Resource

Complete the steps in this procedure to create a banner resource.

1. In the **Banner Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the banner resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the text to be used for the banner data.

   You may also embed document properties and functions within the text using the editor's context menu.

   Note: You may alternately use the Nuance Output Manager BDL (Banner Definition Language) that was employed in the legacy product (Output Manager Print Server). This results in a neatly formed banner page.
6. Click **OK**.

How to Configure a PrinterControlFile Resource

Complete the steps in this procedure to create a PrinterControlFile resource.

1. In the **PrinterControlFile Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.

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4. If you want to import the PrinterControlFile resource data, under **Import Resource Data**, click **Browse** and then select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the control codes for a specific printer to enable or disable features.

   This is normally created using a Hex editor.
6. Click **OK**.

How to Configure an FCB Resource

Complete the steps in this procedure to create an FCB resource.

The forms control buffer (FCB) defines the page layout for output sent to a printer. FCBs apply to laser and impact printers. A default FCB is associated with each form used for printed output.

1. In the **FCB Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.

   Note: The FCB name is important since the FCB selection from the output process or business rule action will select an FCB resource based on the Document Property field used. In most cases the Document.Property.Form Name field is used as the variable in selecting the FCB resource. For example, if you receive a file from the mainframe via RJE the PDIR record is processed and any form name found is mapped to the Form Name document property. Then during conversion, the corresponding FCB resource will be used to format the report. A PDIR form name of CHKS would expect that there was an FCB resource defined named CHKS and would apply the CHKS FCB resource. If the action cannot find the FCB resource it will apply STD.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the FCB resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file.
   The resource data will show in the **Resource Editor** box.
5. In the **Lines/Inch** list, determine the line spacing.

   You can change the value to 8 to tighten the line spacing and enable more data to fit on a page. The default is 6 lines per inch.

   Tip: You can set the top margin by reviewing the **Lines/Inch** value and adding a channel stop at the desired line number. For example, if you want a half-inch top margin and the FCB is configured with the defaults (6 lines per inch, 66 lines per page), you would set channel stop 1 at line 3.
6. In the **Printable lines/page** box, enter the number of lines that will print per page.
   For example, if there are 66 **Lines/Page** and you enter 60 **Printable lines/page**, then you will print lines 1 through 60 on each page of the document.

   Tip: You can set the bottom margin by changing the **Printable lines/page** value. By default the **Printable lines/page** value is equal to the **Lines/page** value. For example, if you want a half-inch bottom margin and the FCB is configured with the defaults (6 lines per inch, 66 lines per page), you would set **Printable lines/page** value to 63 lines per page.
7. In the **Lines/page** box, determine the page length.

   The page length is calculated by multiplying the length of the paper (usually 11 inches) by the number of lines per inch (usually 6). The default is 66 lines per page. This will change the size of the FCB that is sent with the data.
8. To add a channel stop, click **Add**.
   This opens the **Add Channel** dialog box.

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9. Enter the channel stop and line number, and then click **OK**.

   Channel stops must be entered as a decimal value from 1 to 12. To enter hexadecimal values for A, B, and C, enter 10, 11, and 12 respectively. The hexadecimal value is written correctly as 0A, 0B, and 0C when the FCB file is saved.

   Tip: Channel stops are used to define vertical spacing. When a printer encounters a command to advance to a channel stop, the print head moves to the specified line and the data is printed. Channel stop 1 usually indicates the top of the form or the first line where the printer will begin printing.

10. To change the FCB's sort order, click the **Channel** or **Line Number** column headings.
    When you click a column heading, the data of both columns will sort in ascending order based on the column selected.
11. Click **OK**.

How to Configure a CsvDocProp Resource

Complete the steps in this procedure to create a CsvDocProp resource.

1. In the **CsvDocProp Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the CsvDocProp resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will show in the **Resource Editor** box.
5. In the **Resource Editor** box, enter comma separated values (CSV) or text.

   You can also create a resource with a table of information using the CSV format.
6. Click **OK**.

How to Configure a Binary Resource

Complete the steps in this procedure to create a binary resource.

1. From the **Binary Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the binary resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file.
   The resource data will show in the **Resource Editor** box.
5. In the **Resource Editor** box enter the binary data without regard to spacing. The spacing is taken care of automatically by the editor.

   The **Resource Editor** box is a special edit area that accepts only hexadecimal digits (0-9 and A – F).
6. You can enter a number in the **Create Hex Size** box to set the data capacity. This has the following effect:
   - If there is already data in the edit area, any data at or below the new size will remain intact. Any data beyond the new specified size will be erased from the editor.
   - If existing data is smaller than the new size, the space after existing data is padded with empty bytes (00) up to the requested size.

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- If no data currently exists in the editor when setting the size, the editor is filled with empty bytes (00) up to the requested size.

7. Click **OK**.

How to Configure a Text Resource

Complete the steps in this procedure to create a text resource.

1. In the **Text Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the text resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter the text data.
6. Click **OK**.

How to Configure an Ini Resource

Complete the steps in this procedure to create an Ini resource.

1. In the **Ini Resource** dialog box, enter the resource **Name**, **Description**, and any **Comments**.
2. In the **Printer Family** list, use the check boxes to determine if the resource will used for all printer families or only for certain printer families.
3. In the **Data Type** list, use the check boxes to determine if the resource will be used for all data types or only for certain data types.
4. If you want to import the text resource data, under **Import Resource Data**, click **Browse** and select the appropriate resource file. Specify the **Code page** to be used with the resource data.
   The resource data will display in the **Resource Editor** box.
5. In the **Resource Editor** box, enter text, document properties, and functions as necessary.

To	Do this
Insert document properties	Right-click in the box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).
Insert functions	Right-click in the box, click **Insert Function**, and choose the appropriate function. For information on configuring functions, see *Using Nuance Output Manager functions*.

6. Click **OK**.

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Server and Database Administration

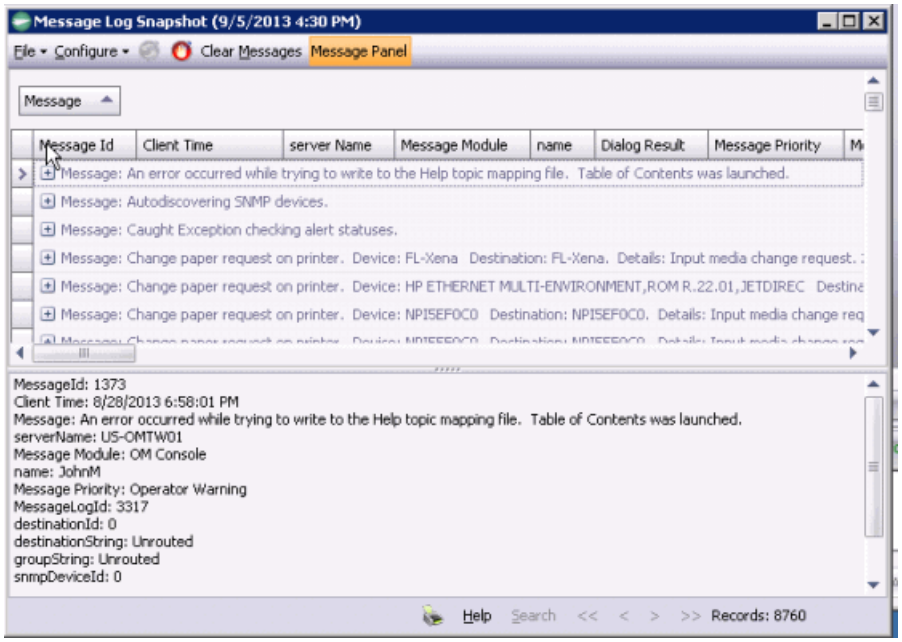
The Message Console

Learning About the Message Console

The **Message Console** can be used to gather information about program activity and to view all messages for a selected destination, source, or document.

To view program activity	Click **Tools** > **Message Console** on the Output Manager Console menu bar. The console will display activity that occurs during normal program operation. The console effectively traces program code by recording a priority level and filtering modules and messages.
To view all messages for a destination, source, or document	In the appropriate grid, right-click a destination, source, or document and click **View messages**. The console will display all messages related to the selected item.

Click the portion of the window you want to learn more about.



1. *Toolbar* on page 426
2. *Message Grid* on page 426

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3. *Status bar* on page 427
4. *Message Panel* on page 427

Toolbar

The toolbar displays below the title bar and provides quick access to commands.

Button	Description
File	Commands on this menu **Open** and **Save** message logs, **Load all** messages, and **Close** the Message Console.
Configure	Specifies the message priority for each program module s and sets the module-specific priority levels of the recor ds that will appear on the console. Records will be displ ayed for selected modules which have a priority level les s than or equal to the value selected. Displays the **Adjust Message Priority** dialog box.
Resume	Resumes scrolling in the **Message Console** window. Use this after the **Pause** option.
Pause	Pauses the console scroll in the **Message Console** windo w. Allows you to pause the console to view messages.
Clear Messages	Clears the message currently displaying in the **Message Console** window.
Message Panel	Displays a message preview panel. Details of the selecte d message will display in the panel.

Message Grid

You can customize the message grid view by sorting, filtering, and grouping by columns. These actions are useful when trying to quickly find messages in the Message Console. You can also add and remove columns and change the order in which the columns display. The messages are sorted by the date and time they are received. The most recent messages appear at the top of the window.

Tip: From the **Message Console**, you can copy and export messages. To copy messages, select the rows you want to copy and then right-click and click **Copy**. You can then paste the contents into Microsoft Excel. This will paste the contents of the entire row. To export specific messages, select the rows you want to export and then right-click and click **Export**. Export the file as necessary from the **Preview** window that displays.

Column	Description
Message Id	A unique identification number for each message.
Client Time	The date and time that an activity occurred.
Message	Details about the activity.
Server Name	The server where the activity occurred.
Message Module	The module name where the activity occurred.
Name	The name of the user who generated the message.

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Column	Description
Dialog Result	This column is only populated for messages that were al so displayed as a message box. The choice that was mad e on the message box (the button that was clicked) displ ays in this column. For these types of messages, you can view the message box text in the **Message** column and t hen view the action the user took in the **Dialog Result** c olumn.
Message Priority	The priority level of the message. Colors are used to repr esent different priority levels. See the following table.

Table 3: Message Priorities

Level	Color	Description
Operator Failure	light red	Errors that halt execution.
Operator Warning	light yellow	Warns of a potential problem.
Operator Information	white	Informs of normal operation.
Support Trace	light orange	Messages for troubleshooting that tra ck normal process flow and protocol execution.
Development Failure	red	Informs programmer of infrequent, b ut important, task.
Development Warning	yellow	Informs programmer of infrequent, b ut less critical, task.
Development Information	gray	Informs programmer of regular oper ation.
Development Trace	orange	Informs programmer of detailed ope ration.

Message Panel

Displays the details of the selected message. Click the **Message Panel** toolbar button to show/hide the message panel. You can also double-click a message in the grid to display the panel.

Status bar

Button	Description
Print	Prints the contents of the console window.
Help	Displays help for the Message Console. The Help windo w incorporates contents, index, search, favorites, and glo ssary tabs to make it easy for you to find answers to you r questions.

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Button	Description
Search	Not currently available.
Navigation	Allows for paging through the grid. Click first page (<<), previous page (<), next page (>), or last page (>>).
Records	Displays the number of messages in the console window.

Using the Message Console

The Message Console gathers information about program activity. The console is used as a tool to record and display activity that occurs during normal program operation. It also generates comprehensive information that can be used by Nuance developers and support staff to troubleshoot program operation if necessary. Once the program begins, data is automatically traced according to defined priorities and servers/modules selected.

- *Capture trace data*
- *View message for a destination, source, or document*
- *Show/hide the message panel*
- *Clear messages from the console*
- *Copy messages to Microsoft Excel*
- *Export/import messages*
- *Pause and resume automatic refresh*

How to Capture Trace Data

To trace activity, select the modules and set the priority level for each module. Records with a priority level less than or equal to the set priority level will display in the **Message Console**.

Warning:

Performance tuning	Setting the priority level higher than Operator Information can cause performance degradation. Because the Message Console continues to process information after you close the utility, you must check the priority level setting before you close. If you experience any problems, we recommend changing the priority level setting to Operator Information.

1. In the Output Manager Console, click **Tools** > **Message Console** to open the **Message Console** utility.
2. On the toolbar, click **Configure**.
   This opens the **Adjust Message Priority** dialog box.

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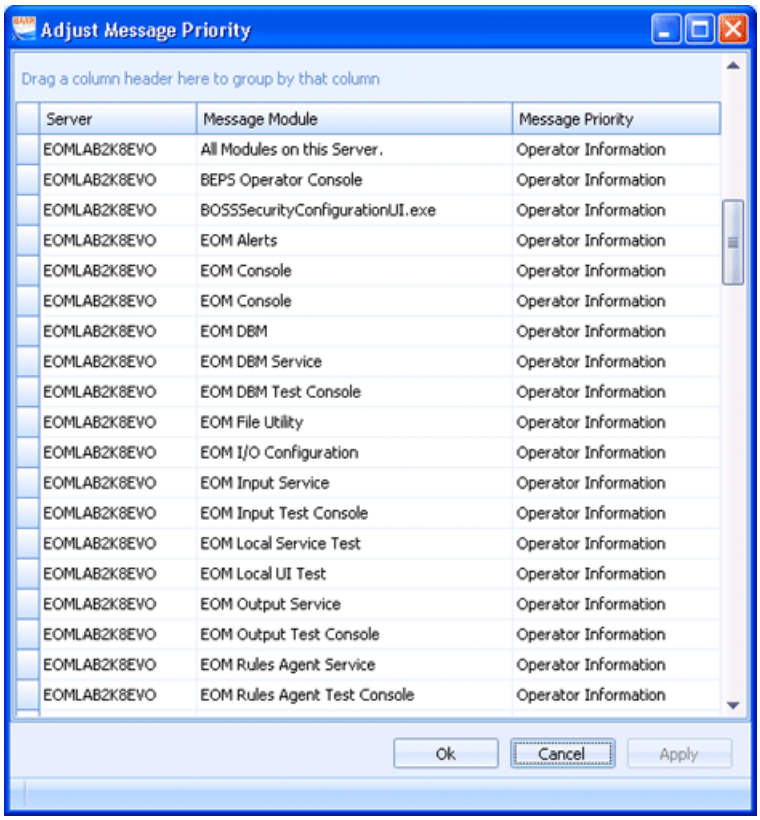

3. Set the priority level for the appropriate modules. The console will display records that have a priority level less than or equal to the selected priority level. There are several ways to set the module's priority level.

To	Do this
To set a module's priority	• Click the **Priority** cell for the appropriate server/module row and select the priority level from the list. **Note:** The **Server** column lists all servers with Nuance Output Manager services installed. For each server, the **Message Module** column lists each module. Use the server/module row to specify a priority for each module on a specific server.
To set all modules on a server to the same priority level	1. In the **Message Module** column locate the **All Modules on this Server** cell for the appropriate server. 2. In that row, click the **Priority** cell and select the priority level from the list. All messages for the selected server to be set to the specified priority level. All of the other rows will remain unchanged in the grid, but the **Message**

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To	Do this
	Console messages will be set at the priority specified in the **All Modules on this Server** row.

4. Click **OK** to save changes close the **Message Priority** dialog box.

How to View Messages for Destination, Source, or Document

Use this procedure to view messages.

From the **Destinations**, **Sources**, or **Documents** grid, right-click the item you want to view messages for and click **View messages**.
The console will display all messages related to the selected item.

How to Show/Hide the Message Panel

Use this procedure to show or hide the message panel in the **Message Console**.

- Click the **Message Panel** toolbar button or double-click a message in the grid.

The message panel will display below the message grid. The details of the selected message will display in the panel.

How to Clear Messages from the Console

Use this procedure to clear messages currently displaying in the **Message Console**.

- Click the **Clear Messages** toolbar button.

How to Copy Messages to Microsoft Excel

Complete the following steps to copy messages and paste them into Microsoft Excel.

1. From the **Message Console** utility, select the rows you want to copy.
2. Right-click in the selected rows and click **Copy**.
3. Open Microsoft Excel and paste the messages.
   Completing this step will paste the contents of the entire row.

How to Export/Import Messages

Use these procedure to export messages or the message log file.

From the **Message Console** you can export specific messages and the message log file. You can also import message log files that were previously exported.

- *Export specific messages*
- *Export a message log file*
- *Import a message log file*

To export/import messages

1. In the **Message Console** utility, select the rows you want to export.
2. Right-click the selected rows and click **Export**.
   This opens the **Preview** window.
3. Export files as needed from the **Preview** window.

To export a message log file

1. On the **Message Console** toolbar, click **Tools** > **Export**.
2. Select the location where you want to save the log file and click **Export**.

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3. Click **OK**.

To import a message log file

1. On the **Message Console** toolbar, click **Tools** > **Import**.
2. In the **Open** dialog box, select the log file you want to import.
3. Click **OK**.

The log file displays in the **Message Console** window.

How to Pause and Resume Automatic Refresh

You can use the toolbar buttons to pause and resume the automatic refresh feature.

The Message Console automatically refreshes to always display newly received messages.

- To pause automatic refresh, click the **Pause** button on the toolbar.
- To resume automatic refresh, click the **Resume** button on the toolbar.

How to Set General Preferences

Use this procedure to configure general administrative options.

The Set General Preferences utility allows an administrator to set operational parameters that apply globally to an instance of Nuance Output Manager. The utility is divided into six tab pages that set **General**, **Destination**, **Security**, **Reporting**, **Kiosks**, and **Client** options.

1. In the Output Manager Console navigation pane, click the **Administration** application.
2. Click the **Set General Preferences** link.
   This opens the **Set General Preferences** utility in the console window.
3. Configure settings on the tabs in this window. You can click in the following table to view options for a table.

Tab	Description
General tab	Sets general options in the preferences.
Destination tab	Specifies which print preferences/document properties are supported throughout Nuance Output Manager.
Security tab	Configures security settings.
Reporting tab	Configures reporting settings.
Kiosks tab	Add, Remove and Configure kiosks associated with devices and optional MFP/Kiosk profiles.
Clients tab	Configures settings for client web servers.

4. Click the **Apply** button to save changes to the general preferences.

System Health utility

This utility shows current status for the Output Manager applications.

The System Health utility is located in the Administration application. It shows the current support status for Output Manager as well as the status for application objects. You can click an of the application boxes in this utility to drill down to the application.

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Option	Description
Manage OM Server	This section shows the system and support agreement st atus for Output Manager. Click the **Manage OM Server** button to open the **Server Manager**. In the **Server Manager** you can perform tasks to manage the Output Manager server.
Destinations	This cell shows status statistics for destinations. The cou nts show numbers of destinations with errors, or that are down, disabled, and online. Click anywhere in this cell to open the **Destinations** application.
Sources	This cell shows status statistics for sources. The counts s hows numbers of sources that are disabled and enabled. Click anywhere in this cell to open the **Sources** applicati on.
Services	This cell shows status statistics for services. The count s shows numbers of services that are online and offline . Click anywhere in this cell to open **Manage Product Components** utility.
Total Documents	This cell shows the number of status of all documents.
Problem Documents	This cell shows the numbers of problem documents.
Database	This cell shows used/free space utilization in the Output Manager database.
Document file stores	This cell status for file stores. • **Location** - The physical path to the file store location. • **Default** - This is selected if a file store is the default file store for the Output Manager server. • **Status** - Shows whether a file store is in use. • **Capacity Remaining** - Shows the percent remaining capacity for the file store. • **Condition** - Shows the color code for the condition of the file store (green, amber, or red).
Other statistics	• Library document count • Output history count • Message console count • Pending job status count

Managing Services through Microsoft Windows

You can use the Microsoft Windows Services utility to manage Nuance Output Manager services. The services appear as follows in the Microsoft Windows **Services** dialog box:

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- Nuance Output Manager DBM Service
- Nuance Output Manager Input Service
- Nuance Output Manager Output Service
- Nuance Output Manager Rules Agent Service
- Nuance Output Manager SNMP Service

See Microsoft Windows documentation for more information on configuring services.

The following topics provide more information on configuring log on credentials for Nuance Output Manager services:

- *Configure services to log on as a system account*
- *Configure services to log on as a user account*

How to Configure Services to Log on Using the Local System Account

Use this procedure to configure Nuance Output Manager services to use the Local System account to log on.

Warning: The account type is specified during installation of the software. If you must change your account type, we recommend you uninstall and then reinstall the software selecting the appropriate account type.

If you are unable to uninstall and reinstall the software, you can also use one the following procedure to configure a service to use the Local System account to log on.

1. Open the Windows Services utility.

   For more information, see *Opening the Windows Services Utility*
2. Right-click the desired Nuance Output Manager service, and then click **Properties**, or select the service and on the menu bar click **Action** > **Properties**.
   This opens the **Properties** dialog box.
3. On the **Log On** tab, under **Log on as**, click **Local System account**, and then click **OK**.
4. Right-click the Nuance Output Manager service, and then click **Start**, or select the service and on the menu bar click **Action** > **Start**.
5. Close the Services utility.

How to Configure Services to Log On Using a User Account

Use this procedure to configure Nuance Output Manager services to use a user account to log on.

Warning: The account type is specified during installation of the software. If you must change your account type, we recommend you uninstall and then reinstall the software selecting the appropriate account type.

If you are unable to uninstall and reinstall the software, you can also use the following procedure to configure a service to log on as a user account.

1. Add the user account as a member of the **Administrators** group.
2. Open the Windows Services utility.

   For more information, see *Opening the Windows Services Utility*
3. Right-click the Nuance Output Manager service, and then click **Properties**, or select the service and on the menu bar click **Action** > **Properties**.
   This opens the **Properties** dialog box.
4. On the **Log On** tab, under **Log on as**, click **This account**, and then type the desired user account name or click **Browse** to select a user account.

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5. In the **Password** and **Confirm Password** boxes, type and confirm the password that is associated with the user account, and then click **OK**.
6. Right-click the Nuance Output Manager service, and then click **Start**, or select the service and on the menu bar click **Action** > **Start**.
7. Close the utility.
8. If this is a network account, grant the user access to the service by setting up DCOM.
   a) On the taskbar, click **Start** > **Run**.
   b) In the **Open** box, type `dcomcnfg`, and then click **OK** to run the Distributed COM Configuration Properties utility (DCOM).
   c) On the **Applications** tab, select the desired spool service, and then click **Properties**.
   d) On the **Identity** tab, click **This user**.
   e) Click **Browse** to select a user that is already defined, or define a new user by entering values in the **User**, **Password**, and **Confirm Password** boxes.
   f) Click **OK** twice.
   g) Restart the desired Nuance Output Manager service through the Microsoft Windows **Services** utility.

   Note: If you are using the Output Manager Print Utility service to access network drives, you do not need to set up DCOM access.

Managing the Output Manager Console License

Procedures in this section describe how to install, activate, and manage licenses for Nuance Output Manager.

Use the *Manage License Utility* to install, activate, and manage licenses for the Nuance Output Manager software. After Nuance Output Manager is installed, you must install and activate the license. Later, the license details such as license file location or the updating of license information can be managed. The Manage License Utility can be used by any Output Manager Console user that has been given permission on the *Security Configuration dialog box*. Nuance Output Manager administrators have permission by default.

The following procedures describe how to install, activate, and deactivate the license.

- *Install the license*
- *Activate the license*
- *Deactivate DBM components/Uninstall the license*

Selecting the license file location

You select a location for the license file; it is not automatically stored at a certain location. Because the license file is so important, choose a location that is memorable and secure. For example, rather than storing the file in the temp folder, you might store it in the application folder (`C:\Program Files\NSi\Output Manager`).

Important: License files cannot be modified. The license file contains a digital signature, and if the file is edited the file will no longer match the digital signature. This is true even if a space is entered and then deleted. The license file can be opened in Internet Explorer or in Notepad without destroying the license functionality, as long as Notepad is closed without saving. If you edit the license file, it will not install. If you edit a license file that is already installed and activated, Nuance Output Manager will no longer function.

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Refreshing license information

In some organizations, more than one person might have the **Manage License Utility** displayed at a time. When an administrator installs a new license, the new license data is displayed on that administrator's screen. If other users have the **Manage License Utility** opened, the new information will be displayed within a minute. If other users want to check the license status immediately click **Refresh** or close and reopen the utility. We recommend administrators notify the other users to refresh the dialog box so they can view the new license data.

How to Install the Output Manager License

Complete this procedure to install an Nuance Output Manager license.

You will typically install the Nuance Output Manager license during the software installation procedure.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage License**.
   This displays the **Manage License Utility** in the right panel.
3. Click **License Wizard**.
   This opens the **License Wizard**.
4. In the **License Operation** dialog box, select **Install and activate a new license**, and click **Next**.
5. In the **License File Installation** dialog box, determine if you want to install the license automatically using an Internet connection or manually by selecting the license file.
   - To install the license automatically, select the radio button next to **Install License Automatically**. An internet connection is required to install automatically. Enter the **License key** for this Nuance Output Manager system.

     Tip: During Nuance Output Manager order processing an Nuance Output Manager license was created that matches the options ordered. The license key was sent in an email to the ordering customer. If you cannot locate your license key, contact Nuance Communications Technical Support or Sales for assistance.
   - To install the license manually, select the radio button next to **Install License Manually**. In the **License file** box, type the path and file name of your license file or click the browse button to locate the file and select it.
6. Click **Next**.
7. In the **License Confirmation** dialog box, confirm the license information is correct and click **Next**.

   Note: The **Next** button will not activate if the **License key** is not recognized.
8. In the **Activate OM License** dialog box, you can choose to activate the software at this time.
   - To activate the software, refer to *Activating the license* to complete the activation.
   - To complete the installation without activating the license, select **Skip activation at this time**, then click **Next**, and **Finish**.

   You can activate the license at a later time using the **License Wizard**.

How to Activate the License

Use one of the procedures in this section to activate a license file.

You can activate all DBM components via the Internet or perform a custom activation by selecting the individual Nuance Output Manager DBM components you want to activate.

1. *Activate all DBM components via the Internet*
2. *Perform custom DBM activation via the Internet*

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3. *Perform custom DBM activation manually*

To activate all DBM components via the Internet

This method will automatically activate all DBM components using an Internet connection.

An internet connection is required to use this method.

1. In the **Activate License** dialog box, click **Activate all DBM components via the Internet**, and click **Next**.
   A confirmation dialog box will display that the activation is complete.
2. Click **Next**, and then click **Finish**.

To perform custom DBM activation via the Internet

This method allows you to activate selected Nuance Output Manager components via the Internet.

An internet connection is required to use this method.

1. In the **Activate License** dialog box, select **Custom DBM activation** and click **Next**.
2. In the **Custom DBM Activation** dialog box, select the Nuance Output Manager DBM components you want to activate.
3. Select the **Use Internet connection** check box.
4. Click **Next**.
   This displays the activation confirmation.
5. Click **Next**, and then click **Finish**.
6. In the **Manage License Utility**, verify that the **License Status** shows the license is activated with the proper version number.

   If some Nuance Output Manager DBM components are activated and some are not, the license status will show **Partial Activation**.

To perform custom DBM activation manually

This method allows you to choose the Nuance Output Manager components you want to activate and activate the license manually. Use this method if you do not have an Internet connection.

1. In the **Activate License dialog box**, select **Custom DBM activation** and click **Next**.
2. On the **Custom DBM Activation dialog box**, select the components you want to activate.

   Important: Do not select the **Use Internet connection** check box.

3. On a computer that is connected to the Internet, open Internet Explorer and browse to the *Notable Solutions Web License (/weblicense.nsiautostore.com)* web page.
4. Click **Activation** in the left column.
5. In the **Product type** list, select **OM**.
6. In the **Serial** box, enter the license serial number.
7. In the **Version** box, enter the Nuance Output Manager software version number.
8. In the **HW Code** box, enter the value from the **Hardware Code** column on the **Custom DBM Activation** dialog box.
9. Click **Get Code**.
10. Copy the activation code and paste into the **Activation Code** column on the **Custom DBM Activation dialog box**.

    This will need to be pasted into the row that corresponds to the **Hardware Code** used in step *8* on page 436.
11. Click **Next**.

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A selection confirmation will display saying which Nuance Output Manager DBM components were selected and the activation method.

12. Click **Next**.
    The activation confirmation will display.
13. Click **Next**, and then click **Finish**.
14. In the **Manage License Utility**, verify the **License Status** shows the license is activated with the proper version number.

    If some Nuance Output Manager DBM components are activated and some are not the license status will show **Partial Activation**.

How to Deactivate DBM Components/Uninstall the License

Use this procedure to deactivate Nuance Output Manager DBM components.

If you deactivate all Nuance Output Manager DBM components, the license will be uninstalled and all Nuance Output Manager processing will stop.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. In the navigation pane, click **Manage License**.
   The **Manage License Utility** is displayed in the right panel.
3. Click **License Wizard**.
   This opens the **License Wizard**.
4. In the **License Operation** dialog box, click **Deactivate DBM components/Uninstall license**, and then click **Next**.
5. In the **Deactivate DBM Components** dialog box, select the components you want to deactivate.

   Deactivating all components will uninstall the license.
6. To deactivate using the Internet, select the **Use Internet connection** check box.

   Important: If you do not deactivate via the Internet, the activation database at Nuance Communications will not be updated. Please contact *Notable Solutions Web License (/weblicense.nsiautostore.com)* directly to keep the license in the correct activation status.
7. Click **Next**.

   A warning message will appear prompting whether you are sure you want to uninstall the license and stop any active Nuance Output Manager operations.
8. Verify all Nuance Output Manager operations have finished, and click **Yes**.
9. A confirmation will display saying the deactivation is complete. Click **Next** and then click **Finish**.

Managing Product Components

From the **Manage Product Components Utility**, you can view the current status of each Nuance Output Manager component. You can also authorize servers and configure services to be monitored from the **OM Console**.

- *View product components*
- *Monitor services from the Output Manager Console*
- *Authorize servers*

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How to View Product Components

Complete the this procedure to view the current product components.

1. From the Output Manager Console navigation pane, select the **Administration** application.
2. Click the **Manage Product Components** link.
   This opens the **Manage Product Components Utility** window.
3. You can review all of the installed Nuance Output Manager components, including status, component type, server for each component.

How to Monitor Services from the Output Manager Console

Complete this procedure to configure Nuance Output Manager services to display in the service status lights in the Output Manager Console.

1. In the Output Manager Console navigation pane, select the **Administration** application.
2. Click the **Manage Product Components** link.
   This displays the **Manage Product Components Utility** in the console window.
3. To enable/disable monitoring, select or clear the appropriate check boxes in the **Monitored** column.

   Monitoring is only available for service components.
4. Click **Apply**.

   Service status lights display to the right of the menu bar.
5. Move the pointer over a service status light to identify the service and status.

How to Authorize Servers

Complete this procedure to authorize Nuance Output Manager servers.

Servers that are not authorized appear in red text in the **Manage Product Components Utility**.

1. In the Output Manager Console navigation pane, click the **Administration** application.
2. Click the **Manage Product Components** link.
   This opens the **Manage Product Components Utility** in the console window.
3. To authorize a server, select the check box in the **Authorized** column.
   This will authorize the server and automatically select the check boxes for all components that are using the server.
4. Click **Apply**.

SSL Certificate Manager

Use the SSL Certificate Manager to configure SSL certificates and bind them to ports for selected web services on Nuance Output Manager server.

See the following topics for more information on configuring SSL for Nuance Output Manager:

Topic	Description
Enable SSL for the Web service on an OM Server	Follow steps in this procedure to enable SSL for the Web service on an Output Manager server.
Disable SSL for the Web service on an OM Server	Follow steps in this procedure to disable SSL for the Web service on an Output Manager server.

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Topic	Description
Assign certificate and binding for OM service port 8069	Follow steps in this procedure to assign certificate and binding for an Output Manager Service port.
Unassign certificate and binding for OM service port 8069	Follow steps in this procedure to unassign certificate and binding for an Output Manager service port.
Simultaneously assign a certificate and bind a port	Follow steps in this procedure to simultaneously assign a certificate and bind a port to enable SSL for the web service on an Output Manager server.
Simultaneously unassign a certificate and unbind a port	Follow steps in this procedure to simultaneously unassign a certificate and unbind a port to disable SSL for the web service on an Output Manager server.

Enabling or disabling SSL for the web service

How to enable SSL for Web service on an OM server

Follow steps in this procedure to enable SSL for the Web service on an Output Manager server.

1. Open the **Output Manager Console**.
   - To do this, on the Windows desktop, click **Start** > **All Programs** > **Output Manager** > **Output Manager Console** > **Output Manager Console**.
2. Verify that the SSL certificate is not already created.
   a) Click the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
   b) Make sure that the **Use SSL** check box is not already selected.
   c) Continue with step *2* if this check box is not selected.
3. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
4. In the **Output Manager Server Configuration Utility** window, click the **SSL Certificate Manager** tab.
5. In the **Choose Certificate** box, choose <New self signed> to create a new certificate.
6. In the **Certificate Password** box, enter a password for the certificate.
   This enters a certificate name in the **Certificate Name** box and displays the **Confirm Password** box.
7. In the **Confirm Password** box, retype the password.

   Tip: Be sure to record the password for future use.
8. In the **Web Service ports** group, in the **Select** column, select the check box for the **Service Key** that you want to use.
9. In the **Port** column, you can edit the port number to change the port number that Output Manager server uses to communicate with the Web service.
10. In the same row of the table, select the **Use SSL** check box.
11. Click the **Generate** button
12. Click the **Output Manager services configuration** tab.

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13. Click the **Select all services** button, and then click **Stop selected services**.
    This changes **Status** for all of the services to Stopped.
14. Click **Start selected services** to start all of the services.
    This restarts all of the services. In the **OM DBM Configuration**, make sure that database server also shows as `Running-SQL connected`.
15. The SSL certificate is now created and functional, so you can close the **Output Manager Server Configuration Utility**.
16. Verify that the certificate was created successfully.
    a) Open the **Output Manager Server Console**.
    b) In the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
    c) In the **Configuration for client web servers** group, confirm that the **Use SSL** check box is selected and that it is shaded and unavailable.

SSL for the Web service was enabled successfully if the **Use SSL** check box is selected and unavailable after you complete this procedure.

How to disable SSL for the Web service on an OM Server

Follow steps in this procedure to disable SSL for the Web service on an Output Manager server.

1. Open the **Output Manager Console**.
   - To do this, on the Windows desktop, click **Start** > **All Programs** > **Output Manager** > **Output Manager Console** > **Output Manager Console**.
2. Verify that the SSL certificate exists.
   a) Click the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
   b) In the **Configuration for client web servers groups**, confirm that the **Use SSL** check box is selected and shaded.
3. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
4. In the **Output Manager Server Configuration Utility** window, click the **Output Manager services configuration** tab.
5. **Start** the services if they are stopped.
   - To do this, select the **Selected** check box services that show Stopped in the **Status** column, and then click the **Start selected service** button.

     Notice: In the **Web service ports** box, the **Use SSL** check box is selected for the **Service Key** that you want to configure.
6. Click in the **Choose Certificate** box, and click the <browse> item in the list.
7. In the **Open** dialog box, select the certificate that was used to enable SSL, and click **Open**.
8. In the **Certificate Password** box, enter the password for the certificate.
9. In the **Web service ports** list, select the **Select** check box for the **Service Key** that you want to configure.
10. Clear the **Use SSL** check box for the **Service Key**.
11. Click the **Un-assign** button to unassign the certificate from the selected **Service Key**.
    After you complete this step, the utility should display a status message at the bottom of the tab:

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Status: The SSL certificate has been successfully unassigned.

12. Click the **Reset** button.
    This hides the **Use SSL** button for the selected **Service Key**.
13. Click the **Output Manager services configuration** tab.
14. Click the **Select all services** button, and then click the **Stop selected services** button.
    This changes the **Status** for all of the services to Stopped.
15. Click **Start selected services** to start all of the services.
    This restarts all of the services. In the **OM DBM Configuration**, make sure that database server also shows as `Running-SQL connected`.
16. Click on the **OK** button to close the **Output Manager Server Configuration Utility**.
17. Verify that the certificate was deleted successfully.
    a) Open the **Output Manager Server Console**.
    b) In the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
    c) In the **Configuration for client web servers** group, confirm that the **Use SSL** check box is cleared and not shaded.

SSL for the Web service was disabled successfully if the **Use SSL** check box is cleared and available after you complete this procedure.

Assigning or Unassigning a Certificate for a service port

How to assign certificate and binding for an Output Manager service port

Follow steps in this procedure to assign certificate and binding for an Output Manager Service port.

1. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
2. Click the **SSL Certificate Manager** tab.
3. In the **Web service ports** box, verify that there is no SSL certificate created for the **Service Key** that you want to configure.
   - The **Use SSL** check box will be cleared for the **Service Key**.
4. In **Output manager service ports**, in the **Ports to bind** list, select the check box next to the port that you want to bind to the Output Manager service.
5. In the **Choose Certificate box**, click <New Self Signed> to create a new certificate.
6. In the **Certificate Password** box, type the password that you want to use for the certificate, and then type it again in the **Confirm Password** box.

   Tip: Make sure that you record the password for future use.
7. Click the **Generate** button.
   The certificate is now bound to the selected Output Manager service port.
8. Click the **Output Manager services configuration** tab.
9. Click the **Select all services** button, and then click **Stop selected services**.
   This changes **Status** for all of the services to Stopped.

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10. Click **Start selected services** to start all of the services.
    This restarts all of the services. In the **OM DBM Configuration**, make sure that database server also shows as `Running-SQL connected`.
11. Click the **OK** button to save your changes and close the **Output Manager Server Configuration Utility**.

How to unassign certificate and binding for an Output Manager service port

Follow steps in this procedure to unassign certificate and binding for an Output Manager service port.

1. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
2. Click the **SSL Certificate Manager** tab.
3. In the **Web service ports** box, verify that there is no SSL certificate created for the **Service Key** that you want to configure.
   - The **Use SSL** check box will be cleared for the **Service Key**.
4. In **Output manager service ports**, in the **Ports to bind** list, select the check box next to the port that you want to unbind from the Output Manager service.
5. In the **Choose Certificate box**, click <browse> and select the certificate that was bound to the selected port.
6. In the **Certificate Password** box, enter the password for the certificate.
7. Click the **Un-assign** button.
   At the bottom of the tab, the status message should show
   Status: The SSL certificate has been successfully unassigned.
8. Click the **Output Manager services configuration** tab.
9. Click the **Select all services** button, and then click **Stop selected services**.
   This changes **Status** for all of the services to Stopped.
10. Click **Start selected services** to start all of the services.
    This restarts all of the services. In the **OM DBM Configuration**, make sure that database server also shows as `Running-SQL connected`.
11. Click the **OK** button to save your changes and close the **Output Manager Server Configuration Utility**.

Simultaneously assigning/unassigning a certificate and binding/unbinding a port

How to simultaneously assign a certificate and bind a port to enable SSL

Follow steps in this procedure to simultaneously assign a certificate and bind a port to enable SSL for the web service on an Output Manager server.

1. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
2. Click the **SSL Certificate Manager** tab.
3. In the **Choose Certificate** box, choose <New self signed> to create a new certificate.

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4. In the **Certificate Password** box, type a password for the certificate, and in the **Confirm Password** box, retype the password.

   Tip: Be sure to record the password for future use.

5. In **Output manager service ports**, in the **Ports to bind** list, select the check box next to the port that you want to bind to the Output Manager service.
6. In **Web Service ports**, select the check box in the **Select** column for the **Service Key** that you want to configure.
7. In the **Port** column, enter the port number that you want to use, and then select the check box in the **Use SSL** column.
8. Click the **Generate** button.
   The SSL certificate is created for the web service and bound to the selected service port.
9. Click the **Output Manager services configuration** tab.
10. Click the **Select all services** button, and then click **Stop selected services**.
    This changes **Status** for all of the services to Stopped.
11. Click **Start selected services** to start all of the services.
    This restarts all of the services. In the **OM DBM Configuration**, make sure that database server also shows as `Running-SQL connected`.
12. Click the **OK** button to save your changes and close the **Output Manager Server Configuration Utility**.
13. Verify that the certificate was created successfully.
    a) Open the **Output Manager Server Console**.
    b) In the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
    c) In the **Configuration for client web servers** group, confirm that the **Use SSL** check box is selected and that it is shaded and unavailable.

SSL for the Web service was enabled successfully if the **Use SSL** check box is selected and unavailable after you complete this procedure.

How to simultaneously unassign a certificate and unbind a port

Follow steps in this procedure to simultaneously unassign a certificate and unbind a port to disable SSL for the web service on an Output Manager server.

1. Open the **Output Manager Server Configuration Utility**.
   - To do this, right-click **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**, and click **Run as administrator**.

     Running the utility as an administrator ensures elevated privileges required to write all information correctly to the system registry.
2. Click the **SSL Certificate Manager** tab.

   In **Web service ports**, notice that the **Use SSL** check box is selected for the **Service Key** that you want to configure.
3. In the **Choose Certificate** box, choose <browse>.
4. In the **Open** dialog box, select the certificate that was used for enabling SSL, and then click the **Open** button.
5. In the **Certificate Password** box, enter the password for the certificate.
6. In **Output manager service ports**, in the **Ports to bind** list, select the check box next to the port that you want to unbind from the Output Manager service.
7. In **Web Service ports**, select the check box in the **Select** column for the **Service Key** that you want to configure.
8. Clear the check box in the **Use SSL** column.

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9. Click the **Un-assign** button.
   The status message at the bottom of the tab should show:
   Status: The SSL certificate has been successfully unassigned.
10. Click the **Reset** button.
    The **Use SS** check box is no longer visible after you complete this step.
11. Verify that the certificate was deleted successfully.
    a) Open the **Output Manager Server Console**.
    b) In the **Administration** application, click **Set General Preferences**, and then click the **Clients** tab.
    c) In the **Configuration for client web servers** group, confirm that the **Use SSL** check box is not selected and that it is available.

SSL for the Web service was disabled successfully if the **Use SSL** check box is not selected and available after you complete this procedure.

Back Up and Restore the Output Manager Database

You can configure Nuance Output Manager to backup and restore the Nuance Output Manager database. You should make periodic database backups in case something causes the Nuance Output Manager database to become unusable. If necessary, you could restore your database from a list of backups according to the date the backup was completed.

- *Schedule periodic backups*
- *Restore a backup*
- *Back up files from the command prompt*

How to Schedule Periodic Backups

Complete the steps in this procedure to automate the database backup.

The Windows Scheduled Tasks utility automates the process of periodically performing SQL database backups using the Nuance Output Manager command line backup utility (`OmBackupDatabase.exe`).

1. Open the Windows **Scheduled Tasks** utility. Click **Start** > **All Programs** > **Accessories** > **System Tools** > **Scheduled Tasks**.
2. On the menu bar, click **File New Scheduled Task**.
   A new task will display in the grid.
3. Type a name for the task.
   For example, `Backup Output Manager Database`.
4. Complete the following steps to configure the task.
   a) Double-click the new task or right-click the task and click **Properties**.
   b) On the **Task** tab, enter the command line in the **Run** box.

      The following is an example command:

      ```
      EomBackupDatabase -database=EOM_2.0.604.4 -Server=Serverxp2 -Folder="C:\Program Files\NSi\Output Manager\Database\Backup" -Keep=10
      ```

      Test the command from a command prompt first to verify you get the expected results. See *Back up from a Command Prompt*.
   c) In the **Start in** box, enter the folder where the program is located (`C:\Program Files\NSi\Output Manager`).
   d) In the **Run as** box, enter the appropriate user information.

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e) Click **Set password** and enter and confirm the password for the user in the **Run as** box.

f) On the **Scheduled** tab, set the desired schedule.

Creating a SQL backup puts some load on SQL Server, so you should scheduling the backup during periods when there is low demand on the system.

5. Click **OK**.

The task will appear in the grid. The **Next Run Time** column will display the date and time the backup will be performed.

Restore a Backup

Complete the steps in this procedure to restore a database using SQL Server Management Studio.

The database version must match the product version. Under some circumstances a previous version of the database can be restored and then upgraded using the database creation utility. Typically, however, the most recent backup will result in minimal data loss. Backups of older data from previous versions will represent result in the greatest data loss.

1. Stop all Nuance Output Manager services that use the database.
2. Open SQL Server Management Studio to restore the database from a backup file.
3. Right-click the **Databases** folder and click **Restore Database**.
4. In the **To database** box, select the database you want to restore or type the name in the box.
5. Select **From device** and browse to the desired backup file.

   You will normally want to select the latest backup file unless there is a configuration problem you are trying to avoid.

   The file will show in the **Select the backup sets to restore** grid.
6. In the grid, select the check box next to the database you want to restore.
7. Click **OK**.
   SQL Server Management Studio will show success or failure.
8. After the database is restored successfully, restart the Nuance Output Manager services.

Any configuration or activity that occurred after the backup was performed will be lost. The documents and their respective states will only be current as of the backup date and time.

How to Back Up from a Command Prompt

Use this procedure to perform a backup from the Windows command prompt.

You can use the `OmBackupDatabase.exe` command line utility to manually backup an SQL database to a folder. You can enter parameters to limit the number of backup files that will be saved by deleting the oldest backups. The following table lists the available parameters. Executing the command without any parameters causes it to display usage information.

1. Open a Windows command prompt windows.
2. Enter the following command at the command prompt to perform a backup.
   - `EOMBackupDatabase.exe` – `Database` = *database_name* – *optional_parameters*
3. After the database name, you can type any of the parameters listed in the following table. Separate parameters with a space.

Parameter	Description
– `Database` = *database_name*	Specifies the database. This parameter is required.

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Parameter	Description
- Server = *SQLServer / instance*	Where *SQLServer / instance* is the instance name of SQL Server where the database is located. The default server is `localhost\SqlExpress`. The server name is required if SQL Server is installed on a different computer from where the backup is being performed and SQL Express is not being used. An instance name is not used for the default instance of SQL Server, but the instance name is required to specify a named instance of SQL Server. By default, SQL Express installs a named instance with the instance name of SQLEXPRESS.
- Folder = *backup_folder*	Where *backup_folder* is the path for the backup folder. If the location does not exist, the folder will be automatically created. File shares and any path containing spaces must be enclosed between quotation marks ("). If a backup folder is not specified, the backup file will be saved in the default path for the installation, for example `C:\Program Files\NSi\Output Manager\Database\Backup`. The backup file will be saved with a unique file name using the database name, date, and time. This makes it easy to see when a backup was created. If you want to configure the software to automatically purge older backup files, always use the same backup folder. Using a folder on another computer will provide additional security that data will not be lost due to a disk failure at the cost of additional network usage
- Keep = *number*	Where *number* is the maximum number of backups to keep in the backup folder. After a backup is performed for a database, the backup files are sorted and the oldest files are deleted until the number of files to keep is reached. The default number of backup files to be kept is 30. To disable purging, specify `Keep=0` . This will retain all backup files.

How to configure NetWeaver integration

Perform this procedure to configure NetWeaver integration.

In the **Configure NetWeaver Integration Utility**, you can enable and configure properties for SAP NetWeaver integration in Output Manager. You can enable multiple NetWeaver servers in Output Manager.

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1. To add a NetWeaver server for integration with Output Manager, configure settings in each column of the first empty row.

Option	Description
Name	The name of the Output Manager Remote Function Call (RFC) server.
Enabled	Select this check box to enable the Output Manager RFC server.
Application Server	The SAP application server host name or IP address that the RFC service will use to communicate with SAP NetWeaver.
System Number	The SAP application server host system number.
Callback Instance	The name of the RFC callback instance corresponding to the SAP callback receiving server.
Client	The client identifier to use for communicating with the SAP application server.
User Name	User name that is authorized for the connection between the RFC server and the SAP application server.
Password	The password associated with the specified **User Name**.
Real OMS	The name of the SAP *Real OMS* configured in SAP that provides the printing link between SAP and Output Manager.
Gateway service	The name of the SAP gateway service utilized for this RFC service communication.
OM Responds Via Callback	Select this check box to specify that Output Manager actively posts status updates to SAP through the RFC service. If you clear this check box, then SAP must utilize polling calls for status updates.
Description	Provides space to describe the Output Manager RFC server.

2. When all of the properties are configured, click **Apply** to save your changes.

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User Interface Reference

@DateTimeToString dialog box

Use this dialog box to configure the `@dateTimeToString` function. This function converts a date/time (usually from another document property) to a string in the format specified. This string will be inserted in the document property you are configuring.

Once created, the function command syntax is as follows,

`@dateTimeToString` (*FieldSource* , *Format*)

`@dateTimeToString` (*FieldSource* , *Format* , *Culture*)

FieldSource

Specifies the document property that contains the date/time string you want to insert. Right-click in the box, click **Insert Document Property**, and select the document property from the list.

Format

Specifies the format of the date/time string when it is inserted into the document property. You can specify a value or combination of values from the grids below.

Table 4: Standard DateTime format patterns

Format Pattern	Associated Property/Description
d	ShortDatePattern
D	LongDatePattern
f	Full date and time (long date and short time)
F	FullDateTimePattern (long date and long time)
g	General (short date and short time)
G	General (short date and long time)
m, M	MonthDayPattern
o, O	Round-trip date/time pattern; with this format pattern, th e formatting or parsing operation always uses the invaria nt culture
r, R	RFC1123Pattern; with this format pattern, the formatting or parsing operation always uses the invariant culture

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Format Pattern	Associated Property/Description
s	SortableDateTimePattern (based on ISO 8601) using local time; with this format pattern, the formatting or parsing operation always uses the invariant culture
t	ShortTimePattern
T	LongTimePattern
u	UniversalSortableDateTimePattern using the format for universal time display; with this format pattern, the formatting or parsing operation always uses the invariant culture
U	Full date and time (long date and long time) using universal time
y, Y	YearMonthPattern

Table 5: Custom DateTime format patterns

Format	Description
d, %d	The day of the month. Single-digit days do not have a leading zero. The application specifies "%d" if the format pattern is not combined with other format patterns.
dd	The day of the month. Single-digit days have a leading zero.
ddd	The abbreviated name of the day of the week.
dddd	The full name of the day of the week.
f, %f	The fraction of a second in single-digit precision. The remaining digits are truncated. The application specifies "%f" if the format pattern is not combined with other format patterns.
ff	The fraction of a second in double-digit precision. The remaining digits are truncated.
fff	The fraction of a second in three-digit precision. The remaining digits are truncated.
ffff	The fraction of a second in four-digit precision. The remaining digits are truncated.
fffff	The fraction of a second in five-digit precision. The remaining digits are truncated.
ffffff	The fraction of a second in six-digit precision. The remaining digits are truncated.
fffffff	The fraction of a second in seven-digit precision. The remaining digits are truncated.

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Format	Description
F, %F	Displays the most significant digit of the seconds fractio n. Nothing is displayed if the digit is zero. The applicatio n specifies "%F" if the format pattern is not combined wi th other format patterns.
FF	Displays the two most significant digits of the seconds fr action. However, trailing zeros, or two zero digits, are no t displayed.
FFF	Displays the three most significant digits of the seconds f raction. However, trailing zeros, or three zero digits, are not displayed.
FFFF	Displays the four most significant digits of the seconds f raction. However, trailing zeros, or four zero digits, are n ot displayed.
FFFFF	Displays the five most significant digits of the seconds f raction. However, trailing zeros, or five zero digits, are n ot displayed.
FFFFFF	Displays the six most significant digits of the seconds fr action. However, trailing zeros, or six zero digits, are no t displayed.
FFFFFFF	Displays the seven most significant digits of the seconds fraction. However, trailing zeros, or seven zero digits, ar e not displayed.
gg	The period or era. This pattern is ignored if the date to b e formatted does not have an associated period or era str ing.
h, %h	The hour in a 12-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%h" if the f ormat pattern is not combined with other format patterns.
hh	The hour in a 12-hour clock. Single-digit hours have a le ading zero.
H, %H	The hour in a 24-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%H" if the f ormat pattern is not combined with other format patterns.
HH	The hour in a 24-hour clock. Single-digit hours have a le ading zero.
K	Different values of the Kind property, that is, Local, Utc , or Unspecified.
m, %m	The minute. Single-digit minutes do not have a leading z ero. The application specifies "%m" if the format pattern is not combined with other format patterns.

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Format	Description
mm	The minute. Single-digit minutes have a leading zero.
M, %M	The numeric month. Single-digit months do not have a le ading zero. The application specifies "%M" if the format pattern is not combined with other format patterns.
MM	The numeric month. Single-digit months have a leading zero.
MMM	The abbreviated name of the month.
MMMM	The full name of the month.
s, %s	The second. Single-digit seconds do not have a leading z ero. The application specifies "%s" if the format pattern i s not combined with other format patterns.
ss	The second. Single-digit seconds have a leading zero.
t, %t	The first character in the AM/PM designator, if any. The application specifies "%t" if the format pattern is not co mbined with other format patterns.
tt	The AM/PM designator defined, if any. Your application should use this format pattern for languages for which it is necessary to maintain the distinction between AM and PM. An example is Japanese, for which the AM and PM designators differ in the second character instead of the f irst character.
y, %y	The year without the century. If the year without the cen tury is less than 10, the year is displayed with no leading zero. The application specifies "%y" if the format pattern is not combined with other format patterns.
yy	The year without the century. If the year without the cen tury is less than 10, the year is displayed with a leading z ero.
yyy	The year in three digits. If the year is less than 100, the y ear is displayed with a leading zero.
yyyy	The year in four or five digits (depending on the calendar used), including the century. Pads with leading zeros to g et four digits. Thai Buddhist and Korean calendars have f ive-digit years. Users selecting the "yyyy" pattern see all five digits without leading zeros for calendars that have f ive digits. Exception: the Japanese and Taiwan calendars always behave as if "yy" is selected.
yyyyy	The year in five digits. Pads with leading zeros to get fiv e digits. Exception: the Japanese and Taiwan calendars al ways behave as if "yy" is selected.

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Format	Description
yyyyyy	The year in six digits. Pads with leading zeros to get six digits. Exception: the Japanese and Taiwan calendars always behave as if "yy" is selected. The pattern can be continued with a longer string of "y"s padding with more leading zeros.
z, %z	The time zone offset ("+" or "-" followed by the hour only). Single-digit hours do not have a leading zero. For example, Pacific Standard Time is "-8". The application specifies "%z" if the format pattern is not combined with other format patterns.
zz	The time zone offset ("+" or "-" followed by the hour only). Single-digit hours have a leading zero. For example, Pacific Standard Time is "-08".
zzz	The full time zone offset ("+" or "-" followed by the hour and minutes). Single-digit hours and minutes have leading zeros. For example, Pacific Standard Time is "-08:00".
:	The default time separator.
/	The default date separator.
% c	Where c is a format pattern if used alone. To use format pattern "d", "f", "F", "h", "m", "s", "t", "y", "z", "H", or "M" by itself, the application specifies "%d", "%f", "%F", "%h", "%m", "%s", "%t", "%y", "%z", "%H", or "%M". The "%" character can be omitted if the format pattern is combined with literal characters or other format patterns.
\ c	Where c is any character. Displays the character literally. To display the backslash character, the application should use "\\".

Culture

Specifies the culture name of the data in the document. The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.

@LookupCsv dialog box

Use this dialog box to configure the @LookupCsv function. This function looks up the value for a property in a comma separated values file. The value will be inserted in the document property you are configuring.

Once created, the function command syntax is as follows,

`@lookupCsv ( "` *path / resource* `" ,` *lookup data* `,` *key column name* `,` *data column name* `)`

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Path/Resource

Specifies how you want to locate the .csv file. You can use one of the following options:

- **Path** — Enter the path and file name of the .csv file, or click the browse button (**...**) to navigate to the file.
- **Resource** — Select the appropriate resource from the list, or click the Browse button to choose the resource from the **Manage CsvDocProp Resources** dialog box. If you are using a resource, "CsvDocProp:" will be inserted before the resource name.

Lookup data

Specifies the data you are looking up, this could be data from another document property or the results of an `@parse` function.

- To select a document property, right-click in the box, click **Insert Document Property**, and then select the appropriate property from the list.
- To use the results of an `@parse` function, right-click in the box, click **Insert Function**, and then **@parse()**. Configure the `@parse` function using the **@Parse** dialog box.

Key column name

Specifies the column name in your CSV file where Nuance Output Manager should look for a value that matches the data you entered in the **Lookup data** box.

Data column name

Specifies the column name in your CSV file that contains the data you want inserted into the document property.

@Parse dialog box

Use this dialog to configure the `@parse` function. This function is used to extract data from a document property (for example, Document Name). You can extract data using character offset (specifying a beginning position and length), single delimiters (specify just the starting delimiter, it will be used as the only delimiter, field number, and length), and double delimiters (specifying a starting delimiter, ending delimiter, field number, and length). When you create a business rule action to set document properties, the parsing command should be entered in the appropriate **Value** cell on the **Document Properties** dialog box.

Once created, the function command syntax is as follows,

For character offset: `@parse ( [` *FieldSource* `] ,` *position* `,` *length* `)`

For single delimiter: `@parse ( [` *FieldSource* `] , "` *delimiter* `" ,` *field number*, *length* `)`

For double delimiters: `@parse ( [` *FieldSource* `] , "` *starting delimiter* `" , "` *ending delimiter* `" ,` *field number* `,` *length* `)`

Fieldsource

Specifies the document property from which data will be extracted. Right-click in the box, click **Insert Document Property**, and select the document property from the list. The document property will appear in brackets in the field source box.

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Field

Specifies that you are going to extract data using character offset. To do this you will need to specify a beginning position and length.

- **Position** — Specifies the first position of the string to be extracted. The first character of source data is indicated by specifying a 1.
- **Length** — Specifies the length of the string to be extracted. If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.

Delimited List

Specifies that you are going to extract data using single delimiters or double delimiters. If you are using a single delimiter you will specify just the starting delimiter, it will be used as the only delimiter, field number, and length. If you are using double delimiters you will specify a starting delimiter, ending delimiter, field number, and length.

- **Starting delimiter** — Specifies the character that marks the beginning of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as \\.
- **Ending delimiter** — Specifies the character that marks the end of the string. If a comma or backslash is used as the first character of the delimiter, then a backslash must precede the delimiter in the command. For example, a backslash delimiter will be shown in the command as \\. If you are using a single delimiter, this field can be left blank.
- **Field number** — Specifies the position of the field that will be extracted. (1 refers to the first field, 2 to the second, and so on.)
- **Length** — Specifies the length of the string to be extracted. If the length specified is zero (0) or if the length is greater than the remaining data, then all data to the last character will be used.

@StringToDateTime dialog box

Use this dialog box to configure the `@stringToDateTime` function. This function converts a string (usually from another document property) to a date and time in the format specified. The string could be an extracted variable or another document property. This function inserts the configured date/time into a date/time document property.

Once created, the function command syntax is as follows,

`@stringToDateTime` (*FieldSource*,*Format*)

`@stringToDateTime` (*FieldSource*,*Format* , *Culture*)

`@stringToDateTime` ({ *OutputVariable* } , *Format*)

`@stringToDateTime` ({ *OutputVariable* } , *Format* , *Culture*)

FieldSource

Specifies how you want to retrieve the date/time that will be inserted in the document property. You can do this using one of the following methods:

- **FieldSource** — The document property that contains the string you want converted to a date/time. Right-click in the box, click **Insert Document Property**, and click the document property from the list.
- **Output Variable** — The output variable that contains the string you want converted to a date/time. Right-click in the box, click **Insert Variables**, and select the output variable from the list. You can also enter the output variable directly in the box. The variable must be surrounded with curly braces {}. The output variables are from

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an Advanced Document Modification rule or an extraction variable from an extract rule (line mode or page mode) or burst rule (line mode or page mode).

Format

Specifies the format of the date/time value when it is inserted into the document property. You can specify a value or combination of values from the grids below.

Table 6: Standard DateTime format patterns

Format Pattern	Associated Property/Description
d	ShortDatePattern
D	LongDatePattern
f	Full date and time (long date and short time)
F	FullDateTimePattern (long date and long time)
g	General (short date and short time)
G	General (short date and long time)
m, M	MonthDayPattern
o, O	Round-trip date/time pattern; with this format pattern, th e formatting or parsing operation always uses the invaria nt culture
r, R	RFC1123Pattern; with this format pattern, the formatting or parsing operation always uses the invariant culture
s	SortableDateTimePattern (based on ISO 8601) using loc al time; with this format pattern, the formatting or parsin g operation always uses the invariant culture
t	ShortTimePattern
T	LongTimePattern
u	UniversalSortableDateTimePattern using the format for universal time display; with this format pattern, the form atting or parsing operation always uses the invariant cult ure
U	Full date and time (long date and long time) using unive rsal time
y, Y	YearMonthPattern

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Table 7: Custom DateTime format patterns

Format	Description
d, %d	The day of the month. Single-digit days do not have a lea ding zero. The application specifies "%d" if the format p attern is not combined with other format patterns.
dd	The day of the month. Single-digit days have a leading z ero.
ddd	The abbreviated name of the day of the week.
dddd	The full name of the day of the week.
f, %f	The fraction of a second in single-digit precision. The re maining digits are truncated. The application specifies " %f" if the format pattern is not combined with other for mat patterns.
ff	The fraction of a second in double-digit precision. The re maining digits are truncated.
fff	The fraction of a second in three-digit precision. The rem aining digits are truncated.
ffff	The fraction of a second in four-digit precision. The rem aining digits are truncated.
fffff	The fraction of a second in five-digit precision. The rema ining digits are truncated.
ffffff	The fraction of a second in six-digit precision. The remai ning digits are truncated.
fffffff	The fraction of a second in seven-digit precision. The re maining digits are truncated.
F, %F	Displays the most significant digit of the seconds fractio n. Nothing is displayed if the digit is zero. The applicatio n specifies "%F" if the format pattern is not combined wi th other format patterns.
FF	Displays the two most significant digits of the seconds fr action. However, trailing zeros, or two zero digits, are no t displayed.
FFF	Displays the three most significant digits of the seconds f raction. However, trailing zeros, or three zero digits, are not displayed.
FFFF	Displays the four most significant digits of the seconds f raction. However, trailing zeros, or four zero digits, are n ot displayed.

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Format	Description
FFFFF	Displays the five most significant digits of the seconds f raction. However, trailing zeros, or five zero digits, are n ot displayed.
FFFFFF	Displays the six most significant digits of the seconds fr action. However, trailing zeros, or six zero digits, are no t displayed.
FFFFFFF	Displays the seven most significant digits of the seconds fraction. However, trailing zeros, or seven zero digits, ar e not displayed.
gg	The period or era. This pattern is ignored if the date to b e formatted does not have an associated period or era str ing.
h, %h	The hour in a 12-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%h" if the f ormat pattern is not combined with other format patterns.
hh	The hour in a 12-hour clock. Single-digit hours have a le ading zero.
H, %H	The hour in a 24-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%H" if the f ormat pattern is not combined with other format patterns.
HH	The hour in a 24-hour clock. Single-digit hours have a le ading zero.
K	Different values of the **Kind** property, that is, Local, Utc , or Unspecified.
m, %m	The minute. Single-digit minutes do not have a leading z ero. The application specifies "%m" if the format pattern is not combined with other format patterns.
mm	The minute. Single-digit minutes have a leading zero.
M, %M	The numeric month. Single-digit months do not have a le ading zero. The application specifies "%M" if the format pattern is not combined with other format patterns.
MM	The numeric month. Single-digit months have a leading zero.
MMM	The abbreviated name of the month.
MMMM	The full name of the month.
s, %s	The second. Single-digit seconds do not have a leading z ero. The application specifies "%s" if the format pattern i s not combined with other format patterns.
ss	The second. Single-digit seconds have a leading zero.

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Format	Description
t, %t	The first character in the AM/PM designator, if any. The application specifies "%t" if the format pattern is not co mbined with other format patterns.
tt	The AM/PM designator defined, if any. Your application should use this format pattern for languages for which it is necessary to maintain the distinction between AM and PM. An example is Japanese, for which the AM and PM designators differ in the second character instead of the f irst character.
y, %y	The year without the century. If the year without the cen tury is less than 10, the year is displayed with no leading zero. The application specifies "%y" if the format pattern is not combined with other format patterns.
yy	The year without the century. If the year without the cen tury is less than 10, the year is displayed with a leading z ero.
yyy	The year in three digits. If the year is less than 100, the y ear is displayed with a leading zero.
yyyy	The year in four or five digits (depending on the calendar used), including the century. Pads with leading zeros to g et four digits. Thai Buddhist and Korean calendars have f ive-digit years. Users selecting the "yyyy" pattern see all five digits without leading zeros for calendars that have f ive digits. Exception: the Japanese and Taiwan calendars always behave as if "yy" is selected.
yyyyy	The year in five digits. Pads with leading zeros to get fiv e digits. Exception: the Japanese and Taiwan calendars al ways behave as if "yy" is selected.
yyyyyy	The year in six digits. Pads with leading zeros to get six digits. Exception: the Japanese and Taiwan calendars alw ays behave as if "yy" is selected. The pattern can be cont inued with a longer string of "y"s padding with more lea ding zeros.
z, %z	The time zone offset ("+" or "-" followed by the hour on ly). Single-digit hours do not have a leading zero. For ex ample, Pacific Standard Time is "-8". The application sp ecifies "%z" if the format pattern is not combined with o ther format patterns.
zz	The time zone offset ("+" or "-" followed by the hour on ly). Single-digit hours have a leading zero. For example, Pacific Standard Time is "-08".

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Format	Description
zzz	The full time zone offset ("+" or "-" followed by the hour and minutes). Single-digit hours and minutes have leadin g zeros. For example, Pacific Standard Time is "-08:00".
:	The default time separator.
/	The default date separator.
% c	Where c is a format pattern if used alone. To use format pattern "d", "f", "F", "h", "m", "s", "t", "y", "z", "H", or "M" by itself, the application specifies "%d", "%f", "%F", "%h", "%m", "%s", "%t", "%y", "%z", "%H", or "%M". The "%" character can be omitted if the format pattern is combined with literal characters or other format patterns.
\ c	Where c is any character. Displays the character literally . To display the backslash character, the application shou ld use "\\".

Culture

Specifies the culture name of the data in the document. The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.

Activate License dialog box

Use this dialog box to determine how you want to activate the Nuance Output Manager license file. You can activate all components over the Internet, perform a custom activation by selecting the individual components you want to activate, or skip activation.

Activate all DBM components via the Internet

Automatically activates all Nuance Output Manager DBM components. An internet connection is required to use this method.

Custom DBM activation

Allows you to choose the Nuance Output Manager components you want to activate.

Skip activation at this time

Completes the license file installation without activating the license. You can activate the license at a later time using the **OM License wizard**.

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Add Columns dialog box

This dialog box allows you to edit columns that will display by default in the Destinations, Sources, Library, Devices application views. You can also edit columns for the Output History and Document Owner.

Open the **Add Columns** dialog box by clicking the **Add** button on any of the tabs in the **Administration - Configure Columns** utility. Select check boxes in the first column to add columns to a grid view, and then click **OK** to save your changes.

Column	Description
	Click a button in the first row to select a column. You ca n drag across buttons in this column to select adjacent ch eck boxes. Press Shift and click to extend selection of ch eck boxes. Press Ctrl and click to add columns to a selec tion.
	Select the check box in this column to add a column to a grid. Click the button at the top of this column to clear al l check boxes.
Column Name	This name identifies the column.
Display Name	This name is the initial **Display Name** for a column. Thi s is the name that appears in a destination, source, library , or device grid view. You can edit the **Display Name** aft er you click **OK** to close the dialog box.

Add Destination (from Devices) dialog box

Use this dialog box to create a destination from the selected device. The **Add Destination** dialog box is opened by right-clicking a device and then clicking **Create Destination**.

Type

Selects the type of destination or source you want to create.

Server

Specifies the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination or source.

Assign to group

Selects the source or destination group where the destination or source will be created.

Use DNS name if available

Select this check box to allow the source or destination to be accessed by its DNS name when available. Clear this check box to require that the source or destination always be accessed using its IP address.

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Add Destination dialog box

Use this dialog box to select the type of destination you want to add. After you select the destination type, a window will display showing all of the configuration options.

Type

Selects the type of destination you want to add.

Add new devices

Specifies the number of destinations you want to create. Administrators can create thousands of destinations and configure them simultaneously using bulk configuration. The destinations will be created in the selected destination group.

Import devices from configuration (.CSV) file

Imports a list of destinations into Nuance Output Manager. This is particularly useful if you have a database, spreadsheet, and so forth, that lists your existing equipment. You can save that document as a CSV file and then import it to create matching destinations in Nuance Output Manager.

To import, enter the path and file name of the configuration file or click the browse button (**...**) to navigate to the file. The imported destinations will be added to the selected destination group.

Add Source dialog box

Use this dialog box to select the type of source you want to add. After you select the source type, a window will display showing all of the configuration options.

Type

Selects the type of source you want to add. The available source types are Email, Nuance Output Manager, FTP, LPD, Network Folder, Socket, Web Upload, WebSphere MQ, and Windows Queue.

Add new devices

Specifies the number of sources you want to create. Administrators can create thousands of sources and configure them simultaneously using bulk configuration. The sources will be created in the selected source group.

Import devices from configuration (.CSV) file

Imports a list of sources into Nuance Output Manager. This is particularly useful if you have a database, spreadsheet, and so on, that lists your existing equipment. You can save that document as a CSV file and then import it to create matching sources in Nuance Output Manager.

To import, enter the path and file name of the configuration file or click the Browse (...) button to navigate to the file. The imported sources will be added to the selected source group.

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Ad Hoc Rule dialog box

Use this dialog box to create and modify ad hoc rules. You can access this dialog box from the **Ad Hoc Rules Manager** dialog box.

Name

Enter the name of the ad hoc rule.

Description

Enter a description of the ad hoc rule. This will display in the **Ad Hoc Rules Manager** dialog box.

Rule definition

Always execute this rule (no conditions) — Use this option to apply the rule to all documents. This will disable the **When** box as no condition statements are needed.

When

The **When** box is used to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group.

To create a condition, click the **<Target>** link and then click the appropriate condition. Click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. This will complete the condition statement.

You can select the condition statement and use the buttons below the box to add and remove conditions.

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.

Perform the following actions

The **Perform the following actions** box is used to create and manage rule actions.

The order of ad hoc rule actions is very important, as the action behavior can depend on where it occurs in the sequence of actions. By default the actions apply to the targeted documents. For example, if your rule contains a **Create Package** action, the create package will act upon the targeted documents. In contrast, actions that follow an action that produces documents, will apply to the produced documents. Using the previous example, if following the **Create Package** action you have a **Merge Package** action followed by a **Set Document Properties** action, followed by a **Set Document State** action, and finally followed by a **Route to Destination** action, the merge package action will apply to the package created by the **Create Package** action, and the latter three actions will apply to the resultant merged documents from the **Merge Package** action. If you had a **Set Document Properties** action that preceded the **Create Package** action, it would apply to the original targeted documents.

- To create an action, click the **<Action>** link and select the appropriate action type. You can create the following actions:
  - **Run Business Rules** — Specifies if you want to run business rules against input or output documents.

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  - **Delete Document** — Deletes documents.
  - **Set Priority in Group** — documentation coming soon
  - **Assign to Document Folder** — Assigns documents to specific document folders.
  - **Set Document Owner** — Configures the document owner.
  - **Route to Destinations** — Specifies the destinations where documents should be sent.
  - **Set Document State** — Sets the document state to hold or ready.
  - **Create Package** — Configures a package of documents. This opens the **Create Package** dialog box.
  - **Zip Package** — Zips the merged document or any other documents in Nuance Output Manager. This opens the **Zip Package** dialog box.
  - **Merge Package** — Configures the document properties of the merged file. This opens the **Merge Package** dialog box.
  - **Modify Document Content** — Configures. This opens the **ABC** dialog box.
  - **Modify Document Properties** — Configures. This opens the **ABC** dialog box.
  - **Package Banner** — Configures. This opens the **ABC** dialog box.
  - **Run Command** — Configures. This opens the **ABC** dialog box.
  - **Unzip Document** — Configures. This opens the **ABC** dialog box.
- To create additional actions, click **Add Action**.
- To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

Allowed for document right click

Use the check box to determine if the rule will be available to apply directly to documents from the **Documents** grid. When selected, the rule will be available as an option when you right-click a document and click **Run Ad hoc Rule**. Rules with this option enabled will display in the submenu.

Ad Hoc Rules Manager dialog box

Administrators can use the **Ad Hoc Rules Manager** to create ad hoc rules. Ad hoc rules are used for documents that exist in Nuance Output Manager, where business rules are used for documents as they enter Nuance Output Manager. Ad hoc rules can be initiated by scheduling a task in the **Schedule Manager**, by using the **Run Now** option in the **Ad Hoc Rules Manager**, or by running a configured rule from the **Documents** grid or business rules. An example use for ad hoc rules is to merge a set of documents into a package.

Ad hoc rules grid

The ad hoc rules grid lists all of the defined ad hoc rules. Selecting a rule will display the rule for preview below the grid.

The following buttons display below the grid.

- **Add button** — Creates a new ad hoc rule. This opens the **Ad Hoc Rule** dialog box.
- **Modify button** — Modifies the selected ad hoc rule. This opens the **Ad Hoc Rule** dialog box.
- **Remove button** — Deletes the selected ad hoc rule.
- **Copy button** — Creates a copy of the selected rule. To rename the rule, double-click the rule, or select the new rule and click **Modify**. This opens the **Ad Hoc Rule** dialog box.
- **Move Up button** — Reorders the ad hoc rules by moving the selected rule up.

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- **Move Down button** — Reorders the ad hoc rules by moving the selected rule down.
- **Run Now button** — Allows you to run the currently selected rule now. You can choose to run the rule using one of the following options:
- **All documents** — Runs the selected rule against all documents in the spool that are not currently in retain.
- **New documents since last run** — Runs the selected rule against any documents that have arrived into the spool since the last time the rule was run.

Preview for rule

Displays a preview of the selected ad hoc rule.

Adjust Message Priority dialog box

Use this dialog box to set server and module-specific priority levels for trace activity. Records will appear in the **Message Console** for modules that have a priority level less than or equal to the set value. You can access this dialog box by clicking **Configure** on the **Message Console** toolbar.

Warning: Performance Tuning: Setting the priority higher than **Operator Information** can cause performance degradation. Because the **Message Console** continues to process information after you close the utility, you must check the priority settings before you close. If you experience any problems, we recommend changing the priority setting to **Operator Information**.

Server/Message Module Column

The **Server** column lists the servers with Nuance Output Manager services installed. The **Message Module** column lists the individual modules for each server. This allows you to specify a priority for each module on a specific server.

Notice, the **Message Module** column also contains an **All Modules on this Server** cell for each server. Selecting a priority level in this cell will cause all messages for the selected server to be set to the same priority level. All of the other rows will remain unchanged in this dialog box, but the **Message Console** messages will be set at the priority specified in the **All Modules on this Server** row.

Message Priority

Sets the module's priority level. Module activity that meets or exceeds the selected priority level will appear on the console and will be stored to disk. For example, the default priority level setting is Operator Information. This means messages will display with a priority of Operator Failure, Operator Warning, and Operator Information. The priority level identifies the type of activity that has occurred in a selected program module. Messages that appear in the **Message Console** window also have color coding. See the following table for a detailed description of the priority levels.

Warning: We recommend setting your priority level to **Operator Information**. Only select a development priority level if advised to do so by a Nuance Output Manager support analyst.

Table 8: Message Priorities

Level	Color	Description
Operator Failure	light red	Errors that halt execution.
Operator Warning	light yellow	Warns of a potential problem.

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Level	Color	Description
Operator Information	white	Informs of normal operation.
Support Trace	light orange	Messages for troubleshooting that track normal process flow and protocol execution.
Development Failure	red	Informs programmer of infrequent, but important, task.
Development Warning	yellow	Informs programmer of infrequent, but less critical, task.
Development Information	gray	Informs programmer of regular operation.
Development Trace	orange	Informs programmer of detailed operation.

Adjust User Custom Properties dialog box

Use this dialog box to enable and specify values for custom user properties.

This dialog allows you to enable and set values for five custom string properties, five custom integer properties, and five custom Boolean properties. This dialog box is opened by clicking **Set Custom Properties** in the **Output Manager User** dialog box.

Advanced Costing Profile dialog box

Use this dialog when you need to create an advanced costing profile for assigning specific printing costs to sources.

You can access this dialog box when you configure a source from the **More settings** tab.

Name

Specifies the advanced costing profile name.

Description

Includes a description of the profile.

Grid

Lists the printing options and the cost associated with each option. Click directly in the grid to configure the cost for each printing option.

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Alert Rule dialog box

Use this dialog box to create and modify alert rules. You can configure alert options that will occur when certain events happen. This is particularly useful for monitoring printer states. You can access this dialog box from the **Alert Rules Manager** dialog box.

Name

Enter the name of the alert rule.

Enabled

Use the check box to enable or disable the rule. This option is enabled by default.

Description

Enter a description of the alert rule. This will display in the **Alert Rules Manager**.

Rule definition

When

The **When** box is used to create and manage the rule conditions. Rule conditions are based on the Destination State, Destination, and Fault selections. To create a condition, click the **<Values>** link to select the appropriate values.

Destination state — Click the **<Values>** link to configure the destination state condition. From the **Select Alert** dialog box, expand the **SNMP Device Alerts** tree and the **Destination Alerts** tree and select the options that the alert rule should perform the actions on.

Destination — Click the **<Values>** link to configure the destination condition. From the **Select Destination** dialog box, you can select multiple destinations by pressing the Ctrl or Shift keys and selecting destinations. When finished, click **OK**.

Fault — Click the link to choose between the **Occurs** and **Behavior** options.

- **Occurs** — The action will be executed when the fault occurs. The fault condition will not be evaluated. This is the default selection.
- **Behavior** — If you select this option, a **<Values>** link will display. Click this link to configure the fault behavior. From the **Fault Behavior** dialog box, configure whether the behavior that triggers the rule action is active for the time period chosen, or if the fault behavior is repeated so many times before the rule action is fired. If you do not want this level of granularity for the fault condition select the **Occurs** behavior.

Reminder interval — Allows you to repeat the action over a period of time. Click the link to configure the reminder interval on the **Notification Reminder** dialog box. If you want the action to only send the notification once, set the value for the notification reminder interval to 0 and the value will change to None. The default reminder interval is None.

You must select values for all definitions in order to save the rule.

Perform the following actions

The **Perform the following actions** box is used to create and manage rule actions.

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- To create an action, click the **<Action>** link and select **Send Email**.
- To create additional actions, click **Add Action**.
- To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

Follow-on action

Select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

Alert Rules Manager dialog box

Administrators can use the **Alert Rules Manager** to create alert rules. Alert rules are configured by selecting an event and then configuring the alert option that will be performed when that event occurs. This is particularly useful for monitoring printer states. Using alert rules, support personnel can be automatically notified when printers have conditions that could prevent end user printing.

Alert rules grid

The alert rules grid lists all of the defined alert rules, in the order they will be processed. Selecting a rule will display the rule for preview below the grid. The alert rules grid is editable. Use the following procedures from the rules grid.

- Use the check box in the **Enabled** column to determine if the rule is enabled or disabled.
- To change the follow-on action, click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

The following buttons display below the grid.

- **Add button** — Creates a new alert rule. This opens the **Alert Rule** dialog box.
- **Modify button** — Modifies the selected alert rule. This opens the **Alert Rule** dialog box.
- **Remove button** — Deletes the selected alert rule.
- **Copy button** — Creates a copy of the selected rule. To rename the rule, double-click the rule, or select the new rule and click **Modify**. This opens the **Alert Rule** dialog box.
- **Move Up button** — Reorders the alert rules by moving the selected rule up.
- **Move Down button** — Reorders the alert rules by moving the selected rule down.

Preview for rule

Displays a preview of the selected alert rule.

Allowances Profile dialog box

An allowances profile restricts users to a printing allowance.

Display this dialog box when working in **Administration - Manage Users**. On the **Users** tab, click the browse button (**...**) for a user in the **Allowances Profile** column. Then in the **Manage Allowances Profiles** dialog box, click either **New** or **Edit** to create or edit an allowance profile.

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Option	Description
Profile name	Identifies the profile. This name shows in the **Allowances Profile** list.
Profile description	Provides space to provide information about a profile.
Initial printing balance	The amount that users that are assigned this profile are allowed to expend on printing or both printing and copying during the interval specified by **Refresh Period**.
Copy balance type	Describes the balance type: **Unlimited copying allowed** — No limit on the number of copies that a user can make. **Maximum pages (total)** — User is allowed to create a combined number of both black and white and color pages. **Maximum pages (separate Color/BW** — User is allowed to create specified numbers of color and black and white pages. **Balance (share printing balance)** — Printing and copying consume the same balance. **Balance (separate)** — Printing and copying consume separate balances.
Total pages	Specifies the total number of both color and black and white pages that a user can print during a refresh period. This field is available when Maximum pages (total) is specified for **Copy balance type**.
Color pages	Specifies the number of color pages that a user can print during a refresh period. This field is available when Maximum pages (separate Color/BW) is specified for **Copy balance type**.
BW pages	Specifies the number of black and white pages that a user can print during a refresh period. This field is available when Maximum pages (separate Color/BW) is specified for **Copy balance type**.

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Option	Description
Initial copying balance	The amount that users who are assigned this profile are allowed to expend on copying during the interval specified by **Refresh Period**. This option is available when Balances (separate) is specified for **Copy balance type**. **Important:** This option should not be set to 0 for **Remaining Copy Balance** to display the correct information when a user performs a copy job.
Refresh Period (all)	Specifies that period in which initial balances or page numbers are consumed. Balances or page numbers are renewed at the beginning of each new period.

Assign Access Control dialog box

Use this dialog box to configure access control profiles that allow users, groups, and departments to access device functionality. When access is controlled for a device, users must have user, group, or department level permissions to access the device.

This dialog box configures access control for selected MFP devices.

Users tab

Settings on this tab configure user access to MFP devices.

Select the check box next to a user account to specify access for a user.

Option	Description
User Name	Shows a user on the machine or network.
Type	Shows the type of user account.
Access Control Protocol	Click in this box to select an access control profile. An access control profile defines whether a user has basic **Full Access** or **No Access** access, or **Specified Access** or advanced manufacture specific access. Click the browse button **...** to create or edit profiles.
Select All	Selects check boxes for all users in the table.
Clear All	Clears check boxes for all users in the table.

Groups tab

Settings on this tab configure group access to MFP devices.

Select the check box next to a group specify access for all users in a group.

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Option	Description
group ID	Shows the Output Manager group ID.
Group Name	Shows the group name.
Type	Shows the type of group.
Access Control Protocol	Click in this box to select an access control profile. An access control profile defines whether a user has basic **Full Access** or **No Access** access, or **Specified Access** or advanced manufacture specific access. Click the browse button **...** to create or edit profiles.
Select All	Selects check boxes for all groups in the table.
Clear All	Clears check boxes for all groups in the table.

Departments tab

Settings on this tab configure department access to MFP devices.

Select the check box next to a department to specify access for all users in a department.

Option	Description
group ID	Shows the Output Manager department ID.
Group Name	Shows the department name.
Access Control Protocol	Click in this box to select an access control profile. An access control profile defines whether a user has basic **Full Access** or **No Access** access, or **Specified Access** or advanced manufacture specific access. Click the browse button **...** to create or edit profiles.
Select All	Selects check boxes for all departments in the table.
Clear All	Clears check boxes for all departments in the table.

Bitmap Output tab

Use this tab to configure bitmap output transform options. You can access this dialog box when you configure a transform with a BMP output format. Transforms can be configured for business rule or output process actions or IPDS destinations (not available for new sales).

Click an option you want to learn more about.

- *Input Options tab* on page 553
- *Output Options tab* on page 590
- *Page Layout tab* on page 595

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Extract bitmaps to multipage file

Extracts bitmaps to a multipage file. The output type must be a multipage image format (for example, TIF).

Size and resolution

- **Bitmap output size** — Specifies the height and width of the output file in x and y directions (in pixels).
- **Bitmap maximum size** — Specifies the maximum size of the output file in x and y directions (in pixels).
- **Bitmap resolution** — Specifies the resolution of output file in x and y directions. The resolution is specified in dpi (dots per inch).

Browse LDAP Server dialog box

When adding LDAP users to Nuance Output Manager, you must specify the LDAP server you will searching.
Use this dialog box to specify the LDAP server that contains the users you want to add. Once the users are added, permissions and quotas can be assigned as needed. You can access this dialog box when adding LDAP users from the **LDAP User** dialog box.

Base DN

Specifies the DN (distinguished name) of the entry at which the search begins.

Filter

Specifies criteria to use in the search.

Search button

Performs a search of the specified server

Tree

Displays the LDAP directory in a tree view. When you click an entry in the tree, its attributes and values are displayed in the grid.

Grid

Displays the attributes and values for a user or group that you have selected from the LDAP directory.

Burst Document - Line Mode dialog box

Use this dialog box to configure the settings that split line data documents into separate documents.

You access the dialog box through the **New Business Rule** dialog box when you choose to configure a Burst Line Mode action.

Tab options

Options in this dialog box are grouped on the tabs described in the following table:

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Tab	Description
Extract Text tab on page 472	Use this tab to define the settings that extract text from line data documents.
Burst Conditions tab on page 473	Use this tab to define the settings that split line data documents.
Set Document Properties tab on page 474	Use this tab to set the document properties for the documents created from splitting line data documents.

Extract Text tab

Use this tab to define the settings that extract text from line data documents.

This tab is used when you create business rule actions to extract and burst using line mode. The Extract - Line Mode business rule action extracts text from line data documents using rows and columns. The Burst - Line Mode business rule action splits line data documents (text documents with or without carriage control) based on data contained in the document. Use this tab to configure variables that are populated with data from the document or the document's banner.

Server

Specifies the licensed rules agent server that you would like to use.

Detect

Use — Specifies how you want to detect the text to extract. You can use one of the following methods:

- **Lines** — Select if your lines end with carriage controls and you know the number of lines per page. You will need to enter this value.
- **Records** — Select if your document does not have carriage controls at the ends of the lines or if you do not know how the lines will appear on the page.

Lines per page — Specifies the number of lines per page. This is only available if you select to detect text using **Lines**. Standard lines per page values are 66 or 88 for an 11-inch page with either 6 or 8 lines per inch, respectively. The default value is 66 lines per page.

Format — Specifies the data format. You can choose VBM, ASCII, ASCII w/ASA, or S370.

Code page — Specifies the associated code page.

Banner mode

Selecting this option allows the recognition string location to vary on the page. This will search the document for a recognition string. The recognition line becomes line 1 and the extraction variables will be relative to it.

Search for — Specifies the text that defines the banner.

Page — Specifies the page number to start searching for banner text.

Column — Specifies the column at which to start searching for banner text.

Lines — Specifies the starting and ending line numbers to search for banner text.

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Extraction Variables

The variables grid lists all of the defined extraction variables. You can add, modify, and remove variables using the buttons above the grid. There are two types of extraction variables, those used for bursting and those used to extract data.

New button — Creates a new extraction variable from the **Text Extraction Variable Definition** dialog box.

Modify button — Modifies the selected extraction variable from the **Text Extraction Variable Definition** dialog box. Note, once a variable of a particular type has been created, it cannot be changed to the other type.

Remove button — Deletes the selected extraction variable.

Burst Conditions tab

Use this tab to define the settings that split line data documents.

This tab is used with **Burst - Line Mode** and **Burst - Page Mode** business rule actions. Line mode splits text documents based on data contained in the document. Page mode uses regions (rectangles) to determine burst conditions. Use this tab to control how the document is split.

Split based on

Specifies how to create the new documents. You can choose to create documents by bursting (new documents are based on **Extracted variables**) or by splitting (new documents are based on **Size** or the desired **Number of output documents**).

Extracted variables — Allows for selecting the extraction variables created from the **Text Extraction Variable Definition** dialog box as conditions in the **When** box. You can choose the extraction variable and condition that will cause new documents to be created.

Number of pages — Allows for splitting documents based on the number of pages. When you select this option the **Split** > **Pages in new document** and **Split** > **Pages in current document** variables are available in the **When** box. See descriptions below.

Number of output documents — Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages, and you set **Number of output documents** to 3, you would get 3 output documents of 33 pages each. If the number of pages of the document is not equally divisible, the document will be split as close as possible to even numbers. For example, a document with 24 pages split into 5 documents will return 4 documents that are 5 pages, and 1 document that is 4 pages.

If necessary, you can select extraction variables created from the **Extract Text** tab as conditions in the **When** box. Output Manager will find the position in the source document where the split should occur based on pages per documents, and then start a new document after the additional condition is met. This allows the boundary between split documents to be better controlled based on the contents of the document.

Burst when

Important: To enable the **Burst when** box when splitting on extracted variables, you must create extraction variables from the **Extract Text - line mode** tab or **Extract Text - page mode** tab.

The **Burst when** box is used to create and manage burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a condition, click the **<Target>** link and then click the appropriate variable. The variables that display vary depending what the split is based on.

- If the split is based on **Extracted variables**, the extraction variables added from the **Extract Text** tab will be listed in the menu.

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- If the split is based on **Number of pages**, you can choose the following variables to split the document based on the number of pages:
- **Split** > **Pages in current document** — Specifies the total number of pages in the current document.
- **Split** > **Pages in new document** — Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages.

Note: For example, if you create a condition where "**Pages in new document** is divisible by 20 AND **Pages in current document** is between to 0 AND 200", when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document.

- If the split is based on **Number of output documents**, the extraction variables added on the **Extract Text** tab will be listed in the menu.

Once the target is selected, click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. This will complete the condition statement.

You can select the condition statement and use the buttons below the box to add and remove conditions.

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.

Output format (Page Mode Only)

Bursting using page mode allows you to transform the document in this rule action. You can choose to leave the output format the same as the input format or change it to a format in the list.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Set Document Properties tab

Use this tab to set the document properties for the documents created from splitting line data documents.

This tab is used with extracting and bursting business rule actions.

- **Extract** — Line mode extracts text from line data documents using rows and columns. Page mode extracts text from printer ready documents using regions (rectangles).
- **Burst** — Line mode splits text documents based on data contained in the document. Page mode uses regions (rectangles) to determine burst conditions. Use this tab to configure the document properties on the new documents created by bursting.

Properties

Configure the document properties by clicking directly in the grid.

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Document Property column — Lists the property values that can be configured. The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the print preferences/document properties that belong to that group. The first node level in the categories determine the print preferences for the properties it contains. On the print preference node, you select how the property should be applied when a document is sent to a destination. Under each print preference are the parameters needed to generate that print preference.

Mode column — Specifies how to apply the property value. Click in the cell and choose one of the following options:

- **Always Apply** — Always applies the specified property value. Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Output Manager will modify the commands to work with the printer family where the document is being sent.
- **Apply Conditionally** — Applies the property value conditionally. Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** — Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
- **Value Not Set** — No value is set for the property.

Value column — Specifies the document property value. Click directly in the cell to change the value. You can use functions to insert and extract data as necessary.

Burst Document - Page Mode dialog box

Use this dialog box to configure the settings that split printer-ready documents into separate documents.

You access the dialog box through the **New Business Rule** dialog box when you choose to configure a Burst Page Mode action.

Tab options

Options in this dialog box are grouped on the tabs described in the following table:

Tab	Description
Extract Text tab on page 475	Use this tab to define the settings that extract text from page regions.
Burst Conditions tab on page 476	Use this tab to define the settings that split printer-ready documents.
Set Document Properties tab on page 478	Use this tab to set the document properties for the documents created from splitting printer-ready documents.

Extract Text tab

Use this tab to define the settings that extract text from page regions.

This tab is used when you create business rule actions to extract and burst using page mode. The Extract - Page Mode business rule action extracts text from printer ready documents using regions (rectangles). The Burst - Page Mode

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business rule bursts printer ready documents. Regions (rectangles) are used to determine burst conditions, or splitting is based on the desired output size of documents or the desired number of output documents.

Server

Click the server to configure.

Server configuration

Transform package — Specifies the transform package. You can select a transform package from the list or click **New** to create one. You can also select a transform package and modify or remove it.

Override input filter profile assigned to document — Determines if you want to use the filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.

Additional parameters — Specifies any additional parameters needed for the document modification software.

Extraction Variables

The variables grid lists all of the defined extraction variables. You can add, modify, and remove variables using the buttons above the grid. There are two types of extraction variables, those used for bursting and those used to extract data.

New button — Creates a new extraction variable from the **Text Extraction Variable Definition** dialog box.

Modify button — Modifies the selected extraction variable from the **Text Extraction Variable Definition** dialog box. Note, once a variable of a particular type has been created, it cannot be changed to the other type.

Remove button — Deletes the selected extraction variable.

Burst Conditions tab

Use this tab to define the settings that split printer-ready documents.

This tab is used with **Burst - Line Mode** and **Burst - Page Mode** business rule actions. Line mode splits text documents based on data contained in the document. Page mode uses regions (rectangles) to determine burst conditions. Use this tab to control how the document is split.

Split based on

Specifies how to create the new documents. You can choose to create documents by bursting (new documents are based on **Extracted variables**) or by splitting (new documents are based on **Size** or the desired **Number of output documents**).

Extracted variables — Allows for selecting the extraction variables created from the **Text Extraction Variable Definition** dialog box as conditions in the **When** box. You can choose the extraction variable and condition that will cause new documents to be created.

Number of pages — Allows for splitting documents based on the number of pages. When you select this option the **Split** > **Pages in new document** and **Split** > **Pages in current document** variables are available in the **When** box. See descriptions below.

Number of output documents — Splits a document into a specified number of equally sized output documents. For example, if you submit a document with 99 pages, and you set **Number of output documents** to 3, you would get 3 output documents of 33 pages each. If the number of pages of the document is not equally divisible, the document

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will be split as close as possible to even numbers. For example, a document with 24 pages split into 5 documents will return 4 documents that are 5 pages, and 1 document that is 4 pages.

If necessary, you can select extraction variables created from the **Extract Text** tab as conditions in the **When** box. Output Manager will find the position in the source document where the split should occur based on pages per documents, and then start a new document after the additional condition is met. This allows the boundary between split documents to be better controlled based on the contents of the document.

Burst when

Important: To enable the **Burst when** box when splitting on extracted variables, you must create extraction variables from the **Extract Text - line mode** tab or **Extract Text - page mode** tab.

The **Burst when** box is used to create and manage burst conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group. To create a condition, click the **<Target>** link and then click the appropriate variable. The variables that display vary depending what the split is based on.

- If the split is based on **Extracted variables**, the extraction variables added from the **Extract Text** tab will be listed in the menu.
- If the split is based on **Number of pages**, you can choose the following variables to split the document based on the number of pages:
- **Split** > **Pages in current document** — Specifies the total number of pages in the current document.
- **Split** > **Pages in new document** — Specifies the number of pages to be contained in each new burst document. The number of pages is determined from the beginning of the document or from the previous burst. If the total number of pages of the current document is not equally divisible by this value, the final burst document will contain fewer pages.

Note: For example, if you create a condition where "**Pages in new document** is divisible by 20 AND **Pages in current document** is between to 0 AND 200", when you submit a 100 page document, the process will split it into 5 20 page documents. Each page is analyzed to determine if it is the 20th page since a burst or the beginning of the document. When the 20th page is reached, a new burst document is created containing those 20 pages (that page combined with the previous 19 pages). The page count process repeats until the end of the document.

- If the split is based on **Number of output documents**, the extraction variables added on the **Extract Text** tab will be listed in the menu.

Once the target is selected, click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. This will complete the condition statement.

You can select the condition statement and use the buttons below the box to add and remove conditions.

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.

Output format (Page Mode Only)

Bursting using page mode allows you to transform the document in this rule action. You can choose to leave the output format the same as the input format or change it to a format in the list.

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Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Set Document Properties tab

Use this tab to set the document properties for the documents created from splitting printer-ready documents.

This tab is used with extracting and bursting business rule actions.

- **Extract** — Line mode extracts text from line data documents using rows and columns. Page mode extracts text from printer ready documents using regions (rectangles).
- **Burst** — Line mode splits text documents based on data contained in the document. Page mode uses regions (rectangles) to determine burst conditions. Use this tab to configure the document properties on the new documents created by bursting.

Properties

Configure the document properties by clicking directly in the grid.

Document Property column — Lists the property values that can be configured. The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the print preferences/document properties that belong to that group. The first node level in the categories determine the print preferences for the properties it contains. On the print preference node, you select how the property should be applied when a document is sent to a destination. Under each print preference are the parameters needed to generate that print preference.

Mode column — Specifies how to apply the property value. Click in the cell and choose one of the following options:

- **Always Apply** — Always applies the specified property value. Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Output Manager will modify the commands to work with the printer family where the document is being sent.
- **Apply Conditionally** — Applies the property value conditionally. Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** — Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
- **Value Not Set** — No value is set for the property.

Value column — Specifies the document property value. Click directly in the cell to change the value. You can use functions to insert and extract data as necessary.

Business Rule dialog box

Use this dialog box to create and modify business rules. You can configure business rules for managing automated document processes. You can access this dialog box in the **Business Rules Manager** dialog box.

Name

Enter the name of the business rule.

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Enabled

Use the check box to enable or disable the rule. This option is enabled by default.

Description

Enter a description of the business rule. This will show in the **Business Rules Manager** dialog box.

Rule definition

Always execute this rule (no conditions) — Use this option to apply the rule to all documents. This will disable the **When** box as no condition statements are needed.

When

The **When** box is used to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group.

To create a condition, click the **<Target>** link and then click the appropriate condition. Click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. This will complete the condition statement.

You can select the condition statement and use the buttons below the box to add and remove conditions.

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements. The new condition will be added after the currently selected condition.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group. The new condition will be added to the end of the current list of conditions.

Perform the following actions

The **Perform the following actions** box is used to create and manage rule actions.

- To create an action, click the **<Action>** link and select the appropriate action type. You can create actions to do the following:

Action	Description
Assign Profiles to Document	• *Set Failover Profile* — Specifies what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). • *Set Filter Profile* — Associates a filter profile with a document. This filter will be used for document viewing and reprinting. • *Set Library Filing Profile* — Sends documents to the document library. Specifies the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting. • *Set Notification Profile* — Sends notifications when specific events occur in the document life cycle.

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Action	Description
	• *Set Output Process* — Performs processing such as search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.
Burst	• *Line Mode* — Bursts line data documents based on: data contained in the document, desired output size and size of original document, and number of output documents desired. • *Page Mode* — Splits printer ready documents based on: data contained in the document (regions are used to determine burst conditions), desired output size and size of original document, and number of output documents desired.
Extract Text	• *Line Mode* — Extracts text from line data documents using rows and columns. • *Page Mode* — Extracts text from printer ready documents using regions (rectangles).
Modify Document Contents	Runs the ADM (Advanced Document Modification) process. In this process each page of the document is read, portions of the document can be changed or values extracted, and then the page is written. This can be used as an advanced way to extract text, burst, or perform other operations on the document.
Route to Destinations	• *Advanced* — Allows you to use a CSV file to dynamically pick destinations based on a document property. • *Basic* — Specifies the destinations where documents should be sent.
Set Document Properties	Configures document properties.
Transform Document	• *Adept* — Transform documents using the Adept transform suite. • *Page Mode* — Transforms the format of a printer ready document to a new format, and/or to another data type. • *Record Mode (Advanced)* — Transforms line data from one line format to another. • *Record Mode (Basic)* — Performs the most common transforms for data coming from a Output Manager Print Server device. This converts `.tnj` to ASCII text, `.anj` to AFP, and `.bnj` to `.bin`.
Analyze Document	Processes documents and populates document properties.

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Action	Description
Assign to Document Folder	Assigns documents to specific document folders.
Convert Fixed Block to Variable Block	Converts FBA to VBA and FBM to VBM. It can be used when dealing with mainframe tape formats.
Delete Document	Deletes documents.
Move Document to File Store	Moves documents to another location (file store).
Package Banner	Adds a banner to the beginning of the package. The banner will be added as a separate document within the same package.
Power Rule	Allows you to build multiple rules inside of one rule.
Run Ad hoc Rule	Allows you to select an ad hoc rule.
Run Command	Performs a command line operation on the document.
Schedule Output	Schedules documents to print at a specific date and time.
Send Email	Sends email messages when specific events occur in the document life cycle.
Set Billing Accounts	Documentation coming soon
Set Document Owner	Configures the document owner.
Set Document State	Sets the document state to hold or ready.
Set Retain Period	Determines how long documents will be retained.
Unpackage	Separates documents that are in a package so they can act as individual documents in Nuance Output Manager. Once documents are separated, rules can be run on them individually, they can be routed individually, and so on.

- To create additional actions, click **Add Action**.
- To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

Follow-on action

Select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

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Business Rules Manager dialog box

Administrators can use the **Business Rules Manager**to create business rules. Business rules are configured by selecting an event and then configuring the document process that will be performed when that event occurs. Example business rules include routing to destinations, transforming to other print languages, assigning to document folders, and editing document properties.

Business rules grid

The business rules grid lists all of the defined business rules, in the order they will be processed. Selecting a rule will display the rule for preview below the grid. The business rules grid is editable. Use the following procedures from the rules grid.

- Use the check box in the **Enabled** column to determine if the rule is enabled or disabled.
- To change the follow-on action, click in the **Follow-on Action** cell and select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

The following buttons display below the grid.

- **Add button** — Creates a new business rule. Opens the **Business Rule** dialog box.
- **Modify button** — Modifies the selected business rule. Opens the **Business Rule** dialog box.
- **Remove button** — Deletes the selected business rule.
- **Copy button** — Creates a copy of the selected rule. To rename the rule, double-click the rule, or select the new rule and click **Modify**. Opens the **Business Rule** dialog box.
- **Move Up button** — Reorders the business rules by moving the selected rule up.
- **Move Down button** — Reorders the business rules by moving the selected rule down.

Preview for rule

Displays a preview of the selected business rule.

Configuration tab

Use this tab to configure Advanced Document Modification settings for business rules and output process actions.

In Advanced Document Modification, each page of the document is read, portions of the document can be changed or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, barcodes added, OMR marks added, and logos changed using ADM. ADM can be executed in a business rule action or in the output process.

Server configuration

Server — Specifies the licensed transform server that you would like to use.

Transform package — Specifies the transform package. You can select a transform package from the list or click **New** to create one. You can also select a transform package and modify or remove it.

Additional parameters — Specifies any additional parameters needed for the document modification software.

Override input filter profile assigned to document — Determines if you want to use the filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.

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Unit library configuration

Unit library — Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, or page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations.

- **New button** — Creates a unit library from the **Configure Unit Library** dialog box.
- **Modify button** — Modifies the selected unit library.
- **Remove button** — Deletes the selected unit library.

Unit library will create:

Important: This option is only available when configuring ADM actions for business rules.

- **the same document** — Select if your unit library is modifying the input document and writing it to the same location. See the default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created.
- **different documents** — Select if your unit library is modifying the current document and outputting it into a new document, or if your unit library is bursting the document into many different documents. See default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created
- **multiple documents combined into one** — Currently not available.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Important: Follow on actions are only available when configuring ADM actions for business rules.

Configure Columns Utility

Use the Administration application **Configure Columns Utility** to configure the columns that will display by default in the destination, source, library, and device grid views. You can add, remove, and reorder columns as necessary from the grids.

Tab pages

Displays tab pages representing the **Destinations**, **Sources**, **Library**, **Device**, **Output History** and **Document Owner** grids. Each tab displays a grid listing all of the columns that currently display in the appropriate grid. The grids are editable. Use the following procedures from the grid.

- To change the display name, click the appropriate cell in the **Display Name** column and enter the new name. Cells with a gray background cannot be edited.
- Use the **Visible in Grid** and **Editable in Grid** columns to specify if the column will display in the grid and if it will be editable. Cells with a gray background cannot be edited.
- Use the **Visible in Rules** and **Editable in Rules** columns to specify if the column will be available and editable from the **Alert Rules Manager** and the **Business Rules Manager**. Cells with a gray background cannot be edited.

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Add button

Adds columns to the grid. Displays the **Add Column** dialog box.

Remove button

Removes the selected column from the grid

Move Up button

Reorders the columns by moving the selected column up.

Move Down button

Reorders the columns by moving the selected column down.

Configure Device dialog box

Use this dialog box to configure a device in the Devices application.

Configure Document Properties Utility

Use the **Administration** application **Configure Document Properties** utility to select which print preferences/ document properties are supported throughout Nuance Output Manager. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured. When properties are disabled, those Document columns are also hidden in the Documents grids.

Grid

The **Document property** column lists the print preferences/document properties that are available to Nuance Output Manager. They are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the document properties that belong to that group. In each group, you can determine the properties that are supported throughout Nuance Output Manager. Select the check boxes in the **Allowed** column for properties you want to be available for configuration. Clear the check boxes for properties you do not want to be available.

If a property is configured by selecting from a list of options, those properties will display a drop-down arrow. Click the cell containing the arrow to display a dialog listing the available options. Select and clear the check boxes in the **Allowed** column to determine the choices that will be available when those properties are configured.

Note: Here is an example of how to configure the Resolution property so users can only select a Resolution of 75, 100, or 150. First, expand the **Basic options** category by clicking the down arrow next to the category name. Next, select the **Allowed** check box next to the **Resolution** property. This will make the property available for configuration throughout Nuance Output Manager. To configure the **Resolution** options, click the **Resolution** cell containing the drop-down arrow. In the dialog that displays, select the **Allowed** check boxes next to the options you want to be available for selection. In this example, you would select the check boxes next to 75, 100, and 150. Clear the check boxes next to the remaining **Resolution** options. Click **OK**.

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Use the **Visible in grid** and **Editable in grid** columns to specify if the column will display in the grid and if it will be editable. Cells with a shaded background cannot be edited.

Use the **Visible in rules** and **Editable in rules** columns to specify if the column will be available and editable from the **Alert Rules Manager** and the **Business Rules Manager**. Cells with a shaded background cannot be edited.

Set view order button

Sets the order that document properties will appear in grids. The **View Order** dialog box is displayed.

Refresh button

Sets all check boxes to the last saved configuration. Any unsaved changes will be lost.

Configure IP Ranges dialog box

Use this dialog box to configure IP address ranges for auto-detecting devices through SNMP. You can access the dialog box when configuring SNMP server settings through **Administration - Manage Devices**.

You configure the ranges that are associated with specific SNMP services. These are the ranges that Nuance Output Manager uses to automatically detect devices. When you manually detect devices, you can select these ranges. *Detecting devices using SNMP* on page 62 provides more information on manually detecting devices.

Import ranges from file button

Adds IP address ranges that are defined in a comma separated values (CSV) file. Verify that the values in the file are formatted as follows:

```
startAddress,endAddress,optionalComment
startAddress,endAddress,optionalComment
startAddress,endAddress,optionalComment
```

The following example shows values from a CSV file:

```
10.16.16.0,10.16.16.255,
10.16.17.0,10.16.17.255,
10.16.18.0,10.16.18.255,My favorite range
10.16.28.0,10.16.28.255,
10.16.30.0,10.16.30.255,
10.16.80.0,10.16.80.255,Common Color range
10.201.4.0,10.201.4.255,
10.201.8.0,10.201.8.255,
10.201.9.0,10.201.9.255,
```

Add single IP range

Use this section to add a single IP address range. Specify the start and end addresses and click **Add**.

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Discover domain IP ranges

Use this section to discover IP address ranges in a domain. The current domain appears by default. Network size determines how long it takes Nuance Output Manager to discover IP ranges on a domain. Discovering IP ranges takes longer on a large network.

Discover button

Change the current domain if necessary and click this button to scan the domain for IP address ranges.

The Status indicator shows the number of computers found in the Active Directory. While the scan is in progress, the indicator shows the approximate remaining scan time. The discovered IP addresses are grouped into ranges of 256 addresses (xxx.xxx.xxx.0 – xxx.xxx.xxx.255).

Stop button

Stops scanning the domain for IP address ranges.

Grid

Shows the detected IP address ranges on the domain.

Clear selected button

Clears all the ranges selected in the grid.

Clear all button

Clears all the ranges in the grid.

Export ranges to file button

Save the ranges to a CSV file. The format of the file is the same as the format described in *Import ranges from file button* on page 485.

Save button

Saves the current IP address ranges configured in the grid.

Configure Method Call dialog box

Use this dialog select a method from a DLL file to be called after the document has been transferred to its destination. This is limited to calling only public methods or instantiating public objects from the DLL file which have only basic parameter types.

You can access this dialog when configuring a Call Method output process action.

Assembly

Specifies a DLL file which contains the public method (or object to instantiate which has the method) you wish to call. You can type the path and file name in the box or click **Choose file** to locate a file.

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Type

Displays the object types. Select the type on which to make the call.

Constructor

Displays the constructors in the selected type. Select the constructor method you want to use to instantiate the object (if any). The constructor chosen must have either no parameters or only parameters of basic types (string, Boolean, and numeric – Int16, Int32, or Int64).

If the chosen constructor has parameters to be defined, specify them in the **Constructor Parameters** grid. You can also right click to select document properties or functions in the parameter values. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions.

Method

Displays the methods in the selected type. Select the method to be called. The method chosen must have either no parameters or only parameters of basic types (string, Boolean, and numeric – Int16, Int32, or Int64).

If the chosen method has parameters to be defined, specify them in the **Method Parameters** grid. You can also right click to select document properties or functions in the parameter values. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions.

Configure Transform dialog box

Use this dialog box for selecting and updating a transform. You can access this dialog box when you configure a transform action for business rules, ad hoc rules, or output processes, or when configuring an IPDS destination (not available for new sales).

Important: Nuance recommends installing Ghostscript (available as a freeware download) and Adobe Acrobat PDF Reader (or the full version of Adobe Acrobat if available) on servers that are using Nuance Output Manager transforms. These packages provide access to certain Postscript and PDF Type 1 fonts. The associated viewers are also useful for Postscript and PDF troubleshooting.

Server configuration

Server — Specifies the licensed transform server.

Transform package — Specifies the transform package. Select a transform package from the list or click **New** to create one. You can also select a transform package and modify or remove it.

Format configuration

Override input filter profile assigned to document — Determines if you want to use the filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.

Output format — Specifies the output format. Once this is selected, the input formats grid populates with the available input formats. All of the input types can also be created as output formats except LCDS, MMD, and SAP formats.

Input formats grid — Specifies the conversion for each input format. Click directly in the columns to configure the transform.

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- **Format column** — Shows the input format.

Type	File Extension	Record Format	Transform Package
PCL5	.pcl, .pcl5	Binary	All
PCL6	.pcl6	Binary	All
PDF and PDF/A	.pdf	Binary	All
Postscript	.ps, .pos	Binary	All
Text	.txt	Text*	All
Images — TIFF, JPEG, GIF, BMP, IOCA, TGA, PCX, PNG	.tiff, .jpg, .gif, .bmp, .ioca, .tga, .pcx, .png	Binary	All
AFP	.afp	AFP data in 5A records	Third party
ANJ	.anj	NJE wrapped AFP	Third party
MMD	.mmd	AFP as mixed mode data*	Third party
LCDS	.lcds, .lcd	Xerox LCDS as VBM, S/370, or TNJ	Third party
SAP	.sap	Text*	Third party
XRX	.xrx	Xerox metacode in VBM	Third party

  * Text and mixed mode AFP (MMD) documents may have a number of different record structures. Possibilities include standard ASCII text, fixed-length records (FBA or FBM) with defined record lengths, variable length records with defined delimiters, VBM, VBA, S/370, and NJE wrapped. Nuance Output Manager attempts to automatically detect the record format to perform the transform.

- **Configuration column** — Specifies if you want to use the default conversion options, use a custom set of options, or not to transform data.
- **Modify/New column** — Specifies custom transform options and command line switches. Clicking this cell displays the following tab pages listing all of the available transform options: **Input options** tab, **Output options** tab, and **Page Layout** tab. If BMP or PDF is selected as the output format, the **Bitmap output** tab or **PDF output** tab will also display. Once the transform settings are configured, the new transform configuration will be selected in the **Configuration** column.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the input document. The newly created documents (output documents) continue with the next rule action. If **Process next rule** is selected for the input document, the input document will skip the rest of the actions in the current rule and begin processing at the start of the next rule.

Warning: Follow on actions are only available when configuring transform actions for business rules.

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Configuring administrative options

The Administration application is used to configure administrative options in Nuance Output Manager. In the navigation pane, click the **Administration** button to open the Administration application. The navigation pane displays the following list of links used to configure the administrative options.

- *Configure Columns*
- Configure Document Properties
- Configure NetWeaver Integration
- *Manage License*
- *Manage Product Components*
- *Manage SNMP*
- *Manage Users*
- *Manage Windows Queues*
- *Set General Preferences*
- System Health

Connect to Output Manager Server dialog box

Use the **Connect to Output Manager Server** dialog box to select the Nuance Output Manager server you want to connect to. This dialog box displays when you open the Output Manager Console and when you open a new Nuance Output Manager Console connection.

OM server

Enter the Nuance Output Manager server where the Nuance Output Manager DBM Service is started. If you have previously connected to a server, you can select that server from the list.

Connection mode

Select the protocol for the connection between the Output Manager Console and the Nuance Output Manager server. In a high availability environment, the Output Manager Console and other clients use HTTP or HTTPS to communicate with the single Nuance Output Manager logical server through a load balancer.

Logon as

Select if you want to log on to Nuance Output Manager as the Current Windows user, an Output Manager user, an LDAP user, or for a Windows user account, a Different Windows user. If you select to log on as an OM user, LDAP user, or Different Windows user, you must complete the **User name** and **Password** boxes. The **Domain** box must be completed for the Different Windows user selection.

Remember settings

Select this check box to remember the selected configuration setting the next time you open this dialog box.

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Create Package dialog box

Use this dialog box to create a package of documents for an ad hoc rule. If you create the action from the **Ad Hoc Rule** dialog box, all of the documents that meet the specified criteria will be put in a multiple document package. If you create and run the action against documents in the Documents grid, all selected documents will be put in the package.

Naming prefix

Specifies the naming prefix for the package. This prefix will be added to all packages created by this action.

The naming prefix is especially useful when the create package action will be run by a scheduled rule. Each time the rule runs and generates a new package, the prefix will added. If you have multiple scheduled rules running that generate different packaging, you will be able to distinguish the resulting packages based on the original rule. It does not prefix any documents contained within the packages.

Grouping property

Specifies if a grouping property will be used to further divide the packaging. For the selected property, documents are grouped into packages by each unique value of that attribute. For example, you selected **Form Name** for grouping and you have 20 documents that are being packaged. In the documents, 3 have the value of "Form-A", 5 are "Form-B", 10 are "Form-C", and 2 are "Form-X". Once packaged, you will end up with 4 packages, 1 for each unique form type. All "Form-A" documents will be in their own package, "Form-B" documents in their own package, and so forth.

Ordering properties

Specifies the document properties that will control the order the documents are packaged. Expand the sections in the **Ordering properties** list to view the available document properties. As you select properties, they display in the **Selected order** list.

Note: Only the allowed properties selected in the **Configure Document Properties Utility** will display in the **Ordering properties** list.

Select properties in the **Selected order** list and use the **Move up** and **Move down** buttons to configure the property order.

Closing conditions

Important: This section is available only when the action is created from the **Ad Hoc Rule** dialog box.

Configures the closing conditions for the package. This will determine when the package is complete. You can configure one or more closing conditions.

- **Closing document** – Closes the package once the specified closing content is received. In the **Closing document action** box, choose whether to remove the closing content, add it to the current page, or add it to the next page. In the **When** box, configure the conditions for specifying the content.
- **Time elapsed since package creation** – Closes the package when a specified amount of time has elapsed since the package was created (the first document was added to the package). Specify the time period using the options next to **Elapsed time**.
- **Time elapsed since last match** – Closes the package every period of time specified. Specify the time period using the options next to **Elapsed time**.

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- **Specific time of day has occurred** – Closes the package at a specified time each day. In the **Time of day** box, specify the time.
- **Auto close** (For "Run Now" or document right-click configuration) – Closes the package (or packages when grouping) when the last target document has been packaged by the action.

Important: This option is used for running an ad hoc rule using the **Run Now** button in the **Ad Hoc Rules Manager** dialog box, or when right-clicking a document in the Documents grid and clicking a rule on the **Run Ad hoc Rule** shortcut menu.

Custom DBM Activation dialog box

Use this dialog box to select the individual Nuance Output Manager components you want to activate.

Components grid

Displays the Nuance Output Manager components available to be activated.

Select all DBM components

Selects all Nuance Output Manager components listed in the grid.

Via the Internet

Activates the Nuance Output Manager components using an Internet connection.

Deactivate DBM Components dialog box

Use this dialog box to select the individual Nuance Output Manager components you want to deactivate. If all Nuance Output Manager components are deactivated, then the license file will be uninstalled.

Components grid

Displays the installed Nuance Output Manager components. Select the components you want to deactivate.

Select all DBM components

Select this check box to select all Nuance Output Manager components listed in the grid.

Use Internet connection

Select this check box to deactivate the Nuance Output Manager components using an Internet connection.

Important: If you do not select this check box, the activation database at Nuance will not be updated. Please contact Nuance Support directly to keep the license in the correct activation status.

Department dialog box

Use this dialog box to add departments to Nuance Output Manager. Departments are particularly useful for reporting, as each user can only belong to one department. Departments are used to group Nuance Output Manager users,

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Windows users, and LDAP users. For Windows users, department membership can be retrieved from Active Directory.

Department name

Specifies the department name.

Select the users you want to add to the department

Displays all of the Nuance Output Manager users. Select the check box column for the users you want to add to this department and click the right arrow (>) button. This moves the selected users to the **Department members** grid.

Tip: To search for a name, click one of the cells in the **Name** column and then start typing the name you are searching for. You can type one letter or more letters. As you type, the first name that matches will be highlighted.

Arrow buttons

Right arrow (>) button — Moves the selected users into the **Department members** grid.

Double right arrow (>>) button — Moves all users into the **Department members** grid.

Left arrow (<) button — Removes the selected users from the department and places them back in the **Select users** grid.

Double left arrow (<<) button — Removes all users from the department and places them back in the **Select users** grid.

Department members

Displays the users that are a member of the department. To remove users from the department, select the check box column for the appropriate users and click the left arrow (<) button. This moves the selected users back into the in the **Select users** grid.

Departments tab

Use this tab to manage departments, which are network management entities used by LDAP and UNIX networks. You can specify a quota management profile to disable printing for a department under certain circumstances, set up a desktop client profile, and set a print balance for a department to control costs. Departments cannot be assigned security permissions.

Click an option you want to learn more about.

- *Users tab* on page 698
- *Groups tab* on page 550

Departments grid

From this grid, you can add and manage departments.

Full Name — Specifies the name of the department.

Quota Profile — Specifies the name of the quota management profile assigned to this department. The quota profile sets up restrictions based on the type of document, for example, precluding color printing and requiring

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that documents be duplexed. It is not required that all users in the department use the quota profile assigned to the department.

To select a profile, click the cell and select a profile from the list. To manage profiles, click the **Browse** button to open the **Manage User Quota Profiles** dialog box.

Desktop Client Profile — Specifies the name of the client profile assigned to this department. To select a profile, click the cell and select a profile from the list. To manage profiles, click the Browse button to display the **Manage Desktop Client Profiles** dialog box. The column is only visible when the Desktop Client is licensed.

Set Balance — Indicates whether a print allowance is assigned to users in this department. It is not required that all users in the department have an allowance or that they have the same allowance. From the **Users** tab, you can specify that a user not be governed by inheritance, that a user be assigned an unlimited balance (by not selecting **Set Balance**), or that a user have a different balance than the department.

Initial Balance — Specifies the print allowance for the department at the beginning of an accounting period. It is not required that all users in a department have the same initial balance. From the **Users** tab, you can specify that a user not be governed by inheritance, that a user be assigned an unlimited balance (by not selecting **Set Balance** for that user), or that a user have a different initial balance from the department. In addition, if you reset the initial balances of all department members, you can then choose whether to reset the remaining balances.

Refresh Period — Specifies the number of days in an accounting period.

Add button

Opens the **Department** dialog box so that you can add a department that is not listed.

Modify button

Displays the **Department** dialog box so that you can change information.

Remove button

Deletes the selected department.

Desktop Client Installation dialog box

This dialog box allows the Administrator to create a custom MSI (installer) file for deploying the Desktop Client to all end user machines.

You can access this dialog by clicking **Tools** > **Desktop Client Installation** on the Output Manager Console menu bar.

DBM Server Name

Specifies the DBM server name. Click the browse button (**...**) to search for a DBM server on a specific domain.

DBM Server Port

Specifies the DBM server port number.

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Backup DBM Server Name

Specifies the backup DBM server name. Click the browse button (**...**) to search for a DBM server on a specific domain.

Create Custom MSI button

Creates the MSI (installer) file. This opens the **Browse for Folder** dialog box, so you can select where you want to save the file.

Desktop Client Profile dialog box

Use this dialog box to configure desktop client profiles.

You can access this dialog box when you configure users or departments in the **Manage Users** utility on the **Users** tab or on the **Departments** tab.

Profile name

Specifies the document client profile name.

Profile description

Specifies a description of the document client profile.

General options

- **Wait for final page count before allowing printing to start** — Specifies if you want to wait for the final page count before printing.
- **Display client in system tray** — Determines if the client will display in the system tray.
- **Allow users to shut down the client and end tracking** — Gives users the ability to shut down the client and stop all tracking.

Handling of print jobs in disconnected mode

Determines how print jobs should be processed when in disconnected mode. You can choose from the following options:

- Disallow print jobs when disconnected
- Allow jobs and enforce quotas using cached information
- Allow all jobs and do not enforce quotas until reconnected

Client popup options

- **Allow batch processing of popups** — Determines if users can submit popup responses in "batch." When this check box is selected, users can specify that their responses to the Client Popup should be applied to the next *x* print jobs as well. (Where *x* is the number in the **Maximum number of jobs in this batch** box).

For example, you need to print 10 different documents and you want to bill them all to the same account. When you print the first one, you get a popup that asks you to select which account to bill this to. After you select the billing account from the drop-down, on the popup there will be an option that asks you to specify the number of print jobs to

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apply the same selections. You would specify 10. Then, for the next 9 things you print, you will not get a popup, and it will automatically bill it to that account.

- **Batch timeout(seconds)** — Specifies the batch timeout in seconds. If this timeout expires, the batch job is canceled and you will have to enter billing accounts again.
- **Batch automatically (subject to timeout)** — Specifies if you want the batch to happen automatically until the timeout expires.
- Maximum number of jobs in batch — **Specifies a maximum number of jobs in batch.**
- **Display previously selected billing accounts on popup** — Specifies if you want to display previously selected billing accounts on popup. The billing accounts you selected on your previous popup will automatically be selected in advance in the drop-down lists on the next popup. This is added for convenience if you use the same billing account many times.

Destination Capabilities dialog box

Use this dialog box to select which print preferences/document properties are supported by the destination. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured for this destination. You can access this dialog box by selecting **Destination specific capabilities** on the **More settings** tab.

Print preferences

Lists the print preferences/document properties that are available for this destination. They are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the document properties that belong to that group. In each group, you can determine the properties that are supported by this destination. Select the check boxes for properties you want to be available for configuration. Clear the check boxes for properties you do not want to be available.

If a property is configured by selecting from a list of options, those options will display beneath the property. You can select and clear the check boxes to determine the choices that will be available when those properties are configured for this destination.

Note: Here is an example of how to configure the Resolution property so users can only select a Resolution of 75, 100, or 150. First, expand the **Basic options** category by clicking the down arrow next to the category name. Next, select the check box next to the **Resolution** property. This will make the property available for configuration for this destination. Finally, under the Resolution property select the check boxes next to the options you want to be available for selection. In this example, you would select the check boxes next to 75, 100, and 150. Clear the check boxes next to the remaining Resolution options.

Destination Configuration dialog box

Use this dialog box to configure a destination.

To open this dialog box, right-click a destination and click **Configure** on the shortcut menu.

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Options

Option	Description
Name	Specifies the name of the destination.
Server	Specifies the Output Manager server where the Output Manager Output Service is located for this destination.
Comments	Provides space to enter comments about the destination.
Location	Specifies any specific location information for the destination.
Image	Displays a destination image. To change the destination image, click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller destination type image that displays in this dialog box or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.

General tabs

The following tabs specify settings for any type of destination.

Tab	Description
More settings tab (Destination Configuration) on page 506	Use this tab to configure common configuration options that available to all destination types.
Error Handling tab (Destination Configuration) on page 499	Use this tab to configure error handling options that are available to all destination types.

Source specific tabs

The following tabs provide settings for specific types of sources.

Icon	Source	Description
	AutoStore settings tab (Destination Configuration) on page 497	Configure settings on this tab for an AutoStore destination.
	Email settings tab (Destination Configuration) on page 498	Settings on this tab configure an email destination.
	Fiery device settings tab (Destination Configuration) on page 499	Use this tab to configure a fiery device destination.
	FTP settings tab (Destination Configuration) on page 501	Use this tab to configure an FTP destination.

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Icon	Source	Description
	IPDS settings tab (Destination Configuration) on page 502*	Use this tab to configure an IPDS destination.
	IPP settings tab (Destination Configuration) on page 503	Use this tab to configure an IPP (Internet Printing Protocol) destination.
	JDF/JMF settings tab (Destination Configuration) on page 504	Use this tab to configure an JDF/JMF job ticket settings.
	LPR settings tab (Destination Configuration) on page 504	Use this tab to configure an LPR destination.
	Folder settings tab (Destination Configuration) on page 500	Use this tab to configure a network folder destination.
	OM settings tab (Destination Configuration) on page 508	Use this tab to configure an Nuance Output Manager destination.
	PRISMAProduction settings tab (Destination Configuration) on page 508	Use settings on this tab to configure a PRISMAProduction destination for an Océ PRISMAproduction server.
	SharePoint device settings tab (Destination Configuration) on page 509	Use this tab to create or configure a SharePoint destination.
	Socket settings tab (Destination Configuration) on page 511	Use this tab to configure a socket destination.
	WebSphere MQ settings tab (Destination) on page 512	Use this tab to configure a WebSphere MQ destination.
	Windows queue settings tab (Destination Configuration) on page 513	Use this tab to configure a Windows queue destination.

AutoStore settings tab (Destination Configuration)

Configure settings on this tab for an AutoStore destination.

Option	Description
IP address	Specifies the IP address for the AutoStore server. • **Default value** • **Dynamic override**
Port	The port that AutoStore uses to communicate with clien ts. • **Default value**

* IPDS not available for new sales.

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Option	Description
	• **Dynamic override**

Email settings tab (Destination Configuration)

Settings on this tab configure an email destination.

Documents routed to an email destination will be sent to the email address specified. You can access this tab when you create or configure an email destination.

You can configure a default value and a dynamic override value for email field settings on this tab. The dynamic override setting allows you to specify a document property or a function that returns a value at run time.

- **Default value** — Specifies a static value that is used when no override value is returned at run time.
- **Dynamic override** — Specifies a property or function to define an email field at run time:
  - To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
  - To insert a function, right-click in this box, click **Insert Function**, and choose the function.

Option	Description
Email profile	Select the email profile that will be used with this rule. Y ou can select a profile from the list or click the browse b utton (**...**) and mange profiles in the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles.
To	Specifies the email address that will receive all documen ts sent to this destination. You can enter multiple email a ddresses separated by a comma.
CC	Specifies the email address that will be copied on this m essage. You can enter multiple email addresses separated by a comma
BCC	Specifies the email address that will be blind copied on t his message. You can enter multiple email addresses sep arated by a comma.
From	Specifies the email address that will be shown as the sen der of all documents sent to this destination.
Reply to	Specifies the email address where replies will be routed. You can enter multiple email addresses separated by a c omma.
Subject	Specifies the email message subject that will display for all documents sent to this destination.
Body	Specifies the text that will display in the email message f or all documents sent to this destination.

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Error Handling tab (Destination Configuration)

Use this tab to configure error handling options that are available to all destination types.

Use this tab to configure error handling options that are available to all destination types. You can access this tab when you create or configure a destination.

Click an option you want to learn more about.

- *Folder settings tab (Destination Configuration)* on page 500
- *More settings tab (Destination Configuration)* on page 506

Error handling profile

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document.

Use the list to select an existing error handling profile.

New — Displays the **Error Handling Profile** dialog box for creating a new error handling profile. You can configure what will happen if specific types of errors are detected via SNMP or occur while transmitting documents. You can select how many times to retry a document, determine what should happen if all of the retries fail, and whether or not to initiate document failover.

Edit — Displays the selected error handling profile's properties for modification.

Manage — Displays the **Manage Error Handling Profiles** dialog box, which lists all of the defined error handling profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Default failover destination

Failover specifies what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents) or destinations that have reported specific SNMP conditions. You can choose to route the documents to a destination group or specific destination. The parent group where the destination currently resides is selected by default.

Use parent group — Select a parent group from the list.

Use this group or destination — Use the Browse button to select a destination group or a specific destination.

Fiery device settings tab (Destination Configuration)

Use this tab to configure a fiery device destination.

Documents routed to this destination will be sent to the fiery server specified. You can access this tab when you create or configure a fiery device destination.

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

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Option	Description
Fiery server	Specifies the IP address or computer name for a Fiery se rver.
Use default port	Specifies if you want to use the default fiery port. Disabl e this option if you want to enter a specific port number.
Port	Specifies the fiery server's port number. The port numbe r must be from 1 through 65536. The default value is 80 21.
Use service logon	Specifies if you want to use the Windows credentials of t he Nuance Output Manager Output service to logon. Thi s option is disabled by default.
User name	Specifies the user name that will be used when logging o n to the fiery server.
Password	Specifies the password that will be used when logging o n to the fiery server.
Confirm password	Confirms the password entered in the **Password** box.
Logical printer	Specifies the logical printer on the fiery server that docu ments will be sent to for printing.

Folder settings tab (Destination Configuration)

Use this tab to configure a network folder destination.

Documents routed to this destination will be saved in the folder specified. You can access this tab when you create or configure a network folder destination.

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Folder settings

Folder — Specifies the path where documents will be sent. The default folder is `C:\NSi Files\`.

For the folder selected, you must configure the Nuance Output Manager Services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. Right-click the folder in Windows Explorer and click **Sharing and Security** to configure these options.

Subfolder — Specifies the subfolder path where documents will be sent. If no subfolder path is entered, documents will be sent to the folder path.

Create folder — Automatically creates the specified folder and/or subfolder if it does not exist. This will apply for default and dynamic values.

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File name — Specifies the file name the document will have when it is routed from Nuance Output Manager to its disk destination.

The following are the restrictions for the file name:

- Base file name max = 255
- Base file name min = 1
- Extension length max = 253
- Extension length min = 0 (extension is not required)

Base length — Determines the maximum length of the file name. The default length is 40.

Extension length — Determines the maximum length of the file name extension. The default length is 3.

Allow spaces — Specifies how file names that contain spaces will be written, either with the spaces or replacing the spaces with exclamation points (!). When selected and the file name contains spaces, the spaces will be preserved. When this is not selected and the file name contains spaces, the spaces will be replaced with exclamation points. This option is selected by default.

Delete exclamation — Specifies if exclamation points will be deleted from the file name.

Overwrite — Specifies how to handle duplicate file names. Selecting the check box will cause the new file to overwrite the existing file. This choice might be useful if you receive a file with the same name every day and you do not want a large number of files to accumulate on the disk. This choice saves you the work of manually deleting old files.

If you clear the check box the new file will be saved with a new file name according to the options below.

Counter type — If a duplicate file name is encountered, a new file name is created using a counter. The counter can be added to the file name In Base or In Extension.

Counter length — If a duplicate file name is encountered, this value determines the length of the numeric counter that will be placed at the end of the file name base or extension. The default length is 3.

Separator — Specifies the character that separates the file name from the counter. The default character is #. The following are invalid characters: \ / : * ? “ < > |.

Start with counter — Applies the counter to the first file. This option is selected by default. If the numeric counter is specified as In Base, the counter will be used in the base of the file name. If the numeric counter is specified as the In Extension, the counter will be used in the file name extension.

FTP settings tab (Destination Configuration)

Use this tab to configure an FTP destination.

Documents routed to an FTP destination will be sent to a specified FTP server. You can access this tab when you create or configure an FTP destination.

You can configure a default value and a dynamic override for each option on this tab. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

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Option	Description
FTP server	Specifies the FTP server, which can be an FTP or IP address.
Port	Specifies the host's port number. The port number must be from 1 through 65536. The default value is 21.
User name	Specifies the user name that will be used when logging on to the host. If the host does not require a user name, you can leave this box blank.
Password	Specifies the user password that will be used when logging on to the host. If the host does not require a user password, you can leave this box blank.
Confirm password	Confirms the password entered in the **Password** box.
Target folder	Specifies the location on the host where the files will be placed. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at `\FTP\UserName`, you can specify either `\FTP\UserName\MyDestFiles` or `\MyDestFiles`).
Use passive mode	Determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.

IPDS settings tab (Destination Configuration)

Use this tab to configure an IPDS destination.

Notice: IPDS is not available for new sales.

The IPDS destination is actually a transform operation, where the input file is transformed to an IPDS data stream and sent to an IPDS printer. You can access this tab when you create or configure an IPDS destination.

Warning: You must have a transform package licensed for the necessary input formats and for IPDS output to use IPDS destinations.

Option	Description
IPDS configuration	Click the **Create** button to create a new IPDS transform configuration. If a configuration is already selected, an **Edit** button displays. Creating or editing the configuration displays the **Configure Transform** dialog box.
Printer name	Displays the printers contained in the IPDS transform package. The printers are defined in the IPD (IPDS) filter profile on the **Filter profiles** tab. Multiple IPDS printers and connections can be configured in the same profile.

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Option	Description

	You can configure a **Default value** and a **Dynamic override** value. A default value are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.
	• **Dynamic override** — Specifies a property or function to define the server at run time:
	  • To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
	  • To insert a function, right-click in this box, click **Insert Function**, and choose the function.

IPP settings tab (Destination Configuration)

Use this tab to configure an IPP (Internet Printing Protocol) destination.

Documents routed to this destination will be sent to the specified IPP connected printer. You can access this tab when you create or configure an IPP destination.

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box and click **Insert Document Property**. This displays a menu containing a ll of the available properties. You can select a property fr om the list or type the property name. If a property is sel ected and it contains a value, that value is processed inste ad of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and choos e the appropriate function.

IPP settings

Option	Description
Printer URI	Specifies the network address of the IPP printer (for exa mple, `http://server/printers/myprinter/p rinter`).
Job name	Specifies the job name that will be associated with all do cuments received by this destination. Normally, the defa ult **Dynamic override** value will be used for the job nam e.

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Option	Description
User	Specifies the user name (document owner) that will be as sociated with all documents received by this destination. Normally, the default **Dynamic override** value will be u sed for the user name.

JDF/JMF settings tab (Destination Configuration)

Use this tab to configure an JDF/JMF job ticket settings.

Documents routed to this destination will be sent to the JDF/JMF ticket and data folders.

Option	Description
JDF version	Specifies the version of JDF used on your system.
Job submission method	• Submit ticket and data via folders, without a queue entry • Submit MIME package with queue entry, ticket and data • Submit queue entry via folder with links to ticket and data • Submit queue entry via web with links to ticket and data • Submit queue entry via web with folders for tickets and data
Ticket folder	Specifies the ticket folder for the destination.
Data folder	Specifies the data folder for the destination.

LPR settings tab (Destination Configuration)

Use this tab to configure an LPR destination.

Documents routed to this destination will be sent to the server and queue specified. You can access this tab when you create or configure an LPR destination.

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box, and click **Insert Document Property**. This displays a menu listing all of the available properties. You can select a property from t he list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and choos e the appropriate function.

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LPR settings

Option	Description
LPD server	Specifies the IP address or equivalent host name of the pr int server where documents will be sent.
Port	Specifies the port number for this LPR server. The defau lt value is 515.
Queue	Specifies the name of the print queue on the LPD server.
Retry on timeout	Specifies if you want to retry printing to this destination i f a timeout occurs.
Banner Class (-C)	Specifies the class name to be printed on the banner pag e. To print the banner page, the -L command must be us ed.
Banner Job Name (-J)	Specifies the job name to be printed on the banner page. To print the banner page, the -L command must be used.
Banner User (-L)	Causes the banner page to be printed. The user name can be omitted. The banner class (-C) and banner job name (-J) commands must precede this command in the control file to be effective.
Mail User (-M)	Sends mail to the specified mailbox (example, mailbox@ hostname) upon completion of the print job.
User (-P)	Specifies the user identification of the entity requesting t he printing job. This must be included in the control file.
Title (-T)	Provides a title for a file that is to be printed with the "p" command code. It is ignored by all other printing comm ands.
Print command	Specifies the LPR print command. You can choose one o f the following: • CIF file (-Oc) — Plots the data file while treating the data as a CIF (CalTech Intermediate Form) graphics language. • DVI file (-Od) — Prints the data file while treating the data as a DVI (TeX output) file. • Plain text (-Of) — Prints the data file as plain text, providing page breaks as necessary. Some ASCII control characters may be discarded. This is the default configuration. • Plot file (-Og) — Plots the data file while treating the data as output from the Berkeley UNIX plot library. • Literal (-Ol) — Prints the data file without filtering the control characters. • Pr (-Op) — Prints the data file with a heading, page numbers, and pagination.

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Option	Description
	• FORTRAN/ASA (-Or) — Prints the data file while interpreting the first column of each line as FORTRAN carriage control. The command also supports ASA. • Verbatim (-Ov) — Sends the data file directly to the printer without additional processing. The behavior of the directive is dependent upon the printer that the queue feeds.
Control file first	Sends the control file before the data files. Once the cont rol file has been received, the data files can be printed as they arrive. This is the default configuration.
Send copies as separate transmissions	Select this option to send documents to the destination m ultiple times (based on the copy count property of the do cument). When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have its second copy's first page print on the back of the first copy's last page. When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.

More settings tab (Destination Configuration)

Use this tab to configure common configuration options that available to all destination types.

You can access this tab in the **Destination Configuration** dialog box when you create or configure a destination.

Use advanced costing profile for reports

Advanced costing profiles define the costs associated with advanced document media and finishing options, such as stapling and folding, for reporting purposes.

Use the list to select an existing failover profile.

New — Shows the **New Advanced Costing Profile** dialog box. You can create a profile and define the costs for a specific option.

Edit — Shows the **Edit Advanced Costing Profile** dialog box for editing the profile selected in the drop-down list box.

Manage — Shows the **Manage Failover Profiles** dialog box which lists all of the defined costing profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

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Cost per page

Sets the printing cost per page for black and white and color documents. Use the spin boxes to select the printing cost.

If you want to bill less than 1 cent per page, you must change the Windows currency settings to display more than 2 decimal places. To do this, open Windows **Control Panel** and click **Regional and Language**. On the **Formats** tab, click **Additional Settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.

Include documents in Green Reports

Makes documents sent to the destination available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.

Associated device

Selects the SNMP device that will be associated with the destination. This opens the **Select Device** dialog box.

This option is available for IPP, LPR, and socket destinations.

Warning: Do not change the associated device for destinations that were created automatically.

Printer family

Printer families are used in Nuance Output Manager to configure commands for print languages and map them to destinations based on their capabilities.

Use the list to select an existing printer family.

New — Displays the **Printer Family Profile** dialog box for creating a printer family.

Edit — Displays the selected printer family properties for modification.

Manage — Displays the **Manage Printer Family Profiles** dialog box which lists all of the defined printer families. From this dialog box you can create, import, and export printer families, as well as manage all existing printer families.

Destination specific capabilities — Specifies which print preferences/document properties are supported by the destination. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured for this destination. Click **Configure** to display the **Destination Capabilities** dialog box.

Warning: To apply print preferences, you must create an output process to apply the print preferences to the destination.

Output process

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

Use the list to select an existing output process.

New — Displays the **Process Designer** window for creating a new output process. The visual flowchart style designer makes it easy and intuitive to create complex, powerful processes.

Edit — Displays the selected output process properties for modification.

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Manage — Displays the **Manage Output Process Profiles** dialog box which lists all of the defined output processes. From this dialog box you can create, import, and export processes, as well as manage all existing processes.

Override output process assigned to document — Determines if the selected output process will be used when an output process is assigned to the document.

Failover profile

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents).

Use the list to select an existing failover profile.

New — Displays the **Failover Profile** dialog box for creating a new failover profile. You can determine what should happen if all of the retries fail and when to place the document in an error state.

Edit — Displays the selected failover profile properties for modification.

Manage — Displays the **Manage Failover Profiles** dialog box which lists all of the defined failover profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Override failover profile assigned to document — Determines if the selected failover profile will be used when a failover profile is assigned to the document.

OM settings tab (Destination Configuration)

Use this tab to configure an Nuance Output Manager destination.

Documents routed to this destination will be sent a specified the Nuance Output Manager server. You can access this tab when you create or configure an Nuance Output Manager destination.

OM server

Enter the Nuance Output Manager server that will receive all documents sent to this destination.

You can configure a default value and a dynamic override value for the setting on this tab. The dynamic override allows you to specify a document property or a function that returns a value at run time.

- **Default value** — Enter an IP address or server name for the Nuance Output Manager server that will receive all documents sent to this destination.
- **Dynamic override** — Specifies a property or function to define the server at run time:
  - To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
  - To insert a function, right-click in this box, click **Insert Function**, and choose the function.

PRISMAProduction settings tab (Destination Configuration)

Use settings on this tab to configure a PRISMAProduction destination for an Océ PRISMAproduction server.

Documents routed to this destination will be sent to the specified server. You can access this tab when you create or configure a PRISMAProduction destination.

You can configure a default value and a dynamic override value for all of the settings on this tab. The dynamic override allows you to specify a document property or a function that returns a value at run time.

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Option	Description

Server	Specifies the Océ PRISMAproduction server where documents will be sent.
	• **Default value** — Enter the IP address for the server.
	• **Dynamic override** — Specifies a property or function to define the server at run time:
	  • To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
	  • To insert a function, right-click in this box, click **Insert Function**, and choose the function.

User name	Specifies the user name that is associated with the documents.
	• **Default value** — Enter a user name.
	• **Dynamic override** — Specifies a property or function to define the user name at run time:
	  • To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
	  • To insert a function, right-click in this box, click **Insert Function**, and choose the function.

Job queue	Specifies the name of the job queue where documents will be routed.
	• **Default value** — Enter a job queue name.
	• **Dynamic override** — Specifies a property or function to define the job queue at run time:
	  • To insert a document property, right-click this box and click **Insert Document Property** and select a property from one of the submenus. When the specified property contains a value, the value is used instead of the default value.
	  • To insert a function, right-click in this box, click **Insert Function**, and choose the function.

SharePoint device settings tab (Destination Configuration)

Use this tab to create or configure a SharePoint destination.

Documents routed to this destination will be sent to the SharePoint site specified.

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Option	Description
SharePoint site	Specifies the web address of the target SharePoint site (f or example, http://www.nuanceautostore.com/samplesite /).
Use service logon	Select this check box to use the Windows credentials of t he Nuance Output Manager Output service to log on. Thi s option is disabled by default.
User name	Specifies a user name to be used when logging on to the SharePoint site.
Password	Specifies the password that is associated with **User name**.
Confirm password	Confirms the password entered in the **Password** box.
SharePoint 2010 or newer	Select this check box if you are using SharePoint 2010 or newer. If selected, Nuance Output Manager will use the SharePoint 2010 Client interface to communicate with the SharePoint site. If not, Nuance Output Manager will use the SharePoint Copy Web service (`Copy.asmx`) that is supported by all versions of SharePoint. You can configure a default value and a dynamic override for each of the following options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions. • To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. • To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.
Library	Specifies the name of the library in the SharePoint site w here the files should be stored.
Folder	Specifies the name of the subfolder in the **Library**, wher e the files should be stored. If a folder is not specified, th e files will be placed in the root folder of the **Library**. T his field is optional.

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Option	Description
Document name	Specifies the name to use when naming the document on the SharePoint site. To pass the Nuance Output Manager name through, use `[Document Name]`.
Overwrite	Select this check box to overwrite a document if a document with the same name is found. If a document of the same name already exists at that location, and you choose not to overwrite, the new document will not be written to the site.
Check-in	Select this check box to mark the file as **Checked In** on the SharePoint site. If you clear this check box, a document remains checked out by the user specified in the **User name** field above.
SharePoint fields	Click this button to specify values to put in SharePoint fields or to map Nuance Output Manager fields to the SharePoint fields. SharePoint libraries have various fields or columns to describe the files stored in them. They can also have custom fields to provide further descriptive information. Some of these fields can be modified by the user.

Socket settings tab (Destination Configuration)

Use this tab to configure a socket destination.

Documents routed to this destination will be sent to the IP address and port specified. You can access this tab when you create or configure a socket destination.

Socket settings

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

IP address — Specifies the IP address or equivalent host name of the print server where the documents will be sent.

Port — Specifies the number that enables IP packets to be sent to a particular process on a computer. The default number is 9100.

Retry on timeout — Specifies if you want to retry printing to this destination if a timeout occurs.

Send copies as separate transmissions — Select this option to send documents to the destination multiple times (based on the copy count property of the document).

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When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have its second copy's first page print on the back of the first copy's last page.

When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.

WebSphere MQ settings tab (Destination)

Use this tab to configure a WebSphere MQ destination.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

Documents routed to this destination will be sent as WebSphere MQ messages. You can access this tab when you create or configure a WebSphere MQ destination.

Important: To use this destination, you must install a WebSphere MQ client separately.

WebSphere MQ settings

You can configure a default value and a dynamic override for each option. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Queue manager — Specifies the name of the queue manager. This must match the queue manager specified in WebSphere MQ. The queue manager administers the queues that have been created on it (these are known as local queues).

Queue name — Specifies the queue name where messages sent to this destination will be stored. This must match the queue name specified in WebSphere MQ. The queue name along with the name of its queue manager, provides a unique address where messages can be sent.

Channel name — Each WebSphere MQ queue manager has different types of connectivity options. Since Nuance Output Manager uses TCPIP for the channel connection, you must specify the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.

Warning: Make sure the SSL certificate required option is not selected in WebSphere MQ. Nuance Output Manager does not support this at this time.

Connection name — Specifies the connection name. The connection name is the IP address and (port) or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue.

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Windows queue settings tab (Destination Configuration)

Use this tab to configure a Windows queue destination.

Documents routed to this destination will be sent to the print server and queue specified. You can access this tab when you create or configure a Windows queue destination.

Option	Description
Print server	Specifies the print server where documents will be sent.
Print queue	Specifies the name of the print queue.

Destination Configuration (bulk settings) dialog box

Use bulk destination settings to simultaneously configure multiple devices with the same destination settings.

The bulk destination settings are displayed on tabs in the **Destination Configuration** dialog box when you specify to add more than one device in the **Add Destination** dialog box. Bulk destination settings allow you to simultaneously configure the same values for settings for multiple devices.

General tabs

The following tabs provide general settings for any type of destination.

Tab	Description
General tab (Destination Bulk Configuration) on page 521	Use settings on this tab to configure general destination information when creating multiple destinations.
More settings tab (Destination Bulk Configuration) on page 525	Configure common configuration options that available to all destination types.
Error Handling tab (Bulk Configuration) on page 516	Use this tab to configure error handling options that available to all destination types.

Buttons

Button	Description
Select all	Selects all of the destinations listed in the grid.
Unselect all	Clears any selected destinations in the grid.
Add	Adds a destination to the grid. A new row will appear at t he bottom of the grid.
Copy	Creates a copy of the destination selected in the grid. A n ew row will appear at the bottom of the grid.
Remove	Deletes the selected destination.
Series Fill	Fills multiple selected fields in a column with the specified text and counter. This option is useful when

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Button	Description
	you have several destinations using similar naming conventions (such as name, folder, and location). To create a series fill, select the rows you want to automatically fill, and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog box. The series will start with the first selected row.
Configure device	Click this button to open the **Device Configuration** dialo g box to configure a selected device.

Source specific tabs

The following tabs provide settings for specific types of sources.

Icon	Source	Description
	Email settings tab (Destination Bulk Configuration) on page 515	Use settings on this tab to simultaneously create multiple email. Documents routed to these destinations will be sent to the email addresses specified.
	Fiery Device settings tab (Bulk Configuration) on page 517	Use this tab to simultaneously configure multiple fiery device destinations.
	Folder settings tab (Destination Bulk Configuration) on page 518	Configure settings on this tab to simultaneously create multiple network folder destinations. Documents routed to this destination will be saved in the folder specified.
	FTP settings tab (Destination Bulk Configuration) on page 520	Use this tab to create multiple FTP destinations at once. Documents routed to this destination will be sent to the FTP servers specified.
	IPP settings tab (Destination Bulk Configuration) on page 521	Configure settings on this tab to simultaneously create multiple IPP (Internet Printing Protocol) destinations. Documents routed to this destination will be sent to the specified IPP connected printer.
	JDF/JMF settings tab (Destination Bulk Configuration) on page 522	Use this tab to configure bulk destination settings for JDF/JMF job ticket settings.
	LPR settings tab (Destination Bulk Configuration) on page 523	Use this tab to create multiple LPR destinations at once. Documents

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Icon	Source	Description
		routed to this destination will be sent to the server and queue specified.
	OM Settings tab (Destination Bulk Configuration) on page 526	Use this tab to configure multiple Nuance Output Manager destinations at once.
	PRISMAProduction settings tab (Destination Bulk Configuration) on page 526	Use this tab to configure multiple PRISMAProduction destinations at once.
	Socket settings tab (Destination Bulk Configuration) on page 527	Configure settings on this tab to create simultaneously multiple socket destinations. Documents routed to these destinations will be sent to the IP address and port specified.
	WebSphere MQ settings tab (Destination Bulk Configuration) on page 527	Use settings on this tab to simultaneously create multiple WebSphere MQ destinations. Documents routed to these destinations will be sent as WebSphere MQ messages.
	Windows Queue settings tab (Destination Bulk Configuration) on page 528	Use settings on this tab to create multiple Windows queue destinations at once. Documents routed to these destinations will be sent to the print server and queue specified.

Email settings tab (Destination Bulk Configuration)

Use settings on this tab to simultaneously create multiple email. Documents routed to these destinations will be sent to the email addresses specified.

Click on cells in the table to configure a destination.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using OM functions* help topic for information on configuring functions.

Column	Description
Name column	Specifies the name of the email destination.
Email profile	Selects the email profile that will be used with this rule. You can select a profile from the list or click the Browse button and mange profiles from the **Manage Outbound**

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Column	Description
	Email Profiles. From this dialog box you can create and modify email profiles.
To	Specifies the email address that will receive all documen ts sent to this destination. You can enter multiple email a ddresses separated by a comma.
CC	Specifies the email address that will be copied on this m essage. You can enter multiple email addresses separated by a comma.
BCC	Specifies the email address that will be blind copied on t his message. You can enter multiple email addresses sep arated by a comma
From	Specifies the email address that will be shown as the sen der of all documents sent to this destination.
Reply to	Specifies the email address where replies will be routed. You can enter multiple email addresses separated by a c omma.
Subject	Specifies the email message subject that will display for all documents sent to this destination.
Body	Specifies the text that will display in the email message f or all documents sent to this destination.

Error Handling tab (Bulk Configuration)

Use this tab to configure error handling options that available to all destination types.

You can access this tab when you create multiple destinations simultaneously.

Click in the table cells to configure values for a destination.

Column	Description
Name	Specifies the name of the destination.
Error Handling Profile	Specifies the error handling profile. Error handling profil es specify what should happen to destinations when an e rror is detected via SNMP or during transmission of a do cument. You can select an error handling profile from t he list or click the Browse button to create or manage pr ofiles from the **Manage Error Handling Profiles** dialo g box.
Default Failover Destination Type	Specifies the type of failover to use for the destination. F ailover specifies what should happen to documents when they are sent to inaccessible destinations (they are not ab le to receive documents). You can choose to route the do cuments to a destination group or specific destination. T

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Column	Description
	he parent group where the destination currently resides i s selected by default.
Default Failover - Parent	Specifies failover documents will be routed to a parent gr oup. Select a group in the list.
Default Failover - Specific	Specifies failover documents will be routed to a specific destination or destination group. Use the Browse button t o select a destination or group.
Set Ready Documents to Hold On Startup	

Fiery Device settings tab (Bulk Configuration)

Use this tab to simultaneously configure multiple fiery device destinations.

Documents routed to this destination will be sent to the fiery server specified. You can access this tab when you create or configure multiple fiery device destinations.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box and click **Insert Document Property**. This displays a menu containing a ll of the available properties. You can select a property fr om the list or type the property name. If a property is sel ected and it contains a value, that value is processed inste ad of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and cho ose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in columns to configure values for a destination.

Column	Description
Name	Specifies the name of the fiery device destination.
Fiery Server	Specifies the fiery server, which can be a server name or IP address.
Use Default Port	Select the **Default** check box to use the default port. Dis able this option to configure the port settings. When this check box is cleared, you can enter a document property or function that returns a true or false value (1/0 or True/ False).

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Column	Description
Port	Specifies the fiery server's port number. The port numbe r must be from 1 through 65536. The default value is 80 21.
Use Service Logon column	Specifies if you want to use the Windows credentials of t he Nuance Output Manager Output service to logon. Thi s option is disabled by default.
User name column	Specifies the user name that will be used when logging o n to the fiery server.
Password column	Specifies the password that will be used when logging o n to the fiery server.
Confirm Password column	Confirms the password entered in the **Password** column.
Logical Printer column	Specifies the logical printer on the fiery server that docu ments will be sent to for printing.

Folder settings tab (Destination Bulk Configuration)

Configure settings on this tab to simultaneously create multiple network folder destinations. Documents routed to this destination will be saved in the folder specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box and click **Insert Document Property**. This displays a menu containing a ll of the available properties. You can select a property fr om the list or type the property name. If a property is sel ected and it contains a value, that value is processed inste ad of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and cho ose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

Column	Description
Name column	Specifies the name of the network folder destination.
Folder column	Specifies the path where documents will be sent. The de fault folder is `C:\NSi Files\`. Click the browse butt on (**...**) to select a folder. For the folder selected, you mu st configure the Nuance Output Manager Services logon account user name to have Full Control Sharing permissi

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Column	Description
	ons. Also verify the Administrators group has Full Contr ol Security permissions. Right-click the folder in Windo ws Explorer and click **Sharing and Security** to configur e these options.
Subfolder column	Specifies the subfolder path where documents will be se nt. If no subfolder path is entered, documents will be sen t to the folder path.
Create folder	Automatically creates the specified folder and/or subfold er if it does not exist. This will apply for default and dyn amic values.
File Name column	Specifies the file name the document will have when it i s routed from Nuance Output Manager to its disk destina tion.
Base Length column	Determines the maximum length of the file name. The de fault length is 40.
Extension Length column	Determines the maximum length of the file name extensi on. The default length is 3.
Allow Spaces column	Specifies how file names that contain spaces will be writ ten, either with the spaces or replacing the spaces with e xclamation points (!). When selected and the file name c ontains spaces, the spaces will be preserved. When this i s not selected and the file name contains spaces, the spac es will be replaced with exclamation points. This option i s selected by default.
Delete Exclamation column	Specifies if exclamation points will be deleted from the f ile name.
Overwrite column	Specifies how to handle duplicate file names. Selecting t he check box will cause the new file to overwrite the exi sting file. This choice might be useful if you receive a fil e with the same name every day and you do not want a la rge number of files to accumulate on the disk. This choic e saves you the work of manually deleting old files. If yo u clear the check box the new file will be saved with a ne w file name according to the options below.
Counter Type column	If a duplicate file name is encountered, a new file name i s created using a counter. The counter can be added to th e file name base or extension.
Counter Length column	If a duplicate file name is encountered, this value determ ines the length of the numeric counter that will be placed at the end of the file name base or extension. The defaul t length is 3.

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Column	Description
Separator column	Specifies the character that separates the file name from t he counter. The default character is #. The following are invalid characters: \ / : * ? “ < > |.
Start With Counter column	Applies the counter to the first file. If the numeric count er is specified as the base, the counter will be used in the base of the file name. If the numeric counter is specified as the extension, the counter will be used in the file nam e extension.

FTP settings tab (Destination Bulk Configuration)

Use this tab to create multiple FTP destinations at once. Documents routed to this destination will be sent to the FTP servers specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box, and click **Insert Document Property**. This displays a menu containing a ll of the available properties. You can select a property fr om the list or type the property name. If a property is sel ected and it contains a value, that value is processed inste ad of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and cho ose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click directly in table cells to configure values for a destination.

Column	Description
Name	Specifies the name of the FTP destination.
FTP Server	Specifies the FTP server, which can be an FTP or IP add ress.
Port	Specifies the host's port number. The port number must b e from 1 through 65536. The default value is 21.
User Name	Specifies the user name that will be used when logging o n to the host. If the host does not require a user name, yo u can leave this cell blank.
Password	Specifies the user password that will be used when loggi ng on to the host. If the host does not require a user pass word, you can leave this cell blank.

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Column	Description
Target Folder	Specifies the location on the host where the files will be placed. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at `\FTP\UserName`, you can specify either `\FTP\UserName\MyDestFiles` or `\MyDestFiles`).
Use Passive Mode	Determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.

General tab (Destination Bulk Configuration)

Use settings on this tab to configure general destination information when creating multiple destinations.

Click in table cells to configure values for a destination.

Column	Description
Name	Specifies the name of the destination.
Server	Specifies the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this destination.
Location	Specifies any specific location information for the destination.
Comments	Lists any general comments about the destination.

IPP settings tab (Destination Bulk Configuration)

Configure settings on this tab to simultaneously create multiple IPP (Internet Printing Protocol) destinations. Documents routed to this destination will be sent to the specified IPP connected printer.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance*

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To	Do this
	Output Manager Functions help topic for information on configuring functions.

Click in table cells to configure vales for a destination.

Column	Description
Name column	Specifies the name of the IPP destination.
Printer URI column	Specifies the network address of the IPP printer (for exa mple, `http://server/printers/myprinter/p rinter`).
Job Name column	Specifies the job name that will be associated with all do cuments received by this destination. Normally, the defa ult **Dynamic** value will be used for the job name.
User column	Specifies the user name (document owner) that will be a ssociated with all documents received by this destination . Normally, the default **Dynamic** value will be used for t he user name.

JDF/JMF settings tab (Destination Bulk Configuration)

Use this tab to configure bulk destination settings for JDF/JMF job ticket settings.

Documents routed to this destination will be sent to the JDF/JMF ticket and data folders.

Click on table cells to edit values for a destination.

Column	Description
JDF version	Specifies the version of JDF used on your system.
Job submission method	• Submit ticket and data via folders, without a queue entry • Submit MIME package with queue entry, ticket and data • Submit queue entry via folder with links to ticket and data • Submit queue entry via web with links to ticket and data • Submit queue entry via web with folders for tickets and data
URL	
Ticket folder	Specifies the ticket folder for the destination.
Data folder	Specifies the data folder for the destination.

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LPR settings tab (Destination Bulk Configuration)

Use this tab to create multiple LPR destinations at once. Documents routed to this destination will be sent to the server and queue specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

To	Do this
Insert document properties	Right-click in the desired override box, and click **Insert Document Property**. This displays a menu listing all of the available properties. You can select a property from t he list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
Insert functions	Right-click in the box, click **Insert Function**, and cho ose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

Column	Description
Name	Specifies the name of the LPR destination.
Print Command	Specifies the LPR print command. You can choose one o f the following. • CIF file (-Oc) — Plots the data file while treating the data as a CIF (CalTech Intermediate Form) graphics language. • DVI file (-Od) — Prints the data file while treating the data as a DVI (TeX output) file. • Plain text (-Of) — Prints the data file as plain text, providing page breaks as necessary. Some ASCII control characters may be discarded. This is the default configuration. • Plot file (-Og) — Plots the data file while treating the data as output from the Berkeley UNIX plot library. • Literal (-Ol) — Prints the data file without filtering the control characters. • Pr (-Op) — Prints the data file with a heading, page numbers, and pagination. • FORTRAN/ASA (-Or) — Prints the data file while interpreting the first column of each line as FORTRAN carriage control. The command also supports ASA. • Verbatim (-Ov) — Sends the data file directly to the printer without additional processing. The behavior

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Column	Description
	of the directive is dependent upon the printer that the queue feeds.
Send copies as separate transmissions	Select this option to send documents to the destination m ultiple times (based on the copy count property of the do cument). When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have the first page of its second copy print on the back of the last page of its first copy. When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.
Control File First	Sends the control file before the data files. Once the cont rol file has been received, the data files can be printed as they arrive. This is the default configuration.
Server	Specifies the IP address or equivalent host name of the pr int server where documents will be sent.
Port	Specifies the port number for this LPR server. The defau lt value is 515.
Queue	Specifies the name of the print queue on the LPD server.
Retry On Timeout	Specifies if you want to retry printing to this destination i f a timeout occurs.
Banner Class (-C)	Specifies the class name to be printed on the banner pag e. To print the banner page, the -L command must be us ed.
Banner Job Name (-J)	Specifies the job name to be printed on the banner page. To print the banner page, the -L command must be used.
Banner User (-L)	Causes the banner page to be printed. The user name can be omitted. The banner class (-C) and banner job name (-J) commands must precede this command in the control file to be effective.
Mail User (-M)	Sends mail to the specified mailbox (example, mailbox@ hostname) upon completion of the print job.
User (-P)	Specifies the user identification of the entity requesting t he printing job. This must be included in the control file.

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Column	Description
Title (-T)	Provides a title for a file that is to be printed with the "p" command code. It is ignored by all other printing comm ands.

More settings tab (Destination Bulk Configuration)

Configure common configuration options that available to all destination types.

You can access this tab when you simultaneously configure multiple destinations.

Click in table cells to configure values for a destination.

- **Name** column — Specifies the name of the destination.
- **Use advanced costing** — Determines if Nuance Output Manager applies advanced costing to the destination. Examples of advanced costing include costs associated with stapling documents.
- **Advanced Costing** — Specifies the advanced costing profile that Nuance Output Manager applies to the destination. Select a profile or create one from the **Manage Advanced Costing Profiles** dialog box.
- **B&W Cost** column — Specifies the printing cost per page for black and white documents.

If you want to bill less than 1 cent per page, change the Windows currency settings to display more than 2 decimal places. To do this, open **Control Panel** and click **Region and Language**. On the **Formats** tab, click **Additional settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.

- **Color Cost** column — Specifies the printing cost per page for color documents.

If you want to bill less than 1 cent per page, change the Windows currency settings to display more than 2 decimal places. To do this, open **Control Panel** and click **Region and Language**. On the **Formats** tab, click **Additional settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.

- **Include Documents In Green Reports** column — Specifies if documents sent to the destination are available for green reports. The documents appear in green reports once Nuance Output Manager deletes them from the **Retained** tab.
- **Associated Device** column — Selects the SNMP device that will be associated with the destination. This opens the **Select Device** dialog box. This option is available for IPP, LPR, and socket destinations.

Warning: Do not change the associated device for destinations that were created automatically.

- **Printer Family** column — Specifies the printer family profile to use. Printer families are used in Nuance Output Manager to configure commands for print languages and map them to destinations based on their capabilities. You can select a printer family profile from the list or click the browse button (**...**) to create or manage profiles from the **Manage Printer Family Profiles** dialog box.
- **Output Process** column — Specifies if you want to use an output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an output process from the list or click the browse button (**...**) to create or manage profiles from the **Manage Output Process Profiles** dialog box.
- **Override Document Output Process** column — Determines if the selected output process will be used when an output process is assigned to the document.
- **Failover Profile** column — Specifies if you want to use a failover profile. Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they are not able to receive documents). You can select a failover profile from the list or click the browse button (**...**) to create or manage profiles from the **Manage Failover Profiles** dialog box.

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- **Override Document Failover Profile** column — Determines if the selected failover profile will be used when a failover profile is assigned to the document.

OM Settings tab (Destination Bulk Configuration)

Use this tab to configure multiple Nuance Output Manager destinations at once.

Documents routed to these destinations will be sent to the specified Nuance Output Manager server.

Column	Description
Name	Specifies the name of the Nuance Output Manager destination.
Server	Specifies the Nuance Output Manager server that will receive all documents sent to this destination. You can configure a default value and a dynamic override value for this option. The Default value is used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default value using document properties and functions. • To enter an dynamic override value, right-click in the Dynamic cell and click **Insert Document Property**. This displays a menu containing all of the available properties. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value. • To insert functions, right-click in the Dynamic cell, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

PRISMAProduction settings tab (Destination Bulk Configuration)

Use this tab to configure multiple PRISMAProduction destinations at once.

These destinations are configured for the Océ PRISMAproduction server. Documents routed to these destinations will be sent to the servers specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

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Column	Description
Name	Specifies the name of the PRISMAProduction destinatio n.
Server	Specifies the Océ PRISMAproduction server where docu ments will be sent.
User name	Specifies the user name that is associated with the docum ents.

Socket settings tab (Destination Bulk Configuration)

Configure settings on this tab to create simultaneously multiple socket destinations. Documents routed to these destinations will be sent to the IP address and port specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

- **Name** column — Specifies the name of the socket destination.
- **Send copies as separate transmissions** — Select this option to send documents to the destination multiple times (based on the copy count property of the document).

When printing a duplex document, select this option if you want each document to print on its own sheets of paper. If not selected, a duplexed document that has odd number of pages will have its second copy's first page print on the back of the first copy's last page.

When a printer is configured to use a separator page, select this option to allow the separator page to be inserted by the printer. If not selected, only the first copy would have a separator page. A separator page would not appear between each of the copies.

- **IP Address** column — Specifies the IP address or equivalent host name of the print server where the documents will be sent.
- **Port** column — Specifies the number that enables IP packets to be sent to a particular process on a computer. The default number is 9100.
- **Retry On Timeout** column — Specifies if you want to retry printing to a destination if a timeout occurs.

WebSphere MQ settings tab (Destination Bulk Configuration)

Use settings on this tab to simultaneously create multiple WebSphere MQ destinations. Documents routed to these destinations will be sent as WebSphere MQ messages.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

Important: To use this destination, you must install a WebSphere MQ client separately.

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You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

- **Name** column — Specifies the name of the WebSphere MQ destination.
- **Queue manager** column — Specifies the name of the queue manager. This must match the queue manager specified in WebSphere MQ. The queue manager administers the queues that have been created on it (these are known as local queues).
- **Queue name** column — Specifies the queue name where messages sent to this destination will be stored. This must match the queue name specified in WebSphere MQ. The queue name along with the name of its queue manager, provides a unique address where messages can be sent.
- **Channel name** column — Each WebSphere MQ queue manager has different types of connectivity options. Since Nuance Output Manager uses TCPIP for the channel connection, you must specify the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.

Note: Make sure the SSL certificate required option is not selected in WebSphere MQ. Nuance Output Manager does not support this at this time.

- **Connection name** column — Specifies the connection name. The connection name is the IP address and (port) or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue.

Windows Queue settings tab (Destination Bulk Configuration)

Use settings on this tab to create multiple Windows queue destinations at once. Documents routed to these destinations will be sent to the print server and queue specified.

You can configure a default value and a dynamic override for most options. Default values are used to manage the documents as they are being sent to the destination. You can choose to dynamically override the default values using document properties and functions.

- To insert document properties, right-click in the desired override box and click **Insert Document Property**. A menu containing all of the available properties displays. You can select a property from the list or type the property name. If a property is selected and it contains a value, that value is processed instead of the default value.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Click in table cells to configure values for a destination.

Column	Description
Name	Specifies the name of the Windows queue destination.
Print Server	Specifies the print server where documents will be sent.
Print Queue	Specifies the name of the print queue.

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Destination/Device Output and SNMP Alert History window

Use the **Destination/Device Output and SNMP Alert History** window to view the following:

- From the Destinations application, the output history of destinations and folders
- From the Devices application,
  - The output history of devices and folders
  - The SNMP alert history of devices and folders

You can choose from one of the predefined history time frames or create a custom query. You can limit the data saved in history in the **Set General Preferences Utility**.

Tree

Displays all destinations and destination folders or devices and devices folders. Selecting a destination/device or folder will display the history in the grid according to the selected history time frame.

You can search the tree using the controls in the search panel below the tree. To search, type the text you want to find and press Enter or click the Search button.

History time frame

Specifies the history time frame. You can select to view the output in the last hour, today, last 24 hours, last 7 days, last 14 days, this month, this year, or create a custom query. Selecting custom query displays the query tool.

Grid

Displays the history for the selected destination/device or folder according to the time frame specified. The grid view can display a maximum of 5000 records. If more than 5000 records exist, navigation images below the grid will enable to allow paging through the records.

The following options are available below the grid:

- **Search** — Searches the grid columns. To search, type the text you want to find in the search box, click the column in the grid you want to search, and then press Enter or click the **Search** button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.
- **Print** — Prints the output/alert history.
- **Query** — Displays the query tool for creating a custom query.
- **Help** — Displays help.
- **Refresh Query** — Updates the history data.
- **Page navigation** — Allows for paging through the records. You can select to view the first page, previous page, next page, or last page.
- **Records** — Displays the number of records in the grid.

Detect Readers dialog box

Use this dialog box to search for any Ethernet Card Readers within an IP address range.

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Start

Specifies the start of the IP address range. The search begins with this IP address.

End

Specifies the end of the IP address range. The search ends at this IP address.

Device Configuration dialog box

Use the device configuration dialog box to configure properties for a device.

Open this dialog box by right-clicking a device in the **Devices** application and then clicking **Configure** on the shortcut menu.

Table 9: Dialog options

Option	Description
Device name	Shows the current network (DNS) name for the device. T his is a read-only field.
Manufacture	Shows the manufacture for the device. This is a read-onl y field.
Model	Shows the model for the device. This is a read-only field.
IP Address	Specifies the IP address for the device.
DNS Name	Specifies the DNS name for the device.
Serial number	Specifies the serial number for the device.

Dialog tabs

Click in this table to view information about a tab.

Table 10: Tabs

Tab	Description
SNMP	Use options on this tab to configure updates Output Manager destinations that are auto-detected SNMP devices.
Device Details	Use this tab to configure embedded client setting for a device.
Kiosk	This tab associates kiosks to a device.
Job Status	This tab allows you to enable and configure options for tracking jobs. Not displayed for Konica Minolta devices.

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SNMP tab (Device Configuration)

Use options on this tab to configure updates Output Manager destinations that are auto-detected SNMP devices.

You can determine whether the Output Manager SNMP Service will automatically update destinations that are auto-detected SNMP devices. The service can update dynamic, static, and meter values. Dynamic values are values that can change while the printer is being used, such as out of paper and low on toner. Static values are values that do not change or change very infrequently, such as the printers name and IP address. In most cases, updating static values is less important than updating dynamic values, as static values change less frequently. Dynamic value updates are needed to maintain timely alerts so a device can stay operational. Meter values track information about how many copies, prints, faxes, scans, and so forth have been made.

Option	Description
SNMP server	Specifies the network (DNS) name for the server.
SNMP community	The SNMP community name used to communicate with the server.
Update dynamic values	Select this check box to automatically update dynamic v alues for a device.
Update static values	Select this check box to automatically update static value s for a device.
Update meter values	Select this check box to automatically update SNMP me tering values.
Use PJL during update	Use PJL (Printer Job Language) for the update. You can select this option if PJL is supported on a device.
Code page	The code page used by the hardware.
Override global SNMP v3 settings	Select this check box to override the global settings for t he SNMP server. After you select this check box, config ure the **Device SNMP v3 settings**.

Device SNMP v3 settings

Option	Description
User	A valid user name for authenticating the user on the SN MP server.
Context name	The context name to use for the SNMP user.
Authentication password	The authentication password the SNMP user.
Protocol	The authorization protocol to use for authenticating the u ser (MD5 or SHA).
Encryption password	The encryption password for the user.
Algorithm	The algorithm used to encrypt the password (DES, AES, DES3, AES192, or AES256).

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Device Details tab (Device Configuration)

Use this tab to configure embedded client setting for a device.

You can access this tab from the Devices application when you right-click a device and click **Configure device**.

Secure release type

Specifies the client type for the device.

SN

Specifies the serial number of the client type for the device.

IP addr

Specifies the IP address of the client type for the device.

Firmware

Specifies the firmware version for the device.

Update

Allows you to browse and update the firmware for the device.

Cost Management

These options configure cost management for the embedded client.

Option	Description
Track	Select the check box for each type of usage you want to t rack. Some options may not be available for a device. • **Prints** (unavailable for Konica Minolta devices) • **Scans** • **Copies** • **Fax Transmissions** (unavailable for Konica Minolta devices)
Polling interval	Specifies the interval in *hh*:*mm*:*ss* that Output Manager q ueries the device for information.
Use SSL	Select this check box to use the Secure Sockets Layer (S SL) protocol instead of an unencrypted connection to qu ery the device.
Cost per page	Specifies the page cost for scans, copies (B&W and Col or), and faxes. Some options may not be available for a d evice. • **Scans** • **Copies B&W** • **Copies Color**

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Option	Description
	• **Faxes** (unavailable for Konica Minolta devices)

3rd party card reader

The **3rd party card reader** check box is selected when a RF IDeas Ethernet 241 Card Reader is configured and licensed to Output Manager for the device.

Unified Client

Select the **Unified client** check box to enable the Unified Client for the device.

Option	Description
Configure access control	Select this check box to configure access control for the device. Access control enables an administrator to configure access to specific features of an MFD, such as restricting a users to making only black and white copies on a particular MFD. To support this feature, an MFD must provide API support for access control.
Print Preferences	Specify a Kiosk preference profile for the device. You c an click **New** to create a new profile, **Edit** to edit the cur rently selected profile, or **Manage** to work with all profi les.

Kiosk tab (Device Configuration)

This tab associates kiosks to a device.

When a kiosk is associated with a device, users using the kiosk are able to route documents to the associated device.

Option	Description
Associated kiosks with this device	Select the check box next to a kiosk in this list to associa te the kiosk with the device.

Job Status tab (Device Configuration)

This tab allows you to enable and configure options for tracking jobs.

Note: This tab is not displayed for Konica Minolta devices.

Option	Description
Track job status	Select this check box to enable tracking for the destinati on if this feature is supported for the destination, usually destinations for devices that support JBA (job based acc ounting).

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Option	Description
Polling interval for job status information	Specifies the interval in *hh*:*mm*:*ss* between queries to the server for job status information.
Re-cost document based on accounting feedback from printer	Use accounting information from the printer to calculate costs shown in the logging information.
Assign job status profile	Specifies the job status profile that maps status values to columns in the status logs. The default mapping is used i f you do not select a profile. Click the **New** button to map values to columns in a new profile. Click **Manage** to open the **Manage Job Status Mapping Profiles** dialog box to manage all job status profiles.
Job status via private MIB	Clear the **Disabled** check box to auto-detect the manage ment information base on your system to monitor objects provided Output Manager.
Read job status from printer	Specifies to read job status information from the printer s upplied in a **Logfile** or in a **Database**. Choosing either of these options enables additional options that you must co nfigure so that Output Manager can access information fr om the log file or database.

Konica Minolta iOption devices

You only need to configure settings on this tab for Konica Minolta iOption devices when IPP destinations are used and you wish to track print job status via IPP.

This only works with printers that support RFC 2910, RCF 2911, and IPP/1.1.

In that case, use the following settings:

- Select the **Track job status** check box.
- Select the **IPP Default Job Status** profile.
- Clear the **Read job status from printer** check box.

The easiest way to confirm that this feature is working correctly is to clear the **Track Print** check box on the **Device Details** tab, and to enable the IPP job status on this tab. Then, send a print job to the printer, and run a report to see that the job accounting data was captured. If it does not get captured, clear the **Track job status** check box on this tab, and select the **Track Print** check box on the **Device Details** tab.

Restriction: Output Manager tracks and reports on all documents it sends to Konica Minolta devices, but the **Job Status** tab is hidden by default for these devices due to potential inconsistencies in the information we receive when print tracking is enabled.

Device Profile dialog box

Use this dialog box to configure a device profile. Device profiles consist of configuring billing account prompts. Billing account prompts can be configured to occur at login or before releasing jobs.

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Option	Description
Profile name	Enter a name to identify the profile in this box. This n ame will appear as a selectable item for the user in the **Device Profile** column of the general user properties and in in the **Manage Device Profiles** dialog box.
Profile description	Provides space to briefly document the purpose of the pr ofile. This description shows for a profile in the **Manage Device Profiles** dialog box.
Immediately release user's documents when authenticated via Card swipe at MFP	Select this check box to print all pending documents that belong to a user immediately after the user authenticates using the card reader attached to an MFP. The user will not be able to select individual documents to print while this option is selected.
Prompt for billing accounts before releasing jobs	Select this check box to prompt for billing accounts befo re releasing jobs. You can select up to three billing lists t o be displayed before releasing print jobs.
Prompt for billing accounts at login	Select this check box to prompt for billing accounts whe n a user logs into Output Manager. You can select up to t hree billing lists to be displayed at login.
Active	Select this check box to make a list active and available t o users.
Caption	Specifies the caption that identifies the account to users.
Input type	Specifies how users specify a billing account. • Drop Down — User selects the billing account caption account on a drop-down list. • Write In — User types in the name of the billing account caption. • Drop Dow with Write In — User can type a billing account caption or click a caption on a drop-down list.
Billing list	Specifies the default billing list displayed to a user.

Device wizard

Use the device wizard to convert Windows queues to sources or destinations, to detect devices, or to restore previously converted Windows queues.

Click the links on this page for detailed instructions.

Task	Description
Convert Windows Queues on one or more Print Servers	Converts Windows queues to sources and/or destinations . All documents sent to the Windows queue will be recei

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Task	Description
	ved in Nuance Output Manager through the new source, rather than going to the printer. If desired, you can choos e to create an Nuance Output Manager destination for th e queue. Nuance Output Manager will automatically conf igure the source to route to the destination. This is useful because no change will appear to the end users - they wil l print and receive their documents as usual.
Convert using Advanced mode	Converts Windows queues to sources and/or destinations using an advanced configuration method.
Detect devices via SNMP	Detects printers using SNMP. Printers can be detected on all servers that have the Output Manager SNMP Service installed. Once printers are detected, they can then be co nfigured as Nuance Output Manager destinations.
Restore previously converted Windows Queues	Restores Windows queues that were converted to Nuance Output Manager sources.

Document Library Profile dialog box

Use this dialog box to configure library profiles. Library profiles specify what to do with associated documents when they are routed to the Nuance Output Manager library. The profile specifies the library folder where documents will be sent, the file store, any notifications, and how long to keep documents before deleting.

You can access this dialog box when you configure the document library destination, create a business rule with a library filing profile, or assign a library filing profile from the Documents grid.

Name

Specifies the library profile name.

Description

Specifies a description of the library profile.

File documents in library

Specifies where documents will be stored in the document library. Click the browse button (**...**) to specify an existing **Base folder**. If desired, you can then specify one or more **Dynamic folder levels** to be placed under the selected **Base folder**. To create dynamic folders, click **Add** and enter a folder name. The folder name can consist of text, one or more document properties, and functions.

- To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. Some example document properties are date/time, document name, data type, and so on.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions.

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You can add, edit, and remove folders, and change the folder order using the buttons next to the box. Each level added becomes a sub folder of the folder above it in the list. If the folders already exist, the document will be filed there, otherwise the folders will be created.

Send email notification upon filing

Specifies if an email notification will be sent when a document is sent to the library. To configure the email notification, select the check box and click **Email**. This opes the **Send Email** dialog box.

When filing documents in the library

Determines the file store for documents sent to the library. You can choose to leave them in their current file store or move them to a specified file store.

Purge documents after *X* days

Determines how long documents should stay in the library before it is deleted.

Document Owner Mapping tab

Use the **Document owner mapping** tab to control how the document owner is set. This tab is available for all of the extraction profiles. You can access this tab from the **Document Properties Profile** dialog box during source configuration.

Click an option you want to learn more about.

- *Job Ticket tab* on page 557
- *Document Property Mappings tab* on page 541

Name

Specifies the name of the profile.

Description

Specifies a description of the profile.

Set the document owner using the following method

Use the Windows user id (if available) Sets the document owner to the Windows user ID. This can be used with the following source types: Windows queue, network folder, and Web file upload.

Map to the following external field **Sets the document owner to a mapped external field.**

Note: For job ticket profiles, the ticket information fields are expressed as XPath statements. XPath statements show the structure of the ticket information. It allows the ability to specify a specific instance of a field if that particular information field occurs more than once in a documents metadata. If a particular external field is not listed in the list, the XPath statement can be directly entered. For headers from data profiles, this list will be populated with the headers specified.

You can map the external field's value using the following method.

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- **Use the external value as the OM user name** — Allows external document property information to be used for the Nuance Output Manager user name. Note, when the document is first received by the source the document has existing properties. These properties are called external document property values.
- **Use the following lookup profile** — This is not currently implemented. When implemented, you will be able to use a lookup table to map Personal Identification Numbers to user names.
- **Use the following value mappings** — Allows for entering values for the external document property. When the external document property has one of the values listed in the **External Field Value** column, the value in the **Property Value** column will be used.

If you are unable to determine the document owner, assign the following user

Assigns a document owner from the **User and Group Selection** dialog box. This user will be assigned in the document owner cannot be determined using the above settings.

Document Properties dialog box

Use this dialog box to configure document properties. You can access this dialog box when you view/edit the properties of a document in a Documents grid or create a business rule action to set document properties.

View

Important: This option is only available when you are viewing/editing the properties of a document in a Documents grid.

Controls the document properties/print preferences that display in the grid. You can change the view based on the capabilities of the printer family and the specific destination where the document is being routed.

All — Displays all available document properties in the grid.

Standard — Displays only the document properties that the destination is capable of using. This is the default view.

Only Set Values — Displays only the document properties that contain a value (have been configured). This is an easy way to see the settings that are going to be applied to the document.

Properties grid

Configure the document properties by clicking directly in the grid.

Document Property column – Lists the property values that can be configured. The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the print preferences/document properties that belong to that group. The first node level in the categories determine the print preferences for the properties it contains. On the print preference node, you select how the property should be applied when a document is sent to a destination. Under each print preference are the parameters needed to generate that print preference.

Mode column – Specifies how to apply the property value. Click in the cell and choose one of the following options:

- Always Apply — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.

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- Apply Conditionally — Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- Informational Only - Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

Value column — Specifies the document property value. Click directly in the cell to change the value. You can use functions to insert and extract data as necessary.

Only the allowed values configured in the **Configure Document Properties Utility** will be available for selection. If **(Excluded)** displays next to a value, that value was excluded by the currently assigned destination on the **Destination Capabilities** dialog box.

Document Properties Profile dialog box

Document properties profiles is a complex feature that allows the mapping of header data to Nuance Output Manager document properties. Only advanced users and professional service engineers should configure this. You can access this dialog box from the **Document properties** tab during source configuration.

Name

Specifies the document properties profile name.

Description

Specifies a description of the document properties profile.

Native header profile

Specifies the native header profile. This profile configures information received when the document arrives as part of the transmission protocol. This includes email fields, FTP transmission data, LPD control file fields, watch folder information, socket transmission data, WebSphere MQ transmission data, Windows queue print job data, and Output Manager Print Server header fields.

Use the list to select an existing profile.

New — Displays the **New Native Header Profile** dialog box for creating a new native header profile. You can configure the profile using the **Native headers** tab, **Document property mappings** tab, and **Document owner mapping** tab.

Edit — Displays the selected profile properties for modification.

Manage — Displays the **Manage Native Header Profiles** dialog box which lists all of the defined profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Job ticket profile

Specifies the job ticket profile. This profile configures information extracted from several types of job tickets, including Nuance Spool Header, Output Statement, or XML.

Use the list to select an existing profile.

New — Displays the **New Job Ticket Profile** dialog box for creating a new job ticket profile. You can configure the profile using the **Job ticket** tab, **Document property mappings** tab, and **Document owner mapping** tab.

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Edit — Displays the selected profile properties for modification.

Manage — Displays the **Manage Job Ticket Profiles** dialog box, which lists all of the defined profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Job parsing profile

Specifies the job parsing profile. This profile configures information extracted from Postscript, PDF, and PCL documents.

Use the list to select an existing profile.

New — Displays the **New Job Parsing Profile** dialog box for creating a new job parsing profile. You can configure the profile using the **Job parsing** tab, **Document property mappings** tab, and **Document owner mapping** tab.

Edit — Displays the selected profile properties for modification.

Manage — Displays the **Manage Job Parsing Profiles** dialog box, which lists all of the defined profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Headers from data profile

Specifies the headers from data profile. This profile controls information extracted from specified locations within the actual document data. Data can be extracted from documents in various formats including ASCII, ASCII with ASA, S/370, and VBM.

Use the list to select an existing profile.

New — Displays the **New Headers From Data Profile** dialog box for creating a new headers from data profile. You can configure the profile using the **Headers from data** tab, **Document property mappings** tab, and **Document owner mapping** tab.

Edit — Displays the selected profile properties for modification.

Manage — Displays the **Manage Headers From Data Profiles** dialog box, which lists all of the defined profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Property grid

Determines the order in which the configured profiles are used when a document is received, and what the default static value is if no data is found in the respective header. The mapping order can be different for each document property.

Property column — Displays the Nuance Output Manager document property name.

Mapping Order column — Controls the sequence the designated profiles are processed to find a value for that document property. Note the static value by default is the value for that document property in the source's **Document properties** tab.

Click in the cell to display a configuration menu. Configure the order in which headers are processed by selecting the appropriate rows and clicking the **Up** and **Down** buttons. To enter a default static value, click in the **Mapping/ Value** cell next to **Static Value** and either type or select the value. This static value is used if no data is found in the preceding headers.

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Document Property Mappings tab

Use the **Document property mappings** tab to configure document property mappings for all of the extraction profiles. You can access this tab from the **Document Properties Profile** dialog box during source configuration.

Click an option you want to learn more about.

- *Native Headers tab* on page 580
- *Document Owner Mapping tab* on page 537

Name

Specifies the name of the profile.

Description

Specifies a description of the profile.

Document property mappings grid

Configures document property mapping directly in the grid. To enable document property mapping, select the **Map Values** check box for the property and then click in the **External Field** column.

Property column — Displays the document property to be mapped.

External Field column — Selects the mapping from the list. If a look up table is needed to adjust the values, click the [+] in front of the property to create or revise a lookup table. Enter the values in the **Value Mappings** grid as necessary.

Note: For job ticket profiles, the ticket information fields are expressed as XPath statements. XPath statements show the structure of the ticket information. It allows the ability to specify a specific instance of a field if that particular information field occurs more than once in a documents metadata. If a particular external field is not listed in the list, the XPath statement can be directly entered. For headers from data profiles, this list will be populated with the headers specified.

Map Values column — Enables document property mapping.

Unmapped Value Action column — Specifies what happens when there is a missing look up table entry. You can choose to skip the property mapping entirely, assign the external value as-is, or assign the unmapped value default.

Unmapped Value Default column — Specifies a default value.

Edit LDAP User dialog box

Use this dialog box to modify the information about an LDAP user. You can access this dialog box when you are managing users, managing Nuance Output Manager security roles, and configuring security for the Output Manager Console, destinations, sources, and documents.

LDAP server

Specifies the LDAP server. You cannot modify this field.

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Distinguished name

Identifies the DN (distinguished name) of this LDAP user. You cannot modify this field.

User name

Specifies the user name that will be used when logging in to the server.

Display name

Specifies the LDAP display name.

Email address

Specifies the email address of the user.

Department

Specifies whether the user is a member of a department. You can select one of the departments from the list or click **New** to create a department from the **Department** dialog box.

Update from LDAP Server

Restores the user detail information to the values in the LDAP server if you chose to override the data for the Nuance Output Manager environment.

Edit Windows User dialog box

Use this dialog box assign a Windows user to a new or existing department. Only the **Department** field is editable. This dialog box is displayed when you click **Modify** from the **Users** tab in the **Manage Users** utility.

User name

Specifies the user name for the selected Windows user.

Display name

Specifies the display name for the selected Windows user.

Email address

Specifies the email address for this Windows user.

Department

Indicates the department for this Windows user. Use the list to select an existing profile. To create a new department, click **New**. This opens the **Department** dialog box.

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License Operation dialog box

Use this dialog box to determine if you want to install and activate a new license, activate an installed license, or deactivate DBM components.

Install and activate a new license

Installs and activates a new license file. You can install the license automatically via the Internet or manually by selecting the license file.

Activate license

Activates an installed license file. You can activate all DBM components or select which DBM components to activate. You can also choose the activation method: automatic activation via the Internet or manual activation using *Notable Solutions Web License (/weblicense.nsiautostore.com)*.

Deactivate DBM components/uninstall license

Deactivates DBM components.

Important: Before deactivating a license, you must stop all Nuance Output Manager work. Currently, deactivating a license will halt the Nuance Output Manager functionality on all systems.

Error Handling Profile dialog box

Error handling profiles specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. Use this dialog box to configure error handling profiles.

You can access this dialog box when you configure a destination.

Name

Specifies the error handling profile name.

Description

Specifies a description of the error handling profile.

Check box options

- **Use two-stage error handling** — This feature will be implemented in a future release.
- **Use detailed system errors** — Enables more granular control of system error handling.
- **Use detailed SNMP errors** — Enables error handling control for specific SNMP conditions. Once the option is selected, click the **Select errors** button to select the SNMP conditions you want to process. The selected conditions will be listed in the grid where error handling is configured.
- **Time between retries** — Sets the time between transmission retries.
- **Attempt error recovery after** — Sets the time to wait before attempting error recovery.

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Grid options

Click directly in the grid to configure error handling for the listed errors.

- **Error reported** column — Displays the error type or SNMP condition type (or message) for which to configure error handling. More granular options can be made available by selecting the **Use detailed system errors** and **Use detailed SNMP errors** check boxes.
- **Interval before assigning state** column — Sets the number of retries (system errors) or time interval (SNMP conditions) to wait before assigning the destination state.
- **Interval type** column — Sets the type of interval for retries.
- **State to assign** column — Sets the state to which the destination should be assigned when all retries have failed.
- **Ignore** — Ignores the error and leaves the destination in a Ready state.
- **Error** — Sets the destination to Error state. Error recovery will be attempted based on the time interval set in the **Attempt error recovery after** field.
- **Down** — Sets the destination to a Down state. The destination must be manually moved out of this state.
- **Failover documents** column — Initiates the failover process for documents that have encountered error conditions when transmitted to the destination.

Exception Fields dialog box

Use this dialog box to select the exception fields for an ad hoc merge package rule.

Exceptions fields are applicable only if the documents that you are merging have job tickets specifying a baseline for how each page should print or have rules or input configuration overrides that set specific document properties (print preferences) AND you want to preserve some of these attributes on a per-page basis in the resultant merged document.

Use this dialog box to specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides). For instance, you have multiple documents you want to merge that each have document property values specified for media type, media color, and duplex. All three of these are important in the final merged document, such that it will specify a baseline that is most common for media type, media color, and duplex, and will contain exceptions for each sequence of pages that does not conform to the baseline.

If you do not select these document properties as exceptions, they will not be considered in the merge, and no exceptions will be generated for any differing value of document properties not specified. For example, if you did not select any exceptions document properties, then the merged document will contain a baseline without any exceptions based solely on the model document. (The model document is determined when you choose if you want to use the first or last document properties in the **Merge Package** dialog box.) Assuming the model document was the first document, is a cover page, and is single-sided and green, the merged document will thus print with all pages single-sided and green. By specifying duplex and media color as exception fields, the merged document will instead specify each page accordingly as to whether it should print single-sided or double-sided, and on green or white paper.

Let's say you want media type and media color to be preserved from the constituent documents into the merged document, but you want the whole job to print single-sided regardless of whether a constituent document specifies itself to be double-sided or not. In this case, you would only select media type and media color as exception fields and you would not select duplex. You would also have to insure that your model document is single sided, or add a Set Document Properties action to your rule to set this property on the merged document.

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Properties grid

Lists the document properties that can be selected as exception fields. Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).

The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Export Reports dialog box

Use this dialog box to export reports that you generate from base reports in the Reports application. Nuance Output Manager does not allow you to export base reports. When you export a summary report, Nuance Output Manager allows you to export a linked detail report.

Export Folder

Specifies the folder where Nuance Output Manager exports the report files.

Grid

The grid shows report details for all the reports to be exported. The grid shows the following details:

- **Report Id** — System-generated identification number for the report.
- **Name** — Name of the report to be exported.
- **Report Type** — Type of report to be exported.
- **Linked to Report Id** — System-generated identification number for the detail report to which a summary report is linked.
- **Last Update** — Indicates the date and time the report to be exported was last updated.

Failover Profile dialog box

Failover profiles specify what should happen to documents if errors occur when they are sent to a destination that is configured to allow document failover. Use this dialog box to configure failover profiles.

You can access this dialog box when you configure a source or destination, create a business rule with a failover profile, or assign a failover profile from the Documents grid.

Name

Specifies the failover profile name.

Description

Specifies a description of the failover profile.

If all retries fail...

Specifies what will happen when an error occurs and the failover process has been initiated. You can choose to perform one of the following actions.

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- Place the document in an error state.
- Reroute the document to the failing destinations default failover group. This is specified on the **Error handling** tab.
- Reroute the document to the destination of your choice.

Number of failover destinations to try — Specifies the number of destinations to try before placing the document in an error state. You can try an **Unlimited** number or specify **Up to** a specific number of times.

File Store dialog box

Use this dialog box to configure Nuance Output Manager file stores. Nuance Output Manager only stores the properties of a document. The actual files are stored in network folders, called file stores.

Enter the file store path

Specifies the network folder path where the Nuance Output Manager files are stored. You can type the path or click the browse button (**...**) to select a folder. The NSi DBM Service will need to have permissions assigned to access the selected network folder.

Verify the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted with the Nuance Output Manager cleanup process runs.

Filter Profiles tab

Use this tab to define and select configurations for each format. You can access this tab when you create or modify a transform package on the **Configure Transform** dialog box.

Click an option you want to learn more about.

- *General tab (Transform Package)* on page 548
- *Resources tab* on page 617
- *Fonts tab* on page 547

Format grid

Use the grid to select or create a filter profile for each format.

- **Format column** — Displays all available formats. The formats that display vary depending on the transform package selected on the **General** tab.
- **Configuration column** — Specifies the configuration to be used with each format. Click in the column to select a configuration from the drop-down list. The default profile is selected by default for all formats. All previously created configurations will be listed in the drop-down list.
- **Modify/New column** — Modifies the selected configuration or creates a new configuration from the **Configure Filter Profile** dialog box. Because the default configurations cannot be modified, if you click the browse button (**...**) for a default configuration, a new configuration will be created when you save.

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Font Face Configuration dialog box

Use this dialog box to configure the font face.

You can access this dialog when you are configuring a transform package from the **Fonts** tab.

General

- **Style** — Specifies the font style, upright or italic.
- **Weight** — Specifies how thick or thin characters in text should be displayed.
- **Width** — Specifies if the characters in text should be condensed or expanded.

Dev

- **Override Embedded Font** — Specifies whether an embedded font resource should be replaced with the font to which the input font is mapped.
- **No Hinting** — Specifies if you want to use font hinting (screen optimized fonts). Font hinting is the process by which fonts are adjusted for maximum readability on computer monitors.
- **Dev Name** —

Font File

- **Fixed Symbol Set** — Determines if you wan to use a specific collection of symbols provided by a font.
- **Name** — Specifies the font name.
- **Type** — Specifies if the font is TrueType or Type 1.
- **Size** — Specifies the font size.
- **Id** —
- **Pitch** — Specifies the number of characters per inch (for fixed-spaced fonts only) common values are 10, 12, 16.67. Used to calculate height for fixed-spaced scalable fonts.Embed — Specifies how to embed the font. You can choose to always embed, embed on input, or embed on output.

AFTP

This section is only available for AFP.

- **Baseline Increment** — .
- **Rasterize** — .
- **Raster** — .

Fonts tab

Use this tab to control the font mapping of input fonts to output fonts. The defaults are typically correct, but may need to be adjusted for special cases. You can add or modify fonts directly in the grid. You can access this tab when you create or modify a transform package on the **Configure Transform** dialog box.

Click an option you want to learn more about.

- *General tab (Transform Package)* on page 548
- *Filter Profiles tab* on page 546
- *Resources tab* on page 617

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Fonts grid

Displays the fonts for each data type. The defaults are typically correct and do not need to be modified. If necessary, you can add fonts by clicking on the top row of the grid or modify the listed fonts by clicking directly in the grid.

Used by — Specifies the data type.

Family column — Specifies the font family.

Serif Style column — Specifies the serif style, either serif or sans serif. Serif fonts have small lines at the ends on some characters. Sans serif fonts do not have the lines at the ends of characters.

Spacing column — Specifies the spacing, either proportional or monospaced. A proportional typeface contains characters of varying widths, while a monospaced (fixed-width) typeface uses a single standard width for all characters.

Ref Type column — Specifies a reference type of TrueType or Type1.

Type Face column — Specifies the number that corresponds to the typeface for the font family (for example, Arial is 16602 and Courier is 4099).

Font Face column — Specifies the font face details. Click the browse button (**...**) to open the **Font Face Configuration** dialog box.

General tab (Transform Package)

Use this tab to specify the transform package you want to use. You can access this tab when you create or modify a transform package on the **Configure Transform** dialog box.

Notice: IPDS mentioned in here is not available for new sales.

Click an option you want to learn more about.

- *Filter Profiles tab* on page 546
- *Resources tab* on page 617
- *Fonts tab* on page 547

Server

Displays the transform server name.

Name

Specifies the transform package name.

Type

Specifies the type of transform package that Nuance Output Manager uses to convert print stream data or the IPDS transform package that Nuance Output Manager uses to send print data to IPDS printers. The Nuance Output Manager transform package allows you to convert to and from PCL, Postscript, PDF, Text, and common image formats. The IPDS transform package is available only when configuring an IPDS destination. IPDS destinations are licensed on a per-printer basis and are not available for new sales.

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EXE path

Specifies the EXE path. For the Nuance Output Manager and IPDS transform types the executable path is automatically selected, @EOMTransformDir. For a third-party transform package, enter the path to the appropriate transform package directory.

Nuance Output Manager Transform package configurations can be reused on different servers. The installation of third-party transform packages, Ghostscript, and Adobe Acrobat readers should be in the same locations on all servers if possible.

You cannot point a third-party transform package to an Nuance Output Manager transform executable because licensing is different for each type. The Nuance Output Manager license is part of Nuance Output Manager. Third-party transform package licenses may need to be installed separately.

Logging state

Specifies if all transform logs and temp files will be saved in the document folder. By default, the **Logging State** is set to Yes. This will save all transform logs and temp files in the document folder. These log files should be inspected during installation and preproduction testing to insure that fonts are correctly mapped. In a production system, the **Logging State** can be set to No to save disk space. If the transform operation returns an error (return code not zero), the log and temp files will not be deleted, and are available for troubleshooting.

Global Group Routing Map dialog box

Use this dialog box to define the document properties that you can use as group routing criteria for this instance of Nuance Output Manager. Routing documents to a destination group operates in one of two basic modes. If you use round robin routing, you can assign documents to destinations by matching document properties with values assigned to destinations in the group. After you define global properties in this dialog box, you configure individual destination groups to use one or more of the properties in their own routing configuration.

You can access this dialog box through **Set General Preferences** on the **Destinations** tab in the **Administration** application.

Available properties

Select the document properties that a destination group can use in its routing configuration.

Routing map

Use the **Move up** and **Move down** buttons to set the order in which the properties appear when configuring group routing.

Group Routing Configuration dialog box

Use this dialog box to configure how Nuance Output Manager routes documents to a destination within a destination group. You can access the dialog box by right-clicking a destination group in the **Destinations** application.

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Do not assign a destination

The default setting that Nuance Output Manager uses to assign documents to a pending queue within the group. Documents remain in the queue until a user manually assigns the documents to a destination or releases them from an Nuance Output Manager release station.

Round robin among available destinations

Nuance Output Manager routes documents to the next available destination in the destination group.

Require matching document and destination properties

When you select **Round robin among available destinations**, you can select this option to assign a document to a destination in the group only if one or more document properties match corresponding routing column properties for the destination.

Groups tab

Use this tab to add, remove, and manage groups of users. You can access this tab from the **Manage Users** utility.

Click an option you want to learn more about.

- *Users tab* on page 698
- *Departments tab* on page 492

Include removed groups

Displays groups that were previously removed by an administrator.

Groups grid

From this grid, you can add and manage groups.

Full Name — Specifies the name of the group of users.

Type — Indicates whether this group is an Nuance Output Manager group, an LDAP group, or a Windows group.

Email — Specifies the email address for this group.

More Groups button

If the group is not listed, click **More Groups** to add that group. Once groups are added, they are placed in the Nuance Output Manager database and will always be listed in the future. Choose one of the following options from the list:

- **Add OM Group** — Opens the **OM Group** dialog box for adding Nuance Output Manager users.
- **Add LDAP Group** — Opens the **LDAP Group** dialog box for adding LDAP users.
- **Add Windows Users and Groups** — Opens the **Users and Groups** dialog box for adding Windows users and groups.
- **Import LDAP Users and Groups** — Opens the **LDAP Import Utility** for importing LDAP users.

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Modify button

Depending on the type of group selected, opens the **OM Group** dialog box or the **LDAP Group** dialog box so that you can change information. You cannot modify a Windows group from the Output Manager Console; you must modify it from the Windows operating system.

Remove button

Deletes the selected group.

Headers from Data tab

Use the **Headers From Data** tab to configure headers from data profiles. Headers from data profiles consist of information that Nuance Output Manager can extract from specified location within the actual document data. Nuance Output Manager can extract data from documents in various formats including ASCII, ASCII with ASA, S/370, and VBM.

Only advanced users and professional service engineers should configure these profiles. You can access this dialog box from the **Document Properties Profile** dialog box during source configuration.

Click an option you want to learn more about.

- *Document Property Mappings tab* on page 541
- *Document Owner Mapping tab* on page 537

Name

Specifies the name of the headers from data profile.

Description

Specifies a description of the headers from data profile.

Data format

Specifies the document data format. You can choose ASCII, ASCII with ASA, S/370, or VBM.

Code page

Specifies the code page for the document.

Extraction method

Line-based — Searches for the header based on a particular line.

Record-based — Searches for the header based on a particular record, regardless of page breaks.

Headers to extract

Specifies the headers to extract. These variables will appear on the **Document property mappings** tab and the **Document owner mapping** tab. Click directly in the grid to edit.

Name column — Specifies the header field for the data to be placed in.

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Page column — Specifies the page where data extraction will begin.

Line column — Specifies the line number in the file that contains the data.

Column column — Specifies the column where data extraction will begin. For ASCII with ASA carriage control files, the first column is not counted (in other words, the second column is treated as the first column).

Length column — Specifies how many characters to extract.

Import Reports dialog box

Use this dialog box to import reports into folders in the Reports application.

Import Folder

The folder that contains the report files to be imported.

Import into original group

Imports the report files into the same base reports folder from where the report files were exported. If the report files were exported from a custom folder that another Nuance Output Manager user created, select the folder from **Import into group**.

Import into group

Specifies the custom reports folder where Nuance Output Manager imports the report files.

Select all

Selects all the report files in the grid.

Unselect all

Clears report files selected in the grid.

Grid

The grid shows all the report files in the folder that you selected for **Import Folder**. The grid shows the following details:

- **Name** — Name of the report to be imported.
- **Report Type** — Type of report to be imported.
- **Original Id** — System-generated identification number for the report at the time of export.
- **Linked to Report Id** — System-generated original identification number for the detail report to which a summary report is linked.
- **Time Exported** — Indicates the date and time the report file was exported.

Ini Resource dialog box

Use this dialog box to configure an Ini resource. You can access this dialog box when you configure an Ini resource in the **Resource Manager** dialog box or an Adept transform action in the **Process Designer**.

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Name

Specifies the name of the Ini resource.

Description

Provides a description of the Ini resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must contain text data.

Code page — Specifies the code page to be applied to the resource data.

Resource Editor

You can enter text, document properties, and functions in the Resource Editor.

To insert document properties, right-click in the box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Export button

Allows for exporting the resource data. Unlike the **Export** button on the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** box to a text file.

Input Options tab

When using a custom input configuration, a large number of options are available to control the transform operation. Input options control which items appear in the output file and how images are processed. Typically these options should be left at the default settings.

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You can access this dialog box when you configure a transform action for business rules or output processes or when configuring an IPDS destination.

Notice: Please note that the IPDS output option is not available for new sales.

Click an option you want to learn more about.

- *Output Options tab* on page 590
- *Page Layout tab* on page 595
- *PDF Output tab* on page 596

General input options

- Convert to image — Converts and stores the page contents as an image on input.
- Invert duplex — Inverts duplex information (back to front and front to back).
- Copy comments — Copies the comments stored in the input file.

Note: There is no guarantee that all of the comments specified in the input file can be copied to the output file. For example, TIFF files accept only one comment.

- Obfuscate text — Changes the text to be unreadable when reading the page (input). This is helpful if you are dealing with sensitive customer documents. Obfuscate text does not work for documents where the text is stored in a custom encoding or as part of an image.
- Enable full printable area for PCL input — Specifies that logical page matches physical page (page margins are not ignored).
- Convert and append attachments (PDF 1.6) — Only available when using PDF input file.

Remove

Specifies the items in the input file you want removed. The items will not appear in the output file.

Dithering method

Specifies the dithering method that will be used.

- Default — The software attempts to determine the best dithering method to use.
- Clustered order — Clustered order dithering with specification of matrix size. Values are 2 to 8, with a default value of 3.
- Dispersed order — Dispersed order dithering with specification of matrix size. Values are 2 to 8, with a default value of 4.
- Floyd-Steinberg — Dithering with error diffusion algorithm Floyd-Steinberg, It examines a small neighborhood of four pixels surrounding the central pixel, and distributes the error in a defined structure.
- Jarvis-Judice-Ninke — Dithering with error diffusion algorithm Jarvis-Judice-Ninke. It uses substantially larger neighborhoods that contain a greater number of pixels in order to spread the error distribution.
- Stucki — Dithering with error diffusion algorithm Stucki. It uses substantially larger neighborhoods that contain a greater number of pixels in order to spread the error distribution.
- Monochrome threshold — Monochrome conversion with specification of threshold percent value (0 — 100). The default value is 50.

Image depth

Specifies the image color depth in bits of the input file. You can select one of the following:

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- 1: Monochrome
- 8: Grayscale, Palette
- 24: RGB
- 32: CMYK

Image type

Specifies the image type of the input file, RGB, CMYK, Grayscale, or Palette.

Password

Specifies the password for password protected input files.

To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Render on conversion to image

Specifies the items you want to be rendered on conversion to image.

Advanced additional options

- **Additional global commands** — Specifies parameters that you want to pass to profiles. Typically would be used to pass JSL/JDE values to a LCDS profile, or PAGEDEF and FORMDEF values to a MMD profile.
- **Additional input commands** — Specifies additional parameters for handling the input file. Input commands can consist of text and one or more document properties. Contact Nuance Support for more information on advanced transform configuration.

To	Do this
Insert document properties in these fields	Right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The do cument properties will display enclosed in brackets ([]).
Insert functions in these fields	Right-click in the box, click **Insert Function**, and choos e the appropriate function.

Filter profile

Specifies a filter profile to override the profile configured in the transform package for this input/output combination.

The filter profile can consist of text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Job Parsing tab

Use the **Job Parsing** tab to configure job parsing profiles. This profile configures information extracted from Postscript, PDF, and PCL documents. The job parsing method of extracting meta-data relies on printer-specific data

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streams that can include Postscript and PCL, but can also contain ticketing information or job level commands that are not part of the print data itself. The distinction is that the format of this information within the print stream is already defined, by the manufacturer or some standards body, and Nuance Output Manager has a profile that defines how the information is mapped to the Nuance Output Manager print properties.

You can access this dialog box from the **Document Properties Profile** dialog box during source configuration.

Click an option you want to learn more about.

- *Document Property Mappings tab* on page 541
- *Document Owner Mapping tab* on page 537

Name

Specifies the name of the job parsing profile.

Description

Specifies a description of the job parsing profile.

Originating printer family

Specifies the printer family template to use as the parsing guide. Select the printer family from the drop-down list.

Search for printer instructions/job ticket in the following location

Use the following options to specify the location of the ticket. The available options vary depending on the printer family selected.

Embedded in the document

Searches for the printer instructions/job ticket embedded in a document.

- **Remove from document** — Removes the job ticket data from the document.
- **Keep prior data** — When using job tickets, all lines up to and including the job ticket are deleted from the file. Select this option to keep all data before the job ticket. The job ticket information will be removed.

In a separate file

Searches for the printer instructions/job ticket in a separate file. You can choose a folder to search and then match the job ticket file name using a specified document property, and/or match the job ticket extension using a specified extension.

- **Delete job ticket file after processing document** — Deletes the job ticket file after processing.

If the job ticket is not found, take the following action

Specifies how to process the document if the job ticket is not found. You can choose to process the document normally, receive the document and place it in error state, or reject the document.

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Job Ticket tab

Use the **Job Ticket** tab to configure job ticket profiles. Job tickets contain information about the document, and/or how the document should be treated. Tickets are logically separate from the document, and in some cases are inserted in front of the document file. Tickets can be processed in several formats, including NSi Spool Header, Output Statement, and XML.

Only advanced users and professional service engineers should configure these profiles. You can access this dialog box from the **Document Properties Profile** dialog box during source configuration.

Click an option you want to learn more about.

- *Document Property Mappings tab* on page 541
- *Document Owner Mapping tab* on page 537

Name

Specifies the name of the job ticket profile.

Description

Specifies a description of the job ticket profile.

Type

Specifies the type of job ticket. You can select one of the following types: XML Job Ticket, NSi Spool Header, or Output Statement.

- **Map job ticket** button — Establishes the job mapping for XML Job Tickets. Click **Map job ticket** to open the **Open** dialog box, in which you can select one or more sample tickets to create the ticket mappings.

  This option is not available for NSi Spool Header and Output Statement tickets, as they have fixed mappings.
- **Clear mappings** button — Removes any associated job mapping.

Search for job ticket in the following location

Once one or more sample tickets have been mapped, use the following options to specify the location of the ticket. The available options vary depending on the type of job ticket selected.

Embedded in the document

Searches for the job ticket embedded in a document. You can search based on the start and/or end of the job ticket recognition string.

- **Remove from document** — Removes the job ticket data from the document.
- **Keep prior data** — When using job tickets, all lines up to and including the job ticket are deleted from the file. Select this option to keep all data before the job ticket. The job ticket information will be removed.

In a separate file

Searches for the job ticket in a separate file. You can choose a folder to search and then match the job ticket file name using a specified document property, and/or match the job ticket extension using a specified extension.

- **Delete job ticket file after processing document** — Deletes the job ticket file after processing.

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If the job ticket is not found, take the following action

Specifies how to process the document if the job ticket is not found. You can choose to process the document normally, receive the document and place it in error state, or reject the document.

LDAP Group dialog box

Use this dialog box when you are adding LDAP groups to Nuance Output Manager for assigning quotas. You access this dialog box when you are managing groups with the **Manage Users** utility **Groups** tab.

LDAP server

Specifies the LDAP server. Click **New** to define an LDAP server using the **LDAP Server** dialog box. Click **Modify** to make changes to the selected server.

LDAP group DN

Identifies the DN (distinguished name) of this LDAP user. You select this user in the **Browse LDAP Server** dialog box, which is opened when you click the **Browse** button.

LDAP Group Detail

Displays the information contained in the LDAP directory. The information can be overridden for the Nuance Output Manager environment. To change the group name, display name, or email address, select **Override LDAP data**. The fields will then be made available for entry.

- **Group name** — Specifies the LDAP group name
- **Display name** — Specifies the LDAP display name. This name is displayed on the **Manage Users Utility Groups** tab.
- **Email address** — Specifies the email address of the group.
- **Override LDAP data** — Specifies that you want to override the LDAP group details. When you select this check box, the data is changed only in Nuance Output Manager, not in the network LDAP directory.

LDAP Server dialog box

When you are adding LDAP users or an LDAP group to Nuance Output Manager, you must specify the LDAP server that you will search. Use this dialog box to specify the LDAP server that contains the users or the group that you want to add. Once the users or group are added, permissions and quotas can be assigned as needed. You can access this dialog box from the **LDAP User** dialog box or from the **LDAP Group** dialog box.

Server type

Specifies a server type of either Microsoft Active Directory Server or Generic LDAP Server. A server type of Generic LDAP Server operates in a Microsoft Active directory environment. However, if you are connecting to an Active Directory Server (ADS), selecting Microsoft Active Directory Server utilizes the Active Directory security and relationships.

Server description

Indicates the name by which you want to identify this server.

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Server address

Specifies the DNS (Domain Name System) name of the server. In most cases, you can simply specify the server address in domain name format, for example, nuanceautostore.com/.

Port

Identifies the standard IP port for the LDAP server.

Login ID (DN format)

Specifies the DN (distinguished name) of a user with administrative rights.

Password

Contains this user's password.

Verify Connection button

Confirms that a connection can be established with the information you have entered. You will see either **Success** or **Failure** to the right of the button.

LDAP User dialog box

Use this dialog box to add LDAP users to Nuance Output Manager so that you can assign permissions and quotas. You can access this dialog box when you are managing users, managing Nuance Output Manager security roles, and configuring security for the Output Manager Console, destinations, sources, and documents.

LDAP server

Specifies the LDAP server. Click **New** to define an LDAP server using the **LDAP Server** dialog box. Click **Modify** to make changes to the selected server.

LDAP user DN

Identifies the DN (distinguished name) of this LDAP user. You select this user from the **Browse LDAP Server** dialog box, which is displayed when you click the **Browse** button.

LDAP User Detail

Displays the information contained in the LDAP directory. The information can be overridden for the Nuance Output Manager environment. To change the user name, display name, or email address, or to select an existing department, select **Override LDAP data**. The fields will then be made available for entry. If you only want to define a new department, you do not need to activate the override function.

- **User name** — Specifies the user name that will be used when logging in to the server.
- **Display name** — Specifies the LDAP display name.
- **Email address** — Specifies the email address of the user.
- **Department** — Specifies whether the user is a member of a department. You can select one of the departments in the list, or click **New** to create a department from the **Department** dialog box. You can create a new department without selecting **Override LDAP data**.

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- **Override LDAP data** — Specifies that you want to override the LDAP user details. When you select this check box, the data is changed only in Nuance Output Manager, not in the network LDAP directory.

Learning About the Audit Console

Use the Audit Console to view detailed information about actions performed by users. You can choose to save or discard audit information using the **Set General Preferences Utility**.

You can access this utility by selecting **Tools Audit Console** on the Output Manager Console menu bar.

Audit Grid

You can customize the audit grid view by sorting, filtering, and grouping by columns. These actions are useful when trying to quickly find records in the Audit Console. You can also add and remove columns and change the order in which the columns display. The records are sorted by the date and time they are received. The most recent records appear at the top of the window.

AuditId — A sequence number corresponding to the specific action occurrence.

AuditTime — The date and time the activity occurred.

AuditAction — The user's action.

UserLoggedOn — The date and time the user logged on.

UserLoggedOff — The date and time the user logged off.

ApplicationDisplayName — The name of the program that was being used.

UserName — The user name that performed the action. Actions that display without names were performed by Nuance Output Manager services.

ObjectValue1 through **ObjectValue4** — Action-specific information. For example, when adding a source, the source name is displayed.

Filter options

The audit grid can contain many rows. To make the grid more useful and responsive, you can filter the audit records that display. By default the audit grid displays audit actions that occurred in the last hour. The time period can be increased up to a year.

You can also filter the grid using a custom query. Custom queries filter the grid based on the audit grid columns.

Status bar

Search — Searches the grid columns. To search, type the text you want to find in the search box, click the column in the grid you want to search, and then press Enter or click the Search button. If the text is found, your focus will be moved to the first occurrence. New buttons will appear near the Search box that allow you to stop searching, move to the previous occurrence, and move to the next occurrence.

Print button — Prints the contents of the console window.

Query button — Displays the query tool for creating a custom query.

Help button — Displays help for the Audit Console. The Help window incorporates contents, index, search, favorites, and glossary tabs to make it easy for you to find answers to your questions.

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Refresh Query button — Updates the Audit Console data.

Cancel Query Mode button — Cancels the current custom query.

Paging buttons — Allows for paging through the grid. Click the double left arrow button (<<) to go to the first page, the left arrow button (<) to go to the previous page, the right arrow button (>) to go to the next page, and the double right arrow button (>>) to go to the last page.

Records — Displays the number of records in the console window.

Library Settings tab

Use the **Library settings** tab to configure the Document Library destination. The Document Library destination was created by default during installation, but you must select the library profile before it can be used. Once configured, documents routed to this destination will be placed in the Nuance Output Manager Library application. You can use the Library for long-term storage or to organize and present documents. You can access this tab when you configure the library destination.

Click an option you want to learn more about.

- *More settings tab (Destination Configuration)* on page 506
- *Error Handling tab (Destination Configuration)* on page 499

Name

Specifies the name of the Library destination.

Server

Not available.

Comments

Lists any general comments about the destination.

Location

Specifies any specific location information for the destination.

Image

Displays a Library destination image. To change the destination image, click **Select Image** and choose the appropriate image file (BMP, JPEG, or PNG). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the destination tree. To change the image back to the default, click **Reset Image**.

Library profile

To be accepted into the Nuance Output Manager library, a document must be assigned a library profile. This profile contains all of the settings needed to properly “file” the document. Documents sent to the library destination will be assigned the selected profile. If a document was sent using a business rule with a library profile assigned, the business rule library profile would be used.

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Select the appropriate library profile from the list. You can also click the **Browse** button to display the **Manage Document Library Profiles** dialog box. From this dialog box, you can create, modify, and remove library profiles.

License Confirmation dialog box

Use this dialog box to review the Nuance Output Manager license information before installing.

Issued to

Displays the customer information for the installed Nuance Output Manager license.

Serial

Displays the serial number for the installed Nuance Output Manager license.

Order

Displays the order number for the installed Nuance Output Manager license.

License File Installation dialog box

Use this dialog box to install the Nuance Output Manager license. There are two methods:

- You can install the license using an Internet connection by entering the license key for this Nuance Output Manager system.
- You can manually install the license using the license file.

Install License Automatically

To install the license automatically, you must have an active internet connection.

License key — Specifies the license key for your Nuance Output Manager system. During Nuance Output Manager order processing an Nuance Output Manager license was created that matches the options ordered. The license key was sent in an email to the ordering customer. If you cannot locate your license key, contact Nuance Communications, Inc. Technical Support or Sales for assistance.

Install License Manually

License file — Specifies the name of your license file. Either type the path and file name or use the browse button (**...**) to locate it.

Mail Server Search dialog box

Use this dialog box to locate a valid email server.

Domain

Specifies the domain you want to search for mail exchange servers. After entering the domain, click **Locate to search the domain.**

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Mail exchange servers

Displays all exchange servers located on the specified domain.

Manage Billing Accounts Utility

Use **Manage Billing Accounts** to in the **Administration** application create lists of billing accounts. A billing list can keep either descending or ascending balances. In the list properties you can also define whether a list keeps balances for accounts and whether the balances are ascending or descending.

To open **Manage Billing Accounts**, either click **Manage Billing Accounts** in the **Administration** application, or click **Tools** > **Administration** > **Manage Billing Accounts**.

Billing lists

In the **Select primary billing list to display** box, you can create billing lists and edit billing properties for any existing list.

Option	Description
Name	Click a list to edit properties or accounts. Accounts are displayed for the currently selected list.
Description	You can briefly describe the purpose of a billing list in this box.
New	Click to create a billing list. Clicking this button opens the **Billing List** dialog box.
Edit	Click to edit properties for a billing list. Clicking this button opens the **Billing List** dialog box.
Remove	Click to remove the currently displayed billing list. This deletes the list and its accounts.
Import	Click to import account information from a comma separated values (CSV) file.

Accounts

The accounts table shows accounts that are defined in a billing list.

Column	Description
Account Name	Specifies the name for an account. Click in this column to edit the name for an account.
PIN Code	Allows you to associate a pin code with an account. Click this box to define a pin code for an account or to remove a pin code from an account.
Current balance	Shows the current balance for an account with an ascending balance. You can click to change this value. This col

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Column	Description
	umn only shows for an account with an ascending balan ce.
Remaining balance	Shows the current balance for an account with a declinin g balance. You can click to change this value. This colu mn only shows for an account with a declining balance.
Next refresh	Show the date for the next refresh of the balance value. T his column shows for any account with an ascending or d eclining balance.
Initial balance	Shows the balance at the beginning of an account refresh period. You can click to change this period. The initial se tting is the same as the default balance upon refresh valu e for a billing list. This column only shows for an accoun t with a declining balance.
Max allowed balance	Shows the maximum allowed balance for an account wit h an ascending balance. You can click to change value p eriod. The initial setting is the same as the default maxim um allowed value for a billing list with ascending balanc es. This column only shows for an account with an ascen ding balance.
Refresh period	Shows the refresh period for an account. You can click t o change this setting. The initial refresh period is the def ault refresh period for a billing list. This column shows f or any account with an ascending or declining balance.

The following commands are available by clicking buttons at the bottom of this form.

Option	Description
Add secondary accounts	Click an existing account and then click this button to ad d secondary accounts under the selected account. After y ou add the secondary account, enter the **Account Name** and **Pin Code** just as you would for a primary account.
Remove selected accounts	Click and existing account and then click this button rem ove the account. For a primary account, this also remove s any secondary accounts that have been added under it.

Billing List dialog box

Use this dialog box to configure the billing list options.

You can access this dialog box when you create a billing list from **Administration - Manage Billing Accounts**.

Billing list name

Specifies the billing list name.

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Description

Provides a description of the billing list.

Balance option

Specifies if accounts have a declining balance, an ascending balance, or if a balance is not kept for this billing list. You can specify an ascending balance for postpaid accounts or a declining balance for prepaid accounts.

Balance refresh period

Specifies the default balance refresh period. Click the drop-down list button to specify properties for a refresh period. You can specify that a balance is refreshed after a certain number of days or on a particular day of each week or month. You can also specify a time for the refresh. When you are finished, click **Apply**.

You can configure the refresh period separately for any account in a billing list.

Balance upon refresh

Specifies the default balance amount upon refresh when defining a list that keeps accounts with a declining balance. You can change this value for any account in a billing list.

Maximum allowed balance

Specifies the default maximum balance amount upon refresh when defining accounts with an ascending balance. You can change this value for any account in a billing list.

Manage CsvDocProp Resources dialog box

This dialog box is used to manage CsvDocProp resources.

Resource grid

Lists all of the defined CsvDocProp resources.

Buttons

New button — Creates a new CsvDocProp resource. Opens the **CsvDocProp Resource** dialog box.

Edit button — Opens the selected CsvDocProp resource for modification. Opens the **CsvDocProp Resource** dialog box.

Delete button — Deletes the selected CsvDocProp resource.

Import button — Allows for importing CsvDocProp resources.

Export button — Allows for exporting CsvDocProp resources.

Manage License Utility

Use this utility to install and manage the licenses for the Nuance Output Manager software. You do not manually enter data in this window; the data is displayed by the utility.

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Before the software has been activated, all fields on the **Manage License** window are blank. After the license is installed, all fields are populated. The license status below the grid shows if the license is activated or not. The Nuance Output Manager components contained in the license are listed in the grid.

License key

Once the software has been activated, the license key for this Nuance Output Manager system displays.

License Wizard button

Displays the Nuance Output Manager License Wizard for activating or deactivating the Nuance Output Manager license.

The following methods are available for installing and activating a license:

- **Internet activation** — The Internet method requires a computer with an Output Manager Console connected to the Internet and the Output Manager Console communicating with the Nuance Output Manager DBM Service. Both the installation and the activation occurs quickly and does not require a license file. This is the recommended way to install and activate the Nuance Output Manager license.
- **Manual activation** — The manual method requires a license file accessible from an Output Manager Console system.

The license can be upgraded. The upgraded license will install over the existing license using the same serial number and different invoice number. This will automatically deactivate the old license.

Important: Before deactivating a license, you must stop all Nuance Output Manager work. Currently, deactivating a license will halt the Nuance Output Manager functionality on all systems.

Serial number

Specifies the serial number for your Nuance Output Manager system.

License Status

Indicates if the license is activated and displays the version number.

Customer

Displays the name and address of your company.

License grid

Description — Describes the product component.

Quantity — Indicates the number of licenses for a specific component.

Expires — Specifies the date that the license for a specific component ends. Dates are entered in the format *yyyymmdd*.

Licensed Behavior — Determines the behavior of licensed Nuance Output Manager components. For each component you can determine if the feature will be Hidden, Enabled, or Disabled.

Unlicensed Behavior — Determines the behavior of unlicensed Nuance Output Manager components. For each component you can determine if the feature will be Hidden, Enabled, or Disabled.

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Refresh button

Updates the grid with any changes.

Manage Product Components Utility

Use the **Manage Product Components** administration application to view the Nuance Output Manager components that are or have been installed and connected to this Nuance Output Manager database.

Grid

Displays all of the installed Nuance Output Manager components and their status, component type, and server.

Component column — Lists all supported components.

Status column — Indicates whether the component is active or stopped.

Component Type column — Specifies a component type of **Client** or **Service**.

Server column — Names the server on which the component is installed.

Domain column — Names the domain on which the component is installed.

Credentials column — Specifies the Microsoft Windows logon account for the component.

Monitored column — Indicates whether the component status is accounted for in the status light representing that service type. The service status lights display to the right of the menu bar in the Output Manager Console. Move the pointer over the lights to identify the service type and status. To control monitoring, select or clear the check boxes in the **Monitored** column. Monitoring is available only for service components.

Note: When a server is deauthorized, if an input on that server attempts to spool in documents, the DBM rejects them and disables the input service. The DBM does not route documents to destinations on the deauthorized server and disables the output service.

DBM Activation Status column — Indicates if the Nuance Output Manager DBM Service is activated. This column will display **Activated** or **Not Activated** for DBM components, depending on the activation status.

Add server button

Option not available

Edit server button

Option not available

Remove server button

Option not available

Refresh button

Updates the list of installed components.

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Manage Profiles dialog box

Profiles are used in to configure many different Output Manger settings. This dialog provides a central place for managing all Output Manager profiles.

Profiles are available to any Output Manager service running on any server. Two Output Manager Output Services running on separate different servers can use the same profiles.

You can access this dialog box by click **Tools** > **Profile Manager** in the Output Manager Console. This dialog is also launched to manage specific profile types from various configuration dialogs.

Option	Description
Profile type	This option displays the profile types. Once a profile typ e is selected, all profiles of that type are displayed in the grid. You can create and manage the profiles as necessar y. The following are the available profile types. • Advanced Costing — Used to associate costs with specific printing material and options. • Allowances — Used to restrict users to specific printing and copying balances and how often they are refreshed. • Desktop Client — Used to configure how users may interact with the Desktop Client. • Device — Used to configure billing account prompts that can occur before releasing jobs or at login. • Document Library — Used to specify what library folder to use when documents are sent to the Document Library. Additionally, specifies the file store, any notifications, and how long to keep the documents before deleting. • Document Owner Mapping — • Document Properties — Used to map header data to Output Manager document properties. Only advanced users and professional service engineers should configure this. • Error Handling — Used to specify what should happen to destinations when an error is detected via SNMP or during transmission of a document. • Failover — Used to specify what should happen to documents if they are sent to an inaccessible destination. Included in the failover profiles is the ability to pick alternate destinations where the documents can be routed. • Headers From Data — This profile consists of information that Output Manager can extract from specified locations within the actual document data. This is used in conjunction with the Document Properties Profile and only advanced users and professional service engineers should configure this.

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Option	Description
	• Job Parsing — This profile configures information to be extracted from Postscript, PDF, and PCL documents. This is used in conjunction with the Document Properties Profile and only advanced users and professional service engineers should configure this. • Job Status Mapping — Used to map job status columns and values to known Output Manager columns and values • Job Ticket — These profiles contain information about the document and/or how the document should be treated. This profile is used in conjunction with the Document Properties Profile and only advanced users and professional service engineers should configure this. • MFP ACL — Used to specify what MFP functionality is allowed. • MFP Kiosk Preferences — Used to specify what document properties are available on the kiosk and in what order. • Native Header — These profiles contain information that arrives as part of the transmission protocol used to receive documents. This profile is used in conjunction with the Document Properties Profile and only advanced users and professional service engineers should configure this. • Notification — Used to specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. • Outbound Email — Used to configure how email notifications are to connect to the email server, and specify how the sender and Reply to address appears. These profiles are used business rules, alert rules, and in Notification Profiles. • Output Process — Used to modify document data while sending a document to a destination. An output process contain a predefined set of actions which impacts a document as it is being sent to a destination. Examples include search and replace, setting finishing options, inserting overlays, and so on. Output processes can be associated with destinations or documents. If associated with a destination, any document being sent to the respective destination goes through the process. If

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Option	Description
	associated with the document, the process is executed no matter which destination the document goes to. • Printer Family — Output Manager includes printer families. Printer family profiles are used to group printers of the same type. These profiles can be selected in Output Manager to have an action only occur for the printers in that specific printer family. This allows Output Manager to use printer specific commands that are associated with our common commands. • Source Properties — Used to configure what print preferences/document properties are supported by AutoStore, Windows queues, and Web Upload sources. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured for the source. • User Print Rules — Used to configure restrictions for users and groups based on the type of document being printed. For example, precluding color printer, or documents that exceed a certain number of pages. • Windows Queue Print Rules — Used to configure restrictions for Windows Queues based on the type of document being printed. For example, precluding color printer, or documents that exceed a certain number of pages. • Workstation Advanced Costing — Used to associate costs with specific printing material and options for a workstation.
Profiles grid	Lists all of the defined profiles for the selected profile ty pe. • **Profile Name** column — Displays the name of the profile. • **Description** column — Displays a description of the profile.
New	Click this button to create a new profile. The dialog box t hat opens varies depending on the selected profile type: • **Advanced Costing Profile** • **Allowances Profile** • **Desktop Client Profile** • **Device Profile** • **Document Library Profile** • **Document Owner Mapping Profile** • **Document Properties Profile** • **Error Handling Profile**

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Option	Description
	• **Failover Profile** • **Headers From Data Profile** • **Job Parsing Profile** • **Job Status Mapping Profile** • **Job Ticket Profile** • **MFP ACL Profile** • **MFP Kiosk Profile** • **Native Header Profile** • **Notification Profile** • **Outbound Email Profile** • **Output Process Profile** • **Printer Family Profile** • **Source Properties Profile** • **User Print Rules Profile** • **Windows Queue Print Rules Profile** • **Workstation Advanced Costing Profile**
Edit	Click this button to open the selected profile for modifica tion. The dialog box that opens varies depending on the s elected profile type.
Delete	Click this button to delete the selected profile. This is on ly enabled if the selected profile is not a system (or defau lt) profile.
Rename	Click this button to rename the selected profile. This is o nly enabled if the selected profile is not a system (or def ault) profile.
Copy	Click this button to create a copy of the selected profile a nd adds it to the **Profiles** grid.
Import	Click this button to import a profile. The file must be a p reviously exported Output Manager profile in XML form at.
Export	Click this button to export a profile. Exported profile file s contain the profile name, type, description, and the prof ile data in an XML format. The exported profiles can be i mported into another Output Manager

Manage Resources dialog box

Use this dialog box to manage output process resources of a selected type (Banner, Binary, CpMillUnitLibrary, CPMillProfile, CsvDocProp, FCB, Ini, PrinterControlFile, Text). You can access this dialog when you configure the action parameter in the **Action Configuration** pane of the **Process Designer**.

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Option	Description
Resource list	The table lists currently defined resources for the selecte d resource type. Columns in the table show the current se ttings for a resource: • **Resource Name** — Displays the name of the resource. • **Resource Description** — Displays a description of the resource. • **Resource Comments** — Displays any additional comments about the resource. • **Data Type** — Displays the data types associated with the resource. • **Printer Family** — Displays the printer families associated with the resource.
New	Click this button to create a new resource. The dialog bo x that opens varies depending on the selected resource ty pe. • CpMillUnitLibrary — Opens the **Configure Unit Library** dialog box. • CPMillProfile — Opens the **Configure Filter Profile** dialog box. • Banner — Opens the **Create Banner Resource** dialog box. • PrinterControlFile — Opens the **Create PrinterControlFile Resource** dialog box. • FCB — Opens the **Create FCB Resource** dialog box. • CsvDocProp — Opens the **Create CsvDocProp Resource** dialog box. • Binary — Opens the **Create Binary Resource** dialog box. • Text — Opens the **Create Text Resource** dialog box. • Ini — Opens the **Create Ini Resource** dialog box.
Edit	Click this button to open the selected resource for mod ification. This opens the **Edit Resource** (or **Configure Resource** for CpMill resources) dialog box, which allow s you to edit options for the selected resource type.
Delete	Click this button to delete the selected resource.
Import	Click this button to import a resource. The file must be a previously exported Nuance Output Manager resource in XML format.
Export	Click this button to export the currently selected resourc e to an XML export file. Exported resources can then be imported into Nuance Output Manager. The XML marku

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Option	Description

	p construct consists of *name*/*value* pairs that correspond t o property settings for a resource. For example:
	
	`<?xml version="1.0"?>`
	`<EomResource>`
	`  <ResourceName ResourceName="resour ce_name" />`
	`  <ResourceDescription ResourceDescr iption="resource_description" />`
	`  <ResourceComments ResourceComments ="optional_comments" />`
	`  <ResourceType ResourceType="Printe rControlFile" />`
	`  <ResourceXML ResourceXML="Unicode (UTF-8)" />`
	`  <ResourcePrinterFamily PrinterFami ly="101" />`
	`  <ResourceDataType ResourceDataType ="999" />`
	`<![CDATA[printer]]></EomRes ource>`

Manage Devices Utility

Use the Administration application **Manage Devices** to configure and manage each Nuance Output Manager SNMP Service. You can determine how frequently the Nuance Output Manager SNMP Service will update Nuance Output Manager destinations that are auto-detected SNMP printers.

SNMP services

The **SNMP services** grid lists all of the servers with the Nuance Output Manager SNMP Service installed and the configuration parameters for each service. From this grid you configure how often the Nuance Output Manager SNMP Service will update Nuance Output Manager destinations that are auto-detected SNMP printers. The SNMP update has two types of values, dynamic and static, each with their own frequency setting.

Note: The **Last Dynamic Update** and **Last Static Update** columns will always display recent values because the printer is being checked for alert status. This occurs even if dynamic and static updates are disabled during configuration.

Configure button — Configures the selected SNMP server. This opens the **SNMP Server Configuration** dialog box.

Detect devices button — Starts the autodetection process for each selected SNMP server. The **Autodetected Devices** grid will update to list any newly detected printers. Note, a printer may be listed multiple times, once from each server where auto-detection was run.

Detect readers button — Opens the **Detect readers** dialog box to search for Ethernet Card Readers for each selected SNMP server.

Autodetected devices

The **Autodetection Devices** grid lists all of the previously detected devices. Notice there are five tabs below the grid, **Unused devices**, **OM devices**, **Ignored devices**, **All devices**, and **Merged devices**.

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Unused devices tab — Lists all of the devices that have not been promoted as Nuance Output Manager devices.

- **Update** button — Updates the selected Nuance Output Manager devices.
- **Promote to OM** button — Promotes the selected devices to Nuance Output Manager Devices and optionally creates new Nuance Output Manager destinations. You can choose from the following destination types: IPP, LPR, and socket. These printers are moved to the **OM devices** tab.
- **Ignore** button — Ignores the selected devices. This will move the selected devices to the **Ignored devices** tab.
- **Delete** button — Deletes the selected devices. This will remove the devices from the Manage SNMP Utility.

OM devices tab — Lists all of the devices that have been added as Nuance Output Manager socket or Nuance Output Manager LPR destinations.

- **Update** button — Updates the selected Nuance Output Manager devices.
- **Merge** button — Allows for merging multiple Nuance Output Manager devices into a single Nuance Output Manager device. You will select the main device from the **Merge Devices** dialog box. This is the device that will display after the merge.
- **Demote** button — Removes the device from the Nuance Output Manager devices tab and places it back on the **Unused devices** tab.

Ignored devices tab — Lists all of the devices that have been ignored on the **Unused devices** tab.

- **Update** button — Updates the selected Nuance Output Manager devices.
- **Restore** button — Restores the selected devices to the **Unused devices** tab.
- **Delete** button — Deletes the selected devices. This will remove the devices from the Manage Devices Utility.

All Devices tab — Lists all of the SNMP devices.

- **Update** button — Updates the selected Nuance Output Manager devices.
- **Delete** button — Deletes the selected devices. This will remove the devices from the Manage Devices Utility.

Merged devices tab — Lists all of the merged Nuance Output Manager devices.

- **Update** button — Updates the selected Nuance Output Manager devices.
- **Unmerge** button — Unmerges the selected devices.
- **Delete** button — Deletes the selected devices. This will remove the devices from the Manage Devices Utility.

Manage Windows Queue Quota Profiles dialog box

Nuance Output Manager includes quota management for Windows queues. Quota management is used to set up restrictions based on the document properties. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on. Use this dialog box to manage Windows queue quota profiles.

Profiles

Lists all of the defined Windows queues quota profiles. The Default profile can be edited and copied, but cannot be deleted.

Buttons

New button — Creates a new Windows queue quota profile. Displays the **Windows Queue Quota Profile** dialog box.

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Edit button — Opens the selected Windows queue profile for modification. Displays the **Windows Queue Quota Profile** dialog box for basic profiles. If the profile was converted to an advanced profile, the **Windows Queue Quota Rules Manager** dialog box displays.

Delete button — Deletes the selected Windows queue quota profile.

Rename button — Allows for renaming the selected Windows queue quota profile. You will type the new name directly in the grid.

Copy button — Creates a copy of the selected profile. The new profile will be named "Copy of *profile_name*".

Import button — Allows for importing Windows queue quota profiles.

Export button — Allows for exporting Windows queue quota profiles.

Manage Windows Queues Utility

Use the **Manage Windows Queues** utility to assign quota management profiles to Windows queues on servers and to assign quota management profiles and printing costs to Windows queues on workstations.

This utility is opened in the **Output Manager Console** by clicking **Applications** > **Administration** > **Manage Windows Queues**. Options are configured on the **Server** tab for Windows queues on servers and on the on the **Workstation** tab for Windows queues on workstations.

Tab	Description
Server tab on page 575	Use this tab in the **Manage Windows Queues** utility to assign quota management profiles to server Windows queues.
Workstation tab on page 576	Use this tab in the **Manage Windows Queues** utility to assign quota management profiles and printing costs to workstation Windows queues.

Server tab

Use this tab in the **Manage Windows Queues** utility to assign quota management profiles to server Windows queues.

A server queue is a Windows queue that has been converted into a Nuance Output Manager source. Server queues use the Output Manager Output Service so that the data is received into the Nuance Output Manager spool.

Quota management profiles can be configured to set up restrictions based on document properties. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

Windows queues grid

Use this grid to assign quota profiles to server Windows queues.

Server Name — Displays the server name where the source (Windows queue) is located. By default the grid is grouped by the server name. This allows you to easily view all queues for a server. You can remove grouping by right clicking in the group panel and selecting **Clear Grouping**.

Source/Windows Queue — Displays the source (Windows queue) name.

Source Group — Displays the group that contains the source.

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Quota Profile — Specifies the quota management profile assigned to this source (Windows queue). The quota profile sets up restrictions based on the type of document, for example, disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on. To select a profile, click in the cell and select a profile from the list. To manage profiles, click the Browse button to display the **Manage Windows Queue Quota Profiles** dialog box.

Refresh button

Updates the grid with any changes.

Workstation tab

Use this tab in the **Manage Windows Queues** utility to assign quota management profiles and printing costs to workstation Windows queues.

A workstation queue is a Windows printer that is not a Nuance Output Manager source (for example, a USB attached printer on an end user's workstation). The data is not received into Nuance Output Manager, but print jobs can be tracked by the Output Manager Desktop Client for billing purposes.

Quota management profiles can be configured to set up restrictions based on document properties. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

Windows queues grid

Use this grid to assign quota profiles and printing costs to external Windows queues.

Server Name — Displays the server name where the source (Windows queue) is located. By default the grid is grouped by the server name. This allows you to easily view all queues for a server. You can remove grouping by right clicking in the group panel and selecting **Clear Grouping**.

Source/Windows Queue — Displays the source (Windows queue) name.

Source Group — Displays the group that contains the source.

Quota Profile — Specifies the quota management profile assigned to this source (Windows queue). The quota profile sets up restrictions based on the type of document, for example, disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on. To select a profile, click in the cell and select a profile from the list. To manage profiles, click the browse button (**...**) to display the **Manage Windows Queue Quota Profiles** dialog box.

Cost per Page (B&W) — Sets the printing cost per page for black and white documents.

Cost per Page (Color) — Sets the printing cost per page for color documents.

Do not track — Specifies that you do not want to track jobs from the Windows queue.

Refresh button

Updates the grid with any changes.

Merge Package dialog box

Use this dialog box to configure a merge package ad hoc rule action. You can access this dialog when you configure the action from the **Ad Hoc Rule** dialog box or when you create and run the action against documents in the **Documents** grid.

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Transform

Click the **Configure** button to configure the transform. The **Configure Transform** dialog box displays.

Package boundaries

Specifies the boundary fields for the merged document. Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.

Click **Configure** to select the fields from the **Package Boundary Fields** dialog box.

Merged Document Properties

Determine if you want to use the document properties from the first page in the documents or the last page in the documents. You cannot select custom properties.

Exception fields

Specifies the exception fields for the merged document. Exception fields specify which document properties to preserve on a per-page basis in the merged document. The document properties will be analyzed to determine the baseline and the exceptions (page overrides).

Click **Configure** to select the fields from the **Exception Fields** dialog box.

Add blank pages for duplexing

Specifies if you need to add blank pages to the merged document for duplexing purposes. This will cause documents to always start on an odd page number.

Original documents

Determines what will happen to the original documents after the merged file has been created. You can leave them in the spooler, move them to retain, or delete them.

MFP Kiosk Preferences Profile dialog box

This dialog box creates or edits a profile for a kiosk and specifies items that are available in the kiosk.

Option	Description
Name	Specifies the name for the profile.
Description	Provides space to describe the purpose of the kiosk.
Available items	Lists items that are available to add to the kiosk. The ite ms shown here depend on the device features and option s.

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Option	Description
	Expand a category to view available items. Select or clear the check box next to an item to add or remove it in the **Selected items** box.
Selected items	Displays a flat list of items that are currently selected in t he **Available items** box. The order shown here is the same that will show in the kiosk. To change the order, select an item and click **Move up** or **Move down**.

Modify Document dialog box

Use this dialog box to define the settings that modify a document for a business rule action or an Advanced Document Modification (ADM) output process action.

You can access the dialog box through the **New Business Rule** dialog box when you configure the **Modify Document Contents** action for Advanced Document Modification. You can also acccess the dialog box through the **Process Designer** when you configure the **Advanced Document Modification** output process action.

Tab options

Options in this dialog box are grouped on the tabs described in the following table:

Tab	Description
Configuration tab on page 482	Use this tab to configure Advanced Document Modification settings for business rules and output process actions.
Document Properties tab (Modify Document) on page 579	Use this tab to configure the document properties during Advanced Document Modification for a business rule.

Configuration tab

Use this tab to configure Advanced Document Modification settings for business rules and output process actions.

In Advanced Document Modification, each page of the document is read, portions of the document can be changed or values extracted, and then the page is written. Documents can be reordered, split, transformed to a different data type, barcodes added, OMR marks added, and logos changed using ADM. ADM can be executed in a business rule action or in the output process.

Server configuration

Server — Specifies the licensed transform server that you would like to use.

Transform package — Specifies the transform package. You can select a transform package from the list or click **New** to create one. You can also select a transform package and modify or remove it.

Additional parameters — Specifies any additional parameters needed for the document modification software.

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Override input filter profile assigned to document — Determines if you want to use the filter profile assigned to the document or if you want to use the filter profile configured in the transform package. Select the check box to use the filter profile in the transform package.

Unit library configuration

Unit library — Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, or page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations.

- **New button** — Creates a unit library from the **Configure Unit Library** dialog box.
- **Modify button** — Modifies the selected unit library.
- **Remove button** — Deletes the selected unit library.

Unit library will create:

Important: This option is only available when configuring ADM actions for business rules.

- **the same document** — Select if your unit library is modifying the input document and writing it to the same location. See the default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created.
- **different documents** — Select if your unit library is modifying the current document and outputting it into a new document, or if your unit library is bursting the document into many different documents. See default comments in unit library for how to tell Nuance Output Manager the names of the new documents that are created
- **multiple documents combined into one** — Currently not available.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Important: Follow on actions are only available when configuring ADM actions for business rules.

Document Properties tab (Modify Document)

Use this tab to configure the document properties during Advanced Document Modification for a business rule.

Properties grid

Configure the document properties by clicking directly in the grid.

Document Property column — Lists the property values that can be configured. The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the print preferences/document properties that belong to that group. The first node level in the categories determine the print preferences for the properties it contains. On the print preference node, you select how the property should be applied when a document is sent to a destination. Under each print preference are the parameters needed to generate that print preference.

Mode column — Specifies how to apply the property value. Click in the cell and choose one of the following options:

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- **Always Apply** — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent.
- **Apply Conditionally** — Applies the property value conditionally. Nuance Output Manager will only add or modify commands for the print preference when the printer family that the document is destined for is different from the printer family the document was originally designed for.
- **Informational Only** — Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.
- **Value Not Set** — No value is set for the property.

Value column — Specifies the document property value. Click directly in the cell to change the value. You can use functions to insert and extract data as necessary.

Native Headers tab

Use the **Native Headers** tab to configure native header profiles. Native headers contain information that arrives as part of the transmission protocol that is used to receive documents.

Click an option you want to learn more about.

- *Document Property Mappings tab* on page 541
- *Document Owner Mapping tab* on page 537

Name

Specifies the name of the native header profile.

Description

Specifies a description of the native header profile.

Select the OM device types whose headers should be available for mapping

Specifies the native headers that are available for mapping. The selected native headers will be available on the **Document property mappings** tab and the **Document owner mapping** tab.

- Email
- FTP
- LPD
- Network folder
- Socket
- WebSphere MQ
- Windows queue
- BEPS devices (NJE, RJE, Print Channel, and so on)

New Device dialog box

Use this dialog box to add a new device to the Devices application.

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Name

Specifies the device name.

Server

Specifies the Nuance Output Manager server where the Nuance Output Manager Output Service is located for this device.

IP Address

Specifies the IP address of the device you are adding.

Notification Profile dialog box

Nuance Output Manager allows you to send notifications when specific events occur in the document life cycle. Notifications are sent according to defined notification profiles. Notification profiles specify which events generate notifications (document arrives, prints successfully, prints on failover destination, or is in error state), the type of notification for each event (email or pop-up), the text of notifications for each event, and who should get notified. For example, you can configure a pop-up to display after a document prints successfully. Use this dialog box to create and configure notification profiles.

You can access this dialog box when you configure a source, create a business rule with a notification profile, or assign a notification profile in the **Documents** grid.

Name

Specifies the notification profile name.

Description

Specifies a description of the notification profile.

Email profile

Specifies the email profile that will be used with email notifications within this profile. You can select an email profile from the list or click the Browse button and mange profiles in the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles using the **Outbound Email Profile** dialog box.

Notifications grid

Configures the notifications that will be sent. Click directly in the grid to configure the notification.

When the document — Specifies when a notification will be sent. You can choose to send a notification when a document Arrives, Prints Successfully, Prints on Failover Destination, or Is In Error State.

Send notification via — Specifies how the notification will be sent and displayed. You can send notifications using the Tray Client Popup or as an Email Message.

Notify owner — Determines if the document owner will be sent a notification.

Recipients — Specifies the who will receive the notification. Click the browse button (**...**) to select users and groups in the **User and Group Selection** dialog box. If the user or group you want is not listed, click **More Users** to search

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for additional users. See the *Adding users and groups to Nuance Output Manager* topic for detailed procedures on adding users.

Message — Specifies the notification text. By default text is provided specific to each notification type. You can click the grid cell to make any text changes. The message can consist of text, one or more document properties, and functions.

To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]). This allows notifications to contain text relevant to the specific document that is generating the notification.

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Add/Remove buttons

Adds and removes notifications in the **Notifications** grid.

OM Group dialog box

Use this dialog box to add Nuance Output Manager groups to Nuance Output Manager. Once the groups are added, quotas can be assigned to the group as needed. Once quotas are assigned to a group, all members of the group will be assigned the quota. You can override the group quota assignment by adjusting the individual Nuance Output Manager users settings on the **Users** tab in the **Manage Users** utility. You can access this dialog box when configuring group quotas from the **Groups** tab.

Group name

Specifies the Nuance Output Manager group name.

Email address

Specifies the email address of the group.

Select the users you want to add to the group

Displays all of the Nuance Output Manager users. Select the check box column for the users you want to add to this group and click the right arrow (>) button. This moves the selected users into the **Group members** grid.

Arrow buttons

Right arrow (>) button — Moves the selected users into the **Group members** grid.

Double right arrow (>>) button — Moves all users into the **Group members** grid.

Left arrow (<) button — Removes the selected users from the group and places them back in the **Select users** grid.

Double left arrow (<<) button — Removes all users from the group and places them back in the **Select users** grid.

Group members

Displays the users that are a member of the group. To remove users from the group, select the check box column for the appropriate users and click the left arrow (<) button. This moves the selected users back into the into the **Select users** grid.

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OM Server Configuration Utility

Use this utility to configure services, security, SSL certificates for the Output Manager server.

The **Output Manager Server Configuration Utility** is opened from the Windows desktop by clicking **Start** > **All Programs** > **Output Manager** > **Output Manager Server** > **OM Server Configuration**. Configure options on the following tabs:

Tab	Description
Output Manager services configuration	Use this tab to manage Nuance Output Manager services.
Output Manager security administration	Use this tab to configure Nuance Output Manager administrators.
SSL Certificate Manager	Use this tab to configure SSL certificates and bind them to ports for selected web services on Output Manager server.

Output Manager Services Configuration tab

Use this tab to manage Nuance Output Manager services.

You will use this tab when installing and removing the Nuance Output Manager software. You can access this utility by clicking **Start** > **All Programs** > **NSi** > **NSi Output Manager Server** > **OM Server Configuration**.

Click on the option to learn more about it.

- *OM Security Administration tab* on page 585
- *SSL Certificate Manager tab* on page 585

High availability options

Use HA — Select to use the physical Nuance Output Manager server in a high availability configuration. In a high availability configuration, multiple back-end physical Nuance Output Manager servers function as a single logical Nuance Output Manager server that receives client requests through a load balancer.

HA name — Specifies the name of the single logical Nuance Output Manager server. The load balancer physical server can use this name as a DNS alias to facilitate communication between clients and the single logical Nuance Output Manager server.

OM DBM Configuration

Displays the configuration for the Nuance Output Manager DBM Service. There can be only one Nuance Output Manager DBM Service per server. Configure the service by clicking in the column cells.

Use SQL Server Express LocalDB — Configures the DBM Service to connect to the local instance of SQL Server Express.

Use MultiSubnetFailover — For implementations that have SQL Server multi-subnet failover cluster configurations, select this option to configure the DBM Service to connect to the availability group listener of a SQL Server 2012 (or later) availability group or a SQL Server 2012 (or later) Failover Cluster Instance. Refer to Microsoft SQL Server Help for more information on multi-subnet failover clustering.

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Failover partner — Specifies the principal or mirror SQL Server instance to which the DBM Service connects. The instance acts as a role-switching partner for a mirrored database. Refer to Microsoft SQL Server Help for more information on database mirroring and failover partners.

SQL Server Instance column — Specifies the SQL Server\Instance.

SQL Authentication Type column — Specifies the SQL authentication type. You can select SQL or Windows. Selecting SQL displays the **Specify SQL User** dialog box where you enter an SQL authenticated user name and password.

Database Name column — Specifies the Nuance Output Manager database.

Service Logon Credentials column — Specifies how the service will log on. You can decide if it will log on as a local system account or you can enter a specific account. Use Local System Account if the DBM will communicate with the local SQL database, local Nuance Output Manager services, and local file resources. All other cases use a Windows Service account for the log on. In most cases, you will choose **This account** and select the service logon account. Selecting an account will require you to complete the password boxes.

Status column — Displays the status of the Nuance Output Manager DBM Service.

OM Service Configuration

Service column — Displays the Nuance Output Manager Input Service, Nuance Output Manager Output Service, Nuance Output Manager SNMP Service, and the Nuance Output Manager Rules Agent Service. Configure the services by clicking in the **Selected** column and then the other column cells.

OM DBM Host Name column — Specifies the name of the computer that is running the Output Manager DBM Service. You will need to select the domain and computer.

If you selected **Use HA** and specified a high availability configuration name for **HA name**, you cannot change the **OM DBM Host Name** values for the Output Service and the Rules Agent Service because those services use the high availability DBM server.

Service Logon Credentials column — Specifies how the service will log on. You can decide if it will log on as a local system account or you can enter a specific account. Use Local System Account if the DBM will communicate with the local SQL database, local Nuance Output Manager services, and local file resources. All other cases use a Windows Service account for the log on. In most cases, you will choose **This account** and select the service logon account. Selecting an account will require you to complete the password boxes.

Status column — Displays the status of each Nuance Output Manager service.

Protocol column — Displays the protocol for the connection between the Output Manager service and the DBM Service.

Select all services

Selects all services listed in the grid.

Start Selected Service button

Starts all selected services.

Stop Selected Service button

Stops all selected services.

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OM Security Administration tab

Use this tab to configure Nuance Output Manager administrators.

When installing the Nuance Output Manager software, you can use this tab to add users that will have full administrative rights to the Output Manager Console. These users must be a member of the Administrative group on the server and have administrative rights to the database. It is important to remember that the users added here will have unrestricted rights to **Start** > **All Programs** > **NSi** > **NSi Output Manager Server** > **OM Server Configuration**

Click on the option to learn more about it.

- *Output Manager Services Configuration tab* on page 583

Initialize Security Configuration

SQL Server\Instance — Specifies the SQL Server\Instance name.

Database — Specifies the database name.

Authentication — Specifies if you will use Windows authentication or SQL Server authentication. If you select SQL Server authentication, you will need to enter the appropriate **Login** and **Password**.

Connect button — Connects to the specified database. The connection status will display in the text box.

Users and Groups

Lists users with unrestricted rights to Nuance Output Manager. These users must be a member of the Administrative group on the server and have administrative rights to the database. It is important to remember that the users added here will have unrestricted rights to Nuance Output Manager.

Add button — Adds users that will have full administrative rights to the Output Manager Console. Users are selected from the **Users and Groups** dialog that is displayed.

Add Current User — Adds the currently signed in user to list. The user will have full administrative rights to the Output Manager Console.

Remove button — Removes the selected user.

SSL Certificate Manager tab

Use this tab to configure SSL certificates and bind them to ports for selected web services on Output Manager server.

Use this tab to create and assign certificates and bind ports to enable SSL on selected web servers on an Output Management server

Option	Description
Choose Certificate	Specifies a certificate to use for configuring SSL. To cre ate a new certificate, choose <New self signed...> and en ter a password in the **Certificate Password** box. To bro wse for an existing certificate, choose the <browse>, and in the **Open** dialog box, find an existing certificate (.pfx) file. You can click the browse button (**...**) to specify or cr eate a folder location.
Certificate Name	Show the name of a specified certificate.

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Option	Description
Certificate Password	Type the password for a certificate in this box. When you are creating a new certificate you will need to retype the password in the **Confirm Password** box.
Output manager service ports	Allows you to select a port number for binding or unbinding a port to a server.
Web service ports	Configures certificate assignments and binding for a particular web service specified by the **Service Key**.
Generate	Click to generate a new certificate.
Assign	Click to assign a certificate to a selected **Service Key**.
Un-assign	Click to unassign a certificate from a selected **Service Key**.

OM User dialog box

Use this dialog box to add Nuance Output Manager users to the Nuance Output Manager database. Once the users are in the database, permissions can be assigned as needed. You can access this dialog box by clicking the **More Users** button and selecting **Add OM User** on the **User and Group Selection** dialog box or **Users** tab.

User name

Specifies the user name that will be used when logging in to the server.

Full name

Specifies the user's complete name. This is the name that will display on the **User and Group Selection** dialog box.

Password

Specifies the user password that will be used when logging in to the server.

Confirm password

Confirms the password entered in the **Password** box.

Email address

Specifies the email address of the user.

Department

Specifies if the user is a member of a department. You can select one of the departments in the list, or click **New** to create a department from the **Department** dialog box.

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User must change password at next logon

Allows you to require the user to change the password at the next logon. If selected, the user will be prompted to enter a new password.

Password never expires

Allows you to determine if the password for this user will expire.

Account is disabled

Allows you to disable this account.

Opening Windows Utilities

Several Windows utilities are used to configure and manage Nuance Output Manager. The method of displaying the utility may vary depending on your operating system.

- *Open the Add Printer Wizard*
- *Open the Event Viewer*
- *Open Microsoft SNA Manager*
- *Open the Network utility*
- *Open the devices utility*
- *Open the Windows Printers folder*
- *Open the Services utility*
- *Open the user utility*
- *Open Windows Explorer*
- *Open Windows Notepad*
- *Open the Add or Remove Programs*

Opening the Add Printer Wizard

You need to define Windows printers to use with Nuance Output Manager. Windows printers are defined with the Windows Add Printer wizard.

- On the Windows taskbar, click **Start** > **Printers & Faxes**. Under **Printer Tasks**, click **Add a printer**, or right-click in the window and click **Add Printer**.

Opening the Event Viewer

The Event Viewer maintains logs about programs, security, and systems events on your computer. With Event Viewer, you can troubleshoot various hardware and software problems.

- On the Windows taskbar, click **Start** > **Control Panel** > **Administrative Tools Event Viewer**.

Opening Microsoft SNA Manager

For SNA Server

- On the Windows taskbar, click **Start** > **Programs** > **Microsoft SNA Server** > **Manager**.

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For the Host Integration Server

- On the Windows taskbar, click **Start** > **Programs** > **Host Integration Server** > **Manager**.

Opening the Network utility

The Network utility configures network hardware and software.

- On the Windows taskbar, click **Start** > **Control Panel** > **Network Connections**.

Opening the Devices Utility

The devices utility starts and stops device drivers.

- On the Windows taskbar, click **Start** > **Control Panel** > **System**.

This opens the **System Properties** dialog box. On the **Hardware** tab click **Device Manager**. If you need additional instructions, refer to the Microsoft device manager Help.

Opening the Windows Printers folder

You need to define Windows printers to use with Nuance Output Manager. The printers consist of a port and a device driver, which can be configured in the Printers folder.

- On the Windows taskbar, click **Start Printers and Faxes**.

Opening the Services utility

Output Manager Print Server implements several services that run under Microsoft Windows. Starting and stopping these services is an essential part of operating the Output Manager Print Server. Use one of the following methods to open the Services utility.

- On the Windows taskbar, click **Start** > **Control Panel** > **Administrative Tools** > **Component Services**. In the **Console Root** tree, click **Services**.

Opening the user utility

You can use the user utility to assign individual users to a group account. The user utility is a Windows program that is used to create and manage user accounts, create and manage groups, and manage security policies.

1. On the Windows taskbar, click **Start** > **Control Panel** > **User Accounts**.
2. In the **User Accounts** dialog box, click **Advanced** on the **Advanced** tab to access **Local Users and Groups**.

Opening Windows Explorer

Windows Explorer displays the hierarchical structure of files, folders, and drives on your computer. You can use Windows Explorer for tasks such as copying, moving, and deleting files.

- On the Windows taskbar, click **Start** > **All Programs** > **Accessories** > **Windows Explorer**.

Opening Windows Notepad

Windows Notepad creates and edits text files using basic text formatting. You can use Notepad to edit files.

- On the taskbar, click **Start** > **All Programs** > **Accessories** > **Notepad**.

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Opening the Add or Remove Programs

The Add or Remove Programs utility adds and removes software on your computer.

- On the Windows taskbar, click **Start** > **Control Panel** > **Add or Remove Programs**.

Organizational Units Container Specification dialog box

After you have specified an LDAP server, you must specify the Organizational Unit (OU) container to search. You will choose users, groups, or both users and groups to import from this container.

Container for groups

Specifies the Distinguished Name (DN) of the LDAP container from which to import groups.

Group object class

Specifies the object class within the container from which to import groups. The administrator can click the arrow in the box to choose a value or enter another value.

Container for users

Specifies the Distinguished Name (DN) of the LDAP container from which to import users.

Outbound Email Profile dialog box

This dialog box is used when you create business rules or alert rules that will send an email message. Use this dialog box to create and configure email profiles.

Name

Specifies the name of the email profile.

Description

Specifies a description of the email profile.

Configuration settings

Email server — Specifies the mail exchange server. You can type in the box or click the Browse button to display the **Mail Server Search** dialog box and search for one on a given domain.

Port — Specifies the POP3 port number. Port numbers may be different based on the email application that was used to set up the email account. The default port number is 25.

Log into server check box — Determines if you want to log in to the server. When this option is selected the **User name**, **Password**, and **Confirm password** boxes are available.

User name — Specifies the user name that will be used when logging in to the server.

Password — Specifies the user password that will be used when logging in to the server.

Confirm password — Confirms the password entered in the **Password** box.

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Connection security — Specifies the type of connection security to use. You can choose None, Auto, TLS, or SSL.

From address — Specifies the email address that will be shown as the sender.

Reply to address — Specifies the email address where replies will be routed.

Output Options tab

Use this tab to configure transform output options. These options will be applied when writing the file (output). Typically these options should be left at the default settings.

You can access this dialog box when you configure a transform action for business rules, ad hoc rules, or output processes, or when configuring an IPDS destination.

Notice: Please note that the IPDS output option is not available for new sales.

Note: Most text fields allow document properties to be entered, using a right click menu. The document properties are converted to the current document property values when the transform is executed.

Click an option you want to learn more about.

- *Input Options tab* on page 553
- *Page Layout tab* on page 595
- *PDF Output tab* on page 596

General output options

- **Convert to image** — Converts each page to an image on output.
- **Copy comments** — Copies the comments stored in the input file.

Note: It is not guaranteed that all of the comments specified in the input file can be copied to the output file. For example, TIFF files accept only one comment.

- **Replace patterns with grayscale** — Replaces fill patterns with grayscale to reduce the file size and improve appearance in some cases, for example, when input and output files have different resolutions and the fill patterns would have to be rendered to images otherwise.
- **No binary copy** — Disables binary copying. This should be set with same-to-same transforms that need to adjust the pages in the document.
- **Convert to grayscale** — Converts color documents to black and white documents.
- **Add empty blank page for duplex** — Adds an empty page at the end of the input document, if the page number is odd.
- **Complete duplex** — Generates the output file using duplex.
- **Delete duplicate items on page** — Deletes any duplicate items on the page.
- **Suppress blank pages in output file** — Removes all blank pages from the output file. This is useful when converting duplex documents into PDF for viewing.
- **Send duplicate images as overlays** — Decreases the file size by sending repeated images as overlay files, which are called as needed, rather than including the entire image each time.
- **Embed fonts based on profile** — Embeds fonts in the output file according to profile specification.
- **Adjust overlay size** — Adjusts the size of the overlay to the size of the overlay contents.
- **Obfuscate text** — Changes the text to be unreadable when writing the page (output). This is helpful if you are dealing with sensitive customer documents. Obfuscate does not work for documents where the text is stored in a custom encoding or as part of an image.

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- **Merge overlapping font subsets** — Minimizes the number of fonts used in a document by merging overlapping subsets into a single font.

Remove

Specifies the items you want to be removed on output.

Page count for PPML page flush

Specifies Personalized Print Markup Language (PPML) page count for each page flush.

Image depth

Specifies the image color depth in bits of the output file. You can select one of the following:

1: Monochrome

8: Grayscale, Palette

24: RGB

32: CMYK

Image type

Specifies the image type of the output file, RGB, CMYK, Grayscale, or Palette.

Render on conversion to image

Specifies the items you want to be rendered on conversion to image.

Transform colors with ICC profile

Transforms all colors using the specified ICC profile to harmonize colors. Enter the ICC profile in the text box.

The ICC profile name can consist of text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Additional output commands

Specifies additional parameters for handling the output file. Output commands can consist of text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Stamp file

Specifies the stamp file name and path. Stamp files can have multiple pages. The last page of a stamp is used for the remaining pages.

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The path can be specified using text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Note: If there is a need for additional changes to the output document, you can create a business rule action to modify document contents.

Watermark file

Specifies the watermark file name and path.

The path can be specified using text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Note: If there is a need for additional changes to the output document, you can create a business rule action to modify document contents.

Macro path

Specifies the path where macros are stored.

The path can consist of text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Filter profile

Specifies a filter profile to override the profile configured in the transform package for this input/output combination.

The filter profile can consist of text and one or more document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose a function.

Package Boundary Fields dialog box

Use this dialog box to select the boundary fields for an ad hoc merge package rule. Boundary fields are applicable only if you expect that your merged document contains more than the allowed amount of exceptions in a given document. This maximum number of exceptions is 1000.

Here is an example when you could easily exceed this maximum. You have a merge job where the constituent documents are sets of documents for specific individuals that you are bundling together in a single print job. For each individual there are three documents.

- The first is a mailer page that is intended to be folded around the other two and will show the individual's name and address through a glassine mailer envelope. This document is to be printed white, single-sided, letter paper.

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- The second document is an account summary. This document is to be printed white, double-sided, landscape orientation.
- The third document is a return payment stub. This document is to be printed light blue, single sided, and custom size.

Let us say the system chooses an optimal baseline of white, double-sided, landscape. This means every first document complies with the baseline, but every second and third document is an exception. You have 2300 individuals for which you are creating this bundle. You will end up with a merge job that has 4600 exceptions.

When merging, if the merged document will exceed this maximum number of exceptions, it is split into multiple resultant documents, with each split on a boundary that attempts to maximize the number of pages without exceeding the exception threshold. If you do not specify boundary fields using this dialog box, then the split is arbitrary and will occur where the maximum number of pages can be fit.

By specifying boundary fields you exercise a little more control over where this splitting can occur. In the example scenario above, you will end up with a merge job split into 5 merge documents, each of the first 4 containing pages that comprise roughly 1000 exceptions. For this scenario each merged document will be sent to a high speed printer/processing station. Since the client has five of these high speed processing stations, each merged document is sent to a different one to be printed, folded, and inserted.

The problem with arbitrary splits is that a split may occur on document 1 of a given document set, meaning that merge document 1 has the mailer page for individual *X*, and merge document 2 has the account summary and return payment stub for individual *X*. Since these 2 documents go to different processing stations, there is a problem because these 3 items need to be together in a given merge document and cannot be split. This is where boundary fields are used. Assuming that each individual is defined by a client identifier, and that client identifier is attributed for each constituent document, then you will use that client identifier as a boundary field, so that when the documents are merged, the merge action knows to always keep all pages for documents that are for the same client identifier together when splitting.

Properties grid

Lists the document properties that can be selected as package boundary fields. Boundary fields are only applicable when a merged document will exceed the maximum number of exceptions (currently set at 1000). Merged documents that exceed the exception count will be split into separate documents. Boundary fields are used to control where the merged documents will be split. Each split will be on a boundary that maximizes the number of pages without exceeding the exception threshold. If you do not specify boundary fields, the split is arbitrary and will occur where the maximum number of pages can be fit.

The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Package Manager dialog box

The Package Manager is used to manage which documents are contained in a package. *Package* is an Nuance Output Manager concept used to group documents together for the purpose of routing to a destination as a group, running ad hoc rules on the group, and so forth. By default, each document arriving in Nuance Output Manager will be the only document in its own package bearing the same name as the document.

You can use the Package Manager to move documents from one package to another, remove documents from a package to be in a separate package, and create new packages.

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To open the Package Manager, in the **Documents** list select one or more documents, right-click and click **Package Management**. Only the packages associated with the selected documents will be available for management. For example, if you select 10 documents that were just spooled into Nuance Output Manager, and open the Package Manager, you will be managing 10 packages. Likewise, if you select 10 documents, and 5 out of the 10 are already associated with the same package, and the remaining are single document packages, the utility will be managing 6 packages.

Packages

Lists all of the packages currently being managed by the Package Manager.

Package documents

Lists all of the documents associated with the selected package in the **Packages** list.

Removed documents

Lists all documents that have been removed from the package using the **>** button. If documents remain in this list when **Apply** or **OK** is clicked, they will be repackaged in their own single document packages using the same name as the documents.

New Package button

Creates a new package in the **Packages** list. This opens the **Enter Package Name** dialog box.

Rename button

Renames the selected package in the **Packages** list. This opens the **Enter Package Name** dialog box.

> button

Removes documents from a package. To remove documents, select one or more documents in the **Package documents** list and click the **>** button. The documents will be moved to the **Removed documents** list.

< button

Adds removed documents to the package. To add documents, select one or more documents in the **Removed documents** list and click the **<** button. The documents will be moved to the **Package documents** list.

Up button

Reorders the **Package documents** list by moving the currently selected document up in order.

Down button

Reorders the **Package documents** list by moving the currently selected document down in order.

Save Order button

Saves the currently displayed order of documents in the **Package documents** list. The last saved order will be used when applying the changes to indicate a priority in group value assigned to each document of the group.

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Page Layout tab

Use this tab to configure transform page layout options such as paper size, tray calls, simplex/duplex settings, and some rotation and scaling control of the output document.

You can access this dialog box when you configure a transform action for business rules or output processes or when configuring an IPDS destination.

Click an option you want to learn more about.

- *Input Options tab* on page 553
- *Output Options tab* on page 590
- *PDF Output tab* on page 596

Set page size by

Specifies the page size. This does not scale the page. It crops or expands the page size.

- **Default page size** — Specifies that you want to use the default page size.
- **Paper size** — Specifies the paper size for the output file, with no page scaling. You can insert document properties by right-clicking in the text box, clicking **Insert Document Property**, and choosing the appropriate properties. The document properties will display enclosed in brackets ([]). To insert functions, right-click in the box, click **Insert Function**, and choose a function.
- **Height/Width** — Specifies the page height and width for the output file. You can insert document properties by right-clicking in the text box, clicking **Insert Document Property**, and choosing the properties. The document properties will display enclosed in brackets ([]). To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Input tray

Specifies the tray name containing the paper to be used.

You can specify the tray name using text and document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Output tray

Specifies the tray name where the output file will be printed.

You can specify the tray name using text and document properties. To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

Rotate page on input

Rotates the page on input according to the selected value. Use this option to rotate the page before any modifications have been made.

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Rotate page on output

Rotates the page on output according to the selected value. The rotation will be applied after all document modifications have been made.

Simplex/Duplex

Determines if single-sided or duplex printing will be performed.

- **Simplex** — Performs single-sided printing.
- **Duplex (front)** — Performs duplex printing - front page.
- **Duplex (back)** — Performs duplex printing - back page.

Reduce page to

Reduces the page height and width to a specified pixel value. This option is only available when **Convert to image** is selected on the **Output options** tab.

Shift page

- **On input** — Shifts the page contents after the page has been read from the file (before any modifications have been made). You will specify how far to shift the contents horizontally and vertically.
- **On output** — Shifts the page contents after all page modifications have been applied. You will specify how far to shift the contents horizontally and vertically.

If you choose to shift the contents on output, you can select which items should be shifted: the entire page (default), only those items within the specified rectangle, or all items that are partially within (intersecting with) the given rectangle. If you choose an option other than the default, you will need to specify the rectangle parameters in inches.

PDF Output tab

Use this tab to configure PDF output transform options. You can access this dialog box when you configure a transform with a PDF output format. Transforms can be configured for business rule or output process actions or IPDS destinations.

Notice: Please note that the IPDS output option is not available for new sales.

Click an option you want to learn more about.

- *Input Options tab* on page 553
- *Output Options tab* on page 590
- *Page Layout tab* on page 595

General PDF options

- **Write PDF data stream uncompressed** — Writes the PDF data stream uncompressed in the output file.
- **Disable content extraction for accessibility** — Disables access for content extraction in the output file.
- **Disable document assembly** — Disables document assembly in the output file.
- **Disable copy and paste of contents** — Disables copy and paste operations in the output file.
- **Disable digital copies** — Disables digital copies in the output file.
- **Disable filling of form fields** — Disables filling out form fields in the output file.

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- **Disable printing of document contents** — Disables printing the contents of the output file.
- **Disable changing of comments** — Disables changing the comments in the output file.
- **Disable changing of file data** — Disables changing the output file data.
- **Generate a web-enabled (linearized) PDF** — Generates a web-enabled PDF output file.
- **Generate thumbnails** — Generates thumbnails in the output file.
- **Copy description property info during binary copy** — Copies the contents of the description properties fields, like title and author, to the output file.
- **Generate table of contents if input AFP file contains TLEs** — Creates a table of contents in the output PDF file using information in AFP Tag Logical Element (TLE) structured fields.

Information fields

These fields can consist of text and one or more document properties. You can insert document properties by right-clicking in the text box, clicking **Insert Document Property**, and choosing the appropriate properties. The document properties will display enclosed in brackets ([]). To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

This will override any copied information.

- **Title** — Specifies the title for the output file.
- **Subject** — Specifies the subject for the output file.
- **Author** — Specifies the author information for the output file.
- **Keywords** — Specifies any keywords for the output file.

Page scaling factor

Scales the logical page in output file, for example:

0.5 = 50% of original size

1 = original size (default)

2 = double size

Encryption key length

Specifies the key length (in bits) for encryption of PDF files. Valid values are 40 and 128.

Owner password

Specifies an owner password for the PDF output file.

To insert document properties, right-click in the text box, clicking **Insert Document Property**, and choosing the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

User password

Specifies a user password for the PDF output file.

To insert document properties, right-click in the text box, clicking **Insert Document Property**, and choosing the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function.

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Power Rule dialog box

Power rules allow you to create multiple rules with their own conditions and actions inside of one rule. While all of these rules could be created separately, using power rules allows you to easily group a set of related conditions/actions into a single power rule. For example, you can add as many conditions as necessary referencing multiple fields that will perform multiple actions.

Use this dialog box to configure power rules.

Select conditions

Allows for adding multiple conditions to the rules. When you add a condition, a new column is added to the **Conditions** grid. You will then specify the conjunction, operator, and value for the new condition. Do this by clicking directly in the column for the appropriate rows.

Select actions

Allows for adding multiple actions to the rules. When you add an action, a new column is added to the **Actions** grid. Click in the new action column to configure the action in the appropriate rows.

Rules grid

Each rule contained in the power rule is represented as one row spanning the **Conditions** and **Actions** grids. Click directly in the grids to configure the condition and action statements. Multiple conditions and actions can be created using the buttons above the grid. The conditions and actions are shown as columns in the grids. Use the buttons to the right of the grid to create and manage rules.

Buttons

Use the following buttons to control the individual rules contained in the power rule. Each rule is represented as one row spanning the **Conditions** and **Actions** grids.

Add button — Creates a new rule. A row will be added to the bottom of both grids.

Remove button — Deletes the selected rule. The selected row will be deleted from both grids.

Copy button — Creates a copy of the selected rule.

Move Up button — Reorders the rules by moving the selected rule up.

Move Down button — Reorders the rules by moving the selected rule down.

Preview window

The preview window allows you to preview the contents of the user grid and print the preview or export the grid to a document, data, or text file.

This window is opened in the **Administration - Manage Users** application by clicking the button on the **Users** tab.

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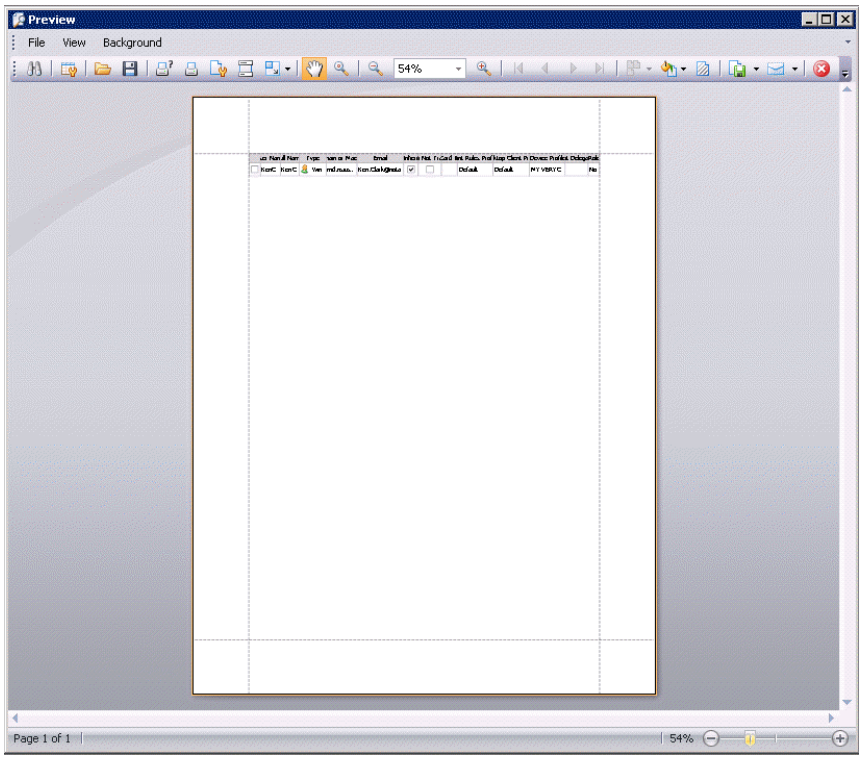

Tool	Name	Description
	Customize	Search for text in the user records.
	Customize	Configure options for viewing user re cords in the **Preview** window.
	Open	Opens a previously save preview doc ument file (`*.prnx`).
	Save	Saves a preview document file (`*.p rnx`) to continue working with the sa me preview later.
	File > **Print...**	Prints using the print dialog box to sp ecify print options.
	File > **Quick Print**	Quick print uses Windows default pr inter settings.
	File > **Page Setup**	
	Header and Footer	Edits header and footer for print or e xport.
	Scale	Menu to **Adjust to % of normal size** or **Fit to # pages wide**.

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Tool	Name	Description
	Hand Tool	Hand tool to drag elements of the vi ew.
	Magnifier	Click image with this tool to change magnification.
54%	Zoom	Click +/- or type or select a percentag e to change magnification.
	Navigation button	Click **First** | **Previous** | **Next** | **Last** b uttons to navigate pages.
	Multiple Pages	Click page number on menu to go to a specific page.
	Background > **Color**	Click menu to select a background c olor.
	Background > **Watermark**	Click to add or edit a watermark ima ge.
	File > **Export Document**	Export user records to a document, i mage, or data file.
	File > **Send via E-Mail**	Export user records to a document, i mage, or data file and send it using th e default email application.
	File > **Exit**	
	View > **Page Layout**	Specifies **Facing** or **Continuous** vie w for multiple pages.
	View > **Toolbar**	Click to display or hide the toolbar.
	View > **Status Bar**	Click to display or hide the status ba r.
	View > **Customize**	Opens dialog box to control display f eatures of the **Preview** window. • **Toolbars**-Display or hide Toolbar, Status Bar, and Main Menu. You can also create, rename, or delete custom toolbars. • **Commands**-Lists **Categories** and **Commands**. • **Options**-Options to personalize menus and toolbars.

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Printer Family Profile dialog box

Use this dialog box to configure printer family profiles. Only a name and description is required.

Name

Specifies the printer family name.

Description

Specifies the printer family description.

Process Designer

The **Process Designer** is a utility used by administrators to create and edit output processes. Output processes are used to modify document data while sending a document to a destination. Banners can be added, transforms can be processed, and various other changes made to the document record format.

The process designer is separated into three panels:

Actions panel	This panel is a tree list of all actions that are available to build the process. The tree's top level nodes represent groupings of similar type actions. Expanding a top level node reveals all the available actions for that group.
Process panel	This panel is where the process is built. An empty process will contain a start and end action image (which are not configurable and cannot be moved or deleted) with a link between representing the flow of the process. To build a process, you drag actions from the tree list and drop them on the link between two existing actions.
Action Configuration panel	This is where you configure an individual action. It is populated with all the parameters associated with the action that is currently (or most recently) selected in the **Process** panel.

Output processes can either be associated with a destination or with a document. If associated with a destination, any document being sent to the respective destination goes through the process. If associated with the document, the process is executed no matter which destination the document goes to. The document's process takes precedence over the destinations, unless the check box **Override output process assigned to document** is selected on the Destination's **More settings** tab. This is also where you would associate the output process with a destination. Output processes can be associated with documents through source configuration on the **Output settings** tab, business rules, or by assigning an output process profile from the Document right-click menu.

The **Process Designer** can be accessed by selecting **Tools** > **Process Designer** from the Output Manager Console menu bar or from any area where output processes can be managed using the **Manage Output Process Profiles** dialog box.

Click the area of the window you want to learn more about.

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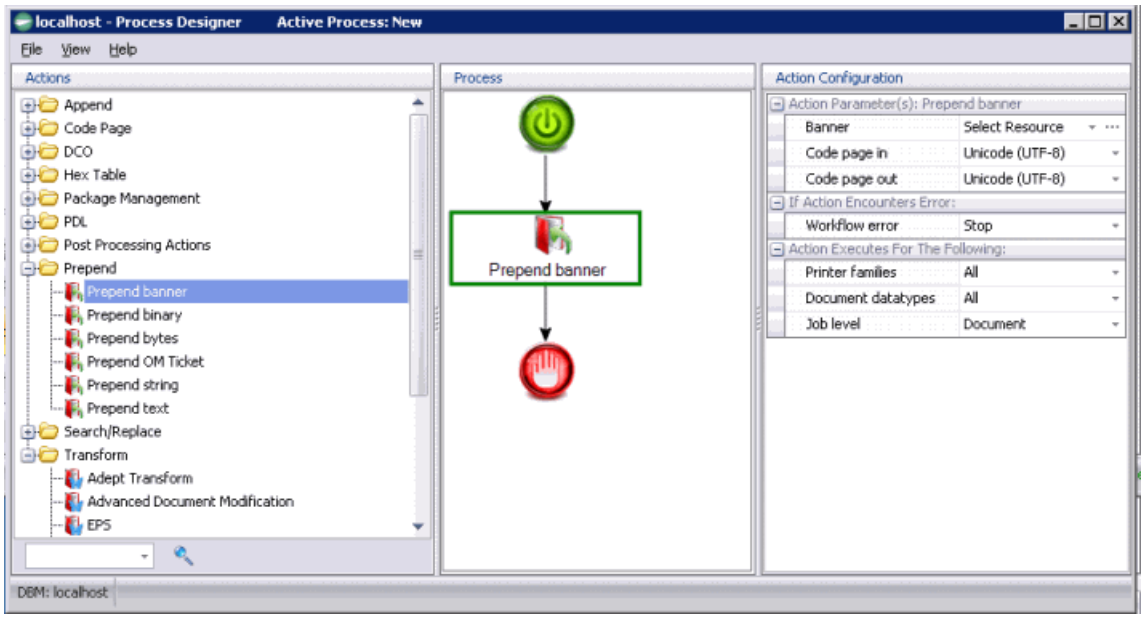

1. *Menu bar* on page 602
2. *Actions panel* on page 603
3. *Process panel* on page 605
4. *Action Configuration panel* on page 606

Menu bar

The menu bar displays below the title bar.

Menu	Command	Description
File	**New**	Starts a new output process in the Process Editor pane.
	Open	Displays the **Open Process** dialog box for selecting the process you want to open.
	Save	Saves the current process. If you are modifying an existing output process, you will enter a process name and description.
	Save As	Saves the current process with a new name. You will enter a process name and description.
	Rename Process	Displays the **Rename Process** dialog box for renaming processes.
	Delete	Displays the **Delete Process** dialog box for selecting the processes you want to delete.

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Menu	Command	Description
	Print Preview	Displays the contents of the Process Editor pane as it looks when printed. From the **Print Preview** window, you can specify the number of pages to view at a time, page through the document, zoom in and out of pages, and print.
	Print	Prints the contents of the **Process Editor** pane.
	Exit	Closes the **Process Designer** window. When you exit, you are prompted to save any changes.
View	**Zoom Canvas**	Allows for setting the zoom level of the Process Editor pane. Displays the **Process Designer Zoom** dialog box.
Help	**Help**	Displays Help for the **Process Designer** window.
	About	Displays program information, version number, and copyright.

Actions panel

The **Actions** panel shows a tree view of all available actions. These actions are available for use in output processes. Click and drag actions from this panel to the **Process** panel. Actions can be configured as necessary after they are added to the **Process** panel.

The top-level folders in the **Actions** tree are used to group related actions. These folders cannot be moved or renamed.

Action types

The following table describes the Nuance Output Manager action types:

Action type	Description
Append	Places data at the end of the document. The item being appended can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.
Code Page	Changes the encoding of a document from one code page to another.
DCO	Allows for record format changes.

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Action type	Description
Hex Table	Allows single or multiple byte substitutions.
Package Management	Configures actions to define or manipulate package contents.
Post Processing Actions	Configures actions to be performed at the end of the output processing.
Prepend	Inserts data at the beginning of the document. The item being inserted can be a set of bytes, a string, a text resource, a binary resource, an Nuance Output Manager job ticket, or a banner resource.
Print Preferences	Modifies document properties and other document attributes to satisfy printer requirements for a specific document.
Search/Replace	Enables bytes and/or strings to be searched and then replaced. The item being replaced can be a set of bytes, a string, a text resource, a binary resource, or a banner resource.
Transform	Performs document transforms. The **EPS** and **EPS Advanced** actions are used for converting LCDS documents for use with an Xerox EPS controller. The **Advanced Document Modification** action allows repurposing of documents.

For more details, see *Output Process Actions*.

Search box

A search box is provided in the Actions pane below the tree. To search, type the text you want to find in the box and press Enter or click the search button next to the box.

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Process panel

The **Process** panel is where the output process is created. The Start and End images are initially displayed in this pane. You can click and drag actions into a process from the **Actions** tree. All you have to do is drag the actions on top of the line linking two actions. Because the placement and order of actions is important, the **Process** editor enforces where actions can be dropped using drop zones. When an action is placed on top of a line linking two actions, it can only be dropped if the line turns green. If the line remains black, the action is not accepted in that location. Actions can be reordered within the drop zone by dragging them to a new position.

Processes are built with a sequence of actions. Some actions must be performed in specific sequences when combined with other actions within the same process. Therefore *landing zones* are enforced within the **Process** panel. Actions are processed in zone order, and the **Process** editor will only allow new actions to be dropped into the proper zones. The following table lists the processing order dependency for actions.

Table 11: Landing zones

Number	Zone	Allowed actions or groups
1	Before processing a document	Prepend
2a	Document conversions	Transforms and DCOs in any order
2b	Document conversions	Search/Replace, Hex Table, and Code Page
3	After processing the document	Append
4	Currently not used	
5	Post processing	Email, Call Method, and Script

There are five exceptions that will override the standard landing zone rules.

Table 12: Landing zone exceptions

Number	Exception
1	Transform, Transform with Banners, Adept Transform, and Advanced Document Modification actions are not allowed anywhere in the workflow after an Apply Print Preferences action.
2	None of the EPS type actions are permitted to be in the same output process workflow with an Apply Print Preferences action.
3	Merge, Set Document Properties, and Make Copies should always occur in that order.
4	If the Set Document Properties action passes all previous exception rules, it is allowed to be anywhere in the output process workflow.

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You can remove actions from an output process by selecting the action in the **Process** panel and pressing **Delete**. When an action is selected, a green box will display around the action.

Action Configuration panel

The **Action Configuration** panel allows for configuring the action selected in the **Process** panel. The configuration options that display vary depending an action. This panel is divided into the following three sections.

Action Parameters	Configures the parameters of a selected action. These vary depending on the action it represents.
If Action Encounters Error	This is common to all actions. It contains a single parameter: • **Workflow error**: It sets what to do in case the action encounters an error. Specify **Stop** to end the process and send an error to the destination, or **Skip** to skip the action and continue executing the remaining process actions.
Action Executes For The Following	This contains the following parameters: • **Printer families**: Common to all actions, it specifies whether or not the action is to be executed depending on the printer family of the destination. Select one or more. The default is All. • **Document data types**: Common to all actions, it specifies whether or not the action is to be executed depending on the document data type being processes. Select one or more. The default is All. • **Job level**: Currently only available for **Append**, **Prepend**, and **EPS Adv W/Banners** actions. Specifies if the action is to be executed at the package or document level. (see Package concept below). Specifying document level would execute the action on each document within a multidocument package. Specifying package level would execute the action on only the first and last document within the package. Thus, the result would be the same if the package contains only one document.

Rename Process dialog box

Use this dialog box to rename output processes from Process Designer. You can access this dialog by selecting **File** > **Rename Process** on the Process Designer menu bar.

Select a process

Displays all of the saved output processes. Select the grid row that contains the process you want to rename. You can then enter a new name and description using the fields below.

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Name

Specifies a new name for the selected output process.

Description

Specifies a new description for the selected output process.

Resource Manager dialog box

The **Resource Manager** provides a central place for managing all Nuance Output Manager resources. Resources are available to any Nuance Output Manager service, running on any server. For example, 2 Nuance Output Manager Output Services running on 2 different servers, could use the same resources. Resources are used in business rule and output process actions. You can access this dialog box by selecting **Tools** > **Resource Manager** in the Output Manager Console.

Option	Description
Resource type	Displays the resource types. Once a resource type is selected, all resources of that type are displayed in the grid. You can create and manage the resources as necessary. You can choose from the following available resource types: • **Banner** — Text files used for banners or trailers that may contain document properties. • **Binary** — Binary files used by output process actions. • **CPMillProfile** — XML files used to define formatting such as fonts and resource locations for a particular file format. This is used when transforming, bursting, extracting data, performing ADM, viewing documents, or reprinting documents. • **CpMillUnitLibrary** — Javascript programs used for Advanced Document Modification. • **CsvDocProp** — Comma separated values representing document properties. • **FCB** — Form Control Block used by DCOs for various record conversions. • **Ini** — Ini files used by output process actions. • **PrinterControlFile** — Reserved for printer control files, not presently used. • **Text** — Text files used by output process actions.
Resource list	The table lists currently defined resources for the selecte d resource type. Columns in the table show the current se ttings for a resource: • **Resource Name** — Displays the name of the resource.

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Option	Description
	• **Resource Description** — Displays a description of the resource. • **Resource Comments** — Displays any additional comments about the resource. • **Data Type** — Displays the data types associated with the resource. • **Printer Family** — Displays the printer families associated with the resource.
New	Click this button to create a new resource. The dialog bo x that opens varies depending on the selected resource ty pe. • CpMillUnitLibrary — Opens the **Configure Unit Library** dialog box. • CPMillProfile — Opens the **Configure Filter Profile** dialog box. • Banner — Opens the **Create Banner Resource** dialog box. • PrinterControlFile — Opens the **Create PrinterControlFile Resource** dialog box. • FCB — Opens the **Create FCB Resource** dialog box. • CsvDocProp — Opens the **Create CsvDocProp Resource** dialog box. • Binary — Opens the **Create Binary Resource** dialog box. • Text — Opens the **Create Text Resource** dialog box. • Ini — Opens the **Create Ini Resource** dialog box.
Edit	Click this button to open the selected resource for mod ification. This opens the **Edit Resource** (or **Configure Resource** for CpMill resources) dialog box, which allow s you to edit options for the selected resource type.
Delete	Click this button to delete the selected resource.
Import	Click this button to import a resource. The file must be a previously exported Nuance Output Manager resource in XML format.

Export	Click this button to export the currently selected resourc e to an XML export file. Exported resources can then be imported into Nuance Output Manager. The XML marku p construct consists of *name*/*value* pairs that correspond t o property settings for a resource. For example:
	`<?xml version="1.0"?>`
	`<EomResource>`

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Option	Description
	<ResourceName ResourceName="*resource_name*" /> <ResourceDescription ResourceDescription="*resource_description*" /> <ResourceComments ResourceComments="*optional_comments*" /> <ResourceType ResourceType="PrinterControlFile" /> <ResourceXML ResourceXML="Unicode (UTF-8)" /> <ResourcePrinterFamily PrinterFamily="101" /> <ResourceDataType ResourceDataType="999" /><![CDATA[printer]]></EomResource>

Banner Resource dialog box

Use this dialog box to configure a banner resource. You can access this dialog box when you create or configure a banner resource in the **Process Designer** or the **Resource Manager** dialog box.

Name

Specifies the name of the banner resource.

Description

Provides a description of the banner resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must contain text data.

Code page — Specifies the code page to be applied to the resource data.

Resource Editor

You can enter text, document properties, and functions in the Resource Editor.

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To insert document properties, right-click in the box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]).

To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager functions* help topic for information on configuring functions.

To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Export button

Allows for exporting the resource data. Unlike the **Export** button in the **Resource Manager** dialog box, this exports only the text data from the **Resource Edit** area to a text file.

Binary Resource dialog box

Use this dialog box to configure a binary resource. You can access this dialog box when you configure a binary resource in the **Process Designer** or the **Resource Manager** dialog box.

Name

Specifies the name of the binary resource.

Description

Provides a description of the binary resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files can be of any type and will be interpreted as byte data.

Resource Editor

The **Resource Editor** box is a special edit area that accepts only hexadecimal digits (0 – 9 and A – F). Enter the binary data without regard to spacing. The spacing is taken care of automatically by the editor.

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To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display a find and replace dialog box.

Create Hex Size

The **Create Hex Size** area can be used to set the data capacity. Entering a number in the text box and clicking the **Create Hex Size** button has the following effect:

- If there is already data in the edit area, any data at or below the new size will remain intact. Any data beyond the new specified size will be erased from the editor.
- If existing data is smaller than the new size, the space after existing data is padded with empty bytes (00) up to the requested size.
- If no data currently exists in the editor when setting the size, the editor is filled with empty bytes (00) up to the requested size.

Export button

Allows for exporting the resource data. Unlike the **Export** button on the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** area to a text file.

Configure Filter Profile dialog box

Use this dialog when you need to create a custom profile for handling a specific data format. You can access this dialog box on the **Filter profiles** tab of the **Transform Package** dialog box, or when you configure a CpMillProfile in the **Resource Manager** dialog box.

Datatype

Specifies the data type of the filter profile.

Create new profile

Specifies if you want to create a new filter profile or modify the selected profile. When a default profile is displayed, this option is selected by default. Check the box and rename the profile to create.

Name

Specifies the filter profile name.

Description

Includes a description of the filter profile.

Comments

Includes any comments to be stored with the filter profile. Click in the box to enter and view comments.

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Filter profile

Defines the filter profile. In most cases, it is best to use the default filter profiles. If you use a third-party transform package to convert formats, refer to the third-party documentation for more information. We recommend contacting Nuance Support for assistance with advanced configuration of filter profiles.

To go to a specific line, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Configure Unit Library dialog box

Use this dialog to configure a unit library. Unit libraries are JavaScript modules that CpMill calls at certain known times while processing a document (for example, begin document, page start, and page end). The modules can modify the contents of the document, extract information from the document, write the document, or parts of it, to a new location, or perform many other operations.

You can access this dialog when configuring a business rule to modify document contents or when using the **Resource Manager**.

Name

Displays the name of the unit library configuration.

Description

Displays text describing the unit library configuration.

Comments

Displays any comments. Click in the drop-down list to enter/view comments.

Document Properties Needed

Specifies the document properties needed by the unit library. These properties will be written to a file called <*filena me*>.properties when Nuance Output Manager calls the document modification software. This file is then opened and read in by the unit library.

Filters Needed

Specifies the filters needed for the unit library. The filters indicate document types that the unit library needs to be aware of in order to fulfill its intent. This includes all expected input, output, and interim document types. These filters will be written to a temporary location which will be sent to the document modification software.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must contain text data.

Code page — Specifies the code page to be applied to the resource data.

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Unit

Specifies the unit library. Review the default comments of a new unit library for descriptions of the parameters sent from Nuance Output Manager to the unit library and information about how to tell Nuance Output Manager about the documents modified or created by the unit library. Enter the unit library code within the `<script> </script>` tags in the appropriate event handler sections.

> **Tip:** Review the default comments of a new unit library for descriptions of the parameters sent from Nuance Output Manager to the unit library and information about how to tell Nuance Output Manager about the documents modified or created by the unit library.

For more information on configuring unit libraries, contact Nuance Communications Professional Services.

To go to a specific line, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Reload Variables from Unit button

Reloads the variables in the unit library and lists any output variables in the **Output variables** grid.

Output variables grid

Displays the output variables in the unit library. This grid is shown for reference only. It cannot be edited.

CsvDocProp Resource dialog box

Use this dialog box to configure a CsvDocProp resource. You can access this dialog box when you configure a CsvDocProp resource in the **Resource Manager** dialog box.

Name

Specifies the name of the CsvDocProp resource.

Description

Provides a description of the CsvDocProp resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

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Import Resource Data

Browse button – Allows for importing resource data. Imported files must contain text data.

Resource Editor

Enter comma separated values (CSV) or text in the box. You can also create a resource with a table of information using the CSV format.

To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Example:

The following example shows columns names and several rows of data (an entry for each column).

"Class Values",	"My Test Forms",	"Res - Settings",	"Other Values",
"A",	"short form",	"100",	"sample string 1",
"B",	"long form",	"200",	"sample string 2",
"C",	"std form",	"300",	"sample string 3"

You can then use the `@LookupCsv` function to look up a value for a field you are configuring.

For example, let's assign a value to a property. Configure a business rule with a **Set Document Properties Basic** action. Using this rule, we will assign a value to the "Custom String1" property. Right-click in the value field for that property, and click the `@LookupCsv` function. Configure the function to supply a value.

1. Choose to locate the CSV file using a **Path** or a **Resource**. In this example, the data for either choice would be in the format described above.
2. Set the **Lookup data** to [Resolution].
3. Set the **Key column name** to Res - Settings.
4. Set the **Data column name** to Class Values.
5. Click **OK**. This configuration will look up the [Resolution] property of the document we're working with and then find that value in the **Res - Settings** column of the lookup data. It will then get the value from the same lookup row in the **Class Values** column.

Running this business rule on a document whose [Resolution] property is "300" would set the CustomString1 property to "C".

Export button

Allows for exporting the resource data. Unlike the **Export** button in the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** area to a text file.

FCB Resource dialog box

Use this dialog box to configure an FCB resource. You can access this dialog box when you configure an FCB resource in the **Process Designer** or the **Resource Manager** dialog box.

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Name

Specifies the name of the FCB resource.

The FCB name is important since the FCB selection from the output process or business rule action will select an FCB resource based on the Document Property field used. In most cases the Document Property **Form Name** field is used as the variable in selecting the FCB resource. For example, if you receive a file from the mainframe via RJE the PDIR record is processed and any form name found is mapped to the Form Name document property. Then during conversion, the corresponding FCB resource will be used to format the report. A PDIR form name of CHKS would expect that there was an FCB resource defined named CHKS and would apply the CHKS FCB resource. If the action cannot find the FCB resource it will apply STD.

Description

Provides a description of the FCB resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must be a binary FCB resource, such as those used by the Output Manager Print Server.

Resource Editor

Lines/Inch — Specifies the line spacing, either 6 or 8 lines-per-inch. You can change the value to 8 to tighten the line spacing and enable more data to fit on a page. The default is 6 lines per inch.

Printable lines/page — Specifies the number of lines that will print per page. For example, if there are 66 **Lines/Page** and you enter 60 **Printable lines/page**, then you will print lines 1 through 60 on each page of the document.

Lines/page — Specifies the page length. This number is calculated by multiplying the length of the paper (usually 11 inches) by the number of lines per page (usually 6). The default is 66 lines per page. This will change the size of the FCB that is sent with the data.

Grid — Lists the currently defined channel stops. Channel stops are used to define vertical spacing. When a printer encounters a command to advance to a channel stop, the print head moves to the specified line and the data is printed. Channel stop 1 usually indicates the top of the form or the first line where the printer will begin printing.

You can change the grid's sort order by clicking the **Channel** or **Line Number** column headings. When you click a column heading, the data of both columns will sort in ascending order based on the column selected.

Add button — Adds a channel stop.

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Remove button — Deletes the selected channel stop.

Export button

Allows for exporting the resource data. Unlike the **Export** button on the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** area to a text file.

PrinterControlFile Resource dialog box

Use this dialog box to configure a printer control file resource. You can access this dialog box when you configure a printer control file resource in the **Resource Manager** dialog box.

Name

Specifies the name of the printer control file resource.

Description

Provides a description of the printer control file resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must contain text data.

Resource Editor

To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Export button

Allows for exporting the resource data. Unlike the **Export** button on the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** area to a text file.

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Resources tab

Use this tab to control the search order for font resources. You can access this tab when you create or modify a transform package in the **Configure Transform** dialog box.

Important: You will need to verify the Adobe and Ghostscript paths are correct and update if necessary.

Click an option you want to learn more about.

- *General tab (Transform Package)* on page 548
- *Filter Profiles tab* on page 546
- *Fonts tab* on page 547

Resources grid

Displays the paths to available resources, primarily font resources, for each data type except AFP and LCDS. AFP and Xerox LCDS resource locations are specified within the filter profile settings. You can add or modify the paths directly in the grid. To add paths, click in the top row of the grid.

Used by column — Specifies the data type. Click in the grid cell to select the data type.

Path column — Specifies the path where the resources are located. Either click in grid cell and type the path or click the browse button (**...**) to navigate to the proper folder.

Type column — Specifies the resource type. Type the resource type in the grid cell. If no type is entered, the extension column should also be left blank and the software will search for resources of all types in the location.

Extension column — Specifies the file extension. Type the extension in the grid cell.

Resolution column — Displays the resolution. This is only used for certain data types, like AFP. If the resolution is specified, resources with that resolution will be searched in that path. If the resolution is not specified, resources of any resolution will be searched in the path.

Role Manager dialog box

Use this dialog box to define and modify the security roles of users and groups. The **Role Manager** utility consists of different types of roles and corresponding security-related permissions that can be granted or denied to each role.

There are three roles defined in Nuance Output Manager: Document Owner, System Administrators, and Security Administrators. The role of Document Owner defines the rights of individual document owners and is limited to Documents and Library applications. The role of System Administrators defines the rights to configure security and includes all applications, that is, Destinations, Sources, Documents, Library, Reports, and Administration. The role of Security Administrator is identical to System Administrator except that a subset of permissions is unavailable for modification to insure that security can always be configured.

Warning: These permissions are set for the role and cannot vary for users or groups within a role.

You can add and remove users and groups from the System Administrator and Security Administrator roles as needed to manage security access; for example, you might want add a system administrator to serve as backup to an established system administrator.

Tip: Permissions can also be set through the Destinations, Sources, and Documents applications, and for the Output Manager Console.

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Access this dialog box by clicking **Tools** > **Security Roles** on the Output Manager Console menu bar.

Role name

Specifies the role. You can choose from the following Nuance Output Manager roles:

- **Document Owner** — Defines the rights, or permissions, of document owners. You can limit or extend the permissions of document owners as appropriate. For example, an administrator who wants to prohibit document owners from assigning documents to destinations would remove this permission. This role is limited to Documents and Library applications.
- **System Administrators** — Defines the members and permissions for system administrators. System administrators can configure and manage all of the security permissions. As with the Document Owner role, you can limit or extend the permissions of system administrators as needed. By default, all permissions are granted to the System Administrators role at the time of installation; you can modify permissions as appropriate for the installation. A company might have several system administrators. This role defines permissions for all applications, that is, Destinations, Sources, Documents, Library, Reports, and Administration.
- **Security Administrators** — Is identical to the role of System Administrator except that a subset of permissions is always unavailable for modification; this safeguard insures that an installation does not accidentally lock itself out of Nuance Output Manager, preventing the configuration of security permissions. A company typically would have only one Security Administrator.

To add members to or remove them from a role, click the arrow and select the role; the **Add** button and **Remove** button will become available. To modify permissions assigned to a role, click the browse button (**…**). This opens the **Manage Roles** dialog box.

Members grid

Displays the members of the selected role. You can add or remove members.

Add — Adds a user or group to the selected role. Click **Add** to open the **User and Group Selection** dialog box. You use this dialog box to add members. If the user or group you want is not listed, click **More Users** to search for additional users. See *Adding users and groups to Nuance Output Manager* for detailed procedures on adding users.

Route to Destination (Advanced) dialog box

This dialog is used when you create business rule actions to route to destinations. This advanced method allows you to use a comma-separated values (CSV) file to dynamically pick destinations based on a document property.

Path/Resource

Specifies how you want to locate the CSV file. You can use one of the following options:

- **Path** — Enter the path and file name of the CSV file, or click the browse button (**...**) to navigate to the file.
- **Resource** — Select the appropriate resource from the list, or in the **Manage CsvDocProp Resources** dialog box, click the browse button (**...**) to choose the resource.

Lookup data

Specifies the document property that will control the routing. The value contained in this document property will determine the row used in the CSV file.

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Tip: For example, the following table shows an example CSV file using the Class property. To route by Class using this example, select **Class** in the **Lookup data** box, enter `MyClass` in the **Key column name** box, and `MyPrinter` in the **Destination column name** box. When the document is routed the value of the Class property will determine which destination is used. For example, if the Class value is A, the document will be routed to printer 1.

MyClass	MyPrinter
A	printer1
B	printer2
C	printer3

Key column name

Specifies the column name in the CSV file that corresponds to the selected document property.

Destination column name

Specifies the column name in your CSV file that contains the destination name where you want the documents routed.

Drop-down list

Determines if you want to replace the destination already assigned to the document or use multiple destination routing and add to the destination already assigned to the document.

Schedule dialog box

You can schedule documents to print at a specific time. For example, you can schedule certain jobs to print on a specific day of the week or you can schedule large jobs to print at night. Documents become eligible to print at the specified time. They might not print at the exact time, depending on how many other eligible documents are ahead of them in the queue.

You can access this dialog box by right-clicking documents in the **Documents grid** and clicking **Schedule**, configuring a business rule to schedule output, or using the @schedule function.

Day

Specifies the day you want to print the document. You can choose to print the documents today, on a specific day, or in the future.

Time

Specifies the time you want to print the document. You can choose to print as soon as possible, at a specific time, or in the future.

String format

Warning: This option is only available when using the @schedule function to insert a time into a string type document property.

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Specifies the format of the date/time string when it is inserted into the document property. You can specify a value or combination of values from the grids below.

Table 13: Standard DateTime format patterns

Format Pattern	Associated Property/Description
d	ShortDatePattern
D	LongDatePattern
f	Full date and time (long date and short time)
F	FullDateTimePattern (long date and long time)
g	General (short date and short time)
G	General (short date and long time)
m, M	MonthDayPattern
o, O	Round-trip date/time pattern; with this format pattern, th e formatting or parsing operation always uses the invaria nt culture
r, R	RFC1123Pattern; with this format pattern, the formatting or parsing operation always uses the invariant culture
s	SortableDateTimePattern (based on ISO 8601) using loc al time; with this format pattern, the formatting or parsin g operation always uses the invariant culture
t	ShortTimePattern
T	LongTimePattern
u	UniversalSortableDateTimePattern using the format for universal time display; with this format pattern, the form atting or parsing operation always uses the invariant cult ure
U	Full date and time (long date and long time) using unive rsal time
y, Y	YearMonthPattern

Table 14: Custom DateTime format patterns

Format	Description
d, %d	The day of the month. Single-digit days do not have a lea ding zero. The application specifies "%d" if the format p attern is not combined with other format patterns.
dd	The day of the month. Single-digit days have a leading z ero.
ddd	The abbreviated name of the day of the week.

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Format	Description
dddd	The full name of the day of the week.
f, %f	The fraction of a second in single-digit precision. The re maining digits are truncated. The application specifies " %f" if the format pattern is not combined with other for mat patterns.
ff	The fraction of a second in double-digit precision. The re maining digits are truncated.
fff	The fraction of a second in three-digit precision. The rem aining digits are truncated.
ffff	The fraction of a second in four-digit precision. The rem aining digits are truncated.
fffff	The fraction of a second in five-digit precision. The rema ining digits are truncated.
ffffff	The fraction of a second in six-digit precision. The remai ning digits are truncated.
fffffff	The fraction of a second in seven-digit precision. The re maining digits are truncated.
F, %F	Displays the most significant digit of the seconds fractio n. Nothing is displayed if the digit is zero. The applicatio n specifies "%F" if the format pattern is not combined wi th other format patterns.
FF	Displays the two most significant digits of the seconds fr action. However, trailing zeros, or two zero digits, are no t displayed.
FFF	Displays the three most significant digits of the seconds f raction. However, trailing zeros, or three zero digits, are not displayed.
FFFF	Displays the four most significant digits of the seconds f raction. However, trailing zeros, or four zero digits, are n ot displayed.
FFFFF	Displays the five most significant digits of the seconds f raction. However, trailing zeros, or five zero digits, are n ot displayed.
FFFFFF	Displays the six most significant digits of the seconds fr action. However, trailing zeros, or six zero digits, are no t displayed.
FFFFFFF	Displays the seven most significant digits of the seconds fraction. However, trailing zeros, or seven zero digits, ar e not displayed.

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Format	Description
gg	The period or era. This pattern is ignored if the date to b e formatted does not have an associated period or era str ing.
h, %h	The hour in a 12-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%h" if the f ormat pattern is not combined with other format patterns.
hh	The hour in a 12-hour clock. Single-digit hours have a le ading zero.
H, %H	The hour in a 24-hour clock. Single-digit hours do not ha ve a leading zero. The application specifies "%H" if the f ormat pattern is not combined with other format patterns.
HH	The hour in a 24-hour clock. Single-digit hours have a le ading zero.
K	Different values of the **Kind** property, that is, Local, Utc , or Unspecified.
m, %m	The minute. Single-digit minutes do not have a leading z ero. The application specifies "%m" if the format pattern is not combined with other format patterns.
mm	The minute. Single-digit minutes have a leading zero.
M, %M	The numeric month. Single-digit months do not have a le ading zero. The application specifies "%M" if the format pattern is not combined with other format patterns.
MM	The numeric month. Single-digit months have a leading zero.
MMM	The abbreviated name of the month.
MMMM	The full name of the month.
s, %s	The second. Single-digit seconds do not have a leading z ero. The application specifies "%s" if the format pattern i s not combined with other format patterns.
ss	The second. Single-digit seconds have a leading zero.
t, %t	The first character in the AM/PM designator, if any. The application specifies "%t" if the format pattern is not co mbined with other format patterns.
tt	The AM/PM designator defined, if any. Your application should use this format pattern for languages for which it is necessary to maintain the distinction between AM and PM. An example is Japanese, for which the AM and PM designators differ in the second character instead of the f irst character.

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Format	Description
y, %y	The year without the century. If the year without the cen tury is less than 10, the year is displayed with no leading zero. The application specifies "%y" if the format pattern is not combined with other format patterns.
yy	The year without the century. If the year without the cen tury is less than 10, the year is displayed with a leading z ero.
yyy	The year in three digits. If the year is less than 100, the y ear is displayed with a leading zero.
yyyy	The year in four or five digits (depending on the calendar used), including the century. Pads with leading zeros to g et four digits. Thai Buddhist and Korean calendars have f ive-digit years. Users selecting the "yyyy" pattern see all five digits without leading zeros for calendars that have f ive digits. Exception: the Japanese and Taiwan calendars always behave as if "yy" is selected.
yyyyy	The year in five digits. Pads with leading zeros to get fiv e digits. Exception: the Japanese and Taiwan calendars al ways behave as if yy is selected.
yyyyyy	The year in six digits. Pads with leading zeros to get six digits. Exception: the Japanese and Taiwan calendars alw ays behave as if "yy" is selected. The pattern can be incl ude "yy" to for more than six digits, with a longer paddin g of leading zeros.
z, %z	The time zone offset ("+" or "-" followed by the hour on ly). Single-digit hours do not have a leading zero. For ex ample, Pacific Standard Time is "-8". The application sp ecifies "%z" if the format pattern is not combined with o ther format patterns.
zz	The time zone offset ("+" or "-" followed by the hour on ly). Single-digit hours have a leading zero. For example, Pacific Standard Time is "-08".
zzz	The full time zone offset ("+" or "-" followed by the hour and minutes). Single-digit hours and minutes have leadin g zeros. For example, Pacific Standard Time is "-08:00".
:	The default time separator.
/	The default date separator.
% *c*	Where *c* is a format pattern if used alone. To use format pattern "d", "f", "F", "h", "m", "s", "t", "y", "z", "H", or "M" by itself, the application specifies "%d", "%f", "%F", "%h", "%m", "%s", "%t", "%y", "%z", "%H", or "%M".

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Format	Description
	The "%" character can be omitted if the format pattern is combined with literal characters or other format patterns.
\ *c*	Where *c* is any character. Displays the character literally . To display the backslash character, the application shou ld use "\\".

Culture

Warning: This option is only available when using the @schedule function to insert a schedule into a string type document property.

Specifies the culture name of the data in the document. The default is the current culture of the computer where the Nuance Output Manager Console is running. When culture is not specified, the culture independent CultureInfo.InvariantCulture is used.

Clear button

Returns the dialog to the default schedule of printing today, as soon as possible.

Schedule Manager dialog box

You can use the **Schedule Manager** to configure a recurring schedule for a task. Tasks can be created to run an ad hoc rule, create and save a report, or create and email a report.

You can access this dialog box by selecting **Tools** > **Schedule Manager** on the Output Manager Console menu bar.

Schedule list

Lists all defined schedules.

Use the check box in the **Enabled** column to determine if the schedule is enabled or disabled.

Add button — Creates a new schedule. You can configure the schedule on the **Schedule** tab and the tasks on the **Tasks** tab.

Modify button — Modifies the selected schedule.

Remove button — Deletes the selected schedule.

Summary

Displays a summary of the selected schedule.

Tasks

Lists the tasks that will be performed in the selected schedule.

Schedule tab (New/Edit Schedule dialog box)

You can use this tab to configure multiple schedules for a set of tasks. You can access this tab when you create or modify a schedule on the **Schedule Manager** dialog box.

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Name

Displays the name of the schedule.

Enabled

Use the check box to enable or disable the schedule. This option is enabled by default.

Description

Displays a description of the schedule.

Summary

Lists the summaries of each schedule. The summary automatically updates as you configure the recurrence pattern and range of recurrence. You can add multiple schedules as needed. The details of the selected schedule will display under **Schedule Entry Detail .**

Schedule Entry Detail

Allows for configuring the recurrence pattern and the range of recurrence for each schedule.

Add button — Creates a new schedule.

Modify button — Modifies the selected schedule.

Remove button — Removes the selected schedule.

Save Edit button — Saves the changes to the selected schedule.

Cancel Edit button — Cancels the changes to the selected schedule.

Recurrence pattern

Configures a **Simple**, **Daily**, or **Monthly** recurrence pattern.

Range of recurrence

Configures the start and end date/time for the schedule. By default the schedule is configured with no end date.

Tasks tab (New/Edit Schedule dialog box)

You can use this tab to configure the tasks that will be included in the scheduled job. You can select a rule to perform, create and save a report, or create and email a report.

You can access this tab when you create or modify a job on the **Schedule Manager** dialog box.

Click on the option to learn more about it.

- *Schedule tab (New/Edit Schedule dialog box)* on page 624

Name

Displays the name of the schedule.

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Description

Displays a description of the schedule.

Enabled

Use the check box to enable or disable the schedule. This option is enabled by default.

Task grid

Lists all of the tasks that will be performed in the schedule.

Add button — Adds a task to the schedule. You can choose to add a task to perform a rule or create a report. Depending on the option selected the **New Task (Perform Rule)** dialog box or **New Task (Create Report)** dialog box is displayed.

Task	Description
Active Directory Synchronization	Synchronize all Active Directory users known to Output Manager using the attribute mapping configurable from **Manage Users**.
Create Report	Configure a task that will create and save a report or create and email a report. This task will be included in a scheduled job.
Import Users and Groups	Configure a task that imports users and groups.
LDAP Synchronization	Synchronize all LDAP users known to Output Manager using the attribute mapping configurable from **Manage Users**.
Output History to Equitrac Import	Configure a task that exports print reporting data for import by Equitrac.
Perform Rule	Configure a task that will perform an ad hoc rule. This task will be included in a scheduled job.
Push Data to Reporting Database	Configure a task that sends report data to a remote database.
Update Output History with Page Counts	Update output history with page counts or any entries that do not have already have a page count.

Modify button — Modifies the selected task.

Remove button — Deletes the selected task from the schedule.

New/Edit Task (Active Directory Synchronization) dialog box

Synchronize all Active Directory users known to Output Manager using the attribute mapping configurable from **Manage Users**.

To access these settings, click **Add** > **Active Directory Synchronization** on the **Tasks** tab of the **Schedule Manager** dialog box.

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Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

New/Edit Task (Create Report) dialog box

Configure a task that will create and save a report or create and email a report. This task will be included in a scheduled job.

To access these settings, click **Add** > **Create Report** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

Save report as a

Saves the report as a PDF or comma separated values (CSV) file in a specified folder. In the box, either type the path where you want the report saved in the box, or click the browse button (**...**) to select the folder. If the Nuance Output Manager Database Manager is on a different machine, you must enter the full UNC path.

Email report as a

Emails the report as a PDF or CSV file. You can either select an email profile from the list, or click the browse button (**...**) to create one in the **Manage Outbound Email Profiles** dialog box.

Use the following options to configure the email messages that will be sent:

Priority — Set the priority level of the email as normal, low, or high.

Subject — Type a subject for the email.

To, **Cc**, **Bcc** — Enter the email addresses that will be sent messages in these. You can enter multiple email addresses separated by a comma.

Reply to — Enter an email address where replies will be routed. You can enter multiple email addresses separated by a comma.

Report to generate

Selects the report that you want to generate.

Report parameters

Configures the parameters for the selected report. The parameters will change depending on the report selected.

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New/Edit Task (Import Users and Groups) dialog box

Configure a task that imports users and groups.

To access these settings, click **Add** > **Import Users and Groups** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

User Import Wizard

Click this button to launch the **User and Group Import Synchronization Wizard**. This wizard configures options to import user data from a file, from a database, from an Active Directory server or from an LDAP server. Selections in this wizard may affect options displayed in this dialog box.

Mapped OM Properties

Shows imported value mappings to Output Manager properties.

Users and groups to synchronize

Lists users and groups that will be syncronized with imported data.

Additional options

Describes additional options selected in the **User and Group Import Synchronization Wizard**.

New/Edit Task (LDAP Synchronization) dialog box

Synchronize all LDAP users known to Output Manager using the attribute mapping configurable from **Manage Users**.

To access these settings, click **Add** > **LDAP Synchronization** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

New/Edit Task (Output History to Equitrac Import) dialog box

Configure a task that exports print reporting data for import by Equitrac.

To access these settings, click **Add** > **Output History to Equitrac Import** on the **Tasks** tab of the **Schedule Manager** dialog box.

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Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

Equitrac Import File Info

Specifies information about the file to which to export print reporting data.

Option	Description
Equitrac Import CSV File	Specifies the full path to the file that that will contain ex ported print reporting data in a comma separated values (CSV) formatted text file. If the Equitrac location is on a different machine, enter a full UNC path.
File mode	Specifies whether to overwrite the destination file.
Time range	Specifies the time interval over with data will be exporte d.

Equitrac CAS Import Info

Specifies CAS server information for Equitrac.

Option	Description
Import to CAS server	Select this check box to import data to a Core Accountin g Server (CAS).
CAS server	The name of the CAS server.
Rules Agent server to run on	The rules agent server to run the task.
Equitrac Import Application	The Equitrac CAS utility that will import data to the CA S server.
Delete CSV file upon success	Select this check box to delete the exported data file after a successful import. Only the file will be created and an e xternal schedular will run the import logic.
Cmd option	Provides space to add command line options for the imp ort process. This option is typically unnecessary, but it m ay be used by product support personnel.

New/Edit Task (Perform Rule) dialog box

Configure a task that will perform an ad hoc rule. This task will be included in a scheduled job.

To access these settings, click **Add** > **Perform Rule** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

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Description

Provides space to describes the purpose of the task.

Choose the rule to perform

Selects the ad hoc rule you want this task to perform. You can select a rule from the list or click the browse button (**...**) to create an ad hoc rule using the **AdHoc Rules Manager** dialog box.

Run mode — You can choose to run the rule using one of the following options:

- **New documents since last run** — Runs the selected rule against any documents that have arrived into the spool since the last time the rule was run.
- **All documents** — Runs the selected rule against all documents in the spool that are not currently in retain.

New/Edit Task (Push Reporting Data to Database) dialog box

Configure a task that sends report data to a remote database.

To access these settings, click **Add** > **Push Data to Reporting Database** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

Remote SQL Server instance

Identifies the Microsoft SQL Server instance that hosts the database where you want to send the report data.

Remote SQL authentication type

Specifies whether the system uses Microsoft Windows or Microsoft SQL Server credentials to connect to the database on the server instance.

User name

Specifies the user name for connecting to the database with Microsoft SQL Server credentials.

Password

Specifies the user name password for connecting to the database with Microsoft SQL Server credentials.

Confirm Password

Confirms the password for connecting to the database with Microsoft SQL Server credentials.

Remote database name

Specifies the name of the database that stores the report data.

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Rules Agent server to run on

Specifies the Nuance Output Manager server that hosts the Rules Agent service that runs the task.

New/Edit Task (Update Output History with Page Counts) dialog box

Update output history with page counts or any entries that do not have already have a page count.

To access these settings, click **Add** > **Update Output History with Page Counts** on the **Tasks** tab of the **Schedule Manager** dialog box.

Name

Specifies the name of the task. You can change the default task name to something specific to your installation.

Description

Provides space to describes the purpose of the task.

Security Configuration dialog box

Use the **Security Configuration** dialog box to define the type of access users and groups have to areas of the Output Manager Console, destinations, sources, and documents. How you open the dialog box, determines the type of permissions you are assigning.

- **OM Console permissions** — From the Output Manager Console menu bar, select **Tools** > **Configure Security**. This will allow you to define the type of access users and groups have to areas of the Output Manager Console. For example, you can assign permissions so that certain users can access the Destinations, Sources, and Documents applications, but are restricted from the Administration application.
- **Destination permissions** — In the **Destinations** navigation pane, right-click the appropriate destination or group and click **Security**. This will allow you to define the type of access users and groups have to destinations and destination groups. For example, you can assign permissions on destinations so that certain users can configure the destination and other users can only print to it.
- **Source permissions** — In the **Sources** navigation pane, right-click the appropriate source or group and click **Security**. This will allow you to define the type of access users and groups have to sources and source groups. For example, you can assign permissions on sources so that certain users can configure the source and other users can only view it.
- **Document folder permissions** — In the **Documents** navigation pane, right-click the appropriate document folder and click **Security**. This will allow you to define the type of access users and groups have to documents within document folders. For example, you can assign permissions on document folders so that certain users can only view the list documents in a folder and other users can view each document.
- **Report permissions** — In the **Reports** navigation pane, right-click the appropriate report or folder and click **Security**. This will allow you to define the type of access users and groups have to reports and report folders. For example, you can assign permissions on reports so that certain users can edit the report and other users can only view it.

Inherit permissions from the parent (for destinations, sources, and document folders)

When a destination, source, or document folder is created, it automatically inherits permissions from its parent object. You can assign additional permissions to inherited permissions, but you cannot selectively clear inherited permissions.

To remove inheritance for an object, you can click the browse (**...**) button to open the **Security Configuration - Change inheritance** dialog box and then choose the Do not inherit option in the drop-down list. At the time that you

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choose this option, you can choose to **Copy permissions from the parent**. This allows you to use the previously inherited settings as the basis for configuring permissions for the object. Removing inheritance for an object will affect all of its descendant objects.

It is good practice to assign permissions using inheritance, as it allows administrators to easily assign and manage permissions for many different descendant objects. Blocking inheritance should only be used to limit access to selected users or to configure special settings for a particular object.

Users and groups with permissions

Lists the users and groups who have permissions assigned to them for the Output Manager Console. The permissions for the selected item are displayed in the **Assigned permissions** list.

Add button

Adds a user or group to the dialog box so that you can assign permissions to the user or group. This opens the **User and Group Selection** dialog box. You can add an Nuance Output Manager user, an LDAP user, or Windows user or group.

Remove button

Removes the selected user or group. Removing the user or group will remove all assigned permissions, but it will not remove the user or group from Output Manager. When you remove a user or group from an object, it will still retain any inherited permission that are assigned to it for an ancestor in the object hierarchy.

Assigned permissions

Lists the permissions that can be assigned to the selected user or group. The type of security being configured determines the permissions that display. To view the permissions, see *User or Group Permissions*.

Select All button

Selects all permissions for the selected user or group.

Unselect All button

Removes all permissions from the selected user or group.

User or Group Permissions

Security Type	Permissions
Output Manager Console	Allow user to run the Output Manager Console
	Allow user to access the Destinations Application
	Allow user to access the Sources Application
	Allow user to access the Documents Application
	Allow user to access the Library Application
	Allow user to access the Reports Application
	Allow user to access the Administration Application

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Security Type	Permissions
	Allow user to access the Message Console
	Allow user to access the Audit Console
	Allow user to view the Output History
	Allow user to execute Ad hoc Rules
	Allow user to manage Ad hoc Rules
	Allow user to edit Business Rules
	Allow user to access Schedule Manager
	Allow user to edit Alert Rules
	Allow user to configure Console Security
	Allow user to configure Security Roles
	Allow user to access the Process Designer
	Allow user to Manage Resources
	Allow user to save Document Queries
	Allow user to Configure Columns
	Allow user to configure desktop client
	Allow user to Configure SNMP
	Allow user to Detect Printers
	Allow user to Manage Billing Accounts
	Allow user to Manage the Nuance Output Manager Lice nse
	Allow user to Manage Users
	Allow user to Manage Windows Queues
	Allow user to Set General Preferences
	Allow user to View Product Components
	Allow user to run the Nuance Output Manager Web Con sole
	Allow user to access the Web Console Release Station
	Allow user to access the Web Console Library
	Allow user to access the Web Console Reports
	Allow user to access the Web Console Document Submi ssion Application
Destination	Allow user to see the Destination

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Security Type	Permissions
	Allow user to print directly to the Destination
	Allow user to enable, disable, pause, initialize, reset, and refresh the Destination
	Allow user to redirect output to another Destination
	Allow user to change the Destination's runtime propertie s
	Allow user to modify the Destination’s configuration
	Allow user to modify the Destination’s security configur ation
	Allow user to remove the Destination
	Allow user to add Destinations (only applies to groups)
	Allow user to add Groups (only applies to groups)
	Allow user to remove the Group (only applies to groups)
Source	Allow user to see the Source
	Allow user to enable and disable the Source
	Allow user to modify the Source’s configuration
	Allow user to modify the Source’s security configuration
	Allow user to remove the Source
	Allow user to add Sources (only applies to groups)
	Allow user to add Groups (only applies to groups)
	Allow user to remove the Group (only applies to groups)
Document folder	Allow user to see Folder
	Allow user to see Document in lists
	Allow user to change Document states
	Allow user to restore Document from Retain
	Allow user to change Document print ranges
	Allow user to view and modify Document property valu es
	Allow user to modify Print Preferences
	Allow user to modify security configuration
	Allow user to view Document contents
	Allow user to delete Documents

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Security Type	Permissions
	Allow user to assign Documents to destinations
	Allow user to schedule Document output
	Allow user to invoke Ad Hoc Rules
	Allow user to add Folders below this Folder
	Allow user to assign Document to a Folder
Library document folder	Allow user to see Library Folder
	Allow user to see Document in lists
	Allow user to modify security configuration
	Allow user to view Document contents
	Allow user to delete Documents
	Allow user to assign Documents to a different Library F older
	Allow user to add Folders below this Library Folder
	Allow user to rename this Library Folder
	Allow user to remove this Library Folder
Report	Allow user to see the Report in the tree
	Allow user to view the Report content
	Allow user to edit the Report
	Allow user to modify the Report security configuration
	Allow user to remove the Report
	Allow user to add Reports (only applies to folders)
	Allow user to add Folders (only applies to folders)
	Allow user to remove the Folder (only applies to folders)

Select Detection Options dialog box

Use this dialog box to configure settings for manually detecting devices through SNMP. Access the dialog box by clicking **Manage Devices** > **Detect now** from the **Administration** application.

Use SNMP detection

Nuance Output Manager uses the SNMP service to search for devices on the network.

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SNMPv1

Nuance Output Manager searches for SNMPv1-enabled devices.

SNMPv3

Nuance Output Manager searches for SNMPv3-enabled devices.

Broadcast

Nuance Output Manager uses a broadcast query to search for devices.

IP Ranges

Nuance Output Manager searches IP address ranges for devices. You can import the ranges from a file, add a single IP address range, or scan a domain for IP address ranges.

Use web (HTTP) detection (requires IP Range configuration)

If you use SNMP detection to query IP ranges, and devices do not respond to the SNMP queries, select this option to query through HTTP as a backup. If Nuance Output Manager detects devices through HTTP, Nuance Output Manager retrieves only the device manufacturer and model.

Import ranges from file button

Adds IP address ranges that are defined in a comma separated values (CSV) file. Verify that the values in the file are formatted as follows:

```
startAddress,endAddress,optionalComment
startAddress,endAddress,optionalComment
startAddress,endAddress,optionalComment
```

The following example shows values from a CSV file:

```
10.16.16.0,10.16.16.255,
10.16.17.0,10.16.17.255,
10.16.18.0,10.16.18.255,My favorite range
10.16.28.0,10.16.28.255,
10.16.30.0,10.16.30.255,
10.16.80.0,10.16.80.255,Common Color range
10.201.4.0,10.201.4.255,
10.201.8.0,10.201.8.255,
10.201.9.0,10.201.9.255,
```

Add single IP range

Use this section to add a single IP address range. Specify the start and end addresses and click **Add**.

Discover domain IP ranges

Use this section to discover IP address ranges in a domain. The current domain appears by default. Network size determines how long it takes Nuance Output Manager to discover IP ranges on a domain. Discovering IP ranges takes longer on a large network.

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Discover button

Change the current domain if necessary and click this button to scan the domain for IP address ranges.

The Status indicator shows the number of computers found in the Active Directory. While the scan is in progress, the indicator shows the approximate remaining scan time. The discovered IP addresses are grouped into ranges of 256 addresses (xxx.xxx.xxx.0 – xxx.xxx.xxx.255).

Select Organizational Units dialog box

Use this dialog box to select Organizational Units (OUs) from the container specified earlier. The utility will list groups or users in these OUs.

Grid

Lists, in tree form, all the OUs in the container you specified. Select check boxes for the OUs that you want to search.

Do not import disabled accounts (User accounts only)

Specifies that you want to exclude disabled user accounts from being imported. This check box is not displayed when you are importing groups.

Select Redirected Destination dialog box

Destinations can be set in a redirect mode. This causes new documents assigned to a destination to be automatically reassigned to a different destination.

For example, you can use this dialog box to configure documents intended for Destination A to be redirected to Destination B. Documents already assigned to Destination A when the redirection occurs, will not be redirected. Documents received for Destination A while the redirection is in affect, will be assigned to Destination B. This includes Destination A being assigned by a source as a document is received, Destination A being assigned during business rule processing, and Destination A being assigned by failover processing. Destination assignments as a result of failover to Destination A will also be redirected to Destination B.

You can access this dialog box by right-clicking a destination in the Destination tree or Destination grid.

Tree

Displays the Destination tree. From the tree, select the destination you want to receive the redirected documents.

Redirect options

Do not redirect printer — Disables destination redirect. Documents are sent to the destination.

Redirect until manually turned off — Enables destination redirect. Documents will be routed to the selected destination until this option is disabled.

Redirect for number of hours — Enables destination redirect for a specified number of hours.

Redirect for number of minutes — Enables destination redirect for a specified number of minutes.

Redirect until — Enables destination redirect until a specific date and time.

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Select User Accounts/Groups to Import dialog box

After you specify the Organizational Unit (OU) to search, use this dialog box to select the groups or users to import.

Grid

Common name column — Specifies the common name (CN) attribute of this group or user.

Email Address column — Specifies the email address of this group or user.

Distinguished Name column — Specifies the DN (distinguished name) of the group or user.

Select All button

Selects all groups or users for import.

Unselect All button

Clears all selected groups or users.

Select User dialog box

During Nuance Output Manager service configuration, use this dialog to specify how the Nuance Output Manager service will log on, as a local system account or a specific account. You can access this dialog box from the **OM services configuration** tab.

Local System Account

Specifies the service will log on as a local system account. Use this option if the Nuance Output Manager DBM Service will communicate with the local SQL database, local Nuance Output Manager services, and local file resources.

This account

Specifies a specific service logon account. Click the browse button (**...**) to select the account.

Password/Confirm Password — Specifies the password for the service logon account.

Send Email dialog box

This dialog box is used when you create business rules, alert rules, or output processes that will send an email message. You will also use this dialog box to configure email notification for the document library. Use this dialog box to configure the email message.

Profile

Selects the email profile that will be used with this rule or output process. You can select a profile from the list or click the Browse button and mange profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles.

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Priority

Determines if the importance level of the email message. You can choose High Importance, Normal Importance, or Low Importance. Normal importance is selected by default.

To

Specifies the email address that will receive notifications. You can enter multiple email addresses separated by a comma. You can also right-click to select Document Properties to use within the address line.

Cc

Specifies email address that will be copied on the notifications. You can enter multiple email addresses separated by a comma. You can also right-click to select Document Properties to use within the address line.

Bcc

Specifies email address that will be blind copied on the notifications. You can enter multiple email addresses separated by a comma. You can also right-click to select Document Properties to use within the address line.

Reply to

Specifies the email address where replies will be routed. You can enter multiple email addresses separated by a comma. You can also right-click to select Document Properties to use within the address line.

Subject

Specifies the subject of the email message. You can also right-click to select Document Properties to use within the subject line.

Digest

Allows you to send the notification messages for multiple events concatenated into one email.

Send Digest — Specifies how often to send the email digest. You can choose from the following options:

- **None** — Does not send an email digest. All notification messages will be sent separately.
- **Every interval** — Sends the digest according to the time interval specified. You will receive a message every interval, even if no alerts were received during the interval.
- **At time interval** — Sends the digest according to the time interval specified. The time interval will start when the first notification messages is received. You will be notified when at least one notification has been received.
- **Every hour** — Sends the digest every hour. You will receive a message every interval, even if no alerts were received during the interval.
- **Every half hour** — Sends the digest every half hour. You will receive a message every interval, even if no alerts were received during the interval.

Interval — Specifies the time interval in minutes.

Max Alerts — Specifies the maximum number of alerts to be included in the digest.

Body

Specifies the text that will appear in the email message. The message can consist of text, one or more document properties, and functions.

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- To insert document properties, right-click in the text box, click **Insert Document Property**, and choose the appropriate properties. The document properties will display enclosed in brackets ([]). The values of the properties will display in the email message.
- To insert functions, right-click in the box, click **Insert Function**, and choose the appropriate function. Review the *Using Nuance Output Manager Functions* help topic for information on configuring functions.

Validate button

Validates the body text.

Set General Preferences Utility

Use this utility to configure general administrative options such as setting the document file store path and the document retention period.

The **Set General Preferences** utility is opened by clicking **Applications** > **Administration** > **Set General Preferences**. Configure options on the following tabs:

Tab	Description
General	Sets general options in the preferences.
Destination	Specifies which print preferences/document properties are supported throughout Nuance Output Manager.
Security	Configures security settings.
Reporting	Configures reporting settings.
Kiosks	Add, Remove and Configure kiosks associated with devices and optional MFP/Kiosk profiles.
Clients	Configures settings for client web servers.

General tab (Set General Preferences Utility)

Sets general options in the preferences.

Option	Description
OM instance name	Changes the Nuance Output Manager instance name. The default name is Nuance Output Manager. The instance name is used with licensing and association with an SQL server.
System notification profile	Set the Notification profile that allows the setting of noti fications for items that affect operation of the system and the administrator would like to be notified when a specif ied event occurs: • Administrative user added • ASA expiration • Business rules modified • Database use exceeds threshold

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Option	Description
	• Destination configuration modified • File store exceeds threshold • General preferences modified • Login failure count exceeded • Output process modified • Profile modified • Resource modified • Source error • Source state changed • Service is down • Source configuration modified • Specific message posted to message log
Retain documents	Select this check box to retain documents globally and s ets period and number for the OM instance. When you e nable the retain feature, documents are saved to the reta in folder after they print or are deleted from the Output Manager Console. If you do not want to save deleted or p rinted documents, disable the retain feature. Documents are retained by default
Default retention period	Specifies the number of days documents will be retained when the **Retain documents** check box is selected. The default period is 7 days.
Maximum retain size	Specifies the maximum amount of documents that can b e retained when the **Retain documents** check box is sele cted. The default value is 100,000 documents. If the maximum value is reached, Nuance Output Manager performs a cleanup routine to remove the oldest documents. This will reduce the document count to match the maximum number of documents.
Refresh external resources	Select this check box to refresh of external resources use d by Nuance Output Manager. External resources are any resource (for example, a CSV file or banner) not stored i n the **Resource Manager**. When this check box is select ed, can specify the **External resource refresh period**, w hich is the number of minutes between refreshes. The de fault setting is 360 minutes. A value of 0 indicates no ref resh.
External resource refresh period	Specifies the time period (in minutes) to reload external r esources used by Nuance Output Manager. The default v alue is 360, and a value of 0 indicates no refresh. This op tion is only available when **Refresh external resources** i s selected.

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Option	Description
Desktop client refresh period	Specifies how often the complete list of billing accounts is passed down to all the clients. If you create new billing accounts, these will not be available until the next refresh . The default value is 1440 minutes.
Desktop client popup timeout	Period in minutes after which popups time out on the clie nt. The default is 30 minutes.
Desktop client communication ports	Set desktop client communication ports ranges. Specifie s a range of port numbers. The default setting is 8100 to 8125.
Auto delete Spooled documents	Enable or disable the automatic deletion of spooled docu ments from the server. If this is enabled, you can set the delete period in hours. The default is 24. Enable this opti on to use green reports that show documents that have be en automatically deleted from the server after being spoo led but never printed.

Document file store path	Lists all configured file stores on this Nuance Output Manager database. The Nuance Output Manager database only stores the properties of a document. The actual files are stored in network folders, called file stores. You can define multiple file stores that will be available for selection from individual sources on the **More settings** tab. The default file store is selected by default.
	• **Location** column — Displays the file store path.
	• **Default** column — Selects the default file store. The default file store will be used when a file store has not been specified. By default sources are configured to use the default file store on the **More settings** tab. If you change the default file store in the grid, all sources using the default will also be updated.
	• **Status** column — Displays the current status for the file store:
	  • In-use — Indicates this Nuance Output Manager database has submitted documents to the file store.
	  • Empty — Indicates no documents have been placed in the file store from this Nuance Output Manager database. The Windows folder could have folders in it from other Nuance Output Manager database activity.
	  • New — Indicates the file store has not been entered into the Nuance Output Manager database. You will need to click **Apply** to add the file store to the database.

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Option	Description
	The command buttons allow you to add, edit, view details for, and remove paths from the table. • **Add** button — Adds a file store. This opens the **Add File Store** dialog box in which you can specify a UNC path (`\\hostname\share`). You can click the browse (**...**) button to create a folder or locate an existing folder. Verify the file store folder does not contain any empty folders. Empty folders in the file store folder will be deleted when the Nuance Output Manager cleanup process runs. **Note:** The Nuance Output Manager DBM service must have any necessary permissions that are required to access the selected network folder. • **Edit** button — Allows you modify the UNC path for the selected file store. This opens the **Edit File Store** dialog box. You cannot edit a file share that with an In-Use status. • **Remove** button — Removes the selected file stores. You can only remove file stores with a New status. • **Details** button — Displays the usage details of the drive where the file store is located. This opens the **File Store Details** dialog box.

Destination tab (Set General Preference Utility)

Specifies which print preferences/document properties are supported throughout Nuance Output Manager.

Option	Description
Printer family definitions	Click the Import button to import an existing PFD (printe r family definition) that contains the settings you want to apply to Nuance Output Manager.
Set destination to unspecified printer family	This option specifies the default printer families on desti nations where the default has not been configured. Click the **Set** button to set default printer families on destinatio ns where default has not been configured.
Global group routing map	This option configures the global group routing ma p with document properties to routing columns. The **Configure** button opens a dialog box that allows the con figuration for mapping of routing columns to document p roperties .
Domains	Use this to configure the default domain to use or to hide a domain.

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You can manually select the print preferences/document properties from the **Configure Document Properties Utility**, which is opened by clicking **Applications** > **Administration** > **Configure Document Properties**. From this utility you can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured.

Note: You can further restrict these options for individual destinations by configuring destination specific capabilities from the **More settings** tab in the configuration dialog box for a destination. (To open the configuration dialog box for destination, right-click a destination in the **Destinations** application and click **Configure**.)

Security tab (Set General Preference Utility)

Configures security settings.

Option	Description
Require strong passwords	Select this check box to enable strong password composition. If this option is enabled, passwords must meet the following requirements: • Minimum of 8 characters • Contain at least 1 upper case alpha character • Contain at least 1 lower case alpha character • Contain at least one number • Contain at least one special character • Not contain the same character more than twice
Password expiration period	Specifies the password expiration period in days. When t he expiration period is reached, you must create a new p assword. Passwords must not be changed more than onc e in a 24-hour period without intervention by a security a dministrator.
Passwords to save in history	Specifies the number of passwords to save in history. Wh en changing passwords, any passwords saved history are not allowed to be reused.
Use automatic account lockout	Select this check box to lock out users who repeatedly tr y but fail to enter the correct password. This can reduce t he risk of unauthorized intrusions by password guessing . Configure the **Lockout threshold** settings to specify th e number of tries in a specified number of minutes that w ill lock out a user. The default is 5 tries within a 5 minut e period.
Automatically unlock account	Select this check box to automatically unlock accounts th at reach the Lockout threshold after the number of minut es specified by **Lockout period**. An administrator will h ave to unlock locked accounts if you do not select this ch eck box. The default period is 15 minutes.
Save auditing information	Saves or discards auditing information in the **Audit Console**. Audit information focuses on security-related a ctions performed by users. Auditing information is saved

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Option	Description
	by default. For a complete list of actions that will be save d, see *Actions Saved in Auditing Information*.
Configure AD/LDAP sync	Click the **Configure** button to open a dialog box to allow the mapping of appropriate Output Manager Properties t o the Active Directory attributes.

External client login	Options in this group configures embedded MFP client u ser logins. Select or clear check boxes to enable or disabl e the following settings:
	• **Allow user name / password** — The user can log in by entering user name, password, and selecting a domain.
	• **Allow card swipe** — The user can log in through a card swipe. The user must also enter a pin if **Require PIN with card swipe** is also selected.
	• **Allow manual card ID entry** — The user can log in by entering an ID. The user must also enter a pin if **Require PIN with manual entry** is also selected.
	• **Allow unmasked card ID** — The card ID will be readable as it is entered. If you clear this check box, the card ID will be masked.
	• **Default manual login method** — Select the default login method users will see. It can be either of the following:
	  • Card ID Entry
	  • User Name/Password
	• **Require PIN with card swipe** — Users must also enter a pin when using a card swipe.
	• **Require PIN with card ID entry** — Users must also enter a pin when using manual card ID entry.

Actions Saved in Auditing Information

This topic lists actions that are saved when the Save auditing information check box is selected in the **Set Preferences Utility** dialog box.

Note: More actions may be added in later versions of this application.

Audit action disabled
Audit action enabled
Console security permission added
Console security permission removed
Destination added
Destination changed
Destination deleted
Destination security parent changed

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Destination security permission added
Destination security permission removed
Document deleted
Document folder changed
Document security parent changed
Document security permission added
Document security permission removed
Document status changed
Document uploaded
Document viewed
Library document deleted
Library document folder changed
Library document status changed
Library document viewed
Library security parent changed
Library security permission added
Library security permission removed
Logon
Query security parent changed
Query security permission added
Query security permission removed
Report security parent changed
Report security permission added
Report security permission removed
Report viewed
Security role permission added
Security role permission removed
Security role user added
Security role user removed
Source added
Source changed
Source deleted
Source security parent changed
Source security permission added
Source security permission removed

Reporting tab (Set General Preference Utility)

Configures reporting settings.

Option	Description
Save accounting information	Select or clear this check box to save or discard accounti ng information. The default setting is to save accounting information.
Maximum message log size	Specifies the maximum entries that will be logged in the Message Console. The default value is 10,000 entries. If

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Option	Description
	the maximum value is reached, Nuance Output Manager performs a cleanup routine to remove the oldest messages. This will reduce the message count to match the maximum number of messages. Use the **Configure** button to adjust the message priority level for logging and the display level for any user that configures logging.
Output history period	Specifies the number of days that will be saved in the **Destination Output History** window. The default period is 1095 days (3 years). The maximum period is 3650 days (10 years) Limiting the amount of data stored in the output history table is particularly important if you are using SQL Server Express, as there is a 4 GB limitation on the data file.
Reporting query timeout	Specifies the reporting query timeout period. Reporting queries by default time out in 30 seconds. If you have a report that is timing out, and you do not mind waiting longer you can increase this timeout period. Generally, a better solution is to determine why the query is taking so long to complete. For example, decreasing the **Output History Period** setting will reduce the number of rows in the output history table and will cause most reports to run faster.
Maximum report size	Specifies the maximum number of records in a report. The default value is 10,000 records.

Kiosks tab (Set General Preference Utility)

Add, Remove and Configure kiosks associated with devices and optional MFP/Kiosk profiles.

Option	Description
Kiosk name	This column shows the name for a kiosk.
Enabled	You can select or clear the check box in this column to enable or disable a kiosk.
Add	Click this button to add a kiosk. This button opens the **Configure Kiosk** dialog box in which you specify the name and associate devices for a new kiosk.
Remove	Click this button to remove the selected kiosk.
Configure	Click this button to or configure the preferences profile the selected kiosk.

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Clients tab (Set General Preference Utility)

Configures settings for client web servers.

Options in this dialog box are grouped in three sections:

- *Unified Client document display limit* on page 648
- *Device Registration Service* on page 648
- *Configuration for client web servers* on page 648

Unified Client document display limit

Option	Description
Client document display limit	Specifies the maximum number of documents that appea r in the list of documents to be released from the device. The list appears on the device panel. Enter a value betwe en 1 and 999. The default value is 40.

Device Registration Service

Option	Description
Device registration server	Specifies the server that runs the device registration servi ce. Specify the localhost if it is run on the same machine as Output Manager.
Services port	The port used by the services.
Web client port	The port used by the web client.
Use SSL	Specifies to use SSL to communicate with web clients.
Launch Device Registration Client	Launches the Device Registration Client.

Configuration for client web servers

Option	Description
Client web server	Select the client web server to configure in this box.
Server host	Specifies the host for the selected client web server.
Application directory	Specifies the relative path to the application directory on the web server.
Server port	The server port can be configured unless the port is using SSL configured on the **SSL Certification Manager** tab i n the **Output Manager Server Configuration Utility**.
Virtual root	Specifies the relative path to the virtual root directory fo r the web server.
Application Open API port	Enter the port number on which the Open API service wi ll be running. The default is 13351.

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Option	Description
	An Output Manager device registration requires the OpenAPI port setting to be configured. If the device has problems communicating, ensure the port setting configured here matches the value that is set for the device through Device Registration Service. Also ensure there is no firewall software or hardware blocking the specified port and that IP-routing has been set up to allow communication on this port.
Authority Open API port	Enter the port number through which Open API user aut hentication and authorization requests are handled. The d efault is 13353.

Groups for user based licensing

These settings license usage for all users in a specified group.

Option	Description
Printing	Specifies group licensing for printing.
Scanning	Specifies group licensing for scanning.
Mobile	Specifies group licensing for mobile.

Set Priority in Group dialog box

Use this dialog box to configure the **Set Priority in Group** Ad Hoc rule action. The settings define how to arrange the order of documents in a package (group) based on document property values.

You can access the dialog box when configuring an Ad Hoc rule using the **Ad Hoc Rules Manager**. You can also access the dialog box by right-clicking on a document and selecting **Run AdHoc Action** > **Set Priority In Group**, which re-orders the documents in an existing package.

Ordering properties

Specifies the document properties that control the document order in the package. Expand the sections and select the document properties.

Selected order

Shows the order of the selected properties.

Move up button

Moves a property up in the order.

Move down button

Moves a property down in the order.

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SNMP Server Configuration dialog box

Use this dialog box to configure an Output Manager SNMP Service installation in the **Manage Devices Utility**. You can determine the SNMP detection method and determine how frequently to update SNMP metering, dynamic values, and static values.

The following limitations apply when specifying date and time values in fields on the dialog box:

- The format for date and time fields is *dd.hh*:*mm*:*ss* (*days.hours*:*minutes*:*seconds*).
- Date and time fields do not accept values that are not valid.

  For example, you cannot specify more than 14 days, more than 23 hours, more than 59 minutes, or more than 59 seconds.
- The maximum value in a date and time field is 14 days (14.00:00:00).

  If you set the *days* value to 14, you cannot enter hours, minutes or seconds, as doing so would create a period longer than 14 days.

  Tip: To specify hours, minutes, or seconds, set *days* to a value that is less than 14.

Default IP detection Ranges

Click **Configure ranges** to define the IP address ranges that Nuance Output Manager searches when automatically detecting devices on the network.

Autodetection

Option	Description
Auto-detection period	Specifies the interval Nuance Output Manager uses to automatically search the network for new devices. For example, if you type `00.04:00:00`, Nuance Output Manager searches the network every four hours.
Use SNMP detection	Nuance Output Manager uses the SNMP service to search for devices on the network.
SNMPv1	Nuance Output Manager searches for SNMPv1-enabled devices.
SNMPv3	Nuance Output Manager searches for SNMPv3-enabled devices.
Broadcast	Nuance Output Manager uses a broadcast query to search for devices.
IP Range(s)	Nuance Output Manager searches ranges of IP addresses for devices. Click **Configure ranges** to define the IP address ranges.

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Option	Description
Use web (HTTP) detection (requires IP Range configuration)	If you use SNMP detection to query IP ranges, and devices do not respond to the SNMP queries, select this option to query through HTTP as a backup. If Nuance Output Manager detects devices through HTTP, Nuance Output Manager retrieves only the device manufacturer and model.

SNMP update and meter parameters

Option	Description
Use DNS printer names if available	Specifies if you want to use the Domain Name System (DNS) instead of the IP address when communicating with a printer.
Default community name	Specifies the community name for communication through SNMPv1 or SNMP2 during device detection. Nuance Output Manager uses `public` as the default community name. If you change the Nuance Output Manager default community name, update SNMPv1- or SNMP2-enabled devices to use the new community name.
Default SNMP version	Specifies the SNMP version. You can choose Auto, SNMPv1, SNMPv2c, or SNMPv3. The default is SNMPv2c. Nuance Output Manager dynamically determines the actual SNMP version used to communicate with the device as follows: • If the default version is SNMPv1, SNMPv2c, or SNMPv3 and the specific device supports that version, the SNMP service uses the selected default version. • If the default version is set to **Auto** or the device does not support the selected default version, the SNMP service uses the highest version supported by the device. • If the default version is SNMPv3, the SNMP service checks for SNMPv3 security settings. If the services does not find security settings, the service uses the next highest version supported by the device (SNMPv2c or SNMPv1).
Allow SNMPv1/v2c queries	Specifies if Nuance Output Manager queries the network for SNMPv1- and SNMPv2c-enabled devices. Selecting

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Option	Description
	this option and **Allow SNMPv3 queries** increases the time it takes Nuance Output Manager to detect devices.
Allow SNMPv3 queries	Specifies if Nuance Output Manager queries the network for SNMPv3-enabled devices. Selecting this option and **Allow SNMPv1/v2c queries** increases the time it takes Nuance Output Manager to detect devices.

SNMP metering

SNMP metering periodically gathers information from a device about how many copies, prints, faxes, scans, and so on, have been made and saves the data. It is not by user, just overall counts for the device. You can run SNMP Meter History reports on the data in the Reports application. SNMP metering is only available for certain devices.

Option	Description
Update metering values	Specifies if you want to automatically update metering v alues.
SNMP metering period	Specifies how often you want to automatically perform S NMP metering. The default period is one day (`01.00:0 0:00`).
SNMP metering timeout	Specifies the amount of time Nuance Output Manager w aits for a response from the device. The default is 3600 s econds. If the device does not respond after 3600 second s, Nuance Output Manager sends the next update reques t according to the SNMP metering period that you specif ied.

Static update

Static values are values that do not change or change very infrequently, such as the printers name and IP address.

Option	Description
Update static values	Specifies if you want to automatically update static valu es.
Static update period	Specifies how often you want to automatically update de stinations. By default the static update frequency is set to 7 days (`07.00:00:00`).
Static update timeout	Specifies the amount of time in seconds Nuance Output Manager waits for a response from the device. The def ault is 0, meaning there is no timeout. If the device doe s not respond after the timeout period, Nuance Output Manager sends the next update request according to the s tatic update period that you specified.

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Dynamic update

Dynamic values are values that can change while the printer is being used, such as out of paper and low on toner. In most cases, dynamic values should be configured to update more frequently than static values. Dynamic value updates are needed to maintain timely alerts so the printer can stay operational.

Option	Description
Update dynamic values	Specifies if you want to automatically update dynamic v alues.
Dynamic update period	Specifies how often you want to automatically update de stinations. By default the dynamic update frequency is se t to five minutes (`00:00:05:00`).
Dynamic update timeout	Specifies the time in seconds Nuance Output Manager w aits for a response from the device. The default is 0, mea ning there is no timeout. If the device does not respond a fter the timeout period, Nuance Output Manager sends th e next update request according to the dynamic update pe riod that you specified.

Alert Monitor

By default, the Alert Monitor polls the DBM service every 60 seconds for devices in an alert condition and queries them through SNMP for updated status information. The monitor sends query results back to the DBM service. The monitor collects status information separately to provide more frequent updates to devices that are in an alert status for prompt delivery to the Nuance Output Manager Console. You can increase the interval to reduce network traffic.

Option	Description
Allow alert checks	Select to enable the monitor feature for custom polling i ntervals.
Check current alerts every <*interval*> minutes	Specifies the interval after which the monitor polls the D BM service and queries devices for updated status infor mation.

Global SNMPv3 settings

Nuance Output Manager supports SNMP version 3 (SNMPv3) for increased security when communicating with devices. You can configure Nuance Output Manager and devices to communicate through SNMPv3 with matching global security settings as described in the following table:

Option	Description
User	Specifies the user name that Nuance Output Manager use s to communicate with SNMPv3-enabled devices.
Authentication Password	Specifies the password that Nuance Output Manager use s to authenticate devices.
Protocol	Specifies the protocol for authenticating devices.

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Option	Description
Encryption password	An optional setting for specifying a password to encrypt data exchanged between Nuance Output Manager and de vices.
Algorithm	Specifies the protocol that Nuance Output Manager uses to encrypt data. Data encryption is optional. If you encrypt data, verify that the encryption values in Nuance Output Manager match the SNMPv3 settings on the devices.
Remote engine context name	Specifies the name of a specific context for SNMPv3 communication between Nuance Output Manager and SNMPv3-enabled devices. Not all devices require a context name to communicate through SNMPv3. If Nuance Output Manager cannot communicate with a device using the context name, Nuance Output Manager does not use the context name on subsequent attempts to communicate with the device. Not all devices display the engine context name in their configuration pages. Some devices do not communicate with SNMP v3 if the engine context name is not specified.

If you want Nuance Output Manager to communicate with a device with different SNMPv3 settings, you can override the global SNMP settings for the device.

Source Properties Profile dialog box

Use this dialog box to configure the source properties profiles that are available to AutoStore, Windows queues, and Web Upload sources.

Source properties profiles contain the print preferences/document properties that are supported by a specific source. You can also select the settings that are allowed for a particular property. These settings determine what is available to the user in the dialogs where properties are configured for this source.

Name

Specifies the profile name.

Description

Specifies a description of the profile.

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Print preferences

Lists the print preferences/document properties that are available for this source. They are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow.

Under each category are the document properties that belong to that group. In each group, you can determine the properties that are supported by this source. Select the check boxes for properties you want to be available for configuration. Clear the check boxes for properties you do not want to be available.

If a property is configured by selecting from a list of options, those options will display beneath the property. You can select and clear the check boxes to determine the choices that will be available when those properties are configured for this source.

Source Configuration dialog box

Use this dialog box to configure sources.

Create a source by right-clicking a folder in the **Sources** application and clicking **New Source** on the shortcut menu.

Options

Option	Description
Name	Specifies the name of the source.
Server	Specifies the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source. The source does not have to be on the same serve r as the Nuance Output Manager Input Service.
Comments	Lists any general comments about the source.
Location	Specifies any specific location information for the sourc e.
Select Image	Displays an email source image. To change the source i mage, click **Select Image** and choose the appropriate im age file (BMP, JPEG, or PNG). The selected image will be compressed and scaled to 96x96 pixels. Changing this image will not change the smaller image that displays or the image that displays in the source tree. To change the i mage back to the default, click **Reset Image**.

General tabs

The following tabs provide general settings for any type of source.

Tab	Description
Document Properties tab (Source Configuration) on page 657	Settings on this tab configure document properties that will be applied to all documents received by this source.
Filters tab on page 662	Use this tab to configure filters for the selected source.

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Tab	Description
More Settings tab (Source Configuration) on page 666	Use this tab to configure common configuration options that available to all source types. You can access this tab when you create or configure a source.
Output Settings tab (Source Configuration) on page 667	Use this tab to configure output options that available to all source types. You can access this tab when you create or configure a source.

Source specific tabs

The following tabs provide settings for specific types of sources.

Icon	Source	Description
	AutoStore Settings tab (Source Configuration) on page 657	Configure settings on this tab for an AutoStore source.
	Email settings tab (Source Configuration) on page 659	Use this tab to configure an email source.
	FTP Settings tab (Source Configuration) on page 662	Use this tab to configure an FTP source.
	IPP Settings tab (Source Configuration) on page 664	Use this tab to configure an IPP (Internet Printing Protocol) source. You can access this tab when you create or configure an IPP source.
	LPD Settings tab (Source Configuration) on page 665	Use this tab to configure an LPD source.
	OM source (no source specific settin gs)	
	NetWeaver source (no source specifi c settings)	
	PRISMAProduction settings tab (Destination Configuration) on page 508	Use settings on this tab to configure a PRISMAProduction destination for an Océ PRISMAproduction server.
	Folder Settings tab on page 663	Use this tab to configure a network folder source.
	Output Manger source (no source spe cific settings)	
	Socket settings tab (Sources) on page 668	Use this tab to configure a socket source.
	WCF API source (no source specific settings)	

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Icon	Source	Description
	Web Upload Settings tab (Source Configuration) on page 669	Use this tab to configure a Web upload source.
	WebSphere MQ settings tab (Source) on page 670	Use this tab to configure a WebSphere MQ source.
	Windows Queue Settings tab (Source Configuration) on page 670	Use settings on this tab to configure a Windows queue source.

AutoStore Settings tab (Source Configuration)

Configure settings on this tab for an AutoStore source.

Option	Description
Source capabilities profile	Specifies the capabilities profile for an AutoStore source. Select a capabilities profile or click the browse button **...** to create or edit a source properties profile. A source properties profile specifies print preferences and settings that will be available to a source. You can select a profile for an AutoStore source, or the Default profile, or All Capabilities. The All Capabilities option selects to make all print preferences and settings available to the source.

Document Properties tab (Source Configuration)

Settings on this tab configure document properties that will be applied to all documents received by this source.

Option	Description
Use advanced document properties	Enables the use of advanced document properties. Advanced document properties facilitate the setting of document properties from multiple sources. Document properties can be set from Output Manager Print Server headers, LPD headers, job tickets, data contained in the document, or fixed values, and so on. Advanced document properties is a complex feature that only advanced users and professional service engineers should configure. Use the **Advanced document properties** check box to enable or disable the feature. Use the drop-down list to select the default document properties profile or an existing profile. • New — Displays the **Document Properties Profile** dialog box for creating a new document properties profile. • Edit — Displays the selected profile for modification.

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Option	Description
	• Manage — Displays the **Manage Document Properties Profiles** dialog box, which lists all of the defined document properties profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.
Document owner	Specifies the Nuance Output Manager user that will be the owner of all documents received using this source. Click the browse button (**...**) to select a user.

Document properties grid

Entries in this grid specify document property values. Modify the properties directly in the **Mode** and **Value** columns.

Column	Description
Document Property	Lists the property values that can be configured. The properties are grouped into the following categories: Basic options, Media selection, Document, Image adjustments, Finishing, and Other properties. To expand a category, click the down arrow next to a category name. To collapse a category, click the up arrow. Under each category are the print preferences/document properties that belong to that group. The first node level in the categories determine the print preferences for the properties it contains. On the print preference node, you select how the property should be applied when a document is sent to a destination. Under each print preference are the parameters needed to generate that print preference. **Note:** The document properties that display are controlled using the **Configure Document Properties Utility**.
Mode	Specifies how to apply the property value. Click in the cell and choose one of the following options: • Always Apply — Always applies the specified property value. Nuance Output Manager will add commands to the print stream to enforce the print preference. If the document already contains commands for that print preference, Nuance Output Manager will modify the commands to work with the printer family where the document is being sent. • Informational Only — Nuance Output Manager makes no changes to the print stream when the document is sent to the destination. The value is for informational purposes only.

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Column	Description
Value	Specifies the document property value. Click directly in the cell to change the value.

Email settings tab (Source Configuration)

Use this tab to configure an email source.

Documents received by the specified email account will be routed to Nuance Output Manager. You can access this tab when you create or configure an email source.

Email settings

Option	Description
Protocol	Select POP3 to use a Post Office Protocol connection between the Output Manager server and the email server. Select IMAP4 to use an Internet Message Access Protocol connection.
Email server	Enter a valid mail exchange server. You can also click the browse button (**...**) to display the **Mail Server Search** dialog box and search for an email server on a given domain. • POP3 — Specifies to use the POP3 protocol to access the email server. • IMAP4 — Specifies to use the IMAP4 protocol to access the email server. • Exchange Web Services — Use Exchange Web Services (EWS) to access the email server. EWS must be active on the email server to support this option.
Port	Specifies the port number for the selected protocol. The following table lists common port assignments for the protocols that Output Manager supports: Protocol / Port POP3 / 110 POP3 (SSL enabled) / 995 IMAP4 / 143 IMAP4 (SSL enabled) / 993 EWS / 443/TCP (HTTPS) The port number for your environment may vary. Refer to an email server administrator for more information.

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Option	Description
	Note: This setting is unavailable and the port number is configured by the application when Exchange Web Services is selected for **Email server**.
EWS connection	Select the option to use to discover and connect to the Ex change server when Exchange Web Services is selected f or **Protocol**: • **Autodiscover via email address** — Specify an email address. • **Service URI** — Specify the service URI (such as mail.domain.com).
Use SSL	Select to use SSL (Secure Sockets Layer) to encrypt the connection between the email server and Output Manager.
User name	Specifies the user name that will be used when logging in to the email account. If the email account does not require a user name, you can leave this box blank.
Password/Confirm Password	Specifies the user password that will be used when logging in to the email account. If the email account does not require a password, you can leave these boxes blank.
Interval	Specifies the time interval for checking the email account for documents. The default value is 60 seconds.
Delete messages	Deletes the email messages and their attachments from the email server once they have been received into Nuance Output Manager. This option is selected by default.
Include the following email components in a secondary document	Select the email components to include in a separate components document that users can print. When Nuance Output Manager receives an email, Nuance Output Manager resolves its attachments into documents and creates the components document. Nuance Output Manager then creates a single package that contains all the documents from the email, the attachments, and the components document.

Epic Settings tab (Source Configuration)

Use this tab to configure an Epic health information source.

Epic documents located in a specified folder will be routed to Nuance Output Manager. You can access this tab when you create or configure an Epic source.

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Option	Description
Folder	Specifies the path of the network folder to be monitored. For the selected folder, you must configure the Nuance Output Manager services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. Right-click the folder in Windows Explorer and click **Sharing and Security** to configure these options.
Scan subfolders	Select the check box to monitor subfolders within specif ied network folder.
Interval	Specifies how often to check the selected folder for files. The default time interval is 10 seconds.
Order	Specifies the order in which Nuance Output Manager rec eives files from the network folder.
Disposition	Specifies what happens to a file in the network folder aft er it is sent to Nuance Output Manager. • Delete — Deletes the original file after sending it to the Nuance Output Manager. This option is selected by default. • Leave — Does not delete or move the original file after it is sent Nuance Output Manager. This causes the file to be sent repeatedly (once each polling **Interval**) until you delete it. • Move — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the new file will be saved with an incrementing number. For example, if file ABC is sent to a folder that already contains a file named ABC, the new file will be saved as ABC_001. Enter the folder path in the Move to box. • Move/Overwrite — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the existing file will be replaced by the new file. Enter the folder path in the **Move to** box.
Move to	Specifies the path for the folder to which documents a re moved when **Move** or **Move/Overwrite** is selecte d for **Disposition**. This option is available only when **Disposition** is set to Move or to Move/Overwrite.
EPS binaries	The path of the EPS (Epic Print Service) binaries folder. An example, for a default installation, would be `C:\Epi c\bin\8.1\Epic Print Service`.

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Option	Description
EPS incoming	The path of the EPS watch folder. An example for a defa ult installation would be `C:\Epic\Jobs\Incoming \8.1\Epic Print Service`. Output Manager will monitor the configured watch **Folder**. Any unrecognized file will be moved it to this folder for EPS handle. Outpu t Manager currently supports `.ERTF` files and `.ERAW` fil es. Other file types will be moved to this folder.
Convert ERTF To PDF	Select this check box to convert Epic ERTF formatted fi les to PDF.
Delete files not intended for print	Select this check box to delete ERTF files that specify in document header specifies that a document is not to be p rinted.

Filters tab

Use this tab to configure filters for the selected source.

Filters restrict documents from the source by including or excluding certain groups.

The **Filters** tab is only available when configuring email, network folder, and LPD sources.

Filter grid

Allows you to restrict documents from a source by including or excluding certain groups.

The **Filter** column lists the filter criteria, specific to the selected source type. You can modify the filter values by typing directly in the **Regular Expression Value** column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.

Show tags

Shows or hides a **Tag** column in the grid.

Show descriptions

Shows or hides a **Description** column in the grid.

Regular Expression Tester

Verifies the expression syntax is valid.

FTP Settings tab (Source Configuration)

Use this tab to configure an FTP source.

Documents received by this source will be routed to Nuance Output Manager. You can access this tab when you create or configure an FTP source.

FTP server — Specifies the FTP server, which can be an FTP or IP address.

Port — Specifies the host's port number. The port number must be from 1 through 65536. The default value is 21.

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Use passive mode — Determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will specify active mode, where the host creates a separate or new session to transfer data in response to a request from the client.

User name — Specifies the user name that will be used when logging on to the server. If the server does not require a user name, you can leave this box blank.

Password/Confirm Password — Specifies the user password that will be used when logging on to the server. If the server does not require a password, you can leave these boxes blank.

FTP folder — Specifies the location on the host from which the files will be retrieved when receiving files. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at `\FTP\UserName`, you can specify either `\FTP\UserName\MySourceFiles` or `\MySourceFiles`).

Scan subfolders — Determines if you want to scan any subfolders of the specified FTP folder.

Remove subfolders — Determines if you want to delete the subfolders of the FTP folder, after the files are transferred into Nuance Output Manager.

Interval — Specifies the time interval for checking the host for documents. The default value is 60 seconds.

Temp folder — Specifies the location files are transferred into during the FTP session. When the session is complete they are put in the file store.

Folder Settings tab

Use this tab to configure a network folder source.

Documents received by this source will be routed to Nuance Output Manager. You can access this tab when you create or configure a network folder source.

Option	Description
Folder	Specifies the path of the network folder to be monitored. For the selected folder, you must configure the Nuance Output Manager services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. Right-click the folder in Windows Explorer and click **Sharing and Security** to configure these options.
Scan subfolders	Select this check box to monitor subfolders within the sp ecified network folder.
Interval	Specifies how often to check the selected folder for files. The default time interval is 10 seconds.
Order	Specifies the order in which Nuance Output Manager rec eives files from the network folder.
Disposition	Specifies what happens to a file in the network folder aft er it is sent to Nuance Output Manager.

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Option	Description
	• Delete — Deletes the original file after sending it to the Nuance Output Manager. This option is selected by default. • Leave — Does not delete or move the original file after it is sent Nuance Output Manager. This causes the file to be sent repeatedly (once each polling **Interval**) until you delete it. • Move — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the new file will be saved with an incrementing number. For example, if file ABC is sent to a folder that already contains a file named ABC, the new file will be saved as ABC_001. • Move/Overwrite — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the existing file will be replaced by the new file.
Move to	Specifies the path for the folder to which documents a re moved when **Move** or **Move/Overwrite** is selecte d for **Disposition**. This option is available only when **Disposition** is set to Move or to Move/Overwrite.

IPP Settings tab (Source Configuration)

Use this tab to configure an IPP (Internet Printing Protocol) source. You can access this tab when you create or configure an IPP source.

The settings on this tab configure the URL that is used to communicate with an IPP printer. The URL is formed as follows:

`http://ipaddress:port/instancename`

Make sure that the network and firewall are configured to allow incoming traffic to the specified IP address and port number.

Option	Description
IP address	Specifies the IP address for the IPP printer.
Enable SSL	Select this check box to use SSL to communicate with th e printer.
Port	Specifies the port that the server uses to communicate wi th the printer. The default port setting is 631.
Instance name	Specifies the instance name for the printer.

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LPD Settings tab (Source Configuration)

Use this tab to configure an LPD source.

Documents received by this source will be routed to Nuance Output Manager. You can access this tab when you create or configure an LPD source.

Port — Specifies the host's port number. The default value is 515.

IP address — Specifies the host's IP address. Click the Browse button to select one of the available connections, or enter the IP address directly in the box.

Temp folder — Specifies the location files are transferred into during the LPD session. When the session is complete they are put in the file store.

LPD queues — Lists all defined LPD queues. Select the check boxes in the **Enabled** column to enable/disable the LPD queues.

- **Add button** — Adds an LPD queue using the **Add Queue Subdevice** tab pages. You will need to configure the options on the **LPD queue settings** tab.
- **Modify button** — Modifies the selected LPD queue.
- **Remove button** — Removes the selected LPD queue.

Default queue — Selects the default queue which will process all requests made to unrecognized queues. All defined LPD queues are listed.

LPD Queue Settings tab

Use this tab to configure an LPD queue. You can access this tab when you add or modify an LPD queue from the **LPD settings** tab.

Queue name

Specifies the LPD queue name. The underscore character is not allowed to be part of the queue name.

Enabled

Determines if the queue is available to receive documents.

Allow restart

Accepts or rejects the restart command, to reset a particular queue.

Allow LPQ

Determines if the LPQ command line can be used to view the print queue for your current logon name.

Allow LPRM

Determines if the LPRM command line can be used to remove files in the print queue that were submitted under your current logon name.

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More Settings tab (Source Configuration)

Use this tab to configure common configuration options that available to all source types. You can access this tab when you create or configure a source.

When documents arrive

Set state to hold — Sets all documents received by this source to the Hold state as they enter the Output Manager Console. This option is disabled by default.

Do not process business rules — Disables business rule processing for all documents received by this source as they enter the Output Manager Console. This option is disabled by default.

Analyze documents

Use quick page counting for PDF documents — Enables optimized page counting for PDF jobs. When this option is enabled, the **Count pages**, **Detect color**, **Detect data type**, **Detect duplex**, and **Detect trays** options are disabled.

Count pages — Performs a page count on all documents received by this source as they enter the Output Manager Console. Selecting this option may cause performance degradation. This option is disabled by default.

Detect data type — Detects the document data type and displays it in the Documents grid **Data Type** column.

Detect trays — Detects the document paper tray that will print the document and displays it in the Documents grid **Input Bin** or **Output Bin** column. You can use the **Configure Document Properties Utility** to display the **Output Bin** column.

Detect color — Detects if the document contains color. The Documents grid **Color** column displays True or False depending if color is detected.

Detect duplex — Detects if the document is configured for duplex printing. The Documents grid **Duplex** column displays how the document will print, One Sided, Two Sided Short Edge, or Two Sided Long Edge.

Set file store

Sets a file store for all documents received by this source as they enter the Output Manager Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.

Set document folder

Assigns a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is Un-Filed Documents.

Use advanced costing

Determines if you want to use **Advanced Costing Profiles**, where you can enter more specific costs associated with printing. If you do not select this option, you can specify only the cost per page for printing.

- **Set cost per page** — Sets the printing cost per page for black and white and color documents. Use the spin boxes to select the printing cost.

If you want to bill less than 1 cent per page, you must change the Windows currency settings to display more than 2 decimal places. To do this, open **Control Panel** and click **Region and Language**. On the **Formats** tab, click **Additional settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.

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- **Advanced costing profile** — Specifies the **Advanced Costing Profile** that will be associated with the source. You can select one of the existing profiles from the list, or click **New** to create a new profile on the **Advanced Costing Profile** dialog box. These options are only available if **Use advanced costing** is selected.

Assign notifications profile

Allows for sending a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or a pop-up. Notification profiles are used to send notifications. You can use the list to select an existing notification profile or click **New** to create one.

New — Create a new notifications profile. Opens the **Notification Profile** dialog box.

Edit — Displays the selected notifications profile properties for modification.

Manage — Opens the **Manage Notification Profiles** dialog box which lists all of the defined notifications profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Output Settings tab (Source Configuration)

Use this tab to configure output options that available to all source types. You can access this tab when you create or configure a source.

Schedule output

Schedules all documents received by this source to print at your selected date and time. From the list, you can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.

Route to destination

Specifies a destination where all documents received by this source can be routed. Click the browse button (**...**) to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.

Set retention period

Allows for overriding the default retain settings for all documents received by this source. To override the default settings, select the **Override default retain settings** check box and configure the retain options as necessary.

Set auto delete Spooled documents

Allows for overriding the default automatic deletion settings for all spooled documents received by this source. To override the default settings, select the **Override default auto delete settings** check box and configure the options as necessary.

Assign output process

Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on.

Use the list to select an existing output process.

New — Displays the **Process Designer** for creating an output process. The visual flowchart style designer makes it easy and intuitive to create complex, powerful processes.

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Edit — Displays the selected output process properties for modification.

Manage — Displays the **Manage Output Process Profiles** dialog box, which lists all of the defined output processes. In this dialog box you can create, import, and export processes, as well as manage all existing processes.

Assign failover profile

Failover profiles specify what should happen to documents when they are sent to inaccessible destinations (they aren't able to receive documents).

Use the list to select an existing failover profile.

New — Displays the **Failover Profile** dialog box for creating a new failover profile. You can determine what should happen if all of the retries fail and when to place the document in an error state.

Edit — Displays the selected failover profile properties for modification.

Manage — Displays the **Manage Failover Profiles** dialog box which lists all of the defined failover profiles. From this dialog box you can create, import, and export profiles, as well as manage all existing profiles.

Socket settings tab (Sources)

Use this tab to configure a socket source.

Documents received by the IP address and port specified will be received into Nuance Output Manager. You can access this tab when you create or configure a socket source.

Port — Specifies the port number. The default number is 9100.

IP address — Specifies the IP address on the local system where the socket device will receive documents. In most cases, this can be left blank, as most systems only have one IP address. For systems with multiple adapters or if multiple IP addresses are supported (that is, when using a VPN), this specifies the IP address for the appropriate port.

Click the browse button (**...**) to select one of the available connections, or enter the IP address directly in the box.

Support PJL status readback — Enables the socket source to emulate two way printer communications. The print job sender can send PJL commands that prompt a printer to respond with status information, and if it expects a response, it may wait until that response arrives before continuing with the job.

TCP/IP NJE settings tab (Source Configuration)

Use this dialog box to configure the settings for receiving data from a mainframe computer.

Option	Description
Host node name	The mainframe node name. The name identifies the node in the NJE network.
Host type	The mainframe operating system component that receive s jobs, schedules them for processing, and controls their output processing. Nuance Output Manager supports JES 2, JES3, and VSE/Power.
Host password	The password required to connect to the host node.
Confirm password	Password confirmation.

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Option	Description
Host codepage	Specifies the table of values that define the encoding for data on the mainframe.
IP address	The TCP/IP address used to connect to the mainframe.
Port	The TCP/IP port to used to connect to the mainframe.
Local node name	The node name defined on the mainframe for the Nuance Output Manager source. Multiple Nuance Output Manager sources (nodes) can connect to the same mainf rame.
Connect interval (in minutes)	Specifies the intervals Nuance Output Manager uses to c onnect to the mainframe to receive data.
Local password	The password required to connect to the Nuance Output Manager source node.
Confirm password	Password confirmation.
Local codepage	Specifies the table of values that define the encoding for data received in Nuance Output Manager.
SYSIN receivers	The number of SYSIN receivers (JRNUM) in the mainfr ame node definition for the Nuance Output Manager sour ce. This value must match the number of SYSIN transmit ters (JTNUM) in the mainframe node definition.
SYSOUT receivers	The number of SYSOUT receivers (SRNUM) in the mai nframe node definition for the Nuance Output Manager s ource. This value must match the number of SYSOUT tr ansmitters (STNUM) in the mainframe node definition.
Multiple streams per buffer	Indicates that the mainframe is configured to send data f or multiple streams within the same network buffer.
Multiple headers per buffer	Indicates that the mainframe is configured to send heade rs for multiple transmissions within the same network bu ffer.
Package by output group	Indicates that datasets in a multi-dataset job are grouped together in Nuance Output Manager packages based on n ormal output group properties. Datasets in the same job with the same form and class are packaged together.

Web Upload Settings tab (Source Configuration)

Use this tab to configure a Web upload source.

Documents received by this source will be routed to Nuance Output Manager.

Web Server — Specifies the web server for this source. The list is populated with the web servers available to the selected server.

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Source capabilities profile — Specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or click the browse button (**...**) to create and manage profiles from the **Manage Source Properties Profiles** dialog box.

WebSphere MQ settings tab (Source)

Use this tab to configure a WebSphere MQ source.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

This source will receive WebSphere MQ messages. You can access this tab when you create or configure a WebSphere MQ source.

Important: To use this destination, you must install a WebSphere MQ client separately.

Queue manager — Specifies the name of the queue manager. This must match the queue manager specified in WebSphere MQ. The queue manager administers the queues that have been created on it (these are known as local queues).

Queue name — Specifies the queue name where messages received by this source will be stored. This must match the queue name specified in WebSphere MQ. The queue name along with the name of its queue manager, provides a unique address where messages can be received.

Channel name — Each WebSphere MQ queue manager has different types of connectivity options. Since Nuance Output Manager uses TCPIP for the channel connection, you must specify the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.

Warning: Make sure the SSL certificate required option is not selected in WebSphere MQ. Nuance Output Manager does not support this at this time.

Connection name — Specifies the connection name. The connection name is the IP address and (port) or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue.

Windows Queue Settings tab (Source Configuration)

Use settings on this tab to configure a Windows queue source.

You can access this tab when you create or configure a Windows queue source.

Converted queue — Lists the Windows printers that are using the Output Manager Port Monitor, but have not had a Source created and associated with it. Once a Source has been created and associated, those printers will be removed from the list.

Source capabilities profile — Specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or click the browse button (**...**) to create and manage profiles from the **Manage Source Properties Profiles** dialog box.

Source Configuration (bulk settings) dialog box

Use bulk source settings to simultaneously configure multiple devices with the same source settings.

Create a source by right-clicking a folder in the **Sources** application and clicking **New Source** on the shortcut menu.

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General settings

Click an option you want to learn more about.

Tab	Description
Document Properties tab (Source Bulk Configuration) on page 672	Use the **Document properties** tab to configure document properties that will be applied to all documents received by this source.
Filters tab (Source Bulk Configuration) on page 675	Use this tab to configure filters for sources.
More Settings tab (Source Bulk Configuration) on page 678	Use this tab to configure common configuration options that available to all source types.
Output Settings tab (Source Bulk Configuration) on page 679	Use this tab to configure output options that available to all source types.

Buttons

Button	Description
Select all	Selects the check boxes for all of the listed sources.
Unselect all	Clears check boxes for any selected sources.
Add	Adds a source to the grid. A new row will appear at the b ottom of the grid.
Copy	Creates a copy of each of the selected source in the grid. New rows are added at the bottom of the grid.
Remove	Deletes selected sources.
Series Fill	Fills multiple selected fields in a column with the specified text and counter. This option is useful when you have several sources using similar naming conventions (such as source name, folder, and location). To create a series fill, select the rows you want to automatically fill and then click inside one of the cells that you are editing. Click **Series Fill** and enter the text and configure the counter in the **Series Fill** dialog box. The series will start with the first selected row.

Source specific settings tabs

Settings tabs show for specific source sources. Click below to learn more about these settings.

Icon	Source	
	Email source settings	Use this tab to simultaneously create multiple email sources.
	FTP settings	Use this tab to simultaneously configure multiple FTP sources.

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Icon	Source	
		Documents received by this source will be routed to Nuance Output Manager.
	IPP source settings	Use this tab to simultaneously configure multiple IPP (Internet Printing Protocol) sources. You can access this tab when you create multiple IPP sources.
	LPD source settings	Use this tab to simultaneously create multiple LPD sources.
	NetWeaver source (no source specifi c settings)	
	Folder source settings	Use this tab to simultaneously create multiple network folder sources.
	Output Manager source (no source sp ecific settings)	
	Socket source settings	Use this tab to simultaneously create multiple socket sources.
	WCF API source (no source specific settings)	
	Web Upload source settings	Use this tab to simultaneously create multiple Web upload sources.
	WebSphere MQ source settings	Use this tab to simultaneously create multiple WebSphere MQ sources. This source will receive WebSphere MQ messages.
	Windows Queue source settings	Use this tab to simultaneously create multiple Windows queue sources.

Document Properties tab (Source Bulk Configuration)

Use the **Document properties** tab to configure document properties that will be applied to all documents received by this source.

You will use this tab when simultaneously creating multiple sources.

Click directly in the grid to configure the source.

Column	Description
Name column	Specifies the name of the source.
Use Advanced Document Properties column	Enables the use of advanced document properties. Docu ment properties is a complex feature that allows the ma pping of header data to Nuance Output Manager docum

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Column	Description
	ent properties. Only advanced users and professional se rvice engineers should configure this feature. Selecting t his option enables the **Advanced Document Properties Profile** column and disables all other columns.
Advanced Document Properties Profile column	Specifies the document properties profile you want to us e. You can select a profile from the list or click the Brow se button to create or manage profiles from the **Manage Document Properties Profiles** dialog box.
Remaining Document Property	Specifies the document property values. Modify the prop erties by clicking in the appropriate columns. These colu mns are not available when using advanced document pr operties.

Email settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple email sources.

Documents received by the specified email accounts will be routed to Nuance Output Manager.

Click in a cell to configure the value for a setting in a source.

- **Name** — Specifies the name of the source.
- **Email Server** — Specifies the mail exchange server. You can click the Browse button to display the **Mail Server Search** dialog box and search for one on a given domain.
- **Port** — Specifies the port number for the selected protocol. The following table lists common port assignments for the protocols that Output Manager supports:

Protocol	Port
POP3	110
POP3 (SSL enabled)	995
IMAP4	143
IMAP4 (SSL enabled)	993

  The port number for your environment may vary. Refer to an email server administrator for more information.
- **Use SSL** — Select to use SSL (Secure Sockets Layer) to encrypt the connection between the email server and Output Manager.
- **User Name** — Specifies the user name that will be used when logging in to the email account. If the email account does not require a user name, you can leave this box blank.
- **Password** — Specifies the user password that will be used when logging in to the email account. If the email account does not require a password, you can leave this blank.
- **Interval (sec)** — Specifies the time interval for checking the email account for documents. The default value is 60 seconds.
- **Delete Messages** — Deletes the email messages and their attachments from the email server once they have been received into Nuance Output Manager. This option is selected by default.

Specify email components that you want to include in a separate components document that users can print:

- **Include From In Secondary Document** — Includes the email From value.

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- **Include To In Secondary Document** — Includes the email To value.
- **Include CC In Secondary Document** — Includes the email CC value.
- **Include BCC In Secondary Document** — Includes the email BCC value.
- **Include Subject In Secondary Document** — Includes the email Subject value.
- **Include Body In Secondary Document** — Includes the email Body value.

When Nuance Output Manager receives an email, Nuance Output Manager resolves its attachments into documents and creates the components document. Nuance Output Manager then creates a single package that contains all the documents from the email, the attachments, and the components document.

Epic Settings tab (Source Bulk Configuration)

Use this tab to configure an Epic health information sources.

You will use this tab when simultaneously creating multiple sources.

Click directly in the grid to configure the source.

Column	Description
Name column	Specifies the name of the source.
Folder	Specifies the path of the network folder to be monitored. For the selected folder, you must configure the Nuance Output Manager services logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. Right-click the folder in Windows Explorer and click **Sharing and Security** to configure these options.
Scan subfolders	Select the check box to monitor subfolders within specif ied network folder.
Interval (sec)	Specifies how often in seconds to check the selected fold er for files. The default time interval is 10 seconds.
Order	Specifies the order in which Nuance Output Manager rec eives files from the network folder.
Disposition	Specifies what happens to a file in the network folder aft er it is sent to Nuance Output Manager. • Delete — Deletes the original file after sending it to the Nuance Output Manager. This option is selected by default. • Leave — Does not delete or move the original file after it is sent Nuance Output Manager. This causes the file to be sent repeatedly (once each polling **Interval**) until you delete it. • Move — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the new file will be saved with an incrementing number. For example, if

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Column	Description
	file ABC is sent to a folder that already contains a file named ABC, the new file will be saved as ABC_001. Enter the folder path in the Move to box. • Move/Overwrite — Saves the file in another folder after it is sent Nuance Output Manager. If a file by the same name already exists in the folder, the existing file will be replaced by the new file. Enter the folder path in the **Move to** box.
Move to	Specifies the path for the folder to which documents a re moved when **Move** or **Move/Overwrite** is selecte d for **Disposition**. This option is available only when **Disposition** is set to Move or to Move/Overwrite.
EPS binaries	The path of the EPS (Epic Print Service) binaries folder. An example, for a default installation, would be `C:\Epi c\bin\8.1\Epic Print Service`.
EPS incoming	The path of the EPS watch folder. An example for a defa ult installation would be `C:\Epic\Jobs\Incoming \8.1\Epic Print Service`. Output Manager will monitor the configured watch **Folder**. Any unrecognized file will be moved it to this folder for EPS handle. Outpu t Manager currently supports `.ERTF` files and `.ERAW` fil es. Other file types will be moved to this folder.
Convert ERTF To PDF	Select this check box to convert Epic ERTF formatted fi les to PDF.

Filters tab (Source Bulk Configuration)

Use this tab to configure filters for sources.

Filters restrict documents from a source by including or excluding certain groups. You will use this tab when creating multiple sources at once.

The **Filters** tab is only available when configuring email, network folder, and LPD sources.

Click directly in the grid to configure the source.

Specifies the name of the source and applies filters to the source. Filters allow you to restrict documents from a source by including or excluding certain groups. The filter columns that display are specific to the selected source type. You can modify the filter values by typing directly in the grid column. Wild card values of ? or * are accepted, as long as the expressions first character is a numeric or alphabetic character. This filter will be applied to each document received by the selected source.

Folder Settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple network folder sources.

Documents received by this source will be routed to Nuance Output Manager.

Click directly in the grid to configure the source.

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- **Name** column — Specifies the name of the network folder source.
- **Folder** column — Specifies the path of the network folder that will be monitored. For the folder selected, you must configure the Nuance Output Manager service logon account user name to have Full Control Sharing permissions. Also verify the Administrators group has Full Control Security permissions. Right-click the folder in Windows Explorer and click **Sharing and Security** to configure these options.
- **Scan Subfolders** column — Specifies if you want to check the subfolders of the network folder.
- **Interval (sec)** column — Specifies the time interval for checking selected folder for files. The default time interval is 10 seconds.
- **Order** — Specifies the order in which Nuance Output Manager receives files from the network folder.
- **Disposition** column — Specifies what will happen to the original file after it is sent to the Output Manager Console.
  - Delete — Deletes the original file after sending it to the Output Manager Console. This option is selected by default.
  - Leave — Does not delete or move the original file after sending it to the Output Manager Console. This causes the file to be sent repeatedly (once at each occurrence of the spooling Interval) until you delete it.
  - Move — Saves the file in another folder after it is sent to the Output Manager Console. If a file by the same name already exists in the folder, the new file will be saved with an incrementing number. For example, if file ABC is sent to a folder that already contains a file named ABC, the new file will be saved as ABC_001. Enter the folder path in the Move to box.
  - Move/Overwrite — Saves the file in another folder after it is sent to the Output Manager Console. If a file by the same name already exists in the folder, the existing file will be replaced by the new file. Enter the folder path in the Move to box.
- **Move To** column — If Move or Move/Overwrite is selected as the file **Disposition**, this column becomes available. Specify the folder path where the file will be moved.

FTP Settings tab (Source Bulk Configuration)

Use this tab to simultaneously configure multiple FTP sources. Documents received by this source will be routed to Nuance Output Manager.

You can access this tab when you create or configure multiple FTP sources.

Click in a cell to configure the value for a setting in a source.

- **Name** column — Specifies the name of the FTP source.
- **FTP Server** column — Specifies the FTP server, which can be an FTP or IP address.
- **Port** column — Specifies the host's port number. The port number must be from 1 through 65536. The default value is 21.
- **Use Passive Mode** column — Determines if the host mode will be passive or active. Selecting the check box selects passive mode, where the client creates a session to receive data. Clearing the check box will choose active mode, where the host creates a separate or new session to transfer data in response to a request from the client.
- **User Name** column — Specifies the user name that will be used when logging on to the host account. If the host account does not require a user name, you can leave this cell blank.
- **Password** column — Specifies the user password that will be used when logging in to the account. If the account does not require a password, you can leave this cell blank.
- **FTP Folder** column — Specifies the location on the host from which the files will be retrieved when receiving files. You must type the entire path of the folder or the path relative to the FTP user home directory (for example, if your home directory is at `\FTP\UserName`, you can specify either `\FTP\UserName\MySourceFiles` or `\MySourceFiles`).
- **Scan Subfolders** column — Determines if you want to scan any subfolders of the specified FTP folder.

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- **Remove Subfolders** column — Determines if you want to delete the subfolders of the FTP folder, after the files are transferred into Nuance Output Manager.
- **Interval (sec)** column — Specifies the time interval for checking the host for documents. The default value is 60 seconds.
- **Temp Folder** column — Specifies the location files are transferred into during the FTP session. When the session is complete they are put in the file store.

General tab (Source Bulk Configuration)

Use this tab to specify general source information when creating multiple sources at once.

Column	Description
Name	Specifies the name of the source.
Server	Specifies the Nuance Output Manager server where the Nuance Output Manager Input Service is located for this source. The source does not have to be on the same serve r as the Nuance Output Manager Input Service.
Location	Specifies any specific location information for the sourc e.
Comments	Lists any general comments about the source.

IPP settings tab (Source Bulk Configuration)

Use this tab to simultaneously configure multiple IPP (Internet Printing Protocol) sources. You can access this tab when you create multiple IPP sources.

The settings on this tab configure URLs that are used to communicate with IPP printers. The URL is formed as follows:

`http://ipaddress:port/instancename`

Make sure that the network and firewall are configured to allow incoming traffic to the specified IP addresses and port numbers.

Column	Description
Name	Specifies the name for IPP source.
IP address	Specifies the IP address for the IPP printer.
Port	Specifies the port that the server uses to communicate wi th the printer. The default port setting is 631.
Instance name	Specifies the instance name for the printer.
Enable SSL	Select this check box to use SSL to communicate with th e printer.

LPD Settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple LPD sources.

Documents received by these sources will be routed to Nuance Output Manager.

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Click directly in the grid to configure the source.

- **Name** column — Specifies the name of the LPD source.
- **Port** column — Specifies the host's port number. The default value is 515.
- **IP Address** column — Specifies the host's IP address.
- **Default Queue** column — Specifies the default queue which will process all requests made to unrecognized queues. All defined LPD queues are listed.
- **Temp Folder** column — Specifies the location files are transferred into during the LPD session. When the session is complete they are put in the file store.
- **LPD Queue** column — Click the browse button (**...**) to add LPD queues using the **Manage LPD Queue Subdevice** tab pages. You will need to configure the options on the **LPD queue settings** tab.

More Settings tab (Source Bulk Configuration)

Use this tab to configure common configuration options that available to all source types.

You will use this tab when simultaneously creating multiple sources.

Click directly in the grid to configure the source.

- **Hold** column — Sets all documents received by this source to the Hold state as they enter the Output Manager Console.
- **Do Not Process Business Rules** column — Disables business rule processing for all documents received by this source as they enter the Output Manager Console.
- **Use PDF Quick Count column** — Enables optimized page counting for PDF jobs. When this option is enabled, the **Count Pages**, **Detect Color**, **Detect Data Type**, **Detect Duplex**, and **Detect Trays** options are disabled.
- **Count Pages** column — Performs a page count on all documents received by this source as they enter the Output Manager Console. Selecting this option may cause performance degradation.
- **Detect Color** column — Detects if the document contains color. The Documents grid **Color** column displays True or False depending if color is detected.
- **Detect Data Type** column — Detects the document data type and displays it in the Documents grid **Data Type** column.
- **Detect Duplex** column — Detects if the document is configured for duplex printing. The Documents grid **Duplex** column displays how the document will print (One Sided, Two Sided Short Edge, or Two Sided Long Edge).
- **Detect Trays** column — Detects the document paper tray that will print the document and displays it in the Documents grid **Input Bin** or **Output Bin** column. You can configure the **Output Bin** column to display by using the Administration **Configure Document Properties Utility**.
- **File Store** column — Sets a file store for all documents received by this source as they enter the Output Manager Console. The default file store is selected by default. Administrators define file stores and select the default in the **Set General Preferences Utility**. If the default file store is changed in the **Set General Preferences Utility**, all sources using the default will be automatically updated.
- **Document Folder** column — Assigns a document folder for all documents received by this source as they enter the Output Manager Console. The default document folder is **Un-Filed Documents**. Click the browse button (**...**) to select a different folder.
- **Use Advanced costing** — Enables the use of Advanced Costing Profiles, in which you can enter specific costs associated with printing.
- **Advanced Costing** — Specifies the Advanced Costing Profile that will be associated with the source. You can select one of the existing profiles from the list, or click the browse button (**...**) to manage or create a new profile. Profiles are configured on the **Advanced Costing Profile** dialog box. This option is only available if **Use advanced costing** is selected.
- **B&W Cost** column — Specifies the printing cost per page for black and white documents.

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If you want to bill less than 1 cent per page, you must change the Windows currency settings to display more than 2 decimal places. To do this, open Windows **Control Panel** and click **Regional and Language**. On the **Formats** tab, click **Additional Settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.

- **Color Cost** column — Specifies the printing cost per page for color documents.

  If you want to bill less than 1 cent per page, you must change the Windows currency settings to display more than 2 decimal places. To do this, open Windows **Control Panel** and click **Regional and Language**. On the **Formats** tab, click **Additional Settings**. Click the **Currency** tab and change the **No. of digits after decimal** option to either 3 or 4.
- **Notification profile** column — Allows for sending a notification when a document arrives, prints successfully, prints on failover destination, or is in error state. The notification can be sent as an email message or a pop-up. Notification profiles are used to send notifications. You can use the list to select an existing notification profile or click the browse button (**...**) to create or manage profiles from the **Manage Notification Profiles** dialog box.

Output Settings tab (Source Bulk Configuration)

Use this tab to configure output options that available to all source types.

You will use this tab when simultaneously creating multiple sources.

Column	Description
Schedule Output	Schedules all documents received by this source to print at your selected date and time. From the list, you can choose to print the documents today, on a specific day, or in the future. You can also choose to print as soon as possible, at a specific time, or in the future.
Route To Destination	Specifies a destination where all documents received by this source can be routed. Click the Browse button to select one or more destinations in the tree. Use the Shift and Ctrl keys to select multiple destinations. Destination groups cannot be selected. This option is set to Unrouted by default.
Override default retain settings	Determines if you want to override default retention period and configure the retain options as necessary. Selecting this option enables the **Retain** and **Retain Period** columns.
Retain	Determines if you want to retain documents received by this source.
Retain Period	Specifies the retain period in days.
Output Process	Specifies if you want to use an output process. Output processes can be created to impact documents as they are being sent to a destination. The processes contain a set of actions which could be used for search and replace, setting finishing options, editing PJL commands, inserting overlays, and so on. You can select an output process from the list or click the browse button (**...**) to create or manag

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Column	Description
	e profiles from the **Manage Output Process Profiles** di alog box.
Failover Profile	Specifies if you want to use a failover profile. Failover p rofiles specify what should happen to documents when t hey are sent to inaccessible destinations (they are not ab le to receive documents). You can select a failover profi le from the list or click the browse button (**...**) to create o r manage profiles from the **Manage Failover Profiles** di alog box.
Override Default Auto Delete Settings	Specifies if you want to override the default automatic d eletion settings for all spooled documents received by th is source.
Auto Delete	Specifies if you want to automatically delete spooled doc uments received by this source.
Auto Delete Hours	Specifies the interval in hours that spooled documents ar e automatically deleted if you enabled **Override Default Auto Delete Settings**.

Socket settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple socket sources.

Documents received by the IP address and port specified will be received into Nuance Output Manager.

Click directly in the grid to configure the source.

- **Name** column — Specifies the name of the socket source.
- **Port** column — Specifies the port number. The default number is 9100.
- **IP Address** column — Specifies the IP address on the local system where the socket device will receive documents. In most cases, this can be left blank, as most systems only have one IP address. For systems with multiple adapters or if multiple IP addresses are supported (that is, when using a VPN), this specifies the IP address for the appropriate port.
- **Support PJL Status Readback** column — Enables the socket source to emulate two way printer communications. The print job sender can send PJL commands that prompt a printer to respond with status information, and if it expects a response, it may wait until that response arrives before continuing with the job.

Web Upload Settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple Web upload sources.

Documents received by these sources will be routed to Nuance Output Manager.

Click directly in the grid to configure the source.

- **Name** column — Specifies the name of the Web upload source.
- **Web Server** — Specifies the web server for this source. The list is populated with the web servers available to the selected server.
- **Source Capabilities Profile** — Specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or

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click the browse button (**...**) to create and manage profiles from the **Manage Source Properties Profiles** dialog box.

WebSphere MQ settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple WebSphere MQ sources. This source will receive WebSphere MQ messages.

WebSphere MQ is a message queuing system designed by IBM that runs on many platforms such as Windows, Unix, Linux, and z/OS. Nuance Output Manager provides an interface into that queuing system. Nuance Output Manager can then communicate (send and receive messages) with other applications using WebSphere MQ.

Important: To use this source, you must install a WebSphere MQ client separately.

Click directly in the grid to configure the source.

- **Name** column — Specifies the name of the WebSphere MQ source.
- **Queue Manager** column — Specifies the name of the queue manager. This must match the queue manager specified in WebSphere MQ. The queue manager administers the queues that have been created on it (these are known as local queues).
- **Queue Name** column — Specifies the queue name where messages received by this source will be stored. This must match the queue name specified in WebSphere MQ. The queue name along with the name of its queue manager, provides a unique address where messages can be received.
- **Channel Name** column — Each WebSphere MQ queue manager has different types of connectivity options. Since Nuance Output Manager uses TCPIP for the channel connection, you must specify the channel configured for TCPIP. You can get this name from the WebSphere MQ list of channels.

Warning: Make sure the SSL certificate required option is not selected in WebSphere MQ. Nuance Output Manager does not support this at this time.

- **Connection Name** column — Specifies the connection name. The connection name is the IP address and (port) or DNS name for the server to which you are attempting to connect. Messages are transferred over the connection and placed in the queue.

Windows Queue Settings tab (Source Bulk Configuration)

Use this tab to simultaneously create multiple Windows queue sources.

Click directly in the grid to configure the source.

- **Name** column — Specifies the name of the Windows queue source.
- **Output Manager Port Associated With** column — Lists the Windows printers that are using the Output Manager Port Monitor, but have not had a Source created and associated with it. Once a Source has been created and associated, those printers will be removed from the list.
- **Source Capabilities Profile** column — Specifies which print preferences/document properties are supported by this source. Those preferences are stored in a source property profile. Click the arrow to select an existing profile, or click the browse button (**...**) to create and manage profiles from the **Manage Source Properties Profiles** dialog box.

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Specify LDAP Server Connection dialog box

Use the LDAP Import Utility to import users and groups from an LDAP source. You can access the LDAP Import Utility when you import LDAP users or groups from the **User and Group Selection** dialog box, **Users** tab, or **Groups** tab.

To import LDAP users or LDAP groups into Nuance Output Manager, you must specify an existing LDAP server or a new server. Use this dialog box to define the LDAP server that contains the users or the groups that you want to import.

Choose LDAP Server

Specifies the server. To choose an existing server, click the arrow in the box and select a server. To define a new LDAP server, click **New**. The **LDAP Server Details** grid becomes available for entry.

LDAP Server Details

Server type — Specifies a server type of either Microsoft Active Directory Server or Generic LDAP Server. A server type of Generic LDAP Server operates correctly in a Microsoft Active directory environment. However, specifying Microsoft Active Directory Server if you are connecting to an ADS (Active Directory Server) offers the benefits of established security and relationships.

Modify Server Details — Enables the **LDAP Server Details** boxes if you want to modify information about an existing server.

Server name — Indicates the name by which you want to identify this server.

Server address — Specifies the DNS (Domain Name System) name of the server. In most cases, you can simply specify the server address in domain name format, for example, nuance.com.

Port — Identifies the standard IP port for the LDAP server.

Login ID (DN Format) — Specifies the DN (distinguished name) of a user with administrative rights.

Password — Contains this user's password.

Save Changes button — Saves the changes that you have made to the LDAP information.

Cancel Changes button — Cancels any changes that you have made to the LDAP information.

Verify Connection button

Confirms that a connection can be established with the information you have entered. After clicking this button, you will see either **Success** or **Failure** to the right of the button.

Specify SQL User dialog box

Use this dialog box to specify the SQL user to be used when connecting using SQL authentication.

You can access this dialog when you configure the SQL authentication type on the **OM services configuration** tab.

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User

Specifies the SQL user to be used during SQL authentication. This user must be a member of the sysadmin server role for the SQL Server instance.

Password/Confirm password

Specifies and confirms the password for the user.

Text Extraction Variable Definition dialog box

Use this dialog box to create one or more variables that will be used for bursting or extraction. You can access this dialog when you configure **Burst - Line Mode** and **Burst - Page Mode** business rule actions.

Name

Specifies the name of the extraction variable.

Description

Provides a description of the extraction variable.

Type

Specifies the type of extraction variable, **Burst** or **Extract**. The **Burst** variable is used to set the burst conditions on the **Burst Conditions** tab. The **Extract** variable is used to extract text from the document. It becomes an extraction variable available on the **Set Document Properties** tab. You can set a document property from the value extracted in the extraction variable.

Once a variable of a particular type has been created, it cannot be changed to the other type.

Trim Spaces

Specifies if you want to remove spaces found at the start and end of the extracted text. To remove the spaces, select the **Trim spaces** check box.

Location on page

Determining location is different for bursting using line mode and bursting using page mode. See the descriptions in the appropriate sections of *Working with Business Rules*.

Line mode

Line/Record — Specifies the line/record number from which the text will be extracted. If you are detecting using records, it will be the record number of the current page (that is, variables on page 2 and greater are relative to line 1 on that page). If you selected **Banner mode**, the recognition line becomes line 1 and the extraction variables are relative to it.

Column — Specifies the start column for the extraction.

Extract — Specifies the number of characters to extract.

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Page mode

Specifies the region (rectangle) from which text will be extracted.

Tip: The region values can be found by viewing a document with the Nuance Output Manager viewer. In the viewer, click **View** > **Text Selection Mode** on the menu bar. Then, drag the cursor to select the desired region. The coordinates will appear in the status bar.

Upper left corner X coordinate — Specifies the upper left corner X coordinate.

Upper left corner Y coordinate — Specifies the upper left corner Y coordinate.

Width — Specifies the width of the region in millimeters (mm).

Height — Specifies the height of the region in millimeters (mm).

Page selection

These options are only available for **Extract** type variables.

Specifies the page of the newly created burst document from which you want to extract the text. You can enter a **Page** number or select **First page with non-blank value in selected location**.

Text Resource dialog box

Use this dialog box to configure a text resource. You can access this dialog box when you configure a text resource in the **Process Designer** or the **Resource Manager** dialog box.

Name

Specifies the name of the text resource.

Description

Provides a description of the text resource.

Comments

Displays any comments about the resource.

Printer Family

Use the check boxes to determine if the resource will be used for all printer families or only for certain printer families.

Data Type

Use the check boxes to determine if the resource will be used for all data types or only for certain data types.

Import Resource Data

Browse button — Allows for importing resource data. Imported files must contain text data.

Code page — Specifies the code page to be applied to the resource data.

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Resource Editor

Enter the resource data text.

To go to a specific line in the resource, right-click in the box and click **Go To** (or press Ctrl+G). In the box that displays, enter the line number and click **OK**. The line will be highlighted in the **Resource Editor**.

To find specific text, right-click in the box and click **Find and Replace** (or press Ctrl+F) to display the search dialog box.

Export button

Allows for exporting the resource data. Unlike the **Export** button on the **Resource Manager** dialog box, this exports only the text data from the **Resource Editor** area to a text file.

Transform Adept dialog box

Use this dialog box to configure a business rule action to transform documents using the Adept transform suite.

Tip: If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Nuance Support to ensure the data is converted properly.

Server

Specifies the licensed rules agent server that you would like to use.

Parameters

Convert from — Specifies if you want to convert from the Xrx or Afp format.

to — Specifies the format you want to convert to.

Ini — Specifies the Ini resource that will control the format of the printed output. You can select a defined Ini resource in the drop-down list or click the browse button (**...**) to create, modify, or import Ini resources from the **Resource Manager** dialog box. Ini resources are created using the **Ini Resource** dialog box.

Ini description — Provides a description of the selected Ini resource.

Ini default — Specifies the default Ini resource.

EXE path — Specifies the Adept executable path.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

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Transform Office Files dialog box

Use this dialog box when you create a business rule action to convert Microsoft Office files to PDF documents.

Server

Select the server with the Rules Agent service that runs the business rule.

Office file formats to convert

Specifies the types of Microsoft Office files that you want to convert. Click the drop-down list and select the file formats.

Use Microsoft API if available

Specifies if Nuance Output Manager uses the Microsoft API component when converting the following file formats:

- DOC
- DOCX
- XML
- ODT
- OOXML
- RTF
- HTML
- XHTML
- MHTML
- TXT

Complex RTF documents were not accurately converted with the third-party product in earlier versions of Nuance Output Manager. Enabling this option used the Microsoft API to improve conversion accuracy. To use this option, verify that Microsoft Word 2013 is installed on the same server that hosts the Rules Agent Service that processes the action. Newer versions of Nuance Output Manager contain an improved third-party conversion product.

Follow on actions

Input document — Specifies how Nuance Output Manager processes the original input Microsoft Office file. You can delete, retain, or process the next rule for the input document. If you select **Process next rule**, the input document skips the rest of the actions in the current rule and is processed at the start of the next rule.

Follow-on actions are available only when configuring transform actions for business rules.

Transform Package dialog box

Use this dialog box to specify the transform package you want to use.

You can access this dialog box when you create or modify a transform package in the **Configure Transform** dialog box.

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Transform package name

Specifies the transform package name.

Transform package type

Specifies the type of transform package.

- **EXE path** — Specifies the exe path.
- **Profile path** — Specifies the profile path.

Transform Record Mode (Advanced) dialog box

Use this dialog box to configure a business rule action to transform documents using record mode (advanced). This advanced option is used to perform custom conversions using DCO chains. This provides flexibility to specify code pages, carriage controls, record formats, and so forth. for the incoming document and the output desired.

Tip: If needed, you can use the **Data Conversion Utility** to create custom DCOs for converting data formats. This will not be necessary for most users. If you think this conversion is necessary, please contact Nuance Support to ensure the data is converted properly.

Server

Specifies the licensed rules agent server that you would like to use.

Parameters

Code page in — Specifies the code page that represents the current status of the input document. The default format is 037 (EBCDIC).

Code page out — Specifies the code page that represents how the file is being transformed. The default format is 437 (ASCII).

FCB — Specifies the FCB resource that will control the vertical format of printed output. You can select a defined FCB in the drop-down list or click the browse button (**...**) to create, modify, or import FCBs in the **Resource Manager** dialog box. FCBs are created using the **FCB Resource** dialog box.

FCB description — Provides a description of the selected FCB.

FCB default — Specifies the default FCB. The default is STD, a predefined FCB with 66 lines and channel stop 1 on line 1.

In type — Specifies the input data type.

Out type — Specifies the desired output data type.

Data type after conversion — Specifies the data type of the output documents.

Use block lengths — Enables or disables the use of block lengths in the record. When this option is selected, records include a block count. The block count will directly precede the record count. In the following example, the block count consists of the first four hexadecimal values (`00 0C 00 00`) and the record count consists of the second four hexadecimal values (`00 08 00 00`):

```
00 0C 00 00 00 08 00 00 F1 F2 F3 F4
```


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FCB override — Enables or disables overriding FCBs. Enabling this option causes FCBs in the beginning of the data to be ignored, functioning as if there were no FCBs in the data.

Send FCB — Enables or disables sending FCBs to the printer.

Delimiter — Selects the type of delimiter to use. You can choose one of the following:

- None — Records do not include delimiter characters.
- ASCII — Records include an ASCII delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above.
- EBCDIC — Records include an EBCDIC delimiter. Each record ends in a carriage return and line feed character. The actual record length is two bytes more than the fixed record length specified above.

Truncate Trailing Blanks — Enables or disables the truncating of trailing blanks.

Pad record — Enables or disables pad record. Enabling this option pads blank records with a space.

Pad skip1 — Enables or disables pad skip to channel 1. Enabling this option pads blank records with a space.

Length — Specifies the length of the fixed records. The default value is 80.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Transform Record Mode (Basic) dialog box

Use this dialog box to configure a business rule action to transform documents using record mode (basic). This will perform the most common transforms for data coming from a Output Manager Print Server device. This converts .tnj to ASCII text, .anj to AFP, and .bnj to .bin.

Server

Specifies the licensed rules agent server that you would like to use.

Follow on actions

Input document — Specifies the follow on actions for the input document (original document). You can choose to delete, retain, or process the next rule for the original document. The newly created documents (output documents) continue with the next rule action.

Universal PS Driver Wizard

Use the Universal PS Driver Wizard to create new windows queues, and new Output Manager Sources to associate them with. The new queues will use which will use the NSi Universal PS Driver, Additionally, new Output Manager Destinations and Devices can be created to associate with the new sources. All documents sent to the Windows queues will be received in Output Manager through the new sources and automatically be routed to the associated destinations.

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Task	Description
Create a single Windows print queue	This procedure describes how to create a single Microsoft Windows print queue with an Output Manager source, destination, and device.
Use manual grid entry to add multiple Windows print queues	This procedure describes how to use the manual grid entry to simultaneously add multiple Microsoft Windows print queues with OM sources, destinations, and devices.
Import multiple queues from a file	This procedure describes how to import Microsoft Windows queue information from a file. After you import the file, you can edit queue properties before creating the queues.

Restriction: The Universal PS Driver Wizard is used to create Windows queues and Output Manager sources. These queues can be shared to Active Directory, but are not published to individual workstations. Users can browse to the printers (Windows print queues) and add them manually. Alternatively, the printers can be pushed out to workstations by various network management tools.

How to create a Microsoft Windows print queue

This procedure describes how to create a single Microsoft Windows print queue with an Output Manager source, destination, and device.

In Windows **Devices and Printers**, confirm that the NSi Universal PS Driver is installed on all Nuance Output Manager servers that host print queues.

You can create a new Microsoft Windows print queue using a new or existing device or destination.

1. In the **Output Manager Console**, click **Tools** > **Universal PS Driver Wizard**.
2. On the **Welcome** page, choose an option as described in the following table, and then click **Next**:

Option	Description
Add New OM Destinations, and OM Devices	Choose this option to create new Microsoft Windows queues and new sources, new destinations, and new devices.
Add New OM Destinations to match with existing OM Devices	Choose this option to create Microsoft Windows queues and new sources and new destinations when the devices already exist in Output Manager.
Match with existing OM Destinations	Choose this option to create new Microsoft Windows queues and new Output Manager sources when the destinations and devices already exist in Output Manager.

3. On the **Select method to create Windows Queues** page, select **Add one queue**.
4. In the **Create queues on server** drop-down list box, select the Nuance Output Manager server on which to create the queue.

   Note: The NSi Universal PS Driver must already be installed on the selected server.

5. If you selected **Add New OM Destinations to match with existing OM Devices**, specify how the server communicates with the printer, and then click **Next**.

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- To use the printer DNS name, select **Use DNS name for printers if available**.
- To use the printer IP address, clear **Use DNS name for printers if available**.

6. In the **Configure a single Windows Queue** page, configure the **Windows Queue Information** options as described in the following table:

Option	Description
Windows queue name	Specifies the print queue name on the server.
Share to the network as	Enable this option to use a different name to identify the printer to users on the network.
Location	Type the physical location of the printer (for example, `Sales department`, or `Europe office`).
Comments	Type the purpose, use, configuration, ownership, or other characteristics of the printer.

7. Select a source group in which to create the new Nuance Output Manager source.
8. Choose the File store location for documents to be stored.
9. The next steps depend on whether you are adding a new destination or device.

   Add a new destination and a new device:

   a) In the **Create destination on server** drop-down list box, select the Nuance Output Manager server on which to create the destination.
   b) Type the destination name and select the destination type.
   c) Select the destination group to which the destination belongs.
   d) Select the SNMP server for the new device.
   e) Specify the IP address or DNS name of the device.
   f) Define the port or queue name (LPR) that the destination uses to communicate with the device.
   g) Select the device group to which the device belongs.

   Add a new destination for an existing device:

   a) Select the Nuance Output Manager server on which to create the destination.
   b) Type the destination name and select the destination type.
   c) Select the destination group to which the new destination belongs.
   d) Define the port or queue name (LPR) that the destination uses to communicate with the device.
   e) Select the existing device.

   Use an existing destination:

   a) Select the existing destination.

10. Click **Next**.
11. Review the message on the **Confirm Action Wizard** page, and then click **Create**.
    This completes the procedure and displays a log form of completed actions along with any errors that may have occurred.
12. Optional: Review and save the log form.
13. Click **Finish**.

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How to add multiple Microsoft Windows print queues

This procedure describes how to use the manual grid entry to simultaneously add multiple Microsoft Windows print queues with OM sources, destinations, and devices.

Verify that the NSi Universal PS Driver is installed on all Nuance Output Manager servers that host print queues.

You can use the **Output Manager Universal PS Driver Wizard** documented by this procedure to create destinations of type Socket, LPR, or IPP.

1. In the **Output Manager Console**, click **Tools** > **Universal PS Driver Wizard**.
2. On the **Welcome** page, choose an option as described in the following table, and then click **Next**:

Option	Description
Add New OM Destinations, and OM Devices	Choose this option to create new Microsoft Windows queues and new sources, new destinations, and new devices.
Add New OM Destinations to match with existing OM Devices	Choose this option to create Microsoft Windows queues and new sources and new destinations when the devices already exist in Output Manager.
Match with existing OM Destinations	Choose this option to create new Microsoft Windows queues and new Output Manager sources when the destinations and devices already exist in Output Manager.

3. On the **Select method to create Windows Queues** page, select **Add multiple queues - manual grid entry**.
4. In the **Create queues on server** drop-down list box, select the server on which to create the queues.

   Note: The NSi Universal PS Driver must already be installed on the selected server.

5. If you selected **Add new OM Destinations to match with existing OM Devices**, specify how the server communicates with the printer, and then click **Next**.
   - To use the printer DNS name, select **Use DNS name for printers if available**.
   - To use the printer IP address, clear **Use DNS name for printers if available**.
6. On the **Configure multiple Windows Queues** page, specify the number of queues in the **Number of rows to add** field, and then click **Add**.
7. Configure options for each row in the grid as follows:

All queues	Configure the following options for all new queues:
Option	**Description**
Windows Queue Name	Specifies the name for the queue.
Shared	Select this option to share the queue on your network.
Share Name	The label that identifies the shared queue on the network. Use the share name to access a network resource with a UNC name (for example, *\\server\share name*).
Location	Type the physical location of the printer (for example, `Sales office` or `Europe office`).

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Option	Description
Comment	Type additional information about the queue.
Source Group	Select the Nuance Output Manager source group folder.
File Store	The location where Nuance Output Manager stores files. The default settings is specified by the **Document file store path** option in the Output Manager Console on the **Administration** > **Set General Preferences** > **General** tab.
Output Server	Select the Nuance Output Manager server that hosts the destination.
New destinations	Configure the following options for new destinations:

Option	Description
Destination Name	Type the name for the new destination.
Destination Type	Select the destination type.
Destination Group	Select the destination group to which the new destination belongs.
Port or Queue	Specifies the port or queue name (LPR) that the destination uses to communicate with the device.
New devices	Configure the following options for new devices:

Option	Description
Snmp Server	Select the SNMP server for the device.
Device Group	Select the device group to which the new device belongs.
Ip Addr or Dns Name	Type the IP address or DNS name for the device.
Existing devices	Click the browse button (**...**) to select the existing device.
Existing destinations	Select the existing Nuance Output Manager destination.

8. Click **Next**.
9. Review the message on the **Confirm Action Wizard** page, and then click **Create**.
   This completes the procedure and displays a log form of completed actions along with any errors that may have occurred.
10. Optional: Review and save the log form.
11. Click **Finish**.

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How to import queues from a file

This procedure describes how to import Microsoft Windows queue information from a file. After you import the file, you can edit queue properties before creating the queues.

Verify that the NSi Universal PS Driver is installed on all Nuance Output Manager servers that host print queues.

1. In the **Output Manager Console**, click **Tools** > **Universal PS Driver Wizard**.
2. On the **Welcome** page, choose an option as described in the following table, and then click **Next**:

Option	Description
Add New OM Destinations, and OM Devices	Choose this option to create new Microsoft Windows queues and new sources, new destinations, and new devices.
Add New OM Destinations to match with existing OM Devices	Choose this option to create Microsoft Windows queues and new sources and new destinations when the devices already exist in Output Manager.
Match with existing OM Destinations	Choose this option to create new Microsoft Windows queues and new Output Manager sources when the destinations and devices already exist in Output Manager.

3. On the **Select method to create Windows Queues** page, choose **Add multiple queues - import from file**.
4. In the **Create queues on server** drop-down list box, select the server on which to create the queues.
5. If you selected **Add new OM Destinations to match with existing OM Devices**, specify how the server communicates with the printer, and then click **Next**.
   - To use the printer DNS name, select **Use DNS name for printers if available**.
   - To use the printer IP address, clear **Use DNS name for printers if available**.
6. On the **Select file and delimiter** page, enter the path or browse to the text file that contains the values to create the Microsoft Windows queues, sources, destinations, and devices.

   This can be any text file with comma, tab, or semicolon delimiters.
7. If the first row of the file contains column headers, select **First row contains column headers**.
8. In the **Select the file delimiter** box, select the delimiter that separates values in each row of the file.
9. Click **Next**.
   The **Map imported columns** page of the wizard appears.
10. For each value in the **Create Queue Headers** column, select the corresponding text file value in the **Imported Headers** column.

    Note: If the column header values in the text file are the same as the values in the **Create Queue Headers** column, Nuance Output Manager automatically maps the values.
11. Click **Next**.
12. Configure options for each row in the grid as follows:

All queues	Configure the following options for all new queues:
Option	**Description**
Windows Queue Name	Specifies the name for the queue.
Shared	Select this option to share the queue on your network.

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Option	Description
Share Name	The label that identifies the shared queue on the network. Use the share name to access a network resource with a UNC name (for example, *\\server\share name*).
Location	Type the physical location of the printer (for example, `Sales office` or `Europe office`).
Comment	Type additional information about the queue.
Source Group	Select the Nuance Output Manager source group folder.
File Store	The location where Nuance Output Manager stores files. The default settings is specified by the **Document file store path** option in the Output Manager Console on the **Administration** > **Set General Preferences** > **General** tab.
Output Server	Select the Nuance Output Manager server that hosts the destination.
New destinations	Configure the following options for new destinations:

Option	Description
Destination Name	Type the name for the new destination.
Destination Type	Select the destination type.
Destination Group	Select the destination group to which the new destination belongs.
Port or Queue	Specifies the port or queue name (LPR) that the destination uses to communicate with the device.
New devices	Configure the following options for new devices:

Option	Description
Snmp Server	Select the SNMP server for the device.
Device Group	Select the device group to which the new device belongs.
Ip Addr or Dns Name	Type the IP address or DNS name for the device.
Existing devices	Click the browse button (**...**) to select the existing device.
Existing destinations	Select the existing Nuance Output Manager destination.

13. Click **Next**.
14. Review the message on the **Confirm Action Wizard** page, and then click **Create**.

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This completes the procedure and displays a log form of completed actions along with any errors that may have occurred.

15. Optional: Review and save the log form.
16. Click **Finish**.

User and Group Selection dialog box

Use this dialog box to select Nuance Output Manager users and groups. All users and groups in the Nuance Output Manager database will be listed. This dialog is used to select users and groups for configuring security roles, assigning permissions for the Output Manager Console, Destinations, Sources, and Documents, and configuring notification profiles during source configuration and business rule creation.

Select users and groups

Displays the users and groups in the Nuance Output Manager database.

More Users button

If the user or group you want is not listed, click **More Users** to choose the type of users you want to add. Once users are added, they are placed in the Nuance Output Manager database, causing them to always be listed in the future. Choose one of the following options from the list.

- **Add OM User** — Displays the **OM User** dialog box for adding Nuance Output Manager users.
- **Add LDAP User** — Displays the **LDAP User** dialog box for adding LDAP users.
- **Add Windows Users and Groups** — Displays the **Users and Groups** dialog box for adding Windows users and groups.
- **Import LDAP Users and Groups** — Displays the **LDAP Import Utility** for importing LDAP users and groups.

User Print Rules Profile dialog box

Use this dialog box to configure a user or group print rules profile. User and group print rules profiles set restrictions based on the type of document, for example, precluding color printing and documents that exceed a certain number of pages.

Profile name

Specifies the name of the user or group print rules profile.

Profile description

Specifies a description of the user or group print rules profile.

Restrictions—Disallow printing

Select any of the following options to determine how printing should be restricted:

- **Always** — Disables printing for all documents.
- **If page count exceeds** — Disables printing when the number of pages exceeds the specified limit.

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- **If document byte count exceeds** — Disables printing when the document size is greater than the specified byte limit.
- **If document contains color** — Disables printing if a document contains color.
- **Ignore Windows queue restrictions for this user (if any)** — Disables any restrictions set up for this user or group in a Windows queue profile.

Show client pop-up for this user

Displays the client pop-up window for this user or group. If you select this check box, the following configuration options are displayed for configuration of the client pop-up window.

Client pop-up general options

Use the check box options to specify the cost accounting pop-up settings. These settings determine what is displayed on the client pop-up window:

- **Show job cost on pop-up**
- **Allow user to override job costs on pop-up**
- **Allow user to specify if job is billable**
- **Allow user to enter additional comments**
- **Show account balance on pop-up**

Select up to five billing lists to be displayed on the client pop-up

Use the grid to select and configure up to five billing lists to be displayed in the client pop-up window:

- **Active** column — Specifies that the rows with selected check boxes will be active.
- **Caption** column — Specifies the caption text that will be displayed on the client pop-up window.
- **Input Type** column — Specifies the input type that will be displayed on the client pop-up. You can select a type of Drop Down, Write In, or Drop Down with Write In.
- **Billing List** column — Specifies the billing list. Billing lists are configured in the **Manage Billing Accounts Utility**.

Show this pop-up instead of the pop-up (if any) configured for the Windows queue

Indicates that you want to see this pop-up window rather than the pop-up window defined for a Windows queue. If you have configured a pop-up window for the Windows queue, it is displayed by default. If you select this check box, this pop-up window will be displayed rather than that for the Windows queue.

Advanced button

Converts this basic user or group profile into an advanced profile. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile. To configure an advanced profile, you use the **User Print Rules Manager** dialog box.

User Print Rule dialog box

Use this dialog box to create advanced print management rules for users and groups. You can configure print management rules to set up restrictions based on the type of document. Examples of user print rules are precluding color printing and documents that exceed a certain number of pages.

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Name

Specifies the name of the print management rule.

Enabled

Specifies whether the rule is enabled or disabled. This field is enabled by default.

Description

Accepts a description of the print management rule. This description is displayed in the **User Print Rules Manager** dialog box and in the **Manage Print Rules Profiles** dialog box.

Rule definition

Always execute this rule (no conditions) — Use this option to apply the rule to all documents. Selecting this option disables the **When** box because no condition statements are needed.

When

Use the **When** box to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group.

To create a condition, click the **<Target>** link and then click the appropriate condition. Click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. The condition statement is completed.

You can select the condition statement and use the buttons below the box to add and remove conditions:

- To enable the **Add Condition** and **Remove Condition** buttons so that you can add and remove condition statements, select a condition radio button (inside the blue box).
- To enable the **Add Group** and **Remove Group** buttons so that you can add and remove groups, select a group radio button (outside the blue box). The **Add Condition** button, used to add a condition to the selected group, will also be enabled.

Perform the following actions

Use the **Perform the following actions** box to create and manage rule actions:

- To create an action, click the **<Action>** link and then click the appropriate action type. You can create actions that ignore Windows queue restrictions, override the Windows queue pop-up window, disallow printing, perform cost accounting, route to a specified destination, set the document owner, set the document state, and notify about print rules management restrictions.
- To create additional actions, click **Add Action**.
- To modify an action, click the desired action link or click the area next to the link, and then click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

Follow-on action

Select the action you want to take after this rule has been processed. You can continue processing rules or choose not to process any additional rules.

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User Print Rules Manager dialog box

Administrators can use this dialog box to create advanced print management rules for users and groups. Rules are configured by selecting an event and then configuring the document process that will be performed when that event occurs. Examples of user print rules are precluding color printing and documents that exceed a certain number of pages.

Rules grid

The rules grid lists all of the defined print management rules in the order that they will be processed. When you select a rule, it is displayed for preview below the grid. The rules grid is editable. Use the following procedures from the rules grid:

- To specify whether the rule is enabled or disabled, use the check box in the **Enabled** column.
- To rename a rule, click the **Name** cell and make the change.
- To modify the rule description, click the **Description** cell and make the change.
- To change the follow-on action, click the **Follow-on Action** cell and select the action you want to take after this rule has been processed. You can continue processing rules or choose not to process any additional rules.

The following buttons are displayed below the grid:

- **Add** button — Creates a new print management rule. This opens the **New User Print Rule** dialog box.
- **Modify** button — Modifies the selected print management rule. This opens the **Edit User Print Rule** dialog box.
- **Remove** button — Deletes the selected print management rule.
- **Copy** button — Creates a copy of the selected rule. Click the **Name** cell of the new rule to rename it.
- **Move Up** button — Reorders the rules by moving the selected rule up.
- **Move Down** button — Reorders the rules by moving the selected rule down.

Rule preview

Displays a preview of the selected rule.

Users tab

Use this tab to add, remove, and manage individual users. You can configure an email address and the inheritance of quota management settings; specify a quota management profile to disable printing under certain circumstances; and set print balances for cost control.

Click an option you want to learn more about.

- *Groups tab* on page 550
- *Departments tab* on page 492

Show only previously configured users

Displays users that were previously added by an administrator.

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Show all users

Displays all previously configured users and any users automatically created by Nuance Output Manager. When documents are received by a Nuance Output Manager source, the document owner is automatically added as an Nuance Output Manager user if it is not already contained in the Nuance Output Manager database.

Include removed users

Displays users that were previously removed by an administrator.

Users grid

From this grid, you can add and manage individual users.

User Name — Specifies the user name that will be used when logging in to the server.

Full Name — Specifies the full name and email address of the user.

Type — Indicates whether this user is an Nuance Output Manager user, an LDAP user, or a Windows user.

Domain or Machine — Indicates whether the location of the security database for the user account is a domain account or a local machine account.

Email — Specifies the email address for the user.

Inherit — Specifies whether this user inherits quota settings from the department. When a new user is automatically added to a department or when the department settings are changed by an administrator, the administrator has the option of assigning the existing settings to the new user or the new settings to other members of the department. Note, however, that the balance for each user changes individually. That is, the department does not share a balance. Assigning quotas using inheritance is a good practice because administrators can more easily manage quota settings.

Do Not Track — Specifies that you do not want to track jobs from the printer.

Card ID — Identification value for the card that the user scans to log in at a device.

Secondary Card ID — Identification value for a second card that the user scans to log in at a device. The value can be another card ID or a user ID or PIN.

Print Rule Profile — Profile that defines printing restrictions for the user and whether the system notifies the user of restrictions by email or through the Desktop Client.

Desktop Client Profile — Name of the client profile assigned to the user. To select a profile, click the cell and select a profile from the list. To manage profiles, click the Browse button to display the **Manage Desktop Client Profiles** dialog box. The column is only visible when the Desktop Client is licensed.

Device Profile — Profile that controls the information that appears on the device when the user logs in or releases a print job. For example, you can configure the profile to prompt the user for a billing account when the user releases a print job.

Print Delegates — User or group that has permission to print for the selected user.

Set Balance — Indicates if a print allowance is assigned to the user. Selecting this option activates Allowances Profile, Remaining Balance, and Next Refresh.

Allowances Profile — Profile that controls quota and cost management values for the user. For example, you can configure a profile that controls how many color pages a user can print during a specified period.

Remaining Balance — Monetary balance available to the user to print documents.

Remaining Copy Balance — Monetary balance available to the user to copy documents.

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Remaining Pages (Color or Total) — Number of pages available to the user if you set a total or color page limit in the allowances profile.

Remaining Pages (B&W) — Number of black and white pages available to the user if you set a black and white page limit in the allowances profile.

Next Refresh — Date on which the new accounting period begins.

Print Delegates — User or group that has permission to print for the selected user.

Role — Indicates whether the user is a system administrator, security administrator, or does not belong to a role.

Print or Export Users Grid button

Opens a **Preview** window in which you can print, email, or export the user grid in a document, data, or image format. The export command exports the user list to the to one of the following file formats: PDF, HTML, MHT, RTF, XLS, XLSX, CSV, text (tab delimited), and image (BMP, EMF, WMF, GIF, JPEG, PNG, TIFF). The email command exports and emails the user list file in all of the same formats except for HTML.

User/Group Import Wizard button

Allows importing users into Nuance Output Manager from a CSV file on disk, Active Directory users and groups, and LDAP users and groups. You can specify exactly how you want to do the import (for example, the column from the CSV file that contains the user names). You can also specify if you want to run the wizard as a scheduled task. For example, if you configured the wizard to run every 24 hours and an employee changed departments, if HR updated their department in Active Directory, Nuance Output Manager would pick that up change within 24 hours.

More Users button

If the user to whom you want to assign quota settings is not listed, click **More Users** to add that user. Once users are added, they are placed in the Nuance Output Manager database and will always be listed in the future. Choose one of the following options from the list:

- **Add OM User** — Displays the **OM User** dialog box for adding Nuance Output Manager users.
- **Add LDAP User** — Displays the **LDAP User** dialog box for adding LDAP users.
- **Add Windows Users** — Displays the **Users and Groups** dialog box for adding Windows users and groups.

Modify button

Depending on the type of user selected, displays the **Edit Windows User** dialog box, the **OM User** dialog box, or the **LDAP User** dialog box so that you can change the information.

Remove button

Deletes the selected user.

Viewer Configuration dialog box

Nuance Output Manager allows you to configure the Viewer utilities that display when you right-click documents in the Output Manager Console. The Output Manager Viewer utility is part of the Output Manager Console and can be opened for all supported data types. In addition, you can define the other Viewer utilities you want to use, depending

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on the data type of the documents. To access the **Viewer Configuration** dialog box, on the Output Manager Console menu bar, click **Tools** > **Configure Viewer**.

Step 1: Select a Viewer

Displays all of the installed Viewer utilities. Click directly in the grid to modify.

Viewer name — Specifies the name of the Viewer utility. This is the name that displays when you right-click documents in the Output Manager Console.

Viewer path — Specifies the path and file name of the Viewer utility executable. You can type the path and file name or click the browse button (**...**) in the cell to navigate.

Arguments — Specifies any command line options or switches used to start the utility with the desired configuration.

Delete — Deletes the Viewer utility in the associated row. The Output Manager Viewer cannot be deleted.

Step 2: Enter the data types

Displays the data types the selected Viewer utility can open. Click in the grid to modify.

Data Type — Specifies the data types the selected Viewer utility can open. You can select individual data types for each row or select **Undefined** or **All data types**.

Conversion (Advanced) — Changes record formats of the incoming data, before passing the data to the Viewer utility. Choose if you need to convert files from the Output Manager Print Server (.tnj) file format to one of the following types: binary (.bin), text (.txt), or Xerox (.xrx).

Delete — Deletes the data type in the associated row.

Windows Queue Quota Profile dialog box

Use this dialog box to configure a Windows queue profile. Windows queue profiles consist of configuring quota management for the queue. Quota management can be configured to set up restrictions based on the document properties. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

Profile name

Specifies the name of the Windows queue profile.

Profile description

Specifies a description of the Windows queue profile.

Restrictions - Disable printing

Use the following options to determine when printing should be disabled.

- **Always** — Disables printing for all documents.
- **If document is not duplex** — Disables printing for documents not configured for duplex printing.
- **If page count exceeds** — Disables printing when the number of pages exceeds the specified limit.
- **If document byte count exceeds** — Disables printing when the document size is greater than the specified byte limit.

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- **If document contains color** — Disables printing if a document contains color.
- **If pages printed in the calendar month exceeds** — Disables printing based on the number of pages printed in a calendar month. If the document page count is greater than the number of allowed pages to print, printing will be disabled.

Restriction Notification Options

Use the following options to determine how you want to be notified if a restriction occurs.

- **Notify via email** — Selects the email profile that will be used to send notifications. You can select a profile from the list or click the Browse button and mange profiles from the **Manage Outbound Email Profiles** dialog box. From this dialog box you can create and modify email profiles.
- **Notify via client pop-up** — Notifications will display on the client pop-up.

Show client pop-up for this Windows queue

Displays the client pop-up for this Windows queue. Selecting this check box displays the following sections for configuring the client pop-up.

Client pop-up general options

Use the check box options to specify the cost accounting pop-up settings. This determines what will display on the client pop-up.

- Show job cost on pop-up
- Allow user to override job costs on pop-up
- Allow user to specify if job is billable
- Allow user to enter additional comments
- Show account balance on pop-up

Select up to five billing lists to be displayed on the client pop-up

Use the grid to select and configure up to five billing lists to be displayed in the client pop-up.

- **Active** column — The rows with selected check boxes will be active.
- **Caption** column — Specifies the caption text that will display on the client pop-up.
- **Input Type** column — Specifies the input type that will display on the client pop-up. You can select **Drop Down**, **Write In**, or **Drop Down with Write In**.
- **Billing List** — Specifies the billing list. Billing lists are configured in the **Manage Billing Accounts Utility**.

Advanced button

Converts this basic Windows queue profile into an advanced Windows queue profile. Once the profile has been converted to an advanced profile, it cannot be returned to a basic profile. The advanced profile will use the **Windows Queue Quota Rules Manager** to configure the profile.

Windows Queue Quota Rule dialog box

Use this dialog box to create advanced quota management rules for Windows queues. You can configure quota management rules to set up restrictions based on the type of document. Examples include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

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Name

Enter the name of the quota management rule.

Enabled

Use the check box to enable or disable the rule. This option is enabled by default.

Description

Enter a description of the quota management rule. This will display in the **Windows Queue Quota Rules Manager** dialog box.

Rule definition

Always execute this rule (no conditions) — Use this option to apply the rule to all documents. Selecting this check box disables the **When** box, as no condition statements are needed.

When

The **When** box is used to create and manage the rule conditions. Multiple conditions can be created and organized into groups. A blue box is used to indicate a condition group.

To create a condition, click the **<Target>** link and use the list to select the appropriate condition. Click the **Operation** link to select the appropriate operation. Click the **Value** link to select the appropriate value. This will complete the condition statement.

You can select the condition statement and use the buttons below the box to add and remove conditions.

- Select a condition radio button (inside the box) to enable the **Add Condition** and **Remove Condition** buttons for adding and removing condition statements.
- Select a group radio button (outside the box) to enable the **Add Group** and **Remove Group** buttons for adding and removing groups. This will also enable the **Add Condition** button for adding a condition to the selected group.

Perform the following actions

The **Perform the following actions** box is used to create and manage rule actions.

- To create an action, click the **<Action>** link and select the appropriate action type. You can create actions to do the following: disallow printing, perform cost accounting, route to destinations, set document owners, and set document state.
- To create additional actions, click **Add Action**.
- To modify an action, click the desired action link or click the area next to the link and click **Modify Action**.
- To delete an action, click the area next to the link and click **Remove Action**.
- To reorder the actions, click the area next to the action link and click **Move Up** or **Move Down**.

Follow-on action

Select the action you would like to take after this rule has been processed. You can continue processing rules or select not to process any additional rules.

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Windows Queue Print Rules Manager dialog box

Administrators can use this dialog box to create advanced quota management rules for Windows queues. Rules are configured by selecting an event and then configuring the document process that will be performed when that event occurs. Example quota management rules include disallowing color printing, requiring documents to be duplex, disabling print from certain applications, and so on.

Option	Description
Rules list	This table lists all of the defined quota management rules , in the order they will be processed. Selecting a rule will display the rule for preview below the grid. You can edit values within the table. • **Enabled** — Select or clear a check box in this column to enable or disable a rule. • **Name** — Click a cell in this column to edit the name of a rule. • **Description** — Click a cell in this column to change the description of a rule. • **Follow-on Action** — To change the follow-on action, click in a cell in this column and select the action you would like to take after this rule has been processed. You can choose to Continue processing rules or Do not to process any additional rules.
Add	Click this button to create a new quota management rule. Displays the **Windows Queue Quota Rule** dialog box.
Modify	Click this button to modify the selected quota managem ent rule. Displays the **Windows Queue Quota Rule** dial og box.
Remove	Click this button to delete the selected quota managemen t rule.
Copy	Creates a copy of the selected rule. Click in the **Name** ce ll of the new rule to rename.
Move Up	Click to move the selected rule up in the list.
Move Down	Click to move the selected rule down in the list.
Preview for rule	Displays a preview of the selected rule.

Zip Package dialog box

Use this dialog box to configure a zip package ad hoc rule action. You can access this dialog when you configure the action in the **Ad Hoc Rule** dialog box or when you create and run the action against documents in the **Documents** grid.

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Zip File Name

Specifies the name of the zipped file.

Used as a post-processing action

Specifies this rule will be used after all documents have been received into Nuance Output Manager.

Original documents

Determines what will happen to the original documents after the zipped file has been created. You can leave them in the spooler, move them to retain, or delete them.

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