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Launch Adlib PDF

For users who possess a basic understanding of document transformation and who wish to immediately adopt the Adlib solution, this Quick Start Guide will quickly bring you up to speed. It explains key concepts, introduces basic and commonly used Components, and provides step-by-step procedures. For comprehensive descriptions of all Adlib Components and procedures, refer to the Adlib PDF User Guide.

Adlib PDF is the next generation of Adlib transformation technology. Its design offers a high degree of flexibility for developing systems that provide scalability and high availability. An intuitive, interactive interface enables administrators to set up, configure, and troubleshoot systems that are easily configured to fulfill each user’s unique requirements.

If you would like dedicated support and guidance through the installation process, contact your Adlib sales representative to inquire about Adlib Services.

Installation

1. To install Adlib PDF you must be logged into the system with an account that has Local Administrator rights and perform the installation from the local machine.

2. Ensure that the necessary system requirements are available, including a database tablespace/schema with a corresponding user account.

3. Close all applications.

4. Run the Adlib PDF installation file.

5. Follow the instructions in the Adlib-Installation Wizard to:
   - Accept the End-User License Agreement terms,
   - Enter Customer Information, and
   - Select installation Components.

6. The Transformation Engine must be activated in either evaluation mode or with a license key before jobs can be processed. If you do not wish to activate at this time, the License Manager can also be accessed from the Start menu group of Adlib PDF.
7. Once Adlib PDF has been licensed, the Process Manager Service must be started using Windows Services before the Transformation Engine will be operational. Also, if self-hosted web and Job Management Services have been installed, the Process Manager Service must be started before the Adlib Management Console can be accessed.

**Figure 1 - Start Process Manager Service**

![Start Process Manager Service](image)

**Launch Adlib**

Open Adlib PDF from the Start menu.

1. Select **Start > All Programs > Adlib > Adlib Management Console**.

**Login**

Adlib PDF is an account-based web application, requiring users to Log In using their assigned credentials.

1. Enter your **Username** and **Password** in the **Log In** window.
2. Click **Submit**.

**Figure 2 - Adlib Log In**

![Adlib Log In](image)

To exit Adlib PDF, click **Log Out** at the top of any page.
Management Console

The web-based administrative console provides centralized management of Adlib PDF for system configuration, health monitoring, and reporting.

The Home page of the Management Console provides Quick Access shortcuts to three functional areas:

- **System Settings** to configure Environments, Sources, Users, and Variables.
- **Job Settings** to configure Job Acceptance and Transformation Rules.
- **Monitoring** to monitor Component health, troubleshoot failure issues, and generate reports on job and system performance.

The System Status Overview visually identifies the health status of Adlib system Components and provides access to status logs to troubleshoot any issues.

*Figure 2 - Management Console Home Page*
Components
The Adlib system comprises several Components to interface with users, manage jobs, perform transformations, monitor services, and report system and job status. Adlib PDF includes the following Component types:

Connectors
A Connector Component monitors a Source for content, submits the content as a job to Adlib PDF, and receives completed job output.

Different types of Connectors integrate with various Source types:
- The Folder Connector integrates with Folder Sources.
- The Generic Connector integrates with the Web Service interface.
- The SharePoint Workflow Connector integrates with Microsoft SharePoint via workflows.
Job Management Services
These are services that interface within Adlib PDF used to submit and receive Jobs. They are called by Connectors and custom integrations.

Logger
These Components log data into the Adlib PDF database.

Process Manager
These Components control individual processes on a single machine within Adlib PDF. Its role is to start, stop, monitor, and restart the processes assigned to it.
There is one Process Manager Component installed on each machine on which Adlib Components, such as Folder Connector, are installed.

Services
This is a layer of communication services used primarily by the Management Console.

System Manager
These Components manage jobs and monitor all Adlib PDF Components. They prepare jobs for the Transformation Engine by executing the appropriate Transformation Rule Sets. They also monitor the health of Components and issue alerts to the System Administrator.

Transformation Engine
These Components perform the transformation of content.

Environments
An Environment is a group of registered Components that are assigned for use in Adlib PDF. Environments define the working system in which Components reside. Components must be assigned to an Environment to be activated. Each Component can only be assigned to a single Environment. Components may be installed in a single server deployment, or in a multiple-server Environment for scalability and high availability.

Sources
A Source is a repository or structured container of digital content where input documents and metadata are drawn from. These include file folders, content management systems (e.g. SharePoint), or custom Sources built through web services.

Rules
Rules are declarative statements that apply one or more Settings when its associated Rule Condition evaluates to true. They form the core functionality of Adlib PDF, allowing any calling application to make decisions based on metadata.

Rule Sets
Rule Sets are collections of related Rules. Rules within Rule Sets have a defined execution order and are forward-chaining. Three Rule Set types are used within Adlib PDF:
- **Component Initialization Rule Sets** define configuration Settings for initialization of Components within an Environment.

- **Job Acceptance Rule Sets** define criteria that constitutes acceptance or denial of a job based on metadata values.

- **Transformation Rule Sets** define conversion Settings for the job.

**Rule Set Editor**

Rule Sets are defined and configured on the *Rule Set Editor* page, accessed from either *Environments* or *Job Settings*.

- The *Active* tab displays published Rule Sets. Active Rule Sets may be viewed but not modified.

- The *Edit* tab is used to create or modify Rule Sets that are inactive.
Adlib PDF Defaults

Adlib PDF is installed with out-of-the-box (OOB) defaults including Environment, Source, Connectors, Variables, and Reports.

Default Environment
A Default Environment of registered Components is installed with Adlib PDF. The following Components are assigned to the Default Environment:

- Job Management Services
- System Manager
- Process Manager
- Transformation Engine
- Services

Refer to Components for detailed description of Component types.

Default Sources and Connectors
Sources serve as repositories of content and include file folders, content management systems (e.g. SharePoint) or custom Sources. Connectors provide the link between Sources and Adlib PDF. Default Sources and Connectors are provided with the installation of Adlib PDF. These include:

<table>
<thead>
<tr>
<th>Source</th>
<th>Connector</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder Source</td>
<td>Folder Connector</td>
<td>Integrates with file folders. A sample Folder Source and Folder Connector are configured by default with a complete installation of Adlib PDF.</td>
</tr>
<tr>
<td>Generic Source</td>
<td>Generic Connector</td>
<td>Interfaces with Web Service calls. Contact Adlib for more information.</td>
</tr>
<tr>
<td>Documentum Source</td>
<td>Documentum Connector</td>
<td>Interfaces with EMC Documentum. Refer to the Adlib PDF Documentum Connector Guide for more information. Contact Adlib for information on accessing this functionality.</td>
</tr>
<tr>
<td>SharePoint Workflow Source</td>
<td>SharePoint Workflow Connector</td>
<td>Interfaces with Microsoft SharePoint. Refer to the Adlib PDF SharePoint Workflow Connector Guide for more information. Contact Adlib for information on accessing this functionality.</td>
</tr>
</tbody>
</table>
Default Instruction Set

Instruction Sets are groups of Rule Sets that define Job Acceptance and Transformation Rules. Adlib PDF provides a sample Instruction Set associated with a Folder Source which is configured to perform a convert to PDF transformation by default.

Default Reports

The Reporting page, accessed from the Job Settings tab, provides four default reports:

- System Load Report reports on engine workload.
- Job Success Report reports the percentage of jobs that completely successfully.
- Job Time Report reports the processing times for all jobs within a time range.
- Job Volume Report reports how many jobs the system has processed.
Settings

System Settings
The System Settings tab of the Management Console provides functions for configuring Adlib PDF. Four tabs provide general system functions to:

- Configure installed Components within Environments.
- Define Sources of documents to be transformed.
- Manage Users and assign roles.
- Manage Global Variables.

Job Settings
The Job Settings tab of the Management Console provides configuration functions for defining job processing Instruction Sets. Instruction Sets are groups of job processing Rule Sets that are evaluated on a per job basis when documents arrive in an associated Source. Each Instruction Set is associated to one or more Sources and are configured with Job Acceptance and Transformation Rule Sets.

- Job Acceptance Rules define whether jobs are accepted or denied based on metadata values.
- Transformation Rules define how the Source document(s) will be transformed.

Use the out-of-the-box Default Environment, Default Source and Default Instruction Set to define Rule Sets to perform specific transformation tasks.
Monitoring

Adlib PDF provides a reporting mechanism for Component health monitoring, troubleshooting, system and job logging, and performance reporting. Job and system information is collected in a central database to capture vital system statistics and facilitate reporting. This information can be used to monitor system loads, verify that system performance meets Service Level Agreements (SLAs), and anticipate the need to expand capacity before users or business performance is affected.

Job Status

Job Status provides detailed information about each job submitted and uses this information to troubleshoot in the event that a document fails to be converted. Job Status uses search criteria to query the database for job information. Search results lists all jobs meeting the criteria selected.

The Job Status page, accessed from the Monitoring tab, provides a search criteria area where search details are defined and an execute search arrow to query the database for job information based on criteria specified. Search results are displayed in the grid portion of the page. To reset the filter criteria, click the Reset button to the left of the Execute Search arrow.

*Figure 4 - Job Status Page*
Job Status details identify the following:

- Date/Time job completed,
- Environment to which the Component is assigned,
- Unique Job Id assigned to each job which links to this Job Id on the System Log,
- Run priority assigned to the job,
- Date/Time job started,
- Job Status, and
- Date/Time of last heartbeat.

Sub-tabs offer additional job details including

- Component information,
- Job Processing details,
- Job Documents processed in the job, and
- Job Ticket used to process the job.

An Export option is available to export Job Status to Excel spreadsheet format.

A Problem Submission option collects information about selected jobs and packages it into a file that can be submitted to Adlib Support to expedite issue resolution.

The Job Id parameter provides a link to System Log entries related to that job. This is used to determine whether a system Component was the reason that a Job Id did not successfully complete.
System Status

*System Status* identifies the health status, or heartbeat, of all Components in Adlib PDF. Components can be running on various machines across the network.

The *System Status* page, accessed from the *Monitoring* tab, provides an **Alarm Acknowledged** indicator to acknowledge Component status alarms.

**Figure 5 - System Status Page**

(System Status page screenshot)

**System Status** details identify the following:

- Alarm Acknowledged indicator,
- Component Status,
- Component Type,
- Environment to which the Component is assigned,
- Install path of the Component,
- Type of log message by level of severity,
- Machine on which the Component is installed,
- Date/Time the component was started,
- Time Interval between heartbeats,
- Date/Time of last heartbeat, and
- Component initialization information.

An **Export** option is available to export *System Status* to Excel spreadsheet format.
System Status Overview

The System Status Overview, displayed on the Home page, visually identifies the health status of Adlib PDF Components. Each box in the Overview represents a Component category.

Figure 6 - System Status Overview

Connectors
Connector Components monitor Sources for content. They submit the content as jobs to Adlib PDF and receive completed job output. When these Components are inoperative, new jobs will not be initiated from Sources.

Services
This is a layer of WCF-based (Windows Communication Foundation) services used primarily by the Management Console. Job Management Service is a set of web service calls that permit external integration with Adlib PDF.

System Managers
System Manager Components manage jobs received via web services and are responsible for monitoring the health of all Components and issuing alerts.

Engines
Engine Components perform the transformation of files. When these Components are inoperative, jobs may still be received and queued by the system, but will not be completed until one or more Engines become available.
Process Managers

Process Manager Components control individual processes on a single machine within Adlib PDF. There is one Process Manager Component on each machine on which any Adlib Components are installed. Process Managers start, stop, monitor and restart the processes assigned to it.

System Status

The System Status box identifies the overall status of Adlib PDF. When alarms are issued, this box will be flagged with a warning.

Clicking on a Component box in the System Status Overview opens the System Status page, filtered to display status information for the selected Component category.

Alarms

When an Adlib PDF Component is in an alarm state (e.g. faulted, stalled), it is flagged on the System Status Overview with a flashing warning indicator.

- Clicking on a Component box in the Overview opens the System Status page, filtered to display information about the selected Component.
- When alarms are acknowledged on the System Status page, the warning indicator state changes from flashing to solid.
- Once the issue that caused the alarm is resolved, the warning indicator is no longer displayed in the Overview.

To Acknowledge Alarms

1. On the System Status Overview, click on a Component box that displays a flashing warning indicator.
2. Adlib PDF opens the System Status filtered for the Component selected.
3. Check the Alarm Acknowledged parameter to acknowledge the Component alarm. The state of the warning indicator on the System Status Overview changes from flashing to solid.
System Log

System Log provides event logs from Components within Adlib PDF. System Log uses search criteria to query the database for system information. Search results lists all event details meeting the criteria selected.

The System Log page, accessed from the Monitoring tab, provides a search criteria area where search details are defined and an Execute Search arrow to query the database for system information based on criteria specified. Search results are displayed in the grid portion of the page.

Click the Filter Reset button to clear the filter fields. The Filter Applied message indicates that the search results are currently filtered.

Figure 7 - System Log Page

System Log details identify the following:

- Document being processed when the event occurred
- Job Id
- Type of log message by level of severity,
- Name assigned to the Logger module,
- Machine on which the event occurred,
- Log entry message,
- Date/Time when event occurred.

Sub-tabs offer additional log details:

- Full Message tab displays the entire log entry.
- Exception tab displays detailed exception data (if any). Typically for errors only.
- Stack Trace tab displays the call stack to help technical support identify where in the code the log entry was generated.

An Export option is available to export System Log to Excel spreadsheet format.

A Problem Submission option collects information about selected System Log entries and packages it into a file that can be submitted to Adlib Support to expedite issue resolution.
Reporting
Adlib collects job and system information in a central database to facilitate performance reporting, providing statistics on job and system health. Report pages provide a Report Parameters drop down to query the database for job and system data for a specified period and time interval.

An Export option is available to export a report to Excel spreadsheet format.

A Search box enables searching of report results. Page numbers and page selection is available at the bottom of the report page.

Filters are available to filter report results by specified report values.

Four default reports are available:

- **System Load** reports on engine workload
- **Job Success** reports the percentage of jobs that completely successfully
- **Job Time** reports the processing times for all jobs within a time range
- **Job Volume** reports how many jobs the system has processed
Basic Steps

For users who have implemented a complete install, the following steps illustrate basic use of Adlib PDF:

1. Start Process Manager
   - Open the Services list (Select Start > Run and type Services.msc in the Run dialog box).
   - Select Adlib Process Manager from the Services list.
   - Click Start the service (or Restart the service).

2. Verify System Readiness
   To verify system health, confirm that no Components are in a faulted or stalled state.
   - Status indicators on the System Status Overview on the Home page provide warnings when Components are in an alarm state.
   - The System Status under Monitoring identifies the state of Components under the Component Status column.

3. Submit Job
   - Ensure all the previous steps are complete and the Adlib PDF is up and running error free.
   - Submit a document to be converted:
     - Copy input documents to the Default Source input location (this location is identified on the Sources tab, under System Settings).
     - When the Folder Connector that is monitoring the Source detects the arrival of any documents, it submits jobs for processing.

4. Monitor Job Progress
   - Navigate to Job Status under Monitoring to view job information.
   - Enter search criteria to query the database for the job that you submitted.
   - Successfully completed jobs will display CompletedSuccessful in the Status column.

5. Check Output
   - Open the output location defined for the Source to view results (this location is identified on the Sources tab, under System Settings).

For detailed information on using the Adlib PDF, refer to the Adlib PDF User Guide. The Job Settings Samples section of the User Guide illustrates the steps required for common configurations and transformations.
Appendix A: Contact Adlib

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<td><a href="http://www.adlibsoftware.com/">www.adlibsoftware.com/</a></td>
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<tr>
<td>Sales</td>
<td><a href="mailto:sales@adlibsoftware.com">sales@adlibsoftware.com</a></td>
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<tr>
<td>Support</td>
<td><a href="mailto:support@adlibsoftware.com">support@adlibsoftware.com</a></td>
</tr>
<tr>
<td>Phone</td>
<td>1-905-631-2875 or 1-866-991-1704 (North America)</td>
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<tr>
<td>Fax</td>
<td>1-905-639-3540</td>
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<tr>
<td>Mail</td>
<td>Adlib</td>
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<tr>
<td></td>
<td>215-3228 South Service Road</td>
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<td></td>
<td>Burlington, Ontario</td>
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<td>Canada L7N 3H8</td>
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