



# ***PixEdit***<sup>®</sup> ***Converter Server***

Product Guide

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## About PixEdit® Converter Server

### Automatic conversion and archiving of electronic documents

PixEdit® Converter Server will automatically convert all your electronic documents and store them in your digital archive. The product installs as a service on your Windows server, and easily integrates with your document management system by selecting one or more monitoring folders. Documents will automatically be converted and placed in the designated output folder.

### Key features

- Convert all types of scanned documents
- Convert all born-digital documents<sup>2)</sup>
- Includes OCR (text recognition) to make **searchable PDFs**
- Recommended file format for archiving is **PDF/A**, an ISO standard for long-term preservation of electronic documents
- Full utilization of all available hardware capacity (use any number of servers and CPU cores)
- Unlimited number of documents

### System requirements

<b>Operating System*</b>	Microsoft® Windows Server® 2008 R2 Microsoft® Windows Server® 2012 Microsoft® Windows Server® 2012 R2
<b>Microsoft® Office**</b>	Microsoft® Office 2010 Microsoft® Office 2013 Microsoft® Office 2007 (supported, but not recommended)
<b>Other software***</b>	Microsoft® Visio® 2010/2013 (VSD and VSDX documents) CorelDRAW X5 or later. (CDR documents)
<b>Memory (RAM)</b>	4-16 GB depending on workload
<b>Processor (CPU)</b>	Intel® SSE2 compatible (Pentium 4 or later) Intel® Xeon™ (or equivalent AMD) recommended, 2-16 cores depending on workload
<b>Display</b>	Kernel services: Display not required Manager application: 1280 X 1024 pixels

The PixEdit® Converter Server kernel consists of two 64-bit Windows Service applications, which run on 64-bit Microsoft® Windows Server® operating systems. The PixEdit® Converter Server Manager may be installed separately on another system and may run on Windows 7 or Windows 8. Depending on your document throughput requirements (speed and volume), we recommend increasing the amount of memory, the processor speed and number of cores accordingly.

\*The service based architecture and per user licensing model makes this software well suited for deployment on virtual servers. This greatly simplifies the process of scaling machine resources for PixEdit® Converter Server so that it will have the document throughput capacity that your company or organization needs.

\*\*Microsoft Office is required to support conversion of Office documents. The Office package must be installed on the server and should include Microsoft Outlook to support conversion of e-mails.

\*\*\*PixEdit® Converter Server supports most scanned document types such as PDF and TIFF as standard. With Microsoft Office it also supports most office document types, such as Microsoft Word, Excel, PowerPoint, Publisher, Open Office and e-mail. To support conversion of other document types, installing additional applications on the server may be required.

Please contact [PixEdit](#) if you need more information.

#### Born-digital document file formats

- Microsoft Office (Word, Excel, PowerPoint, Publisher)
- Microsoft Visio
- Microsoft Project
- Microsoft Outlook with attachments\*
- Other e-mail formats
- OpenOffice
- CorelDRAW (CDR)
- ZIP-archives\*
- HTML Web Pages
- Microsoft XPS

#### Scanned document (image) file formats

- PDF Raster
- TIFF
- JPEG
- PNG
- CALS
- And 100 other multi-page and single-page image formats

#### About ZIP archives and e-mail attachments\*

PixEdit® Converter Server will automatically extract ZIP archives and convert all documents to PDFs, which then merges into one single PDF. The same applies for e-mails with attachments: All attachments are converted and joined together with the e-mail itself in a single PDF.

## Main functions

### User management

In the tab “User management”, you manage your users.

#### Toolbar



This is the toolbar for “User management”. Here you can create a new user, delete existing user and edit users.

The user management functions is also available from the User View’s context menu.

#### List of users

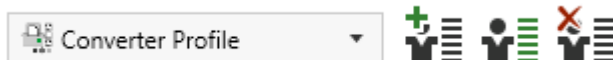
NAME	JOB PROFILES	COMMENT
admin	Converter Profile	Default administrator account created on first startup
My User	Another profile	Created for product guide

This is the list of all the users created. Here you can see the usernames, comments added to the users and you can see which job profiles connected to the different users.

### Converter profiles

In the tab “Converter profiles”, you create, delete and modify your profiles.

#### Toolbar



In this toolbar, you can choose between your profiles, you can create new profile, edit existing profile and delete a profile. When

you choose between the profiles, the configurations under will change accordingly to what have previously been done to the different profiles.

PS: There is no save button because the profiles saves automatically when you do a change.

#### Document output format

DOCUMENT OUTPUT FORMAT

PDF/A-1b ISO 19005-1 Level B

JPEG Quality  85

Document output format is a list of the currently available output formats.

You can use the “JPEG Quality” slider to change the quality of pictures (Scanned material), in the different formats except the compact formats. It is mostly used for reducing the size of files. Default quality setting is 85. The quality slider will not have any effect on converting digital documents.

#### *ZIP archives*

ZIP ARCHIVES

Throw error when a fileformat is not supported

When “Throw error when a file format is not supported” is checked, converter jobs will fail if they contain unsupported file formats. If this setting is un-checked, unsupported file formats will be ignored and the converter job will be delivered.

#### *OCR*

OCR

Process documents with OCR

Create searchable PDF documents by enabling optical character recognition (OCR) in the current profile. This setting is enabled by default.

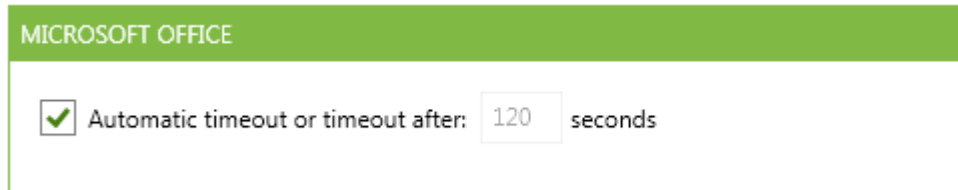
#### *Verify PDF/A*

VERIFY PDF/A

Verify documents according to PDF/A-1b standard  
 Verify documents according to PDF/A-2b standard

Verify documents according to either PDF/A-1b or PDF/A-2b or both. When these settings are enabled and the current document in process qualifies according to the standard, the document will be moved untouched to the designated folder. There is also possible to configure a specific folder to put documents, which is already according to the PDF/A standard.

## Microsoft Office



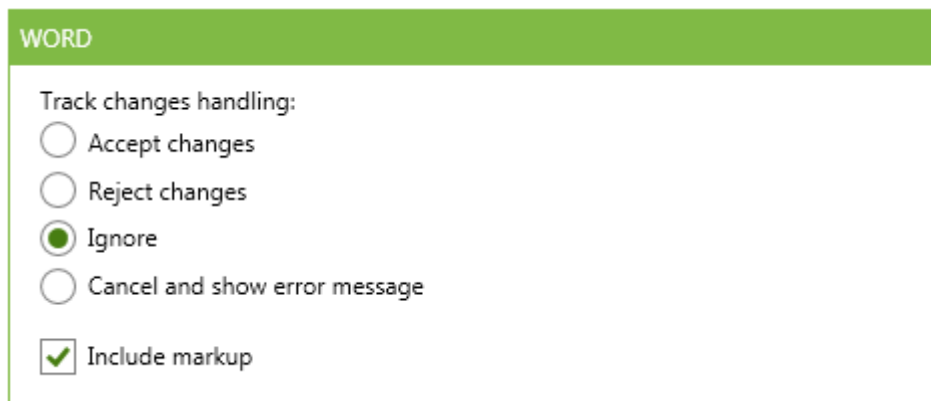
MICROSOFT OFFICE

Automatic timeout or timeout after:  seconds

If an office document conversion exceeds the specified timeout setting, the office application will be terminated and the conversion job will fail.

Automatic timeout is the default configuration for this setting. If you would like a manual and fixed timeout value, please un-check the setting above and specify a new value in seconds

## Word



WORD

Track changes handling:

Accept changes

Reject changes

Ignore

Cancel and show error message

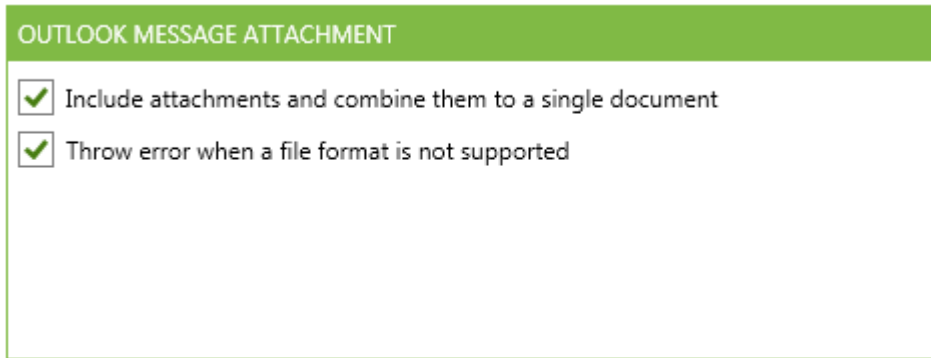
Include markup

PixEdit Converter Server has the ability to handle track changes in Word documents in different ways

- Accept changes – All the tracked changes will be accepted and applied to the converted pdf document
- Reject changes – All the tracked changes will be rejected, i.e. they will not show in the converted document.
- Ignore – All the tracked changes will be visible with their respective message boxes and highlighting. PS: The markup and highlighting will not show if include markup is un-checked.
- Cancel and show error message – If the system detects tracked changes in the word document, the document will fail.

If “Include markup” this is unchecked, comments and track changes will not show.

### Outlook message attachment



By enabling “Include attachments and combine them to a single document”, PixEdit Converter Server will convert and combine all documents attached to an email to one single PDF. If this setting is un-checked, the software will only convert the email body to PDF.

By enabling “Throw error when a file format is not supported” the conversion job will fail, if the Outlook Message contains a document, which is not supported. If this setting is un-checked, any un-supported documents will be ignored during conversion and the job will be delivered.

### Document processing



In the tab “Document processing”, you can create, delete and modify your converter configurations. This is also, where you can see ongoing conversion activity and server performance.



#### Toolbar

This is the toolbar for “Document processing”. Here you can create unlimited number of configurations. You can configure watch folders or email inbox configurations. You can also delete configurations from the toolbar.

### List of configurations

CONFIGURATION NAME	USER	JOB PROFILE	WORKING	OUTPUT	FAILED	ENABLED
 Conversion config	admin	Converter Profile	0	0	0	<input checked="" type="checkbox"/>
 Mail watch config	admin	Converter Profile	-	0	0	<input checked="" type="checkbox"/>

Here you have the list of configurations. This list shows:

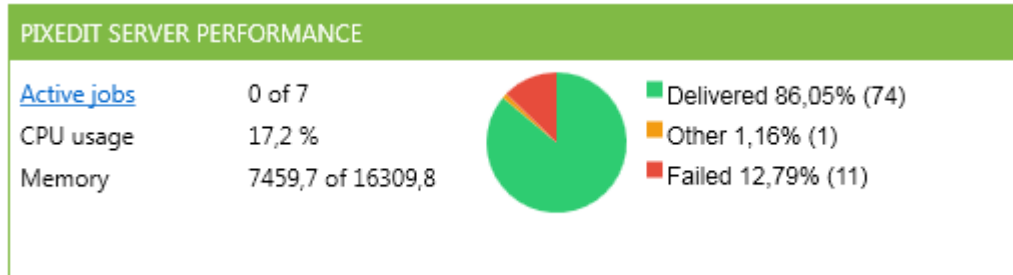
- **Configuration name.**
- **User** – The user running in this given configuration
- **Job Profile** – The job profile selected for this configuration.
- **Working** – This shows how many files there is in the input folder. If the configuration is a watch email inbox configuration, working will only show a “-“.
- **Output** – shows how many files there is in the output folder.
- **Failed** – shows how many files there is in the failed folder.
- **Enabled** – The checkbox enables/disables the configuration, i.e. turns it on or off



The “working”, “output” and “failed” are clickable numbers. If you click one of them, they will lead you to the selected folder.

Here you can also right click on the configurations to edit them.

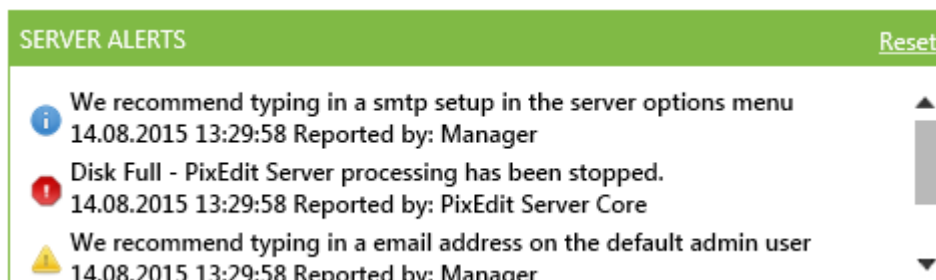
### Live server performance



This section shows the performance of the server. It shows how many active jobs are running now, CPU usage of the Windows server, memory usage and it shows statistics for how many delivered and failed jobs there are.

The “Active jobs” item is a hyperlink. If you click on this link, a fly out window will appear showing you the current documents in progress. It will also show you the status on those documents.

### Server alerts



This is the server alerts window. In this section of the server manager, PixEdit Server will display useful information or critical server alerts to the user.

The “Reset” button will be visible if any alerts are present. By clicking this button you will clear all server alerts. Error alerts (red) which are not resolved will re-appear until the undelaying problem is fixed

There are three different alert types for PixEdit Converter Server



#### Alert types

**Info** – These are information alerts, suggestions and recommendations.



**Warning** – These are warning alerts. Advice/recommendations.

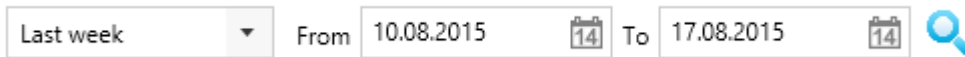


**Error** – These are error alerts. They are critical failures or problems, and if one of these shows in the server alert window all active configurations stops.

## Analytics

In the tab “Analytics”, you can view and analyze any failed jobs.

### Toolbar




With this toolbar, you can select between three predefined time spans.

- Last week
- Last month
- Last 3 months

All the predefined time spans go back in time.

You can also do a specific search with the “From” date picker and “To” date picker. When you select a predefined value from the drop-down list, the failed conversion list will automatically be updated. However, if you select a specific “From” and “To” date you have to press the “search” button after you have selected your desired dates.

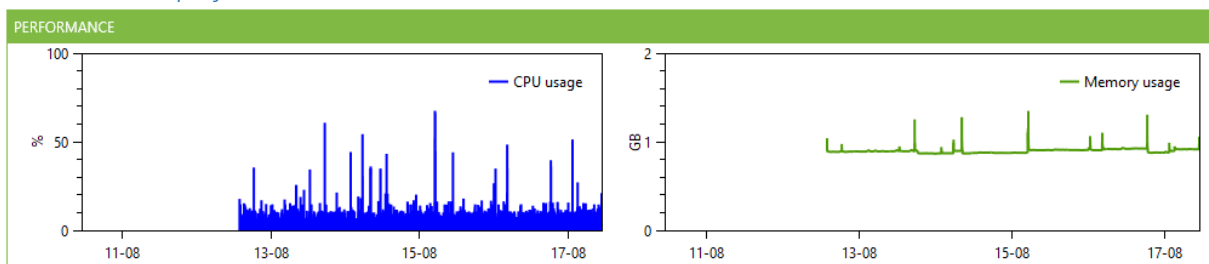
### Failed conversions list

FAILED JOB TITLE	STATUS	TIME	ERROR MESSAGE
Convert 'PixEditConvertMSPProject.mpp' to PE	Failed	17.08.2015 10:45:48	 Error: Initialization of MS Project failed. You need to install Microsoft Project to be able to convert

In this list all failed converter jobs, which matches your search criteria, will be displayed. The default time span is set to Last week.

In the result list, you will see the job title, status of the job, time and the error message. If you click the blue icon “i” in front of the error message, a fly out window will be displayed showing all the error information stored regarding the specific file.


### Historic server performance



Here you have two interactive historic performance views. You can drag to the sides, scroll in and out to get a bigger or smaller time span. You can also click the line to get an accurate point of time and use. The left (blue) window shows CPU usage and the right (green) window shows memory usage.

Server options

#### *PixEdit server – Performance*



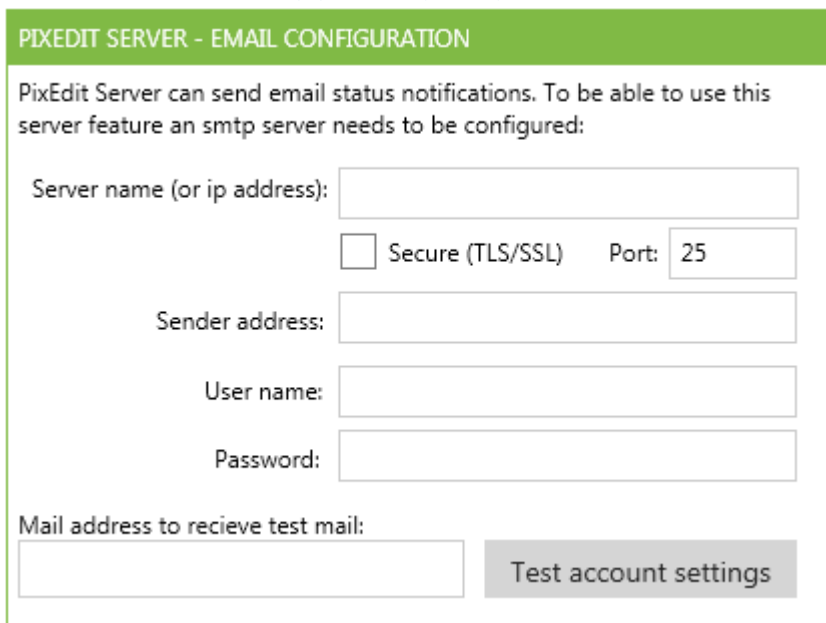
PIXEDIT SERVER - PERFORMANCE

High

There are three different performance settings for PixEdit Converter Server

- **Economic** – Max CPU's / two.
- **High** – Max CPU's minus one. (Default)
- **Maximum** – All CPU's.

#### *PixEdit server – Email configuration (SMTP)*



PIXEDIT SERVER - EMAIL CONFIGURATION

PixEdit Server can send email status notifications. To be able to use this server feature an smtp server needs to be configured:

Server name (or ip address):

Secure (TLS/SSL) Port:

Sender address:

User name:

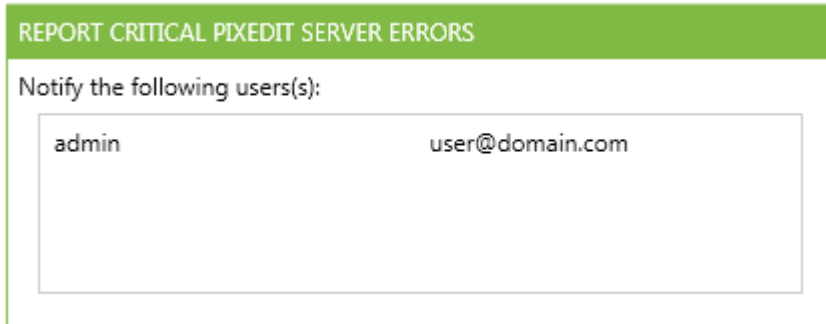
Password:

Mail address to receive test mail:

Test account settings

By providing an SMTP setup, PixEdit Converter Server will use this setup to send mails to the configured users.

### Receivers of critical errors



REPORT CRITICAL PIXEDIT SERVER ERRORS

Notify the following users(s):

admin user@domain.com

Here you can select which user(s) who will receive email alerts if a problem should occur in server. A valid SMTP configuration must be provided before PixEdit Converter server is able to send email alerts.

### OCR options

#### Languages



SELECT LANGUAGES

English

French

Italian

Norwegian

Swedish

By selecting your preferred language, the OCR engine will be more accurate when generating searchable documents. English is always selected and it cannot be turned off.

You can choose more languages but this will slow down the OCR process during conversions significantly.

## Getting started

How to get started with PixEdit Converter Server software.

### Setting up your own personal configuration

PixEdit® Converter Server is by default ready to be used. When the software starts for the very first time it creates an “Admin” user and a default profile called “Converter profile”. With this initial setup, you are ready to start converting your documents to PDF.

However, it is possible to configure your own users and profiles for more specialized tasks. Like for example if you want a profile that does not perform OCR, or you want a profile where markup is not shown. Here is our recommended way on how to do this.

#### *Create and personalize your converter profile*

First, we recommend creating a new converter profile. Go to the “Converter profiles” tab, here you will find all you need to create your own converter profile. Find and click the button “Create new job profile”. A new dialog box appears in the middle of the screen. Type in your desired profile name in the text box called “Profile name”. Choose an image you would like to represent your profile. Press ok.



Now you have created your own converter profile. You will see it has automatically been chosen in the list in the top left corner. You can now begin to personalize your profile. The profile will automatically be saved whenever you change some of its parameters.

#### *Create your new user*

Second, we recommend creating a new user. Go to the “User management” tab, here you can see the list of all server users. You can also delete, edit and create new users here. Find and click the button “Create a new user”. A new dialog box appears in the middle of the screen. Type in the information about the user. Username, e-mail, password and a comment if that is desirable. Now you can add your job profile. The list shows all created job profiles, choose the profile that you just made. You can also add more profiles with CTRL if the user should have access to different profiles.



In the bottom is a choice that says “Send e-mail notifications when document processing fails”, mark this if you want the user to get an email when a document conversion fails with this user. For this to work you will need to have set up the SMTP account in “[Server options](#)”. Press ok and your user is ready to go.

### Set up your configuration

Last, we recommend setting up your configuration. Go to the “Document processing” tab, here you can see all your configurations. You can edit, delete, start, stop and create new configurations. There are two different configurations. Folder watcher and email inbox watcher.

#### Folder watcher

Find and click the button “Add watch folder configuration”. A new dialog box appear in the middle of the screen. Type in your desired configuration name. Then choose the user that you have created. After you have chosen the user, the list with job profiles will show the profiles that are connected to that specific user that you have selected. Select the newly created profile. Now choose the desired input, output and error folders. Press ok, and your configuration will appear in the list.



Your new configuration is by default disabled. You have to enable the configuration for the document conversion to start.

#### Email inbox watcher

Email inbox watcher is a service, which listens to an email inbox for incoming emails. Emails, which contains documents, will then be sent to file format conversion.

Find and click the button “Add watch email inbox configuration”. A new dialog box will appear. Type in your desired configuration name and the email credentials for the specific account. Please keep in mind that the email watcher will delete the email after it has been read. So using your personal email account to watch is not a good idea.



You may verify the email account settings by pressing “Test connection”. You will then get a response in a couple of seconds, whether the setup was okay or not.

There is a setting in this dialog to send the converted document in reply to the sender or a notification if the conversion for some reason fails. For this to work you will have to set up the SMTP account in “[Server options](#)”.

There is also a setting in this dialog to control whether all attachments should be combined to one single PDF document, or processed separately as single documents.

Now you can choose if you want to combine attachments or convert them as separately documents.

If you want to add some restrictions to witch emails the system should process, just press “Filters...”. Here you can add restrictions to specific senders, subjects or domains. Now you can select your user and then the job profile. Select your desired output folder and error folder and press ok.

Your new configuration will now show in the list of configurations. Please tic the “Enable” checkbox to start processing documents with this configuration