



Installation / Setup Guide First Edition



for Microsoft Windows

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FORMAX, Publisher

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INSTALLATION

System Requirements

PC Hardware	Software
Pentium 2GHz PC with 1 GB RAM or higher	Works with any Windows [≋] compatible printer (single printer per seat)
4 GB free hard disk space	Preformatted print data only in PDF format
CD-ROM	PDF Reader
Windows 2000 OS or higher	Java Runtime

1. Insert MailDoc software disk into CD Drive. (If the disk does not autorun open the CD Drive and select Setup.exe). MailDoc Beginner Setup will open, close any applications running and press "OK" to begin install.

🕵 MailD	oc Beginner (TM) Setup
	Welcome to the MailDoc Beginner (TM) installation program. o cannot install system files or update shared files if they are in use. e proceeding, we recommend that you close any applications you may nning.
	OK Exit Setup

2. Select program directory and then press the computer icon to continue setup.

MailDoc Beginner (TM) Setup Begin the installation by clicking the button below. Eick this button to install MailDoc Beginner (TM) software to the specified destination directory. Directory: C:\Program Files\MailDocbeginner\ Exit Setup		ginner (TM) Se	
Click this button to install MailDoc Beginner (TM) software to the specified destination directory. Directory: C:\Program Files\MailDocbeginner\	🛃 MailDoc Begini	ner (TM) Setup	
C:\Program Files\MallDocbeginner\ Change Directory		Click this button to install MailDoc Beginner (TM	1) software to the specified
Exit Setup		ailDocbeginner\	Change Directory
		E <u>x</u> it Setup	

3. Select program group and press "Continue"

Mai	lDoc Beginner (TM) Setup	
	🕵 MailDoc Beginner (TM) - Choose Program Group 🛛 🔀	
	Setup will add items to the group shown in the Program Group box. You can enter a new group name or select one from the Existing Groups list.	
	Program Group: MaliDocBegin	
	Existing Groups:	
	CyberLink PowerDirector Dell	
	Dell Accessories Email Marketing Director FontList Google Chrome	
	HP Macromedia HomeSite 5 MalDoc	
	<u>Continue</u> Cancel	

4. Installation will begin.

MailDoc Beginner (TM) Setu	p
圮 MaiDoc Beginner (TM) Setup 🛛 🔀	
Destination File: C:\WINDOW5\system32\tircl.dll	
41%	
Cancel	

5. Press "OK" when installation has completed to begin using MailDoc Beginner.

	MailDo	oc Beginner (TM) Setup	
MailDoc Beginner (TM) Setup MailDoc Beginner (TM) Setup was completed successfully.		MailDoc Beginner (TM) Setup was completed successfully.	

PRODUCT REGISTRATION

To begin using MailDoc Beginner the product must be registered with the Serial Number provided. When first opening MailDoc a registration prompt will be displayed, click "OK" to continue.

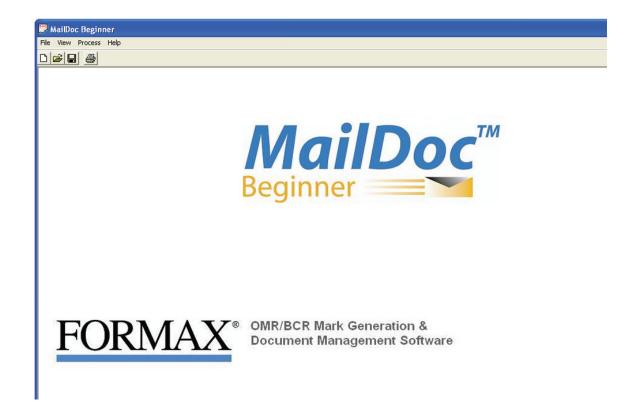
MailDoc Professional	×
Please Click OK To Register On-Line And Complete Installatio	n
ОК	

Fill out the required registration information and click "Register" to send the information. Upon successfully completing the registration MailDoc Beginner will be ready for use and a confirmation e-mail will be sent.

🛱 MailDoc Reg	istration	
Registratio	n	
Serial Number:		
Your Name:		
Your Email:		
Company Infe	ormation	
Company Name:		
Phone Number:		
Address 1:		
Address 2:		
City:		
State:		
ZIP code:		
Country:	United States	
Contact Infor	mation	
Contact Name:		
Contact Email:		
	Register Cancel	

ABOUT MailDoc[™] Beginner

MailDoc™ Beginner| adds OMR or BCR marks to your PDF documents, invoices and statements which are required by OMR/BCR enabled folder-inserters. These OMR/BCR marks tell the folder-inserter which documents go together for mailing based on a single identifier. With this software, you can create and save a configuration file or Templates for commonly used documents, enabling re-use of these configurations for commonly performed tasks.



ADDING MARKS TO THE FILE

Select File/New to create a new job or File/Open to open a previously saved job or template.



The Configuration screen will appear. Use the "Select File" button to find your "Input File" or enter the filename. The "Input File" are your invoices, statements or other documents that you have exported and saved as a text PDF file.

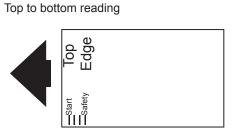
🗒 Configura	tion	
Input File	C:\Documents and Settings\cmacneil\Desktop\MD Input\Formax	Select File
Output File	PDF Duplexed C:\Documents and Settings\cmacneil\Desktop\MD Output\Forma	Browse
		Browse
Mark Definition	OMR Basic Top to Bottom.drv	
	Metric	
	Distance from the top edge of the page .7 (cm)	
	Distance from the left edge of the page .7 (cm)	
Ignore select gro	oup on the first page	
Overlay File		Browse
Divert to File 0		
	nnts which are larger then 📄 pages 📄 Add OMR Ma	
Divert File		Browse
Divert docume Divert File	mnts which are larger then pages F Add OMR Ma	
Divertille	ļ.	Browse
PDF Options-		
Single Side		Banners
C Duplex Do	sument	
🗖 Mak	e Document Duplex (Add a Blank page to odd sets)	
🕥 Mari	ks On Front Page	
C Mar	ks On Back Page	
	OK Ca	ncel

You will also need to enter the following information:

- Output File: Enter the filename and location for your processed PDF documents with OMR/ BCR added.
- **Mark Definition:** Contains the options of which type of OMR/BCR will be applied to the document, based on the inserter feeding direction.

Mark Definition Options:

"BCR Basic Bottom To Top.drv": "BCR Basic Top To Bottom.drv": "OMR Basic Bottom to Top.drv": "OMR Basic Top to Bottom.drv":



Bottom to top reading



Top to bottom is the more common reading direction. In most cases the top edge of the form is leading, using the top to bottom orientation. In cases when the top edge of the form is trailing the bottom to top mark orientation is needed.

• **OMR/Barcode Location:** This determines where the marks will be physically located on the documents.

When you have made your selections, click "OK" to display imported document.

frmDocum	entPDF					
Page < 🗍			uping Criteria Repeating Value	Start Text 🔿 En	d Text	
44 Ve Dove	ax OMR/BCR entures Drive 1, NH 03820				INVO	DICE
USA					Invoice No.	78381
	ephane: 603) 749 ehouse:MAIS	9-5807			Custom er No.	ABCCO
		Bill To:			Ship To:	
ABCO	COMIANY			ABCCOMTASY	*	
	VERSAL LASE CORD, SE 03820			1 UBIVERSAL I COSCORD, SE		
Tele	phone: 603-3 43-1	1254		T elephon e: 603	- 343-1 254	
C	ontact: RICHAR	DDAVIS		Contact: RIC	EARD DAVIS	
	p Via	T.O.B		Terms	Salesp	er san
YELI				T JO DAYS		
08/1 2/2009	Order Date 08/12/2009	50 1	Order ed By	201		Resale 1

SELECTING THE GROUP FIELD

Once your document opens, you will need to select your group field. The group field is the unique information used to determine where a document begins and ends. In this example, the group field is the invoice number. The folder-inserter will know the previous document is complete when it sees a new invoice number.

Select the grouping field by clicking and holding the right mouse button at the top, left corner of the information to be selected, and dragging and releasing the mouse button at the bottom, right corner of the information. A black box will appear around the selected field. The text in the box will be displayed in red.

ge <]]		1 >	. ⊢ F	ouping Criteria Repeating Value	0.0			
						e 🔘 Start Text	C End Te	xt	
44	rmax OM Ventures	s Drive						INVC	DICE
U	iver, NH iA	03820						In voice No.	78381
	T elephon e l'ar eh ouse		49-5807					Customer Na.	AB C CO
			Bill	To:				Ship To:	
AI	CCOMI	AFY				ABCO	TATAC		
1		AL LAST	E			1 0 51	VERSAL LASE	:	
CO	SCORD.	. FH 038	20			COFC	ORD, 5H 0382	0	
1	dephane	e: 603-3 43	-1254			T ele	phone: 603- 343	-1254	
	Contact	RICHAI	RDDAVI	8		C	ontact: RICHAP	D DAVIS	
	Ship Via			7.0.B		Terms		Salespe	r 308
	HLOW					BET 30 DAYS			
In voice D: 08/1 2/200		er Date	30 1		Ordered By		201		Resale 1
Order Quantity	Shippe Quanti	ed Tax			Iten Hu Iten Dese			Onit Price	Extended Price
1		1 5 3	393-8731 A TE TY C	OVER		V .I M : Each		5513	5513
1		1 5 3	385-0004			V .IM : Each		7.88	7.88

Grouping criteria can be used when a repeating value is not present on each page. For example, if there is no invoice number available, a date, salutation or page number that is present only on the first or last page of a document can be used to separate each set. In the sample below the page number is used. In this case a box is drawn around the page # field on the document, "Start Text" is selected and "Page # 1" is typed into the "Match Text" field (*Note:* the "Match Text" field is case sensitive.).

<		_		ouping Criteria Repeating Value 💽 Start Text	C End Text	Match Text	Page #1
YHI	LOW			SET JO DAYS			, -
voice Date 08/1 2/2009	Or der 08/1 2/		30 1	Ordered Dy	201		tesale 1
Order Quantity	Shipped Quantity	T az		Item Number Item Description		Unit Price	Exten ded Price
1	1	5	393-8731 8 AFETY COVER	▼ •f Mat: Each		5513	5513
1	1	5	385-0004	▼ •f M : Esch		7.88	7.88
1	1	5	393-8731 8 AFETY COVER	⊽ ef Ma∷Ersch		5513	5513
1	1	5	385-0004 CL VTCH HASDW	V •f M : Each		7.85	7.88
1	1	5	382-0009 HOOK VELCEO 1	⊽ +íM:Esch		1.69	1.69
1	1	5	393-8731 8 AFETY COVER	⊽ •f Ma:Esch		5513	5513
1	1	5	385-0004 CL VTC H A 5 D W	V •ſM∶Esch /HEEL BASE LLATE		7.88	7.85
Print Dat Print T im Page	e 02:32:1	3 1 <u>1</u>	Formax OMR/BC 44 Ventures Drive Dover, NH 03820 USA	•			

SAVING YOUR SETTINGS

You can save your job by using the "File/Save", "File/Save As" or "File/Save Template" options. "Save" or "Save As" will save the file with all OMR/BCR settings along with input and output file settings. "Save Template" saves just the OMR/BCR settings without the input and output settings for use with other input and output files, eliminating steps and saving time for recurring jobs that have the same layout but with different data.





PRODUCING THE MARKED DOCUMENT

To process your document, select Process from the menu bar.

👺 MailDoc Beginner - [frmDocumentPDF]			
File View Process Help	S File View Process Help		
D 😂 🖬 🔤 Process			
Page < 1 >	Grouping Criteria Repeating Value C Start Text C End Text		
Formax OMR/B CR 44 Ventures Drive Dover, NH 03820 USA Telephone: 603) 749-5807 H archouse: 14 ATF Bill Te	INVOICE Introice Mo. 75381 Custom er Mo. AB C CO Ship To:		
ABCCOMIAFY	ABCCOMIASY		
1 VEIVERSAL LASE	1 UBIVERSAL LABE		
COFCORD, 5H 03820	COFCORD, FE 03820		
T elephon e: 603-3 43-1 254	T elephon e: 003- 343-1254		
Contact: RICHARD DAVIS	Contact: RICHARD DAVIS		

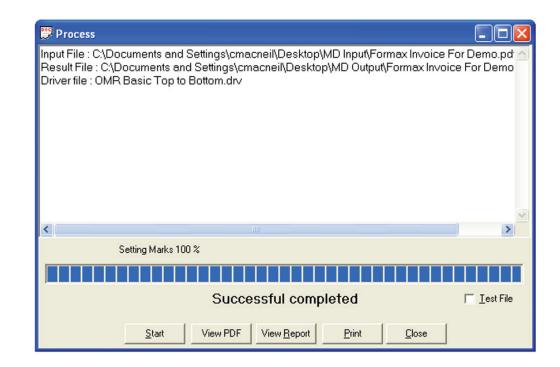
Once the Process screen appears, you can click Start to generate the appropriate marks in the output file. Selecting the Test File check box will generate comments beside each mark describing the marks' instruction.

Process	
Input File : C:\Documents and Settings\cmacneil\Desktop\MD Input\Formax Invoice For Der Result File : C:\Documents and Settings\cmacneil\Desktop\MD Output\Formax Invoice For	
Driver file : OMR Basic Top to Bottom.drv	Demo
	~
	>
	est File
Start View PDF View Report Print Close	

The Summary Report will appear on the screen once the file has been processed and marks have been added. The Summary Report for this job is displayed below. The report can be printed and/or saved. Close the screen when finished.

Save Print Close Default File: C:\Program Files\MailDocbeginner\work\report.txt Summary Report File Name : C:\Documents and Settings\cmacneil\Desktop\MD Input\Formax Invoice For Demo.pdf Date : Friday, September 25, 2009 Original File Counts	Report		
File Name : C:\Documents and Settings\cmacneil\Desktop\MD Input\Formax Invoice For Demo.pdf Date : Friday, September 25, 2009 Original File Counts 	(<u>š</u> ave)	PrintDose Default File: C:\Program Files\MailDocbeginner\work\report.txt	1
Date : Friday, September 25, 2009 Original File Counts 		Summary Report	
Date : Friday, September 25, 2009 Original File Counts 			
Original File Counts 			f
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts 	Date	: Friday, September 25, 2009	
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1 Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts 			
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1 Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts 			
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<pre>Sets of 3 pages = 3 Sets of 4 pages = 1 Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1</pre>			
Sets of 4 pages = 1 Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1			
Sets of 5 pages = 1 Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts Sets of 1 pages = 15 Sets of 2 pages = 3 Sets of 3 pages = 1			
Total Pages 49 Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts 			
Total Sets 28 (Sets larger then 1000 pages not included) Final File Counts Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1			
Final File Counts 			
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1	Total Sets	28 (Sets larger then 1000 pages not included)	
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1			
Sets of 1 pages = 15 Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1	Final File	Counts	
Sets of 2 pages = 8 Sets of 3 pages = 3 Sets of 4 pages = 1			
Sets of 3 pages = 3 Sets of 4 pages = 1			
Sets of 4 pages = 1			
	-		

From the Process screen the PDF of the processed file can be viewed by pressing the "View PDF" button.



The top of the sample PDF output file is shown below. The marks added by the software have been highlighted.

Formax OMR/BCR 44 Ventures Drive Dover, NH 03820	INV	DICE
USA	Invoice No.	78381
Telephone: (603) 749-5807 Warehouse: MAIN	Customer No.	ABCCO
Bill To:	Shin Tat	
ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820	ABC COMPANY 1 UNIVERSAL LANE CONCORD, NH 03820	
Telephone: 603-343-1254 Contact: RICHARD DAVIS	Telephone: 603-343-1254 Contact: RICHARD DAVIS	

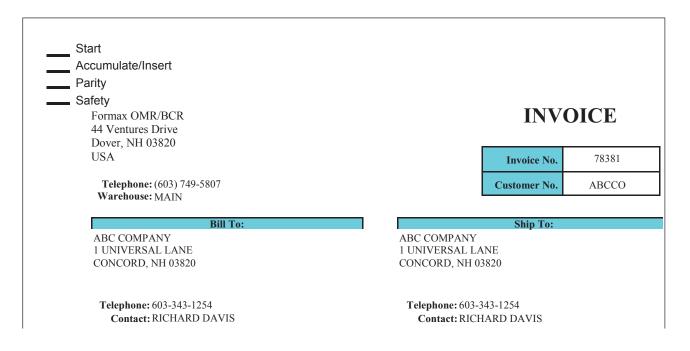
Opening Saved Files and Templates

To open a saved file or template, select "Open" from the File Menu.

📅 MailDoc Beginner	
File View Process Help	
New Ctrl+N	
Open Ctrl+O	
Close	
Save	
Save As	
Save Template	
Exit	
	' MailD
	Roginnor
	Beginner 🚃

OMR MARK POSITIONS

This processed "Test File" PDF displays the name of each mark listed next to the mark. This example shows basic OMR laid out top to bottom.

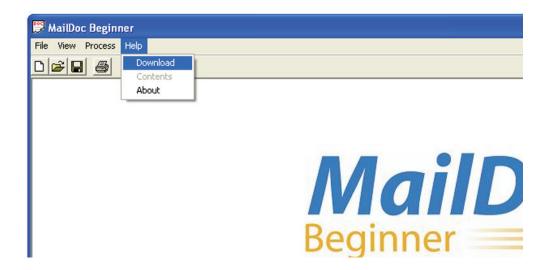


MARK DEFINITIONS

Start	On every page, defines the beginning position of the OMR code.	
Accumulate/Insert	Jlate/InsertDetermines if additional pages are to be pulled or if the set is complete.No mark present = Accumulate; Mark present = Insert.	
Parity	A parity mark ensures that the number of marks on the page are even.	
Safety	On every page. Provides extra security, primarily used for paper skew, if the safety mark is not read an error code will be displayed on the inserter.	

Product Updates

Product updates are available periodically to enhance the product performance. To access updates, a password must first be obtained through Formax. Press the Help button and select "Download" from the drop down menu.



Enter the password and follow the on-screen directions to complete the download.

🛱 Enter Password		r d	
Enter P	assword:		
	Submit		Cancel