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Part I
1 doPDF

1.1 Installing doPDF

1.1.1 System requirements

To install doPDF you need administrator rights and one of the following operating systems:

- Windows 10
- Windows 8/8.1 (64-bit)
- Windows 7
- Windows 7 (64-bit)
- Windows Server 2016
- Windows Server 2012
- Windows 2008 Server R2 (64-bit)
- Windows Vista
- Windows Vista (64-bit)

doPDF requires .NET framework installed (version 4.6). If it's not already installed, it will prompt the installation of .NET during the setup. Installation of doPDF will resume automatically after the framework is installed.

It needs approximately 200MB of free space.

1.1.2 What edition to choose?

There are three licensing options for doPDF: Lite, Standard and Professional.

novaPDF Lite implements the basic functionality of a printer driver, giving users the possibility to create high-quality searchable PDF files from any Windows application.

Main features:

- **PDF Linearization** - this give you the option to create PDF files optimized for loading on webpages (fast web view).
- **PDF/A Compliance**. Creates PDFs compliant with PDF/A-1a and PDF/A-1b specifications.
- **Merge PDF Files**. Append or insert content to an existing PDF file.
- **Document Information**. Include title, author, keywords in your PDF file.
- **PDF Viewer Options**. You can control how the PDF file will be displayed after it’s generated in the default PDF viewer.
- **Custom Save Options**. Configure it to use predefined save settings.
- **After Save Actions**. Custom actions can be defined to be performed after the PDF was successfully generated.
- **Create Private Profiles**. Define different profiles for future use, each with its own printing settings.
- **Import/Export Profiles**. The printing profiles can be exported or imported into different installations.
- **Predefined/Custom Page Sizes**. Choose a default page size (like Letter, Legal, A3, A4, A5, A6, ...) or define your own.
- **Fonts embedding and font subsets embedding** - Fonts (TrueType, OpenType and Type1) can
be embedded in the PDF file to ensure perfect portability.

- **Multi-language support** - choose a language for the user interface
- **Network printer sharing** - can be installed on one computer in a network environment and used by any other computer in that network.
- **Save PDF to Server** - can save the PDF from a client computer directly to the server.
- **Public Profiles** - Define profiles on the server computer and they will automatically be propagated to all client computers.
- **Add-ins for Microsoft Office**. novaPDF installs several add-ins for Microsoft® Office applications (Word, Excel, PowerPoint, Publisher, Visio) that allows one-click conversion to PDF.
- **PDF Bookmarks** - it can detect the headings in the printed document and add bookmarks in the generated PDF files. You have to define the text attributes for the document headings (font, size, style, color) and for the generated bookmarks.
- **Create PDF links** - recognizes links to files and formatted URLs (starting with "http://", "www", "mailto:" or "ftp://") visible in the original document, and creates them in the generated PDF file as links, so they can be opened by clicking them in the PDF viewer.
- **Printer Manager** - Add multiple virtual printers all using the same application driver.
- **Printer Monitor** - Monitor the printing jobs in realtime and filter saved printing logs.

**novaPDF Standard** has all the features of **novaPDF Lite** plus:

- **Graphics options** - You can compress, downsample or convert text and graphics to reduce PDF size.
- **PDF Watermarks** - You can define multiple image watermarks and add them to individual pages or the entire PDF document.
- **Page Left, Right, Top and Bottom Margins** - You can set a margin region that will remain empty when printing.
- **Page zoom (1%-400% zoom factor)** - You can zoom a page if you need advanced settings of how the document should be positioned on the PDF page.
- **Network printer sharing** - can be installed on one computer in a network environment and used by any other computer in that network.
- **Save PDF to Server** - can save the PDF from a client computer directly to the server.
- **Public Profiles** - Define profiles on the server computer and they will automatically be propagated to all client computers.

**novaPDF Professional** has all the features of **novaPDF Standard** plus:

- **Digitally sign PDF files** - you will be able to apply digital signatures to generated PDF files.
- **128 bit/256 bit AES and RC4 encryption** - full 128-bit and 256-bit AES encryption and RC4 is supported by novaPDF Professional and the user is able to control whether the PDF can be viewed, printed, modified, annotated or if it should permit copying/pasting content from it.
- **Send PDF via email** - once created, the PDF file can be automatically sent via email to different recipients, either using the default email client or directly from the application (using SMTP configuration). Additionally you can choose to zip the PDF and send it as attachment.
- **PDF Overlay** - this allows adding the content of the document currently being printed via novaPDF Professional as the background or foreground of an existing PDF file, with options to customize the position of that added content.
- **Network printer sharing** - can be installed on one computer in a network environment and
used by any other computer in that network.

- **Save PDF to Server** - can save the PDF from a client computer directly to the server.
- **Upload PDF to FTP/SFTP** - once the PDF is generated you can upload it (or another file) to an FTP or SFTP server.
- **Public Profiles** - Define profiles on the server computer and they will automatically be propagated to all client computers.

### 1.1.2.1 License types

doPDF offers a wide array of licensing options suitable for anyone, from home users to enterprise entities. These licenses can be fixed based on **Computers / Users** or concurrent like the **Floating User / Floating Computer** licenses.

**Fixed Computer Licenses**

Fixed license activated on the desktop or server and permanently assigned to the Computer that prints to novaPDF (directly, via the shared network printer or remotely). Unlicensed computers are not allowed to print.

**Floating Computer Licenses**

Floating computer license activated on the server assigned temporarily (for 1 hour) to the Computer that prints to novaPDF (directly, via the shared network printer or remotely). Unlicensed computers are not allowed to print.

**Fixed User Licenses**

Fixed user license activated on the server assigned permanently to the Windows User that prints to novaPDF (directly, via the shared network printer or remotely). Unlicensed users are not allowed to print.

**Floating User Licenses**

Floating user license activated on the server assigned temporarily (for 1 hour) to the Windows User that prints to novaPDF (directly, via the shared network printer or remotely). Unlicensed users are not allowed to print.

All editions have both Desktop and Server functionality. doPDF can be used as shared network PDF printer, via Remote Desktop Connection or Terminal Servers only if you own a license for each connecting computer or user that prints to it (directly, via the shared network printer or remotely).

### 1.2 Using doPDF

#### 1.2.1 Introduction

With doPDF you can create PDF files in several ways: using the **doPDF Start page**, the **add-ins for Microsoft Office** or printing directly to the **doPDF driver**.

**DOPDF START PAGE**

This start page can be opened from the program's start group. In Windows 10/8 type **doPDF** on the Start page and click on doPDF from Apps to open it. In Windows 7 or previous go to Start->Programs->doPDF and click on the executable file called doPDF.
The doPDF start page will let you quickly convert a document to PDF by selecting the document and clicking on **Create**. However, it will use the default settings of doPDF to create the PDF file. So, if you need those changed either modify them before creating the PDF or create the PDF by printing it directly to the doPDF printer driver.

Create one document
The **Create one document** tab is selected by default when you first open the application. Using the options here you can convert a single document to PDF at a time. You can read more about the single document conversion here: Create one document

This start page also contains some details on how you can create PDF files. These are only informative and offer the user more information about the other options that can be used to create PDF files.

**ADD-INS FOR MICROSOFT OFFICE**
During installation doPDF gives the option to install add-ins for Microsoft Office applications. By default is checked and it will add in the supported Microsoft Office applications (for now is available in Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Publisher and Microsoft Visio) another tab called novaPDF that will let users create PDF files directly from the Office interface by simply clicking a button.

Using **add-ins for Microsoft Office** to create PDF files - advantages:

- **Converts hidden hyperlinks.** When the Office document contains a hyperlink (clickable text that points to an external site or file) that can be converted to a clickable active link in the resulting PDF document too. The other two methods for creating PDF files with doPDF cannot convert hidden hyperlinks (only visible ones).

- **Easier bookmark conversion.** When converting a document created with Microsoft Word to a PDF using the add-in, you have the option to automatically detect bookmarks and add them in the PDF too. This means that you don't have to define any bookmark rules for the conversion, as needed when printing directly to the printer driver.

Using **add-ins for Microsoft Office** to create PDF files - disadvantages:
• **Office applications only.** The add-ins work only with Microsoft Office applications, so it cannot be used from other applications.

Read more about doPDF add-ins for Microsoft Office on the Create PDF from Microsoft Word, Create PDF from Microsoft Excel, Create PDF from Microsoft PowerPoint, Create PDF from Microsoft Publisher and Create PDF from Microsoft Visio sections.

### DOPDF DRIVER

The previous two options mentioned for creating PDF files rely on the doPDF printer driver, as this is the program that actually does the conversion. doPDF is installed as a virtual printer, so it will be shown as an actual printer in the *Printers* list. This means that you can create PDF files from any application that allows printing if you "print" that document to the doPDF printer driver. This is done in the same way you would print to a regular printer, meaning you have to open the document, go to *File->Print*, select doPDF as the printer and then click on *Print*.

Using doPDF printer driver - advantages:

• **Converts to PDF from any applications.** It will let you convert to PDF any type of document that supports printing. The conversion is done in the same way you would print to a regular printer, just that instead of the regular printer you'll have to select the doPDF printer driver.

Using doPDF printer driver disadvantages:

• **Convert hidden hyperlinks.** It can convert only visible links in the PDF document (i.e. www.novapdf.com will be converted, but not novapdf.com), unlike the doPDF add-ins for Microsoft
Office (which can convert hidden hyperlinks too).
Read more about doPDF printer driver on the Create PDF from any application section.

1.2.2 Getting Started

1.2.2.1 Create one document

The Create one document tab is selected by default when you first open the application. Using the options here you can convert a single document to PDF at a time.

The Create one document tab is selected by default when you first open the application. Using the options here you can convert a single document to PDF at a time.

To convert a file to PDF in the Select file field enter the path to the document you want converted into PDF or use the Browse button to select it. Once you selected the document click on the Create button. This will start the application associated with the document you selected and will ask you where to save the PDF file.

This start page also contains some details on how you can create PDF files. These are only informative and offer the user more information about the other options that can be used to create
Using doPDF start page to create PDF files - advantages:

- **Quick access.** The start page is quickly accessible from the doPDF start menu group. Simply type for doPDF in Windows 8's Start page and click on doPDF from the Apps results, or click on the Windows button, go to Start->Programs->doPDF group and click on the executable file in Windows 7 or previous. This will launch the start page and let you select a document to convert to PDF.

Using doPDF start page to create PDF files - disadvantages:

- **Difficult to change preferences.** The start page is meant for quick access to convert a document. Thus it will use the default settings of the doPDF printer for creating the PDF files. In order to use custom settings, you'll have to change those before the printing.
- **Convert hidden hyperlinks.** It can convert only visible links in the PDF document (i.e. www.novapdf.com will be converted, but not novapdf.com), unlike the doPDF add-ins for Microsoft Office (which can convert hidden hyperlinks too).

### 1.2.2.2 Tools

The Tools section gives you quick access to print one/multiple documents, manage the printers, monitor printing progress, check for updates, change language and password protect the interface.
Getting started
Shows shortcuts to go to the printing documents tab (you can also click on the tabs to visit those sections).

Tools
From this section you can set the user interface Language and configure the frequency of Updates.

1.2.2.1 Language

The Language page allows you to set the language for the interface of the program.
LANGUAGE

Use user's regional settings
If you check this option, the language will be automatically selected depending on each user's regional setting. If the user language is not available in doPDF, the default language is chosen (English).

Select Language
If you want all users to use the same language, select one of the languages available from the Select language combo-box.

TRANSLATOR
For each language you'll see here details regarding the person/company that translated the interface of doPDF.

1.2.2.2 Updates
The Updates window allows you to set how often to check for updates and to disable it.
CHECK FOR UPDATES

Automatic check for updates
This option is checked by default and will connect to the Internet to see if there are new updates for the application with the defined frequency. If you uncheck this option you won't be notified of new updates until you check manually by clicking on the Start check for updates button.

Frequency
You can choose to check for updates Daily (not recommended), Weekly (default value) or Monthly. When an update is found it will display the doPDF Updates window with details about the update.

DOPDF UPDATES

Version history
If updates are detected you'll see a list of fixes, updates and new features in the version history section, grouped by version and build number. You can start the download of the new version by accessing the Click to download link.

News
Occasionally we will post news items that will show in the update window. When this window is opened you can re-check for updates by clicking on the Refresh button.

1.2.2.3 About

The About page contains information about the version you have installed plus the option to access the licensing information.
The about window will show the following information:

- Version and build number of the profile manager and printer manager, in parenthesis you'll also the the version of the printer driver used
- Windows version and edition (for support inquiry purposes)
- Miscellaneous information regarding the other products developed by the company as well as copyright information

1.2.3 Create PDF from any application

Creating PDF Files

doPDF installs itself as a virtual printer driver. To create PDF files from any application, you just have to print your documents to the doPDF like you would print to a normal printer, or you can start the doPDF Start page from the program group, Browse for the document you want to convert and press Create.

HOW TO CREATE PDF FILES FROM DOCUMENTS CREATED WITH MICROSOFT WORD
During installation, doPDF will ask if you want to install an add-in for Microsoft Office. With that add-in installed, you can create PDF files from any Office application without having to go to File->Print. You just have to click on the doPDF tab, and then on the Save as PDF button to create the PDF file.

However, if you chose not to install the add-in, you can still create PDF files from all Microsoft Office applications, but in the general form that of printing to it like to a regular printing. To create PDF files from documents created with Microsoft Word (without using the add-in), follow these steps:

1. Open the document that you want to convert to a PDF file
2. Go to File->Print and select doPDF from the printers combo-box
3. Click on Print and choose a location for your PDF file

HOW TO CREATE PDF FILES FROM MICROSOFT WORDPAD

1. Open the document that you want to convert to a PDF file
2. Go to File->Print, click Print and select doPDF from the list of printers
3. Click on Print and choose a location for your PDF file
HOW TO CREATE PDF FILES FROM NOTEPAD

1. **Open** the NotePad document that you want to convert to a PDF file
2. Go to **File->Print** and select **doPDF** from the list of printers
3. Click on **Print** and choose a location for your PDF file
Printing a test page
After installation you can test if doPDF is working properly by printing a test page.

To print a test page in Windows 10/8:
1. Go to Start, type printers and open from the Settings results Devices and Printers
2. In the Printers section, right-click doPDF and select Printer Properties
3. In the doPDF Printer Properties window, click on Print Test Page
4. You will be prompted to select a location and name for the test PDF file. Choose one and click Save.
5. After the PDF was created and saved, it will open in your default PDF reader and you will see the printed test page.

To print a test page in Windows 7:
6. Go to Start and click on Devices and Printers
7. In the Printers window, right-click doPDF and select Printer Properties
8. In the doPDF Printer Properties window, click on Print Test Page
9. You will be prompted to select a location and name for the test PDF file. Choose one and click Save.
10. After the PDF was created and saved, it will open in your default PDF reader and you will see the printed test page.

To print a test page in Windows Vista, XP or Windows 2003 Server:
1. Go to Start and click on Printers and Faxes (if you have the Classic menu go to Start->Settings->Printers and Faxes)
2. In the Printers and Faxes window, right-click doPDF and select Properties
3. In the doPDF Properties window, click on Print Test Page
4. You will be prompted to select a location and name for the test PDF file. Choose one and click Save.
5. After the PDF was created and saved, it will open in your default PDF reader and you will see the printed test page.

Accessing the doPDF Printing Preferences
You can access the Printing Preferences window and change the various settings available.

To access the doPDF Printing Preferences window in Windows 10/8:
1. Go to Start, type printers and open from the Settings results Devices and Printers
2. In the Printers section, right-click doPDF and select Printing Preferences
3. doPDF Printing Preferences window will be displayed and you will have the option to change the various settings available

To access the doPDF Printing Preferences window in Windows 7, Vista, XP and Windows 2003 Server:
1. Go to Start and click on Printers
2. In the Printers window, right-click doPDF and select Printing Preferences
3. doPDF Printing Preferences window will be displayed and you will have the option to change the various settings available

To access the doPDF Printing Preferences window in Windows 2000:
1. Go to Start and click on Printers
2. In the Printers window, right-click doPDF and select Printing Preferences
3. doPDF Printing Preferences window will be displayed and you will have the option to change the various settings available

1.2.3.1 Save PDF file
This window lets you choose where to save the PDF file, whether to remember the folder you saved it in for the future or not, to embed or not the used fonts and choose the quality of the images in the resulting PDF.
File selection/name
Enter a filename (including its path) for the PDF that will be generated, or use the Browse button to select a location for it. Once the location is selected, click OK to actually create and save the PDF.

PDF OPTIONS
Choose a the printing quality for the resulting PDF. The Smallest file will result in creating a PDF with a small size, while the Best quality will create one with better image quality.

Best quality
If this option is checked the resulting PDF file will be larger than by using the Small file option, however the quality of the images will be better. This option is recommended if you need a PDF file that's suitable for printing, where the quality of images is important. If you need a PDF file to put on the web or to send via email, you should use the Small file option to reduce its size.

Medium
You can choose this option if you want a balance between the quality of the resulting PDF and its size.

Smallest file
This option is checked by default and the compression engine used in this case optimizes the
resulting size of the PDF file. This option is recommended in most cases when you need to send the resulting PDF file via email, put it on the web or use it for distribution. It's a balance between size of the resulting PDF file and the quality of images, so if you need to have higher quality images in the resulting PDF files select the **Best quality** option.

**Embed all used fonts**
If this option is checked, the fonts used in the original document will be embedded in the PDF file. While this ensures you that the recipient will see the PDF with the same fonts used in the original document, it also has the disadvantage that the filesize of the resulting PDF is larger than without using the Embed fonts option. Only the characters used in the original document will be embedded, to avoid having unnecessary font characters included (doPDF does font subset embedding).

**PREFERENCES**

**Add document info**
If this option is checked, the resulting PDF file will have the metadata information that you set in Document info (title, subject, keywords, author, creator).

**Always use this folder**
If you check this option, the path where you will save the PDF will be remembered and offered as a default saving location the next time you will save a PDF. By default this is unchecked.

**ACTIONS**

**Open file**
If this option is checked, the resulting PDF file will be opened in the default PDF reader. If you don’t want to see the resulting PDF file automatically, uncheck it and click OK.

The resulting PDF will be opened automatically with the default PDF viewer (i.e. Adobe Reader). The PDF will be displayed according to the PDF view options set by default in your viewer. If you want to display the PDF in a different view (i.e. Single Page Continuous which allows scrolling pages, or Two Pages side by side) you'll have to go into preferences/options for the PDF viewer and change the default viewing options.

**1.2.3.1.1 Document info**

The *Document Info* allows you to define what metadata information gets saved in the resulting PDF file. This information will be displayed in the properties of the PDF.
Title
Sets the title for the printed document. Default is empty. This title will only show up when viewing the properties of the resulting PDF, only changes in the document metadata.

Subject
Sets the subject for the printed document. Just as the Title, it will only show up in the metadata properties for the document. Default is empty.

Keywords
Sets the keywords for the printed document as it will be displayed in the document properties. Default is empty.

Author
Sets the author of the printed document as it will be displayed in the document properties.

Creator
By default it shows information about the application that generated the PDF file, however this field can be modified to any custom value.
1.3 Configuring doPDF

1.3.1 Printing Preferences

1.3.1.1 Settings

The main page of the Printing Preferences window allows you to set basic options for the resulting PDF:

- select the page size (i.e. A4, Letter)
- choose a different orientation (portrait, landscape)
- create multiple copies of the same document
- set resolution for images or scale the entire page

PAGE SIZE

This group allows you to modify the size of the resulting PDF document. You can select a predefined
form from the drop down list.

You can also select **Custom** and enter your own **Width**, **Height** and **Unit** for the current conversion.

**ORIENTATION**
Specifies how the page is positioned. Available options are **Portrait** and **Landscape**. The orientation can also be set from the printing application.

**Portrait**
Portrait orients the print vertically (longest edge of the page is vertical).

**Landscape**
Landscape orients the print horizontally (longest edge of the page is horizontal).

**COPIES**
Specifies how many copies of the original document you want to include into the PDF and if you want the pages collated.

**Collate**
If you need multiple copies of the original document in the PDF you can set here if you want the pages collated (ordered as P1-P2-P3-P1-P2-P3) or grouped (ordered as P1-P1-P2-P2-P3-P3).

**GRAPHIC**
Specifies the resolution and scale of the document.

**Resolution**
You can set the printing resolution between 72 and 2400 dpi by selecting the default values from the drop down list or entering a different value. A smaller resolution results in smaller PDF file, but lower image quality, while a higher resolution means better image quality, but bigger PDF file. The default value is 300 dpi. The resolution can also be set from the printing application.

**Scale**
You can set the scale of the document from 1% to 400% by entering a value or pressing the Up and Down arrows. The scale factor can also be set from the printing application.

**NOTE**
Some applications allow you to set page size, orientation, number of copies, scale and resolution from their own printing dialogs. If you open the doPDF Printing Preferences dialog from the printing application, you will see these settings are automatically updated on the first page.

### 1.3.1.2 Tools

The Tools section gives you quick access to print one/multiple documents, manage the printers, monitor printing progress, check for updates, change language and password protect the interface.
Getting started
Shows shortcuts to go to the printing documents tab (you can also click on the tabs to visit those sections).

Tools
From this section you can set the user interface Language and configure the frequency of Updates.

1.3.1.2.1 Language
The Language page allows you to set the language for the interface of the program.
LANGUAGE

Use user's regional settings
If you check this option, the language will be automatically selected depending on each user's regional setting. If the user language is not available in doPDF, the default language is chosen (English).

Select Language
If you want all users to use the same language, select one of the languages available from the Select language combo-box.

TRANSLATOR
For each language you'll see here details regarding the person/company that translated the interface of doPDF.

1.3.1.2.2 Updates
The Updates window allows you to set how often to check for updates and to disable it.
CHECK FOR UPDATES

Automatic check for updates
This option is checked by default and will connect to the Internet to see if there are new updates for the application with the defined frequency. If you uncheck this option you won't be notified of new updates until you check manually by clicking on the Start check for updates button.

Frequency
You can choose to check for updates Daily (not recommended), Weekly (default value) or Monthly. When an update is found it will display the doPDF Updates window with details about the update.

DOPDF UPDATES

Version history
If updates are detected you'll see a list of fixes, updates and new features in the version history section, grouped by version and build number. You can start the download of the new version by accessing the Click to download link.

News
Occasionally we will post news items that will show in the update window. When this window is opened you can re-check for updates by clicking on the Refresh button.

1.3.1.3 About
The About page of the Printing Preferences contains information about the version you have installed as well as information about other projects developed by Softland, link to change the Language and Check for updates.
1.3.2 Printer Manager

1.3.2.1 Licensing

This will allow you to manage the licenses for the printer currently selected. Managing licenses is useful when using the current printer as a print server to add/remove/license and un-license client computers.
Licensing information
This section shows information about the licensing status. It will display the product name and version, quantity, type of license (permanent/trial), activation status and activation details (name, company, email, comment, ...). For trial versions it will display how many days you have before the trial expires.

Manage licenses
This allows you to manage the licenses for the installed printer driver. Managing licenses is useful when using the installed printer driver as a print server (via the shared network printer or remotely) to add, license, un-license computers/users, and release licenses. See the Manage licenses section for details.

From this window you can also access the Activation section to activate/deactivate your license.

1.3.2.1.1 Manage licenses
This allows you to manage the licenses for the installed printer driver. Managing licenses is useful when using the installed printer driver as a print server (via the shared network printer or remotely) to add, license, un-license computers/users, and release licenses.
You can share a PDF printer to be accessible via other computers in the same network. If a print job is started from a computer in the network through the print server, the computer/user name is occupies automatically a license, as long as there are available licenses. If you have enough licenses, you don't have to configure anything, all computers/users will be automatically licensed when they initiate their first print job on the printer server. As the computers/users are being assigned a license, you will see the number of Available licenses decreasing, and the licensed status Yes near the name of the licensed computers/users.

The computers/users are automatically added in the license list even when the server is not licensed (in trial mode). In this case all computers will be listed as unlicensed. When the server is licensed, the computers/users in the list are licensed automatically as they print. If you have more computers/users in the list then the number of licenses, the computers/users that will not be able to secure a license.

You can see the number of the current available licenses in the lower right-hand part under the Available licenses text. If you wish, you can manage the licensed computers/users manually. You can Add licenses for the computers/users that connect via the shared network printer or remotely. By clicking on a computer/user from the list you will also be able to License, Unlicense or Release them (you'll see how the status from the Licensed column will change to Yes, No or -).

Depending on your network configuration, you can choose what machine names to use for licensing: NetBIOS names or DNS names. You can switch at any time between NetBIOS and DNS names. Just remember that if you already have machines licensed with one name they will not be recognized with the other name. You will have Unlicense all computers/users from the licensed list which became obsolete. The licenses made available will be reused by the new computers/users when they first print.

For floating computer/user licenses you can also control how long the license will be occupied by the computer/user. The minimum is 1h, but you can increase this period or set the license to be occupied permanently. Press the Apply button to make the changes or the Reset button to reset all the changes to the default 1h.

1.3.3 Profile Manager

The Profile Manager allows you to manage profiles (new, copy, edit, delete), their individual settings and access profile presets. Profiles are a set of configurations that will be used when creating the PDF file. As an example you can create different printing profiles based on what the output should be: a profile that outputs PDF documents intended for distribution, or another one for high quality PDF files printing, PDFs for review, marked confidential, ....

You can open Profile Manager as an administrator or as a regular user:

- to open Profile Manager as an administrator, open Printer Manager (go to Start and type "printer manager") then Profiles->Manage Profiles. If you set an administrator password, you'll be required to enter it to make changes.
- to open Profile Manager as a regular user, open Devices and Printers (go to Start and type "devices and printers"), right click on doPDF and select Printing Preferences. Click on the Manager Profiles button.

Opening Profile Manager as an administrator gives you access to more options than when opening it as a regular user.
PROFILES LIST

When the doPDF is installed, a default profile is created. This profile uses its own default printing settings to create the PDF files.

However you can change those settings and create a custom profile, that when used, will create PDFs using the options you've chosen. In doPDF there are two types of profiles, private and public:

1. **Private profiles.** A private profile is visible only to the current user. By default new profiles are created as private and only the users from the computer where it was created will be able to see it and create PDFs using it.

2. **Public profiles.** Public profiles are visible from all client computers (or other users on the same computer) that connect to and print via the computer where they are defined (the printer server). When a public profile will be used, all the settings from that profile will be propagated to the client computers.

This list shows the profiles (both private and public) that were defined. The icon on the right of the profile name shows what type of profile it is (public or private). You can filter the shown profiles by starting to type in the search field and also use the Public/Private checkboxes to filter them by type.

MANAGE PROFILES

**New**
This will create a new profile based on the default one. You can change its settings by clicking on the different tabs available (General, Emails, ...) and use the Save button to record your changes and create the profile. It is created only after you click on the Save button, if you click on Cancel or select a different profile the current one will be discarded.

**Copy**
This allows you to duplicate an existing profile. To do so, just select an existing profile and click on Copy. Unlike the New option, when you copy an existing profile the duplicate is automatically saved with a different name (original name of the profile plus the word Copy). Removing the original profile doesn't affect in any way the existing copy of it.

**Delete**
Deletes the profile selected in the profiles list. You cannot delete the current active profile. You have to set another profile as active profile first. There will always be at least one profile.

**Set active**
Set the profile selected in the profiles list as current active profile. The active profile settings will be used in the subsequent printing jobs. Optionally you can check the Show Select Profiles dialog to show a prompt on each print job that will let you choose what profile you want to use for printing.

**Show Select Profiles dialog**
If this option is checked, before creating the PDF file from a document a window will prompt you to choose which profile to use for that printing job.

**Advanced**
When you click on the Advanced settings icon (grey gear on the right), you will see additional options:

- **Delete my profiles** - if you click on this you'll get a confirmation window that lets you choose if you want to delete all your defined profiles (the private profiles). Once the profiles are deleted, they cannot be recovered anymore.
- **Delete all profiles** - this will prompt a confirmation window to remove all the existing profiles (both private and public).

You can also click on the question mark to access the *About* window or open the *Help* file.

**PROFILE SETTINGS**

The profile settings group allows you to customize the current profile and change various options such as the possibility to send emails, add watermarks/bookmarks/overlays, protect the PDF, embed fonts and many others. You can visit each tab and change the options for:

1. General - this lets you select the profile type, describe it, set the PDF version, enable PDF linearization, set file saving options and after save actions.
2. Info - you can add document information (subject, author, keywords) and set PDF viewer options.
3. Fonts - this lets you embed all fonts, only subsets, protected fonts or disable embedding.
4. Graphics - you can compress the content, convert or downsample images to reduce the size of the resulting PDF.
5. Bookmarks - predefined bookmark configurations can be used or customized.
6. Security - you can password-protect a PDF document to restrict printing, copying or even opening it.
7. Other - this lets you customize the active PDF links in the resulting file and also set advanced options (such as text optimization).
8. Layout: watermarks, overlays and signatures - in the Layout section you can choose display options for the resulting PDF. You can use predefined forms (or add a custom ones), page orientation (portrait/landscape), add text/image watermarks, overlays or digitally sign the PDF.
9. Actions, email, upload - you can opt to send emails after a PDF is created, customize the recipients/email templates and define the SMTP server connections.

Each of the profile setting changes you modify will be available for the currently selected profile. You have to click on the **Save** button when you finish modifying the settings, or on **Cancel** if you wish to discard them all.

**PROFILE SETTINGS PRESETS**

Each of the profile settings tabs uses predefined configurations for certain sections. You can modify those presets either from the profile setting tab or open the separate preset window for each individual set of options. To do so, click on the right arrow next to the Profile text field (top-right corner of the Profile Manager window). This will show a drop-down list of all the profile settings presets that you can modify individually.

Each preset created for profile settings will show up on the main tab and available as a drop-down option. For example, the presets that you create for the Save section, will show up as a drop-down...
in General -> File saving options -> Save options. Each preset section has already defined default preset profiles, which cannot be modified. If you want to create a preset based on the default one, you can use the Copy option and Save it after you’ve done the necessary changes.

The navigation arrows (left/right) next to the Profile field allow you to browse between a preset profile window and the main profile settings window. You can read more about the presets in the Manage Presets help section.

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

1.3.3.1 Other

The Other profile manager tab allows you to choose predefined link detection and advanced presets or customize those to enable active PDF links in the resulting PDF file (with various styling options) and do optimizations. You can also define user tags to be used in the PDF document and create custom save rules.

Detect links
If this option is checked, it will allow you to enable automatic detection of visible links in text (both local and remote links) and customize the links' appearance in the resulting PDF file. In order to be detected and converted, the URLs must be visible in the original document and formatted to start with: "http://", "www", "mailto:", "ftp://" (unless when printing via the add-in for Microsoft Office that is able to detect hidden links too). By default a link detection preset is selected but you can manage the existing presets if you click on New/Manage. For detailed explanation of each link detection options see the Link formatting section.

Advanced
You can set some advanced options regarding how the printed documents will be processed and saved as a PDFs. By default an advanced preset is selected but you can manage the existing presets if you click on New/Manage. For detailed explanation of each of the advanced options see the Advanced options section.

Add user tags
You can define pairs of tag/value to be detected before the PDF is generated. doPDF can then detect those tags from the original document and allows you to use those values as Macro names. It can also remove the whole page where a particular tag/value is present or removing only some parts of the text based on font formatting.

Example:
- Your original document (before sending it to doPDF for converting) has the text MyTag=sales@novapdf.com
- You define in doPDF - Profile Manager - Other - User tags the tag MyTag
- After it’s defined, you can use it as a macro value by entering it in this format [K:MyTag]
- You can add an action to email the PDF and in the TO field you can enter the macro value [K:MyTag] - this will generate the PDF and send it afterwise to the sales@novapdf.com email address
Optionally you can configure the application to remove that text when generating the PDF or the entire page where that text is present.

By default an **Email user tags** preset is defined and can be selected, but you can manage the existing presets if you click on *New/Manage*. For detailed explanation of each of the advanced options see the User tags section.

**Add save rules**

You can configure file saving rules that will modify the resulting filename of the PDF file. Some applications (i.e. Crystal Reports) will add by default their own name to the filename of an unsaved document, the result being (in the case of Crystal Reports) Crystal Reports – Document1.rpt. That's why you can define your own save rule that will remove the application name from the filename.

Save rules can use regular expressions to alter filenames, and by default there is a preset included as an example. You can define your own preset if you click on *New/Manage*. For detailed explanation see the Save rules section.

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

**1.3.3.1.1 User tags**

The **User tags** section is embedded in the *Other* tab of the *Profile Manager* and allows you to set some advanced options regarding how the user tags will be processed.

**USER TAGS**

This group allows you to choose a predefined preset for user tags or use a custom one. By default there are several predefined advanced presets defined but you can add new or manage those by clicking on *New/Manage*. You can read more about predefined user tags presets in the *Manage Presets -* > *User tags* help section. A predefined user tags preset can be used by multiple profiles, while *Custom* settings only affect the current profile.

You can define pairs of tag/value to be detected before the PDF is generated. doPDF can then detect those tags from the original document and allows you to use those values as Macro names.

Here’s an example on how you can use user tags to send a particular document to the Sales department via email:

- Your original document (before sending it to doPDF for converting) has the text `MyTag=sales@novapdf.com`
- You define in *doPDF - Profile Manager - Other - User tags* the tag `MyTag`
- After it's defined, you can use it as a macro value by entering it in this format `[K:MyTag]`
- You can add an action to email the PDF and in the TO field you can enter the macro value `[K:MyTag]` - this will generate the PDF and send it afterwise to the sales@novapdf.com email address
- Optionally you can configure the application to remove that text when generating the PDF or the entire page where that text is present

**Add/Copy/Remove/Up/Down**

Click on *Add* and then the *Tag/Default value* fields will be enabled for you to enter the new user tag
pair. You can define multiple user tags and only enable a few for the current profile. The application will search the document for the user tag value in the order that they are defined in this list. You can re-order them using the Up/Down buttons and Remove the ones you don't want to use anymore. The Default value field can be empty, however you can enter a value to replace with if the original document has the tag but without a value.

IMPORTANT:
In order to use the defined user tag as a Macro value, you will have to enter it in the field in this format \[K:MyTag\]
In this example, the name of the user tag is MyTag.

REMOVE USER TAGS POLICY

Do not remove anything
By default, doPDF will convert the original document sent to it exactly as it comes without altering its content. Even if it detects user tags in the document, it will leave the content unchanged.

Remove pages with tags
If this option is selected and the application detects user tags in the document, it will exclude the pages that contain user tags from the original document when creating the PDF file.

Remove all text with specific font
doPDF cannot remove the user tag (and its value) when converting the original document into PDF solely based on its content. If user tags are present in the original document and you don't want those included in the resulting PDF, you can style its font/size/color in a particular way so that doPDF can detect it. Simply enable the Remove all text with specific font option here and then choose exactly the same font, size, style (bold/italic) and color as it is in the original document.

IMPORTANT: If this option is checked, doPDF will remove any content that matches the formatting specified by you, not only user tags.

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

1.3.3.1.2 Save rules

The Save rules section is embedded in the Other tab of the Profile Manager and allows you to define and use advanced filename/path saving rules.

SAVE RULES
This group allows you to choose a predefined preset for save rules or use a custom one. By default there are several predefined save rules presets defined, but you can add new or manage those by clicking on New/Manage. You can read more about predefined save rules presets in the Manage Presets->Save Rules help section. A predefined user tags preset can be used by multiple profiles, while Custom settings only affect the current profile.
Save rules
Save rules can be used to modify the filename of generated PDF files in certain situations. For example, if you try to print to PDF an unsaved Notepad document the default filename will be "Untitled - Notepad.pdf". One of the default save rules included automatically removes the second part so the filename will be "Untitled.pdf". Custom save rules can be defined only for removing parts of a filename/path, you cannot use those to add/replace. You can Add a rule by providing a Name/Description and

Add rules
You can add a new save rule by clicking on Add or Copy an existing one. Save rules are interpreted in the order they are defined, so you can use the Up/Down options to re-order the existing rules. When adding a new save rule you will have to provide:

- **Name** - this is the name of the rule, it doesn't affect the name of the document
- **Remove** - save rules only remove parts of the filename, based on what you select:
  - **Front** - this will remove the matching Text only if it's at the front of the filename
  - **End** - this will remove the matching Text only if it's at the end of the filename
  - **All** - this will remove the matching text completely
  - **Expression** - the information used in the Text field will be interpreted as a regular expression
- **Text** - this is where you have to enter the text or regular expression you want to be used for the filename
- **Format** - only regular expression formats will be accepted here. For example \1 is interpreted as the contents of group 1, \2 is interpreted as the contents of group 2 and so on
- **Description** - add more info about the rule you are adding

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

### 1.3.3.2 Manage Presets

#### 1.3.3.2.1 Other

#### 1.3.3.2.1.1 User tags

The *User tags* presets section allows you to manage the existing default presets or add new ones. These presets let you configure which user tags will be detected from the original document and what to do with their values. A preset can be used by multiple printing profiles and whenever a preset is updated, it will be modified automatically in all profiles that use it.

**MANAGE PRESETS**

**New**
This will create a new preset based on the default one. You can change its settings and use the *Save* button to record your changes and create the preset. It is created only after you click on the *Save* button, if you click on *Cancel* or select a different preset the current one will be discarded.
Copy
This allows you to duplicate an existing preset. To do so, just select an existing preset and click on Copy. Unlike the New option, when you copy an existing preset the duplicate is automatically saved with a different name (original name of the preset plus the word Copy). Removing the original preset doesn’t affect in any way the existing copy of it.

Delete
Deletes the preset selected from the list of presets. You cannot delete the default presets that are included in the application.

Browse
You can use the left/right arrows in the top-right section of the window to navigate back to the profile manager page or forward to the preset window. You can also access quickly the presets by clicking on the Profile text next to the navigational arrows and selecting the preset section you want to read more about.

PRESETS LIST
When the doPDF is installed, a default set of presets is included for each section that uses presets. These presets have predetermined unchangeable settings that are taken into consideration when creating the PDF files.
However you can create custom presets based on the default ones that when used, will create PDFs using the options you’ve chosen. In doPDF there are two types of presets, private and public:

1. Private presets. A private preset is visible only to the current user. By default new presets are created as private and only the users from the computer where it was created will be able to see it and use that preset in their profiles.

2. Public presets. Public presets are visible from all client computers (or other users on the same computer) that connect to and print via the computer where they are defined (the printer server). When a public preset will be used, all the settings from that preset will be propagated to the client computers.

This list shows the presets (both private and public) that were defined. The icon on the right of the preset name shows what type of it is (public or private). You can filter the shown profiles by starting to type in the search field and also use the Public/Private checkboxes to filter them by type.

DEFAULT PRESETS
The default link presets are automatically included in the application and available right after installation. These are presets created based on the most used scenarios for this section.

Email user tags
When this preset is used, the application will detect 5 user tags from the original document that can be used as macros when sending an email: MyEmailAddress, MyEmailCC, MyEmailBCC, MyEmailSubject, MyEmailBody. If any of these tags are present in the original document (that you are converting to PDF), the application will extract its value and that can be used as a macro value in the resulting PDF. For example you can extract the value of MyEmailAddress and have an email sent automatically with the generated PDF to that address. This preset does not remove user tags included in the original document.
No user tags
This preset does not detect User tags from the original document.

USER TAGS
You can define pairs of tag/value to be detected before the PDF is generated. doPDF can then detect those tags from the original document and allows you to use those values as Macro names. Here's an example on how you can use user tags to send a particular document to the Sales department via email:
- Your original document (before sending it to doPDF for converting) has the text MyTag=sales@novapdf.com
- You define in doPDF - Profile Manager - Other - User tags the tag MyTag
- After it's defined, you can use it as a macro value by entering it in this format [K:MyTag]
- You can add an action to email the PDF and in the TO field you can enter the macro value [K:MyTag] - this will generate the PDF and send it afterwise to the sales@novapdf.com email address
- Optionally you can configure the application to remove that text when generating the PDF or the entire page where that text is present

Add/Copy/Remove/Up/Down
Click on Add and then the Tag/Default value fields will be enabled for you to enter the new user tag pair. You can define multiple user tags and only enable a few for the current profile. The application will search the document for the user tag value in the order that they are defined in this list. You can re-order them using the Up/Down buttons and Remove the ones you don't want to use anymore. The Default value field can be empty, however you can enter a value to replace with if the original document has the tag but without a value.

IMPORTANT:
In order to use the defined user tag as a Macro value, you will have to enter it in the field in this format [K:MyTag]
In this example, the name of the user tag is MyTag.

REMOVE USER TAGS POLICY

Do not remove anything
By default, doPDF will convert the original document sent to it exactly as it comes without altering its content. Even if it detects user tags in the document, it will leave the content unchanged.

Remove pages with tags
If this option is selected and the application detects user tags in the document, it will exclude the pages that contain user tags from the original document when creating the PDF file.

Remove all text with specific font
doPDF cannot remove the user tag (and its value) when converting the original document into PDF solely based on its content. If user tags are present in the original document and you don't want those included in the resulting PDF, you can style its font/size/color in a particular way so that
doPDF can detect it. Simply enable the *Remove all text with specific font* option here and then choose exactly the same font, size, style (bold/italic) and color as it is in the original document.

**IMPORTANT:** If this option is checked, doPDF will remove any content that matches the formatting specified by you, not only user tags.

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

### 1.3.3.2.1.2 Save rules

The *Save rules* presets section allows you to manage the existing default presets or add new ones. These presets let you define and use advanced filename/path saving rules. A preset can be used by multiple printing profiles and whenever a preset is updated, it will be modified automatically in all profiles that use it.

#### MANAGE PRESETS

**New**
This will create a new preset based on the default one. You can change its settings and use the *Save* button to record your changes and create the preset. It is created only after you click on the *Save* button, if you click on *Cancel* or select a different preset the current one will be discarded.

**Copy**
This allows you to duplicate an existing preset. To do so, just select an existing preset and click on *Copy*. Unlike the *New* option, when you copy an existing preset the duplicate is automatically saved with a different name (original name of the preset plus the word *Copy*). Removing the original preset doesn't affect in any way the existing copy of it.

**Delete**
Deletes the preset selected from the list of presets. You cannot delete the default presets that are included in the application.

**Browse**
You can use the left/right arrows in the top-right section of the window to navigate back to the profile manager page or forward to the preset window. You can also access quickly the presets by clicking on the Profile text next to the navigational arrows and selecting the preset section you want to read more about.

#### PRESETS LIST

When the doPDF is installed, a default set of presets is included for each section that uses presets. These presets have predetermined unchangeable settings that are taken into consideration when creating the PDF files.

However you can create custom presets based on the default ones that when used, will create PDFs using the options you've chosen. In doPDF there are two types of presets, private and public:
1. **Private presets.** A private preset is visible only to the current user. By default, new presets are created as private and only the users from the computer where it was created will be able to see it and use that preset in their profiles.

2. **Public presets.** Public presets are visible from all client computers (or other users on the same computer) that connect to and print via the computer where they are defined (the printer server). When a public preset will be used, all the settings from that preset will be propagated to the client computers.

This list shows the presets (both private and public) that were defined. The icon on the right of the preset name shows what type of it is (public or private). You can filter the shown profiles by starting to type in the search field and also use the Public/Private checkboxes to filter them by type.

**DEFAULT PRESETS**

The default link presets are automatically included in the application and available right after installation. These are presets created based on the most used scenarios for this section.

**Regular expressions**

This preset includes 14 save rules that use regular expressions to detect certain text/path characters and remove or replace those.

**SAVE RULES**

**Save rules**

Save rules can be used to modify the filename of generated PDF files in certain situations. For example, if you try to print to PDF an unsaved Notepad document the default filename will be "Untitled - Notepad.pdf". One of the default save rules included automatically removes the second part so the filename will be "Untitled.pdf". Custom save rules can be defined only for removing parts of a filename/path, you cannot use those to add/replace. You can Add a rule by providing a Name/Description and

**Add rules**

You can add a new save rule by clicking on Add or Copy an existing one. Save rules are interpreted in the order they are defined, so you can use the Up/Down options to re-order the existing rules. When adding a new save rule you will have to provide:

- **Name** - this is the name of the rule, it doesn't affect the name of the document
- **Remove** - save rules only remove parts of the filename, based on what you select:
  - **Front** - this will remove the matching Text only if it's at the front of the filename
  - **End** - this will remove the matching Text only if it's at the end of the filename
  - **All** - this will remove the matching text completely
  - **Expression** - the information used in the Text field will be interpreted as a regular expression
- **Text** - this is where you have to enter the text or regular expression you want to be used for the filename
- **Format** - only regular expression formats will be accepted here. For example \1 is interpreted as the contents of group 1, \2 is interpreted as the contents of group 2 and so on
- **Description**: add more info about the rule you are adding
Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.

1.3.3.2.2 Email

1.3.3.2.2.1 Outlook

The Outlook presets section allows you to use predefined presets for sending out an email with the generated PDF attached via Outlook. These presets allow you to define custom options for sending emails via Outlook. A preset can be used by multiple printing profiles and whenever a preset is updated, it will be modified automatically in all profiles that use it.

MANAGE PRESETS

New
This will create a new preset based on the default one. You can change its settings and use the Save button to record your changes and create the preset. It is created only after you click on the Save button, if you click on Cancel or select a different preset the current one will be discarded.

Copy
This allows you to duplicate an existing preset. To do so, just select an existing preset and click on Copy. Unlike the New option, when you copy an existing preset the duplicate is automatically saved with a different name (original name of the preset plus the word Copy). Removing the original preset doesn't affect in any way the existing copy of it.

Delete
Deletes the preset selected from the list of presets. You cannot delete the default presets that are included in the application.

Browse
You can use the left/right arrows in the top-right section of the window to navigate back to the profile manager page or forward to the preset window. You can also access quickly the presets by clicking on the Profile text next to the navigational arrows and selecting the preset section you want to read more about.

PRESETS LIST

When the doPDF is installed, a default set of presets is included for each section that uses presets. These presets have predetermined unchangeable settings that are taken into consideration when creating the PDF files.

However you can create custom presets based on the default ones that when used, will create PDFs using the options you’ve chosen. In doPDF there are two types of presets, private and public:

1. Private presets. A private preset is visible only to the current user. By default new presets are created as private and only the users from the computer where it was created will be able to see it and use that preset in their profiles.

2. Public presets. Public presets are visible from all client computers (or other users on the same computer) that connect to and print via the computer where they are defined (the printer
When a public preset will be used, all the settings from that preset will be propagated to the client computers.

This list shows the presets (both private and public) that were defined. The icon on the right of the preset name shows what type of it is (public or private). You can filter the shown profiles by starting to type in the search field and also use the Public/Private checkboxes to filter them by type.

**DEFAULT PRESETS**

The default emails presets are automatically included in the application and available right after installation. These are presets created based on the most used scenarios for this section. You also have the option of sending out a **Test** email to see how it works.

**Open Outlook**

If this preset is used, after the PDF is generated the application will start Outlook and attach the PDF files to a new email. The email will not be sent automatically.

**Send using Outlook**

This preset is included as an example to show how you can send a generated PDF automatically with Outlook. You will need to make a **Copy** of it and then fill in the From/To email addresses, as well as the Subject/Body fields. The generated PDF will be attached to the email by default.

**OUTLOOK**

**Name**

You can type a name for the default preset you are editing/creating.

**Description**

Add a description for the default preset you are creating/editing.

**Author**

Optionally you can set the author for this default preset.

**Private preset**

When the doPDF is installed, a default preset is created. This preset uses its own default printing settings to create the PDF files. However you can change those settings and create a custom preset, that when used, will create PDFs using the options you’ve chosen. For each newly defined preset you can choose to have it as **Private** or **Public** by checking or unchecking the **Private** checkbox.

**Open window before sending**

If this option is selected, Outlook will be opened and the generated PDF will be attached automatically to a new email. The email will not be sent out automatically.

**Send without opening window**

You can enter in there the From/To email addresses as well as Subject/Body, and an email will be sent automatically after the PDF is generated (with it attached).

**From/To**
Add from/to/cc/bcc email addresses for the email that will be sent out.
You can configure the following email header properties:
- **From** address. This will show as the sender of the email (i.e. it can be your own email address)
- **To** email addresses. This is where the email will be sent out to, you can add multiple email addresses by separating them with semicolons (;).
- **CC** email addresses (use semicolon to add multiple addresses)
- **BCC** email addresses (use semicolon to add multiple addresses)

**Subject**
This is the subject of the email to be sent out. You can use macros to add automatically variables based on what PDF is being created. The following macro items can be added:
- `[N]` - The name of the document being converted
- `[T]` - The title of the document as defined in the Document section
- `[B]` - The subject of the document as defined in the Document section
- `[A]` - The author of the document as defined in the Document section
- `[YMD]` - Date in the format YYYYMMDD (year, month, day)
- `[Y]` - Year in the format YYYY
- `[M]` - Month in the format MM
- `[D]` - Day in the format DD
- `[HIS]` - time in the format hhmmss (hour, minute, second)
- `[H]` - Hour in the format hh
- `[I]` - Minute in the format mm
- `[S]` - Second in the format ss
- `[C]` - Counter in the format cc (it begins with 01 and increases at each printed document, if a file with the same name exists in the save folder)
- `[W]` - Workstation
- `[U]` - User name

**Body**
This is the body of the email to be sent out. You can use the same macros described above to add automatically variables based on what PDF is being created. If you are using SMTP or Outlook to send the emails, you can enter HTML content for the body of the email and preview it too. MAPI does not support HTML, only text.

**Attach PDF**
This option is checked by default and attaches the generated PDF file to the email that it sends out. If unchecked, an email will still be sent out but with content only (eventually with other files attached if using the Attach other files option).

**Attach other files**
Checking this option will let you choose other files to be attached to the email being sent out. You can add files using the Add Files... button or by writing directly the path to the file(s) you want attached. If you want to quickly remove multiple files from this field, you can use the Delete All button.

**Zip email attachments**
If this option is selected, the PDF file will be compressed first and the resulting zip file will be attached to the email. If the option to attach other files is selected, then all files (including the generated PDF) will be zipped in a single archive and attached.

**Change zip extension to**
Some email clients block certain types of attachments, thus if you want to be sure the email is delivered with the attachment you can choose to change the extension of the attached file. Commonly the extension can be changed to .txt, and the recipient will rename it back to zip in order to extract the files. You can choose to change the extension from zip to any other type, by writing a new extension in the combo field near this option (there's no need to add "." before the type of extension, only the extension name).

**Protect attachments with password**
The zip attachment can be protected with a password for increased security (the PDF in the ZIP can also be password protected).

**Category**
Outlook has support for email categories, so you can enter in here the label of an existing category.

**Importance**
By default emails will be sent with a Normal importance. You can however change that to High, and Outlook will add a red flag to the email marking its importance. You can also reduce the importance to Low (no notification will be shown in Outlook). You can set other email options supported by Outlook:

- **Request read receipt** - you will receive a read receipt from the recipient after the email is opened.
- **Do not allow Forward** - the email you send cannot be forwarded (not all email clients support this feature)
- **Do not allow Reply** - the email you send cannot be replied to (not all email clients support this feature)
- **Do not allow Reply All** - the email you send cannot be replied to (not all email clients support this feature)
- **Delete after send** - the email will be deleted after it is sent (so it will not be stored in the Sent folder).

Note: Some of the features mentioned on this page might not be available in your edition. The Professional edition includes all the features, while Standard and Lite have limited functionality. For a comparison between editions, please check feature matrix topic.
PDF Add-in for Office

Part II
2 PDF Add-in for Office

2.1 Configuring PDF Add-in

2.1.1 Settings

2.1.1.1 Printers

This lets you manage the available PDF printers.

With doPDF you can create as many printers as you want, all sharing the same driver but each could use a different profile. From the list of Printers you are able to choose which will be active and how to handle the PDF creation. Furthermore, if you have older versions installed, those will show up as printers too in this list.
Show one Save As PDF button
If this is checked, in the Save As PDF section of the addin ribbon tab you'll be able to choose (with a drop-down) what printer to use for creating the PDF.

Show each printer as a button
You can also choose to show a different Save As PDF button for each printer in the ribbon addin tab.