

Perceptive Document Composition

WebClient Product Guide

PDC Version: 5.4

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

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from Lexmark

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Perceptive Document Composition

About Perceptive Document Composition

Perceptive Document Composition offers a complete solution for output management. With Perceptive Document Composition, you can define document templates, distribute documents, and archive them.

Perceptive Document Composition provides a single environment where you can design and create documents, write text blocks, process generated documents, as well as print and archive them.

Perceptive Document Composition WebClient

About Perceptive Document Composition WebClient

The Perceptive Document Composition WebClient 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.



Log in to the Perceptive Document Composition WebClient

To log in to the Perceptive Document Composition WebClient, complete the following steps.


1. In the login dialog box, in the **User name** box, type your user name.
2. In the **Password** box, type your password.
3. Click **Login**.
4. Optional. To save your credentials for the next time you log in, select the **Remember me** check box.

Log out of the Perceptive Document Composition WebClient

In the **Perceptive Document Composition** window, click the **WebClient**  button and complete one of the following actions.

- To log out from the Perceptive Document Composition WebClient, click the **Logout**  button.
- To save your present system settings and exit from the Perceptive Document Composition WebClient, click the **Exit Client**  button.


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 web 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 **Show filter list**  button.
2. In the **Filter Settings** 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.


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 Options** dialog box, 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.**
 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 the printer you want to access.
 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 implementation of 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 for** 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 implementation of postprocessing of documents.
 - **Local.** You can print the documents on a local printer.
5. In the **Form** list, select a value.
 6. In the **Printer** list, select a value.
 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 the 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 use to create bundle documents.
2. Optional. In the **Process Options** dialog box, 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. This process type is also available in the workflow.
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 use to create bundle documents.
2. Optional. In the **Process Options** dialog box, 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. This process type is also available in the workflow.
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** dialog 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 use to create bundle documents.
2. Optional. In the **Process Options** dialog box, 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. This process type is also available in the workflow.
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 use to create bundle documents.
2. Optional. In the **Process Options** dialog box, 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. This process type is also available in the workflow.
4. Click **OK**.
5. In the right 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 **Navigator** pane, drag the text block to the right pane in the text block area. 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 WebClient 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** list 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 WebClient, a process is the task of generating the documents in a bundle. The documents that you generate on the WebClient 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 **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 **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. 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, 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.

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