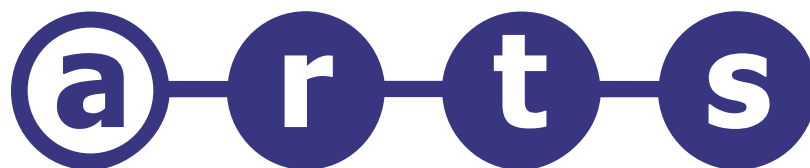
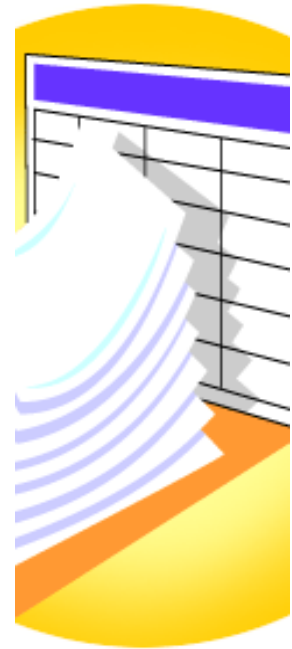


# ARTS PDF Variform Lite

Version 1.3



[www.artspdf.com](http://www.artspdf.com)

# TABLE OF CONTENTS

<b>1.0</b>	<b>INTRODUCTION.....</b>	<b>3</b>
1.1	Product Highlights .....	4
<b>2.0</b>	<b>ARTS PDF VARIFORM LITE SETUP .....</b>	<b>5</b>
2.1	System Requirements .....	5
2.1.1	Macintosh.....	5
2.1.2	Windows .....	5
2.2	Installation .....	5
2.2.1	Demo Mode .....	5
<b>3.0</b>	<b>USING ARTS PDF VARIFORM LITE .....</b>	<b>6</b>
<b>4.0</b>	<b>ACROBAT FORM FIELDS .....</b>	<b>7</b>
4.1	Appearance .....	8
4.2	Options .....	8
4.3	Actions.....	8
4.4	Format .....	8
4.5	Validate .....	9
4.6	Calculate .....	9
<b>5.0</b>	<b>PREFERENCES .....</b>	<b>10</b>
5.1	Default Data File Folder .....	10
5.2	Embed Custom Fonts.....	10
5.3	Ignore Field Formats .....	10
<b>6.0</b>	<b>SETUP .....</b>	<b>11</b>
6.1	Data File .....	11
6.2	Delimiter .....	12
6.3	Field Highlighting Options .....	12
6.4	Custom Fonts .....	12
<b>7.0</b>	<b>PRINT.....</b>	<b>14</b>
7.1	Print Records:.....	14
7.2	Page Range .....	14
7.3	Print to .....	14
7.4	File Options .....	15
<b>8.0</b>	<b>EXPORT FIELD NAMES .....</b>	<b>16</b>
8.1	Export Options.....	16
<b>9.0</b>	<b>WATCHED FOLDERS.....</b>	<b>17</b>
9.1	Watched Folder Setup.....	18
<b>10.0</b>	<b>TROUBLESHOOTING.....</b>	<b>19</b>

## 1.0 INTRODUCTION

Welcome to personalized printing with Adobe® Acrobat® forms and ARTS PDF Variform Lite™ from ARTS PDF™.

ARTS PDF Variform Lite extends Acrobat forms and overcomes several restrictions that limit their usability.

With Acrobat versions to date, the rendering of text fields has been limited to a small set of fonts (Courier, Times, Helvetica, Symbol, and Zapf Dingbats). This effectively eliminates the use of Acrobat forms for a number of popular appearance-critical applications, such as, mail merge, invitations, certificates, etc, or where organization-identity fonts are required.

But perhaps a greater restriction is that Acrobat forms were designed for web server-based applications. So for anyone to consider an Acrobat forms application, this immediately brings to mind a significant “forms project” and trying to enlist the help of IT or MIS department. Such prospects are either beyond the reach of most individuals, difficult to implement given organizational constraints, beyond available budgets, or achievable in the next decade.

ARTS PDF believes that there are literally millions of private databases. These exist in the form of word processing documents, spreadsheet files, PC databases, and even custom query results from large databases. These all share the common trait that they can be represented in a simple delimited text file on a personal computer.

Adobe’s Acrobat forms plug-in allows virtually any PDF document created from virtually any desktop application to be turned into a variable data form. But please remember that the term “form” is used in the general sense. It can include multi-line blocks of text. The definition is only restricted by our imaginations.

Combining the freedom of independent Acrobat forms design and ARTS PDF Variform Lite’s local access means that general usage of Acrobat forms can be extended to individuals, small or home offices, small businesses, self-employed professionals, branch offices, corporate departments, membership organizations, etc.

## **1.1 Product Highlights**

ARTS PDF Variform Lite provides a set of tools for managing and printing data from external files to PDF forms documents. With ARTS PDF Variform Lite, you can control the fonts used in printing forms, specify the range of records from a data file to be printed and extract form field names from an existing Acrobat form document to an external file.

Data files can be created from any application or database which is capable of exporting records to a delimited file. ARTS PDF Variform Lite supports tab, comma, semicolon or space-delimited formats.

Any Acrobat form document using form fields and appropriate security settings can be used as a merge document.

Merged data can be printed to any PostScript printer or to a PostScript file. New, merged PDF documents can be created by ARTS PDF Variform Lite by printing directly to the Acrobat Distiller printer or by printing to a PostScript file and then using Acrobat Distiller. Subsequently, these merged PDF documents may be printed on any PCL or PostScript printer.

## 2.0 ARTS PDF VARIFORM LITE SETUP

### 2.1 *System Requirements*

#### 2.1.1 Macintosh

- PowerMacintosh G3 or G4
- System 9.2 or 10.2 or higher
- Adobe ® Acrobat ® 5.05 or higher

#### 2.1.2 Windows

- PC with Pentium processor
- Windows ® NT 4.0, Windows ® 2000 or Windows ® XP
- Adobe ® Acrobat ® 5.05 or higher

CAUTION: Any folders or files which are created during installation are required by ARTS PDF Variform Lite. If you rename, move, or delete these folders the product will not work correctly.

### 2.2 *Installation*

In addition to the User's Guide, the ARTS PDF Variform Lite folder contains other support files needed by ARTS PDF Variform Lite. The installation CD also has some sample PDF documents that demonstrate different data merge applications. The sample files are not installed to your hard disk.

ARTS PDF Variform Lite will use and PostScript or TrueType fonts installed on the system for font selection.

To validate the software's registration and/or to view the installation status, open Acrobat and view the "About Plug-Ins" box at the bottom of the Acrobat Help pulldown menu for "ARTS PDF Variform Lite...". The word "\*\*\*\*Unregistered\*\*\*\*" appears in the ARTS PDF Variform Lite "About" box when the version is not fully licensed. To validate your license, click on the "Register..." button, and then enter the serial number provided by ARTS PDF.

To deactivate the plug-in, move it and the ARTS PDF Variform Lite folder out of the Acrobat Plug-Ins folder before launching Acrobat.

#### 2.2.1 Demo Mode

When ARTS PDF Variform Lite is in demo mode it will print DEMO on all output. Otherwise, the demo version of ARTS PDF Variform Lite is identical to the licensed version.

### 3.0 USING ARTS PDF VARIFORM LITE

To use the software, select “ARTS PDF Variform Lite” from the Acrobat “Tools” pulldown menu. Alternatively, you can launch ARTS PDF Variform Lite using the tool button on the Acrobat toolbar. ARTS PDF Variform Lite will then display its print dialog box.

- ☒ Note: ARTS PDF Variform Lite must temporarily modify a PDF document during the data merge/print operation. For this reason it cannot be used with PDF documents which have security settings applied. In order to use ARTS PDF Variform Lite it will be necessary to remove document security before attempting to merge a data file.

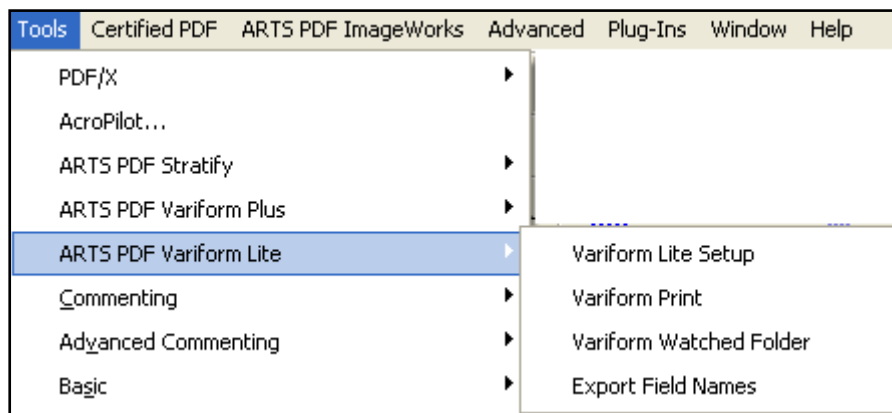


Figure 1: The ARTS PDF Variform Plus menu

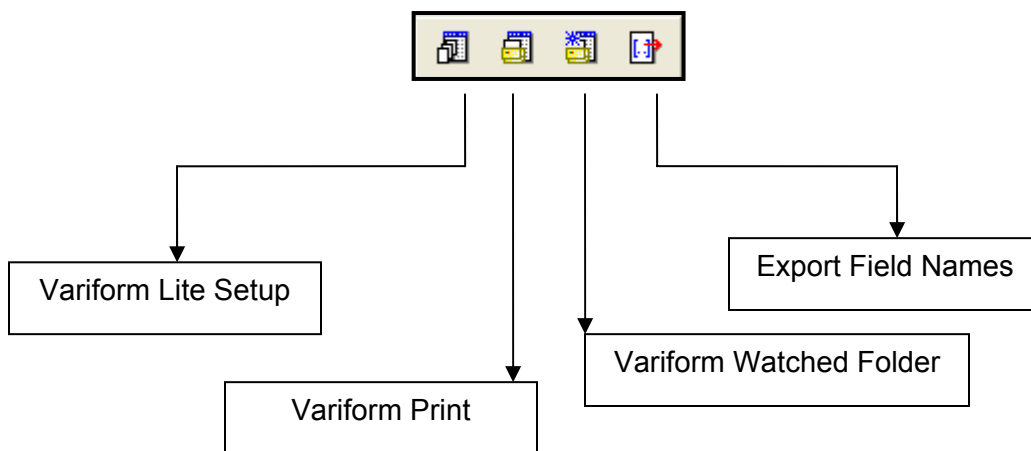


Figure 2: The ARTS PDF Variform Plus toolbar

## 4.0 ACROBAT FORM FIELDS

There are currently seven different types of form fields which can be created in Acrobat 4. These are described briefly below. Due to the nature of certain form field types, ARTS PDF Variform Lite will only merge data into Combo boxes or Text boxes. If other field types are used with ARTS PDF Variform Lite the resulting output for those fields will be blank. If there is a need to include items which would normally be indicated in a Check Box, the user should design the form using a Text box and put the appropriate character for “checked” in the data file. As an example, design the form to use the Zapf Dingbats font and put the numeral 3 or 4 in the data file for this field. This will cause a  or  to appear in the merged file. Consult the Acrobat documentation (Help -> Acrobat Guide) for more information on creating Acrobat forms.

- **Buttons** allow you to activate a series of actions.
- **Check boxes** allow your user to make multiple selections from a group of items.
- **Combo boxes** allow you to specify a **list** of items that appear in a pop-up menu.
- **List boxes** allow the user to create a list of items in a form field that displays all the time. Text boxes allow you to create a field into which you can enter text using the keyboard.
- **Radio buttons** allow your user to select one item from the displayed options.
- **Digital signature** fields allow you to create a form field that your user can then fill in with a signature and a printable representation. This field can be set to lock other fields after it is signed.
- **Text boxes** allow you to create a field into which you can enter text using the keyboard.

## 4.1 Appearance

When creating form fields, Acrobat allows the user to define a number of items affecting the field's appearance. These include such things as border color, width, and style, background color, text color, font and font size. ARTS PDF Variform Lite supports all of these choices and the output from ARTS PDF Variform Lite will include them. The user may also choose whether the form field is read only and/or required. Neither of these has any effect on ARTS PDF Variform Lite's ability to merge and print the data. Finally, the user has several choices about the form field's visibility. The only choice here which has any effect on ARTS PDF Variform Lite is "Visible but doesn't print". Although the data will be merged, for obvious reasons, it will not appear in the output from ARTS PDF Variform Lite.

## 4.2 Options

Acrobat allows the user to enter a default value for a form field, set the text alignment, choose whether the field supports multi-line input, limit the number of characters which can be entered in a field, treat the field as a password. Although ARTS PDF Variform Lite supports all of these options, the user should exercise care when implementing a limit on the number of characters or the password option. If the data to be merged exceeds the character limit for the field, ARTS PDF Variform Lite will still print it, but the data will be truncated. Selecting the password option causes data for that field to be displayed as "\*\*\*\*\*" and ARTS PDF Variform Lite will print it as such.

## 4.3 Actions

The user may define actions which occur when certain events take place. This is primarily related to manual entries in forms and has no effect on ARTS PDF Variform Lite's ability to merge and/or print.

## 4.4 Format

Acrobat allows the user to select from predefined formats or create custom formats for the data to be entered into a field. Although ARTS PDF Variform Lite supports the use of these formats, care should be exercised when defining them. If the format for a field is different than the format of the data in a file to be merged, ARTS PDF Variform Lite will report an error whenever it encounters a data entry which does not match the form field's defined format. This can be overridden by selecting "Ignore Field Formats" in ARTS PDF Variform Lite's [Preferences](#).

## 4.5 *Validate*

When a field's format is numeric, Acrobat allows for validation of the data entry. As with the Format option (above), ARTS PDF Variform Lite supports the use of validations, but care should be exercised when defining them. If the data in a file to be merged does not meet the validation criteria, ARTS PDF Variform Lite will report an error whenever it encounters a data entry which does not meet the form field's defined validation requirement. This cannot be overridden by ARTS PDF Variform Lite.

## 4.6 *Calculate*

When form fields have a numeric format, Acrobat allows the user to specify calculations to be performed on two or more such fields. ARTS PDF Variform Lite supports the use of calculations and the merged output will include the results of any calculations defined in the form.



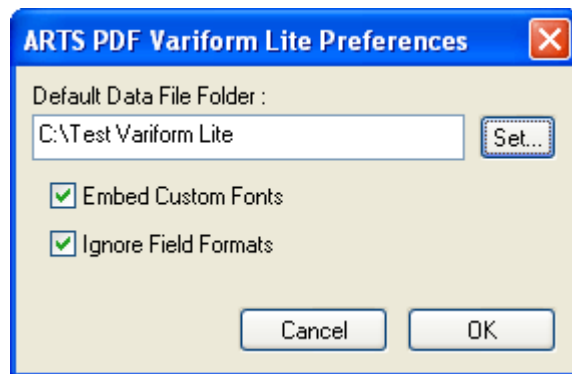
Note: In order for calculations to merge correctly you may not use a custom font for the field which contains the calculations. This is because ARTS PDF Variform Lite must put additional data for the custom font in the field when performing a merge.

## 5.0 PREFERENCES

The preferences for ARTS PDF Variform Lite can be set using the standard Acrobat method of File -> Preferences -> ARTS PDF Variform Lite. After making changes in this window click “OK” to make them permanent. Clicking “Cancel” will return the preferences to the last values stored.

### 5.1 *Default Data File Folder*

This determines the default path where ARTS PDF Variform Lite will look for data files when it is launched. The path may be entered manually, or by using the “Set...” button to browse to select a folder.



### 5.2 *Embed Custom Fonts*

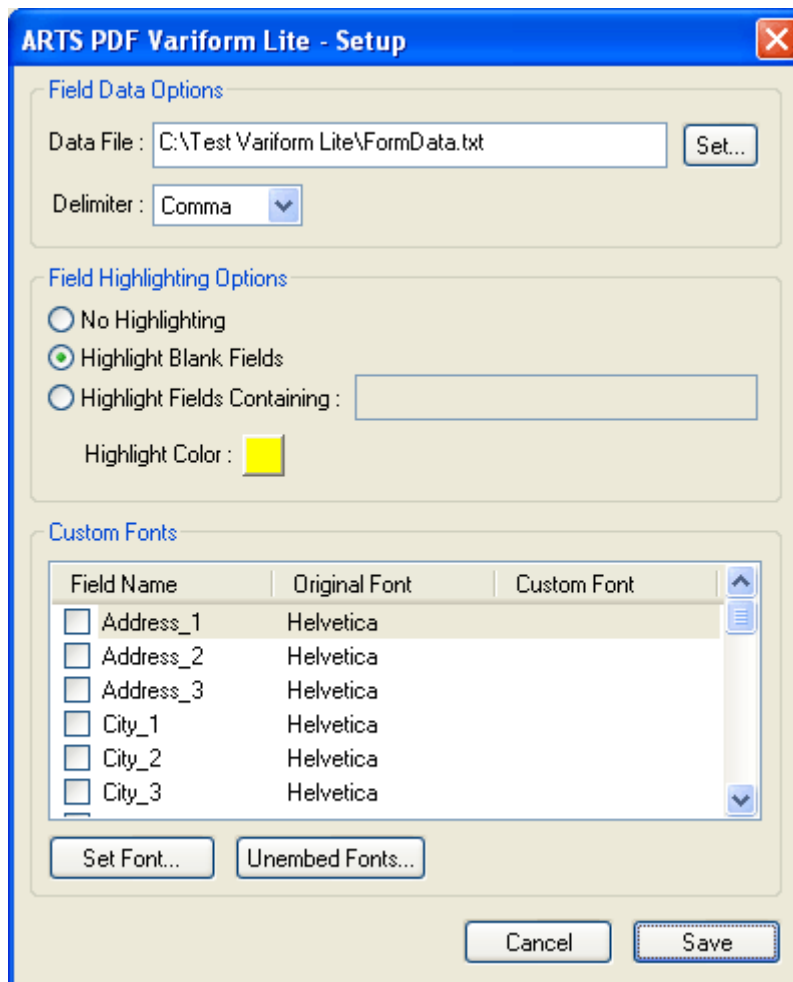
Selecting “Embed Custom Fonts” here will embed any custom fonts in the saved PDF, otherwise they are not embedded. If no custom fonts are selected using the “Select Fonts” function then this setting has no effect. There are two cases which can cause fonts to be embedded. First, selecting custom fonts, then saving the file will embed them. Second, printing a file with custom fonts, then closing the file without saving it will cause Acrobat to prompt the user to save the file. Answering “yes” will save and embed the fonts. Answering “no” will save the file without embedding the fonts.

### 5.3 *Ignore Field Formats*

This function allows ARTS PDF Variform Lite to ignore all Acrobat form field formats when merging data. This may permit the successful merging of data when the form field format would otherwise cause an incorrect or no data merge.

## 6.0 SETUP

The ARTS PDF Variform Lite Setup window allows the user to select all of the parameters necessary to merge an external file with the Acrobat form.



### 6.1 Data File

This box contains the path and file name of the data file to be used for merging. The information may be typed in manually, or the user can use the “Set...” button to browse the hard disk to select a file. The initial default for this field is blank, or no entry. The default path may be changed by setting the preferences for ARTS PDF Variform Lite.

- ✉ Note: Data files must have the field names in the first line of the file. Also the field names must exactly match the names of the Acrobat form fields.

## 6.2 Delimiter

This drop-down list is used to select the type of delimiter used in the data file. Valid delimiters are Tab, Comma, Semicolon, or Space. If the delimiter selected does not match what ARTS PDF Variform Lite finds in the data file, a warning message will appear and printing will not be allowed until the correct choice is made.

## 6.3 Field Highlighting Options

- **Highlighting**

There are three options for highlighting fields in the output.



Note: 'No Highlighting' is the default. ARTS PDF Variform Lite will not apply any highlighting when merging data.

- **Highlight Blank Fields:**

Choosing this option will cause any field which does not contain data from the data file to be highlighted in the output.

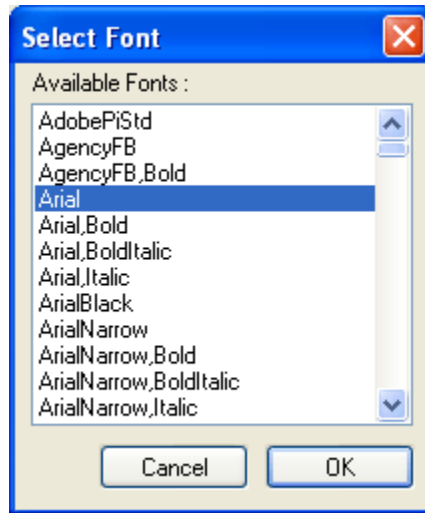
- **Highlight Fields Containing:**

This allows the user to specify a text string that will cause highlighting in the output if the data file contains that text.

## 6.4 Custom Fonts

The "Custom Fonts" section of the ARTS PDF Variform Lite Setup will display all of the Field Names from the current PDF, the font name assigned to that form field by Acrobat and the custom font, if any, to be used when printing the document using ARTS PDF Variform Lite. Custom Fonts may be selected in one of two ways. Double-clicking on an entry in the list will launch the "Select Font" window. Selecting an entry, then clicking on "Set Font..." will also launch "Select Font..." To enable the use of custom fonts when printing the box next to the field name must be "checked". To turn off the use of one or more custom fonts simply uncheck the box(es). Likewise, to re-enable check the box(es) again.

The Select Font window will display all of the fonts currently installed on the system. This includes both PostScript and TrueType fonts. To change the fonts assigned to a form field, select the font name from the list and click “OK”. To return to the ARTS PDF Variform Lite Setup Dialog without making a change, click “Cancel”.



- ✉ Note: If custom fonts are selected and/or used Acrobat will prompt the user to save the file when closing it. If the file is saved, the custom font selections will be stored in the PDF and will appear the next time the document is opened. Also see [Setting Preferences](#) for information on embedding custom fonts in the PDF.

## 7.0 PRINT

### 7.1 *Print Records:*

The user can choose to print all of the data records in the source file or a selected range. ARTS PDF Variform Lite will automatically parse the data file to determine the total number of records. The result will be displayed in the “to” field.

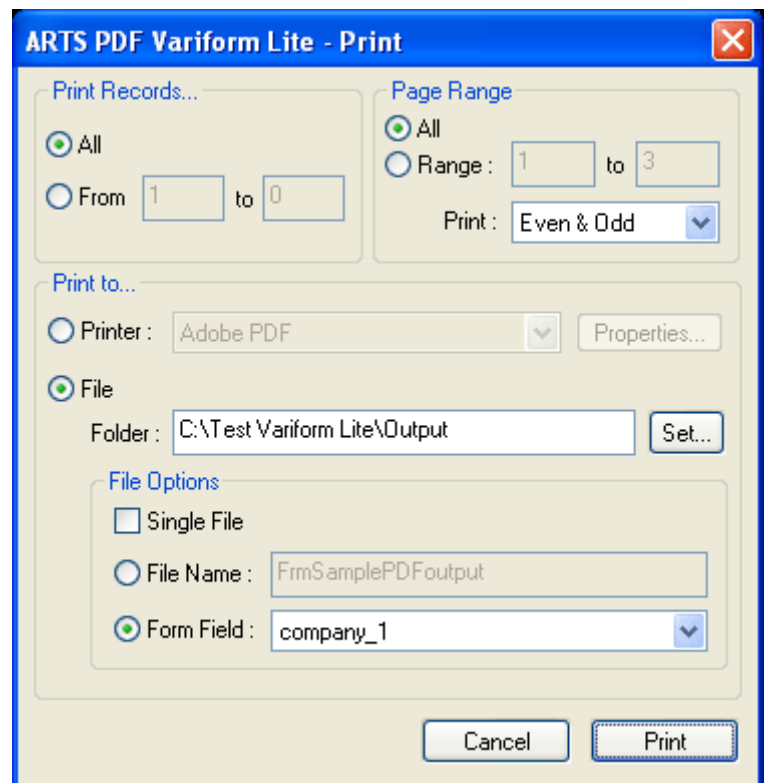
### 7.2 *Page Range*

If a form has more than 1 page, this section of the Print window can be used to specify whether all pages, a specific range of pages, or even and/or odd pages are to be merged.

### 7.3 *Print to*

This section of the window allows the user to select a Printer or File as the output destination. The choices listed for printer will be all of the printers currently installed on the system where ARTS PDF Variform Lite is being used.

If “File” is selected the user may specify a destination folder for the output. The “Folder” name may be entered manually by typing in the complete path, or by using the “Set...” button to browse for one.




## 7.4 File Options

“Single File” is a checkbox which indicates whether the output should be a separate PostScript file for each record in the data file, or one consolidated file.


The “File Name” may be entered manually. Entry of a file name will be active only when “Single File” is ON (checked). The initial default file name will be the same as the name of the PDF document being used for this job.

**Caution:** If “Single File” is turned OFF and the user does not select “Form Field” then ARTS PDF Variform Lite will create multiple PostScript files using the file name currently displayed in the “File Name” field and add a numerical suffix to each file. For example, if the file name shown was “myform.ps” and there are 3 records to be merged the resulting file names will be myform0.ps, myform1.ps, and myform2.ps.

“Form Field” will become active only when “Single File” is OFF (unchecked). This allows the user to pick from a list of the form field names in the PDF. The data for that field will be used as the file name. For example if the user picks “Last Name” from the list of fields, each PostScript file will use the data for that field to name the PostScript file. So, if there are 3 records with the names Jones, Anderson, and Smith, the PostScript file names will be Jones.ps, Anderson.ps, and Smith.ps. This is particularly useful if the PostScript files are to be later turned back into PDF documents using Acrobat Distiller which would create be Jones.pdf, Anderson.pdf, and Smith.pdf documents.

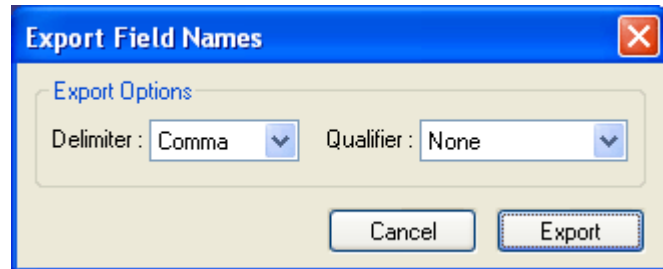
-  Note: The output from ARTS PDF Variform Lite is PostScript. This is true whether printing to a printer or to a file. To print to a non-PostScript printer, first make a merged PDF then use Acrobat’s print function to output the merged file to other types of printers.

## 8.0 EXPORT FIELD NAMES

The “Export Field Names” window can be accessed by selecting “Export Field Names” from the Acrobat “Tools” pulldown menu, or by clicking on the  button on the Acrobat toolbar.

In order to correctly merge data with an Acrobat form, ARTS PDF Variform Lite requires that the field names in the PDF and those in the data file exactly match.

✉ Note: Data files must have the field names in the first line of the file.



The “Export Field Names” function is particularly useful when the user does not know the field names used in the Acrobat document, or when there are a large number of field names and comparing them with the field names in the data file would otherwise be difficult. This function allows the user to export the Acrobat form field names to a text file so that they can be used to ensure that the field names in the data file match.

### 8.1 Export Options

- **Delimiter:**

This list allows the user to select the type of delimiter to be used to separate field names in the exported file. Choices are Tab, Comma, Semicolon, or Space


- **Qualifier:**

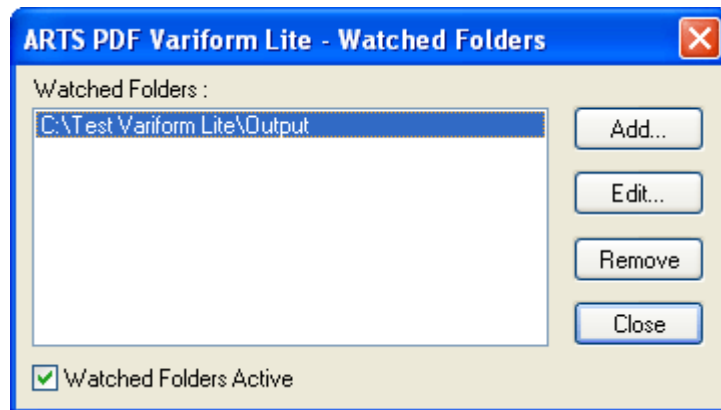
This allows the user to specify how field names which contain the selected delimiter are to be identified in the exported file. Choice are “None”, “Double-quote(”), or “Single-quote (’)”. As an example, if a field name contains a comma (last name, first name) and the selected delimiter is also comma and no qualifier is chosen, then the exported file would treat “last name” and “first name” as two separate fields. By using a qualifier such as Double-quote, the exported file would contain “last name, first name” so that they will be recognized as a single field. If a field name has the selected delimiter in it and no qualifier is selected, ARTS PDF Variform Lite will automatically use a Double-quote qualifier so that errors do not occur.

## 9.0 WATCHED FOLDERS

ARTS PDF Variform Lite Watched Folders is a “hot folders” approach to automation. First you select an existing folder on your hard disk to act as a watched folder, next choose an Acrobat form to associate with the folder, then select a delimiter and your output options and you are ready. After everything is set up, make sure that Acrobat has been launched, then simply drop data files that you want processed in the appropriate watched folder.

ARTS PDF Variform Lite Watched Folders is activated by

clicking the  icon on the Acrobat menu bar. When activated, the dialog window will display any existing watched folders. From this window the user may add a new watched folder, and edit or remove an existing folder.

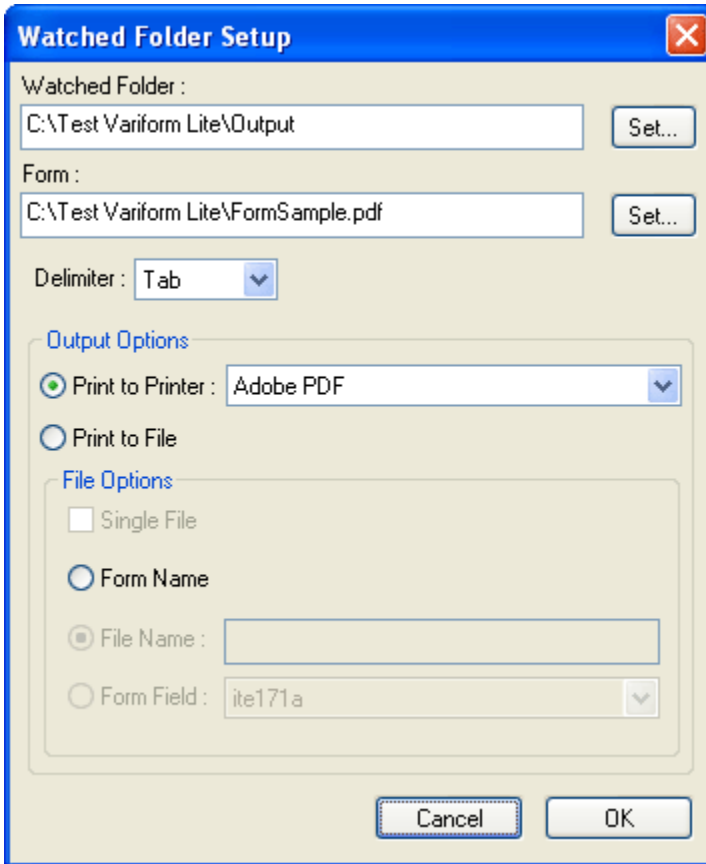


- ✉ Note: A separate watched folder is required for each Acrobat form which the user desires to automate.

The box titled “Watched Folders Active” is used to activate or deactivate the automatic processing of data files. When this box is checked and Acrobat is running, any valid data file placed in the watched folder will be processed automatically. If the box is unchecked, any data files placed in the watched folder will not be processed until watched folders are again activated by checking this box.

## 9.1 Watched Folder Setup

ARTS PDF Variform Lite will automatically create three folders inside each selected watched folder. First is a folder labeled “Success”. This is where data files will be moved after they have been successfully processed. Second is a folder called “Output”. This folder will contain the PostScript file(s) from the merge activity if “Print to File” was selected. The third folder is named “Error”. This is where any files which fail to process will be placed.



When active, ARTS PDF Variform Lite constantly scans the watched folders. When it sees a new data file to be processed, it will begin the merge process using the settings for that watched folder. Upon completion, the data file will be moved to the Success Folder. If ARTS PDF Variform Lite finds a file type other than a delimited data file in the watched folder, it moves it to the Error Folder. Normally output is delivered to the selected device, but for “Print to File”, the resultant output file is delivered to the Output Folder.

If the user wishes to use ARTS PDF Variform Lite directly (non-automated), he may do so at any time. This direct control by the user only temporarily suspends automated operation.

- ✉ ARTS PDF Variform Lite Watched Folders is intended to automate the merging of a complete set of records to all pages of a PDF form. Therefore, there are no settings for specifying a range of records or pages when using watched folders to automate ARTS PDF Variform Lite.

## 10.0 TROUBLESHOOTING

Before contacting us please check the ARTS PDF Variform Lite conference at the ARTS PDF Forum on our web site at: <http://forum.artspdf.com>

If you have no luck there, please e-mail [techsupport@artspdf.com](mailto:techsupport@artspdf.com) and supply the information below to help us replicate the problem you are experiencing.

- a. The exact version of ARTS PDF Variform Lite you are using (this is located by running ARTS PDF Variform Lite, and then clicking Help → About Third-Party Plug-Ins → ARTS PDF Variform Lite). Please also specify whether you are using a demo or full registered version.
- b. Whether or not you purchased Maintenance with ARTS PDF Variform Lite. If you did purchase Maintenance, please supply your ARTS PDF Variform Lite serial number.
- c. The exact version of Adobe Acrobat you are using (this is located by running Adobe Acrobat, and then clicking Help → About Acrobat).
- d. Whether you are running it on a PC or Macintosh and the exact version of the Operating System you are using.
- e. The amount of free disk space remaining.
- f. The CPU speed and amount of RAM for the system on which ARTS PDF Variform Lite is running (e.g. Pentium 233 MMX, 32MB RAM).
- g. Any other programs that are running at the time of the error (e.g. Outlook, Internet Explorer, etc).
- h. All error messages that were displayed when the error occurred.
- i. The exact series of steps that led to the error.

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### Feedback

If you have ideas and suggestions on how we could improve ARTS PDF Variform Lite, we would love to hear your thoughts. Please send them to [info@artspdf.com](mailto:info@artspdf.com)

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