



# Variform PDF

## User's Guide

*August 15, 2003*

Dear Customer,

Lantana and ARTS PDF are proud to announce that ARTS PDF has acquired and will continue development and technical support for the full range of products developed by Lantana.

To download or seek technical support on the range of Lantana products please visit the ARTS PDF web site at <http://www.artspdf.com>.

Please direct sales inquiries to [info@artspdf.com](mailto:info@artspdf.com)

Please direct technical support inquiries to: [techsupport@artspdf.com](mailto:techsupport@artspdf.com)

If you have any questions regarding the changes please contact us and we will be happy to assist you.

Kind regards,

The ARTS PDF Team.

ARTS PDF - We Live For PDF  
<http://www.artspdf.com>

Ver. 1.2

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### Introduction

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Welcome to personalized printing with Acrobat forms and Variform PDF™ from Lantana™.

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

Acrobat forms were designed with web server-based applications in mind. 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.

Lantana 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 Variform PDF’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.

### Product Highlights

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Variform PDF provides a set of tools for managing and printing data from external files to PDF forms documents. With Variform PDF, 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. Variform PDF 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 Variform PDF 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.

## About Your Product Installation

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Congratulations on completing the installation of Variform PDF. Below is additional information to ensure proper performance.

### System Requirements

#### Macintosh

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

#### Windows

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

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

### Variform PDF Installation

In addition to the User's Guide, the Variform PDF folder contains the Software License, and other support files needed by Variform PDF. 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.

Variform PDF 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 "Variform PDF...". The word "\*\*\*\*Unregistered\*\*\*\*" appears in the Variform PDF "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 Lantana.

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

- ☒ *Note: Variform PDF 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 Variform PDF it will be necessary to remove document security before attempting to merge a data file.*

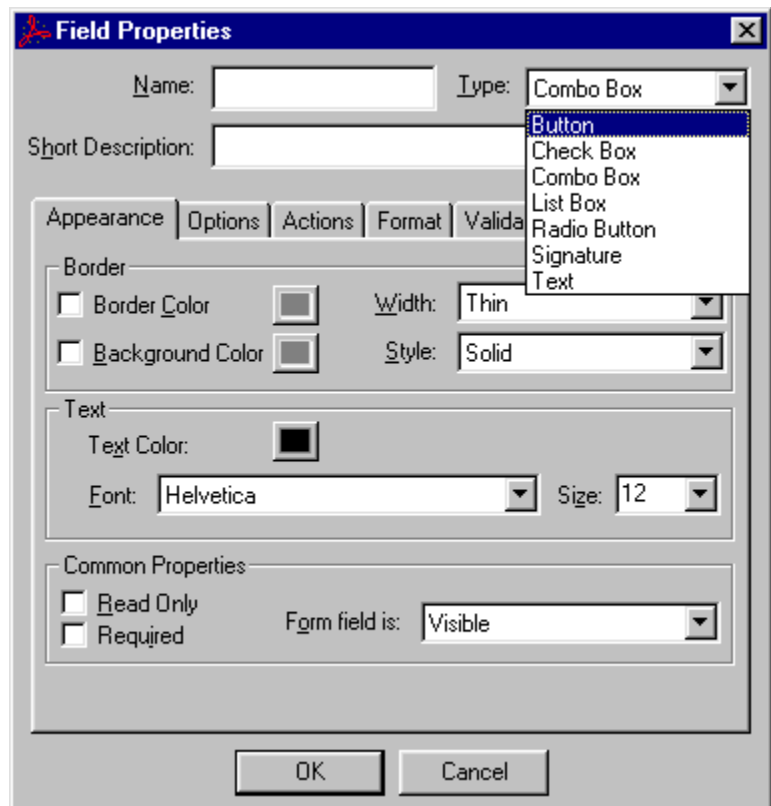
### Demo Mode

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

## Acrobat Form Fields

There are currently seven different types of form fields which can be created in Acrobat 4 or 5. These are described briefly below. Due to the nature of certain form field types, Variform PDF will only merge data into Combo Boxes, Text Boxes, List Boxes, Check Boxes or Radio Buttons. If other field types are used with Variform PDF 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, List Box or Radio Button the data file must include the export value for the field(s). The default export value for Check Boxes and Radio Buttons is “Yes”. For List Boxes the form creator must specify the list items and their export values. All export values are case sensitive. As an example, to get a check box to display as checked put “Yes” (or the appropriate export value) in the data 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.



### 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. Variform PDF supports all of these choices and the output from Variform PDF 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 Variform PDF’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 Variform PDF is “Visible but doesn’t print”. Although the data will be merged, for obvious reasons, it will not appear in the output from Variform PDF.

## 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 Variform PDF 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, Variform PDF will still print it, but the data will be truncated. Selecting the password option causes data for that field to be displayed as “\*\*\*\*\*” and Variform PDF will print it as such.

## 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 Variform PDF’s ability to merge and/or print.

## Format

Acrobat allows the user to select from predefined formats or create custom formats for the data to be entered into a field. Although Variform PDF 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, Variform PDF 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 Variform PDF’s [Preferences](#).

## Validate

When a field’s format is numeric, Acrobat allows for validation of the data entry. As with the Format option (above), Variform PDF 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, Variform PDF 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 Variform PDF.

## Calculate

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

## Setting Variform PDF Preferences

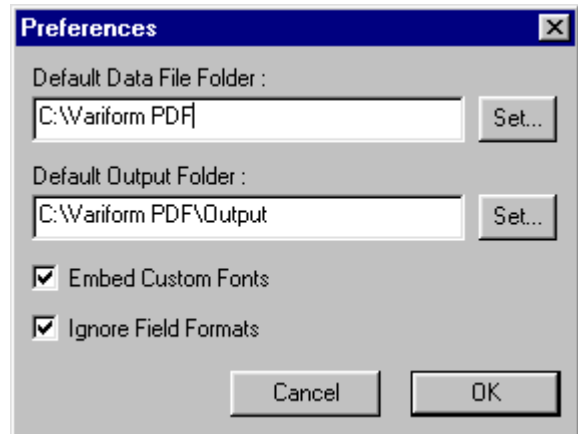
The preferences for Variform PDF can be set using the standard Acrobat method of File -> Preferences -> Variform PDF. After making changes in this window click “OK” to make them permanent. Clicking “Cancel” will return the preferences to the last values stored.

### Default Data File Folder:

This determines the default path where Variform PDF 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.

### Default Output Folder:

This determines the default path where Variform PDF will send PostScript files when “File” is selected in the “Print” window. The path may be entered manually, or by using the “Set...” button to browse to select a folder.




### 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. If Embed Custom Fonts is enabled in Variform PDF’s preferences, then when you select a custom font(s) in Variform PDF Setup and click “Save”, the PDF will be saved with the fonts embedded. If the preference is turned off then the fonts are only embedded in the output, not saved with the PDF.


### Ignore Field Formats

This function allows Variform PDF 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.

## Using Variform PDF

To use the software, select “Activate Variform PDF Setup” from the Acrobat “Tools” pulldown menu. Alternatively, you can launch Variform PDF Setup using the  button on the Acrobat toolbar. Variform PDF will then display its setup dialog. See the following sections for more details on setup, printing and using watched folders.

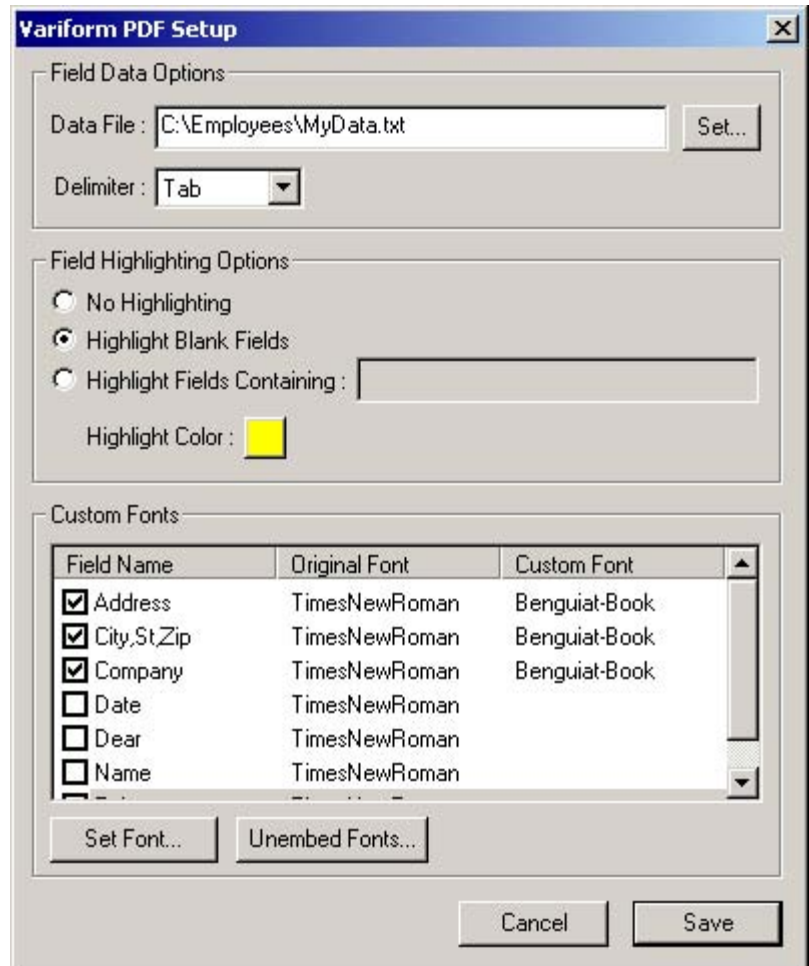
## The “Variform PDF Setup” Window

This window is the first step in preparing to merge data. With the PDF form open in Acrobat the user selects the data file, delimiter and customization options such as highlighting and custom fonts. This window can be opened by clicking the  icon on the Acrobat toolbar.

### Field Data Options

#### 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 Variform PDF. If the document is saved after printing, the source file name is stored in the PDF for future use.



✉ *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.*

#### 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 Variform PDF finds in the data file, a warning message will appear and printing will not be allowed until the correct choice is made.

### Field Highlighting Options

There are three options for highlighting fields in the output.

#### No Highlighting

This is the default. Variform PDF will not apply any highlighting when merging data.

#### Highlight Blank Fields

Will cause any field which does contain data from the data file to be highlighted in the output.

### Highlight Fields Containing:

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

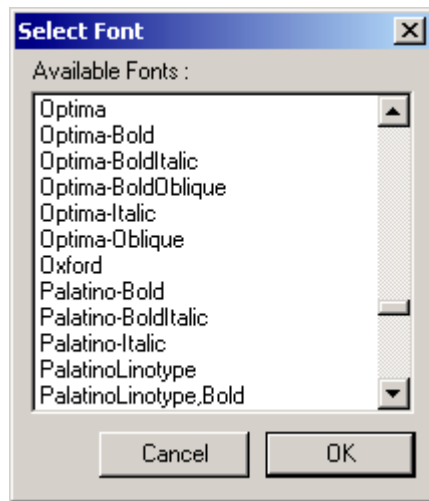
### Highlight Color:

Gives the user the ability to specify a color to be used for highlighting in the output.

### Custom Fonts

This list displays 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 Variform PDF. 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 them make the box(es) checked again.

### Selecting Fonts



When “Set Font...” is clicked 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 Fonts Dialog window without making a change, click “Cancel”.

*✉ Note: If custom fonts are selected the PDF will be saved when you click “Save” in the Variform PDF Setup dialog. When 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.*

### Unembed Fonts

Clicking this button will causes all fonts stored (embedded) in the PDF to be removed (unembedded) from the PDF. This includes both fonts in the original PDF as well as custom fonts embedded by Variform PDF.


### Cancel

Clicking this will restore the PDF to its state before any Variform PDF options were entered or changed.

### Save

By clicking the Save button all selections made in the Variform PDF Setup window will be stored in the PDF.

## The “Print” Window

This window allows the user to select all of the parameters necessary to merge an external file with the Acrobat form. This window can be opened by clicking the  icon on the Acrobat toolbar.

### Print Records:

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

### Page Range:

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.

### 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 Variform PDF 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. The initial default folder will either be the one specified in the Variform PDF Preferences, or the current folder, which is usually the same as the current PDF document’s folder.

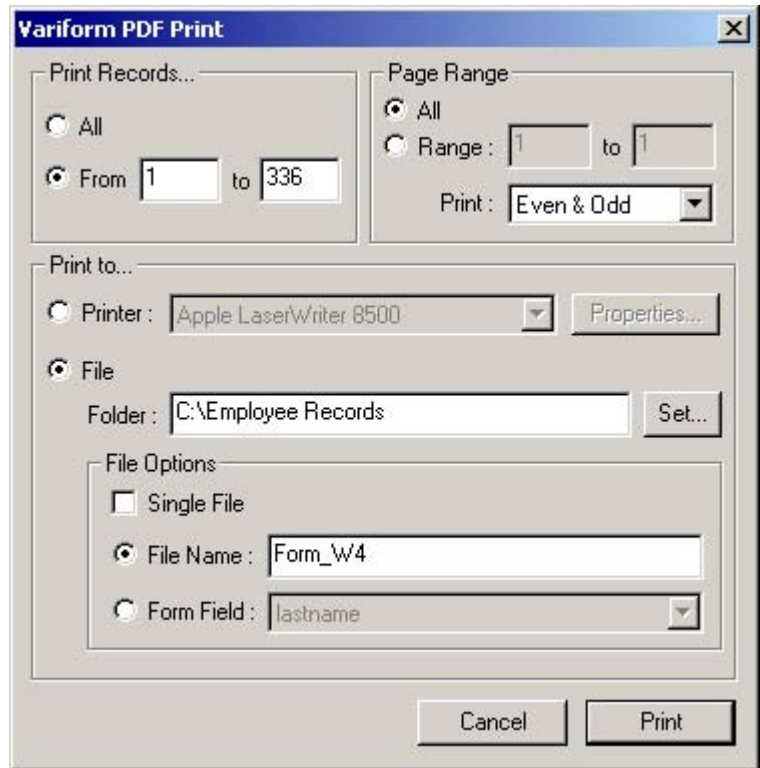
### Properties

This button launches the printer properties window where the user can select media size, orientation and other printer attributes that will affect the output.

### 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. The initial default file name will be the same as the name of the PDF document being used for this job. If “Single File” is not selected and the user elects to use a file name for the output each output file will have the same name with a number appended to it (i.e. Myfile1.ps, Myfile2.ps, and so on).



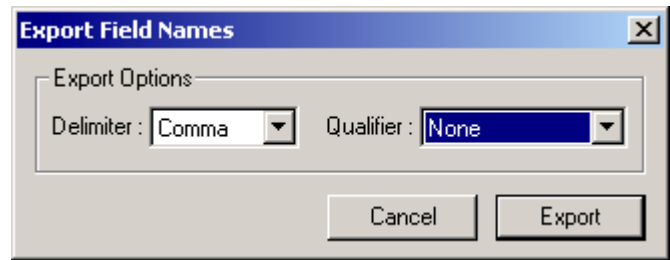
“Form Field” will become active only when “Single File” is OFF (unchecked). This allows the user to pick from a list of the form field names in the PDF. The data for that field will be used as the file name. For example if the user picks “Last Name” from the list of fields, each PostScript file will 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. If a field in the data file is empty then the output file will be named “Blank”.

☒ *Note: The output from Variform PDF 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. In Windows you can make a merged PDF by printing directly to the Acrobat Distiller printer or by printing to a PostScript file then using the Acrobat Distiller application. On the Macintosh, print to a PostScript file then use the Acrobat Distiller application.*

## The “Export Field Names” Window

The “Export Field Names” window can be accessed by selecting “Export Variform PDF 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, Variform PDF 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.

### 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 (’)”. If a field name contains the selected delimiter and no qualifier is chosen, Variform PDF will automatically use Double-quotes to ensure that the field is treated as a single field instead of two separate fields.

### Export

The “Export” button will launch a standard file save dialog. The path may be typed in manually, or the user can browse the hard disk to select folder. The default file name will be added to the path and will be the same as the PDF document name with “.txt” added as a suffix. The file name may be changed by typing in the field.

## PDF Variform Watched Folders

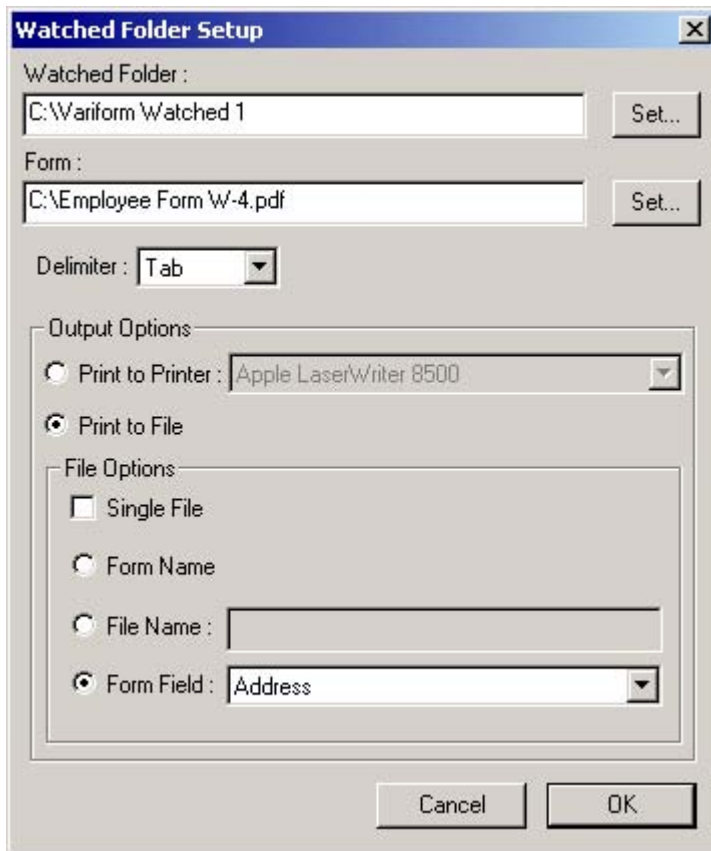
PDF Variform Watched Folders is a “hot folders” approach to automation. First you select an existing folder on your hard disk to act as a watched folder, next choose an Acrobat form to associate with the folder, then select a delimiter and your output options and you are ready. After everything is set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

PDF Variform Watched Folders is activated by clicking the  icon on the Acrobat toolbar. 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.



Variform PDF 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, Variform PDF 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 Variform PDF 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.

The File Options for watched folders are the same as those for the [Variform Print menu](#) except for Form Name. When Form Name is selected the output files will have same name as the PDF form.

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

- ☒ *PDF Variform 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 Variform PDF.*

### Support

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If you have support questions, email these to: [techsupport@artspdf.com](mailto:techsupport@artspdf.com)

If you believe that you are experiencing an undocumented software bug, please submit it to the email address above with all the information needed to reproduce the bug. This information should contain a description of the expected behavior versus the actual behavior, the applicable Variform PDF selections, and the **minimum** PDF file and data file that exhibits the behavior. If applicable, please include the resultant PostScript file or a description of the output configuration (RIP model, PostScript interpreter version number, and output device model). Without sufficient information, it will not be possible to determine if the bug actual exists in Variform PDF, whether it is configuration dependent, or if any potential workaround is possible.

### Notices

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