

Perceptive Document Composition

Client Product Guide

PDC Version: 5.4

Written by: Product Documentation, R&D
Date: February 2014

perceptivesoftware
from Lexmark

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Perceptive Document Composition Client


About Perceptive Document Composition Client

The Perceptive Document Composition client helps you to create documents based on the predefined document templates and text blocks. The templates are designed by the text administrators using the Perceptive Document Composition studio.

In Perceptive Document Composition, you use several objects to create documents.

- **System.** A system is a collection of document templates and other related objects.
- **Bundle.** A bundle is a set of documents that logically belong together and are created together.
- **Document template.** A document template is a blueprint for creating documents. A document template can be static or dynamic.
- **Text block.** A text block is a piece of text that is used in one or more documents. Text blocks can contain other text blocks and variables.
- **Variable.** A variable is used within a text block and is a piece of information or an image that can vary for each document created from a document template.


About the Navigator pane

The Navigator pane allows you to administrate all Perceptive Document Composition Client objects and displays the system folders. It also displays the text blocks, documents, and bundles of the system depending on the filter settings you provide. If the Navigator pane is not visible, you can activate it by clicking the Navigator  button available in the Windows toolbar.

Select a system


A system contains bundles, document templates, and text blocks that belong together. The client opens the last system by default.

To open a new system, complete the following steps.

1. On the **Navigator** toolbar, click the **Select system**  button.
2. In the **Select system** box, select a system you want to open. If you want to run a bundle, make sure you have at least one bundle in the system you have selected.
3. Click **OK**.
4. Optional. To cancel this selection, select a new system click **Cancel**.

Filter settings

To select the object types you want to display in the Navigator pane, complete the following steps.

1. On the **Navigator** toolbar, click the **Filter Settings**  button.
2. In the **Filter Settings** dialog box, select the objects you want to display in the **Navigator** pane.
3. Click **OK**.

Perform a search

When searching, you can optionally use an asterisk (*) as a wildcard character. For example, *billing lists all objects that end with billing, while *billing* lists all objects that have billing in the object name. The


wildcard character must be at the beginning or end of the search string, so, for example, a search string like Sum*billing is not valid.

To search for objects in the Navigator pane, complete the following steps.

1. On the **Navigator** toolbar, type the initial letters of the object you want to search in the **Search** box.
2. Press ENTER.

Display the output pane

The Output pane displays information, status messages, error messages, and console output. To display the output if it is not visible, complete the following step.

- On the **Windows** toolbar, click the **Output Window**  button.

Edit a document template

To edit a document template, you must have the right **Client Edit Document Templates (39)**.

Complete the following steps to edit a document template.

1. In the **Navigator** pane, in the list of objects, double-click the document template you want to edit.
If no document template is visible, check the [filter settings](#).
2. Inspect the information that displays on the document template tab.
If object [versioning](#) is licensed, and the document template is a release version, Document Composition creates a new work version after editing.
3. In Word, rearrange the document and edit text sections.
Do not change content controls.
4. Optional. If object [versioning](#) is licensed, you can create a new work or release version.
5. Save and close the document template tab.
You cannot save or close the Word document directly.

Notes

- You cannot open a static document.
- You cannot change a locked document. When you open it, a message appears. To resume, confirm the message dialog. The document opens for edit, but you are unable to save any changes.

Edit a text block

To edit a text block, you must have the right **Client Edit Text Blocks (40)**.

Complete the following steps to edit a text block.

1. In the **Navigator** pane, in the list of objects, double-click the text block you want to edit.
If no text block is visible, check the [filter settings](#).
2. Inspect the information that displays on the text block tab.
If object [versioning](#) is licensed, and the text block is a release version, Document Composition creates a new work version after editing.
3. In Word, rearrange the document and edit text sections.
Do not change content controls.
4. Optional. If object [versioning](#) is licensed, you can create a new work or release version.

5. Save and close the text block tab.
You cannot save or close the Word document directly.

Note You cannot change a locked text block. When you open it, a message appears. To resume, confirm the message dialog. The text block opens for edit, but you are unable to save any changes.


Generate Bundles

Generate a bundle

 [Show All](#)

To generate a bundle, complete the following steps.

1. Complete one of the following substeps.
 - **To generate a bundle from the Navigator pane, complete the following substeps.**
 1. In the **Navigator** pane, in the list of objects, double-click the bundle you want to generate.
 2. In the **Process Options** dialog box, complete the following substeps.
 1. Optional. In the **Process title** box, type a process title that uniquely identifies a bundle in a process list.
 2. Optional. In the **Process type** box, type a process type. This process type is also available in the workflow.
 3. Click **OK**.
 - **To generate a bundle from the process list, complete the following substeps.**

On the **View** toolbar, click the **Processes**  button.

In the **Processes** window, search for the preferred process, verify its [status](#), and then double-click the process.
 2. Optional. [Add documents to a bundle](#).
 3. Optional. [Add text blocks to a document in a bundle](#).
 4. Optional. To activate or deactivate a document template or a text block, right-click the document template or the text block and click **Switch State**.
- Notes**
- Document templates or text blocks with a red dot are required and are included in the generated bundle. You cannot deactivate them.
 - Document templates or text blocks with a green dot are included in the generated bundle. You can deactivate them.
 - Document templates or text blocks with no dot are not included in the generated bundle. You can activate them.
5. **Optional. To assign an external document to a document template, complete the following steps.**
 4.
 1. Right-click the document template and click **Assign External Document**.
 2. In the **Select External Document** dialog box, select a document and click **Open**.

Notes

4.
 - The text **(external document)** displays to the right of the document template.
 - This function is available for active static documents and replaces documents in the bundle with external documents.
 - You can replace documents with external documents of the same type.
 - To be able to use this functionality, you must possess the right **Assign / remove external document file (33)**.
5. **Optional. To assign an external document to a text block, complete the following steps.**

5.
 1. In the left pane, click the document template.
 2. In the right pane, right-click the text block and click **Assign external document**.
 3. In the **Select External Document** dialog box, select a document and click **Open**.



Notes

5.
 - The text **(external document)** displays to the right of the text block.
 - This function is available for active text blocks without child objects and replaces text blocks with external documents.
 - You can replace text blocks with external Microsoft Word documents.
 - To be able to use this functionality, you must possess the right **Assign / remove external text block file (34)**.
6. **Optional. To verify or change the printer settings for all documents in the bundle, complete the following substeps.**

Note Changing the printer settings might be not possible due to the **Changes Allowed** option set in Perceptive Document Composition Studio.


6.
 1. In the left pane, to the right of a bundle, click **Printer Settings**.
 2. In the **Printer Settings for all references of the bundle** dialog box, in the **Printer** list, select a printer.
 3. Under **Print time**, select either the **Direct** or **Shifted** option.
 - **Direct.** The ODIN output processing processes the documents contained in a bundle as one unit. ODIN generates a "stack" that contains all documents in a bundle. You can use this option if you prefer to only print or email the documents.
 - **Shifted.** The ODIN output processing processes the documents contained in a bundle as independent documents. You can use this option if you require to implement postprocessing of documents.
 4. Click **OK**.
7. **Optional. To verify or change the printer settings for a single document in the bundle, complete the following substeps.**

Note Changing the printer settings might be not possible due to the **Changes Allowed** option set in Perceptive Document Composition Studio.

1. In the left pane, to the right of a document, click **Printer Settings**.
2. Optional. In the **Printer Settings** dialog box, for a document copy, in the **Text on copy** box, type the text.
Note This box is protected for original documents.
3. Optional. In the **Number of copies** box, to change the value, type a number or click an arrow.
4. Under **Print time**, select the **Direct**, **Shifted**, or **Local** option. If you select a local print time, specify the printer object provided for local printer. For details on how to configure this object, refer to "Online Printer" for Odin in Perceptive Document Composition Studio help.
 - **Direct.** The ODIN output processing processes the documents contained in a bundle as one unit. ODIN generates a "stack" that contains all documents in a bundle. You can use this option if you prefer to only print or email the documents.
 - **Shifted.** The ODIN output processing processes the documents contained in a bundle as independent documents. You can use this option if you required to implement postprocessing of documents.
 - **Local.** You can print the documents on a local printer.
5. In the **Form** list, select a form.
6. In the **Printer** list, select a printer.
7. Click **OK**.
8. Optional. [Change the output parameters](#).
9. To create the documents of a bundle or to print and archive a bundle, complete one of the following substeps.
 - To create the documents of the bundle, complete the following substeps.
 1. On the **Process** toolbar, click the **Create Documents**  button.
 2. Optional. To open a created document, right-click the document and click **Show Document**.
 3. Optional. To save the created document in a local directory, right-click the document and click **Save Document As**.
 - To print and archive the bundle, on the **Process** toolbar, click the **Print and Archive**  button.

Enter document values manually




If the document template is designed for manual data entry, complete the following steps to enter the appropriate values for the document.

1. In the **Navigator** pane, in the list of objects, double-click the bundle you want to generate.
2. Optional. In the **Process Title** box, type a process title that uniquely identifies a bundle in a process list.
3. Optional. In the **Process Type** box, type a process type.
4. Click **OK**.
5. In the **Document Creation** pane, click the **Create Documents**  button.

6. In the **Manual Variables** dialog box, enter the values. The fields in red color are mandatory.
7. Click **OK**.

Populate a document template with XML data

If the document template is designed for automatic data supply, you can select an XML document to populate the document template.

1. In the **Navigator** pane, in the list of objects, double-click the bundle you want to generate.
2. Optional. In the **Process Title** box, type a process title that uniquely identifies a bundle in a process list.
3. Optional. In the **Process Type** box, type a process type.
4. Click **OK**.
5. On the **Process** toolbar, click the **Retrieve data**  button.
6. In the **Document Creation** pane, click the **Create Documents**  button.
7. In the **Parameter for data retrieval** box, in the **Value** box, click the **Open**  button.
8. Select the XML file you want to open and click **Open**.
9. Click **OK**.

Add documents to a bundle

A bundle is a preconfigured set of document templates. Besides the preconfigured set, you can also add other document templates and text blocks to a bundle. To be able to use this functionality, you must possess the right **Insert Documents Manually (16)**.

Complete the following steps to add a document template to a bundle.

1. In the **Navigator** pane, in the list of objects, double-click the bundle you want to generate.
2. Optional. In the **Process Title** box, type a process title that uniquely identifies a bundle in a process list.
3. Optional. In the **Process Type** box, type a process type.
4. Click **OK**.
5. In the **Navigator** pane, drag a document template to the bundle that you have opened. Any document you add appears in blue color and in italic font style.

Note Any documents you add by using the `AfterDataSelection` script in Perceptive Document Composition Studio, appear in blue, but not in italic font style.

Add text blocks to a document in a bundle

To be able to use this functionality, you must possess the right **Insert Text Blocks Manually (17)**.

Complete the following steps to add a text block to a document in a bundle.

1. In the **Navigator** pane, in the list of objects, double-click the bundle you want to generate.
2. Optional. In the **Process Title** box, type a process title that uniquely identifies a bundle in a process list.
3. Optional. In the **Process Type** box, type a process type.

4. Click **OK**.
5. In the left pane, select a document. Make sure the document you select has at least one text block in its structure. The text blocks that belong to the document template appear in the right pane.
6. In the **Navigators** pane, drag the text block to the right pane in the editor window. Any text block you add appears in blue color and in italic font style.

Note Any text blocks you add by using the `AfterDataSelection` script in Perceptive Document Composition studio, appear in blue, but not in italic font style.

Output Parameters


About output parameters

Perceptive Document Composition Client allows you to select the output parameters for a bundle that contains a large number of documents. This enables you to define various printer settings for a document. You can select output parameters for the documents for which text administrator enabled the **Changes Allowed** option in Perceptive Document Composition studio. In the Output Parameters dialog box, the documents which require the text administrator privilege to modify the print definition are marked with an asterisk (*) symbol.

Select output parameters

To be able to use this functionality, you must possess the right **Print Parameter Assistant (20)**.

To select the output parameters for the documents of a bundle, complete the following steps.

1. On the **Process** toolbar, click the **Output Parameters**  button.
2. In the **Output Parameters** dialog box, in the **Selection** menu, select the value you require.
3. In the **Printer** list, select the printer you want to access, and then click the **Apply to selected objects** button.
4. Optional. In the **Text on Copy** box, type the text you want to see on your print copies, and then click the **Apply to selected objects** button.
5. Optional. In the **Number of copies** box, to change the value, type a number or click an arrow, and then click the **Apply to selected objects** button.
6. Click **Apply**.

Processes

About Perceptive Document Composition processes


In Perceptive Document Composition Client, a process is the task of generating the documents in a bundle. The documents that you generate on the client are stored on the server as long as the process exists. You can forward a process currently open, or a saved process from Processes to another user or group.

Forward a process to a user

To be able to forward a process, you must possess the right **Forward process manually (21)**.

Complete the following steps to forward a process to another user.


1. Generate a bundle either from the **Navigators** pane or from the **Process list**. For details, refer to [Generate a bundle](#).

2. On the **Process** toolbar, click the **Forward**  button.
3. Optional. In the **Forward** dialog box, in the **Title** box, type an appropriate title.
4. Optional. In the **Description** box, type a description of the process.
5. In the **Roles** box, select **No target role**, in the **Users** box, click **Retrieve all users** and select a user.
6. Click **OK**.

Forward a process to a group

To be able to forward a process, you must possess the right **Forward process manually (21)**.


Complete the following steps to forward a process to another group.

1. Generate a bundle either from the **Navigator** pane or from the **Process list**. For details, refer to [Generate a bundle](#).
2. On the **Process** toolbar, click the **Forward**  button.
3. Optional. In the **Forward** dialog box, in the **Title** box, type an appropriate title.
4. Optional. In the **Description** box, type a description of the process.
5. In the **Users** box, select **No target user**, in the **Roles** box, select a role.
6. Click **OK**.

Forward a process to a user and a group

To be able to forward a process, you must possess the right **Forward process manually (21)**.

Complete the following steps to forward a process to a user and a group.

1. Process a bundle either from the **Navigator** pane or from the **Process list**. For details, refer to [Generate a bundle](#).
2. On the **Process** toolbar, click the **Forward**  button.
3. Optional. In the **Forward** dialog box, in the **Title** box, type an appropriate title.
4. Optional. In the **Description** box, type a description of the process.
5. In the **Users** box, click **Retrieve all users** and select a user, in the **Roles** box select a role.
6. Click **OK**.

View forwarded processes


To be able to view the list of forwarded processes, you must possess the right **List of forwarded processes (15)**.


Complete the following step to view the list of forwarded processes.

- On the **View** toolbar, click the **Forwarded Processes**  button.

View information for a process

Complete the following steps to view the details of a process.

1. On the **View** toolbar, click the **Processes**  button.
2. To view the details of a process, on the **Processes** tab, click the process.

3. On the **Processes** toolbar, click the **Extended Information**  button.

Process status

Every process has one of the following statuses.

- **Saved.** You own the process and can open it.
- **Locked.** Another user owns the process and you should not open it.
- **Finished.** The process is already completed and you cannot open it.

Odin Views


About Odin

Odin is a component that processes the documents generated on the Perceptive Document Composition Studio or Client. It uses different processes to manage the generated documents and stores them in a document management system. You use Odin to complete the following actions.

- Convert documents to various formats like TIFF, PDF and XPS.
- Process the documents in a batch.
- Send documents to different channels, such as email, printers, fax, and archival systems.


View Odin process data

To view the jobs of an Odin process, complete the following steps.

1. On the **Administration** toolbar, click the **Odin Views**  button.
2. Click **Process**.
3. Double-click an Odin process to view the process data.


View Odin stacks data

To view the Odin stacks data, complete the following steps.

1. On the **Administration** toolbar, click the **Odin Views**  button.
2. Click **Stacks**.


View Odin open envelopes data

To view data on the open envelopes in Odin, complete the following steps.

1. On the **Administration** toolbar, click the **Odin Views**  button.
2. Click **Open envelopes**.

View Odin open jobs data

To view data on open jobs in Odin, complete the following steps.

1. On the **Administration** toolbar, click the **Odin Views**  button.
2. Click **Open jobs**.

Versioning

About versioning

Versioning is an optional component and is only available when is been licensed for use with the Perceptive Document Composition server.

You can create work versions and release versions of document templates and text blocks.

Opening versioned objects

The newest version of the object, that is the object with the highest version number, opens for editing.

New versions

You can create new versions only for editable objects.

Changes to versioned objects

Creating a new version of a version controlled object has no effect on the version number of parent or child objects.

Example

The **Account_Overview** text block is contained in the **Partner_Application** document template and contains the **Partner_Accounts** child text block.

The **Partner_Accounts** text block contains the **Partner_Account_InterestRate** child textblock .

Document template **Partner_Application**

Text Block **Account_Overview**

Text Block **Partner_Accounts**

Text Block **Partner_Account_InterestRate**

Modifications to the **Partner_Accounts** text block only result in a new version of this text block.

Neither the **Partner_Account_InterestRate** child text block nor the **Account_Overview** child text block receive a new version number.

The **Partner_Application** document template also does not receive a new version number.

Versioning types

A distinction is made between two types of object versions:

Version Type	Example
Release Versions	1.0, 2.0, 3.0
Work Versions	0.1, 1.1, 1.2, 2.1, 3.1, 3.2


Only the highest object version is the active version, regardless of whether it is a work version or a release version. Only this version is used by other objects.

The version number increments automatically. A manual assignment of version numbers is not possible.

Create a new work version from a release version

It is **not** possible to directly create a new release version. To save changes to a release version, you must first create a new work version.

To create a new work version from a release version, complete the following steps.


1. Open the object.
2. Make the required modifications.
3. On the **Quick Access** toolbar, click the **Create New Version**  button.
4. Optional. In the **Create New Version** dialog box, in the **Label** box, type a label.
5. Click **OK**.

Example

You have edited the version **2.0** of an object. The object now receives the version number **2.1**.

Create a new work version from a work version

To create a new work version from a work version, complete the following steps.

1. Open the object.
2. Make the required changes.
3. On the **Quick Access** toolbar, click the **Create New Version**  button.
4. In the **Create New Version** dialog box, select **Work Version**.
5. Optional. In the **Label** box, type a label.
6. Click **OK**.

Example


You have edited the version **2.1** of an object. The object now receives the version number **2.2**.

Create a new release version

Prerequisites

- You must possess the right **Create Release Version**.
- The object was not modified in the editor.

To create a new release version from a work version, complete the following steps.

1. Open the object.
2. Make the required changes.
3. On the **Quick Access** toolbar, click the **Create New Version**  button.

4. Optional. In the **Create New Version** dialog box, in the **Label** box, type a label.
5. In the **Create New Version** dialog box, select **Release Version**.
6. Click **OK**.

Example

You have edited the version **2.2** of an object. The object now receives version number **3.0**.

User Attributes **StartSystemOld** and **StartFolder**

StartSystemOld

By entering the a system object ID in the user attribute **StartSystemOld** you can define a specific start system. This works in a similar fashion to setting the start system in the start parameters.

StartFolder

By entering the name of a folder in the user attribute **StartFolder** you can define a start folder.

Unlike the start parameter **navipath**, the value here is not the path to the folder but the folder name itself.

This attribute, therefore, only has effect on setting a start folder when the **MwsChangeFolder** permission is missing.

Start Parameters/User Attributes

Values set in the start parameters have priority over those specified in user attributes.

- If the start parameters specify a **start system**, that system is preset on application launch.
- If the start parameter is not set, the application checks whether the user attribute **StartSystemOld** is set and then applies the value on application launch.
- If neither options are defined, the last system used is set at application launch.
- If the start parameter **navipath** is set, the following checks are made:
 - If the user has the right **Client Change Folder(27)**, the Navigator switches to the folder.
If the folder is not found, the Navigator switches to the system root folder.
 - If the user does not have the **Client Change Folder(27)** right, the system root folder becomes the default folder for the user.
If the specified folder is not found in the system, a warning is displayed and the Navigator flushed.
Users can change to another system if they have the Change System right.

But this is only possible if the target system has a folder of the same name.

- If the start parameter **navipath** is not set, the following checks are made:
 - If the user attribute **StartFolder** is set and the user has the **Client Change Folder(27)** right, no further action is taken.
 - If the user does not have the **Client Change Folder(27)** right, the system root folder becomes the default folder for the user.

If the specified folder is not found in the system, a warning is displayed and the Navigator flushed.

Users can change to another system if they have the Change System right.

But this is only possible if the target system has a folder of the same name.

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