



# Content Express Help File

Suite Version: 3.000

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# Content Express Overview

Content Express is a full-featured content delivery and presentment system. Using Content Express, you can deliver any PC file via e-mail or post it to a web site.

If you have text reports, Content Express can deliver the report via E-Mail, Web, Fax, or print it to a printer. Reports can be delivered as text, HTML, or PDF attachments.

Form overlays can be merged with reports to create professional looking statements or invoices.

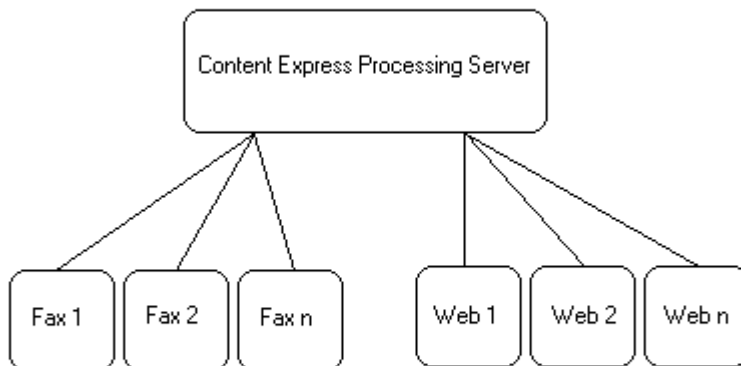
Using Content Express, you can assign users to reports creating a subscription list. Content Express can also burst a report into sections and deliver those sections to the appropriate end user. For example an invoice report can be burst into individual invoices and delivered to customers.

When bursting a report, Content Express can pull user account information from the report and automatically create accounts.

Content Express is fully scalable for mass faxing with support for multiple fax servers.

The web interface for Content Express can be installed on multiple remote web servers. New content can be added to those remote web servers via network file copy, or FTP upload.

## Content Express Scalability Diagram



Content Express can use 1 SQL server for all web interfaces, or a separate server for each interface.

# System Requirements

The system requirements for Content Express are as follows:

**Content Express Processing Machine:**

Windows 2000 server with 256MB RAM and 25GB of disk space is recommended at a minimum. For faxing, Windows 2003 is required with MS Fax installed.

**Content Express Standalone Fax Server:**

Windows 2003 Server with MS Fax installed.

Minimum requirements for Windows 2003 operating system.

Network access to the primary Content Express machine.

**Content Express Standalone Web Server:**

Windows 2000 server with IIS installed. 256 MB RAM and 25GB of disk space.

More disk space may be needed depending on your site's volume.

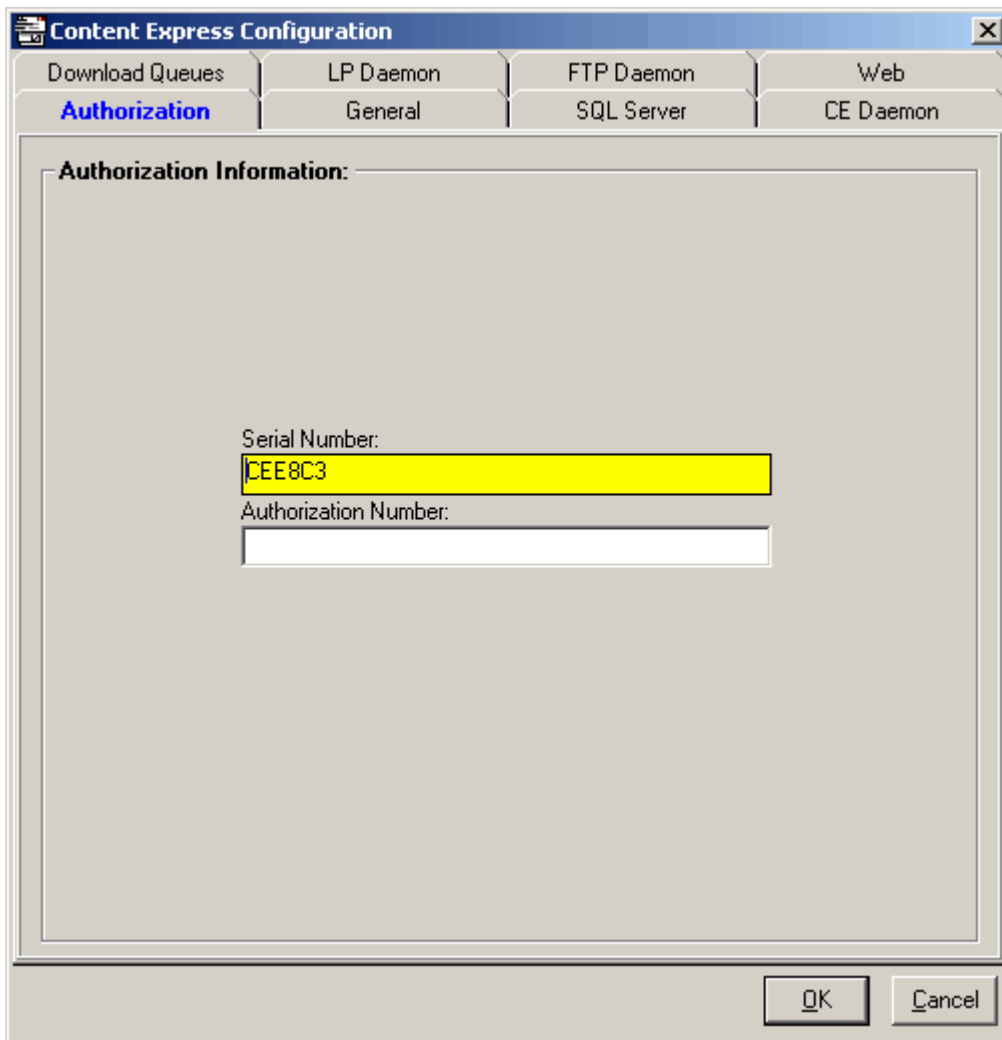
SQL Server 2000 or MSDE 2000.

# Installing and Configuring Content Express

After running the setup program, start Content Express.

The Content Express Configuration dialog will be displayed.

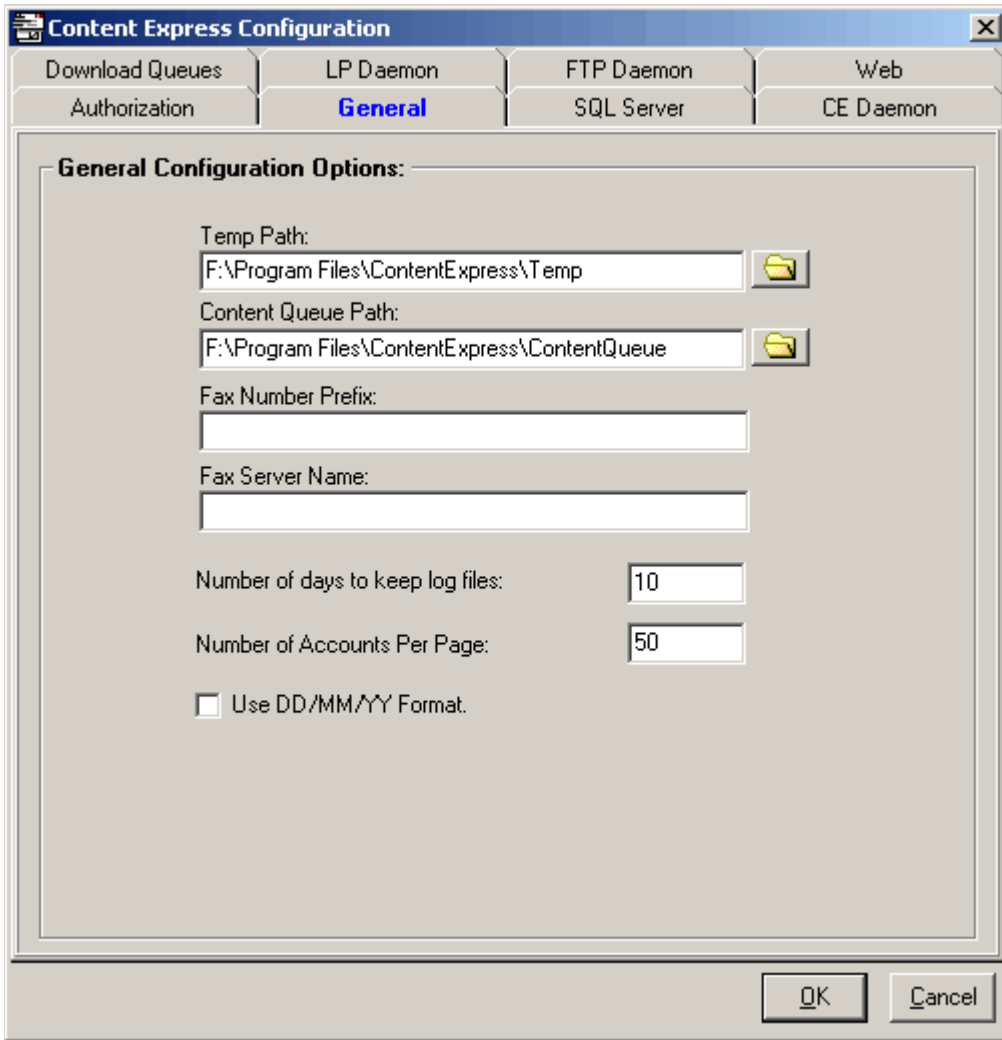
## Authorization



The image shows a screenshot of the 'Content Express Configuration' dialog box, specifically the 'Authorization' tab. The dialog has a title bar with the text 'Content Express Configuration' and a close button. Below the title bar are several tabs: 'Download Queues', 'LP Daemon', 'FTP Daemon', 'Web', 'General', 'SQL Server', 'CE Daemon', and 'Authorization'. The 'Authorization' tab is selected and highlighted in blue. The main area of the dialog is titled 'Authorization Information:' and contains two input fields. The first field is labeled 'Serial Number:' and contains the text 'CEE8C3'. The second field is labeled 'Authorization Number:' and is currently empty. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

Contact Electronic Storage Corporation for your Content Express Authorization Number and enter it on this screen.

## General Configuration Options



The screenshot shows the 'Content Express Configuration' dialog box with the 'General' tab selected. The dialog has a title bar with a close button. Below the title bar are several tabs: 'Download Queues', 'LP Daemon', 'FTP Daemon', 'Web', 'Authorization', 'General' (highlighted in blue), 'SQL Server', and 'CE Daemon'. The main area is titled 'General Configuration Options:' and contains the following fields:

- Temp Path: F:\Program Files\ContentExpress\Temp (with a folder icon button)
- Content Queue Path: F:\Program Files\ContentExpress\ContentQueue (with a folder icon button)
- Fax Number Prefix: (empty text box)
- Fax Server Name: (empty text box)
- Number of days to keep log files: 10 (spin box)
- Number of Accounts Per Page: 50 (spin box)
- Use DD/MM/YY Format.

At the bottom right are 'OK' and 'Cancel' buttons.

In most cases you can use the default temp path and content queue. The temp path is used for temporary files while Content Express is processing files and reports.

The content queue is where files and reports are queued up for delivery.

In the fax number prefix field, you can enter any dialing information needed to dial out from your phone system. For example: 9,

The Fax Server Name allows you to define the name for the local fax server. The local fax server is the one running on the same machine as Content Express if any.

Number of Accounts Per Page will determine how many accounts are displayed at one time on the screen.

## SQL Server Configuration

The screenshot shows a window titled "Content Express Configuration" with a close button (X) in the top right corner. The window has a tabbed interface with the following tabs: "Download Queues", "LP Daemon", "FTP Daemon", "Web", "Authorization", "General", "SQL Server" (which is selected and highlighted in blue), and "CE Daemon". The "SQL Server" tab is active, displaying the "SQL Server Configuration" section. This section contains the following fields and controls:

- "SQL Server Name:" followed by a text input field.
- "SQL User Name:" followed by a text input field.
- "SQL Password:" followed by a text input field.
- An unchecked checkbox labeled "Use NT Authentication".
- "Data Path on Database server:" followed by a text input field and a folder icon button.
- A "Test" button located below the data path field.
- A "Create Database..." button located below the "Test" button.

At the bottom of the dialog box, there are "OK" and "Cancel" buttons.

The SQL Server settings are defined on this tab.

Enter the SQL Server name, user name, password, windows authentication option, and data path for the database file.

Note: The data path is relative to the machine on which SQL Server is running. Be sure to create that directory on the SQL Server machine.

After configuring the SQL Server connection, click the Test button to check your settings then click the Create Database button.

This will create the Content Express database.

# Configuring the Content Express Processing Daemon

On the Configuration Options screen, click the CE Daemon tab.

The screenshot shows the 'Content Express Configuration' dialog box with the 'CE Daemon' tab selected. The dialog is divided into several sections: 'SMTP Settings', 'POP3 Settings', and 'Purge Options'. The 'SMTP Settings' section includes fields for 'SMTP Server Name' (mail.domain.com), 'SMTP Server Port' (25), and 'SMTP Reply Address' (reply@domain.com). The 'POP3 Settings' section includes a checkbox for 'Check POP3 server for Read Receipts?' (unchecked), 'POP3 Server' (mail.domain.com), 'POP3 Port' (110), 'POP3 User Name' (popuser), and 'POP3 Password' (poppass). The 'Purge Options' section includes two dropdown menus for 'Purge Completed Jobs Older Than' and 'Purge Incomplete Jobs Older Than', both set to '0' hours. A note below the dropdowns states '0 = don't purge.' The dialog has 'OK' and 'Cancel' buttons at the bottom right.

## SMTP Settings:

Enter the DNS or IP for your SMTP server, the SMTP server port (normally 25), and the e-mail reply address. You may enter the e-mail reply address as [user@domain.com](mailto:user@domain.com) or [description] <[user@domain.com](mailto:user@domain.com)>

For example: ABC Corp Document Delivery <[docdelivery@abccorp.com](mailto:docdelivery@abccorp.com)>

## POP 3 Settings:

The pop 3 settings allow you to configure Content Express to check a pop account for return receipts. This can be used to verify that an end user received the content e-mailed to them.

Enter the pop 3 mail server, pop port (normally 110), and the pop 3 user and password.

## Purge Options:

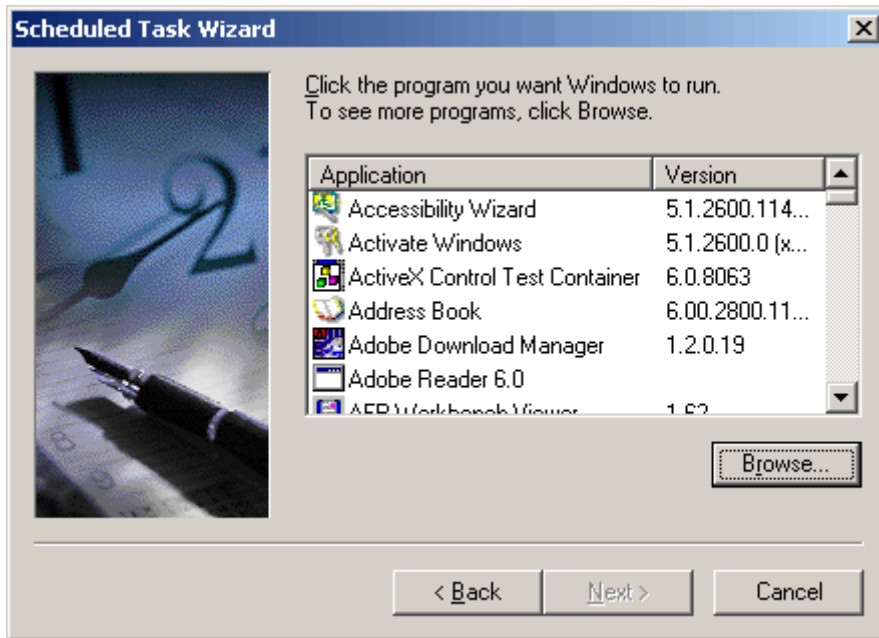
When content is processed through Content Express, the resulting files are placed in the content queue for delivery.

The files stay in the content queue indefinitely unless you opt to purge the files.

It's recommended that you purge your content files to keep from running out of disk space. Enter the # of hours, days, or months that you wish to keep the content. Entering 0 will cause Content Express to keep the content indefinitely.

The final step in configuring the Content Express Daemon is to create a scheduled task to run the Content Express Daemon.

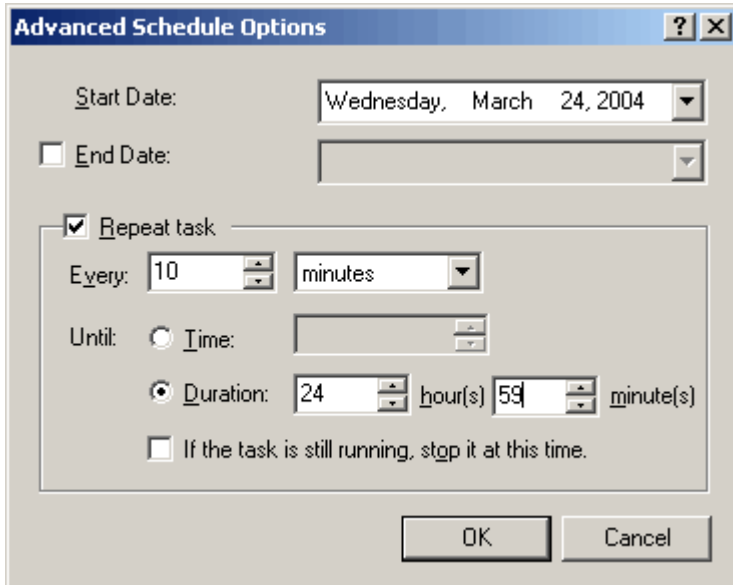
In the windows control panel, select Scheduled Tasks and create a new task.



Click the Browse button and find ContentExpressD.Exe

Set the schedule according to your processing and delivery needs.

Using the Advanced settings, you can run the Content Express Daemon as often as once per minute.



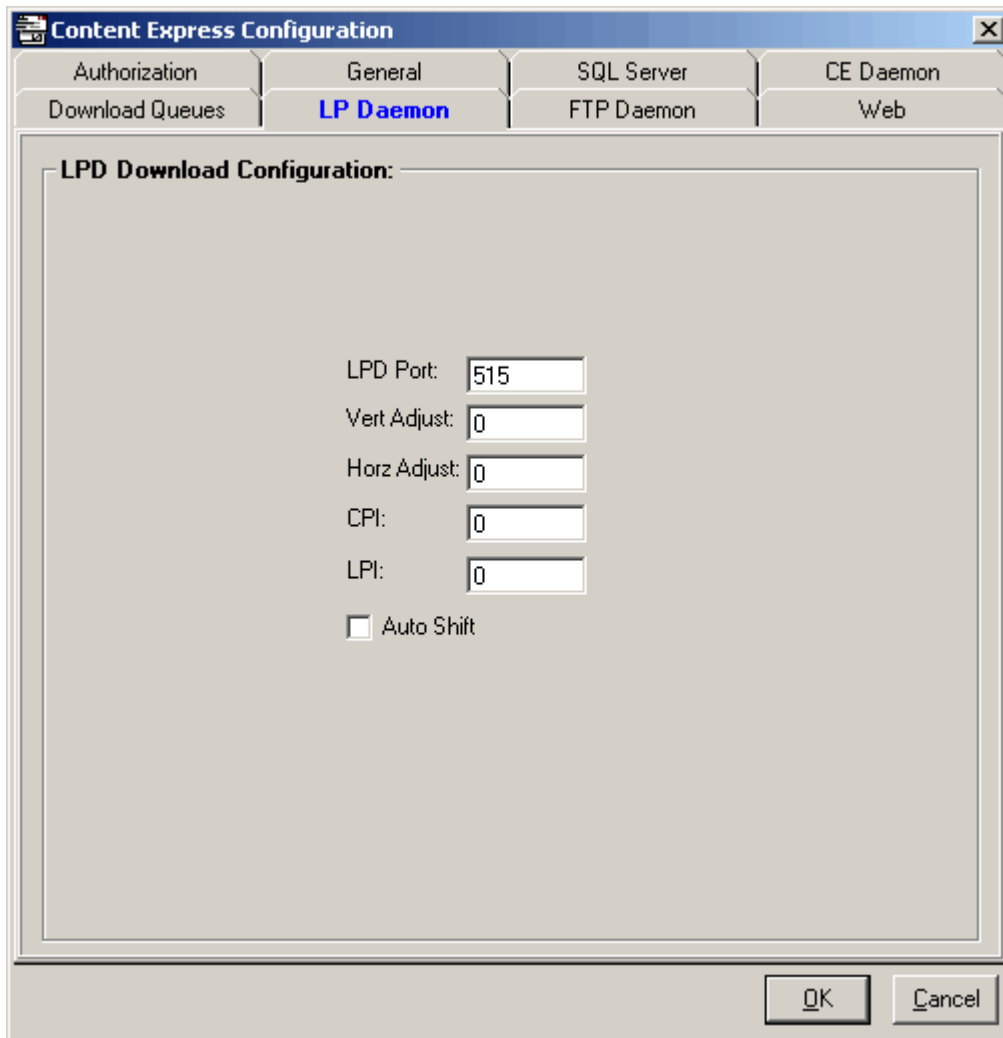
The image shows a dialog box titled "Advanced Schedule Options" with a standard Windows window border (title bar, help icon, close icon). The dialog contains the following fields and controls:

- Start Date:** A text box containing "Wednesday, March 24, 2004" with a dropdown arrow on the right.
- End Date:** A checkbox labeled "End Date:" followed by an empty text box with a dropdown arrow.
- Repeat task:** A checked checkbox labeled "Repeat task" followed by a large rectangular area containing:
  - Every:** A text box with "10" and a dropdown arrow, followed by a dropdown menu showing "minutes".
  - Until:** A radio button labeled "Time:" followed by an empty text box with a dropdown arrow.
  - Duration:** A radio button (selected) labeled "Duration:" followed by a text box with "24", a dropdown arrow, the text "hour(s)", a text box with "59", a dropdown arrow, and the text "minute(s)".
  - Check box:** An unchecked checkbox labeled "If the task is still running, stop it at this time."
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

# Configuring the Content Express LP Daemon

If you are going to be downloading reports from your AS/400 or Mainframe system you can use the Content Express Line Printer Daemon (LPD) to accept reports.

In the Content Express Configuration, click the LP Daemon tab.



The image shows a screenshot of the 'Content Express Configuration' dialog box. The 'LP Daemon' tab is selected. The 'LPD Download Configuration' section contains the following fields and options:

- LPD Port: 515
- Vert Adjust: 0
- Horz Adjust: 0
- CPI: 0
- LPI: 0
- Auto Shift

At the bottom right, there are 'OK' and 'Cancel' buttons.

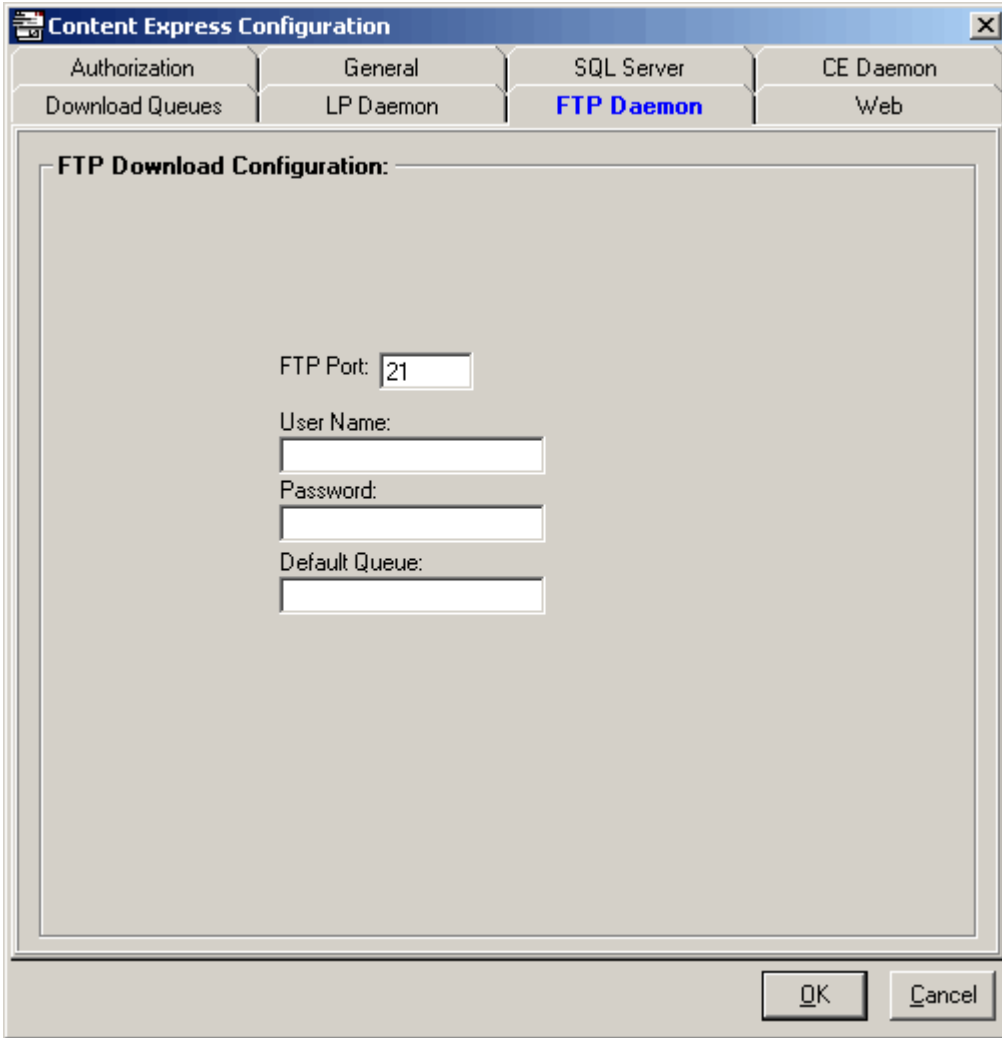
Enter the Port for the LP Daemon to listen on. The default is 515.

If you are downloading PCL data technical support will help you configure the Vert Adjust, Horz Adjust, CPI, LPI, and AutoShift if needed.

The next step is to define a download queue. See the topic Defining Download Queues.

# Configuring the Content Express FTP Daemon

On the Content Express Configuration screen, click the FTP Daemon tab.



The image shows a screenshot of the 'Content Express Configuration' dialog box. The 'FTP Daemon' tab is selected and highlighted in blue. The dialog box contains the following fields:

- FTP Port:** A text box containing the number '21'.
- User Name:** An empty text box.
- Password:** An empty text box.
- Default Queue:** An empty text box.

At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

Enter the Port for the FTP Daemon to listen on. (21 is the default)

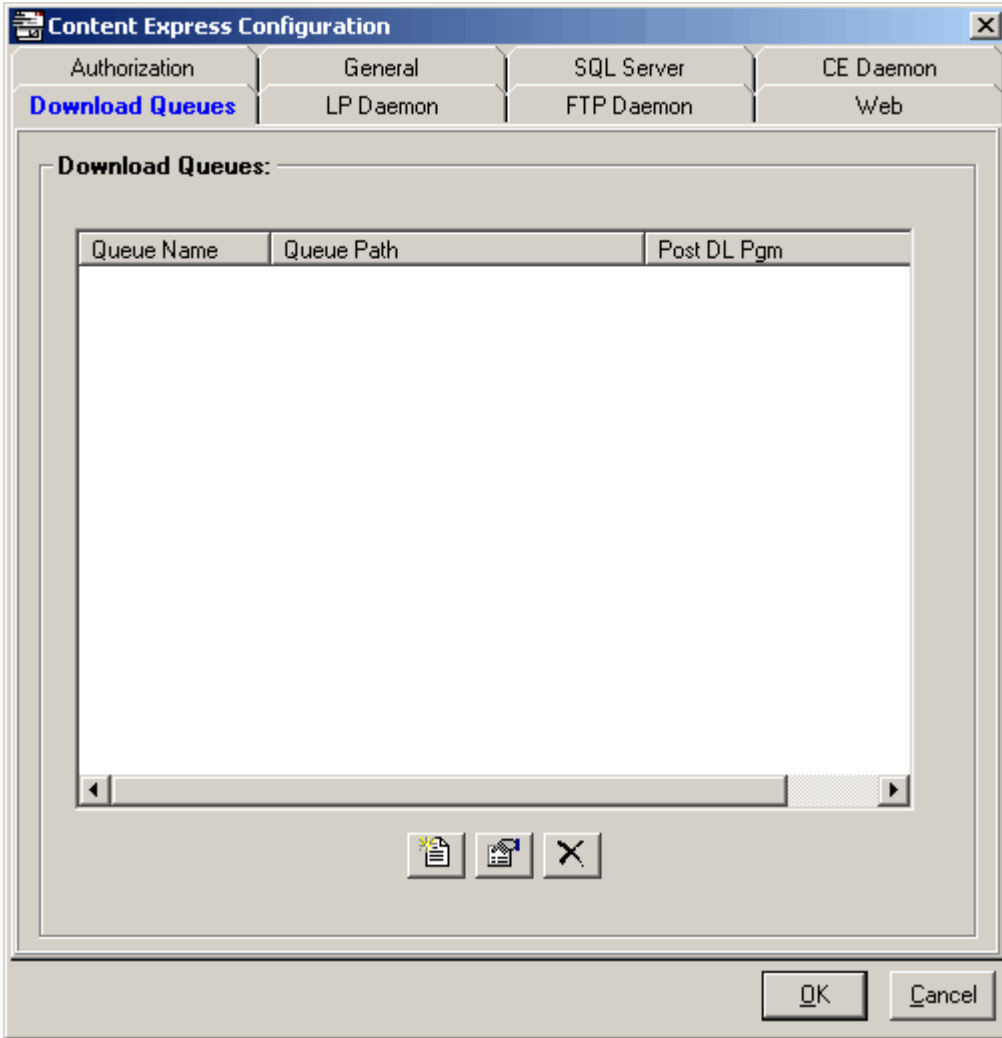
Enter a user name and password to log into the FTP Daemon with.

Also enter the name of the default queue. This will be the current queue after you login with FTP.

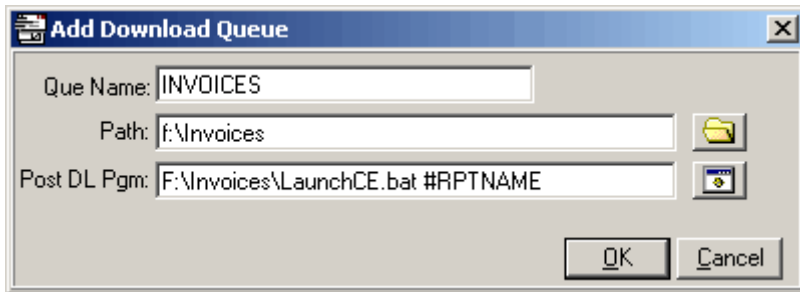
The final step is to define a download queue.

# Defining Download Queues

On the Content Express Configuration screen, click the Download Queues tab.



Click the Add Queue button.



Enter the name of the Queue, the path for the downloaded data, and optionally a post download program.

The post download program will run after each file that's downloaded to the CE LPD or FTP server.

You can enter replaceable parameters to be passed to the post download program.

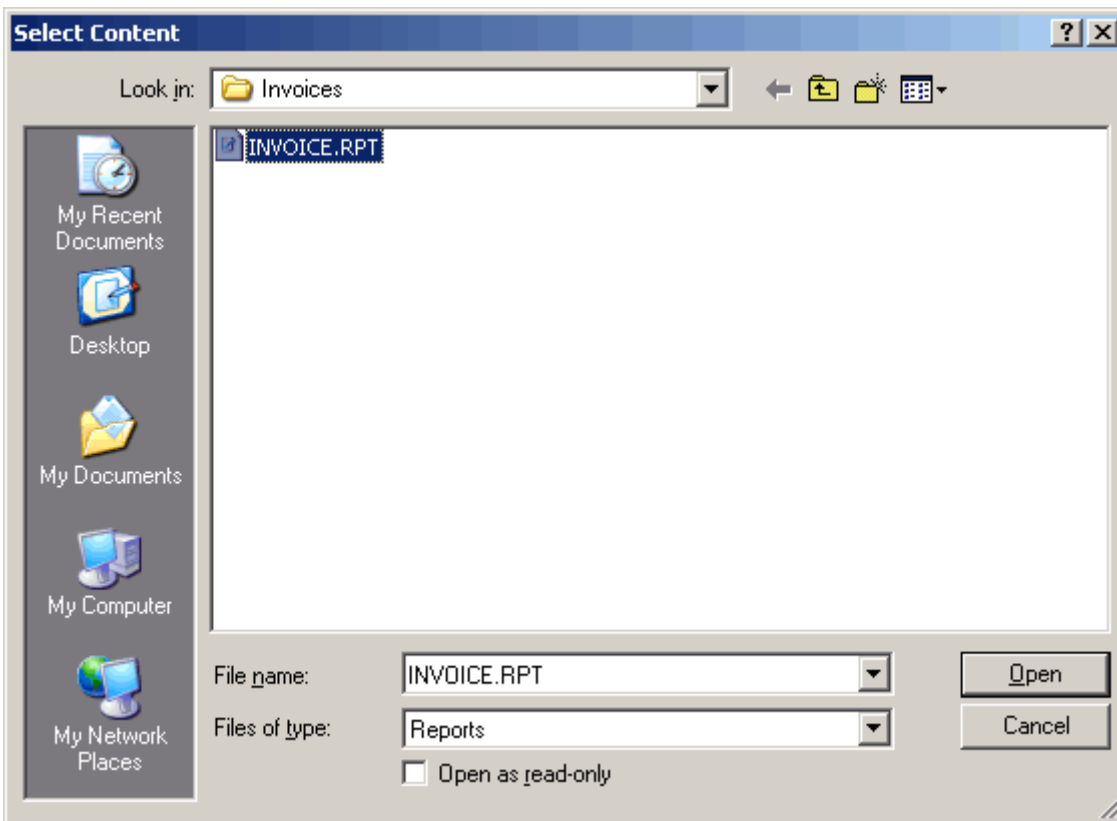
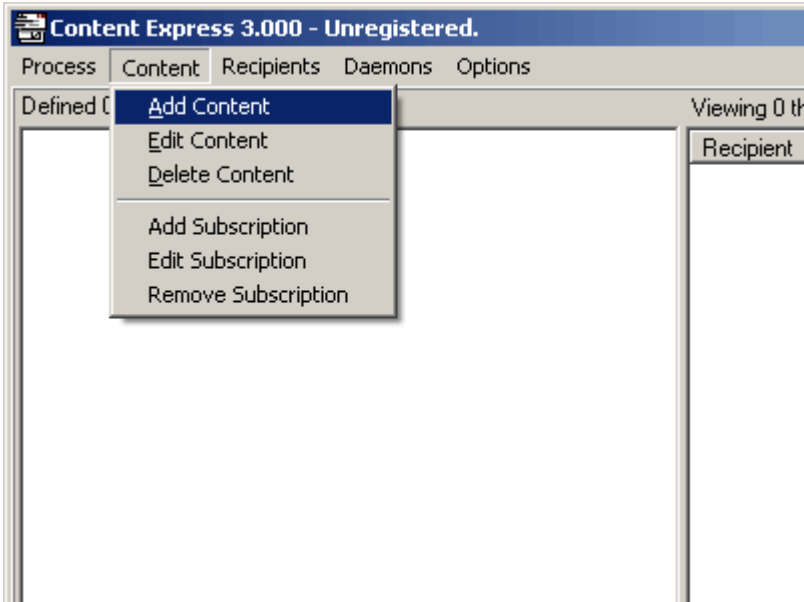
#RPTNAME will pass the file name with no extension.

#FILEPATH will pass the path to the file.

Using the post download program, you can launch Content Express and have it process the file immediately after download.

# Adding Content to Content Express

To add a file or report to Content Express, click the Content Menu and select Add Content.



Browse for the file you wish to add then click Open.

After adding the file, Content Express will bring up the Content Properties screen.

# Working with Content Properties

To work with content properties, Right click the file you wish to work with and select "Edit Content". Or select "Edit Content" from the Content Menu.

## Summary Tab

The screenshot shows a window titled "Content Properties" with a "Summary" tab selected. The window contains a "Current Settings:" section with two sub-sections: "Processing Options" and "E-Mail Options".

| Processing Options     |                         |
|------------------------|-------------------------|
| Content Type:          | Report                  |
| Content Name:          | f:\invoices\invoice.rpt |
| Content Description:   | Monthly Invoice         |
| Content Delivery Name: | invoice.rpt             |
| Split Option:          | None                    |

| E-Mail Options          |  |
|-------------------------|--|
| E-Mail Reply Address:   | None - Will use system default.                      |
| E-Mail Subject:         | None - Default Content Express Subject will be used. |
| E-Mail Message:         | None   |
| Request Return Receipt: | No   |

An "OK" button is located at the bottom right of the dialog.

This screen gives you a quick summary of the configuration settings for this particular file.

## Processing Tab

The screenshot shows the 'Content Properties' dialog box with the 'Processing' tab selected. The 'Content Settings' section contains the following fields and options:

- Content ID: 1
- Content File Name: f:\invoices\invoice.rpt (with a file icon to the right)
- Content Description: Monthly Invoice
- Delivery File Name: invoice.rpt
- Process Type:
  - Send the entire file.
  - Split the report and create user accounts based on data within the report.
  - Split the report and assign pages to pre-existing accounts.

An 'OK' button is located at the bottom right of the dialog box.

On the processing tab, the content file name is defined. This can be changed by clicking the icon to the right of the file name and path.

When Content Express processes this file, it will look for the file to exist exactly as named.

The Content Description is used when sending the file via e-mail or posting it to the web.

The delivery file name is the file name used when sending the content via e-mail or posting it to the web. This field allows you to change the file name and extension for the delivered content.

Process Type:

There are 3 types of processing that Content Express can perform.

Send Entire File:

This is used to send an entire report or for non-report files (XLS, DOC, etc). The file is sent in its entirety to the accounts that are subscribed to it.

Split and Create:

This option is used for reports. It will split a report based on criteria within the report. It will automatically create accounts from data taken from within the report. For example, you could split an invoice file by customer number and Content Express will create an account for each customer number.

Split And Assign:

This option is used for reports. It will split a report based on criteria within the report and assign the report segment to a pre-defined user account. This option can be used to pull just certain sections of a report and send them to a recipient.

## E-Mail Tab

The image shows a screenshot of the 'Content Properties' dialog box, specifically the 'E-Mail' tab. The dialog has a title bar with a close button (X) and a menu icon. Below the title bar is a navigation bar with several tabs: 'Split & Create', 'JMEV', 'CE Fields', 'Faxing', 'Attach Pages', and 'Web'. Underneath these are sub-tabs: 'Summary', 'Processing', 'Email' (which is selected and highlighted in blue), 'Print/PDF', 'Overlay', and 'Merge Accts'. The main area is titled 'Email Options:' and contains a 'Content Message Options:' section. This section includes three input fields: 'E-Mail Reply Address', 'Subject', and 'Message'. The 'Message' field is a large text area with a vertical scrollbar. To the right of the 'Message' field is a checkbox labeled 'Request return receipt'. At the bottom right of the dialog is an 'OK' button.

These settings apply to content delivered via e-mail.

On this screen, you can configure an e-mail reply address for this file. If none is entered, Content Express will use the e-mail reply address entered in the Content Express Configuration screen.

You can also enter a custom subject and e-mail message.

Checking the Request return receipt option will cause Content Express to enter headers into the e-mail message that request the recipient to confirm they received the e-mail.

Note: Not all e-mail readers support return receipt and some e-mail readers can have the option disabled.

## Print/PDF Tab

The screenshot shows the 'Content Properties' dialog box with the 'Print/PDF' tab selected. The dialog is divided into several sections for configuration:

- Printer:** HP LaserJet 4000 Series PCL 6
- PaperSize:** Letter, 8 1/2 x 11
- Paper Bin:** Lower
- Font Name:** Courier New
- Font Size:** 10
- Page Margins:** Left: 0.25, Right: 0.25, Top: 0.25, Bottom: 0.25
- Orientation:** Portrait (selected), Landscape
- Duplex Option:** Simplex
- Line Spacing:** 1
- Zoom:** 25%

On the right side of the dialog, there is a preview window showing a sample of the report's output, which appears to be a text-based report with various fields and data points.

On this screen, you can configure how the report will look when printed or delivered via web or e-mail as a PDF file.

Content Express will use these settings when processing this file and creating PDF files or print jobs.

## Overlay Tab

**Content Properties**

Split & Create | JMEV | CE Fields | Faxing | Attach Pages | Web  
Summary | Processing | Email | Print/PDF | **Overlay** | Merge Accts

**Form Overlay Options:**

No Overlay  
 Use Criteria to specify overlays  
 Specify overlays based on page number

Path to Overlay Directory:  
F:\Invoices

Add Entry:

Available Overlays:  
INVOICE.OVL

Selected Overlays:

| Page | Overlay |
|------|---------|
|------|---------|

Add Entry >> Remove OK

For reports, you can select one or more overlays to apply.

Overlays can be applied to reports based on criteria or page number.

To define an overlay, see the documentation for the LaserVault Overlay Generator.

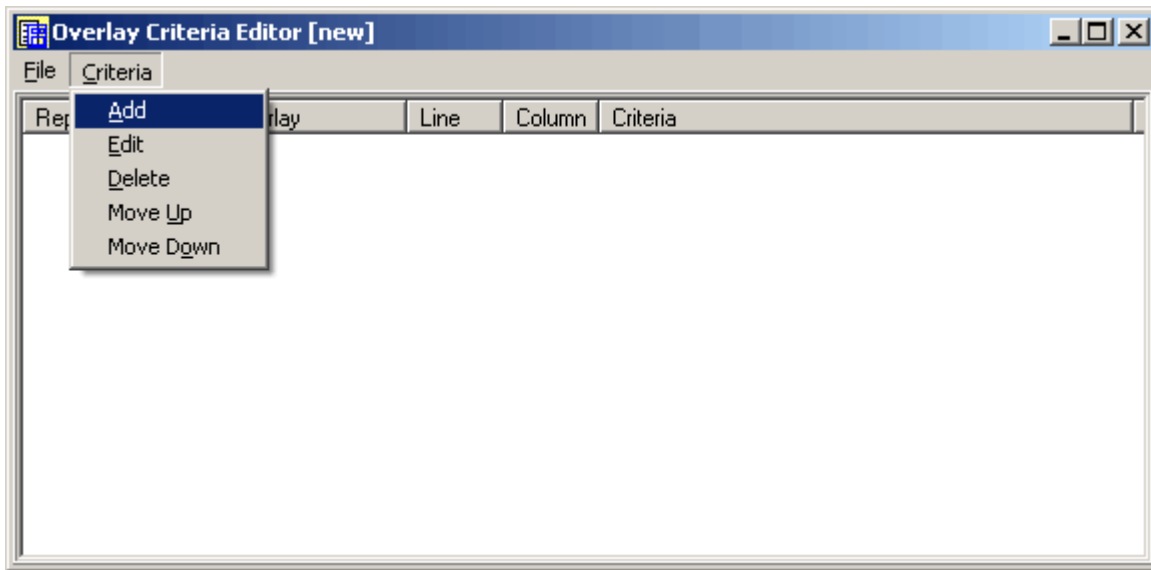
### Selecting Overlays Based on Criteria

When Content Express looks for an overlay in the overlay path, it first checks for a file called criteria.xml.

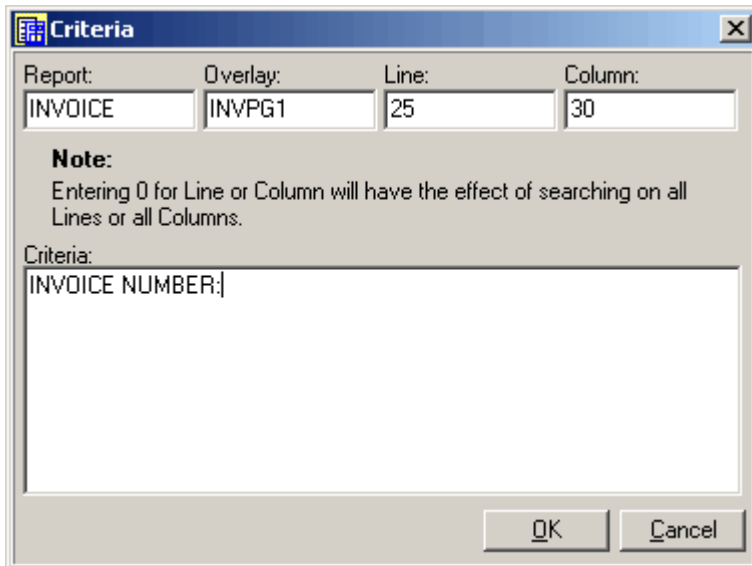
If that file is not found, then it looks for an overlay with the same file name as the report. For example if the report is named invoice.rpt, Content Express will look for invoice.ovl.

If no criteria is defined and an overlay is found with the same name as the report, then the overlay will be applied to every page of the report.

To define a criteria.xml file, use the file “OVLCritEdit.exe” in the utils directory where Content Express is installed.



In the criteria menu, click add to add a new criteria entry.



Enter the report name, the overlay file name, the line, column, and criteria value.

| Report  | Overlay | Line | Column | Criteria        |
|---------|---------|------|--------|-----------------|
| INVOICE | INVPG1  | 25   | 30     | INVOICE NUMBER: |
| INVOICE | INVPG2  | 45   | 75     | INVOICE TOTAL:  |

When done, select File/Save from the menu and save the criteria.xml file in the overlay path. In the above example, the overlay INVPG1 will be applied to any page where line 25, column 30 contains the text "INVOICE NUMBER:". The INVPG2 overlay will be applied to any page where line 45, column 75 contains "INVOICE TOTAL:".

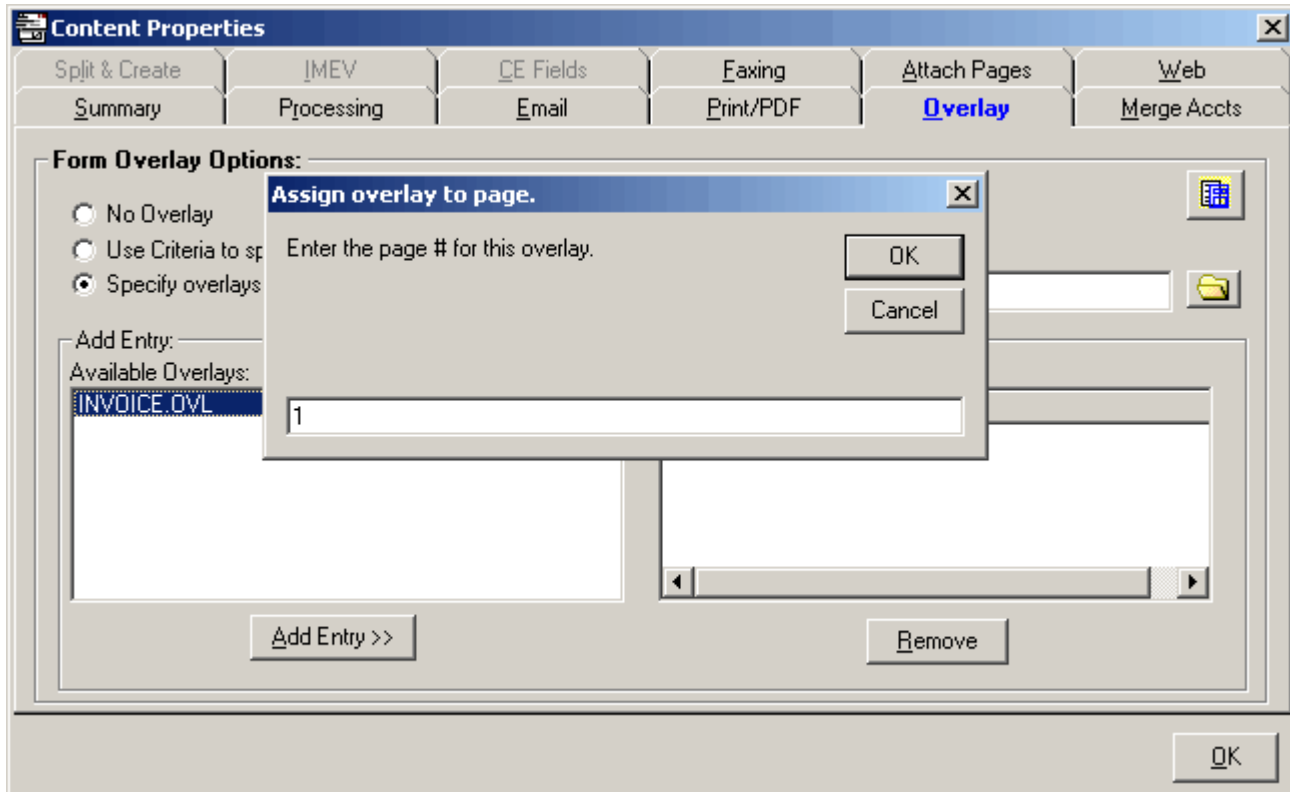
## Selecting Overlay Based on Page Number

Optionally, you can select overlays based on page number.

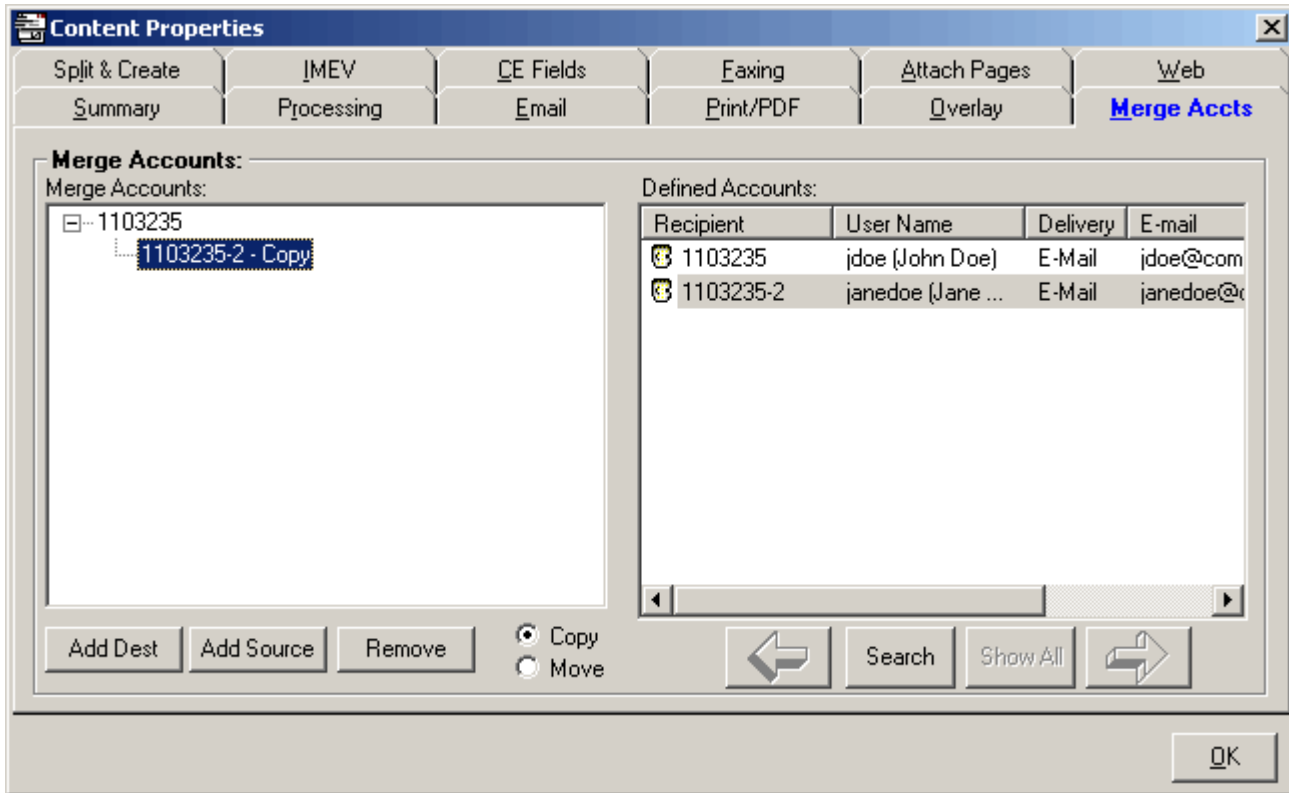
To use page based overlay selection, click the “Specify overlays based on page number” option.

Select an overlay file in the Available Overlays list and click the add entry button then enter the page number.

Content Express applies the overlays in a round robin fashion. For example, if you specify an overlay and enter page 1 the overlay will be applied on every page. If you were to specify an overlay for page 3 only the overlay would be applied to every third page.



## Merge Accounts Tab



The merge accounts functionality only applies to Split and Create processing.

This screen can be used to combine information from several source accounts into a single destination account.

For example, this could be used to send reports to each branch of a company, and also combine the report from each branch into a single file and send the report to a district manager.

To merge accounts, first select the destination account from the list on the right, then click the Add Dest button, next select one or more source accounts from the list on the left, check the move or copy option, then click "Add Source".

To remove a source or destination account from the tree, select the item to remove and click the Remove button.

## Split & Create Tab

The screenshot shows the 'Content Properties' dialog box with the 'Split & Create' tab selected. The dialog has a title bar with a close button (X) and a menu icon. Below the title bar are several tabs: Summary, Processing, Email, Print/PDF, Overlay, Merge Accts, Split & Create (selected), IMEV, CE Fields, Faxing, Attach Pages, and Web. The 'Split and Create Options' section contains two sub-sections: 'Delivery Options' and 'Attachment Options'. 'Delivery Options' has four checkboxes: 'Send the report via E-mail.' (checked), 'Post the report to the Web.' (unchecked), 'Print and mail the report.' (unchecked), and 'Fax the report.' (unchecked). 'Attachment Options' has three checkboxes: 'Create the report in native format.' (unchecked), 'Create the report in PDF format.' (checked), and 'Create report in HTML format.' (unchecked). Below these are three text input fields: 'Default Search Days for web interface:' with '10', 'Prepend To Each RecipientID:' with 'ACCT', and 'Default Password:' with 'password'. At the bottom are two radio buttons: 'Place pages that don't match the criteria in the nomatch table.' (unchecked) and 'Append pages that don't match to the previous matching page.' (checked). An 'OK' button is in the bottom right corner.

The options on this tab only apply to split and create processing.

### Delivery Options:

This section defines the default delivery options. When a new account is created the default delivery options selected here will be applied to the account.

### Attachment Options:

This section defines the default attachment type for e-mail or web. When a new account is created the default attach options selected here will be applied to the account.

You can specify the default search days for the web when a new account is created. This determines how many days worth of data will be displayed when a user logs into the web interface. The web interface can be configured to allow a user to change their own default search days setting. This is the default applied to new accounts.

Content Express has the ability to pull a password from the report. If no password is found, then the default password defined on this screen is used.

To help avoid recipient ID conflicts you can use a recipient prefix value for any recipients created from the report.

There are 2 ways Content Express can handle pages of a report where the split criteria is not found. It can output the page to a "no-match" file. After processing you can view the no-match file and see any pages that didn't match the split criteria.

You can also have Content Express append non-matching pages to the previous report segment.

## IMEV (Image Everywhere) Tab

The screenshot shows the 'Content Properties' dialog box with the 'IMEV' tab selected. The 'IMEV Options' section includes a checkbox for 'Post files to IMEV?'. The 'IMEV Server Info' section has fields for 'IMEV Server & Port', 'IMEV Username', 'IMEV Password', and 'IMEV Folder'. The 'IMEV Field Info' section contains a table for 'Lookup/Update Fields' and a sub-dialog box for adding a field. The sub-dialog box shows 'IMEV Field: CustomerNumber' and 'Field Value: #CUSTNUM#' with the 'Update' radio button selected.

On this tab we can define options for posting data from Content Express to the LaserVault Image Everywhere server.

The option to post to Image Everywhere only applies to Split and Create processing at this time.

Enter the Image Everywhere server name and port, user name and password, and the name of the imaging folder to post content to.

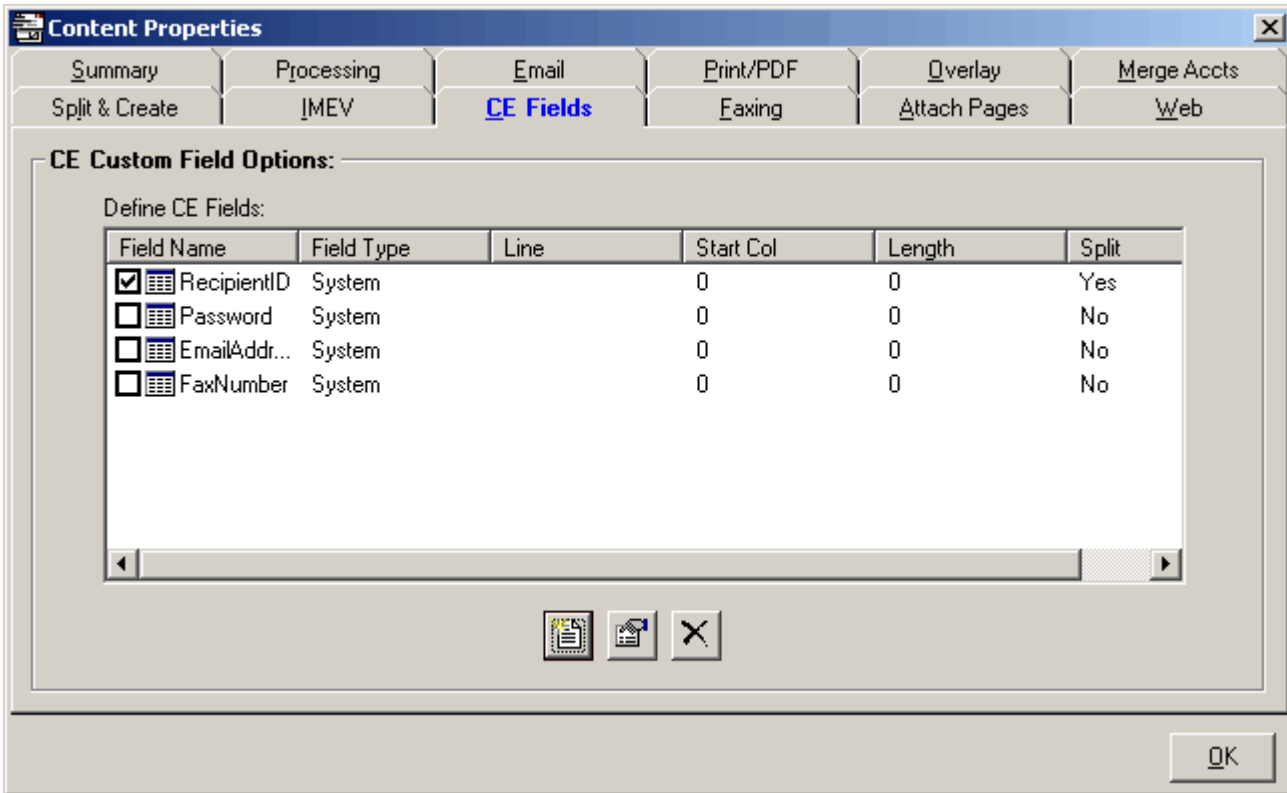
You can pull values from the report and update the imaging record with those values. You can also use values from the report to find a pre-existing imaging record.

To add an IMEV update or lookup field, click the add button and enter the name of the image everywhere field. For the field value, either enter a literal value, or use #[CE Field name]# to search or update using a value pulled from the report. The next section covers how to define a field in Content Express.

Select either update or lookup and click OK.

When the report is processed, a PDF will be created for each report segment. The PDF will be uploaded to the image everywhere server and a new record will be added or an existing record will be updated based on the lookup field values.

## CE Fields Tab



The CE Fields tab is where you can define one or more fields on the report. There are 4 system default fields.

**Recipient ID:** This is the unique identifier for the recipient such as customer number. This field must always be defined.

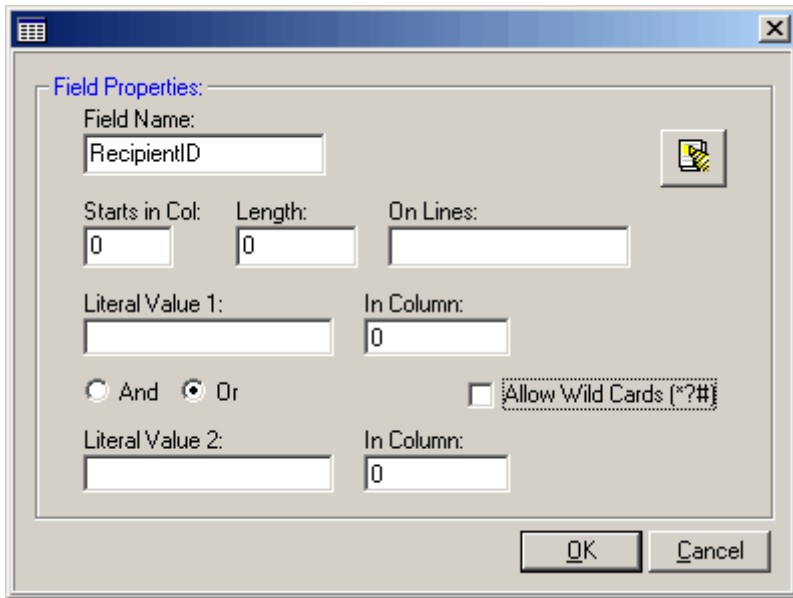
**Password:** This can be used to pull the password for a new account from the report.

**EmailAddress:** This can be used to pull the e-mail address from the report.

**FaxNumber:** This can be used to pull the fax number from the report.

You can also define your own fields to pull additional values from the report.

To add a user-defined field, click the Add Field button. To modify an existing field (including system fields) click the Edit Field button.



**Field Properties:**

Field Name: RecipientID

Starts in Col: 0 Length: 0 On Lines:

Literal Value 1: In Column: 0

And  Or  Allow Wild Cards (\*?#)

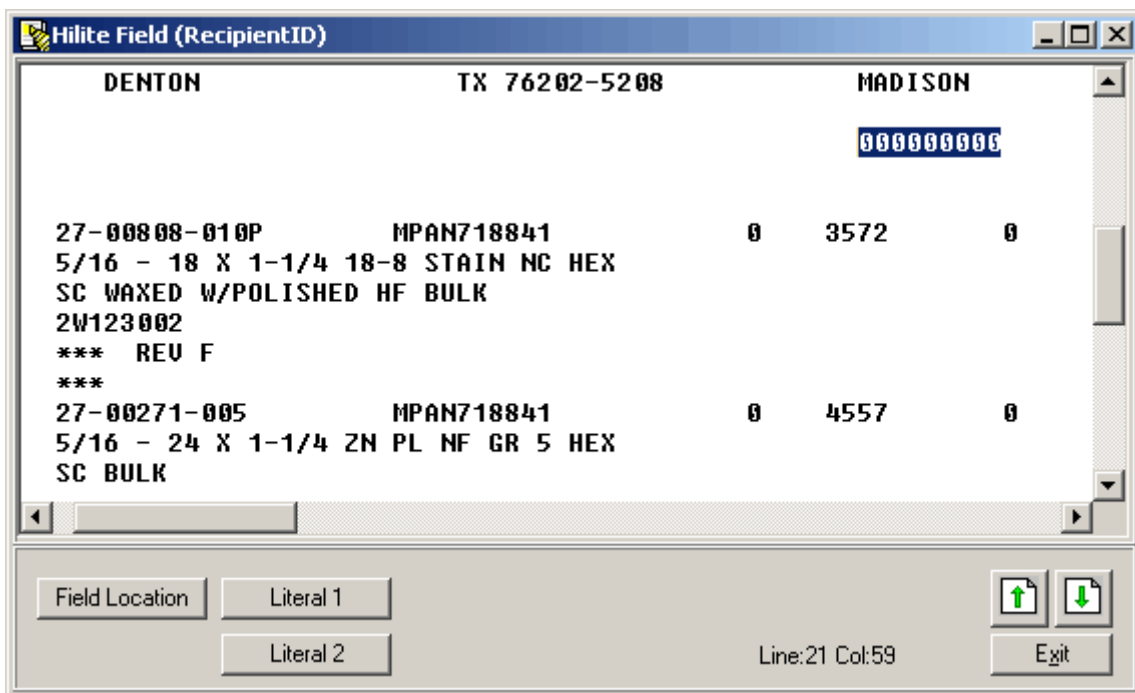
Literal Value 2: In Column: 0

OK Cancel

Enter the name of the field, the starting column, the length, and lines on which to look. To specify more than 1 line, use commas or dashes. For example "1, 3-5" will cause Content Express to search on lines 1, and 3 through 5.

You can also use literal values to help narrow the selection.

Click the hi-light button to see the report page and select criteria or the field position.



**Hilite Field (RecipientID)**

DENTON TX 76202-5208 MADISON

0000000000

27-00808-010P MPAN718841 0 3572 0

5/16 - 18 X 1-1/4 18-8 STAIN NC HEX

SC WAXED W/POLISHED HF BULK

2W123002

\*\*\* REV F

\*\*\*

27-00271-005 MPAN718841 0 4557 0

5/16 - 24 X 1-1/4 ZN PL NF GR 5 HEX

SC BULK

Field Location Literal 1 Literal 2

Line:21 Col:59

Exit

If you click the field location button, the line, column and length field will be filled in based on the hi-lighted value.

If you click the literal 1 or literal 2 buttons, the literal value fields will be filled in.

After defining the field from the report, you can select which fields to split on.

In most cases you will only split on RecipientID. In some cases you may need to further split the report.

For example, if you are processing invoices and want each invoice to be split rather than grouped together for the customer, you would need to split on both RecipientID (customer number) and Invoice Number.

To select a field as a split field, click the check box next to the field.

## Faxing Tab

The screenshot shows the 'Content Properties' dialog box with the 'Faxing' tab selected. The dialog has a title bar with a close button (X) and a menu icon. Below the title bar are several tabs: Summary, Processing, Email, Print/PDF, Overlay, Merge Accts, Split & Create, JMEV, CE Fields, Faxing (highlighted in blue), Attach Pages, and Web. The main area is titled 'Fax Options:' and is divided into three sections:

- Delivery Notification Options:** Includes 'Send Notification on:' with checkboxes for 'Success' and 'Failure', and a 'Notification E-Mail Address:' field with a list icon.
- Fax Servers:** A list box containing 'Fax Server' with scroll arrows and a plus icon.
- Cover Page Options:** Includes 'Coverpage to use when faxing:', 'Sending Company Name:', 'Sending Company Contact:', 'Sending Fax Number:', and 'Sending Phone Number:' fields.

An 'OK' button is located at the bottom right of the dialog.

On the Faxing tab you can configure many fax related options.

To send a notification when a fax is successfully sent or fails, check the Success or Failure check box and enter an e-mail address to notify. To send a notification to an e-mail address pulled from the report, enter the name of the CE Field surrounded by pound signs. IE: #EmailAddress#.

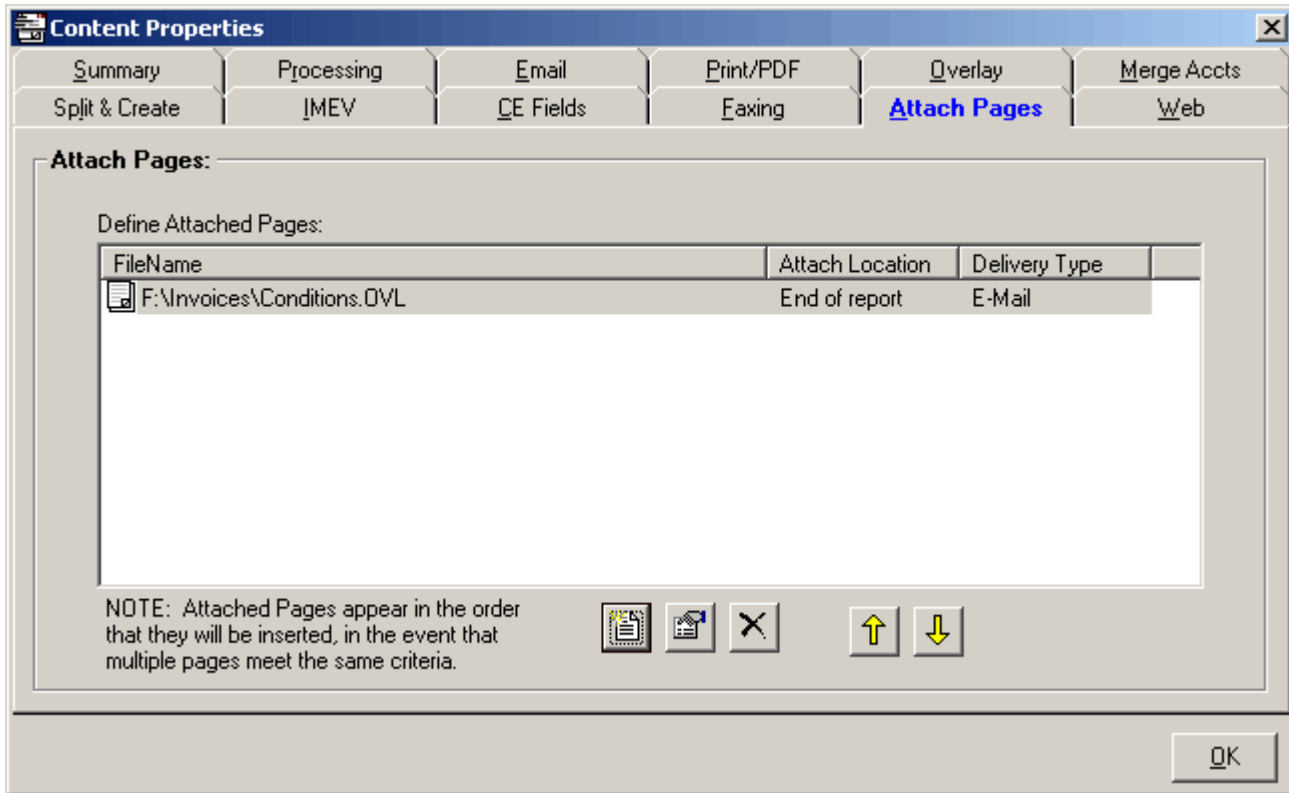
To deliver a report via fax, you must enter at least one fax server. If you are running the fax server on the same machine as the Content Express, then enter the fax server name you used in the Content Express configuration screen.

You can deliver faxes via multiple fax servers. If more than one fax server is entered, Content Express will send fax jobs to the defined fax servers in a round robin fashion.

For remote fax servers (IE fax servers running on another machine) see the section on Configuring Remote Faxing.

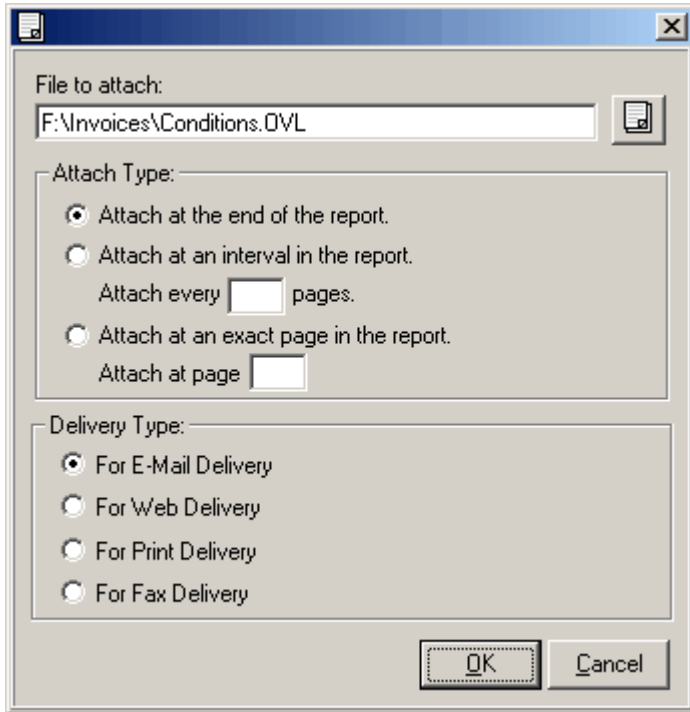
You can have Content Express use a windows fax cover page. Enter the path and file name for the cover page and then enter any of the optional fields for the cover page. The values will be printed out on the cover page.

## Attach Pages Tab



Pages can be attached to report segments when doing a split and create. Currently you can attach report or text files, and LaserVault Overlay Files. This functionality can be used to add disclaimers, signature pages etc.

Click the Add button to add an attachment.



Browse for the file to attach and set the attach options.

You can attach the file to the end of the report, at an interval, or after an exact page in the report.

Next, select the delivery type this attachment applies to.

## Web Tab

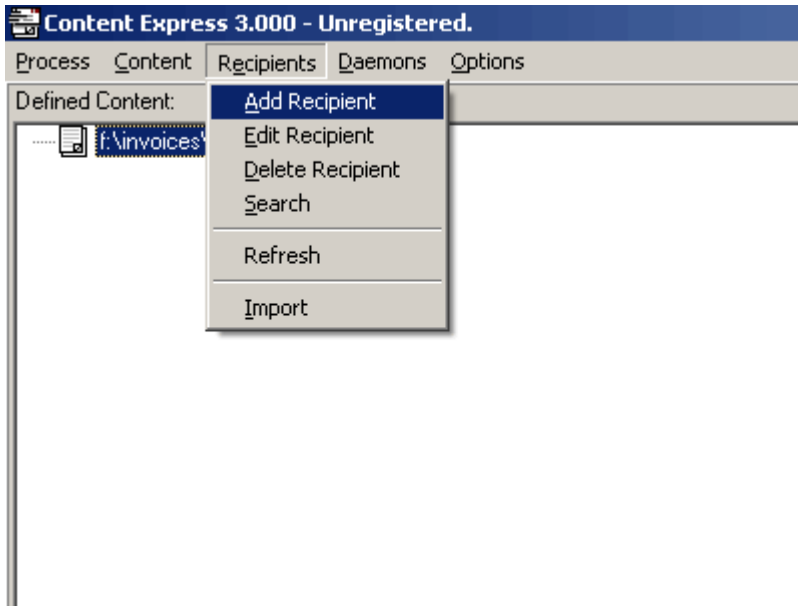
The screenshot shows the 'Content Properties' dialog box with the 'Web' tab selected. The 'Web Options' section is expanded, showing 'Web Delivery Options' with a checkbox for 'Send notification when content is posted to the web.' which is currently unchecked. To the right of this checkbox is a 'Web Delivery Location' dropdown menu with 'ice1.company.com' selected. Below these are text input fields for 'Subject' and 'Message'. The 'OK' button is visible at the bottom right of the dialog.

To send a notification to the recipient when content is delivered to the web, check the Send notification box. You may also enter a subject and message to be sent in the notification e-mail.

Select which web site you would like this report to be delivered to. To define a web location, click the Web tab in the Content Express Configuration tab.

# Working With User Accounts

To manually add a user account, click “Recipients/Add Recipient”.



Enter the properties for the Recipient.

**User Properties**

Recipient ID: 1103235

First Name: John

Last Name: Doe

UserName: jdoe

Password: \*\*\*\*\*

User's E-Mail Address: jdoe@company.com

Fax Number: 800-555-5555

Admin (for Web Interface)

Account Enabled

**Delivery Options**

Via E-mail

Post to Web

Print and mail

Fax

**Attachment Options**

Native Format

PDF Format

HTML Format

**Additional Emails:**

Email Address

**Additional Fax Numbers:**

Fax Number

<< Prev   Next >>   New   OK   Cancel   Apply

For each recipient, you can set their delivery method and attachment type.

You can also define addition e-mail addresses and fax numbers.

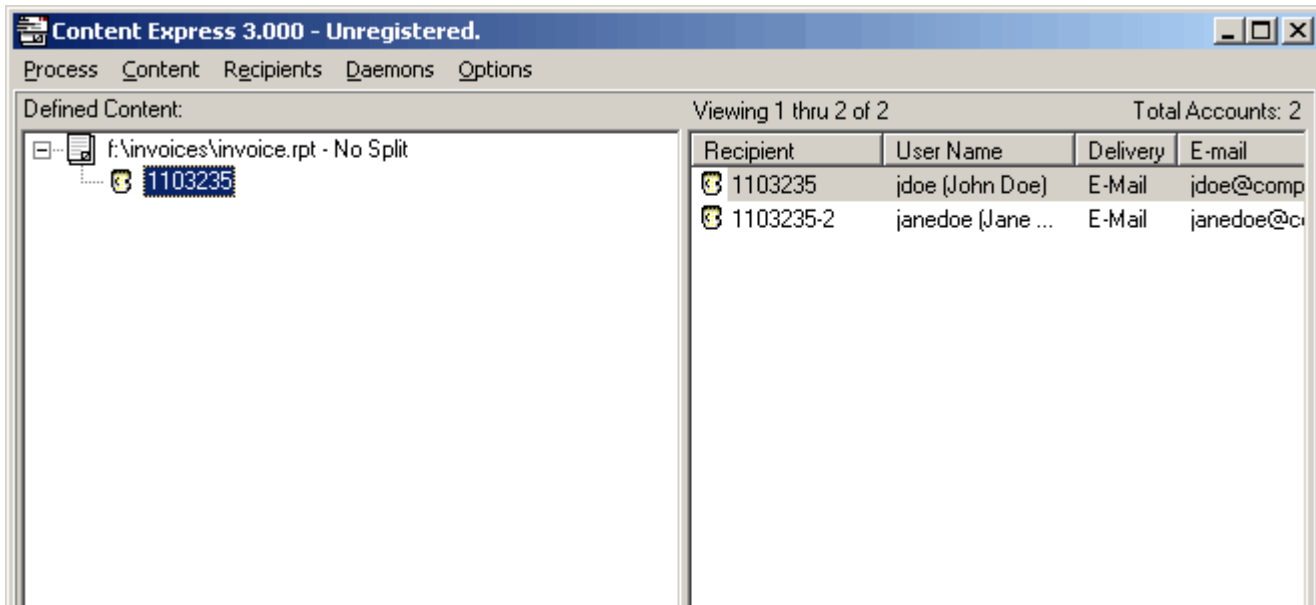
The user name and password are used so the recipient can log into the Content Express web site. Check the Admin box to make a user an admin. This gives the user access to the admin menu on the CE Web Site.

Use the Next and Previous buttons to scroll through the current list of recipients any changes made will be saved.

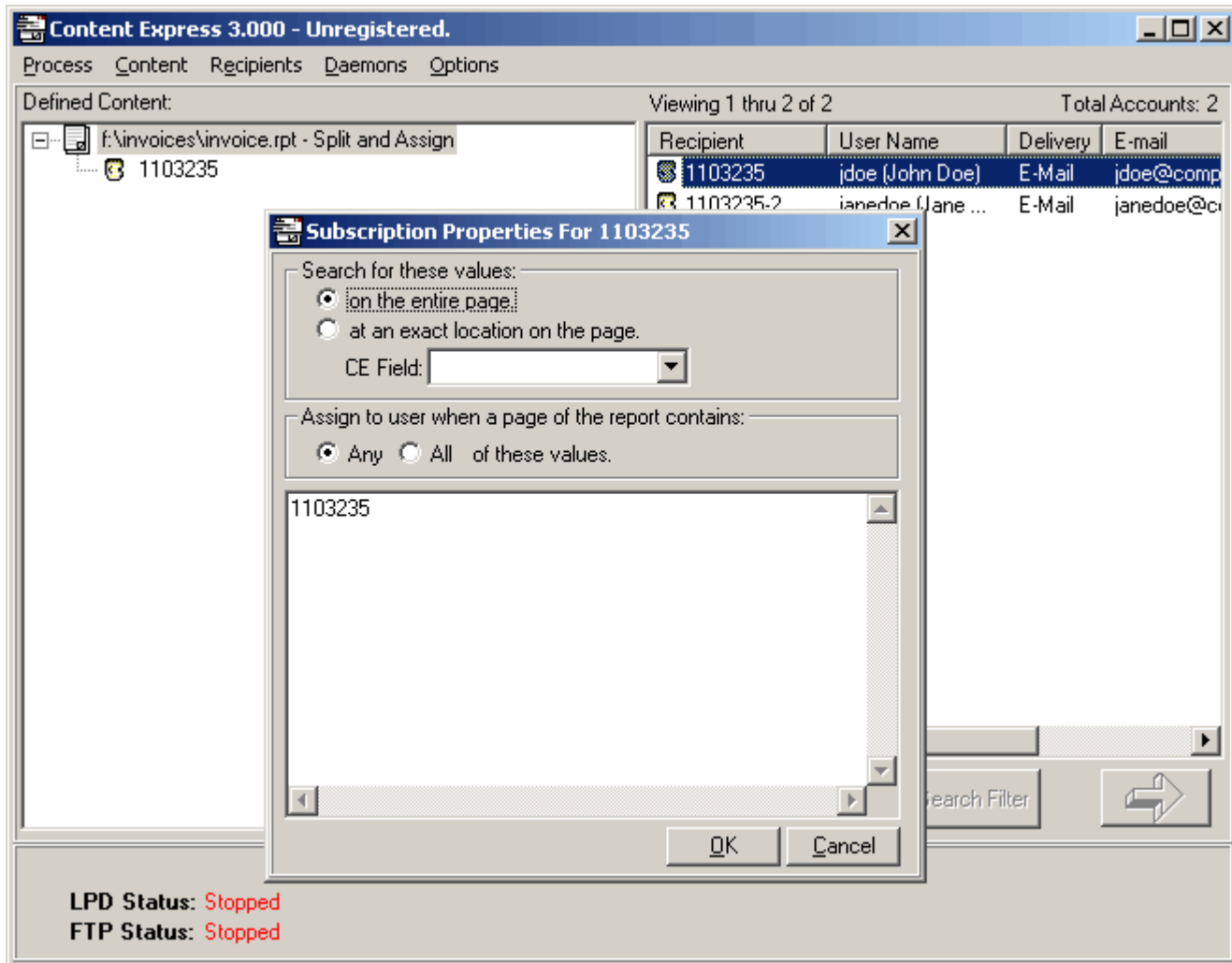
Click the new button to create a new account.

## Adding a Recipient to a Report Subscription

To add a recipient to a report subscription, select the report on the left and drag and drop the recipient from the right. You may also use the Content / Add Subscription menu option.



For a report using Split and Assign processing, there are some additional options.



When you add a recipient, a properties screen will be displayed allowing you to choose criteria.

If you select “search entire page”, Content Express will look for any or all of the literals entered anywhere on the page. If you select “at exact location” an exact spot on the report will be compared to any or all of the literal values in the list.

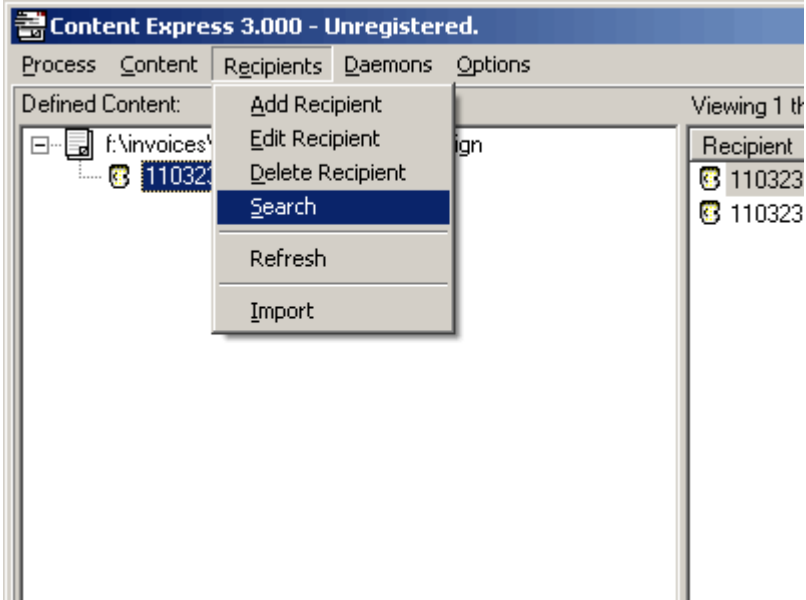
Enter each literal value on a line by it’s self.

If a match is found on the page, the page will be added to the recipient’s report.

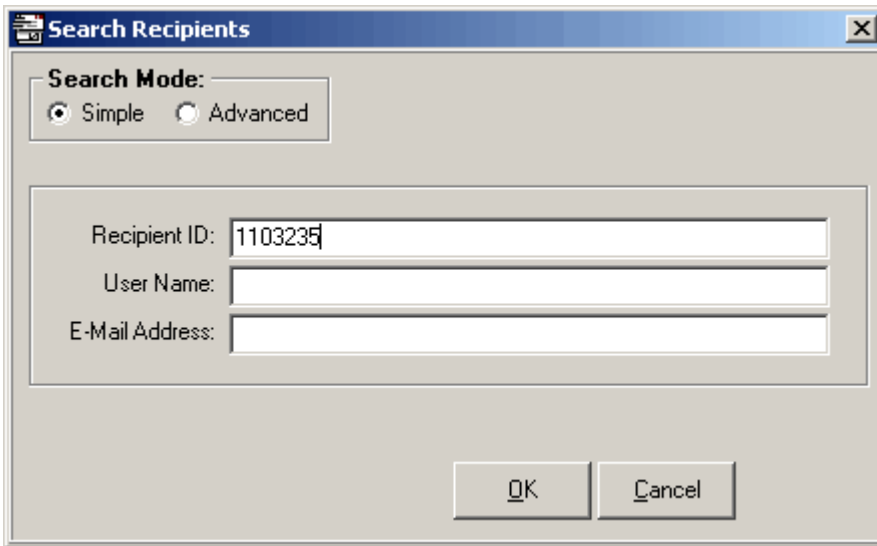
To edit or delete a subscription, click the recipient under the report on the left and press delete, or use the Edit or Delete Subscription menu option.

## Searching User Accounts

To search for recipients, select the search option from the recipient menu.



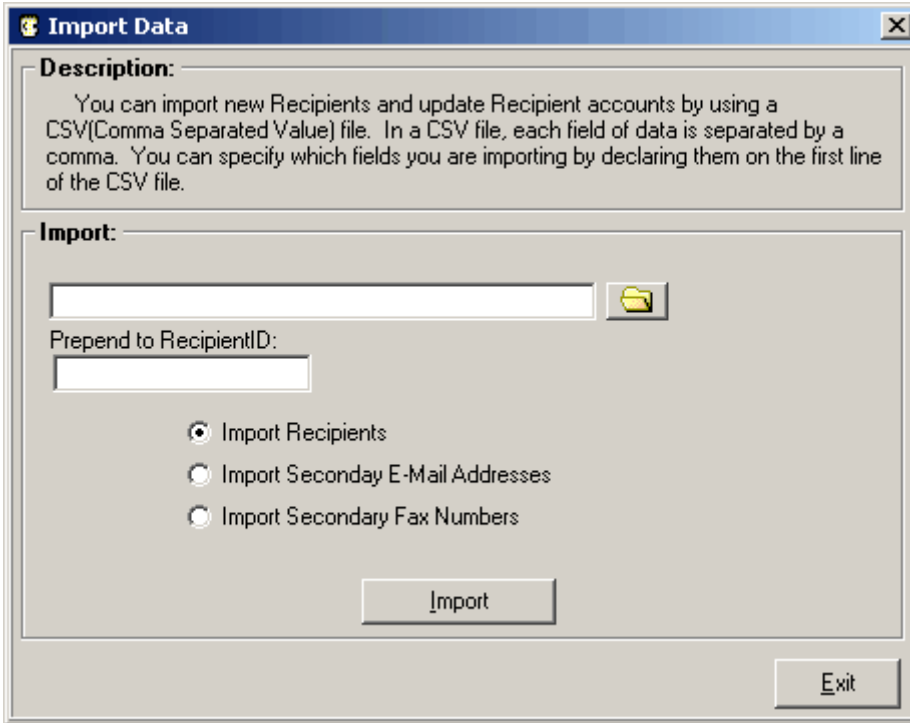
On the search screen, enter the Recipient ID, User Name, or E-Mail Address. Click Advanced to search on other field values.



To view all account, click the Remove Search Filter button on the main Content Express screen.

## Importing Recipients

To help maintain user accounts, you can import recipient data from CSV Files.



To import recipients, secondary E-Mail addresses, or fax numbers, select the Import option from the Recipients menu.

Enter or browse for the comma separated value file.

Select the type of data you are importing and click the import button.

The following fields are imported for recipients:

| Field Name        | Format  |
|-------------------|---|
| RecipientID       | Text no spaces allowed. Up to 100 characters. |
| UserName          | Text no spaces allowed. Up to 100 characters. |
| Password          | Text up to 50 characters.                     |
| FirstName         | Text up to 50 characters.                     |
| LastName          | Text up to 50 characters.                     |
| EmailAddress      | Text up to 100 characters.                    |
| FaxNumber         | Text up to 50 characters.                     |
| DeliveryTypeEMail | Boolean 1/0, Yes/No, On/Off, True/False       |
| DeliveryTypeWeb   | Boolean 1/0, Yes/No, On/Off, True/False       |
| DeliveryTypePrint | Boolean 1/0, Yes/No, On/Off, True/False       |
| DeliveryTypeFax   | Boolean 1/0, Yes/No, On/Off, True/False       |
| AttachPDF         | Boolean 1/0, Yes/No, On/Off, True/False       |
| AttachHTML        | Boolean 1/0, Yes/No, On/Off, True/False       |
| AttachNative      | Boolean 1/0, Yes/No, On/Off, True/False       |
| Enabled           | Boolean 1/0, Yes/No, On/Off, True/False       |
| Admin             | Boolean 1/0, Yes/No, On/Off, True/False       |
| DefaultSearchDays | Numeric                                       |
| Field Name        | Format  |
| RecipientID       | Text no spaces allowed. Up to 100 characters. |
| EMailAddress      | Text no spaces allowed. Up to 100 characters. |

The following fields are imported for secondary e-mail addresses:

The following fields are imported for secondary fax numbers:

| Field Name  | Format  |
|-------------|---|
| RecipientID | Text no spaces allowed. Up to 100 characters. |
| FaxNumber   | Text no spaces allowed. Up to 50 characters.  |

The first row of data must contain the field names.

The data rows themselves must be comma-separated values enclosed in double quotes.

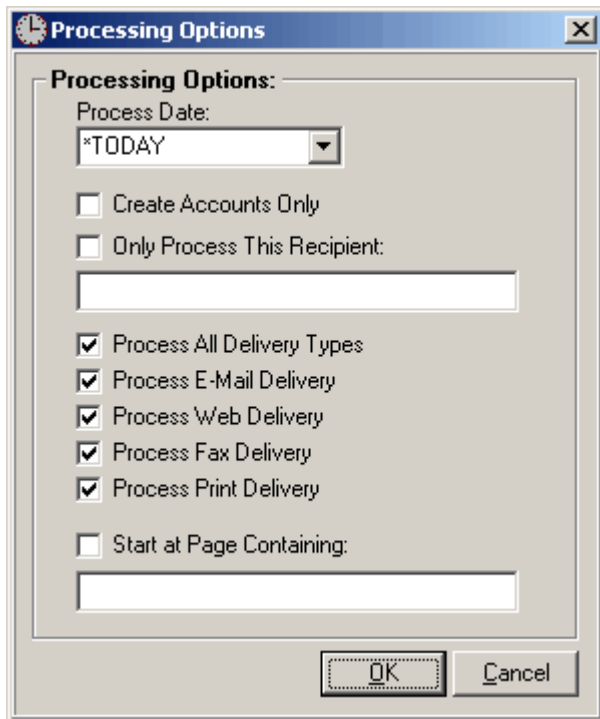
Example:

```
"RecipientID","UserName","Password"
"110223","John","jd123"
```

# Processing Content

To process content, select the file to process and then from the process menu, select Process Selected Content.

This will bring up the processing options dialog.



The process date is the date under which the content will be stored in the web archive. It will also be shown in the default e-mail message for content sent via e-mail if no custom message is defined.

If you have a report setup for split and create and only want to generate the accounts and not actually send any data, check the "Create Accounts Only" option.

To process content for a specific recipient only, check the option and enter the RecipientID in the text box. This is useful when you want to re-send only a specific account without resending the whole batch.

You can also process only a selected delivery type. If for example you wanted to re-send content via e-mail but not re-print or re-post it to the web.

To start at a certain section within a report, check the "Start at Page Containing" option and enter the text criteria to search for. Content Express will search for the criteria and start processing when it finds the first page containing the literal value.

This is useful when printing an entire report and you want to re-start the print job half way through.

## Command Line Processing

For automation and batch purposes, you can launch Content Express using Command Line switches.

**/CID:** [Content ID]

Each defined file has a content id you can use this when calling Content Express to tell it which file to process. You can view the content id on the Processing tab of the content properties screen.

**/RPT:** [Path and RPT Name, Or \*ALL]

You can also use the path and file name to process the content or use \*ALL to process all defined content.

**/DATE:** [MM-DD-YYYY]

This supplies the processing date. This is used for the archive date for content posted to the web.

**/FILE:** [path and file name]

Use this parameter in conjunction with the /CID or /RPT parameter to over ride the physical file path. This allows you to specify an alternate physical file name will still using the configuration setup for the file specified with /CID or /RPT

This parameter is also used in conjunction with the /IMPORT flag to specify the recipient, fax, or e-mail file to import.

**/JOBID:** [job\_description\_no\_spaces]

Use this parameter to enter a job description. This can help track batches that are processed.

**/DEL**

This flag tells Content Express to delete the physical file after processing.

**/IMPORT**

This flag tells Content Express to use the physical file (/FILE) parameter to import recipients, e-mails, or fax numbers.

**/RECIPIENTS**

This flag tells Content Express to import into the recipients table

**/PREPEND:**[Textvalue]

This will cause Content Express to prefix the all imported recipient id's with the specified text value.

**/EMAIL**

This flag tells Content Express to import into the associated e-mails table

**/FAX**

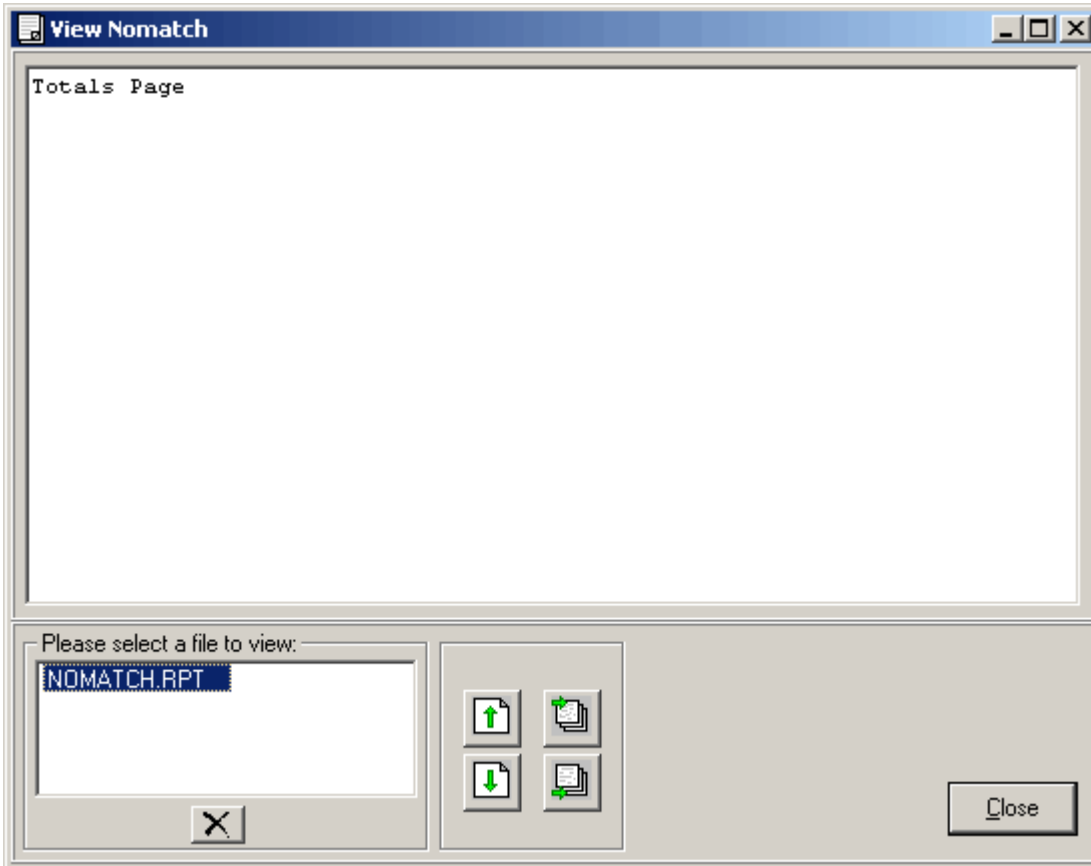
This flag tells Content Express to import into the associated faxes table

# Viewing The No-Match File

When using the split and create option you can choose to have Content Express place any pages that didn't match the split criteria into a no-match file.

The no-match file is cleared before a report is processed.

From the options menu, select View No Match.

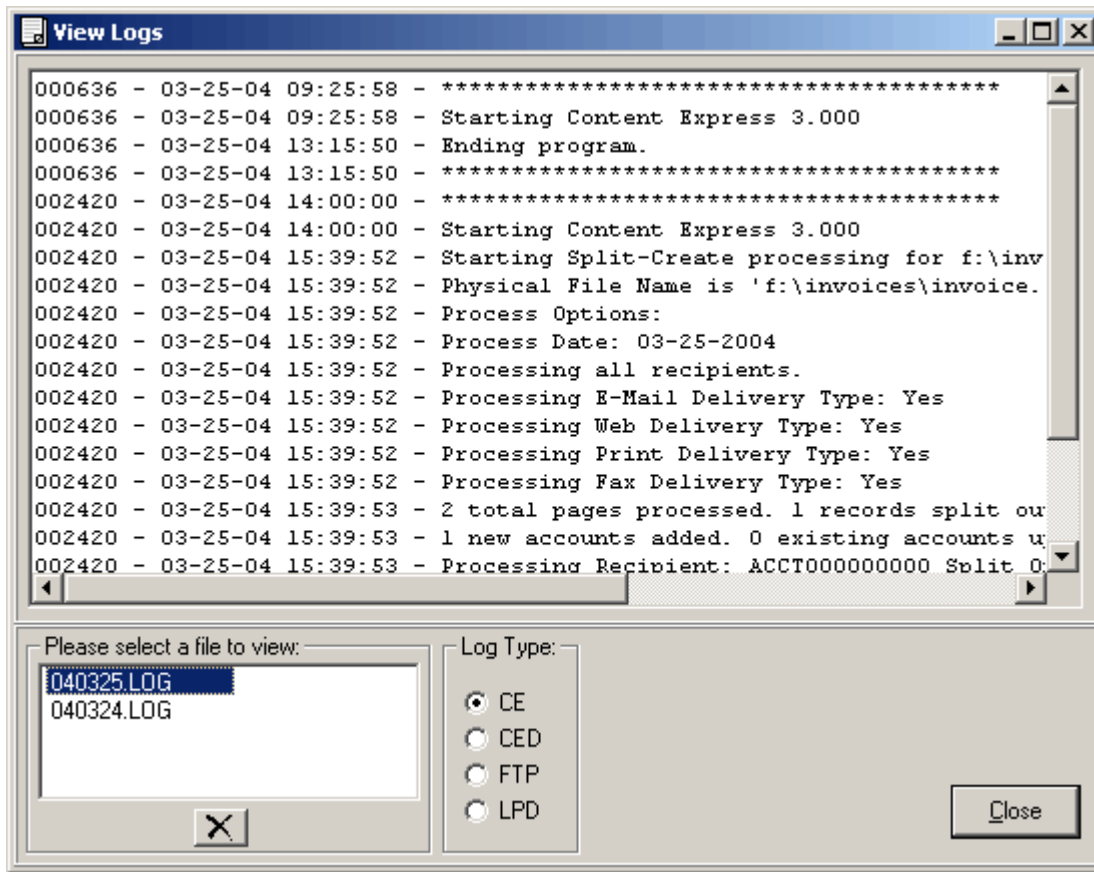


You can use the page up, page down, top and bottom buttons to browse through the no match file.

# Working with Log Files

Content Express creates very detailed log files when processing reports. These can help trouble shoot problems.

To view the logs files, click Options, then View Logs.



To view logs from the different Content Express applications, select the option on the right.

CE will show Content Express logs with information about each file processed and the split and delivery options.

CED will show Content Express Daemon logs with information about the processing of content queued for delivery.

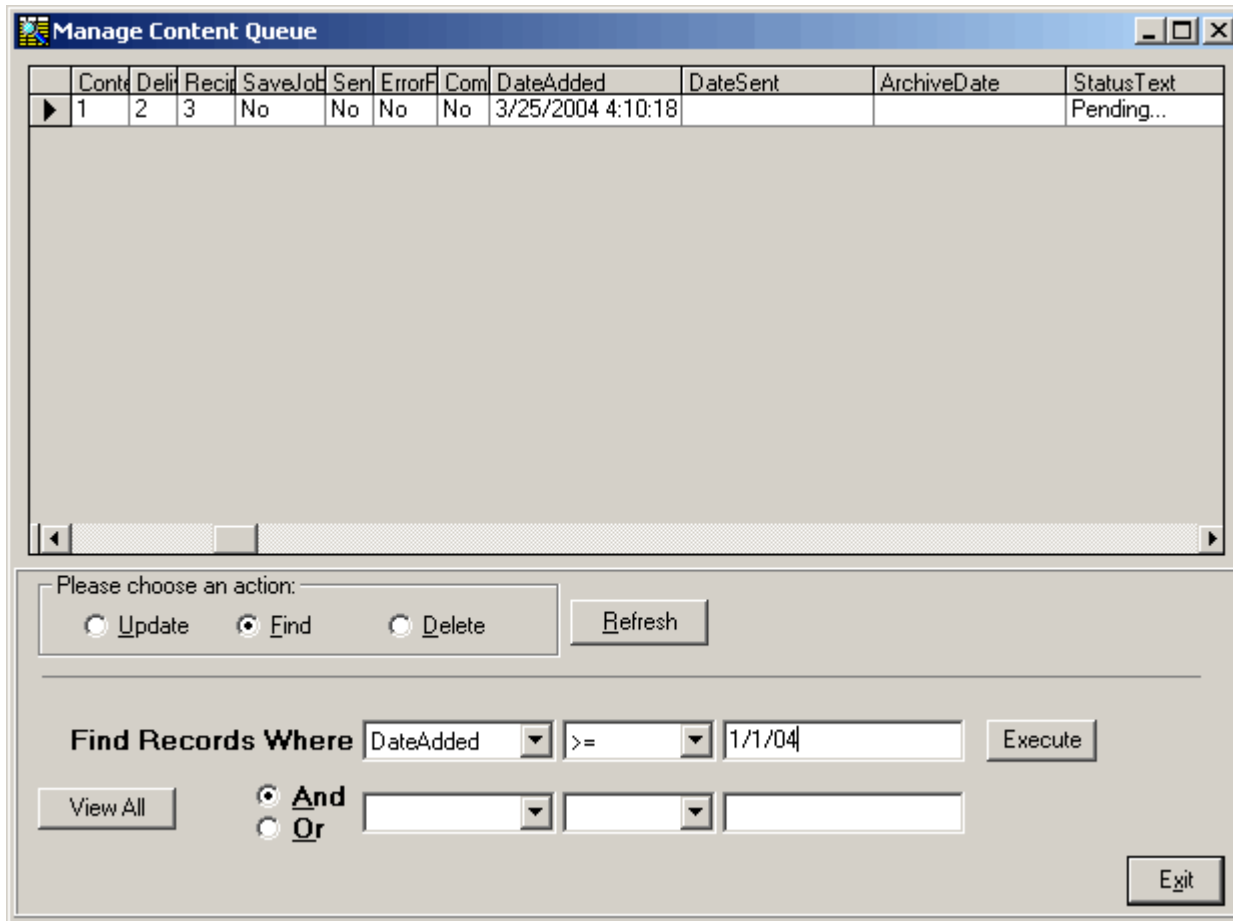
FTP will show logs created by CE FTP.

LPD will show logs create by CE LPD.

# Viewing the Content Queue

Whenever a file or report is processed, the file or report segment is added to the content queue for delivery.

You can view what's currently in the content queue by clicking the Options menu then View Content Queue.



You can filter the results using the Find Records option.

To view a certain type of delivery, search on DeliveryType = [1,2,3 or 4]

- 1 = Web
- 2 = E-Mail
- 3 = Print
- 4 = Fax

To view jobs where an error occurred, search on ErrorFlag = 1

To view all jobs for a date range, search on:

DateAdded >= MM/DD/YY HH:NN:SS AM/PM and DateAdded <= MM/DD/YY HH:NN:SS AM/PM

To view the file associated with the content queue record, double click the record selector at the left of the record.

# Configuring Remote Faxing

Content Express can support faxing from more than one MS Fax Server.

To do this, we install the Content Express Daemon on the remote faxing machine and run it in Fax-Only mode.

The remote Daemon connects to the primary SQL Server and process fax jobs routed to it's machine. It must have network access to the primary Content Express machine in order to load the fax files from the content queue.

Run the CE Fax Only setup program on the remote fax server.

After installation, run CEFaxConfig.exe in the directory where you installed the Content Express daemon.

**Configure Fax**

**SQL:**

SQL Server Name: sql.domain.com

SQL User Name: sa

SQL Password: \*\*\*\*\*

Use NT Authentication

**E-Mail:**

SMTP Server Name: mail.domain.com

SMTP Server Port: 25

SMTP Reply Address: reply@domain.com

**Fax:**

Fax Server Name: FAX2 Fax Prefix:

Path to Content Queue: F:\Program Files\ContentExpress\ContentQueue

OK Cancel

Enter the SQL Server information just as it's entered on the primary Content Express machine. Also enter the SMTP Server information.

Enter the name for the fax server machine, the path to the content queue on the primary machine, and any fax prefix required.

Click OK to save changes.

Finally setup a scheduled task to run the Content Express daemon.

To send faxes to this machine, edit the content properties for the file on the primary machine, and add the fax server name under the faxing tab.

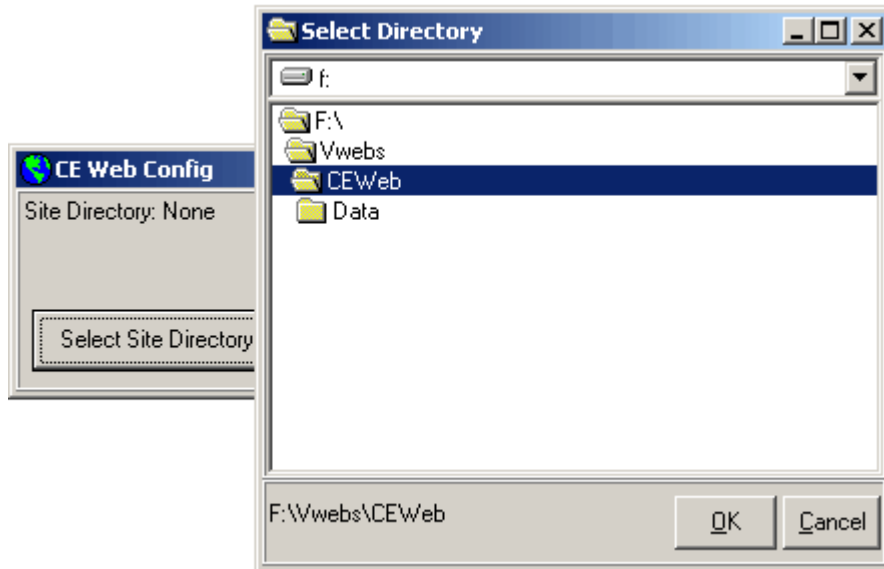
# Configuring Content Express Web Interface.

To configure the web interface, run the CE Web Config setup program.

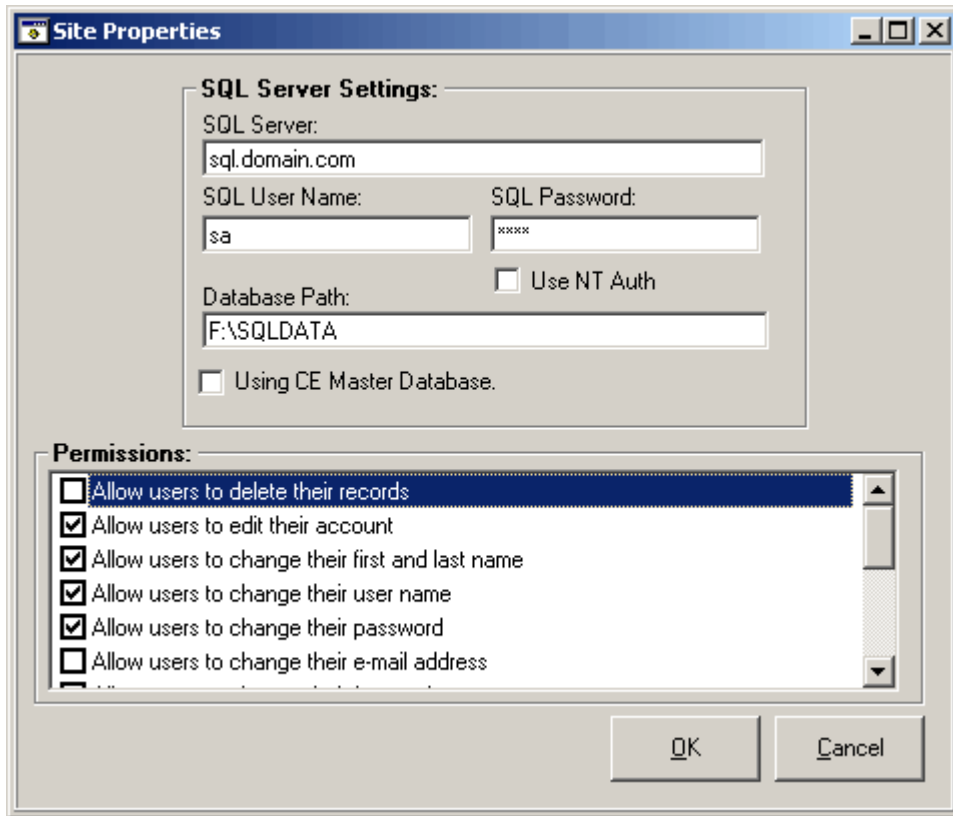
After the installation is complete, start CEWebConfig.exe in the directory where the application files were installed.

With the Content Express web configuration program you can install one or more Content Express web sites on a single machine.

After starting the web config program, select the directory where you would like to install the web interface. You will need to create the directory first.



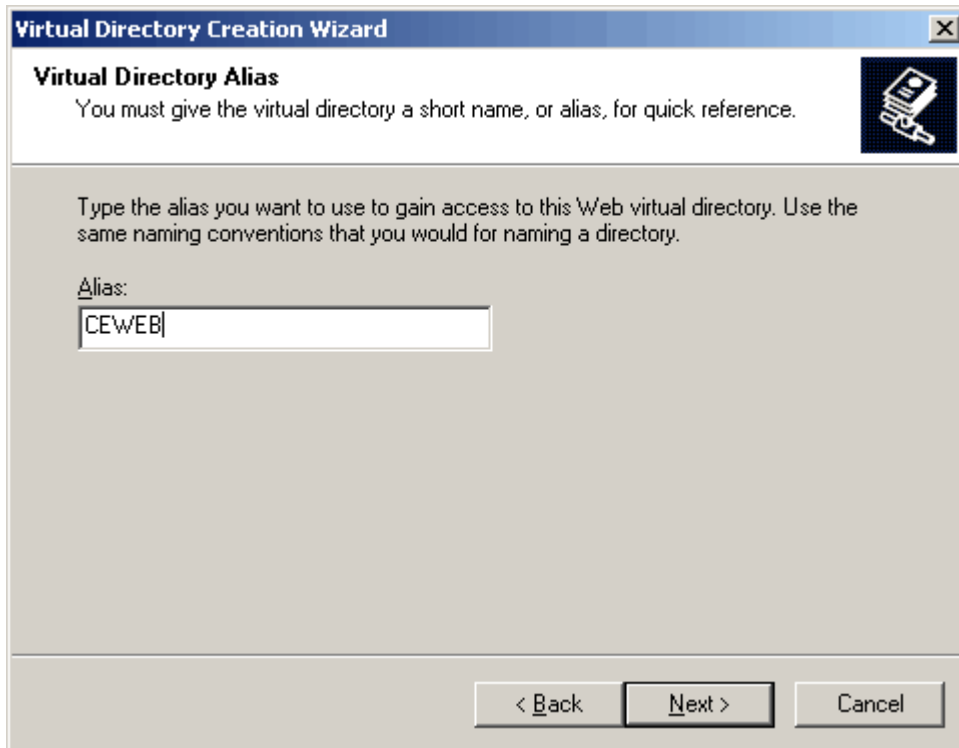
Next configure the site properties.



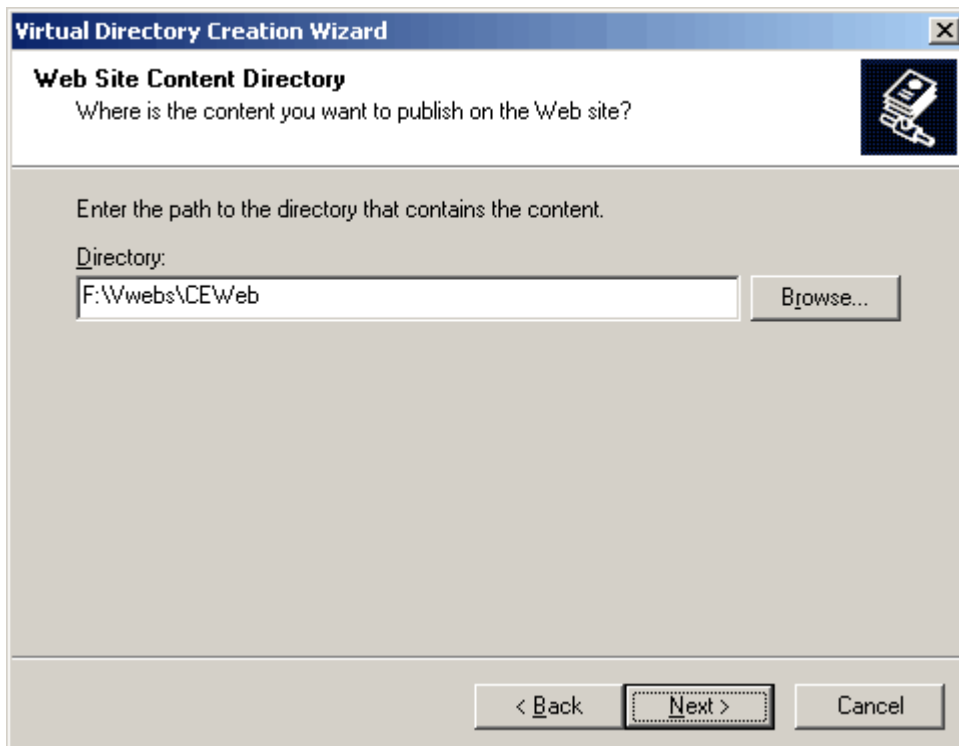
Enter the SQL Server settings. If the web interface is using the same SQL Server as Content Express, then check the "Using CE Master Database" check box.

Set the permissions you wish to allow. You can later change these settings via the web interface if you login with an admin account.

Next, create the virtual directory in IIS. Enter the alias to refer to the Content Express directory.

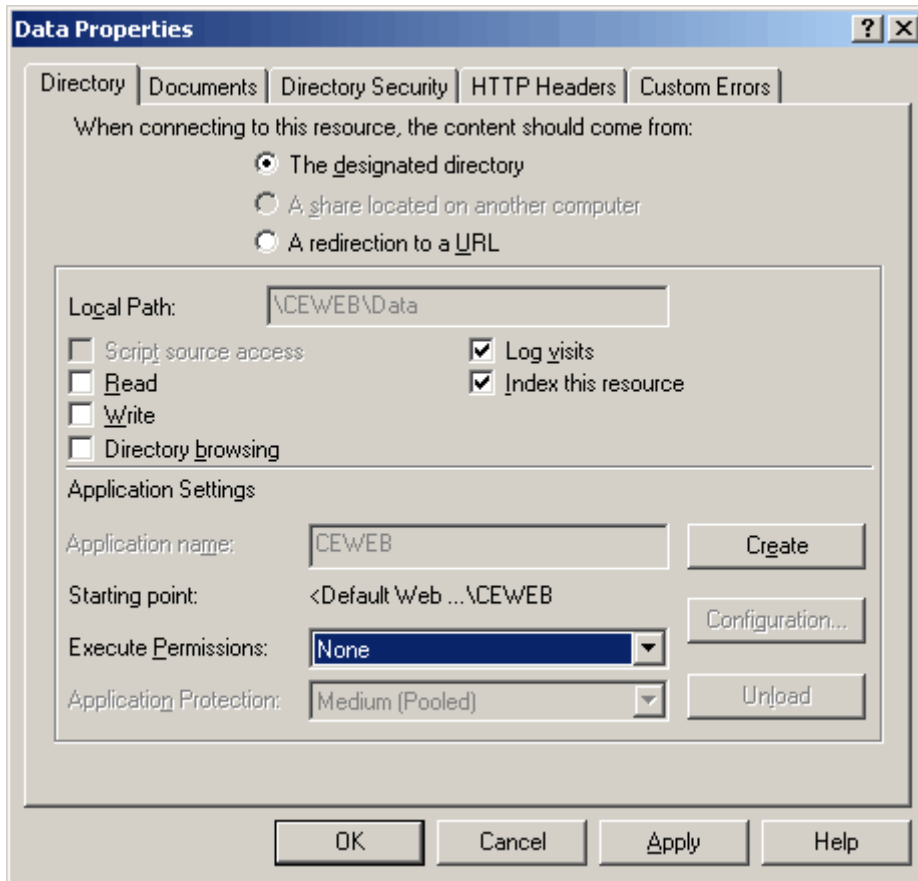


Select the path to the directory where you created the web site.



After finishing the setup, expand the virtual directory and remove read and execute permissions on the Data directory.

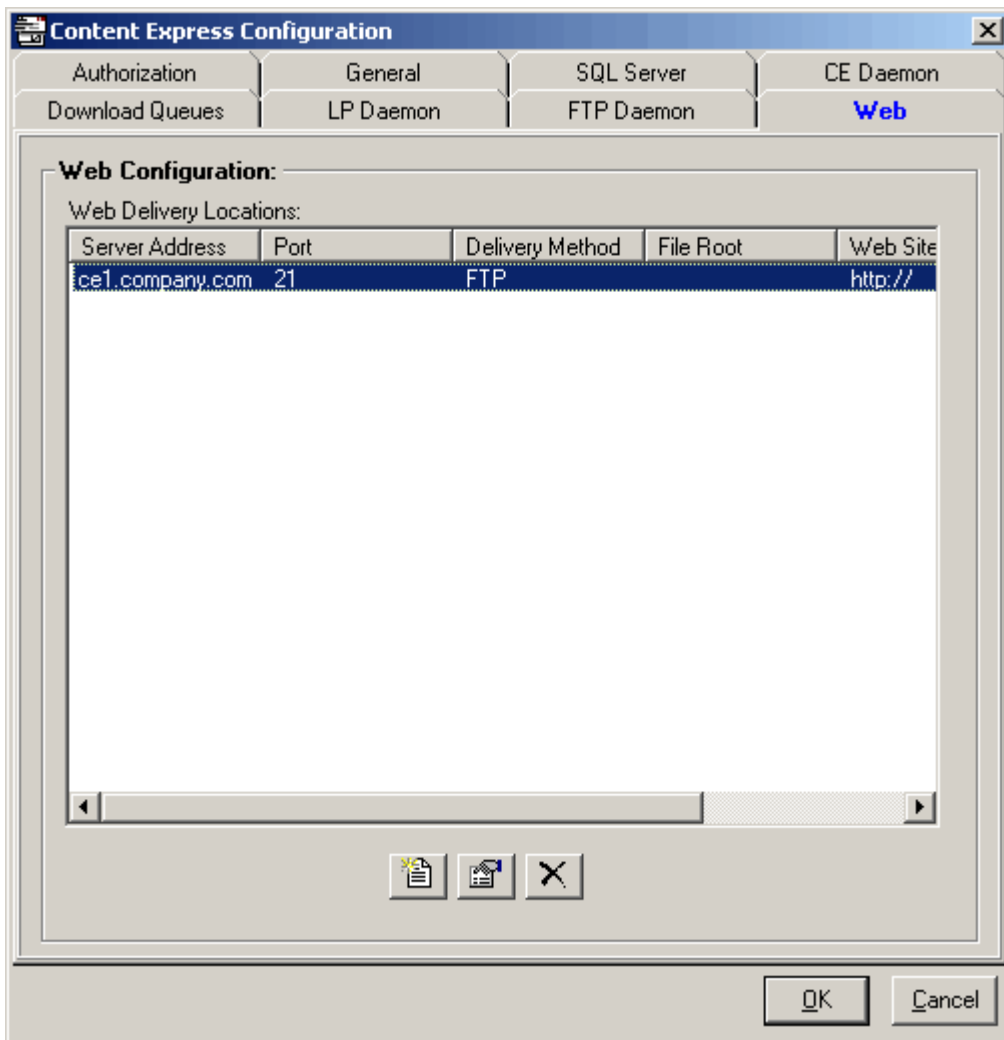
This is where the configuration files and data files are stored.



Be sure to give read write access to the ceweb directory for the windows account that the virtual directory is running as. In most cases the default is IUSR\_[machine name] and IWAM\_[machine name]

After creating the web site in IIS you now need to define the web site in Content Express.

Open the Content Express Configuration screen click on the web tab.



Click the Add button to add a new site.

**Web Delivery Location Properties**

**Server Properties:**

Server Address: ce1.company.com Server Port: 21

User Name: ftpuser Password: \*\*\*\*\*

File Root:

Web Site URL: http://ce1.company.com/ceweb

**File Delivery Method:**

FTP  
 File Copy

Purge Web Archives Older Than: 0 Hours

**SQL Server Properties:**

SQL Server Name: sql

SQL User Name: sa

SQL Password: \*\*\*\*\*

Use NT Authentication

OK Cancel

There are two ways Content Express can deliver content to the web site. The simplest is to copy the files. Use this delivery method if the web site is on the same machine as Content Express, or there is network access to the web server.

When using the file copy method, enter the path to the data directory under CEWeb in the file root field. For example: F:\Program Files\ContentExpress\CEWeb\Data

When using the file copy method, enter a descriptive name for the server address, 0 for the port, and leave the username and password fields blank.

If the web server is outside the network or is locked down restricting network access, you can use FTP to transfer the files.

On the web server machine, setup an ftp account and make it's home directory the Data directory under CEWeb.

Enter the server address, or IP address, the port on which the ftp service is listening (normally 21), the user name, and password to log into the FTP server. If you set the home directory to the Data directory, you can leave the file root blank. Otherwise, enter the path to the data directory relative to the ftp home directory.

Example:

Physical path to the data directory on the web server is:

F:\Vwebs\CEWeb\Data

Home directory for ftp is "F:\"

The file root field should be:

Vwebs/ceweb/data

Next, enter the SQL server settings for this web site. If the web site is on the Content Express machine, then enter the same settings used for Content Express.

The web site URL field is used when a web notification is sent to a user notifying them that their content has been posted to the web. (This URL is added if the custom web notification message is blank)

If you wish to purge old web data, enter the purge settings. Leaving the setting at zero will keep web archive data indefinitely.

After you've defined the web location, you can select which reports or files are delivered to this location by editing the Content Properties. See the Web Tab section under Working with Content Properties.