

Batch Link

Batch Link automatically creates navigational hyperlinks for a group of PDFs. With Batch Link, you can specify the criteria used to create these hyperlinks, or automate the process using file names, page labels or Revu's robust AutoMark technology.

PDFs can come from any source you have access to, including your hard drive, network drives, a Document Management System or any combination of these. They do not need to be open in Revu for Batch Link to work, but they should not be checked out or otherwise locked by anybody else. PDFs need to have searchable text for Batch Link to work on them.

Compatibility

Revu eXtreme 12.0 or higher

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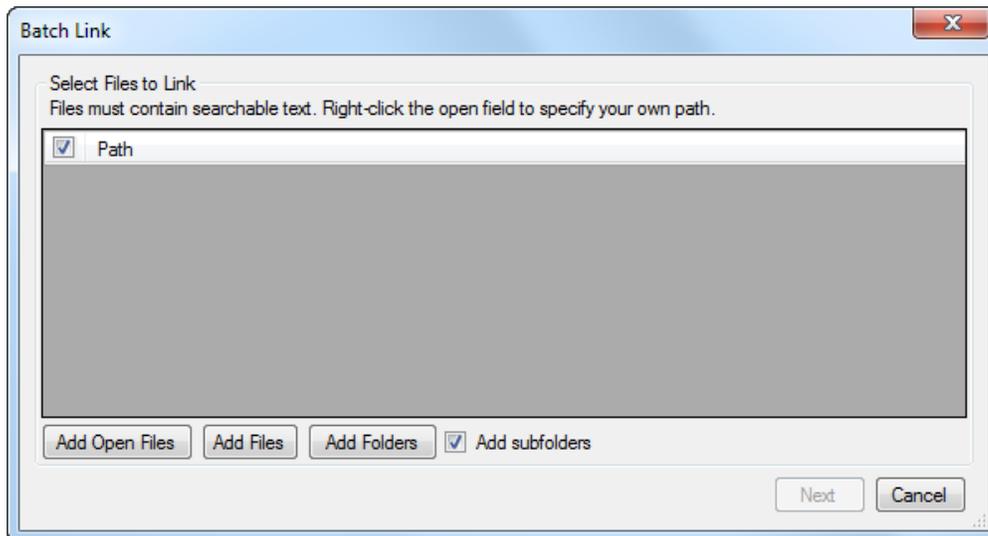


Running Batch Link on Selected PDFs

Batch Link can be run against any number of PDFs or a single, multi-page PDF. There is no need for these documents to be grouped; you can select individual documents or entire folders (including, if desired, subfolders) from a variety of locations: your local hard drive, network drives or a Document Management System.

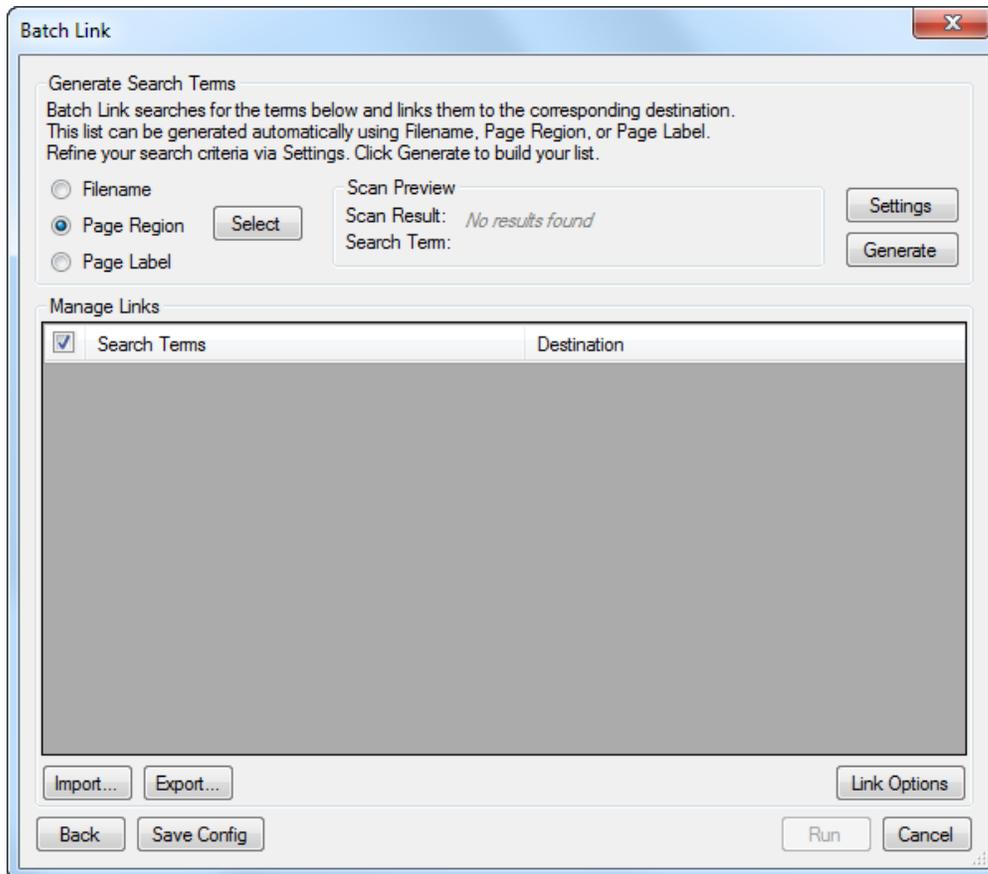
To run Batch Link:

1. From the **Command bar**, go to **File** >  **Batch** >  **Link** > **New**. The **Batch Link** wizard opens.



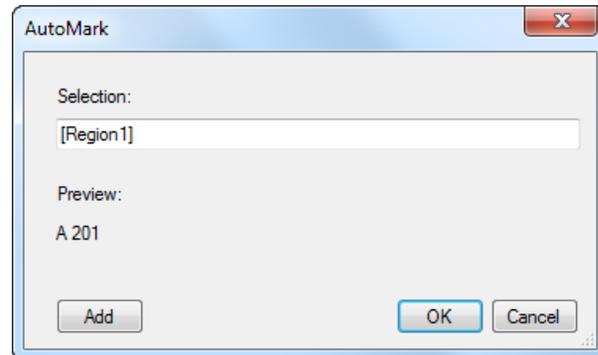
2. Add PDFs to be processed using one or more of the following methods:
 - Click **Add Open Files** to automatically add all PDFs currently open in Revu.
 - Click **Add Files** to browse to specific documents.
 - Click **Add Folders** to browse to a specific folder. PDFs contained within the folder will be processed (though only the folder will show up in the **Path** list). Select **Add subfolders** to automatically add subfolders as well.
 - Right-click inside the **Path** list and select **Insert New**, then manually enter the path to a PDF or a folder in the empty field that appears.
3. By default, any item added to the **Path** list will be selected for processing. Uncheck the box to the left of any item to exclude it from processing.
 - It is possible to include both the path to a specific document and to that document's parent folder. When that happens, there are specific behaviors governing what is processed when one is checked and the other is not:

- If the path to the document is selected and the path to its parent folder is not, the document will be processed but nothing else in the folder will be.
 - If the path to the document is not selected but the path to its parent folder is, all PDFs in the folder, except that document, will be processed.
4. Click **Next**. The second page of the **Batch Link** wizard opens.



5. To import a set of search terms and destinations that were previously saved as a CSV file, click **Import**. Otherwise, use one of the following options to generate search terms and destinations:
- **Filename**: Uses the file name for each PDF included in the batch process as a **Search Term** with the **Destination** being the page itself.
 - **Page Region**: Uses the text found within user-defined regions as a **Search Term** with the **Destination** being the page itself. To define a region:
 - A. Click **Select**. The dialog box disappears, replaced with a crosshair cursor.
 - B. Click and drag to define a region on the PDF. Generally

speaking, the data in this region should be located in the same place on any PDFs being labeled. When the region has been defined, the **AutoMark** dialog box opens.



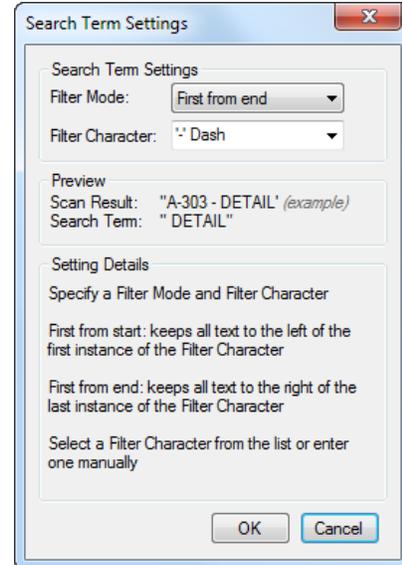
- C. To add another region, click **Add**. The **AutoMark** dialog box disappears, replaced with a crosshair cursor again. Click and drag to define another region. The **AutoMark** dialog box reappears with the new region added to the **Selection** field. There is no limit to the number of regions that can be added.
 - Review the sample page label as shown under **Preview**. If desired, click in the **Selection** field to add text before, after or between **[Regions]**.
- D. When all regions have been defined, click **OK**. The **AutoMark** dialog box closes, replaced by the previous dialog box.

Note: AutoMark is most suitable for documents that are vector-based, are the same size and have the same registration. AutoMark might not work as expected if the pages are different sizes, if some of the pages are not searchable or if the scans are not properly registered.

- **Page Label:** Uses the predefined page label for each PDF included in the batch process as a **Search Term** with the **Destination** being the page itself.
6. Click **Settings**. The **Search Terms Settings** dialog box opens.

A. Select a combination of **Filter Mode** and **Filter Character** to automatically filter search terms, as desired.

- **Filter Mode: First from start:** Keeps all text from the start of the Scan Result to the first occurrence of the **Filter Character**.
- **Filter Mode: First from end:** Keeps all text from the last occurrence of the **Filter Character** to the end of the Scan Result.
- **Filter Character:** Select one of the available characters or manually enter one.



See the **Preview** for an example of the results.

B. Click **OK**.

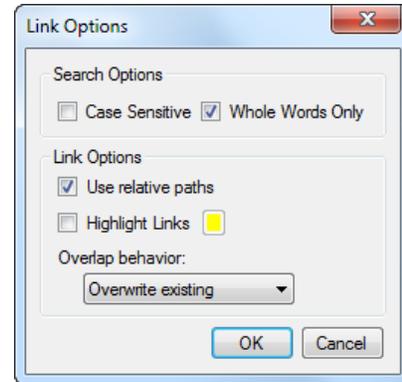
7. Click **Generate**. The **Manage Links** list is automatically populated.
8. Select any **Search Term** or **Destination** to edit it. To manually enter a **Search Term** and **Destination**, right-click inside the **Manage Links** list and select **Insert New** to add a new row. There are four types of hyperlinks that are supported and each requires specific syntax. Based on the type of hyperlink desired, use the appropriate syntax as shown below:

Type of Hyperlink	Syntax
Link to file	<filename>
Link to page in file	page <#> in <filename>
Link to place ¹ in file	place "<place name>" in <filename>
Link to URL	web <url>

¹ It is recommended, but not mandatory, that the place name be surrounded by quotes (") as in the example.

9. Click **Link Options**. The **Link Options** dialog box opens.

- A. Select any or all of the desired **Search Options**.
 - B. Select **Use relative paths** to create links that use relative paths or leave this box unchecked to use full paths instead.
 - C. To place rectangular highlights over hyperlinks placed by Batch Link, select **Highlight Links** and choose a color by clicking the box immediately to its right.
 - D. Choose an **Overlap behavior** that will determine what the process will do when it attempts to place a hyperlink where one already exists.
 - E. Click **OK**. The **Link Options** dialog box closes.
10. To save the current list of search terms and destinations, click **Export**.
 11. To save the current Batch Link configuration, including selected PDFs, search terms and destinations, as well as settings and link options, click **Save Config**.
 12. Click **Run**. The **Batch Link Summary** report opens (see [Batch Link Summary](#) below for more information regarding the report).

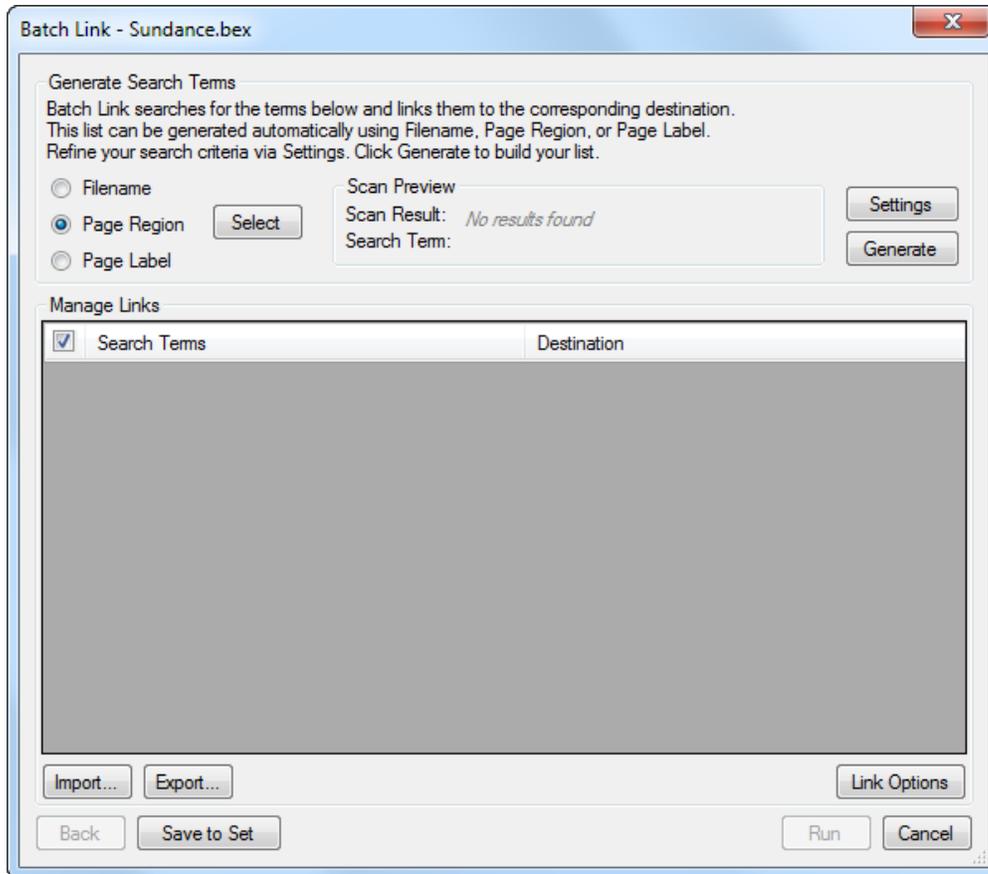


Running Batch Link on a Set

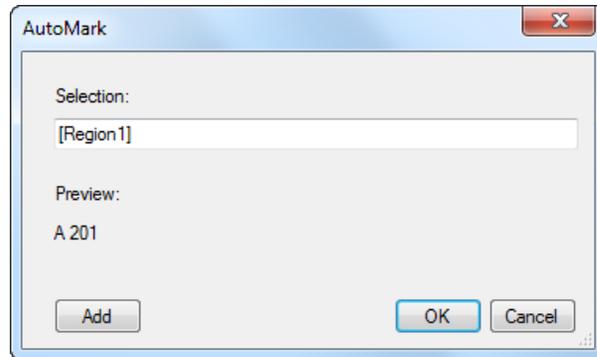
When you run Batch Link on a group of otherwise unrelated PDFs (as in [Running Batch Link on selected PDFs](#) above), the first thing you have to do is select the PDFs you want to link. When it comes to a Set, however, the group of PDFs is already defined, bypassing that part of the process.

To run Batch Link on a Set:

1. Open the Set to be processed.
2. From the **Command bar**, go to **File** >  **Batch** >  **Link** > **Current Set**. The Batch Link wizard opens to the second page.



3. To import a set of search terms and destinations that were previously saved as a CSV file, click **Import**. Otherwise, use one of the following options to generate search terms and destinations:
 - **Filename**: Uses the file name for each PDF included in the batch process as a **Search Term** with the **Destination** being the page itself.
 - **Page Region**: Uses the text found within user-defined regions as a **Search Term** with the **Destination** being the page itself. To define a region:
 - A. Click **Select**. The dialog box disappears, replaced with a crosshair cursor.
 - B. Click and drag to define a region on the PDF. Generally speaking, the data in this region should be located in the same place on any PDFs being labeled. When the region has been defined, the **AutoMark** dialog box opens.



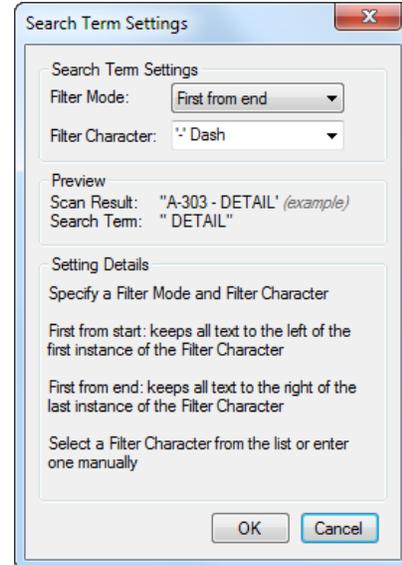
- C. To add another region, click **Add**. The **AutoMark** dialog box disappears, replaced with a crosshair cursor again. Click and drag to define another region. The **AutoMark** dialog box reappears with the new region added to the **Selection** field. There is no limit to the number of regions that can be added.
- Review the sample page label as shown under **Preview**. If desired, click in the **Selection** field to add text before, after or between **[Regions]**.
- D. When all regions have been defined, click **OK**. The **AutoMark** dialog box closes, replaced by the previous dialog box.

Note: AutoMark is most suitable for documents that are vector-based, are the same size and have the same registration. AutoMark might not work as expected if the pages are different sizes, if some of the pages are not searchable or if the scans are not properly registered.

- **Page Label:** Uses the predefined page label for each PDF included in the batch process as a **Search Term** with the **Destination** being the page itself.
4. Click **Settings**. The **Search Terms Settings** dialog box opens.

A. Select a combination of **Filter Mode** and **Filter Character** to automatically filter search terms, as desired.

- **Filter Mode: First from start:** Keeps all text from the start of the Scan Result to the first occurrence of the **Filter Character**.
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- **Filter Character:** Select one of the available characters or manually enter one.



See the **Preview** for an example of the results.

B. Click **OK**.

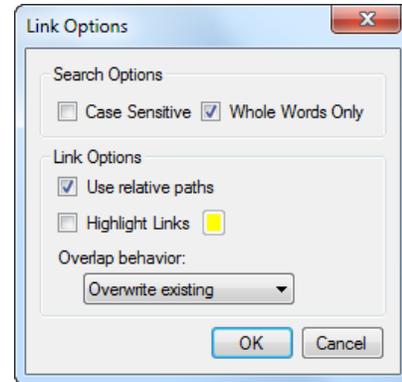
5. Click **Generate**. The **Manage Links** list is automatically populated.
6. Select any **Search Term** or **Destination** to edit it. To manually enter a **Search Term** and **Destination**, right-click inside the **Manage Links** list and select **Insert New** to add a new row. There are four types of hyperlinks that are supported and each requires specific syntax. Based on the type of hyperlink desired, use the appropriate syntax as shown below:

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¹ It is recommended, but not mandatory, that the place name be surrounded by quotes (") as in the example.

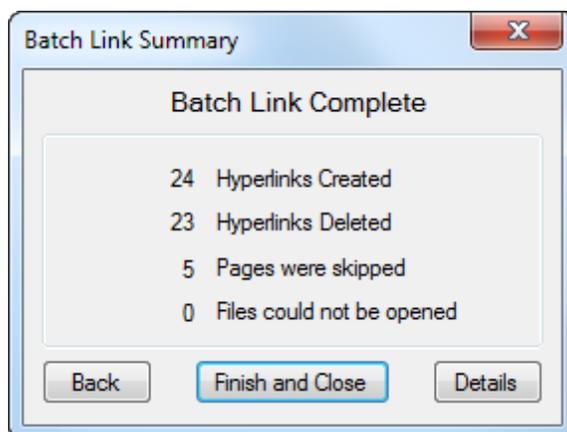
7. Click **Link Options**. The **Link Options** dialog box opens.

- A. Select any or all of the desired **Search Options**.
 - B. Select **Use relative paths** to create links that use relative paths or leave this box unchecked to use full paths instead.
 - C. To place rectangular highlights over hyperlinks placed by Batch Link, select **Highlight Links** and choose a color by clicking the box immediately to its right.
 - D. Choose an **Overlap behavior** that will determine what the process will do when it attempts to place a hyperlink where one already exists.
 - E. Click **OK**. The **Link Options** dialog box closes.
8. To save the current list of search terms and destinations, click **Export**.
 9. To save the current Batch Link configuration, including selected PDFs, search terms and destinations, as well as settings and link options, click **Save to Set**.
 10. Click **Run**. The **Batch Link Summary** report opens (see [Batch Link Summary](#) below for more information regarding the report).



Batch Link Summary

After Batch Link has been run, a **Batch Link Summary** dialog box opens and reports the results of the process.



The following information is provided:

- **Hyperlinks Created:** The number of new hyperlinks created by the process.
- **Hyperlinks Deleted:** The number of old hyperlinks that were deleted (according to the Overlap Behavior defined in the Link Options) by the process.
- **Pages Skipped:** The number of PDF pages that were skipped by the process because they did not contain searchable text.
- **Files that could not be opened:** The number of PDFs that could not be opened by the process.

Click **Details** to view an expanded report of the Batch Link results.

Click **Back** to return to the Batch Link wizard and take the opportunity to correct any issues detected and re-run the process or save a configuration.

Tip: In the **Batch Link** wizard, click either the **Search Terms** or **Destinations** column header to bring all flagged issues to the top.

Click **Finish and Close** to close Batch Link.

