DocumentBurster
User Guide

Convention - Path Separator

This document uses slash character (/) to display directory and file components of a path.

Microsoft Windows can accept either the backslash (\) or slash (/) characters to separate directory and file components of a path, while the Microsoft convention is to use a backslash (\). Since *DocumentBurster*™ is intended to work on multiple operating systems (e.g. Windows, Linux), the convention for this manual is to use the slash character (/) to display the components of a path.

Part I. Introduction

1. Welcome to *DocumentBurster*™ User Guide

This document will help the reader to get productive with *DocumentBurster*™ in order to burst and distribute business reports. We'll also offer tips on sending personalized e-mails, rich formatted HTML e-mails and on getting the maximum performance from your *DocumentBurster*™ report delivery system.

As for the system requirements, in most of the situations, *DocumentBurster*™ will perform well on any low-end machine which can decently run Windows XP. However, if your enterprise organization is expected to process really huge reports then a more powerful machine will help.

2. What to Expect

In this user guide, you'll learn how to

- Burst and merge PDF reports

- Burst Microsoft Excel reports

- Distribute reports (e.g. payslips, invoices, etc.) through personalized email messages or through FTP

- Execute and automate *DocumentBurster*™ through command line

- Windows Services - install and run *DocumentBurster*™ *Server* as standard Windows Services in order to achieve unattended document delivery

- Schedule reports to be processed and distributed at a specific date and time, to distribute them hourly, daily, weekly, monthly or set up your own frequencies, every other day, third Monday of the month and so on

3. Quick & Professional Support

If you have any questions that aren't answered here, feel free to contact us: `<support@pdfburst.com>`

4. We Need Feedback!

If you find a typographical error in this manual, or if you have thought of a way to make this manual better, we would love to hear from you!

If you have a suggestion for improving the documentation, try to be as specific as possible when describing it. If you have found an error, please include the section number and some of the surrounding text so we can find it easily.

Email address: `<support@pdfburst.com>`

Now let's get started.

Overview

DocumentBurster™ is a powerful solution to schedule, break up (split), merge and distribute reports and can naturally complement any current business intelligence deployment by adding advanced report delivery capabilities.

DocumentBurster™ can process reports generated with an existing in-house reporting platform or with any of the well known leading report writers including Crystal Reports and Web Intelligence (Business Objects/SAP), IBM Cognos, Oracle Hyperion, Microsoft Reporting Services, Microsoft Access, QlikView, JasperReports, Eclipse BIRT, Pentaho, etc.

DocumentBurster™ software is currently used successfully together with business applications like Oracle PeopleSoft, SAP ERP, Oracle Applications, Sage Applications, Microsoft Dynamics, JD Edwards, MYOB and QuickBooks accounting software.

The software has three flavors

- *DocumentBurster*™ has very good report bursting and report distribution capabilities. *DocumentBurster*™ has a desktop based GUI interface which can be used by a single user.

- *DocumentBurster*™ *Server* has all the capabilities of *DocumentBurster*™ and some additional advanced features like scheduling, capability to run as windows services and a browser based web interface which can be accessed simultaneously by multiple people.

- *DocumentBurster*™ *Portal* is our *DocumentBurster*™ cloud-based managed services solution.

1. *DocumentBurster*™

DocumentBurster™ can process PDF or Excel reports.

- The software can break up reports such as pay slips, invoices or statements for each of your employees, customers or partners.

- *DocumentBurster*™ can distribute reports to a wide range of destination types such as Email, FTP, FTPS, SFTP, TFTP, Windows shared drives, Unix Samba servers, WebDAV servers and document management systems.

- The software can publish reports to enterprise portals such as Microsoft Sharepoint Server, SAP NetWeaver, Oracle Portal or IBM WebSphere Portal.

- *DocumentBurster*™ can generate custom dynamic email messages based on email templates.

- The software can generate good looking HTML email messages based on HTML email templates.

2. *DocumentBurster*™ *Server*

DocumentBurster™ *Server* has all the features of *DocumentBurster*™ and some additional advanced capabilities like scheduled report distribution and unattended report delivery in order to achieve the most complex report delivery scenarios.

DocumentBurster™ *Server* can be executed like a long-running Windows service in order to perform report distribution with minimum or no user intervention. *DocumentBurster*™ *Server* services can be configured to start when Windows is booted (and run in the background as long as Windows is running), or they can be started manually, when required.

DocumentBurster™ *Server* is a fully fledged report distribution solution which can be tailored with advanced features to perfectly meet the most complex report bursting and report distribution requirements.

Following capabilities are all achievable with *DocumentBurster*™ *Server,* either as out of the box features, either through the tailoring of the software

- *Distribution Server* - The software can be deployed as a central report bursting and report distribution platform which can be simultaneously accessed by multiple people or legacy applications from within your organization.

- *Cross browser web interface* - *DocumentBurster*™ *Server* has a web based interface available for IE, Firefox, Chrome, Safari and Opera.

- *Unattended report distribution* - *DocumentBurster*™ *Server* can be configured to run like standard Windows services in order to automatically burst and deliver the reports without human intervention.

- *Easy to integrate* - *DocumentBurster*™ *Server* can be easily integrated with existing CRM and ERP kind of applications.

- *Scheduling* - Using *DocumentBurster*™ *Server* it is possible to define simple or complex schedules for executing nightly, weekly or monthly report bursting and report distribution jobs.

- *Parallel report delivery* - *DocumentBurster*™ *Server* has support for parallel report distribution which allows achieving a high throughput of reports which can be distributed in a short period of time.

- *Process any report format* - Out of the box *DocumentBurster*™ *Server* can burst and distribute PDF and Excel reports. If required, the software can be tailored to merge, burst and distribute any report format in addition to the already supported PDF and Excel report types.

- *Organize, store and index the distributed reports* - *DocumentBurster™ Server* can be customized to support advanced storing, indexing and searching capabilities for the distributed reports.

- *Custom deployment model* - *DocumentBurster™ Server* can be deployed as a standalone server, or it can be deployed on various application servers such as Weblogic, Websphere, JBoss etc.

3. *DocumentBurster™ Portal*

DocumentBurster™ Portal is our *DocumentBurster™* cloud-based managed services solution.

DocumentBurster™ Portal allows our customers to focus on their business, instead of their report building, report generation, document distribution or how to build a mechanism to accept customer payments online. *DocumentBurster™ Portal* is a cloud-hosted web software which can be used to generate and send personalized documents to customers, manage and track documents sent to customers and to (optionally) accept payments online from your customers.

Here is how you could manage customer documents (invoices) using *DocumentBurster™ Portal*

Welcome *Admin!*

Logout

Show [10 ▾] entries   📄 PDF 📊 CSV 📈 Excel

Search: [   ]

Code	Customer ▲	Amount	Status ▲	Action ▲	Due Date ▾
11	Stark Industries	2.000,00	Unpaid		01 Oct 2020
10	Nakatomi Trading Corp.	1.100,00	Passed Due	Remind	30 Sep 2015
9	Clampett Oil	1.000,00	Passed Due	Remind	15 Sep 2015
8	Clampett Oil	600,00	Passed Due	Remind	01 Sep 2015
7	Wayne Enterprises	300,00	Passed Due	Remind	15 Aug 2015
3	AmerTek	1.500,00	Paid	OK	01 Aug 2015
1	Acme Corp.	1.000,00	Paid	OK	01 Aug 2015
5	Oceanic Airlines	700,00	Paid	OK	01 Aug 2015
2	Acme Corp.	500,00	Paid	OK	01 Aug 2015
6	Wayne Enterprises	400,00	Paid	OK	01 Aug 2015
	Customer	**Amount**	▽ Status	**Action**	From
					To

Showing 1 to 10 of 11 entries

Part II. DocumentBurster

The sections in Part II present how to configure *DocumentBurster*™ in order to burst and merge reports, distribute reports through personalized messages, automate report processing through report polling and through the command line interface or how to check the status of the processed reports through auditing and tracing.

Burst and Merge PDF Reports

1.1. Burst PDF Reports

DocumentBurster™ is splitting the reports with the help of *burst tokens.* A *burst token* can be anything which is uniquely identifying the document to be extracted such as the invoice ID, customer number or the email address where the document should be distributed.

A burst token is simply any string that is delimited by curly brackets, *{* and *}*. The burst tokens must be inserted into the report pages before feeding the PDF report to *DocumentBurster*™ for processing. *DocumentBurster*™ screens the document for burst tokens, and whenever it finds a new/different burst token it breaks the document.

An example of such token might be *{alfreda.waldback@northridgehealth.org}.* If a page from the report needs to be extracted in a separate document then *DocumentBurster*™ will be informed about this by using *burst tokens.* Please take a look at `Payslips.pdf` report which is available in `samples` folder. Bursting this report will generate three output files `alfreda.waldback@northridgehealth.org`, `clyde.grew@northridgehealth.org` and `kyle.butford@northridgehealth.org` - for the three distinct employees which are found in the input document.

In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Burst**

After bursting is finished, in the `output` folder, following new files will be created

1.1.1. Steps to Follow When Bursting a Report

Following general steps should be followed when bursting a report using *DocumentBurster*™ .

Procedure 1.1. Steps to Follow When Bursting a Report

1. Identify the appropriate *burst token* for the type of report which is being burst. A *burst token* can be anything which is uniquely identifying the document to be extracted such as the invoice ID, customer number or the email address where the document should be distributed.

2. Modify the input report to include the curly brackets, *{* and *}*, around the previously identified burst token.

3. Optionally (usually the default configuration is enough), configure *DocumentBurster*™ to better meet your bursting needs.

4. Burst the report and check the output files.

1.1.2. Burst a Sample Report - `Invoices-Oct.pdf`

The previous steps will be exemplified when bursting the existing `samples/Invoices-Oct.pdf`.

1. Identify the appropriate *burst token.*

   Since we are bursting an invoice report, the burst token is identified as being *Invoice number.* Invoice number is uniquely identifying each separate invoice.

2. Modify the input report to include the curly brackets, *{* and *}*, around the previously identified burst token (invoice number).

   The report generation software should properly fill the burst tokens into the pages of the reports. Please check `samples/Invoices-Oct.pdf` to see how it was modified to include the curly brackets, *{* and *}*, around invoice number/burst token report field.

   Curly brackets to be inserted in the input report around the burst token field

   Give a white font color to the brackets so that the layout of the report will appear unchanged

Invoice number	{0011}

   Invoice Number **field is identified as unique burst token**
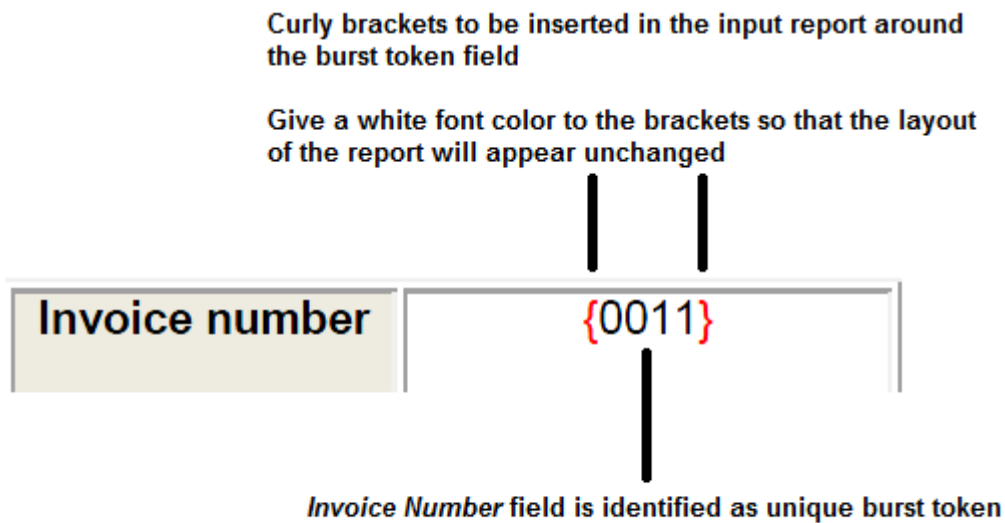
3. Configure *DocumentBurster*™ to generate custom output burst file names.

   By default *DocumentBurster*™ is generating the output file names using the *$burst_token$. $input_document_extension$* configuration. For example, for the previous burst token/invoice number *{0011},* the generated file name will be `0011.pdf`.

   The requirement is to customize the output file names to be similar with `Invoice-0011.pdf,` for the previous burst token/invoice number *{0011}.*

   In *DocumentBurster*™ main window select **Actions** , **Configure** , **General**
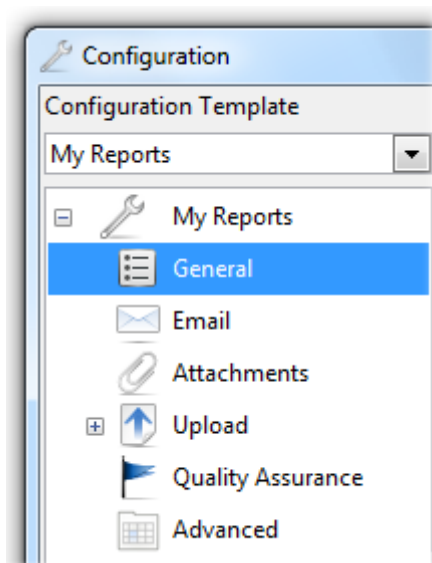
Change the value of the *Burst File Name* configuration to be *Invoice-$burst_token$. $input_document_extension$*

Please see *Section 1.3, "Configuration"* for detailed description of *DocumentBurster*™ configurations.

4. Burst the report and check the output files.

    In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Burst**
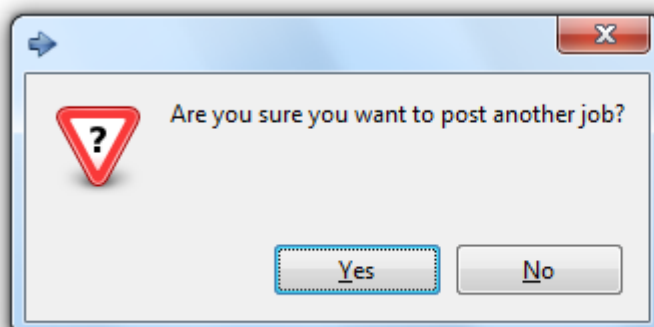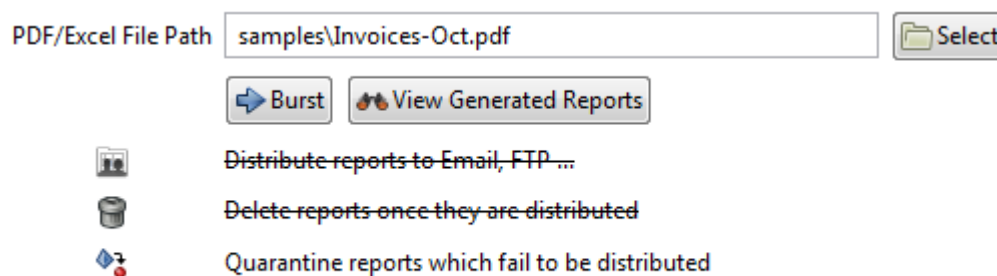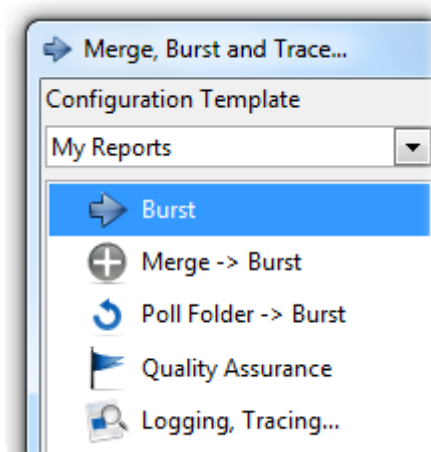
After bursting is finished, in the `output` folder, following new files will be created
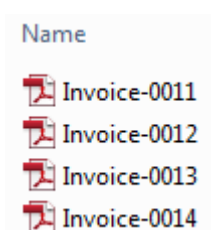
> **Important**
>
> Depending on the business requirements, the report generation software should properly fill the burst tokens into the pages of the reports.

> **Note**
>
> Use a white font color for the burst tokens (or curly brackets, *{* and *}*) so that the visual appearance and the layout of the report will not be affected.

> **Note**
>
> Out of the box *DocumentBurster*™ supports bursting of PDF and Microsoft Excel reports. If there is a need to burst other report formats such as Word reports, Open Office reports, Microsoft PowerPoint presentations (or any other document type) than *DocumentBurster*™ software can be tailored to achieve the bursting and distribution of such report types.

1.2. Merge PDF Reports

Sometimes, prior to bursting, it might be required to merge few reports together and burst the merged result; or you might as well just want to merge few reports or documents.
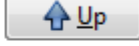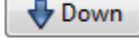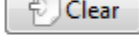
DocumentBurster™ can merge reports through both the command line interface and through the GUI.

In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Merge -> Burst**
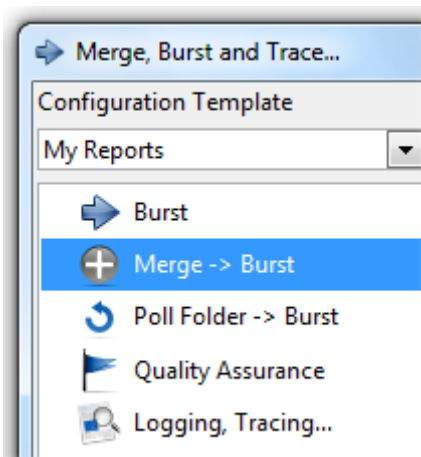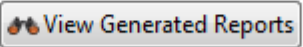
- By default the reports are merged in the selection order. The merge order can be changed using *Up* and *Down* button commands.

- *Merged File Name* - Name of the merged file. Default value is `merged.pdf`

- *Burst Merged File* - If checked, the generated merged file will be also split.

- *View Generated Reports* - Allow browsing of burst/merged reports.

Following properties can be configured in *DocumentBurster*™ configuration screen.

- *Distribute reports to Email, FTP ...* - If strikeout, the software will not distribute the burst reports.

- *Delete reports once they are distributed* - If strikeout, the software will not delete the reports once they are distributed.

- *Quarantine reports which fail to be distributed* - If strikeout, the software will not quarantine the reports which fail to be distributed.

> ℹ **Note**
>
> *Select multiple files* - Using *Ctrl key + left mouse click* it is possible to select multiple files at once.

> ## Note
>
> Out of the box *DocumentBurster*™ can merge PDF reports. If there is a need to merge any other report format (including Word, Excel and any other document type) than *DocumentBurster*™ can be customized to process any report type.

1.3. Configuration

Following settings can be configured in regards with merging and bursting of the reports in *DocumentBurster*™ .

In *DocumentBurster*™ main window select **Actions** , **Configure** , **General**

Burst File Name	$burst_token$.$input_document_extension$
Default Merge File Name	merged.pdf
Output Folder	output/$input_document_name$/$now;format="yyyy.MM
Backup Folder	backup/$input_document_name$/$now;format="yyyy.MM
Quarantine Folder	quarantine/$input_document_name$/$now;format="yyyy
(should be a local folder)	
Poll Folder	poll
(should be an existing local folder)	

☐ Distribute reports to Email, FTP ...

☐ Delete reports once they are distributed

☑ Quarantine reports which fail to be distributed

- *Burst File Name* – Name for the generated files. Default value is *$burst_token$. $input_document_extension$.*

  For example, if the token is *{clyde.grew@northridgehealth.org}* then file name will be `clyde.grew@northridgehealth.org.pdf`.

- *Default Merge File Name* – Name for the merged file. It can be overridden for each individual merge job. Default value is `merged.pdf`.

- *Output Folder* – Used to specify the folder where to place the generated files. Default value is *output/$input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$* .

- *Backup Folder* – Used to specify the folder where to backup the input files. Default value is *backup/$input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$* .

- *Quarantine Folder* – Used to specify the folder where to quarantine the files which fail to be distributed. It should be a local folder and the default value is *quarantine/ $input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$* .

- *Poll Folder* – Used to specify the folder to be polled for incoming reports. It should be an existing local folder and the default value is *poll.*

- *Distribute reports to Email, FTP ...* - If checked, the generated reports will be distributed as part of the bursting process, otherwise no. Default value is unchecked.

- *Delete reports once they are distributed* - If checked, the generated reports will be deleted from the disk once they are distributed, otherwise no. Default value is unchecked.

- *Quarantine reports which fail to be distributed* - If checked, the reports which fail to be distributed will be saved to the quarantine folder, otherwise no. Default value is checked.

> **Note**
>
> *$burst_token$, $input_document_extension$, $input_document_name$* and *$now; format="yyyy.MM.dd_HH.mm.ss"$* are variables and will be replaced at run-time with the value of the token used to burst the report, the extension of the input file, the name of the input file and the current date, formatted. For more details about variables please read *Chapter 5, Variables*

1.3.1. Advanced Settings

Following advanced settings can be further configured in order to allow greater control over how *DocumentBurster*™ works.

> **Note**
>
> In most of the situations the default values will get the job done without the need to change any configuration here.

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Advanced**

- *Start Delimiter (Burst Token), End Delimiter (Burst Token)* – Start and end delimiters used to parse the burst tokens. Default values are *{* and *}* characters.

- *Number of User Variables* - The number of user variables which *DocumentBurster™* will recognize and parse. Default value is 10.

- *Number of Parallel Distribution Jobs* - The number of parallel jobs which *DocumentBurster™* will use when distributing the reports. Default value is 1.

- *Delay Each Distribution By* - The number of seconds which *DocumentBurster™* will wait between each report distribution. For instance this configuration can be used to delay each email distribution by one second. Default value is 0 (seconds).

- *Reuse Last Token Found in Previous Pages (when not available in the current page)* - Configuration which should be enabled when the burst token is provided only on the first (master) page of the report to be extracted and not on all the subsequent pages. Default value is *unchecked* (which means that, out of the box, *DocumentBurster™* expects the burst token to be found on each and every page of the report to be extracted).

- *Allow email addresses with local domain name and no TLD (e.g. documentburster@sharepoint, admin@mailserver1)* - By default *DocumentBurster™* will validate all the email addresses to be in the format string@otherstring.ext.

  Sometimes (while testing locally) it might be required to distribute emails to non standard (local) email addresses (e.g. *documentburster@localhost*)

  Default value is *unchecked* .

Burst Excel Reports

2.1. Overview

DocumentBurster™ can burst and split reports which are generated for the following versions of Microsoft Excel spreadsheet application

- Excel 2010 (version 14) included in Office 2010

- Excel 2007 (version 12) included in Office 2007

- Excel 2003 (version 11) included in Office 2003

- Excel 2002 (version 10) included with Office XP

- Excel 2000 (version 9.0) included with Office 2000

- Excel 97 (version 8.0) included with Office 97

Although it does complex report processing, *DocumentBurster*™ doesn't require Microsoft Excel application to be installed on the machine where *DocumentBurster*™ is deployed. Even more, being a cross platform software, *DocumentBurster*™ can process Excel reports on a Windows or on any UNIX/Linux machine. A common installation scenario is to have *DocumentBurster*™ deployed on a separate dedicated server machine which is responsible for doing asynchronous batch report bursting and scheduled report distribution.

In order to achieve more business scenarios, *DocumentBurster*™ supports two different ways of bursting Excel reports

- Burst by Distinct Sheets

- Burst by Distinct Column Values

Depending on each specific business situation, one or the other of the two distinct bursting methods will be more appropriate. Following paragraphs will give details about each of the supported bursting methods.

2.2. Burst by Distinct Sheets

When bursting Excel reports using this method, *DocumentBurster*™ will generate a separate output file for each Excel sheet which is found in the input report.

The best way to describe this bursting method is by looking at `samples/Payslips-Distinct-Sheets.xls` sample report. This report is provided with *DocumentBurster*™ and contains monthly income data for three fictional employees. The data for each employee is found on a separate sheet and the name of the sheet is the employee's email address.
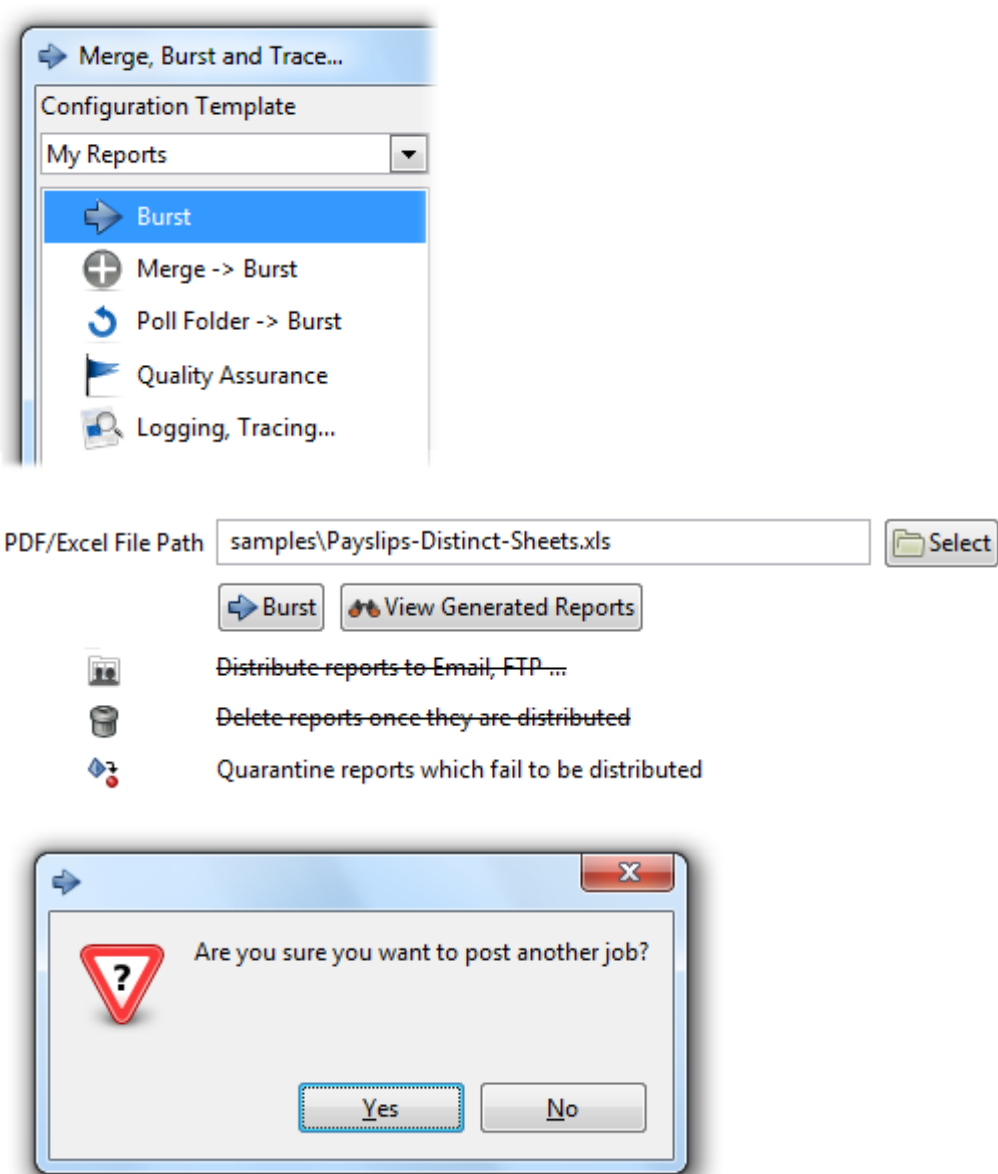
The input report has the following three distinct sheets *cgrew@northridgehealth.org, kbutford@northridgehealth.org* and *awaldback@northridgehealth.org* which, after bursting, will generate the following three distinct files
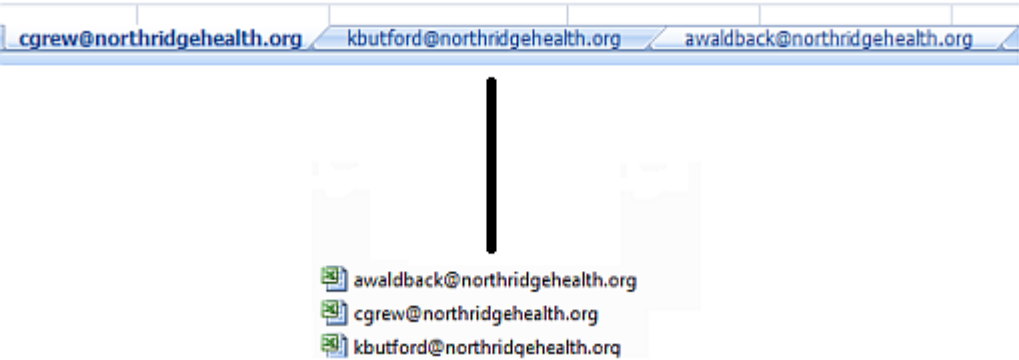
Using email addresses as sheet names for the input report can help when distributing the generated output files by email (if the respective email addresses would actually be valid and existing email addresses). For more details about distributing the generated output reports by email please check *Chapter 3, Distribute Reports* .

This bursting method is straightforward and there is not much more to discuss about it. Following paragraph will present a more complex report bursting method which can generate a separate output file for each distinct value found in a specified column from a specified sheet.

> **i** **Note**
>
> By default, *DocumentBurster*™ will burst Excel reports by distinct sheets and the names of the sheets will be used as burst tokens.

> **i** **Note**
>
> Beside payslips, *DocumentBurster*™ can be configured to break up and distribute any other Excel report types such as invoices, statements, purchase orders, commissions reports or dunning letters.

2.3. Burst by Distinct Column Values

When bursting Excel reports using this method, *DocumentBurster*™ will generate a separate output file for each distinct value found in a specified column from a specified sheet.

Please check the existing sample report `samples/Customers-Distinct-Column-Values.xls` which can be found in `samples` folder. `Customers-Distinct-Column-Values.xls` report contains a list of customers from various countries which, after bursting, *DocumentBurster*™ will generate a separate file with each file containing the customers for the relevant country.
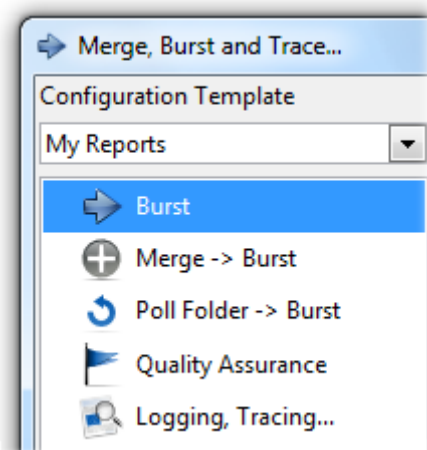
PDF/Excel File Path samples\Customers-Distinct-Column-Values.xls 📂 Select

⏩ Burst   🔍 View Generated Reports

~~Distribute reports to Email, FTP ...~~

~~Delete reports once they are distributed~~

Quarantine reports which fail to be distributed

Are you sure you want to post another job?

Yes   No
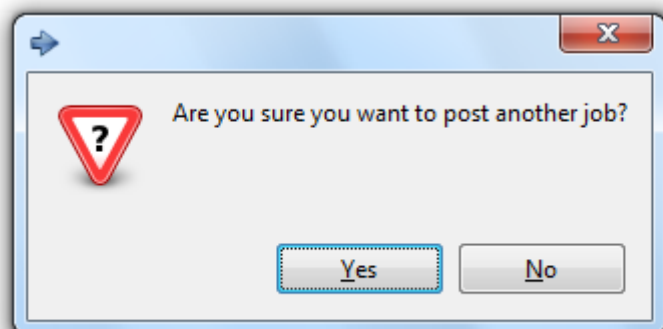
Each configured *burst token* will generate a different output file.

Each *burst token* will generate a different output file.

(*)burstTokens
Germany
Mexico
UK
Sweden
Germany
France
Spain
Canada
Argentina
Switzerland
Brazil
Austria
Italy
Portugal
USA
Venezuela
Ireland
Belgium
Norway
Denmark
Finland
Poland

Name ▲	Size	Type
Argentina.xls	76 KB	Microsoft Excel Wor...
Austria.xls	76 KB	Microsoft Excel Wor...
Belgium.xls	76 KB	Microsoft Excel Wor...
Brazil.xls	77 KB	Microsoft Excel Wor...
Canada.xls	76 KB	Microsoft Excel Wor...
Denmark.xls	76 KB	Microsoft Excel Wor...
Finland.xls	76 KB	Microsoft Excel Wor...
France.xls	77 KB	Microsoft Excel Wor...
Germany.xls	77 KB	Microsoft Excel Wor...
Ireland.xls	76 KB	Microsoft Excel Wor...
Italy.xls	76 KB	Microsoft Excel Wor...
Mexico.xls	77 KB	Microsoft Excel Wor...
Norway.xls	76 KB	Microsoft Excel Wor...
Poland.xls	76 KB	Microsoft Excel Wor...
Portugal.xls	76 KB	Microsoft Excel Wor...
Spain.xls	77 KB	Microsoft Excel Wor...
Sweden.xls	76 KB	Microsoft Excel Wor...
Switzerland.xls	76 KB	Microsoft Excel Wor...
UK.xls	77 KB	Microsoft Excel Wor...
USA.xls	77 KB	Microsoft Excel Wor...
Venezuela.xls	76 KB	Microsoft Excel Wor...

2.3.1. How It Works

The *last sheet* of the input report `samples/Customers-Distinct-Column-Values.xls` is called *burst* and contains the metadata required for bursting the report.

> ### Important - *burst* Sheet
>
> In order to burst by distinct column values it is mandatory that the *last sheet* of the input report will be called *burst* and this sheet should contain the proper (meta)information required for bursting the report.
>
> If *DocumentBurster™* doesn't find the last sheet to have the name *burst* then it will fallback to process the report by using the previous alternative bursting method described in *Section 2.2, "Burst by Distinct Sheets"* .

<table>
<tr><td>★</td><td>

Important - Replace All Excel Formulas With the Corresponding Calculated Values

In order to burst by distinct column values all the formulas (if the report contains formulas) should be pre-calculated before the report is sent for processing to *DocumentBurster™* .

Microsoft Excel documentation - Replace a formula with its result [http://office.microsoft.com/en-us/excel-help/replace-a-formula-with-its-result-HP010066258.aspx]

</td></tr>
</table>

Following screenshot shows how the (meta)information *burst* sheet should look.

A	B	C	D	E	
(*)burstMethod	burstSheetIndex	burstColumnIndex	(*)burstTokens	userVariables	configFile
distinct-column-values	-1	-1	Germany		
			Mexico		
			UK		
			Sweden		
			Germany		
			France		
			Spain		
			Canada		
			Argentina		
			Switzerland		
			Brazil		
			Austria		
			Italy		
			Portugal		
			USA		
			Venezuela		
			Ireland		
			Belgium		
			Norway		
			Denmark		
			Finland		
			Poland		

(*)burstMethod : (distinct-sheets|distinct-column-values) - Required information which specifies the bursting method to be used. Following two valid values are possible

- *distinct-column-values* – should be used when splitting the report by the distinct values found in a column

- *distinct-sheets* – should be used when splitting the input report by each distinct sheet

Default value is *distinct-column-values.*

(*)burstMethod is an information which is mandatory to be provided.

burstSheetIndex - 0 (zero) based index of the sheet which needs to be split. For example, if it is required to split the first sheet then the index should be 0, if second sheet should be split then the index should be 1 and so on.

-1 is an allowed conventional value which means to split the first sheet of the Excel report.

Default value is -1.

burstColumnIndex - 0 (zero) based index of the column to be used when splitting the report. If it is required to split using the first column then *burstColumnIndex* should be defined as 0, if second column is required for splitting then *burstColumnIndex* should be defined as 1 and so on.

Usually the splitting column will be the last column from the splitting sheet. -1 is an allowed conventional value which means to split using the last column from the splitting sheet.

Default value is -1.

(*)burstTokens - required information which specifies the list of distinct burst tokens for which *DocumentBurster*™ should generate a separate output file. For example, in the above screenshot the list of burst tokens contains the set of distinct countries for which *DocumentBurster*™ should generate an output file.

(*)burstTokens is an information which is mandatory to be provided.

userVariables - information to be provided in case there is a need to specify custom user variables for each distinct burst token. For more details on how to define user variables when bursting Excel reports please read *Chapter 5, Variables* .

configFile - information to be provided in case there is a need to process distinct Excel report types by using a different set of program configurations. By default, if no custom *configFile* is provided, *DocumentBurster*™ is processing all Excel reports using the default configuration file `./config/burst/settings.xml`. This should be fine in most situations, however there are cases when different reports will require different sets of configurations. For more details about how to process Excel reports using a custom configuration file please read *Section 4.2, "Process Excel Reports Using a Custom Configuration File "* .

Next screenshot shows how the report `samples/Customers-Distinct-Column-Values.xls` was configured in order to be processed by *DocumentBurster*™ . For reasons of better visualization, the last column which is only used in this sample report for the purpose of report bursting, it is highlighted with the yellow color. It is not mandatory that the bursting column should have a specific color. Usually the burst column will be a hidden Excel column which will not be visible to the normal report users but only defined for the purpose of bursting the report.

(1) - *DocumentBurster*™ will keep the "empty rows" in the output reports. This is useful for keeping in the output files various headers and/or footers which a report might have.

	A	B	C	D	E
1	**Customer List**			*XYZ* Limited	
2					
3					
4					①
5	**Customer Name**	**City**	**Country**	**Contact Name**	
6	Alfreds Futterkiste	Berlin	Germany	Maria Anders	Germany
7	Ana Trujillo Emparedados y helado:	México D.F.	Mexico	Ana Trujillo	Mexico
8	Antonio Moreno Taquería	México D.F.	Mexico	Antonio Moreno	Mexico
9	Around the Horn	London	UK	Thomas Hardy	UK
10	Berglunds snabbköp	Luleå	Sweden	Christina Berglund	Sweden
11	Blauer See Delikatessen	Mannheim	Germany	Hanna Moos	Germany
12	Blondel père et fils	Strasbourg	France	Frédérique Citeaux	France
13	Bólido Comidas preparadas	Madrid	Spain	Martín Sommer	Spain
14	Bon app'	Marseille	France	Laurence Lebihan	France
15	Bottom-Dollar Markets	Tsawassen	Canada	Elizabeth Lincoln	Canada
16	B's Beverages	London	UK	Victoria Ashworth	UK
17	Cactus Comidas para llevar	Buenos Aires	Argentina	Patricio Simpson	Argentina
18	Centro comercial Moctezuma	México D.F.	Mexico	Francisco Chang	Mexico
19	Chop-suey Chinese	Bern	Switzerland	Yang Wang	Switzerland
20	Comércio Mineiro	São Paulo	Brazil	Pedro Afonso	Brazil
21	Consolidated Holdings	London	UK	Elizabeth Brown	UK
22	Die Wandernde Kuh	Stuttgart	Germany	Rita Müller	Germany
23	Drachenblut Delikatessen	Aachen	Germany	Sven Ottlieb	Germany
24	Du monde entier	Nantes	France	Janine Labrune	France
25	Eastern Connection	London	UK	Ann Devon	UK
26	Ernst Handel	Graz	Austria	Roland Mendel	Austria
27	Família Arquibaldo	São Paulo	Brazil	Aria Cruz	Brazil
28	FISSA Fabrica Inter. Salchichas S.	Madrid	Spain	Diego Roel	Spain
29	Folies gourmandes	Lille	France	Martine Rancé	France ②
30	Folk och fä HB	Bräcke	Sweden	Maria Larsson	Sweden
31	France restauration	Nantes	France	Carine Schmitt	France
32	Franchi S.p.A.	Torino	Italy	Paolo Accorti	Italy
33	Frankenversand	München	Germany	Peter Franken	Germany
34	Furia Bacalhau e Frutos do Mar	Lisboa	Portugal	Lino Rodriguez	Portugal
35	Galería del gastrónomo	Barcelona	Spain	Eduardo Saavedra	Spain

(2) - Last column contains the values from which *DocumentBurster*™ will decide which Excel row goes to which output file. It can have any color and will usually be a hidden Excel column.

2.3.1.1. *Copy Report Header/Footer*

In real life most Excel reports will have a header and/or a footer (e.g. the company name/logo, the name of the report etc.) which is statically defined and which should be copied *ad litteram* to each of the output files.

(1) - DocumentBurster™ keeps the *"empty rows"* in the output reports. This is used to copy the static report headers or footers (and any other static row) to the output reports.

2.3.2. Steps to Follow When Bursting an Excel Report by Distinct Column Values

Following general steps should be followed when bursting an Excel report by distinct column values.

Procedure 2.1. Steps to Follow When Bursting an Excel Report by Distinct Column Values

1. Identify the appropriate *burst token* for the type of report which is being burst. A *burst token* can be anything which is uniquely identifying the document to be extracted such as the invoice ID, customer number or the email address where the document should be distributed.

2. Configure and prepare the input Excel report to include the (meta)information (the *burst* sheet) required for bursting the document.

3. This step is required only if the report contains Excel formulas. Before the report is sent for processing to *DocumentBurster™* all the formulas should be pre-calculated and replaced with the corresponding values.

   See *Microsoft Excel documentation - Replace a formula with its result* [http://office.microsoft.com/en-us/excel-help/replace-a-formula-with-its-result-HP010066258.aspx] for more details.

4. Burst the report and check the output files.

2.3.3. Sample - `Customers-Distinct-Column-Values.xls`

The previous steps will be exemplified when bursting the same `samples/Customers-Distinct-Column-Values.xls`.

1. Identify the appropriate *burst token.*

   The report to be burst contains a list of customers and each customer has a country of origin. The requirement is to break the report by country and each output file should contain the customers from the relevant country.

   The *burst token* is identified as being the *Country* column.

2. Configure and prepare the input Excel report to include the (meta)information required for bursting the document.

   In order to burst by distinct column values it is mandatory that the *last sheet* of the input report will be called *burst* and this sheet should contain the proper (meta)information required for bursting the report.

-1 is an allowed conventional value which means to split the first sheet of the Excel report

-1 is an allowed conventional value which means to split using the last column from the splitting sheet

A	B	C	D	E	
(*)burstMethod	burstSheetIndex	burstColumnIndex	(*)burstTokens	userVariables	configFile
distinct-column-values	-1	-1	Germany		
			Mexico		
			UK		
			Sweden		
			Germany		
			France		
			Spain		
			Canada		
			Argentina		
			Switzerland		
			Brazil		
			Austria		
			Italy		
			Portugal		
			USA		
			Venezuela		
			Ireland		
			Belgium		
			Norway		
			Denmark		
			Finland		
			Poland		

Burst tokens are defined as the list of countries

The last column from the splitting sheet is yellow (for better visualization) and is added only for the purpose of bursting the report. The bursting column doesn't need to have a specific color and will usually be an invisible Excel column (so that the normal report user will not see it).

(1) - Extra column which is added for the purpose of splitting the report. It can be defined as a hidden Excel column so that it will be invisible to the normal report users.

3. Calculate and replace Excel formulas with the corresponding values

    `Customers-Distinct-Column-Values.xls` sample report doesn't contain any Excel formula, so there is nothing to do for this report in regards with that.

4. Burst the report and check the output files.

    Burst `samples/Customers-Distinct-Column-Values.xls` report and check the list of output files, one Excel file for each country with each output file containing the list of customers from the specific country.

Distribute Reports

3.1. Overview

Your partners might need their reports to be sent through various distribution channels. Most of them will prefer email but others will rather use FTP. Some customers might have their own automated software systems to further process the reports and might expect the files to be placed in a specified remote location. Others might have more strict security related requirements and will prefer the FTPS protocol. In some scenarios the generated reports should be uploaded through an enterprise portal like *Microsoft SharePoint* .

DocumentBurster™ offers a broad range of destination types like email, local files, FTP, FTPs, SFTP and TFTP, Windows shared drives, UNIX Samba servers and WebDAV servers. WebDAV protocol is used to distribute the reports to enterprise web portals such as *Microsoft SharePoint* , *Oracle Portal* or *SAP NetWeaver* .

3.2. Enable Report Distribution

In order to distribute the reports, the following configuration needs to be checked.

In *DocumentBurster*™ main window select **Actions** , **Configure** , **General**

Burst File Name	$burst_token$.$input_document_extension$
Default Merge File Name	merged.pdf
Output Folder	output/$input_document_name$/$now;format="yyyy.MM
Backup Folder	backup/$input_document_name$/$now;format="yyyy.MM
Quarantine Folder	quarantine/$input_document_name$/$now;format="yyyy

(should be a local folder)

Poll Folder	poll

(should be an existing local folder)

☑ Distribute reports to Email, FTP ...

☐ Delete reports once they are distributed

☑ Quarantine reports which fail to be distributed

Distribute reports to Email, FTP ... - If checked, the generated reports will be distributed as part of the bursting process, otherwise no. Default value is unchecked.
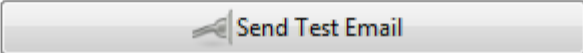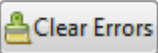
3.3. Distribute Reports by Email

3.3.1. Email Connection Settings

DocumentBurster™ can distribute reports using a *Microsoft Exchange* email server or using any other SMTP compliant email server. For testing purposes it's possible to configure *DocumentBurster*™ to send emails through free (SMTP) email providers like *Hotmail* , *Yahoo! Mail* , *Gmail* , etc.

In order to distribute reports by email, the email server connection settings should be properly configured.

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Email** , **Connection Settings**

From Name	From Name	🔍 Variables
From Email Address	from@emailaddress.com	🔍 Variables
Host	Email Server Host	🔍 Variables
User Name	From Email User ID	🔍 Variables
Password	••••••••••••••••••••	🔍 Variables
Port	25	🔍 Variables

☐ SSL Enabled

☐ TLS Enabled

Test Connection | Send Test Email | 🔒 Clear Errors

The email configuration is straightforward. The most important settings are the host, the user name, the password and the port. If an email server with SSL or TLS support (e.g. *Gmail* , etc.) is used then the appropriate checkboxes need to be selected.

Send Test Email can be used to test that the provided email settings are correct.

3.3.1.1. Microsoft Exchange Server

DocumentBurster™ works when configured with correct *Microsoft Exchange* SMTP server connection settings. *DocumentBurster*™ communicates with the *Microsoft Exchange* email server through SMTP similar with how the *Microsoft Outlook* email client software does. Check the *Microsoft Exchange* SMTP connection settings configured in any working *Microsoft Outlook* software installation. Providing the same (Outlook) SMTP settings to *DocumentBurster*™ it's an easy way to get *DocumentBurster*™ to send emails through yours organization *Microsoft Exchange* server.

3.3.1.2. Cloud Email Providers

Microsoft Office 365

DocumentBurster™ can be configured to send emails through the cloud *Microsoft Office 365* service. Please refer to the following documentation and see the *Microsoft Office 365* SMTP settings to be configured with *DocumentBurster*™

Microsoft Office 365 SMTP configuration [https://technet.microsoft.com/en-us/library/dn554323(v=exchg.150).aspx#HowtoconfigSMTPCS]

3.3.1.3. Free cloud email services - Hotmail, Yahoo! Mail, Gmail

For testing few reports *DocumentBurster*™ can be configured to send emails through any (free) SMTP cloud email service provider.

No matter which of these free email services are used, you must be aware of the "rate limit" (the limit for sending emails) established by your email account provider (i.e. *Microsoft* , *Gmail* , *Yahoo*).

Gmail can be configured for testing few reports. If you are interested to test *DocumentBurster*™ with *Gmail* , *please read this Gmail documentation.* [https://support.google.com/mail/ answer/13287?hl=en]

Yahoo! Mail , *Hotmail* and other big email providers have POP3 support and can be configured with *DocumentBurster*™ . Please read the POP3 support documentation of the specific email provider which you have the intention to use.

> **i**
>
> **Note**
>
> If required, a network or IT administrator from your organization should be able to give further help in configuring the email server settings.

> **Important**
>
> If there is a firewall or anti-virus software which is enabled in-between *DocumentBurster*™ and the email server, in such case, the protecting software might need to be configured and allow *DocumentBurster*™ to send emails as a good and trustable citizen.

3.3.2. Dynamic Email Connection Settings

If required, using variables, the email connection settings can be dynamically filled at run-time when the reports are being distributed.

For example, your organization might have few departments (e.g. human resources/payroll, financial/accounting, travel department, etc.) and each department will need to distribute their own set of reports. Payslip reports (which are being distributed by the human resources/payroll department) should be sent using the *payroll@yourcompany.com* email account, invoices should be sent using *finance@yourcompany.com* and so on.

Variables, which are described with more details in *Chapter 5, Variables* , can be used to achieve such a requirement. Instead of hard-coding the sender email account as being *payroll@yourcompany.com* or *finance@yourcompany.com,* using variables, it is possible to dynamically fill the email connection details when the reports are being distributed (at that time the sender is known).
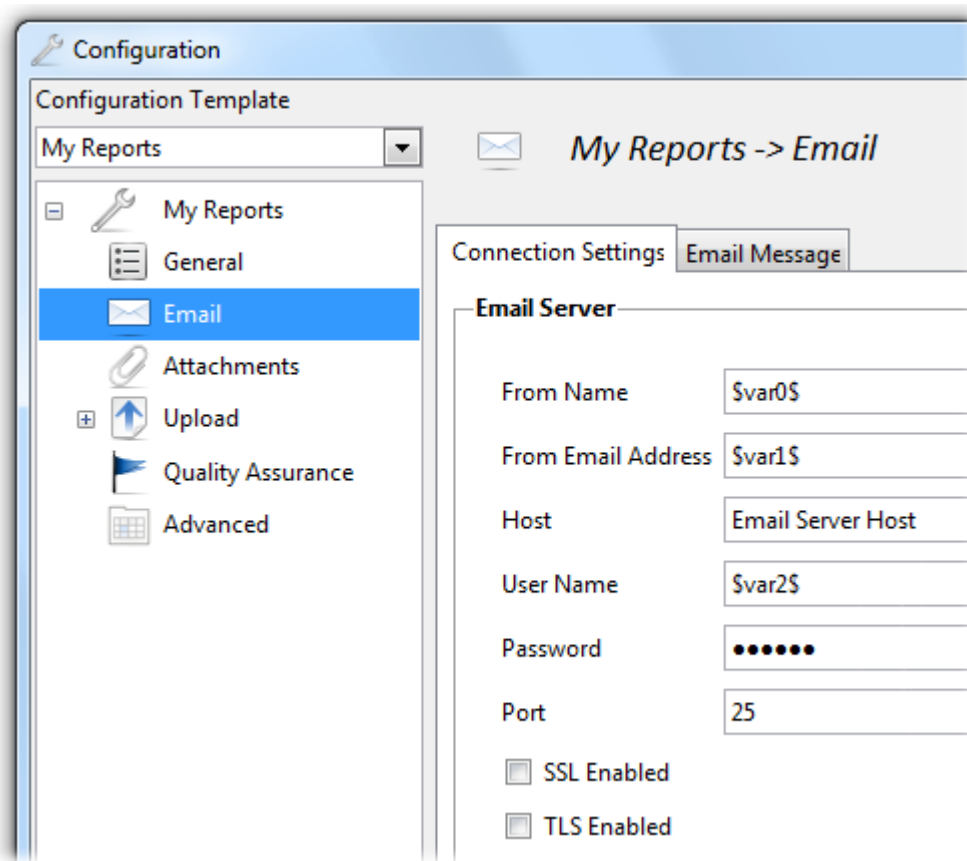
When sending the reports, the dynamic variables *$var0$, $var1,* etc. will be appropriately evaluated with the configuration settings for either *payroll@yourcompany.com* or *finance@yourcompany.com.* For more details about *Variables* please check *Chapter 5, Variables* .

3.3.3. Email Each Report to One Recipient

The simplest email distribution scenario is when sending each of the generated reports to one different recipient.

By default the *To* address is configured with the value of the *$burst_token$* variable. If the burst tokens are of type email address, for example by using tokens such as *{clyde.grew@northridgehealth.org}, DocumentBurster*™ will send the output report to the corresponding email address, in this case the *clyde.grew@northridgehealth.org* email address.

This is how the existing sample report `samples/Payslips.pdf` is configured to work.

{clyde.grew@northridgehealth.org}

Northridge Pharmaceuticals
7649F Diamond Hts Blvd
San Francisco
(415) 872-9214

STATEMENT OF MONTHLY INCOME

Employee Name	Clyde Grew

using configuration

📋 *My Reports -> General*	✉ *My Reports -> Email*

| General Settings | | Connection Settings | Email Message |

┌─ General Settings ──────────────┐   ┌─ Default Email Message ──────────┐

| Burst File Name | $burst_token$.pdf | | To | $burst_token$ |

generates and emails to the
same email address

📄 clyde.grew@northridgehealth.org

The *burst token* is *clyde.grew@northridgehealth.org* so the output file name will be `clyde.grew@northridgehealth.org.pdf` and will be emailed as an attachment to the *clyde.grew@northridgehealth.org* email address.

3.3.4. Email Each Report to Multiple Recipients

Another scenario is to distribute each output report to a list of people (or groups of people). It is also easy to configure *DocumentBurster™* to CC and BCC the generated reports.

In addition, it is possible to use dynamic variables when configuring the email destinations for the output reports. For example, it is possible to configure *DocumentBurster*™ to distribute emails *TO $var0$, CC* to *$var1$* and *BCC* to *$var2$.*

At run-time the variables will be expanded with values from the report which is being distributed, for example the variable values might be evaluated to

- *$var0$ (TO)-* emma.w@company.com;george.c@company.com

- *$var1$ (CC)-* accounting@company.com

- and *$var2$ (BCC)-* finance@northridgehealth.com.

> **Important**
>
> Multiple email addresses should be separated by either semicolon (;) or comma (,).

3.3.5. Text Email Messages

DocumentBurster™ supports sending of personalized email messages which have the corresponding burst report attached to the email.

In *DocumentBurster™* main window select **Actions** , **Configure** , **Email** , **Email Message**
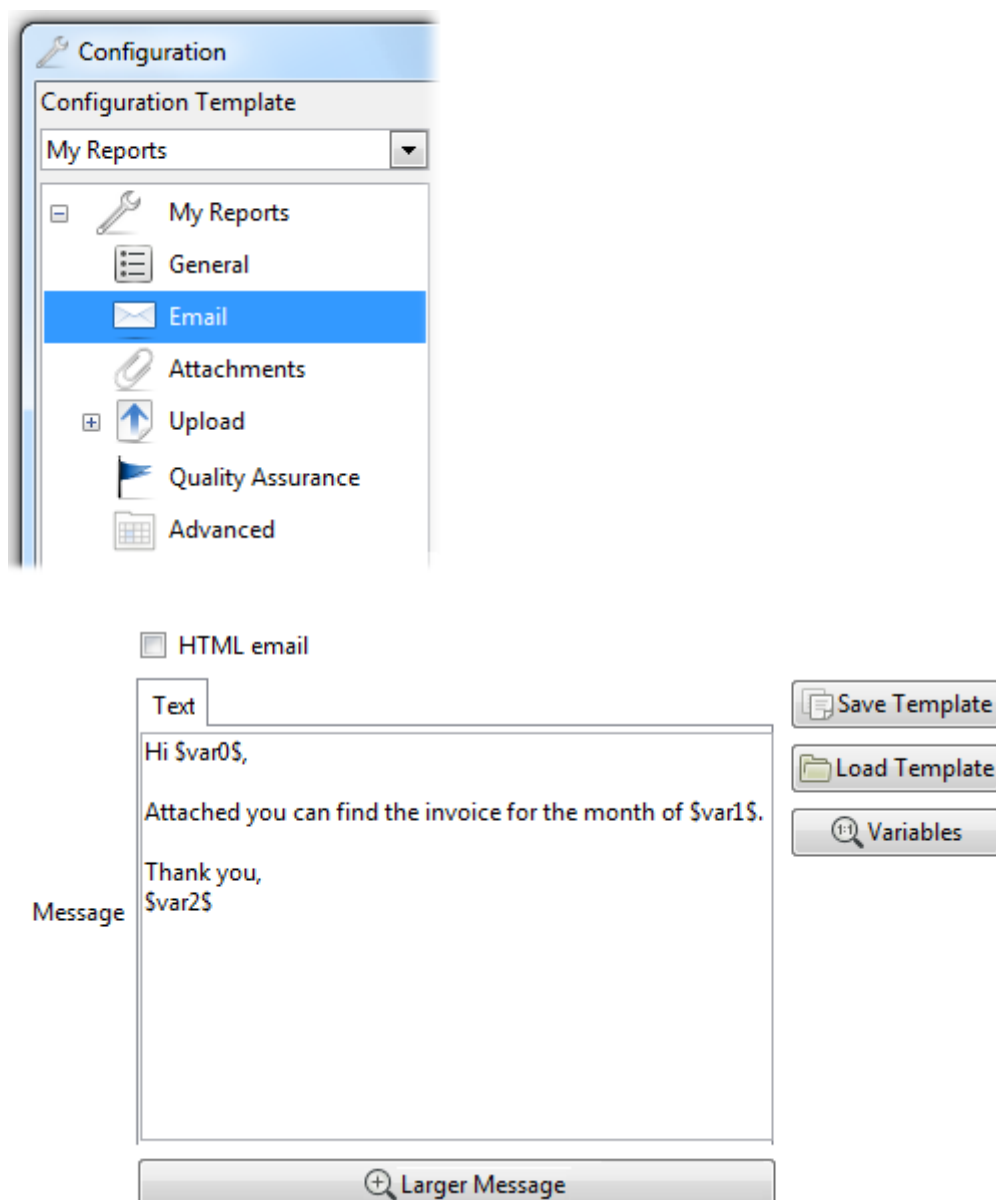
Using variables, the subject and the text of the email messages can be dynamically configured and customized for each individual recipient.

Example - In the previous screenshot, when each individual report is being distributed, *$var0$, $var1$* and *$var2$* variables will be replaced with values fetched from the burst report such as *John, July* and *Michelle.*

Following is the message which is sent when the variables are expanded with the values *John, July* and *Michelle*

Hi John,

Attached you can find the invoice for the
month of July.

Thank you,
Michelle

ℹ️ Note

In order to avoid message retyping, using the *Save Template* and *Load Template*
buttons, it is possible to save/load email message templates from/to external text
files.

3.3.6. HTML Email Messages

DocumentBurster™ can be configured to send rich HTML formatted email messages in order
to add color, images, headings, bulleted lists, emphasized text, underline key points, or to make
some of the words bold.

Configuration

Select the *HTML email* checkbox and define the HTML message with valid HTML code containing
the message which needs to be distributed.
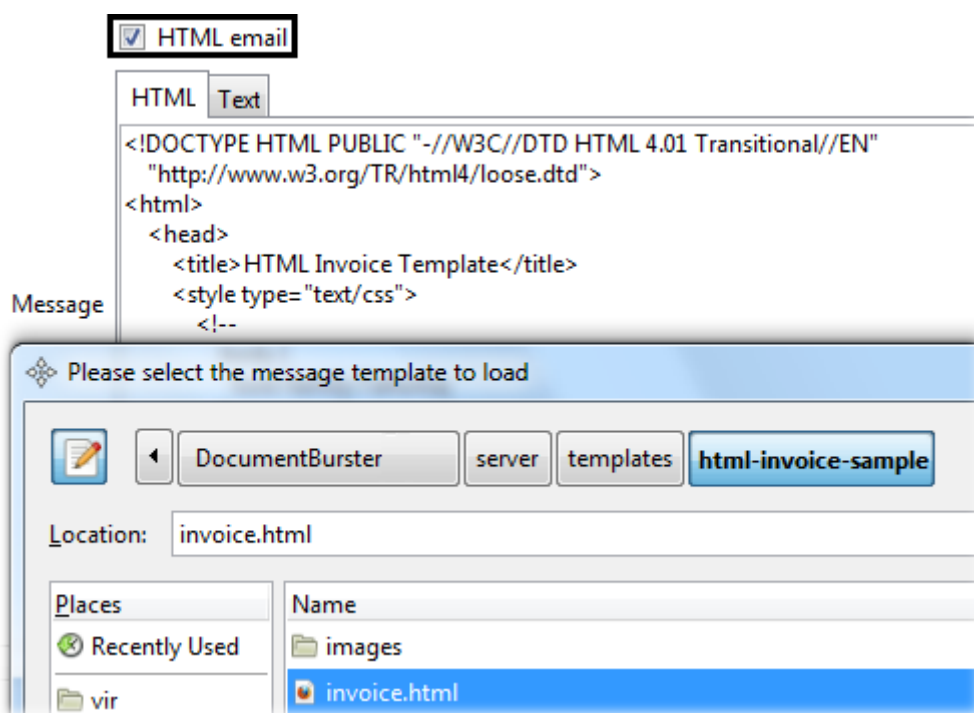
Provide Plain Text Message Alternative

When you configure to send HTML emails it is a good practice to provide an alternative plain text message for HTML unaware email clients (such as text-based email clients).

Personalize HTML Messages Using Variables

It is possible to use variables to personalize the content of the HTML emails for each individual recipient. For more details about variables please read *Chapter 5, Variables*

Image Paths

DocumentBurster™ resolves all image paths used in the HTML code starting from `./templates` parent directory.

For instance, the image `logo.png` is defined in the `invoice.html` having the relative path `src="html-basic-example/images/logo.png"`, starting from the `./templates` parent directory.

3.3.6.1. Basic HTML Sample - `invoice.html`

DocumentBurster™ comes with a sample HTML email template located in `templates/html-basic-example` folder. The sample template is called `invoice.html` and contains a good looking invoice to demonstrate the capabilities of HTML emails.

The sample HTML email template has a complex enough layout for giving an idea of what things can be achieved when sending HTML formatted emails (i.e. colors, images, bold text, etc.).

This is how the sample HTML invoice looks on Microsoft Outlook email client.

INVOICE

Northridge Pharmaceuticals
finance@northridgehealth.org

Invoice # 279
Created on 2008-10-09

Customer Details
Name: Alpha Electric
Email: accounting@alphaelectric.com.au
Payment Type: MasterCard

Description	Qty	Unit Price	Amount
Nebulizer System	10	$100.00	$1000.00
		Total	**$1000.00**

3.3.7. Beautiful Responsive HTML Emails

Mobile, WebMail and Desktop Trends

We tracked nearly 1 billion emails every month throughout 2015.

In the second half of 2015, opens made on mobile devices surged, going from 49% in June to 54% in November—a 10% increase. This matches trends we've seen in prior years where consumers are more likely to rely on portable devices. Webmail and desktop opens have also steadily declined throughout 2015, each dropping 13% since January.

https://litmus.com/blog/top-10-most-popular-email-clients-of-2015

Responsive Email Templates

Designing responsive HTML emails can be hard. *DocumentBurster*™ makes it easy.

DocumentBurster™ comes with **Foundation for Emails** which is a simple framework to quickly create responsive HTML emails that work on any device and any client.

http://foundation.zurb.com/emails.html

There are four responsive email templates available in `./templates/html-mobile-responsive-emails/templates/base`

All four email templates have been tested across 40+ email clients and devices.

1. Basic - View Demo - *https://litmus.com/pub/85a1b19*

This template is perfect for sending a basic but nice looking responsive email.

2. Hero - View Demo - *https://litmus.com/pub/6d34a4c*
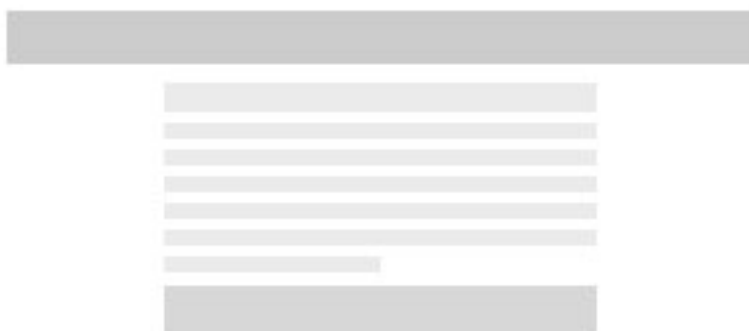
Want to include a snazzy hero image in your responsive email? This template is for you!

3. Sidebar - View Demo - *https://litmus.com/checklist/public/f6f3c9d*

This template includes a sidebar area for a list of links, perfect for linking to additional content.

4. Sidebar Hero - View Demo - *https://litmus.com/checklist/public/c00b7d3*

Want a sidebar and a hero image? Let's go crazy! This template combines the Sidebar and Hero templates.

Resources

- Foundation for Emails Documentation - *http://foundation.zurb.com/emails.html*

- Online tool to easily write your your email in markdown which is then converted automatically into a fully responsive email - *http://cakedown.alexandredeschamps.ca*

3.4. Attachments

Out of the box *DocumentBurster*™ attaches to each email message the file which is extracted for the corresponding burst token. This is the most common scenario and it is supported using the default program configuration.

Sometimes a different situation might be required

- Send emails without any attachment

- Send emails with two or more files attached (separate files or a single archive/zip file containing all the files together)

- Distribute other document formats (e.g. Word, XML, etc.) beside the PDF and Excel formats which are supported out of the box

Use case example

The requirement is to send electronic invoices via email. The invoice is formed by a PDF which is the graphical form of the invoice, and an XML file which contains the details of the invoice.

By some countries law, it is required to send both files in order to consider this as a valid invoice.

The above requirement can be achieved by defining both files as an attachment for the output emails

- The extracted PDF invoice

- The corresponding XML file

Furthermore, the files can be archived and sent together as a single zip file.

3.4.1. Configure Attachments

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Attachments**
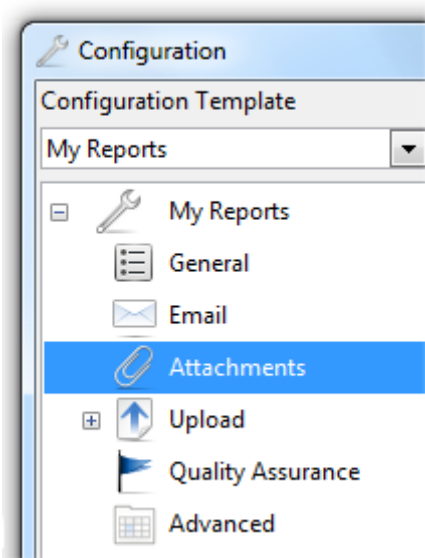
- By default the software is attaching *$extracted_file_path$.*

- Attachments can be added, removed and edited using the buttons with the corresponding names *Add,Remove* (or *Clear* to remove all) and *Edit.*

- *Variables* can be used when defining attachments. For more details about variables please read *Chapter 5, Variables* .

- The files are attached in the selection order. The order can be changed using *Up* and *Down* button commands.

Archive Attachments

- *Archive all attachments together* - If selected, *DocumentBurster*™ will archive (zip) all the attachments together. If configured to distribute reports, *DocumentBurster*™ will deliver to the relevant recipients the archived (zip) file containing all the corresponding files. Default value is unchecked.

- *Archive File Name* – Name for the archive file. Default value is *reports-$burst_token$.zip.*

3.5. Upload Reports

DocumentBurster™ software can upload business reports through most of the existing network protocols including FTP, Windows File Share, FTPS, SFTP/SCP/SSH, TFTP, HTTP, HTTPs and WebDAV. WebDAV is an extension of HTTP protocol and *DocumentBurster*™ can be used to upload reports to any web server which has WebDAV support.

3.5.1. *cURL* Integration

DocumentBurster™ closely integrates with *cURL* , a Swiss-army knife for doing data transfer. Through *cURL, DocumentBurster*™ can distribute reports via HTTP or FTP with or without authentication, it works over SSL, and it works without interaction. Actually *cURL* (and thus *DocumentBurster*™) supports distributing files and data to a various range of common Internet protocols, currently including HTTP, HTTPS, FTP, FTPS, SCP, SFTP, TFTP, LDAP, LDAPS, DICT, TELNET, FILE, IMAP, POP3, SMTP and RTSP.

cURL - http://curl.haxx.se/

Cross platform

cURL is portable and works on many platforms, including Windows, Linux, Mac OS X, MS-DOS and more.

On Windows, *DocumentBurster*™ package distribution is bundling together a recent version of *cURL.* So, if your organization is running *DocumentBurster*™ under Windows, there is nothing more to download or install in regards with *cURL.*

For other UNIX like systems, such as Linux and Mac OS X, the appropriate *cURL* binaries distribution should be properly downloaded and installed. In addition, the *cURL* groovy scripts which are bundled together with *DocumentBurster*™ are written for Windows usage and should support small adjustments to be made ready for usage under Linux/UNIX.

Further cURL resources

cURL is a tool for getting or sending files using URL syntax. The URL syntax is protocol-dependent. Along with the URL for the required protocol, *cURL* can take some additional options in the command line.

For complete *cURL* documentation you can follow

- *cURL Manual* [http://curl.haxx.se/docs/manual.html]

- *cURL Man Page* [http://curl.haxx.se/docs/manpage.html]

- *cURL Frequently Asked Questions* [http://curl.haxx.se/docs/faq.html]

3.5.2. FTP

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Upload** , **FTP**
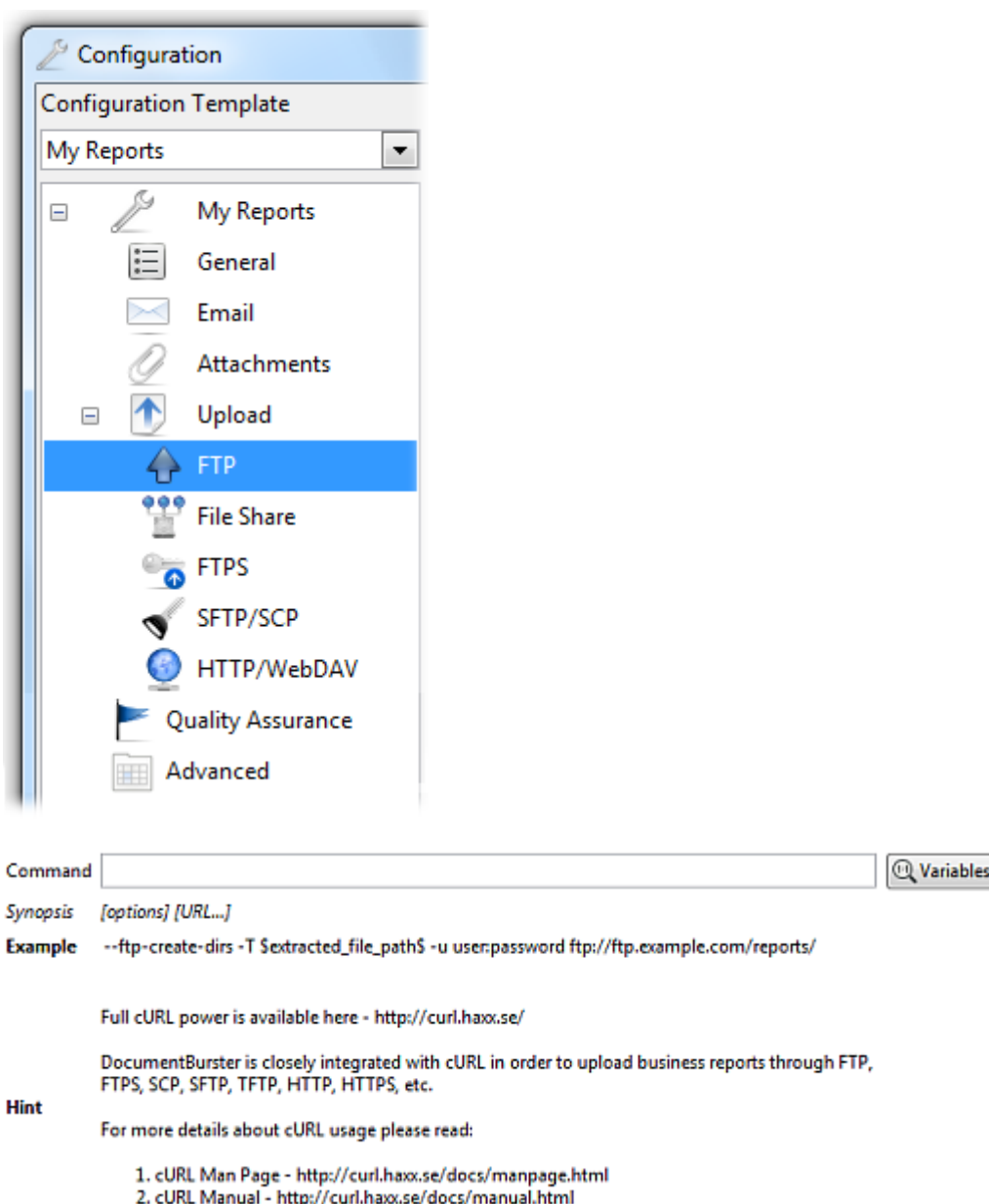
Command - Command which *DocumentBurster*™ will execute in order to upload each of the output reports. It is possible to use variables in order to dynamically generate the command at run-time.

The example provided with the software is a typical cURL command for uploading reports using the FTP protocol.

- *--ftp-create-dirs* - (FTP/SFTP) When an FTP or SFTP URL/operation uses a path that doesn't currently exist on the server, the standard behavior is to fail. Using this option, the software will instead attempt to create missing directories.

- *-T, --upload-file* - This transfers the specified local file to the remote host.

- *$extracted_file_path$* - Variable which is expanded with the path to the last extracted file.

- *-u, --user <user:password>* - Specify the user name and password to use for server authentication. User variables can be used in order to dynamically configure user and password.

- *example.com* - Replace this with the FTP host where the reports should be uploaded. User variables can be used in order to dynamically configure the FTP host.

- */reports/* - Replace this with the folder on the server where the reports should be uploaded. User variables can be used in order to dynamically configure the remote folder.

3.5.3. File Share

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Upload** , **File Share**

Command - Command which *DocumentBurster*™ will execute in order to upload each of the output reports. It is possible to use variables in order to dynamically generate the command at run-time.

The example provided with the software is a typical cURL command for uploading reports to file share.

- *file://* - *File URI scheme* [http://en.wikipedia.org/wiki/File_URI_scheme]

- *%20* - ASCII character code for space (URL Encoding).

- *$extracted_file_path$* - Variable which is expanded with the path to the last extracted file.

3.5.4. FTPS

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Upload** , **FTPS**
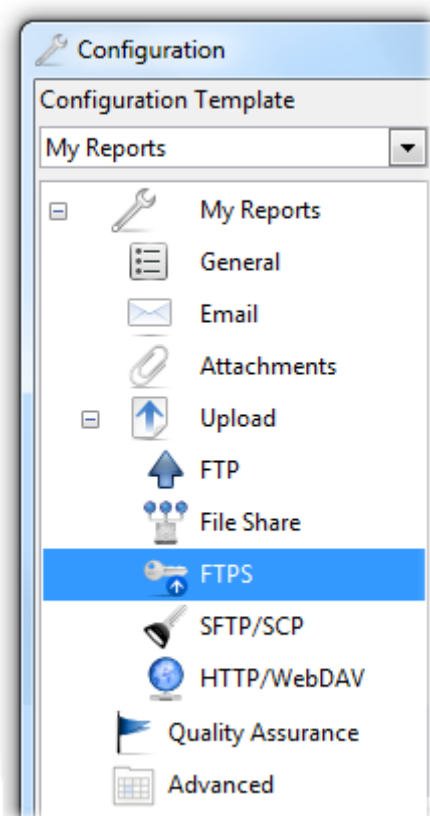
Command		Variables
Synopsis	[options] [URL...]	
Example	--ssl -T $extracted_file_path$ -u user:password ftp://ftp.example.com/reports/	
Hint	FTPS (also known as FTP-ES, FTP-SSL and FTP Secure) is an extension to the commonly used File Transfer Protocol (FTP) that adds support for the Transport Layer Security (TLS) and the Secure Sockets Layer (SSL) cryptographic protocols. FTPS should not be confused with the SSH File Transfer Protocol (SFTP), an incompatible secure file transfer subsystem for the Secure Shell (SSH) protocol. It is also different from Secure FTP, the practice of tunneling FTP through an SSH connection. Source: http://en.wikipedia.org/wiki/FTPS For more details about cURL FTPS usage please read: 1. cURL Man Page - http://curl.haxx.se/docs/manpage.html 2. cURL Manual - http://curl.haxx.se/docs/manual.html	

Command - Command which *DocumentBurster*™ will execute in order to upload each of the output reports. It is possible to use variables in order to dynamically generate the command at run-time.

The example provided with the software is a typical cURL command for uploading reports to a server which has FTPS support.

- *--ssl* - Try to use SSL/TLS for the connection. Reverts to a non-secure connection if the server doesn't support SSL/TLS. See also `--ftp-ssl-control` and `--ssl-reqd` for different levels of encryption required.

- *$extracted_file_path$* - Variable which is expanded with the path to the last extracted file.

3.5.5. SFTP/SSH/SCP

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Upload** , **SFTP/SCP**

Command - Command which *DocumentBurster™* will execute in order to upload each of the output reports. It is possible to use variables in order to dynamically generate the command at run-time.

The example provided with the software is a typical cURL command for uploading reports to a server which has SFTP support.

- *sftp://* - Specifies that SFTP protocol should be used.

- *$extracted_file_path$* - Variable which is expanded with the path to the last extracted file.

3.5.6. HTTP/WebDAV

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Upload** , **HTTP/WebDAV**

Command - Command which *DocumentBurster*™ will execute in order to upload each of the output reports. It is possible to use variables in order to dynamically generate the command at run-time.
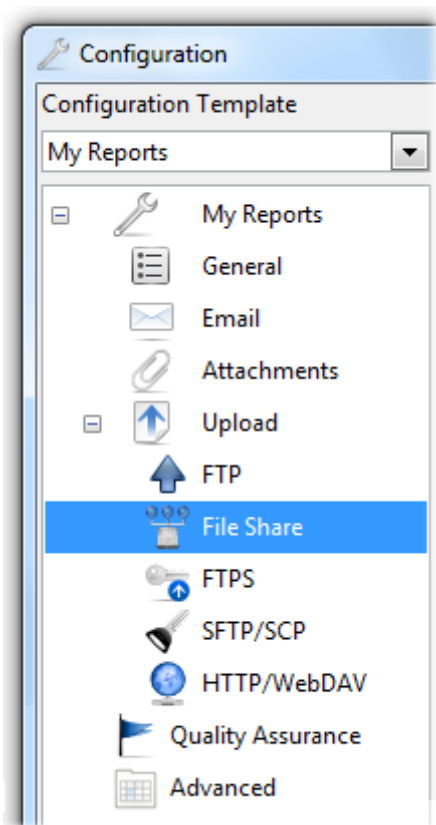
The example provided with the software is a typical cURL command for uploading reports to a web server. The web server should have HTTP upload enabled, otherwise uploads will not be allowed.

Microsoft SharePoint is a common report distribution use case. The command to upload to a *SharePoint* portal should be similar with the provided *SharePoint* example.

3.6. Send SMS Messages

People use *DocumentBurster*™ to email invoices, payslips or other financial reports to customers and employees. In addition to an email your customers can also get an SMS message like:

Dear
Customer Name

,

Just wanted to let you know that we've sent the June invoice by
email to
customer@emailaddress.com

.

Thank You for your business!

Your Name

,
Your Company Name

With an average SMS open rate of 99% you can see why sending SMS messages to your customers is useful.

3.6.1. Twilio

DocumentBurster™ can be configured to send SMS text messages through Twilio.

Twilio (pronounced TWILL-e-o) is a cloud communications (IaaS) company based in San Francisco, California. Twilio allows sending text messages using its services. Twilio's services are billed based on usage.

- *Twilio Home Page* [https://www.twilio.com]

- *Twilio SMS Pricing* [https://www.twilio.com/sms/pricing]
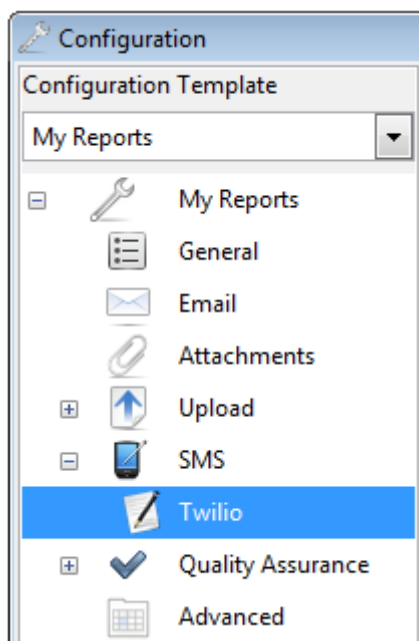
Configuration

First step is to register an account with Twilio. It's fast and free to get started. You can use your existing Twilio account if you already have one. Follow this link to register your new Twilio account.

https://www.twilio.com/try-twilio

Twilio requires two credentials for sending SMS messages. The *Account SID* , which acts as a username, and the *Auth Token* which acts as a password. Follow this link to learn more about your Twilio *Account SID* and *Auth Token* .

What is the Auth Token, and how can I change it? [https://www.twilio.com/help/faq/twilio-basics/what-is-the-auth-token-and-how-can-i-change-it]

3.6.2. Text

DocumentBurster™ supports sending of personalized SMS text messages to your customers.

In *DocumentBurster*™ main window select **Actions** , **Configure** , **SMS** , **Message**

From Number		Variables
To Number		Variables
Text	Dear $var0$, Just wanted to let you know that we've sent the June invoice to $var1$ email address. Thank you for your business! Your Name, Your Company Name	Variables

Using variables the *From Number* , *To Number* and the text of the SMS messages can be customized for each individual recipient.

- *From Number* – Phone number used for sending the SMS messages.

  This number should be a *Twilio SMS-enabled phone number* . Follow this link for more details

  Can I use my Twilio number for SMS? [https://www.twilio.com/help/faq/sms/can-i-use-my-twilio-number-for-sms]

- *To Number* – Phone number where the SMS message will be sent. Using a variable you'll personalize (provide) the mobile number for each of your recipients (customers).

- *Text* – The SMS text message to be sent. Using variables you'll send a personalized text message for each of your recipients (customers).

Configuration Templates

If required, *DocumentBurster*™ has support to use a different set of configuration settings for each separate report type. For example, using this capability, it is possible to use a different email subject, text or burst file name for *invoices* report type and a different email subject, text or burst file name when processing *payslips* report type.

By default, if no custom configuration file is provided, *DocumentBurster*™ will process all the reports using the default configuration settings which are saved in `./config/burst/settings.xml` configuration file. This should be fine in most of the situations, however there are cases when it is required to process a different report type using its own set of configuration settings.

Use case example

The requirement is to burst and email to customers several different types of financial documents, specifically

- invoices

- statements

- dunning letters

Each of the above report types should be delivered to customers using an email subject and text which is specific to the report type which is being distributed (i.e. invoices, statements or dunning letters).

The requirement can be achieved by defining

- *invoices* email subject and text in a configuration file such as `./config/burst/invoices.xml`

- *statements* email subject and text in a different `./config/burst/statements.xml`

- and *dunning letters* email subject and text in its own configuration file `./config/burst/dunning-letters.xml`.

DocumentBurster™ will process and email each different report type by using its own distinct set of configuration settings.

4.1. Process PDF Reports Using a Custom Configuration File

While bursting a PDF report, *DocumentBurster*™ checks the first page of the report for a custom defined configuration file by looking for a pattern like

<config>path-to-the-custom-settings-file.xml</config>

For example, in order to process *invoices* report using a custom configuration file, the first page of the input `invoices.pdf` report should contain something similar with

<config>./config/burst/invoices.xml</config>

> **Note**
>
> The same result can be achieved by using the shorter (while being less expressive) pattern
>
> *<c>path-to-the-custom-settings.xml</c>,*
>
> for example *<c>./config/burst/invoices.xml</c>*

4.2. Process *Excel* Reports Using a Custom Configuration File

While bursting an *Excel* report, *DocumentBurster*™ checks for a custom configuration file defined in *configFile* column from *burst* metadata sheet. If no custom configuration file is found then *DocumentBurster*™ will burst the report using the default `./config/burst/settings.xml` configuration file.

Following is how an *Excel* reports should be configured in order to achieve the above (i.e. invoices, statements and dunning letters) requirement.

In *burst* sheet, `invoices.xls` *Excel* report should have the custom *configFile* defined like that

configFile
./config/burst/invoices.xml

In *burst* sheet, `statements.xls` *Excel* report should have the custom *configFile* defined like that

configFile
./config/burst/statements.xml

In *burst* sheet, `dunning-letters.xls` *Excel* report should have the custom *configFile* defined like that

configFile
./config/burst/dunning-letters.xml

4.3. Add, Edit and Delete Configuration Templates

In *DocumentBurster*™ main window select **Actions** , **Configuration Templates**
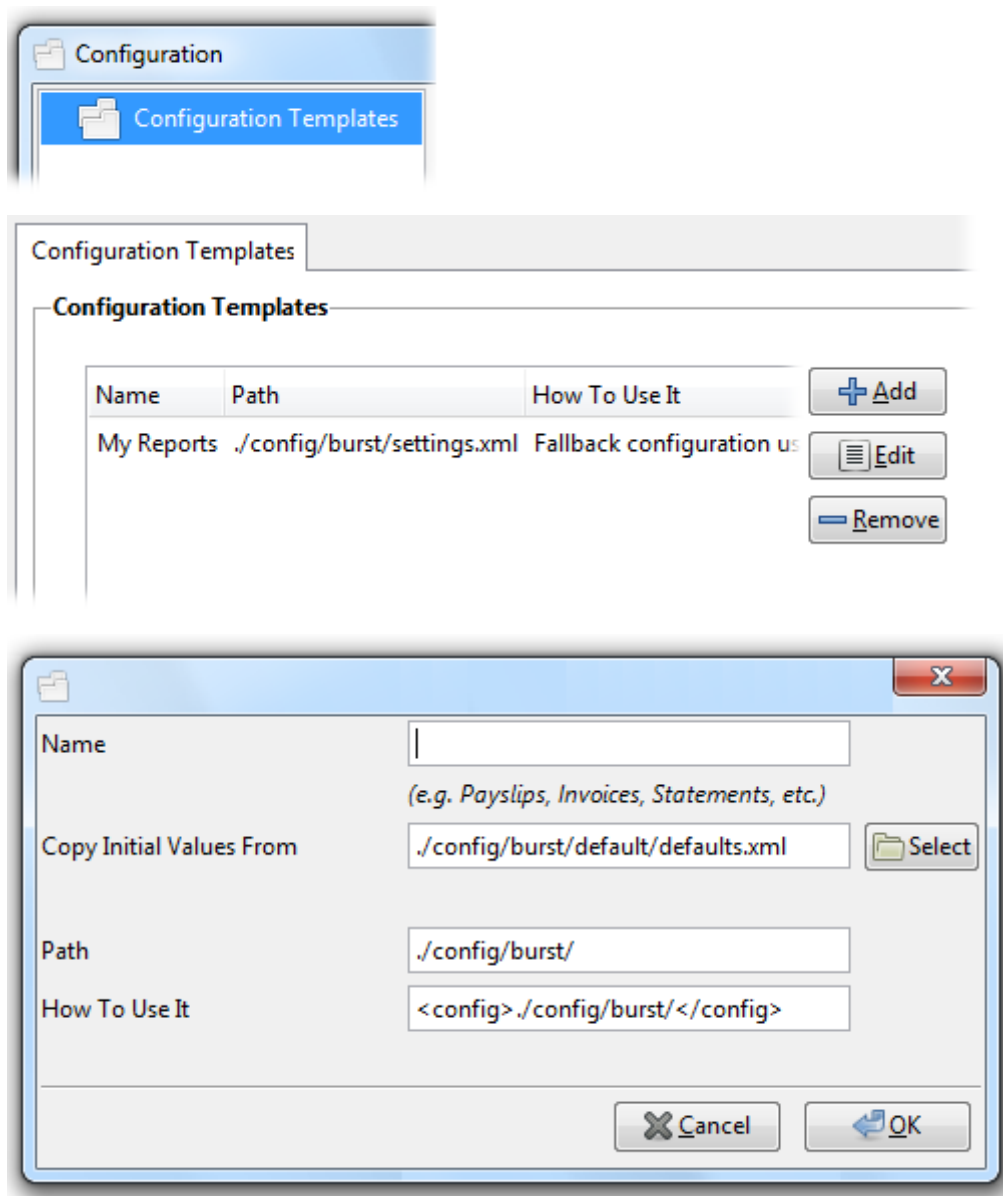
- *Add* - Create a new configuration template.

- *Edit* - Modify an existing configuration template.

- *Remove* - Delete an existing configuration template.

Each configuration template is saved in a different configuration file. For example, *Invoices* configuration template might be saved in a `./config/burst/invoices.xml` file while *Statements* configuration template might be saved in a `./config/burst/statements.xml` file.

4.3.1. Create Similar Configuration Templates

Copy Initial Values From - When creating a new configuration template it is required to provide the path to an existing and valid configuration file from which the initial configuration values will

be copied. Once the new configuration template is created you might modify only the few settings which should be different between configuration templates (e.g. email subject, email message, etc.). Most of the other settings will usually remain the same (e.g. email server connection settings) between different configuration templates.

Default Value - `./config/burst/default/defaults.xml`

Once the configuration templates are created they will become available to be used throughout the *DocumentBurster*™ GUI.
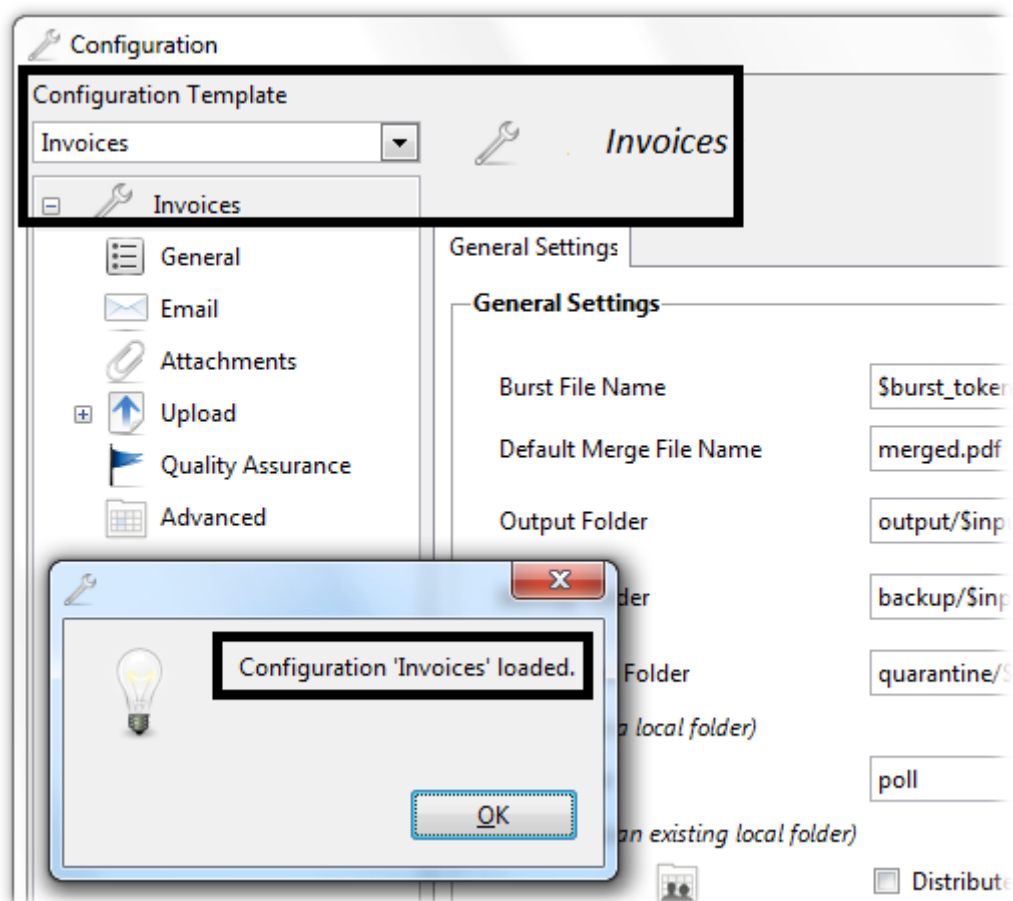
Variables

DocumentBurster™ variables are pieces of information from the input report, evaluated and processed individually for each output report.

Variables can be used to define dynamic configurations as well as data to be included in the delivery of documents. For example, using an email message template together with variables it is possible to define a personalized email subject/message for each individual recipient.

Variables can be used to define custom dynamic values for the following configurations

- *Burst File Name*

- *Output Folder*

- *Backup Folder*

- *Quarantine Folder*

- *Upload (FTP, File Share, etc.) commands and URLs* can be dynamically generated

- Email *To, CC and BCC* fields can be dynamically generated

- *Email subject and message* text can be personalized using variables

- Email *connection settings* can be customized using variables. *From Name, From Email Address, Host, User Name, User Password and Port* settings are all configurable using variables.

Using variables, the values of the above configurations can be dynamically populated at run-time with information coming from the report which is being burst.

5.1. Example - Configure an Unique Output Folder

While it is possible to define static values for the output folders, it is not advisable. In order to avoid the output reports to get overridden from one burst session to another, with the help of variables, it is better to define dynamic *time-stamp based* output folder configurations.

Following are few situations in which variables will help

- The same report is being burst at different times. Bursting the same report to the same statically defined output folders will override the files generated during previous burst sessions.

- Few different reports are using the same burst tokens (for example the email address of the same client). Having a common output folder will result in getting the generated reports to be overridden between different burst sessions. This is happening because the same burst token is found in different input reports.

Using variables, with unique *time-stamp based* values generated at run-time, it is possible to overcome the above described problems by defining unique output folder names per each different burst session.

Output Folder, Backup Folder and Quarantine Folder configurations are all defined using the same pattern *$input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$*

When bursting the input sample document `Payslips.pdf,` by default, the output files are being generated in a folder similar with `Payslips.pdf/2010.10.28_19.13.13` - *$input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$.*
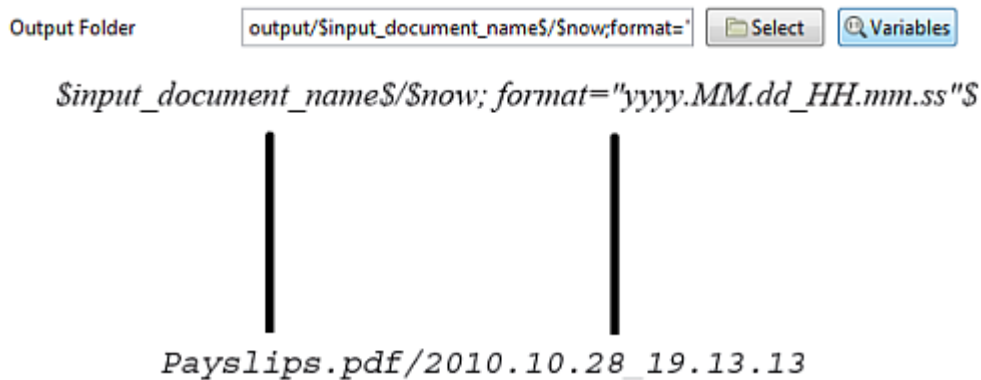
Built-In vs. User-Defined Variables

DocumentBurster™ has two types of variables

- Built-In Variables

- User-Defined Variables

5.2. Built-In Variables

Built-in variables can be the name of the report to burst, the date (in various formats) when the bursting is happening or the current burst token.

Following built-in variables are available to be used within *DocumentBurster*™

- *$input_document_name$* - the file name of the input report

- *$input_document_extension$* - the file extension of the input report. It will be *pdf* for PDF input reports, *xls* for *Excel* versions prior to 2007 and *xlsx* for *Excel 2007* and *Excel 2010*.

- *$burst_token$* - the burst token which is used for bursting the current file

- *$burst_index$* - the index of the burst file. For example, a file which will be burst fourth will have the value 4

- *$output_folder$* - the output folder where the last file was extracted

- *$extracted_file_path$* - the path to the last extracted file

- *$now; format="yyyy.MM.dd_HH.mm.ss"$* - the current date and time displayed in the specified format. Custom date formats can be specified also, for example it is possible to display the full date/time or display one or a combination of year, month, week, day, hour, minute, second. *yyyy.MM.dd_HH.mm.ss* is the format which is provided with the software.

> **Note**
>
> Windows doesn't allow to use *the character :* when defining folder and file names.

Full date format documentation is available here [http://download.oracle.com/javase/1.4.2/docs/api/java/text/SimpleDateFormat.html]

- *$now_default_date$* - shortcut to the default date format in the computer's locale settings. U.S. Locale example would be Jun 30, 2009

- *now_short_date* - shortcut to the short date format in the computer's locale settings. U.S. Locale example would be 6/30/09

- *now_medium_date* - shortcut to the medium date format in the computer's locale settings. U.S. Locale example would be Jun 30, 2009

- *now_long_date* - shortcut to the long date format in the computer's locale settings. U.S. Locale example would be June 30, 2009

- *now_full_date* - shortcut to the full date format in the computer's locale settings. U.S. Locale example would be Tuesday, June 30, 2009

Using built-in variables it is possible to build an advanced foldering and archiving solution for the output reports.

Following different foldering options are possible. Combinations of the following are also possible

- Generate one different output folder per each input report

- Generate one different output folder per each different burst token

- Date related options - generate one output folder per year, financial quarter, month, week in month, day in week and up to the level of hours, minutes and seconds.

5.2.1. Sample - `Payslips.pdf`

DocumentBurster™ is coming with the following default settings

Burst File Name - $burst_token$.$input_document_extension$

When bursting the `samples/Payslips.pdf` report following three files are being generated. The three email addresses are the burst tokens and `pdf` is the input document extension.
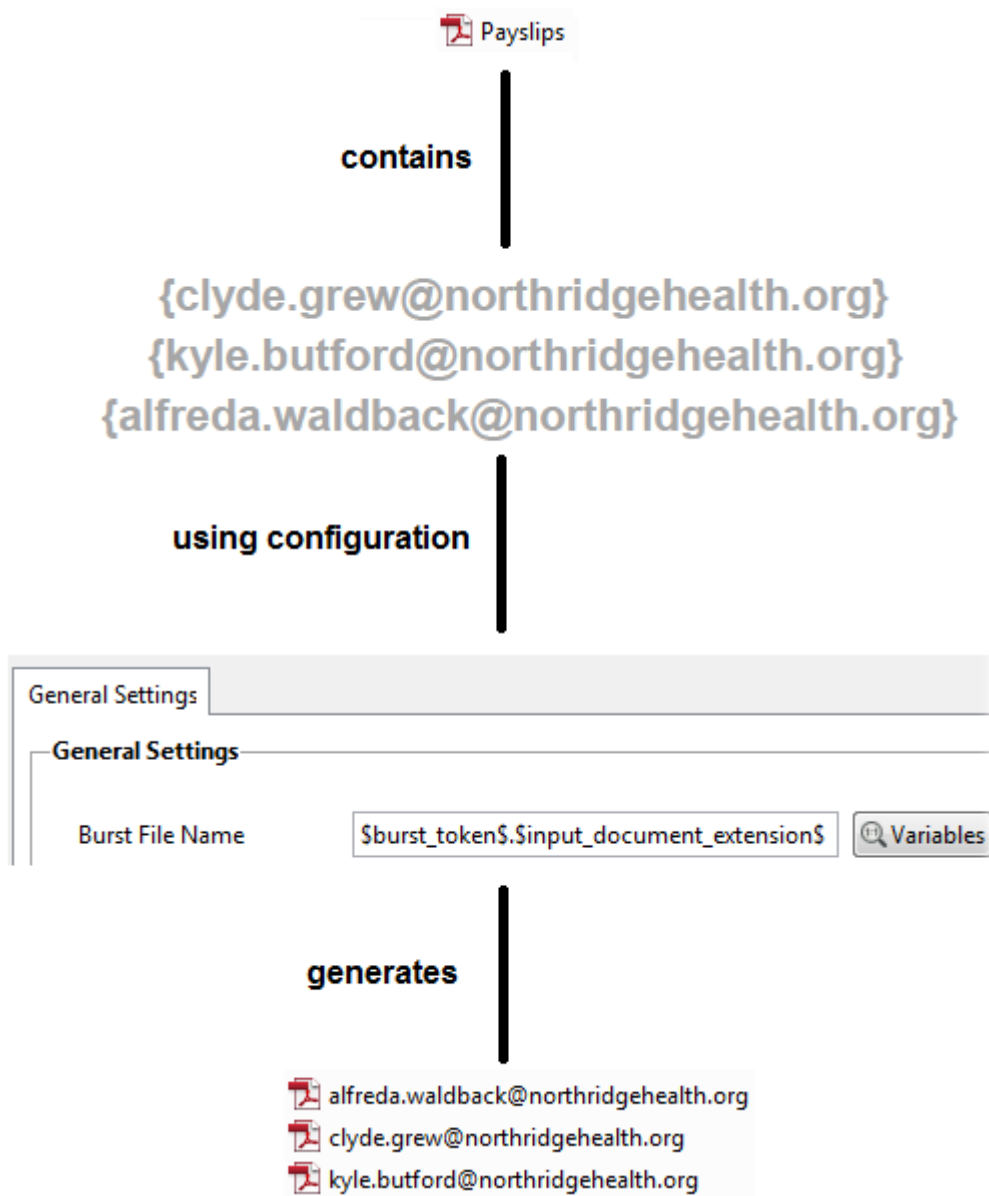
5.3. User-Defined Variables

User defined variables can be any text from the report which is being burst or distributed.

User variables might be used for sending emails with a personalized subject and a personalized message text or for generating dynamic file names and folder names for the output burst reports.

DocumentBurster™ has support for up to 10 (ten) user defined variables *$var0$, $var1$, $var2$, $var3$, $var4$, $var5$, $var6$, $var7$, $var8$* and *$var9$.* While the variable names are not impressive they are for sure handy to use.

The values for the user defined variables are being populated with text content from the report which is being burst. Usually the variables will have different values for each different *burst token* (or for each different recipient).

In order to populate the user defined variables with values, *DocumentBurster*™ engine is looking inside the report for patterns like the following

- *<0>* any text which should be assigned as a value to the first variable *</0>* or

- *<1>* any text which should be assigned as a value to the second variable *</1>*

DocumentBurster™ engine supports up to 10 (ten) different variables, so the last variable will look like *<9>* any text which should be assigned as a value to the 10th variable *</9>.*

User defined variables can be used to dynamically generate any of the following *Burst File Name, Output Folder, Backup Folder, Quarantine Folder, Upload(FTP, File Share, etc.) commands and URLs, Email To, CC and BCC fields, Email Subject, Email Message Text, From Name, From Email Address, Host, User Name, User Password and Email Server Port.*

5.3.1. Sample `Invoices-Oct.pdf` - Customizable Burst File Name

With the default settings, *DocumentBurster*™ is generating the output file names using the following configuration

Burst File Name - `$burst_token$.$input_document_extension$`

where *$burst_token$* is the system built-in variable used to burst the separate files and *$input_document_extension$* is the input file extension (i.e. `pdf, xls or xlsx).`

Requirement

For example, a requirement might be to generate the output file names *(Burst File Name)* using the following pattern

```
Customer name-Invoice number-Invoice date.pdf
```

The requirement can be achieved with the help of user defined variables. Please check `samples/Invoices-Oct.pdf` sample report to see that *Invoice number* field is configured as burst token and *Customer name* and *Invoice date* fields are mapped to *$var1$* and *$var0$* user variables.

INVOICE

Northridge Pharmaceuticals

7649F Diamond Hts Blvd
San Francisco, CA 91324
USA
(415) 872-9214

info@northridgehealth.org
http://www.northridgehealth.org

Invoice number	{0011}
Invoice date	<0>Oct 10, 2011</0>
Payment terms	Due on date specified
Due date	Oct 17, 2011

Client Details

<1>Alpha Electric</1>

795E Dragram
Tucson, AZ 85705
USA

<2>accounting@alphaelectric.biz</2>

Description	Quantity	Unit price	Amount
Nebulizer system	10	$100.00	$1000.00
		Total	$1000.00

Burst File Name will be defined as `$var1$-$burst_token$-$var0$.pdf`
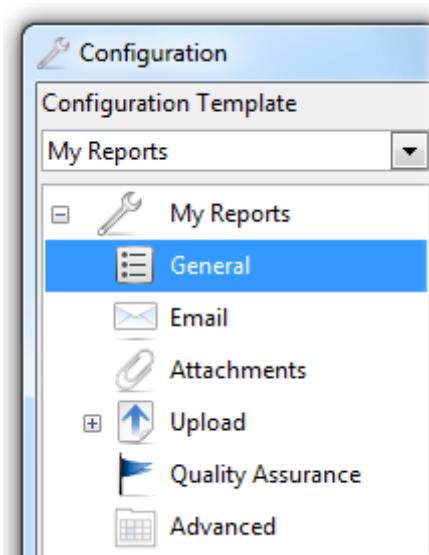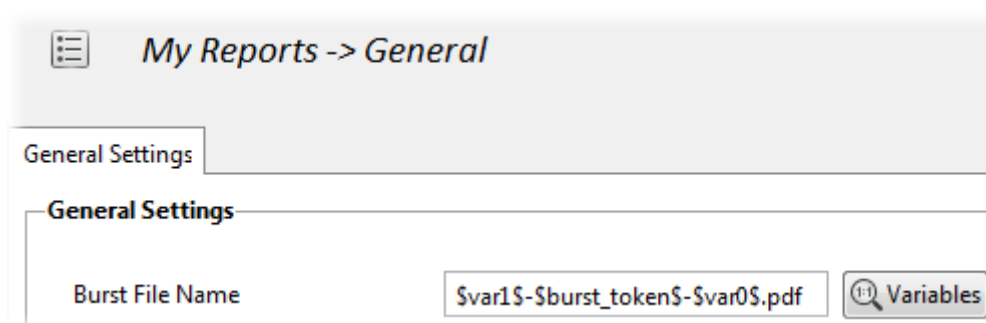
$burst token$, $var0$ and $var1$ variables will be populated at run-time with values fetched from each separate report.

- Variables are fetched at run-time from each separate invoice. *DocumentBurster*™ is looking for *<N>value</N>* patterns in each invoice, where *N* is from 0 to 9.

- In the above example the name of the generated file will be `Alpha Electric-0011-Oct 10, 2011.pdf`

Using the previous configuration, bursting `samples/Invoices-Oct.pdf` will generate the following four distinct files
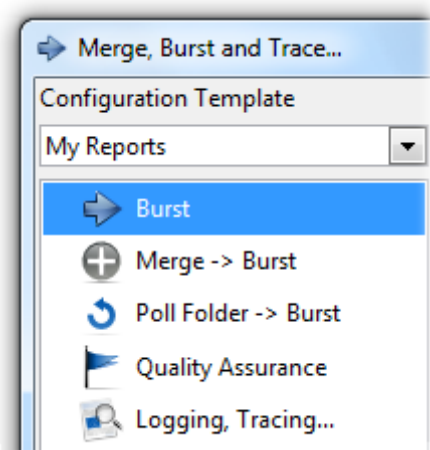
PDF/Excel File Path samples\Invoices-Oct.pdf 📁 Select

⇨ Burst   🔍 View Generated Reports

Distribute reports to Email, FTP ...

Delete reports once they are distributed

Quarantine reports which fail to be distributed

Are you sure you want to post another job?

Yes   No
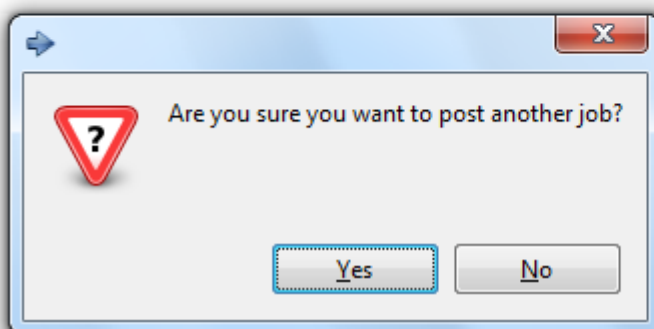
General Settings

General Settings

Burst File Name $var1$-$burst_token$-$var0$.pdf   🔍 Variables

📄 Alpha Electric-0011-Oct 10, 2011
📄 General Industries Co.-0012-Oct 13, 2011
📄 Goldstream Fuel-0013-Oct 15, 2011
📄 Red Valley Mining-0014-Oct 16, 2011

ℹ Note

Use a white font color for the start and the end tags of the variables, (e.g. *<0>* and
</0>) so that the visual appearance and the layout of the report will not be affected.

⭐ Important

Before going to production, it is advisable to practice the use of variables on few
sample reports. This is to avoid any unpleasant situation of sending wrong data
to clients or customers.

5.3.2. *Excel* User-Defined Variables

While the concept and the usage for the user defined variables are the same with the PDF reports, *Excel* user defined variables are defined like the following example

D	E		configFile
(*)burstTokens	userVariables		
Germany	<0>Alfreds Futterkiste</0>, <1>Berlin</1>		
USA	<0>John Steel</0>, <1>San Francisco</1>		

- If required, *Excel* user-defined variables can be declared in the *userVariables* column from *burst* metadata sheet

- Similarly with the PDF variables, *Excel* user-defined variables are enclosed in between <0>value</0>,<1>value</1> and so on.

- The value for *var0* user variable (associated with *Germany* burst token) is *Alfreds Futterkiste* and the value for *var1* is *Berlin.* The values for the *USA* burst token are the ones which are presented in the screenshot.

Automatic Polling for Incoming Reports

6.1. Watch a Folder for Incoming Reports

DocumentBurster™ can poll a configurable folder and automatically pick for processing all the reports which are dropped to this folder.

This functionality is useful when integrating with an external legacy system which can be configured to generate the reports to the polled folder, thus obtaining an automated system to generate, burst and distribute the reports.

In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Poll Folder -> Burst**
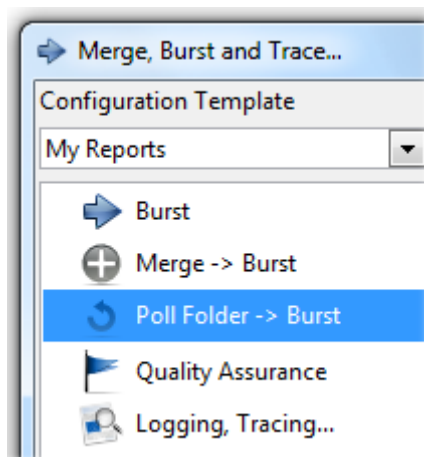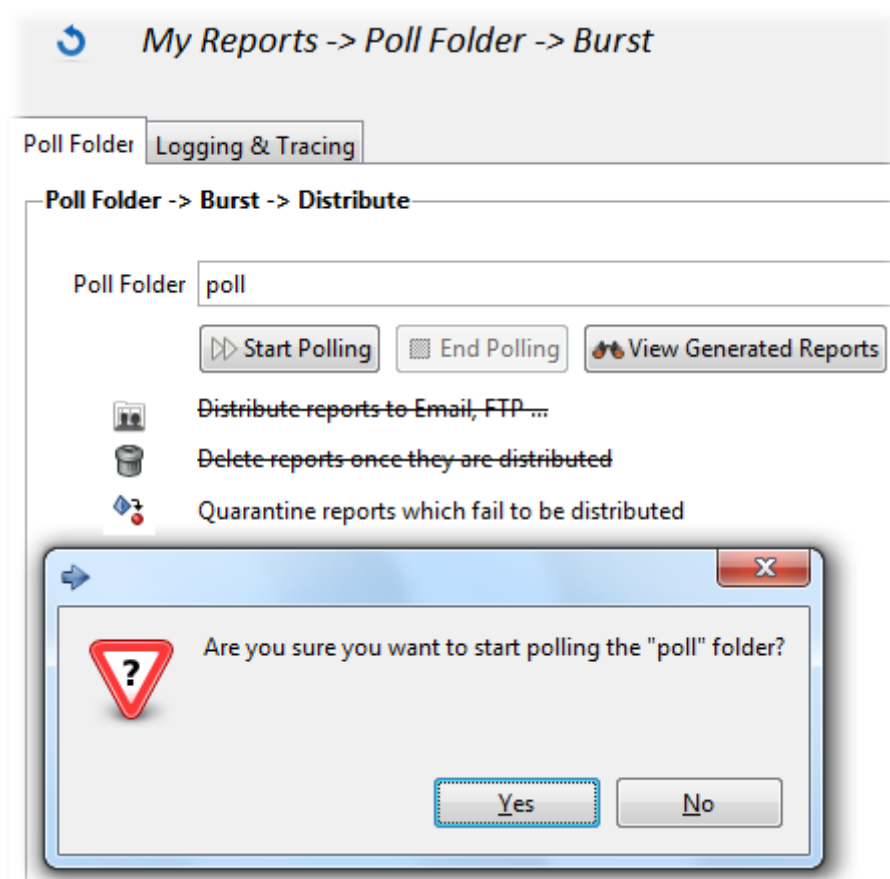
- *Start Polling* - Start watching the selected folder for incoming reports. Once the polling is started, *DocumentBurster*™ will automatically process all the reports which are dropped to this folder.

- *End Polling* - Stop watching/polling the folder for incoming reports.

- *View Generated Reports* - Browse the generated reports.

> **Note**
>
> The polling GUI presented in this chapter is not available in *DocumentBurster*™ *Server.* *DocumentBurster*™ *Server* will automatically start to check (poll) the `server/poll` folder once it is started.
>
> For more details about the additional features of *DocumentBurster*™ *Server* software please read *Chapter 9, DocumentBurster Server* .

Quality Assurance

When dealing with reports and financial documents it is important to have a good quality assurance mechanism.

I'm concerned with sending misdirected mass email.

This is a legitimate concern which people might have before deciding to implement an automated report delivery system. *DocumentBurster*™'s quality assurance mechanism is the tool intended to address exactly this concern, thus greatly reducing the risk and increasing the confidence of doing mass report distribution.

7.1. Email Tester

Before going "live" quality assurance should be used for testing that everything is configured as it should be.

DocumentBurster™ integrates a *Test Email Server* which sits in the system tray and does not deliver the received messages. The received messages can be quickly viewed and inspected. Imagine you're just about to email 1000 invoices to your customers. You'll want to test your messages before emailing? *Email Tester* will help you do just that.

The emails that are routed to the *Email Tester* will include the document(s) as a PDF attachment and the body of the email messages will be the same which the actual recipients are going to receive. Once you are comfortable using *DocumentBurster*™ you can go "live" and distribute the reports to the actual recipients.

7.1.1. Configuration

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Quality Assurance** , **Email Tester**

This is the screen used to configure and start the *Test Email Server*. Only *From Name* and *From Email Address* settings are required to be configured. The rest of the settings should remain with the default values.

Once the *Test Email Server* is configured/started the connection can be tested using the *Send Test Email* button.

7.1.2. Run Test

In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Quality Assurance**
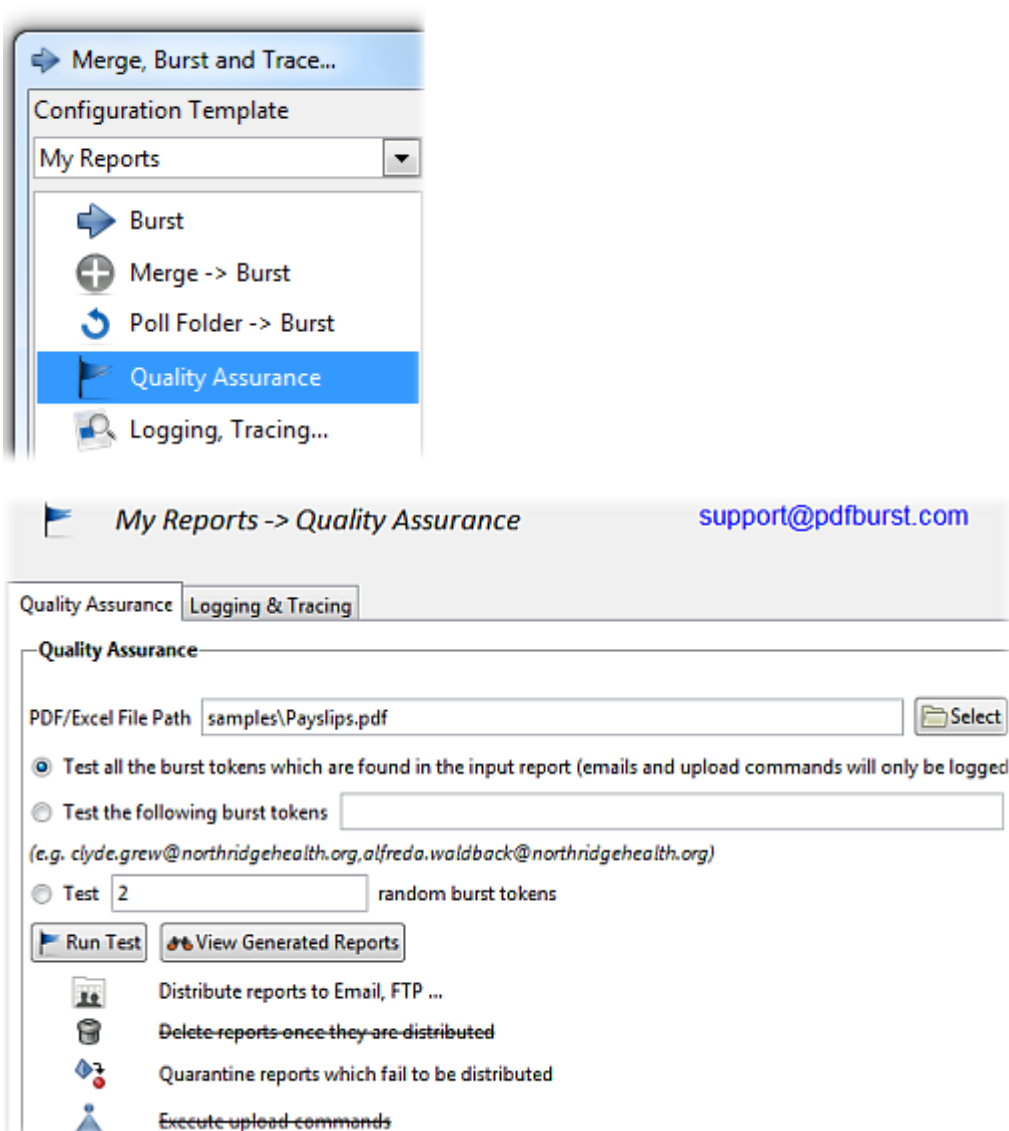
One of the following test modes can be selected:

- *Test all the burst tokens which are found in the input report (emails and upload commands will only be logged) – DocumentBurster*™ will test all the burst tokens which are found in the report. If *DocumentBurster*™ is configured to distribute reports then one *email (or upload) log* file will be generated for each different recipient (burst token). The email/upload log files will contain all the relevant information which is required to validate that the software is configured properly.

- *Test the following burst tokens – DocumentBurster*™ will test the (comma separated) list of burst tokens which are specified by the user. If *DocumentBurster*™ is configured to distribute reports then the corresponding emails will be sent to the test email address and will also be logged to separate log files. If configured as such then *DocumentBurster*™ will execute any relevant upload command(s) and will log the commands in the appropriate files. The email/upload log files will contain all the relevant information which is required to validate that the software is configured properly.

- *Test 2(configurable) random burst tokens – DocumentBurster*™ will test 2(configurable) random burst tokens. If *DocumentBurster*™ is configured to distribute reports then the corresponding emails will be sent to the test email address and will also be logged to separate log files. If configured as such then *DocumentBurster*™ will execute any relevant upload command(s) and will log the commands in the appropriate files. The email/upload log files will contain all the relevant information which is required to validate that the software is configured properly.

Once the test is finished all the generated emails will be available for inspection in the *Test Email Server* which is started and waits in the Windows (bottom right) system tray.
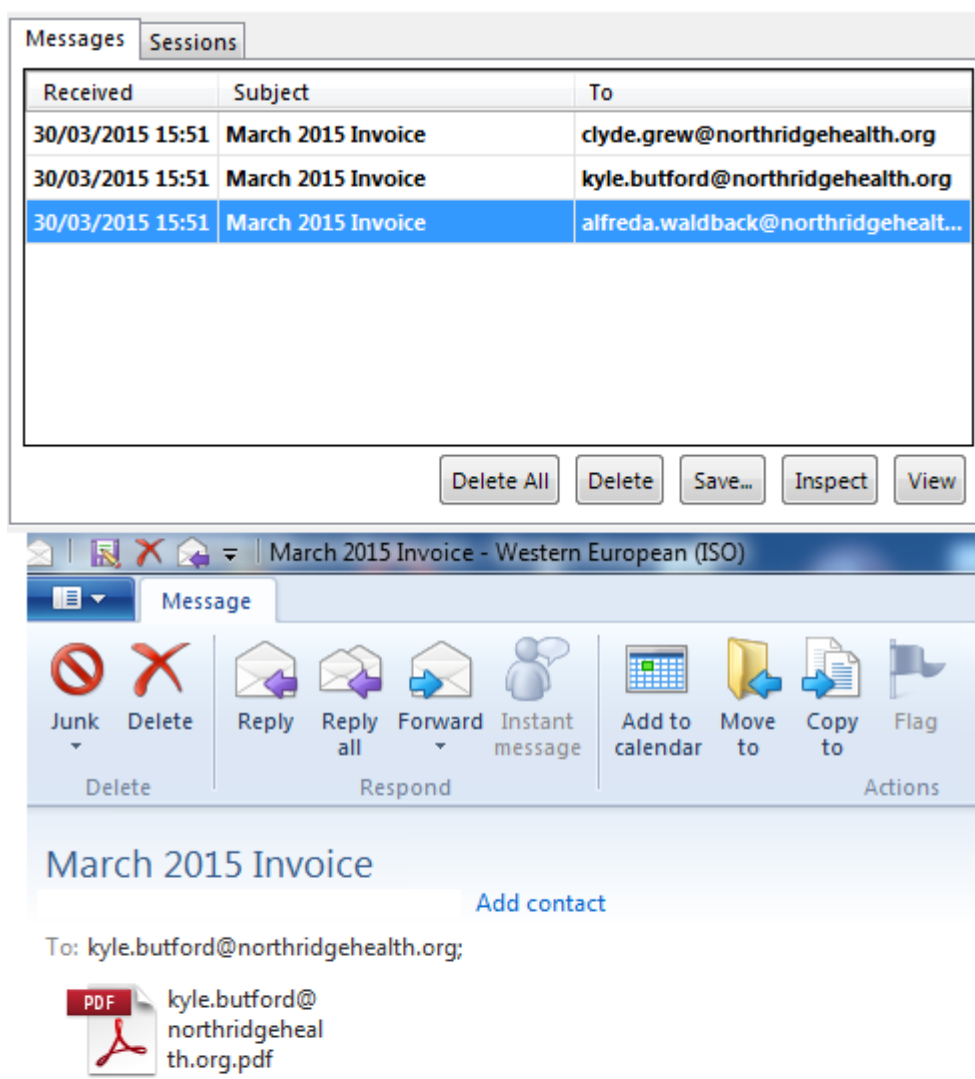
> **Note**
>
> While email distribution is the most common distribution method, *DocumentBurster*™'s quality assurance mechanism can be used to validate any upload/distribution configuration which the software currently supports (e.g. FTP, file share, etc.)

7.2. Logging

It is crucial for the software to properly distribute all the documents to the correct destinations. However sometimes, because of various reasons, the distribution of the documents might fail. This might happen because the email server connection details are not correct or because the server itself is down or maybe the SSL settings are not accurate.

DocumentBurster™ has support for logging all activities and for tracing back the reports which fail to be distributed.

In *DocumentBurster*™ main window select **Actions** , **Merge, Burst and Trace...** , **Logging, Tracing...**
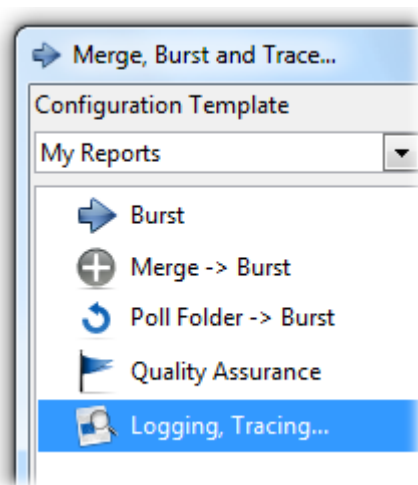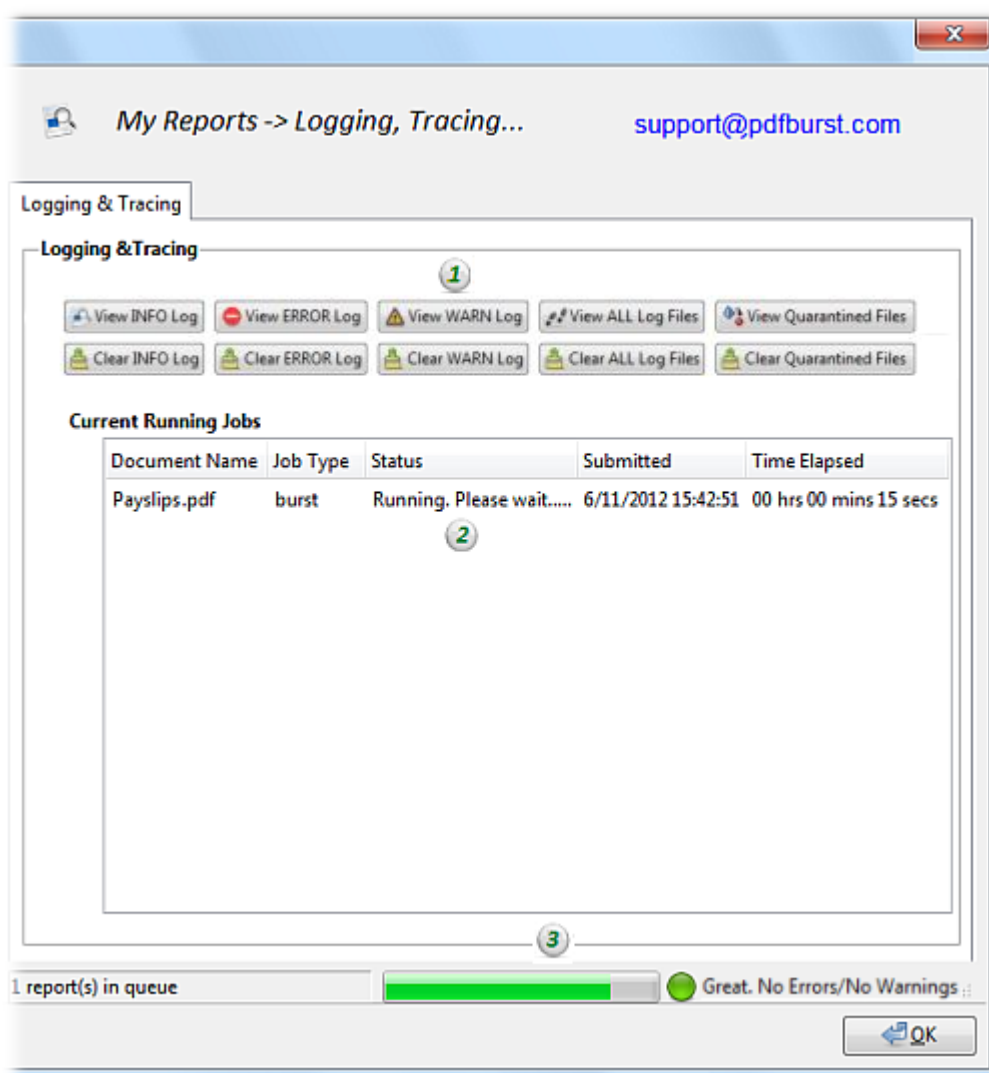
- *(1) - View/Clear Log and Quarantine Files* - Buttons to view/clear INFO, ERROR or WARN log files. View/Clear Quarantine Files are the buttons to view/clear the reports which are quarantined.

- *(2) - Current Running Jobs* - List with the jobs which are currently executing

- *(3) - Progress and Status Bars* - At the bottom of the screen there are a progress bar which shows the running progress and a status bar which displays possible problems. Green color means that there are no failed reports while the red color means that at least one report failed to be distributed and was quarantined.

By default, in order to keep the log files simple and clear, the program is logging the errors and the minimum necessary number of informative events.

If required, *DocumentBurster*™ can be configured to generate detailed log files. To do this please edit the file `log4j.xml` and make the following change

```
<!-- Log level value="debug" will make DocumentBurster more verbose -->
<level value="info" />
```

Do the bold change

```
<!-- Log level value="debug" will make DocumentBurster more verbose -->
<level value="debug"/>
```

Save the configuration file and run the program again. Now *DocumentBurster*™ will generate detailed log files which can be used for tracing of possible problems.

7.3. Send Processing Errors by Email

DocumentBurster™ can be configured to send an email whenever a problem is happening. To do this, please edit the file `log4j.xml` and un-comment the following line

```
<!-- <appender-ref ref="mailAppender" /> -->
```
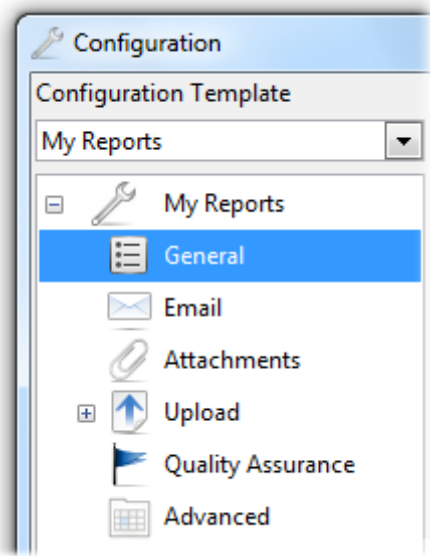
In addition, it is required to give all the correct email connection details in the *mailAppender* section.

7.4. Quarantine Reports Which Fail To Be Delivered

DocumentBurster™ can be configured to quarantine (save) the documents which fail to be delivered to a configurable folder. The failed documents should be reviewed at a later point in time in order to take a decision (either to distribute again or to do something else).

In *DocumentBurster*™ main window select **Actions** , **Configure** , **General**

- *Quarantine Folder* – Used to specify the folder where to quarantine the files which fail to be distributed. It should be a local folder and the default value is *quarantine/ $input_document_name$/$now; format="yyyy.MM.dd_HH.mm.ss"$* .

- *Quarantine reports which fail to be distributed* - If checked, the reports which fail to be distributed will be saved to the quarantine folder, otherwise no.

7.5. Error Handling

By default *DocumentBurster*™ software is stopping the report distribution when an error is happening. *DocumentBurster*™ software will wait for the root cause of the problem to be fixed before triggering again the same report. The reason for this default behavior is that usually the

problems are happening because of incorrect (or inconsistent) data and that all of these problems should be promptly fixed otherwise, when ignoring incorrect data (or misconfiguration), bigger problems will probably happen later.

Having said that, there are few legitimate situations in which the continuation of the report distribution might be the preferred choice. For example, you might be looking at distributing reports to 5000 customers out of which 3 customers have an incorrect email address in the database. Maybe the customer data was collected during a long period of time (and by many people) so few data problems are expected. In such a case you will not be willing to halt all the distribution and instead you will need to distribute the reports to all the correct addresses and, in the same time, to get a list with the incorrect email addresses which needs to be fixed afterwards.

In *DocumentBurster*™ main window select **Actions** , **Configure** , **Advanced** , **Error Handling**
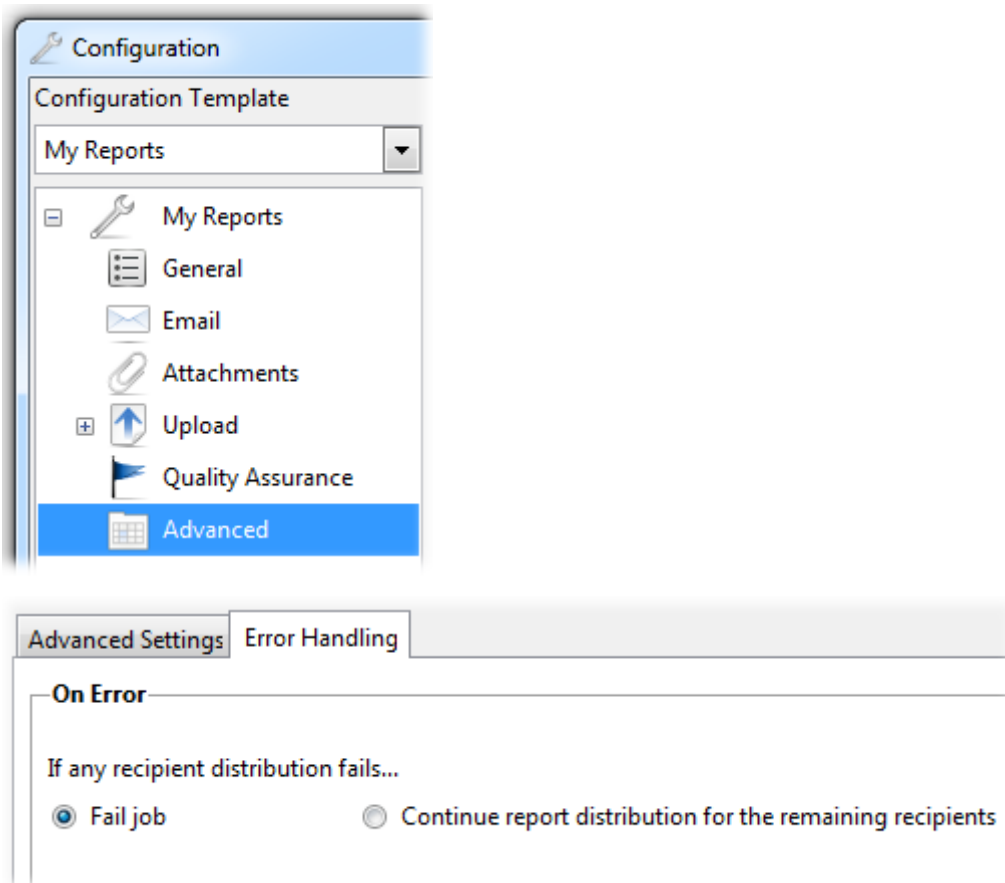
If any recipient distribution fails...

- *Fail job* - The report distribution is stopped when an error is happening. The offending error is reported through the log file. This is the default configuration.

- *Continue report distribution for the remaining recipients* - If any recipient distribution fails then the distribution continues for the remaining recipients. The offending errors are reported through the log file.

Command Line

DocumentBurster™ has a command line interface and can be integrated and executed from existing legacy software systems. All the features of the program are available through command line.

> **Important**
>
> Before running *DocumentBurster*™ in command line, the software should be properly configured.
>
> For more details about configuring *DocumentBurster*™ please read *Section 1.3, "Configuration"*

8.1. Usage

Following is the *DocumentBurster*™ command line usage

```
usage: DocumentBurster
 -b,--burst                 Burst the merged file
 -c,--configuration <arg>   Configuration file
 -f,--file <arg>            Input file
 -m,--merge <arg>           List of files to merge
 -o,--output <arg>          Name of the output merged file
 -p,--poll <arg>            Start polling a folder for reports
 -ta,--testall              Test all the burst tokens found in the input
                            document
 -tl,--testlist <arg>       Comma separated list of burst tokens which
                            should be tested
 -tr,--testrandom <arg>     Number of random burst tokens which should be
                            tested
```

8.2. Burst Reports

A. Windows

Following is the syntax for running the program

```
documentburster.bat        -f        <pathOfTheFileToBurst>        [-c
<pathOfTheConfigurationFileToUse>]
```

- –f <pathOfTheFileToBurst> - Mandatory argument. Path to the PDF or Excel report to burst.

- -c <pathOfTheConfigurationFileToUse> - Optional argument. Path to the configuration file to be used.

For example the command

```
documentburster.bat –f samples/Payslips.pdf
```

will burst the `Payslips.pdf` file located in the `samples` folder using the default `config/burst/settings.xml` configuration file.

B. Unix/Linux

Following is the syntax for running the shell script

```
./documentburster.sh         -f         <pathOfTheFileToBurst>         [-c
<pathOfTheConfigurationFileToUse>]
```

For example the command

```
./documentburster.sh -f samples/Payslips.pdf
```

will burst the `Payslips.pdf` file located in the `samples` folder using the default `config/burst/settings.xml` configuration file.

8.3. Merge Reports

A. Windows

Following is the syntax for running the program

```
documentburster.bat -m <"pathOfTheFileToMerge1|...|pathOfTheFileToMergeN"> [-o
<mergedFileName>] [-b]
```

- –m <"pathOfTheFileToMerge1|...|pathOfTheFileToMergeN"> - Mandatory argument. List of the PDF reports to merge (separated by the | character).

- -o <mergedFileName> - Optional argument. The name of the output merged file. If it is not specified then the `merged.pdf` file name is assumed by default.

- -b - Optional argument. Optional switch which specifies that the resulted merged file should be also burst.

For example the command

```
documentburster.bat  -m  "samples/Invoices-Oct.pdf|samples/Invoices-Nov.pdf|
samples/Invoices-Dec.pdf" -o Invoices-1st-Quarter.pdf -b
```

will first concatenate the files `Invoices-Oct.pdf`, `Invoices-Nov.pdf` and `Invoices-Dec.pdf` (-m) into a file called `Invoices-1st-Quarter.pdf` (-o) and will burst the merged file (-b).

B. Unix/Linux

Following is the syntax for running the program

```
./documentburster.sh -m <"pathOfTheFileToMerge1|...|pathOfTheFileToMergeN"> [-
o <mergedFileName>] [-b]
```

8.4. Poll Folder for Incoming Reports

A. Windows

Following is the syntax for running the program

```
documentburster.bat –p <pathOfTheFolderToPoll>
```

For example the command

```
documentburster.bat –p poll
```

will start polling the folder `poll` for incoming reports to process.

B. Unix/Linux

Following is the syntax for running the shell script

```
./documentburster.sh –p <pathOfTheFolderToPoll>
```

For example the command

```
./documentburster.sh –p poll
```

will start polling the folder `poll` for incoming reports to process.

8.5. Quality Assurance

A. Windows

1. Following is the syntax for testing all the burst tokens

```
documentburster.bat         –f         <pathOfTheFileToBurst>         [-c
<pathOfTheConfigurationFileToUse>] -ta
```

For example the command

```
documentburster.bat –f samples/Payslips.pdf -ta
```

will test all the burst tokens which are found in the `Payslips.pdf` file located in the `samples` folder using the default `config/burst/settings.xml` configuration file.

2. Following is the syntax for testing a comma separated list of tokens

```
documentburster.bat         –f         <pathOfTheFileToBurst>         [-c
<pathOfTheConfigurationFileToUse>] -tl <"token1,token2,...tokenN">
```

For example the command

```
documentburster.bat         –f         samples/Payslips.pdf         -tl
"clyde.grew@northridgehealth.org,alfreda.waldback@northridgehealth.org"
```

will test the tokens *clyde.grew@northridgehealth.org* and *alfreda.waldback@northridgehealth.org* which are found in the `Payslips.pdf` file located in the `samples` folder using the default `config/burst/settings.xml` configuration file.

3. Following is the syntax for testing random tokens

```
documentburster.bat        -f        <pathOfTheFileToBurst>        [-c
<pathOfTheConfigurationFileToUse>] -tr <N>
```

For example the command

```
documentburster.bat -f samples/Payslips.pdf -tr 2
```

will test two random tokens which are found in the `Payslips.pdf` file located in the `samples` folder using the default `config/burst/settings.xml` configuration file.

B. Unix/Linux

1. Following is the syntax for testing all the burst tokens

```
./documentburster.sh        -f        <pathOfTheFileToBurst>        [-c
<pathOfTheConfigurationFileToUse>] -ta
```

2. Following is the syntax for testing a comma separated list of tokens

```
./documentburster.sh        -f        <pathOfTheFileToBurst>        [-c
<pathOfTheConfigurationFileToUse>] -tl <"token1,token2,...tokenN">
```

3. Following is the syntax for testing random tokens

```
./documentburster.sh        -f        <pathOfTheFileToBurst>        [-c
<pathOfTheConfigurationFileToUse>] -tr <N>
```

Part III. DocumentBurster Server

Part III presents how to configure and run *DocumentBurster*™ *Server* in order to benefit from additional powerful capabilities like scheduled report distribution, capability to run as windows services and a browser based web interface which can be accessed simultaneously by multiple people.

DocumentBurster Server

DocumentBurster™ Server can be deployed as a central system to provide report bursting and report distribution services to multiple people or software applications from your organization.

DocumentBurster™ Server has all the capabilities of *DocumentBurster™* and some additional advanced features like

- *Server Architecture* in order to support multiple people or applications from within your organization

- *Web Based User Interface* which is compatible with all the major browsers - Internet Explorer, Firefox, Chrome, Opera and Safari

- *Windows Services* support in order to achieve unattended report bursting and report distribution

- *Job Monitoring Console* to see the currently executing jobs and trace the status for previously submitted jobs

- *Scheduling* support which allows to define nightly, monthly or custom schedules for the report bursting and report distribution jobs

In addition, if required, *DocumentBurster™ Server* is a powerful platform which has the foundation to add and tailor other additional report distribution features which an organization might need, for example

- Burst, split and merge any report format (out of the box *DocumentBurster™* can process PDF and Excel reports)

- Full indexing and search capabilities for the reports which are being burst and distributed. In simple words this feature allows to quickly find a report which was distributed one year ago - even if your company is distributing a big number of reports each month.

9.1. Installation

9.1.1. Prerequisites

DocumentBurster™ Server software has the same prerequisites like *DocumentBurster™* . If required, please read the *DocumentBurster in 5 Minutes* [https://www.pdfburst.com/docs/html/quickstart/index.html#software.prerequisites] to install the prerequisites for running the software.

9.1.2. Download *DocumentBurster™ Server*

For evaluation purposes, *DocumentBurster™ Server* can be downloaded from this link - *https://s3.amazonaws.com/documentburster/newest/documentburster-server.zip* .

Extract the zip archive to a drive like `C:/`

Once the zip file is extracted, a new directory will be available (e.g. - `C:/ DocumentBurster-5.2.8)` which will contain the following two sub-directories

- `server` - contains the binaries and the scripts for starting and stopping the report bursting server

- `web-console` - binaries and scripts for the *DocumentBurster™ Web Console*

9.2. Start and Stop

9.2.1. Server

1. Configuration

DocumentBurster™ Server is configured using the same GUI interface (`DocumentBurster.exe`) like *DocumentBurster™ . DocumentBurster™* configuration was described in detail in *Section 1.3, "Configuration"* .

2. Starting and Stopping

- Starting - once configured, the server can be started using `server/startServer.bat` (Windows) or `server/startServer.sh` (Linux) scripts.

- Stopping - `server/shutServer.bat` (Windows) or `server/shutServer.sh` (Linux) scripts should be used to stop the server.

3. Automatic Polling

Once started the server is automatically checking for new reports to process in the `server/ poll` directory. Any report which is dropped to `server/poll` folder is automatically picked up and processed by *DocumentBurster™ Server.*

9.2.2. Web Console

1. Dependency

Web Console depends on *Server* - When starting, the *web console* is connecting to the *server* so, it is mandatory to have the *server* component started first.

2. Starting and Stopping

- Starting - once the *server* is started, the *web console* can be started using `web-console/ startConsole.bat` (Windows) or `web-console/startConsole.sh` (Linux) scripts.

- Stopping - `web-console/shutConsole.bat` (Windows) or `web-console/shutConsole.sh` (Linux) scripts should be used to stop the console.

Once started *DocumentBurster™ Web Console* application can be accessed by typing following URL in your browser

http://machine-name:8080/burst for example

http://localhost:8080/burst

> ### Important
>
> Sometimes, due to wrong configuration, the web console might fail to start properly. The solution to this problem can be found by reading *Section E.2.10, " Windows - DocumentBurster Web Console Is Failing to Start? "* troubleshooting entry.

9.3. Web Console

DocumentBurster™ Server is coming with a web based interface which can be accessed from any major web browser (e.g. Mozilla Firefox, Internet Explorer, Google Chrome, etc.). The web interface can be used for triggering new ad hoc jobs, scheduling jobs for later execution or for viewing the status, history and detailed logs of the previously submitted jobs.

The web console needs the server to be started, so make sure it is so. After the server is started, in the folder where the software was extracted, please execute `web-console/startConsole` script to get the console started. After few seconds the application can be accessed by typing following URL in the browser

http://machine-name:8080/burst

for example

http://localhost:8080/burst

9.3.1. User Authentication

Users need to authenticate for using *DocumentBurster™ Web Console*.

When the application it's initially installed it comes with a default **burst** username and **burst** password.

9.3.1.1. Add/Remove *DocumentBurster*™ *Web Console* Users

Users can be added, removed or updated through the `web-console/config/users.properties` user configuration file. Each user should be configured on a new line using the syntax

user=*password*,ROLE_USER

ROLE_USER is a constant which all the users will have.

9.3.2. Submit Bursting Jobs

1. Ad hoc/Immediate Jobs - Reports can be immediately burst and distributed through the **Files** → **Submit Burst Jobs** menu entry.

2. Scheduled Jobs can be submitted through the **Files** → **Schedule Burst Jobs** menu entry. Uploaded report files are placed in the `server/input-files/scheduled` folder being scheduled for execution at a later time.
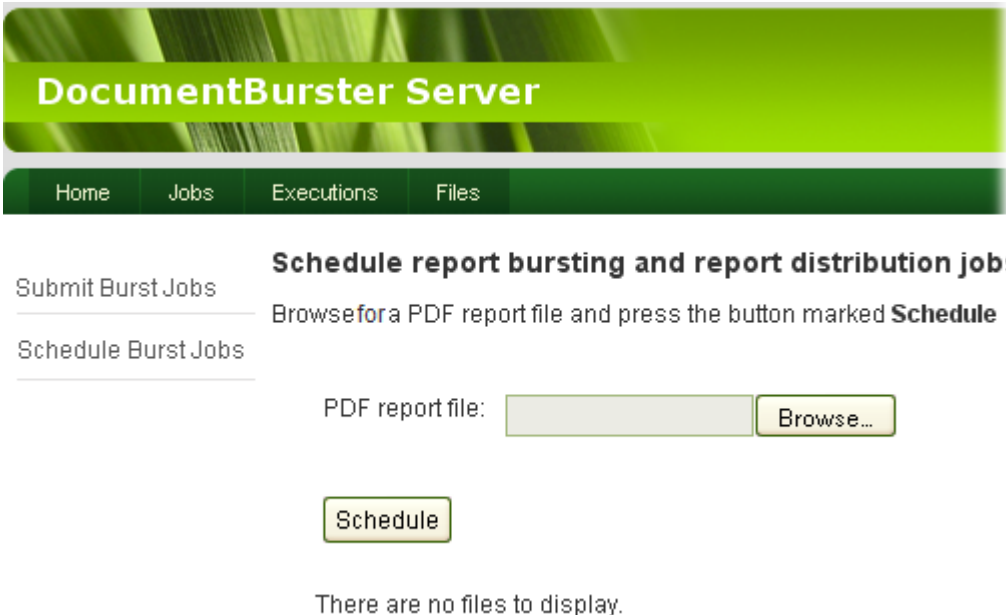
DocumentBurster™ *Web Console* can be used to submit new jobs for immediate execution, to schedule jobs for later execution, to view the currently running jobs or to check the status, history and the logs of the previously submitted jobs.

9.3.3. Screenshots

Following are some screenshots from the application.
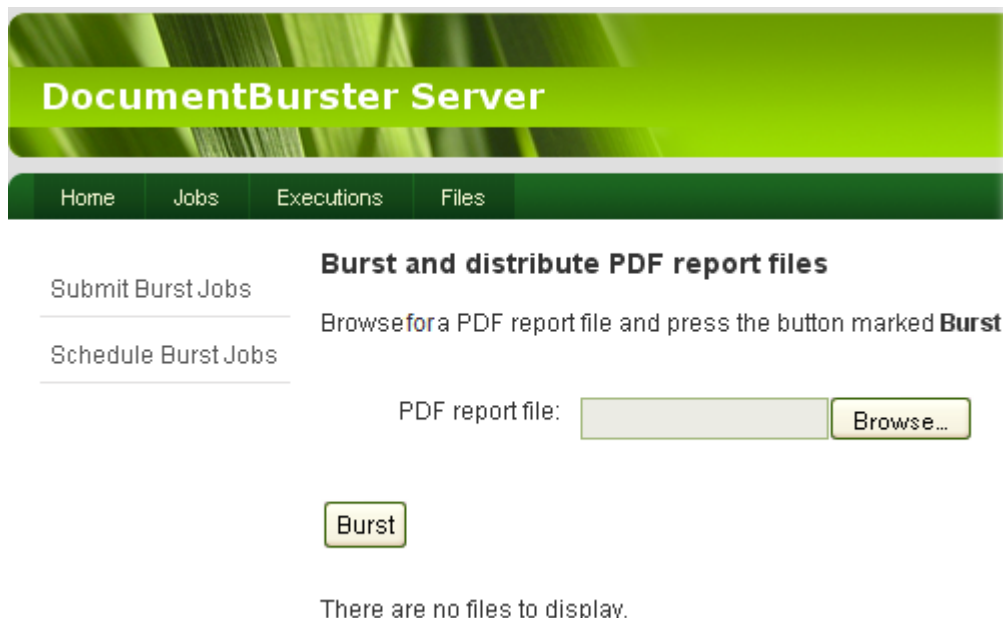
Burst reports - uploaded reports are picked up and processed by the server

Schedule report bursting jobs - schedule documents for distribution at a later time

Jobs page

DocumentBurster™ Server job executions page - view status and history of distribution jobs

Detailed information for the selected job

- (1) - Status of the job

- (2) - Logging details for the failed jobs

9.4. Run *DocumentBurster*™ at System Startup

Being a server application, *DocumentBurster*™ can be configured to run in the background as long as the operating system is running.

Following paragraphs will detail how to configure *DocumentBurster*™ to run automatically when the system is starting. The screenshots are taken from Windows 7 and the same can be similarly achieved on any other Windows distribution.

DocumentBurster™ software can start when the Microsoft Windows operating systems is booted, either

- By configuring *DocumentBurster*™ to run as standard *Windows services,* or

- By *scheduling DocumentBurster*™ to run *When the computer starts*

The above options are two different ways for solving similar requirements. You are free to choose the option which is best fitting your needs.

Following is how to configure each option in detail.

9.4.1. Windows Services

Both the *server* and the *web console* components can be separately configured to be executed as Windows services.

The *server* is the mandatory component which is doing the report processing while the *web console* will be started as a web GUI interface for posting the reports to the server.

DocumentBurster™ *Web Console* depends on the server to be started and, as a result, the *DocumentBurster*™ *Web Console* Windows service will be automatically configured to depend on the *DocumentBurster*™ *Server* Windows service.

9.4.1.1. *DocumentBurster*™ *Server*

The server will be configured as a service using the `server/service.bat` script.

Procedure 9.1. Configure *DocumentBurster*™ *Server* as a Windows service

1. In the command prompt, using the `cd` command, switch to the folder where the server is installed. For example, assuming *DocumentBurster*™ is extracted in the folder `c:/DocumentBurster` then

2. Execute the command `service.bat install`

DocumentBurster™ Server Windows service is now installed and it is properly listed in **Control Panel** → **Administrative Tools** → **Services**
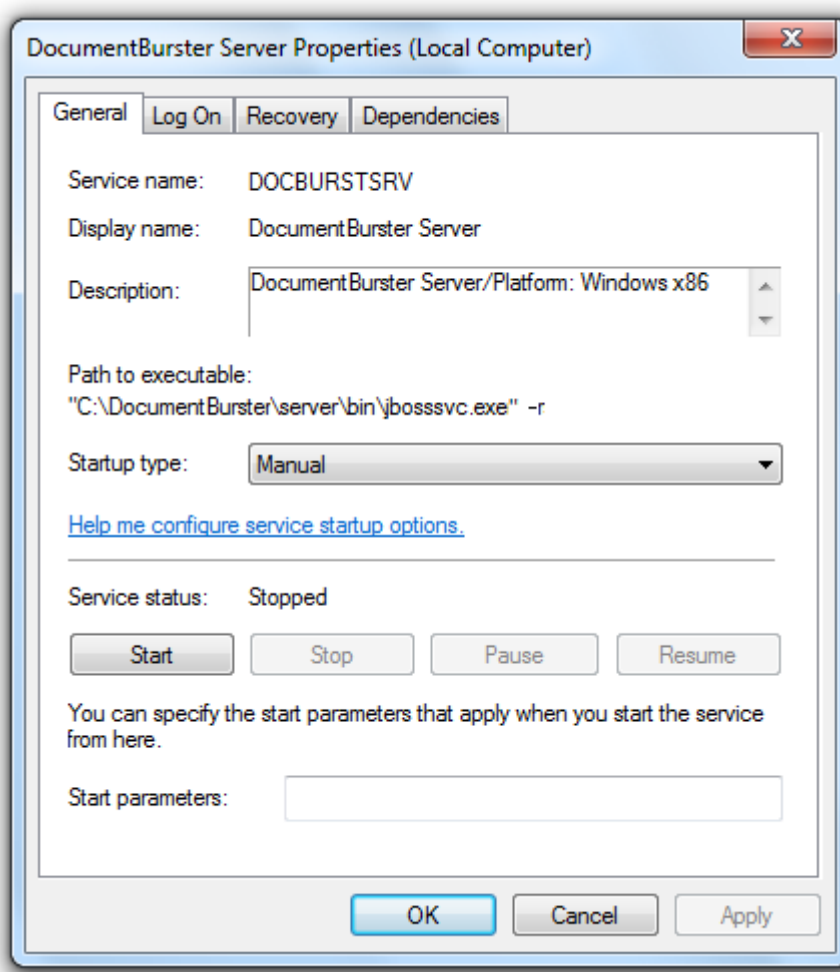
By default the service is stopped and it is configured as having the *Startup Type 'Manual'.*

9.4.1.2. *DocumentBurster*™ *Web Console*

DocumentBurster™ *Web Console* will be configured as a Windows service by following the same steps which were previously presented for the *DocumentBurster*™ *Server* component. The web console will be configured as a service using the `web-console/console/bin/service.bat` script.

DocumentBurster™ *Web Console* Windows service will be automatically configured to depend on the previously installed *DocumentBurster*™ *Server* Windows service.
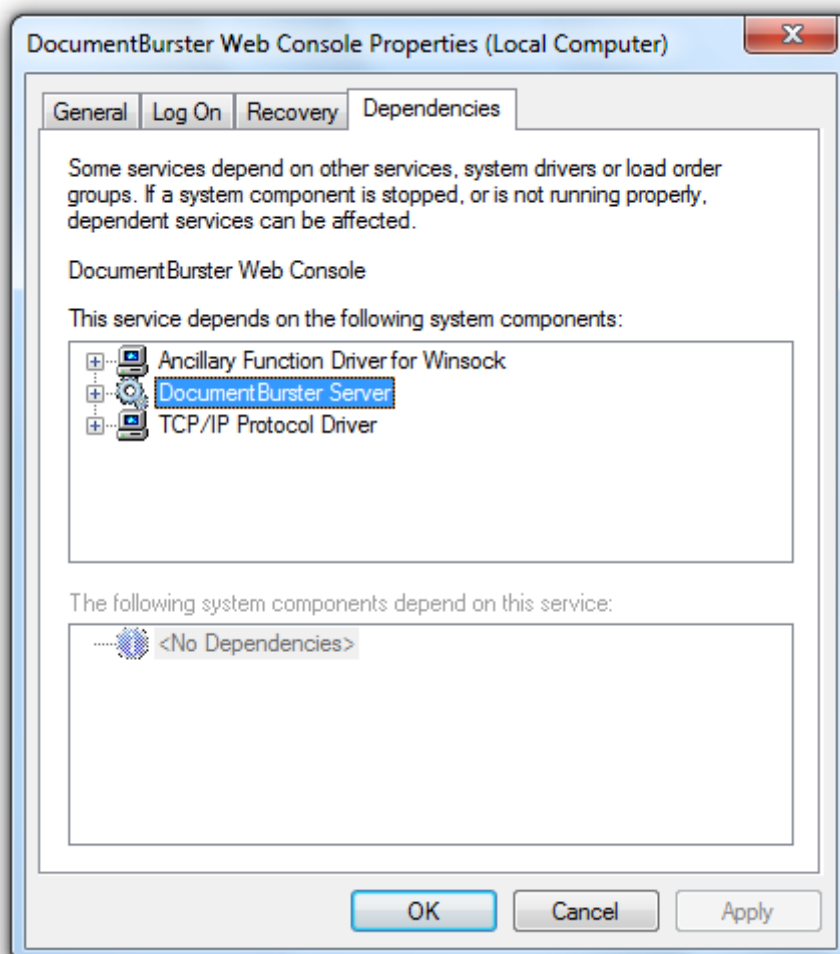
> ### Important
>
> On Windows Server 2008 R2 it is required to execute the `service.bat install` DOS commands with elevated or administrative privileges. To run these commands, you can use the `Run as administrator` command
>
> - Click the **Start** button
>
> - In the Search box, type `command prompt`

> • In the list of results, right-click `Command Prompt` , and then click `Run as administrator` . If you are prompted for an administrator password or confirmation, type the password or provide confirmation.

ℹ️ Note

If required, both *DocumentBurster™ Server* and *DocumentBurster™ Web Console* Windows services can be individually uninstalled from the system by executing the command `service.bat remove` on their corresponding script file.

Before uninstalling, please make sure that the services are properly stopped.

9.4.2. Windows Scheduling

If you find too heavy running *DocumentBurster™* as Windows Services then Windows Scheduled Tasks is another option for getting *DocumentBurster™* to automatically start when Windows is starting.

Procedure 9.2. Set up *DocumentBurster™ Server* using *Windows Scheduling*

The screenshots are showing how to schedule `server/startServer.bat` script in order to automatically start the *server* component.

1. In *Windows 7* select **Start** , **Search** , **Task Scheduler** , **Create Basic Task...**
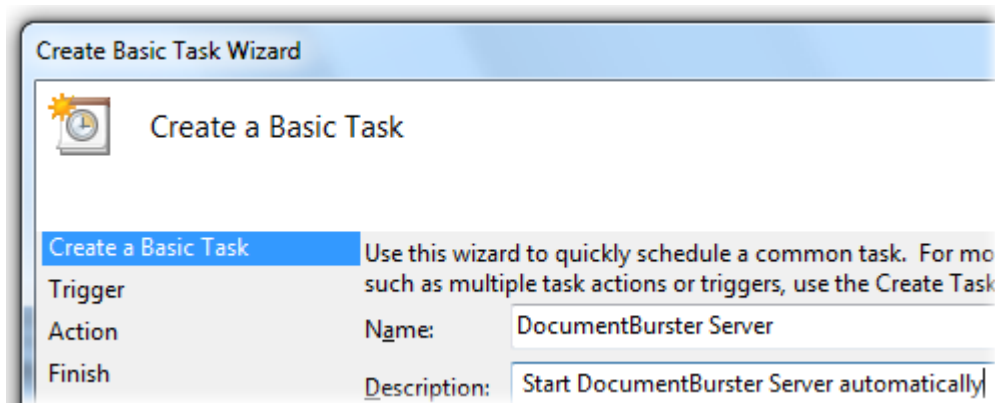
2. Click `Next`
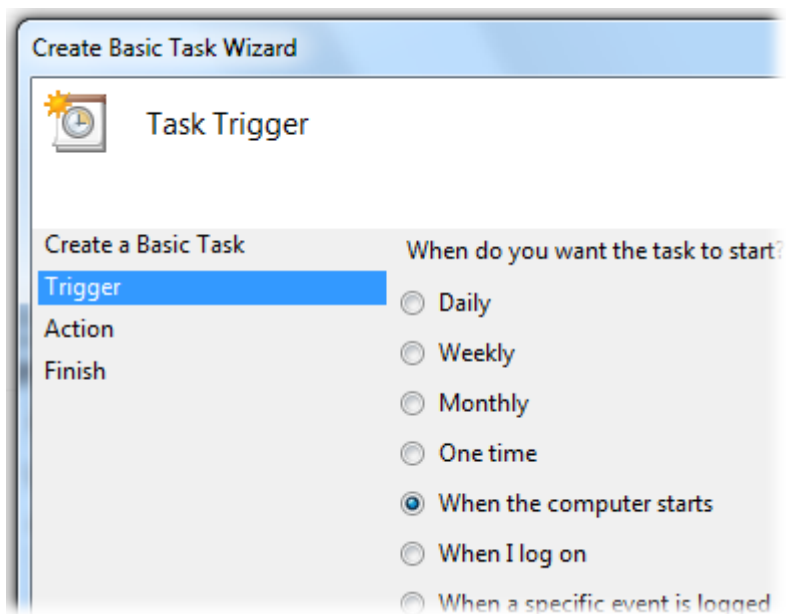
3.   Click `Next`
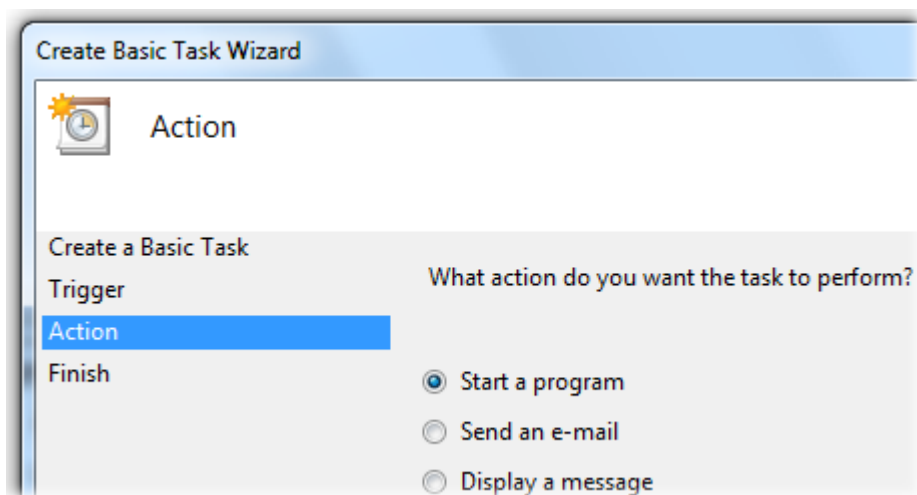
4.   Click `Next`
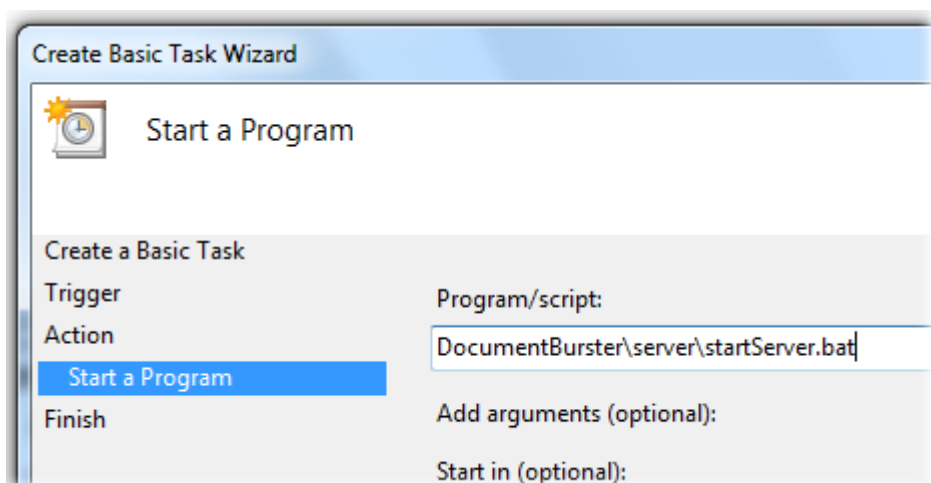
5. Click `Next` and then `Finish` to get the task scheduled.
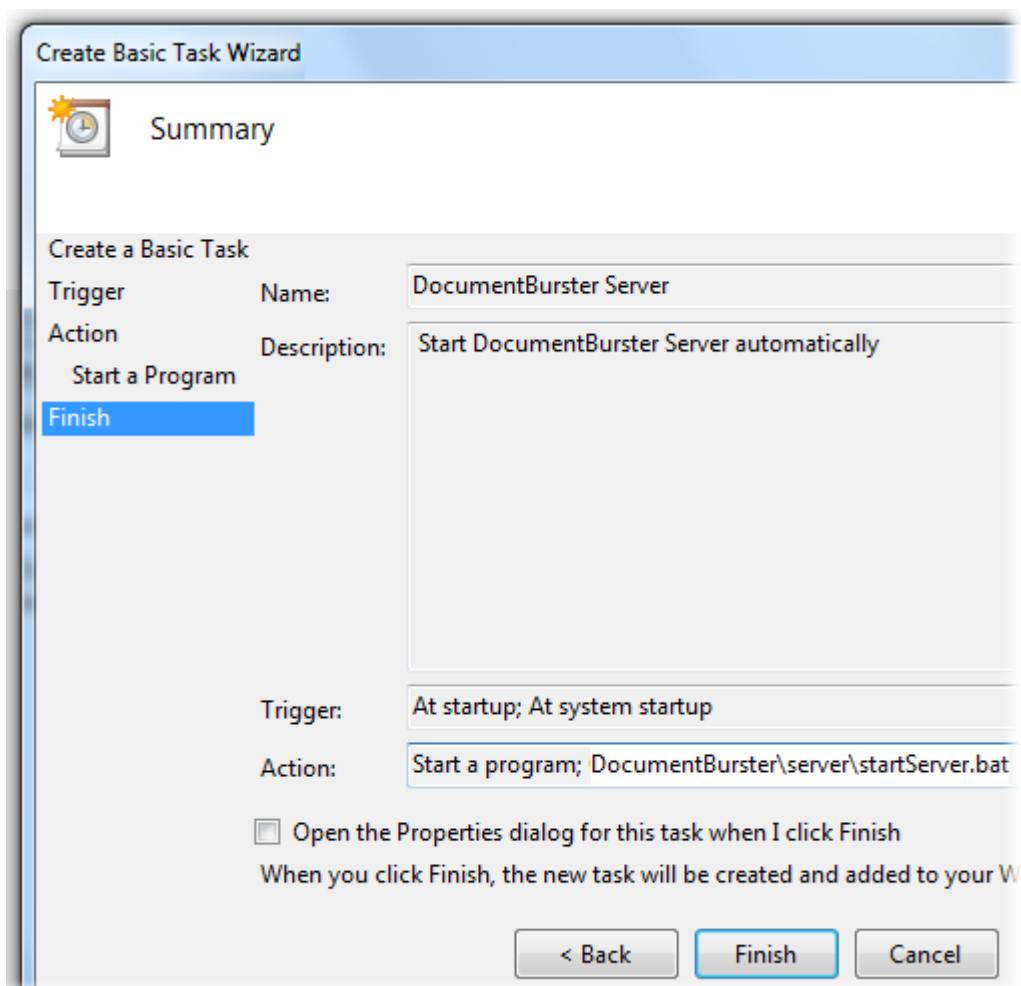
6. Done. `server/startServer.bat` script was scheduled to start when Windows is starting.

> **Note**
>
> The above screenshots show how to schedule the `server/startServer.bat` script in order to automatically start the *server* component. The same can be done for `web-console/startConsole.bat` script in order to automatically start the *DocumentBurster™ Web Console.*

> **Important**
>
> *DocumentBurster™ Web Console* depends on the server to be started and, as a result, the `web-console/startConsole.bat` batch file should be scheduled to start just after the `server/startServer.bat` component had been started.

9.5. Scheduling

DocumentBurster™ Server can handle scheduled report bursting and report distribution jobs. By default the software can handle jobs scheduled for nightly (midnight) execution. If this is what it is required, then it is nothing more to be configured in regards with scheduling. On the other hand, it is possible to customize the scheduling - familiarity with other cron like schedulers will help in understanding better the scheduling mechanism implemented in *DocumentBurster™ .* Yearly, monthly, weekly, daily, hourly or any other custom report bursting schedule jobs are all possible to define.

While for executing ad hoc, immediate report bursting jobs, *DocumentBurster™ Server* is checking the `server/poll` folder, scheduled reports should be placed in the `server/input-files/scheduled` directory. *DocumentBurster™* will properly trigger the report bursting and report distribution jobs to happen at the correct date and time, depending on how the scheduling is configured.

9.5.1. Configuration

DocumentBurster™ Server scheduling is configured using *cron expressions.*

By default the scheduler is configured to run daily, at midnight. In order to change the default (daily) configuration you need to update the cron expression entry at the end of the configuration file

`server/config/batch/internal/batch-context.xml`

See below sample of the cron (scheduling) entry

```
<task:scheduled-tasks scheduler="scheduler">
 <task:scheduled ref="scheduled" method="run" cron="0 0 0 * * ?" />
</task:scheduled-tasks>
```

The text *cron="0 0 0 * * ?"* is the *cron expression* of particular interest in regards with configuring the scheduling. *0 0 0 * * ?* is the encoding to configure the default daily (midnight) schedule. The previous default cron expression can be replaced with any other valid expression, based on the requirements, in order to schedule yearly, monthly, weekly, daily - at different time or hourly report processing jobs. *Cron expression* documentation is out of the scope of this user guide, more details about how to configure a cron expression can be found at

- *CRON expression - Wikipedia* [http://en.wikipedia.org/wiki/CRON_expression]

- *CRON expression - Quartz documentation* [http://www.quartz-scheduler.org/documentation/ quartz-1.x/tutorials/crontrigger]

> **Important**
>
> A *DocumentBurster*™ *Server* restart is required whenever the cron expression configuration is changed.

Part IV. DocumentBurster Portal

Part IV presents *DocumentBurster™ Portal* which is our cloud-based managed services *DocumentBurster™* solution.

DocumentBurster Portal

DocumentBurster™ Portal is our *DocumentBurster™* cloud-based managed services solution.

DocumentBurster™ Portal allows our customers to focus on their business, instead of their report building, report generation, document distribution or how to build a mechanism to accept customer payments online. *DocumentBurster™ Portal* is a cloud-hosted web software which can be used to generate and send personalized documents to customers, manage and track documents sent to customers and to (optionally) accept payments online from your customers.

10.1. Use Cases

DocumentBurster™ Portal is a cloud document platform which can be used for

- Online report and document generation

- Online report/document publishing and distribution

- Accepting customer payments online (optionally)

- Tracking financial documents sent to customers (which customers paid, which customers didn't pay yet, send reminders for overdue payments, etc.)

Use Cases

DocumentBurster™ is used by people to implement the following

- *Web + DocumentBurster = Documents2People* [https://portal.pdfburst.com/use-cases/]

- *Web + DocumentBurster = Customer Payment Portal* [https://portal.pdfburst.com/use-cases/customer-payment-portal/]

- *Web + DocumentBurster = Invoices2People* [https://portal.pdfburst.com/use-cases/invoices-to-people/]

- *Web + DocumentBurster = Bills2People* [https://portal.pdfburst.com/use-cases/bills-to-people/]

- *Web + DocumentBurster = PurchaseOrders2People* [https://portal.pdfburst.com/use-cases/purchase-orders-to-people/]

- *Web + DocumentBurster = Statements2People* [https://portal.pdfburst.com/use-cases/statements-to-people/]

- *Web + DocumentBurster = Payslips2People* [https://portal.pdfburst.com/use-cases/payslips-to-people/]

- *Web + DocumentBurster = SchoolReports2People* [https://portal.pdfburst.com/use-cases/school-reports-to-people/]

- *Web + DocumentBurster = Contracts2People* [https://portal.pdfburst.com/use-cases/contracts-to-people/]

- *Web + DocumentBurster = AnyDocument2People* [https://portal.pdfburst.com/use-cases/any-document-to-people/]

10.2. 1 Minute Walk-Through

The easiest way to understand how *DocumentBurster™ Portal* works is to follow our *1 Minute Walk-Through* [https://portal.pdfburst.com/use-cases/customer-payment-portal/] showing the platform's high level capabilities in action.

10.3. Test Drive *DocumentBurster™ Portal*

You can also take our live *Customer Payment Portal demo* [https://portal.pdfburst.com/] and understand how *DocumentBurster™ Portal* can be used to send documents (i.e. invoices) to customers and manage documents sent to customers.

You can take the demo as

- *AdminLoginDemo* [https://portal.pdfburst.com/demo/login/] - Login to manage invoices sent to customers and keep track which customers paid and which didn't pay yet their invoices (use demo/demo for user/password)

- *PayInvoiceDemo* [https://portal.pdfburst.com/invoices/0009] - Customer which is paying the invoice (*Demo Mode – No Real Money Involved*)

10.4. Screenshots

All documents are uploaded to *DocumentBurster™ Portal*
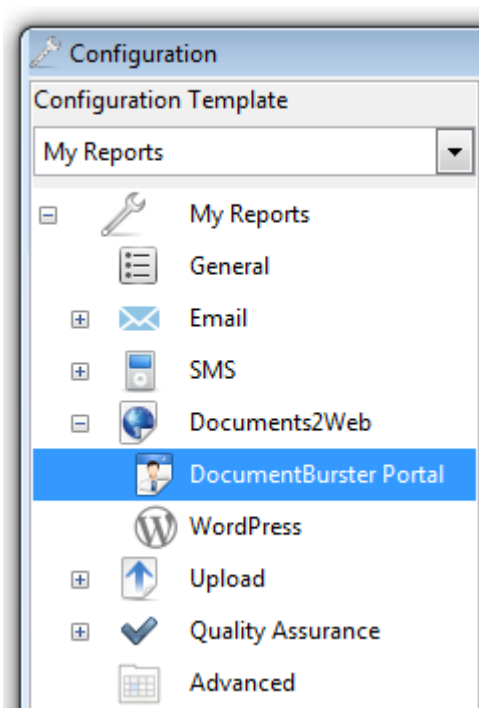
My Reports -> DocumentBurster Portal

DocumentBurster Portal | License

Web + *DocumentBurster* = Your Document Portal

Test Drive	https://portal.pdfburst.com
***DocumentBurster* Portal**	DocumentBurster Cloud Managed Services
Command	[ ] 🔍 Variables
Example	--user "documentburster:password" -X POST --data "code=1234 &customer=Northridge Pharmaceuticals &product=Nebulizer Machine&amount=200.00 &date=December 28th, 2015&status=Unpaid" https://portal.pdfburst.com/wp-json/pods/invoices
	https://portal.pdfburst.com/use-cases/
Use Cases	Web + DocumentBurster = Customer Payment Portal Web + DocumentBurster = Invoices2People Web + DocumentBurster = Bills2People Web + DocumentBurster = PurchaseOrders2People Web + DocumentBurster = Statements2People Web + DocumentBurster = Payslips2People Web + DocumentBurster = SchoolReports2People Web + DocumentBurster = Contracts2People Web + DocumentBurster = AnyDocument2People

You login with an administrator password to manage uploaded documents

DocumentBurster Portal

👤 Username

🔒 Password

Log in

☐ REMEMBER?

Code	Customer ▲	Amount	Status ▲	Action ▲	Due Date ▼
11	Stark Industries	2.000,00	Unpaid		01 Oct 2020
10	Nakatomi Trading Corp.	1.100,00	Passed Due	Remind	30 Sep 2015
9	Clampett Oil	1.000,00	Passed Due	Remind	15 Sep 2015
8	Clampett Oil	600,00	Passed Due	Remind	01 Sep 2015
7	Wayne Enterprises	300,00	Passed Due	Remind	15 Aug 2015
3	AmerTek	1.500,00	Paid	OK	01 Aug 2015
1	Acme Corp.	1.000,00	Paid	OK	01 Aug 2015
5	Oceanic Airlines	700,00	Paid	OK	01 Aug 2015
2	Acme Corp.	500,00	Paid	OK	01 Aug 2015
6	Wayne Enterprises	400,00	Paid	OK	01 Aug 2015

Showing 1 to 10 of 11 entries

10.5. Accept Online Payments (Optional)

You can use the *DocumentBurster™ Portal's* built-in mechanism to accept customer payments online.

Customers can start paying your invoices in a matter of minutes.

Accepting Online Payments is an optional *DocumentBurster™ Portal* feature.

10.6. Document Analytics (Optional)

DocumentBurster™ Portal being a web application it's possible to track documents using Analytics and see who paid, who did not pay, who viewed or who didn't view yet the documents, etc.

For instance, if you need such detailed information about the distributed documents, it's possible to implement a Google Analytics dashboard similar with the following

It's possible to track which documents were viewed and which weren't, which documents were paid and which weren't, the revenue generated, geographic locations from where the documents were viewed and lots of other useful metrics.

Document Analytics is an optional *DocumentBurster™ Portal* feature.

10.7. Customization

Depending on your needs the same *DocumentBurster™ Portal* solution can be deployed to manage invoices, bills, purchase orders, statements, payslips, school fees, school grades, school reports or any other document which should be sent to your customers, employees or partners.

The layout (i.e. logo, brand, headers, footers, colors) of the implemented documents will be crafted to match the look and feel you would require.

10.8. Contact Us

Don't hesitate to contact us for any further *DocumentBurster™ Portal* enquiries you might have.

- Email: `<support@pdfburst.com>`

- Contact Us: *https://www.pdfburst.com/contact.html*

Part V. Appendices

Appendix A. *DocumentBurster*™ vs. *DocumentBurster*™ *Server* vs. *DocumentBurster*™ *Portal*

A.1. Which *DocumentBurster*™ Flavor to Choose?

DocumentBurster™ software has three different flavors

- *DocumentBurster*™

- *DocumentBurster*™ *Server*

- *DocumentBurster*™ *Portal*

Which version of the software you will choose depends on your specific needs. This chapter will offer additional details required to make this decision.

A.2. *DocumentBurster*™

DocumentBurster™ is a normal (desktop) application which a user will configure and use on his or her work computer. This is the version of the software which you (most) probably downloaded and tested initially. *DocumentBurster*™ has all the report bursting and report distribution capabilities you would expect including report distribution by email, SMS or web and the capability to upload the reports to remote servers through various protocols.

DocumentBurster™ is usually purchased by companies where the "end-users" (people) (vs. enterprise ERP/CRM apps) are the main consumers of the application.

DocumentBurster™ is easier to configure but will require a separate installation/license for each separate user/machine.

A.3. *DocumentBurster*™ *Server*

DocumentBurster™ *Server* has all the bursting features of *DocumentBurster*™ and few additional capabilities targeted towards a more 100% hands off automation when integrated in an enterprise environment working alongside other ERP or CRM business applications. *DocumentBurster*™ *Server* is usually deployed on a "central" Windows Server machine and can be simultaneously used by multiple people and/or applications within your organization. For instance five (5) people can use a single central *DocumentBurster*™ *Server* installation through their own web browsers. *DocumentBurster*™ *Server* can be installed/started/executed automatically in the background as Windows Services. *DocumentBurster*™ *Server* has also scheduling capabilities and can automatically "poll" a folder to pick new incoming PDFs which need to be processed.

DocumentBurster™ Server is usually purchased by companies which need to consume and integrate *DocumentBurster™* within their existing CRM or ERP business applications.

DocumentBurster™ Server is a little bit more involving to configure but the installation is done only once on a central server.

A.4. *DocumentBurster™ Portal*

DocumentBurster™ Portal is our *DocumentBurster™* cloud-based managed services solution.

DocumentBurster™ Portal allows our customers to focus on their business, instead of their report building, report generation, document distribution or how to build a mechanism to accept customer payments online. *DocumentBurster™ Portal* is a cloud-hosted web software which, for a fee, can be used to generate and send personalized documents to customers, manage and track documents sent to customers and to (optionally) accept payments online from your customers.

There is no software which you will have to install or configure on your computers in order to use *DocumentBurster™ Portal.* You will instead get a *DocumentBurster™ Portal* user/password account to login and track the distributed documents, check which customers paid and which customers didn't pay yet, send reminders for overdue payments, etc.

You will choose *DocumentBurster™ Portal* for any of the following reasons

- You want to generate and publish web documents for your customers, employees, partners or students

- You need an online mechanism to accept and track payments from your customers

- Your company doesn't have much IT resources but you still need an automated system to send documents to customers and (optionally) accept customer payments

- You want to send documents (i.e. invoices, payslips, statements, etc.) to your customers or employees but you don't have yet the documents layout built. In that case we can "code" the documents for you and we can even customize the reports/documents layout to match the look and feel you require (i.e. logo, brand, headers, footers, colors)

- You just want to get everything done without worrying too much about SQL, databases, network, network admins, configuring Microsoft Exchange email server or Twilio SMS, burst tokens, checking the log files, backuping the data, checking user permissions, writing code and programming reports, modifying PDF report layouts, etc.

A.5. Contact Us

Don't hesitate to contact us for any further enquiries you might have

- Email: `<support@pdfburst.com>`

- Contact Us: *https://www.pdfburst.com/contact.html*

Appendix B. How to Do This and That

B.1. How To Distribute External Reports?

Sometimes it might be required to distribute existing reports which are pre-generated and already contain (only) the relevant data for the intended recipient. Such reports don't require any further splitting but only to be distributed, without any modification, to the proper destination. This destination might be email or any other destination type which is currently supported by *DocumentBurster*™ (e.g. FTP, SFTP, etc.).

DocumentBurster™ can be configured to distribute external/existing documents which do not require splitting.

> ### ⚠ Warning
>
> When distributing external reports *DocumentBurster*™ doesn't perform any splitting so you need to make sure that the reports contain (only) the relevant data for the intended recipients.

B.1.1. Configuration
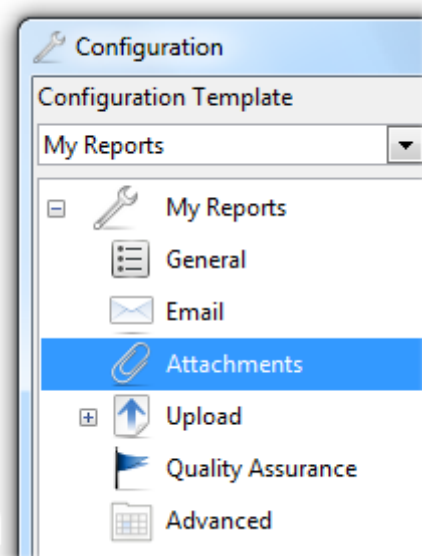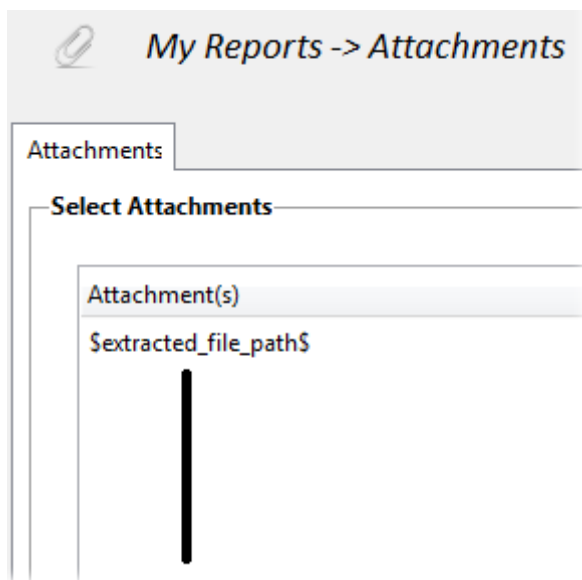
$extracted_file_path$ is the default configuration. This should be changed with a dynamic value to be filled at run-time (e.g. *$var0$* user variable).
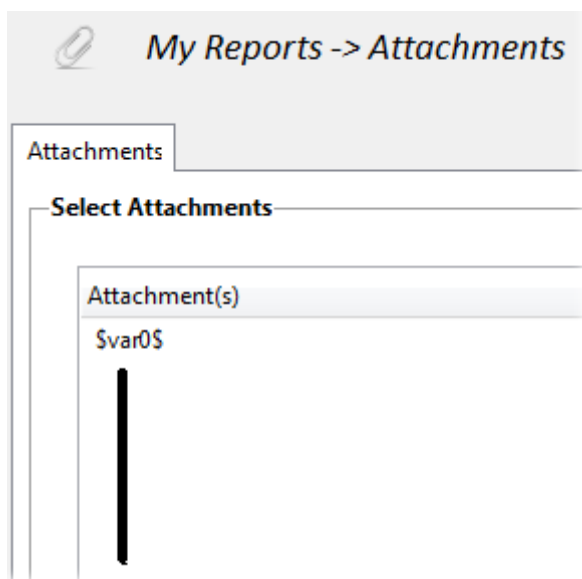
$var0$ should be configured to point to the appropriate document path to be distributed for each recipient. The external documents can be in any format, including PDF, Excel, Word, CSV,Txt, Xml or any other report format.

B.1.2. Recipients List and Document(s) Paths

There are two different ways to configure the recipients list and the path to the document(s) to be distributed to each separate recipient.

- Provide the recipients and the document(s) paths in an Excel sheet

- Provide the recipients and the document(s) paths in a PDF report

> **ℹ Note**
>
> These are two different ways for achieving the same business requirements. The alternative which is best fitting the needs should be used.

B.1.2.1. Provide the recipients and the document(s) paths in an Excel sheet

When using Excel for configuration

- Recipients list can be provided using the *(*)burstTokens* column from the metadata *burst* sheet

- The paths to the document(s) to be distributed can be provided using user variables, more specifically using the *userVariables* column from the metadata *burst* sheet. For example, mapping *$var0$* user variable to the path of the document to be distributed, it is possible to distribute a separate report to each distinct recipient/burst token.

Check the existing sample report `samples/Distribute-External-Files.xls` which can be found in `samples` folder. `Distribute-External-Files.xls` report contains a list of recipients together with the relevant report to be distributed to each one of them.

D	E
(*)burstTokens	**userVariables**
clyde.grew@northridgehealth.org	<0>samples/Invoices-Oct.pdf</0>
kyle.butford@northridgehealth.org	<0>samples/Invoices-Nov.pdf</0>
alfreda.waldback@northridgehealth.	<0>samples/Invoices-Dec.pdf</0>
Recipients list is provided using the *(*)burstTokens* column	The path of the documents is dynamically configured using the *$var0$* user variable

The document paths are dynamically mapped using the *$var0$* user variable. In this sample

- *clyde.grew@northridgehealth.org* will receive by email `samples/Invoices-Oct.pdf` ,

- *kyle.butford@northridgehealth.org* will get `samples/Invoices-Nov.pdf` and

- *alfreda.waldback@northridgehealth.org* will get `samples/Invoices-Dec.pdf.`

> ### Fetch recipients list from other data sources
>
> If required, using Excel, it should be possible to fetch the recipients list and the document(s) paths from other data sources.
>
> Excel has the capability to connect and fetch data from various data sources including SQL Server, Oracle, Microsoft Access, MySQL and most of the existing database types. Using Excel it is also possible to fetch data from existing Xml, CSV, Txt or other Excel reports.
>
> For more details on how to use Excel to connect to an external data source, please consult the official Microsoft Excel documentation.

B.1.2.2. Provide the recipients list and the document(s) paths in a PDF report

As an alternative to Excel, it is also possible to provide the recipients and the document(s) paths in a PDF report. This might be convenient when there is already in place an automated PDF based reporting system which can generate the recipients list.

The PDF report should contain one distinct page for each intended recipient and each page should contain all the details required for the specific recipient (including the path(s) to the document(s) to be distributed).

Check the existing sample report `samples/Distribute-External-Files.pdf` which can be found in `samples` folder. `Distribute-External-Files.pdf` report has three pages, each page containing the path to the document to be distributed to the corresponding recipient

- *clyde.grew@northridgehealth.org* ,

- *kyle.butford@northridgehealth.org* and

- *alfreda.waldback@northridgehealth.org*

B.2. How To Implement Conditional Report Distribution?

Using *DocumentBurster*™ it is possible to implement *conditional report delivery* . While bursting the reports, *DocumentBurster*™ can check and can distribute only those reports which fail to meet a specified user defined condition and can be configured to skip the delivery for the reports which meet the condition.

Use case example

DocumentBurster™ can be deployed and can be easily configured to act as a *management by exception* reporting system which will alert the management team only for the cases where the minimum performance levels are not met.

For example, the management of your organization might require for getting each morning only the reports for the sales with very low profit margins or for the transactions with deviations from the approved discounts.

Configuration

By default, if configured to distribute reports, *DocumentBurster*™ will deliver to the relevant recipients all reports which are being generated during the bursting process. The default behavior can be changed, and *DocumentBurster*™ can be configured to skip the report distribution, by placing a text which has the pattern similar with *<skip>true</skip>* in each of the output documents which should be skipped for report distribution.

> **Note**
>
> The same result can be achieved by using the shorter (while being less expressive) pattern *<s>true</s>.*

If configured to distribute reports, *DocumentBurster*™ will distribute to the relevant recipients all the reports which are being generated during the bursting process and for which *DocumentBurster*™ :

- Is not able to find any explicit positive skip instruction like *<skip>true</skip>(or <s>true</s>)* which have the meaning to skip the distribution for the current report

- Finds an explicit negative skip instruction like *<skip>false</skip>(or <s>false</s>)* which have the meaning to distribute the current report

- Doesn't find any (positive or negative) skip instruction

> **Important**
>
> Depending on the requirements, the report writer software should properly fill the appropriate *<skip>true/false</skip>* tags into the reports which needs to be burst and distributed. Usually the value *(true/false)* from within the *<skip>true/false</skip>* instruction tags will be calculated by a formula defined in the report writer engine and having a business meaning such as:
>
> - Very low profit margins
>
> - Discounts higher than the maximum approved ones

- Low inventory levels

- Production runs with very high scrap rates

- Any other formula which makes business sense for your organization

B.2.1. skip_current_file_distribution_if.groovy

This sample script can be used to achieve complex *conditional report delivery* scenarios.

DocumentBurster™ 's built-in capabilities (skip instruction) can be used to achieve many conditional distribution scenarios while this sample script `(scripts/burst/samples/ skip_current_file_distribution_if.groovy)` should be used for achieving the remaining and more complex situations which cannot be easily implemented using the built-in *skip* instruction approach.

This sample script can be used to achieve *conditional report distribution* in situations similar with the following

- The condition to skip the distribution cannot be achieved using a *skip* report formula (e.g. skip the delivery for files which are bigger than 20MB)

- The condition to skip the distribution is too complex and it might be more convenient to describe this condition in scripting than with a *skip* report formula

- The input report cannot be modified (for whatever reason) to accommodate any *skip* instruction

`skip_current_file_distribution_if.groovy` approach is described in detail in *skip_current_file_distribution_if.groovy* [https://www.pdfburst.com/docs/html/advanced/ chapter.scripting.html#skip_current_file_distribution_if.groovy] from *DocumentBurster*™ - *Advanced Report Delivery Scenarios.*

Appendix C. SharePoint Report Delivery

DocumentBurster™ can be used to deliver reports to Microsoft SharePoint portals.

Microsoft SharePoint is a good document management system which has the following document related capabilities:

- Store, organize, and locate documents

- Ensure the consistency of documents

- Manage metadata for documents

- Help protect documents from unauthorized access or use

- Ensure consistent business processes (workflows) for how documents are handled

DocumentBurster™ is usually used together with SharePoint in order to solve the following business situations:

- For connecting two important systems of any organization, the reporting system and the document management system (i.e. SharePoint).

- For publishing relevant reports to be accessible by clients, employees, etc. through the web. Think to the situation where you have few hundreds or thousands of customers or dealers and, with a single click, you can make the relevant individual reports to be available to each one of them on the portal.

Following paragraphs will describe how to configure *DocumentBurster*™ in order to burst and deliver reports to Microsoft SharePoint portal.

C.1. Distribute Reports to SharePoint by Email

The simplest way to upload reports to SharePoint is through *DocumentBurster*™ 's email distribution capability. *DocumentBurster*™ email configuration is described in *Section 3.3, "Distribute Reports by Email"* .

From *DocumentBurster*™ 's point of view, email configuration is exactly the same regardless if the email destinations are normal email addresses or are SharePoint enabled email addresses.

Microsoft SharePoint should be properly configured (by a SharePoint administrator) in order to accept *inbound emails.*

C.1.1. SharePoint Configuration

It is out of the scope of this manual to give full details about SharePoint inbound email configuration. The official Microsoft SharePoint documentation together with the many existing SharePoint books are the places to look for complete documentation.

Instead, this manual will give hints and will further refer to the official documentation for the topics which are of interest when it comes to SharePoint and *DocumentBurster*™ integration.

Following are the main configuration points in regards with SharePoint inbound email:

- Install and configure the SMTP service

- Configure incoming e-mail settings

- Configure incoming e-mail on SharePoint sites

The inbound email configuration should be similar for both SharePoint 2007 and SharePoint 2010 and for detailed configuration the official SharePoint documentation should be consulted.

C.1.1.1. SharePoint 2007 Resources

Following are some help resources for SharePoint 2007 inbound e-mail configuration:

- *Plan incoming e-mail (Windows SharePoint Services)* [http://technet.microsoft.com/en-us/library/cc288433%28office.12%29.aspx]

- *Configure incoming e-mail settings (Windows SharePoint Services)* [http://technet.microsoft.com/en-us/library/cc287879%28office.12%29.aspx]

- *Enable and configure e-mail support for a list or library* [http://office.microsoft.com/en-us/sharepoint-server-help/enable-and-configure-e-mail-support-for-a-list-or-library-HA010082307.aspx?pid=CH101237651033]

- *Demo: Configure a SharePoint Server 2007 site to receive e-mail* [http://office.microsoft.com/en-us/sharepoint-server-help/demo-configure-a-sharepoint-server-2007-site-to-receive-e-mail-HA010204792.aspx]

C.1.1.2. SharePoint 2010 Resources

Following are few SharePoint 2010 help resources related with inbound email configuration:

- *Plan incoming e-mail (SharePoint Foundation 2010)* [http://technet.microsoft.com/en-us/library/cc288433.aspx]

- *Configure incoming e-mail (SharePoint Foundation 2010)* [http://technet.microsoft.com/en-us/library/cc287879.aspx]

C.1.2. Sample - Burst `samples/Payslips.pdf` Report to SharePoint 2007

This example shows how to distribute reports to a WSS3.0 - SharePoint 2007 portal which is installed on Windows Server 2003.

While bursting `samples/Payslips.pdf` report, *DocumentBurster*™ will generate three output reports

- `alfreda.waldback@northridgehealth.org.pdf,`

- `clyde.grew@northridgehealth.org.pdf`

- `kyle.butford@northridgehealth.org.pdf`

which will be delivered to SharePoint's 2007 default `Shared Documents` document library folder.

Following configuration steps are presented with the help of few screenshots

- Step 1. *Control Panel* - Double check that the SMTP service is properly configured and enabled

- Step 2. *SharePoint Central Administration* - Configure incoming e-mail settings

- Step 3. *SharePoint specific site/library folder* - Configure incoming e-mail on SharePoint sites

- Step 4. Configure *DocumentBurster*™

- Step 5. Burst `samples/Payslips.pdf`

Procedure C.1. Sample - Burst `samples/Payslips.pdf` Report to SharePoint 2007

1.   *Control Panel* - Double check that the SMTP service is properly configured and enabled
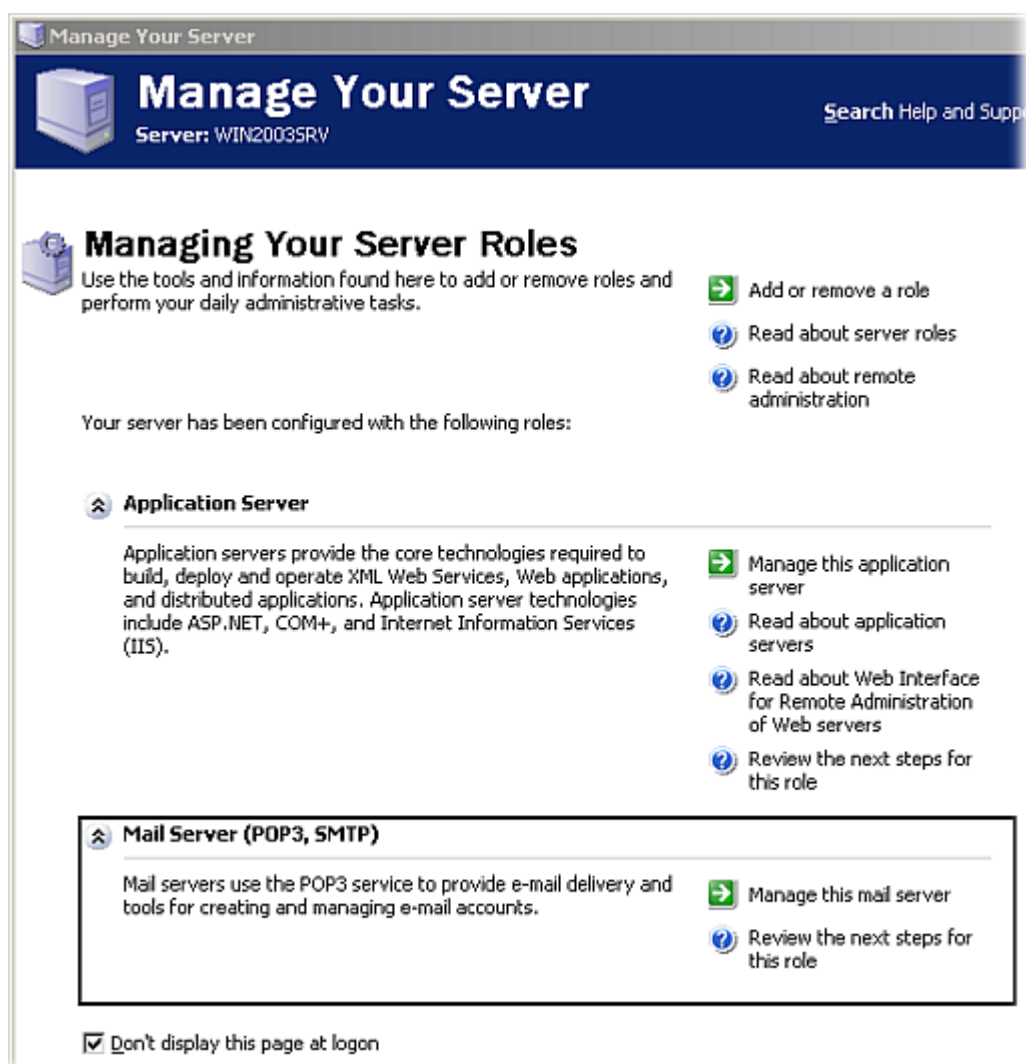
It is OK, SMTP service is available under **Start** → **Control Panel** → **Administrative Tools** → **Manage Your Server**

2. *SharePoint Central Administration* - Configure incoming e-mail settings

For this simple demonstration the incoming email is configured in *SharePoint Central Administration* as being *Automatic.* This configuration is done in **Start** → **Control Panel** → **Administrative Tools** → **SharePoint 3.0 Central Administration**

On the bottom of the same screen (SharePoint Central Administration screen) , provide an **E-mail server display address** and select **Accept e-mail from all email servers**

3. *SharePoint specific site/library folder -* Configure incoming e-mail on SharePoint sites
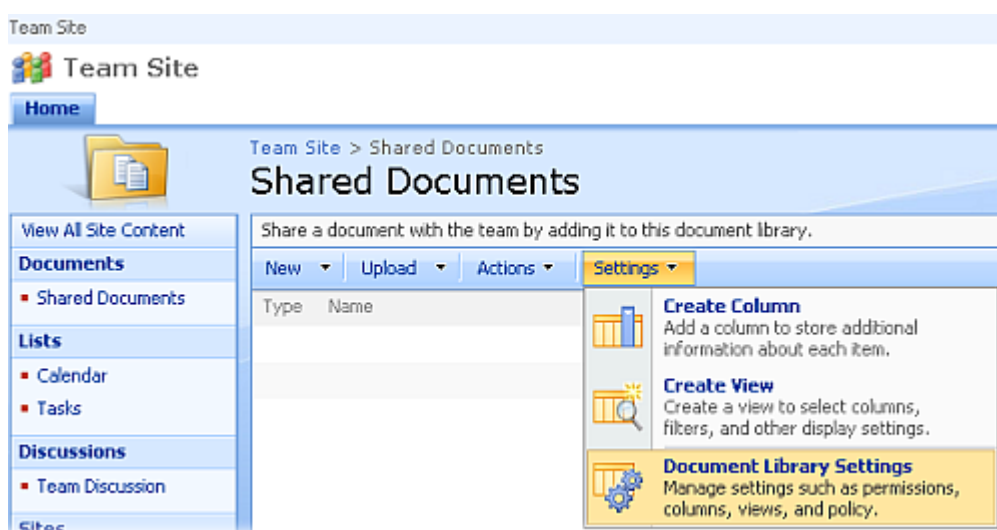
For the specific document library of interest, enable the incoming e-mail

4.   Configure *DocumentBurster*™

Configuring *DocumentBurster*™ email for distributing reports to SharePoint isn't different than the usual *DocumentBurster*™ email configuration
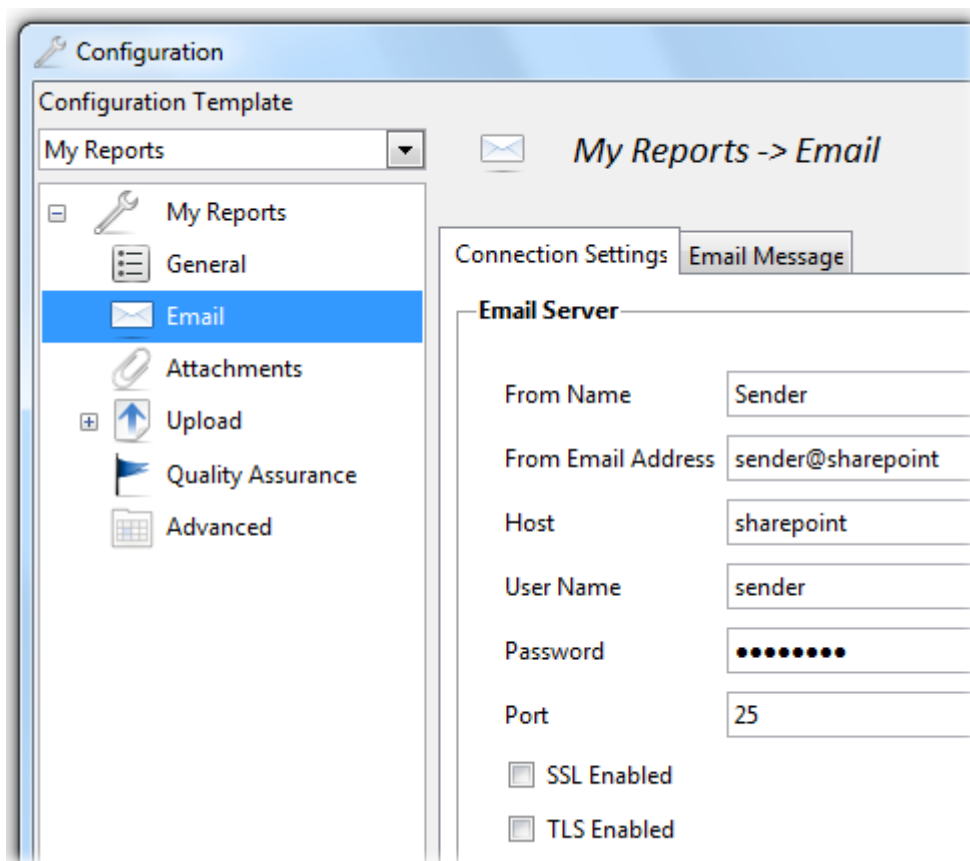
documentburster@sharepoint email address was previously defined in SharePoint as being the email address of *Shared Folders* document library
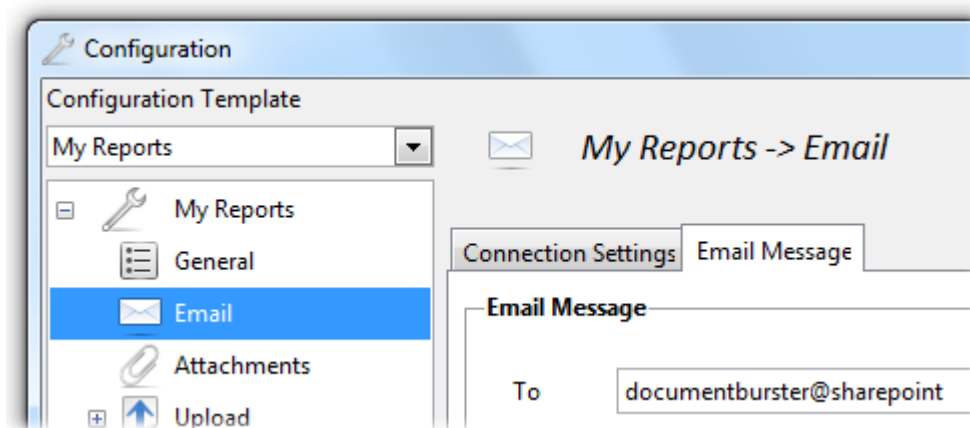
5. Burst the sample report
   Double check that the email distribution is enabled

Burst File Name		$burst_token$.$input_document_extension$
Default Merge File Name		merged.pdf
Output Folder		output/$input_document_name$/$now;format="yyyy.MM
Backup Folder		backup/$input_document_name$/$now;format="yyyy.MM
Quarantine Folder		quarantine/$input_document_name$/$now;format="yyyy
(should be a local folder)		
Poll Folder		poll
(should be an existing local folder)		

☑ Distribute reports to Email, FTP ...

☐ Delete reports once they are distributed

☑ Quarantine reports which fail to be distributed

Select and burst `samples/Payslips.pdf` report

PDF/Excel File Path samples\Payslips.pdf [Select]

[Burst] [View Generated Reports]

Distribute reports to Email, FTP ...

~~Delete reports once they are distributed~~

Quarantine reports which fail to be distributed

Are you sure you want to post another job?

[Yes] [No]
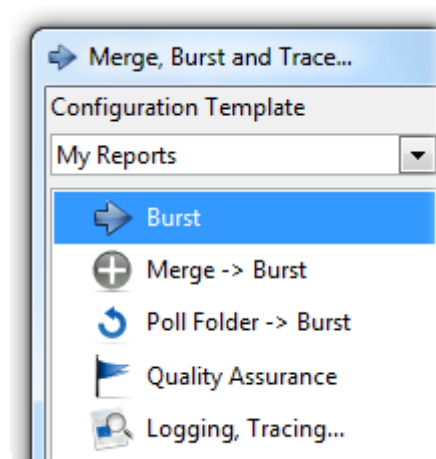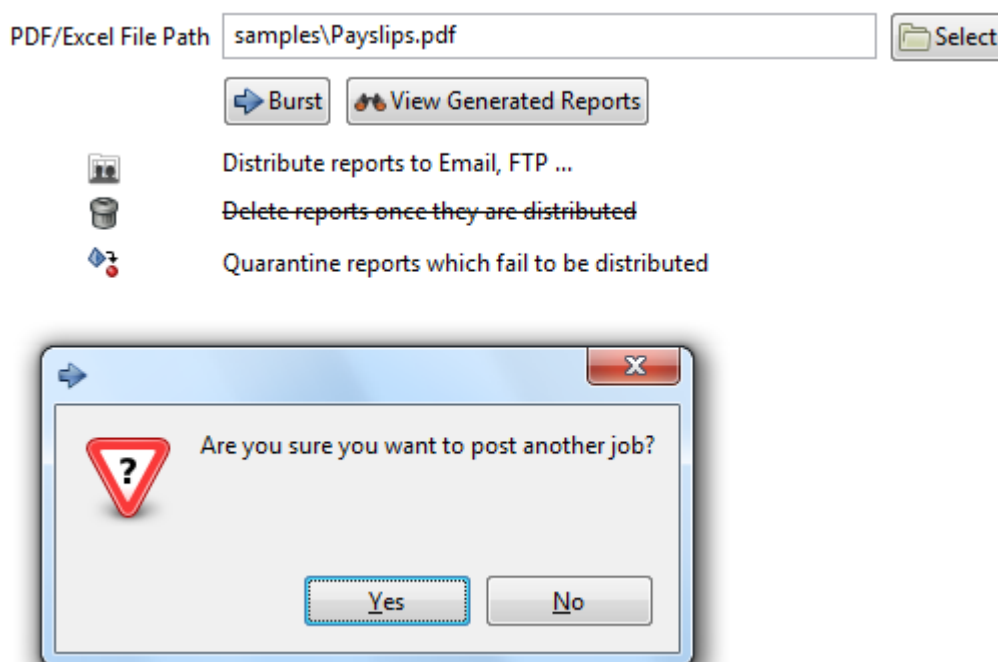
The output burst reports are uploaded to SharePoint

Team Site

Team Site

Home

Team Site > Shared Documents

Shared Documents

Share a document with the team by adding it to this document library.

View All Site Content

Documents
- Shared Documents

New ▾ Upload ▾ Actions ▾ Settings ▾

Type Name

Lists
- Calendar
- Tasks

alfreda.waldback@northridgehealth.org ! NEW

clyde.grew@northridgehealth.org ! NEW

kyle.butford@northridgehealth.org ! NEW

Discussions
- Team Discussion

Sites

People and Groups

Recycle Bin

C.1.2.1. Email Address Validation

The last thing to be mentioned is about how *DocumentBurster*™ is validating email addresses.
This is particularly important to be noted here because, if the above steps are followed exactly,

then *DocumentBurster*™ will not distribute any document to SharePoint. *DocumentBurster*™ will display, in the log file, a message similar with

Invalid email address 'documentburster@sharepoint' found! Do you need to use local email addresses like 'documentburster@win2003srv'? If so, defining the 'allowLocalEmailAddresses' configuration with the value 'true' will allow to send emails to local email addresses!"

In the default configuration *DocumentBurster*™ is validating all the email addresses to be in the format *string@otherstring.ext* and will throw the above exception for any address which is not in this format (i.e. *documentburster@sharepoint).*

Selecting the *Allow email addresses with local domain name and no TLD (e.g. documentburster@sharepoint, admin@mailserver1)* configuration will make the test to pass for *documentburster@sharepoint* email address and thus the output reports will be delivered to this SharePoint address.

In *DocumentBurster*™ main window select **Actions → Configure → Advanced**

☑ Allow email addresses with local domain name and no TLD
(e.g. documentburster@sharepoint, admin@mailserver1)

> **Note**
>
> If required, your organization's SharePoint administrator should be able to give further help in configuring the system.

Appendix D. Performance

The first part of this chapter presents a general picture about report distribution performance and some high level performance guidelines for getting an increased throughput from the *DocumentBurster*™ software.

The last section shows a simple, yet powerful, *DocumentBurster*™ tool for monitoring various report bursting and report delivery performance metrics.

D.1. Performance Guidelines - Getting the Most From Your *DocumentBurster*™ System

DocumentBurster™ hardware requirements will depend on the volume and the size of the reports which the system is expected to process and distribute. The system can scale in order to support the most demanding report distribution performance requirements.

In most of the situations, *DocumentBurster*™ should perform well enough on any low-end machine which can decently run Windows XP. However, if your enterprise organization is expected to process really huge reports, it is advisable to allocate a dedicated and powerful machine.

Following are the hardware devices which have an influence on the overall system throughput

- *Network performance* - The quality of network and the size of the files transferred will have a considerable impact on the report distribution throughput. A good network bandwidth together with low network latency will have a positive impact when distributing a lot of reports by either email or other network based protocols.

- *CPU, Disk I/O performance* - More CPU power together with a good Disk I/O performance will improve the report bursting/separation throughput. *DocumentBurster*™ will benefit when running on a modern multi-core server machine.

- *Memory* - By default, *DocumentBurster*™ starts with 128MB and *DocumentBurster*™ *Server* starts with 256MB. The default memory configuration should be enough when processing really big reports (thousands of pages) and, if required, the memory can be further increased in order to process even bigger reports.

D.1.1. Minimize the network overhead

The most common scenario will be for *DocumentBurster*™ to distribute the reports by email. When a big number of reports is required to be distributed in a short period of time, deploying *DocumentBurster*™ software on the same physical machine with the email server (e.g. Microsoft Exchange) will mostly save the network overhead and will be like a boost for the overall report distribution throughput.

If possible, for email distribution performance reasons, install *DocumentBurster*™ on the same computer with the email server software (e.g. Microsoft Exchange).

D.1.2. Minimize intermediate layers

Any intermediate layer which sits in-between *DocumentBurster*™ and the email server software will pose a performance penalty when the reports are being distributed. For example, a common situation will be with various antivirus/firewall (e.g. Symantec, McAfee) kind of software which might monitor the network transfer from *DocumentBurster*™ to the email server (e.g. Microsoft Exchange). Such intermediate layers will slow down the network performance and, if email sending performance is a critical requirement, the IT administrator of your organization should check for various approaches to minimize the performance cost of these intermediate layers. The simplest approach would be to decide that all the emails which are sent by *DocumentBurster*™ are legitimate and do not require additional validation. Another approach might be to configure the antivirus software to do the minimum amount of scanning necessary to meet the security requirements from your organization.

D.1.3. Running *DocumentBurster*™ in a virtual machine

DocumentBurster™ can be deployed and used in a virtual machine. The software is confirmed to run in Oracle VM VirtualBox and Microsoft Hyper-V and should work properly on other virtualization software too. Like any other software, there is a performance penalty when running *DocumentBurster*™ in a virtual machine as compared with running the software in a native operating system. The network quality, the CPU, Disk I/O and memory performance are the factors which influence the total throughput of the *DocumentBurster*™ software when running inside a virtual machine.

D.2. Performance Monitoring

DocumentBurster™ has a simple, yet powerful, mechanism to monitor various report bursting and report distribution performance metrics. This mechanism can be enabled for tracking, on an ongoing basis, the report bursting and report distribution performance during production.

DocumentBurster™ monitoring system displays the most relevant report bursting and report distribution performance indicators with the help of various graphs which are easy to understand and visualize.

Further more, *DocumentBurster*™ is publishing the performance metrics in two additional ways which can be used when integrating with professional monitoring tools

- *Log file* - *DocumentBurster*™ generates a relatively simple to read (and simple to parse) log file which contains aggregated performance statistics. When compared with the graphs, the log file contains a bigger set of performance metrics (at the cost of being less easy to read) and, if required, can be automatically polled and parsed for raw performance data by other third party monitoring tools.

- *JMX* - *DocumentBurster*™ exposes performance metrics through JMX so that monitors can be set up to alert when performance degrades below acceptable thresholds. Since JMX has become the standard interface for managing and monitoring Java applications, exposing

DocumentBurster™ performance data through JMX opens up a wide range of functionality provided by third party monitoring applications.

D.2.1. Enable Performance Monitoring

In the default installation, *DocumentBurster*™ does not gather any performance related data. If performance monitoring is required, then *DocumentBurster*™ should be configured to gather, calculate and publish the performance statistics.

D.2.1.1. *DocumentBurster*™

DocumentBurster™ can be enabled to publish performance metrics by doing the modification which is marked as bold to the first line of `config/burst/internal/documentburster.xml` configuration file.

- existing value - *<project name="documentburster" default="documentburster">*

- new value - see the bold change *<project name="documentburster" default=" **performance-statistics">***

D.2.1.2. *DocumentBurster*™ *Server*

DocumentBurster™ *Server* can be enabled to publish performance metrics by doing the modification which is marked as bold to the first line of `server/config/burst/internal/startServer.xml` configuration file.

- existing value - *<project name="server" default="start-server">*

- new value - see the bold change *<project name="server" default=" **performance-statistics">***

Save the configuration file(s) and run *DocumentBurster*™ again. Now, everytime a report is being processed, performance metrics will be published in the following two files

- `logs/performance/statistics.log` - contains the aggregated performance statistics calculated at regular time intervals (10 seconds by default)

- `logs/performance/graphs.log` - contains *Google Chart Tools* URLs with *DocumentBurster*™ performance charts

    https://developers.google.com/chart/?csw=1

D.2.2. Built-in *DocumentBurster*™ Performance Monitoring

D.2.2.1. Performance Statistics Log File

If configured as such, *DocumentBurster*™ will gather run-time performance statistics. The data is collected throughout the program execution and regularly, at a configurable time interval (10 seconds by default) the raw data is processed to produce and log aggregated statistics such as mean, minimum, maximum, standard deviation and transactions per second over a set time

span. If monitoring is enabled, the aggregated statistics will be available in `logs/performance/statistics.log` log file.

Example of performance statistics log file

```
Performance Statistics   2011-10-27 17:40:20 - 2011-10-27 17:40:30
Tag                              Avg(ms) Min  Max  Std Dev Count
executeScript_endParsePage.groovy    0.4   0    1    0.5     643
executeScript_startParsePage.groovy  0.3   0    1    0.4     643
processPage                         14.8   4   27    7.5     643
```

D.2.2.2. Performance Graphs

If monitoring is enabled, *DocumentBurster*™ will generate graphs for the average execution time and transactions per second for the following transaction types

- *processPage* - transaction which is parsing the text of one page of the report for burst tokens and variable values.

- *extractOutputFile* - transaction which is extracting a separate burst report.

- *send* - transaction which is distributing the previously extracted report.

The graphs are generated as URLs to Google Chart Server in `logs/performance/graphs.log` log file.

Mean Execution Times (ms)
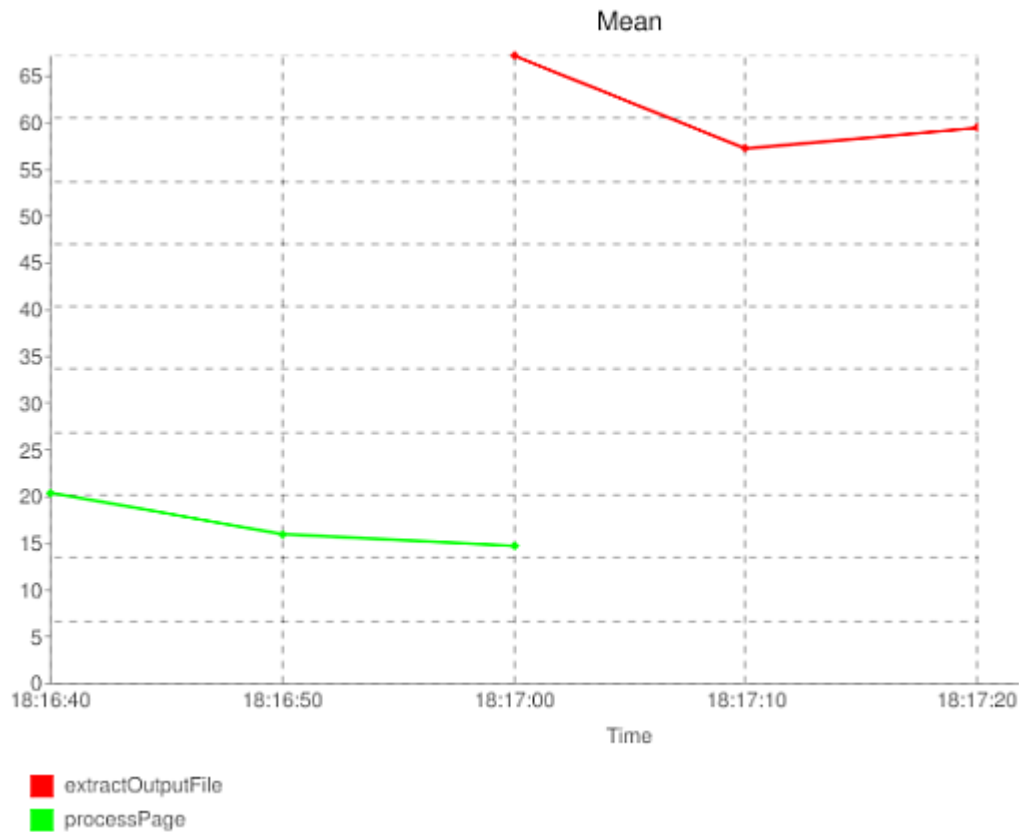
Transactions Per Second

D.2.2.3. Exposing Performance Statistics as JMX Attributes

If performance monitoring is enabled, *DocumentBurster*™ does expose the performance data using the JMX standard. Exposing *DocumentBurster*™ performance data using JMX opens up a wide range of functionality, such as:

- *DocumentBurster*™ performance metrics can be visualized using existing Java JMX consoles like JConsole or MC4J Management Console.

- Through JMX, *DocumentBurster*™ has the premises to be monitored using professional network monitoring software like Nagios or OpenNMS.

Visualize report bursting and report distribution performance metrics using JConsole
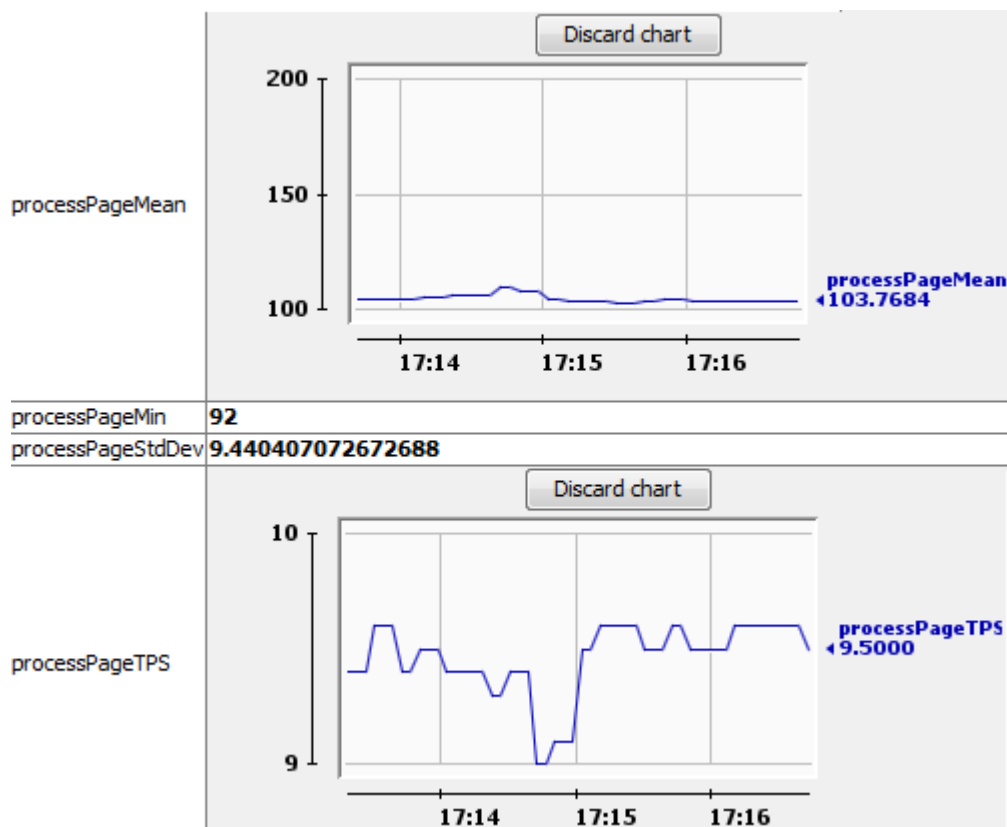
D.2.3. Integration with Professional Third Party Monitoring Tools

If required, for more advanced monitoring scenarios, *DocumentBurster*™ has the technical premises to be integrated with other professional monitoring tools. Such an advanced monitoring tool will allow, for example, to define performance thresholds on *DocumentBurster*™ metrics and to raise an alert whenever the minimum performance thresholds are not met. Once raised, the alert can be either displayed in a monitoring dashboard using red color or can be sent by email to one or more configured email addresses.

While *DocumentBurster*™ *'s* monitoring system is not directly dependent on any, it can be integrated with most of the existing network monitoring platforms such as Nagios, Cacti, Hyperic, Zenoss, SpiceWorks, GroundWork, Zabbix or OpenNMS. If the IT department of your organization has already standardized on using an existing platform for doing system monitoring then it should be possible to add *DocumentBurster*™ to the list of applications which are closely monitored.

The documentation of the selected monitoring vendor should be consulted in order to find details on how to define and monitor a new application. In general, such tools will allow to fetch the required *DocumentBurster*™ performance data by either

- Constantly polling and parsing of the raw *DocumentBurster*™ performance log file - `logs/performance/statistics.log` for the required data.

- By using a JMX adaptor (provided by the third party tool), remotely connect and read the performance data which is exposed by *DocumentBurster*™ using JMX.

D.3. Further Reading

- *Google Chart Tools -* *DocumentBurster*™ is displaying the performance charts using *Google Charts* [https://developers.google.com/chart/?csw=1]

- *JMX -* *DocumentBurster*™ exposes performance metrics through *JMX* [http://en.wikipedia.org/wiki/Java_Management_Extensions]

- *JConsole -* *DocumentBurster*™ can be monitored using *JConsole* [http://en.wikipedia.org/wiki/JConsole]

- *Nagios documentation -* general documentation useful when monitoring *DocumentBurster*™ through *Nagios* [http://www.nagios.org/documentation]

- *Cacti documentation -* general docs useful when using *Cacti* [http://www.cacti.net/documentation.php]

- *Hyperic HQ documentation - Hyperic HQ* [http://www.hyperic.com/support/systems-monitoring-doc]

- *Zenoss documentation - Zenoss* [http://www.zenoss.com/resources/docs]

- *Spiceworks - Spiceworks* [http://www.spiceworks.com/free-network-monitoring-management-software/]

- *GroundWork - network and application monitoring software - GroundWork* [http://www.gwos.com/]

- *Zabbix - Monitoring software - Zabbix* [http://www.zabbix.com/]

- *OpenNMS - Monitoring software - OpenNMS* [http://www.opennms.org/]

Appendix E. Troubleshooting

E.1. Overview

This section provides troubleshooting information for common *DocumentBurster*™ difficulties.

If you are experiencing problems using *DocumentBurster*™ make sure that you have read and properly installed the software prerequisites, as described in *DocumentBurster*™ *in 5 Minutes* [https://www.pdfburst.com/docs/html/quickstart/index.html] tutorial guide.

E.1.1. Quick & Professional Support

If you need to contact *DocumentBurster*™ support, you can get help by sending an email to `<support@pdfburst.com>`

E.2. Common Problems

E.2.1. I Get Only 25 Reports

The free version of *DocumentBurster*™ has a *restriction of maximum 25 burst output reports* being generated and/or being distributed.

For bursting and generating an unlimited number of reports please purchase *DocumentBurster*™

https://www.pdfburst.com/purchase.html

E.2.2. Issues Running Basic Features?

If you don't know from where to start or you have problems running the basic features of the program, read *DocumentBurster*™ *in 5 Minutes* [https://www.pdfburst.com/docs/html/quickstart/index.html] tutorial guide.

E.2.3. UnsupportedClassVersionError Exception?

If on the console or log file there is an exception similar with

"java.lang.UnsupportedClassVersionError:test (unsupported major.minor version 49.0)

This is happening when the program runs with an ancient java version (<Java v1.8). Read *DocumentBurster*™ *in 5 Minutes* [https://www.pdfburst.com/docs/html/quickstart/index.html#software.prerequisites] document and double check the version of `java` which is installed on your computer.

DocumentBurster™ requires Java v1.8 (or greater) version in order to run.

Sometimes the exception is still coming even after the latest Java is installed. This is happening because the old java is still installed and active on your computer.

The solution is to edit `documentburster.bat` and do the following change

java -Djava.endorsed.dirs=./lib/endorsed -cp ./lib/burst/ant-launcher.jar org.apache.tools.ant.launch.Launcher -buildfile ./config/burst/documentburster.xml -Darg1=%1 -Darg2=%2 -Darg3=%3 -Darg4=%4 -Darg5=%5 -Darg6=%6

Do the **bold** change

"C:/Program Files/Java/jre8/bin/java.exe" -Djava.endorsed.dirs=./lib/endorsed -cp ./lib/burst/ant-launcher.jar org.apache.tools.ant.launch.Launcher -buildfile ./config/burst/documentburster.xml -Darg1=%1 -Darg2=%2 -Darg3=%3 -Darg4=%4 -Darg5=%5 -Darg6=%6

The proper path to the location where the latest java is installed should be provided. This change will force *DocumentBurster*™ to run with the latest java.

E.2.4. Mess With Multiple Java Installations

As a general rule, it is advisable to have a single Java installation on the machine where *DocumentBurster*™ is executed. Even if (theoretically) it is possible to have multiple java versions installed on the same computer, in practice this will only leave room for strange issues and will complicate the installation.

E.2.5. Burst Issue 1

If you have bursting problems, check that you have configured the burst tokens in-between brackets. For example *{alfreda.waldback@northridgehealth.org}* is a valid token.

E.2.6. Burst Issue 2

If you configured all the tokens properly and still the program is not working as expected, you can enable detailed logging. By checking the detailed log file you can understand what is going wrong.

In order to enable detailed logging, read *Chapter 7, Quality Assurance* .

E.2.7. Variable Values Are Not Parsed Correctly?

Sometimes variables defined like *<0>some value</0>* and up to *<9>some other value</9>* might fail in getting parsed the proper values. Following is an example of the issue coming with Microsoft Access, while similar behavior might be observed with other report writers too.

The Problem - Example of the problem coming with Microsoft Access

I am using various MS Access reports to grab variable data using <0> text </0> . If I use a label for the text and key it into the text box as <0> report id 100 </0> it works fine but if I drop a field onto the report and then put the <0> and </0> in front and back of the field, it does not work.

The Solution - And here is the solution for the previous MS Access behavior

When you drop the fields into an MS Access report you need to define any field you use as a variable as a single field by concatenation. For example, let's say I have a field named "date" and

place it on the report with a text box of <0> in front and then place a text box of </0> at the end. This will not work. You need to create one field (object) as follows: =" <0> "text" </0> ". Now it will work.

More Details

If the start and end tags (e.g. *<0>* and *</0>*) are statically defined, while the content inside is a dynamic field /report formula (string value which can grow in length), the dynamic content will grow and will start to overlap with the static tags (e.g. *<0>* and *</0>).* This might cause problems when *DocumentBurster™* is parsing the variable values. See the following screenshot in which "Tuesday" hidden text was generated by a date field/formula which expanded its length and started to overlap the start *<1>* tag. In this case the text which is extracted by *DocumentBurster™* is a messy *Tues<da1>y* and as a result the variable value is not properly parsed. The solution to this problem was described in the previous paragraph.
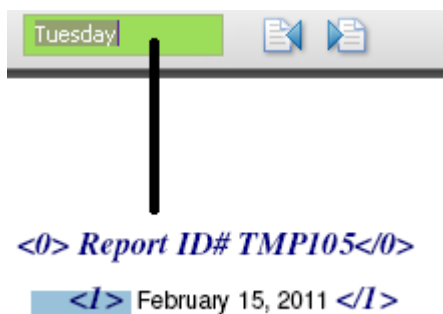
E.2.8. Windows - *DocumentBurster™ Server* Is Failing to Start?

When `server/startServer.bat` script is executed it is flashing up the cmd box and then it disappears.

Solution

- Are all the prerequisites in place? Read *DocumentBurster™ in 5 Minutes* [https://www.pdfburst.com/docs/html/quickstart/index.html#software.prerequisites] tutorial guide and check all the prerequisites required for running *DocumentBurster™* .

- *DocumentBurster™* should run on Java version v1.8 or greater (`java -version` MS-DOS command should return v1.8 or greater)

- If required, start the server again. Did you shut the server properly from previous runs by using `server/shutServer.bat` script?

E.2.9. Windows - *DocumentBurster™ Server* Is Not Processing the Web Console Jobs?

Solution

- Are all the prerequisites in place? Read the *DocumentBurster™ in 5 Minutes* [https:// www.pdfburst.com/docs/html/quickstart/index.html#software.prerequisites] tutorial guide and check all the required prerequisites.

- *DocumentBurster™* should run on Java version v1.8 or greater (`java -version` MS-DOS command should return v1.8 or greater)

E.2.10. Windows - *DocumentBurster™* Web Console Is Failing to Start?

The link *http://localhost:8080/burst* is not working on the local machine. When `web-console/ startConsole.bat` script is executed it is flashing up the cmd box then it disappears.

Solution

- Are all the prerequisites in place? Read *DocumentBurster™ in 5 Minutes* [https:// www.pdfburst.com/docs/html/quickstart/index.html#software.prerequisites] tutorial guide and check all the required prerequisites.

- *DocumentBurster™* should run on Java version v1.8 or greater (`java -version` MS-DOS command should return v1.8 or greater)

- Was *DocumentBurster™ Server* console started before, using `server/startServer.bat` script? *DocumentBurster™ Server* console should be started before the web console is started.

- Before starting the web console *JRE_HOME* environment variable should be properly defined on your system. The *echo %JRE_HOME%* command executed in the DOS command prompt should return an existing JRE 1.8 (or greater) installation path.

  If required, on Windows, *JRE_HOME* environment variable can be manually defined in **Control Panel** → **System Properties (WinKey + Pause)** → **Advanced** → **Environment Variables** i.e. `C:/Program Files/Java/jre8`

E.2.11. Windows Service Stops on Windows Server 2003?

The following problem is happening only on Windows Server 2003.

The system was tested and everything works fine on Windows Server 2008 or Windows 7.

The Problem - *DocumentBurster™ Server* service always stops when the system is logged off.

Solution

This is required only for Windows Server 2003.

Before doing any change make sure that

- Both *DocumentBurster™ Web Console* and *DocumentBurster™ Server* Windows services are stopped

- Both *DocumentBurster*™ *Web Console* and *DocumentBurster*™ *Server* are properly shut down using the corresponding `shutConsole.bat` and `shutServer.bat` scripts

`-Xrs` switch should be added in two (2) places

- `server/startServer.bat`

- `server/config/burst/internal/documentburster.properties`

Change 1 `server/startServer.bat`

java -DDOCUMENTBURSTER_HOME=%CD% -Djava.endorsed.dirs=lib/endorsed -cp lib/
batch/ant-launcher.jar org.apache.tools.ant.launch.Launcher -buildfile config/burst/internal/
startServer.xml –emacs

Do the **bold** change

java **-Xrs** -DDOCUMENTBURSTER_HOME=%CD% -Djava.endorsed.dirs=lib/endorsed -cp
lib/batch/ant-launcher.jar org.apache.tools.ant.launch.Launcher -buildfile config/burst/internal/
startServer.xml –emacs

Save the file.

Change 2 `server/config/burst/internal/documentburster.properties`

SERVER_JVM_OPTS=-XX:MaxPermSize=256m -Xms512m -Xmx512m

Do the **bold** change

SERVER_JVM_OPTS= **-Xrs** -XX:MaxPermSize=256m -Xms512m -Xmx512m

Save the file.

Restart both *DocumentBurster*™ Windows services and check that *DocumentBurster*™ works properly when the machine is logged off.

E.2.12. Email Is Failing?

If you have problems in getting the email working

- Double check the email server connection details

- If your organization is using Microsoft Exchange as email server and Microsoft Outlook as email client, in this situation, you will need to give the same email server connection details which are already configured in your Microsoft Outlook email client software.

Are you running Anti-Virus software?

If your organization has any firewall and/or antivirus software (e.g. Symantec, McAfee, etc.) which is configured in between *DocumentBurster*™ software and the email server software (e.g.

Microsoft Exchange), in this case, the antivirus and/or firewall might need to be properly configured to allow *DocumentBurster*™ sending emails as a good and trustable citizen.

Ask for Help

A network or IT administrator from your organization should be able to assist if you find further difficulties in configuring the email settings.

E.2.13. Email Still Fails?

Check the logs on the email server side. If your organization is using Microsoft Exchange as an email server, check the Microsoft Exchange log entries to see if the email server was reached and what problem was encountered.

E.2.14. Email SMTP Error 421

If on the console or log file there is an exception similar with

Caused by: javax.mail.MessagingException: Could not connect to SMTP host: host-here, port: port-here, response: 421

This represents *Email SMTP Error 421* (see the SMTP error code 421 in the exception) and you will need to work together with your IT Network or Microsoft Exchange administrator which should further read and interpret the email server log entries (e.g. Microsoft Exchange logs).

Possible ISP limitation

In addition, you might need to let your ISP know that you have a legitimate reason for sending many emails.

More details about Email SMTP Error 421

SMTP Error 421: The Mail transfer service is unavailable because of a transient event. SMTP reply 421 can be caused by many things but generally indicates that the mail server which returns this status code is currently unavailable but may be available later. For example, the server administrator may have stopped the mail service to troubleshoot a problem, or the mail server is right in the middle of rebooting, or the mail server is currently processing too many incoming messages or incoming requests, etc.... Note : *Mail Server* in this case can be any of the mail servers on the message's route – the sending server (your server), the ISP SMTP server, or the recipient's mail server. Clearly, if you repeatedly receive an SMTP status 421 then the problem is no longer of a transient nature and you need to investigate or inform the relevant network administrator, ISP tech support, or the recipient.

SMTP Response 421 can also be received as a result of your message server sending an email where the total number of TO, CC, and BCC users results in a number of simultaneous SMTP connections that is in excess of the number of connections your ISP or SMTP service allows. A typical error message for this situation would be : *421 Too many concurrent SMTP connections from this IP address; please try again later*. Typically, when this happens your server will have sent

some of the messages (note that for all servers, each email sent by a user always gets broken down into individual separate emails to each of the recipients in the TO, CC, and BCC fields), and will automatically retry a little later to send the remaining messages.

E.2.15. Email SMTP Error 550 5.7.1 Unable to relay

This is how people will usually describe this issue

We are able to burst reports to colleagues with internal email addresses successfully. Our problem is that when we try to send TO or CC to external clients / emails the burst email always fails.

If on the console or log file there is an exception similar with

com.sun.mail.smtp.SMTPAddressFailedException: 550 5.7.1 Unable to relay

In *DocumentBurster™* main window select **Actions → Configure → Email → Connection Settings**

User name field should not be empty. It should be a valid Exchange/NT user name and the user name should be complete, including the network prefix (e.g. EHNET\cjohn).

When sending emails to external addresses, for security/spam reasons, Exchange is more strict and requires people to authenticate. This is not the case when sending emails to internal email addresses. This is the meaning of **550 5.7.1 Unable to relay** Exchange exception.

E.2.16. Few Emails Are Going and Then Email Stops Working

This is how people will usually describe this issue

The first pass ran through fine and files burst into folder – all 187. I then chose to email and burst - the file got through to number 45 or so and then started to fail.

In the `logs/documentburster.log` file there is an exception similar with

java.net.SocketTimeoutException: Read timed out

This is usually happening when the email SMTP server (Exchange?) your organization is using needs some tuning/configuration in order to distribute many emails in a short period of time.

Following possible approaches can be taken in order to solve the situation

- Catch up with your organization's network/Exchange administrator and he (she) should be able to assist with this situation.

- Install *DocumentBurster*™ on the same machine with your SMTP email server. This should eliminate most of the existing network latency.

- Is there any antivirus/firewall kind of software which is sitting in-between *DocumentBurster*™ and Exchange Server? If yes, then you might consider to temporarily disable the antivirus/ firewall software and see if this makes any difference. If this is the problem then your organization's network admin should find the proper firewall configuration which will allow *DocumentBurster*™ to send emails like a good and trust-able citizen (through the firewall).

E.2.17. Email Is Still Failing?

DocumentBurster™ can be configured to log more details about the SMTP communication.

Edit the file

`config/burst/settings.xml`

and do the **bold** change

<emailserver><debug>false</debug></emailserver>

change to

<emailserver><debug> **true** </debug></emailserver>.

Run the program again and check *DocumentBurster*™ log file to see more details about the email SMTP communication.

E.2.18. Upload Issue?

If you have problems in getting the upload functionality to work make sure the upload command is configured properly, as described in *Section 3.5, "Upload Reports"* .

In addition, you might check the `logs/cURL.log` file for further details about any possible upload error.

E.2.19. I messed up with the configuration and now the program is failing. Is it possible to restore the default configuration?

In *DocumentBurster*™ main window select **Actions** → **Configuration Templates**

Select edit for the configuration template which needs to be restored and copy the default values from the `config/burst/default/defaults.xml` existing file.

I messed up with the configuration and now the program is failing. Is it possible to restore the default configuration?

Name	My Reports
	(e.g. Payslips, Invoices, Statements, etc.)
Copy Values From	./config/burst/default/defaults.xml Select
Path	./config/burst/settings.xml
How To Use It	Used when no other configuration templ

Cancel   OK