

FileConvert

User Guide

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Introduction to FileConvert

FileConvert is an easy-to-use, bulk-conversion utility for converting image files – like scans and faxes – into searchable PDF files. It can also convert to TXT or TIFF formats. FileConvert will watch specific folders for new files to convert, including subfolders. Its flexible jobs, scheduling, document separation, routing, and OCR options make FileConvert one of the most useful PDF converters available. At the same time, its clean, easy interface and helpful wizards make it user-friendly, even for non-technical users.

Here are some steps to help you get started with FileConvert:

Back Up Your Files!

While FileConvert does its best to take care of your files, some things are out of its control: Windows crashes, power outages, hardware failures, insufficient memory, network glitches, and incompatible file formats, just to name a few. FileConvert will try to back up every file it converts, but you should still have backups of your own.

Familiarize Yourself with FileConvert's Features

Read through FileConvert's [Feature Overview](#) to learn what FileConvert has to offer and how you can put it to use.

Set Up a Job

Look at [Conversion Job Basics](#) to learn how to get your first job set up.

Having Trouble?

If you're having trouble with FileConvert, look over the [Troubleshooting](#) section for solutions to common problems.

Feature Overview

To help you get started using FileConvert, here is a list of key features:

Convert Image Files to Searchable PDF

FileConvert will convert image files (usually scanned documents or faxes) to searchable PDF format. This means that the new file will have a true image of the original, but it will also have embedded text that you can copy or use for keyword searches. Besides PDF, FileConvert will also convert files to TXT (plain text) or TIFF image format. You'll get to choose the output format when you set up your job.

Convert Existing Files

Maybe you have a hard drive full of old scans or faxes that need to be updated to searchable PDF. FileConvert will look through whole trees of folders for these old images and either convert them in-place, leaving a new searchable PDF where the old image file was, or put the converted file in a parallel folder tree, maintaining the folder layout of the source tree. [Learn more »](#)

Convert the Output of a Network Scanner or Fax

If your network scanner or fax server saves to file, as most do, FileConvert will watch for these new files and convert them to searchable PDF format. [Learn more »](#)

Integrated OCR

The key to making PDF files searchable is extracting actual text from the images. This is known as OCR, or *Optical Character Recognition*. FileConvert can silently run OCR as part of the conversion process.

Unfortunately, OCR is also the slowest part of a conversion. To give you better computer performance during working hours, FileConvert has flexible scheduling so you can run jobs only during off-hours or over the weekend. You still get the benefits of searchable PDF files without putting up with the slow-downs. [Learn more »](#)

Automatic Separation

FileConvert can automatically break up a single scan into individual files. This lets you scan a whole stack of documents in a single job, knowing that FileConvert will take care of splitting them up into separate files for you. [Learn more »](#)

Intelligent Naming & Routing

When you scan documents, you can include routing information that will tell FileConvert exactly where to save the files, what file format to use, and what filename to use. Clever use of FileConvert's intelligent routing can help you reduce the whole the scanning, conversion, and saving process down to a single button-press. [Learn more »](#)

Flexible Scheduling

FileConvert provides flexible scheduling options. Run a conversion job on demand, at a specific time each day, or even every minute. Different kinds of conversion jobs have different time requirements. FileConvert is designed to accommodate them all. You'll specify your scheduling preference when you create a job.

Job Priority

Need to slip a high priority job in at the top of the queue? FileConvert jobs have a priority setting so that the most crucial jobs get done first.

Detailed Status Reports

FileConvert will let you know exactly how your conversion jobs have gone. Detailed logs give you job overviews, including any errors or warnings, and tell you exactly which files were converted, right down to how files were separated and routed. You can see the logs anytime from the *Log* tab at the bottom of the FileConvert interface.

Conversion Jobs

FileConvert uses *conversion jobs*. A job tells FileConvert what to do: where to look for files to convert, what format to convert the files to, where to place the converted files, etc. A job may be a one-time operation, but more likely a job will be a routine that you run over and over, like regularly checking the network scanner for new scans. You will set up each of your conversion jobs and tell FileConvert how often to run them – every few minutes, hourly, daily, or maybe only when you tell it to. All of these options will be explained in the upcoming help topics.

Creating and Editing Jobs

You'll set up your jobs at the *Jobs* tab in FileConvert. Just click the *New* button, then follow the instructions in [Conversion Job Options](#).

Running Jobs

You can set up jobs to run automatically, or you can run them manually.

To run jobs automatically, you'll specify a schedule with the other job options when you create or edit the job. See [Job Schedule](#).

To run a job manually, see [How to Run a Job](#).

The Conversion Queue

When you run a job, FileConvert finds files to convert then adds them to a queue. This is simply a list of files waiting to be converted. You can see the queue under the *Queue* tab. Here you can watch FileConvert's progress, temporarily suspend all conversions, and remove files from the list.

Logs

Once a file has been converted, an entry will show up in the *Log* tab to give you statistics and status information about the file. It will show where the file was saved, what the new filename is, if any [separators](#) were used and what files resulted from them, and if there were any errors in the conversion.

Conversion Job Options

This topic will help you set up a conversion job. You'll add and edit your conversion jobs from the *Jobs* tab > *New* or *Edit*.

Job Name

First, give your conversion job a unique name.

Manual Job or Scheduled?

A manual job will run whenever you fire it manually. A scheduled job, like the name implies, runs on a schedule (specify under the *Schedule* tab).

Use Batch Files

With this option, you will feed FileConvert a list of files you want converted. The list must meet these criteria:

- Plain text file with a ".txt" extension
- One filename per line
- Give the complete path for each file
- The files can reside anywhere

To feed the text files to FileConvert, designate a *Batch File Folder* and save the files there.

Every time the job runs, FileConvert will look in the *Batch File Folder* for a new text file, read the list from it, and add every file in it to the queue. This is a good option if your files are managed by a database or another system. It's also a good option if you have thousands and thousands of files to convert – instead of having FileConvert recurse through your folders looking for files, which is slow and resource-intensive, you simply tell FileConvert what files you want converted.

Location of Input Files

FileConvert will search through this folder for files to convert. It will look for the file types you specify, and can optionally look in subfolders too.

Input File Types

Select the kinds of files you want to convert.

NOTE: Some of these file types can't be converted when you're running FileConvert as a service. See [Run as a Service](#) for more information.

Other Options

The following job options are available:

Also Include Subfolders

Also look in subfolders when searching the *Location of Input Files* for files to convert.

Delete Input Files after Conversion

If you're putting your converted files in a new location, you can delete the original from the input folder after conversion.

Redo PDFs That Are Already Searchable

Normally FileConvert will skip PDFs that are already searchable. This option will redo OCR on PDFs that are already searchable.

Use Same Subfolder Structure for Output Files

If you're putting your converted files in a new location, this will replicate the original folder structure of the input folder. Only relevant if *Also Include Subfolders* is selected.

Keep Converted Files in Their Original Folders

Convert files in-place instead of putting the converted files in a separate folder.

WARNING: This will overwrite the originals!

Output Locations

If you want to save your converted files to a new location, enter the location here. Note that you can save to more than one location.

How to Run a Job

If you've set up a schedule for your job, FileConvert will run the job automatically according to the schedule, scanning for new files and converting them without any action on your part. FileConvert doesn't have to be open for this to work.

You can also run a job manually anytime you want. Here's how that works:

1. Select the *Jobs* tab
2. Select the job
3. Click *Scan for Files*
4. Click *Convert* to begin conversion, or *View Files* if you want to make changes to the list

If you clicked *View Files*, FileConvert will display a list of files that are ready to be converted. If you want to remove a file from the list, select it and click *Remove*. The file will be skipped until the next time the job runs.

When you're ready to begin converting the files, click *Convert*.

It's safe to close the FileConvert interface while files are converting. FileConvert will continue converting the files in the background.

Redo Files

You can redo specific files or an entire job, but the way you'll do it depends on the job type.

If your job doesn't delete or replace the source files, see *Source Files are Intact* below. Otherwise, see *Restore from Backup* below.

Source Files are Intact

If your job keeps the source files untouched, it's easy to redo specific files or even redo the entire job.

Redo Specific Files

To redo a few specific files:

1. Go to the *Jobs* tab
2. Select the job
3. Click the *Files to Convert* and *Folders* buttons
4. You should now see the files in the Input Folder on top
5. Select the file(s) in the list
6. Click *Add* to add the file(s) to the *Files to Convert* list
7. Click *Convert* to begin conversion

Redo the Whole Job

If your job doesn't delete the source files, FileConvert will keep track of files it has already converted in the *Job History*. This is different than the logs. It's a list of files that have already been converted so FileConvert won't keep converting the same files over and over.

To redo a job, simply clear the history:

1. Select *Jobs* tab
2. Select the job
3. Click the *Job History* button
4. You'll see a list of files that have already been done, with their status
5. Click *Clear* to clear the history

If this is a scheduled job, files will begin converting the next time the job runs. If it's a manual job see [How to Run a Job](#).

Restore from Backup

If your job deletes or replaces the source files, you'll have to restore the originals from backup.

1. Go to the *Jobs* tab
2. Select the job

3. Note what the job's *Backup Folder* is
4. Browse to the backup folder in Windows
5. Copy the files or folders you want to redo, then paste them back in their original location

If this is a scheduled job, files will begin converting the next time the job runs. If it's a manual job see [How to Run a Job](#).

Optical Character Recognition

When you scan a document, you create an *image* file. Even though the image seems to have text, to the computer it is just a picture.

Optical character recognition (OCR) is a process which extracts text from a scanned image. It does this by looking for recognizable letters and words. A good OCR engine can pull the text out of a scanned image with excellent [accuracy](#).

Why Bother with OCR?

If your only concern is archiving paper documents as electronic files, OCR may not matter to you. But if you want to copy and paste text from a scan, or do a text search of the scan's contents, you will need OCR.

Where Does the OCR Text End Up?

If you convert your files to *PDF* format, FileConvert embeds the OCR text in the PDF file:

- The original scanned image of the document is on top
- The OCR text of the document is embedded invisibly behind
- Each word of OCR text is aligned behind the image of the word

FileConvert can also create a plain text file, which is *just* the unformatted OCR text without the original document image.

How Do I Turn On OCR?

When you set up your job, you'll be asked whether you want to include OCR as part of the process.

Can I Re-Run OCR?

You can redo OCR by re-converting the file. You'll need to set up a [conversion job](#). Under the *Source* option, set the input file type to *PDF* and select the *Redo PDFs That Are Already Searchable* option. PDF files which have OCR text will be re-converted. FileConvert will discard the old OCR text, re-run OCR, and embed the new text in the file.

What OCR engine is FileConvert using?

When you set up a [conversion job](#), you can choose among several OCR engines. See [Job Advanced Options](#) for more information.

OCR Accuracy

OCR accuracy can be very good. Follow these guidelines to keep accuracy as high as possible.

Handwriting

OCR can only recognize typewritten text, not handwriting.

Page Orientation

OCR requires that the page be upright. If your scanner always produces rotated pages, you can [set your conversion job](#) to turn them upright.

NOTE: Some OCR engines can handle rotated pages, but it degrades OCR speed.

Document Quality

One of the most important factors in OCR accuracy is the quality of the original document. Small fonts and rough, blurred characters will degrade OCR accuracy, as will stray marks and excessive "noise" or background patterns. The best accuracy will come from a clean document which uses a 10-14 point font size. The common font faces – Times, Arial, and Courier – will have the highest recognition rates.

Image Resolution

For best accuracy, we recommend that you scan in *black and white* at *300 dpi*. Higher resolution will not greatly improve accuracy but it will increase the file size dramatically. It is not necessary to scan in color or gray scale, which both produce very large file sizes.

Black/White Threshold; Darkness

A very common cause of bad OCR accuracy is an image that is too light. When an image is too light, there can be gaps and holes in the characters. These gaps and holes make it very difficult for the OCR engine to figure out what the characters are. Increase the *black/white threshold* or *darkness* setting of your scanner until it produces an image with solid characters.

Conversely, an image that is too dark has very thick characters which bleed together, making it hard for the OCR engine to distinguish one character from the next. Decrease the *black/white threshold* or *darkness* setting of your scanner until it produces an image with solid but distinct characters.

OCR Engine

Your choice of OCR engine can make a difference both in OCR accuracy and speed. See [Job Advanced Options](#) for more information.

Separator Basics

The most efficient way to scan is to run whole stacks of documents through the scanner. But this puts all of the documents into one file, leaving the problem of how to separate the documents afterwards.

FileConvert solves this problem with *Separators*. Separators are special pages that go between your documents when you scan. A separator shows FileConvert where a new document begins so that FileConvert can put the document in its own file.

Document separation is just the beginning. The real power of FileConvert's separators is in *autosaving* or *routing* files. Each separator can specify routing and filename information. Not only will FileConvert split the document into its own file, it will save the file wherever you want it to go. Using separators, it is possible to convert a large batch of files from the scanner and automatically save every file to a different location.

Office Mail Example

For example, an office has created a unique separator for each employee. They use these separators to automatically route the daily mail. This works well since they already had the goal of digitizing all inbound mail. When the daily mail comes in, the secretary sorts it with employee separators and then scans the entire stack in one batch.

FileConvert is watching the output of the network scanner. When the new scan appears, FileConvert pulls out each piece of mail into a separate file and forwards it to the network folder for the right employee. Once the secretary presses the *start* button on the scanner, the whole process plays out automatically.

How Do I Create Separators?

Separators are easy to create and print right inside of FileConvert. [Learn how »](#)

Are There Separators That *Only* Separate?

There are three kinds of separators:

Generic Separators

Generic separators only have one purpose: separating documents. They do not have any auto-saving or routing rules. [Learn more »](#)

Standard Separators

Standard separators have a number of features and options, like fixed-length page separation, filename rules, selectable conversion formats, etc. [Learn more »](#)

Bookmark Separators

Bookmark separators work a little bit differently. Instead of splitting the document, they place a bookmark in the PDF. This is actually a variation on *Standard Separators*. [Learn more »](#)

When Does Separation Happen?

Separation happens with OCR. One of the OCR options is to *Process Separators*. If this option is selected, FileConvert will look for separators in the document. It identifies them by the special codes at the top of the separator page.

How Do I Share Separators with Other Users?

You can share your database of separators on the network so everyone can use the same separators. See [Separator Settings](#).

Generic Separators

Generic separators only have one purpose: to separate documents. They don't have any options like [Standard Separators](#).

There is a system-defined generic separator that always appears at the top of the list of separators. It cannot be deleted or modified. To print a copy of the generic separator, select it from the list and click *Print*.

In addition, any separator that isn't recognized will be treated like a generic separator. For example, if you delete a separator from the list but continue scanning with the printed copy, it will be treated like a generic separator.

Where Will the Separated Documents Go?

Every [conversion job](#) has an output location. That's where documents with generic separators will be saved. The filename preferences for the job will be used to name the file. This may be the *original filename*, in which case the separated document will keep the same name as the original file, or you may have specified a default filename to use with that job.

What about Naming Conflicts?

FileConvert will never overwrite an existing file, even if there is a name conflict. When a name conflict happens, FileConvert will give the new file an increment. For example, suppose that the file "scan.pdf" already exists. FileConvert needs to place a new file, also called "scan.pdf", in the same folder. FileConvert will save the new file as "scan 01.pdf" to prevent a conflict. If another "scan.pdf" comes along later, FileConvert will save it as "scan 02.pdf", and so on.

Standard Separators

Standard separators have two functions: 1) separate documents, and 2) automatically save the documents based on options that you define. You will create, print and manage your separators from the *Tools* button > *Separators*. The options below are available when you create or edit a separator.

Separator Name

Each separator must have a unique name. Try to use a name that is as descriptive as possible. This will help you recognize the separator after it's printed.

Use as Bookmark Separator

If you select this option, the separator will insert a bookmark in the PDF instead of splitting it. The bookmark will use the name of the separator. No other options are available for bookmark separators.

Separator Destinations

Separators must have at least one *destination*. A destination is a set of options for auto-saving a document, like file name, path, file format, etc. To add a destination, click the *Add* button under the list of destinations in the *Add Separator* dialog. Then follow the instructions in [Add a Destination](#).

Tip: A separator can have more than one destination. When the separator is processed, the document will be saved to every destination on the separator.

Begin a New Document Every ___ Pages

A single separator can optionally split a document at fixed page intervals. For example, suppose that you scan a whole stack of documents at once. Every document in the stack is exactly 3 pages long. A single separator at the beginning of the stack can split the document into individual files every three pages.

To enable this functionality, select the option *Automatically Begin New Document Every ___ Pages* and enter the number of pages you want in each document.

To use this separator:

- Put it at the *beginning* of the stack
- Only insert it *once*
- It will affect every document following it
- It will remain in effect until the end of the file, or until FileCenter runs into another separator

Choose among Destinations ...

If a separator has more than one destination, FileCenter can print the separator as a check-list of

destinations. Each destination is an *option* you can select by marking it. After you scan with this kind of separator, FileCenter will only save to the destination(s) that you've marked.

To enable this functionality, select the option *Choose among Destinations by marking on printed Separator*.

To use this separator:

- Set up each choice as a destination in the separator
- Print the separator
- Note that each destination begins with: (-)
- On the printed separator, mark the destination(s) you want to use by putting a short vertical line through the hyphen
- Scan

IMPORTANT: To mark a destination, your goal is just to destroy the hyphen ("-"). A short vertical line through the hyphen is all it takes. A small "x" through the hyphen will also work. But it's critical that your mark **not touch the parentheses** and **not extend above or below the parentheses**.

Manage Separators

Create, print, and manage your separators from the *Tools* button > *Separators*. This dialog shows all of your active separators.

Add a Separator

To create a new separator, click the *Add* button. All of the separator options are explained in [Standard Separators](#).

Edit a Separator

To change the settings of an existing separator, select it and click the *Edit* button. Note that you do NOT have to reprint the separator, even if you change its settings (unless you change its name).

Print a Separator

Print any separator on the list by selecting it and clicking the *Print* button.

Delete a Separator

To delete a separator, select it on the list and click the *Delete* button. This will permanently delete the separator definition and rules. You should also destroy the printed separator so that you won't use it accidentally.

NOTE: If you try to use a separator that's been deleted, it will be treated like a [Generic Separator](#).

Naming Options

You can add intelligence to the way FileConvert names files by using *naming options*. Think of naming options as filename templates. They can have regular, static text (e.g. *Scanned Document.pdf*) or they can use dynamic fields, like client names and dates (e.g. *Smith, Bob - Consulting Agreement - 2012-03-31.pdf*).

Naming options are available everywhere that you can specify a filename in FileConvert, like job destinations and separators.

For example, when you create a separator, you'll notice that the filename option is actually a drop-list. This drop-list will show your naming options. Just pick one from the list.

Creating and Managing Naming Options

To learn how to create and manage naming options, see [Manage Naming Options](#).

Dynamic Fields

To learn what dynamic fields are available in naming options, see [Naming Option Fields](#).

Add a Naming Option

Add naming options from the [Naming Options Dialog](#), or on-the-fly using the naming option wizard button. This topic describes the available options.

The Filename Expression

The heart of a naming option is the *Expression* field. This is where you format the filename with text and fields. Creating a filename expression can be as simple as typing in some text:

```
Engagement Letter  
IRS Form SS-4  
Monthly Newsletter
```

But the real power of naming options is in the dynamic fields. Whenever FileConvert saves a file using a naming option, the fields will be resolved to text, like a date stamp, a FileCenter drawer name, or an incrementer to avoid filename conflicts. For example, notice how these naming options might look when turned into filenames:

```
«FOLDER Drawer Name» Engagement Letter  
Robert Johnson Engagement Letter
```

```
«DATE mmmm» Monthly Newsletter  
August Monthly Newsletter
```

Inserting Fields

FileConvert makes it as painless as possible to insert fields. Just follow these steps:

1. Position the cursor where the field belongs in the *Expression*.
2. Select the field you want in the *Field Type* list
3. Select any options you want in the *Field Option* list (there might not be any)
4. Click the *Insert Field into Expression* button.

This will insert your properly-formatted field into the expression. Feel free to add text before or after the field, cut and paste the field into a different part of the expression, and insert more fields. With dates, you can even modify the date format right inside of the field, if you know what you are doing.

To remove a field from the expression, just delete it using your keyboard. You can also clear the entire expression using the *Clear Entire Expression* link or just the increment portion of the expression using the *Clear Increment* link.

Available Fields

For more information on the fields and their options, see [Naming Expression Fields](#).

Example

As you build your filename, the *Example* area shows you how the filename might look after the fields have been populated. It populates the fields with sample data to give you a very user-friendly way of seeing the filename expression. Use the example to check the spacing between the elements of your filename.

Save as a Naming Option for Future Use

If you are creating this naming option on-the-fly, you can choose to save the naming option for future use. This will let you come back later and modify the naming option, or re-use it in other places.

Manage Naming Options

You'll add and edit your naming options from the *Tools* button > *Naming Options*.

Naming Option List

The *Naming Options* dialog shows your naming options, along with some basic information about each one:

Name/Expression

The first column shows the filename with its fields.

Increment

If the filename includes an auto-incrementer, it will show in the *Increment* column.

Example

The *Example* column shows how the filename might look after the fields have been populated. This is a "friendly view" of the naming option. Note that this is just an example. It is *not necessarily* what the filename will end up being.

Shared

Indicates whether this naming option is being shared on the network (when also using FileCenter. Note that you can't edit shared naming options.

Sort Order

There are two ways to sort your naming options – alphabetically or manually. To do manual sorting, deselect the *Sort Alphabetically* option, then use the *Up* and *Down* buttons to move your naming options around.

Note that this sort order will be used *everywhere* that you use naming options.

Add, Edit and Delete

Edit and delete your naming options right from this list. To create a new naming option, just click the *Add* button. Then [follow these instructions](#).

Naming Options & FileCenter

FileCenter also features naming options. To help you be consistent in your file naming, FileCenter and FileConvert both share the same naming options. The only difference is that some of FileCenter's fields are not valid in FileConvert. These fields won't be available in FileConvert, and any naming option that uses these fields will be hidden in FileConvert.

Naming Option Fields

This topic describes the fields that are available when you create a [naming option](#).

Original Filename

When you are converting a file, you may want to keep the file's original name or use the original name as part of a new filename. The *Original Filename* field will let you use the original filename in your naming option.

Note that the original filename does *not* include the path or the file extension. For example, if a file is named `c:\files\letter.doc`, the original file name will be *letter*.

Folder Name

You can use a file's *Parent Folder* as part of the filename. This is the *destination* folder, or in other words, the output folder where the converted file is going to be saved. Sometimes this folder name has useful name information in it. For example, suppose that you name your folders after clients:

```
c:\clients\Johnson  
c:\clients\Mitchell  
c:\clients\Santos
```

You can get the client name from the parent folder name. In the examples above, the parent folders would be "Johnson", "Mitchell", and "Santos".

You can reference parent folders up to three levels deep:

```
c:\...\Parent_3\Parent_2\Parent_1\File.doc
```

FileCenter Folder Names

If FileCenter is installed on the same computer as FileConvert, you can also use FileCenter drawer and folder names as naming option fields. For example:

```
c:\cabinet\Johnson\Trusts
```

This path has a drawer name (*Johnson*) and a folder name (*Trusts*).

If the converted file will be saved into a FileCenter cabinet, you can use the target drawer name and the names of its subfolders as fields. This is a useful way to obtain a client or matter name/number. For example, if you use one drawer for each client, the drawer name will contain the client name. If, on the other hand, the first folder in a drawer contains the client name, you may be more interested in using that folder as a field.

The *Drawer Name* field option will give you the target drawer name. Folder names are supported up to three levels deep, and can be referenced either from the point of view of a drawer or from the point of view of a file:

```
Drawer\Level 1\Level 2\Level 3\File.doc
```

If a referenced drawer or folder does not exist or if FileConvert can't resolve the name (for example, there is no *Level 3* folder), the field will be ignored.

Date

A *Date* field will insert the current date, with flexible formatting options. A list of common formats is provided. If you don't see the format you want, insert any date format and customize it manually using any of these formatting codes.

Characters	Meaning
d	Day of month without a leading 0
dd	Day of month with a leading 0
m	Month as a number without a leading 0
mm	Month as a number with a leading 0
mmm	Abbreviated month name
mmmm	Full month name
yy	Two-digit year
yyyy	Four-digit year

You can use spaces, commas, and dashes between the date elements and arrange the date elements in any order you want. Feel free to omit any date element. For example, you may only want the current month or the current year.

NOTE: You cannot use a forward slash "/" in your date formats. This is an illegal character in file and folder names.

Auto Increment

Use an *Increment* to avoid filename conflicts when multiple files with the same name will end up in the same folder. An auto increment will automatically add a counter to the end of the filename. For example, if a folder will contain many files called *Report.doc*, using an increment will save them as *Report 01.doc*, *Report 02.doc*, *Report 03.doc*, etc.

There are a few different increment formats available. When you insert an increment, it shows up after the expression. An increment cannot be customized or edited. To clear it from the expression, click the *Clear Increment* link.

What If a Field Can't Be Resolved?

Sometimes a field can't be resolved to a value, either because of a syntax error in the field or because there is no value (such as "Level 3 Folder Name" when there isn't a level 3 folder). When a field can't be resolved, it will be ignored.

General Settings

The *General* settings control various aspects of the user interface as described below. Access these settings from the *Settings* button > *General* option.

Default Backup Directory

FileConvert will try to back up every original file before conversion. You can assign a different backup folder to each job when you set up the job, or you can let FileConvert back up the files to its default folder. This folder is defined by the *Default Backup Directory* option.

Queue Limit for Scheduled Jobs.

If your source folder has many thousands of files in it, FileConvert can bog down looking for files. The *Queue Limit for Scheduled Jobs* option solves this by only allowing a certain number of files in the queue at a time. Once the limit is reached, FileConvert stops looking for files.

For example, if you set the queue limit at 100 files, the first time the job runs, it will find the first 100 files. After that, each time it runs it will find enough files to top off the queue, then stop.

Your goal is to strike a balance between how often your job runs and how many files you can reasonably convert in that time period. For example, suppose you determine that you can convert about five files a minute. You're better off setting the queue limit at 300 and having the scheduler run hourly than setting the queue limit at 5 and having the scheduler run every minute. For jobs that will take weeks, you will want to only scan a couple of times a day to top off the queue.

Number of Concurrent Threads (FileConvert Pro PLUS)

FileConvert can run conversions in multiple threads. When it's running multi-threaded, it will concurrently convert one document per thread. You can specify the number of threads you want FileConvert to use (up to four). For optimum performance, this number should not exceed the number of processors on your machine. For example, with a dual-core machine, you could run up to two threads, meaning that FileConvert will simultaneously convert two documents at a time.

NOTE: Multithreaded conversions are only compatible with the *Advanced* OCR engine.

Remove Old Logs

FileConvert keeps very detailed logs which record file-by-file information about conversion jobs. These logs can get large over time. We recommend that you have FileConvert clean up old logs periodically. The default is to delete old log information after 30 days. Adjust this interval to fit your conversion load and log needs.

Run As a Service

Select the *Run As a Service* option to run the FileConvert engine as a Windows service. For more information, see [Run as a Service](#).

Remove Log Items Older than _____

This option will purge old log entries after the specified number of days. If your logs tend to bloat quickly, shorten the interval.

Separator Settings

Separator preferences are available from *Settings > Separators*.

Use Custom Location for Separator Database

Normally, separators will only be recognized on the machine where they were created because the separator database is kept with the rest of FileConvert's local settings. However, in an office environment you may want to be able to share separators between users. For this to work, the users need to share a common separator data file so that separators created by one user are available to the other users.

To share separators, select the *Use Custom Location for Separator Database* option and select a folder on the network where the shared separator database should be stored. This location must be visible to every user that will share separators.

NOTE: You'll need to set this option for every user that will share separators.

Keep Separators in Destination Documents

Normally, FileConvert will strip separators from documents when it performs separation. However, you may want to leave the separator sheets in the files for auditing purposes or otherwise. Selecting *Keep Separations in Destination Documents* will keep FileConvert from removing the separator sheets.

Run as a Service

FileConvert continues working behind the scenes, even when the main interface isn't open. Normally this requires that you stay logged onto the machine so that the conversion engine can keep running. When you log off, all of your programs, including the FileConvert engine, get shut down.

The *Run as a Service* option runs the FileConvert engine as a Windows service. This means that it will keep running, even if no one is logged onto the machine. To run FileConvert as a service, go to *Settings > General* and select *Run as a Service*. You may need to restart your machine.

There are some limitations to running FileConvert as a service.

Office Files

You can't convert Office files, like Word documents and Excel spreadsheets, when running FileConvert as a service. Documents may still get added to the queue, but they will fail to convert.

Mapped Drives

Mapped drives aren't available to a service. So if your job source, destination, or backup directories, separator destinations, or separator database directories are on mapped drives, you must change the mapped drive letters to UNC paths.

For example, suppose that your conversion job's source directory is on the network server. The server is named *our_server*, and the share is called *shared_files*. You normally access this share through a mapped network drive, called *S:*. In other words, *S:* points to `\\our_server\shared_files\`. Your new scans folder is at *S:\new_scans*. This is the UNC path you should use instead: `\\our_server\shared_files\new_scans`

You can browse to UNC paths through *My Network Places*.

Note that this only applies to *mapped* drives. You can still refer to local physical drives by drive letter (like the *C:* drive).

User Permissions

A service has no credentials or permissions on your network. In other words, if you have security settings that only allow certain users to access the drive or folder, FileConvert's service will not have access.

In this case, you'll need to run your service under the credentials of a specific user who has access:

1. Go to the Windows *Control Panel > Administrative Tools > Services*
2. Right-click on the *FileConvert Monitor* list item and select *Properties*
3. Go to the *Log On* tab
4. Select *This Account* for the *Log On As* option
5. Enter the username and password
6. Click *Apply* and *OK*

You may need to stop and restart the service for the change to take effect.

Troubleshooting

This topic describes some of the errors you might encounter.

Skipped Files

If FileConvert encounters a file that it can't convert, it will note an error in the logs and give the file a *Skipped* status. FileConvert may skip a file for any of these reasons:

- The file is corrupt
- The file has incompatible PDF features
- The file format isn't supported
- The file is encrypted or secured by a password
- The file is in use by another program
- The PDF file already has OCR text
- The PDF file is text-based or has text elements
- The file is a Word document and you're running FileConvert as a service (see below)

When FileConvert skips a file, it won't try to convert the file again. But you can force FileConvert to try again. See [Redo Files](#) for instructions.

Network Drives

If you're running FileConvert as a service, you should use UNC paths instead of mapped drive letters for all network drives. See [Run as a Service](#) for more information.

Permission Issues

FileConvert must have network and share *read*, *write*, *modify*, *create*, and *delete* rights for the:

- source drive
- source folder(s)
- source file(s)
- backup drive
- backup folder(s)
- target drive
- target folder(s)
- separators database folder

If FileConvert lacks the proper rights, any of the following could happen:

- No files get converted (source *read* rights)
- The source files never get deleted (source *delete* rights)
- The same files get converted over and over (source *create* and *delete* rights)
- The source files disappear but the converted files never show up (target *create* and *write* rights)
- No backups are made (backup *create* and *write* rights)

NOTE: If you're running FileConvert as a service, you may need to run the service under a specific user's credentials in order to have the network permissions you need. See [Run as a Service](#) for more information.

Office Files

In order for Microsoft Word documents to convert, Word must be installed and running on the same machine where FileConvert is installed.

IMPORTANT: Office file conversion is not available if you're running FileConvert as a service. Your Word documents will fail to convert.

Duplex Documents Don't Separate Properly

If you scan with a duplex scanner and separators and you find that your documents aren't separating properly, try using *duplex separators*. Duplex separators are something that you print yourself. Just print the same separator on both sides of the paper.

Overlapping Jobs

When two jobs touch on the same folder(s), FileConvert may give you a warning or it may disable one of the jobs. Here are some common problems and how FileConvert handles them:

Same Input Folder

Suppose that *Job A* and *Job B* both have the same input folder(s) and both look for the same file types. Since these jobs are directly competing with each other, FileConvert will disable *Job B*.

Overlapping Jobs

Suppose that *Job B*'s input folder(s) are within *Job A*'s input folders, and both jobs look for the same file types. Since some of *Job A*'s input folders are covered by another job, *Job A* will ignore those folders.

Example: *Job A* covers "c:\office" and all of its subfolders. *Job B* covers "c:\office\scans". Both jobs are looking for TIFF images to convert. Because *Job B* is handling "c:\office\scans", *Job A* will ignore that folder, but will still handle the rest of the folders in "c:\office".

Converting a Backup Folder

Suppose that *Job B* is set to convert *Job A*'s backup folder. *Job B* will be disabled.

Example: *Job A* backs up its originals to "c:\backups". However, *Job B*'s input folder is also "c:\backups". Because *Job B* could change *Job A*'s backup files, it will be disabled.

Job Chains

Suppose that *Job A*'s output folder is *Job B*'s input folder. This is a chain, since documents get passed along from one job to the next. There is nothing inherently wrong with this, but it can introduce a risk of creating a loop (see next item). FileConvert may give you a warning if it detects a chain that could turn into a loop.

Example: *Job A* converts files and places them in "c:\office". *Job B*'s input folder is also "c:\office". This isn't a problem unless *Job B* passes its converted files back into *Job A*'s input folder.

Job Loops

Suppose that *Job A*'s output folder is *Job B*'s input folder. Likewise, *Job B*'s output folder is *Job A*'s input folder. This is a loop. FileConvert will not stop you from creating a loop, but realize that it could lead to a never ending conversion run.

Example: *Job A* watches "c:\TIFF" for new TIFF files. It converts them to image-only PDF and outputs them to "c:\PDF". *Job B* watches "c:\PDF" for new image-only PDF files. It converts them to TIFF and outputs them to "c:\TIFF". This creates a loop. A new file will be endlessly converted back and forth from TIFF to PDF and passed back and forth between the folders.

Uninstallation

Uninstall FileConvert from your computer's *Add/Remove Programs* option in the *Control Panel*:

1. From the Windows *Start* menu, select *Control Panel*
2. Select the *Add or Remove Programs* option
3. Locate *FileConvert* in the list of programs
4. Select *Change/Remove* and follow the prompts to uninstall FileConvert

Contact Us

Please don't hesitate to contact us for sales or support assistance. Our contact information is available from the FileConvert *Help* menu > *About FileConvert*.