



■ Workflow

PDF-Document processing

Module


Documentation


December 2020

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1. How to handle this documentation

The symbol  is for notes. Here you will find particularly important additional information - on the topic described.

Tips and tricks are marked with the symbol . This information simplifies working with the programme.

2. Requirements

In order for PDF document processing to work properly, certain requirements must be met, which are addressed below.

2.1 Scanner

- must be able to generate a PDF document
- must be OCR-capable and have OCR recognition switched on

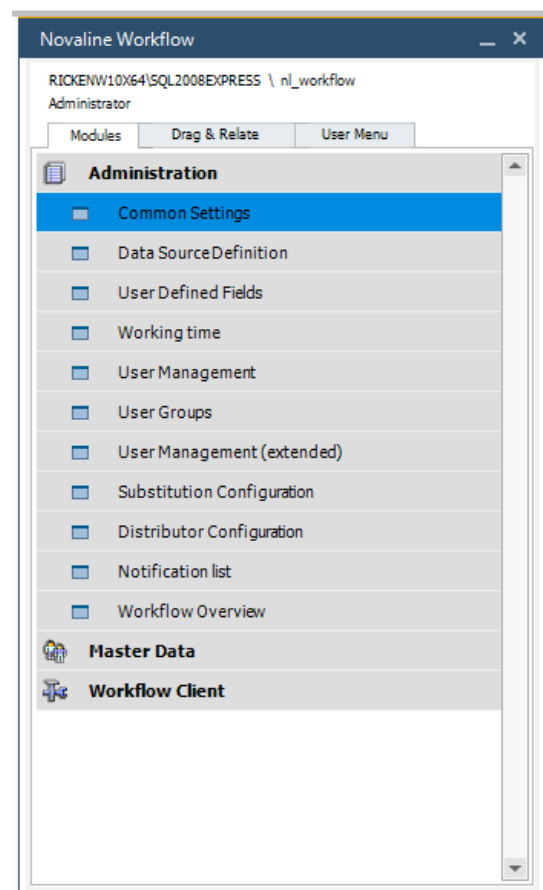
2.2 Licenses

- Company license for internal PDF viewer
- Workstation license for xPDF comments

2.3 Document recognition

If document recognition is used, you must set the PDF text recognition to either **Image Only** or **Text Only**. Our recommendation is **Image Only**.

- Open the Novaline Workflow. Go to **Administration / Common Settings**



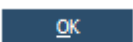
- Switch to the **Document Detection** tab and change the **Text recognition** to **Image Only**. Press the button



to accept the setting or



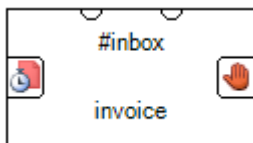
to cancel the process. Then

click on  to close the window.

2.4 Customise the workflow tasks in the Workflow Designer

In the **Workflow Designer** the workflow tasks must be adapted

- Go to **Master Data / Workflow Designer**
- Open the workflow.
- Then click on the task.



- After activating the license, the **Remarks (Anmerkungen)** section appears.
 - Allow comments in PDF documents (Kommentieren in PDF-Dokumenten erlauben) (mandatory field)
 - Allow rotation of PDF documents (Rotieren von PDF-Dokumenten erlauben) (optional field)
 - Allow changing the PDF protection (Ändern des PDF-Schutz erlauben) (optional field)

Reviser

Preselected → #inbox

Selected by previous reviser

Task

Task → invoice

Escalation time: Days

Escalation time: 2

Notify escalation recipient by e-mail

Zusätzlicher Eingangspunkt

Alignment

Escalation left, rejection right

Escalation right, rejection left

Anmerkungen

Kommentieren in PDF-Dokumenten erlauben

Rotieren von PDF-Dokumenten erlauben








Verschieben von PDF-Kommentaren erlauben

Ändern des PDF-Schutz erlauben

3. Functions

In the following, the individual functions of the PDF document processing are considered. If you tick the checkboxes in the **Notes** area in the Workflow Designer for the tasks, additional buttons appear in the bar above the document in the **Workflow Client**.



-  : Add new comment
-  : Add new mark, squiggly and strikethrough text
-  : Add stamp
-  : Rotate document
-  : Toggle all notes
-  : Further edits to the document are shown / hidden
- **Document is encrypted**  : Write protection
- : Read protection (password in the document)

3.1 Allow comments in PDF documents

By checking the box **Allow comments in PDF documents**, you can now set comments, marks and stamps. Once comments, marks or stamps have been set, they cannot be edited or removed by another user in the workflow.

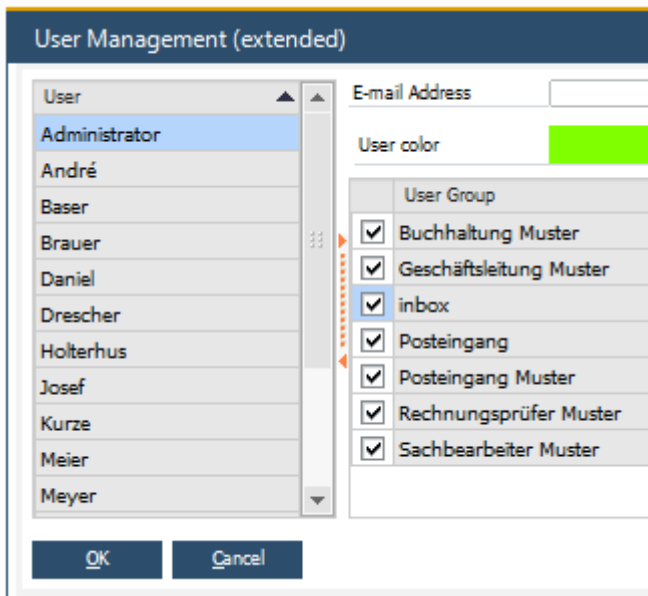
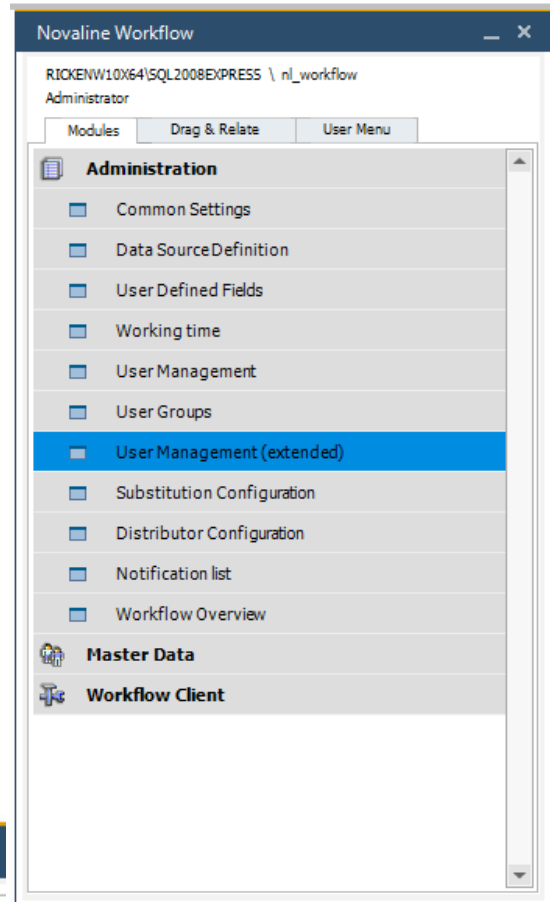
Change colour

In advance you can select a separate colour for each user. The colour difference allows you to see directly which employee in your company has made a comment or made marks in the text.

Open the Novaline Workflow. Go to **Administration / User Management (extended)**

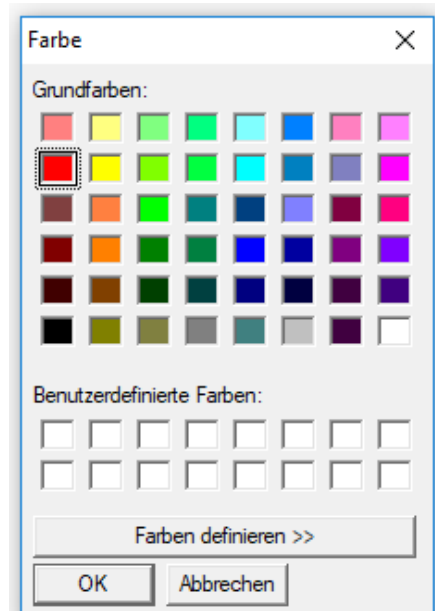
The **User Administration (extended)** window appears.

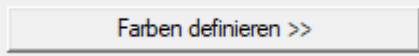
You can now select a user and see directly which user colour is used.

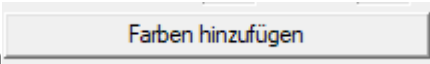
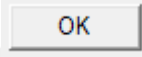
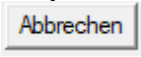


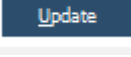
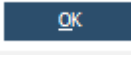
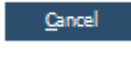
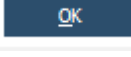
Color scheme

Now select a user and press the button




This opens the **Colour (Farbe)** window. Now click on the desired colour in the colour palette and then press .

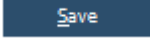
The window expands. Click on  and the colour can be seen under **Custom Colours**. If you use the button , the user colour is already displayed differently in the **User Management (extended)** window. If you click on , nothing changes.

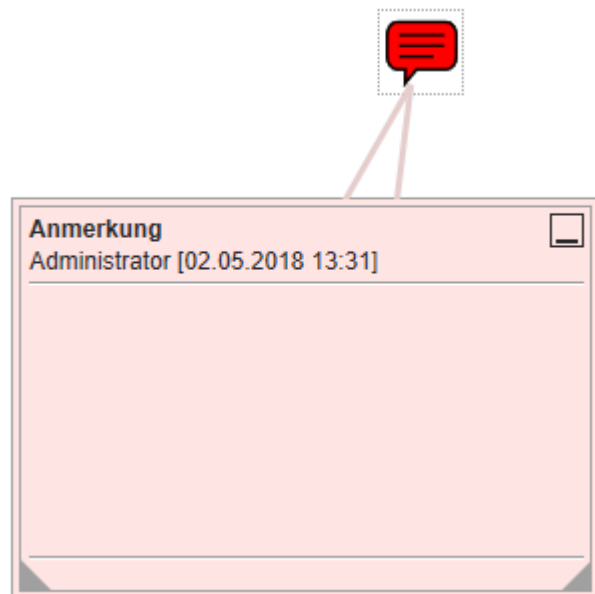
Now go to  and then to . You can use the selected colour for the user finally or you select  and  then to cancel the process.

3.1.1 Comment

To add a comment, click  the button in the bar next to the document in the **Workflow Client**.

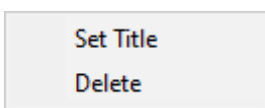
Therefore, a **speech bubble with a comment field** (note) appears that can be freely placed on the document. In the upper area there is a **title, the user name, date with the time** and a **minimise button**. Below there is a **text field** where you can write the comment.

When you have set the desired comments, press .

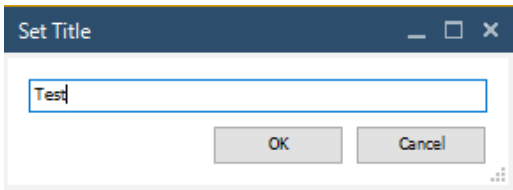


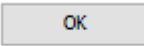
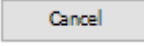
Set title

To set your **own title**, press the right mouse button in the speech bubble or in the comment field.



Now select **Set Title**.






Now you have the option of entering your own title in the text field, which will appear in the comment. Confirm with  or reject the process with .

Delete


Furthermore, you can remove the speech bubble together with the comment by not clicking on **Set Title** this time, but by going to **Delete**.

Show and hide comments


The comments can be shown or hidden in various ways:

- 1st way: Go to the button  in the bar above the document.
- 2nd way: Click Minimise within the comment .
- 3rd way: Click on the speech bubble .

Show and hide speech bubble

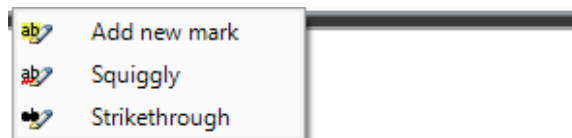
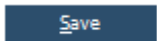
- Go to the button  in the bar above the document.

3.1.2 Mark

To mark the text, click the button  in the bar next to the document in the **Workflow Client**.

As shown in the picture, you can highlight, underline and cancel parts of the text.

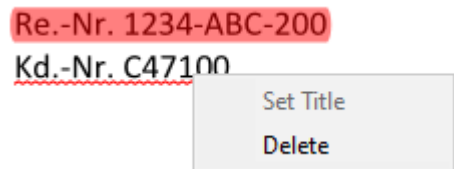
Confirm the changes made with the button




Birkenallee 177
48432 Rheine, 23.10.2017
~~Tel. 05971-8680~~

Delete


If you want to delete markings again, press the right mouse button and click on **Delete**.



Show and hide mark

- Go to the button  in the bar above the document.

3.1.3 Stamp

To set stamps, click the button  in the bar next to the document in the **Workflow Client** and select a previously created stamp.

Now place the stamp on the document.


Confirm the operation with .

Delete

If you want to delete the stamp again, press the right mouse button and click on **Delete**.



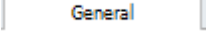
Show and hide stamps

- Go to the button  in the bar above the document.

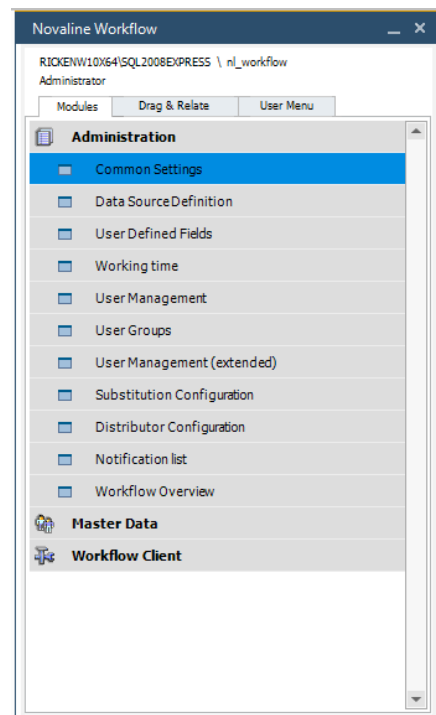
Create stamp

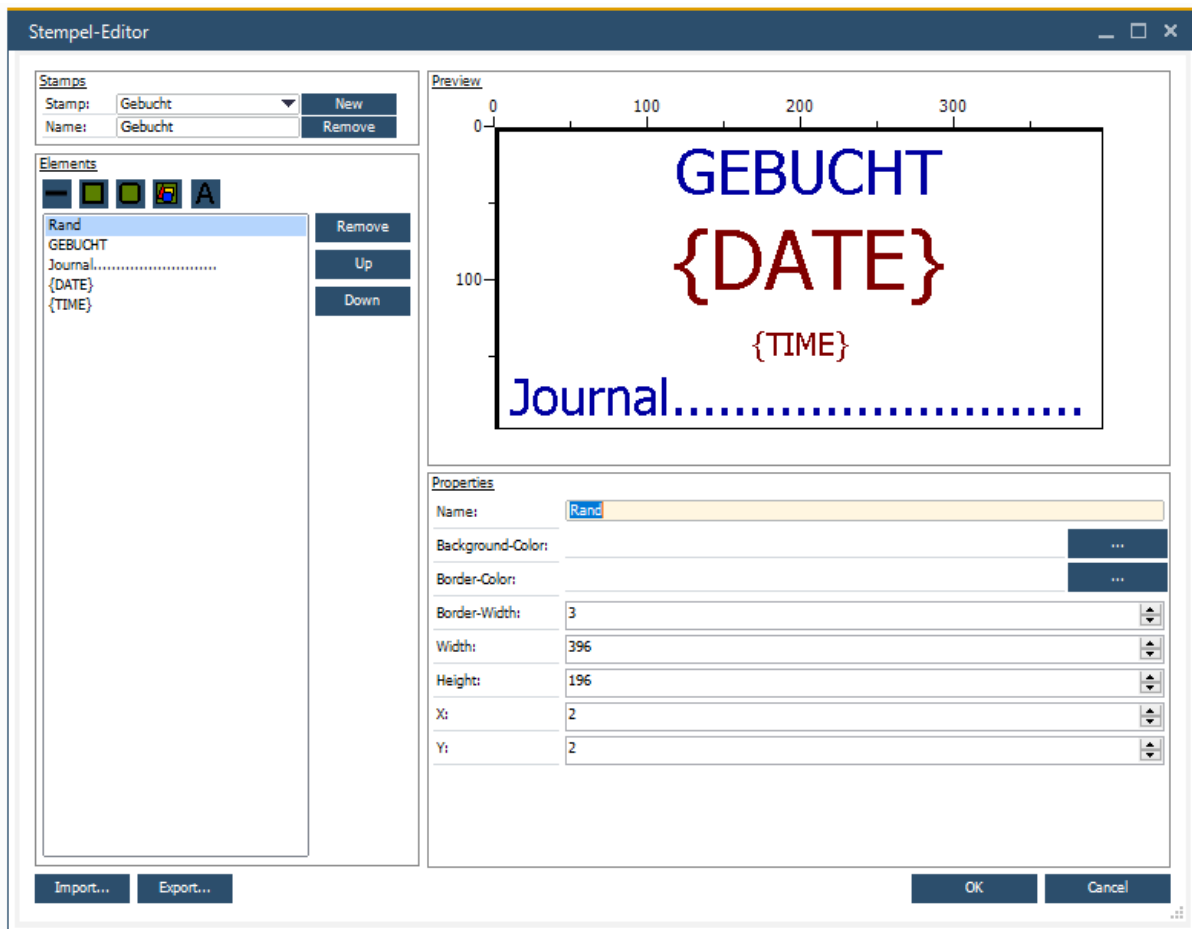
To be able to place a stamp in the document at all, you must have previously designed or imported a stamp in the **stamp editor**.

In **Novaline Workflow**, go to **Administration / Common Settings**

Then switch to the tab 

and click on the button with the three dots behind **Pdf-Stamps:**






The stamp editor opens. You have the option of importing an already created stamp via the button **Import...** or you can create a new **New** stamp, which you have to design.

Complete the two operations with **Update** and **OK** respectively. The window closes and the stamp is saved. Of course, you can also discard the settings you have made by pressing **Cancel**.

In addition, stamps that have already been created can be **Remove** or also exported via the button **Export...**.

3.2 Allow rotation of PDF documents

By ticking the allow rotation of PDF documents, you can now rotate the documents into the correct position so that the document recognition can analyse the document properly.

Please use the two buttons below  , which can be found in the bar in the **Workflow Client** next to the document.

3.3 Allow changing the PDF protection

In the following the option Allow changing the PDF protection is discussed

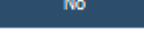

3.3.1 Write protection

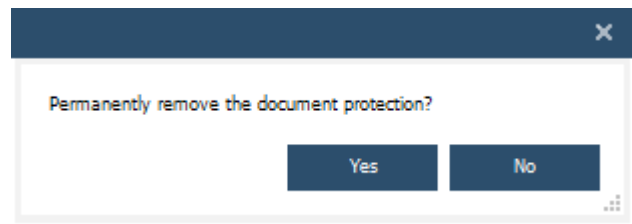
If a document is write-protected, the document is encrypted in the workflow and the document editing buttons are greyed out. As seen here



To remove the write protection, click on the button  . A message box then opens. Click on

 to permanently remove the

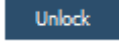
PDF protection or click  or  to perform no action.

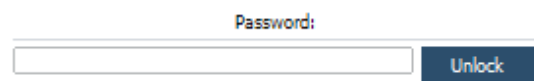


After you have removed the write protection, you can edit the document as usual.

3.3.2 Read protection

If a document is read-protected, no document appears in the workflow but a prompt to enter the password. After you have entered the password,

click on  and the document appears.



If you have entered an incorrect password, the dots in the text field will appear as a red colour and the document will not be unlocked. 