

**In order to be able to use PDF Printer for MS Sharepoint, you will need to configure its rules.**

**First, you define rules for recognizing documents, then create custom columns in SP libraries.**

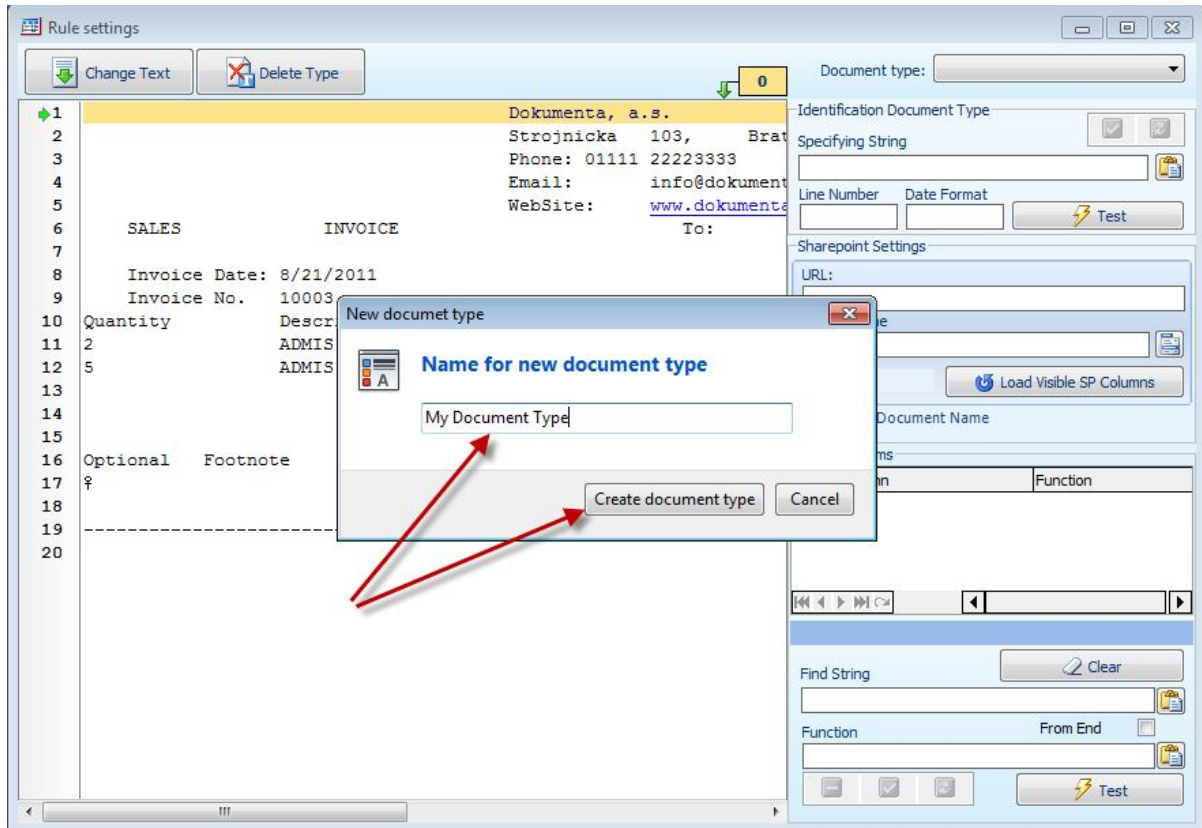
**Now you just have to print documents to PDF printer. Documents and metadata are automatically saved to the libraries SP by document type (invoice, purchase orders, emails, correspondence, contracts, etc.).**

## Creating rules for new type of document

- 1 Print one document to PDF Printer for MS Sharepoint printer.
- 2 The program will inform you this is an unknown type of document. Click „Yes“ to answer the question whether to create new rules for document recognizing.




- 3 A window of rules designer appears.

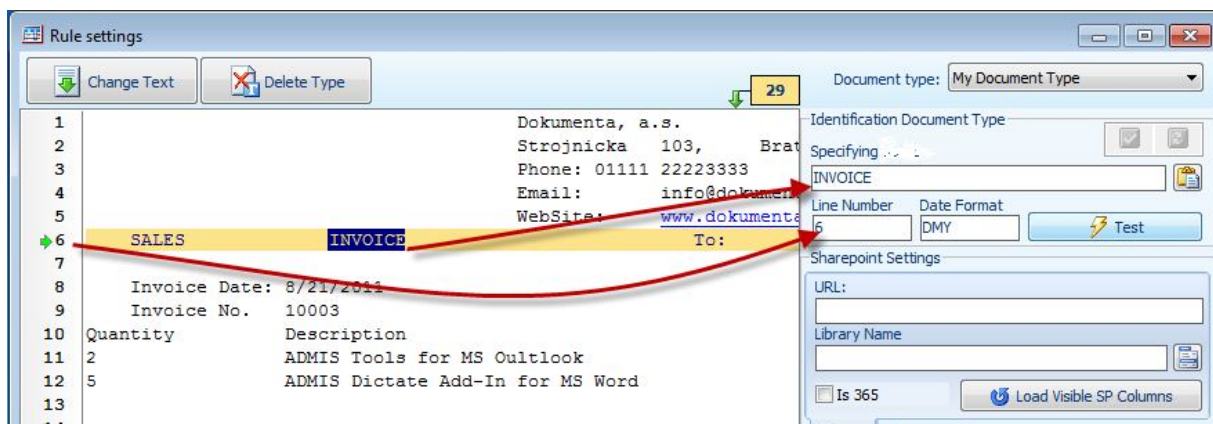


4 Type name of this type of document in „Name for new document type“ text box, and click „Create document type“.

5 In the left side of the designer, extracted text from the document you have just printed out is shown. Examine in detail the text and find such a string, which can be found in the same position in every document of this type. This is a specifying string for this type of documents.

6 Select this string and use the  button to copy the specifying string to „Specifying string“ text box.

7 Write number of line where the specifying string is located in “Line” text box.



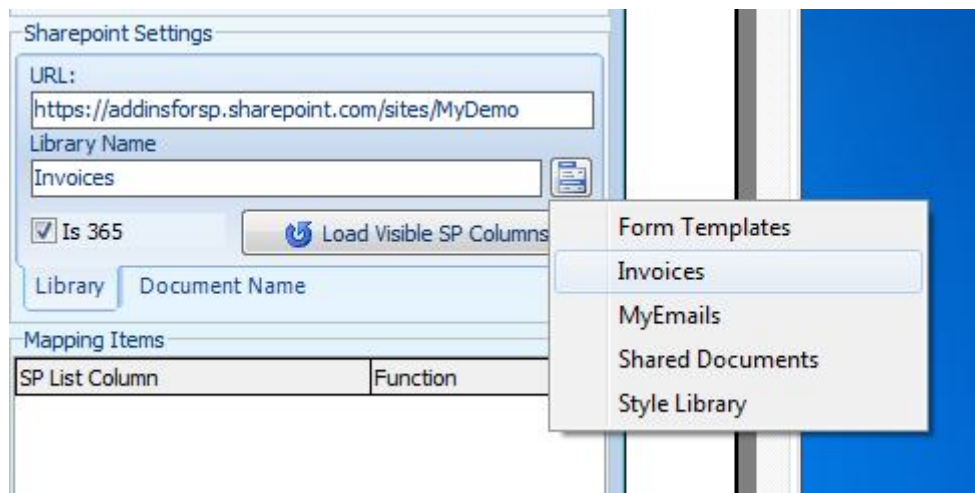
8 In case the data of date type will be processed, it is required to show the form of date as it appears on this type of document (DMY, or MDY or any other form)

9 Press „Test“ to verify if definition of specifying string is correct.


## Creating rules for mapping items in MS Sharepoint library

1 After verification of the rules for specifying string, continue to set rules for working with MS Sharepoint library.

2 Enter URL for corresponding website of MS Sharepoint into the „URL “ text box

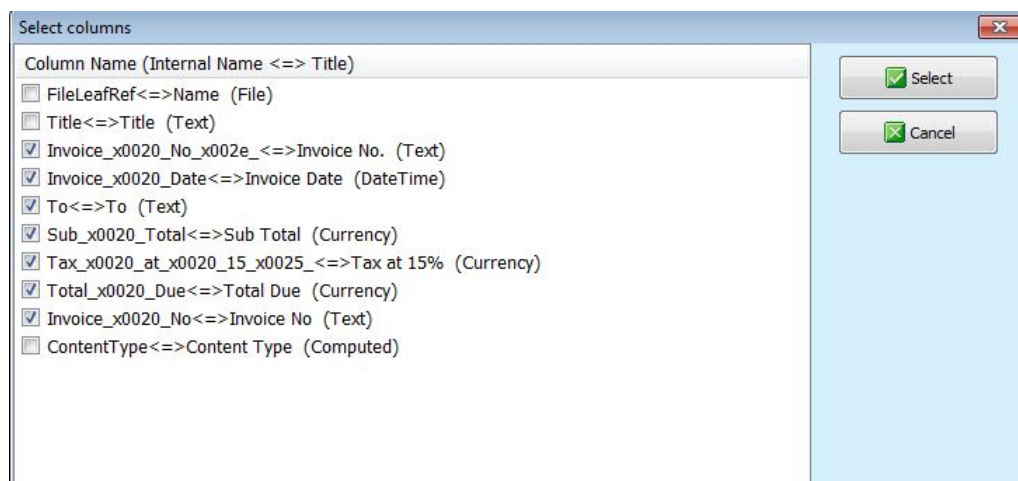


3 If MS Office 365 web is used, check the box „Is 365“.

4 Click  roll out a popup menu displaying a list of libraries located in the web that was entered into „URL“ text box.

5 Select the library to which the documents of this type will be saved.

6 Press button .



7 In the list of columns check those that will be filled in with the data from the document.

8 Press „Select“. The list of selected columns will be displayed in a grid.

SP List Column	Function
Invoice_x0020_Date<=>Invoice Da	
Invoice_x0020_No<=>Invoice No (	
Invoice_x0020_No_x002e_<=>Inv	
Sub_x0020_Total<=>Sub Total (Cl	
Tax_x0020_at_x0020_15_x0025_<	
To<=>To (Text)	
Total_x0020_Due<=>Total Due (Cl	

Navigation: << < > >> [Search] [Left] [Right]

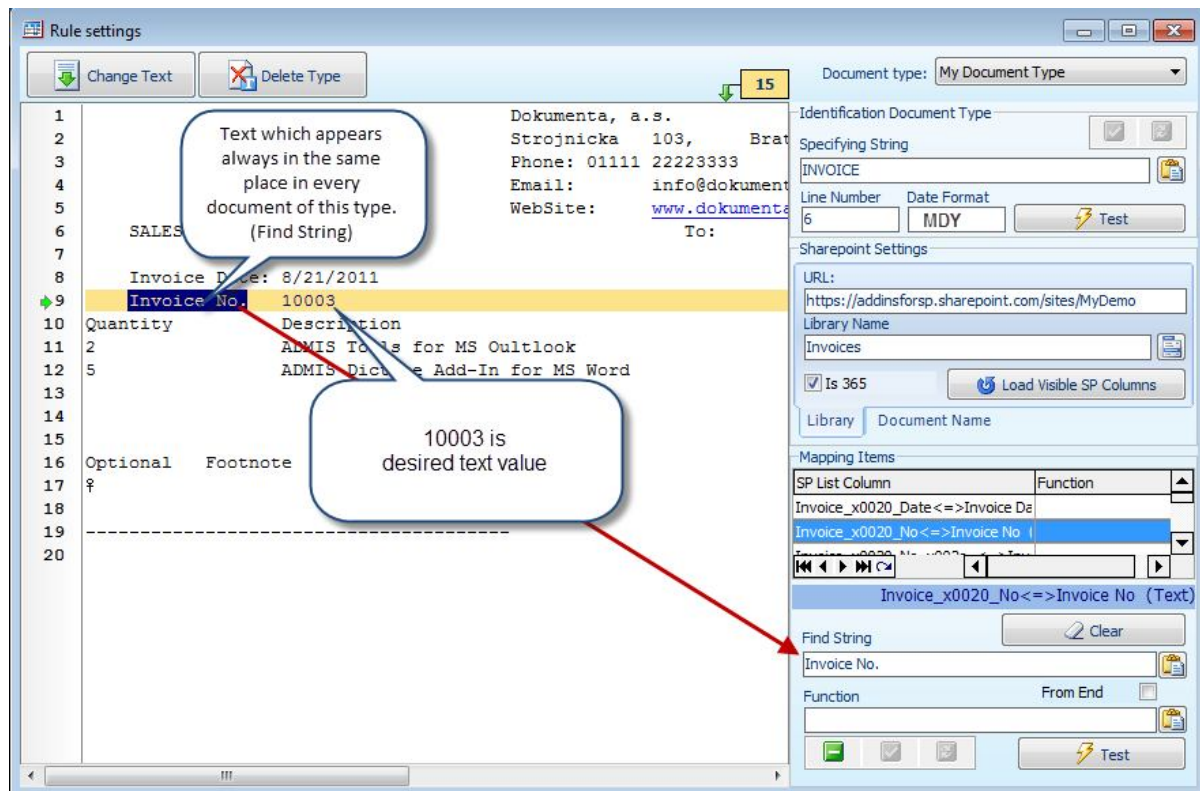
Selected Item: Invoice\_x0020\_No<=>Invoice No (Text)

9 Click to select a grid item for which you want to define rules for extracting text.

10 In the left side of the window - in the text of the document, find the location of the value you need to save in the corresponding column of MS SharePoint document library.

11 Examine in detail the text in line with the desired value or rows before or after this line and find such a text which appears always in the same place in every document of this type.

12 Highlight the text, press "Paste" and Copy the text in a text box „Find string“.



13 If you need to work with very large documents and the text you want to select is closer to the end of the file, check the box „FromEnd“.

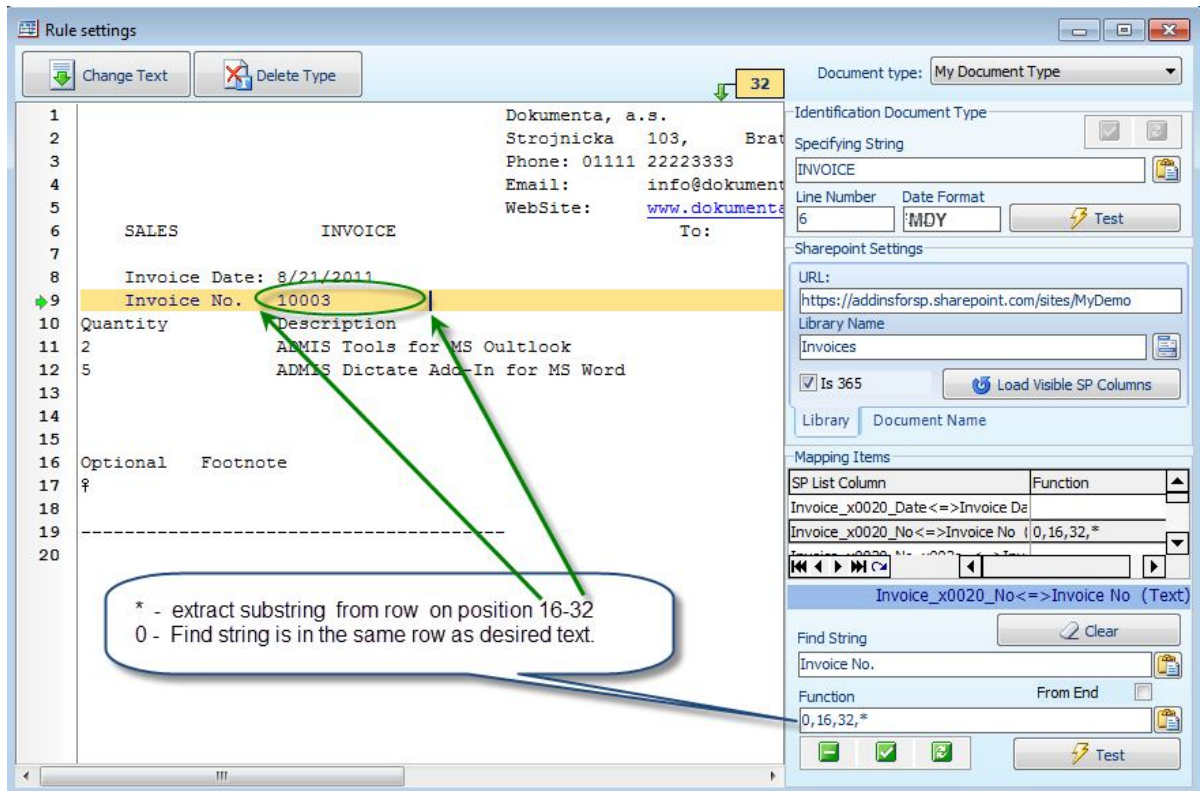
14 Into „Function“ text box, enter search parameters in the form:

Index FromColumn, ToColumn, Function

For example:

0,24,54, \*

15 Press „Test“ to verify if definition of settings of parameters for obtaining data is correct.



16 In the same way define the rules for extracting data for all MS Sharepoint Library columns displayed in the grid.

## Using functions for extracting data from documents

Rule -function for extracting text consists of the following parameters:

- Index indicates the number of lines between the fixed text (according to paragraph 11) and required text to be extracted - data. „0“ indicates that the extracted text-data is located on the same line as fixed text (according to paragraph 11). A negative value means that extracted text is located in the row prior to the row with fixed text, while a positive value means that the extracted data will be found in line following the line with a fixed text. The value of the index indicates the number of lines before or after.
- Column number from - index of the character in the row from which the text will be extracted, number 1, e.g. a string from the beginning of the line will be extracted, can be replaced it with Start text.

- Column number to - the index of a character in the line up to which the text will be extracted. If you need to extract string from a particular column after up to the end of the line, and we cannot determine the length of the row, replace the parameter ToColumn by End text.

- Function to be used for extracted text. This parameter can have following values:

- o \* - function returns the text from the line found with help of fixed text and Index parameter. Substring from the position after "FromColumn" up to „ToColumn“ will be extracted from this text and initial and end spaces will be removed.

- o <- out of the string obtained in the same way as \* function only that part will be returned which is located in front of the string shown left before the <character. E.g. "<Invoice No. "

- o > - out of the string obtained in the same way as \* function only that part will be returned which is located after of the string shown right after the > character. "> Invoice No. "

- o (- out of the string obtained in the same way as \* function only the number of characters from the left will be returned, that corresponds with the value shown right after ( parameter. For example, (10

- o) – out of the string obtained in the same way as \* function only the number of characters from the right will be returned, that corresponds with the value shown right after ( parameter. For example, )10

Parameters must be separated by a comma. String shown after parameter <a> is shown right after the parameter (no space between a parameter and a string). Similarly, the number of characters shown after the parameter (a) is shown right after the parameter.

## Emaples

### Sample 1

Extract rules for Invoice No.:

Find string = Invoice Date:

1,17,36,\*

Result is 10003

*Desired value is one line after line with find string.*

The same result we get the following:

Find string = Invoice No.

0,17,40,\*

*Desired value is in same line as the find string.*

## Sample 2

Find string = Invoice No.

-1,17,40,>Invoice Date:

Result is 8/21/2011

*Desired value is one line before the find string.*

The same result we get the following:

Find string = Invoice Date:

0,Start,36,)10

Result is 8/21/2011