

# pdfaPilot Server

## Manual

callas pdfaPilot Server – Manual – Last modified: 13 December 2011

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## callas pdfaPilot Server

### Overview

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callas pdfaPilot Server is a stand-alone application that allows to run the callas software module pdfaPilot CLI in a hotfolder environment or batch process. It is available on Windows and Macintosh platforms.

### Installation

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The callas pdfaPilot Server installation program guides you through the installation process. It sets up callas pdfaPilot Server on your hard disc including pdfaPilot CLI.

You can request the latest version of callas pdfaPilot Server at [support@callassoftware.com](mailto:support@callassoftware.com).

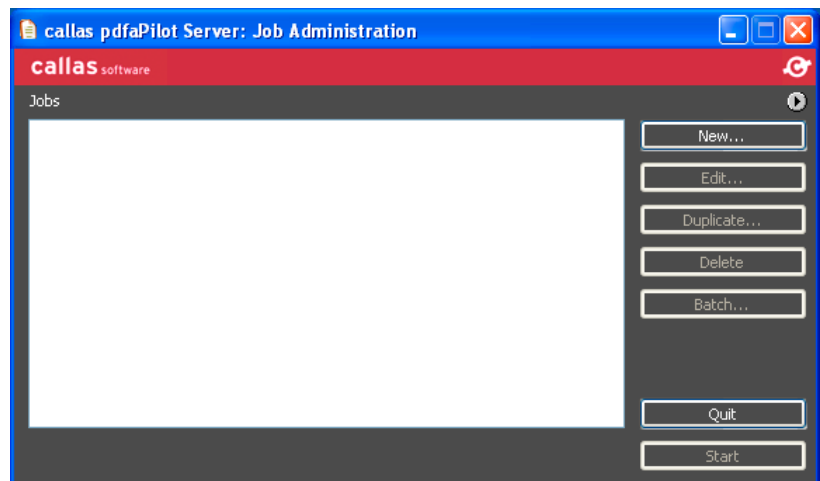
### Program Start

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If you chose to create a desktop icon, you will find the following after the installation is finished:



When starting callas pdfaPilot Server the job administration dialog is displayed:



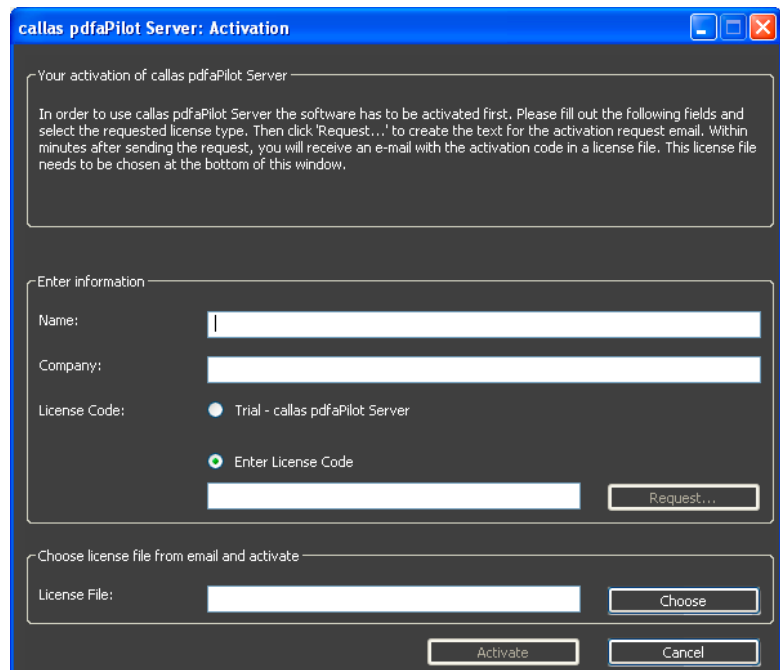
## Activation

In order to use pdfaPilot Server you need to have a valid activation code. From the flyout menu in the upper right corner please choose "About...".

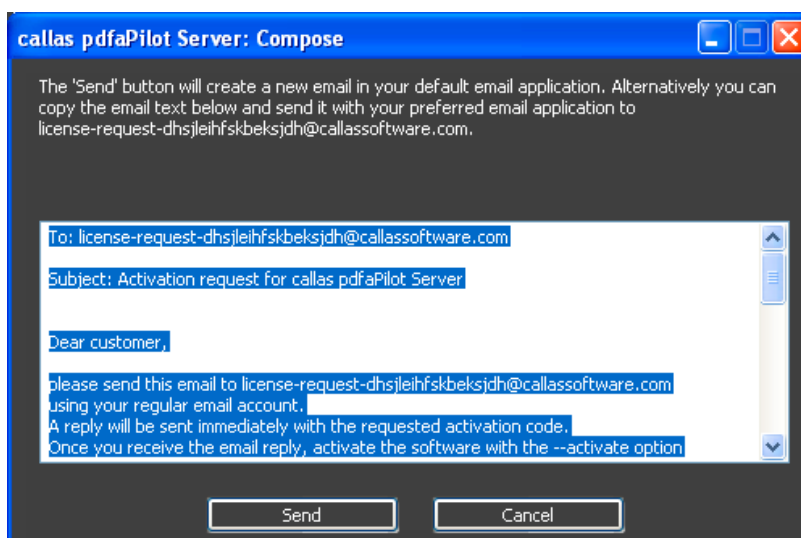


The "About" dialog is opened, where you get version information of callas pdfaPilot Server and the installed module as well as the possibility to activate callas pdfaPilot Server if not already done.

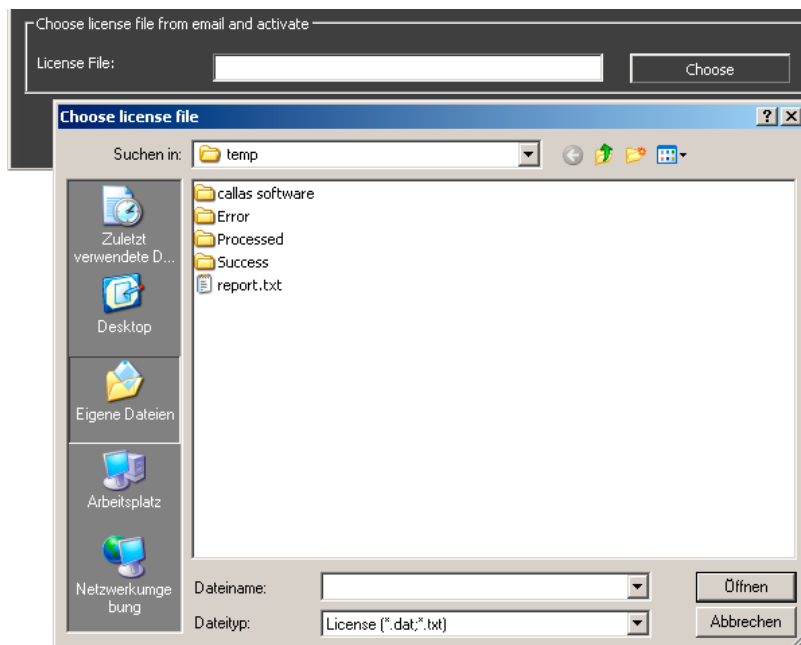
Click on the "Activate" button to open the activation dialog and enter your license information in order to request either a full or trial activation code.



As soon as all necessary information is available, the "Request..." button will create an email text which can either be copied or send directly via your default email application by clicking "Send". You will receive a reply with a license file which is needed for activation.



Alternatively you can choose an already present license file for activation in the lower part of the "Activation" dialog.



- In order to activate pdfaPilot Server for all user accounts of one machine, the license file can be moved from the user folder of the user who has performed the activation to one of the following locations:

Macintosh:	/Library/Preferences/callas software/ callas pdfaPilot CLI <version>
Windows:	<All Users user preferences folder>\ Application data\callas software\ callas pdfaPilot CLI <version>
All platforms:	<callas pdfaPilot Server installation directory>\cli

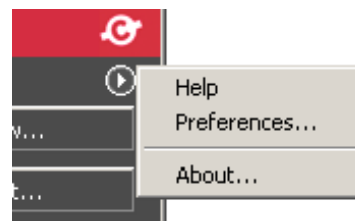
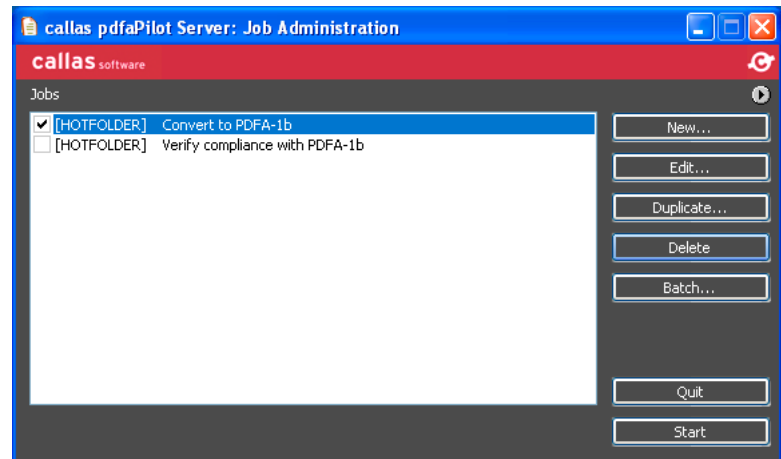
## General

In the job administration dialog the "Start" button allows to start the processing. "Quit" closes callas pdfaPilot Server.

Further options in the job administration dialog are "New" to set up a new job (see section "Setting up of callas pdfaPilot Server"), "Edit..." to edit existing jobs, "Duplicate" to create a duplicate of the selected job and "Delete" to remove the selected job.

The Button "Batch..." will create a duplicate of the currently selected job pre-configured for batch processing (see section "Processing mode").

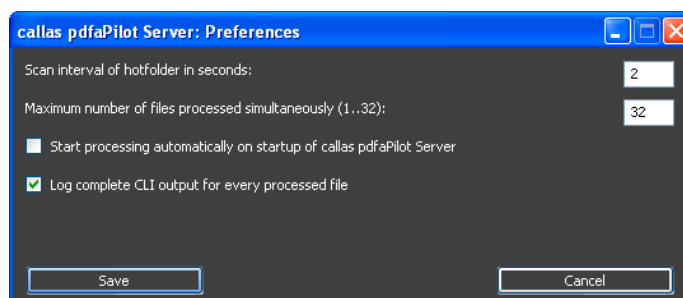
A checkbox in front of each job name allows to activate and deactivate a job. The hotfolders of deactivated jobs are not watched during processing.



The arrow in the upper right corner opens a flyout menu with general options.

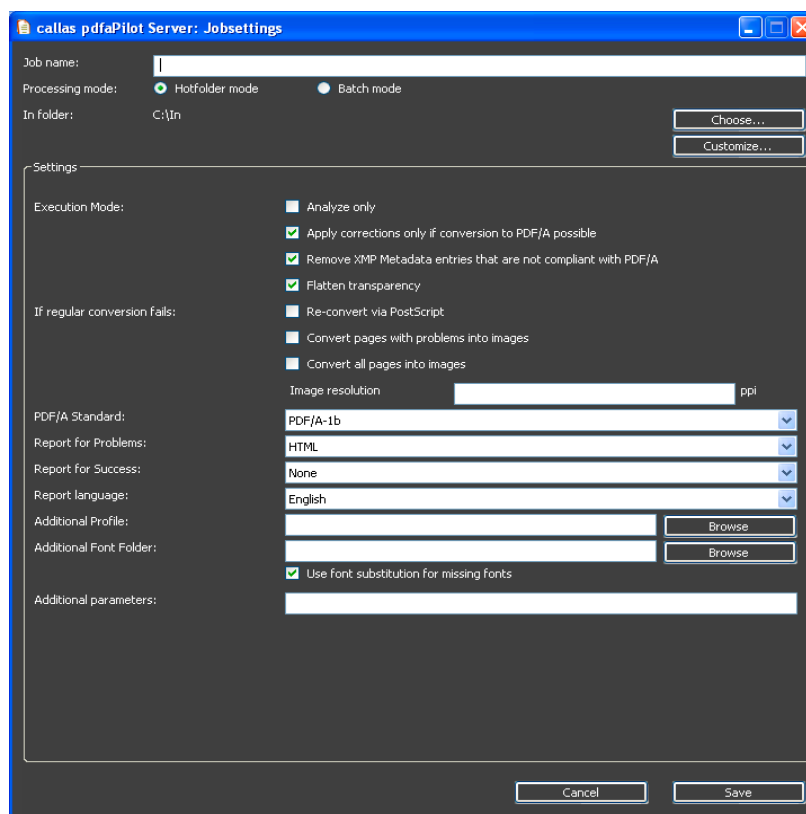
Clicking on "Help" shows the callas pdfaPilot Server manual.

When you click on "Preferences..." a dialog is opened where you can set up the scan interval of hotfolders, the maximum number of parallel processed files and the logging mode.



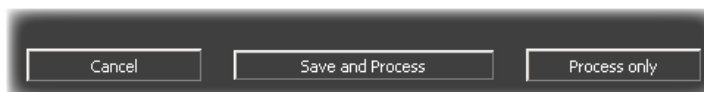
## Setting up of callas pdfaPilot Server

To set up a new job click on the "New..." button in the job administration dialog.



As soon as the chosen settings and folders are valid the "Save" button is enabled and you can save the new job. "Cancel" aborts the job creation. If you entered this dialog via the "Batch..." button in the job administration dialog, all settings will be adopted from the selected job and the folder setup will be set to the default batch configuration (see "Processing mode").

The buttons at the bottom will be slightly different:



You can abort the Batch job, save and process it or only process it.

### Job name

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Enter a unique name that helps you identify the purpose of the job.

### Processing mode

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You can either choose to setup a job in hotfolder or in batch mode. For both processing modes you can define "In", "Success", "Processed" and "Error" folder. The "In" folder must already exist for batch mode, but all other folders will be created if they are missing. For more details see "Folder setup".

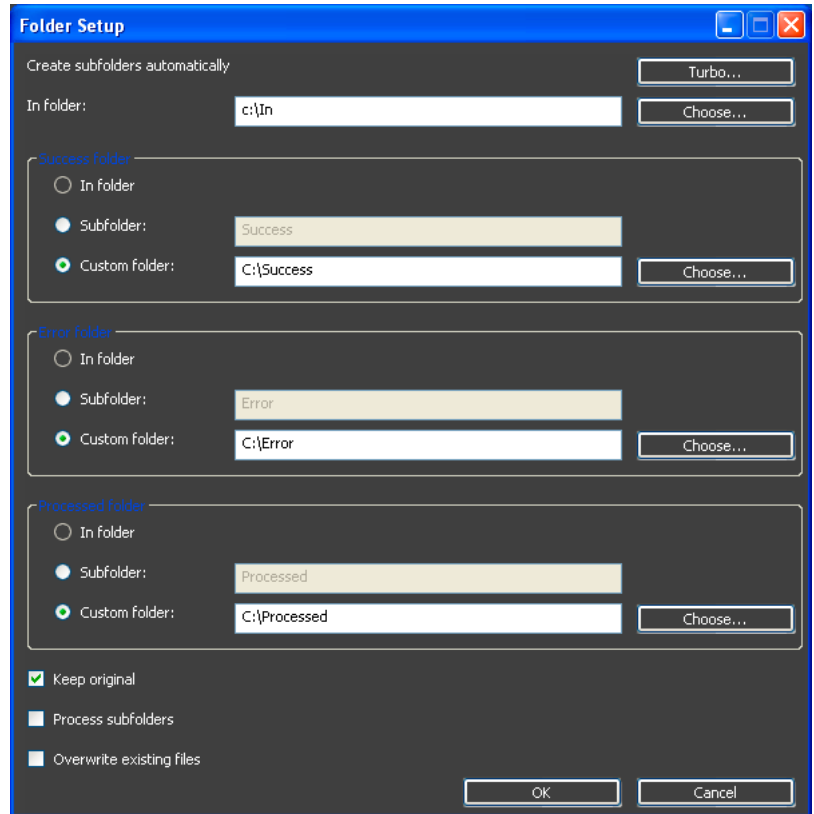
### In folder

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Displays the currently set "In" folder (see "Folder setup").

- On Windows, you can also place files from Office applications in the In folder. These will be converted to PDF before processing. Therefore, Microsoft Office 2007 or newer needs to be installed. If there is no "PDF or XPS" entry under the "File - Save as" menu, you also need to install *SaveAsPDFandXPS*. OpenOffice files can also be converted. OpenOffice 3.2 needs to be installed (standard installation) in order to do so, and the setup assistant which is opened after installation needs to be closed once. In either case, pdfaPilot needs to be activated (see "Activation") and the Microsoft .NET Framework Version 3.5 or newer needs to be installed.
- On Macintosh, all open OpenOffice processes need to be closed before starting the job processing and OpenOffice needs to be installed in the default installation directory (*/Applications/OpenOffice.org*).  
If you want to change the folders, either select the "In" folder via "Choose..." or simply click on the "Customize..." button to open the folder setup.

## Folder Setup



The screenshot shows the "Folder Setup" dialog box with the following configuration:

- Create subfolders automatically:** Turbo... button
- In folder:** c:\In (Choose... button)
- Success folder:**
  - In folder
  - Subfolder: Success
  - Custom folder: C:\Success (Choose... button)
- Error folder:**
  - In folder
  - Subfolder: Error
  - Custom folder: C:\Error (Choose... button)
- Processed folder:**
  - In folder
  - Subfolder: Processed
  - Custom folder: C:\Processed (Choose... button)
- Keep original
- Process subfolders
- Overwrite existing files
- Buttons: OK, Cancel

The "Turbo" button allows to simply choose the parent folder in which all folders are automatically created.

The following table gives you an overview of the folder setup and the restrictions and behaviors of both processing modes.

	<b>Batch</b>	<b>Hotfolder</b>
<b>"In" folder</b>	All files that are placed in the "In" folder at the start of the job will be processed, files that are added during processing are ignored.	The "In" folder will be scanned permanently and newly added files will be appended to the processing queue. The scan interval can be set in the preferences.
<b>Default folder setup (setting the "In" folder via "Choose...")</b>	All other folders are automatically set to the "In" folder and original files will be saved and extended with a "_org" suffix within the "In" folder.	All other folders are created as subfolders of the "In" folder and processing of subfolders is disabled.
<b>"Success" folder</b>	<p><b>Analysis:</b> The original file will be moved to the "Success" folder, if the analysis led to no hits.</p> <p><b>Conversion:</b> The created output file will be moved to the "Success" folder if there were no errors during conversion.</p> <p><b>Reports:</b> will get stored here when analysis led to no hits.</p>	<p><b>Analysis:</b> The original file will be moved to the "Success" folder, if the analysis led to no hits.</p> <p><b>Conversion:</b> The created output file will be moved to the "Success" folder if there were no errors during conversion.</p> <p><b>Reports:</b> will get stored here when analysis led to no hits.</p>
<b>"Error" folder</b>	<p><b>Analysis:</b> The original file will be moved to the "Error" folder, if the analysis led to hits.</p> <p><b>Conversion:</b> If an output file was created it will be moved to the "Error" folder if there were any errors during conversion or if any correction could not be applied.</p> <p><b>Reports:</b> will get stored here when analysis led to hits.</p>	<p><b>Analysis:</b> The original file will be moved to the "Error" folder, if the analysis led to hits.</p> <p><b>Conversion:</b> If an output file was created it will be moved to the "Error" folder if there were any errors during conversion or if any correction could not be applied.</p> <p><b>Reports:</b> will get stored here when analysis led to hits.</p>

	<b>Batch</b>	<b>Hotfolder</b>
<b>"Processed" folder</b>	Original files will be moved here after processing, if "Keep original" is activated. Log files that contain the complete CLI output for every processed file are stored in the "Processed" folders, if logs are not disabled in the preferences.	Original files will be moved here after processing, if "Keep original" is activated. Log files that contain the complete CLI output for every processed file are stored in the "Processed" folders, if logs are not disabled in the preferences.
<b>In folder</b>	Use same path as for "In" folder.	Not available.
<b>Subfolder</b>	Create a subfolder within the "In" folder. "Process subfolders" will be disabled.	Create a subfolder within the "In" folder. "Process subfolders" will be disabled.
<b>Custom folder</b>	Choose any path from file system.	Choose any path from file system.
<b>Keep original</b>	If a new file was created during the process, the original PDF will be moved to the "Processed" folder. If one of the other folders is set to the same folder as the "Processed" folder, original files will be marked with an "_org" suffix.	Originals will be moved to the "Processed" folder if a new file was created.
<b>Process subfolders</b>	Only enabled if the option "Subfolder" is not chosen for any of the folders. The subfolder structure will be re-created in the output folders.	Only enabled if the option "Subfolder" is not chosen for any of the folders. The subfolder structure will be re-created in the output folders.

### Execution Mode

You can decide whether the incoming PDF files should only be analyzed and if corrections should always be executed, even if the file cannot be converted to PDF/A. Besides that you can choose to remove XMP metadata that is not compliant with PDF/A and flatten transparency.

### PDF/A Standard

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You can choose which PDF/A-Standard shall be used for the analyse respectively the correction of the PDF. The available standards are:

- PDF/A-1a
- PDF/A-1b
- PDF/A-2a
- PDF/A-2u
- PDF/A-2b
- PDF/A-3a
- PDF/A-3u
- PDF/A-3b

Due to several reasons a regular conversion may not result in a valid PDF/A document. To ensure conversion 3 additional steps can be performed after a normal conversion if a file can not be converted to PDF/A within this first step. The order they will be performed is as listed.

After each step the resulting file is checked for compatibility with the choosen standard. Each step is optional.

### Report for Problems vs. Report for Success

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You can define different report types for successful or erroneous runs. You can choose between the following report types:

- None
- None for Problems and Success (Quick mode, Conversion/Analysis stops after first problem)
- HTML
- HTML without images
- XML
- MHT

### Report language

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You can define your desired report language. Currently available are:

- English
- German
- Japanese
- French
- Spanish
- Italian

### Additional profile

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You can also pick an additional profile for your custom checks from your file system. Just select the desired profile for processing from your file system by clicking the "Choose..." button. Profiles can be created or adapted with the pdfaPilot Plug-In for Acrobat or Standalone version and can contain checks as well as corrections to be executed on the PDF files.

Corrections contained in an additional profile will not be executed in pdfaPilot Server. Profiles are stored as .kfp or .kfpX files.

### Font embedding

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If a font is not embedded in a PDF file that should be converted to PDF/A pdfaPilot Server will search the system font directories in order to find the needed font file, which are:

Windows:	C:\Windows\Fonts
Macintosh:	/Users/<user>/Library/Fonts /Library/Fonts /System/Library/Fonts
Linux, Solaris Sparc, Solaris x86, AIX:	/usr/lib/X11/fonts /<user home>/.fonts

Additionally the font folder installed together with pdfaPilot Server will be searched. This folder lies in "*callas pdfaPilot Server directory*>|cli|etc|APDFL|Resource|Font".

Besides that you can select your own font folder that should be scanned for fonts by clicking on "Choose" for "Additional Font Folder".

You can further decide if font substitution should be performed for missing fonts.

### Substitute fonts

Font substitution can be used when the original fonts used in a PDF file are not available. By default, the font substitution file *pdfa.cfg* stored in "*cli|etc|FontSubstitution*" provides the basis for substitution.

The following notations are allowed in the fontsubstitution configuration:

#### SubstituteAll

Each font can be substituted by every other font of the entry.

```
SubstituteAll<tab>fontname<tab>fontname<tab>fontname...
```

#### SubstituteFirst

Only the first font of the entry can be substituted by the following fonts.

```
SubstituteFirst<tab>font to be substituted<tab>fontname<tab>...
```

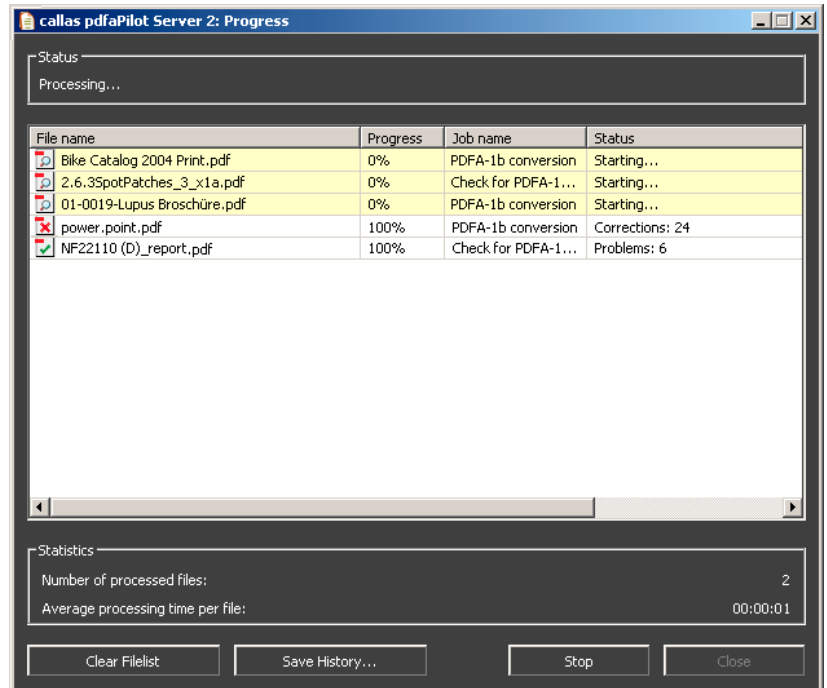
### Additional parameters

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To offer you the full flexibility of the CLI with pdfaPilot Server, you can define your own options in the additional parameter text field. These will be added to the command line call that is executed to perform the job according to the settings. Detailed information about available parameters can be found in the callas pdfaPilot CLI manual.

## Processing

After clicking the "Start" button the progress dialog is opened and the processing is started. As soon as callas pdfaPilot Server finds a PDF file in one of the specified In folders it starts the respective callas module which processes the PDF file. The filelist shows the following information: File name, Progress, Job name, Status, Time and Filesize of the active job.



Using the "Clear Filelist" button causes all entries in the filelist to be removed. The "Save History..." button allows to create a history file containing all entries of the filelist.

Under statistics the total time of processing, the number of processed files and the average processing time per file is displayed.

The "Stop" button at the bottom right allows to stop the processing. It can then be restarted or you can get back to the job administration dialog using the "Close" button.



If you have only batch jobs running, processing will automatically stop when all tasks are finished.

## More Information

If you have any questions or feedback please contact the Product Management at callas software at [support@callassoftware.com](mailto:support@callassoftware.com).

- **Please note:** We provide end user support in English and German language. In case you need a different language consult our *reseller list* at [www.callassoftware.com](http://www.callassoftware.com).

## Performance

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If you want to enhance the performance of your pdfaPilot Server workflow, please keep in mind the following rules:

- Your system font folder will be scanned for missing fonts (see "*Font embedding*"). pdfaPilot will create a font cache to improve the performance time, but still it might be useful to remove fonts that are not needed from this directory.
- Creation of reports takes extra time and therefore should only be chosen if needed.
- Deactivate all jobs which are currently not needed.