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1 novaPDF

1.1 Installing novaPDF

1.1.1 System requirements

To install novaPDF 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)

novaPDF 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 novaPDF 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 novaPDF: 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

NovaPDF 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. novaPDF 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 novaPDF

#### 1.2.1 Create PDF from any application

##### Creating PDF Files

NovaPDF installs itself as a virtual printer driver. To create PDF files from any application, you just have to print your documents to the novaPDF like you would print to a normal printer, or you can start the **novaPDF 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, novaPDF 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 novaPDF 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 novaPDF 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 novaPDF 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 novaPDF 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 novaPDF 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 novaPDF and select Printer Properties
3. In the novaPDF 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. If novaPDF is not registered, a notice is printed at the end of the PDF file. This can be removed from further created PDF files by purchasing a license and registering it.

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 novaPDF and select Printer Properties
8. In the novaPDF 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. If novaPDF is not registered, a notice is printed at the end of the PDF file. This can be removed from further created PDF files by purchasing a license and registering it.
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 novaPDF and select Properties
3. In the novaPDF 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. If novaPDF is not registered, a notice is printed at the end of the PDF file. This can be removed from further created PDF files by purchasing a license and registering it.

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

To access the novaPDF 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 novaPDF and select Printing Preferences
3. novaPDF Printing Preferences window will be displayed and you will have the option to change the various settings available

To access the novaPDF 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 novaPDF and select Printing Preferences
3. novaPDF Printing Preferences window will be displayed and you will have the option to change the various settings available

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

1.2.1.1 Select profile
The Select Profile window is displayed if the Show Select Profiles dialog option is checked on the Printing Preferences page.
PROFILES LIST
All the existing defined profiles are shown in the list-view. You have to select an existing profile you want to use for the current print job and click **OK** to continue with the printing process. Besides the **Name** of the profile, you can also see the **Type** of the selected profile, public or private.

Even if you have a profile set as active in the **Printing Preferences**, what you select in this **Select Profile** dialog is the profile that will be used for the current printing job. This window is shown even if you have the **Use predefined settings** option selected in the **Manage Profile -> General -> File saving options** section, so if you want to disable it you can go to **Printing Preferences** and uncheck **Show Select Profiles** dialog.

**Stay on top**
This is checked by default, and it makes the **Select Profile** window topmost (shown in front of other windows), this way being easily visible when there are many windows opened.

1.2.1.2 Standard save dialog
The standard save dialog is shown when the **Prompt standard save dialog** option is selected on the **General** tab (from the **Printing Preferences -> Manage Profiles** window). This allows you to select additional options for the PDF to be saved, such as its filename/location, if you want it merged with another existing PDF file (append/insert) and whether to open the PDF automatically after conversion and/or send it via email.

**FILE NAME**
In the file name field you can:
- manually type a name for the generated PDF file without specifying the path, in this case the PDF will be saved in the last used folder
- use the **Browse** button to select a location where the PDF should be saved

If a PDF file with the same name already exists in the destination, the new PDF file will either be merged with it (if you chose to do so in the **Merge with PDF file** section) or you'll be asked to overwrite it.
You can also enter network paths (UNC) in the **File name** field in case the folder where you want to save the PDF is not on the local computer. Only a full path is allowed. For example, suppose `\PDF_Server\PC1` is mapped on your workstation as drive **X**, then the following paths are both valid and indicate the same folder: `\PDF_Server\PC1\PDF` or `X:\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 (novaPDF does font subset embedding).

**PREFERENCES**

Using the options from this section you can set whether to perform an action or not after the PDF file was generated and saved.

**Merge PDF**

Check this option to insert or append the PDF being currently created with an existing one. If this option is checked you must also click on Settings to set the merging options (what file to merge with, password protecting the resulting file, ...).

**Add document info**

If you check this option (enabled by default), the resulting PDF file will include the document information that you've set in Document Information. These settings can be modified by clicking on
the Change button and only apply to the current print job. To add the same document information for all print jobs, you must open the Profile Manager and change the information in General.

**Protect PDF document**
If this option is checked, the PDF file will be encrypted based on what you've set up in the Security tab (from Manage Profiles). You can also change the encryption settings only for the current print job by clicking on Passwords (this affects only the current print job).

**ACTIONS**
The actions in this section are executed after the PDF file is generated.

**Open file**
This is selected by default. The resulting PDF file will be opened in the default PDF viewer once the conversion is finished. Uncheck it if you don't want it automatically opened.

**Send email**
If you check this option, after the PDF file is created it will be sent via email to the recipients specified in the Recipients section. If the email properties are not set, you'll get a warning letting you know that you have to configure the email sending options (otherwise you'll have to uncheck the Send email option from this page to continue creating the PDF without emailing it). You can also modify the recipients that will receive the email only for the current print job by clicking on Recipients.

**Not registered...**
If novaPDF is not registered, a message will be shown in the lower left side of this window. You can click on it to open the Activate window and copy/paste the registration name and key you received after ordering novaPDF.

Note: Some of the features mentioned on this page might not be available in your edition.

**1.2.1.2.1 Merge Settings**
Use the options on this page to decide how the current PDF file will be merged with an existing PDF. Options you set here only affect the current print job, go to the Profile Manager if you want do define merging settings for all print jobs.

**MERGE**
Using the options in this group you can select how to merge the current document you're converting with an existing PDF (selected in the File name section) - by inserting it before the existing content, after a particular page number or at the end. If the PDF file to merge with does not exist, a new PDF will be created that contains only the current document.

**If PDF file already exists in destination**
If a PDF file with the same name already exists in the selected destination, the current PDF file will be merged with the existing one, adding its pages at the end or beginning of the previous existing document (depending on what you selected in the How to add new pages section).
**Merge with another PDF file**
Use this option to select a particular PDF file you want to merge the current PDF document with. Click Browse and locate the PDF (can be outside the destination folder as well).

**HOW TO ADD NEW PAGES?**

**Append to the end**
If **Append to the end** is checked, the current PDF file will be merged with the existing one, adding its pages **at the end** of the previous existing document.

**Insert at the beginning**
If **Insert at the beginning** is checked, the current PDF file will be merged with the existing one, adding its pages **at the beginning** the content of the previous existing document.

**Insert at page number**
Use this option to insert the pages of the current PDF file **after a specific page number** from the existing document you are merging with.

### 1.2.1.2 Change Document Info

Use options on this page to modify the PDF document information for the current print job. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the **Profile Manager**.

**Title**
Sets the document title. If you use the `<N>` tag, the title will be the name of the document that is printed, as it is sent by the printing application.
Available macro tags you can use for all document information fields:
- `[N]` - The name of the document being converted
- `[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]` - Name of the workstation
- `[U]` - The Windows User name
- `[O]` - Domain
- `[F]` - The name of the PDF file
- `[L]` - Application Name
- `[R]` - Printer Name
- `[P]` - Profile Name
Subject
Sets the subject for the printed document. Default is empty.

Author
Sets the author of the printed document. If you use the <U> tag, the author will be the windows user that started the print job.

Keywords
Sets the keywords for the printed document. Default is empty.

Creator
Information included here will be displayed in the properties of the PDF under Application. By default it will use the document name, but you can add a particular name or macro.

1.2.1.2.3 Change Passwords
The Passwords window allows you to set an user/owner password for the document that will be created in the current print job. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the Profile Manager.

USER PASSWORD
You can setup a user password for opening the PDF document. If you enter a user password, the document cannot be opened without entering user or owner passwords.

OWNER PASSWORD
If the PDF Document is encrypted, access permissions can be changed only if the document is opened with the owner password.

1.2.1.2.4 Recipients
The Recipients window allows you to define a recipient/list of recipients that will receive an email after it is created, if the Send email option is set. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the Profile Manager.

You can configure next email properties:
- From address (the sender of the email, enter your address)
- To email addresses (comma separated to email multiple addresses)
- CC email addresses
- BCC email addresses

The From address is used only when sending the email with SMTP. When sending the email with the default email client, the from address will be the default address configured in your email client. You can enter multiple addresses for TO, CC and BCC.
1.2.1.3 Simple save dialog

The Simple Save Dialog window is shown during printing if the Prompt simple save dialog option is selected on the General tab (from the Printing Preferences -> Manage Profiles window). This allows you to select where the PDF file will be saved and under what filename.

File name
In the file name field you can:
- manually type a name for the generated PDF file without specifying the path, in this case the PDF will be saved in the last used folder
- browse and select a location where the PDF should be saved

By default, if a PDF file with the same name already exists in the destination you'll be asked to overwrite it. However this can be changed if you go to Manage Profiles -> General -> Save options, click on Manage to modify the current save options profile and choose what to do When file exists (besides Overwrite there's also the option to Append/Insert the PDF).

If you want to have additional options for the PDF to be saved, such as its filename/location, opening the PDF automatically after conversion and/or send it via email, you can use the Prompt standard save dialog under the Save options section.

1.2.1.4 Data Entry Wizard
1.2.1.4.1 Merge

Use the options on this page to decide how the current PDF file will be merged with an existing PDF. Options you set here only affect the current print job, go to the Profile Manager if you want to define merging settings for all print jobs.

MERGE
Using the options in this group you can select how to merge the current document you're converting with an existing PDF (selected in the File name section) - by inserting it before the existing content, after a particular page number or at the end. If the PDF file to merge with does not exist, a new PDF will be created that contains only the current document.

If PDF file already exists in destination
If a PDF file with the same name already exists in the selected destination, the current PDF file will be merged with the existing one, adding its pages at the end or beginning of the previous existing document (depending on what you selected in the How to add new pages section).

Merge with another PDF file
Use this option to select a particular PDF file you want to merge the current PDF document with. Click Browse and locate the PDF (can be outside the destination folder as well).

HOW TO ADD NEW PAGES?

Append to the end
If Append to the end is checked, the current PDF file will be merged with the existing one, adding its
pages at the end of the previous existing document.

**Insert at the beginning**
If *Insert at the beginning* is checked, the current PDF file will be merged with the existing one, adding its pages at the beginning the content of the previous existing document.

**Insert at page number**
Use this option to insert the pages of the current PDF file after a specific page number from the existing document you are merging with.

### 1.2.1.4.2 Information
Use options on this page to modify the PDF document information for the current print job. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the Profile Manager.

**Title**
Sets the document title. If you use the `<N>` tag, the title will be the name of the document that is printed, as it is sent by the printing application.

Available macro tags you can use for all document information fields:
- `[N]` - The name of the document being converted
- `[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]` - Name of the workstation
- `[U]` - The Windows User name
- `[O]` - Domain
- `[F]` - The name of the PDF file
- `[L]` - Application Name
- `[R]` - Printer Name
- `[P]` - Profile Name

**Subject**
Sets the subject for the printed document. Default is empty.

**Author**
Sets the author of the printed document. If you use the `<U>` tag, the author will be the windows user that started the print job.
Keywords
Sets the keywords for the printed document. Default is empty.

Creator
Information included here will be displayed in the properties of the PDF under Application. By default it will use the document name, but you can add a particular name or macro.

1.2.1.4.3 Passwords
The Passwords window allows you to set an user/owner password for the document that will be created in the current print job. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the Profile Manager.

USER PASSWORD
You can setup a user password for opening the PDF document. If you enter a user password, the document cannot be opened without entering user or owner passwords.

OWNER PASSWORD
If the PDF Document is encrypted, access permissions can be changed only if the document is opened with the owner password.

1.2.1.4.4 Recipients
The Recipients window allows you to define a recipient/list of recipients that will receive an email after it is created, if the Send email option is set. Note that these options apply only for the document currently being printed, they are not saved in the current profile. To have changes saved in the profile, you need to create/modify a printing profile via the Profile Manager.

You can configure next email properties:
- From address (the sender of the email, enter your address)
- To email addresses (comma separated to email multiple addresses)
- CC email addresses
- BCC email addresses

The From address is used only when sending the email with SMTP. When sending the email with the default email client, the from address will be the default address configured in your email client. You can enter multiple addresses for TO, CC and BCC.

1.3 Configuring novaPDF

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
- select an active printing profile

**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. If you cannot find a suitable predefined form you can define one for future use. Press the **Manage Forms** button and create or make visible the necessary form. For more information see the Manage Forms section.

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 novaPDF Printing Preferences dialog from the printing application, you will see these settings are automatically updated on the first page.

PROFILES
With novaPDF you can define and use printing profiles. A profile records all the settings you can change for a print job.

Use default settings
When novaPDF is first installed no printing profiles are created. Thus a set of default printing settings are used, so when you check this option the PDF files will be created based on the options that were set by default. If you want to change more than what's presented on this page, you can select Use profile and then click on Manage Profiles. This will allow you to see the current settings and define a custom profile if you want them modified.

Use profile
If you've previously defined printing profiles, they will show up in here and you'll be able to select
one to be used for the print job as the active profile. If a profile is selected, novaPDF will use the settings defined in it to create the PDF file.

Show Select Profiles dialog
If this is checked, before starting the PDF printing process, but after hitting the Print button, you'll get another prompt allowing you to select a profile you want to use for that particular print job. Even if you have a profile set as the active profile, what you select in this Select Profile dialog is the profile that will be used for the current printing job.

Manage Profiles
You can click this button to edit the settings of the current active profile, define new profiles or manage existing ones (to change save options, add watermarks, bookmarks, overlays and other settings). You can read more about the settings that can be changed on the Manage Profiles section. This opens the Profile Manager with regular user rights, not with administrator rights. To open this with administrator rights, start the profile manager from the Printer Manager window.

1.3.1.1.1 Manage Forms
In the Manage Forms window you can view, add, copy, update and delete predefined forms (page sizes/formats). The resulting PDF will have the same width and height as the form you use to generate it.
PREDEFINED FORMS LIST
The list contains essential information about the existing predefined forms, their visibility, name and description. If the check box in front is checked the predefined form will be visible in the Page size drop down list from the Printing Preferences page. Selecting a predefined form will show its properties in the fields below the list. By default the forms list will show All usable forms, however you can filter them to show which are System defined forms and the User defined forms.

New
Pressing the New button creates a custom predefined form. The fields below the list become enabled and you can enter a form name, description, size, margins and select its visibility.

Copy
Pressing the Copy button creates a custom predefined form with the same properties as the selected form. You can adjust the size and margins for the copied form.

Delete
Pressing the Delete button removes the selected predefined form. Only custom forms can be deleted, so the button is not enabled for system forms.
Units
Select the measurement units for the predefined form's width and height. The available values are millimeters, inches and points. Changing the units will recalculate the values for width and height.

Name
Short name for the selected predefined form. You can modify it if the selected predefined form is custom.

Description
A longer description of the selected predefined form. You can modify it if the selected predefined form is custom.

Visible
The visibility flag for the selected predefined form. You can show/hide both system and custom predefined forms.

SIZE
Set the custom width and height for the new predefined form up to a maximum of 3276.7 mm (or 129 inches).

Width
The width of the selected predefined form. You can modify it by entering a value or pressing the Up and Down arrows if the selected predefined form is custom.

Height
The height of the selected predefined form. You can modify it by entering a value or pressing the Up and Down arrows if the selected predefined form is custom.

MARGINS
You can define a region around the document that will remain empty when printing. Margins can be defined for all sides individually. The numbers you enter are expressed in the selected measurement unit.

Left
You can set the left margin of the page by entering a value or pressing the Up and Down arrows. The number you enter is expressed in the selected measurement unit. The sum of the left and right margins cannot exceed 2/3 of the page width. Larger values will be adjusted automatically.

Right
You can set the right margin of the page by entering a value or pressing the Up and Down arrows. The number you enter is expressed in the selected measurement unit. The sum of the left and right margins cannot exceed 2/3 of the page width. Larger values will be adjusted automatically.

Top
You can set the top margin of the page by entering a value or pressing the Up and Down arrows. The sum of the top and bottom margins cannot exceed 2/3 of the page height. Larger values will be
adjusted automatically.

**Bottom**
You can set the bottom margin of the page by entering a value or pressing the *Up* and *Down* arrows. The sum of the top and bottom margins cannot exceed 2/3 of the page height. Larger values will be adjusted automatically.

### 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.

![Printing Preferences](image)

**Getting started**
Shows shortcuts to go to the printing documents tab (you can also click on the tabs to visit those sections).

**Manage**
Quickly manage printers, profiles and licenses, assign profiles to printers and activate the printer. Options available here:

- **Manage printers.** Clicking this opens the Printer Manager where you can add, copy, modify and remove printers.
- **Manage profiles.** Opens the Profile Manager where you can create new printing profiles or modify existing ones.
- **Manage licenses.** Opens the Licensing section of the Printer Manager and you can license/unlicense computers.
- **Assign profiles.** Use it to assign a printing profile to the selected printer. Opens the Profiles tab of the Printer Manager.
- **Activate.** Opens the Activation window of novaPDF where you can activate/deactivate or change the product key.

**Monitor**

Opens the Printer Monitor that allows you to enable logging all printing actions. You can also monitor printing jobs in real-time to check their status, view, filter and export the printer history.

**Tools**

From this section you can set the user interface Language and configure the frequency of Updates. You can set a Password to protect the user interface. You can also click on **Settings** to set a custom client path for all printer server clients (this location is where multiple necessary files are stored such as licensing information).

**Send telemetry data anonymously**

We rely on user feedback for new features and updates included in the application. If this option is checked, anonymous usage data will be sent to our server.

**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 novaPDF, 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 novaPDF.

1.3.1.2.2 Password

You can easily set a password to protect the user interface of novaPDF. This way, everytime the app will be opened, a password will be required to modify its settings.

Current password
If the interface is already protected with a password, you’ll need to enter it here in order to pick a new password to protect it.

New/Confirm new password
Enter the new password and re-enter it in the Confirm field in order to set it as the new password that protects the user interface.
1.3.1.3 About

The About page contains information about the version and edition you have installed plus the option to change the interface Language and Check for updates.

novaPDF is available as a trial version. It is fully functional for 30 days. During the trial version, a notice is printed on each PDF page mentioning the novaPDF. The notice will be removed from further created PDF files when you buy and activate novaPDF. If you’ve already purchased it you can visit the Activate section to activate the program.

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 novaPDF 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 novaPDF 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 novaPDF 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.
1.3.3.1 Info

The Info profile manager tab allows you to choose predefined document info configurations or customize those to change what information will be sent as PDF properties and how the PDF document should be opened by the default PDF reader.

Add document info
If this option is checked you will be able to customize the metadata information that will be saved in the resulting PDF and show up in its properties. The Info is specific for each printed document and should be set on each printing job. You can also check the Prompt for document info option to be asked everytime during printing on what information you want to set for the document to be created.

Prompt for document info
If this option is checked, you will be prompted to enter the document info each time when you are creating a PDF file with this profile.

INFO
Options in this section can be modified only if Add document info is checked. This section allows you to configure what document info details will be set in the resulting PDF file. By default a document info preset is selected but you can manage the existing presets if you click on New/Manage. The default preset will use information from the original document when setting the properties of the
resulting PDF. For detailed explanation of each option see the Document Info section.

CUSTOM PROPERTIES

novaPDF can include extra metadata information which allows you for instance to add document copyright information.

Options in this section can be modified only if Add custom properties is checked. This section allows you to configure what valid extra meta data document info details will be set in the resulting PDF file. By default a preset is selected but you can manage the existing presets if you click on New/Manage. Detailed information on the metadata you can add is available in the Custom properties section.

COPYRIGHT

Options in this section can be modified only if Add copyright info is checked. This section allows you to configure if and what copyright info to be added in the resulting PDF file's metadata. By default a document info preset is selected but you can manage the existing presets if you click on New/Manage.

VIEW

Options in this section can be modified only if Set viewer options is enabled. You can choose one of the existing default viewer presets or manage/add new ones by clicking on the New/Manage links. For detailed explanation of each option see the View section.

Note: Some of the features mentioned on this page might not be available in your edition.

1.3.3.1.1 Custom properties

The Custom properties section is embedded in the Info tab of the Profile Manager and allows you to define custom metadata information that will be included in the generated PDF file (i.e. any name/value pair you want) as XMP metadata.
What custom properties to add?
This group allows you to choose a predefined metadata preset or use a custom one. The only preset included by default is Empty metadata, which will not add any info in the resulting PDF's metadata. You can add new or manage the existing preset by clicking on New/Manage. You can read more about predefined metadata presets in the Manage Presets->Custom properties help section. A predefined metadata preset can be used by multiple profiles, while Custom settings only affect the current profile.

Custom properties
Instead of using a predefined metadata preset you can define your own custom meta properties. Click on add and you'll be able to insert any Name/Value pairs to be included in the resulting PDF's metadata information. The custom properties fields are part of the extended metadata information and will be displayed only by PDF viewers that have support for XMP metadata (i.e. Adobe Acrobat). Optionally you can add Macro names for the Name/Value pairs that will be added as custom properties.

1.3.3.1.2 Copyright
The Copyright section is embedded in the Info tab of the Profile Manager and allows you to define custom copyright metadata information that will be included in the generated PDF file (i.e. copyright status).
What copyright to add?
This group allows you to choose a predefined copyright info preset or use a custom one. By default there are several predefined copyright presets defined, but you can add new or manage those by clicking on New/Manage. You can read more about predefined copyright presets in the Manage Presets->Copyright help section. A predefined copyright preset can be used by multiple profiles, while Custom settings only affect the current profile.

Status
Choose a copyright status for the document you are generating. It can be set as Copyrighted if the works you are generating is protected by copyright laws, Public domain if the information can be freely accessed and distributed or Unknown if you need to add custom copyright information. These values are predefined and cannot be modified.

Notice
Here you can add additional information regarding the copyright status of the document. This will be included as metadata in the PDF file you are generating.

Info URL
Add an URL where users opening the PDF and viewing its metadata can read more about the copyright status.

The Status/Notice/Info URL fields are part of the extended metadata information and will not be displayed in regular PDF viewers such as Adobe Reader. Only PDF viewers that have support for displaying extended metadata information will display these fields (i.e. Adobe Acrobat).

1.3.3.2 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. novaPDF 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 novaPDF for converting) has the text
  `MyTag=sales@novapdf.com`
- You define in `novaPDF - 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.

**1.3.3.2.1 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. novaPDF 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 novaPDF for converting) has the text
  MyTag=sales@novapdf.com
- You define in novaPDF - 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, novaPDF 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**

novaPDF 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 novaPDF 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, novaPDF 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.

**1.3.3.2.2 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.

1.3.3.3 Manage Presets

1.3.3.3.1 Document

1.3.3.3.1.1 Custom properties

The Custom properties metadata section is embedded in the Info tab of the Profile Manager and allows you to define custom metadata information that will be included in the generated PDF file.
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 novaPDF 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 novaPDF 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.

CUSTOM PROPERTIES
This section allows you to add new custom properties to be included in the resulting PDF file. The predefined preset included will add an empty Name/Value custom metadata property in the resulting PDF. You can easily define your own preset that adds custom properties.

Name/Value
Add a name of the custom property you want to be displayed in the resulting PDF and assign a value to it. This will be viewable in the properties of the resulting PDF with a PDF reader. You can also use
Macro values for generating these dynamically.

**Add/Copy/Remove**
You can add multiple custom properties and manage those (copy/delete). They will be included in the resulting PDF in the order they are displayed in the list of Custom Properties.

### 1.3.3.3.1.2 Copyright
The Copyright section is embedded in the *Info* tab of the *Profile Manager* and allows you to define custom metadata information that will be included in the generated PDF file (i.e. copyright status).

![Profile Manager](image)

**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 novaPDF 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 novaPDF 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.

Status
Choose a copyright status for the document you are generating. It can be set as *Copyrighted* if the works you are generating is protected by copyright laws, *Public domain* if the information can be freely accessed and distributed or *Unknown* if you need to add custom copyright information. These values are predefined and cannot be modified.

Notice
Here you can add additional information regarding the copyright status of the document. This will be included as metadata in the PDF file you are generating.

Info URL
Add an URL where users opening the PDF and viewing its metadata can read more about the copyright status.

The Status/Notice/Info URL fields are part of the extended metadata information and will not be displayed in regular PDF viewers such as Adobe Reader. Only PDF viewers that have support for displaying extended metadata information will display these fields (i.e. Adobe Acrobat).
1.3.3.3.2 Other

1.3.3.3.2.1 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.

![User tags preset management interface](image)

**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 novaPDF 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 novaPDF 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. novaPDF 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 novaPDF for converting) has the text
  \[MyTag=sales@novapdf.com\]
- You define in \[novaPDF - Profile Manager - Other - User tags\] 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 afterwards 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, novaPDF 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
novaPDF 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 novaPDF 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, novaPDF 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.

1.3.3.3.2.2 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 novaPDF 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 novaPDF 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.

1.3.3.3.3 Email

1.3.3.3.3.1 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 novaPDF 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 novaPDF 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 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 novaPDF 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.
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 novaPDF 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.
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