

## **SERFF Print to PDF Function**

Created by  
NAIC – April, 2001

# SERFF Print to PDF Function

## TABLE OF CONTENTS

<b>DESCRIPTION.....</b>	<b>3</b>
<b>SYSTEM REQUIREMENTS .....</b>	<b>3</b>
<b>INSTRUCTIONS .....</b>	<b>3</b>
<b>PRINT TO PDF ISSUES .....</b>	<b>8</b>

## **SERFF Print to PDF Function**

### **DESCRIPTION**

The Print to PDF function allows a SERFF filing to be saved and printed as a PDF type document. Print to PDF combines the Transmittal Header, all of the Component Headers, all of the attached PDF documents, Reports and the Filing/Reviewer Notes into one document. This file can then be used to allow for public access, sent to an imaging system and/or archived. (The amount of time that it takes for the PDF document to be created depends on the size of the filing. It could take up to several minutes to create a PDF document from a large filing.)

It is important to note that if a filing includes an attached file that is not a PDF file type, the attachment will be skipped and will not be included in the resultant Print to PDF file. If a state requires an attachment such as an Excel spreadsheet for its formulas, but also wants the entire filing to print to PDF, the workaround is to ask filers to create a PDF of the spreadsheet and attach it alongside the native format file. The Component Header will arrive with an Excel attachment on it and also a PDF version of that Excel file attached next to it. Print to PDF will print the Component Header, skip the Excel file, and pick up the PDF version of that Excel file.

### **SYSTEM REQUIREMENTS**

1. Acrobat Reader or Adobe Acrobat Full-Version. The Adobe Acrobat Reader can be downloaded free of charge from the following website:  
<http://www.adobe.com/products/acrobat/>
2. Internet Explorer

### **INSTRUCTIONS**

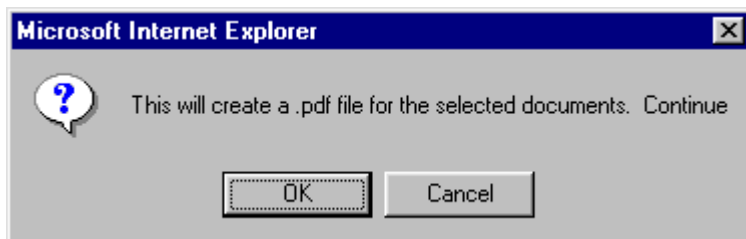
#### **I. Creating the document**

1. Log into SERFF.
2. Go to the SERFF Workspace View.
3. Expand the blue twisties until a Transmittal Header is displayed.
4. Click the check box next to one of the Transmittal Headers. (Do not click the check boxes for the Component Headers, Notes or Reports. SERFF will print the entire filing based on the Transmittal Header selected.) While the Filer/Reviewer Notes will be part of the PDF file, they will not print in the correct order because they do not have a SERFF Tracking Number associated with them. You will find these Notes at the end of the PDF document.
5. Click the 'Print to PDF' button.

## SERFF Print to PDF Function



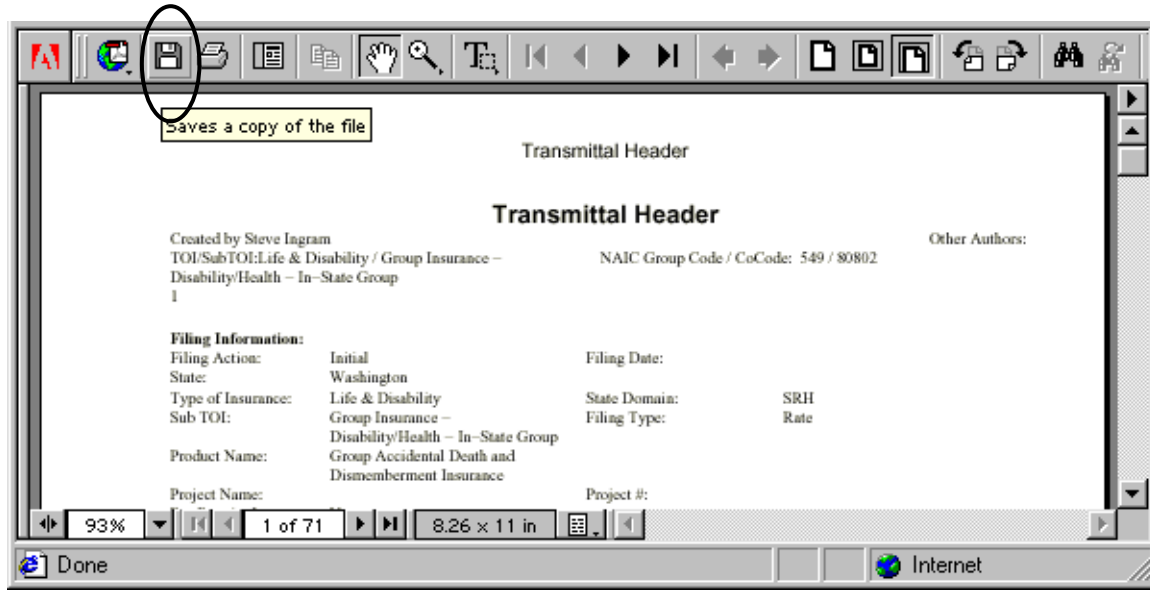
A Windows dialog box will appear asking for confirmation to create the PDF file.



6. Click 'OK'.

Another instance of the browser will open as the processing begins. After it is complete, the PDF file will be displayed. The amount of time that it takes to process depends on the size of the filing, particularly the number of Component Headers and attachments.

## SERFF Print to PDF Function



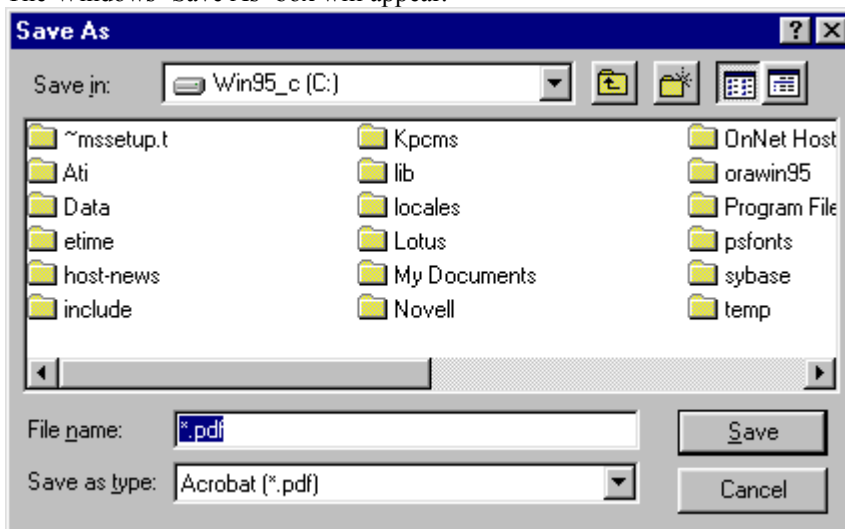
### II. Saving the document

This document can be saved as a PDF file or as an HTM file.

#### To save the document as a PDF file:

1. Click the 'diskette' icon from the browser screen where the document is displayed.

The Windows 'Save As' box will appear.



2. Name the file and save it to a directory on the workstation.

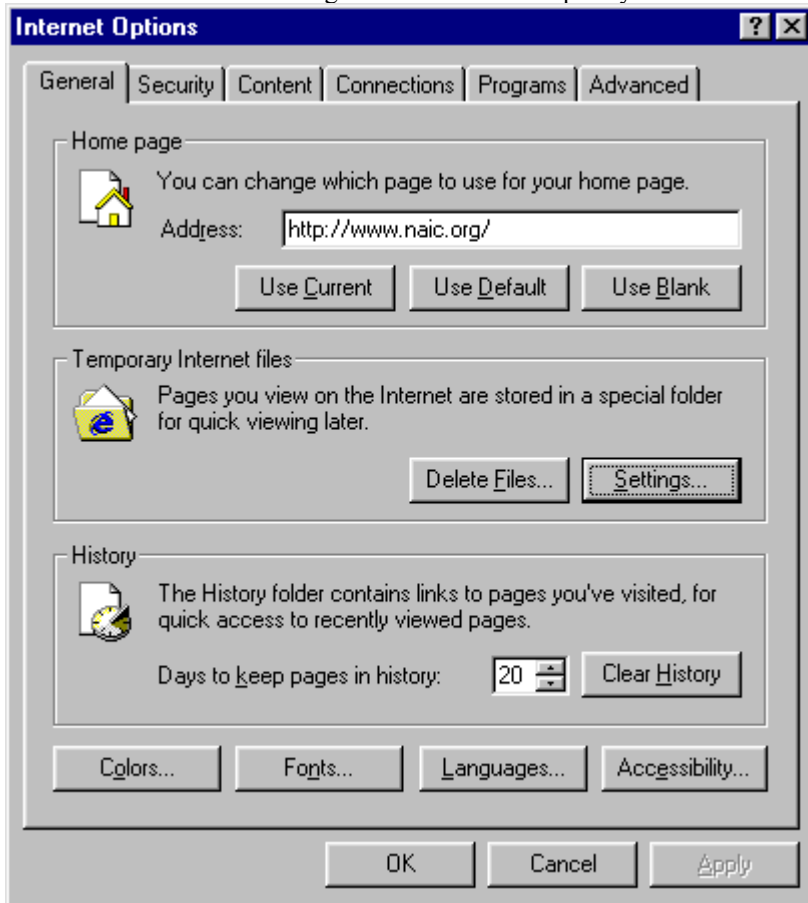
#### To save the file as HTM:

The file is automatically saved as an HTM file with the SERFF Tracking Number as the name in the temporary internet folder. This folder is set through the internet browser. To find the location of the temporary internet folder:

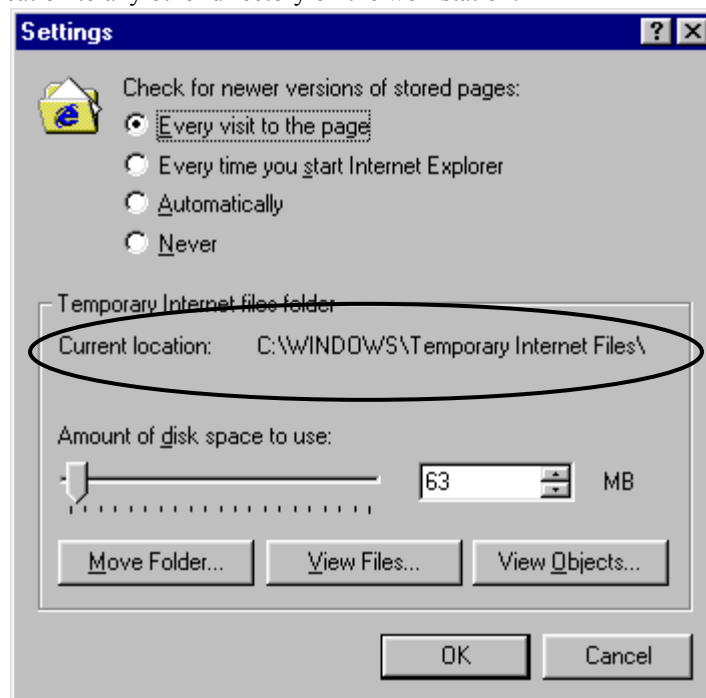
1. Open Internet Explorer
2. Click on 'Tools' from the menu bar.

## SERFF Print to PDF Function

3. Select 'Internet Options'.
4. Click on the 'General' tab.
5. Click the 'Settings' button in the 'Temporary Internet Files' box.



The temporary files are being stored in the path that is displayed next to 'Current location:'. The files can be copied from this location to any other directory on the workstation.

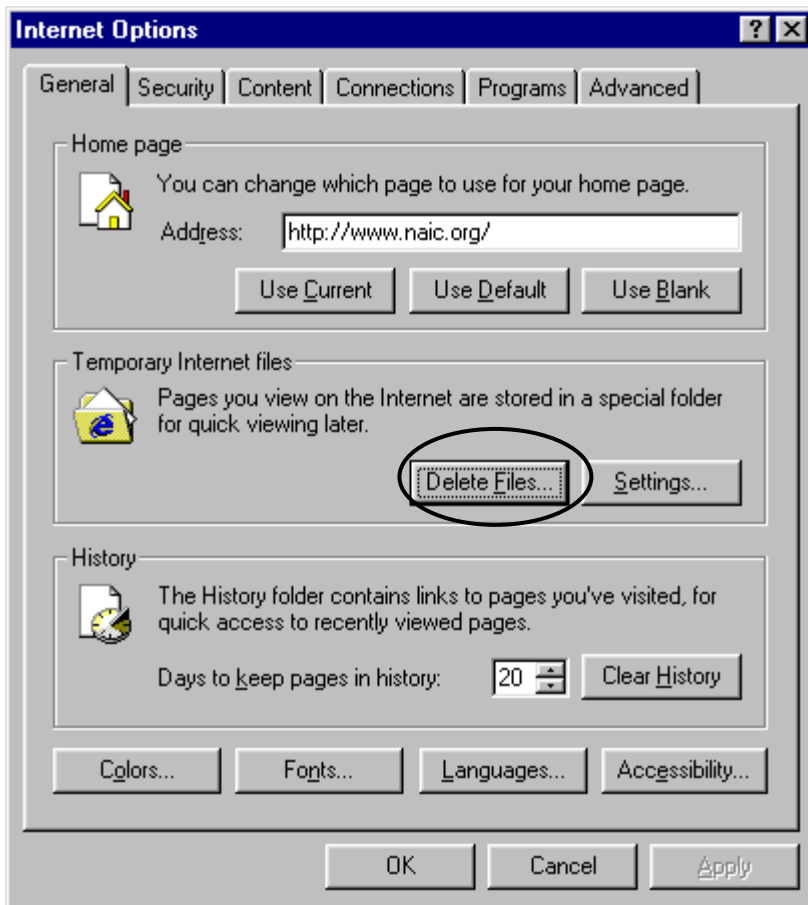


## SERFF Print to PDF Function

### III. Deleting Temporary Files

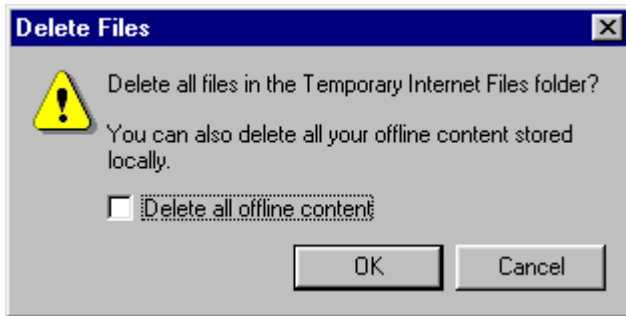
Since the temporary internet files are being stored each time the function is used, the temporary internet folder will need to be cleared periodically so that the disk does not become full. If the disk is full, the print to PDF process will not run as efficiently. To clear the temporary internet folder:

1. Open Internet Explorer
2. Click on 'Tools' from the menu bar.
3. Select 'Internet Options'.
4. Click on the 'General' tab.
5. Click on the 'Delete Files' button in the 'Temporary Internet Files' box.



## SERFF Print to PDF Function

6. A Windows dialog box will appear asking for confirmation before deleting.



7. Click 'OK'.

### PRINT TO PDF ISSUES

1. Print to PDF prints the entire filing. Users cannot select only certain parts of the filing to print.
2. Print to PDF will not work if ANY attached document has security applied.
3. Several fields will be missing from the resultant PDF file.  
Industry missing fields:
  - State Domain and State Mail-In Prefix - Transmittal Header
  - Requirement Status – Component Header
  - Subject – Note to Filer
  - Comments – Note to Filer
  - Status Effective Date – Disposition ReportState missing fields:
  - Filer's Notes – Component Header
  - Requirement Status - Component Header
  - Applies to Components – Problem Report
  - Subject – Note to Filer
  - Comments – Note to Filer
4. If a filing has an attached document that is not a PDF type document, it will not be included in the resultant PDF file.
5. The Print to PDF function may display data differently than the "Printable Version" button. These two methods may display the data in a different order or may display different headings and subheadings.