PDF-Tools V6
USER MANUAL

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1 Welcome

PDF-Tools V6

PDF-Tools is one of the most advanced and customizable software tools available worldwide. It's a dynamic and user-friendly solution for the creation and manipulation of industry-standard PDF and image files. We have greatly innovated and enhanced our software; **PDF-Tools** is the most sophisticated version to date. Featuring twenty-six standard tools, as well as the option to clone, edit and create fully-customizable tools, it's the ideal software to compliment your existing PDF facilities. **PDF-Tools** requires no additional 'plug-ins' or applications. It optimizes the efficiency of your projects and meets highly-specific demands with ease.

There are two further Tracker Software products included in this bundle:

PDF-XChange Editor – one of the fastest and most feature-rich options available to view, edit, modify and OCR image-based PDF files. See **here** 198 for the **PDF-XChange Editor** user manual.

PDF X-Change Lite – our award-winning technology that installs as a virtual printer and can be used to print-to-PDF from all Windows applications. See **here** 612 for the **PDF X-Change Lite** user manual.

We offer several further cutting-edge applications for the manipulation of PDF and image files. Further details are available at the **Tracker Software Products Page.**

Our goal is to provide software to generate truly optimized PDF files that retain their original format. If you have any queries please **Contact Us** - we aim to respond to all communication within half an hour.

Use the **Table of Contents** on the left to browse the topics of this manual. Click topics to expand them.

Click the icons above the chapter headings to search the following:

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Installation instructions are available **here.** 14

A PDF version of this manual is available **here.**

1.1 System Requirements

System Requirements

PDF-Tools supports all Windows (32/64 bit) operating systems from Windows XP and later:

Figure 1. Supported Operating Systems

Please note that, although many users have virtualized some of our component products such as the PDF-XChange Viewer and PDF-Tools application using XenApp, we do not support this at this time. Specifically, the printer drivers are not designed to work in a virtualized environment.

1.2 Installation

Installation

Follow these steps to install **PDF-Tools**:

1. Use the link in your purchase confirmation email or click either of the links below to download the evaluation version of **PDF-Tools**:
PDF-Tools (includes the trial version of **PDF-Tools**).
PDF-XChange Pro (includes the live version of **PDF-Tools**. A serial key/activation code is required for this option).

2. When the download is complete, click the **PDFTools6.zip** file to open the containing folder. (**Winzip** and **CnetsDownload.com** have free downloads available if you require software to unzip files).

3. **PDF Tools6** is displayed next to an icon. Double-click either the text or the icon to open the **Run/Cancel** dialog box.

4. Click **Run** to open the **PDF-Tools V6 Setup.**

5. Click **Install.**

Please note that the first time you run the installer you will be prompted to enter your registration number/activation code. We recommend that you copy and paste this from your receipt to avoid mistakes.

If you have already installed the evaluation version of PDF-Tools then there is no need to install it again. Follow these steps to register:

1. Open **PDF-Tools** and click **Preferences** in the Main Toolbar.

2. In the **Preferences** dialog box, point to the **Categories** menu. Click **Registration** to open the Registration Info dialog box

3. Click **Add new Serial Key** to open the **Add New Serial/License Key** dialog box.

4. Click **Paste Key from Clipboard** or enter the details into the text box manually.

5. Click **Continue** to register.

Alternatively, the **XCVault.exe** file attached to your invoice can be used to register your license with **PDF-Tools.** Click the file and the software will register and update automatically. The trial version of **PDF-Tools** must first be installed to do this, which is available **here.** The **XCVault.exe** file can also be accessed from your online account with Tracker Software. Login at the **main website** and move to the **Your Products & Serial Numbers** tab:
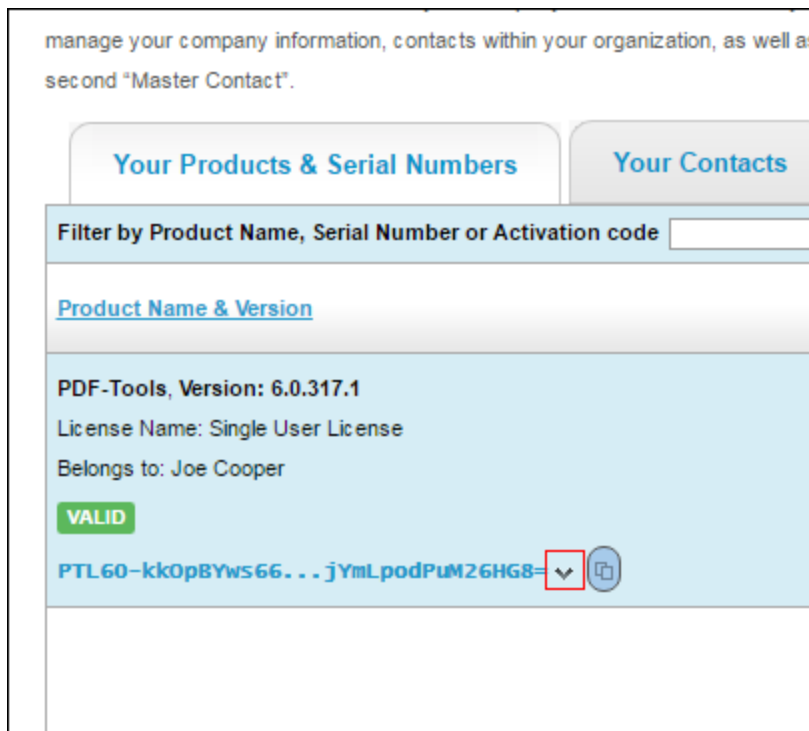
Figure 1. Your Products & Serial Numbers Tab

Click the arrow icon to open the serial key/activation code window. It can then be copied to your clipboard or downloaded as required.

VERY IMPORTANT

The serial key/activation code is unique to you/your company. Tracker Software Products uses an **FTP Automatic Update** to ensure that the latest version is always available to our clients. If you have purchased a single copy of the software it will allow only one user to update their copy. Similarly, if you have purchased a multipack license, then an equal amount of users will be able to update their software. Please keep your serial key/activation code safe. Do not share it with other parties, as doing so constitutes an illegal breach of

copyright. If we discover evidence of abuse then updates will be disabled for your account. Serial keys/activation codes found on websites offering free and illegal software distribution will be disabled immediately. We monitor such websites on a daily basis. Help us safeguard the integrity of our products to ensure that their future development is made possible. Theft of our software deprives us of investment that improves our products for the benefit of all clients.

Switches for MSI Installers

Switches for MSI Installers

The MSI switches detailed in the table below are available for installation with **PDF-Tools.**

The command line for installation is: **msiexec /Option <Required Parameter> [Optional Parameter] [PROPERTY=PropertyValue]**

OPTIONS	PARAMETER	DEFINITION
		Install Options
/package or /i	**<Product.msi>**	Installs or configures the product specified.
/a	**<Product.msi>**	Installs the product specified on the network as an administrative install.
/j<u|m>	**<Product.msi>**	Advertises the specified product. "**m**" advertises to all users, "**u**" advertises to current user. Additional parameters are available: **[/t <Transform List>]** **[/g <Language ID>]**
/uninstall | /x	**<Product>**	Uninstall the specified product. The parameter can be an .msi file or the product code.

Display Options		
/quiet	N/A	Quiet mode. This installs the application without user interaction.
/passive	N/A	Unattended mode. The user will see only the progress bar.
/q[n|b|r|f]	N/A	Sets the user interface level: **n** - No UI **b** - Basic UI **r** - Reduced UI **f** - Full UI (default)
Restart Options		
/norestart	N/A	Disables the automatic system restart when installation is complete. (Please note that many Tracker Software products require a restart to function properly).
/promptrestart	N/A	Prompts the user for restart if necessary.
/forcerestart	N/A	Forces a system restart when installation is complete.
Logging Options		
/l	**<LogFile>**	Defines the logging level for installation. Possible modifiers are as follows: **a** - start up of actions. **c** - initial UI parameters.

		e - all error messages.
		i - status messages.
		m - out of memory or fatal exit information.
		o - out of disk space messages.
		p - terminal properties.
		r - action-specific records.
		u - user requests.
		v - verbose output.
		w - nonfatal warnings.
		x - extra debugging information.
		+ - append to existing file.
		! - flush each line to the log.
		***** - log all information except for verbose output and extra debugging information.
/log	**\<LogFile\>**	Equivalent for **/l*** \<LogFile\>

Repair Options		
/f	**<Product>**	Repairs the product specified. Permitted parameters are either an .msi file or the product code. Possible modifiers are: **p** - only if a file is missing. **o** - if a file is missing or an older version is installed. This is a default setting. **e** - if a file is missing or an equal or older version is installed. **d** - if a file is missing or a different version is installed. **c** - if a file is missing or checksum does not match the calculated value. **a** - forces the reinstallation of all files. **u** - all required user-specific registry entries. This is a default setting. **m** - all required computer-specific registry entries. This is a default setting. **s** - all existing shortcuts. This is a default setting. **v** - runs from source and re-caches the local package.

Additional options and more detailed descriptions are available at the Microsoft website.

Properties

Public properties defined during the installation of **PDF-Tools** can be specified, as well as standard MSI public properties, using the switches detailed in the following table. See here for a complete list of standard public properties.

Standard Properties

ADDLOCAL	**<list of features>**	The value of the **ADDLOCAL** property is a list of features, separated using commas, that install locally. If it is not used then all available options will be installed. The **PDF-Tools V6** installers define the following features: • **F_Viewer** - **PDF-XChange Editor** and its main components. • **F_Plugins** - The Plugins module for **PDF-Exchange Editor.** (This requires **F_Viewer**). • **F_Plugin_SP** – to install the SpellChecker plugin. (This requires **F_Plugins**). • **F_FileOpenPlugin** – to install the plugin that provides support for files secured using "FileOpen". (This requires **F_Plugins**). • **F_ReadOutLoudPlugin** – to install the plugin that provides read-out-loud functionality. (This requires **F_Plugins**). • **F_OCRPlugin** – to install the plugin that allows OCR image based PDF files in the software (This requires **F_Plugins**). • **F_Updater** - to install the updater for Tracker Software Products. • **F_SPPlugin** - to install Sharepoint. • **F_OptimizerPlugin** - to install the plugin that allows PDF files optimization. (This requires **F_Plugins**). • **F_BookmarksPlugin** - to install the plugin that provides advanced bookmark functionality for PDF files. (This requires **F_Plugins**). • **F_PDFAPlugin** - to install the plugin that allows the conversion of PDF files to the PDF/A format. (This requires **F_Plugins**). • **F_SPPlugin** - to install the plugin that allows the software to work with files located on the SharePoint/Office 365 server. (This Requires **F_Plugins**). • **F_GDPlugin** - to install the plugin that allows the software to work with files located on Google Drive cloud storage. (This requires **F_Plugins**). • **F_OFCPlugin** - to install the plugin that allows the opening of MS Office documents directly within the software. (This requires **F_Plugins**). • **F_DBPlugin** - to install the plugin that allows the software to work with files located on Dropbox™. • **F_MDPlugin** - to install the plugin that converts Markdown files to PDF format. • **F_PDFAPlugin** - to install the PDF/A plugin. • **F_VLangs** - additional languages files for **PDF-XChange Editor V6**. (This requires **F_Viewer**).

- **F_BrowserPlugins** - plug-ins for web browsers (MS Internet explorer, Mozilla FireFox, Opera, Safari, and Chrome) that allow the viewing of PDF files inside these browsers. (This requires **F_Viewer**, as well as **F_IEPlugin** and/or **F_NPPlugin**).
- **F_IEPlugin** - the IE plugin. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_NPPlugin** - the Firefox, Chrome and Opera plugin. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_ShellExt** - The extension for Windows Explorer and Windows shell. This has multiple features including the viewing of thumbnails, properties, previews and the inclusion of the **IFilter** component.
- **F_Tools - PDF Tools** and its components.
- **F_Tools_Plugins** - a collection of plugins that extends the functionality of **PDF Tools.** (This requires **F_Tools**).
- **F_TLangs -** additional languages for the localization of **PDF-Tools.** (This requires **F_Tools**).
- **F_Lite** - the **PDF-XChange Lite V6** printer and its related components.
- **F_Langs_Lite** - the language localization files for **PDF-XChange Lite** and its related components. (This requires **F_Lite**).
- **F_KeyInstaller -** the license key installer, which uses an XCVault file. See here 30 for further information.

Product Specific Properties

INSTALLLOCATION	N/A	Specifies the folder where products are installed.
PNAMELITE	**<name>**	Specifies the printer name. The default value is "PDF-XChange Lite V6."
SET_LITE_AS_DEFAULT	N/A	If specified with a value of "1" then **PDF-XChange Lite** will be set as the default printer after installation.
SET_AS_DEFAULT	N/A	If unspecified, or specified with value of "1", then **PDF-XChange Editor** will be set as the default application for PDF files.

VIEW_IN_BROWSERS	N/A	If unspecified, or specified with a value of "1", then **PDF-Tools** will be configured to open PDF files inside browsers.
DESKTOP_SHORTCUTS	N/A	If unspecified, or specified with a value of "1", the installer will place shortcuts for installed applications on the desktop.
PROGRAMSMENU _SHORTCUTS	N/A	If unspecified or specified with a value of "1" then the installer will create a program menu group for installed applications and their components.
USERNAME	**<username e>**	Specifies the username to which applications will be registered.
ORGANIZATION	**<oname>**	Specifies the organization name for which applications will be registered.
USERMAIL	**<email>**	Specifies the user email.
KEYFILE	**<xcvault file>**	Specifies the UNC location of the license vault file <filename>.xcvault.
KEYDATA	**<regkey>**	Specifies the registration key in plain text.
EDITOR_LANGUAGE	**<id>***	Specifies the UI language for the software. (This requires **F_Vlangs**).
DDEFLANGID	**<id>****	Specifies a language for the print driver. (This requires **F_Langs_Lite**).

PDEFLANGID	**<id>****	Specifies a language for **PDF Tools V6.** (This requires **F_TLangs**).
NOUPDATER	N/A	If unspecified, or specified with a value of "0", then the updater will be installed. If specified with a value of "1" then the Updater will not be installed. For example "NOUPDATER=0" will result in the installation of the updater.
SCHEDULEUPDATER	N/A	If unspecified or specified with a value of "1", then the installer will add a task to the task scheduler that checks periodically for software updates.

*The <id> for target languages is available here. The "Language Culture Name" is used with **EDITOR_LANGUAGE.** For example German is "**de-DE**".

** The <id> for target languages is available here. The "Culture Code" must be used for **DDEFLANGID** and **PDEFLANGID**. It is in hexadecimal value, it must be converted to decimal for use. For example German has the hexadecimal value 0x0407 and therefore the decimal 1031 must be used. A hexadecimal to decimal converter is available here.

Command Line Examples

- Install the software in quiet mode, with a basic UI, to the folder "C:\Program Files\My PDF Applications":

```
msiexec /i ToolsV6.x86.msi /qb INSTALLLOCATION="C:\Program Files\My PDF
Applications"
```

- Install the software in quiet mode, with a basic UI, to the default folder and specify the user license information:

```
msiexec /i ToolsV6.x86.msi /qb USERNAME="Dave" USERMAIL="abc@a.b.c"
KEYFILE="\UNC\path\to\xcvaultfile"
```

- Install the software with all features, German as the UI language, in quiet mode and with and a basic UI (Please note that **ADDLOCAL** is not being used, therefore all components, including **F_VLangs,** are installed:

```
msiexec /i ToolsV6.x86.msi /qb EDITOR_LANGUAGE="de-DE"
```

- Install the software in quiet mode, with a basic UI, with specific features only: Editor, Spellcheck and OCR plugins are included. **FileOpen** and **ReadAloud** plugins are not included. The browser plugin for IE only is included. German is defined as the UI language. A 'basic' UI is defined. **ADDLOCAL** is used, therefore only the features specified will be installed and **F_VLangs** must be specified separately:

```
msiexec/i ToolsV6.x86.msi /qb
ADDLOCAL="F_Viewer,F_Plugins,F_Plugin_SP,F_OCRPlugin,F_VLangs,F_BrowserPlug
ins,F_IEPlugin" EDITOR_LANGUAGE="de-DE"
```

Switches for EXE Installers

Switches for EXE Installers

Our binary EXE installers support both 32 and 64 bit versions of MS Windows. However, the Microsoft MSIN is not always compatible with a a unified 32/64 bit installation. If there is any uncertainty about the details of the system onto which **PDF-Tools** is being installed, we recommend using the EXE installer. This is because it has the functionality to understand computer specifications and makes the best possible choice. A second option is to use the 32 bit MSI installer, as it functions correctly in both 32 or 64 bit systems. However, it does not take full advantage of hardware capabilities and fewer Shell Extension features are available.

The command line for installation is: **PDFXTools6.exe/Option [Optional Parameter] [PROPERTY=PropertyValue]**

The EXE switches detailed below are available for installation with **PDF-Tools**:

OPTIONS	PARAMETER	DEFINITION
		Install Options
/install	**<Product>**	Installs the product specified. This is the default setting.
/uninstall	**<Product>**	Uninstalls the product specified.
/layout	N/A	Creates a complete local copy of the bundle in the directory.
		Display Options (Please note that the default setting is for the UI and all prompts to be displayed).

/passive	N/A	Displays a minimal UI with no prompts.
/quiet	N/A	Display no UI and no prompts.
Restart Options		
/norestart	N/A	Suppresses any attempts to restart by the system. The default setting is for the UI to prompt before restarts take place.
Logging Options		
/log	**<LogFile>**	Logs to a specific file. The default setting is for a log file to be created in %TEMP%. This is also the case if no path is specified.
Repair Options		
/repair	N/A	Repairs existing installations of the product.
Product Specific Properties		
USERNAME	**<username>**	Specifies the username for which applications are registered.
ORGANIZATION	**<oname>**	Specifies the organization name for which applications are registered.

USERMAIL	<email>	Specifies the user email.
SET_AS_DEFAULT	N/A	If this property is not specified, or is specified with a value of "1", then **PDF-XChange Editor** will be set as the default application for viewing PDF files.
VIEW_IN_BROWSERS	N/A	If this property is not specified, or is specified with a value of "1", **PDF-XChange Editor** will be configured to open PDF files within browsers.
EDITOR_LANGUAGE	<id>*	Specifies a language for **PDF-XChange Editor.**
DESKTOP_SHORTCUTS	N/A	If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.
PROGRAMS MENU_SHORTCUTS	N/A	If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.
KEYDATA	<regkey>	Specifies a registration key.
KEYFILE	<xcvault file>	Specifies the UNC location of the license vault file <filename>.xcvault
NOUPDATER	N/A	If this property is not specified, or is specified with a value of "1", then the Updater will be installed. A value of "1" will prevent the Updater from being installed.

* <id> for target languages is available here. The "Language Culture Name" is used with **EDITOR_LANGUAGE.** For example German is "**de-DE**".

Examples

- Install the application in quiet mode to the default install folder "C:\Program Files\Tracker Software":

  ```
  PDFXTools6.exe /quiet
  ```

- Install the application in quiet mode to the default folder and specify the user license information and key as a vault file:

  ```
  PDFXTools6.exe /quiet USERNAME="John Doe"
  USERMAIL="JohnDoe@emailaddress.com" KEYFILE="C:\license\V6Pro.xcvault"
  ```

- Install the application in quiet mode to the default folder and specify the user license information and key as a string:

  ```
  PDFXTools6.exe /quiet USERNAME="John Doe"
  USERMAIL="JohnDoe@emailaddress.com" KEYDATA="PVP60 - ZJ2J77DN5kdBuQRhj ...
  dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

Licensing

Licensing

Since version 5.5 and build 308 **Tracker Software Products** has moved to a new serial key licensing system. The new system offers both the standard serial key method of licensing our applications as well as the option to use a license file. The license file is known as an "XCVault" file, which is a modified .ZIP file. The main benefit of this feature is that there is no longer a need to re-install the software if you are using an evaluation version and intend to upgrade. Follow the steps below to access and activate XCVault files:

1. Login to your account with **Tracker Software Products.**

2. Move to the "**Your products and Serial numbers**" tab.

3. Move to the product for which you would like to download the XCVault file.

4. Click the arrow icon indicated in *(figure 1)*. The window will expand as detailed below:

Figure 1. XCVault File Access Point

5. Click the **Download** button. The XCVault file will then download to the local computer.

6. Click the download icon to launch the XCVault file. All product licenses will then update automatically.

System administrators should note that this information is stored within the Windows Registry. However, the method used to license the application can have an effect on the storage location. When an XCVault file is being used, its information is stored in two locations: **HKCU\Software\Tracker Software\Vault** and **HKLM\SOFTWARE\Tracker Software\Vault.** It should also be noted that license information is stored as a hexadecimal value. Therefore, if a registration key is being used to deploy the license, it is advisable to first license a single machine in order to create the first registration key.

Standard Deployment

Copy and paste serial keys into the installer to implement them during installation. Alternatively, click the personal.xcvault file after installation has taken place.

Silent Deployment

XCVault files can also be used for silent deployment of serial keys after installation has taken place. A windows command line can be used to push the XCVault file to each user that qualifies for a full license. A sample script and associated literal path is detailed below:

C:\Program Files\Tracker Software\Vault>XCVault.exe /s with literal path **D: \Documents\Ref\Personal.xcvault.**

Activating silent deployment is a two-step process. The first step is to call on the XCVault.exe that will apply the key. The second step is to specify the literal path to the personal.xcvault file. The presence of the script means that users are not notified of serial key deployment.

Installing Products to use Protected Keys from the Command Line

The inclusion of XCVault files since version 5.5 and build 308 means that the command line install option **KEY=<regkey>** no longer passes license details to associated products. There are two methods to resolve this issue:

The first method is to use the option **KEYFILE=<xcvault file>** to specify the UNC location of the license vault file <filename>.xcvault. For example: **KEYFILE="C: \Users\JohnDoe\Desktop\Personal.xcvault".**

The second method is use the option **KEYDATA=<regkey>** to specify the registration key with a text string. **For example: KEYDATA="PXP50-Y5EN....cFrBqnyKhv6eOw=".**

The first method is recommended over the second as the new keys are very complex and therefore less suited to being passed as strings at the command line.

2 Features Overview

Features Overview

The twenty-six Standard Tools in **PDF-Tools** feature the functionality detailed in the list below. They are designed to allow the simple and effective manipulation of PDF and image files. All standard file types are supported. A comprehensive list of supported file types is available **here.** [173] Files can be sourced for use with tools from either the user's computer or local scanner - tools will scan documents according to user-defined settings when they run. Tools allow for the merging of multiple documents into single PDF files, as well as the addition/removal of document features such as Bates numbering, headers and footers, backgrounds and watermarks. They can also be used to resize/rotate documents and extract specific pages or page ranges from files into a new file of various formats. Other features include the option to OCR pages, which converts images into encoded text, and the optimization of files, which reduces the file size in order to save space. It is also possible to export image files within documents and save them in different formats, change document properties and add security settings to documents using tools. As well as that, everything outlined above can be combined into single tools using the **Create Tool** [46] or **Clone Tool** [41] functions. This means that users can build their own tools with highly-specific requirements. For example, if a user wants to create a tool to create a PDF file from a text file, add Bates Numbering, resize the document, optimize it and add a timestamp, they can combine these elements of tools into their own custom tool. It will then be available for them to use as they please. The functions below are related to the **Standard Tools** [141]. There are further functions available to add to tools in the **Actions Library.** [55]

- **Convert** [152] files to PDF or PDF/A format.
- **Create** [70] PDF files from image/text files.
- **Scan** [60] documents to create PDF files from scanned documents.
- **Split/Merge** [129] multiple documents into a single PDF file or save them as individual PDF files.
- **Add/Remove** [95] Bates Numbering, Headers and Footers, Page Background and/or Watermarks.
- **Crop** [153] specified pages to edit the visible page area.
- **Resize, Rotate, OCR** [95] and/or **Extract** [155] specified page ranges within documents.
- **Extract Images** [154] to extract raster images from PDF files and save them as separate image files.

- **Optimize** [162] PDF files to reduce their file size.
- **Export** [85] pages from PDF files and save them in raster image, plain text, Powerpoint Presentation or Word Document format.
- **Change Document Properties** [103] to edit properties within files such as title, author, subject and keywords.
- **Secure** [169] PDF files to set passwords for opening and/or editing documents.
- **Add/Remove Digital Signatures** [95] to PDF files.
- **Timestamp** [171] PDF files from authorized servers.
- **Certify** [148] PDF files with certified signatures.

3 **Main Windows**

Main Windows

The **PDF-Tools** user interface has two workplaces: the Standard Tools window and the Edit Tools window.

The Standard Tools window is used to view, select, edit, clone or launch the twenty-six **Standard Tools** 141, as well as any custom tools that the user has created. The Standard Tools are the default tools that come with **PDF-Tools.** Each tool features a Tool Actions Sequence, which dictates how it runs. The Tool Actions Sequence is composed of actions from the thirty-six available actions. When these actions combine together they create the functionality of the tool. For example, the **Convert Files to PDFs** tool is composed of the actions **Ask for Source Files, Convert Files to PDF, Change Document Properties, Save Documents** and **Show Files.** This means that the tool will first ask the user for input files, convert them to PDF format, change the document properties (if desired), save them according to the user's requirements and show them in the containing folder on the desktop.

The Edit Tools window is used to view and customize the actions of tools. Each action has variable parameters that can be adjusted to meet the requirements of the user. Actions can be expanded or collapsed as they appear within the Tool Actions Sequence. When they are expanded the customizable options are visible. When viewing custom tools it is also possible to edit the order in which actions take place, although it is necessary to ensure that they meet the **ordering requirements.** 190

Standard Tools Window

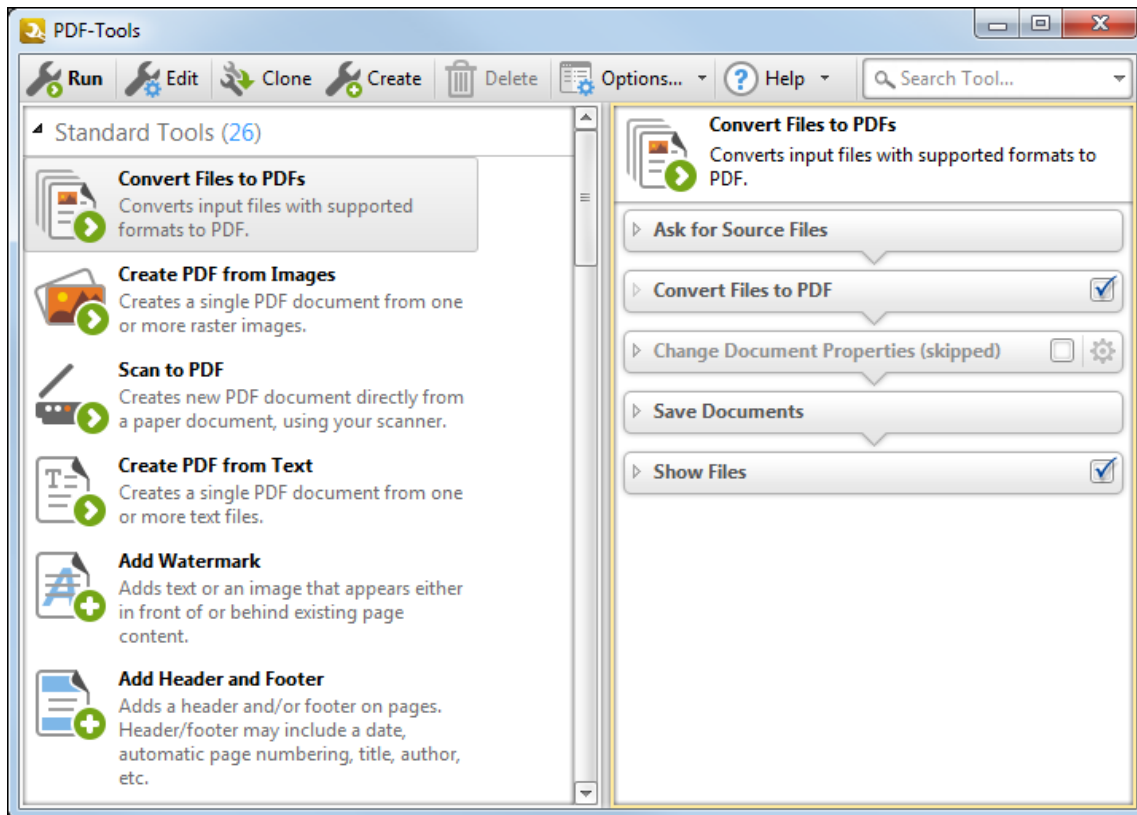The Standard Tools window is displayed below:

Figure 1. Standard Tools Window

The Main Toolbar is at the top of the window. The Standard Tools are displayed beneath the Main Toolbar. The Tool Info Pane is on the right. The **Convert Files to PDFs** tool is selected in the Tool Info Pane.

Main Toolbar

The Main Toolbar has seven buttons. Click them to carry out the following actions:

Run launches the selected tool.

Edit launches the Edit Tools window for the selected tool.

Clone creates a clone of the selected tool for further customization.

Create launches the Edit Tools window to create a new tool.

Delete removes the selected tool. (This is available only for tools that have been cloned or that the user has created. The default Standard Tools cannot be deleted).

Preferences opens the preferences dialog box. See here 51 for further options.

Help opens the help menu.

The Search Tool box is also located in the Main Toolbar. Enter search terms to search tools by their name/description. Use the arrow to view previous search terms.

Standard Tools

The twenty-six **Standard Tools** 141 are displayed in the main window. These are the default tools that come with **PDF-Tools.** They cannot be edited (beyond their basic settings) or deleted, but they can be **Cloned** 41. Cloned tools can be customized to the specific preferences of the user. Alternatively, use the **Create Tool** 46 option to build a brand new tool.

Custom Tools Window

Tools created using the **Clone Tool** 41 and **Create Tool** 46 options are displayed in the Custom Tools window. This is displayed beneath the Standard Tools window.

Tool Info Pane

When a tool is selected in the Standard Tools/Custom Tools window it is displayed in the Tool Info Pane. The name, icon and description is detailed in the upper section. The actions that the tool performs are listed below that in the order that the tool carries them out. There are thirty-six available actions in the **Actions Library** 55, some of which have further settings - see individual chapters for more detail. The ▷ **icon** expands/collapses further settings. A selected box ✓ indicates that the associated action is included in the action sequence of the tool. All boxes are selected by default. Clear a box to skip the action when the tool runs. Mandatory actions do not have a check box. Use the arrow next to actions (where possible) to expand/collapse their settings.

Edit Tools Window

The Edit Tools window is displayed below. The **Convert Files to PDFs** tool is selected:
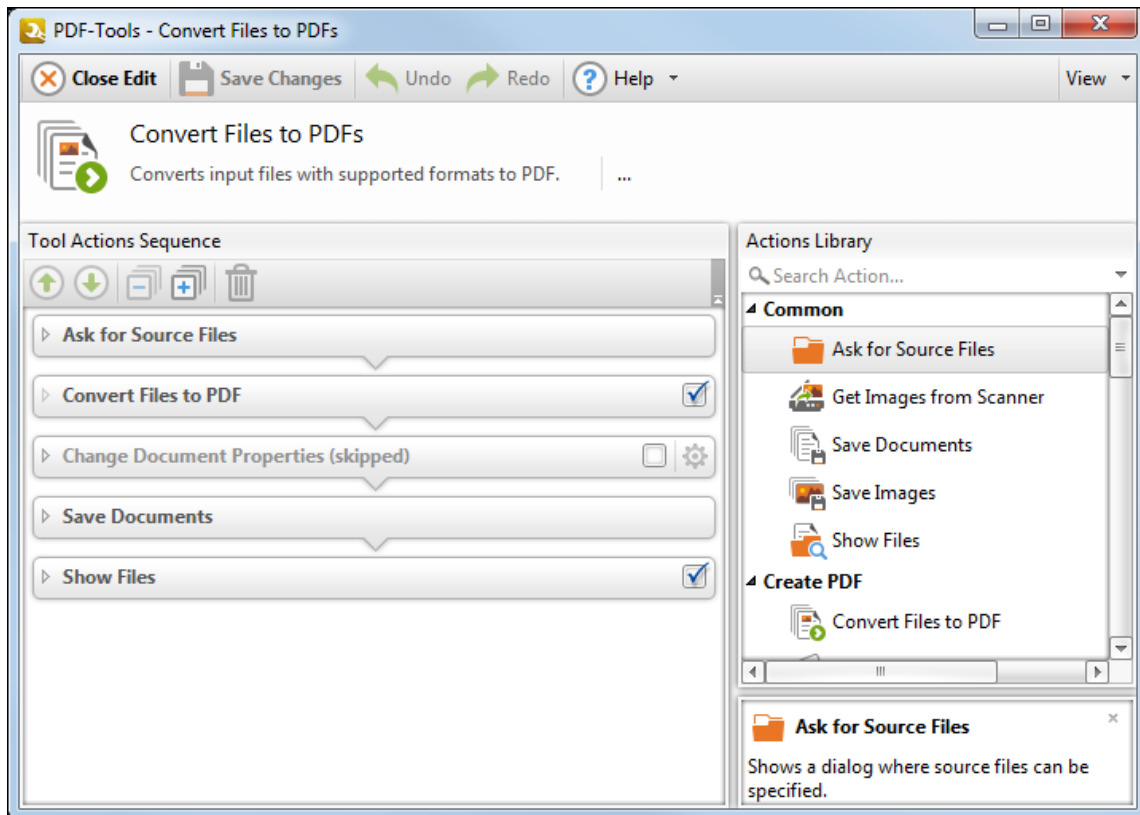
Figure 2. Edit Tools Window

The Edit Toolbar is at the top of the window. The name, icon and description of the selected tool is displayed beneath the Edit Toolbar. The actions that the tool carries out are displayed in the Tool Actions Sequence. The Actions Library is on the right.

Edit Toolbar

The Edit Toolbar has five buttons. Click them to carry out the following actions:

Close Edit ends the current edit.

Save Changes saves any changes since the tool was last saved.

Undo reverses the most recent action.

Redo reverses the most recent undo.

Help opens the help menu.

The **View** menu is also located in the Edit Toolbar. Click the arrow to select options for viewing information about the Actions Library and the actions it contains.

Tool Actions Sequence

The Tool Actions Sequence is used to add, remove and sequence actions that tools perform.
The Tool Actions Sequence for the **Convert Files to PDFs** tool is displayed below:
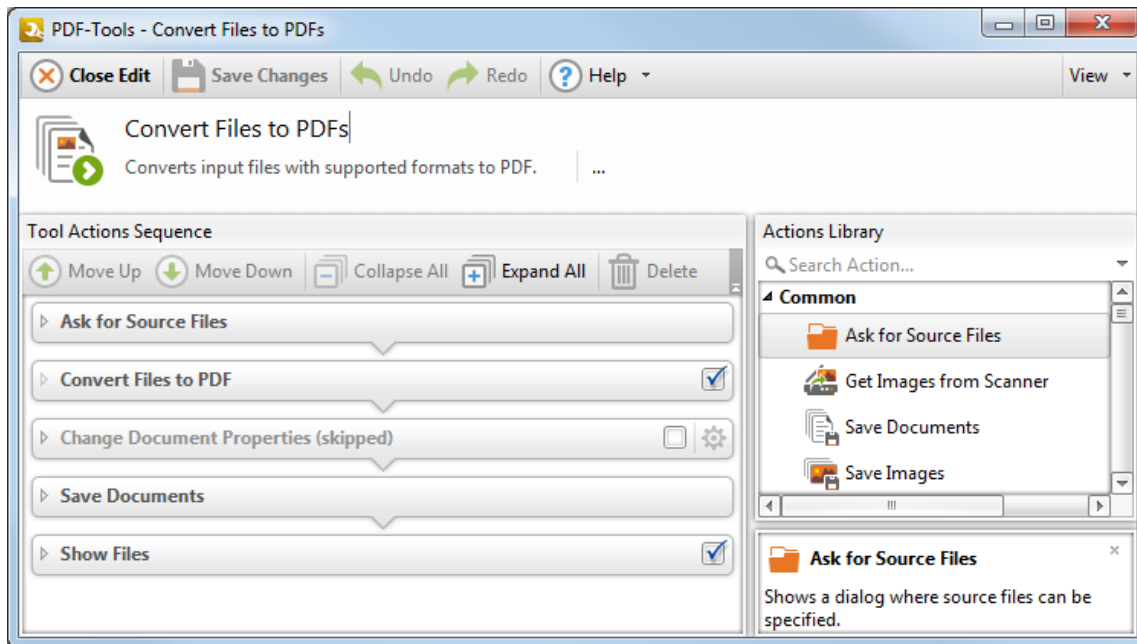
Figure 3. Tool Actions Sequence

The Tool Actions Sequence has five buttons:

- **Move Up** moves the selected action up one step.
- **Move Down** moves the selected action down one step.
- **Collapse All** collapses all expanded actions.
- **Expand All** expands all expandable actions.
- **Delete** removes the selected action from the list.

Please note that it is possible to customize the order of actions within the Tool Actions Sequence of cloned/custom tools only. The order of actions within the twenty-six Standard Tools is fixed.

As with the Tool Info Pane, a selected box ✓ indicates that the associated action is included in the action sequence of the tool. All boxes are selected by default. Clear a box to skip the action when the tool runs. Mandatory actions do not have a check box. Use the arrow next to actions (where possible) to expand/collapse their settings.

Actions Library

The Actions Library displays the thirty-six available actions. When an action is selected a brief description is displayed beneath the Actions Library. See **Actions Library** [55] for a detailed explanation of available actions.

3.1 Clone Tool

Clone Tool

One of the great features of **PDF-Tools** is the option to clone tools. All twenty-six **Standard Tools** 141 can be cloned and customized according to the requirements of the user. This means additional actions from the actions library can be added to the Tool Actions Sequence in order to enhance the function of the Standard Tools. For example, the **Create PDF from Text** tool is used to convert input files into PDF format. It uses five actions from the actions library to do this: **Ask for Source Files, Create PDF from Text, Change Document Properties, Save Documents** and **Show Files.** This means that when the tool is launched it will first ask the user for input files, convert them into PDF format, change document properties, save the files according to the user's specifications and finally display them in the containing folder on the desktop. Once it has been cloned it is then possible to edit the actions that the tool contains. The user can then add or remove actions that feature in the tool's default sequence. For example, the **Show Files** action could be removed and the **Add Watermark, Add Digital Signature and Convert to PDF/A** actions could be added. The tool would then ask the user for input files, convert them into PDF format, change document properties, add a customized watermark and digital signature, convert the files to PDF/A format and save them according to the user's specifications (but not display them in their containing folder on the desktop). It is important to make sure that there are no sequencing errors in the order of actions when cloning tools - see below for further information.

Cloning Tools

Follow these steps to clone tools:

1. Launch **PDF-Tools** to open the Standard Tools window:
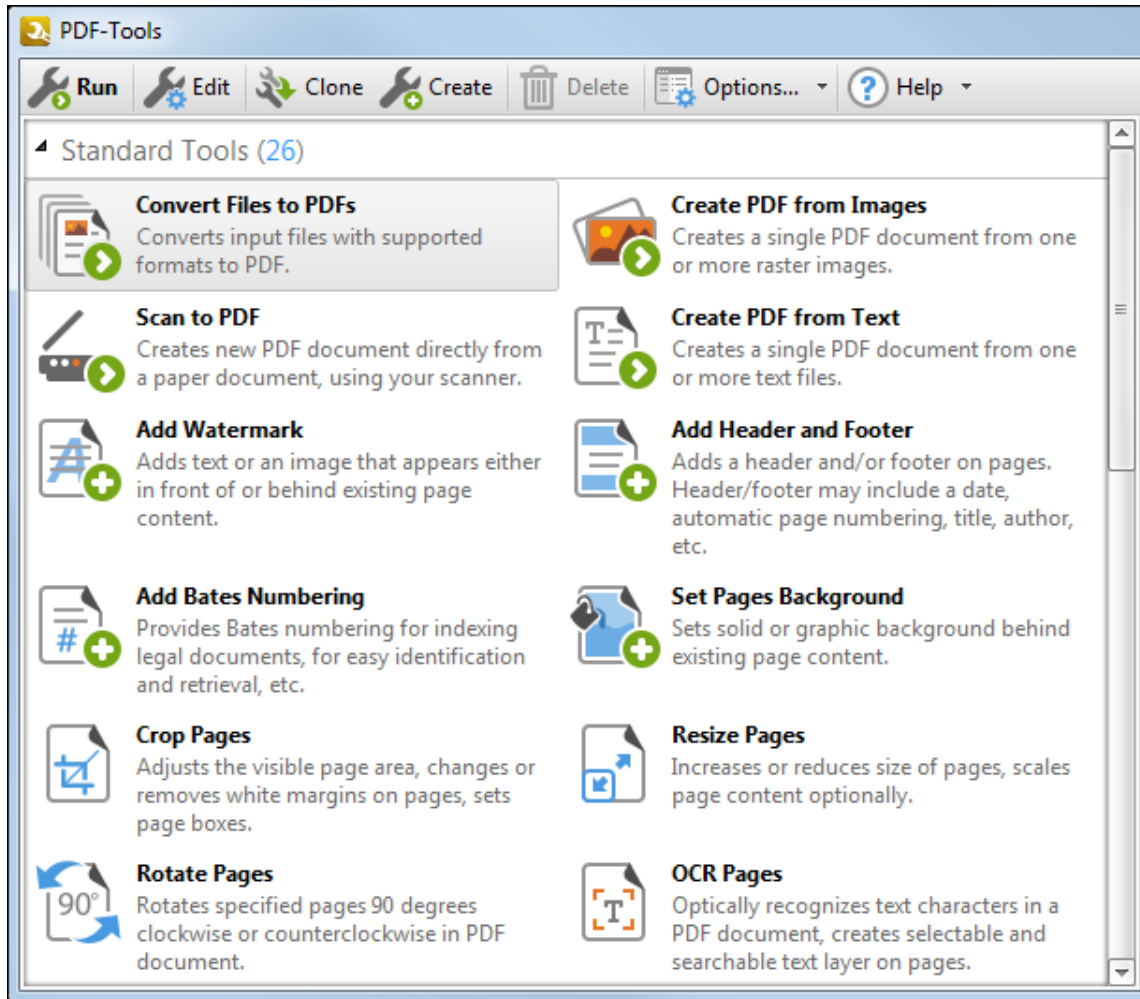
Figure 1. Standard Tools Window

2. Point to the Standard Tool to be cloned and right-click. The following menu will be displayed:
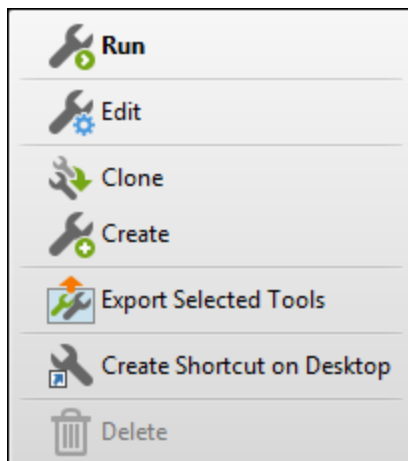
Figure 2. Tool options Menu

3. Click **Clone.**

4. Enter a name for the cloned tool in the **PDF Tools** dialog box. The default name is the title of the Standard Tool followed by **(Copy).** The cloned tool will be displayed in the **Custom Tools** section of the Main Tools Window, which is located beneath the **Standard Tools** section.

Alternatively, select the tool in the Standard Tools Window and click **Clone** in the Main Toolbar.

Editing Cloned Tools

When tools have been cloned their settings are identical to those of the original Standard Tool from which they were cloned. Point to the cloned tool, right-click and select **Edit** to adjust the settings. This opens the Edit Tools Window:
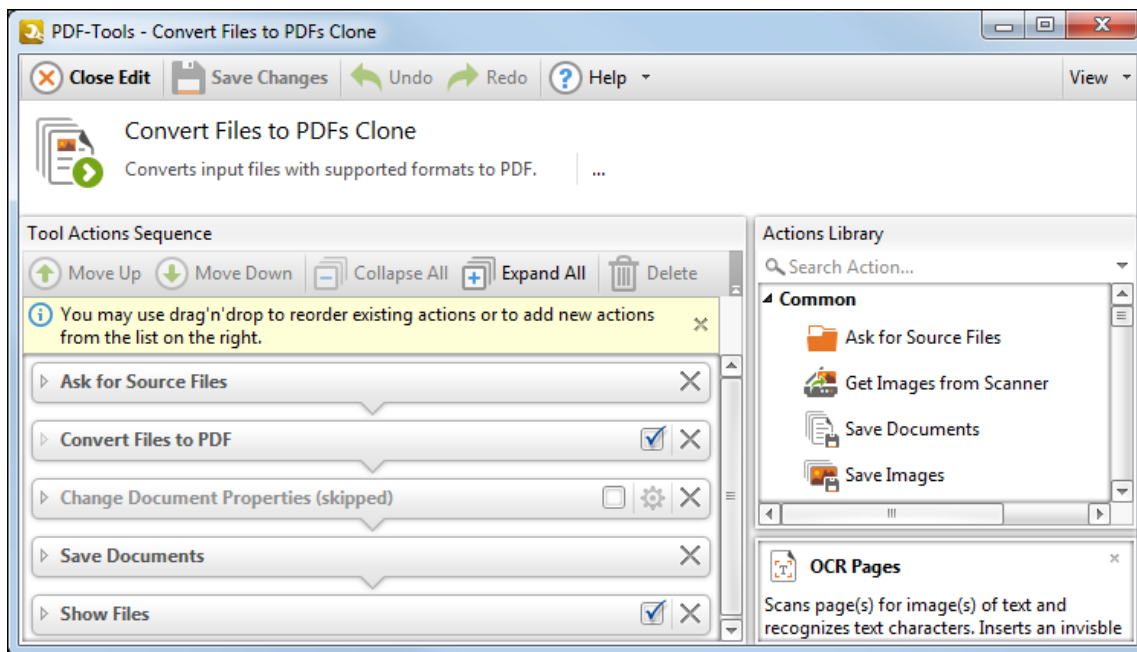
Figure 3. Cloned Tools Edit Tools Window. Convert Files to PDFs Clone

- See **here** 37 for an explanation of the sections within the Edit Tools Window.
- The actions that the tool performs are listed in the Tool Actions Sequence. (Unlike the Tool Actions Sequence in Standard Tools, these actions can be removed. Click the ✕ icon to remove actions).

- When actions are placed in the Tool Actions Sequence they can be expanded using the ▷ icon on the left of the action name. Further options can then be customized. See **Actions Library** ⌷55⌷ for an explanation of all options within actions.
- There is a check box next to some actions by default. A selected box means that the action is included in the Tool Actions Sequence when the tool runs. A cleared box means that the action is retained with the Tool Actions Sequence but will be skipped.
- Click the tool icon in the top left of the window to select a new icon for the cloned tool. It must be in *.ico, format.
- Click the name/description of the cloned tool to edit the name/description of the tool. The ellipsis icon can also be used to edit the description.
- Click the View menu to select options for displaying the Actions Library and Action Information.
- Double-click actions in the Actions Library to add them to the bottom of the Tool Actions Sequence. Alternatively, drag actions into the window to add them to the Tool Actions Sequence.
- Most actions have prerequisites and postrequisites in order to function correctly. I.e. certain other actions must be included before/after them or there will be a sequencing error and the tool will not run. If this is the case the ⚠ warning icon will appear. Click the icon for an explanation of what needs to be changed for the tool to run correctly. The warning message icon will also be displayed next to the tool name in the Custom Tools window if a tool is saved with sequencing errors. See here ⌷190⌷ for a comprehensive list of the prerequisites and postrequisites for each action.

Toolbars

The toolbar buttons in the Tool Actions Sequence for Cloned Tools are identical to those in the Edit Tools toolbar:

⬆ **Move Up** moves the selected action up one step.

⬇ **Move Down** moves the selected action down one step.

🗗 **Collapse All** collapses all expanded actions.

🗗 **Expand All** expands all expandable actions.

🗑 **Delete** removes the selected action from the list.

The main toolbar buttons for Cloned Tools are also identical to those in the Edit Tools toolbar:

✖ **Close Edit** ends the current edit.

💾 **Save Changes** saves any changes since the tool was last saved.

Undo reverses the most recent action.

Redo reverses the most recent undo.

Help opens the help menu for quick access to help, support and other useful pages.

3.2 Create Tool

Create Tool

One of the great features of **PDF-Tools** is the option to create tools. This allows users to create brand-new tools in order to meet highly-specific requirements. The Create Tool feature allows the user to add any of the thirty-six actions of the **Actions Library** 55 to an empty Tool Actions Sequence. The actions will be carried out in the order that they are sequenced when the tool runs, provided there are no sequencing errors - see **here** 190 for further information. Therefore it is possible to create tools that feature any combination of the available actions. Users can combine actions with regard to sourcing files, such as the **Ask for Source Files** and **Get Images from Scanner** options, with actions from the **Create PDF, Perform/Update PDF, Export PDF** and **Secure PDF** menus.

Creating Tools

1. Launch **PDF-Tools** to open the Standard Tools window:
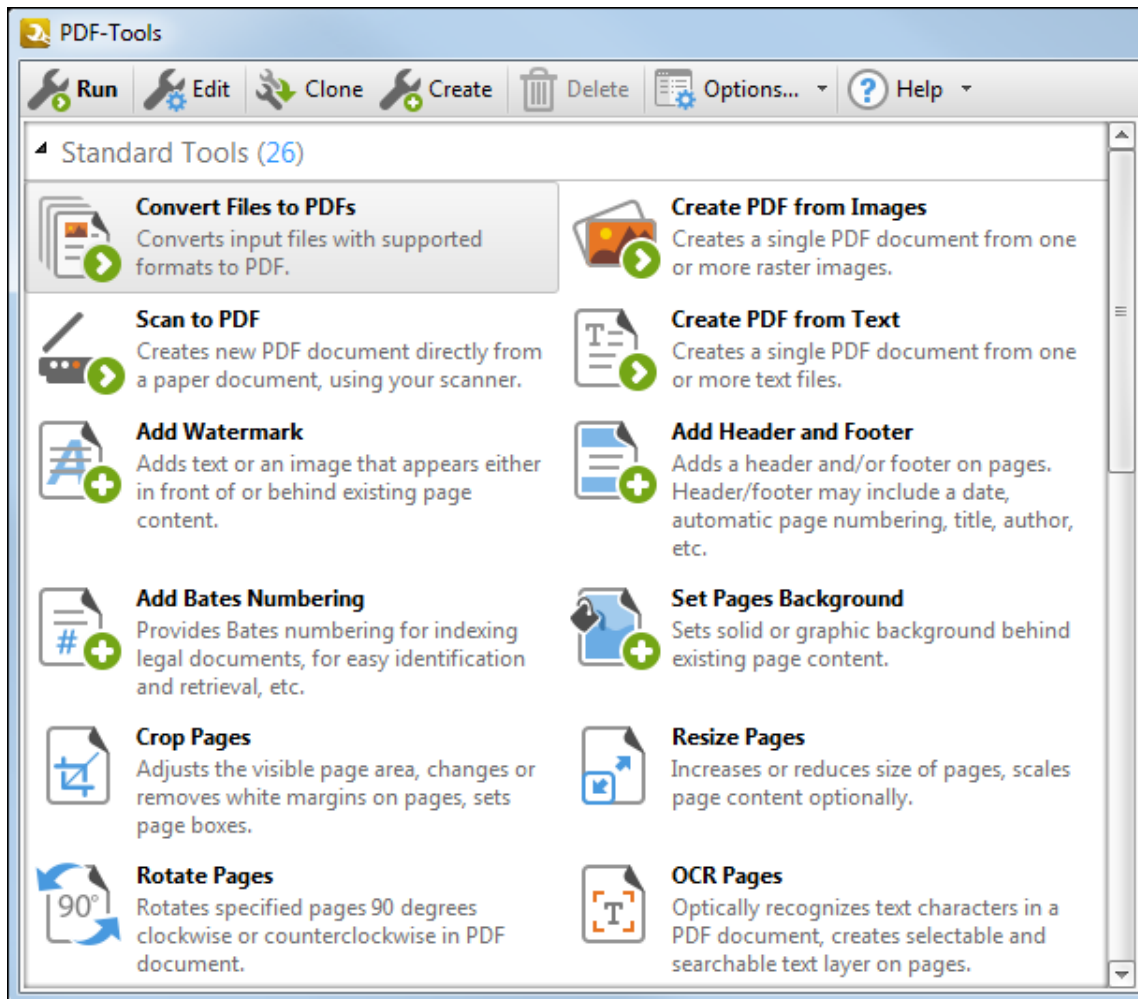
Figure 1. Standard Tools Window

2. Click ![icon] **Create** in the main toolbar to open The Edit Tools Window *(figure 2)*:
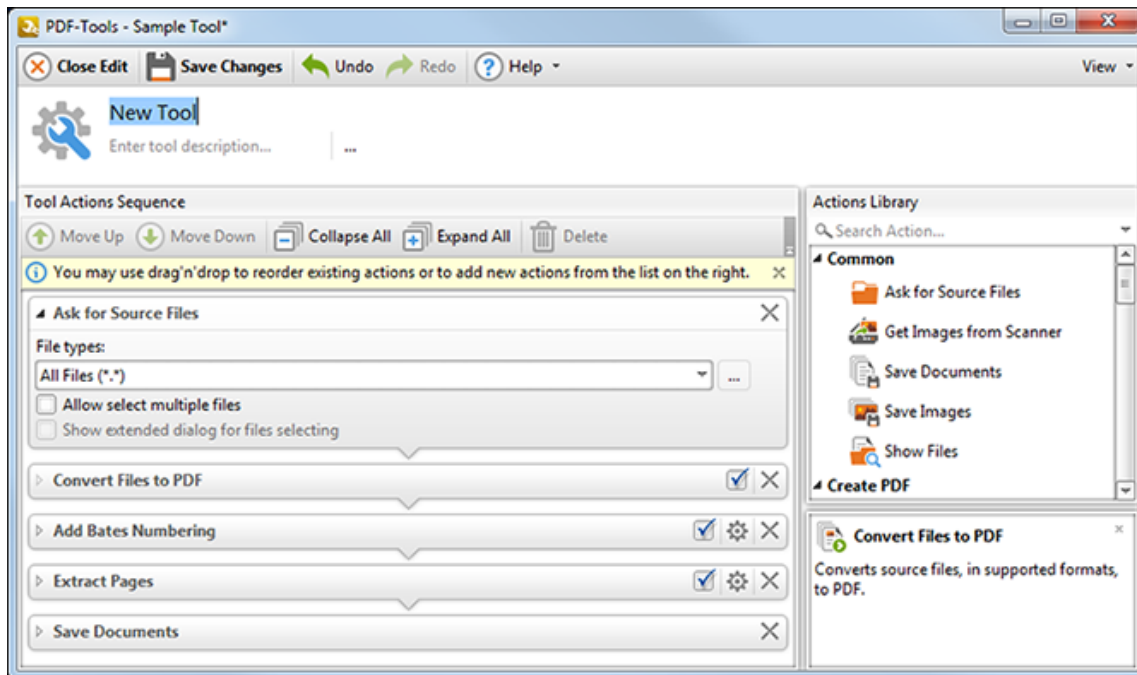
Figure 2. Edit Tools Window

3. Edit the name box as desired. Click **Enter tool description,** or click the ellipsis icon, to edit the tool description. Click the ⚙ icon to select an icon for the tool. (Please note that the icon must be in the **(*.ico)** format).

Building Tools

All tools are composed of actions from the Actions Library. These actions make up the Tools Action Sequence, which determines the actions that tools perform when they run, as well as the order of actions performed. Therefore is is necessary to add actions to the Tool Actions Sequence in order to build tools.

Actions Library

The Actions Library is located on the right of the Edit Tools window. It contains the thirty-six available actions:
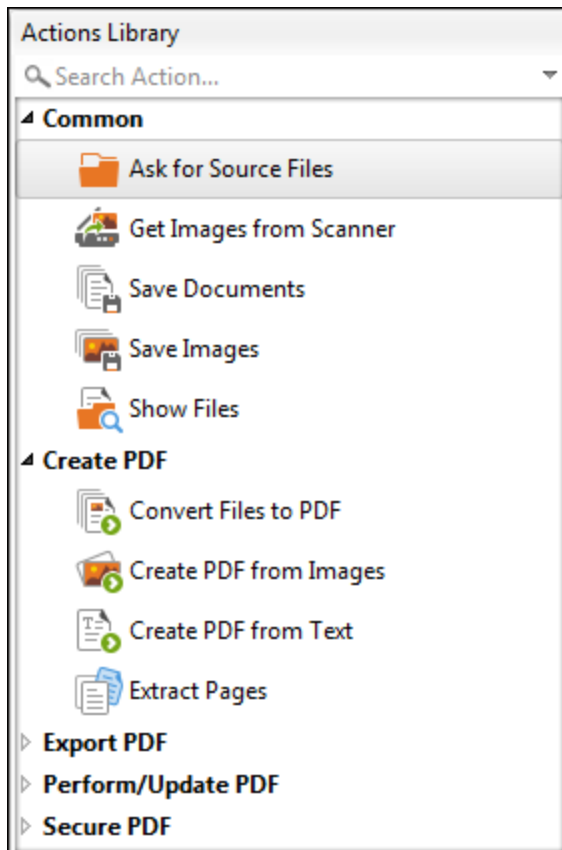
Figure 3. Actions Library

- Double-click actions to add them to the Tool Actions Sequence. Alternatively, select actions and drag them into the open window.
- When actions are placed in the Tool Actions Sequence they can be expanded using the ▷ icon on the left of the action name. Further options can then be customized. See **Actions Library** ⌐55⌐ for an explanation of all options within actions.
- Ensure that actions are ordered correctly. Almost all actions require other actions before/after them in the Tool Actions Sequence to run. A warning message icon ⚠ will display next to the action name if it is not correctly ordered. Click the icon for an explanation of what needs to be changed for the tool to run correctly. The warning message icon will also be displayed next to the tool name in the Custom Tools window if a tool is saved with sequencing errors. See here ⌐190⌐ for a comprehensive list of the prerequisites and postrequisites for each action.
- Click the ✕ icon to remove actions from the Tool Actions Sequence.
- There is a check box next to some of the actions by default. A selected box means that the action is included in the Tool Actions Sequence when the tool runs. When boxes are skipped, the action remains in the Tool Actions Sequence but its function is skipped.
- Click the View menu to select options for displaying the Actions Library and Action Information.

Toolbars

The Tool Actions Sequence buttons perform the following actions:

Move Up moves the selected action up one step.

Move Down moves the selected action down one step.

Collapse All collapses all expanded actions.

Expand All expands all expandable actions.

Delete removes the selected action from the list.

The Main Toolbar buttons perform the following actions:

Close Edit ends the current edit.

Save Changes saves any changes since the tool was last saved.

Undo reverses the most recent action.

Redo reverses the most recent undo.

Help opens the help menu for quick access to help, support and other useful pages.

3.3   Options

Options

The **Options** tab in the Main Toolbar allows the user to customize preferences and further settings within **PDF-Tools.** When it is selected, the following options are available:
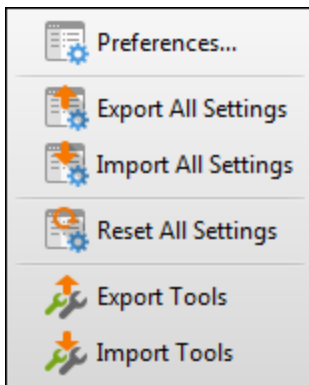
Figure 1. Options Menu

Click **Preferences** to launch the **Preferences** dialog box:
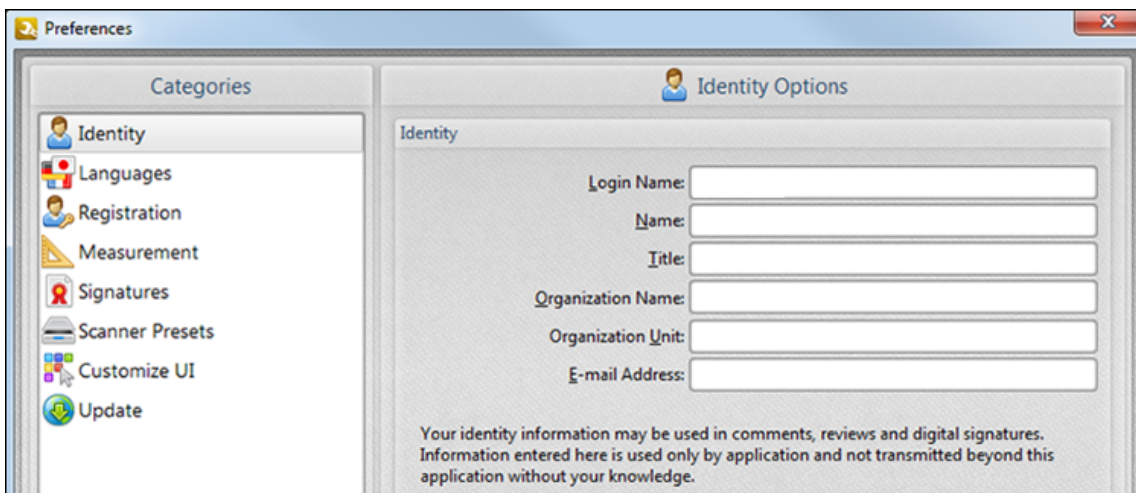
Figure 2. Preferences Dialog Box

The preferences relate to the identity, language, registration, measurement, digital signature, scanner preset and user interface options. The preferences dialog box is also used to check for updates. Click the options in the **Categories** menu to customize settings:

Identity

The identity options are detailed in *(figure 1).* As indicated, this information will be used in comments, reviews and digital signatures (but will not be transmitted further unless user authorization is given). Enter information into the relevant text boxes in order to save time when working on projects. For example, when using the **Add Digital Signature** [132] action, the information entered into the **Identity Options** text boxes will be transferred automatically into the relevant sections of the digital signature.

Languages

The language options allow the user to customize the language of the user interface. Languages are listed in two columns. The column on the left details available languages according to their name in English. The column on the right details available languages in their native language. **English (US)** is the default language. The **Use Regional Settings** option, where possible, selects the regional language of the user. When the desired language is selected, click **Apply** to change the language of the user interface. Additionally, click **Set as Default** to designate the language selected as the default language. Click **OK** to save changes and close the window. Click **Cancel** to revert to previous settings and close the window.

Registration

The registration options are used to add or remove serial keys. Click **Add new Serial Key** to add new serial keys. The **Add New Serial/License Key** dialog box will open. Click **Paste Key from Clipboard,** if the key has been copied to the clipboard, or enter the details into the text box manually. Click **Continue** to register or **Cancel** to cancel the process and close the dialog box. When a serial key is selected, click **Remove** to remove it from the list of installed serial keys.

Measurement

This option is used to determine the units of measurement throughout **PDF-Tools.** Click the menu to select the unit of measurement desired. The options are **millimeter, point, inch, centimeter and pica. Millimeter** is the default setting.

Signatures

The signature options determine the creation, appearance and verification settings for signatures within **PDF-Tools.** Click **Signatures** in the **Categories** menu to open **Digital Signatures Options. Creation & Appearance** options determine the options for signature creation and signature appearance within documents. Click **More** for further options. Use the **Creation and Appearance Preferences** dialog box to customize further settings.

Scanner Presets

These settings determine the scanner presets for tools that utilize a scanner within **PDF-Tools.** Click to select a preset mode. There are five preset modes that are optimized for use with specific types of documentation. These are detailed in the **Scanner Settings** menu. Alternatively, users can enter custom settings in the **Parameters** text boxes. See **here** 193 for an explanation of these settings.

Customize UI

The user interface can be customized to the user's taste using these settings. Use the boxes to select the fonts used for menus, toolbars, dialogs and views. Use the **Colors** boxes to select the colors of the **Face, Selection, Highlight, Text** and **Windows** within the user interface. Use the **Backgrounds** boxes to select the **Type, Style** and **Pattern** of the user interface background. Select the **Show Overlay Shadows** and **Turn off all textured backgrounds to improve UI performance on terminal session** boxes as desired. Click the **Reset to Defaults** button to return all user interface settings to their default values.

Update

The **Update** option is used to check for updates to **PDF-Tools.** It is recommended that users check for updates regularly as we are continually updating and improving our software. Click the **Check for Updates Now** button to check for updates. Software will then update automatically if an update is available.

Click **Apply** to implement changes made in the **Preferences** dialog box. Click **OK** to implement changes and close the dialog box. Click **Cancel** to revert to previous settings and close the window.

Export All Settings

This option is used to export the current settings of **PDF-Tools** to another copy of the software. When it is selected, the **Save Export File** dialog box will open, which can be used to save the current settings. They will be saved as a **.pdts** file. Use the **Import All Settings** option detailed below to import the saved settings.

Import All Settings

This option is used to import settings into **PDF-Tools.** When it is selected, the **Open Import File** dialog box will open. Select the settings to be imported an click **Open.** The settings will then import.

Reset All Settings

This option is used to reset all settings in **PDF-Tools.** When it is selected a warning dialog will appear. Click **Yes** to activate this feature and restore all settings to their default values. Click **No** to close the dialog box and cancel the process.

Export Tools

This option is used to export tools from **PDF-Tools.** When it is selected the **Choose Tools for Export** dialog box will open. Select the boxes of the tools to be exported. Click **OK** to export the tools or **Cancel** to cancel the process and close the dialog box. Exported tool and their associated settings will be saved as a .**pdtex** file.

Import Tools

This option is used to import tools into **PDF-Tools.** When it is selected the **Choose Import File** dialog box will open. Select the tools to be imported and click **Open**. A dialog box will open prompting the user to confirm the tools for import. Click **OK** to import the tools and their associated settings. Click **Cancel** to cancel the process and close the dialog box.

4 Actions Library

Actions Library

This chapter provides detailed information on the thirty-six available actions within the Actions Library. The actions are the components of tools. The sequence in which they are ordered in the Tool Actions Sequence determines the order that they are carried out when tools run. They each feature further customizable settings to fine-tune the functions that they perform. The Actions Library is displayed in the Edit Tools window as a convenient way for users to select actions to add to the Tool Actions Sequence. Brief descriptions of the functions that actions perform are displayed in the info pane beneath the Actions Library when actions are selected.

The actions are grouped into five categories:

- **Common** 56 - actions that are used the most often.
- **Create PDF** 70 - actions that relate to the creation of PDF files.
- **Perform/Update PDF** 95 - actions that relate to performing procedures on/updating PDF files.
- **Export PDF** 84 - actions that relate to exporting PDF files into various formats.
- **Secure PDF** 131 - actions that relate to the security of PDF files.

4.1 Common Actions

Common Actions

The **Common Actions** are the most frequently used actions. They determine the locations at which files are located, saved and displayed. There are five actions in this category:

Ask for Source Files 57 prompts the user to select files that will be edited/converted with tools.

Get Images from Scanner 60 sources input material from a local scanner.

Save Documents 64 determines how documents are saved.

Save Images 66 determines how images are saved.

Show Files 69 displays the location of new files to the user at the end of the process in question.

It is necessary to have either the **Ask for Source Files** 57 action or the **Get Images from Scanner** 60 action in the Tool Actions Sequence or tools will not run (as they will not be able to source files) and a warning icon will be displayed.

Similarly, either **Save Documents** 64 or **Save Images** 66 must be included in the Tool Actions Sequence or tools will not run as files will not be saved. A comprehensive list of how all actions need to be ordered in the Tool Actions Sequence is available **here.** 190

The **Show Files** 69 action is optional. It provides a convenient way to view the location of converted files.

Ask for Source Files

Ask for Source Files

Files must first be selected/created before they can be edited in **PDF-Tools.** There are two actions in the Actions Library that achieve this:

Ask for Source Files, which prompts the user to select files.

Get Images from Scanner, ⁶⁰ which creates files from the local scanner.

When the **Ask for Source Files** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
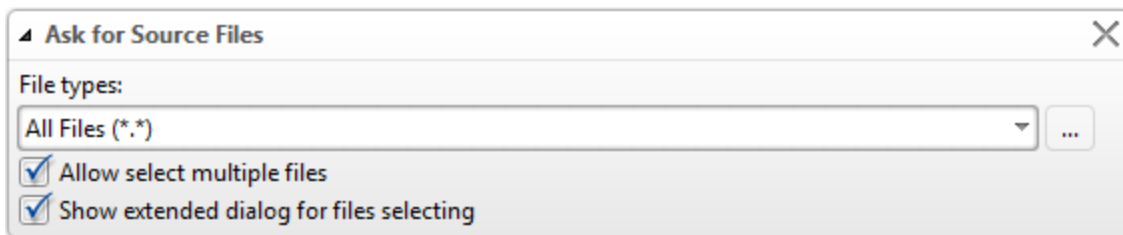
Figure 1. Ask for Source Files Options

- **File types** determines which file formats are permitted. The default setting is **PDF Documents (*.pdf)** as this is the most commonly used format. The alternate main setting is **All Files (*.*)**, which means all file types are displayed. Click the ellipsis icon ... for a comprehensive list of all available formats. These are explained **here.** ¹⁷³
- The **Allow select multiple files** box is selected by default. Clear this box to convert one file at a time.
- **Show extended dialog for files selecting** is available only when the **Allow select multiple files** box is selected. This option launches a dialog box *(figure 2)* when the user is prompted to select files and is especially useful if more than one file is being converted. If this box is not selected then the **Choose Input Files** step below will be omitted.
- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Choose Input Files

The Choose Input Files dialog box is displayed below:
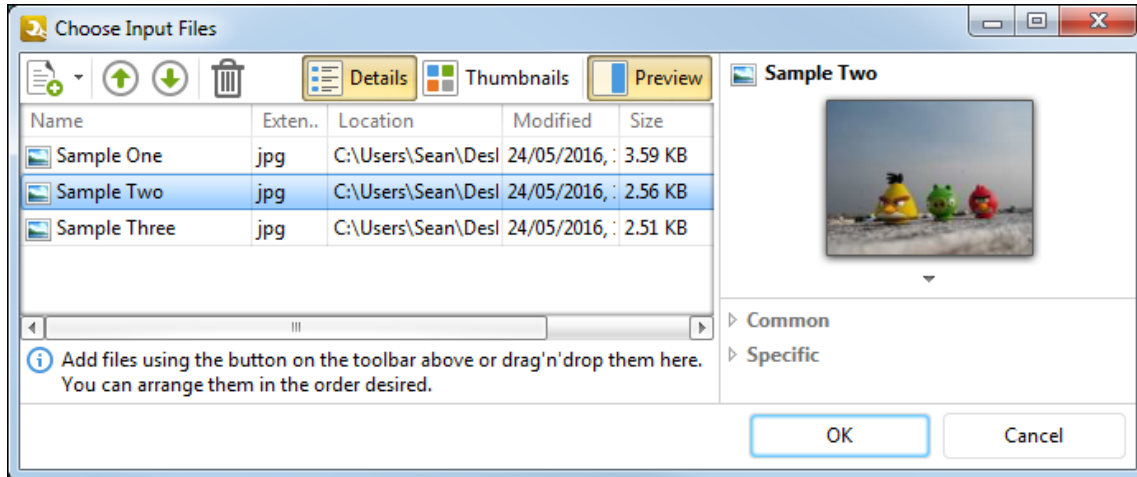
Figure 2. Choose Input Files Window

Select the files to convert from the files on your computer, or drag them into the dialog box. Click the toolbar buttons to carry out the following actions:

Add Files opens a dialog box to select files from the local computer. Alternatively, click the arrow to select entire folders or upload images from a scanner. See **here** 193 for information on scanner settings.

Move Up moves the selected file up in the sequence.

Move Down moves the selected file down in the sequence.

Delete removes the file currently selected in the **Choose Input Files** window.

Details and **Thumbnails** toggle between the display options for files. **Details** shows the file details such as name, extension and location. **Thumbnails** show a reduced-size image of files.

Preview displays a converted preview of the selected file, where possible, in the preview window on the right of the dialog box. Beneath the preview window there are expandable options for viewing common/specific details about the file shown in the preview window.

When the files have been selected click **OK** to proceed to the next step *(figure 3).* Click **Cancel** to cancel the process.

Open Files

If the **Show extended dialog for files selecting** box is not selected then the Choose Input Files step above will be skipped. The user will be prompted to select files through the dialog box displayed below:
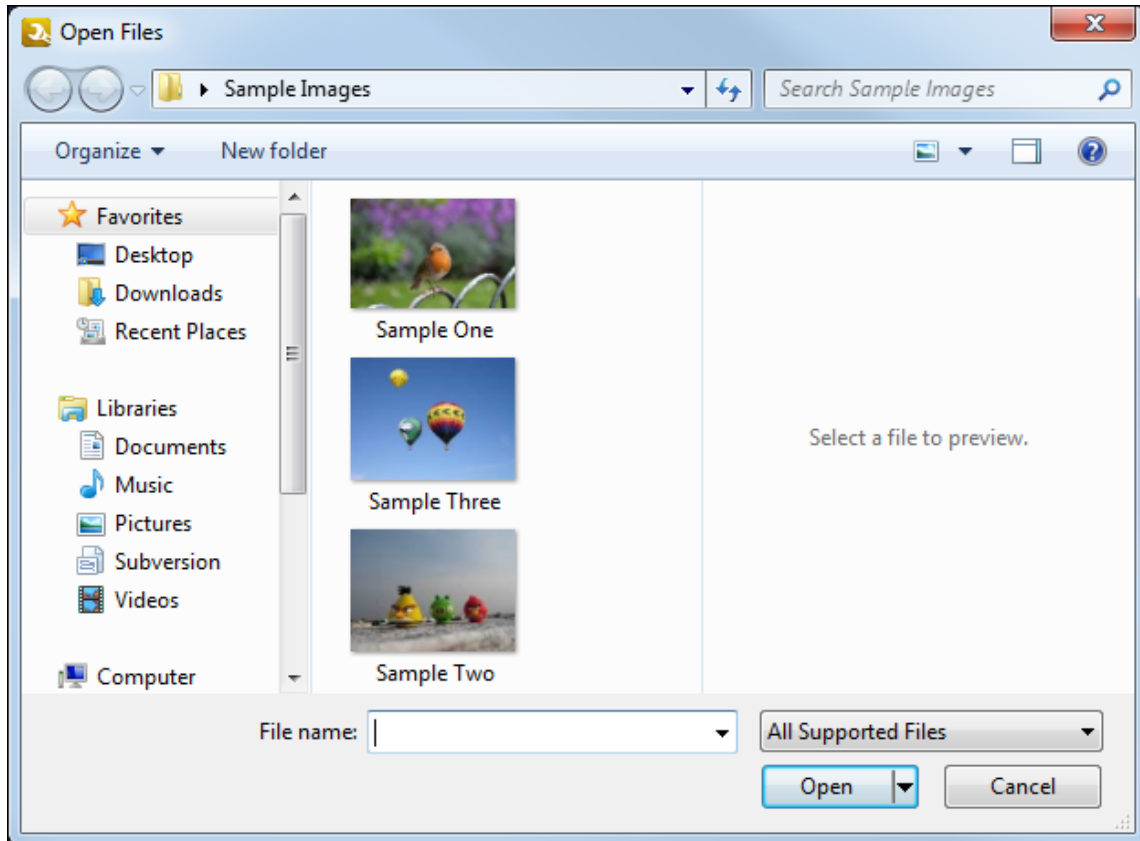
Figure 3. Open Files Dialog Box

Select files and click **Open** to launch the tool. Click **Cancel** to cancel the process and close the **Open Files** dialog box.

Get Images from Scanner

![Get Images from Scanner icon] **Get Images from Scanner**

This is the alternate option that tools use to select files (as opposed to **Ask for Source Files** 57). When this action is used the tool sources images from a local scanner. When the **Get Images from Scanner** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
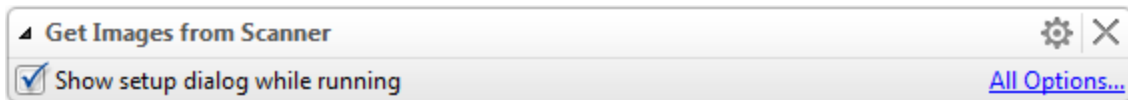

Figure 1. Get Images from Scanner Options

- Select the **Show setup dialog while running** box to launch the **Scan Properties** dialog box when the tool runs.
- Click **All Options** or the gear icon ⚙ to select **Scan Properties.** These are explained below:

Scan Properties
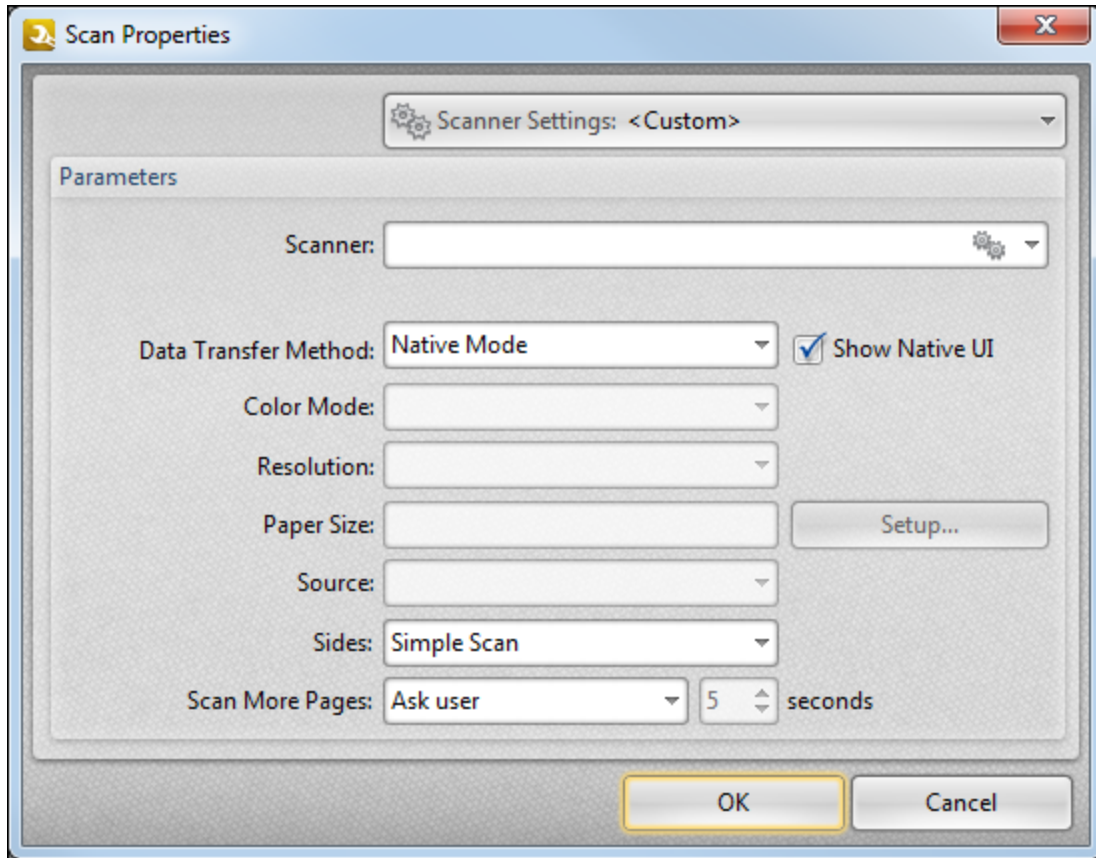
Figure 2. Scan Properties Dialog Box

- Click the **Scanner Settings** menu to open the menu shown in *(figure 3)* below.
- Click the **Scanner** menu to select the scanner that the tool will use.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode.**
- **Color Mode** has three options: **Color, Grayscale** and **Black & White**. These refer to the format of the scanned documents.
- Click the **Resolution** menu to select the **dpi** (dots per inch) of scanned documents.
- **Paper Size** refers to the size of the paper used when scanning. Click **Setup** for further options, which are explained **here.** 193
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner being used.
- Click the **Sides** menu to select which sides of documents are scanned. There are three options: **Simple Scan, Manual Duplex** and **Manual Duplex Reversed.** Click the arrow for an explanation of these options.
- Click the **Scan More Pages** menu to select the setting for when further pages are scanned.
- The **Show Native UI** box is selected by default. This means the scanner selects certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the box to customize these parameters manually.

Click **OK** to save changes and return to the Edit Tools window. Click **Cancel** to revert to previous settings.

Then, in the Edit Tools window:

- Click ⊡ **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Scanner Settings

Click the **Scanner Settings** menu to save custom settings for later use. This opens *(figure 3)* below.
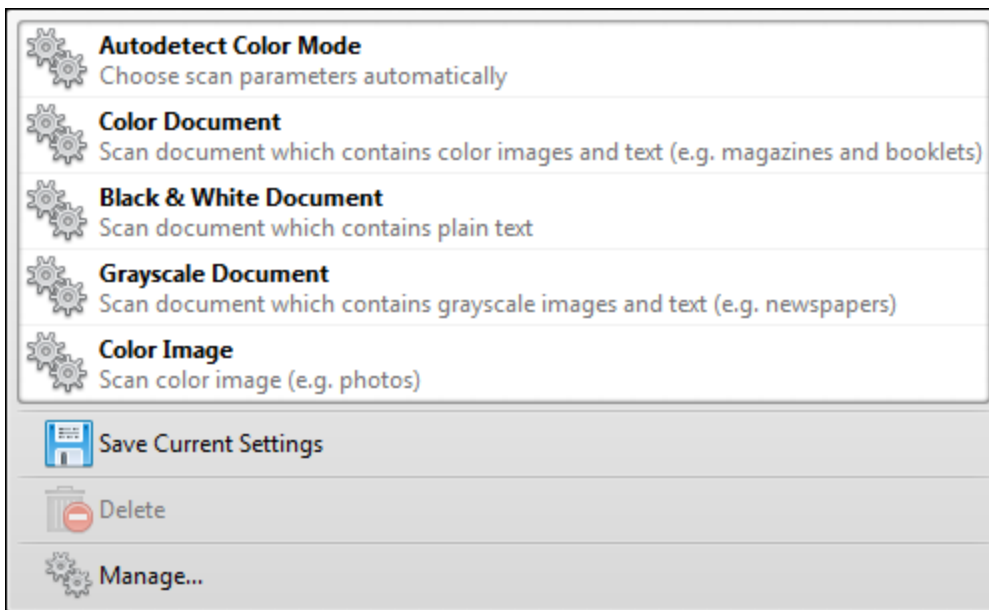
Figure 3. Scanner Settings Menu Options

This menu is used to adjust the scanner mode or save custom settings. There are five preset modes that relate to the format of scanned documents:

- **Autodetect Color Mode**
- **Color Document**
- **Black & White Document**
- **Grayscale Document**
- **Color Image**

Details of when these should be used are provided in *(figure 3).* They feature settings that are optimal for their respective modes.

- Click **Save Current Settings** to name (and give a brief description, if desired, to) customized settings.
- Click **Delete** to delete the custom preset mode currently selected.
- Click **Manage** to manage custom preset modes. The five preset modes cannot be changed but they can be cloned and then edited.

Save Documents

![Save Documents icon] **Save Documents**

The **Save Documents** action is used to save documents created/edited using **PDF-Tools.** It is used in all of the **Standard Tools**⌐141⌐ except for **Extract Images from PDF**⌐111⌐ and **Export PDF to Images**⌐156⌐, which use the **Save Images**⌐66⌐ option instead.

When the **Save Documents** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Save Documents Options

- **File Location** determines where files are saved. There are three options: **Always ask for file location**, which means the tool will ask the user where on their computed files should be saved. **Use source folder as destination** means that the folder from which the original files came will also be the folder in which the new files are saved. **Use custom folder specified** allows the user to specify a folder in the text box below.
- **File Name** determines the name of new files, including any **macros.**⌐188⌐
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. There are four options: **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.

- Click ![save icon] **Save Changes** to save new settings.

- Click **Close Edit** to end the current edit and revert to previous settings.

Save Images

🖼️💾 Save Images

The **Save Images** action is used to save images created using tools. It is used in two of the **Standard Tools:** [141]

- **Extract Images from PDF** [111] and
- **Export PDF to Images** [85]

When the **Save Images** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
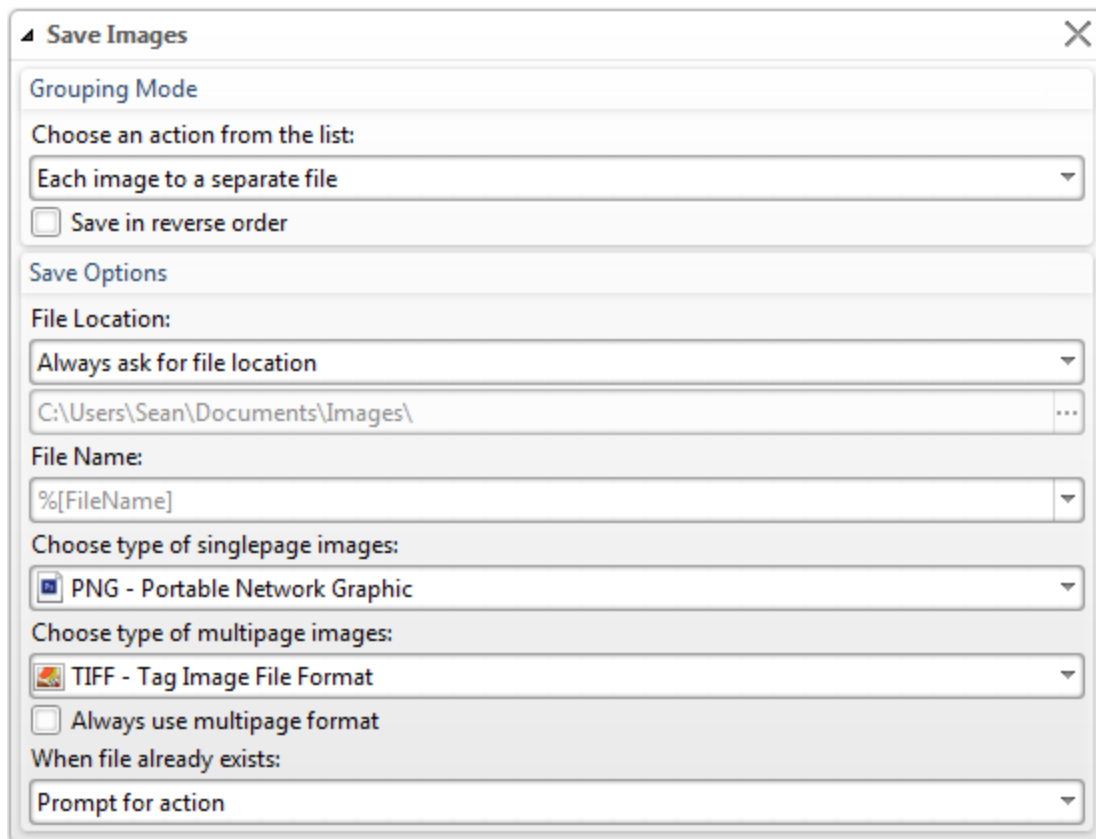

Figure 1. Save Images Further Options

- **Grouping Mode** determines how files are grouped. See *(figure 2).*
- **Save Options** determines the name of new files. See *(figure 3).*

- **Choose Type of Singlepage Images** determines the format when saving single-page images.
- **Choose Type of Multipage Images** determines the format when saving multi-page images.
- Select the **Always use multipage format** box to use the multipage format every time.
- **When File Already Exists** determines the action that tools take when the file name entered in the **File Name** box is already in use. There are four options. **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.

Grouping Mode

There are four options regarding how created images are grouped:
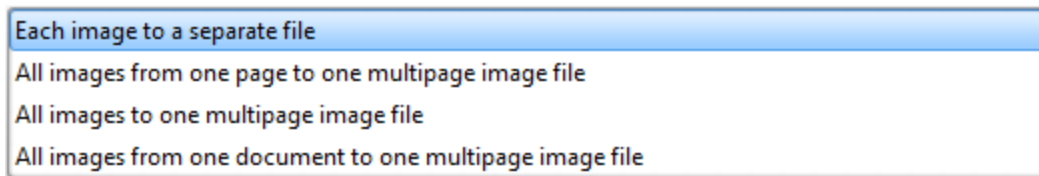
Figure 2. Grouping Mode Options

- **Each Image to a Separate File** saves each image to a separate file.
- **All Images from one Page to one Multipage image file** saves all images from a single page of a PDF document to one multi-page image file.
- **All Images to one Multipage Image File** saves all images from multiple pages of PDF documents into a single image file.
- **All Images from one Document to one Multipage Image File** saves all images from a single PDF document to one multi-page image file.
- Select the **Save in Reverse Order** box to save images in an order reverse to that in which they were converted.

Save Options

There are five options with saving files:
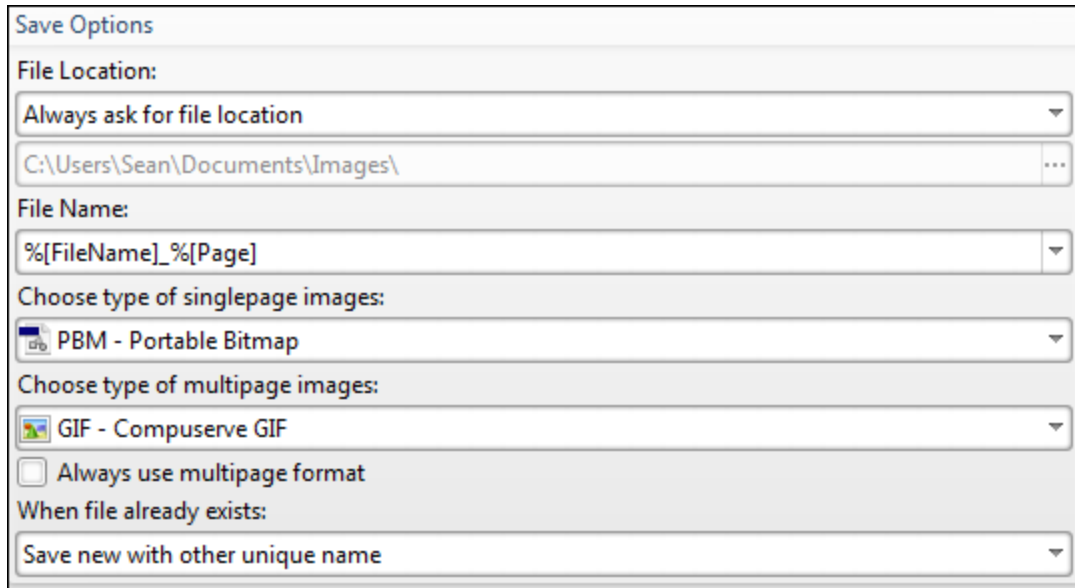
Figure 3. Save Options

- **File Location** determines where files are saved. There are three options: **Always ask for file location**, which means the tool will ask the user where on their computed files should be saved. **Use source folder as destination** means that the folder from which the original files came will also be the folder in which the new files are saved. **Use custom folder specified** allows the user to specify a folder in the text box below.
- **File Name** determines the name of new files, including any **macros.** [188]
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. See *(figure 2)*.
- **Choose type of singlepage image** determines the format of singlepage images created with the tool.
- **Choose type of multipage image** determines the format of multipage images created with the tool.
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. There are four options: **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.

- Click 💾 **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Show Files

Show Files

The **Show Files** action is used to display converted files within their folder when the conversion process is complete. When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
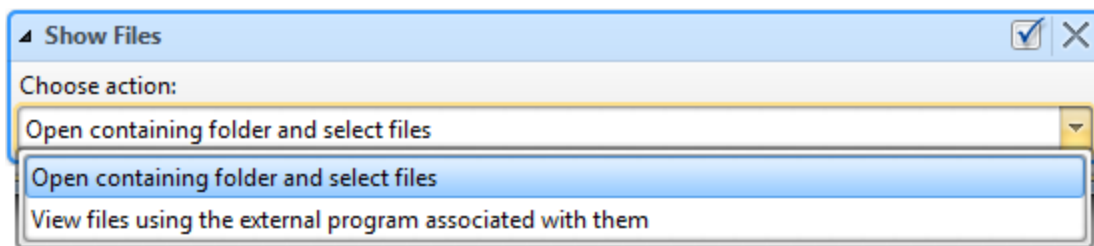
Figure 1. Show Files Options

- **Open containing folder and select files** opens the folder that contains the new file and selects it in the window.
- **View files using the external program associated with them** opens the file using the program associated with the type of files that have been converted. For example, if **PDF-XChange Editor** is the default program for viewing PDF files, then the tool will open that program and use it to display the new file.

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

4.2   Create PDF

Create PDF

The **Create PDF** actions are used to create PDF files. There are four actions in this category. Three of them relate to the conversion/creation of PDF files from specific formats - standard files (see **here** [173] for a list of compatible formats) image files and text files. The fourth option, **Extract Pages,** relates to the creation of a new PDF document using specified pages from a different document.

Convert Files to PDF [71] converts source files into PDF format.

Create PDF from Images [72] creates PDF files using raster image files.

Create PDF from Text [79] creates PDF files from text files.

Extract Pages [82] extracts specified pages to a new document.

Convert Files to PDF

Convert Files to PDF

The **Convert Files to PDF** action is used to convert source files into PDF format. It is intended for use with files that contain both text and images. A complete list of supported file formats is available **here.** [173] Use the **Create PDF from Text** [79] or **Create PDF from Images** [72] action to create PDF documents from purely text/image files.

The **Convert Files to PDF** action creates a new PDF file from each input file. Use the **Split/Merge Documents** [129] action to create a single PDF document from multiple input files.

Please note that the Convert Files to PDF action must be ordered after the Ask for Source Files [57] **action in the Tools Action Sequence or and the tool will not run. A comprehensive list detailing prerequisites and postrequisites for all actions is available** here. [190]

Create PDF from Images

Create PDF from Images

The **Create PDF from Images** action is used to create a single PDF file from raster images. When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Create PDF from Images Options

- **Show setup dialog while running** is explained **here.** [197]
- Click **All Options** or the gear icon ⚙ to select further options. These are displayed in *(figure 2)* below.
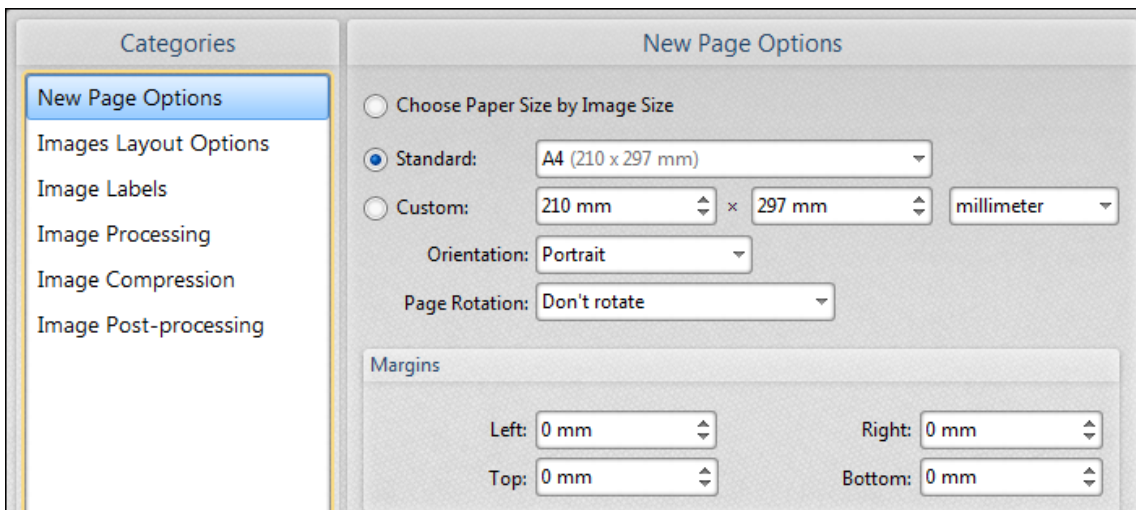
Figure 2. Images to PDF Further Options

- **New Page Options** determines the page design of new PDFs. See *(figure 3).*
- **Images Layout Options** determines the layout of new PDFs. See *(figure 4).*
- **Image Labels** determines the label of new PDFs, if desired. See *(figure 5).*
- **Image Processing** determines the downsampling, conversion and pixel density of new PDFs. See *(figure 6).*
- **Image Compression** determines the variables for compressing new PDFs. See **(figure 7).**

- **Image Post-processing** determines the variables for deskewing and despeckling new PDFs. See **(figure 8).**

New Page Options

Options for new pages are displayed in the following window:
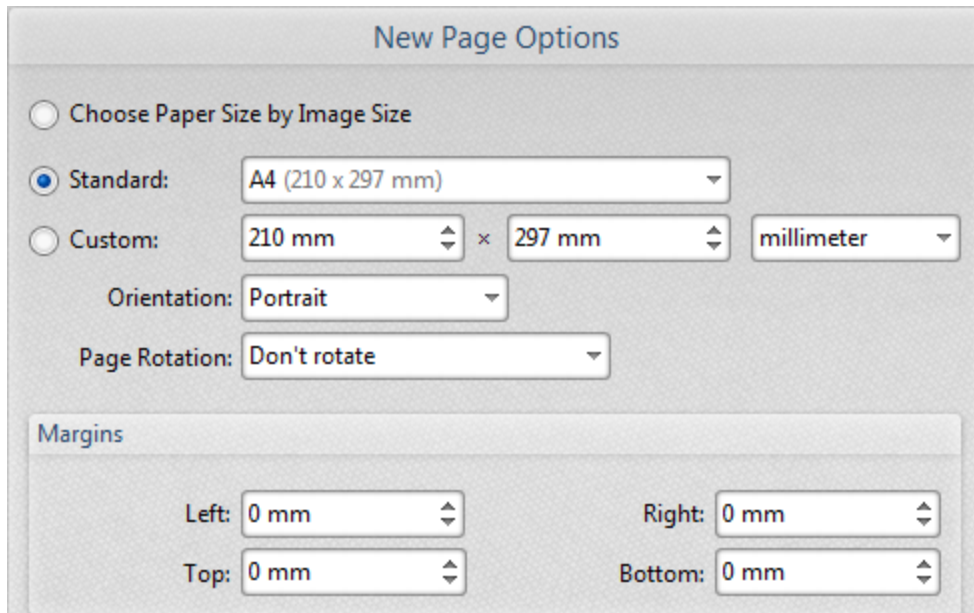
Figure 3. New Page Options

- The **Choose Paper Size by Image Size** option crops new PDFs according to the image size converted. I.e. the borders of the original image define the borders of the new PDF.
- The **Standard** option centers the original file in a new PDF of standard size. 'Standard' refers to common sizes such as those used by the **ISO** and **ANSI**. Click the menu for a complete list.
- The **Custom** option allows the user to enter custom dimensions. There is also a choice for portrait or landscape style (unless the **Choose Paper Size by Image Size** option is selected).
- The **Page Rotation** option rotates images as required during conversion. Click the menu for rotation options.
- The **Margins** option facilitates the customization of the image margins. Enter the values desired into the boxes. The new PDF will feature these dimensions.

Images Layout Options

These settings are intended for use when converting more than one image at a time. They allow the user to customize the layout of images. The options are displayed in **_(figure 4)_** below:

Figure 4. Images Layout Options

- The **Layout Rules** options determine the layout of images within new PDFs. Enter the desired amounts into the **Columns** and **Rows** boxes. Use the **Space between Columns** and **Space between Rows** boxes to determine how much empty space exists between columns and rows of images.
- **Align Images** determines the alignment of images within new PDFs. There are two options: **Reduce to Cell** and **Fit to Cell**. **Reduce to Cell** is the default setting. This reduces the size of the images to fit the size of the PDF. If the original images are smaller than the PDF size then they will remain at their original size. The **Fit to Cell** setting fits the images to the size of the PDF. If they are smaller than the PDF then they will be increased in size to match the size of the new document.
- The **Keep Aspect Ratio** box is selected by default. This means that images keep their original proportions and fit the specified PDF dimensions as far as possible within those proportions. Clear this box to disable the aspect ratio. Images will then match the PDF size exactly but may distort as a result (depending on the dimensions of the PDF document in relation to the dimensions of the original images).
- **Horizontal and Vertical Alignment** determines the location at which images in the new document appear.

Image Labels

This option adds labels to converted images. The options are displayed in **_(figure 5)_** below.
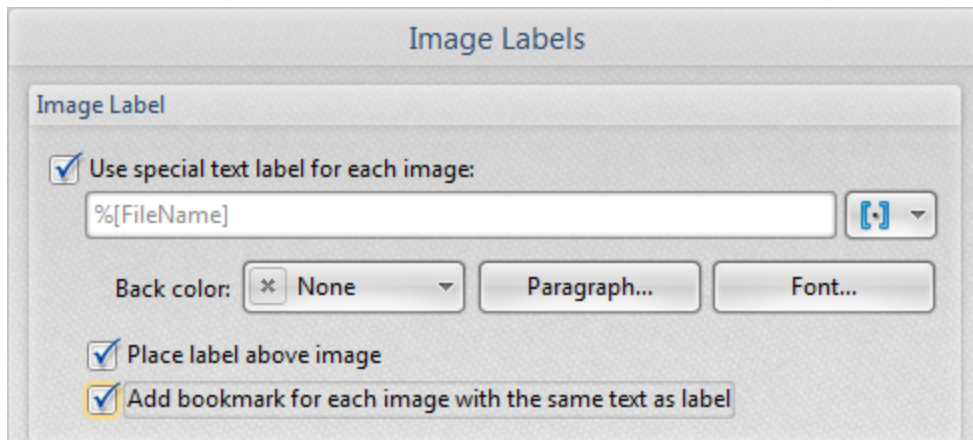
Figure 5. Image Labels Options

* Select the **Use special text label for each image** box to enable further options.
* Enter the label text into the **%[File Name]** box. Use the menu to add **macros.** [188]
* **Back Color** determines the background color of the label. Click the box to open a menu of available colors.
* The **Paragraph** settings determine the alignment, indentation and spacing of the text on the label. Click **Paragraph** to adjust these settings. The indentation settings include two special options. Select the **First Line** option to indent only the first line, as in a standard paragraph. The second special option is for the indentation to be hanging, which means that the first line is not indented but all subsequent lines are. Select **Hanging** for this option. When either of these settings are being used the **'By'** box must be adjusted accordingly.
* The **Font** settings allow the user to select the font used for the label. Click **Font** to select the font.
* If the **Place label above image** box is not selected then the label will appear below the image.
* The **Add bookmark for each image with the same text as label** option does exactly what it says. (Bookmarks are PDF document navigational tools that allow the reader to locate and link to points of interest within a document). Select this box to add bookmarks to the labels.

Image Processing

The options for **Image Processing** are displayed below:
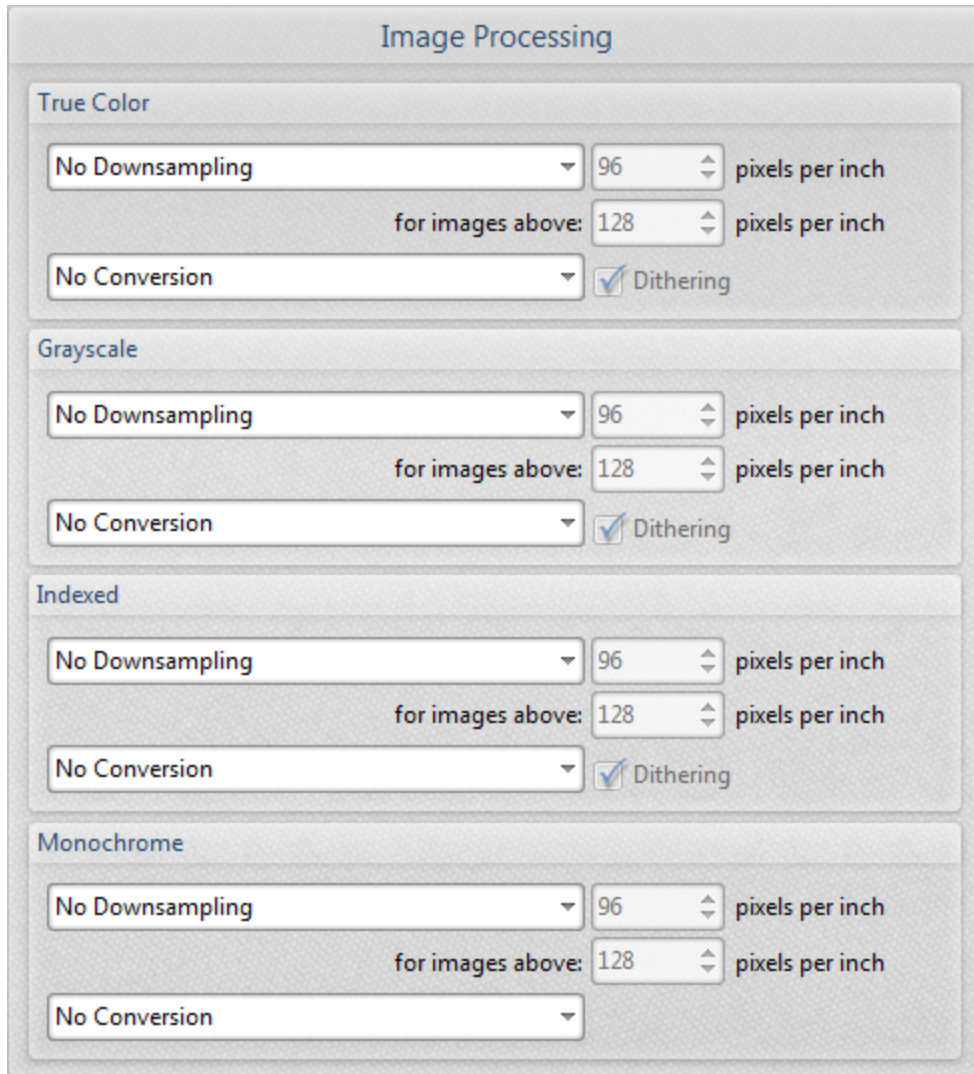
Figure 6. Image Processing Options

These settings determine the dimensions for converted documents of different formats: **True Color, Grayscale, Indexed** and **Monochrome.** There are two options for each format:

- **Downsampling** reduces the sampling rate of images. Each format has three options: **Linear, Bilinear and Bicubic.** Further information about these options is available **here.** Use the **pixels per inch** boxes to set the size above which images will be downsampled and the size to which they will downsampled.
- **Conversion** relates to the automatic conversion of files, where possible, from one format to another. Use this option to convert the format of new files when they are created. Where applicable, check the box for **dithering** as desired.

Image Compression

The options for image compression are displayed in (*figure 7*) below:
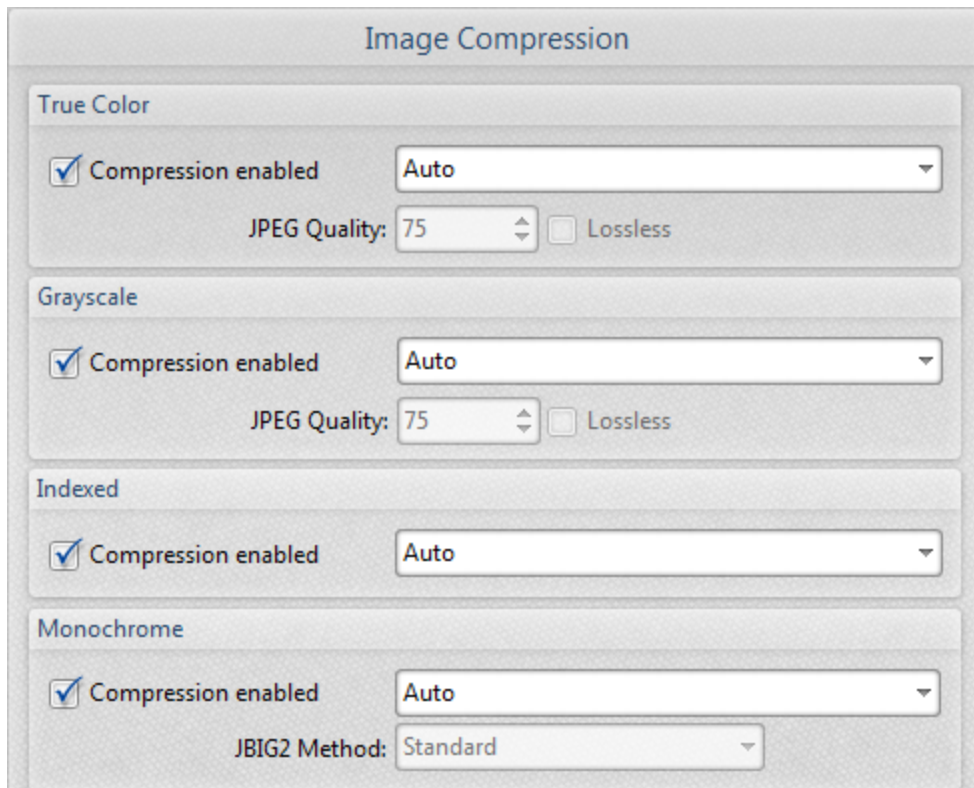
Figure 7. Image Compression Options

- Image compression is enabled by default. Clear the box to disable compression.
- When compression is enabled, use the adjacent menu to select the type of compression that the tool will carry out. **Auto** is the default setting.
- Where applicable, adjust the **JPEG Quality/JBIG2 Method** and **Lossless** options as desired.

Image Post-Processing

There are two options in **Image Post-Processing:**
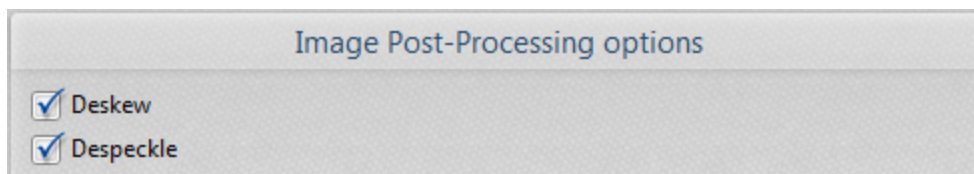
Figure 8. Image Post-Processing Options

- Select the **Deskew** box to deskew images. This straightens the edges of images automatically and is a useful tool if images have been scanned or photographed crookedly.

- Select the **Despeckle** box to despeckle images. This removes speckles from the image(s) during conversion.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Create PDF from Text

 Create PDF from Text

The **Create PDF from Text** action is used to create PDF files from text-based documents. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Create PDF from Text Options

- **Show setup dialog while running** is explained here. 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below.
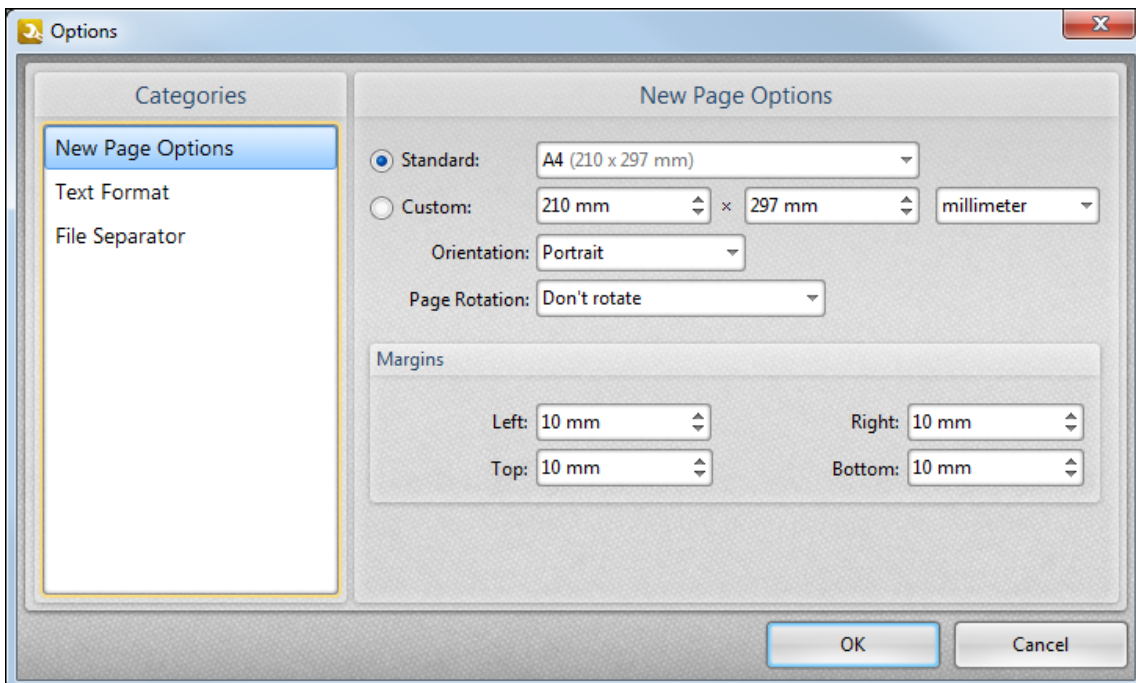
Figure 2. Create PDF from Text Further Options

- The **New Page Options** are identical to those of the **Create PDF from Images** action. See here 73 for an explanation of those options.

- The **Text Format** options determine the font, paragraph and layout options of the text. See **(figure 3)** below.
- The **File Separator** options relate to a special feature that separates files. See **(figure 4)** below.

Text Format

These settings determine the font, paragraph and layout of text during the conversion to PDF process. The options are displayed in **(figure 3)**:
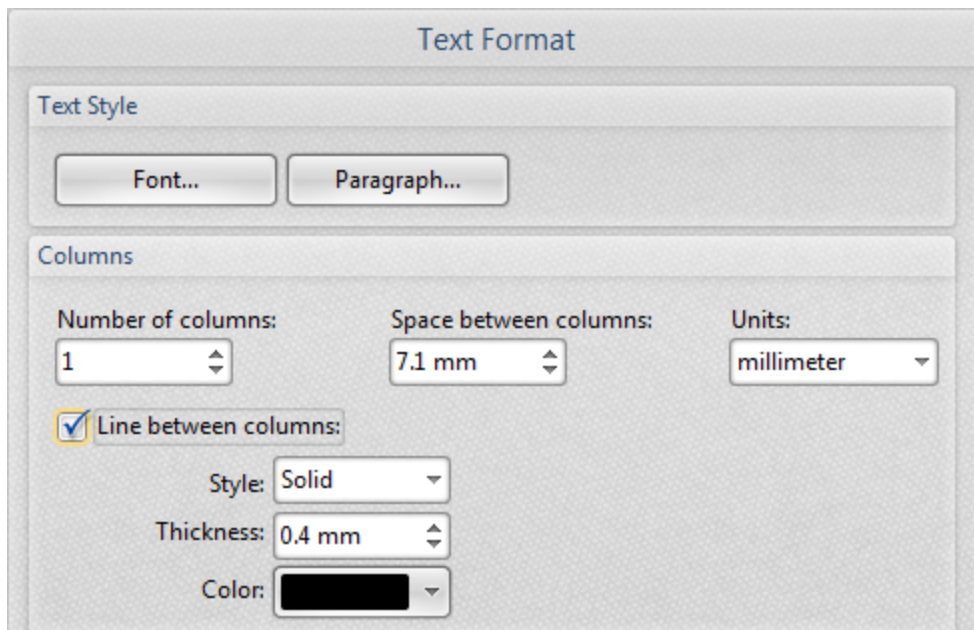
Figure 3. Text Format Options

- The **Font** and **Paragraph** buttons adjust the font and paragraph settings of the text.
- The **Columns** options set the number of columns of text, space(s) between columns and unit of measurement for the space(s).
- Select the **Line between columns** box to insert lines between the columns of text. The **Style, Thickness** and **Color** settings determine the parameters of the lines.

File Separator

The **File Separator** is a useful setting if more than one file is being converted into a single document. It inserts a label that shows a divide between two files. The options for the **File Separator** are detailed below:
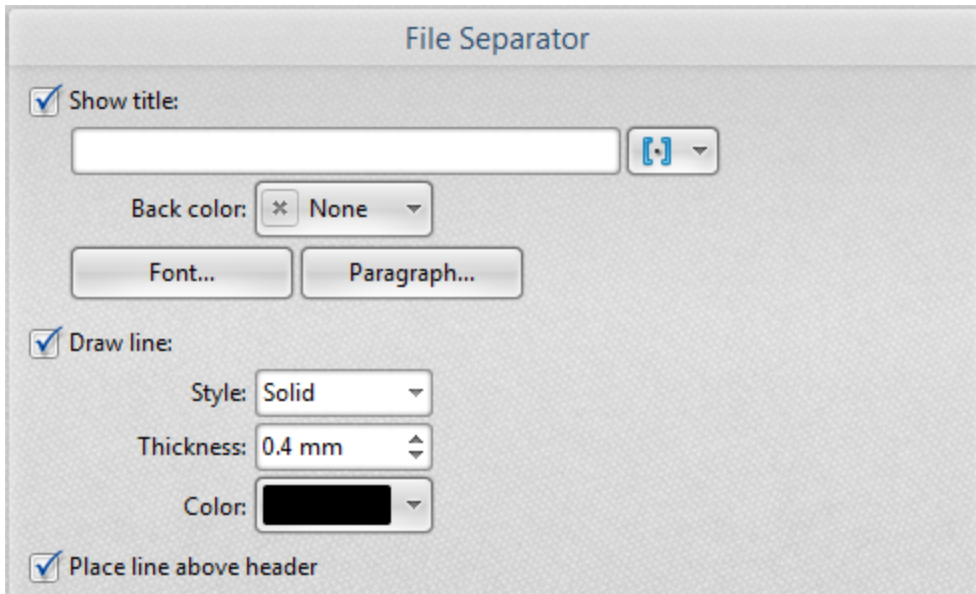
Figure 4. File Separator Options

- Select the **Show title** box to give the file separator a title. Include **macros** [188] as desired.
- The **Back color** option determines the color of the file separator.
- The **Font** and **Paragraph** settings determine the font style and paragraph layout of the file separator.
- Select the **Draw line** box to add a line to the file separator. Select the **Style, Thickness and Color** options as desired.
- Select the **Place line above header** box to position the line above the header of the document.

Click **OK** to save settings. Click **Cancel** to revert to the previous settings and close the window.

Then, in the Edit Tools window:

- Click 💾 **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Extract Pages

 Extract Pages

The **Extract Pages** action is used to extract specified pages within a PDF file to a new file during conversion. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Extract Pages Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
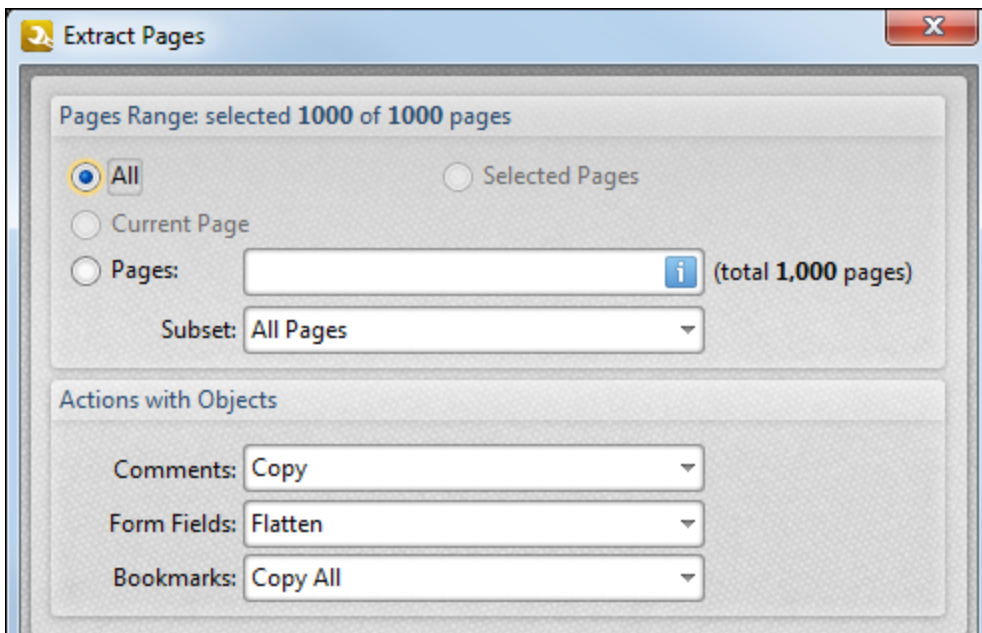
Figure 2. Extract Pages Further Options

- **Pages Range** determines which pages of the document will be extracted. **All** is selected by default.
- The **Current Page** and **Selected Pages** options are not available. These will be removed from the software in a future update.

- Use the **Pages** option to enter manually the numbers of pages to be extracted. Page numbers should be separated with a comma. Alternatively, page ranges can be entered, separated with a dash.
- Use the **Subset** option to select either all odd or all even pages of the document.
- The **Actions with Objects** settings determine what happens with the **Comments, Form Fields and Bookmarks** in the extracted pages.
- The options with **Comments** and **Form Fields** are to **Copy, Flatten (lock)** and **Not Copy.**
- The options with **Bookmarks** are to **Copy All, Do Not Copy** and **Copy Related.**

Click **OK** to save settings. Click **Cancel** to revert to the previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

4.3 Export PDF

![PDF icon]**Export PDF**

The **Export PDF** actions are used to export PDF files. There are four actions in this category. They relate to exporting PDF files in different formats:

Export PDF to Images [85] exports pages to different raster image formats.

Export PDF to Microsoft Powerpoint Presentation [88] exports pages to Microsoft Powerpoint Presentation files.

Export PDF to Microsoft Word Document [91] exports pages to Microsoft Word document files.

Export PDF to Plain Text [93] exports pages to Plain Text files.

Export PDF to Images

 Export PDF to Images

The **Export PDF to Images** action is used to export pages from documents to different raster image formats. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
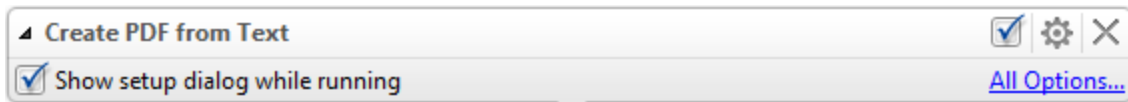

Figure 1. Export PDF to Images Options

- **Show setup dialog while running** is explained **here.** [197]
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
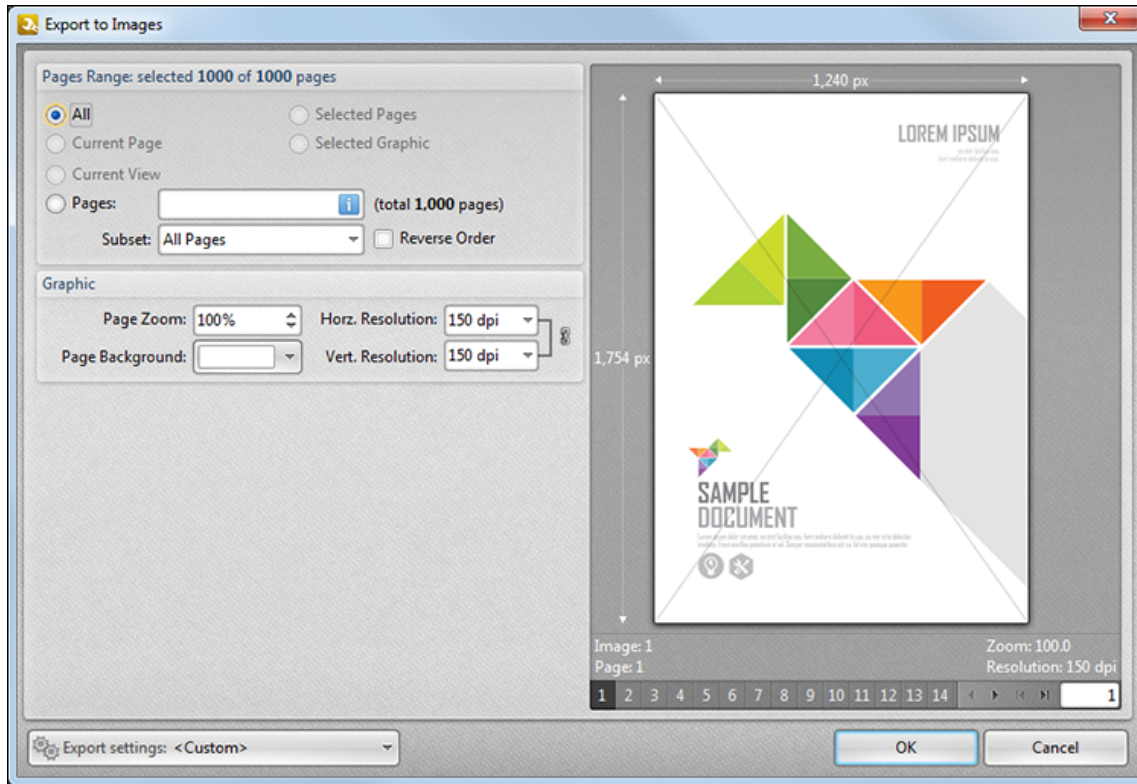
Figure 2. Export to Images Options

- **Pages Range** options are explained **here.** [191]
- **Page Zoom** selects the zoom in exported documents.
- **Page Background** selects the background color of exported documents.
- **Horz. Resolution** and **Vert. Resolution** select the resolution of exported documents. These settings are linked - if one is changed then the other changes automatically.
- Use the **Export Settings** menu to save custom settings:

- Click ⊞ to save current settings.
- Click 🚫 to delete the custom settings currently selected.
- Click ⚙ to manage settings that have been saved previously.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click 💾 **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Export PDF to Microsoft PowerPoint Presentation

 Export PDF to Microsoft Powerpoint Presentation

The **Export PDF to Microsoft Powerpoint Presentation** action is used to export pages from documents to Microsoft Powerpoint Presentation files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
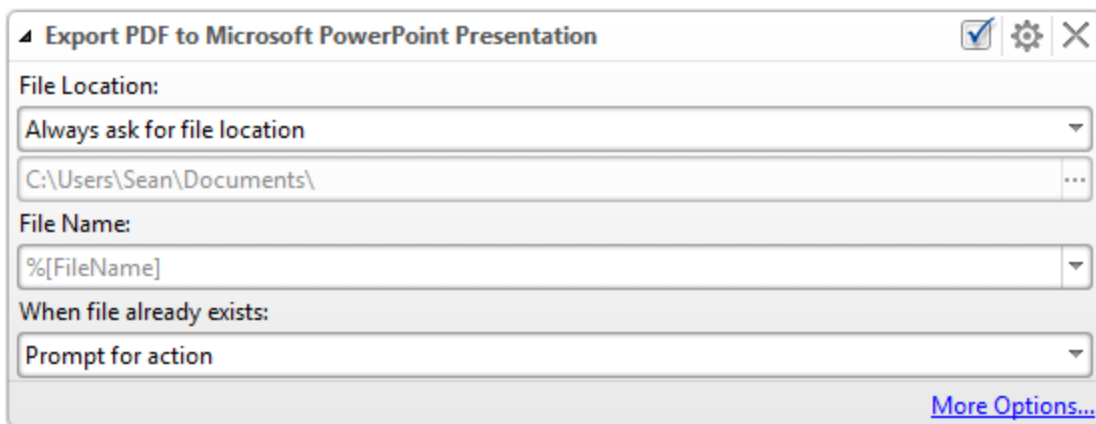
Figure 1. Export to Microsoft PowerPoint Presentation Options

- **File Location** determines where files are saved. There are three options: **Always ask for file location**, which means the tool will ask the user where on their computed files should be saved. **Use source folder as destination** means that the folder from which the original files came will also be the folder in which the new files are saved. **Use custom folder specified** allows the user to specify a folder in the text box below.
- **File Name** determines the name of new files, including any **macros.** 188
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. There are four options: **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.
- Click **More Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:

Figure 2. Options Dialog Box

- Select the **Convert entire page content to image box** as desired.
- Use the top **Resolution** menu to determine the rasterization quality for non-convertible content items.
- Use the **Mode** menu to determine the **Text Conversion Options.** The options are as follows:
    - **Preserve text editable** preserves the existing format of the text, which means it can be edited after conversion.
    - **Convert to curves** converts text into curves.
    - **Convert to images** converts text into image format.
- Select the **Embed all fonts** box to embed all fonts within the converted document. This increases the file size but ensures the fonts will be viewable on all machines. (It is recommended to embed fonts when the fonts within the document are uncommon. This is because most computers feature complete sets of the common fonts. Therefore they do not require an embedded set within imported documents to display them. However, if the fonts being used are uncommon it is less likely that the local computer will support them).

- Select the **Allow to use substitution for fonts that cannot be embedded** box as desired.
- Select the **Allow to convert a text that uses problematic fonts to curves** as desired.
- Use the bottom **Resolution** menu to determine the rasterization (image) quality of converted text.
- Select the **Include Comments** box as desired.
- When the desired details have been entered, click **OK** to apply them. Click **Cancel** to cancel the process and close the dialog box.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Export PDF to Microsoft Word Document

 Export PDF to Microsoft Word Document

The **Export PDF to Microsoft Word Document** action is used to export pages from documents to Microsoft Word document files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Export PDF to Microsoft World Document Options

- **File Location** determines where files are saved. There are three options: **Always ask for file location**, which means the tool will ask the user where on their computed files should be saved. **Use source folder as destination** means that the folder from which the original files came will also be the folder in which the new files are saved. **Use custom folder specified** allows the user to specify a folder in the text box below.
- **File Name** determines the name of new files, including any **macros.** [188]
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. There are four options: **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.
- Click **More Options** or the gear icon to select further options:
    - Select the **Include Comments** box as desired.
    - Select the **Include Images** box as desired.

- When the desired details have been entered, click **OK** to apply them. Click **Cancel** to cancel the process and close the dialog box.

Then, in the Edit Tools window:

- Click ⊟ **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Export PDF to Plain Text

 Export PDF to Plain Text

The **Export PDF to Plain Text** action is used to export pages from documents to Plain Text files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Export PDF to Plain Text Options

- **File Location** determines where files are saved. There are three options: **Always ask for file location**, which means the tool will ask the user where on their computed files should be saved. **Use source folder as destination** means that the folder from which the original files came will also be the folder in which the new files are saved. **Use custom folder specified** allows the user to specify a folder in the text box below.
- **File Name** determines the name of new files, including any **macros.** [188]
- **When File Already Exists** determines the action that the tool takes when the file name entered in the **File Name** box is already in use. There are four options: **Prompt for action** means that the tool will ask the user what action to take. **Overwrite with a new file** means the old file will be overwritten with the new one. **Keep existing file unchanged** means that the existing file remains how it is and the new file is not saved. **Save new with other unique name** means that the new file is saved with a new name.
- Click **More Options** or the gear icon to select further options:
    - Select the **Add numbering page to text file** box as desired.
    - Select the **Insert line breaks** box as desired.
    - Use the **End lines with** menu to determine the setting for **newlines.**

- Use the **Text Encoding** menu to determine the encoding format.
- When the desired details have been entered, click **OK** to apply them. Click **Cancel** to cancel the process and close the dialog box.

Then, in the Edit Tools window:

- Click ⊟ **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

4.4   Perform/Update PDF

Perform/Update PDF

The **Perform/Update PDF** actions are used to edit PDF documents. They have a huge range of functions - from adding Bates numbering and/or Watermarks to resizing, rotating and splitting/merging documents. These functions can be combined using the **Clone Tool** 41 or **Create Tool** 46 functions, which allow users to customize/create tools to meet specific requirements. The **Perform/Update PDF** actions are as follows:

Add Bates Numbering 97 inserts Bates Numbering for easy identification and retrieval of documents and pages within documents.

Add Header and Footer 100 inserts headers and footers with specific details into documents.

Add Watermarks 101 inserts watermarks in front of/behind documents.

Change Document Properties 103 inserts document properties such as title, author, subject and keywords.

Change Pages Background 106 changes the background behind the content on the document.

Convert to PDF/A 107 makes documents comply with the PDF/A standard, which optimizes them for long-term archiving.

Crop Pages 109 adjusts document dimensions, white margins and boxes.

Extract Images from PDF 111 searches for and extracts raster images from PDF documents.

OCR Pages 112 scans documents for images of text and recognizes text characters. It then inserts an invisible text layer for text selecting and searching etc.

Optimize Document 114 optimizes the size of documents to reduce their memory size.

Overlay PDF 118 overlays a PDF document with a second PDF document.

Remove Bates Numbering 120 removes Bates Numbering from documents.

Remove Headers and Footers [121] removes all existing header and footers from documents.

Remove Page Background [122] removes custom backgrounds from documents and restores the default background.

Remove Watermarks [123] removes all existing watermarks from documents.

Resize Pages [124] increases/reduces the size of document pages.

Rotate Pages [127] rotates document pages clockwise or counterclockwise.

Split/Merge Documents [129] combines all input PDF documents into one or splits them into new documents.

Please note that although these actions are geared towards PDF documents they are compatible with most industry-standard formats.

Add Bates Numbering

Add Bates Numbering

The **Add Bates Numbering** action is used to add Bates Numbering to PDF files. Bates Numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. See **here** for further information.

When the **Add Bates Numbering** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Add Bates Numbering Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
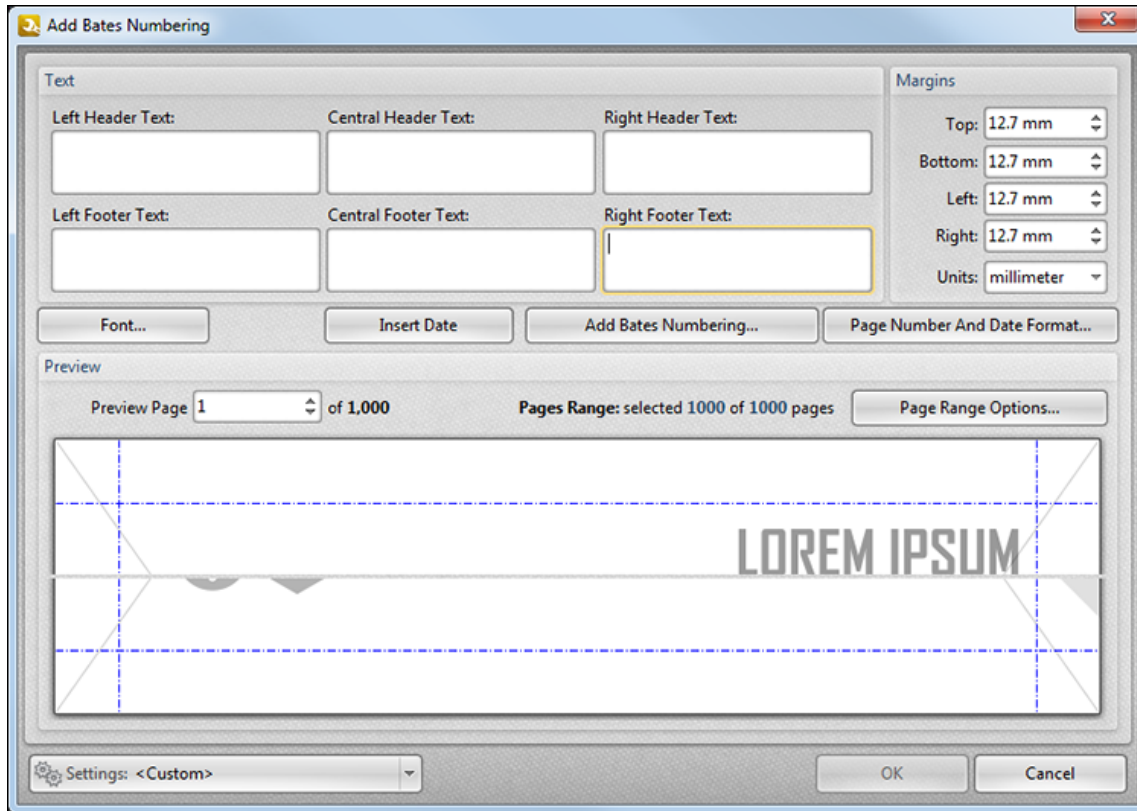
Figure 2. Add Bates Numbering Further Options

- Enter text into the text boxes to insert text at the locations indicated within documents. Click **Font** and **Insert Date** to select the **font settings** [186] and/or insert the date at the time of document creation.
- Click **Add Bates Numbering** to select Bates Numbering options.
- Click **Page Number And Date Format** to customize the date format, page number format and start page number options for Bates Numbering.
- Click **Margins** to adjust the text location.
- Enter page numbers into the **Preview Page** box to view pages in the preview window.
- Click **Page Range Options** to select the pages of the document that will feature the customized information entered in the steps above.

Use the **Settings** menu to save/delete customized settings for subsequent use and/or manage existing customized settings:

- Click ▦ to save the current settings.
- Click ▦ to delete the custom settings currently selected.
- Click ⚙ to manage settings that have been saved previously.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Add Header and Footer

Add Header and Footer

The **Add Header and Footer** action is used to insert headers and footers with specific details into PDF files. These details include the document title, page numbers, date and time of document creation, author name and graphics. Its operating instructions are identical to those of the **Add Bates Numbering** 97 action with one exception: the **Insert Page Number** replaces the **Add Bates Numbering** button:
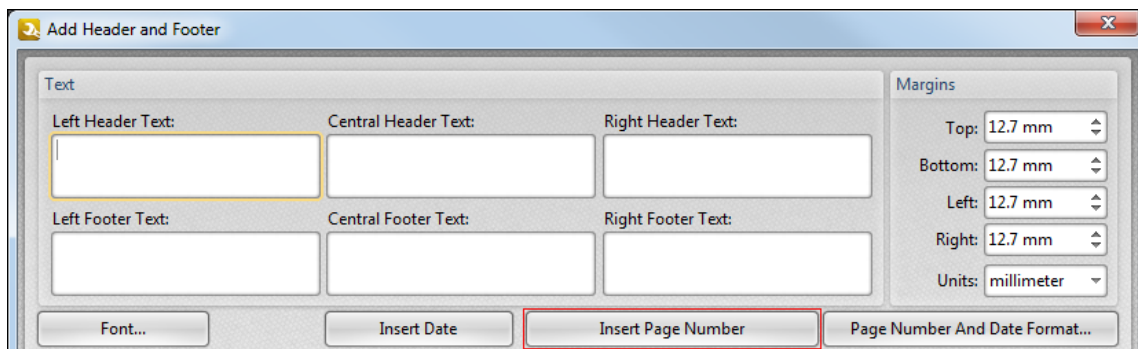
Figure 1. Add Header and Footer Options

- Select the required box for page numbers (**Left Header Text, Left Footer Text** etc) and then click **Insert Page Number** to insert page numbers.
- Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Add Watermarks

 Add Watermarks

The **Add Watermarks** action is used to add text/imagery either in front of or behind existing page content of PDF files. Watermarks are used predominantly to discourage counterfeiting. When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
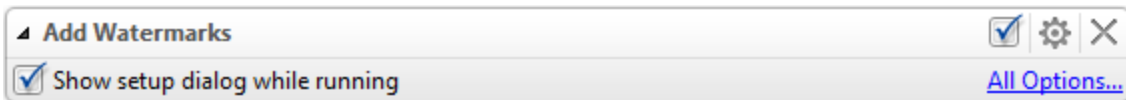
Figure 1. Add Watermarks Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon ⚙ to select further options. These are displayed in **(figure 2)** below:
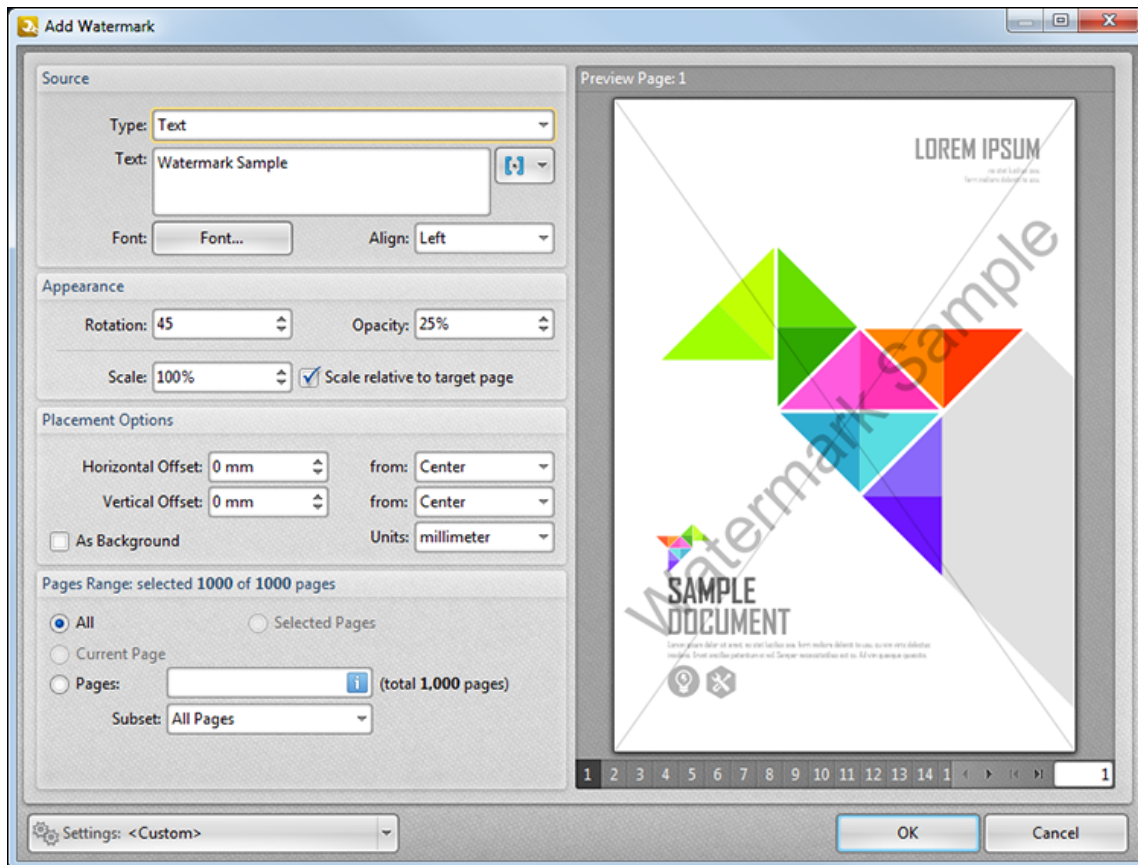
Figure 2. Add Watermark Further Options

- **Source** options determine the source of the watermark. Enter text into the box or select a file. If using text as the source then select the desired **font** 186 , 186 **macros** 188 and alignment options.
- **Appearance** options determine the rotation, opacity and scale of the watermark. The **Rotation** value determines the rotation of the watermark. The **Opacity** value determines the opacity (transparency) of the watermark. The **Scale** value determines the scale of the watermark in relation to either the target pane, if the indicated box is selected, or the size of the original image, if the box is not selected.
- **Placement** options determine the horizontal and/or vertical offset of the watermark from the left, right or center of the document.
- Select the **As Background** box to insert the watermark into the background as opposed to the foreground of the document.
- **Pages Range** options are detailed **here.** 191
- The **Preview Page** window displays a preview of pages. Select the numbers beneath the window to preview corresponding pages within the document.
- The **Settings** menu features two presets: **Draft** and **Confidential**. Select these to update the text that appears behind the document. It can also be used to save customized settings:

- Click ⬚ to save the current settings.
- Click ⬚ to delete the custom settings currently selected.
- Click ⬚ to manage settings that have been saved previously.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window::

- Click ⬚ **Save Changes** to save new settings.
- Click ⬚ **Close Edit** to end the current edit and revert to previous settings.

Change Document Properties

 Change Document Properties

The **Change Document Properties** action is used to edit properties of PDF files. When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Change Document Properties Options

- Select the check boxes to create/edit the **Title, Author, Subject, Keywords** and **Creator** properties of the document.
- Enter the desired details into the relevant fields.
- Use the menus to add **macros.** 188
- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
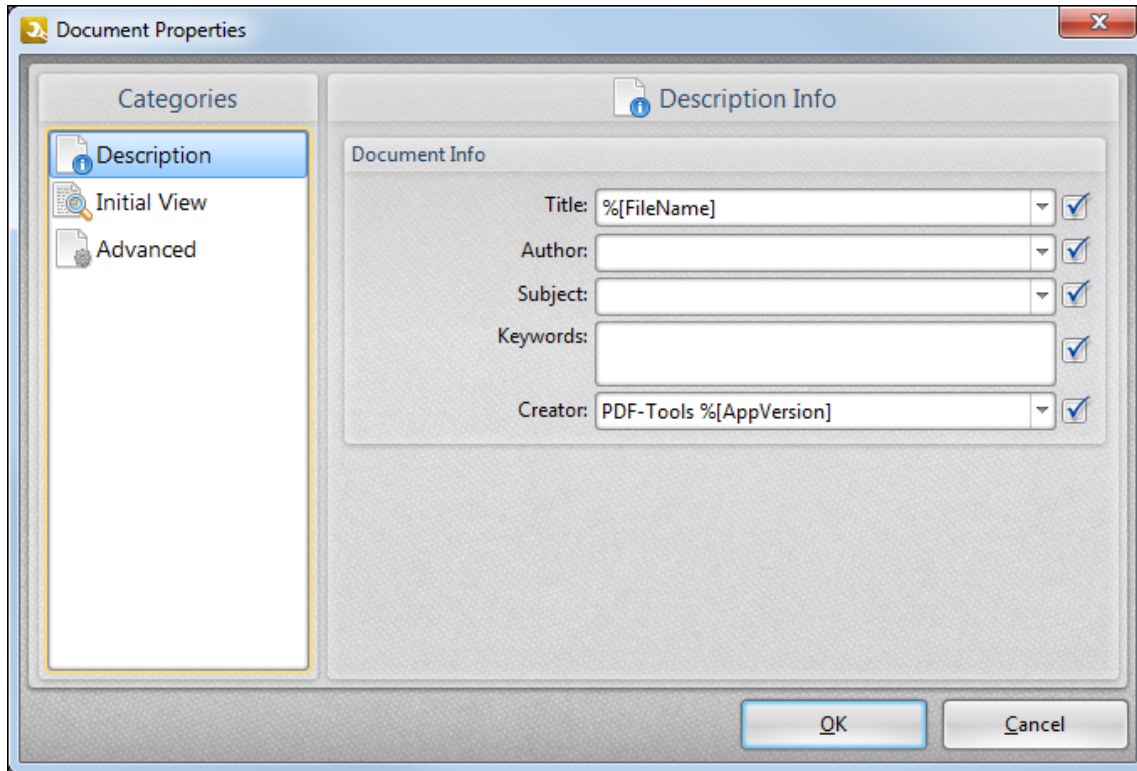
Figure 2. Document Properties Dialog Box, Description Tab Selected.

- The options in the **Description** tab identical to those outlined in *(figure 1)* above.
- The options in the **Initial View** tab determine the viewing settings when the new document is opened:
- The **Layout and Magnification** options are as follows:
  - **Navigation View** determines which panes are displayed with the document.
  - **Page Layout** determines the formation of the pages in the document.
  - **Magnification** determines the zoom level of the document.
  - **Open to Page** determines the page at which the document is opened.
- The **Window Options** determine the settings for the window in which the document is viewed:
  - **Show in Title** determines the title of the document.
  - Select the boxes to **Hide** elements of the window as desired.
  - Select the box to **Open in Full Screen Mode** as desired.
  - Select the box to **Resize window to initial** in order to resize the opened window to match the size of the original document.
  - Select **Center Window on screen** as desired.
- The options in the **Advanced** tab determine the **Print Dialog Presets** and **Reading Options:**
  - **Page Scaling** is enabled by default. This means that pages will be scaled to fit the paper size when they are printed. Select **None** to disable this option.
  - **Duplex Mode** can be used to print on both sides of printed sheets. Select **None** to disable duplex printing. Select **Long Edge** or **Short Edge** depending on how the document will be bound/viewed.

- Select the **Paper Size by Document Page Size** box as desired.
- Use the **Print Page Range** box to determine the page range that will be printed. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- The **Number of Copies** menu determines how many copies of the document are printed.
- The **Binding** menu determines the format for binding the document.
- The **Language** menu determines the language setting of the document.

When the desired settings have been selected, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Change Pages Background

Change Pages Background

The **Change Pages Background** action is used to edit the background of PDF files. Using this tool it is possible to add a full background color or local file content to documents When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Change Page Background Options

- **Show setup dialog while running** is explained **here.** [197]
- Click **All Options** or the gear icon ⚙ to select further options.

These options are identical to those of the **Add Watermark** [101] actions with one exception: instead of adding a watermark to the document, this action fills the entire background with the selected color/file.

- Click the **From Color** option button to select a background color.
- Click the **Name** option button to select a background file.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click 💾 **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Convert to PDF/A

 Convert to PDF/A

The **Convert to PDF/A** action is used to convert PDF documents to PDF/A format. This format is ideal for long-term storage and archiving of documentation. When the **Convert to PDF/A** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
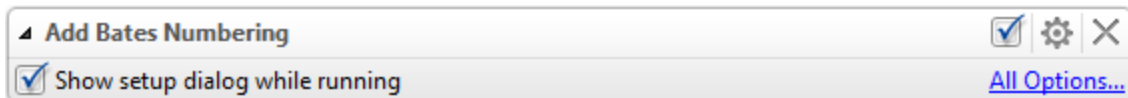

Figure 1. Convert to PDF/A Options

- **Show setup dialog while running** is explained **here.** [197]
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
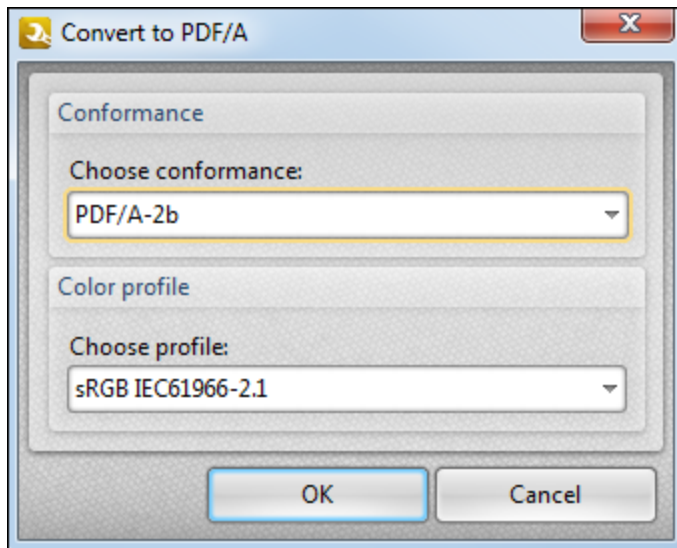
Figure 2. Convert to PDF/A Further Options

- Click the **Choose conformance** menu to select the file conformance. See **here** for an explanation of conformance options.
- Click the **Choose profile** menu to select the color profile.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Crop Pages

 Crop Pages

The **Crop Pages** action is used to crop pages of PDF files during the conversion process. It adjusts the visible page area, white margins and/or sets the **page boxes.** 182

When the **Crop Pages** action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Crop Pages Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon ⚙ to select further options. These are displayed in *(figure 2)* below:

Figure 2. Crop Pages Further Options

Crop Margins

PDF documents feature up to five boxes that determine their content and appearance. They are the Media Box, Crop Box, Bleed Box, Trim Box and Art Box. **PDF-Tools.** uses four of these boxes to determine customizable settings. See **here**[182] for further information.

- Select the **Show All Boxes** box to view all four boxes in the preview window.
- Use the **Crop Method** menu to select the cropping method. There are four options. Three of these: **Remove All White Spaces, Remove Vertical White Spaces** and **Remove Horizontal White Spaces** have predefined and self-explanatory settings that cannot be changed. The fourth option, **Manual Control of Margins**, allows the user to define the boxes and margins.
- Use the **Apply to Box** menu to select and edit box margins.
- Enter the desired measurements for the **Left, Right, Top** and **Bottom** margins of the selected box.
- Select the **Constrain Proportions** box to maintain the ratio of margins. For example if the margin in the **Left** box is changed to 5mm then the margins in the **Right, Top** and **Bottom** boxes will also be changed to 5mm.
- Use **Set to Zero, Revert to Original** and **Set To White Margins** to apply these functions to boxes selected in the **Apply to Box** menu.
- Select the **Remove the content outside of the crop box area** box to remove content outside the crop box. Any information cropped away by the crop box will not be removed from the file's underlying code unless this option is selected.

Pages Range

See **here**[191] for an explanation of the **Pages Range** settings.

Click **OK** to save your settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click 💾 **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Extract Images from PDF

 Extract Images from PDF

The **Extract Images from PDF** action is used to search PDF documents for raster images to extract and save to disk. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
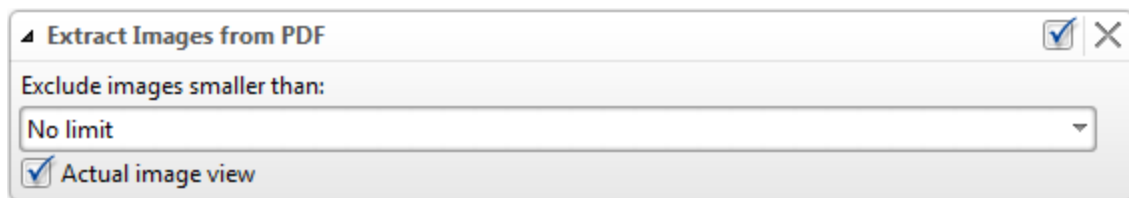

Figure 1. Extract Images from PDF Options

- Use the **Exclude images smaller than** menu to exclude images smaller than a given size from the extraction process. Select one of the preset minimum sizes or enter the size manually into the box.
- Select the **Actual image view** box to save images as they appear within the original document. Clear the box to save images in their original format - any resize or rotation of images that has taken place will be reversed when the image saves.

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

OCR Pages

 OCR Pages

The **OCR Pages** action is used to optically recognize text characters in PDF files. It also creates a selectable and searchable text layer. Documentation that has undergone the OCR process is much easier to search using software as a result. It also means that retyping documents can be avoided if a digital file is deleted in error.

When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
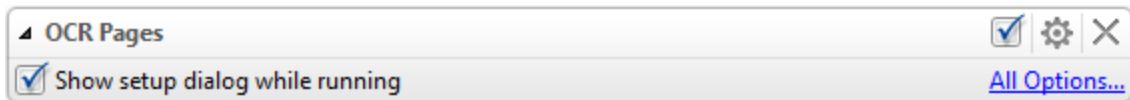
Figure 1. OCR Pages Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
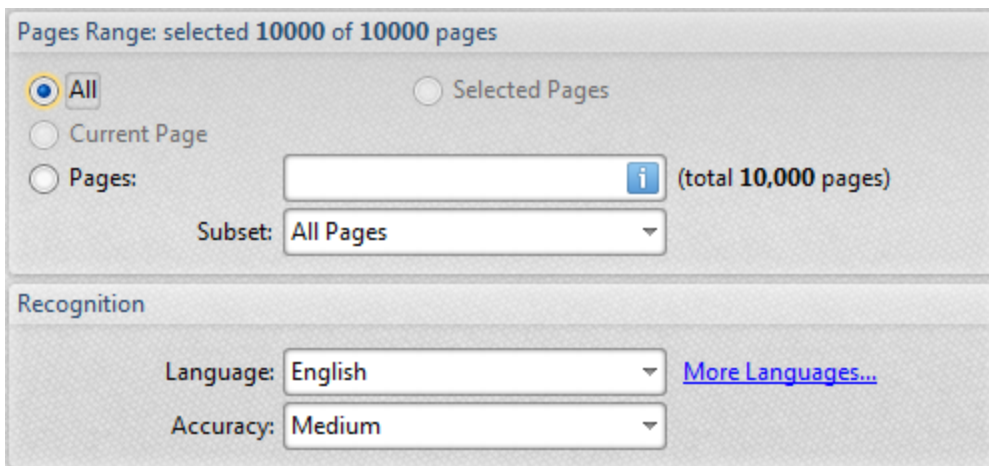
Figure 2. OCR Pages Further Options

- The **Pages Range** options are explained **here.** 191
- The **Recognition** options determine the language and accuracy of the OCR process. Increasing the accuracy increases the time that the process takes and vice versa.

- Click **Save Changes** to save new settings.

- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

Optimize Document

Optimize Document

The **Optimize Document** action is used to optimize and reduce the size of PDF files in order to save space. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Optimize Document Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
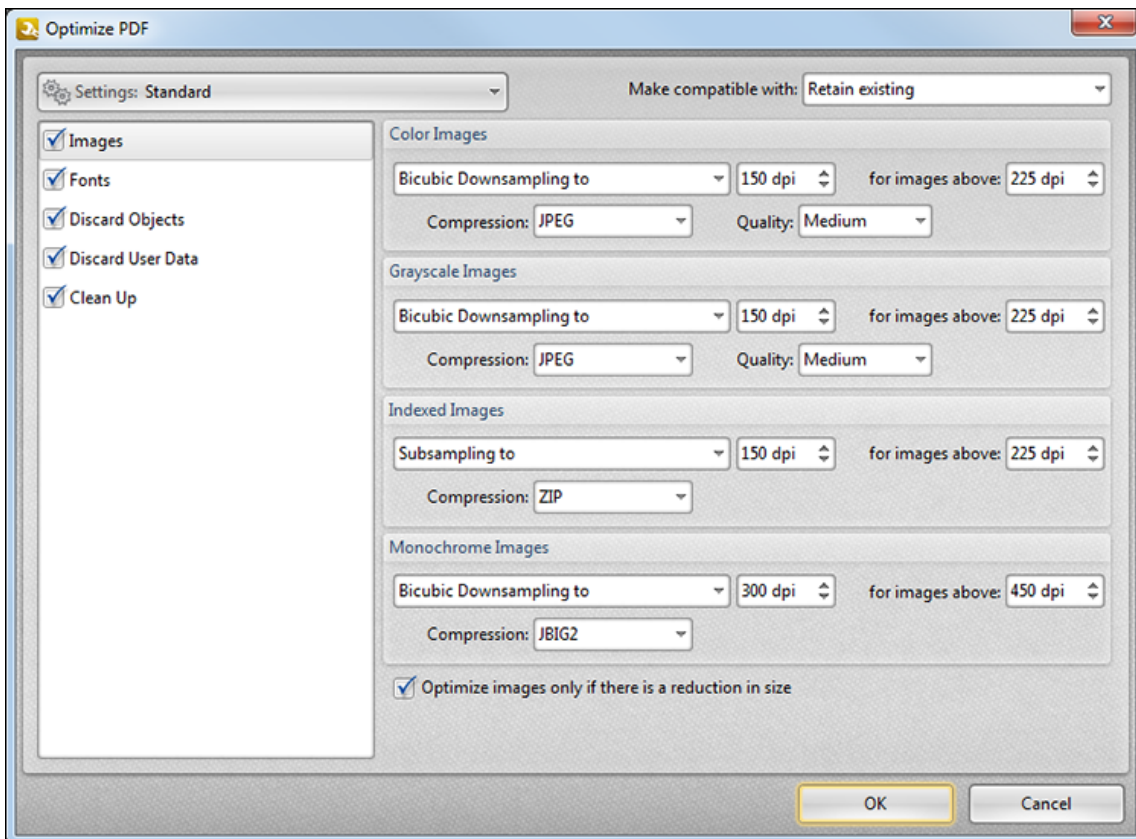
Figure 2. Optimize PDF Options

- Click the **Settings** menu to select **Standard** or **Mobile** settings. **Standard** settings are the default settings and suitable for all devices. **Mobile** settings are customized to suit mobile devices. The **Settings** menu is also used to **Save, Delete** and **Manage** user-customized settings:

- Click to save current settings.
- Click to delete the custom settings currently selected.
- Click to manage settings that have been saved previously.

- Click the **Make compatible with** menu to select the format with which new files are compatible.
- Select **Images** to customize the optimization of images. See *(figure 3).*
- Select **Fonts** to customize the optimization of fonts. See *(figure 4).*
- The **Discard Objects, Discard User Objects** and **Clean Up** options relate to further ways to optimize documents. They remove elements of PDF files to reduce the file size, some of which are selected by default. Select/clear options as desired.

Images

The Images options are displayed below:

Figure 3. Images Options

- Click the **Color Images, Grayscale Images, Indexed Images** and **Monochrome Images** menus to select settings for respective image formats.
- Click the **Bicubic Downsampling/Subsampling** menus to reduce/increase the resolution of images.
- Click the arrows in the **dpi** box, or enter a figure manually, to select the dots-per-inch resolution for new images.
- Click the arrows in the **for images above** box, or enter a figure manually, to select the minimum **dpi** at which images are downsampled/subsampled.
- Click the **Compression** menus to select the compression format of images. Where applicable click the **Quality** menu to select the compression quality.
- **Optimize images only if there is a reduction in size** is selected by default. Clear this box to optimize images even when there is no reduction in size.

Font Unembedding Settings

These settings are displayed below:
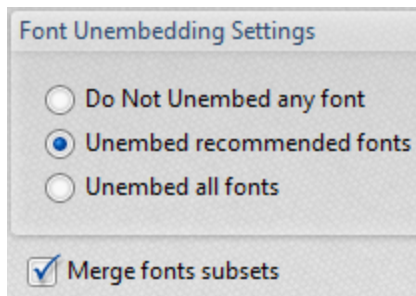
Figure 4. Fonts Options

Unembedding fonts removes embedded fonts from documents. This reduces the file size but can also affect the formatting if the font is not present on the end user's machine. Therefore, if the resulting font is unsafe, select the **Do Not Unembed any font** option button. Alternatively, select **Unembed recommended fonts** or **Unembed all fonts.** The **Merge fonts subsets** box is selected by default. This saves space when documents are merged.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Overlay PDF

Overaly PDF

The **Overlay PDF** action is used to overlay PDF files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
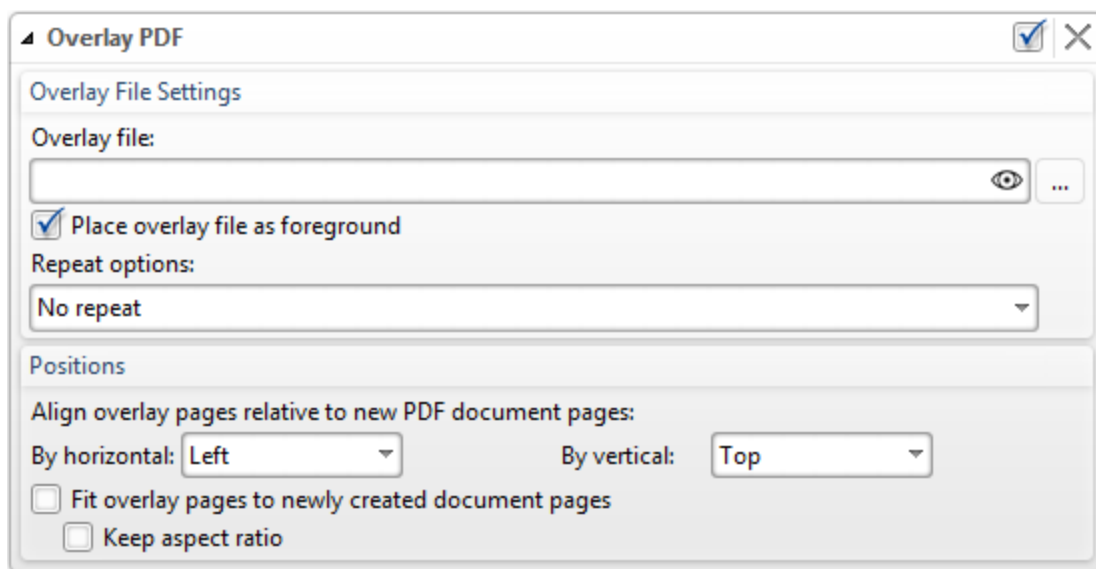
Figure 1. Overlay PDF Options

- Use the **Overlay File** box to enter the name of the file to be used as the overlay on the active document. Alternatively, click the icon or the ellipsis symbol to select a file from the local computer.
- Select the **Place overlay file as foreground** box to position the selected file in the foreground. (The default setting is for overlaying files to be positioned in the background of the active document).
- The **Repeat Options** determine what happens when the pages of the overlay document do not match numerically with the pages of the PDF file. For example, if the overlay document is three pages long and the PDF file is six pages long then the overlay document will match only the first three pages of the PDF file if the **No Repeat** option is selected - the remaining three pages will not feature an overlay. If the **Repeat Last Page of Shorter Overlay File** option is selected then the final page of the overlay document will be repeated on all pages of the PDF file that exceed the number of pages in the overlay document. If the **Continuous Repeat of Shorter Overlay File** option is selected then all pages of the overlay document will be repeated from the beginning when the number of pages in the PDF file exceeds the number of pages in the overlay document.

- The **Positions** options determine the positioning of the overlay relative to the PDF document. **By Horizontal** determines the horizontal position and has the options **Left, Center** and **Right. By Vertical** determines the vertical position on the page and has the options **Top, Middle** and **Bottom.**
- Select the **Fit Overlay Pages to Newly Created Document Pages** box to size the overlay to fit the new PDF file. This may distort images/text if the sizes are significantly different.
- Select the **Keep Aspect Ratio** box to retain the aspect ratio of the overlay.

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Remove Bates Numbering

 Remove Bates Numbering

The **Remove Bates Numbering** action is used to remove Bates Numbering from PDF documents. Bates Numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. See **here** for further information.

Add this action to the Tools Action Sequence to remove Bates Numbering from files when the tool runs.

Remove Headers and Footers

Remove Headers and Footers

The **Remove Headers and Footers** action is used to remove headers and footers from PDF documents. Add this action to the Tools Action Sequence to remove Headers and Footers from files when the tool runs.

Remove Page Background

Remove Page Background

The **Remove Page Background** action is used to remove custom backgrounds from PDF documents. Add this action to the Tools Action Sequence to restore default background settings to files when the tool runs.

Remove Watermarks

Remove Watermarks

The **Remove Watermarks** action is used to remove watermarks from PDF documents. Add this action to the Tools Action Sequence to remove watermarks from files when the tool runs.

Resize Pages

Resize Pages

The **Resize Pages** action is used to increase or reduce the size of pages within PDF files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Resize Pages Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon ⚙ to select further options. These are displayed in *(figure 2)* below:
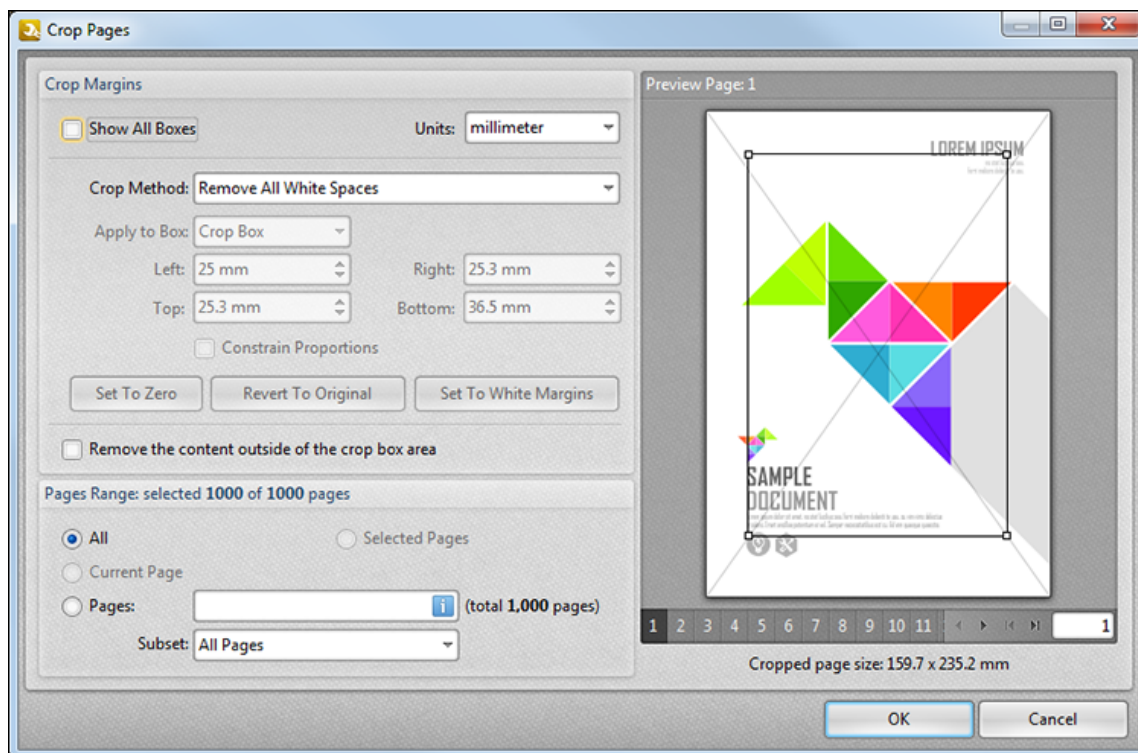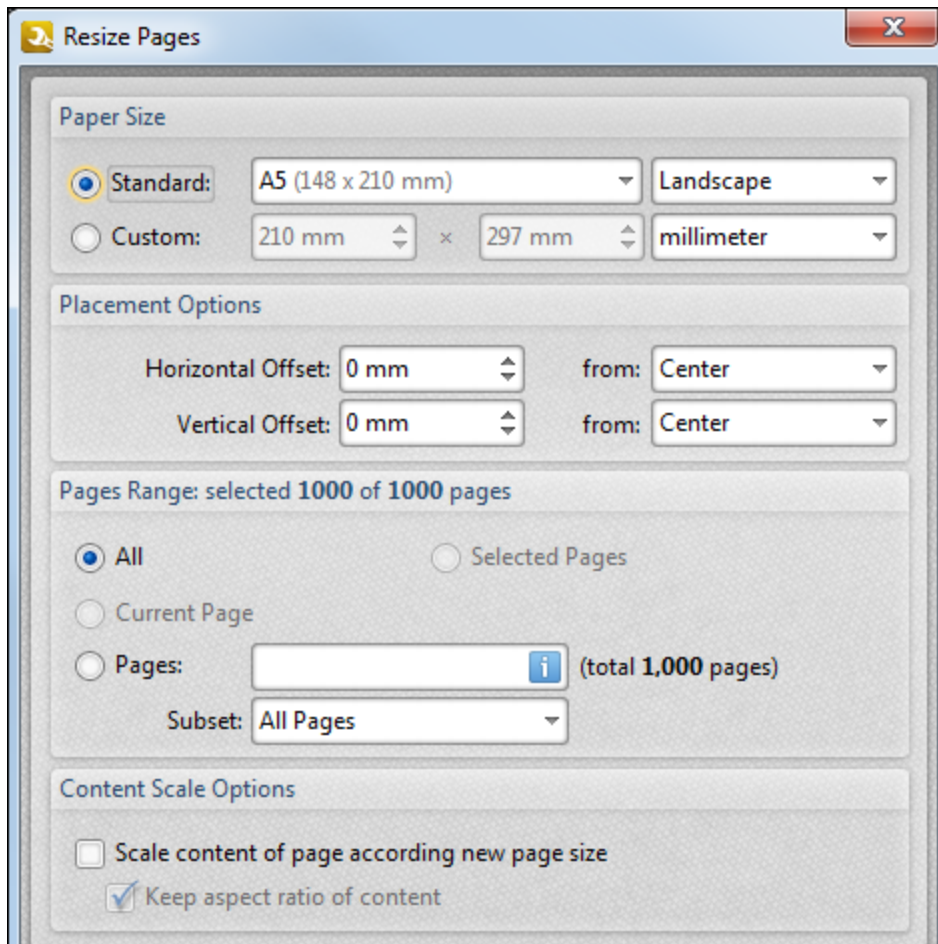
Figure 2. Resize Pages Further Options

- The **Paper Size** options determine the size and layout of new pages. Click the **Standard** option button to select standard sizes such as those used by the **ISO** and **ANSI**. Use the menu in the adjacent box to select either **Landscape** or **Portrait** as the page orientation.
- Click the **Custom** option button to enter custom dimensions.
- The **Placement** options determine the horizontal/vertical offset of resized pages and the location from which the offset is made.
- The **Pages Range** options are explained **here.** 191
- The **Content Scale** options determine the scale of the page content in relation to the new page size. The **Keep aspect ratio of content** box is selected by default, which means the page content remains as it was when pages are resized. Select the **Scale content of page according new page size** box to scale the content of original page to the new page size. This is carried out as far as the aspect ratio will allow. Clear the **Keep aspect ratio of content** box to scale all content of the original page to the new page size.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click **Save Changes** to save new settings.
- Click **Close Edit** to end the current edit and revert to previous settings.

Rotate Pages

 Rotate Pages

The **Rotate Pages** action is used to rotate pages within PDF files. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:

Figure 1. Rotate Pages Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon to select further options. These are displayed in *(figure 2)* below:
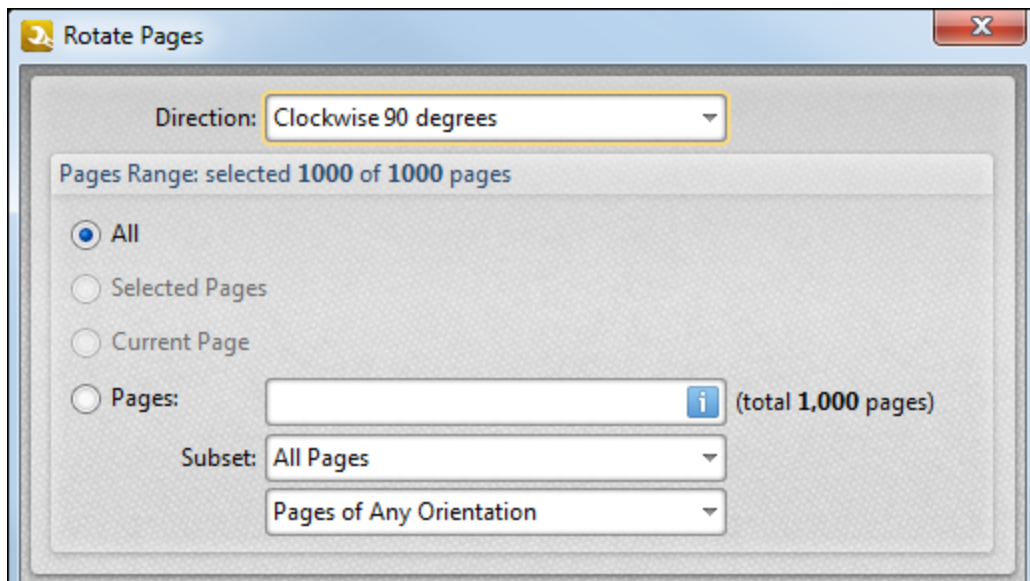
Figure 2. Rotate Pages Further Options

- Click the **Direction** menu to select the direction of rotation.
- **Pages Range** options are explained **here.** 191
- Use the **Pages of Any Orientation** option to determine the orientation of pages included in the page range. The default setting is **Pages of Any Orientation**, I.e. all pages in the page range. Use the menu to select either Portrait Pages or Landscape Pages.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click ![save icon] **Save Changes** to save new settings.
- Click ![close icon] **Close Edit** to end the current edit and revert to previous settings.

Split/Merge PDFs

 Split/Merge Documents

The **Split/Merge PDFs** action is used to split or merge PDF documents. This makes it possible to separate pages from a single document into individual PDF files or combine several documents into a single PDF file.

When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
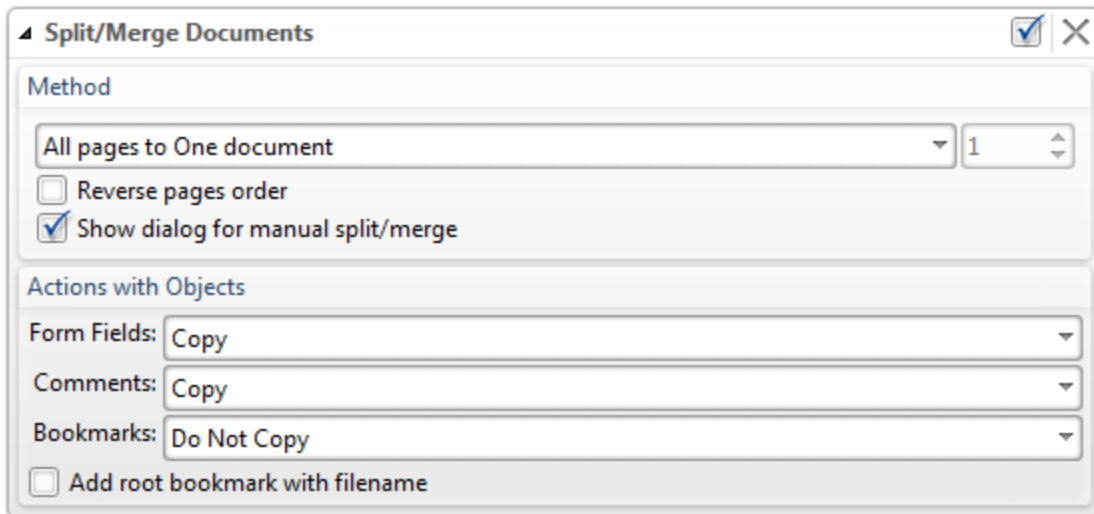
Figure 1. Split/Merge Documents Options

Method Options

Click the **Method** menu to select the manner in which pages are split/merged. There are four options:

- **All pages to One document** merges all pages into a single document.
- **Every N pages in Separate document** separates multiple page documents into separate documents of *n* pages. Enter a value for *n* in the adjacent menu. For example, if a document of nine pages is selected and the value for *n* is three, then three documents containing three pages will be created and they will be grouped 1-3, 4-6 and 7-9.
- **Keep input documents as is** retains the original format of documents.

- **Split by top bookmarks** separates documents according to their top-level bookmarks, such as chapters.

Actions with Objects

These settings determine the actions for objects within pages.

- The options with **Form Fields** and **Comments** are **Copy, Flatten** and **Do Not Copy.**
- The options with **Bookmarks** are **Do Not Copy, Copy All** and **Copy Related.**
- The **Add root bookmark with filename** box is cleared by default. Select the box to add the original filenames to the bookmarks of the merged documents.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Then, in the Edit Tools window:

- Click ▢ **Save Changes** to save new settings.
- Click ⊗ **Close Edit** to end the current edit and revert to previous settings.

4.5 Secure PDF

Secure PDF

The **Secure PDF** actions are used to manage the security of PDF documents. They are used to add/remove digital signatures, timestamps and passwords. Adding these features increases the security of documents using certificates from certified sources. The actions that apply to the security of PDF documents are as follows:

Add Digital Signature 132 uses a certificate-based digital ID to add and sign a new signature field.

Add Timestamp 134 adds a document-level time stamp to establish document contents at a specified time.

Certify Document 136 adds a certified signature field to documents.

Clear Digital Signature 137 removes digital signatures where possible.

Secure Document 138 adds password controls to documents.

Add Digital Signature

Add Digital Signature

The **Add Digital Signature** action is used to add digital signatures to PDF files. Digital signatures demonstrate the authenticity of documents and are used for official verification on the internet. When this action is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
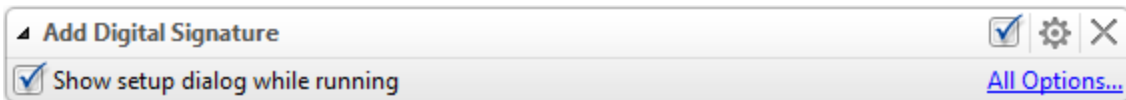
Figure 1. Add Digital Signature Options

- **Show setup dialog while running** is explained **here.** [197]
- Click **All Options** or the gear icon to select further options. These are displayed in **(figure 2)** below:
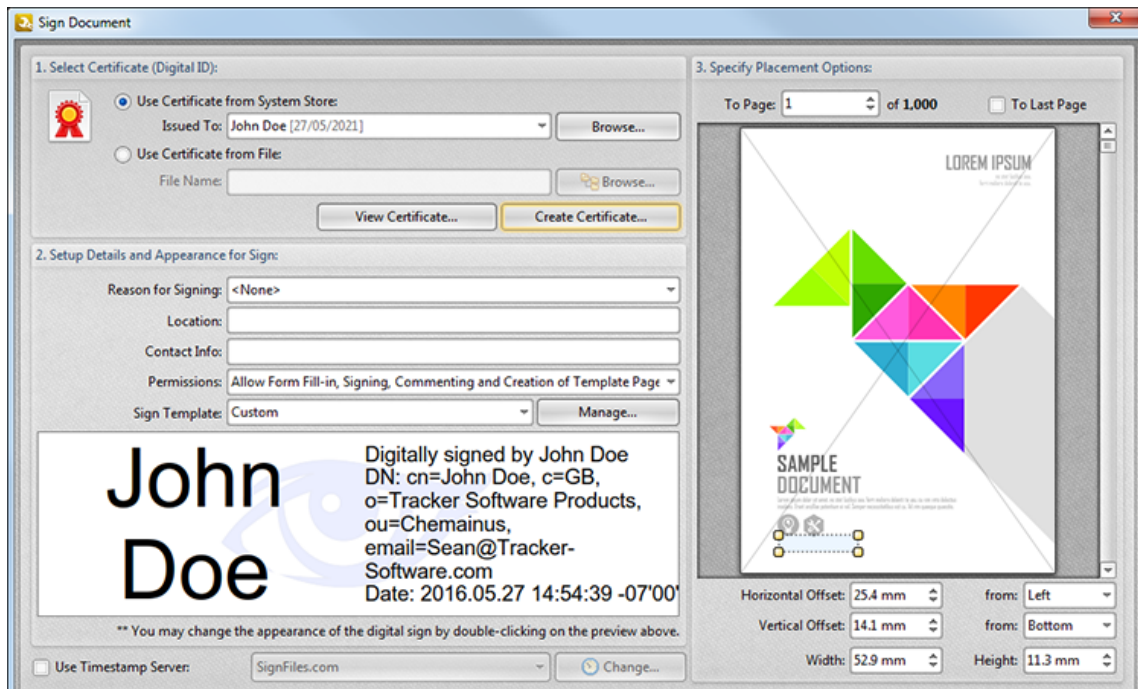

Figure 2. Sign Document Dialog Box

Select Certificate

- Select a certificate from either the system store or the files on the local computer.
- Click **View Certificate** to view details about the certificate currently selected.
- Click **Create Certificate** to create a new certificate.

Setup Details and Appearance for Sign

Digital signatures can be customized further as follows:

- Click the **Reason for Signing** menu, or enter text into the box manually, to add a reason for signing the document.
- Click the **Location** box to enter a location for where the document is signed.
- Click the **Contact Info** box to add contact information to the signature.
- Click the **Permissions** box to select changes permissible after the document has been signed.
- Click the **Sign Template** menu to select layout options for the signature and associated information.
- Click **Manage** to further customize the **Sign Template.**
- Select the **Use Timestamp Server** box to select a timestamp server to add to the signature.
- Click **Change** to open the **Timestamp Server** dialog box add a new timestamp server.

Specify Placement Options

- Click the **To Page** box, or use the arrows, to select the page for the digital signature.
- Click the **Horizontal Offset** and **Vertical Offset** boxes, and their associated **from** boxes, to place the signature within the selected page. Alternatively, use the pointer to select the virtual outline of the signature on the preview page and place it manually.
- Click the **Width** and **Height** boxes, or use the arrows, to select the size of the virtual outline of the signature within the preview page.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Add Timestamp

 Add Timestamp

The **Add Timestamp** action is used to add document-level timestamps to PDF files. These establish the exact contents of the file at the time indicated by the time stamp, which is obtained from a specified time stamp authority. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
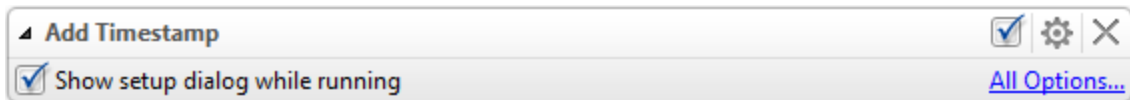
Figure 1. Add Timestamp Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon ⚙ to select further options. These are displayed in *(figure 2)* below:
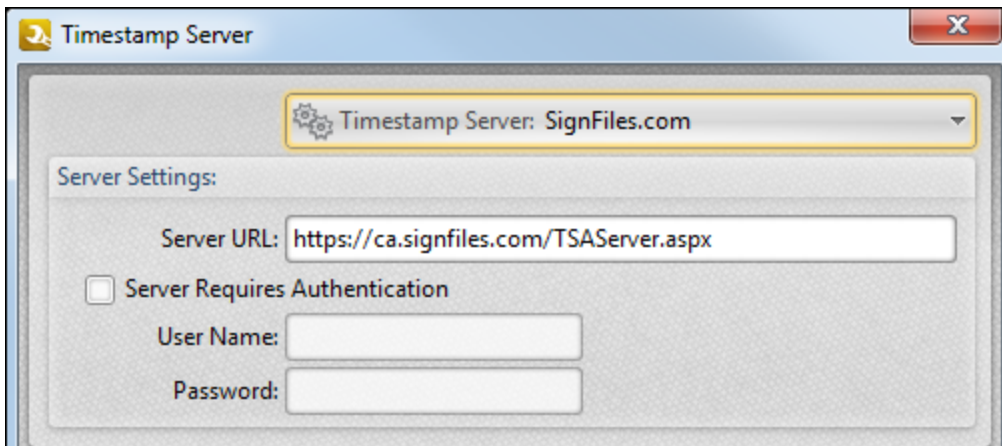
Figure 2. Timestamp Server Options

- Click the **Timestamp Server** menu to select a server for the timestamp.
- When using a new timestamp server for the first time, enter the website address into the **Server URL** text box.
- Select the **Server Requires Authentication box** to require authentication when the timestamp is added. Enter the details into the **User Name** and **Password** text boxes.

When new details have been entered, click the **Timestamp Server** drop menu and:

- Click **Save Current Settings** to save custom settings.

- Click **Delete** to delete the custom preset mode currently selected.

- Click **Manage** to manage custom preset modes.

When the required details have been selected, click **OK** to to save changes. Click **Cancel** to close the window and revert to previous settings.

Certify Document

![Certify Document icon] **Certify Document**

The **Certify Document** action is used to secure documents with a certified signature field. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
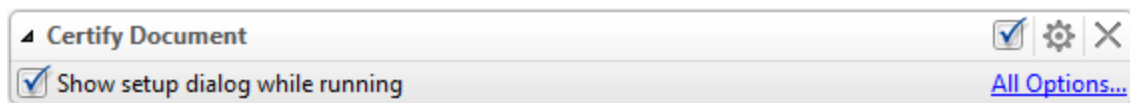
Figure 1. Certify Document Options

- **Show setup dialog while running** is explained **here.** 197
- Click **All Options** or the gear icon ⚙ to select further options. They are identical to the **Add Digital Signature** 132 options. However, once a document has been signed and certified using this action, it can no longer be edited.

Clear Digital Signatures

Clear Digital Signatures

The **Clear Digital Signatures** action is used to clear digital signatures from documents. Add it to the Tool Actions Sequence to include this process in the conversion of files. Digital signatures will be replaced with unsigned signature fields when the tool in question runs.

Secure Document

Secure Document

The **Secure Document** action uses password protection to secure documents. When it is displayed in the Tool Info Pane or the Tool Actions Sequence the following options are available:
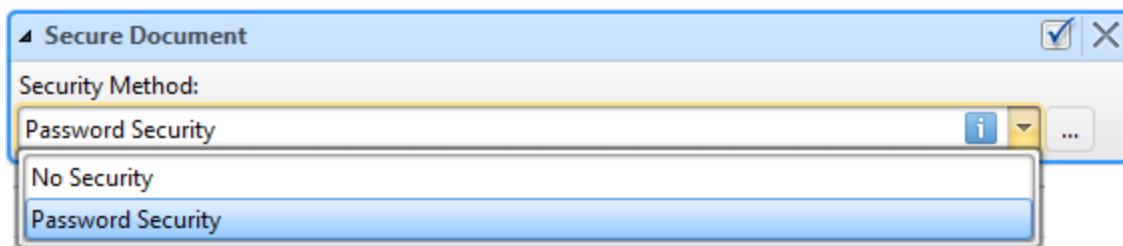

Figure 1. Secure Document Options

Click **Password Security** in the **Security Method** menu, or the ellipsis icon, to customize the password options. The **Password Security Settings** dialog box will open:
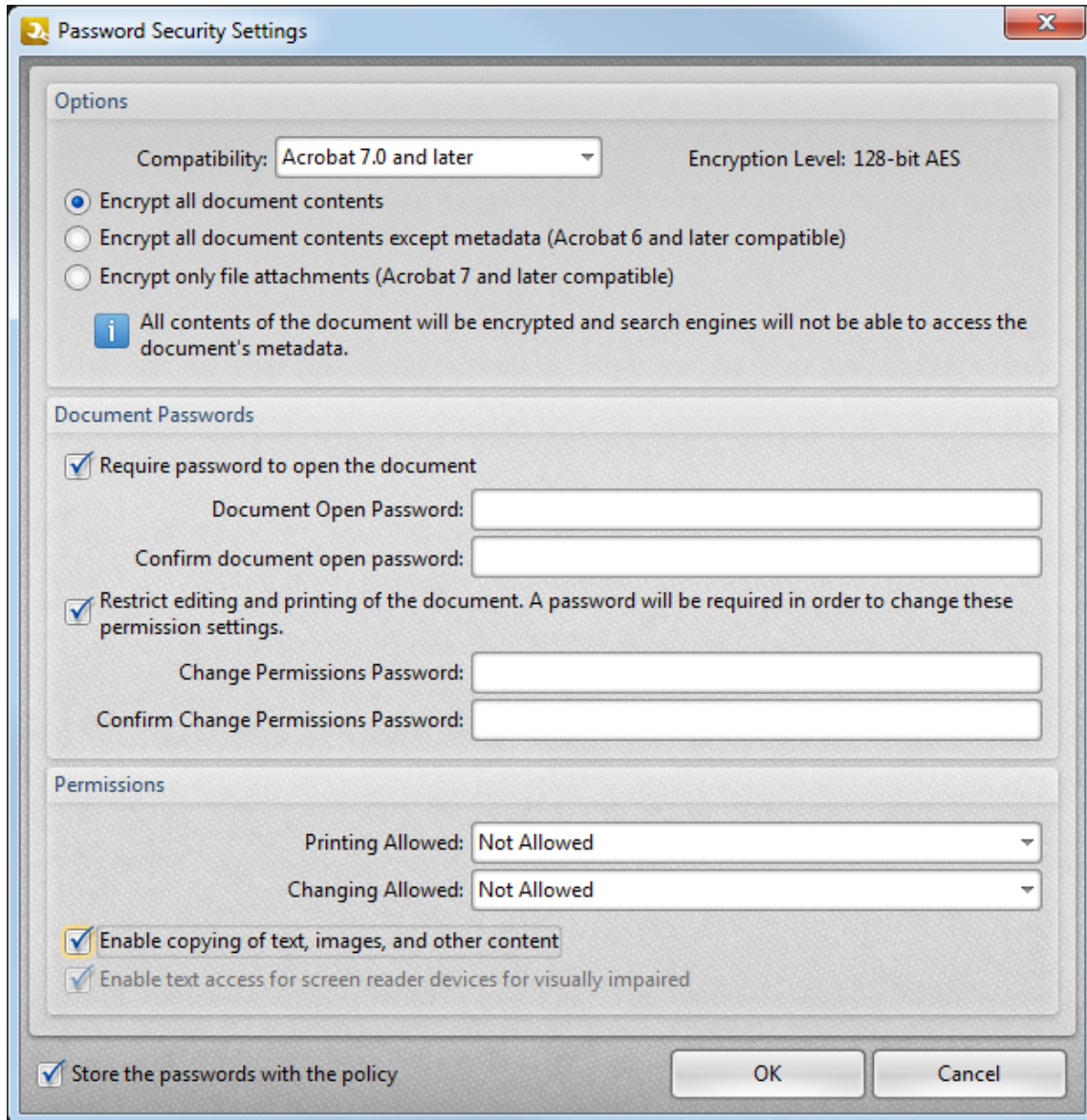
Figure 2. Password Security Settings

- Click the **Compatibility** menu to select the password compatibility.
- Select the relevant encryption option from the three option buttons.
- Select the **Require password to open the document** box to set a password for the document. Enter the password into the **Document Open Password** and **Confirm document open password** text boxes.
- Select the **Restrict editing and printing of the document** box to set a password to enable editing and printing of the document. Enter the password into the **Change Permissions Password** and **Confirm Change Permissions Password** text boxes.
- Select the **Printing Allowed** and **Changing Allowed** menus to select the printing and editing options that the password entered in the **Document Passwords** tab will allow.

- Select the **Enable copying of text, images, and other content** box to enable the copying of that content.
- Select the **Enable text access for screen reader devices for visually impaired** and **Store the passwords with the policy** boxes as required.

Click **OK** to save changes. Click **Cancel** to revert to previous settings and close the window.

5 Standard Tools

Standard Tools

There are twenty-six **Standard Tools** in **PDF-Tools.** They are used to convert files to PDF/PDFA format, add/remove features to documents such as Bates numbering or headers and footers, resize, rotate, OCR and secure documents. The functions of these tools can be combined using the **Clone Tool** 41 or **Create Tool** 46 features of **PDF-Tools.** This makes it possible for users to create tailor-made tools in order to meet highly-specific requirements.

The **Standard Tools** are as follows:

Add Bates Numbering 143 inserts Bates Numbering into documents.

Add Digital Signature 144 creates new signature fields within documents.

Add Header and Footer 145 inserts headers and footers into documents.

Add Watermark 147 adds a watermark to documents.

Convert Files to PDFs 152 converts input files with supported formats to PDF format.

Create PDF from Images 149 creates a single PDF document from one or more raster images.

Scan to PDF 166 uses a scanner to create a new PDF document from a paper document.

Certify PDFs 148 secures documents using certified signatures.

Convert to PDF/A 151 converts PDF documents to the PDF/A standard, which is ideal for long-term archiving.

Create PDF from Text 150 creates a single PDF document from one or more text files.

Crop Pages 153 adjusts the visible page area.

Extract Images from PDF 154 locates raster images in documents and extracts them to files on disk.

Export PDF to Images 156 exports pages from PDFs to raster image formats.

Export PDF to Microsoft Powerpoint Presentation ⁸⁸ exports pages to Microsoft Powerpoint Presentation files.

Export PDF to Microsoft Word Document ⁹¹ exports pages to Microsoft Word document files.

Export PDF to Plain Text ⁹³ exports pages to Plain Text files.

Extract Pages ¹⁵⁵ extracts specified pages to a new document.

OCR Pages ¹⁶⁰ uses optical recognition to identify text within documents and creates a selectable layer over the text.

Optimize PDF ¹⁶² optimizes the document content in order to reduce the file size.

Overlay ¹¹⁸ **PDF** ¹¹⁸ overlays a PDF document with a second PDF document.

Resize Pages ¹⁶⁵ adjusts the size of pages within documents.

Rotate Pages ¹⁶⁴ rotates specified pages within documents.

Secure PDF ¹⁶⁹ sets up password protection for opening/editing documents.

Set Pages Background ¹⁶⁸ inserts a solid color of graphic to the background of the document.

Split/Merge PDFs ¹⁷⁰ combines/separates multiple PDFs into new documents.

Timestamp PDFs ¹⁷¹ adds a server-authorized time stamp that establishes document contents at a given time.

Please note that although these tools are geared towards PDF documents they are compatible with most industry-standard formats.

5.1 Add Bates Numbering

Add Bates Numbering

The **Add Bates Numbering** tool inserts Bates Numbering into documents. Bates Numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. See **here** for further information.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files into which Bates Numbering will be inserted. See **here** 57 for further options.

2. Add Bates Numbering

Bates Numbering is inserted into the selected files. See **here** 97 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Add Bates Numbering** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new files are saved. See **here** 64 for further options.

5. Show Files

The new files are displayed to the user. See **here** 69 for further options.

Double-click on tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.2   Add Digital Signature

Add Digital Signature

The **Add Digital Signature** tool adds new signature fields to documents and signs them using a certificate-based digital ID. Digital signatures demonstrate the authenticity of documents and are used for official verification on the internet.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file into which the digital signature will be inserted. See **here** 57 for further options.

2. Add Digital Signature

The digital signature is inserted into the selected file. See **here** 132 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Add Digital Signature** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.3   Add Header and Footer

 Add Header and Footer

The **Add Header and Footer** tool inserts headers and/or footers with specific details into PDF files. These details include the document title, page numbers, date and time of document creation, author name and graphics.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file into which headers and/or footers will be inserted. See **here** 57 for further options.

2. Add Header and Footer

Headers and/or footers are inserted into the selected file. See **here** 100 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Add Header and Footer** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.4 Add Watermark

Add Watermark

The **Add Watermark** tool inserts watermarks into documents. Watermarks are used predominantly to discourage counterfeiting.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file into which watermarks will be inserted. See **here** 57 for further options.

2. Add Watermark

The watermark is inserted into the selected file. See **here** 101 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Add Watermark** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.5   Certify PDFs

Certify PDFs

The **Certify PDF** tool inserts a certified signature field into documents.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file to certify. See **here** 57 for further options.

2. Certify PDFs

The tool inserts a certified signature field into the selected file. See **here** 136 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Certify PDFs** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.6 Create PDF from Images

Create PDF from Images

The **Create PDF from Images** tool creates a single PDF document from one or more raster images.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the image that will be converted into PDF format. See **here** 57 for further options.

2. Create PDF from Images

The new PDF file is created from the selected file. See **here** 72 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Create PDF from Images** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new PDF file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.7   Create PDF from Text

Create PDF from Text

The **Create PDF from Text** tool creates a single PDF document from one or more text files.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the text file that will be converted into PDF format. See **here** 57 for further options.

2. Create PDF from Text

The new PDF file is created from the selected file. See **here** 79 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Create PDF from Text** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new PDF file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.8 Convert to PDF/A

 Convert to PDF/A

The **Convert to PDF/A** tool converts PDF files into the PDF/A format, which is ideal for long-term storage and archiving.

This tool uses four of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the PDF file that will be converted into PDF/A format. See **here** 57 for further options.

2. Convert to PDF/A

The new PDF/A file is created from the selected file. See **here** 107 for further options.

3. Save Documents

The new PDF/A file is saved. See **here** 64 for further options.

4. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.9 Convert files to PDF

 Convert files to PDF

The **Convert files to PDF** tool converts files to PDF format.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file that will be converted into PDF format. See **here** 57 for further options.

2. Convert to PDF

The new PDF file is created from the selected file. See **here** 71 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Convert Files to PDF** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new PDF file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.10 Crop Pages

 Crop Pages

The **Crop Pages** tool adjusts the visible page area, adjusts white margins and/or sets the **page boxes.** 182

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file that will be cropped. See **here** 57 for further options.

2. Crop Pages

The file is cropped according to the settings of the tool and a new file is created. See **here** 109 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Crop Pages** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.11   Extract Images from PDF

 Extract Images from PDF

The **Extract Images from PDF** searches PDF documents for raster images to extract and save to disk.

This tool uses four of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the PDF from which images will be extracted. See **here** 57 for further options.

2. Extract Images from PDF

The images are located and extracted from the file. See **here** 111 for further options.

3. Save Images

The images are saved. See **here** 66 for further options.

4. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.12 Extract Pages

Extract Pages

The **Extract Images from PDF** extracts specified page ranges from PDF documents to a new document.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files from which pages will be extracted. See **here** 57 for further options.

2. Extract Pages

The pages are extracted from the files and a new file is created. See **here** 82 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Extract Pages** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.13 Export PDF to Images

Export PDF to Images

The **Export PDF to Images** tool exports pages from PDF files to raster image formats.

This tool uses four of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files from which the pages will be exported. See **here** 57 for further options.

2. Export PDF to Images

The pages are exported and a new file is created. See **here** 85 for further options.

3. Save Documents

The new file is saved. See **here** 64 for further options.

4. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.14 Export PDF to Microsoft Powerpoint Presentation

Export PDF to Microsoft Powerpoint Presentation

The **Export PDF to Microsoft Powerpoint Presentation** tool exports pages from PDF files to Microsoft Powerpoint Presentation files.

This tool uses three of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files from which the pages will be exported. See **here** 57 for further options.

2. Export PDF to Microsoft Powerpoint Presentation

The pages are exported and a new file is created. See **here** 88 for further options.

3. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.15 Export PDF to Microsoft Word Document

Export PDF to Microsoft Word Document

The **Export PDF to Microsoft Word Document** tool exports pages from PDF files to Microsoft Word document files.

This tool uses three of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files from which the pages will be exported. See **here** 57 for further options.

2. Export PDF to Microsoft Word Document

The pages are exported and a new file is created. See **here** 91 for further options.

3. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.16   Export PDF to Plain Text

Export PDF to Plain Text

The **Export PDF to Plain Text** tool exports pages from PDF files to Plain Text files.

This tool uses three of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files from which the pages will be exported. See **here** 57 for further options.

2. Export PDF to Plaint Text

The pages are exported and a new file is created. See **here** 93 for further options.

3. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.17   OCR Pages

OCR Pages

The **OCR Pages** tool optically recognizes text characters in a PDF document and create a selectable and searchable text layer on pages. Documentation that has undergone the OCR process is much easier to search using software as a result. It also means that retyping documents can be avoided if a digital file is deleted in error.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the files upon which to perform the OCR process is carried out. See **here** 57 for further options.

2. OCR Pages

The pages undergo the OCR process and a new file is created. See **here** 112 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **OCR Pages** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.18   Optimize PDF

Optimize PDF

The **Optimize PDF** tool optimizes PDF files in order to reduce their file size and save space.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file for optimization. See **here** 57 for further options.

2. Optimize Document

The file is optimized and a new file is created. See **here** 114 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Optimize PDF** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.19 **Overlay PDF**

Overlay PDF

The **Overlay PDF** tool is used to overlay PDF files.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file for optimization. See **here** 57 for further options.

2. Overlay PDF

The overlay is inserted into the active document and a new file is created. See **here** 118 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Overlay PDF** tool to enable it. See **here** 103 for further options about the settings of this action.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.20 Rotate Pages

 Rotate Pages

The **Rotate Pages** tool rotates pages within files.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file to be rotated. See **here** 57 for further options.

2. Rotate Pages

The file is rotated and a new file is created. See **here** 127 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Rotate Pages** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.21 Resize Pages

Resize Pages

The **Resize Pages** tool adjusts the size of pages within files.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file for the resizing process. See **here** 57 for further options.

2. Resize Pages

The file is resized and a new file is created. See **here** 124 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Resize Pages** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.22 Scan to PDF

Scan to PDF

The **Scan to PDF** tool uses a local scanner to create PDF documents from paper documents.

This tool uses six of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Get Images from Scanner

The tool scans a paper document and create an image-based PDF from the scan. See **here** 60 for further options.

2. Create PDF from Images

The tool creates a single PDF from the scanned image. See **here** 72 for further options.

3. OCR Pages

This action is skipped by default. Access the Tool Actions Sequence of the **Scan to PDF** tool to enable it. See **here** 112 for further options.

4. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Scan to PDF** tool to enable it. See **here** 103 for further options.

5. Save Documents

The new file is saved. See **here** 64 for further options.

6. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.23   Set Pages Background

 Set Pages Background

The **Set Pages Background** tool inserts a solid color or a graphic background behind existing page content.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file to edit. See **here** 57 for further options.

2. Change Page Background

The background of the file is updated and a new file is created. See **here** 106 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Set Pages Background** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.24 Secure PDF

Secure PDF

The **Secure PDF** tool inserts password protection into files for protecting their viewing security and/or editing options.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file to secure. See **here** 57 for further options.

2. Secure Document

A password is created and a new file is created. See **here** 138 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Secure PDF** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.25 Split/Merge PDFs

 Split/Merge PDFs

The **Split/Merge PDFs** tool combines all input files into a single file or splits single files into new PDF files.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file to split/merge. See **here** 57 for further options.

2. Split/Merge Documents

The documents are split/merged and a new file is created. See **here** 129 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Split/Merge PDFs** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

5.26 Timestamp PDFs

Timestamp PDFs

The **Timestamp PDFs** tool inserts a timestamp from an authorized server into documents. This is done to establish the exact contents of the PDF file when the stamp is inserted and is useful for time-sensitive documents.

This tool uses five of the actions from the actions library. The order that they are performed in the Tool Actions Sequence is as follows:

1. Ask for Source Files

The tool prompts the user to select the file into which the timestamp will be inserted. See **here** 57 for further options.

2. Timestamp PDFs

The timestamp is added and a new file is created. See **here** 134 for further options.

3. Change Document Properties

This action is skipped by default. Access the Tool Actions Sequence of the **Timestamp PDFs** tool to enable it. See **here** 103 for further options.

4. Save Documents

The new file is saved. See **here** 64 for further options.

5. Show Files

The new file is displayed to the user. See **here** 69 for further options.

Double-click the tool in the Tool Info Pane to launch it. Right click on the tool to edit the the tool options/clone the tool for more advanced customization.

6   Appendix

Appendix

The following chapters detail additional information relating to the settings and functions within **PDF-Tools.** They are outlined below:

- **Available File Filters** |173| - further information about file filters and what they mean.
- **Command Line Options** |176| - a list of the available command line options that can be used in conjunction with **PDF-Tools.**
- **Create Shortcut on Desktop** |180| - a feature that enables the creation of shortcuts for tools.
- **Crop Margins** |182| - a detailed explanation relating to the cropping of margins, including definitions of the various box features involved.
- **Export Selected Tools** |184| - a feature that enables the exporting of tools.
- **Font Parameters** |186| - details relating to font parameters.
- **Macros** |188| - an explanation of what macros are and how they are used.
- **Ordering Actions in the Tool Actions Sequence** |190| - the necessary prerequisites and postrequisites for actions to run in the Tool Actions Sequence.
- **Pages Range** |191| - further details and options that relate to page ranges.
- **Paper Sizes** |192| - further details and options that relate to paper size.
- **Scanner Settings** |193| - options that relate to scanner settings.
- **Show Setup Dialog While Running** |197| - an explanation of this option within tools.

6.1 Available File Filters

Available File Filters

The Available File Filters determine the file formats that are available when a user selects files within **PDF-Tools.** The file format boxes selected in **(figure 1)** determine the file formats that are available for selection during the operation of tools.
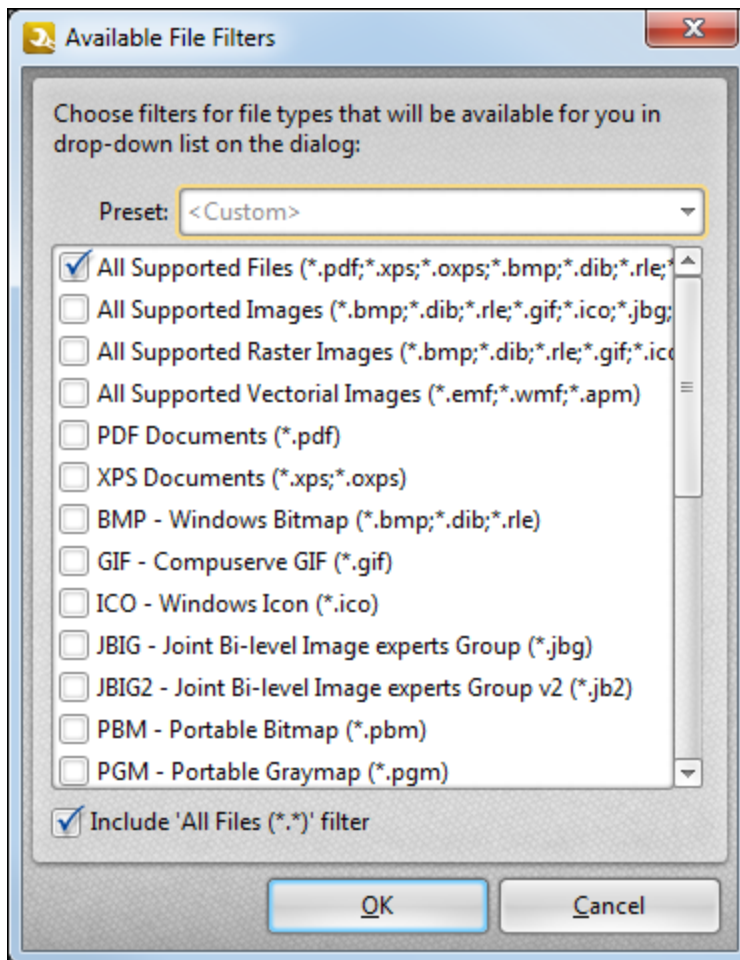
Figure 1. Available File Filters

- **All Supported Files** supports all compatible file formats.
- **All Supported Images** supports all compatible raster and vectorial image formats.

- **All Supported Raster Images** supports all compatible raster images.
- **All Supported Vectorial Images** supports all compatible vectorial images.

The four modes above are also the preset modes. These can be selected using either the relevant check boxes or the Preset menu.

Please note that there is an important difference between raster and vectorial images. Raster images are composed of pixels, whereas vectorial images are composed of mathematical paths. Raster images do not retain their appearance as size increases but vectorial images do. However, raster images are much better suited to editing, especially regarding the color. They also display finer nuances such as light to a better quality. It is important to take these things into consideration when selecting the file filter for images.

- **PDF Documents** are documents in the Portable Document Format, which is used to present documents in a manner independent of application software, hardware and operating systems.
- **XPS Documents** are documents saved in the **(*.xps)** and **(*.oxps)** paper specification formats.
- **BMP** files are files used to store bitmap digital images.
- **GIF** files are raster graphic files that are usually animated.
- **ICO** files are image files formatted for computer icons in Microsoft Windows.
- **JBIG** is a lossless image-compression standard that is the most common format for use with fax machines.
- **JBIG2** is an image-compression standard for bi-level images that is suited for lossless and lossy compression.
- **PBM** is a portable bitmap image format that is designed to be exchanged easily between platforms.
- **PGM** is identical to the PBM format but is used for grayscale images.
- **PPM** is identical to the PBM format but is used for pixmap images.
- **TGA** is a raster graphics file format created by Truevision Inc.
- **PCX** is an image file format developed by ZSoft Corporation. It is the native file format for PC Paintbrush.
- **DCX** is a file extension for a bitmap/raster graphics file format used by Multipage PCX. DCX files derive from PCX files.
- **PNG** format, or Portable Network Graphics, is a raster graphics file format that supports lossess data compression.
- **JPEG** format, or Joint Photographic Experts Group, is used for photographs and other image files where the file size is necessarily small, such as in websites and emails.
- **JPEG 2000** format is an image compression standard and coding system with several improvements from the original JPEG format.
- **TIFF,** or Tag Image File Format, is a common format for exchanging raster graphics between application programs, including those that use scanners.
- **Metafiles (*.emf;*.wmf;*.apm)** are stored in a format that can be exchanged between different systems or software.

- **Rich Text Format (*.rtf)** is a proprietary document file format with published specification developed by Microsoft.
- **MS Word Document** formats are intended for use with documents created with Microsoft Word.
- **MS Excel Spreadsheet** formats are intended for use with documents created with Microsoft Excel.
- **MS Power Point Presentation** formats are intended for use with documents created with Microsoft Power Point.
- **MS Visio Drawing** formats are intended for use with documents created using Microsoft Visio.
- **Plain Text** format displays the data in files that represents only the characters of readable material.

Select the boxes of the desired formats. Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the **Available File Filters** dialog box.

6.2 Command Line Options

Command Line Options

The command line options listed below are available for **PDF-Tools.** Please note:

- If any values have spaces, backslahses or forwardslashes then the entire options list should be enclosed in quotation marks.
- If the **optionslistfile** contain spaces, it should be enclosed in quotation marks.
- If a profile is specified, changes will be made to that profile. If not then the changes will apply to the current printer's settings.
- These options are for the **PDFXTools.exe** executable, the default location of which is:

    ```
    "C:\Program Files\Tracker Software\PDF Tools V6\PDFXTools.exe"
    ```

- Unless the path to **PDFXTools.exe** is added to the system %path% variable, the full path to **PDFXTools.exe** must be specified.

FORMAL SYNTAX	
SYNTAX	**DEFINITION**
<anytext>	Any text string.
<a>|<b>	**<a>** or **<b>**
<filename>	The full or relative path to file. When the path contains white spaces it should be enclosed in double quotation marks. For example: "c:\My Documents\My Test Document.pdf"

[expression]	The specified expression is the optional part of command line. For example if the syntax is: **/RunTool[:showui=yes|no] [;showprog=yes|no][;showrep=yes|no] <ToolID> [<filename1> [<filename2> ... <filenameN>]]** then the following is correct: **/RunTool imagesToPDF** **/RunTool imagesToPDF "c:\picture1.png" "c:\picture2.png"** **/RunTool:showprog=no imagesToPDF "c:\picture1.png" "c:\picture2.png"**
	COMMAND LINE OPTIONS

NAME	PARAMETERS	SYNTAX	DEFINITION
/RunTool	• **showui** - if the yes value is specified then the main window will be displayed. The default value is no. • **showprog** - if the yes value is specified then the progress bar will be displayed. The default value is yes. Please note that when showui=yes is specified then showprog=no will be ignored. • **showrep** - if the yes value is specified then the application will display a special report	/RunTool[:showui=yes|no] [;showprog=yes|no] [;showrep=yes|no] <ToolID> [<filename1> [<filename2> ... <filenameN>]]	This command runs the tool specified. For example: **PDFXTools.exe /RunTool imagesToPDF** **PDFXTools.exe /RunTool imagesToPDF "c:\picture1.png" "c:\picture2.png"** **PDFXTools.exe /RunTool:showprog=no;showrep=no imagesToPDF "c:\picture1.png" "c:\picture2.png"** **PDFXTools.exe /RunTool:showprog=no;showrep=no imagesToPDF "c:\FolderWithPictures"**

	window when errors occur during the operation of tools. The default value is yes. • **<ToolID>** - the required parameter is the string that contains the unique name of tool to be executed. Identifiers of all existing tools can be viewed using the **/DumpTools** command detailed below. • **<filename1> ... <filenameN>** – is an optional list of input files that the specified tool will process. It is also possible to specify folders, in which case the tool will process all corresponding files recursively.		
/ImportSettings	• **<filename>** - is the path to the file that contains program settings. It can be created using the **/ExportSettings** or **/ExportTools** commands (or the	**ImportSettings <filename>**	This command imports program settings from the specified file. For example: **PDFXTools.exe /ImportSettings "c:\PDF-Tools_AppSettings.pdts"** **PDFXTools.exe /ImportSettings "c:\PDF-Tools_Exchange.pdtex"**

	corresponding features in User Interface).		
/ExportSettings	• **<filename>** - is the path to the file in which all program settings will be stored.	**/ExportSettings <filename>**	This command exports all program settings to a specified file. For example: **PDFXTools.exe /ExportSettings "c:\PDF-Tools_AppSettings.pdts"**
/ResetSettings	N/A	**/ResetSettings**	This command restores all program settings to their default state. For example: **PDFXTools.exe /ResetSettings**
/ExportTools	• **<filename>** - is the path to file in which all existing tools will be stored.	**/ExportTools <filename>**	This command exports all existing tools and their options to a specified file. For example: **PDFXTools.exe /ExportTools "c:\PDF-Tools_Exchange.pdtex"**
/DumpTools	• **<filename>** - is the path to the text file in which identifiers of all existing tools will be stored.	**/DumpTools <filename>**	This command saves identifiers of all existing tools to plain text file. For example: **PDFXTools.exe /DumpTools "c:\PDF-Tools.txt"**

6.3 Create Shortcut on Desktop

Create Shortcut on Desktop

Standard Tools and Custom Tools feature additional settings. Right click on tools to access these settings. The following options will be displayed:
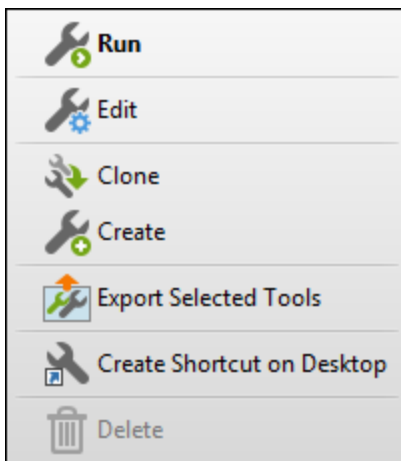
Figure 1. Tool Options

Run launches the selected tool.

Edit launches the Edit Tools window for the selected tool.

Clone creates a clone of the selected tool for further customization. See here 41 for further information.

Create launches the Edit Tools window to create a new tool. See here 46 for further information.

Export Selected Tools is explained here. 184

Create Shortcut on Desktop is explained below.

Create Shortcut on Desktop

This setting is used to create convenient shortcuts to tools. Click it to create a shortcut for the selected tool. Alternatively, select and drag the tool from the tools window into the desktop area. The shortcut will appear on the desktop. It will feature a **PDF-Tools** icon and the name of the selected tool. Click the icon to launch and operate the tool independently of the application. It is also possible to specify individual files and/or folders when creating the shortcut for individual tools:

- When the shortcut has been selected, right-click on the desktop icon and select **Properties.** The **Target** option will be selected.
- Files or folders can be added at the end of the path in the target option in order to launch them automatically in conjunction with the tool shortcut. The most efficient method to do this is as follows:
- Select the desired file/folder.
- Press and hold **SHIFT.**
- Right click.
- Select **Copy as Path** from the menu.
- Paste the details at the end of the **Target** path detailed above.

The associated files/folder will then launch in conjunction with the tool shortcut.

6.4   Crop Margins

Crop Margins

PDF documents feature up to five boxes that determine their content and appearance. They are the Media Box, Crop Box, Bleed Box, Trim Box and Art Box. **PDF-Tools** uses four of these boxes to determine customizable settings:

Crop Box

The Crop Box defines the region to which page contents are clipped when displayed or printed. Programs use the dimensions of this box for screen display and printing. Unlike the other boxes, the Crop Box has no defined meaning in terms of physical page geometry or intended use - it merely imposes clipping on page contents. However, in the absence of additional information (such as imposition instructions specified in a JDF or PJTF job ticket) the Crop Box determines how the page contents will be positioned on the output medium.

Bleed Box

The Bleed Box defines the region to which the contents of the page shall be clipped when output in a production environment. This may include the "bleed area" needed to accommodate the physical limitations of cutting, folding and trimming equipment. Usually the Bleed Box is three to five millimeters larger than the Trim Box. When a page is printed it may include printing marks that fall outside the bleed box. The default value for the bleed box the page's crop box.

Trim Box

The Trim Box defines the intended dimensions of the finished page after trimming has taken place. As opposed to the Crop Box, the Trim Box is very important because it defines the actual page size. Programs use the Trim Box as the basis for positioning pages on a press sheet. The default value for the Trim Box is the same as that of the Crop Box.

Art Box

The Art Box defines the extent of the page's meaningful content (including potential white space) as intended by the page's creator. I.e. it defines regions that are of special interest. Programs do not generally use the Art Box. The default value for the Art Box is the same as that of the Crop Box.

6.5 Export Selected Tools

Export Selected Tools

Standard Tools and Custom Tools feature additional settings. Right click on tools to access these settings. The following options will be displayed:
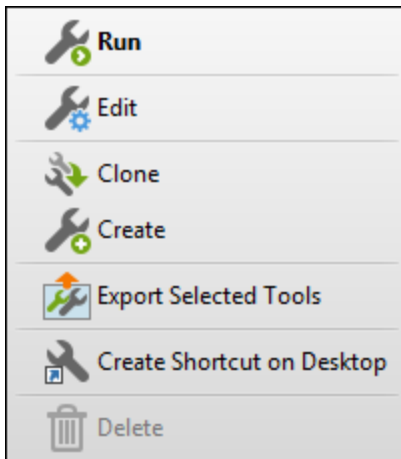
Figure 1. Tool Options

Run launches the selected tool.

Edit launches the Edit Tools window for the selected tool.

Clone creates a clone of the selected tool for further customization. See here 41 for further information.

Create launches the Edit Tools window to create a new tool. See here 46 for further information.

Export Selected Tools is explained below.

Create Shortcut on Desktop is explained here. 180

Export Selected Tools

This options is used to export tools from **PDF-Tools.** When it is selected the **Save Export File** dialog box will open. Enter a name for the exported tool and select the location at which it will be saved. It must be saved as a **.pdtex** file. Click **Save** to save the exported tool. Click **Cancel** to cancel the process and close the dialog box.

6.6   Font Parameters

Font Parameters

There are several actions in **PDF-Tools** that feature options for their associated fonts. Those options are explained below:
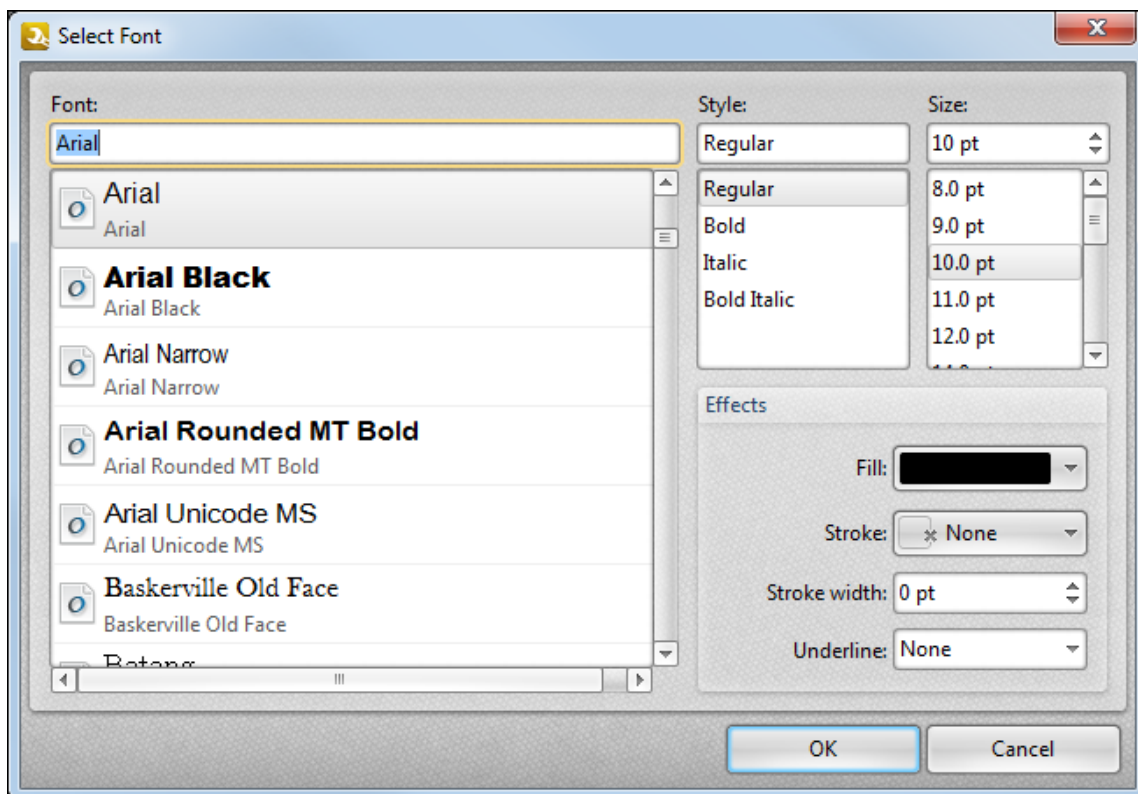
Figure 1. Select Font Options

- The **Font** text box can be used to search for fonts. Enter the font name in the text box. If it is available then it will appear in the font window. Click it to select it.
- Fonts feature varied settings for style. When a font is selected, use the **Style** option to select a style.
- Use the **Size** option to select a size for the font.
- Use the **Fill** option to select a color for the font.
- Use the **Stroke** option to select an outline color for the font (Please note that the stroke color may obscure the font color at smaller sizes).

- Use the **Underline** option to underline text.

When the desired settings have been selected, click **OK** to save the settings and close the **Select Font** dialog box. Click **Cancel** to revert to previous settings and close the dialog box.

6.7 Macros

Macros

Macros are used in several of the tools and actions within **PDF-Tools.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to a corresponding output sequence. This means that complicated components of the output process can be reduced in the input process, making the work involved both less intensive and less error-prone.

The macros available in **PDF-Tools** are used when saving files. They are added in square brackets after the file name that the user enters. All macros are detailed below. Unless otherwise specified, macros add the same details as the macro name to the file name:

- **Document Title**
- **Document Index**
- **Document Info,** which has the further options**:**

  - **Title**
  - **Author**
  - **Subject**
  - **Keywords**
  - **Creator**
  - **Producer**
  - **Creation Date**
  - **Modification Date**

- **Page Number**
- **Number of Pages**
- **File Name**
- **Date**
- **Year**
- **Month**
- **Day**
- **Time**
- **Hour**

- **Minute**
- **Seconds**
- **Computer Name**
- **User Name**
- **Environment Variable,** which has multiple options relating to the **environment variables** of the file.
- **Auto Number**
- **Application Version**

See **here** for a technical explanation of how macros function.

6.8   Ordering Actions in the Tool Actions Sequence

Ordering Actions in the Tool Actions Sequence

The order in which actions from the actions library are listed in the Tool Actions Sequence is essential for the correct functioning of the tool. The order of actions in **Standard Tools** [141] is fixed, but it is variable when tools are cloned or created from scratch. Almost all actions have either prerequisites or postrequisites. I.e. certain other actions must be sequenced either before or after the given action for it to operate. If these actions are not included then the warning icon will display and the tool will not run. The prerequisites and postrequisites are detailed below:

Ask for Source Files is the only action that has neither prerequisites or postrequisites.
Get Images from Scanner does not have prerequisites, as it is always located at the beginning of the sequence. It has the postrequisite **Save Images** or **Save Documents.**

Save Documents, Save Images and **Show Files** have the prerequisites **Ask for Source Files** or **Get Images from Scanner.**
Export PDF to Images and **Extract Images from PDF** have the prerequisites **Ask for Source Files** or **Get Images from Scanner** and the postrequisites **Save Documents** or **Save Images.**

Export PDF to Microsoft PowerPoint Presentation, Export PDF to Microsoft Word Document and **Export PDF to Plain Text** have the prerequisites **Ask for Source Files** or **Get Images from Scanner.**

All other actions have the prerequisite **Ask for Source Files** or **Get Images from Scanner** and the postrequisite **Save Documents.**

6.9 Pages Range

Pages Range

There are several actions in the Actions Library and Standard Tools that feature **Pages Range** options. When this option is available the following dialog box is displayed:
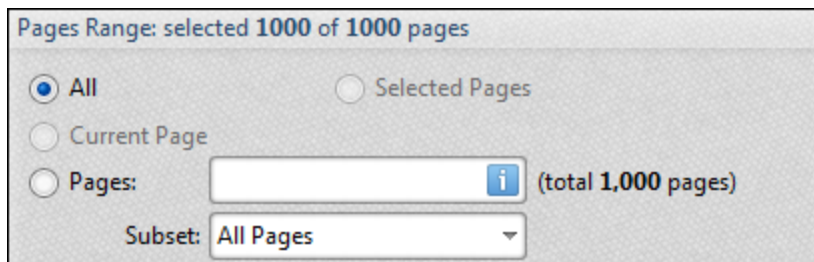
Figure 1. Page Range Options

- Select the **All** option button in include all pages of the document in question.
- The **Current Page** and **Selected Pages** options are not available. These options will be removed in a future update.
- Select the **Pages** option button to select specified pages. Individual pages must be separated with a comma. Alternatively, enter page ranges separated with a dash.
- Use the **Subset** menu to select subsets as desired. The options are **All Pages, Odd Pages Only** and **Even Pages Only.**

6.10 Paper Sizes

Paper Sizes

There are two actions in the actions library and two Standard Tools that feature an option for **Paper Sizes.** These relate to the options when using a scanner. When these options are available the following dialog box is displayed:

Figure 1. Paper Size Options

- Select **Automatic** to allow the local scanner to select the paper size itself.
- Select **Standard** to select a standard paper size, such as those used by the **ICO** and **ANSI**.
- Select **Custom** to enter custom dimensions for the height and width of the paper size. Use the measurements option box to select the desired measurement.

The **Create PDF from Images** action/tool has a further option for the **Orientation** and **Page Rotation** of the document. Select **Portrait** or **Landscape** for the orientation. The rotation options are self-explanatory.

6.11 Scanner Settings

Scanner Settings

There are several actions and Standard Tools in **PDF Tools** that feature options when scanning. There are two dialog boxes that relate to these options:

Scan Properties
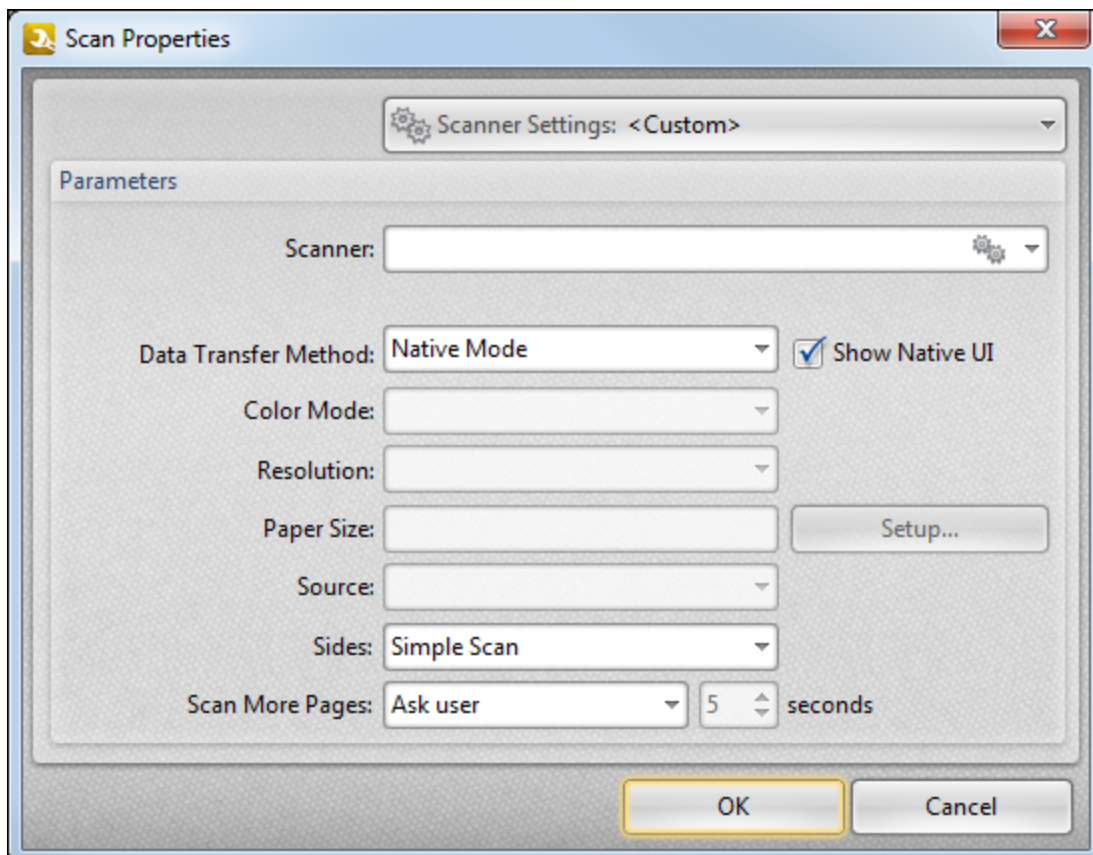
Figure 1. Scan Properties Dialog Box

- Click the **Scanner Settings** menu to open the menu shown in *(figure 2)* below.
- Click the **Scanner** menu to select the scanner that the tool will use.

- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode.**
- Click the **Sides** menu to choose the side(s) of the document(s) scanned. There are three options: **Simple Scan, Manual Duplex** and **Manual Duplex Reversed.** Click the arrow for an explanation of these options.
- Click the **Scan More Pages** menu to determine the setting for when further pages are scanned.
- The **Show Native UI** box is selected by default, which means the scanner selects certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the box to customize those parameters:
- **Color Mode** has three options: **Color, Grayscale** and **Black & White**. These refer to the format of scanned documents.
- Click the **Resolution** menu to select the **dpi** (dots per inch) of scanned documents.
- **Paper Size** refers to the size of the paper used when scanning. Click **Setup** for further options. These are: **Automatic, Standard** and **Custom.** Click **Automatic** to use the scanner's default setting. Click **Standard** to select from a menu of standard **ISO** and **ANSI** sizes. Click **Custom** to enter custom dimensions. Click **Orientation** to toggle between **Portrait** and **Landscape**.
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner being used.

Click **OK** to save changes and return to the Edit Tools window. Click **Cancel** to revert to previous settings.

Then, in the Edit Tools window:

- Click ![save icon] **Save Changes** to save new settings.
- Click ![close icon] **Close Edit** to end the current edit and revert to previous settings.

Scanner Settings

Click the **Scanner Settings** menu to save custom settings for later use. This opens *(figure 2)* below.
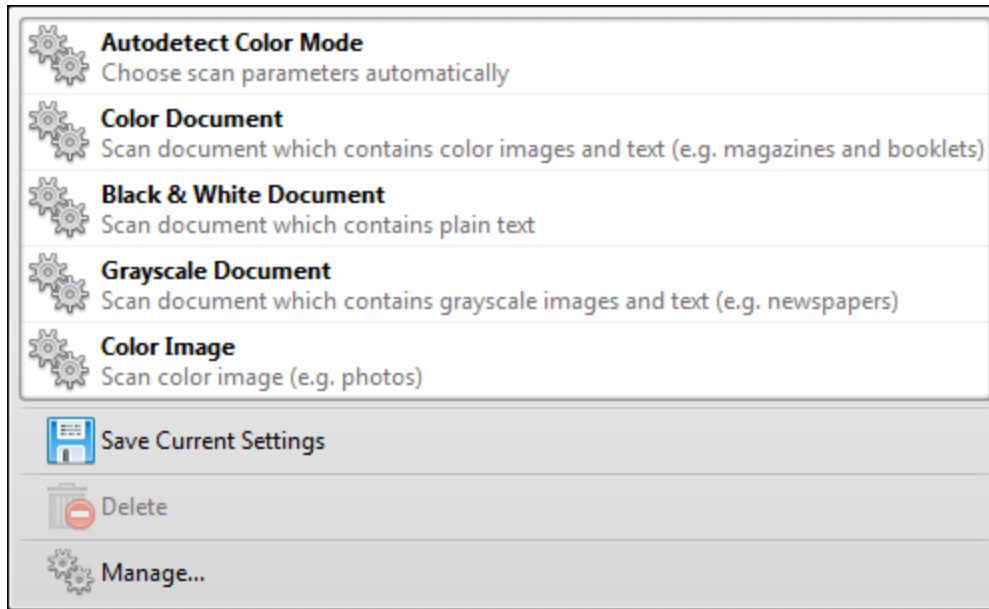
Figure 2. Scanner Settings Menu Options

This menu is used to adjust the scanner mode or save custom settings. There are five preset modes that relate to the format of scanned document(s):

- **Autodetect Color Mode**
- **Color Document**
- **Black & White Document**
- **Grayscale Document**
- **Color Image**

Details of when these should be used are provided in *(figure 2)*. They feature settings that are optimal for their respective modes.

- Click **Save Current Settings** to name (and give a brief description, if desired, to) customized settings.

- Click **Delete** to delete the custom preset mode currently selected.

- Click **Manage** to manage custom preset modes. The five preset modes cannot be changed but they can be cloned and then edited.

6.12   Settings Synchronization

Settings Synchronization

Another new feature of **PDF Tools** is **Settings Synchronization.** This is a useful feature for users that have more than one copy of **PDF Tools** on their computer. When two or more copies are open on the same computer any changes made in one copy will be updated automatically in other copies. This feature is automatic and cannot be disabled.

6.13   Show Setup Dialog While Running

Show Setup Dialog While Running

This option is a common parameter in **PDF-Tools** and is featured in almost all of the library actions. It is displayed as a check box that should be selected if the user want to view the setup dialog when the tool runs. The setup dialog is the dialog box of the action in question and the various settings that it features. These determine the customizable options of actions. Selecting the **Show Setup Dialog While Running** box means that the setup dialog is displayed when the tool runs. This facilitates the editing of settings during a single run of a tool without saving the settings. It is convenient if the user is performing a single run that is different from a standard run, or if they want to convert multiple documents with different settings. Similarly, if the settings do not need to be adjusted, it makes the process of using tools faster if the check box is cleared.

7 **PDF-XChange Editor V6 User Manual**

PDF-XChange Editor V6 User Manual

PDF-XChange Editor is one one of the fastest and most feature-rich options available worldwide to view, edit, modify and OCR image-based PDF files.

Use the **Table of Contents** on the left to browse the topics of this manual. Click topics to expand them.

Click the icons above the chapter headings to search the following:

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Keyword Index

Search Topics

7.1   PDF Editor Main Window

PDF Editor Main Window

The main window in **PDF-XChange Editor** is where the majority of functions within the software are located. It appears as below:
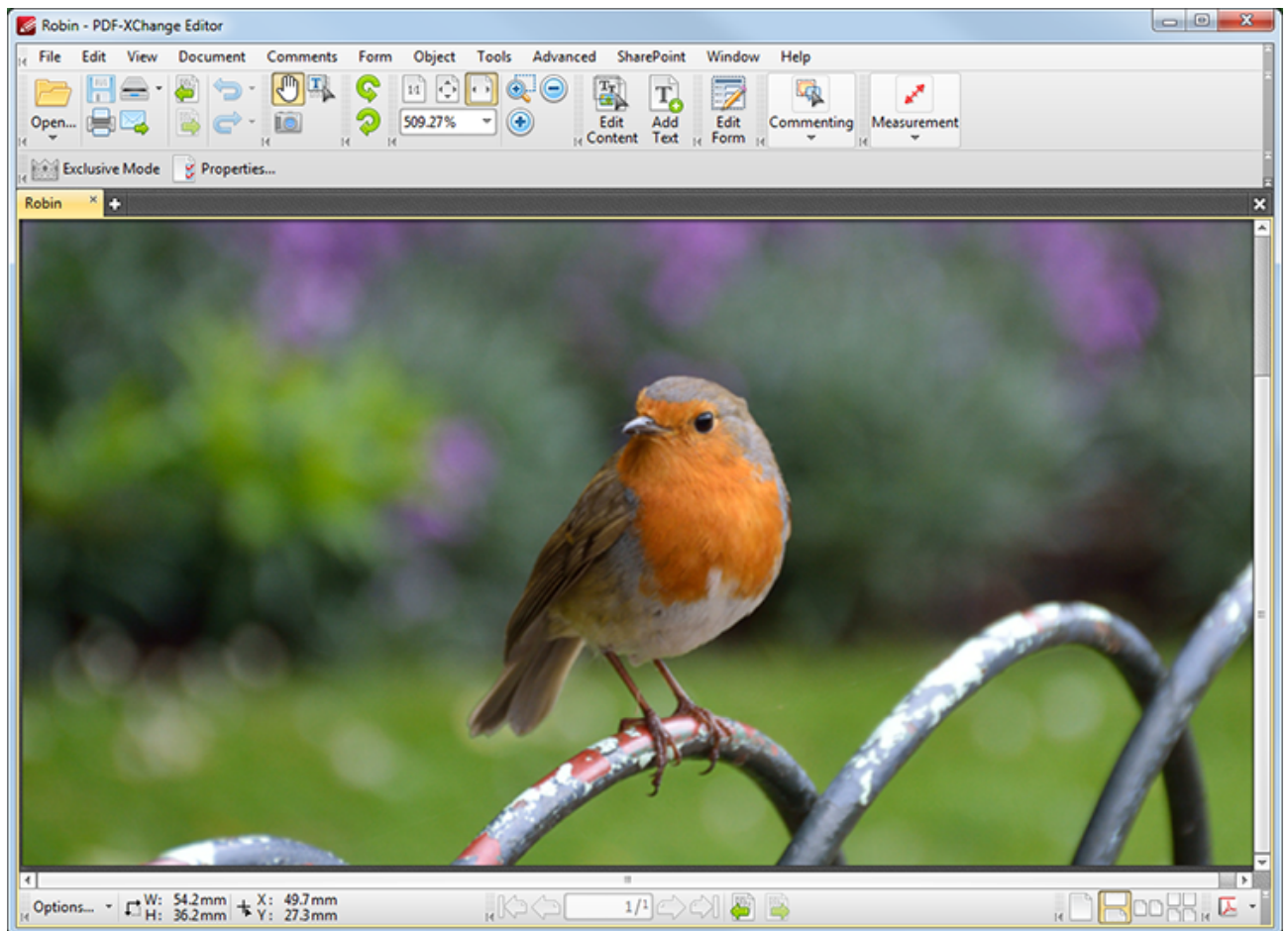
Figure 1. PDF X-Change Editor Main Window

Menu Bar

The menu bar is located at the top of the window. It is divided into twelve tabs, each of which have further options. Click the links to view their details:

- **File** 201
- **Edit** 253
- **View** 327
- **Document** 414
- **Comments** 473
- **Form** 485
- **Object** 490
- **Tools** 492
- **Advanced** 528
- **SharePoint** 557
- **Window** 558
- **Help** 560

Toolbars

The remaining toolbars visible in the main window and their associated icons and functionality are explained in the toolbars sections of the **View** tab, which is available here. 329

7.2   File

File

When the **File** tab is selected, the following options are available:
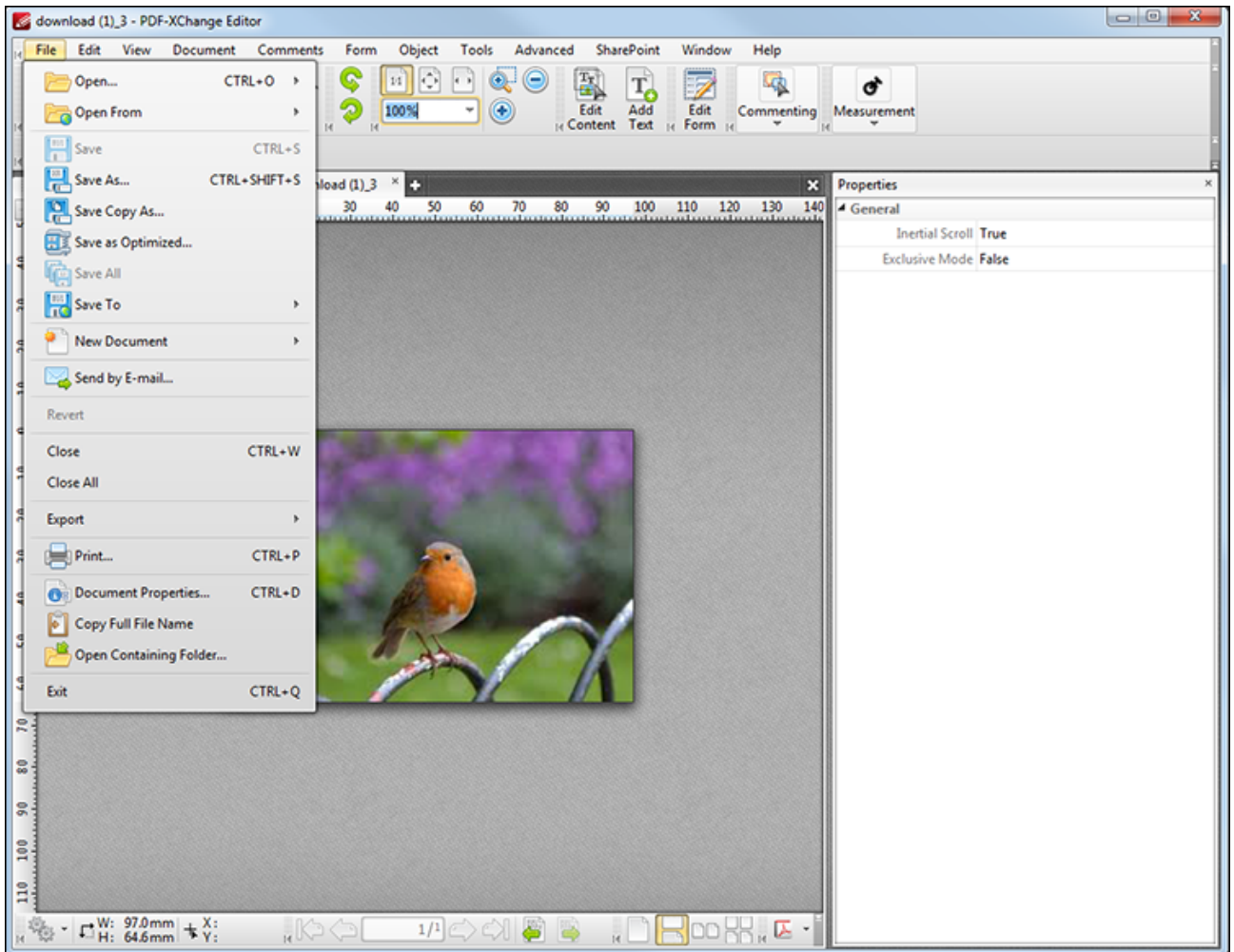
Figure 1. File Tab Menu

Click the links below to access the associated sections of the manual:

- **Open/Open From** 203

Open/Open From

Open/Open From

Open

These options are used to open files in **PDF-XChange Editor.** Hover the pointer over the **Open** icon/text to view a list of recent documents. These are divided into **Pinned Recents** and **Unpinned Recents:**
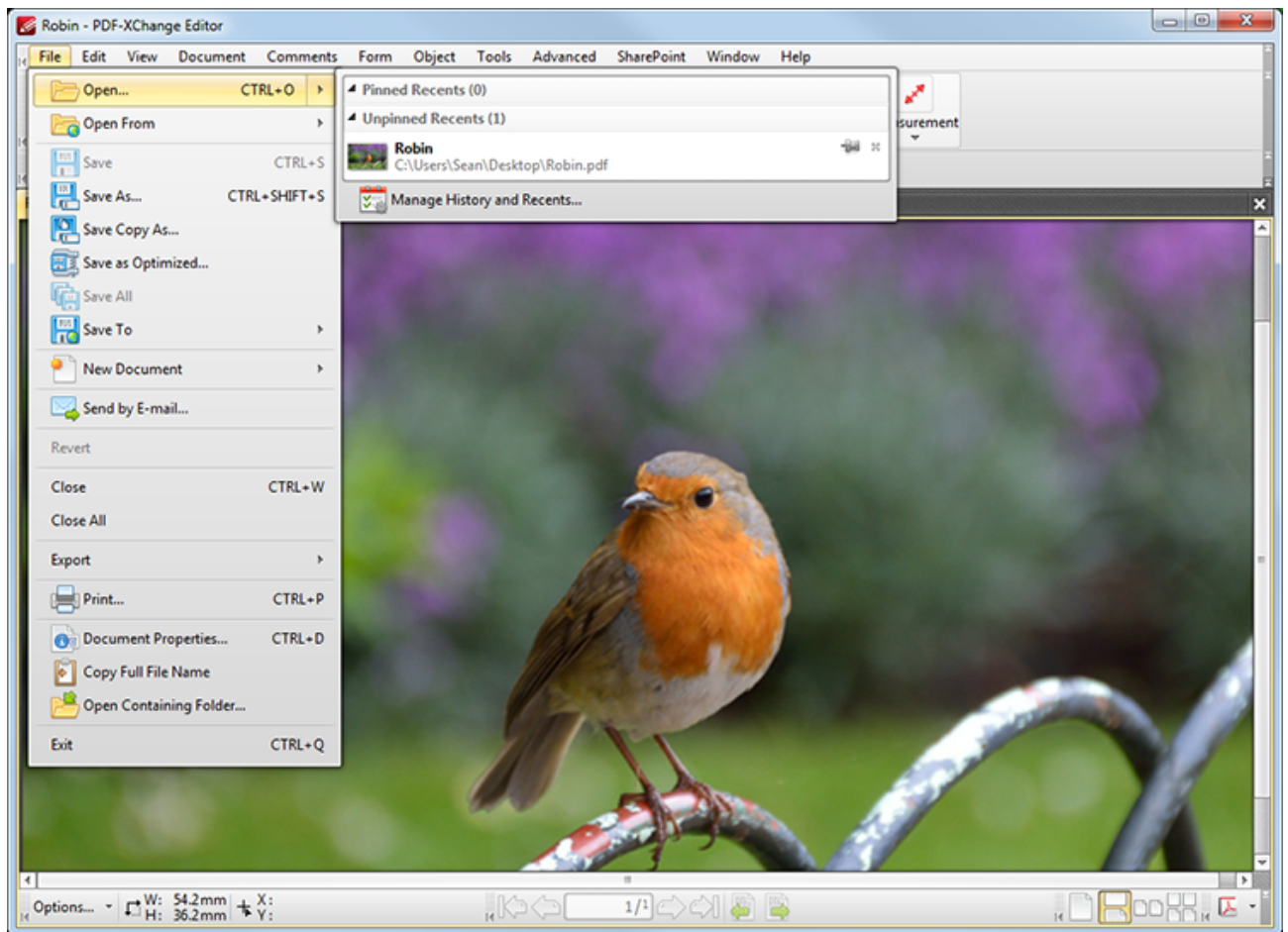
Figure 1. PDF X-Change Editor Main Window. File Tab Options

- All documents viewed previously in **PDF-XChange Editor** are detailed chronologically in the **Unpinned Recents** list.
- The pin feature is included so documents that the user considers more important are not moved down in the list when new documents are viewed. They will remain in the **Pinned Recents** list instead.
- Click the pin icon next to unpinned documents in order to add documents to the list of **Pinned Recents.**
- Click the pin icon next to **Pinned Recents** in order to remove documents from the list. Click documents from either list in order to open them.
- Hover the pointer over documents to view document properties. Alternatively, click the **Open** text/icon to select a file from the local computer.
- Files from the local computer can also be selected using the **Open From** option. This option should also be used to select files from a website URL, SharePoint server or Google Drive. Follow the on-screen instructions for these options.
- Click **Manage History and Recents** to view/edit the **History** and **Recent List Options.**

Open From

When the pointer is hovered over this option, the following features area available:
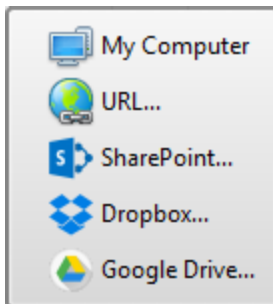
Figure 2. Open From Options

- Click **My Computer** to open a file from the local computer.
- Click **URL** to open a file that is saved on the internet. The **Open a Web Link** dialog box will open. Enter the URL of the required file and click **OK** to open it.
- Click **SharePoint** to open a file directly from a SharePoint location. The **Open File** dialog box will open. Enter the SharePoint URL and click the **Navigate** button. Follow the on-screen instructions to open the required file.
- Click **Dropbox** to open a file from a **Dropbox** folder. The **Authenticate** dialog box will open. Enter the login details of the required Dropbox account and select the required file.
- Click **Google Drive** to open a file from a Google Drive location. Follow the on-screen instructions to open the required file.

Save Options

Save Options

These options are used to save documents in **PDF-XChange Editor.** They are enabled when the active document has been modified. The following options are available:

- Click **Save** to save the active document. Any changes made since the document was opened will be saved and the original version of the document will be overwritten.
- Click **Save As** to save the edited document with a new name and retain the original version. Use the **Save as type** menu to determine the format of the saved file. When a format is selected, click the **Options** button beneath the **Save as Type** menu to determine format-specific options.
- Click **Save Copy As** to save a copy of the document with its current changes. The **Save File As** dialog box will launch when this option is selected. The file name will be entered automatically in the **File Name** text box with the word 'Copy' added afterwards.
- Click **Save All** to save all open documents.
- Click **Save To** to save documents directly to Sharepoint, Dropbox or Google Drive.
- Click **Save as Optimized** to optimize files before they are saved. When this option is selected the **Optimize PDF** dialog box opens:
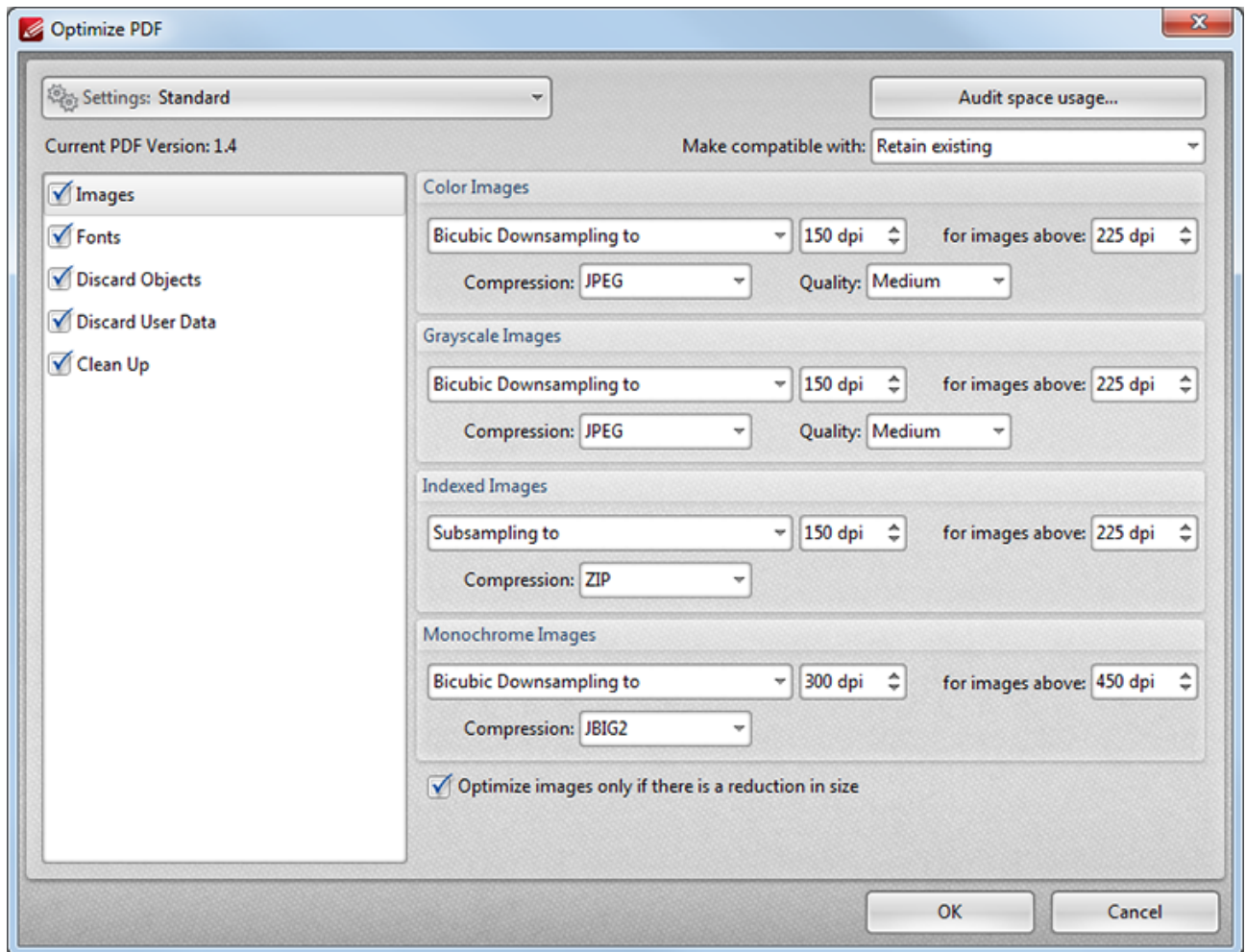
Figure 1. Optimize PDF Dialog Box

- Use the **Settings** menu to toggle between **Standard Mode,** which is best for computers, and **Mobile mode,** which is best for tablets and cell phones. When custom details have been entered into the variable parameters of the **Optimize PDF** dialog box they can be saved for subsequent use. Click the **Settings** menu and select **Save Current Settings.** Enter a name and short description for the settings. Click **OK** to save the settings. Click **Cancel** to cancel the process and close the dialog box. Use the **Manage** option of the **Settings** menu to **Edit, Delete** or **Clone** custom settings.
- Click the **Audit Space Usage** button to view a breakdown of the space within the active file.
- Use the **Make compatible with** menu to select the version of Acrobat with which to make the current document compatible.
- Select the desired boxes from the choices on the left: **Images, Fonts, Discard Objects, Discard User Data** and **Clean Up.** Selected options will be included in the optimization process. Each option has further settings as detailed below:

Images

- Click the **Color Images, Grayscale Images, Indexed Images** and **Monochrome Images** menus to select settings for the respective image formats.
- Click the **Bicubic Downsampling/Subsampling** menus to increase/reduce the resolution of images.
- Click the arrows in the **dpi** box, or enter a figure manually, to select the dots-per-inch resolution for new images.
- Click the arrows in the **for images above** box, or enter a figure manually, to select the minimum **dpi** at which images are downsampled/subsampled.
- Click the **Compression** menus to select the compression format of images. Where applicable click the **Quality** menu to select the compression quality.
- **Optimize images only if there is a reduction in size** is selected by default. Clear this box to optimize images even when there is no reduction in size.

Fonts

- Use the menu to select a setting for font unembedding. The following options are available:
  - **Do Not Unembed any font** means that all fonts will remain embedded.
  - **Unembed recommended fonts** means that common fonts will be unembedded. (This is carried out in order to reduce the file size. Unembedding common fonts is less likely to be problematic as they are contained within most software and therefore it is not necessary for subsequent users to have them embedded).
  - **Unembed All Fonts** means that all fonts will be unembedded. This reduces the file size as far as possible with regard to fonts but also increases the risk of subsequent issues.
  - **Select fonts to unembed manually** allows the user to determine the fonts that are unembedded. When this option is selected the fonts used within the active document are displayed in the **Embedded Fonts** pane. Select fonts and click the **Unembed** button to unembed them when the file is optimized. Select fonts within the **Fonts to Unembed** pane and click **Retain** to retain them when the file is optimized.
- Select the **Merge fonts subsets** box save additional space where possible.

Discard Objects

- Select the **Discard all form submissions, import and reset actions** box to remove these elements from the document.
- Select the **Discard all JavaScript actions** box to remove JavaScript from the document.
- Select the **Discard all alternate images** box to remove instances of alternate images from the document.
- Select the **Discard embedded page thumbnails** box to remove embedded custom page thumbnails from the document.
- Select the **Detect and merge image fragments** box to merge image fragments. (Some images are composed of fragmented sections that are spliced together. Selecting this option can significantly reduce the file size).

- Select the **Discard embedded print settings** box to discard left-over encoding from when the document was created with a virtual printer.
- Select the **Discard bookmarks** box to remove all bookmarks from the document.

Discard User Data

- Select the **Discard all Comments, forms and multimedia** box to remove all form fields, comments and annotations from the document.
- Select the **Discard document information and metadata** box to remove all document metadata as detailed here.²⁴³
- Select the **Discard file attachments** box to remove attached/embedded files from the document.
- Select the **Discard private data of other applications** box to remove information from the document that is useful only to the application used to create it.
- Select the **Discard hidden layer content and flatten visible layers** box to remove hidden layers from the document.

Clean Up

- Select the **Discard duplicates of Fonts** box to remove any redundant fonts from the document.
- Select the **Discard duplicates of Images** box to remove instances of duplicate images from the document.
- Select the **Discard duplicates of XForms** box to remove any instances of duplicate Xforms. (Xforms are graphical groups of objects).
- Select the **Use Flate to encode streams that are not encoded** box to compress information within documents that is pending for compression, and thereby reduce the file size.
- Select the **In Streams that use LZW encoding use Flate instead** box to use Flate compression in the place of LZW encoding. This is recommended as Flate is compatible on a wider range of platforms.
- Select the **Discard invalid bookmarks** to discard bookmarks that do not feature actions/working destinations.
- Select the **Discard unreferenced named destinations** as desired.
- Select the **Find and Remove the content outside the crop box** box to remove (as opposed to hide, which is the default setting) content outside the crop box.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the dialog box.

New Document

New Document

This option facilitates the creation of new documents. There are seven settings. Click the links below to access the associated sections of the manual:

- **With Blank Pages** 210
- **Combine Files into a Single PDF** 211
- **From Text Files** 214
- **From Markdown** 218
- **From Rich Text Format (RTF) Files** 220
- **From Image File(s)** 222
- **From Scanner** 230

With Blank Pages

With Blank Pages

This option creates a new document with blank pages. When it is selected the **New Empty Document** dialog box will open:
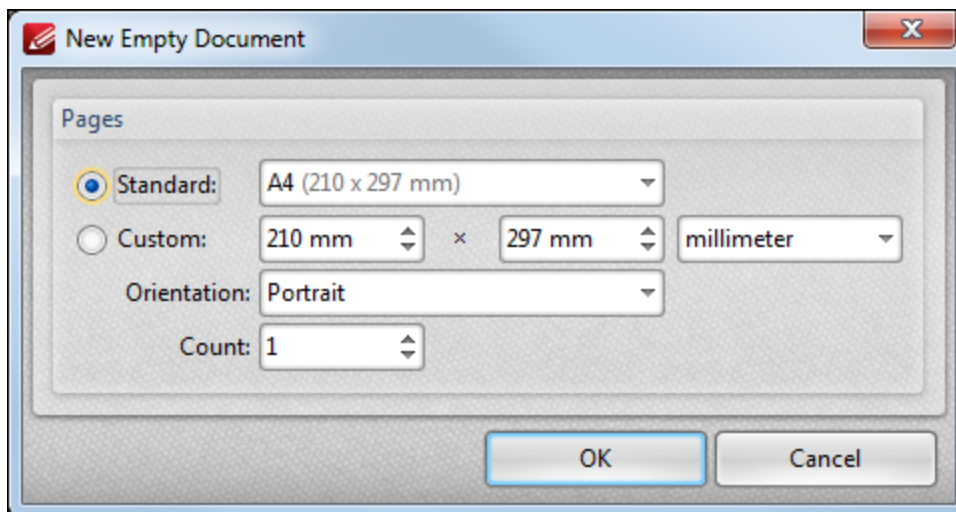
Figure 1. New Empty Document Dialog Box

- The **Standard** options are standard dimensions for documentation such as those used by the **ISO** and **ANSI.**
- The **Custom** options can be used to enter custom dimensions. Enter the desired measurements into the text boxes and select the units of measurement.
- Select either **Portrait** or **Landscape** as the orientation.
- The **Count** option determines how many blank pages are created.

When the desired settings have been selected click **OK** to launch the new document. Click **Cancel** to cancel the process and close the dialog box.

Combine Files Into A Single PDF

Combine Files Into A Single PDF

This option creates a single PDF document from several PDF documents. When it is selected the **Combine Files** dialog box will open:
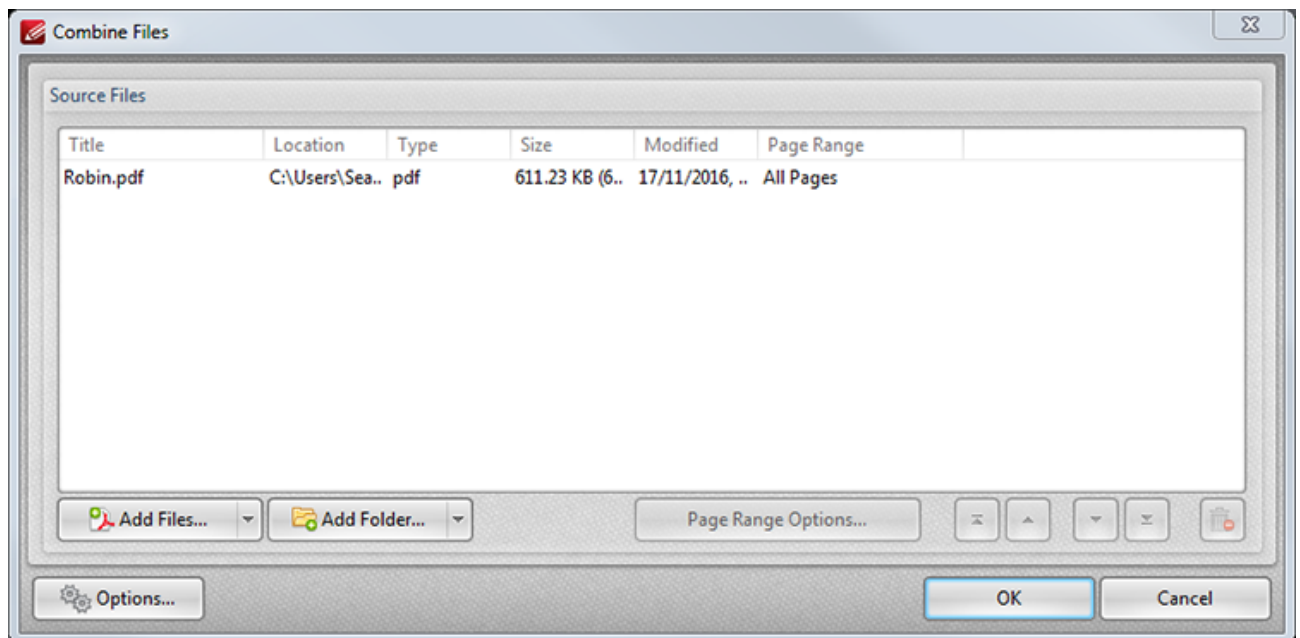
Figure 1. Combine Files Dialog Box

- Click **Add Files** to select individual files from the local computer to add to the list of source files. The **Page Range Options** button can be used to select specified pages or page ranges within documents. Select a file from the list of source files to enable this option. Individual pages must be separated by a comma. Page ranges must contain the first and last pages of the page range and be separated by a hyphen. Alternatively, use the **Subset** option to select a subset of pages from the document. Use the arrow icons next to the **Page Range Options** button to move selected documents up or down in the list of source files. This determines the order in which they appear in the new document.
- Click **Add Folder** to add entire folders to the list of source files. Click the arrow adjacent to the button to determine further options. The **Add Files From Folder Options** dialog box will open. This is detailed in *(figure 2)* below.

- Click **Options** to determine the actions taken with objects contained within combined files. The **Options** dialog box will open. The available actions relate to comments, form fields and bookmarks. Select the **Add root bookmark with file name** box as desired.
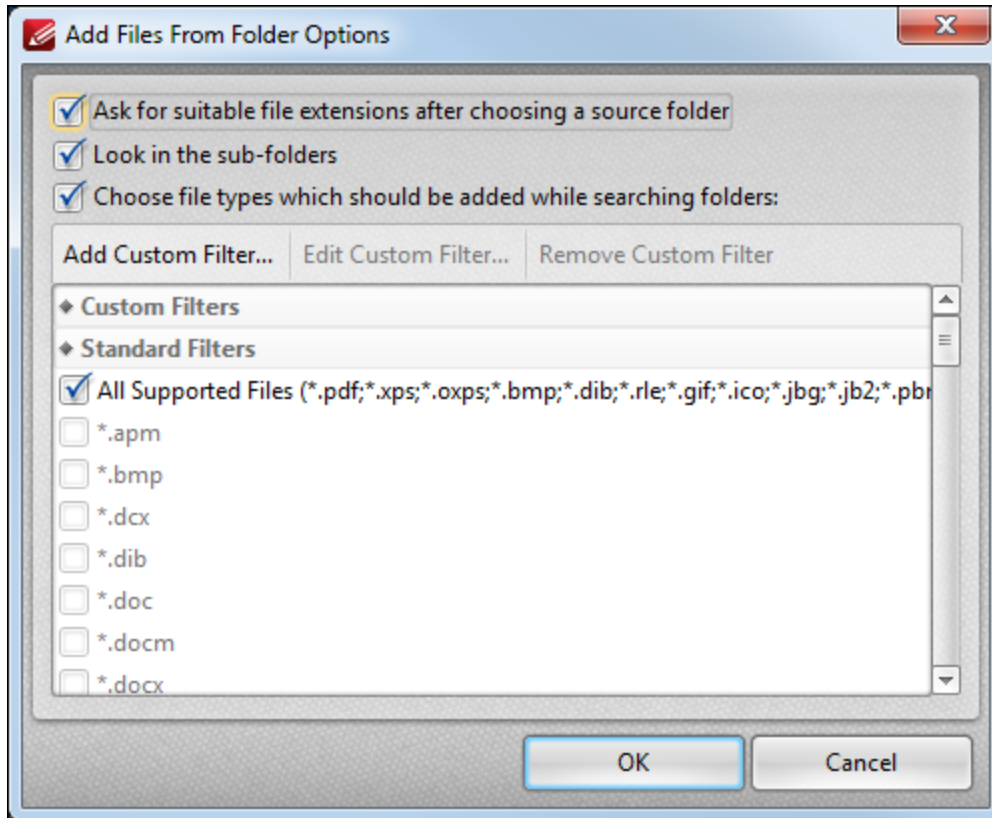
Figure 2. Add Files From Folder Options Dialog Box

- Select the **Ask for suitable file extensions after choosing a source folder** box to launch this dialog box when folders are selected using the **Add Folder** button.
- Select the **Look in the sub-folders** box to include sub-folders of the parent folder when the software searches for files to add to the list of source files.
- Select the **Choose file types which should be added while searching folders** box to determine file types to be included when the software performs a search.
- Custom filters can be added using the **Add Custom Filter** option. This facilitates the creation of custom profiles for subsequent use that search for specific file extensions. Click the text to open the **Add Custom Filter** dialog box:
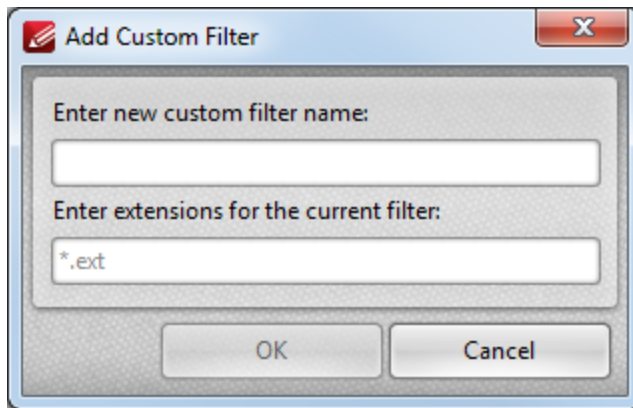
Figure 3. Add Custom Filter Dialog Box

- Enter a name for the custom filter.
- Enter the desired file extensions. File extensions must begin with an asterisk and a period, for example: ***.apm**, ***.bmp.**
- When the desired details have been entered, click **OK** to save the custom filter. Click **Cancel** to cancel the process and close the dialog box.

From Text Files

From Text Files

This option is intended for use when only text files are used as the source files to combine into a single PDF. When it is selected the following dialog box will open:
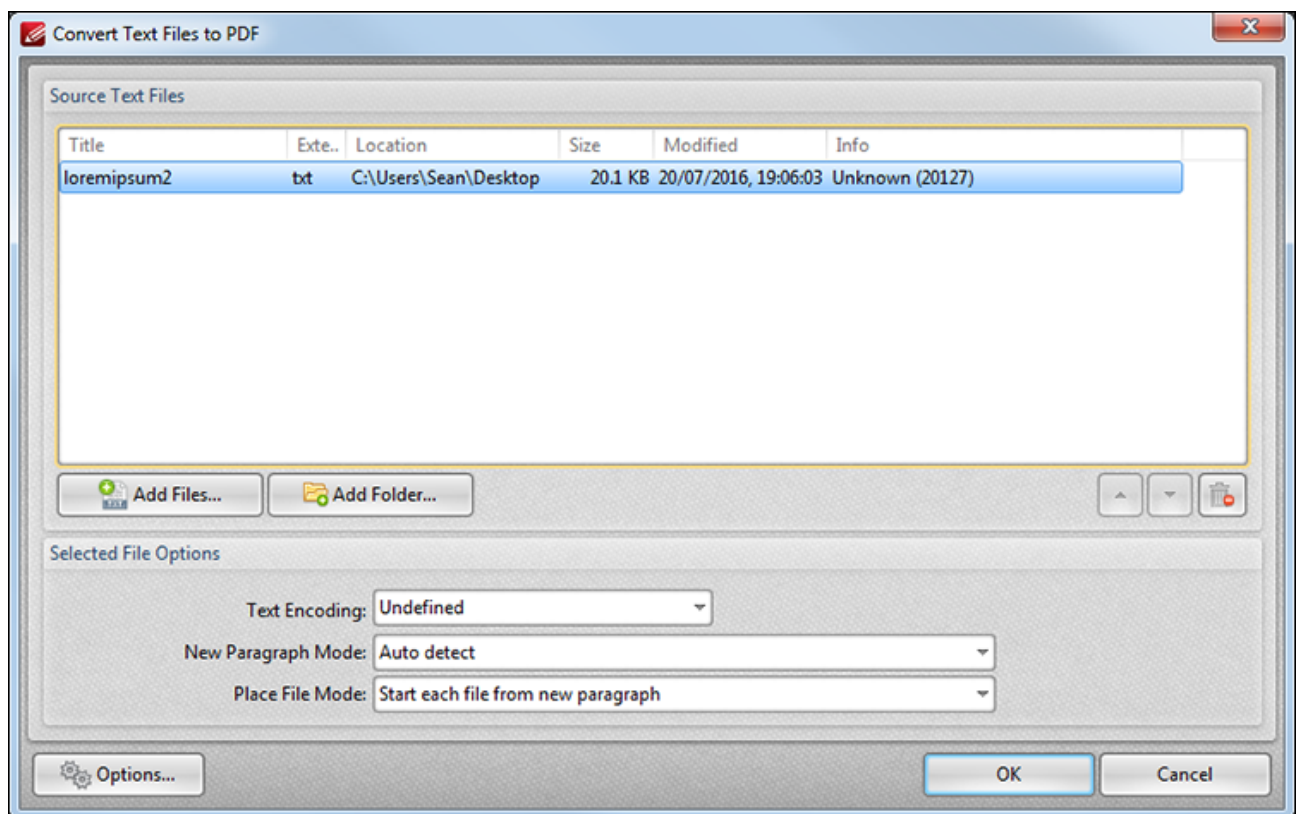
Figure 1. Convert Text Files to PDF Dialog Box

The options here are the same as those outlined in the **Combine Files into a Single PDF**²¹¹ section, with the difference that files must be in the plain text (.txt format). There are additional options that are covered in the **Selected File Options** section:

- **Text Encoding** sets the text encoding format. This determines the representation of language-specific characters within imported files.
- **New Paragraph Mode** defines when new paragraphs are started. There are four options:

- **Auto Detect** is the default setting. The software will detect automatically when new paragraphs begin.
- **Each newline character starts a new paragraph.** (A newline is a special character in computing that signifies the end of a line of text).
- **Double newline character starts a new paragraph, singles ignored.**
- **Double newline character starts a new paragraph, singles converted into space.**
- **Place File Mode** determines what happens with each file as it is placed in the combined document. There are two options:
  - **Start each file from a new paragraph.**
  - **Start each file from a new page.**
- The **Options** button in the lower-left corner provides further options for created documents. Click it to open the **Options** dialog box:
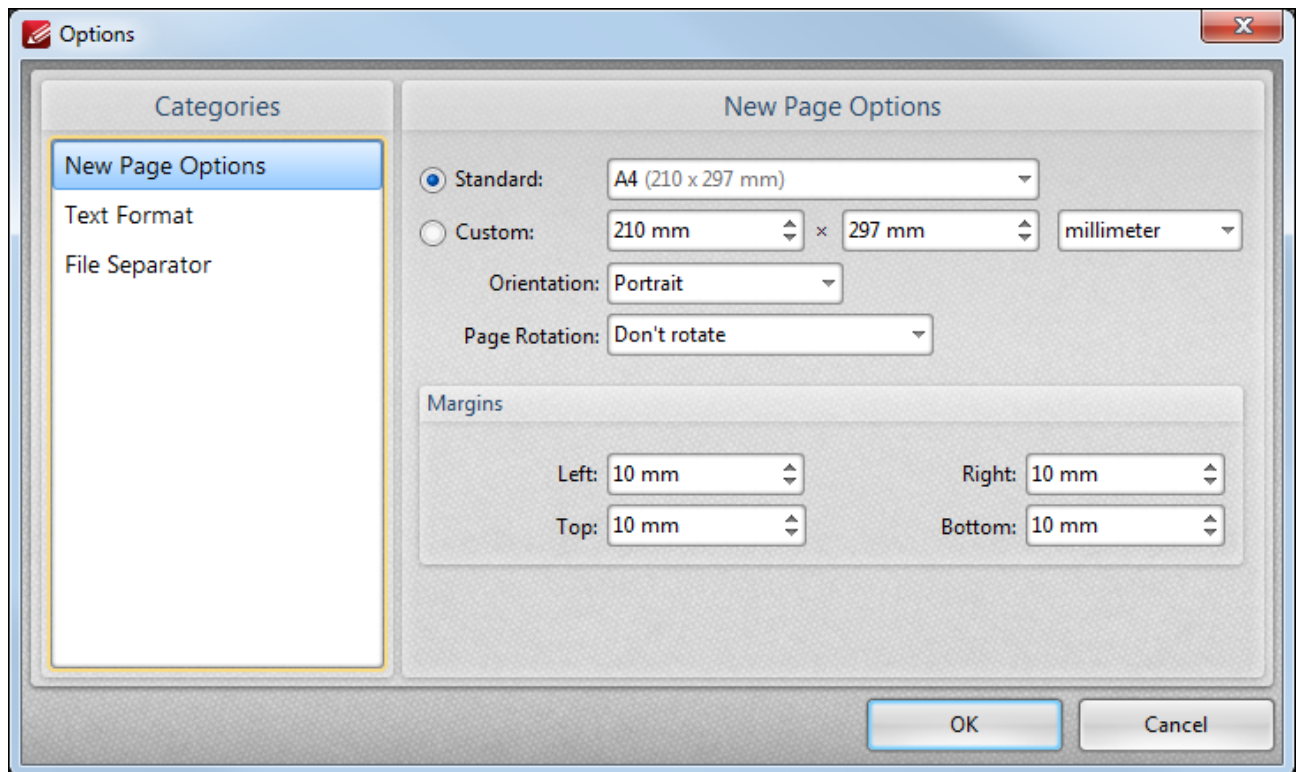
Figure 2. Options Dialog Box

New Page Options

- The **Standard** option centers the original files in a new PDF of standard size. 'Standard' refers to common sizes such as those used by the **ISO** and **ANSI**.
- The **Custom** option allows the user to enter custom dimensions.
- The **Orientation** option has the settings **Portrait** or **Landscape** as the page orientation.
- The **Page Rotation** option rotates images as required during conversion.

- The **Margins** options facilitate the customization of the image margins. Enter the values desired into the number boxes. The new PDF will feature these dimensions.

Text Format

When this option is selected, the following dialog box will open:
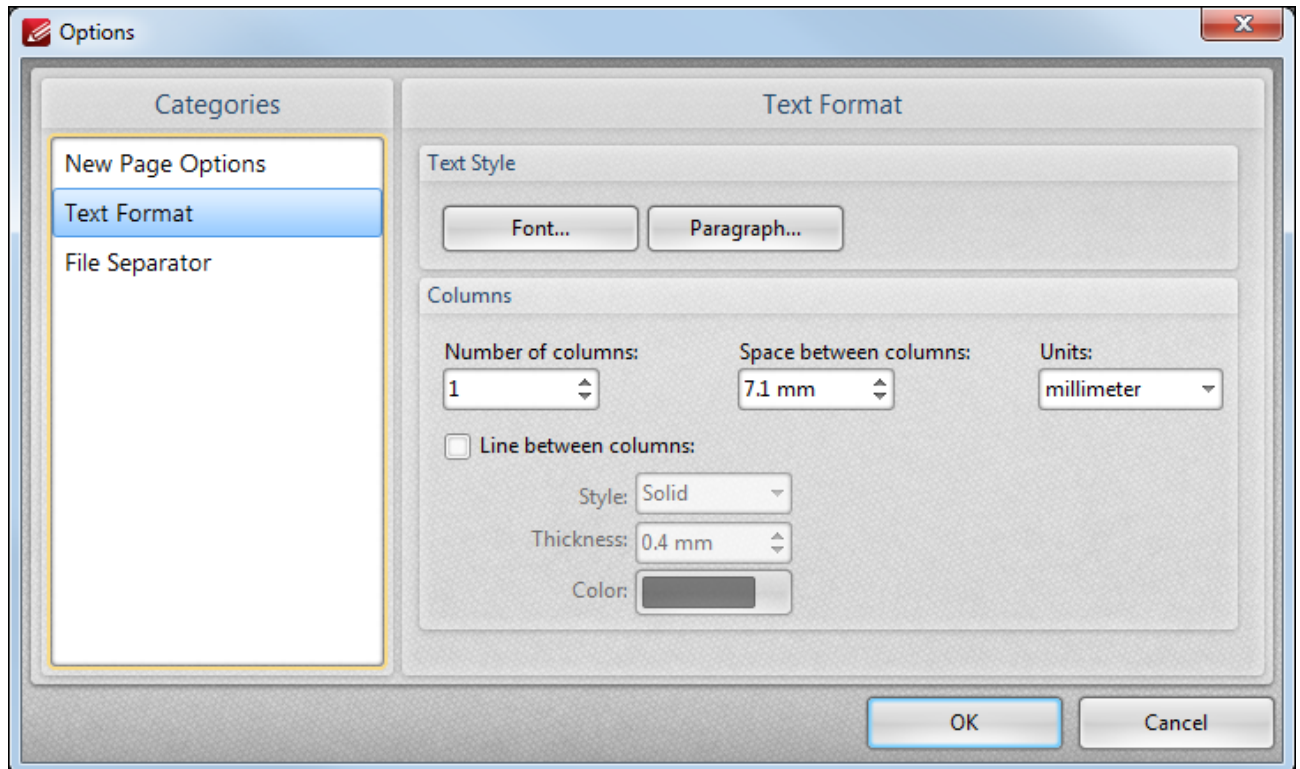
Figure 3. Text Format Options

- The **Font** and **Paragraph** buttons determine the font and paragraph settings of the text.
- The **Columns** options determine the number of columns of text, spaces between columns and unit of measurement for the spaces.
- Select the **Line between columns** box to insert lines between the columns of text. The **Style, Thickness** and **Color** settings determine the parameters of the lines.

File Separator

The **File Separator** inserts a label that shows a divide between files after they have been combined into one document. When the **File Separator** option is selected, the following dialog box opens:
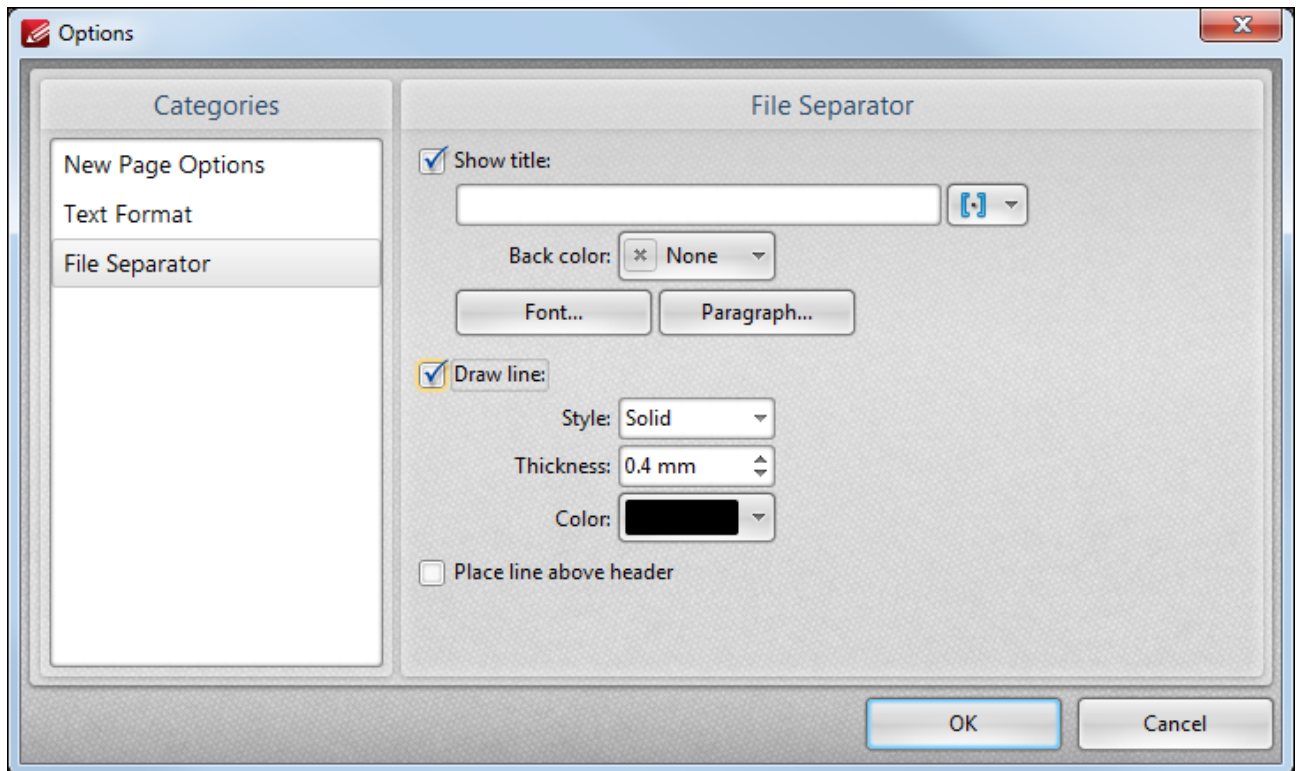
Figure 4. File Separator Options

- Select the **Show title** box to give the file separator a title. Click the icon to add macros 579.
- The **Back color** option determines the color of the file separator.
- The **Font** and **Paragraph** settings determine the font style and paragraph layout of the file separator.
- Select the **Draw line** box to add a line to the file separator. Use the menus to determine **Style, Thickness** and **Color** options.
- Select the **Place line above header** box to position the line above the header of the document.

Click **OK** to save settings. Click **Cancel** to revert to the previous settings and close the window.

From Markdown

From Markdown

This option is intended for use when only markdown files are used as the source files to combine into a single PDF. When it is selected the following dialog box will open:
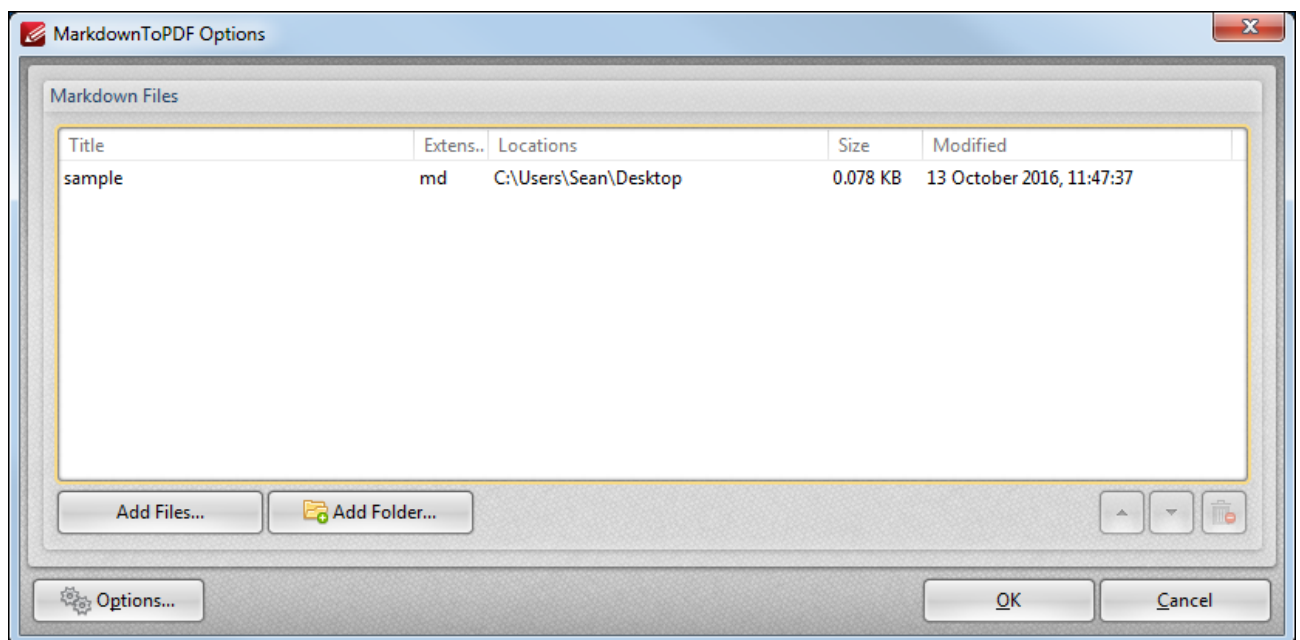
Figure 1. MarkdownToPDF Options Dialog Box

- Click **Add Files** to select individual files from the local computer to add to the list of source files.
- Click **Add Folder** to add entire folders to the list of source files.
- The **Options** button in the lower-left corner provides further options for new pages. Click it to open the following dialog box:
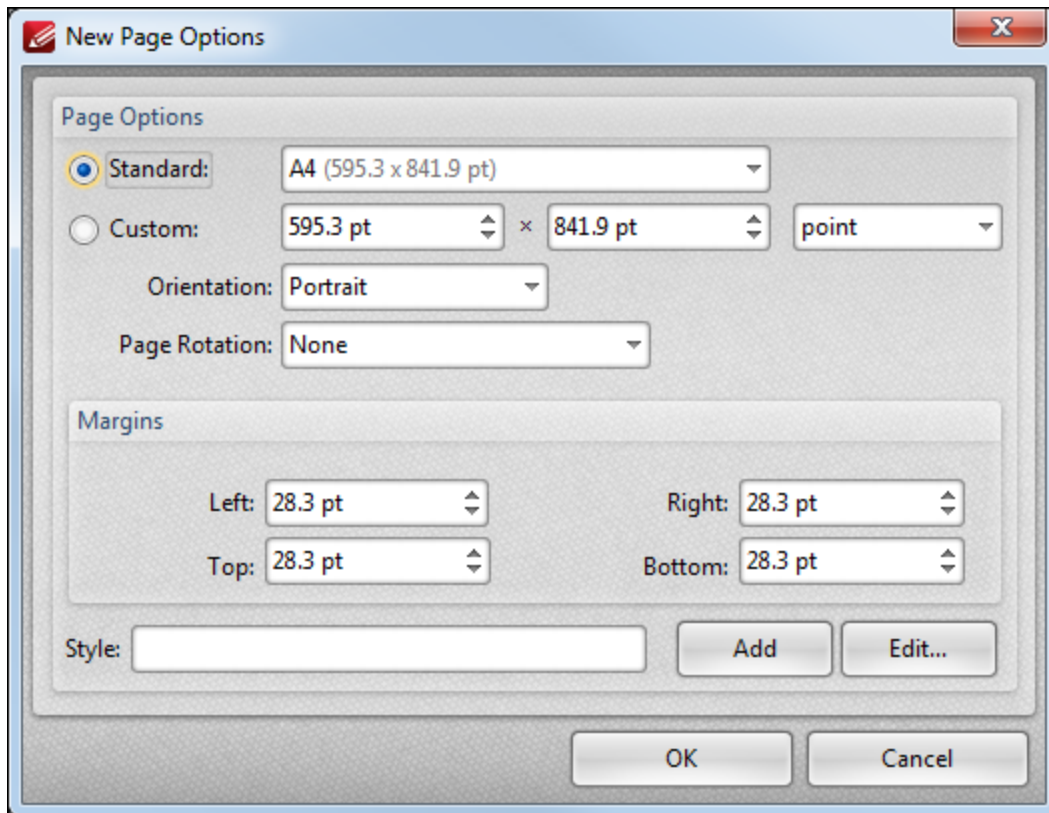
Figure 2. New Page Options Dialog Box

- The **Standard** option centers the original files in a new PDF of standard size. 'Standard' refers to common sizes such as those used by the **ISO** and **ANSI**.
- The **Custom** option allows the user to enter custom dimensions.
- The **Orientation** option has the settings **Portrait** or **Landscape** as the page orientation.
- The **Page Rotation** option rotates images as required during conversion.
- The **Margins** options facilitate the customization of the image margins. Enter the values desired into the number boxes. The new PDF will feature these dimensions.
- Use the **Style** text box to enter a preset style. Click the **Add** button to add a new style. Click the **Edit** button to edit an existing style.

Click **OK** to save settings. Click **Cancel** to cancel the process and close the dialog box.

From Rich Text Format (RTF) Files

 From Rich Text Format (RTF) Files

When this option is selected the following dialog box will open:
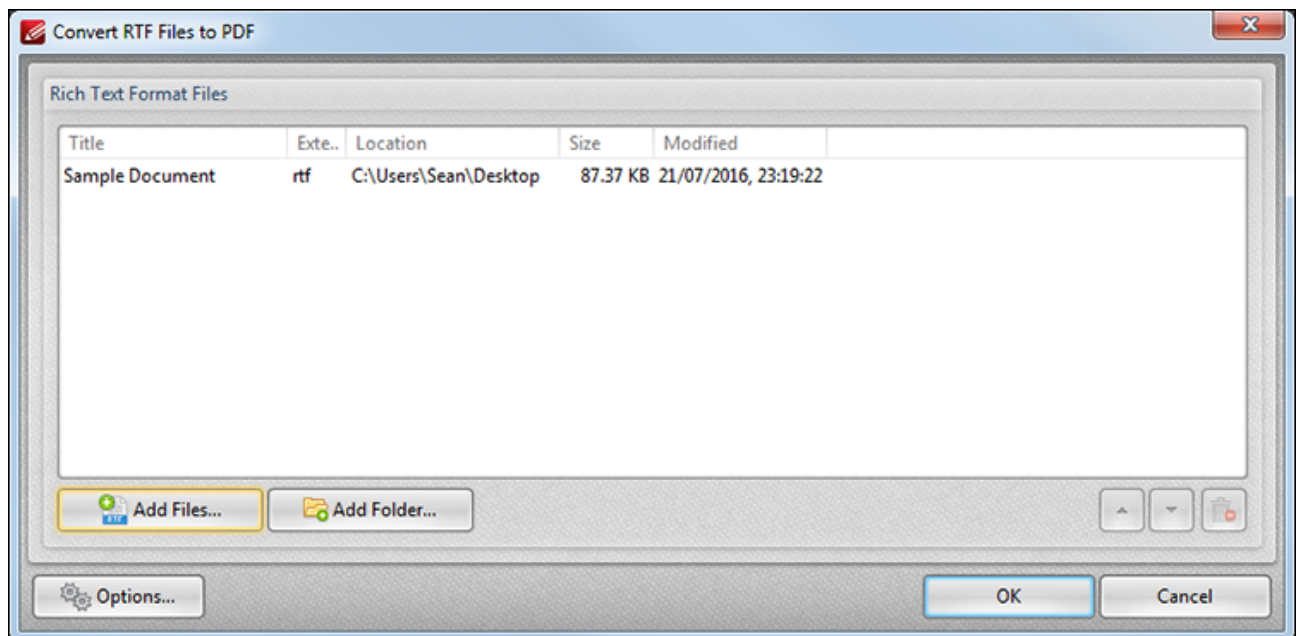
Figure 1. Convert RTF Files to PDF

The options are the same as those outlined in the **Combine Files into a Single PDF** [211] section with the differences that files must be in **.rtf** format and the parameters are different when the **Options** button is selected:
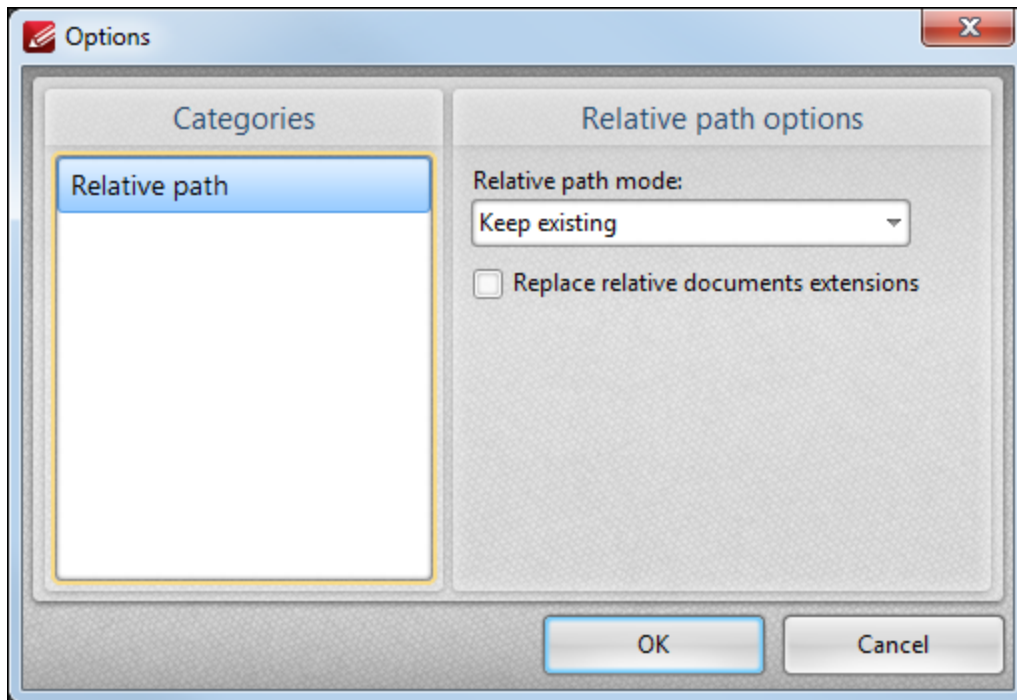
Figure 2. Convert RTF files to PDF Options

Relative path is the only option in the categories menu. There are four relative path options:

- **Keep existing** means relative paths remain as they are.
- **Make absolute** makes the relative paths absolute.
- **Make relative** makes the relative paths relative. (Absolute paths show the full name of the file/internet address in question. Relative paths are shorter and link to more specific locations).
- Select the **Replace relative documents extensions** box to create a PDF document from linked RTF files.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the dialog box.

From Image File(s)

From Image File(s)

When this option is selected the following dialog box will open:
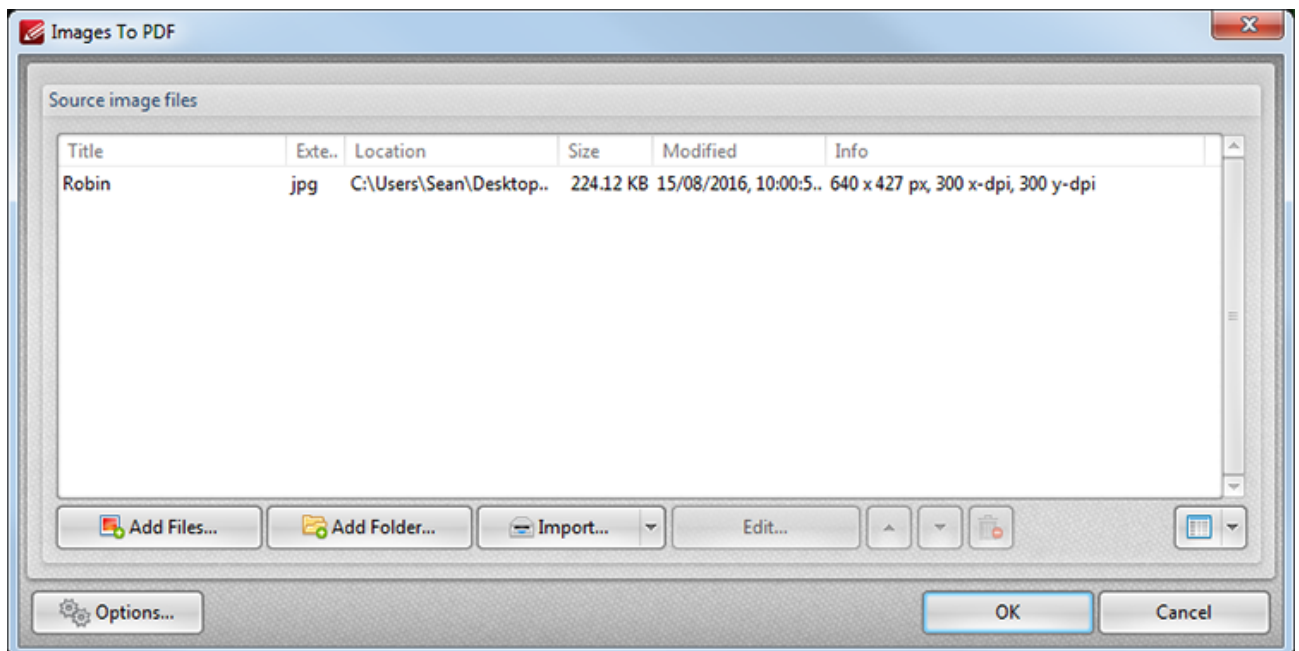
Figure 1. Images to PDF Dialog Box

- The **Add Files** and **Add Folder** options are the same as those outlined above in the **Combine Files into a Single PDF** ²¹¹ section.
- Click **Import** to add images from the local scanner. The **Scan Properties** dialog box will open. Select the desired parameters and click **Scan** to import an image.
- Select an image from the **Source image files** list and click **Edit** to edit it before it is combined with the other documents.
- Click the arrow icons to move images up or down within the list. Click the trash can icon to remove selected images from the list. The format in which files are shown within the list can be adjusted using the icon on the far right.
- Click **OK** to create the new document. Click **Cancel** cancel the process and close the dialog box.
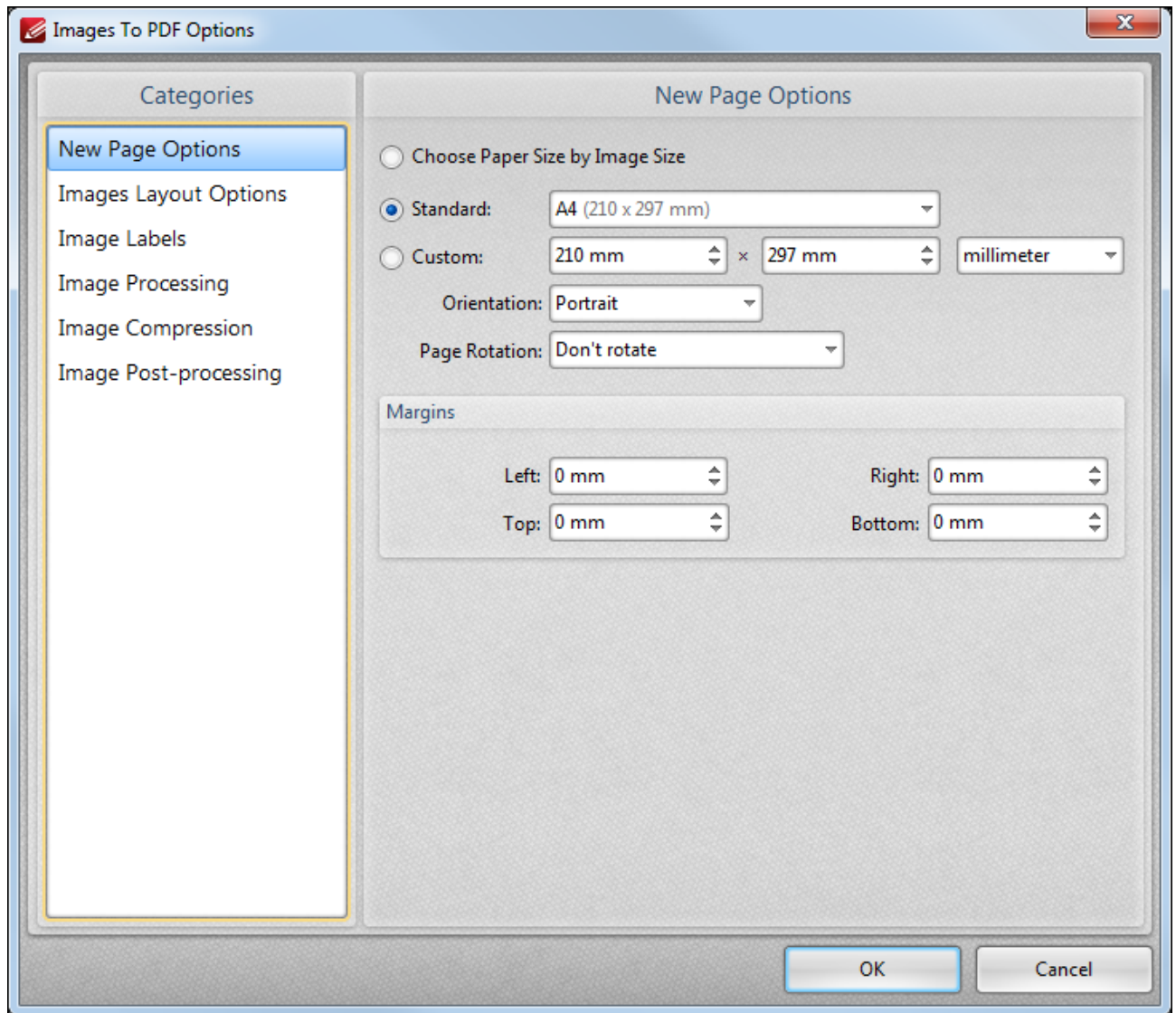
Figure 2. Images to PDF Options Dialog Box

New Page Options

When this option is selected in the **Categories** menu the dialog box in *(figure 2)* opens. The options are as follows:

- The **Choose Paper Size by Image Size** option crops new documents according to the image size converted. I.e. the borders of the original image define the borders of the new document.
- The **Standard** option centers the original file in a new document of standard size. 'Standard' refers to common sizes such as those used by the **ISO** and **ANSI**. Click the menu for a list of available sizes.
- The **Custom** option allows the user to enter custom dimensions. There is also a choice for portrait or landscape style (unless the **Choose Paper Size by Image Size** option is selected).

- The **Page Rotation** option rotates images as required during conversion. Click the menu for rotation options.
- The **Margins** option facilitates the customization of the image margins. Enter the values desired into the boxes. The new PDF will feature these dimensions.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Images Layout Options

When this option is selected in the **Categories** menu the following dialog box opens:
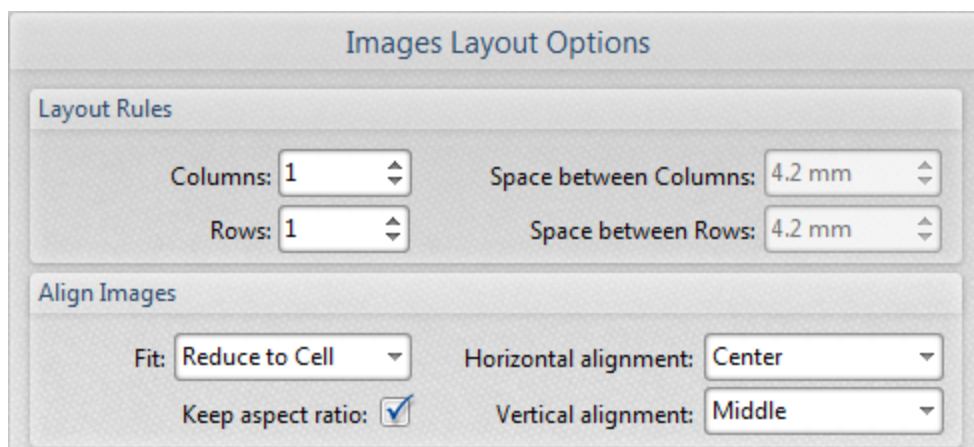
Figure 3. Images Layout Options Dialog Box

- The **Layout Rules** options determine the layout of images within new documents. Enter the desired dimensions in the **Columns** and **Rows** number boxes. Use the **Space between Columns** and **Space between Rows** boxes to determine the amount of empty space between columns and rows of images.
- **Align Images** determines the alignment of images within new documents. There are two options: **Reduce to Cell** and **Fit to Cell**. **Reduce to Cell** is the default setting. This reduces the size of the images to fit the size of the document. If the original images are smaller than the document then they will remain at their original size. The **Fit to Cell** setting fits the images to the size of the document. If the images are smaller than the document then they will be increased in size to match the size of the new document.
- The **Keep Aspect Ratio** box is selected by default. This means that images keep their original proportions and fit the specified PDF dimensions as far as possible within those proportions. Clear this box to disable the aspect ratio. Images will then match the PDF size exactly but may distort as a result (depending on the dimensions of the PDF document in relation to the dimensions of the original images).
- **Horizontal and Vertical Alignment** determines the location at which images in the new document appear.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

When this option is selected in the **Categories** menu the following dialog box opens:
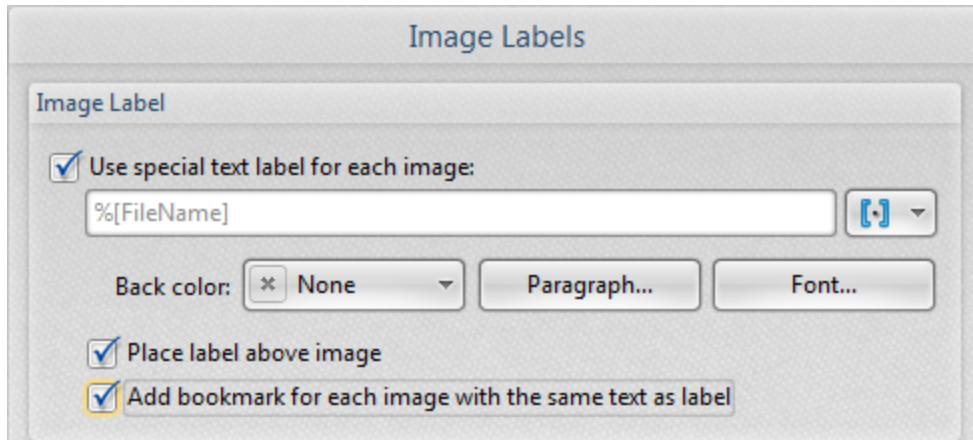
Figure 4. Image Labels Dialog Box

- Select the **Use special text label for each image** box to enable further options.
- Enter the desired label text in the text box. Macros 579 can be added at this point. Include them in the file name or click the icon to select them manually.
- **Back Color** determines the background color of the label. Click the box to open a menu of available colors.
- The **Paragraph** settings determine the alignment, indentation and spacing of the text on the label. Click **Paragraph** to adjust these settings. The indentation settings include two special options. Select the **First Line** option to indent the first line, as in a standard paragraph. The second special option is **Hanging** indentation, which means the first line is not indented but all subsequent lines are. When either of these settings are being used the **'By'** box must be adjusted accordingly.
- The **Font** settings determine the font used for the label. When it is selected the dialog box in **(figure 5)** will open.
- If the **Place label above image** box is not selected then the label will appear below the image.
- Select the **Add bookmark for each image with the same text as label** as desired. (Bookmarks are navigational tools that allow the reader to locate and link to points of interest within a document).
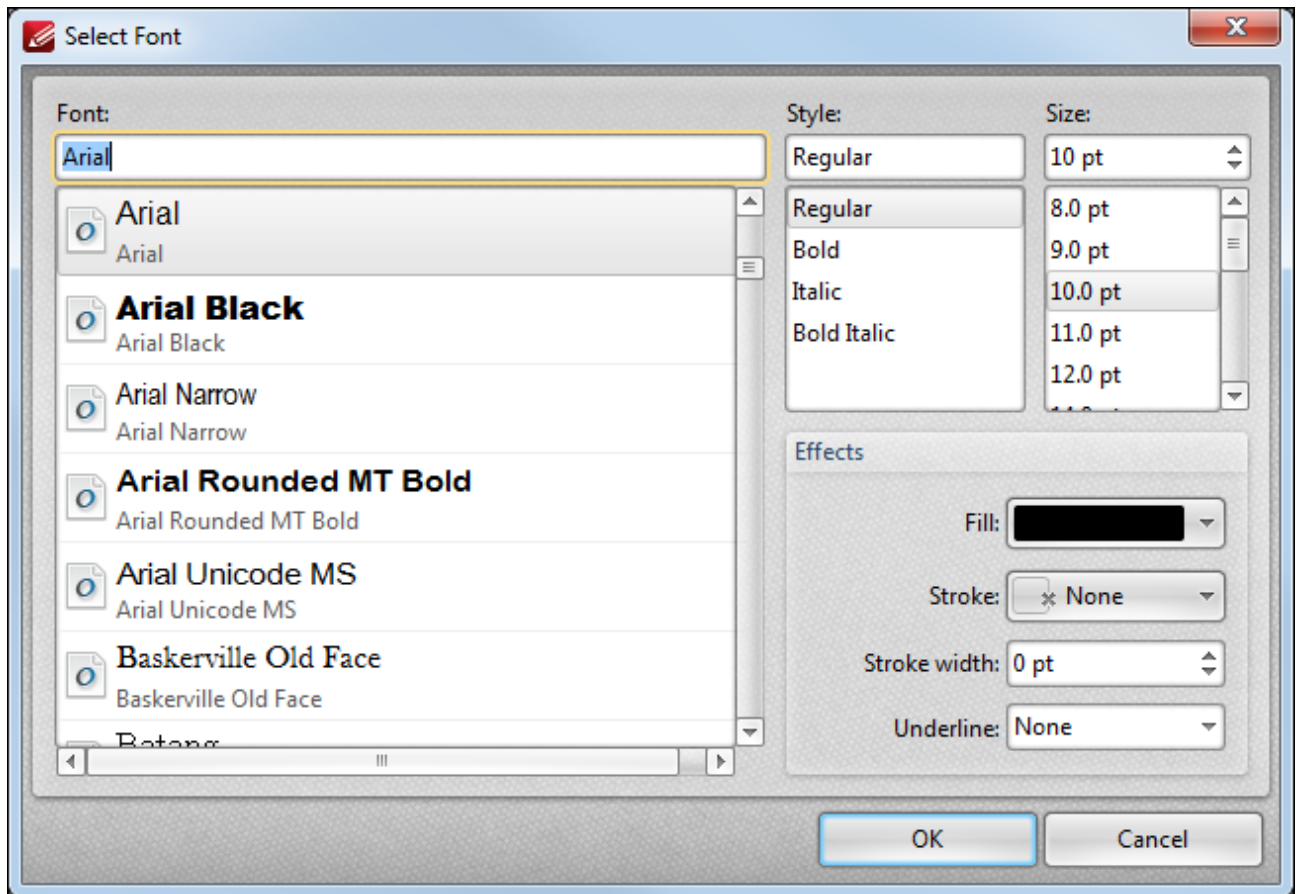
Figure 5. Select Font Dialog Box

- Use the **Font** text box to enter the name of the desired font, or select one from the options lilsted below.
- Use the **Style** menu to determine the style of the font.
- Use the **Size** menu to determine the size of the font.
- Use the **Fill** menu to determine the color of the font.
- Use the **Stroke** menu to determine the color of the stroke. This color will border the text.
- Use the **Stroke width** menu to determine the size of the stroke.
- Use the **Underline** menu to enable/disable font underline.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Image Processing

When this option is selected in the **Categories** menu the following dialog box opens:
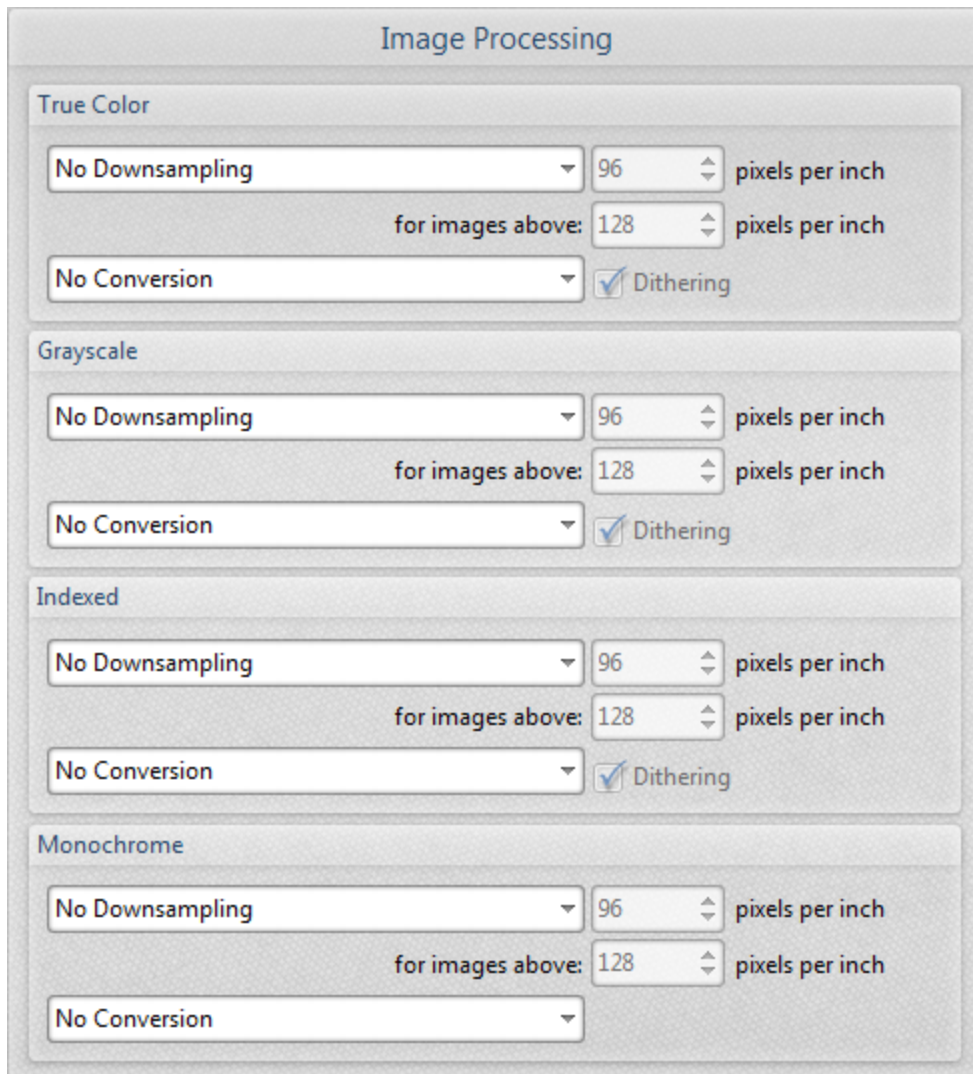
Figure 6. Image Processing Dialog Box

- These settings determine the dimensions for converted documents of different formats: **True Color, Grayscale, Indexed** and **Monochrome.** There are two options for each format:
- **Downsampling** reduces the sampling rate of images. Each format has three options: **Linear, Bilinear and Bicubic.** Further information about these options is available here. Use the **pixels per inch** boxes to determine the size above which and to which images will be downsampled.
- **Conversion** relates to the automatic conversion of files, where possible, from one format to another. Use this option to convert the format of new files when they are created. Where applicable, select the box for dithering as desired.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Image Compression

When this option is selected in the **Categories** menu the following dialog box opens:
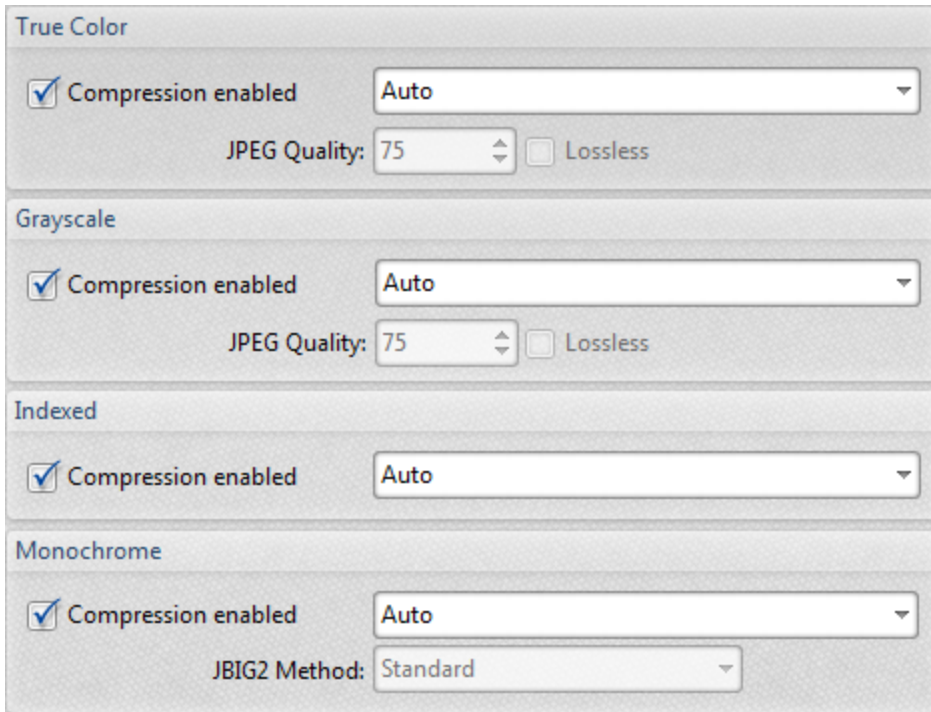
Figure 7. Image Compression Dialog Box

- Image compression is enabled by default. Clear the boxes to disable this setting.
- When compression is enabled, use the adjacent menu to select the type of compression that the tool performs. **Auto** is the default setting.
- Where applicable, adjust the **JPEG Quality/JBIG2 Method** and **Lossless** options as desired.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Image Post-processing

When this option is selected in the **Categories** menu the following dialog box opens:
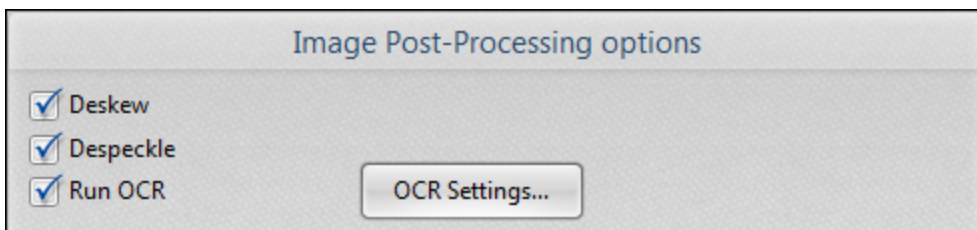
Figure 8. Image Post-Processing Options Dialog Box

- Select the **Deskew** box to deskew images. This straightens the edges of images automatically and is a useful tool if images have been scanned or photographed crookedly.

- Select the **Despeckle** box to despeckle images. This removes speckles from images during conversion.
- Select the **Run OCR** box to OCR images after processing. Click the **OCR Settings** button to set the language and accuracy of the OCR process.

Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

From Scanner

From Scanner

This option creates a new document directly from the local scanner. When it is selected the following dialog box opens:
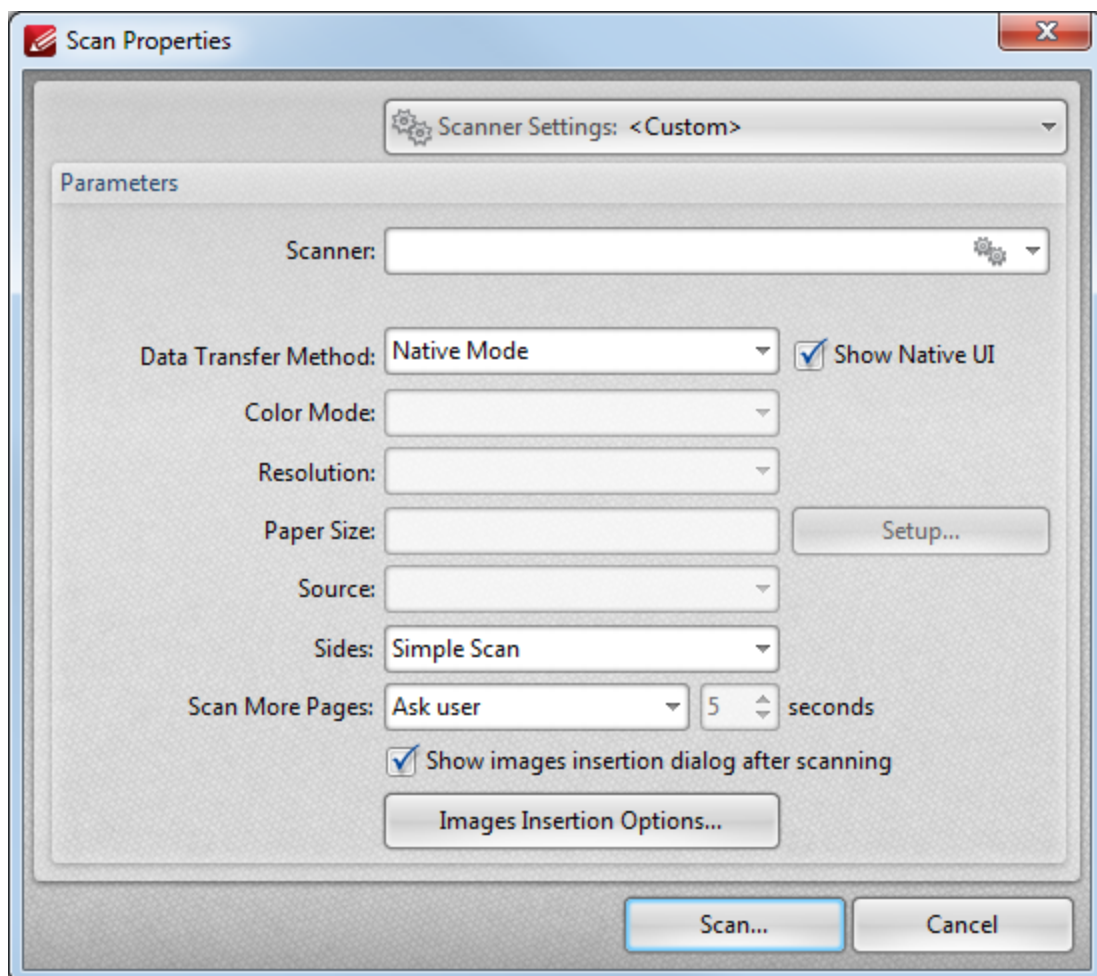
Figure 1. Scan Properties Dialog Box

- Click the **Scanner Settings** menu to open the menu shown in *(figure 2)* below.
- Click the **Scanner** menu to select the scanner to be used.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode.**

- **Color Mode** has four options: **Auto detect, Color, Grayscale** and **Black & White**. These refer to the format of scanned documents.
- Click the **Resolution** menu to select the **dpi** (dots per inch) of scanned documents.
- **Paper Size** refers to the size of the paper used when scanning. Click **Setup** for further options, which are as follows:
    - The **Automatic** option determines the paper size automatically.
    - The **Standard** option contains standard sizes such as those used by the **ISO** and **ANSI**.
    - The **Custom** option can be used to enter custom dimensions.
    - Select either **Portrait** or **Landscape** as the orientation of the document.
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner being used.
- Click the **Sides** menu to determine which sides of documents are scanned. There are three options: **Simple Scan, Manual Duplex** and **Manual Duplex Reversed.** Click the arrow for an explanation of these options.
- Click the **Scan More Pages** menu to select the setting for when additional pages are scanned.
- The **Show images insertion dialog after scanning** box is selected by default. This means the dialog box that determines image insertion will appear after the scan. Clear the box to skip this step of the process.
- The **Show Native UI** box is selected by default. This means the scanner selects certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the box to determine these parameters manually.
- Click the **Images Insertion Options** button to determine further options for inserted images. Those options are explained <u>here.</u> 222
- Click **Scan** to perform the scan. Click **Cancel** to cancel the process and close the dialog box.

Scanner Settings

Click the **Scanner Settings** menu to save custom settings for subsequent use. The following dialog box will open:
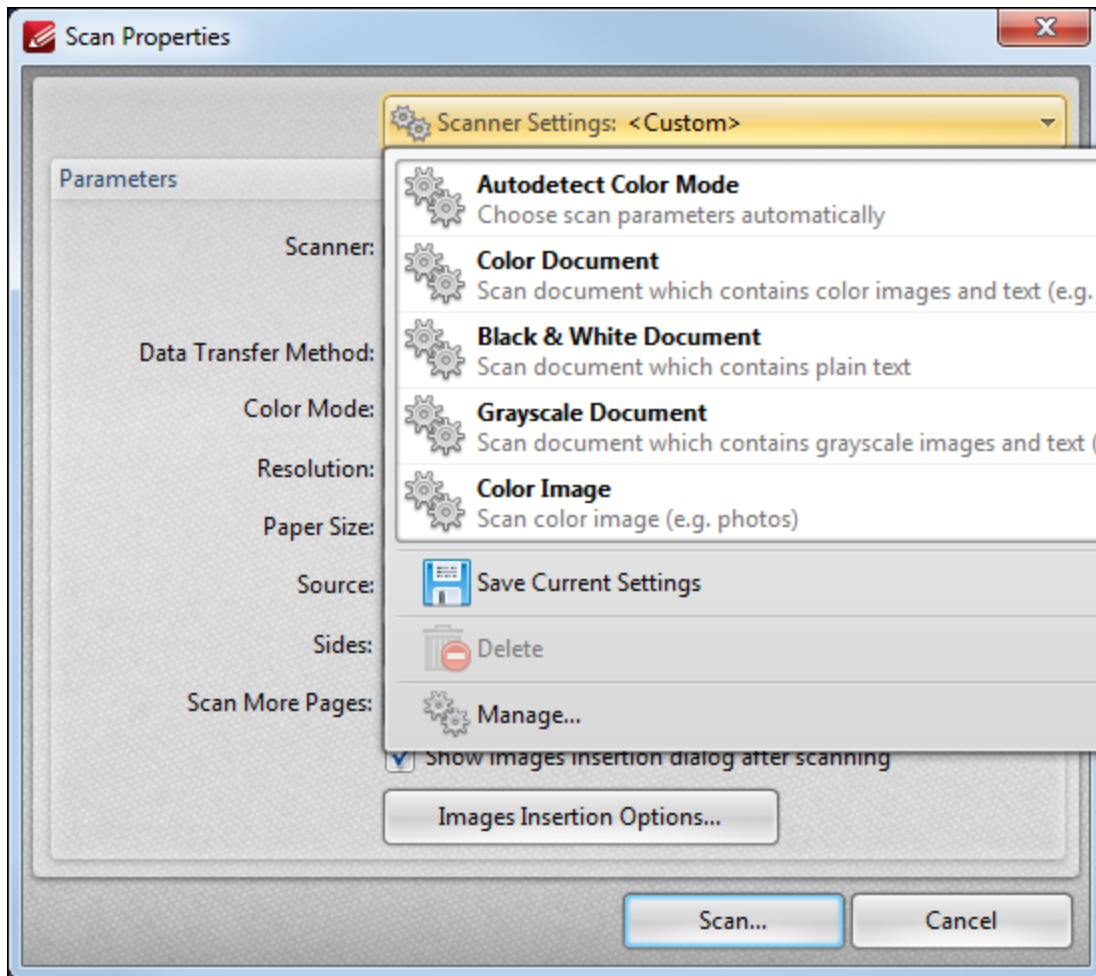
Figure 2. Scanner Settings Options

This menu is used to adjust the scanner mode or save custom settings. There are five preset modes that relate to the format of scanned documents. They feature settings that are optimal for their respective modes. These modes can also be selected when choosing the option through which the new document is created. Hover the pointer over the **New Document>From Scanner** option and a menu will appear. The options to **Custom Scan** and **Configure Presets** are also available on this menu. Click **Custom Scan** to launch the **Scan Properties** dialog box shown in *(figure 1)* above. Click **Configure Presets** to open the **Configure Scanner Presets** dialog box and determine the presets for scanning.

When custom parameters have been entered in the **Scan Properties** dialog box they can be saved for subsequent use with the **Save Current Settings** option. Click the icon/text to save the current settings. Enter a name (and brief description, if desired) for the customized settings. Click **Manage** to edit customized settings and **Delete** to remove them.

Send by E-mail

Send by Email

This option sends a copy of the active PDF document to a designated recipient. When this option is selected for the first time a dialog box opens. There are four options:

- **Send by Mail Client** launches the default mail client with the PDF as an attachment.
- **Send by SMTP** sends the PDF by letter protocol. This must be configured using the Edit>Preferences>Send Mail [315] setting.
- **Manual Send** prompts the user to select a file manually from the local computer.
- **Cancel** stops the process and closes the dialog box.

Select the **Remember my choice** box to select the same choice automatically when this feature is used subsequently.

Please note that a default mail client such as Microsoft Outlook™ or Thunderbird is required for the Send by Email function.

Revert

Revert

This option is available when a file is open in **PDF-XChange Editor** and has unsaved changes. Click **Revert** to undo the unsaved changes and revert to the most recently saved version of the file.

Close Options

Close Options

These options are used to close documents that are currently open in **PDF-XChange Editor.** Use **Close** if only one document is open and **Close All** if more than one document is open.

Export

Export

The **Export** options are used to export selected pages or selected areas of pages as an image file or PowerPoint presentation. When a file is open in **PDF-XChange Editor** select **Export to Images** to open the **Export to Images** dialog box:
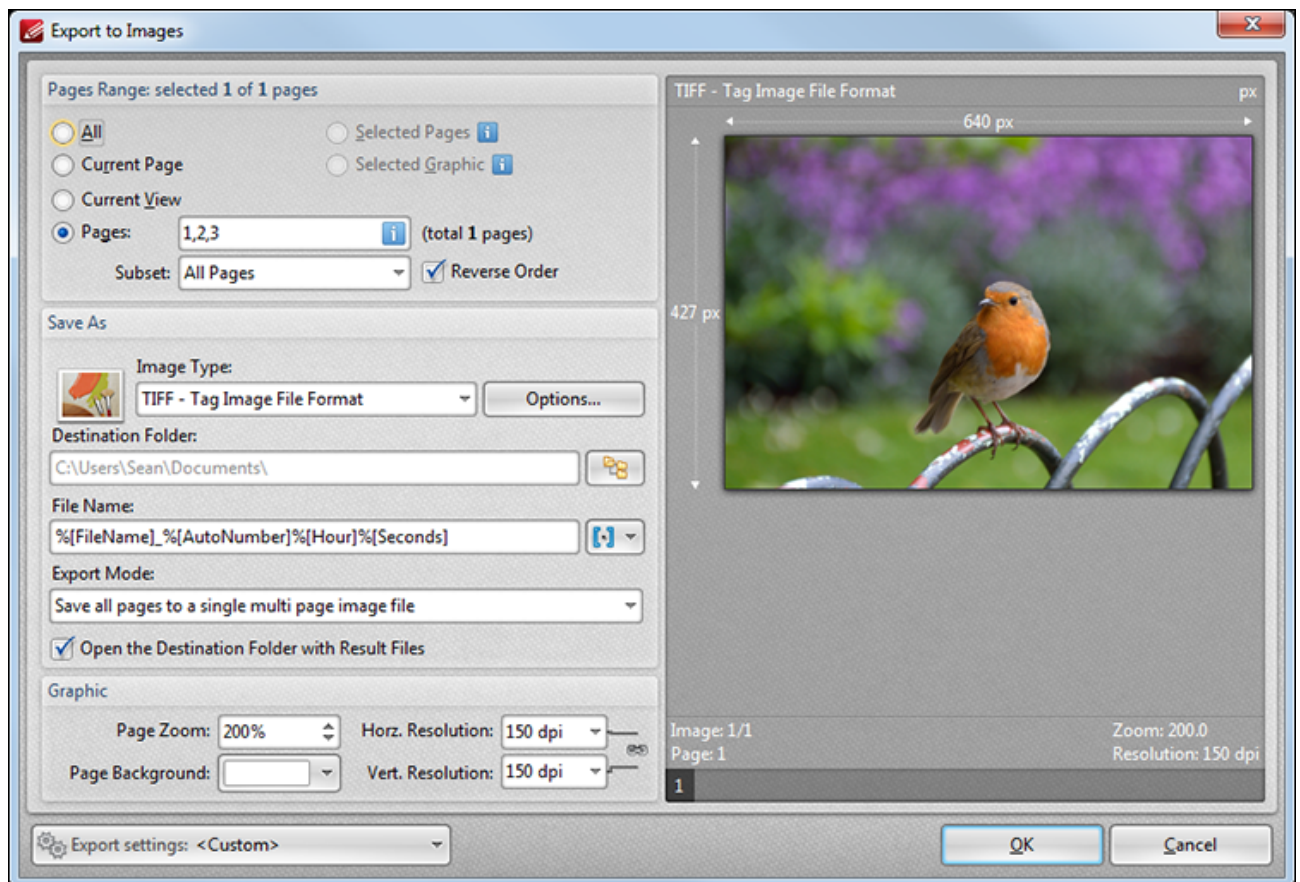
Figure 1. Export to Images Dialog Box

- Use the **Pages Range** options to select the pages that will be exported. The following options are available:
  - Click **All** to export the entire document.
  - Click **Current Page** to export only the page that is currently being viewed.
  - Click **Current View** to export what is currently visible in the PDF viewer.

- Use the **Pages** option to select specific pages or page ranges. Separate individual pages with a comma and page ranges with a hyphen. If multiple page ranges are included then separate them with a comma.
- Use the **Subset** option to select either all odd or all even pages of the document.
- Select the **Reverse Order** box to export pages in reverse numerical order.
- Use the **Save As** options to determine the file type and location of the saved document:
    - Use the **Image Type** option to determine the image format. Click the **Options** button to determine further document properties.
    - Use the **Destination Folder** text box to enter the folder in which the document will be saved. Alternatively, click the adjacent icon to browse the folders on the local computer.
    - Use the **File Name** text box to enter a file name for the new document. It is possible to include macros 579 in the file name - either type them after the file name or click the adjacent icon.
    - Use the **Export Mode** setting to select the mode in which multiple-page documents are exported. There are three options:
        - Save all pages to a single multi page image file.
        - Save each page range to a multi page image file.
        - Save each page to a separate single page image file.
    - The **Open the Desintation Folder with Result Files** box is selected by default. Clear this box to disable this function.
- Use the **Graphic** options to determine the graphics settings:
    - **Page Zoom** increases or decreases image dimensions.
    - The **Resolution** boxes determine the horizontal and vertical resolution of images. The ratio is constrained by default. Click the chain icon to disable this setting.
    - The **Page Background** setting determines the color of the background in the new document.

When custom export options have been selected they can be saved using the **Export Settings** menu. Click **Save** to save the current settings. Enter a name (and brief description, if desired) for the settings. Click **Manage** to edit customized settings and **Delete** to remove the setting currently selected.

Export to Microsoft Powerpoint Presentation

This feature exports the project in the **.pptx** format, which is intended for use with Microsoft Powerpoint. When it is selected the **Save File** dialog box opens and the file name will be added in **.pptx** format automatically.

Export to Microsoft Word Document

This feature exports the project in the **.docx** format, which is intended for use with Microsoft Word. When it is selected the **Save File** dialog box opens and the file name will be added in **.docx** format automatically. Links created using the **Open a Weblink** 518 feature will be retained in the new format.

Export to Microsoft Excel

Our premier development team is currently working on this feature and it will be available soon. Until this is complete we recommend exporting PDF table data of excel sheets into word table data and then copying it into Excel.

Print

Print

Select this option (or press **Ctrl+P**) to print the current document. The following dialog box will open:
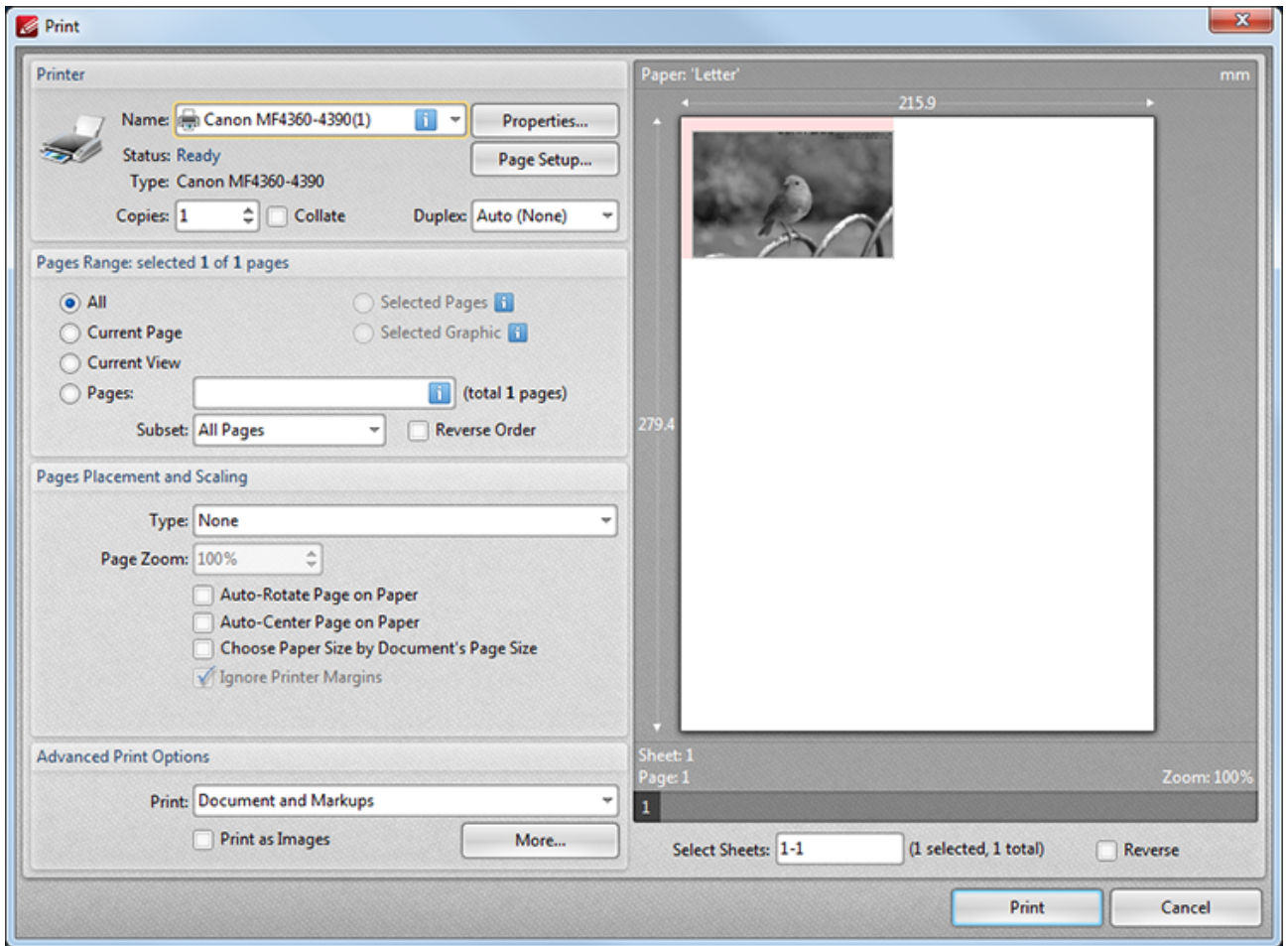
Figure 1. Print Dialog Box

- The options in the **Printer** section determine the printer to be used and its associated settings:
  - Use the **Name** text box to select a printer to use.
  - Use the **Copies** text box to determine how many copies of the document are printed.

- Select the **Collate** box to collate document pages. This is a useful feature when printing multiple copies of multi-page documents. It prints entire copies of the document together, as opposed to multiple copies of each page at a time.
- Click the **Properties** button to open the **Properties** dialog box. These options are explained with **(figure 2)** below.
- Click the **Page Setup** button to open the **Page Setup** dialog box. These options are explained with **(figure 3)** below.

- The options in the **Pages Range** section determine which pages of the document will be printed:
  - Select **All, Current Page** or **Current View**.
  - Use the **Pages** box to determine which pages of the document are printed. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
  - Select the **Reverse Order** box to print documents in reverse numerical order.

- The options in the **Pages Placement and Scaling** section determine the placement and scaling of the document:
  - Use the **Type** menu to select a standard placement setting. When a setting is selected its features will be shown in the preview window. Each setting has further options that become available when the setting is selected. The effect that these have will be shown in the preview window when they are adjusted.
  - Use the **Page Zoom** number box to determine the level of zoom on the page. Select the check boxes to enable further settings.

- The options in the **Advanced Print Options** tab determine advanced printing options:
  - Use the **Print** menu to determine which elements of the document are printed. Click the **More** button for **Print Content** and **Rendering Options.**
  - Select the **Print as Images** box to print the selected pages as images.
  - When the desired parameters have been selected, click **Print** to print the document. Click **Cancel** to cancel the process and close the dialog box.
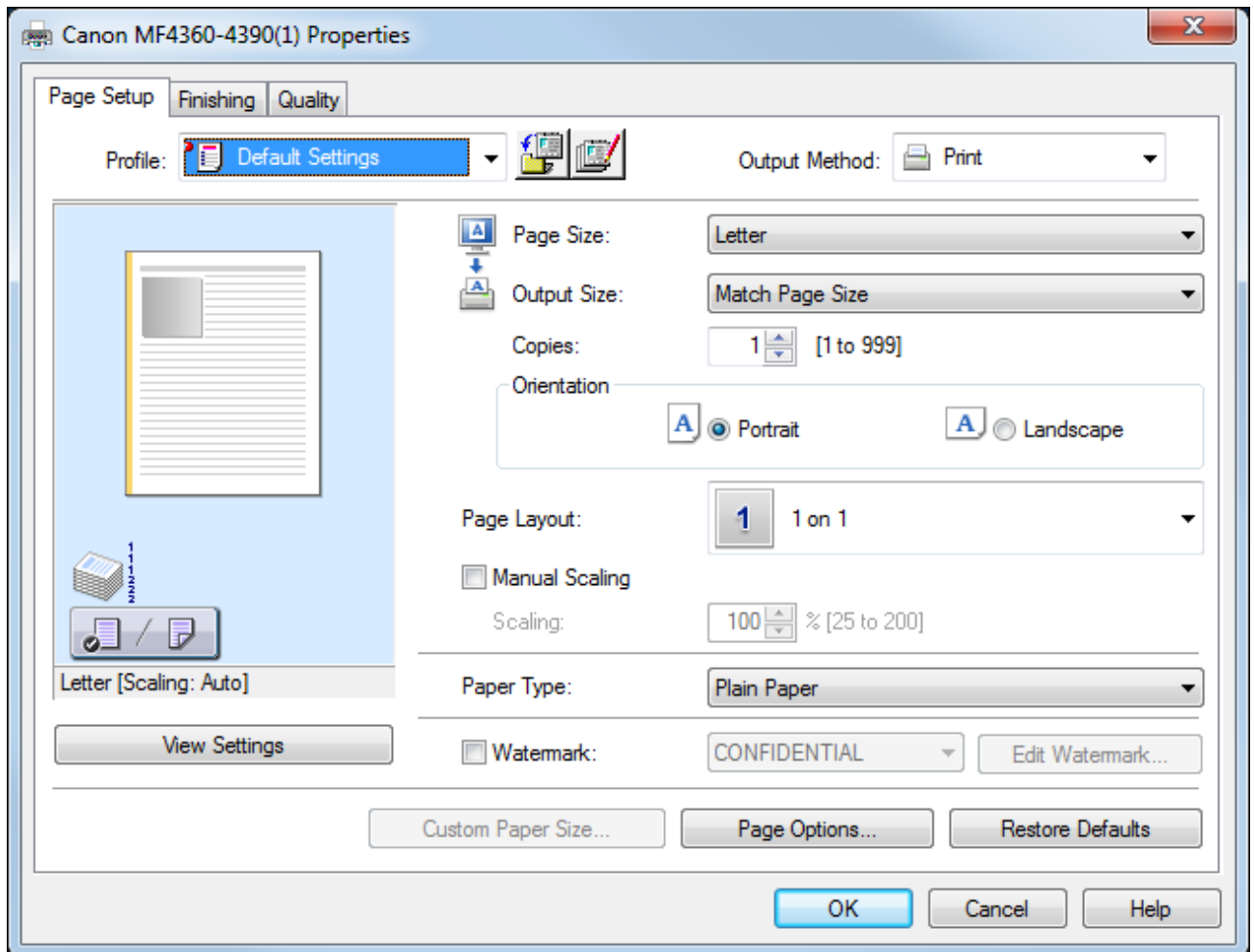
Figure 2. Properties Dialog Box

- Use the **Profile** menu to select one of the preset profiles. Their format will is shown in the preview pane. Use the icons adjacent to the menu to add/edit profiles.
- Use the **Output Method** menu to select either **Print** or **Edit and Preview**.
- Select the **Page Setup** tab to determine the page setup parameters:
    - Use the **Page Size** menu to select one of the preset page sizes.
    - Use the **Output Size** menu to select the output size. (The default setting is the same as that of the **Page Size** option).
    - Use the **Copies** number box to select how many copies of the document are printed.
    - Select either **Portrait** or **Landscape** as the orientation of the document.
    - Select an option for **Page Layout.** The default setting is the standard one-on-one format. When a different layout is selected it will be reflected in the preview pane.
    - Select the **Manual Scaling** box to enter a value for the manual scaling option.
    - Use the **Paper Type** menu to select the paper type.
    - Select the **Watermark** box to add a watermark to the document. Select a watermark from the menu. Alternatively, click **Edit Watermark** to create a new watermark.
    - Select **Page Options** to determine layout options for edging and other details.
    - Click **Restore Defaults** to revert to the default settings after changes have been made.

- Click **OK** to save changes. Click **Cancel** to cancel changes are close the dialog box. Click **Help** to open the **UFR II Printer Driver Help** manual.
- Select the **Finishing** tab to determine finishing options. These relate to the **Print Style, Binding Location** and **Finishing** options.
- Select the **Quality** tab to determine a preset printing mode from the **Objective** menu. Further details are available when modes are selected from the list.
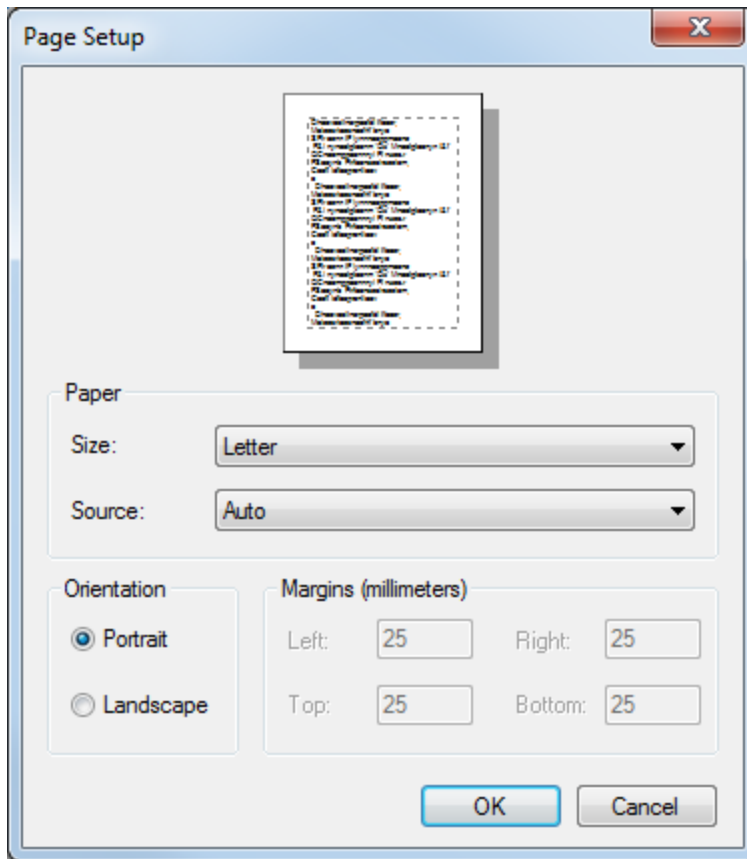
Figure 3. Page Setup Dialog Box

- Select a size for the document from the **Size** menu.
- Select a source for the document from the **Source** menu.
- Use the option buttons to select either **Portrait** or **Landscape** as the orientation for the document.
- Click **OK** to confirm changes. Click **Cancel** to cancel the process and close the dialog box.

Document Properties

Document Properties

This option is used to view and edit document properties. When it is selected the following dialog box will open:
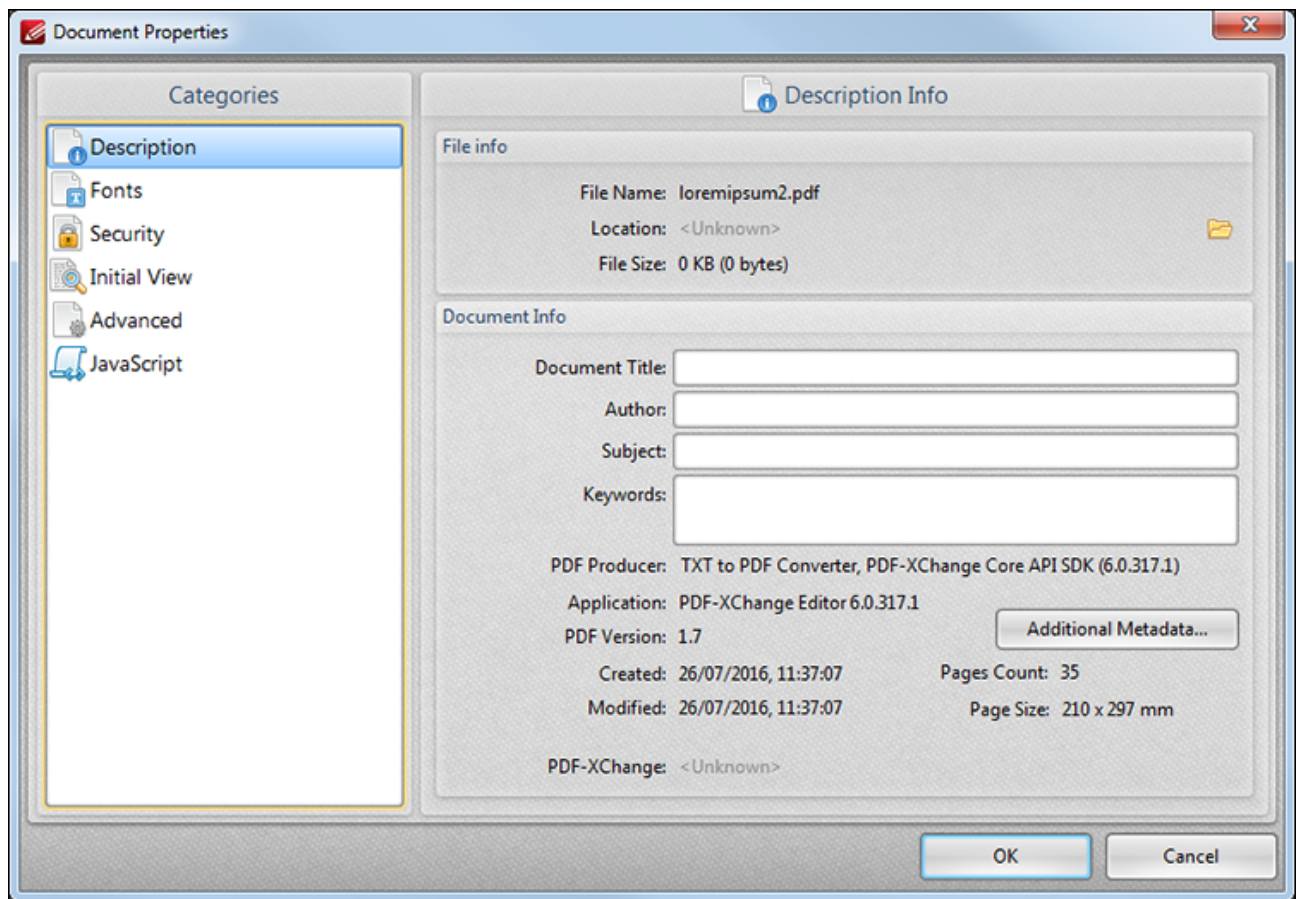
Figure 1. Document Properties Dialog Box. Description Option Selected

Select an option from the **Categories** menu to adjust further parameters:

Description

This option shows details about the document currently selected:

- The **File Info** section contains information about the File name, location and size. Click the folder icon on the right to open the containing folder on the desktop.
- The **Document Info** section contains information about the **Document Title, Author, Subject** and **Keywords.** These can be edited using the adjacent text boxes. Further document details can be viewed beneath this section. Click the **Additional Metadata** button to view/edit additional details about the document in question.

Fonts

This option shows details about fonts used within the document. The information displayed is read-only. Font embedding options can be customized using the Save as Optimized 205 settings.

Security

This option shows details about the security of the document. When it is selected the following dialog box opens:
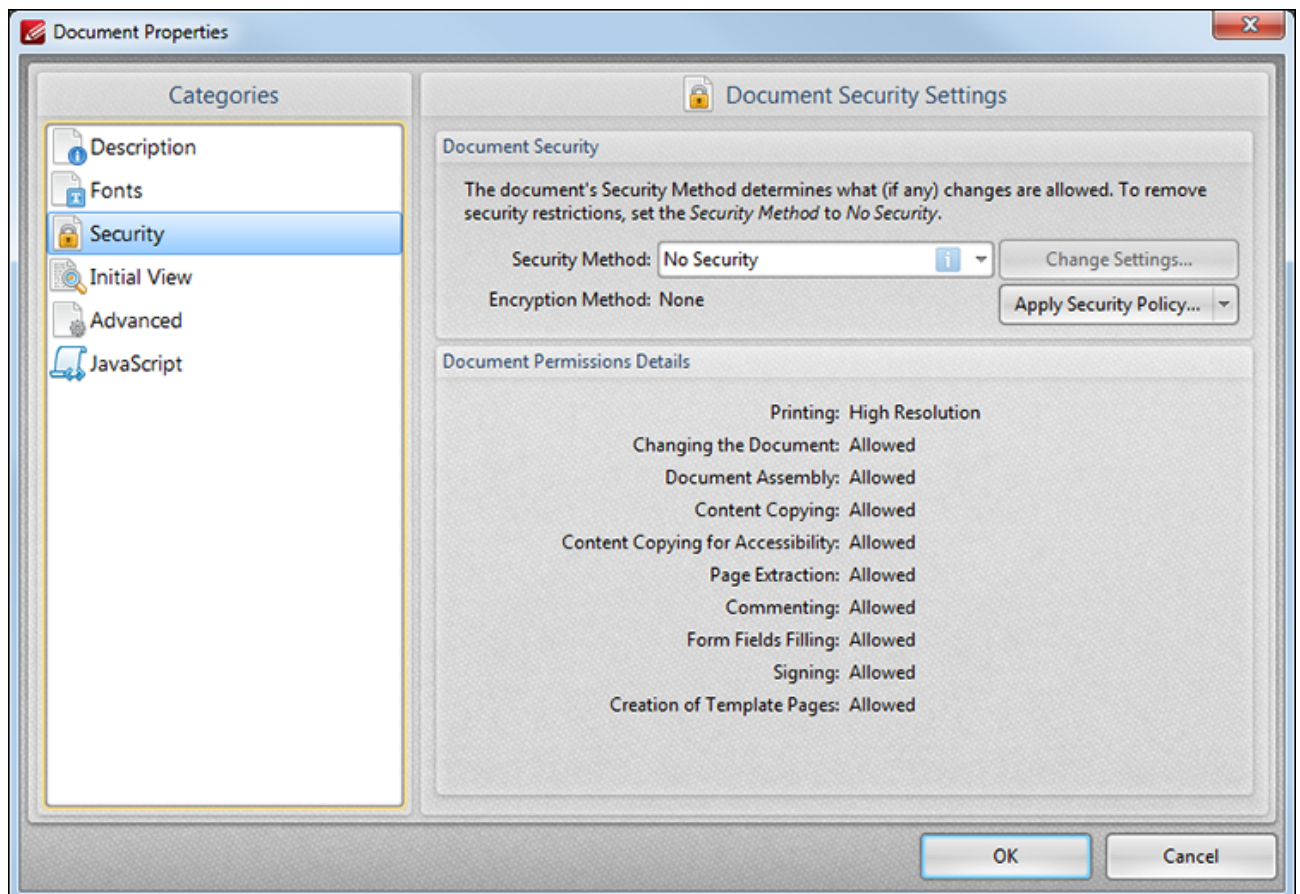
Figure 2. Document Properties Dialog Box. Security Option Selected

- Use the **Security Method** menu to select the type of security used in the document:
  - **No Security** is the default setting, which means subsequent users have no restrictions on editing the document. This option should also be used when removing security from documents.
  - **Password Security** enables document encryption, passwords and permissions. When it is selected the dialog box in *(figure 3)* opens.
  - The **Certificate Security** option is available only when documents feature certificate security.
  - The **FileOpen** option is available only when documents feature FileOpen security.
  - Click the **Apply Security Policy** button to apply a new security policy or clone/edit existing policies.

When the desired security settings have been selected, click **OK** to save them and close the dialog box. Click cancel revert to previous settings and close the dialog box.
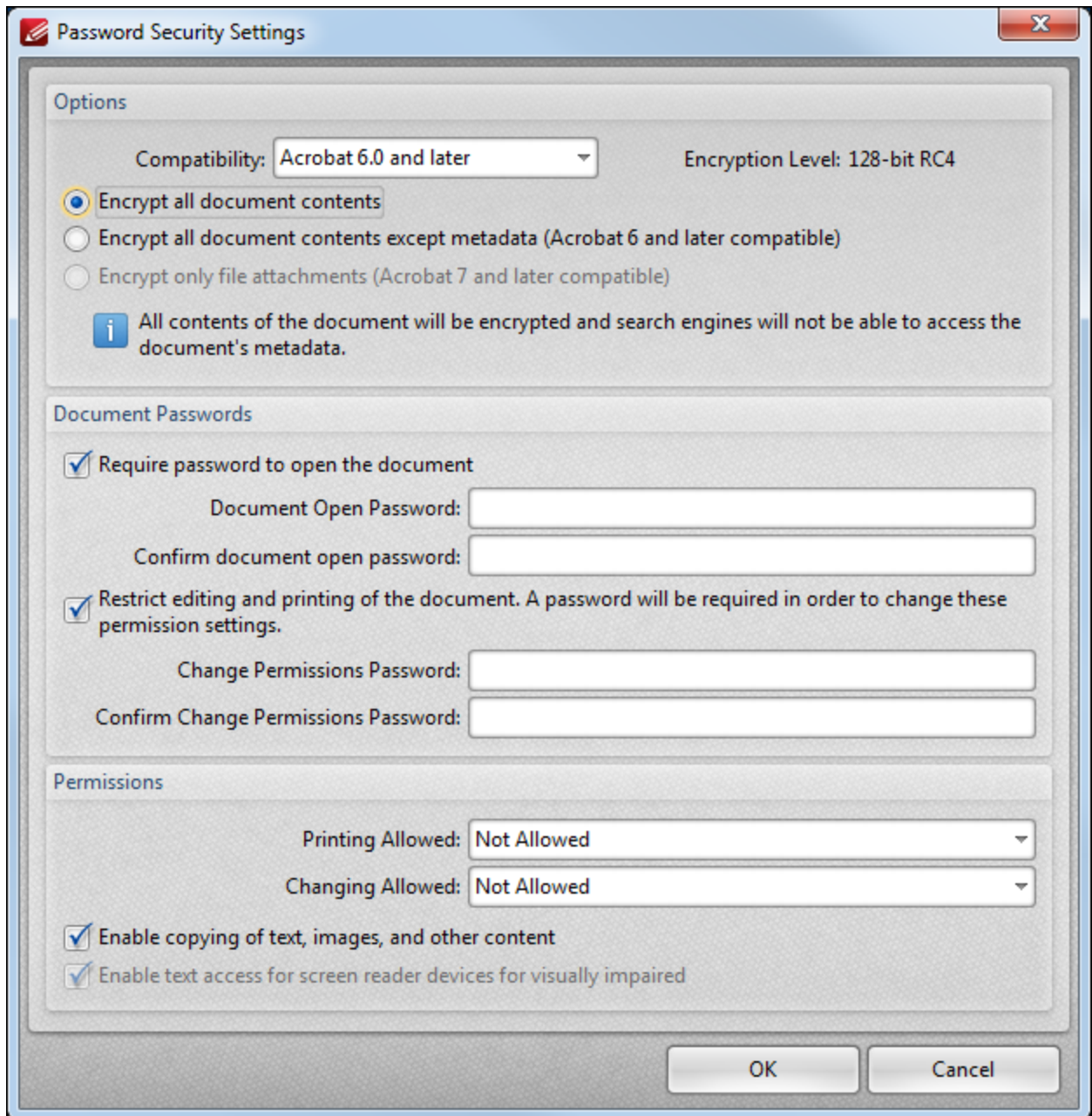
Figure 3. Password Security Settings

- Use the **Compatibility** menu to select the document security compatibility.
- Use the encryption option buttons to select the encryption settings.
- Select the **Require password to open the document** box to set a password for opening the document. Enter the password in the **Document Open Password** text box and confirm it in the text box below.
- Select the **Restrict editing and printing of the document** box to set a password for editing and printing the document. Enter the password in the **Change Permissions Password** text box and confirm it in the text box below. Use the menus in the **Permissions** section to select the settings that these passwords will enable.

When the desired settings have been selected, click **OK** to save them and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Initial View

This option determines the layout of files when they are opened. When it is selected the following dialog box opens:
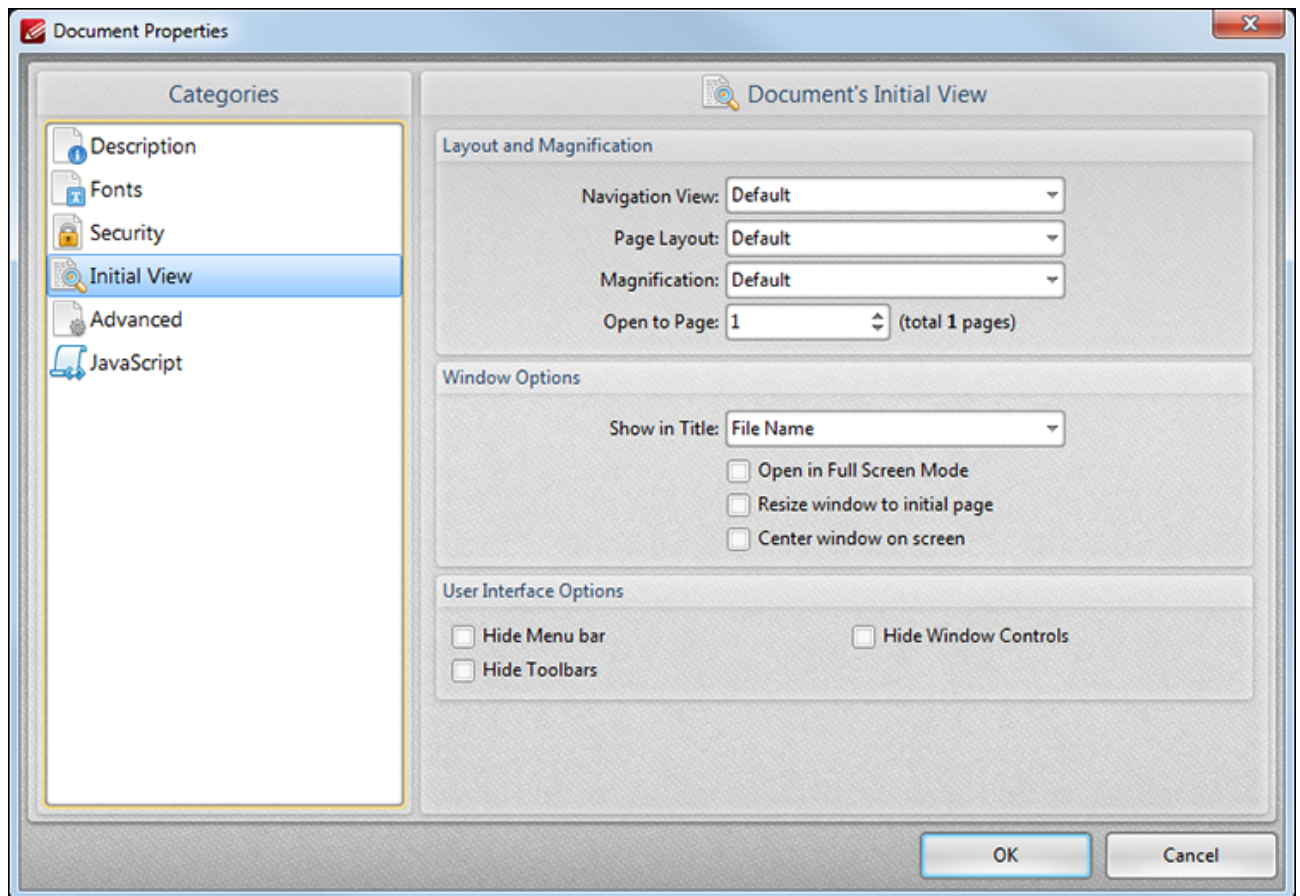
Figure 4. Document Properties Dialog Box. Initial View Option Selected

The **Layout and Magnification** settings are as follows:

- The **Navigation View** menu determines the panes that are visible when documents are opened:
    - Select **Default** to retain the default settings of the application used to open documents.
    - Select **Page Only** to view only the document itself.
    - Select **Bookmarks pane and page** to view the document and the bookmarks pane.
    - Select **Thumbnails pane and page** to view the document and the thumbnails pane.
    - Select **Layers pane and page** to view the document and the layers pane.
    - Select **Attachments pane and page** to view the document and the attachments pane.

- The **Page Layout** menu determines the page layout when documents are opened:
  - Select **Default** to retain the default settings of the application used to open documents.
  - Select **Single Page** to view a single page at a time.
  - Select **Continuous** to view pages in a single, scrolling column.
  - Select **Two Pages Continuous** to view two pages at a time in scrolling columns.
  - Select **Two Pages Continuous with Cover Page** to view as above, but with a cover page included.
  - Select **Two Pages** to view two pages at a time.
  - Select **Two Pages with Cover Page** to view as above, but with a cover page included.

- The **Magnification** menu determines the level of zoom when documents are opened:
  - Select **Default** to retain the default settings of the application used to open documents.
  - Select **Actual Size** to view pages in their actual size. The resulting display will include resolution settings.
  - Select **Fit Page** to view the full extent of page content regardless of its size.
  - Select **Fit Width** to fit pages according to their width.
  - Select **Fit Height** to fit pages according to their height.
  - Select **Fit Visible** to view the entire page within the confines of the viewing area.
  - Select an option from the list of numerical percentages to set the magnification at the same level.

- The **Open to Page** menu determines at which page documents open.

The **Windows Options** are as follows:

- **Show in Title** determines what is shown in the document tab when documents are opened. The options are **File Name** or **Document Title.**
- Select the **Open in Full Screen Mode** box to open documents in full screen mode. This option is dependent on the capabilities of the software being used.
- Select the **Resize window to initial page** box to resize the viewing window according to the dimensions of the first page of the document in question.
- Select the **Center window on screen** box to center the viewing window on the monitor screen.

The **User Interface Options** are as follows:

- Select the **Hide Menu Bar** box to hide the menu bar when documents are opened.
- Select the **Hide Window Controls** box to hide windows controls when documents are opened.
- Select the **Hide Toolbars** box to hide toolbars when documents are opened.

When the desired settings have been selected, click **OK** to save them and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

The **Advanced** document settings are as follows:

- The **PDF Settings** feature two parameters:
  - Enter a URL in the **Base URL** text box to specify a base URL for weblinks in documents. The option is included to simplify the management of web links to an external website. If the URL to the external site changes then use this setting to avoid having to edit manually every link in documents that refer to the external site. (Please note that the base URL is not used if a link contains a complete URL address).
  - The **Trapped** option determines trapping options with regard to printing. This is a complex process that aims to optimize the quality of printed documents. See here for further details.

- The **Print Dialog Presets** override the viewing application's default print settings with those specified within the file itself:
  - There are two options for **Page Scaling: Default** retains the default settings. **None** disables page scaling.
  - **Duplex Mode** determines the the default duplex mode for printing. Select an option from the menu.
  - Select the **Paper Size by document Page Size** box to determine the paper size of the document using the size of the pages in the document.
  - Enter the pages to be printed in the **Print Page Range** text box. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
  - The **Number of Copies** setting determines how many copies of the document are printed. Select an option from the menu.

- The **Reading Options** determine the direction of reading and language within the document:
  - **Binding** features the options **Left to Right** and **Right to Left.** The option selected should be the same as the reading direction of the language selected in the **Language** setting.
  - **Language** sets the language for the document.

- The **Actions** option determines when actions set within the document are executed:
  - **Before Document Close**
  - **Before Document Saving**
  - **After Document Saving**
  - **Before Document Printing**
  - **After Document Printing**
  - Use the **Edit** button to edit actions. See here⌐512⌐ for an explanation of available actions.

When the desired settings have been selected, click **OK** to save them and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Javascript

This option details any javascript that is active in the current document. Use the **Add, Edit** and **Delete** buttons to modify javascript.

Copy Full File Name

Copy Full File Name

This option copies the full file name of the current document to the clipboard of the local computer.

Open Containing Folder

Open Containing Folder

This option opens the containing folder of the current document.

7.3 Edit

Edit

When the **Edit** tab is selected, the following options are available:
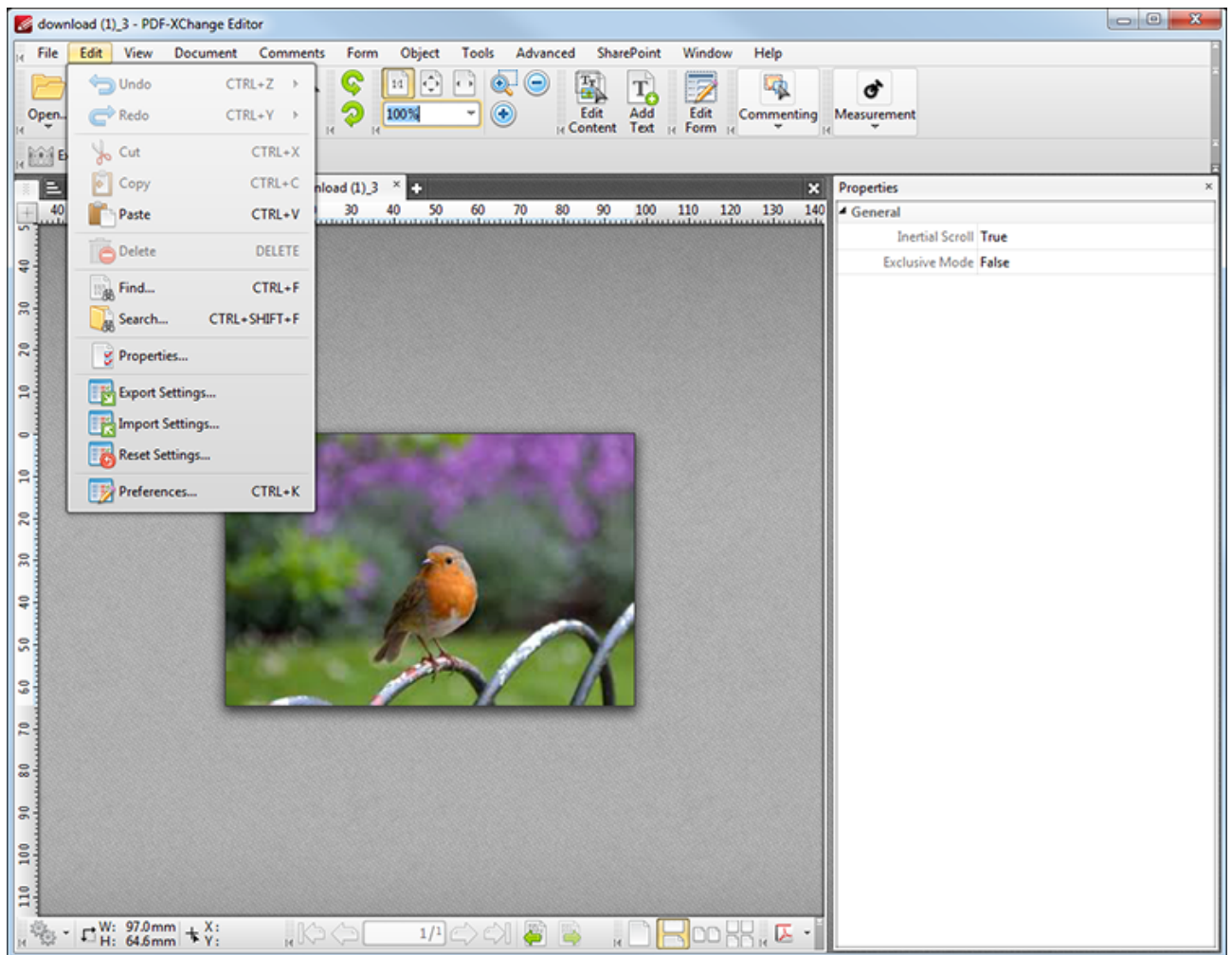
Figure 1. Edit Tab Menu

Undo/Redo

These options reverse/repeat most recent action.

Cut, Copy and Paste

These options cut/copy the area currently highlighted from the document or paste material from the clipboard of the local computer into the current document.

Delete

This option deletes the current form.

Click the links below for information regarding the remaining options in the **Edit** tab:

- **Find** 255
- **Search** 256
- **Properties** 258
- **Export Settings** 259
- **Import Settings** 260
- **Reset Settings** 261
- **Preferences** 262

Find

Find

This option launches the find text function in the current window, which appears as follows:

Figure 1. Find Function

- Enter the search terms in the text box and press enter to search the active document. Text that matches the search terms will be highlighted. Click the red cross icon to remove the highlights.
- Use the arrow next to the red cross icon to browse previous searches that have been made.
- Use the second arrow to customize searches.
- Use the left and right arrow icons to move between matching search results after the search is complete.

Search

Search

This option launches the search pane:
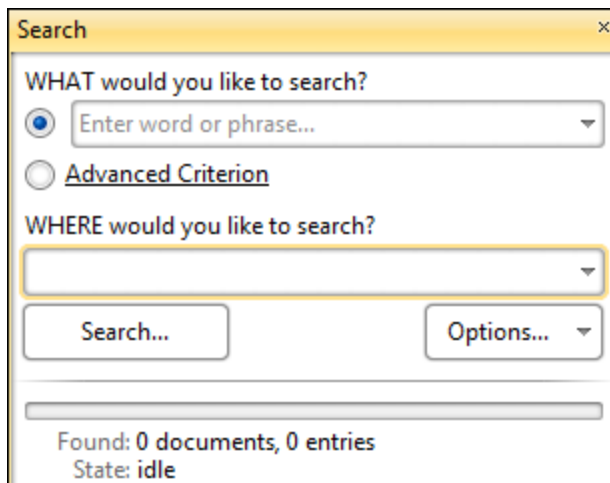
Figure 1. Search Pane

The search pane can be used to search documents open in **PDF-XChange Editor** or folders on the local computer:

- Enter the search terms in the upper text box or select **Advanced Criterion**, which is explained below.
- Use the lower text box to select where the search will take place. The options are as follows:
  - **In active document** searches only the active document.
  - **In all opened documents** searches all documents currently open in **PDF-Xchange Editor.**
  - **Browse for Folder** launches the **Select Folder** dialog box, from where it is possible to select a folder to search.
- Click the **Options** button to determine further search variables. Click options to enable them.
- Click the **Search** button to execute the search. The results will be shown in the pane beneath the search pane.

When the **Advanced Criterion** option is selected, the following pane opens:
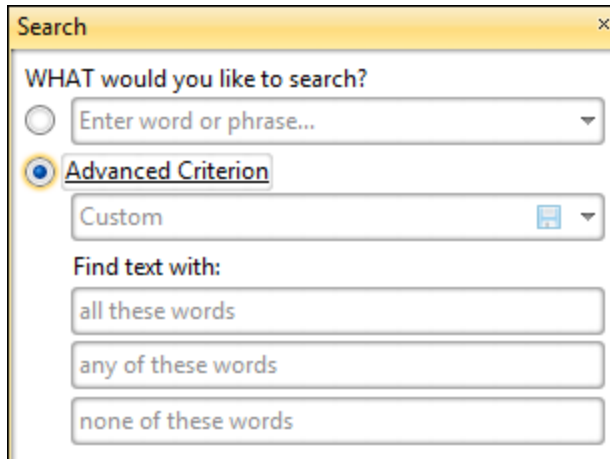
Figure 2. Advanced Criterion Options

- Use the arrow on the right side of the **Custom** text box to select a predefined search. If no searches have been predefined then the **Custom** option is not available.
- Use the three **Find text with:** text boxes to determine the search parameters:
    - If search terms are entered in the **all these words** text box, then the results will include only text strings that contain all the entered search terms.
    - If search terms are entered in the **any of these words** text box, then the results will include text strings that contain any of the entered search terms.
    - If search terms are entered in the **none of these words** text box, then the results will exclude text strings that contain any of the entered search terms.

Properties

Properties

This option launches the properties pane, which shows the properties of the object selected in the active document. Click the settings within properties to customize them as desired. Further details about properties are available in the Tools 492 section. Alternatively, most properties can be edited using the Properties Toolbar. 391

Export Settings

Export Settings

This option exports the settings of **PDF-XChange Editor** to the data file. When it is selected, the settings that are available to export are displayed in following dialog box:
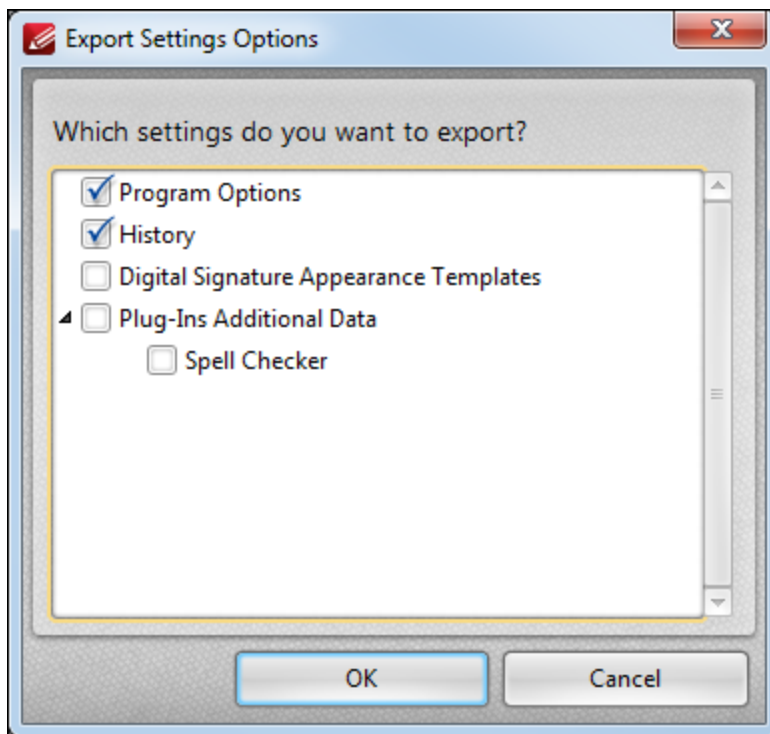
Figure 1. Export Settings Options

- Select the settings to be exported and click **OK** to export them. Click **Cancel** to cancel the process and close the dialog box.

Import Settings

Import Settings

This option imports settings to use with **PDF-XChange Editor.** When it is selected, the **Import Settings from File** dialog box will open. Select the settings to be used and click **OK** to import them. Click **Cancel** to cancel the process and close the dialog box.

Reset Settings

Reset Settings

This option reverts the settings of **PDF-XChange Editor** to their default values.

Preferences

Preferences

When the **Preferences** option is selected, the following dialog box is opens:
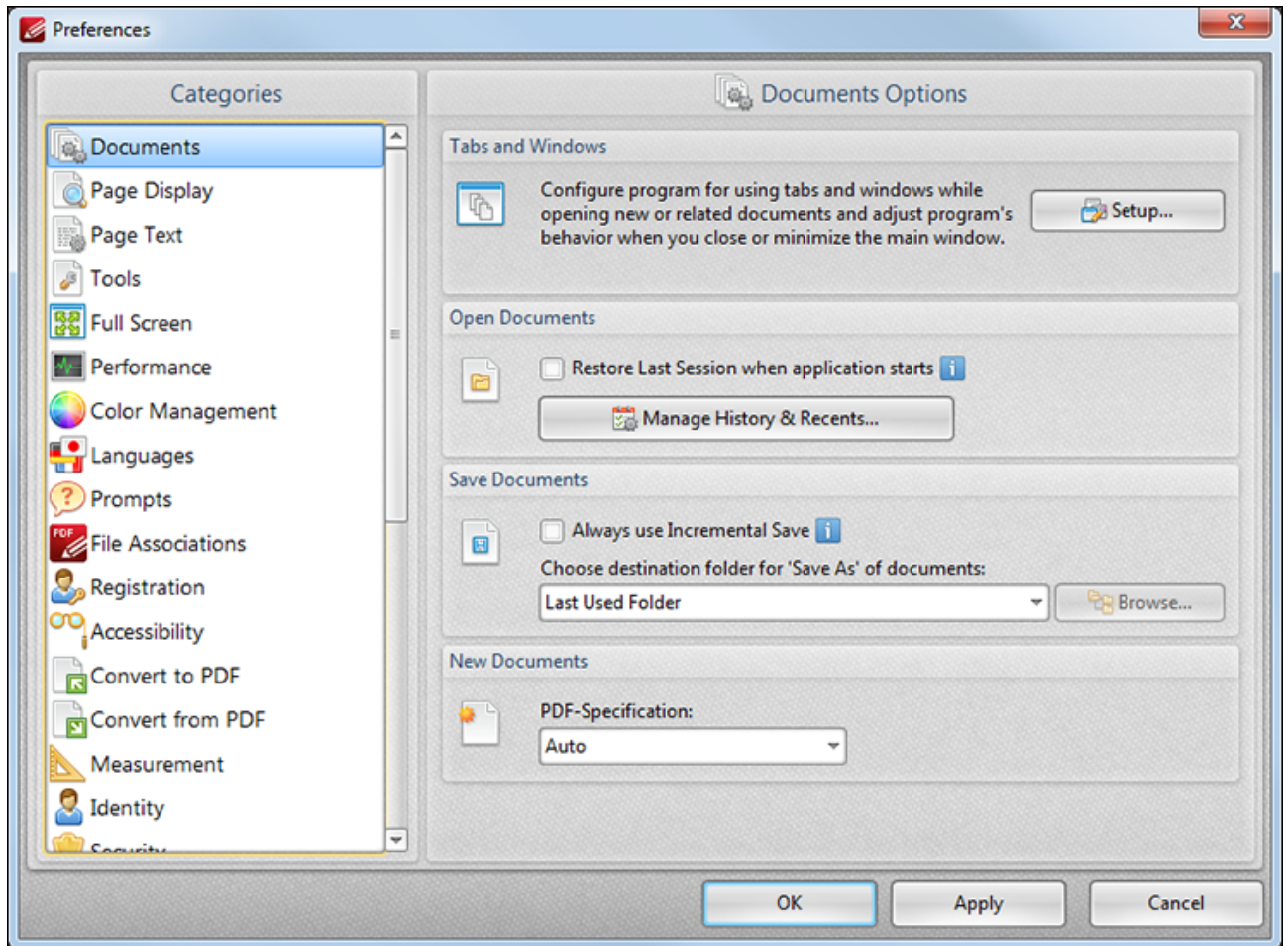
Figure 1. Preferences Dialog Box

These settings are used to determine user preferences within **PDF-XChange Editor.** Use the options in the **Categories** pane to browse to the indicated elements of the software and edit their settings. Click the links below to access information about the settings of each element:

- **Documents** 264

- **Page Display** 266
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Documents

Documents

When the **Documents** tab is selected the following options are available:
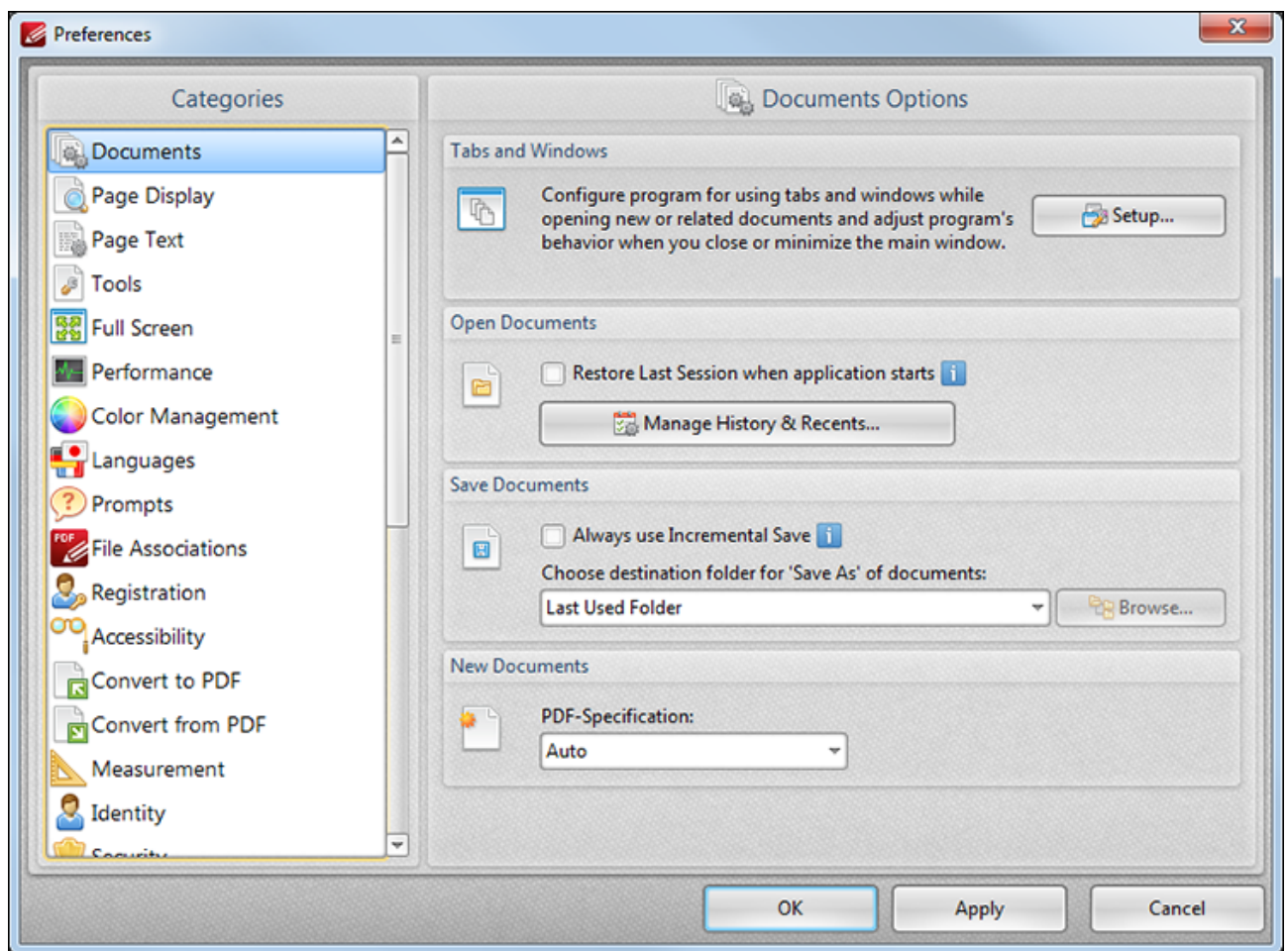
Figure 1. Preferences Dialog Box. Documents Tab Selected

- The **Tabs and Windows** settings determine the parameters for tabs and windows. Click **Setup** to determine these settings.
- The **Open Documents** setting provides the option of restoring the most recent session when **PDF-XChange Editor** is launched. Select the box to enable this option. Click the **Manage History and Recents** button for further settings.

- The **Save Documents** settings determine the parameters for saving documents:
  - Select the **Always use Incremental Save** button to enable incremental saving. This means that the original content and information relating to changes in the document is retained. Enabling this option reduces the time taken to save documents but increases the file size with each save. Incremental save should always be used when digital signatures have been applied to documents and will need to be subsequently verified.
  - Use the **Choose destination folder for 'Save As' of documents** text box to select the folder to which documents will be saved.
- The **New Documents** setting relates to the **PDF-Specification** of new documents. Select an option from the menu.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Page Display

Page Display

When the **Page Display** tab is selected the following dialog box is displayed:
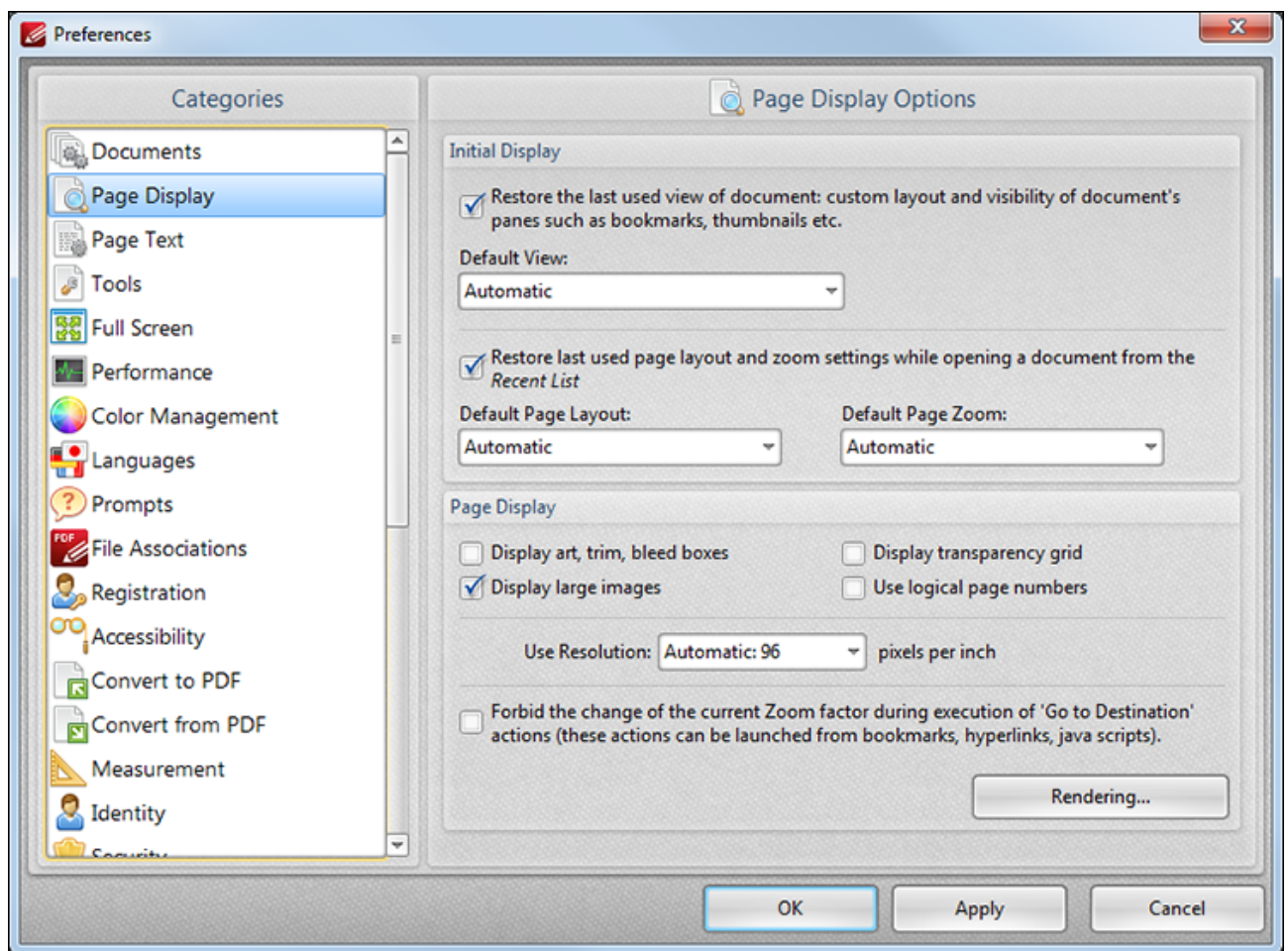
Figure 1. Preferences Dialog Box. Page Display Tab Selected

- The **Initial Display** settings determine the layout of documents when they are opened:
  - Select the indicated check box to restore the most recent display settings.
  - Use the **Default View** menu to select the default viewing parameters for documents.
  - Select the indicated check box to retain the most recently used page layout and zoom settings when opening a recent document.

- Use the **Default Page Layout** and **Default Page Zoom** menus to determine the default layout and zoom settings.

- The **Page Display** settings determine what is displayed on the active page:
  - Select the required check boxes.
  - Select an option from the **Use Resolution** menu to determine the viewing resolution.
  - Select the indicated check box to disable zoom settings when 'Go to Destination' actions are launched.
  - Click the **Rendering** button to determine the rendering settings. The following dialog box will open:
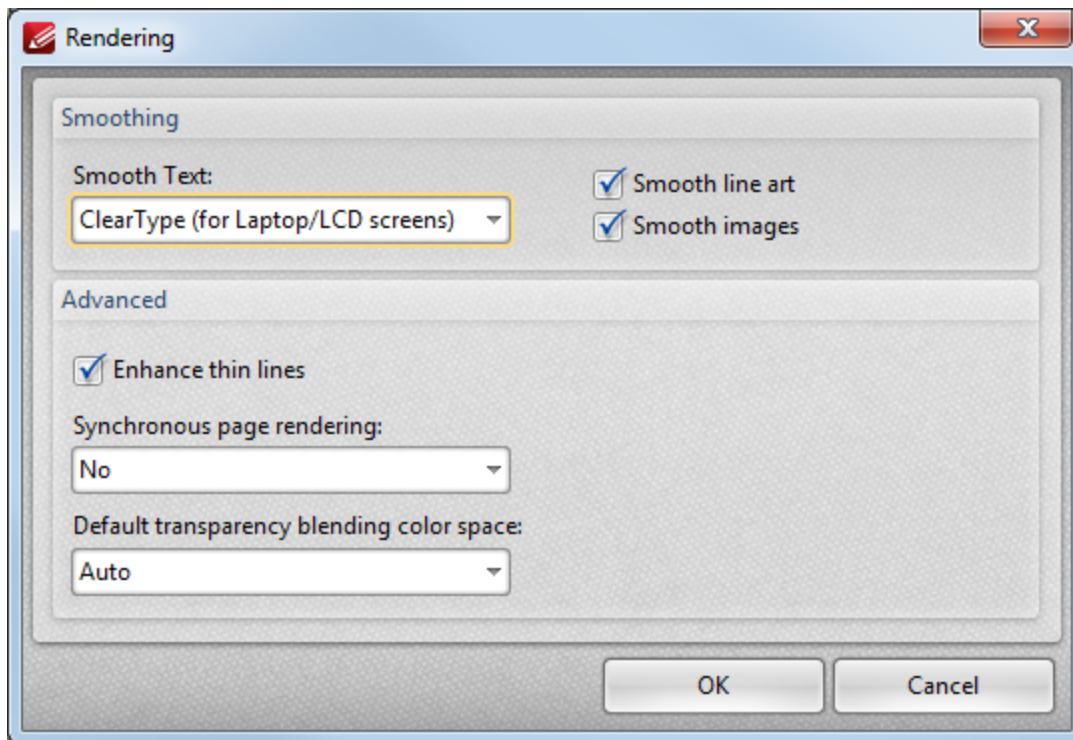
Figure 2. Rendering Dialog Box

- The **Smoothing** options can be used to smooth PDF content and create a softer appearance, but some fine detail may be lost as a result:
  - Select the desired format for smoothing text.
  - Select the **Smooth line art** and **Smooth images** boxes as desired.
- The **Advanced** options determine advanced display settings for color modes and objects
  - Select the **Enhance thin lines box** to repair instances of blurring that may occur when using metric measurements such as point (pt).
  - **Synchronous page rendering** defines the rendering method of pages in the active PDF:
    - **Auto** is the default setting. It means multiple pages are rendered simultaneously in order to optimize smoothness when scrolling. It may also cause the program to wait for the current page to finish rendering before moving onto the next page.

- **No** means pages are rendered only when the current page has finished rendering. This option may cause lag when scrolling through long documents, especially if they contain many objects and images.
- **Yes** means all document pages are rendered simultaneously. This may cause the initial rendering to be slower but ensures lasting smoothness when it is complete.
- Use the **Default transparency blending color space** menu to select the default color space for transparency blending:
  - **Auto** uses RGB color when there is no transparency between intersecting objects and CMYK in cases of transparency.
  - **Working RGB** uses only RBG color space.
  - **Working CMYK** uses only CMYK color space and converts it to RGB when displayed on-screen.
  - **Working Grayscale** uses only grayscale when rendering.

When the desired parameters have been selected, click **OK** to enable them. Click **Cancel** to cancel the process and close the dialog box. Then, in the **Page Display** tab, click **Apply** to apply all changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Page Text

Page Text

When the **Page Text** tab is selected the following options are available:
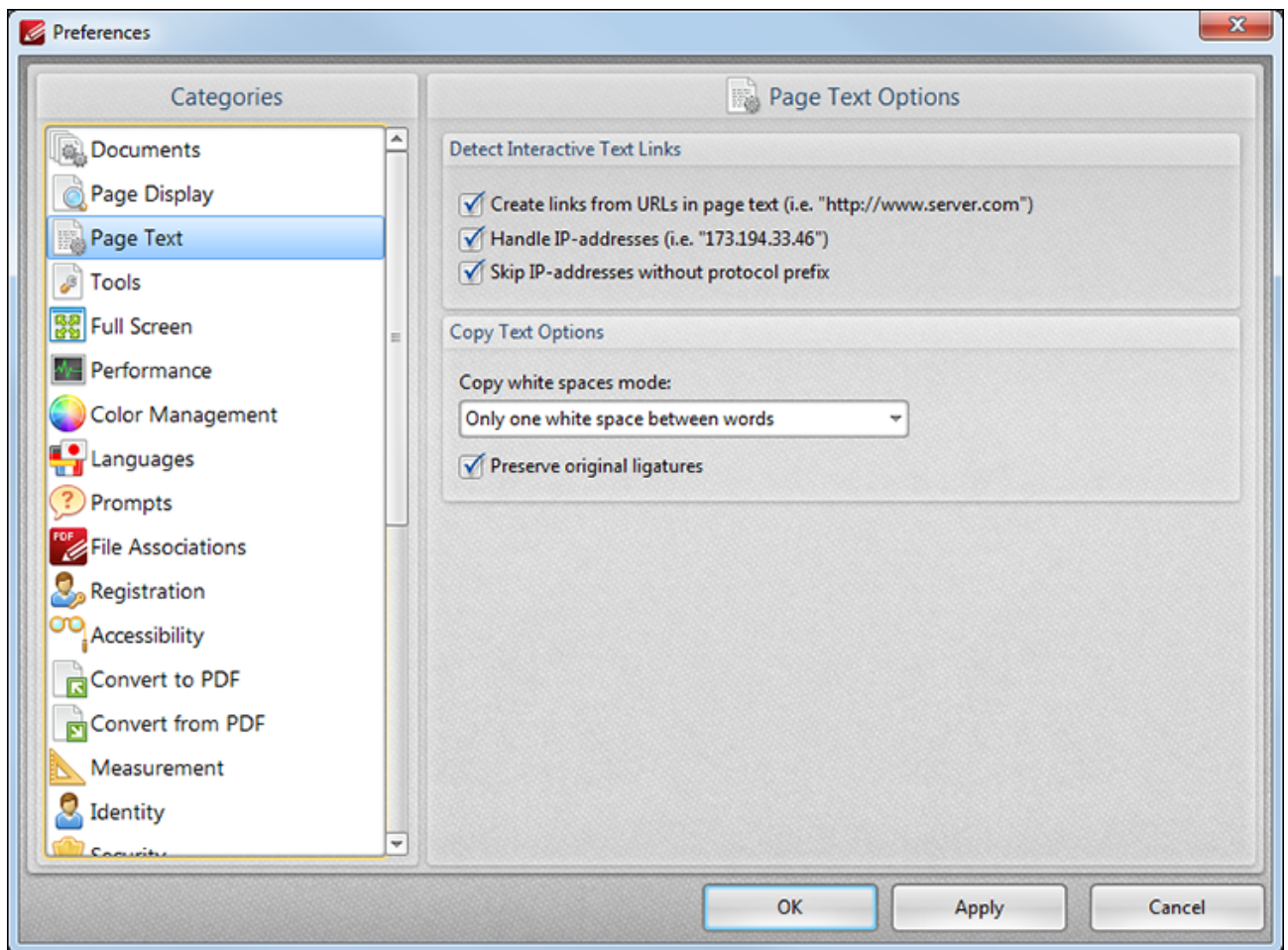
Figure 1. Preferences Dialog Box. Page Text Tab Selected

- The **Detect Interactive Text Links** check boxes determine parameters for interactive text.
- The **Copy Text Options** determine the outcome when text is copied.
- Select the **Preserve original ligatures** box to preserve original ligatures. (Ligatures occur when letters are joined as single glyphs, such as the "æ" grapheme in English). If this box is cleared then ligatures may be created from their individual parts instead.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Tools

Tools

When the **Tools** tab is selected the following options are available::
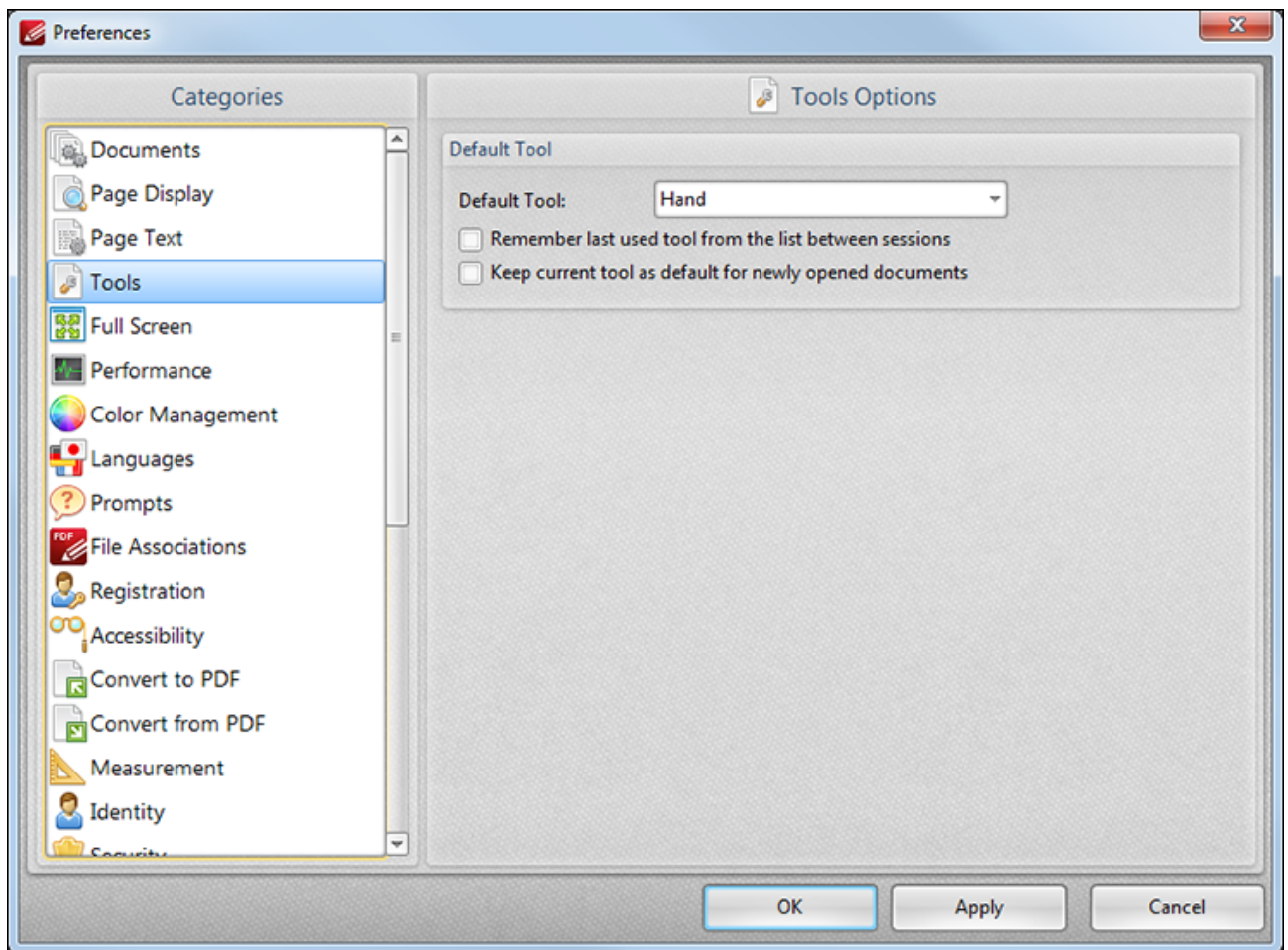
Figure 1. Preferences Dialog Box. Tools Tab Selected

- Use the **Default Tool** menu to select the default tool when documents are opened.
- Alternatively, select a check box to determine the tool.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Full Screen

Full Screen

When the **Full Screen** tab is selected the following options are available::
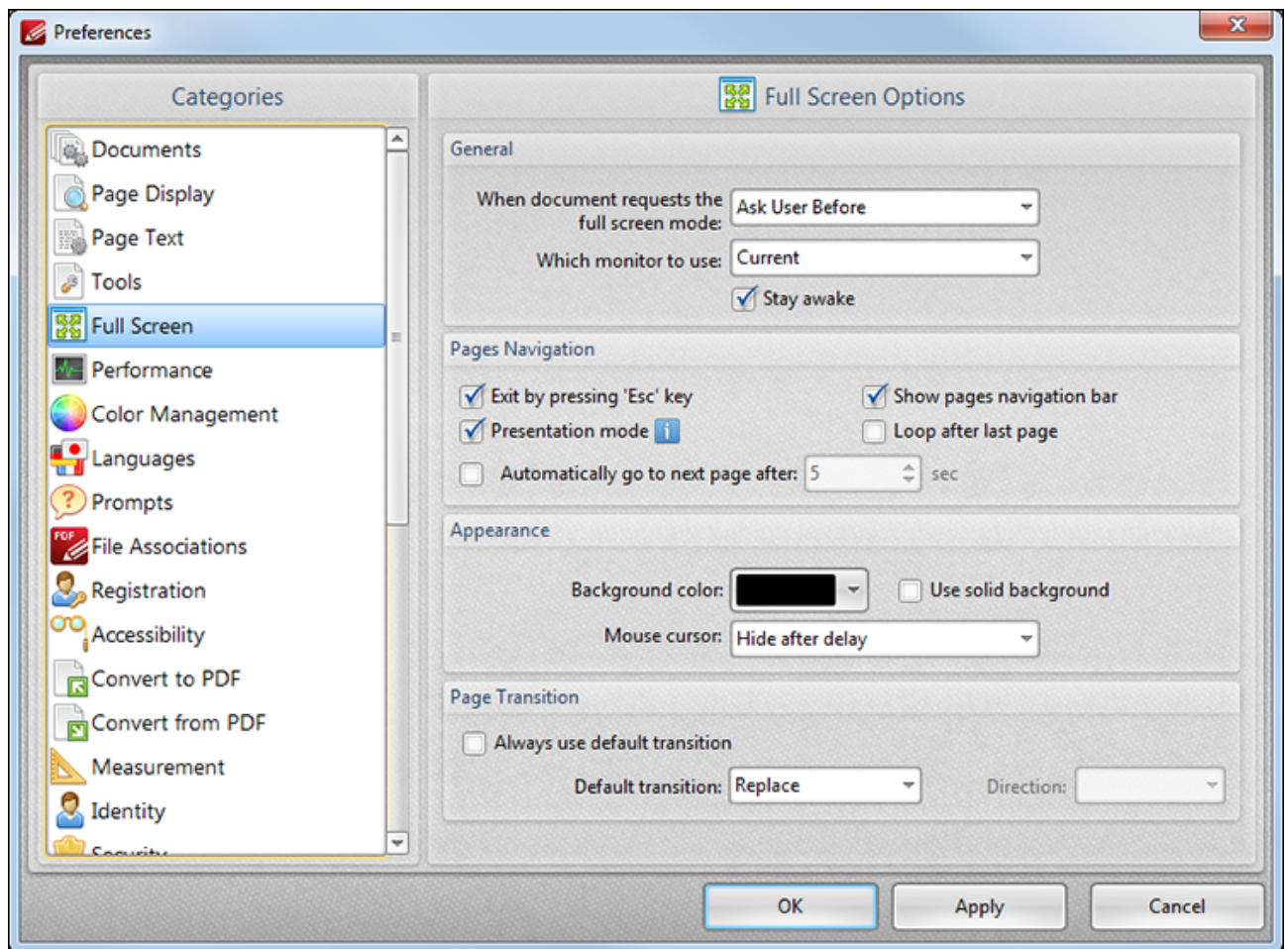
Figure 1. Preferences Dialog Box. Full Screen Tab Selected

- The **General** settings determine how documents are displayed when they are opened:
  - Select the desired options from the full screen mode and monitor menus.
  - Select the **Stay awake** box to prevent the computer from going into screensaver/sleep/hibernate mode.

- The **Pages Navigation** settings determine the navigation parameters:
  - Select the desired boxes to enable their features.
  - Select the **Automatically go to the next page after** box to enable the automatic page browsing feature. Enter a value in number box to determine the browsing rate.

- The **Appearance** settings determine further options of the display:
  - Select a background color from the menu.
  - Select the **Use solid background** box as desired.
  - Select an option from the **Mouse Cursor** menu to determine the mouse cursor settings.

- The **Page Transition** settings determine the transition settings.
  - Select the **Always use default transition** box to use the transition determined in the menu below.
  - Select an option from the **Default Transition** menu. When an option has been selected, further options will become available in the **Direction** menu.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Performance

 Performance

When the **Performance** tab is selected the following options are available:
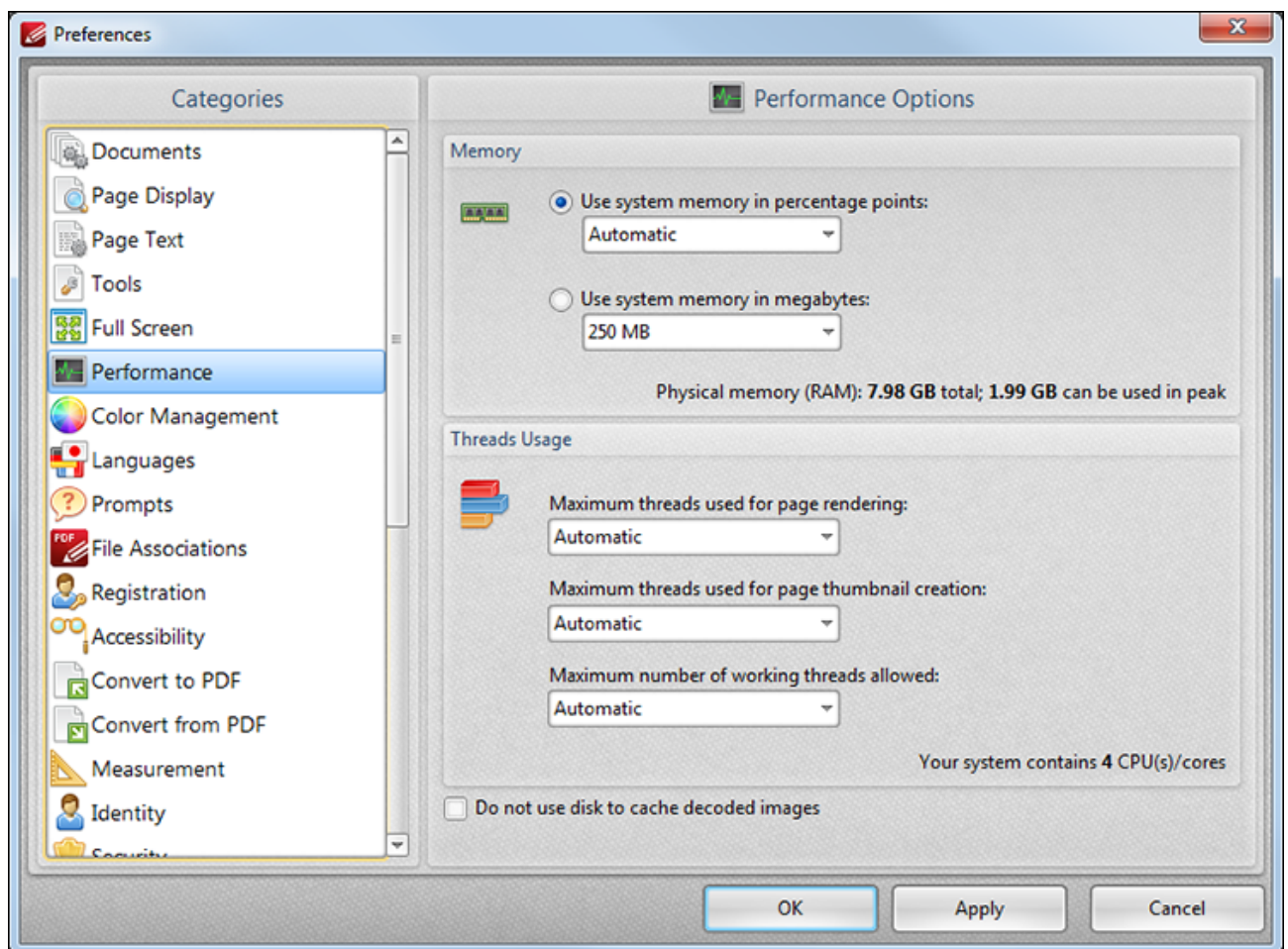
Figure 1. Preferences Dialog Box. Performance Tab Selected

- The **Memory** settings feature two parameters that determine how much memory **PDF-XChange Editor** uses:
    - Select an option from the **Use system memory in percentage points** menu to set memory usage to automatic or one of the listed percentages.

- Select an option from the **Use system memory in megabytes** menu to set memory usage in megabytes.
- When using either of the above options, it should be noted that increasing memory usage will improve the application's performance but may impact overall system performance.

- The **Threads Usage** settings determine how many threads are used at specific moments within the application's software:
  - Select an option from the menus to determine how many threads are used for **page rendering** and **thumbnail creation,** and the **maximum number of working threads allowed.**
  - Select the **Do not use disk to cache decoded images** box as desired.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Color Management

When the **Color Management** tab is selected the following options are available:
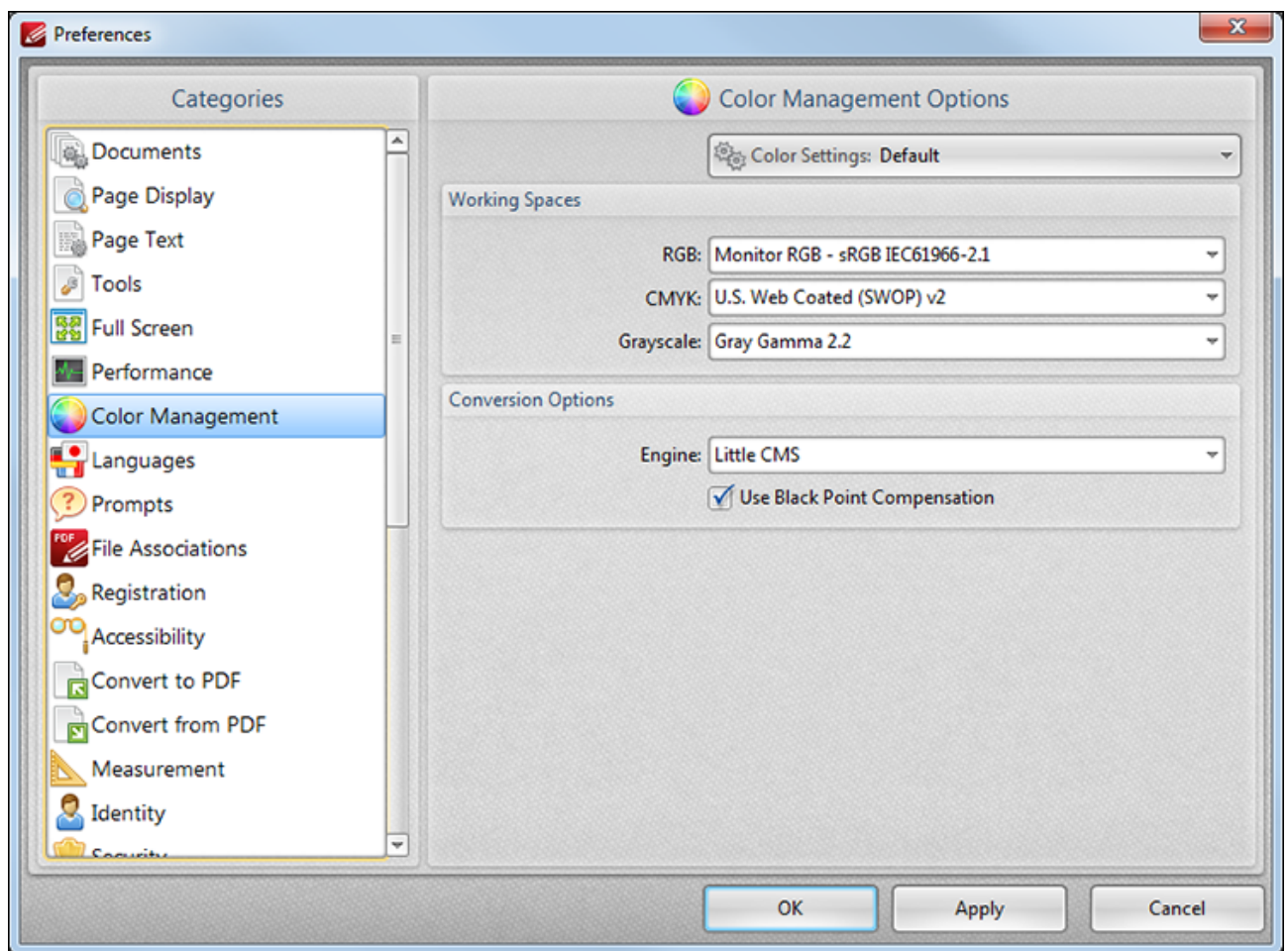
Figure 1. Preferences Dialog Box. Color Management Tab Selected

- Select an option from the **Color Settings** menu as desired. When customized details have been entered in the **Working Spaces** and **Conversion Options** sections this menu can be used to save them for subsequent use. Click **Save Current Settings** to save settings for subsequent use. Click **Delete** to delete the profile currently selected. Click **Manage** to edit or clone profiles.

- There are three settings in the **Working Spaces** section. These apply to images saved with various color options. Select the desired settings from the menus.
- There is one setting in the **Conversion Options** section. This determines which engine is used for color space conversion. **Little CMS** is the only option.
- Select the **Use Black Point Compensation** box as desired.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Languages

Languages

When the **Languages** tab is selected the following options are available:
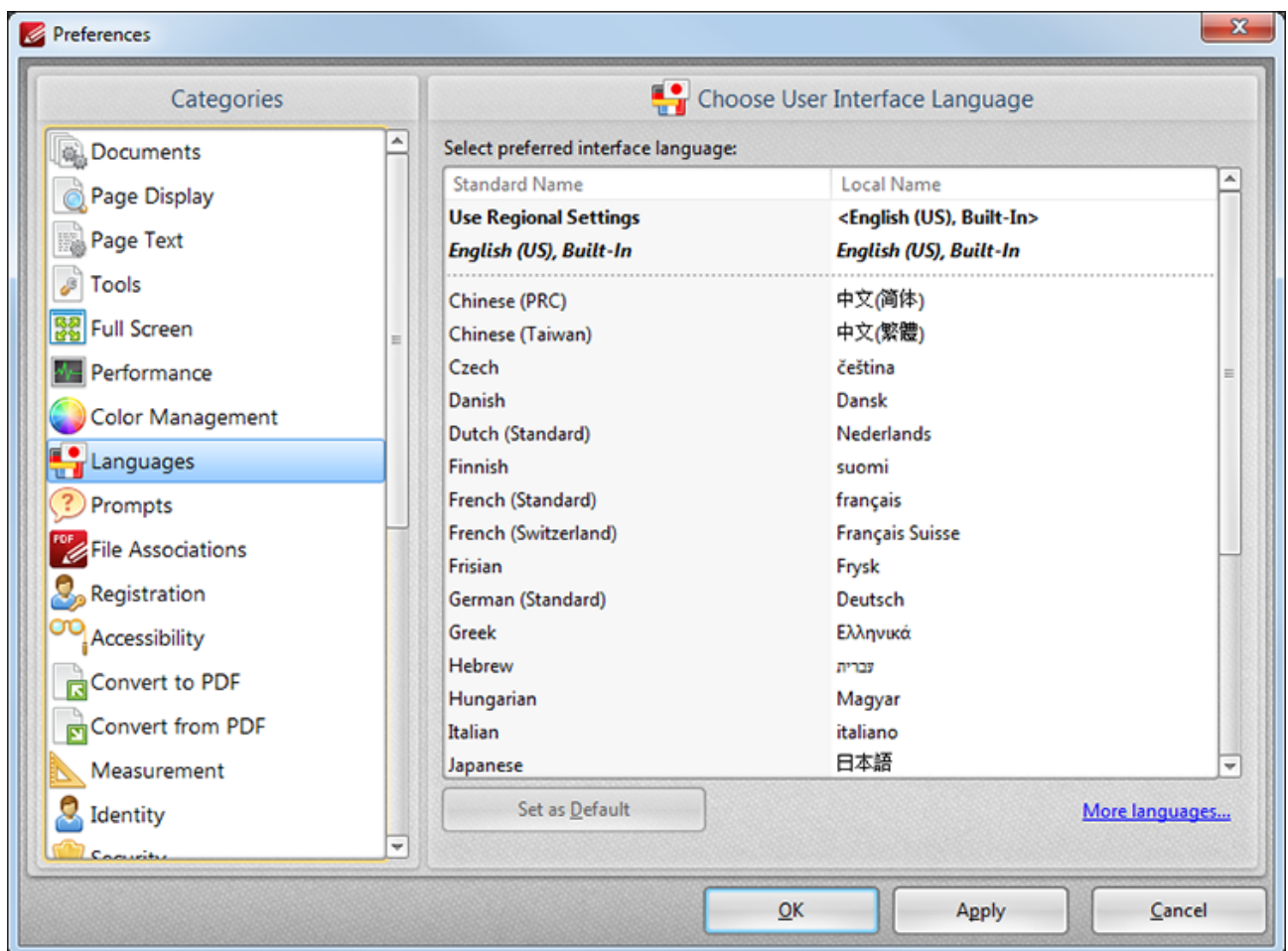
Figure 1. Preferences Dialog Box. Languages Tab Selected

- Select a language for the user interface. Click the **Set as Default** button to set the selected language as the default language.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Prompts

Prompts

When the **Prompts** tab is selected the following options are available:
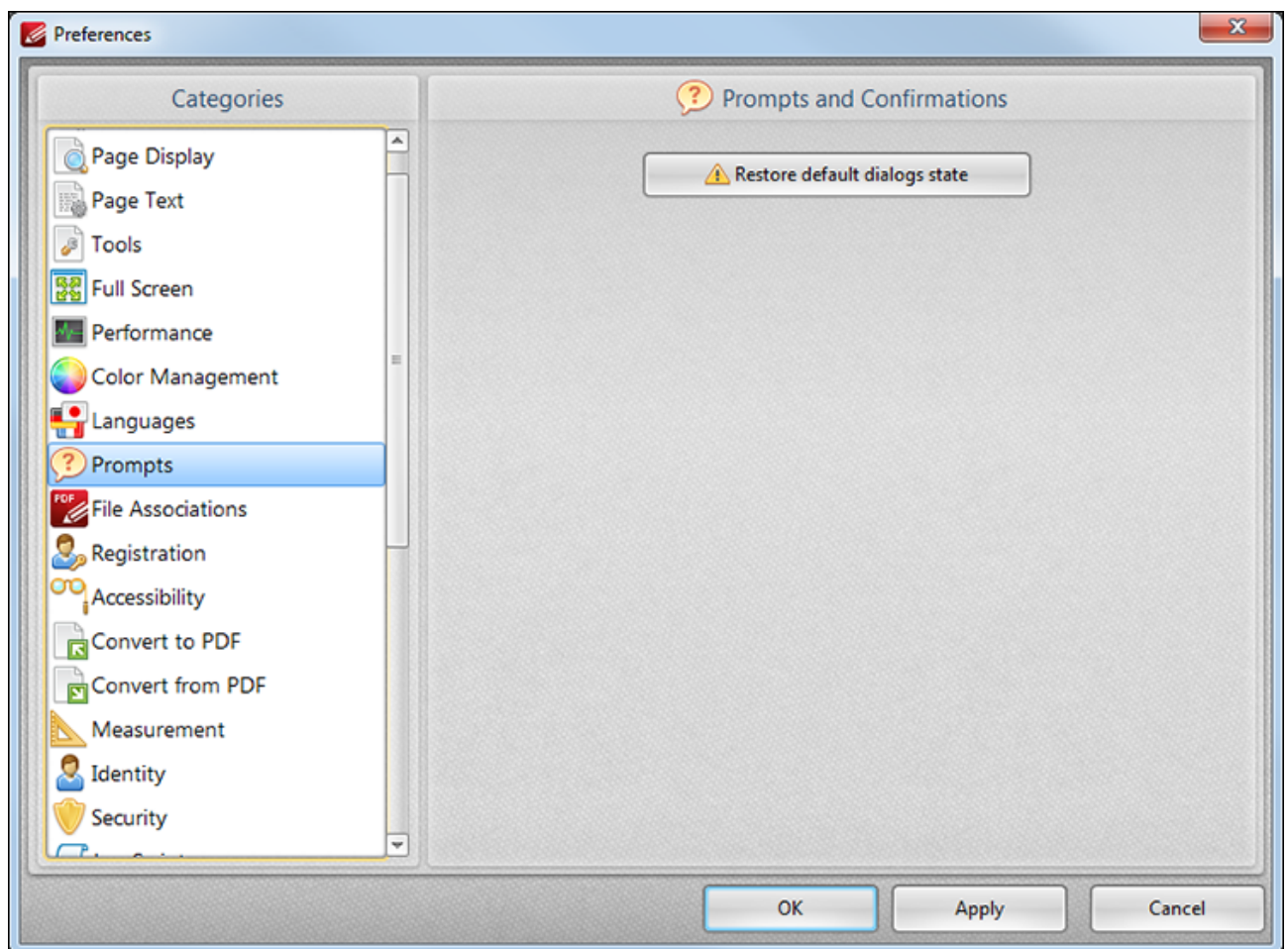
Figure 1. Preferences Dialog Box. Prompts Tab Selected

- Click the **Restore default dialogs state** button to revert all dialogs to their default state. This will also restore any warning message check boxes within **PDF-XChange Editor** that have been selected to not appear again.

Click **Apply** to apply to restore default dialogs. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

File Associations

File Associations

When the **File Associations** tab is selected the following options are available:
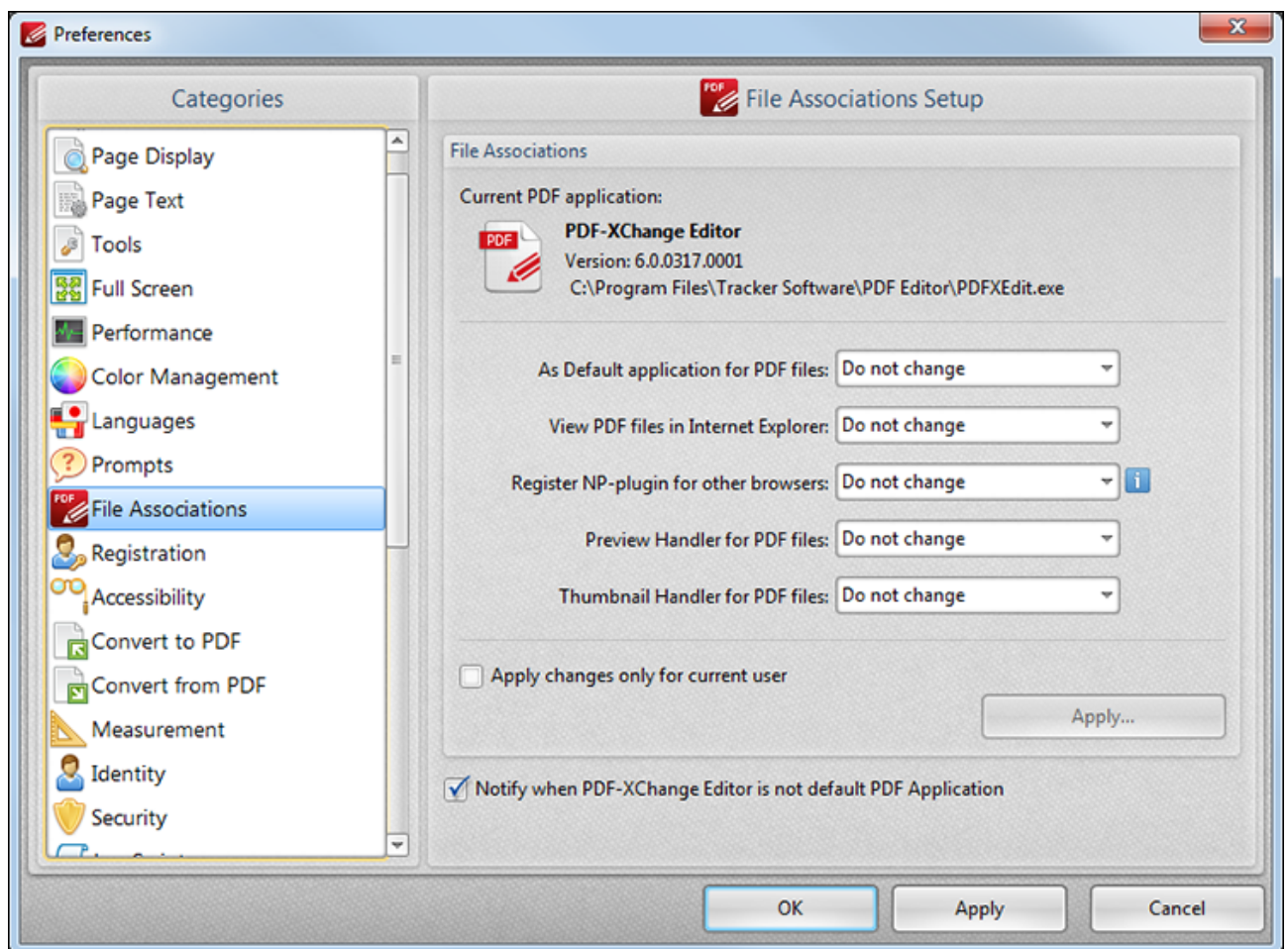
Figure 1. Preferences Dialog Box. File Associations Tab Selected

Windows uses file associations to identify files to be used with specific programs. (Please note that file associations can also be determined using the **Control Panel** of the local computer).

- The current PDF viewing/editing application is shown at the top of the dialog box. **PDF-XChange Editor** is the current application in *(figure 1).*

- The menus that follow determine when the current application is used:
  - The **As Default application for PDF files** menu has three options:
    - **Do not change** retains the existing file associations.
    - **Make Default** sets the current application as the default application.
    - **Restore** implements the previous default application that was used for PDF files.
  - The remaining four menus have three options:
    - **Do not change** retains the existing file associations.
    - **Yes** enables the current application for the option in question.
    - **No** disables the current application for the option in question.
  - Select the **Apply changes only for current user** box as desired. When this option is selected, click **Apply** to apply changes.
  - The **Notify when PDF-XChange Editor is not default PDF Application** box is selected by default. Clear the box to disable notifications.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Registration

Registration

When the **Registration** tab is selected the following options are available:
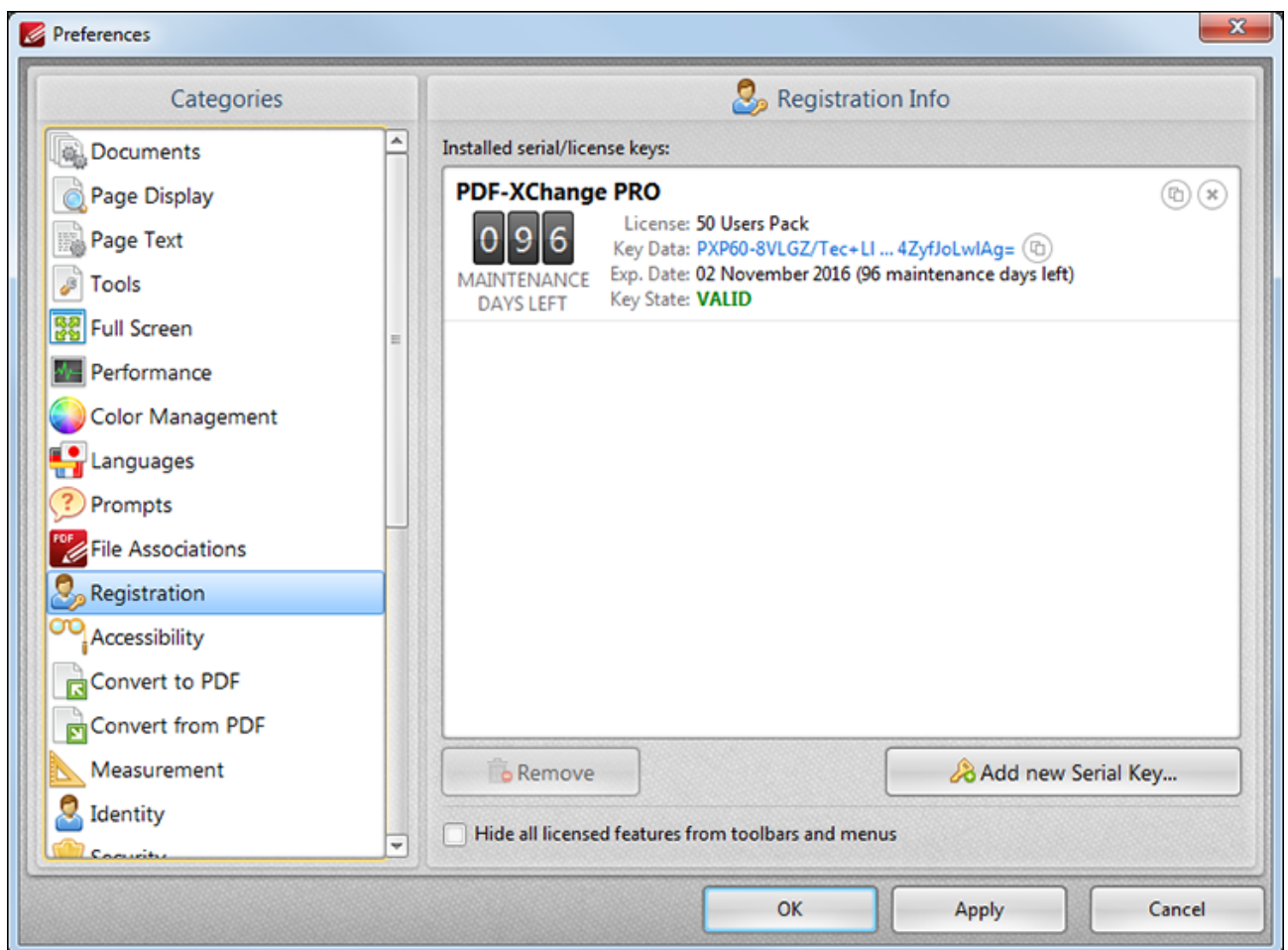
Figure 1. Preferences Dialog Box. Registration Tab Selected

The **Registration** tab is used to register/edit serial keys for **PDF-XChange Editor.** Current versions and their details are shown in the dialog box, as in *(figure 1).*

- Click the **Remove** button to remove serial keys currently installed.
- Click the **Add new Serial Key** button to add a new serial key.
- Select the **Hide all licensed features from toolbars and menus** box as desired.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Accessibility

Accessibility

When the **Accessibility** tab is selected the following options are available:
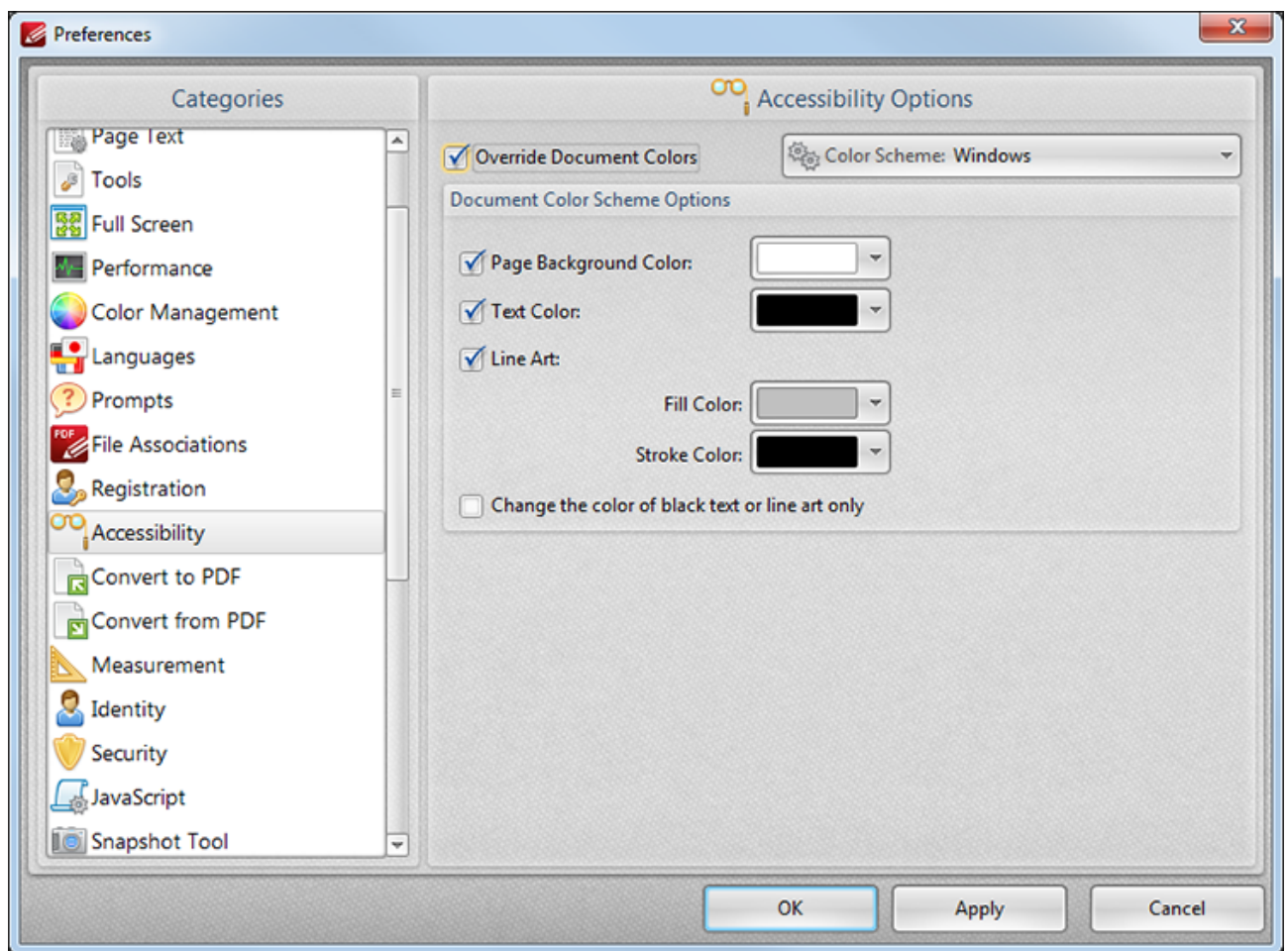
Figure 1. Preferences Dialog Box. Accessibility Tab Selected

The **Accessibility** tab is used to control the color options of PDF documents. This improves the usability for the visually impaired.

- Select the **Override Document Colors** box to enable further options.
- Select colors.

- Select the **Change the color of black text or line art only** box to apply changes to text and line art that appears as black on white only.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Convert to/from PDF

Convert to/from PDF

When the **Convert to PDF** tab is selected the following options are available:
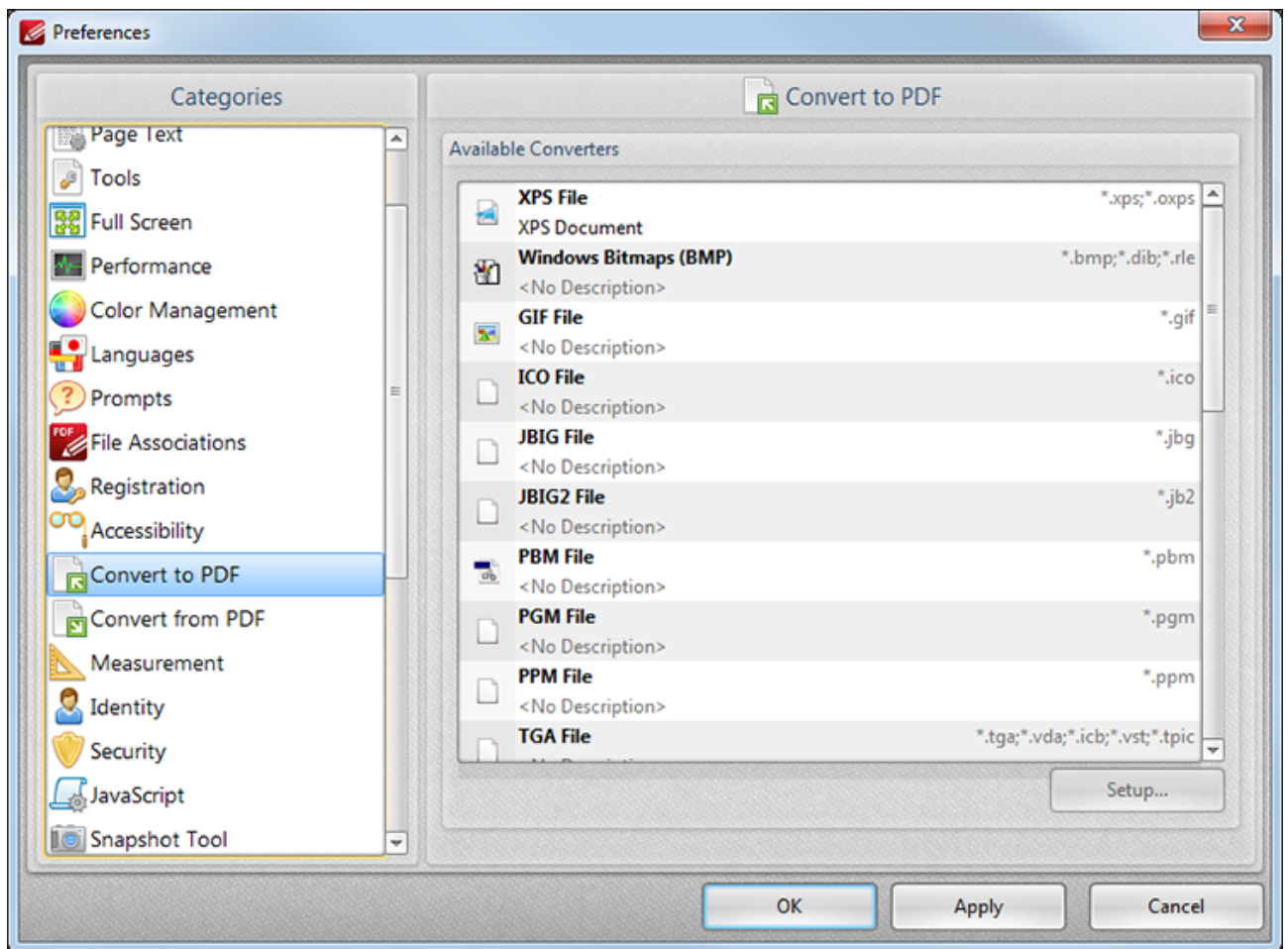
Figure 1. Preferences Dialog Box. Convert to PDF Tab Selected

This option shows the file formats that can be converted to PDF format. When formats have further options the **Setup** button is enabled. Click it to determine these options.

The options in **Convert from PDF** tab are the same as those detailed above but they are used when converting from PDF format.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Measurement

Measurement

When the **Measurement** tab is selected the following options are available:
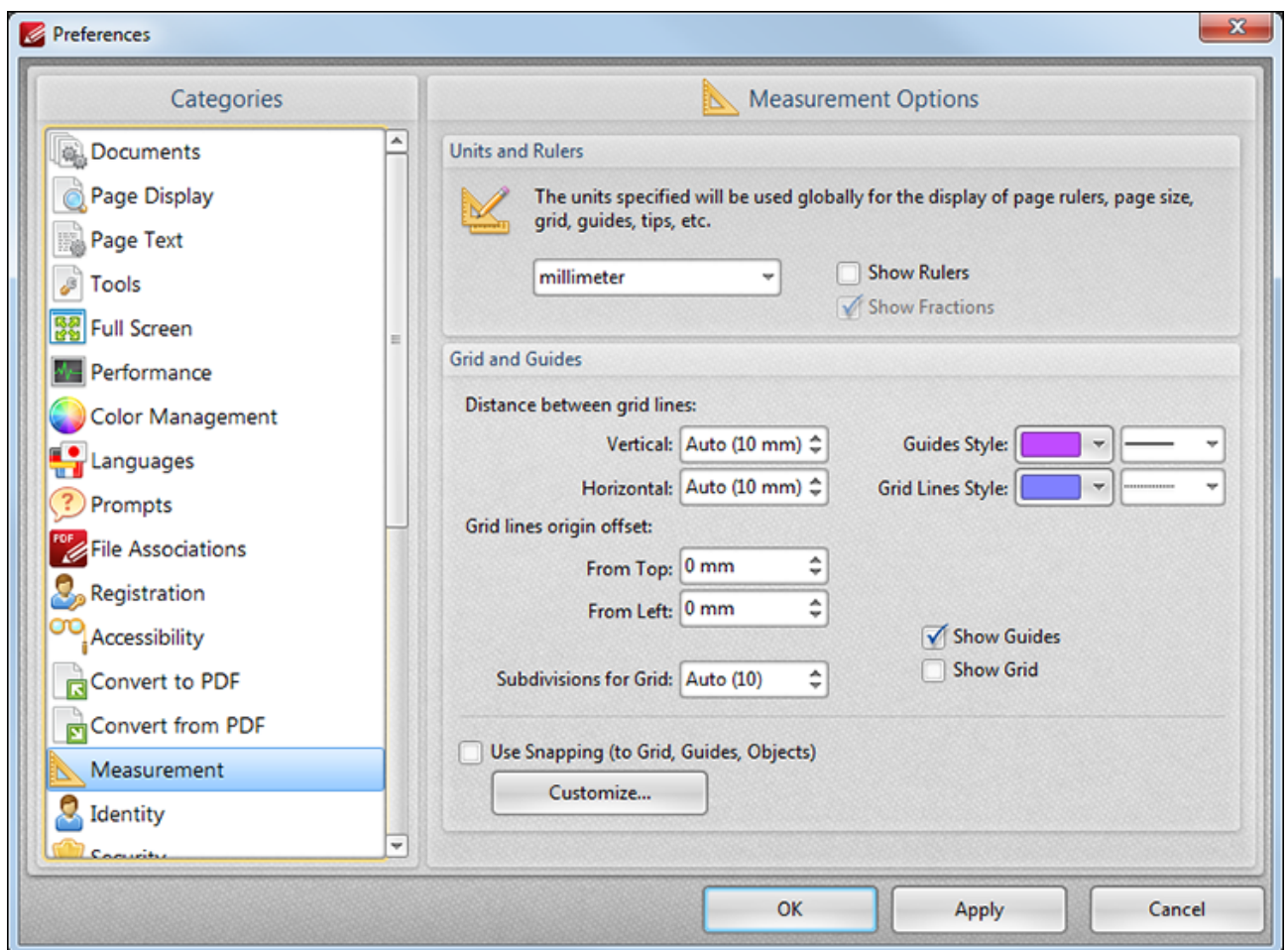
Figure 1. Preferences Dialog Box. Measurement Tab Selected

These options determine the settings for units of measurement and certain layout options.

- Select an option from the units menu to determine the units of measurement within documents.
- Select the **Show Rulers** box to make rulers visible within documents.

- Select the **Show Fractions** box to make fractions visible within documents.
- Use the **Grids and Guides** section to determine the layout and color of grids within documents. Grids provide a visual reference for aligning objects within documents.
- Select the **Use Snapping** box to enable snapping. Click the **Customize** button to customize the snapping parameters. The following dialog box will open:
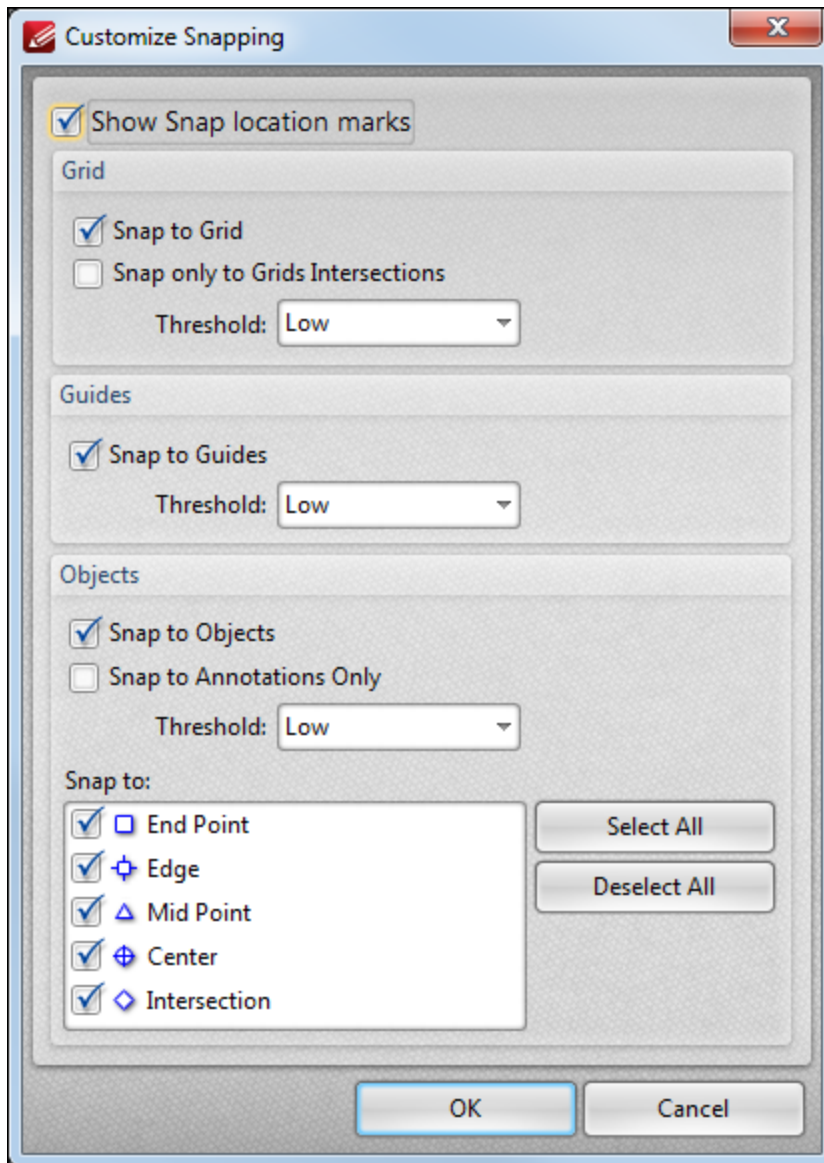
Figure 2. Customize Snapping Dialog Box

- Select the **Show Snap location marks** box as desired.
- Use the **Grid** settings to determine how objects in the document interact with grids:
  - Select the **Snap to Grid** box to align objects with the nearest grid line when they are moved.
  - Select the **Snap only to Grids Intersections** box to align objects only to the intersection of grids.

- Select the **Snap to Guides** box to snap objects to guide lines when they are moved.
- Use the **Threshold** menu to determine the level of sensitivity for guide lines.
- Use the **Objects** settings to determine how shapes in the document interact with objects:
  - Select the **Snap to Objects** box to align shapes with other objects.
  - Select the **Snap to Annotations Only** box as desired.
  - Use the **Threshold** menu to determine the level of sensitivity for objects.
- Select the check boxes in the **Snap to** menu to determine at which points snapping is enabled for objects.

When the desired settings have been entered, click **OK** to save. Then, in the **Preferences** dialog box, click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Identity

Identity

When the **Identity** tab is selected the following options are available:
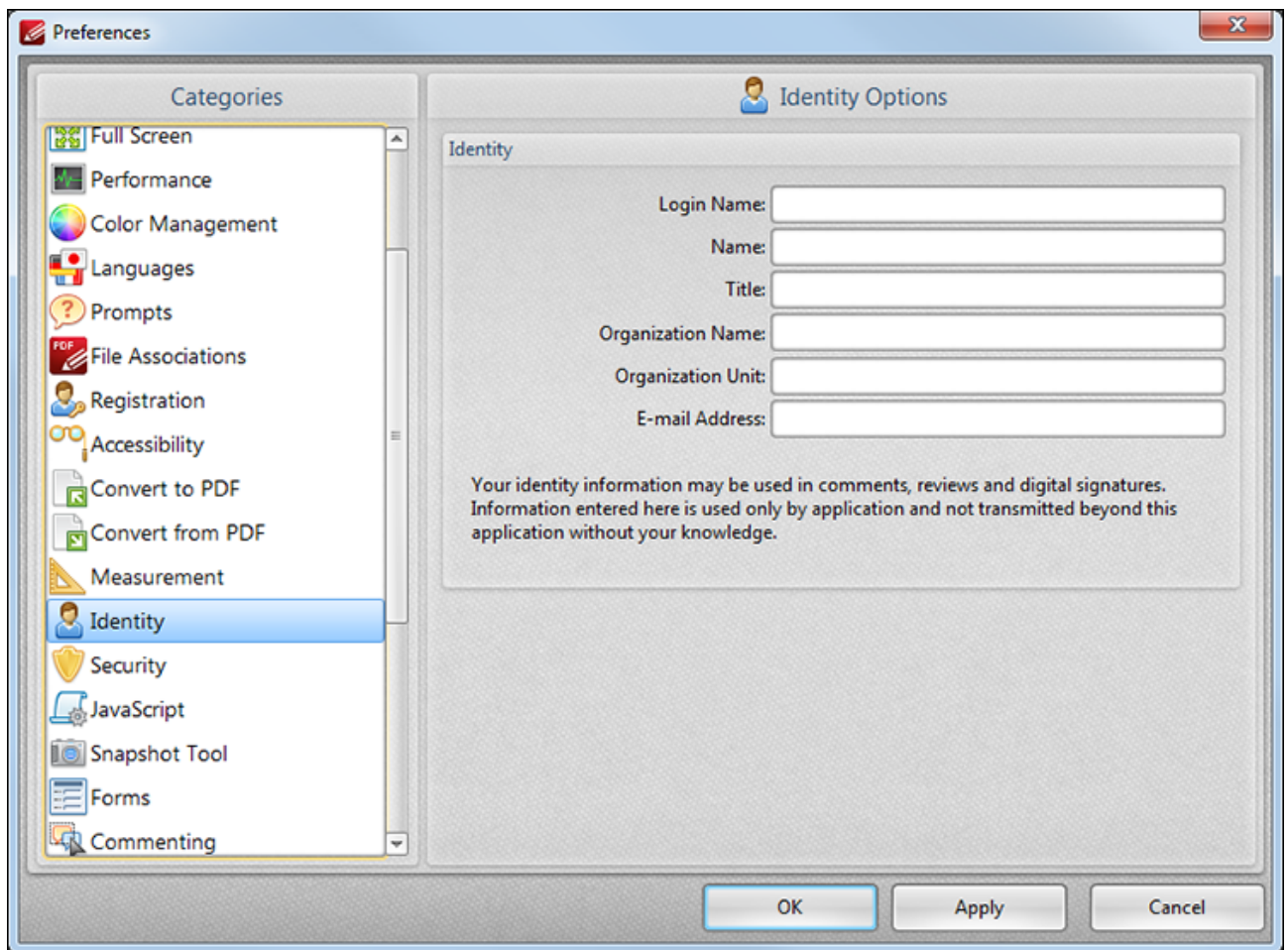
Figure 1. Preferences Dialog Box. Identity Tab Selected

The **Identity** settings are used to store frequently-used information about the user and can be added to PDF documents subsequently. Enter the desired details into the text boxes.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Security

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Security

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When the **Security** tab is selected the following options are available:
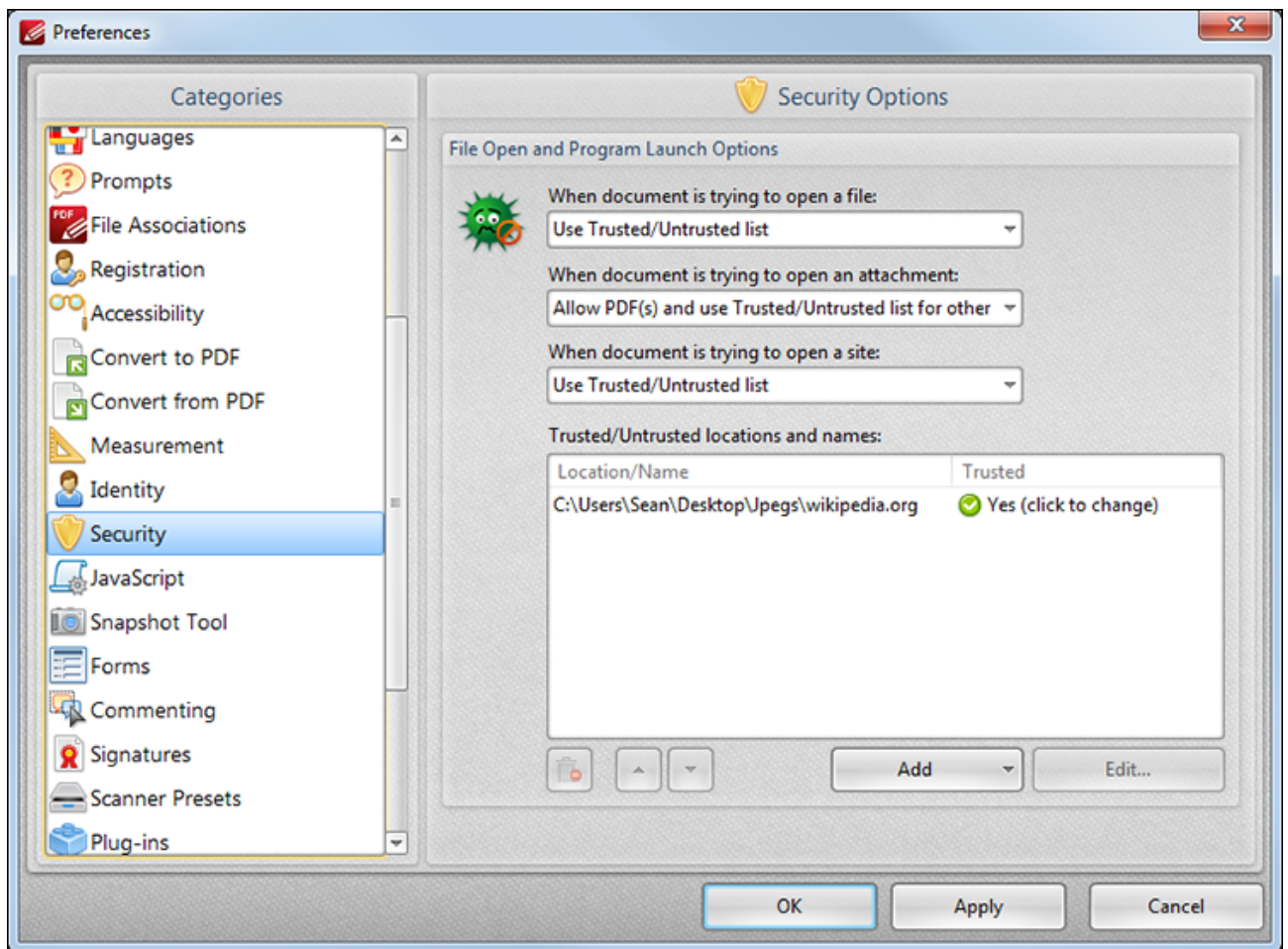
Figure 1. Preferences Dialog Box. Security Tab Selected

The **Security** settings are used to determine the actions that **PDF-XChange Editor** takes at specific moments during operation:

- There are four options when the software is opening a file or an attachment:

- **Use Trusted/Untrusted list,** which can be specified using the **Trusted/Untrusted locations and names** text box. If the file/attachment is not specified then **PDF-XChange Editor** will prompt before opening.
  - **Prevent it,** which prevents all files and attachments from being opened.
  - **Allow it,** which allows all files and attachments to be opened.
  - **Allow PDF(s) and use Trusted/Untrusted list for other,** which allows all PDF files/attachments to be opened and refers to the **Trusted/Untrusted list** for other formats. If unspecified in the list then **PDF-XChange Editor** will prompt before opening the file/attachment.

- There three four options when the software is opening a site:
  - **Use Trusted/Untrusted list,** which can be specified using the **Trusted/Untrusted locations and names** text box. If the site is not specified then **PDF-XChange Editor** will prompt before opening.
  - **Prevent it,** which prevents all sites from opening.
  - **Allow it,** which allows all sites to be opened.

Use the **Trusted/Untrusted locations and names** window to determine trusted and untrusted elements. Click **Add** to add new elements. The following menu will be displayed:
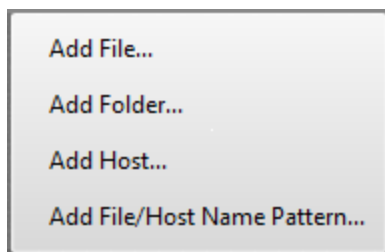
Figure 2. Add Trusted/Untrusted Options

- Click **Add File** to launch the **Add File** dialog box and add files from the local computer.
- Click **Add Folder** to launch the **Add Folder** dialog box and add folders from the local computer.
- Click **Add Host** to launch the **Add New Trusted/Untrusted Item** dialog box. Enter the internet address of the desired host and select **Trusted** or **Untrusted** as required. Then click **OK** to save the host.
- Click **Add File/Host Name Pattern** to specify a text pattern as either **Trusted** or **Untrusted.** Text patterns can include any text but are intended for use with file extensions.
- When trusted/untrusted locations and names are selected in the list, click **Edit** to edit their details.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

JavaScript

 JavaScript

When the **Javascript** tab is selected the following options are available:
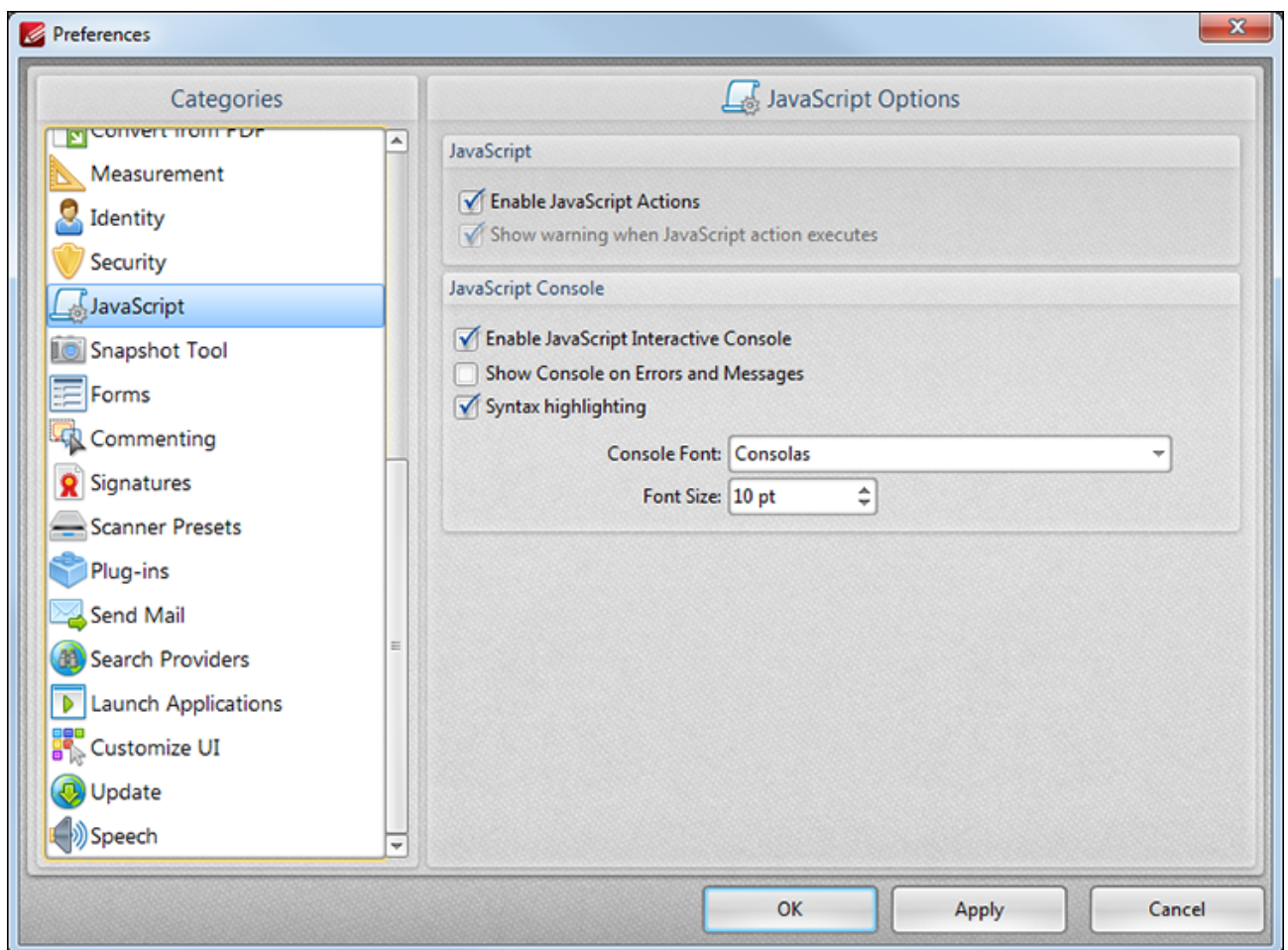
Figure 1. Preferences Dialog Box. Javascript Tab Selected

These settings determine the **Javascript** options in **PDF-XChange Editor:**

- Select the check boxes as desired in the **Javascript** section.
- Select the **Enable Javascript Interactive Console** box to permit the user to view embedded javascript and execute javascript commands.

- Select the **Show Console on Errors and Messages box** to activate the console when an activated javascript encounters errors.
- Use the **Console Font** and **Font Size** menus to determine font settings in the javascript console.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Snapshot Tool

Snapshot Tool

The **Snapshot Tool** is used to take snapshots of the active document. When it is enabled, click a page to take a screenshot. Alternatively, click and drag the pointer to select a custom rectangular area of the document. Release the button to take the snapshot. When a snapshot is taken, a bitmap copy of the selection is pasted to the clipboard.

When the **Snapshot Tool** tab is selected the following options are available:
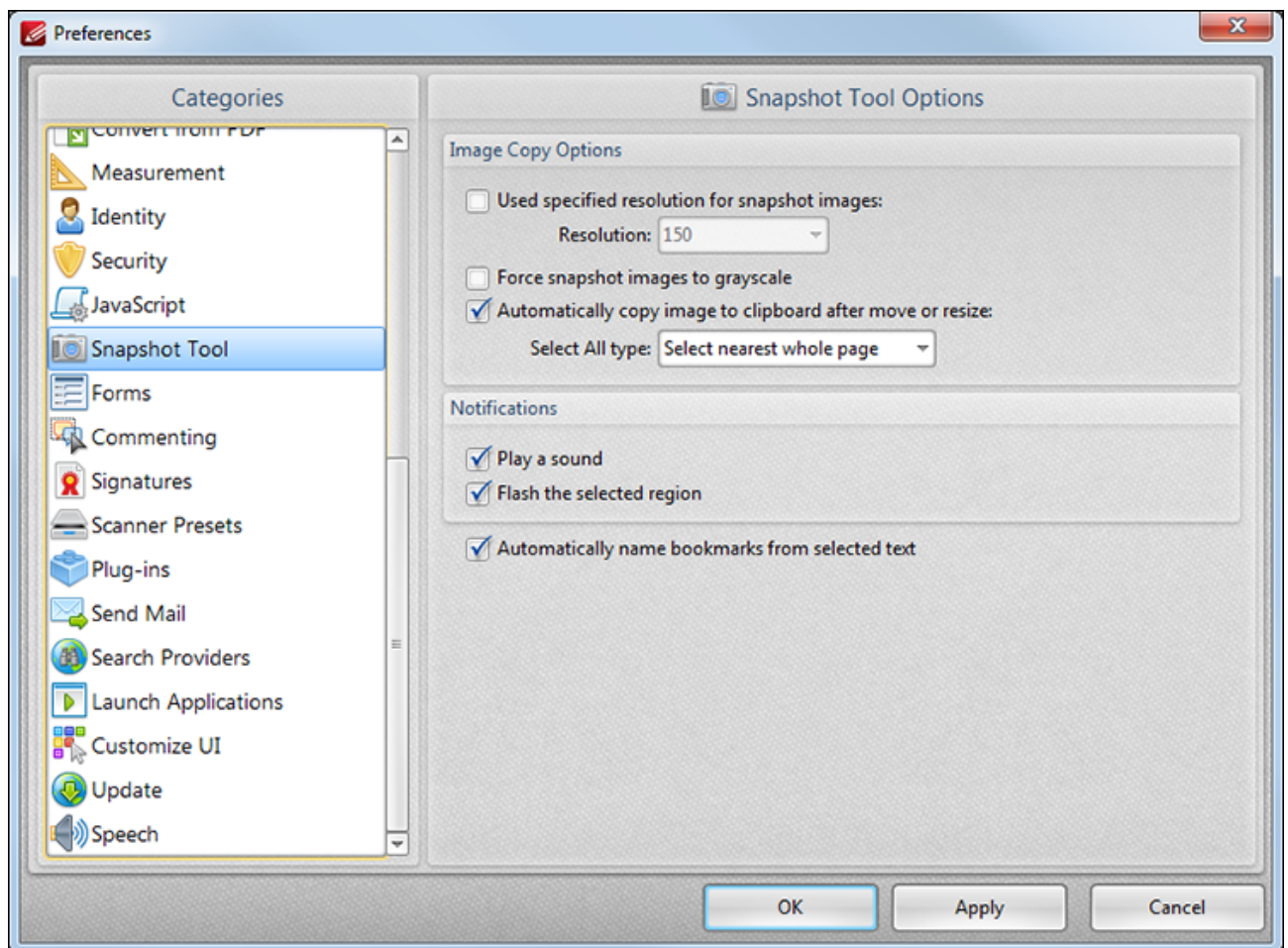
Figure 1. Preferences Dialog Box. Snapshot Tool Tab Selected

The **Image Copy Options** determine the settings for images that the Snapshot tool produces:

- Specify a resolution for images using the **Resolution** menu.
- Select the **Force snapshot images to grayscale** box as desired.
- Select the **Automatically copy image to clipboard after move or resize** box as desired.
- Use the **Select All type** menu to determine the **Select All** setting.
- Select the check boxes in the **Notifications** section to enable the features indicated.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Forms

Forms

When the **Forms** tab is selected the following options are available:
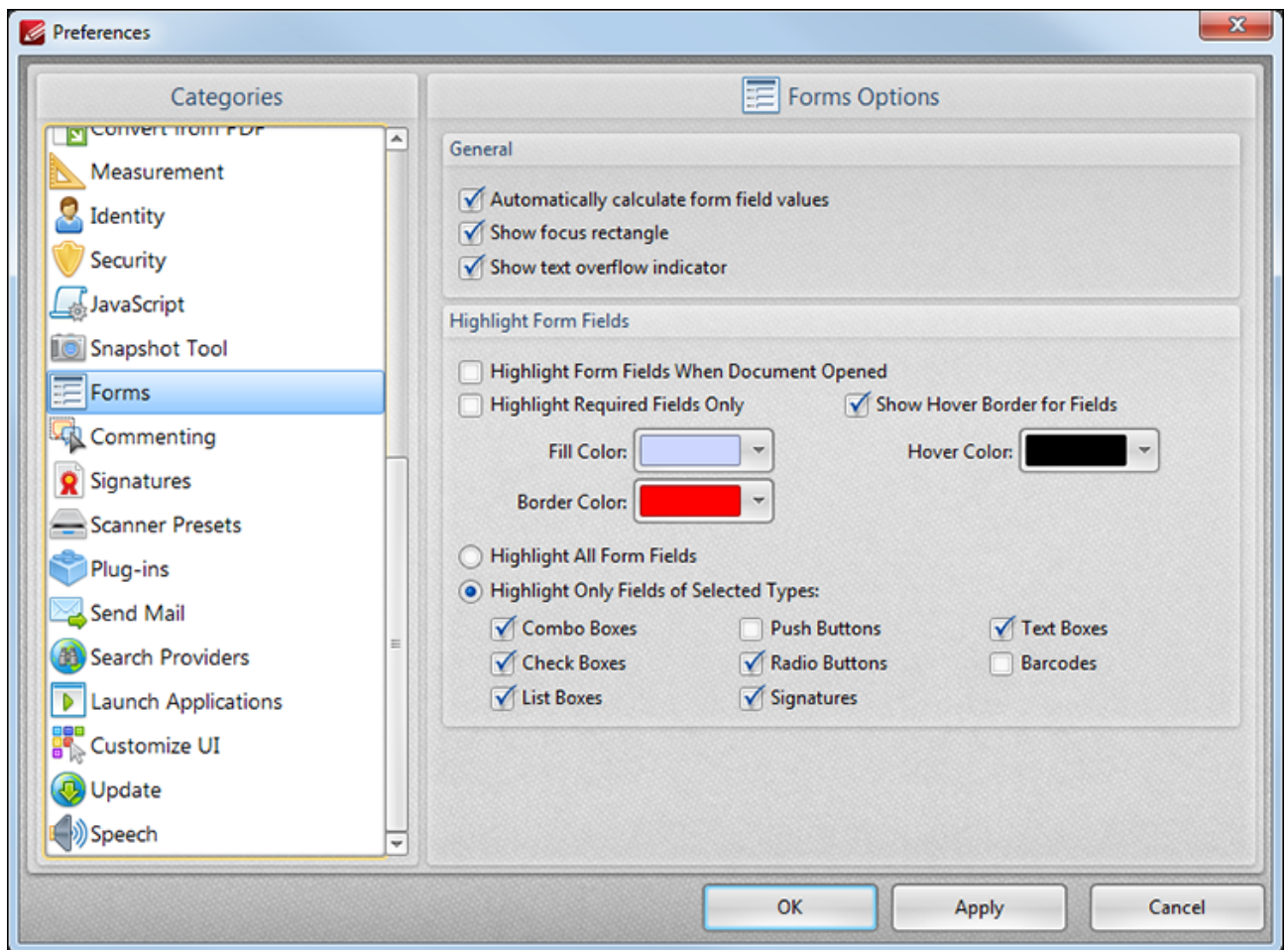
Figure 1. Preferences Dialog Box. Forms Tab Selected

These settings determine the options for forms within **PDF-XChange Editor.** The options in the **General** tab are as follows:

- Select the **Automatically calculate form field values** box for form field calculations to be performed automatically when they are entered.

- Select the **Show focus rectangle** box to highlight the form field that currently has focus.
- Select the **Show text overflow indicator** box as desired.

The options in the **Highlight Form Fields** section are as follows:

- Select the **Highlight Form Fields When Document Opened** box as desired.
- Select the **Highlight Required Fields Only** box as desired. Required fields can be determined here. 486
- Select the **Show Hover Border for Fields** box as desired.
- Select colors as the **Fill Color, Border Color** and **Hover Color**.
- Select the **Highlight All Form Fields** option button as desired.
- Alternatively, select the **Highlight Only Fields of Selected Types** option button and select the relevant boxes.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Commenting

Commenting

When the **Commenting** tab is selected the following options are available:
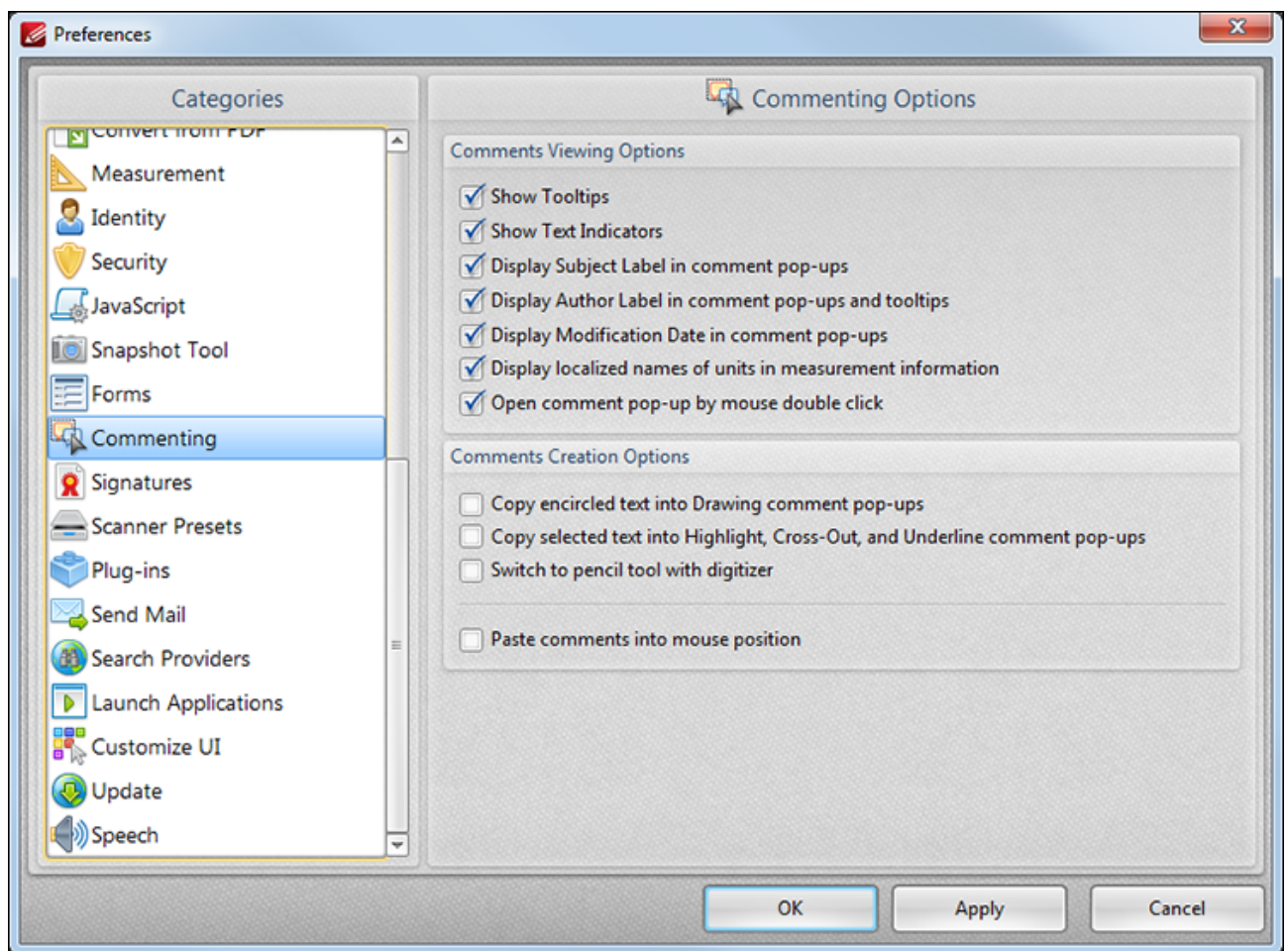
Figure 1. Preferences Dialog Box. Commenting Tab Selected

These options determine the settings for comments:

- Select the boxes in the **Comments Viewing Options** section to determine the elements of displayed comments.

- Select the **Copy encircled text into Drawing comment pop-ups** box as desired. This is intended for use with drawing-type comments. Encircled text will be copied into the pop-up comment and can then be edited.
- Select the **Copy selected text into Highlight, Cross-Out, and Underline comment pop-ups** box as desired. This setting is used in conjunction with the **Select Text Tool.** Selected text will be copied into the pop-up comment and can then be edited.
- Select the **Switch to pencil tool with digitizer** box as desired.
- Select the **Paste Comment into mouse position** box to paste copied comments at the position of the pointer.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Signatures

 Signatures

When the **Signatures** tab is selected the following options are available:
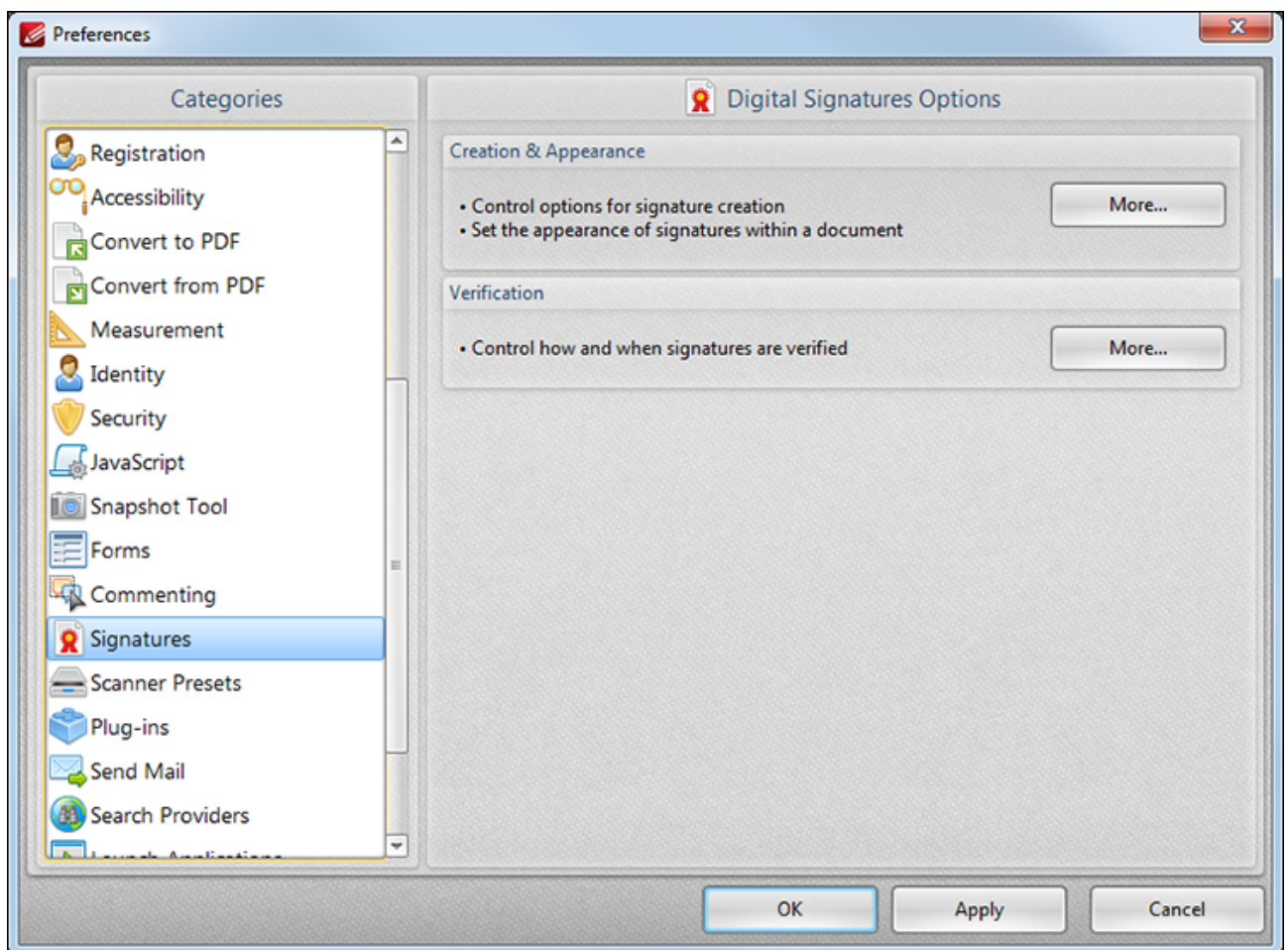
Figure 1. Preferences Dialog Box. Signatures Tab Selected

These options determine the settings for digital signatures.

- The **Creation & Appearance** settings determine the signature options. Click the **More** button to access the settings. These are detailed in *(figure 2)* below.

- The **Verification** settings determine how and when signatures are verified. Click the **More** button to access these settings. There are two options - select the check boxes as desired.
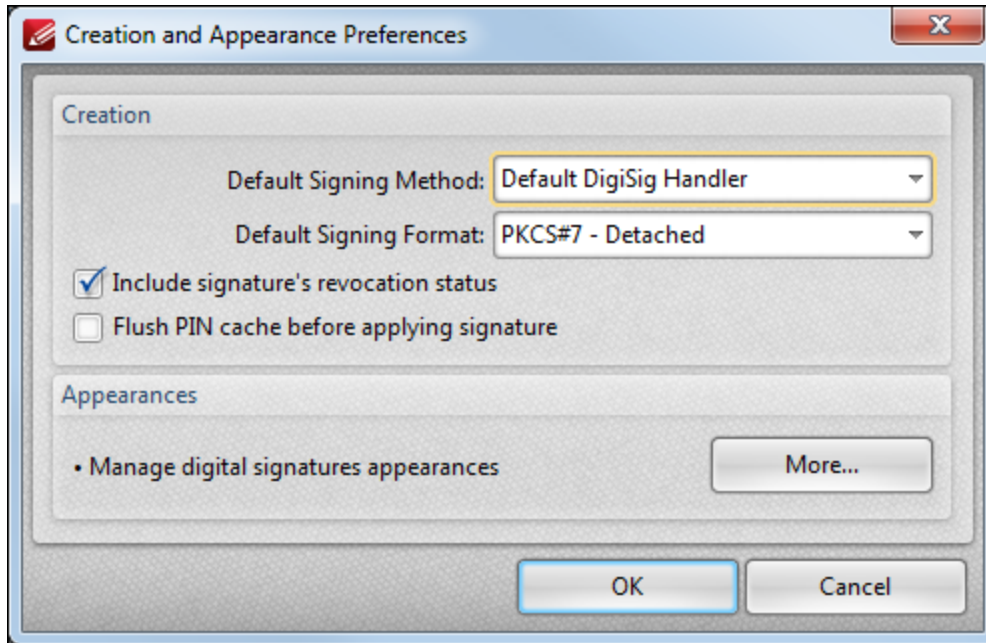
Figure 2. Creation and Appearance Preferences Dialog Box

The **Creation** settings are as follows:

- Select an option from the **Default Signing Method** menu to determine the default signing method settings.
- Select an option from the **Default Signing Format** menu to determine the signing format.
  - **PKCS#7 - Detatched** encodes certificates in **Abstract Syntax Notation One (ASN.1) format.**
  - **CAdES** is an electronic signature created in compliance with **eIDAS** and has the same legal value as a handwritten signature.
- Select the **Include signature's revocation status** box as desired. When selected, the revocation status of the signature will be shown in the main window.
- Select the **Flush PIN cache before applying signature** box as desired.
- Click the **More** button to set the **Digital Sign Appearance Templates.** The following dialog box will open:
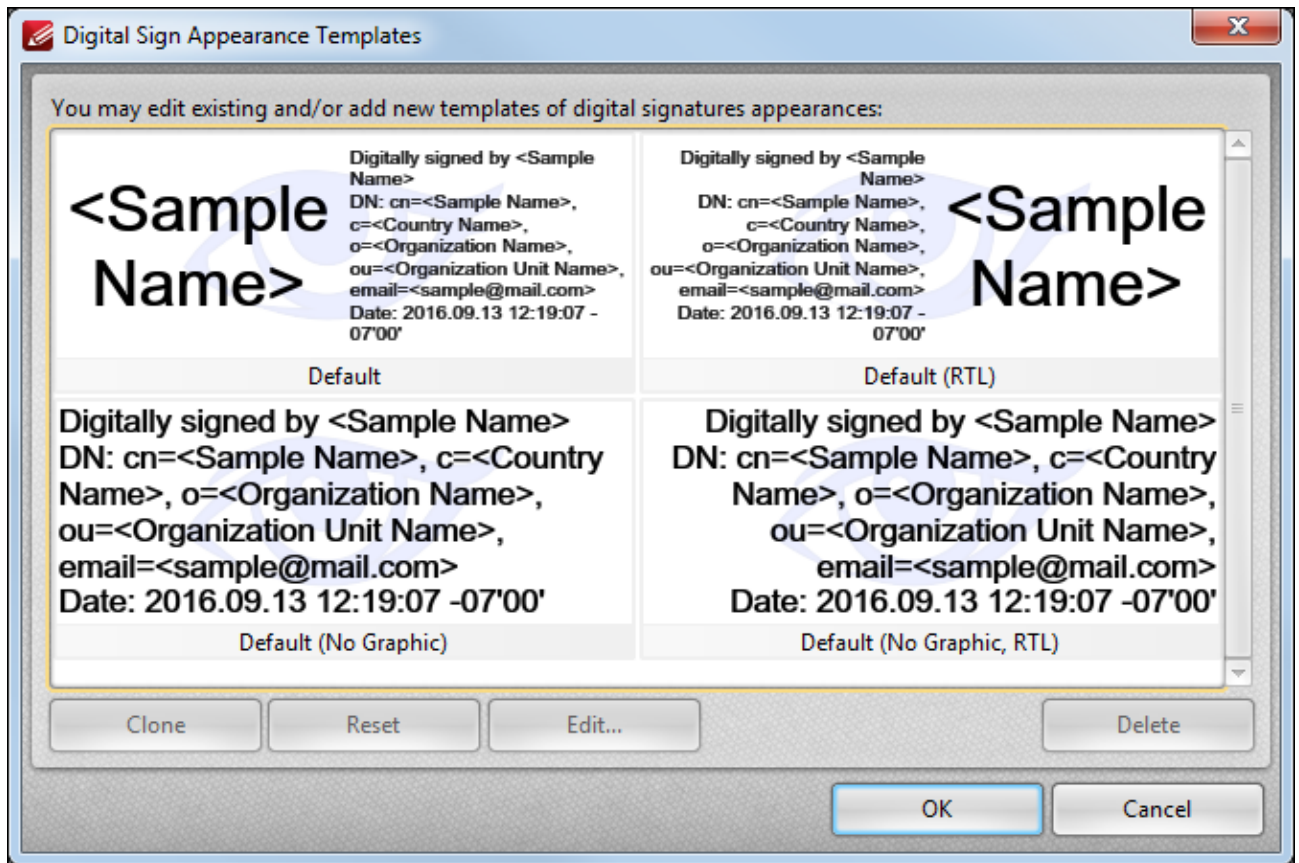
Figure 3. Digital Sign Appearance Templates Dialog Box

- When this dialog box is first launched the default values are given, as in **_(figure 3)_** above. Signatures can be created with or without graphics and in standard layout or **RTL** (right to left) layout. Select the tab of the signature format to be edited. The options to **Clone, Reset** and **Edit** will then be enabled.
- Click **Clone** to clone the selected signature. It will then appear in the dialog box. This is a useful feature if parameters of existing signatures need to be changed and saved without editing the original.
- Click **Reset** to revert the values of the the selected signature to their default settings.
- Click **Edit** to change the values of the selected signature. The following dialog box will open:
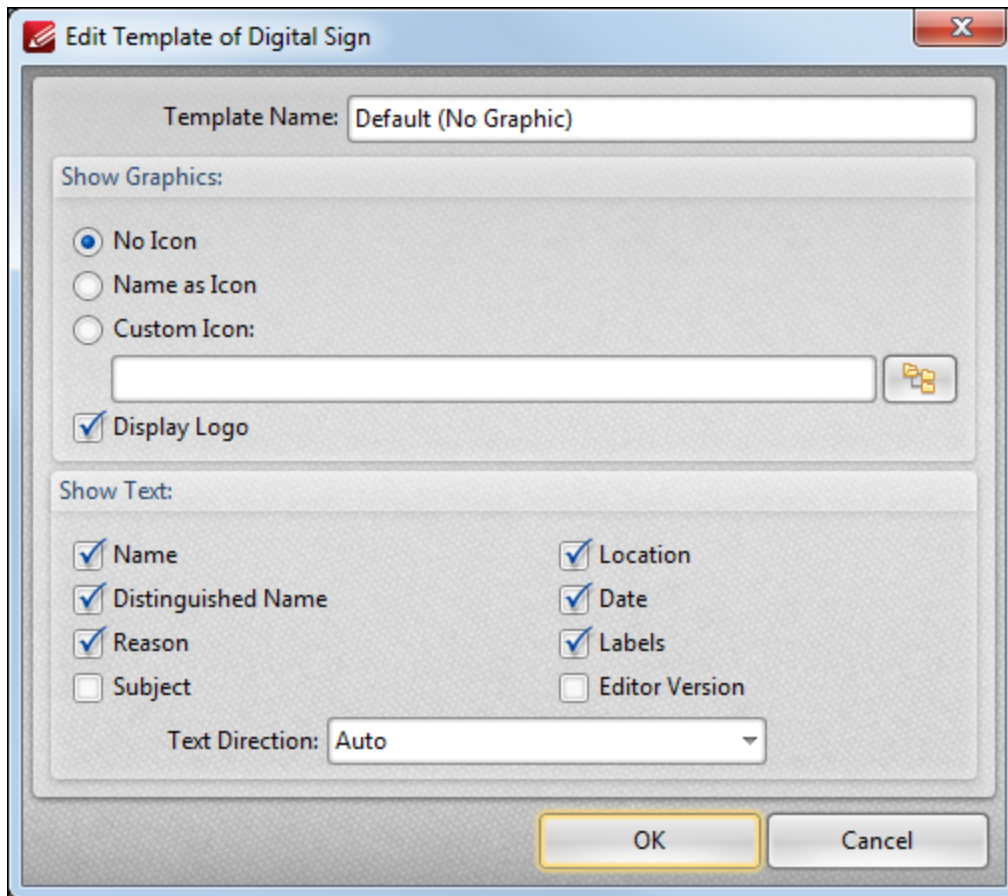
Figure 4. Edit Template of Digital Sign Dialog Box

- Enter a name for the template in the **Template Name** text box.
- Use the **Show Graphics** option buttons to determine the graphics that are shown with the template:
  - Select **Name as Icon** to use the name of the current user as the icon.
  - Select **Custom Icon** to use a custom icon. Enter the name of the file to be used in the text box or click the icon to select a file from the local computer.
- Select the **Display Logo** box to display logos in the background of templates.
- Select the boxes in the **Show Text** section to determine the information that is shown with templates.
- Use the **Text Selection** menu to determine the text direction.

When the desired parameters have been selected, click **OK** to apply them. Then, in the **Preferences** dialog box, click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Scanner Presets

Scanner Presets

When the **Scanner Presets** tab is selected the following options are available:
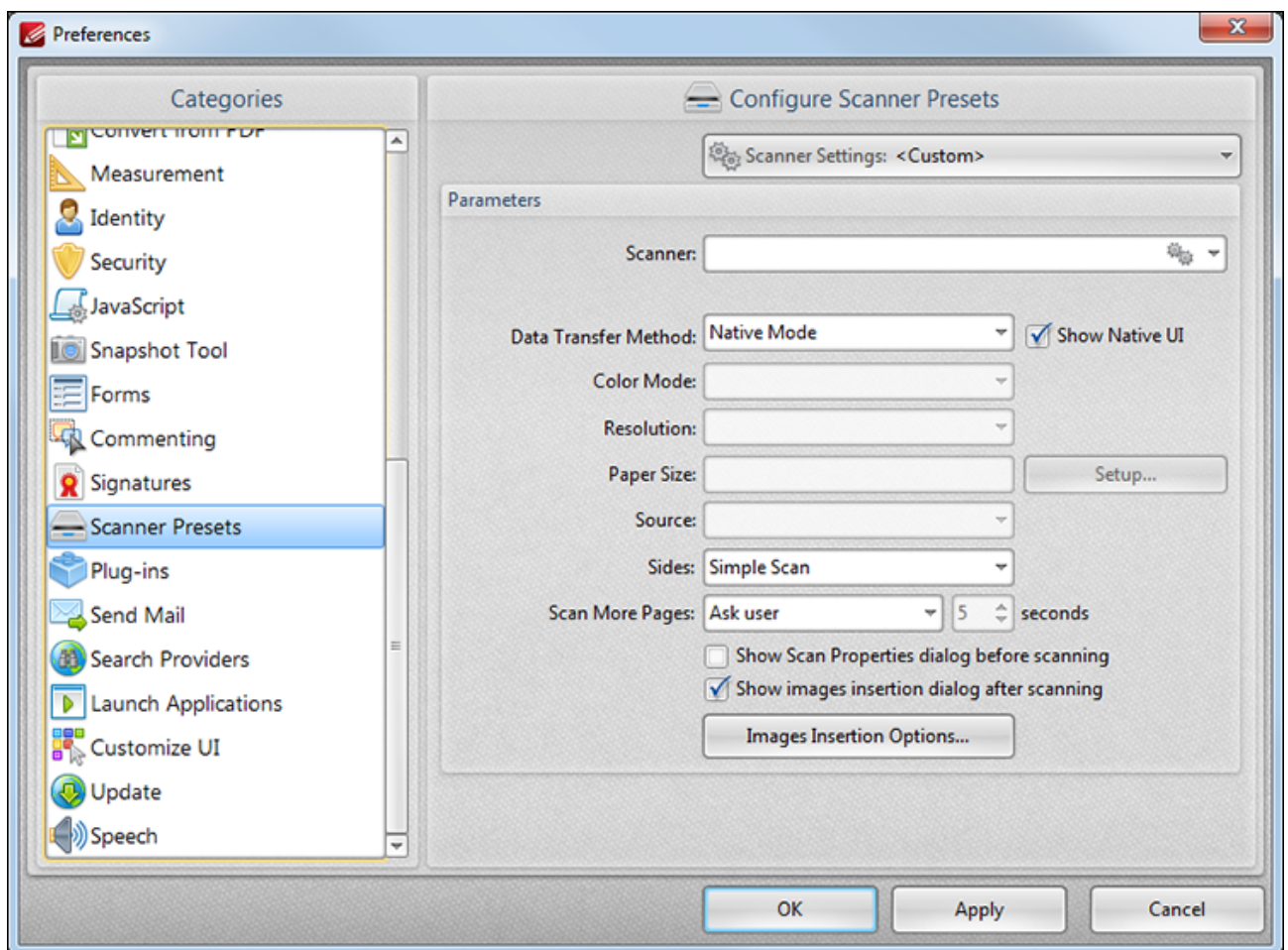
Figure 1. Preferences Dialog Box. Scanner Presets Tab Selected

These settings determine the presets for scanning:

- Click the **Scanner Settings** menu to select a preset scanning mode.
- Click the **Scanner** menu to select a scanner to use.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode.**

- **Color Mode** has four options. **Auto detect** detects the optimal color mode automatically. **Color, Grayscale** and **Black & White,** refer to the format of scanned documents.
- Click the **Resolution** menu to select the **dpi** (dots per inch) of scanned documents.
- **Paper Size** refers to the size of the paper used when scanning. Click **Setup** to access further options:
  - The **Automatic** option determines the paper size automatically.
  - The **Standard** option contains standard sizes such as those used by the **ISO** and **ANSI**.
  - The **Custom** option can be used to enter custom dimensions.
  - Select either **Portrait** or **Landscape** as the orientation of the document.
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner being used.
- Click the **Sides** menu to determine which sides of documents are scanned. There are four options: **Simple Scan, Full Duplex, Manual Duplex** and **Manual Duplex Reversed.** Click the arrow for an explanation of these options.
- Click the **Scan More Pages** menu to select the setting for when further pages are scanned.
- The **Show Native UI** box is selected by default. This means the scanner selects certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the box to customize these parameters manually.
- Select the **Show Scan Properties dialog before scanning** dialog box to view the scan properties before scanning.
- Select the **Show images insertion dialog after scanning** dialog box to view the images insertion dialog box after the scan has taken place.
- Click the **Images Insertion Options** button to open the **Images to PDF Options** dialog box. These settings determine how images are inserted into documents. They are explained here. 222

When custom settings have been entered they can be saved using the **Scanner Settings** menu. Click **Save Current Settings** to create a custom profile for subsequent use. Click **Manage** to manage previously saved profiles and **Delete** to remove the profile currently selected.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Plug-ins

Plug-ins

When the **Plug-ins** tab is selected the following options are available:
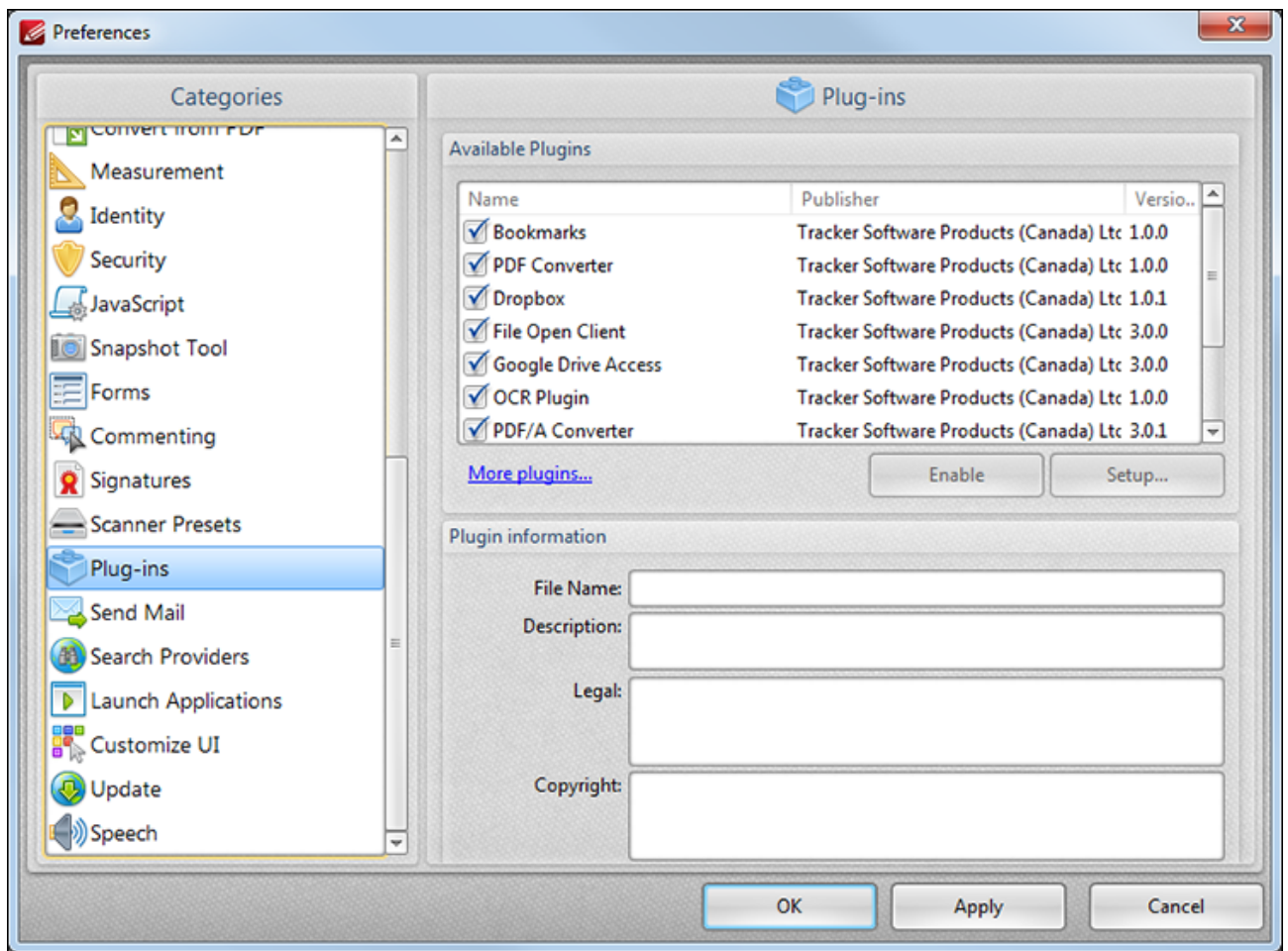
Figure 1. Preferences Dialog Box. Plug-ins Tab Selected

This dialog box shows plug-ins available to use in conjunction with **PDF-XChange Editor.**

- Select a plug-in from the list to view its details in the **Plugin information** section.
- When a plug-in is selected click the **Enable/Disable** button as desired.
- Click the **More plugins** link to view further plug-ins available from **Tracker Software Products.**

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Send Mail

Send Mail

When the **Send Mail** tab is selected the following options are available:
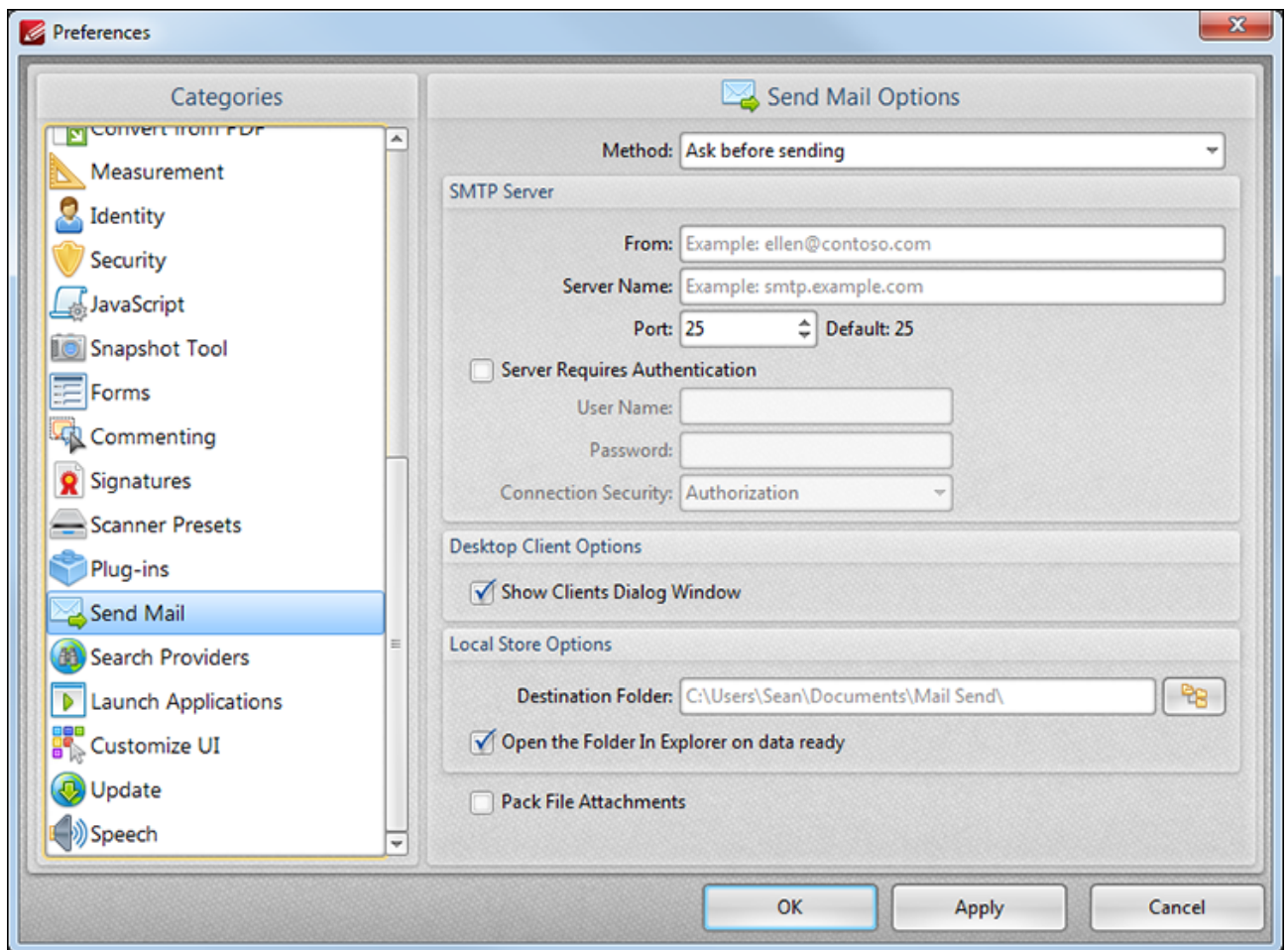
Figure 1. Preferences Dialog Box. Send Mail Tab Selected

These settings determine how files are sent using the email feature of **PDF-XChange Editor.** The options are as follows:

- Select an option from the **Method** menu to select the method through which emails are sent. There are four options:

- **Ask before sending** prompts the user for instructions before emails are sent.
- **Mail Client** sends email through the default email client currently set for Windows.
- **SMTP** bypasses the email client and uses the default values stored in the SMTP options of **PDF-XChange Editor.**
- **Local** launches the default email client application and uses it to create an email.

- The **SMTP Server** options are as follows:

  - Enter the email address from which the email will come in the **From** text box.
  - Enter the name of the server that will be used in the **Server** text box.
  - Use the **Port** text box to specify the port of the SMTP server.
  - Select the **Server Requires Authentication** box as desired.
  - Enter the name of the email user in the **User Name** text box.
  - Enter the password in the **Password** text box.
  - Use the **Connection Security** menu to specify the connection security level.

- Select the **Show Clients Dialog Window** box to view the dialog box of emails when they are sent.

- The **Local Store Options** define the parameters for local storage:
  - Enter the destination where files will be saved in the **Destination Folder** text box, or click the icon to select a folder manually.
  - Select the **Open the Folder In Explorer on data ready** box to open the destination folder using File Explorer.
  - Select the **Pack File Attachments** box as desired.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Search Providers

Search Providers

When the **Search Providers** tab is selected the following options are available:
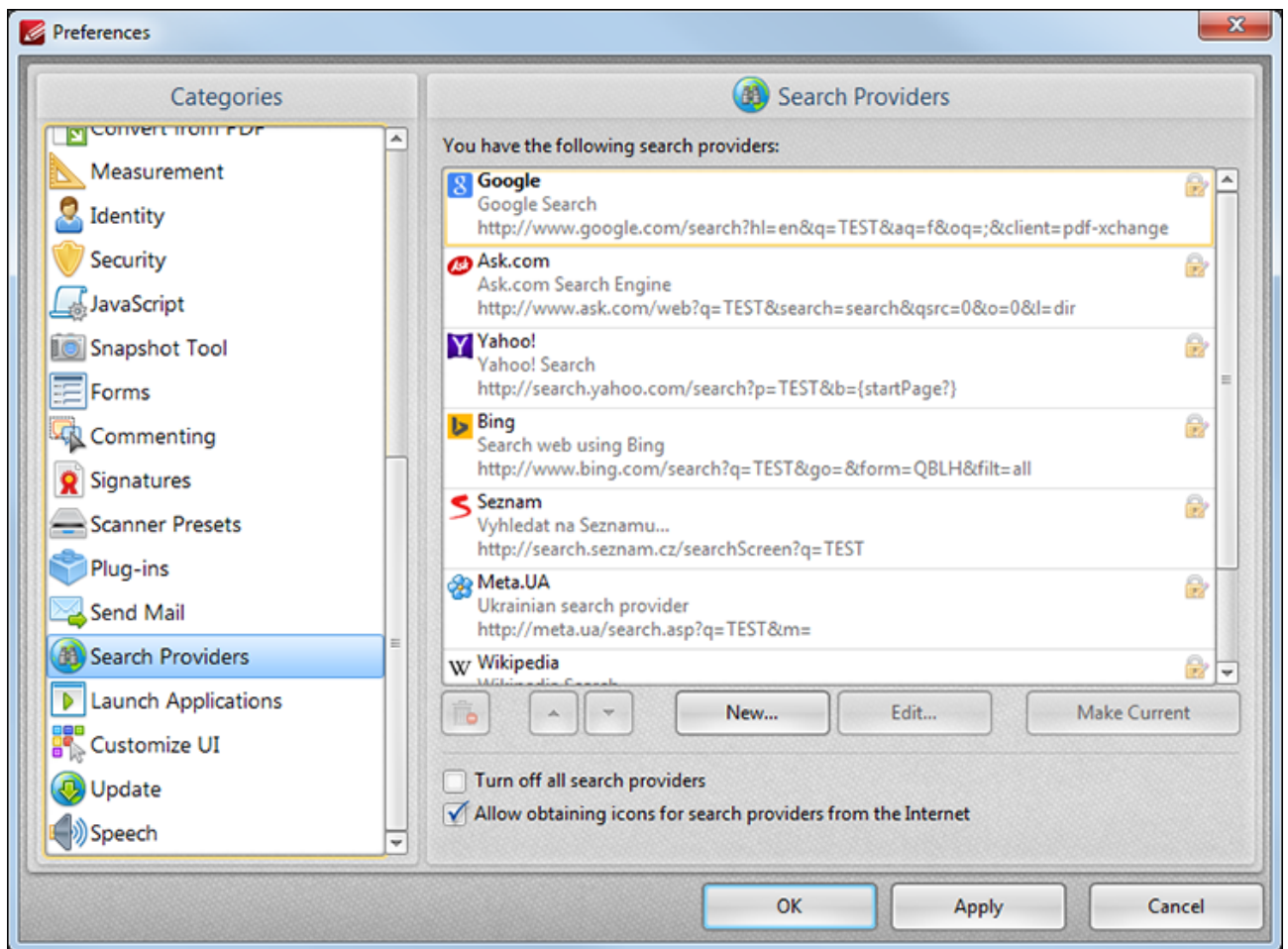
Figure 1. Preferences Dialog Box. Search Providers Tab Selected

This setting shows a list of the search providers currently used on the local computer.

- Click the **New** button to add a new search provider.
- Click the **Edit** button to edit the search provider currently selected.

- Click the **Make Current** button to set the search provider currently selected as the default search provider.
- Use the arrows to move the search provider currently selected up or down in the display window.
- Use the trashcan icon to remove the search provider currently selected.
- Select the **Turn off all search providers** box to disable all search providers.
- Select the **Allow obtaining icons for search providers from the Internet** option to permit the software to obtain search provider icons.

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Launch Applications

Launch Applications

When the **Launch Applications** tab is selected the following options are available:
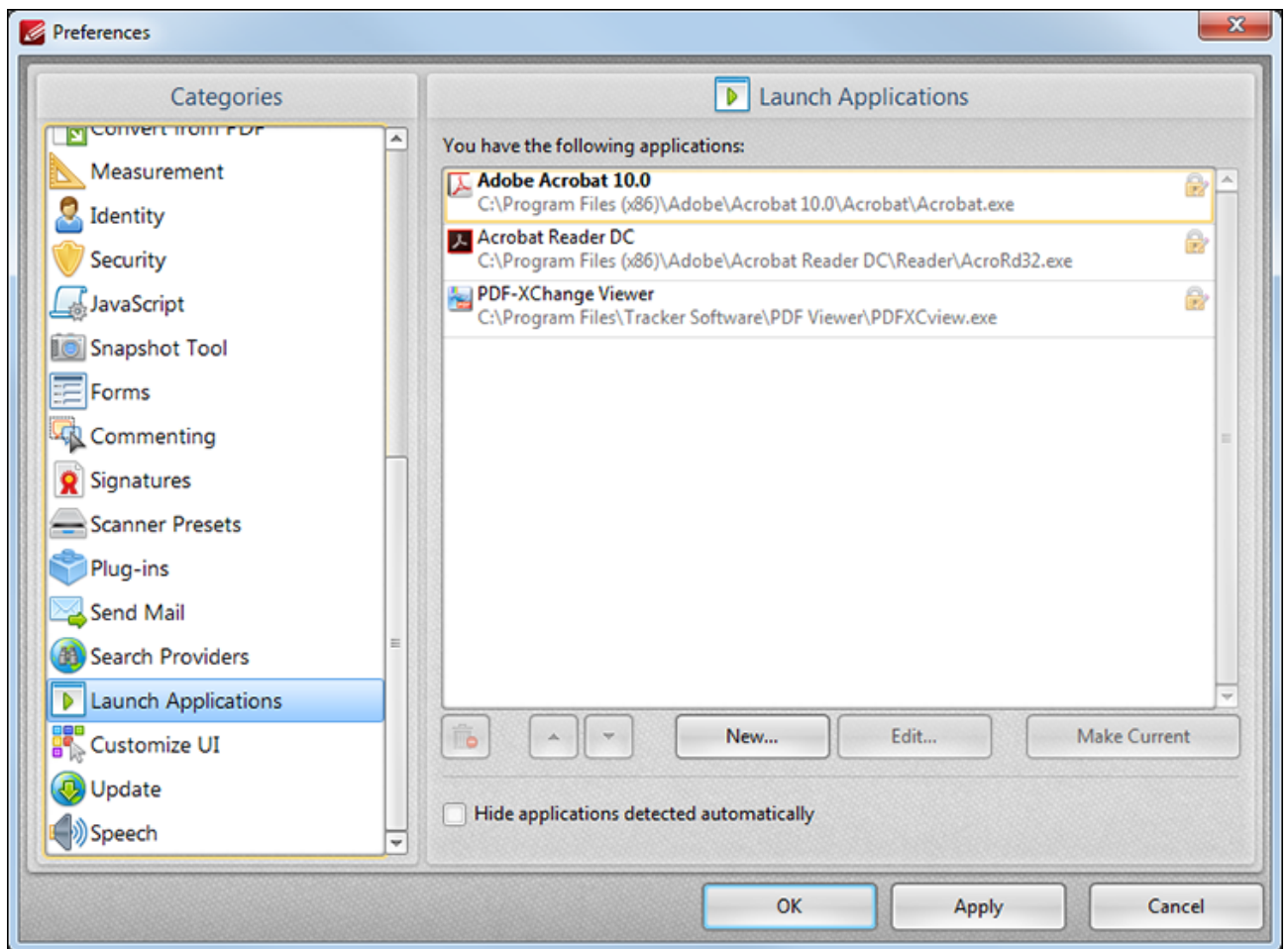
Figure 1. Preferences Dialog Box. Launch Applications Tab Selected

This setting displays the list of third-party applications currently featured in the **Launch Applications Toolbar.** 390 This toolbar provides a convenient way to open active documents using third party applications. Follow the instructions below to add new applications/edit existing applications:

- Click **New** to add a new application. The dialog box in **(figure 2)** will open.

- Click **Edit** to edit an existing application.
- Click **Make Current** to set the application currently selected as the default application.
- Use the arrows to move the search launch application currently selected up or down in the window.
- Use the trashcan icon to remove the application currently selected.
- Select the **Hide applications detected automatically** box as desired.
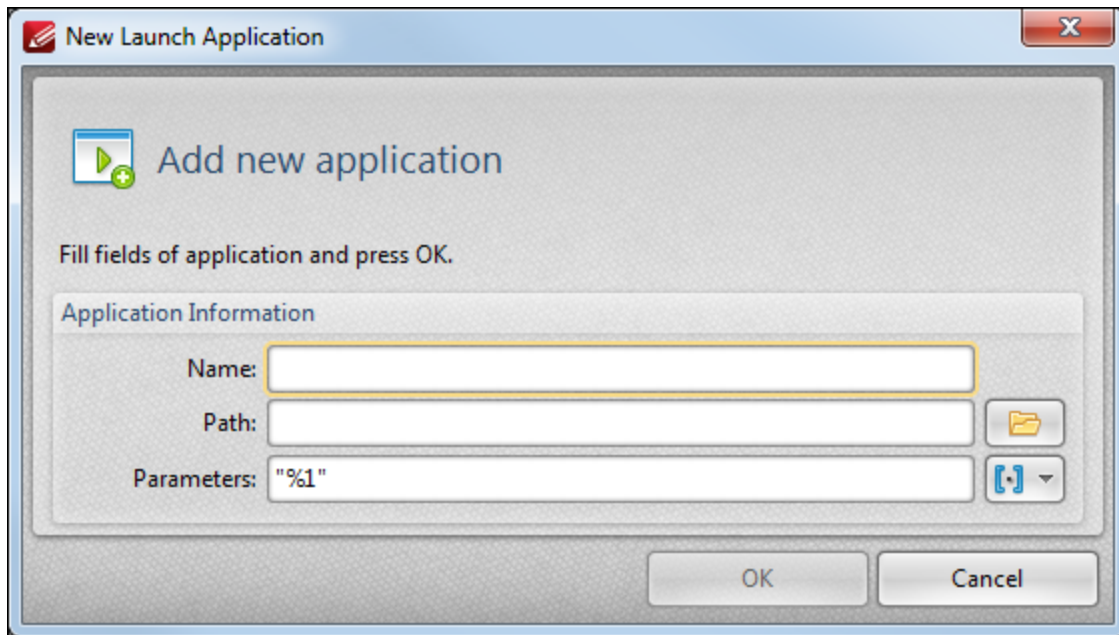
Figure 2. New Launch Application Dialog Box

- Enter a name for the launch application in the **Name** text box.
- Enter the path executable in the **Path** text box, or use the folder icon to select the application manually. Add the desired parameters to the application. These parameters are variables that result in the retention of specific document values when they are moved to the command that launches third-party applications. The available parameters are known as macros. 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to a corresponding output sequence. Enter macros in the **Parameters** text box as desired. Alternatively, use the icon to select them manually. The following parameters are available for all applications:
  - **File name,** which uses the variable %1 and inherits the file name and path. This is the only parameter that is required in all cases and it must be contained in double quotation marks.
  - **Zoom,** which uses the variable %z and inherits the zoom level.
  - **Page Number,** which uses the variable %p and inherits the current page number.
  - **Page (0-base numeration),** which uses the variable %p0 and inherits the first numerical page number that starts at 01, 02 etc.
  - **Position X (in pixels),** which uses the variable %vx and inherits the position viewed position viewed along the x axis.

- **Position Y (in pixels),** which uses the variable %vy and inherits the position viewed position viewed along the y axis.
- **Position X (in pt),** which uses the variable %px and inherits the position viewed position viewed along the x axis in pt.
- **Position Y (in pt),** which uses the variable %py and inherits the position viewed position viewed along the y axis in pt.
- **View Rotation,** which uses the variable %vr and inherits the rotation status of documents.
- Further macros than those detailed above are available, but it is necessary to use the launch commands of the application in question. For example, if **PDF-XChange Viewer** is being used, the launch command to open a file to a specific page is **/A "page=<page_number>".** Therefore the parameter **/A "page=%p" "%1"** would be used, where the desired page number is entered as the **%p** variable and the file name is entered as the **%1** variable. If more than one parameter is being used then parameters must be separated with an **"&"** symbol. Please note that some applications may not support the use of parameters.
- Click **OK** to add new applications. Click **Cancel** to cancel the process and close the dialog box.

Then, in the **Preferences** dialog box, click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Customize UI

Customize UI

When the **Customize UI** tab is selected the following options are available:
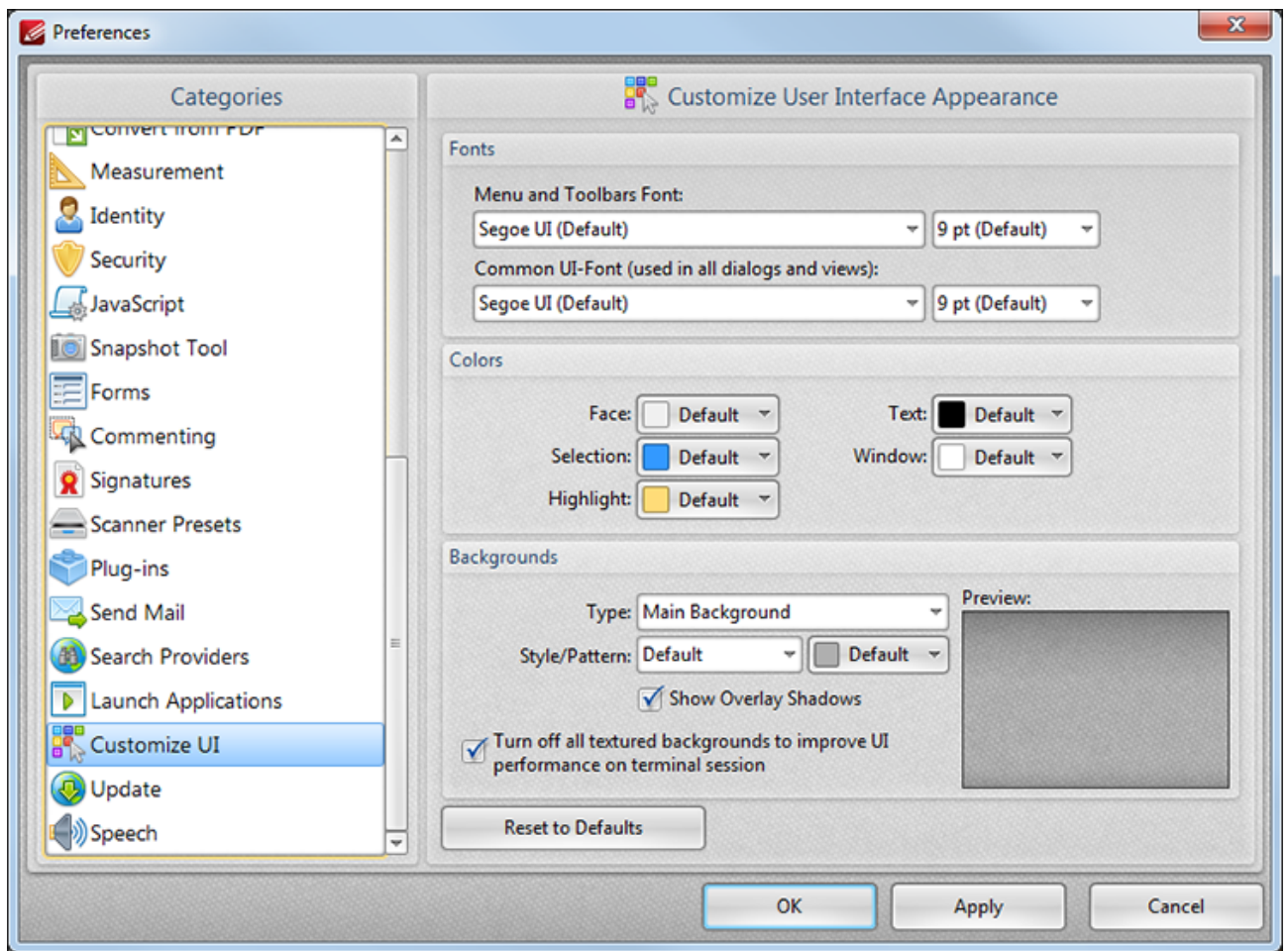
Figure 1. Preferences Dialog Box. Customize UI Tab Selected

These settings determine the appearance of the user interface:

- Use the menus in the **Fonts** section to determine the font style and size for menus, toolbars and general usage.
- Use the menus in the **Colors** section to determine the color of fonts at the locations indicated.

- Use the menus in the **Backgrounds** section to determine the UI display for backgrounds:
  - Use the **Type** menu to select the background to customize.
  - Use the **Style/Pattern** menus to select the style and color of the background.
  - Select the **Show Overlay Shadows** text box as desired.
  - Select the **Turn off all textured backgrounds to improve UI performance on terminal session** box as desired.

It is also possible to customize toolbars in **PDF-XChange Editor.** Those settings are explained <u>here.</u> 393

Click **Apply** to apply changes. Click **OK** to save changes and close the dialog box. Click **Cancel** to revert to previous changes and close the dialog box.

Update

Update

The **Update** tab can be used to check for software updates. Click the **Check for Updates Now** button to search automatically for updates.

Speech

Speech

When the **Speech** tab is selected the following options are available:
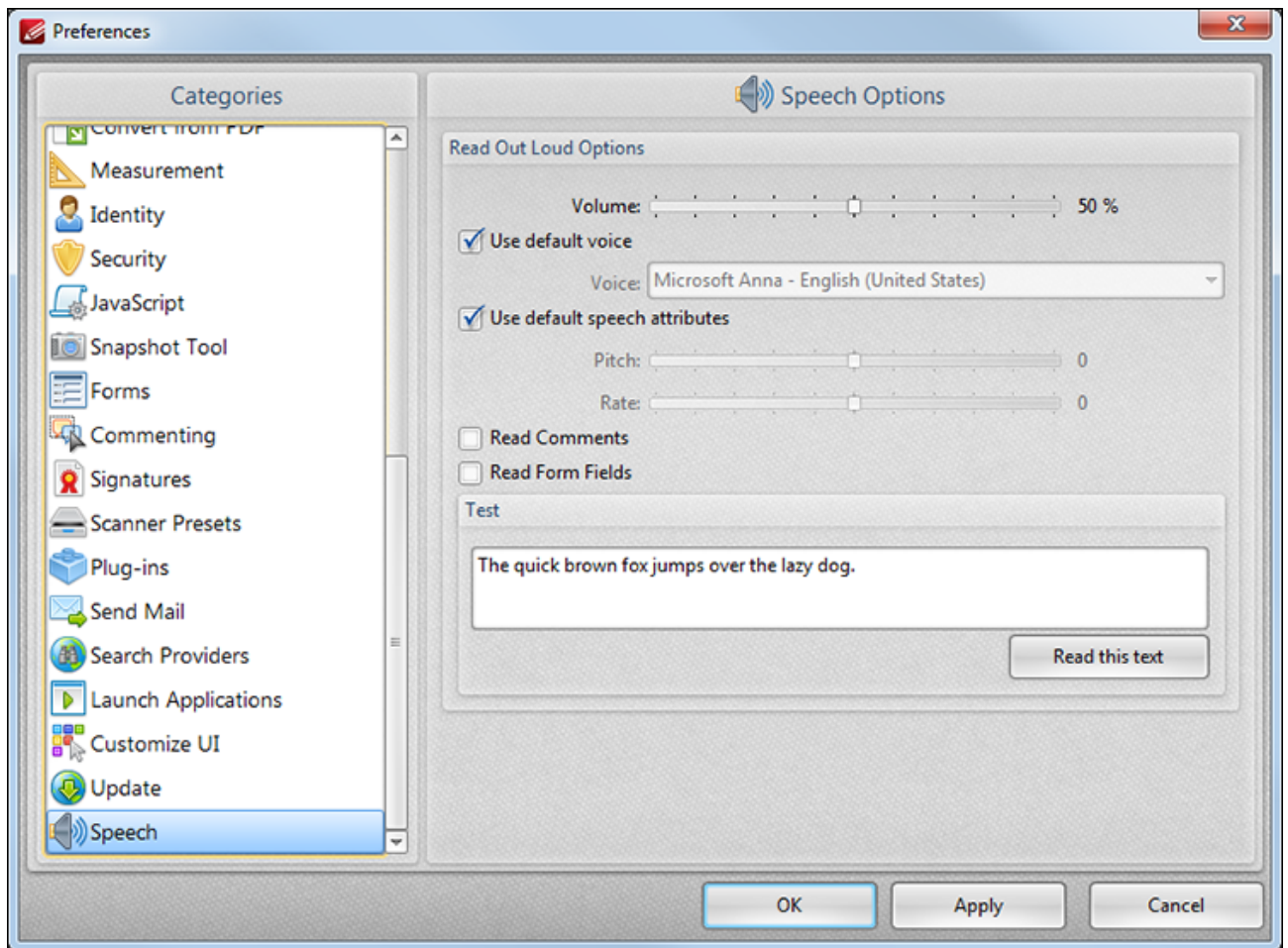
Figure 1. Preferences Dialog Box. Speech Tab Selected

These settings determine the options for the read out loud feature of **PDF-XChange Editor:**

- Select the **Use default voice** box as desired. If this box is not selected then it is possible to choose an alternative voice from the **Voice** menu.
- Select the **Use default speech attributes** box as desired. If this box is not selected then the **Pitch** and **Rate** options can be adjusted manually.
- Select the **Read comments** and **Read Form Fields** boxes as required.
- Use the **Test** text box to test customized settings. Enter sample text into the text box and click the **Read this text** button to test settings.

Instructions on how to use the read out loud feature are available here 610

When the desired settings have been selected, click **Apply** to enable them. Click **OK** to save settings and close the dialog box. Click **Cancel** to cancel the process and close the dialog box.

7.4 View

View

When the **View** tab is selected, the following options are available:
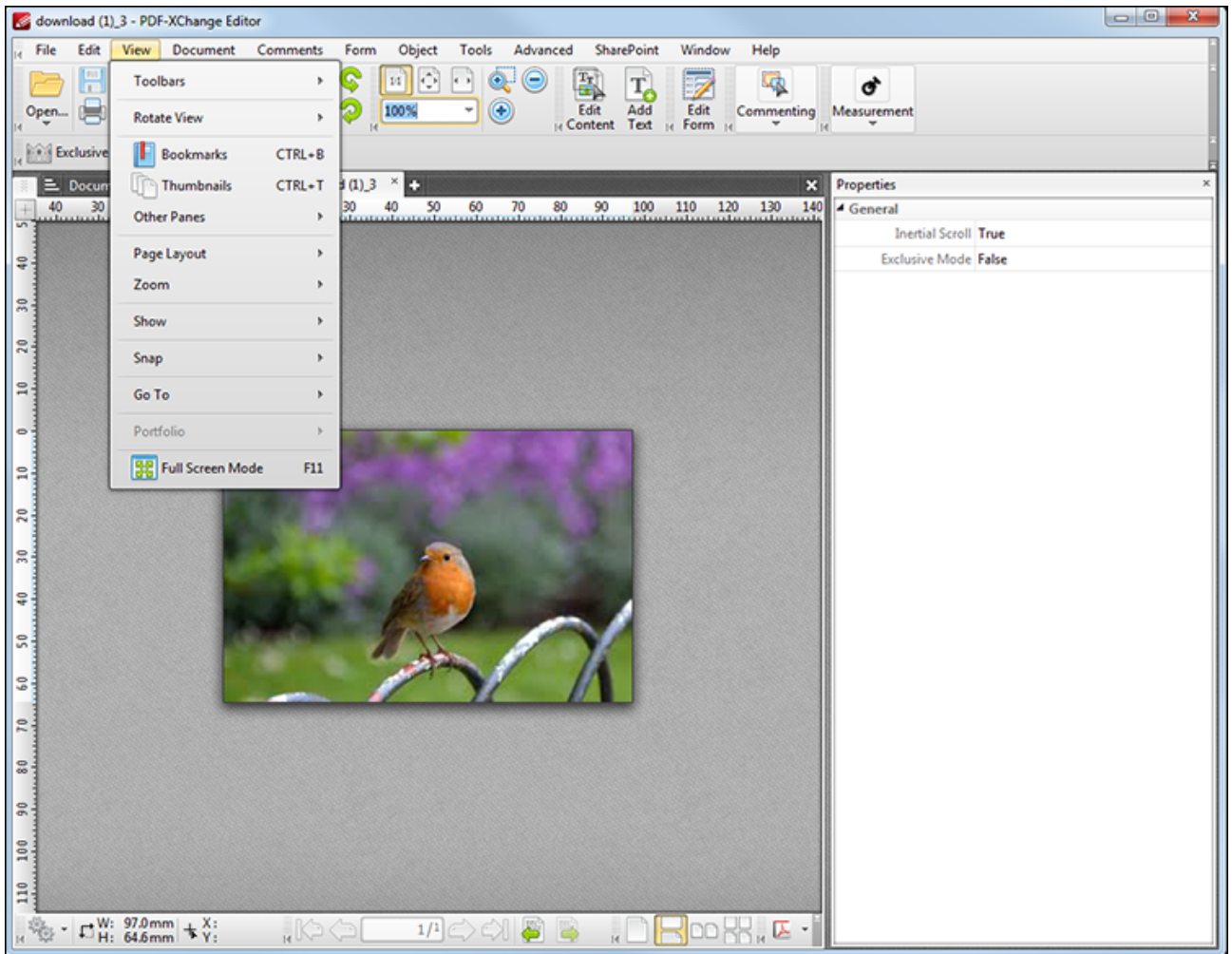
Figure 1. View Tab Menu

These options determine the viewing settings for specific elements of **PDF-XChange Editor.** Click the links below to access the associated sections of the manual:

Toolbars

Toolbars

When the **Toolbars** option is selected in the **View** tab, the following options are available:
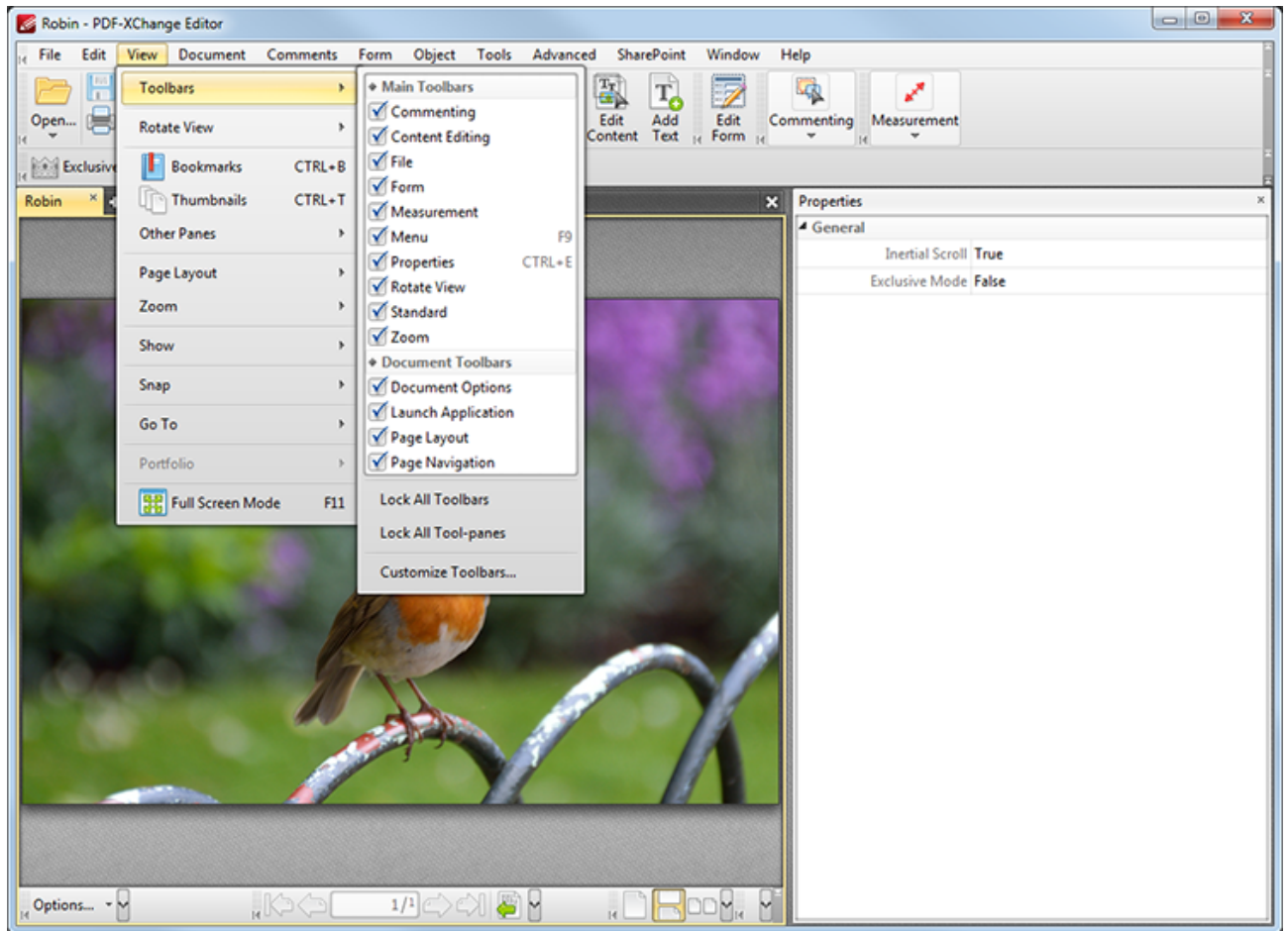
Figure 1. Toolbars Options

The toolbars in **PDF-XChange Editor** provide a convenient way to access the features and functions of the application. The **Shortcut Toolbar** is located at the top of the main window and appears as below:
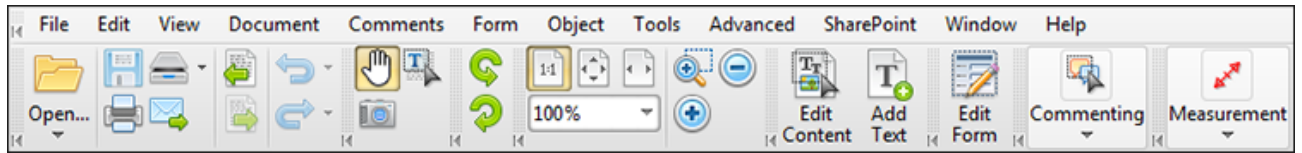
Figure 2. Shortcut Toolbar

This toolbar is composed of several toolbars:

The **Commenting Toolbar** contains options for adding/editing comments in the active document. It appears as below:
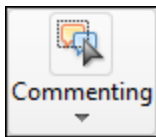
Figure 3. Commenting Toolbar

Click here 379 for an explanation of this icon and its functions.

The **Content Editing Toolbar** contains options for editing the content of the active document. It appears as below:
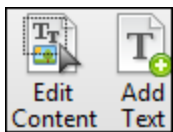
Figure 4. Content Editing Toolbar

Click here 341 for en explanation of these icons and their functions.

The **File Toolbar** contains options for navigating, creating, opening and saving documents. It appears as below:

Figure 5. File Toolbar

Click here 335 for an explanation of these icons and their functions.

The **Form Toolbar** contains options for adding/editing forms in the active document. It appears as below:
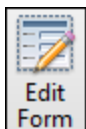
Figure 6. Form Toolbar

Click here 342 for an explanation of this icon and its functions.

The **Measurement Toolbar** contains options for measuring specific elements of the active document. It appears as below:
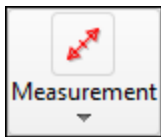
Figure 7. Measurement Toolbar

Click here 381 for an explanation of this icon and its functions.

The **Menu Toolbar** contains the main menu headings and provides links to their respective menu options. It appears as below:
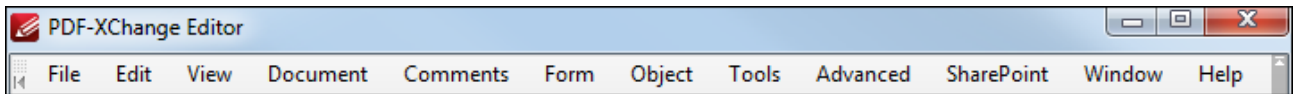
Figure 8. Menu Bar

Click here 334 for an explanation of these options.

The **Properties Toolbar** is located beneath the **Shortcut Toolbar.** The appearance and options of the **Properties Toolbar** depend on the type of object selected. A sample Properties Toolbar is displayed below:
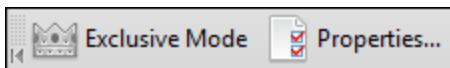
Figure 9. Properties Toolbar

Click here 391 for further details.

The **Rotate View Toolbar** contains options for rotating the active document. It appears as below:

Figure 10. Rotate View Toolbar

Click here 339 for an explanation of these icons and their functions.

The **Standard Toolbar** contains options for editing documents. It appears as below:

Figure 11. Standard Toolbar

Click here 336 for an explanation of these icons and their functions.

The **Zoom Toolbar** contains zoom options. It appears as below:

Figure 12. Zoom Toolbar

Click here 340 for an explanation of these icons and their functions.

The **Document Options** toolbar is located in the lower left corner of the main window and appears as below:
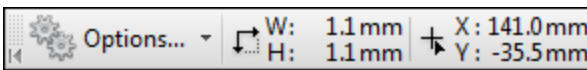
Figure 13. Document Options Toolbar

Click here 385 for an explanation of these settings.

The **Launch Application Toolbar** is located on the right of the **Page Layout Toolbar** and appears as below:

Figure 14. Launch Application Toolbar

Click here 390 for an explanation of these settings.

The **Page Layout Toolbar** is located in the lower right corner of the main window and appears as follows:

Figure 15. Page Layout Toolbar

Click here 389 for an explanation of these settings.

The **Page Navigation Toolbar** is located in the center of the lower section of the main window and appears as below:
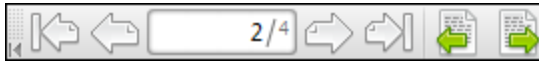
Figure 16. Document Navigation Toolbar

Click here ³⁸⁸ for an explanation of these settings.

There are three further options in the **Toolbars** submenu:

- Click **Lock all Toolbars** to lock/unlock all toolbars and menus for customization.

- Click **Lock All Tool-panes** to lock/unlock all tool-panes for toggling and resizing.

- Click **Customize Toolbars** to enable customizable options that relate to toolbars. These options are explained here ³⁹³.

Menu Bar

Menu Bar

The **Menu Bar** is the toolbar at the top of the main window:
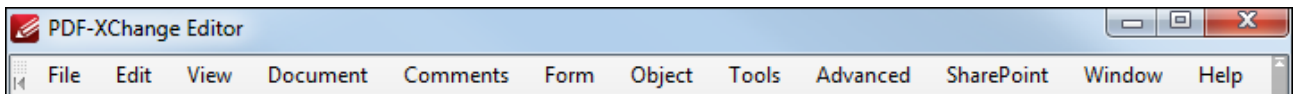
Figure 1. Menu Bar

- **File** contains file-level operations, such as selecting files to use, viewing properties, manipulating form data and printing.
- **Edit** contains editing functions for documents and their preferences.
- **View** determines the viewing elements of the application.
- **Document** contains controls for manipulating documents and document tools.
- **Comments** contains options for editing comments within documents.
- **Form** contains options for managing and editing form data.
- **Object** contains options for editing selected objects.
- **Tools** contains the tools that can be used in conjunction with the application.
- **Advanced** contains advanced functions such as the bookmarks plugin.
- **Sharepoint** allows the user to check in/out of a document located on the **Sharepoint** server.
- **Window** contains options for organizing the layout of open documents.
- **Help** contains options help options for users in need of assistance, as well as options for updating license keys and bug reporting.

The toolbar can be relocated as follows: hover the pointer on the grid of dots directly above the arrow icon on the left of the toolbar. The pointer icon will change from its standard display to an icon with four arrows. Click and hold to relocate the toolbar. Alternatively, press **<F9>.**

There is a shortcut for accessing the menu bar options detailed above: when the **Alt** key is pressed, the menu bar options each feature an underlined letter. Press the underlined letter on the keyboard to open the menu of the option.

Toolbars can be customized. See here [393] for further details.

File Toolbar

File Toolbar

The **File Toolbar** contains options for navigating, creating, opening and saving documents:

Open launches the **Open Files** dialog box in order to open a file from the local computer.

Save is used to save any changes that have been made to the active document since the last save.

Print launches the **Print** dialog box, which is explained here. [239]

Scan launches the **Scan Properties** dialog box, which is explained here. [230]

Email launches the **Send Mail** dialog box, which is explained here. [233]

Previous View moves to the active document most recently viewed in the main window.

Next view moves to the next active document in the main window.

Undo reverses the most recent editing action.

Redo reverses the most recent undo.

Standard Toolbar

Standard Toolbar

The **Standard Toolbar** contains options for editing documents:

The **Hand Tool** is used to "grab" and scroll through pages of the active document.

The **Snapshot Tool** is used to take snapshots of the active document. When it is enabled, click a page to take a screenshot. Alternatively, click and drag the pointer to select a custom rectangular area of the document. Release the button to take the snapshot. When a snapshot is taken, a bitmap copy of the selection is pasted to the clipboard. See here[301] for settings regarding the Snapshot Tool.

The **Select Text Tool** is used to select text for editing within the active document. Highlight text in the standard manner to select it. Then use the options in the **Edit** tab or right-click the selection for editing options. The following menu will be displayed:
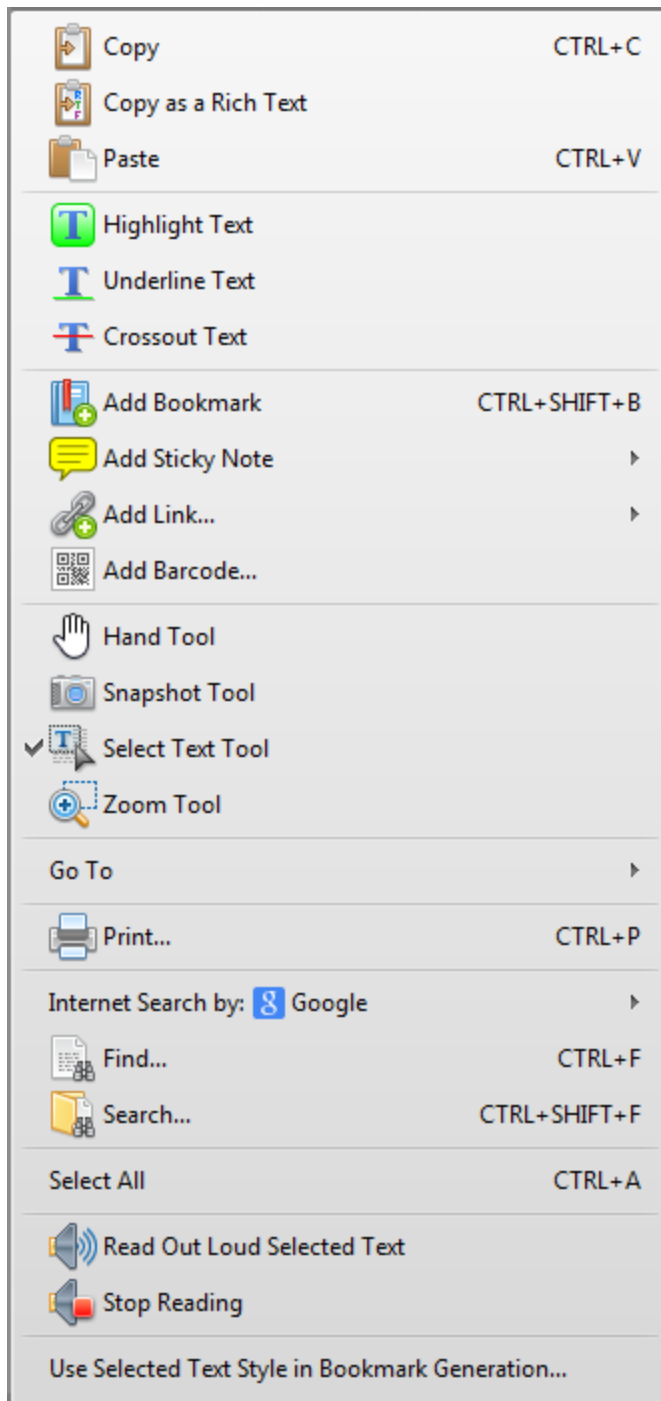
Figure 1. Select Text Tool, Right-Click Options

- Click **Copy** to copy the selection.
- Click **Copy as a Rich Text** to copy the selection in Rich Text Format.
- Click **Paste** to paste the current clipboard content into the document.
- Click **Highlight Text** to add a highlight to the document.
- Click **Underline Text** to add an underline to the document.
- Click **Crossout Text** to add a strikethrough to the document.

- Click **Add Bookmark** to add a bookmark to the document. See <u>here</u> 397 for further information.
- Click **Add Sticky Note** to add a sticky note annotation to the document.
- Click **Add Link** to add an external link to the document. The **Browse for Link Target** dialog box will open. See <u>here</u> 512 for further details.
- Click **Add Barcode** to add a barcode to the document. See <u>here</u> 427 for further details.
- Click **Hand Tool, Snapshot Tool, Select Text Tool** or **Zoom Tool** to select these tools.
- Click **Go To** to browse to specific locations of the current document, or to the previous/next document when multiple documents are open.
- Click **Print** to print the document. The **Print** dialog box will open. See <u>here</u> 239 for further details.
- Click **Internet Search by** to enter the selected text into an internet search engine and search the web for the selected text. Google is the search engine selected in *(figure 1).* Hover the pointer over the **Internet Search by** option to select a search engine to use.
- Click **Find** to locate specific text within the active document. See <u>here</u> 255 for further details.
- Click **Search** to search documents open in **PDF-XChange Editor** or folders on the local computer. See <u>here</u> 256 for further details.
- Click **Select All** to select all selectable elements within the active document.
- Click **Read Out Loud Selected Text** to activate the <u>Read Out Loud Feature</u> 610 for the text selected in the active document.
- Click **Stop Reading** to halt the Read Out Loud Feature during operation.
- Click **Use Selected Text Style in Bookmark Generation** to launch the **Bookmark Generation Properties** dialog box. This makes it possible to create a bookmark using the content and style of selected text. See <u>here</u> 533 for further details.

Rotate View Toolbar

Rotate View Toolbar

The **Rotate View Toolbar** contains options for rotating the active document. Please note that these changes are not permanent and they are intended for editing purposes. (The settings in the **Thumbnails** 400 pane can be used to rotate pages permanently). There are two options available for rotating the active document in the **Rotate View Toolbar:**

Rotate Counterclockwise rotates the active document counterclockwise. Documents will be rotated ninety degrees each time the icon is clicked.

Rotate Clockwise rotates the active document clockwise. Documents will be rotated ninety degrees each time the icon is clicked.

Zoom Toolbar

Zoom Toolbar

The **Zoom Toolbar** contains zooming options for the active document:

 The **Actual Size** button sets the active document to its actual size within the viewing pane. (This may result in the page exceeding the limits of viewable space. If this happens then the scroll bars can be used to view the entire document).

 The **Fit Page** button sets the borders of the active document to match those of the view pane.

 The **Fit Width** button fits the active document to match the width only of the view pane.

 The **Zoom Dropbox** can be used to select standard zoom settings. These are available on the menu indicated. Alternatively, enter a custom figure in the number box.

The **Zoom Tool** increases the zoom percentage of the active document. When it is selected the pointer is replaced with a magnifying glass icon. Click to zoom to the location at which the icon is located in the active document.

 The **Zoom In** button increases the zoom percentage of the active document. It focuses automatically on the center point of the document.

The **Zoom Out** button increases the zoom percentage of the active document. It focuses automatically on the center point of the document.

Content Editing Toolbar

Content Editing Toolbar

The **Content Editing Toolbar** contains options for editing content in the active document:

 The **Edit Content** tool is used to edit exiting content. When it is selected, the active document is divided into editable sections based on the images and text it contains. These sections can then be resized and relocated.

 The **Add Text** tool is used to add text to existing content. When it is selected the pointer is replaced with a cross icon. Click and drag the icon to create the space into which the new text is to be entered. When the mouse button is released it becomes possible to enter text into the designated space. When this tool is being used, customizable options are available in the **Properties Toolbar.** See <u>here</u> ₃₉₁ for an explanation of these options.

Further details about editing page content are available <u>here.</u> ₆₀₇

Form Toolbar

Form Toolbar

The **Form Toolbar** contains options for editing and adding forms to the active document:

When the **Edit Forms** button is selected, the following options are enabled in the **Properties Toolbar:**

The **Select Fields** option is used to select fields. Click an object to select it.

The **Text Field** option is used to add new text fields to the active document. See here 343 for further information.

The **Check Box** option is used to add new check boxes to the active document. See here 350 for further information.

The **Radio Button** option is used to add new radio buttons to the active document. See here 354 for further information.

The **List Box** option is used to add a new list of choices to the active document. See here 358 for further information.

The **Dropdown** option is used to add menus to the active document. See here 362 for further information.

The **Button** option is used to add action buttons to the active document. See here 368 for further information.

The **Digital Signature** option is used to add digital signatures to the active document. See here 371 for further information.

The **Barcode** option is used to add barcode fields to the active document in order to encode the data of the form. See here 375 for further information.

The **Keep Mode** option is used to retain the selected tool mode.

Text Field Variables

Text Field Variables

Text fields feature many adjustable variables. They can be accessed via the **Properties Pane**[405] when fields are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the text field will not be editable.
Locked	**Yes | No** If set to **Yes** then the text field cannot be moved and its properties cannot be modified.
Field name	Sets the text field name.
Tooltip	Information entered here will appear when the pointer is hovered over the text field.
Mapping name	Information entered here will be used as the mapping name for the text field.
Orientation	Sets the orientation of the text field.
Visibility	Sets the visibility of the text field. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**

Required	**Yes	No** If set to **Yes** then the text field is designated as a required[487] field.
Exportable	**Yes	No** If set to **Yes** then the text field data can be exported from the form.

Style	
Fill Color	Sets the fill color for the text field.
Stroke Color	Sets the color for the border of the text field.
Border Style	Sets the border style for the text field.
Border Width	Sets the border width.

Position	
Left	Sets the position of the text field in relation to the center of the document.
Top	Sets the position of the text field in relation to the top of the document.
Width	Sets the width of the text field.
Height	Sets the height of the text field.

Default Text Format	
Font	Sets the font of text field text.

Font Size	Sets the size of text field text.
Text Color	Sets the color of text field text.

Options	
Alignment	Sets the text alignment within the text field.
Default Value	Sets the default value of the text field. If the form is reset⌐485⌐ then it will revert to the value specified.
File Select	**Yes | No** If set to **Yes** then the text field text represents the path name of a file. The file contents are submitted as the value of the text field.
Password	**Yes | No** If set to **Yes** then the text field becomes a password field and cannot be copied.
Check Spelling	**Yes | No** If set to **Yes** then words entered in the text field will be spell-checked.
Multi Line	**Yes | No** If set to **Yes** then multiple lines of text will be permitted.
Scroll	**Yes | No** If set to **Yes** then a scroll bar will be inserted when there is not enough space for the content.
Allow Rich Text	**Yes | No** If set to **Yes** then the text field will allow Rich text.
Comb	**Yes | No**

	If set to **Yes** then line separators are inserted between characters in the text field. The **Character Limit** variable determines the number of comb lines.
Character Limit	Sets a character limit for the text field.

	Actions
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the text field.
Mouse Leave	Initiates an action when the pointer moves beyond the text field.
On Focus	Initiates an action when keyboard focus is on the text field.
On Blur	Initiates an action when keyboard focus leaves the text field.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> 512 in all options.

	Format Value
Category	Sets the category for which the options outlined below are determined.
None	No format is specified.
Number	Sets the text field input to numbers. **Decimal places** specifies permitted decimal places. **Separator Style** specifies the separators used for numbers.

	Currency Symbol specifies a currency symbol. **Symbol Location** specifies the location of the currency symbol in relation to the number. **Add Space** inserts a space between the currency symbol and the number. **Negative Number Style** specifies how negative numbers are designated.
Percentage	Sets the text field input to percentages. **Decimal places** specifies permitted decimal places. **Separator Style** specifies the separators used for numbers.
Date	Sets the text field input to date formats. **Date Format** specifies the date format.
Time	Sets the text field input to time formats. **Time Format** specifies the time format.
Special	Sets the text field input to the special format specified. **Special Format** specifies the special format.
Custom Action	Adds custom JavaScript actions to the field. **Format Action** displays custom scripts added for formats. **Keystroke Action** displays custom scripts added to validate keystrokes. Click the ellipsis icon (three dots) on the right to [determine script](#)⁵¹⁷ in both options.

Value Validation	
Validation	Sets the validation type as outlined below.
None	No value validation.
Value in range	Sets a range for the value within the text field.

	From specifies the minimum value. **To** specifies the maximum value.
Custom Action	Adds custom JavaScript actions to the text field. Click the ellipsis icon (three dots) on the right to <u>determine scripts.</u> 517

Value Calculation	
Calculation	Sets the calculation type as outlined below.
None	No calculation.
Sum (+)	Calculates the sum of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Product (*)	Calculates the product of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Average	Calculates the average of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Minimum	Determines the minimum value of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Maximum	Determines the maximum value of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Simplified Notation	Determines a calculation to be carried out on fields. Use the **Simple Notation** box to determine the calculation. Use the field names and standard mathematical notation.
Custom Action	Adds a custom JavaScript action to perform the calculation. Click the ellipsis icon (three dots) on the right to <u>determine scripts.</u> 517

Check Box Variables

![PDF-XChange Editor icon]**Check Box Variables**

Check boxes feature many adjustable variables. They can be accessed via the **Properties Pane** 405 when check boxes are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the check box will not be editable.
Locked	**Yes | No** If set to **Yes** then the check box cannot be moved and its properties cannot be modified.
Field name	Sets the check box name.
Tooltip	Information entered here will appear when the pointer is hovered over the check box.
Mapping name	Information entered here will be used as the mapping name for the check box.
Orientation	Sets the orientation of the check box.
Visibility	Sets the visibility of the check box. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**

Required	**Yes | No** If set to **Yes** then the check box is designated as a <u>required field</u> 487.
Exportable	**Yes | No** If set to **Yes** then the check box data can be exported from the form.

Style	
Fill Color	Sets the fill color for the check box.
Stroke Color	Sets the color for the border of the check box.
Border Style	Sets the border style for the check box.
Border Width	Sets the border width.

Position	
Left	Sets the position of the check box in relation to the center of the document.
Top	Sets the position of the check box in relation to the top of the document.
Width	Sets the width of the check box.
Height	Sets the height of the check box.

Default Text Format	
Font	Sets the font of check box text.

Font Size	Sets the size of check box text.
Text Color	Sets the color of check box text.

Options	
Check Box Style	Sets the style of the check box.
Export Value	Sets a custom value when the check box is exported. Enter the desired value in the text box.
Checked By Default	**Yes | No** If set to **Yes** then the check box is selected by default.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the check box.
Mouse Leave	Initiates an action when the pointer moves beyond the check box.
On Focus	Initiates an action when keyboard focus is on the check box.
On Blur	Initiates an action when keyboard focus leaves the check box.
Please note	Click the ellipsis icon (three dots) on the right to determine actions [512] in all options.

Radio Button Variables

Radio Button Variables

Radio buttons feature many adjustable variables. They can be accessed via the **Properties Pane**⁴⁰⁵ when radio buttons are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the radio button will not be editable.
Locked	**Yes | No** If set to **Yes** then the radio button cannot be moved and its properties cannot be modified.
Field name	Sets the radio button name. Radio buttons in the same group must have the same name.
Tooltip	Information entered here will appear when the pointer is hovered over the radio button.
Mapping name	Information entered here will be used as the mapping name for the radio button.
Orientation	Sets the orientation of the radio button.
Visibility	Sets the visibility of the radio button. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**

Required	**Yes | No** If set to **Yes** then the radio button is designated as a <u>required field</u> 487.
Exportable	**Yes | No** If set to **Yes** then the radio button data can be exported from the form.

Style	
Fill Color	Sets the fill color for the radio button.
Stroke Color	Sets the color for the border of the radio button.
Border Style	Sets the border style for the radio button.
Border Width	Sets the border width.

Position	
Left	Sets the position of the radio button in relation to the center of the document.
Top	Sets the position of the radio button in relation to the top of the document.
Width	Sets the width of the the radio button.
Height	Sets the height of the the radio button.

Default Text Format	

Font Size	Sets the size of the radio button.
Text Color	Sets the color of the radio button.

Options	
Radio Button Style	Sets the style of the radio button.
Export Value	Sets a custom value when the radio button is exported. Enter the desired value in the text box.
Checked By Default	**Yes | No** If set to **Yes** then the radio button is selected by default.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the radio button.
Mouse Leave	Initiates an action when the pointer moves beyond the radio button.
On Focus	Initiates an action when keyboard focus is on the radio button.
On Blur	Initiates an action when keyboard focus leaves the radio button.

Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> [512] in all options.

List Box Variables

List Box Variables

List boxes feature many adjustable variables. They can be accessed via the **Properties Pane** [405] when list boxes are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the list box will not be editable.
Locked	**Yes | No** If set to **Yes** then the list box cannot be moved and its properties cannot be modified.
Field name	Sets the list box name.
Tooltip	Information entered here will appear when the pointer is hovered over the list box.
Mapping name	Information entered here will be used as the mapping name for the list box.
Orientation	Sets the orientation of the list box.
Visibility	Sets the visibility of the list box. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**
Required	**Yes | No**

	If set to **Yes** then the list box is designated as a [required field](#)₄₈₇.
Exportable	**Yes | No** If set to **Yes** then the list box data can be exported from the form.

Style	
Fill Color	Sets the fill color for the list box.
Stroke Color	Sets the color for the border of the list box.
Border Style	Sets the border style for the list box.
Border Width	Sets the border width.

Position	
Left	Sets the position of the list box in relation to the center of the document.
Top	Sets the position of the list box in relation to the top of the document.
Width	Sets the width of the the list box.
Height	Sets the height of the the list box.

Default Text Format	
Font	Sets the font of list box text.

Font Size	Sets the size of list box text.
Text Color	Sets the color of list box text.

Options	
List box items	Click this field to determine the contents of the list box. Please note that export values are always the same as display values.
Sort Items	**Yes | No** If set to yes then listed items will be sorted automatically.
Multiple Selections	**Yes | No** If set to yes then it is possible to select more than one list item.
Immediately Commit	**Yes | No** If set to **Yes** then fields that depend on the selection will change immediately when it is selected. If set to **No** then dependent fields will populate only when the focus moves outside the list box.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the list box.
Mouse Leave	Initiates an action when the pointer moves beyond the list box.
On Focus	Initiates an action when keyboard focus is on the list box.

On Blur	Initiates an action when keyboard focus leaves the list box.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> 512 in all options.

Selection Change	
Action	Click the ellipsis icon (three dots) on the right to <u>determine an action</u> 512 that initiates when the selection is changed.

Dropdown Variables

Dropdown Variables

Dropdowns feature many adjustable variables. They can be accessed via the **Properties Pane** 405 when dropdowns are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the dropdown will not be editable.
Locked	**Yes | No** If set to **Yes** then the dropdown cannot be moved and its properties cannot be modified.
Field name	Sets the dropdown name.
Tooltip	Information entered here will appear when the pointer is hovered over the dropdown.
Mapping name	Information entered here will be used as the mapping name for the dropdown.
Orientation	Sets the orientation of the dropdown.
Visibility	Sets the visibility of the dropdown. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**

Required	**Yes	No** If set to **Yes** then the dropdown is designated as a [required field](#) 487.
Exportable	**Yes	No** If set to **Yes** then the dropdown data can be exported from the form.

Style	
Fill Color	Sets the fill color for the dropdown.
Stroke Color	Sets the color for the border of the dropdown.
Border Style	Sets the border style for the dropdown.
Border Width	Sets the border width.

Position	
Left	Sets the position of the dropdown in relation to the center of the document.
Top	Sets the position of the dropdown in relation to the top of the document.
Width	Sets the width of the the dropdown.
Height	Sets the height of the the dropdown.

Default Text Format	
Font	Sets the font of dropdown text.

Font Size	Sets the size of dropdown text.
Text Color	Sets the color of dropdown text.

Options	
Combo Box Items	Click this field to determine the contents of the dropdown. Please note that export values are always the same as display values.
Sort Items	**Yes | No** If set to **Yes** then listed items will be sorted automatically.
Allow Edit	**Yes | No** If set to **Yes** then it is possible for users to edit the dropdown selections.
Check Spelling	**Yes | No** If set to **Yes** then words entered in the dropdown will be spell-checked.
Immediately Commit	**Yes | No** If set to **Yes** then fields that depend on the selection will change immediately when it is selected. If set to **No** then dependent fields will populate only when the focus moves outside the dropdown.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the dropdown.

Mouse Leave	Initiates an action when the pointer moves beyond the dropdown.
On Focus	Initiates an action when keyboard focus is on the dropdown.
On Blur	Initiates an action when keyboard focus leaves the dropdown.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> [512] in all options.

	Format Value
Category	Sets the category for which the options outlined below are determined.
None	No format is specified.
Number	Sets the dropdown input to numbers. **Decimal places** specifies permitted decimal places. **Separator Style** specifies the separators used for numbers. **Currency Symbol** specifies a currency symbol. **Symbol Location** specifies the location of the currency symbol in relation to the number. **Add Space** inserts a space between the currency symbol and the number. **Negative Number Style** specifies how negative numbers are displayed.
Percentage	Sets the dropdown input to percentages. **Decimal places** specifies permitted decimal places. **Separator Style** specifies the separators used for numbers.
Date	Sets the dropdown input to date formats. **Date Format** specifies the date format.
Time	Sets the dropdown input to time formats.

	Time Format specifies the time format.
Special	Sets the dropdown input to the special format specified. **Special Format** specifies the special format.
Custom Action	Adds custom JavaScript actions to the dropdown. **Format Action** displays custom scripts added for formats. **Keystroke Action** displays custom scripts added to validate keystrokes. Click the ellipsis icon (three dots) on the right to <u>determine script</u>|517| in both options.

Value Validation	
Value in range	Sets a range for the value within the dropdown. **From** specifies the minimum value. **To** specifies the maximum value.
Custom Action	Adds custom JavaScript actions to the dropdown. Click the ellipsis icon (three dots) on the right to <u>determine scripts.</u> |517|

Value Calculation	
Calculation	Sets the calculation type as outlined below.
None	No calculation.
Sum (+)	Calculates the sum of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Product (*)	Calculates the product of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.

Average	Calculates the average of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Minimum	Determines the minimum value of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Maximum	Determines the maximum value of the selected fields. Click the ellipsis icon (three dots) on the right to select fields.
Simplified Notation	Determines a calculation to be carried out on fields. Use the **Simple Notation** box to determine the calculation. Use the field names and standard mathematical notation.
Custom Action	Adds a custom JavaScript action to perform the calculation. Click the ellipsis icon (three dots) on the right to <u>determine scripts.</u> [517]

Button Variables

Button Variables

Buttons feature many adjustable variables. They can be accessed via the **Properties Pane** 405 when buttons are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the button will not be editable.
Locked	**Yes | No** If set to **Yes** then the button cannot be moved and its properties cannot be modified.
Field name	Sets the button name.
Tooltip	Information entered here will appear when the pointer is hovered over the button.
Mapping name	Information entered here will be used as the mapping name for the button.
Orientation	Sets the orientation of the button.
Visibility	Sets the visibility of the button. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**
Required	**Yes | No**

	If set to **Yes** then the button is designated as a <u>required field</u> 487.
Exportable	**Yes	No** If set to **Yes** then the button data can be exported from the form.

Style	
Fill Color	Sets the fill color for the button.
Stroke Color	Sets the color for the border of the button.
Border Style	Sets the border style for the button.
Border Width	Sets the border width.

Position	
Left	Sets the position of the button in relation to the center of the document.
Top	Sets the position of the button in relation to the top of the document.
Width	Sets the width of the the button.
Height	Sets the height of the the button.

Default Text Format	
Font Size	Sets the size of the button text.

Text Color	Sets the color of the button text.

Options	
Layout	Sets the layout style of the button.
Behavior	Sets the behavior of the button when it is clicked.
Checked By Default	**Yes | No** If set to **Yes** then buttons are selected by default.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the button.
Mouse Leave	Initiates an action when the pointer moves beyond the button.
On Focus	Initiates an action when keyboard focus is on the button.
On Blur	Initiates an action when keyboard focus leaves the button.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> [512] in all options.

Digital Signature Variables

Digital Signature Variables

Digital signatures feature many adjustable variables. They can be accessed via the **Properties Pane**[405] when digital signatures are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the digital signature will not be editable.
Locked	**Yes | No** If set to **Yes** then the digital signature cannot be moved and its properties cannot be modified.
Field name	Sets the digital signature name.
Tooltip	Information entered here will appear when the pointer is hovered over the digital signature.
Mapping name	Information entered here will be used as the mapping name for the digital signature.
Orientation	Sets the orientation of the digital signature.
Visibility	Sets the visibility of the digital signature. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**

Required	**Yes | No** If set to **Yes** then the digital signature is designated as a <u>required field</u>⁴⁸⁷.
Exportable	**Yes | No** If set to **Yes** then the digital signature data can be exported from the form.

Style	
Fill Color	Sets the fill color for the digital signature.
Stroke Color	Sets the color for the border of the digital signature.
Border Style	Sets the border style for the digital signature.
Border Width	Sets the border width.

Position	
Left	Sets the position of the digital signature in relation to the center of the document.
Top	Sets the position of the digital signature in relation to the top of the document.
Width	Sets the width of the the digital signature.
Height	Sets the height of the the digital signature.

Default Text Format	
Font Size	Sets the size of the digital signature text.

Text Color	Sets the color of the digital signature text.

Actions

Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the digital signature.
Mouse Leave	Initiates an action when the pointer moves beyond the digital signature.
On Focus	Initiates an action when keyboard focus is on the digital signature.
On Blur	Initiates an action when keyboard focus leaves the digital signature.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> 512 in all options.

Signed

When Signed	Determines the behavior of the form when the signature field is signed: • **Do Nothing** retains the existing behavior of the form. • **Mark as Read-Only** sets the field(s) determined in the **Fields Range** option, which becomes visible when this option is selected, as read-only elements. This means that they cannot be edited. • **Custom Action** adds custom JavaScript actions to the digital signature: • **Format Action** displays custom scripts added for formats. • **Keystroke Action** displays custom scripts added to validate keystrokes. Click the ellipsis icon (three dots) on the right to <u>determine script</u> 517 in all options.

Barcode Variables

![PDF-XChange Editor logo]**Barcode Variables**

Barcodes feature many adjustable variables. They can be accessed via the **Properties Pane**[405] when barcodes are selected. The following options are available:

General	
Read Only	**Yes | No** If set to **Yes** then the barcode will not be editable.
Locked	**Yes | No** If set to **Yes** then the barcode cannot be moved and its properties cannot be modified.
Field name	Sets the barcode name.
Tooltip	Information entered here will appear when the pointer is hovered over the barcode.
Mapping name	Information entered here will be used as the mapping name for the barcode.
Orientation	Sets the orientation of the barcode.
Visibility	Sets the visibility of the barcode. The following options are available: • **Visible** • **Hidden** • **Visible but does not print** • **Hidden but printable**
Required	**Yes | No**

	If set to **Yes** then the barcode is designated as a <u>required field</u> 487.
Exportable	**Yes | No** If set to **Yes** then the barcode data can be exported from the form.

Style	
Fill Color	Sets the fill color for the barcode.
Stroke Color	Sets the color for the border of the barcode.
Border Style	Sets the border style for the barcode.
Border Width	Sets the border width.

Position	
Left	Sets the position of the barcode in relation to the center of the document.
Top	Sets the position of the barcode in relation to the top of the document.
Width	Sets the width of the the barcode.
Height	Sets the height of the the barcode.

Options	

Symbology	Sets the symbology of the barcode:
	    • **PDF417** is a stacked linear barcode.
	    • **QR Code** is a square barcode that compatible devices can read.

	• **Data Matrix** is similar to **QR Code. Data Matrices** hold less information but they are more secure.
Compress Data	**Yes	No** If set to **Yes** then scanned data will be compressed into a .zip archive. This is not recommended for mobile scanners as they are usually incompatible with with .zip files.
ECC Level	The **ECC** (Error Correction Capability) **Level** compensates for damage to barcodes. A higher **ECC** level results in a higher degree of data retention in the event of damage but also requires more space.
X Dimension	Sets the barcode size.
Y/X Ratio	Sets the ratio of the barcode axes in **PDF417** symbology.

Actions	
Mouse Down	Initiates an action when the left mouse button is pressed.
Mouse Up	Initiates an action when the left mouse button is clicked.
Mouse Enter	Initiates an action when the pointer is hovered over the barcode.
Mouse Leave	Initiates an action when the pointer moves beyond the barcode.
On Focus	Initiates an action when keyboard focus is on the barcode.
On Blur	Initiates an action when keyboard focus leaves the barcode.
Please note	Click the ellipsis icon (three dots) on the right to <u>determine actions</u> [512] in all options.

Value Calculation	
Calculation	Sets the calculation type as outlined below.
Encode Using Tab Delimited Format	**Fields |** Click the ellipsis icon (three dots) on the right to add fields to the barcode. **Include Field Name |** If set to **Yes** then field names are included in scanned data. **Reference |** Data entered at this point is used in a 'reference capacity' - for example a note of the file from which the information in the barcode came.
Encode Using XML Format	**Fields |** Click the ellipsis icon (three dots) on the right to add fields to the barcode. **Reference |** Data entered at this point is used in a 'reference capacity' - for example a note of the file from which the information in the barcode came.
Custom Script	**Calculation Script | Run a Javascript** Click the ellipsis icon (three dots) on the right to determine script 517 to add to the barcode.

Commenting Toolbar

Commenting Toolbar

The **Commenting Toolbar** contains options for editing and adding comments to the active document:

The **Edit Comments** tool is used to edit existing comments. Select the tool to enable it. The pointer can then be used to select a group of comments. Selected areas can be dragged and relocated. Use the yellow handles to resize the group of comments. Use the green handles to rotate the group of comments. Double-click the text area to edit individual comments.

The **Typewriter** tool is used to add comments to active documents. The text from this tool is not constricted by bounding boxes. Use the pointer to determine a box inside which the typewriter text features, then enter the desired text. When this tool is active, the **Typewriter Tool Properties** pane opens. This pane can be used to determine the parameters of text created with the typewriter tool.

The **Text Box** tool is used to place text boxes within the active document.

The **Callout** tool is used to place a callout annotation.

The **Highlight Text** tool is used to add highlight annotations to existing text.

The **Strikeout** tool is used to strike out existing text.

The **Underline** tool is used to underline existing text.

The **Sticky Note** tool is used to apply a sticky note annotation to the active document.

The **Attach File** tool is used to embed and create a link to items within the active document.

The **Sound** tool is used to add sounds to the active document.

The **Line** tool is used to place a line annotation within the active document.

The **Arrow** tool is used to place an arrow annotation within the active document.

The **Oval** tool is used to place an oval annotation within the active document.

The **Rectangle** tool is used to place a rectangle annotation within the active document.

The **Polyline** tool is used to place a polyline annotation within the active document.

The **Polygon** tool is used to place a polygon annotation within the active document.

The **Cloud** tool is used to create a closed cloud within the active document. Click to add new segments. Double-click or return to the starting point to complete the cloud.

The **Stamp** tool is used to place stamps within the active document. Use the Stamps Palette [498] to select/edit stamps.

The **Pencil** tool is used to draw in pencil on the active document.

The **Eraser** tool is used to remove pencil markings.

When these tool are being used, customizable options are available in the **Properties Toolbar.** See here [391] for an explanation of these options.

Measurement Toolbar

Measurement Toolbar

The **Measurement Toolbar** contains options for measuring specific elements of the active document:
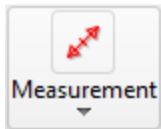
 Click the icon to enable the following options:

 The **Distance** tool is used to measure the distance between two points of the active document. Click the icon to launch the tool. When it is selected the pointer is replaced with a crosshairs icon. Click a location within the active document to designate a starting point from which to measure. A red arrow will appear and the **Distance Info** information box will display in the lower right corner of the active window. Drag the crosshairs to the location within the active document to which the measurement is to be made. The distance from the first point will be displayed as the icon is moved. Further details are available in the information box. Click to determine the distance that is measured. The leader line is then established. Click again to set the leader line as the final distance to be measured. Alternatively, move the leader line either up or down to relocate it at a parallel position within the document. When a final line is established further options are enabled. Right click on the line to open the following menu:
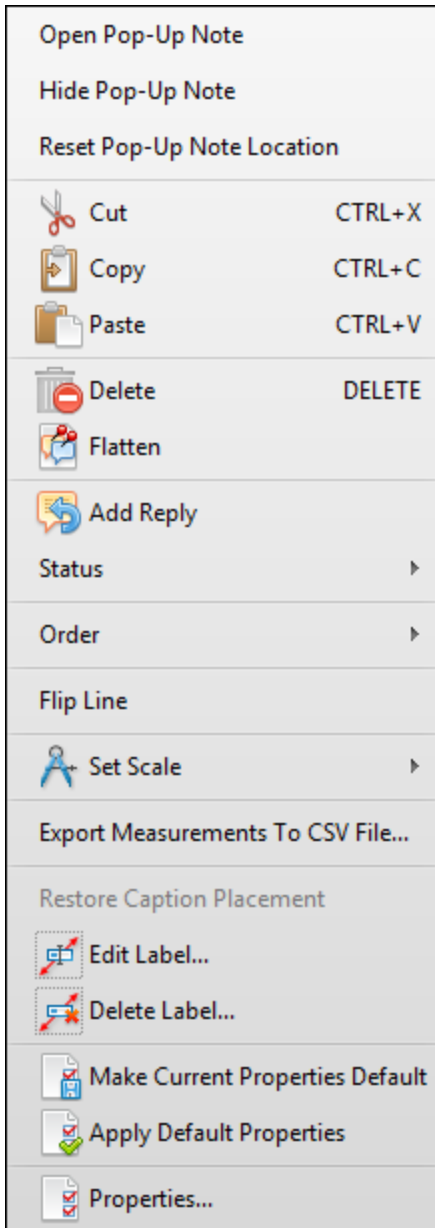
Figure 1. Distance Options

- Click **Open Pop-Up Note** to add a pop-up note to the active document. It will appear as follows:
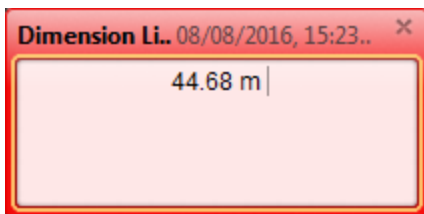
Figure 2. Pop-up Note

- The current user name, date of pop-up creation and length of the line to which the pop-up relates are added to the pop-up note automatically.
- Click **Hide Pop-Up Note** to hide the pop-up note.
- Click **Reset Pop-Up Note Location** to relocate the pop-up note. Click and hold on the leader line, then drag it to the desired location.
- Click **Cut, Copy, Paste** or **Delete** to perform these actions on the leader line.
- Click **Flatten** to flatten the leader line and therefore disable further editing of the pop-up-note it includes.
- Click **Add Reply** to add a custom reply to the pop-up note.
- Click **Status** to define the status of the leader line.
- Click **Order** to determine the order of leader lines when they overlap.
- Click **Flip Line** to rotate the leader line through one hundred and eighty degrees.
- Click **Set Scale** to determine the scale used for the leader line. Select a predefined scale from the list. Predefined scales can be cloned and then customized using the **Manage Measures** menu. Alternatively, use the **Calibrate Measurement** option to define a new scale.
- Click **Export Measurements To CSV File** to export the data of the active document's measurements comments to a .CSV (Excel) file.
- Click **Restore Caption Placement** to restore the placement of a caption to a previous location.
- Click **Edit Label** to edit the contents of the pop-up. Custom text can then be entered. It will display in both the pop-up and the active document.
- Click **Delete Label** to delete the label.
- Click **Make Current Properties Default,** after properties have been changed, to save existing properties as the default setting.
- Click **Apply Default Properties** to revert the properties of the **Distance** tool to the default setting.
- Click **Properties** to open the **Dimension Line Properties** dialog box and view specifics of the selected line.

The **Perimeter** tool is used to measure the distance between multiple points. Click the icon to launch the tool. When it is selected the pointer will be replaced with a crosshairs icon. Click at a location within the active document to designate a starting point from which to measure. A red line will appear and the **Perimeter Info** information box will display in the lower right corner of the active window. Drag the crosshairs to the location within the active document to which the first measurement is to be made. Click again to define the first line of the perimeter. Repeat the process until the perimeter is complete and then double-click to define the final point. When a final point is established further options are enabled. Right click on the perimeter line to open the menu detailed above with the **Distance** tool. There is an additional option to **Control Points.** This feature can be used to delete selected points or add new points.

The **Area** tool is used to measure the area within line segments. Click the icon to launch the tool. When it is selected the pointer will be replaced with a crosshairs icon. Click at a location

within the active document to designate a starting point from which to measure. A red line will appear and the **Area Info** information box will display in the lower right corner of the active window. Drag the crosshairs to the location within the active document to which the first measurement is to be made. Click again to define the first line of the area. Repeat the process until the area is complete and then double-click to define the final point. When a final point is established further options are enabled. Right click on the area line to open the menu detailed above with the **Distance** tool. There is an additional option to **Control Points.** This feature can be used to delete selected points or add new points. The **Order** option is disabled.

When the **Measurements** tools are being used, customizable options are available in the **Properties Toolbar.** See here ³⁹¹ for an explanation of these options.

Document Options Toolbar

Document Options Toolbar

The **Document Options Toolbar** is located in the lower left corner of the main window and appears as follows:
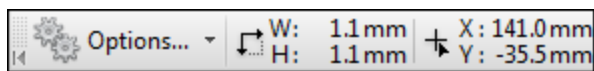
Figure 1. Document Options Toolbar

- Click the **Options** icon to access the options detailed in *(figure 2)* below.
- There are two sets of dimensions displayed on the right of the toolbar. This is the **Page Measurement Info.** The dimensions of the document over which the pointer is located are shown on the left. The coordinates of the pointer in relation to the document are shown on the right.
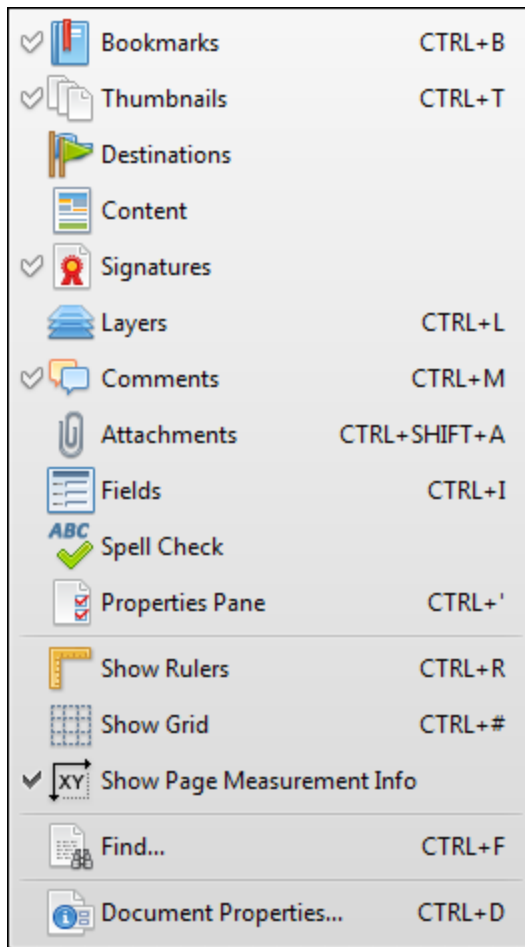
Figure 2. Document Options Menu

- Click **Bookmarks** to open the **Bookmarks** pane, which is explained here. 397
- Click **Thumbnails** to open the **Tumbnails** pane, which is explained here 400 400
- Click **Destinations** to open the **Destinations** pane, which is explained here. 404
- Click **Content** to open the **Content** pane, which is explained here. 404
- Click **Signatures** to open the **Signatures** pane, which is explained here. 462
- Click **Layers** to open the **Layers** pane, which is explained here. 406
- Click **Comments** to open the **Comments** pane, which is explained here. 405
- Click **Attachments** to open the **Attachments** pane, which is explained here. 405
- Click **Fields** to open the **Fields** pane, which is explained here. 405
- Click **Spell Check** to check the spelling of the active document. Further details are available here. 470
- Click **Properties** to open the **Properties** pane, which is explained here. 405
- Click **Show Rulers** to view/hide the document rulers. Further details are available here. 409
- Click **Show Grid** to insert a grid over the active document. This feature is intended for use with the Snapping Tool. 410
- Click **Show Page Measurement Into** to determine whether or not the **Page Measurement Info** is displayed. (The **Page Measurement Info** is explained above at the **Document Options** entry above).

- Click **Find** to launch the find text function for the active document. This is explained here. 255
- Click **Document Properties** to launch the **Document Properties** dialog box, which is explained here. 243

Document Navigation Toolbar

Document Navigation Toolbar

The **Document Navigation Toolbar** is located in the center of the lower section of the main window and appears as follows:
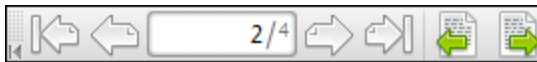
Figure 1. Document Navigation Toolbar

- Click the white arrow icons to move to the first page, previous page, next page or last page of the active document.
- Click the green arrow icons to move between the most recent views of documents.
- The number box at the center of the **Document Navigation** toolbar shows the current page and the total number of pages in the active document.

Page Layout Toolbar

Page Layout Toolbar

The **Page Layout Toolbar** is located in the lower right corner of the main window and appears as follows:

Figure 1. Page Layout Toolbar

- The Page Layout options determine how pages of active documents are displayed in the main window. The layouts correspond to those displayed in the icons of the toolbar. Further options relating to the page display are available here. 266

Launch Application Toolbar

Launch Application Toolbar

The **Launch Application Toolbar** is located on the right of the **Page Layout Toolbar.** It appears as follows:

Figure 1. Launch Application Toolbar

- This toolbar provides a convenient way to open active documents using third party applications. Instructions on how to add applications to this toolbar are available here. 319

Properties Toolbar

Properties Toolbar

The **Properties Toolbar** is located beneath the **Shortcut Toolbar.** This toolbar becomes active when a modifiable object in a PDF is selected. The options in the **Properties Toolbar** depend on the type of object selected. They determine the size, color and further specifics depending on the active tool/feature. All available options are detailed below:

- **Align** and **Justify** restructures the layout of bodies of text. **Align** determines the location of text and **Justify** straightens the margins.
- **Auto Adjust Arm Position** is available when using the **Callout** tool. When enabled it connects automatically the base of the callout arrow to the nearest point of the object in relation to the arrow. When disabled the base of the callout arrow remains in its original location.
- **Apply Default Text Format** applies the current default text style to selected text.
- **Blend Mode** determines the method through which the object's shape blends with underlying content.
- **Bold, Italic** and **Underline** transform text as their titles indicate.
- **Border Style** determines the style of the border when text boxes are created.
- **Border Width** determines the width of borders.
- **Clear Text Formatting** removes all current text formatting.
- **Diameter** determines the diameter of the eraser when using the **Eraser** tool.
- **Exclusive Mode** determines that the active tool ignores existing comments/annotations on the current document. This means that new elements can be placed in the active document without activating existing elements when they overlap. It also permits access to objects or base content beneath existing annotations.
- **Fill Color** determines the text color
- **Font** determines the text font.
- **Font Size** determines the font size.
- **Grow Font** and **Shrink Font** provide convenient ways to increase/decrease the font size incrementally.
- **Icon** determines the icon of the selected object.
- **Keep Selected** determines whether or not the current tool remains selected after it is used.
- **Line Starting/Ending Style** determines the shape and style of line endings.
- **Make Current Text Format as Default** updates the default text setting to the current settings.
- **Opacity** determines the transparency of the object currently selected.

- **Properties** opens the **Page Content Properties** dialog box, where specifics about the active document can be viewed.
- **Stroke Color** determines the color of the border of the selected object.
- **Scale** determines the scale ratio when using the **Measurement** tools.
- **Subscript** and **Superscript** change the location and size of text as per the layouts used for mathematical formulae and chemical compounds.

Customize Toolbars

Customize Toolbars

Click **Customize Toolbars** to launch the following dialog box:
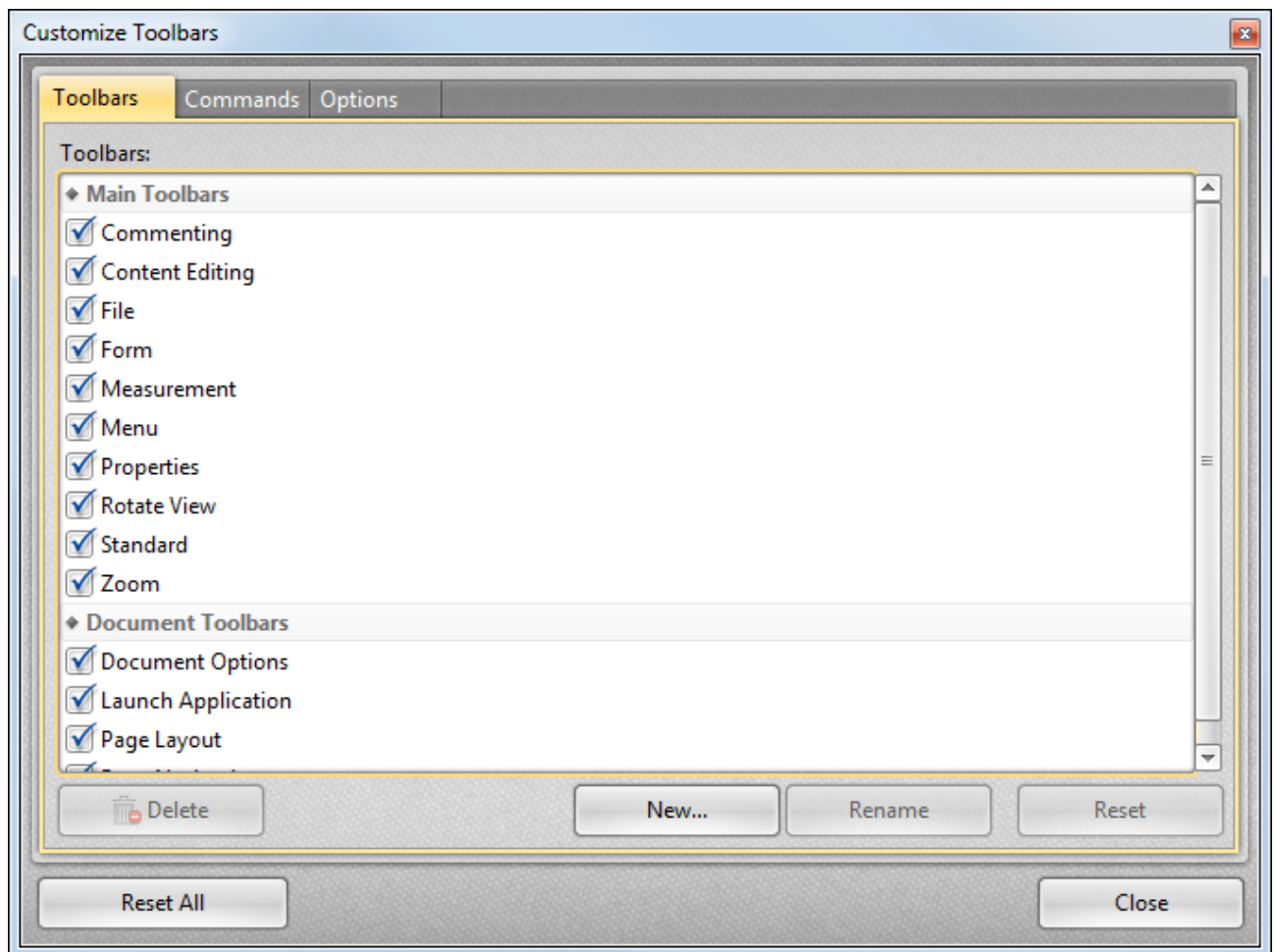
Figure 1. Customize Toolbars Dialog Box. Toolbars Tab Selected

All available toolbars are displayed in the **Toolbars** tab.

- Clear the check boxes to disable the associated toolbars and remove them from the main window of the application.

- Click **Delete** to delete toolbars.
- Click **New** to create a new toolbar. The **New Toolbar** dialog box will open. Enter a title for the new toolbar. Commands can then be added to the toolbar. (See below for further information about commands).
- Click **Rename** to rename custom toolbars.
- When changes have been made to the content or layout of toolbars, click **Reset** to restore the original version. Click **Reset All** to reset all modified toolbars.
- Click **Close** to close the dialog box.

All available commands are displayed in the **Commands** tab:
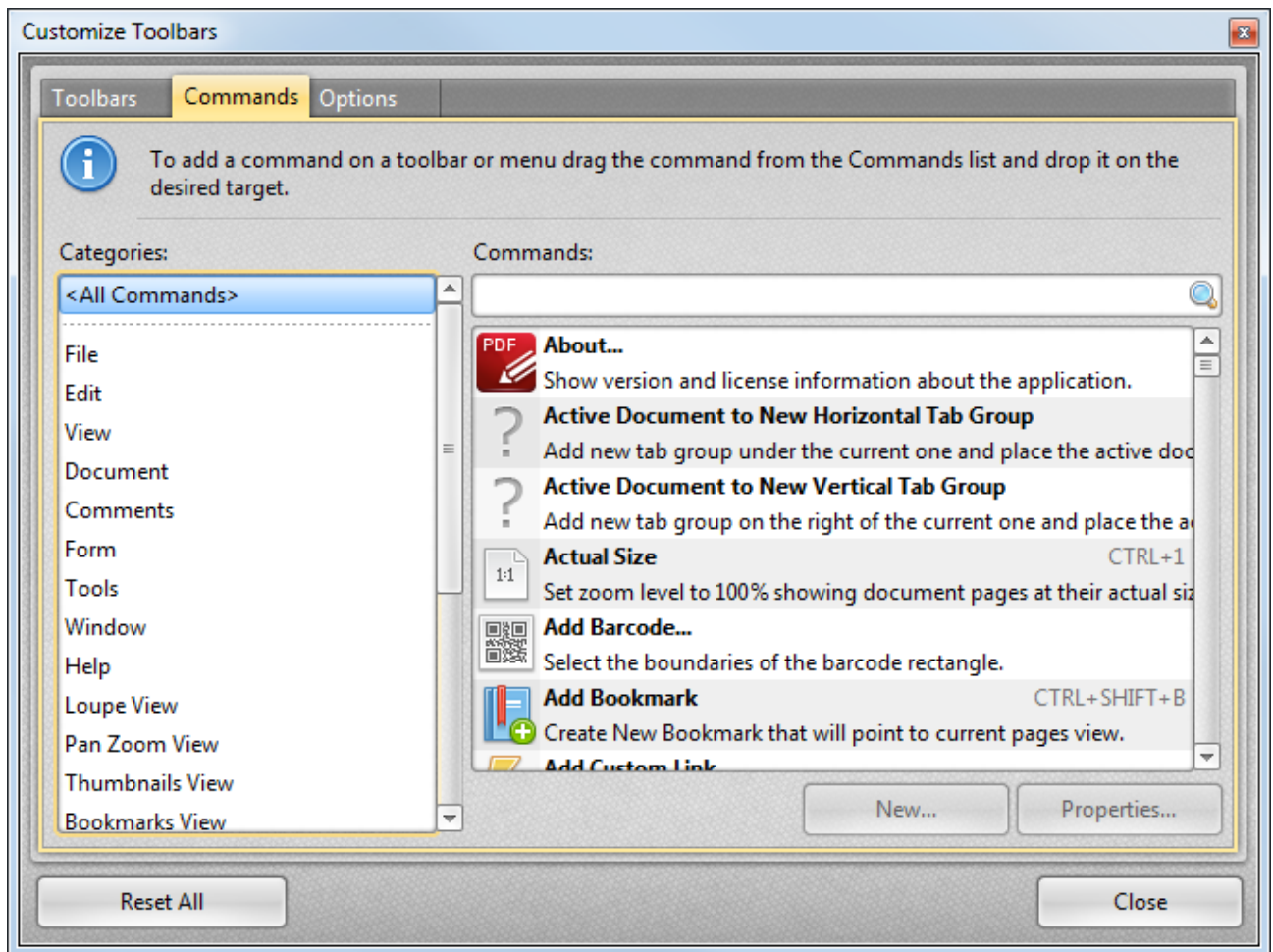
Figure 2. Customize Toolbars Dialog Box. Commands Tab Selected

- Use the **Categories** toolbar to determine the group of commands displayed in the viewing pane.
- Use the **Commands** text box to search for commands.
- Click and drag feature icons from other toolbars to add them to custom toolbars for convenient use.
- Click **Properties** to view properties and further settings of commands.

Click the **Options** tab for further options that relate to toolbars. The following options will be displayed:
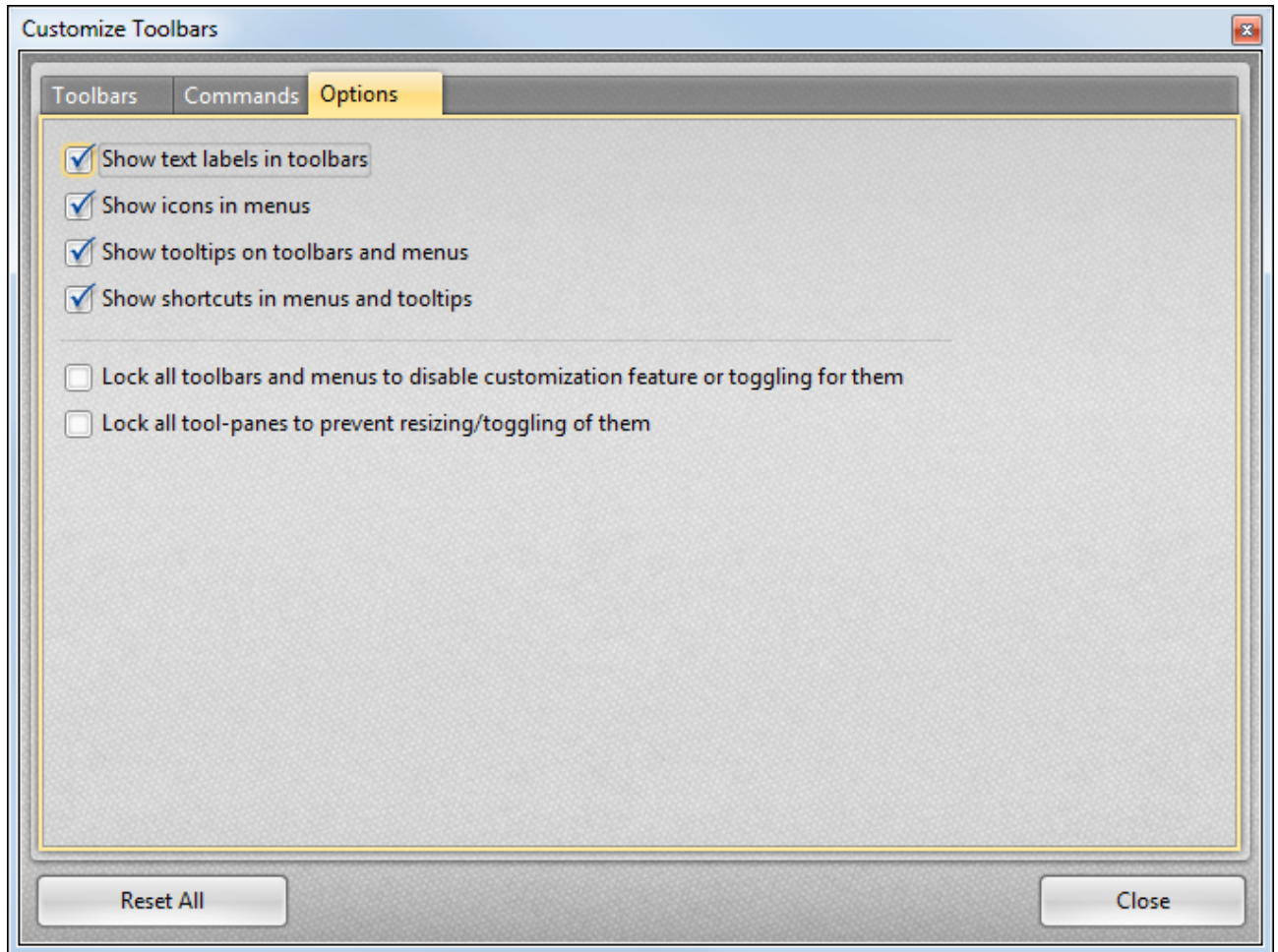
Figure 3. Customize Toolbar Options

- Select the boxes as required.

Rotate View

Rotate View

These options rotate the active document as follows:

 Rotate Counterclockwise rotates the active document counterclockwise. Documents will be rotated ninety degrees each time the icon is clicked.

 Rotate Clockwise rotates the active document clockwise. Documents will be rotated ninety degrees each time the icon is clicked.

Bookmarks

Bookmarks

Bookmarks are used to designate specific places of importance within documents. Click this option to view/hide the bookmarks pane. The following dialog box will open:
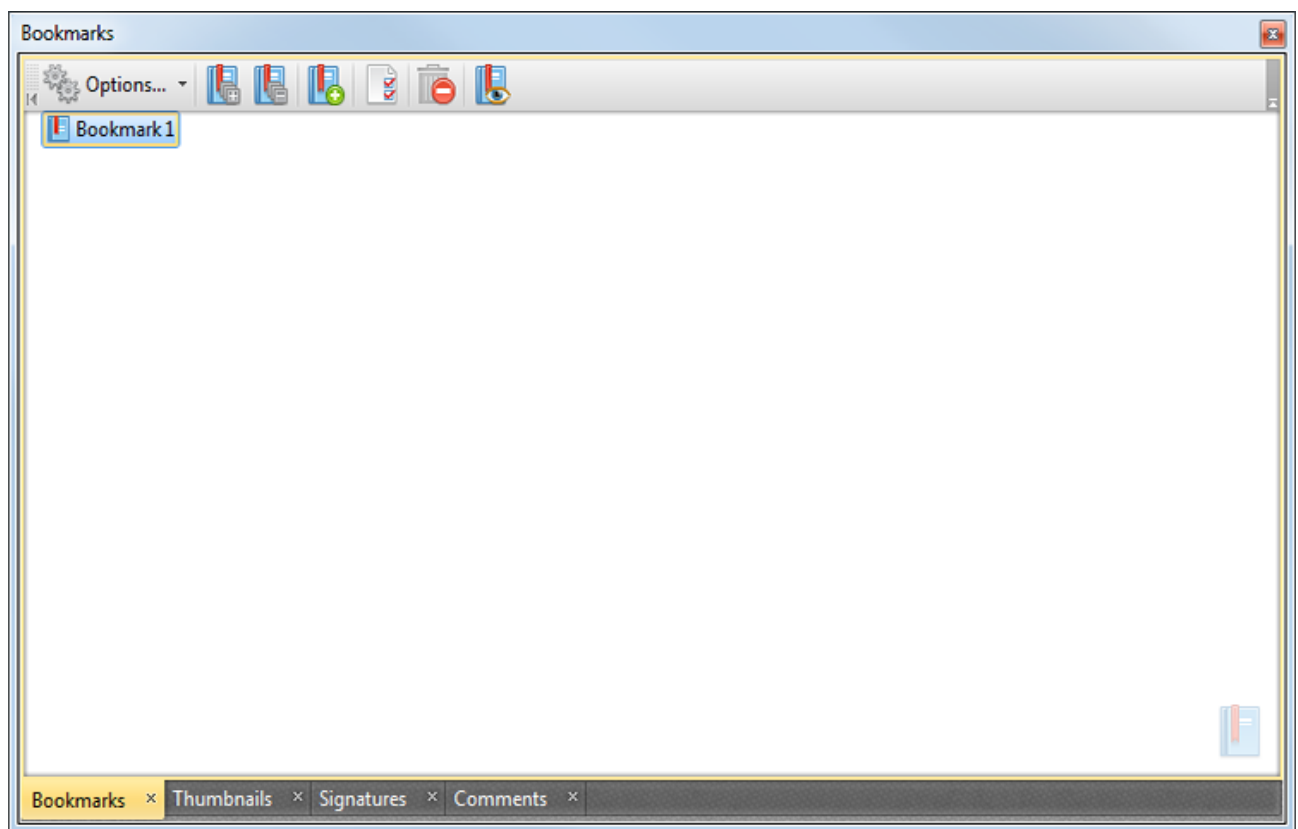
Figure 1. Bookmarks Pane

All bookmarks contained within the active document are displayed in the **Bookmarks** pane. Click the icons to activate the following features:

 Expand All Bookmarks to expand all bookmarks.

 Collapse All Bookmarks to collapse all bookmarks.

 New Bookmark to create a new bookmark.

![icon] **Properties** to view the properties of the selected object.

![icon] **Delete** to delete the current selection.

![icon] **Ensure Visibility of Corresponding Bookmark** to expand parent bookmarks in a manner that ensures the visibility of corresponding bookmarks.

- Click **Options** to view bookmark commands. The following options will be displayed:

📄 Go to Bookmark	SPACE
New Bookmark...	INSERT
✂ Cut	CTRL+X
Copy	CTRL+C
Paste	CTRL+V
Delete	DELETE
Rename	F2
Set Destination	
Make Current Properties Default	
Apply Default Properties	
Text Size	▶
✔ Wrap Long Bookmarks	
✔ Show/Hide Icons	
✔ Use Inherited Zoom	
✔ Automatically Expand Bookmarks	
Import Bookmarks...	
Export Selected Bookmarks...	
Export All Bookmarks...	
Properties...	
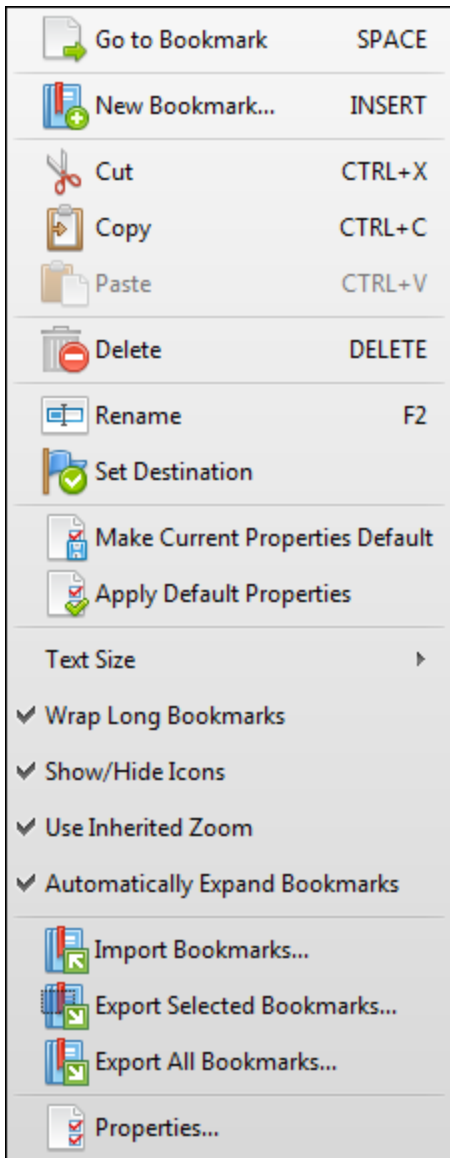
Figure 2. Bookmarks Options

- Click **Go To Bookmark** to move to the bookmark currently selected.
- Click **New Bookmark** to create a new bookmark.
- Click **Cut, Copy, Paste, Delete** and **Rename** to perform these actions on the selected bookmark.

- Click **Set Destination** to change the location of the selected bookmark to the point currently displayed within the active document.
- Click **Make Current Properties Default** to set the properties of the current bookmark as the default setting for all bookmarks.
- Click **Apply Default Properties** to apply the default properties to the bookmark currently selected.
- Click **Text Size** to determine the font size of the bookmark titles within the bookmarks pane.
- Click **Wrap Long Bookmarks** to fit bookmarks with long names to the dimensions to of the **Bookmarks Pane.**
- Click **Show/Hide** icons as desired.
- Click **Use Inherited Zoom** to save the zoom level of the active document when creating bookmarks.
- Click **Automatically Expand Bookmarks** to view all child bookmarks with parent bookmarks.
- Click **Import Bookmarks** to import the bookmarks currently selected.
- Click **Export Selected Bookmarks** to export the bookmarks currently selected.
- Click **Export All Bookmarks** to export all bookmarks within the active document.
- Click **Properties** to view the properties of the selected bookmark in the **Properties** pane.

Further bookmark options are available in the **Advanced** 528 tab.

Thumbnails

Thumbnails

Thumbnails are used as a convenient method to view and manage the pages of a document. Click the **Thumbnails** option to view/hide the **Thumbnails** Pane:
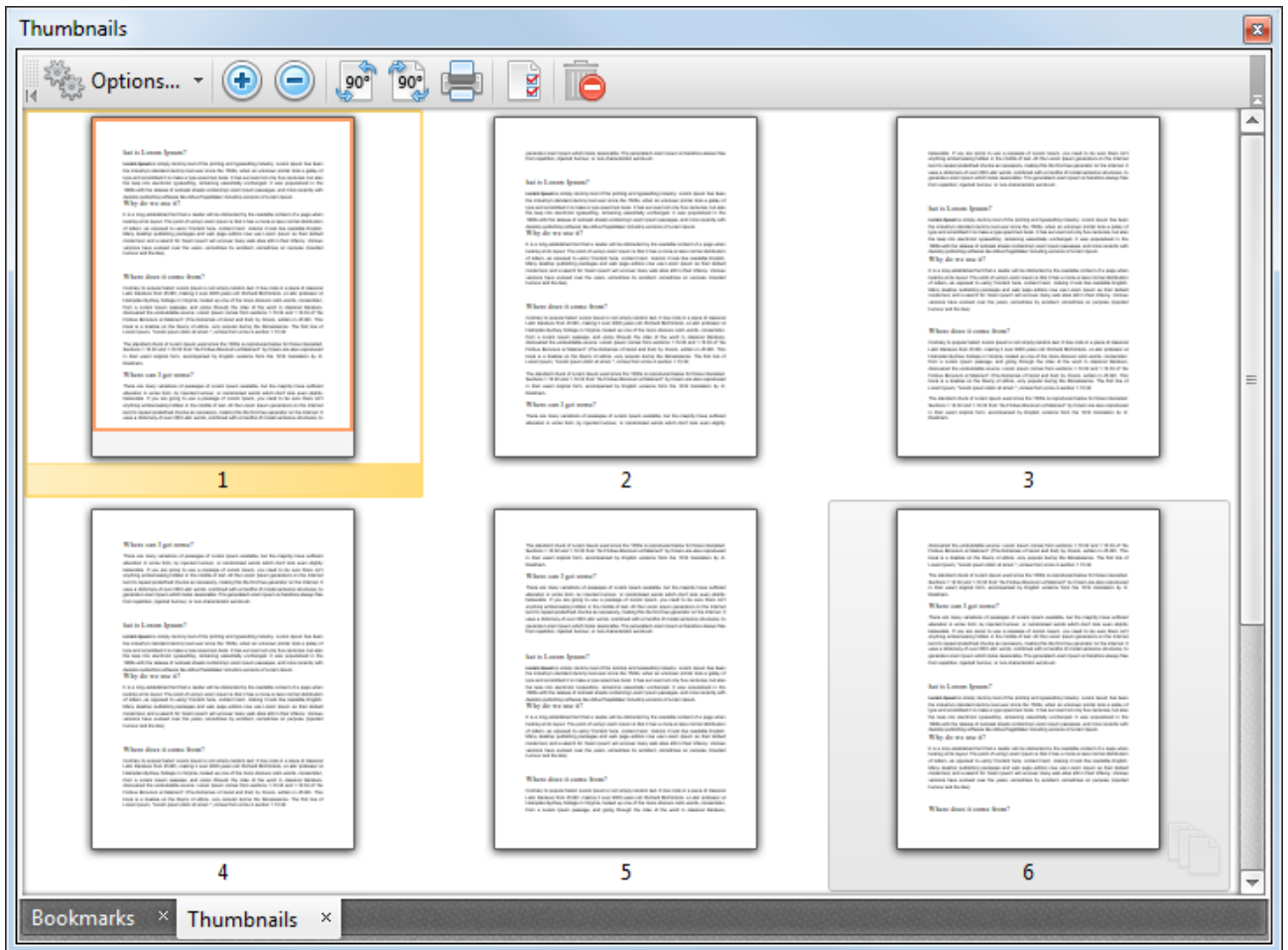
Figure 1. Thumbnails Pane

A smaller representation of the pages of the active document are displayed in the pane.

- The orange box represents the current view.
- Click on specific locations within pages to move to those locations within the active document.

- Press and hold **CTRL** to select multiple pages.
- Page ranges can be created as follows: click the first page of the desired range, then press and hold **SHIFT** and click the final page of the desired range.
- Press **Delete** to delete selected pages.
- Thumbnails from other folders can be dragged into the thumbnails pane in order to add them to the active document.

Click the icons to activate the following functions:

Zoom in Thumbnails to zoom in on the thumbnails pane.

Zoom Out Thumbnails to zoom out on the thumbnails pane.

Rotate Pages CCW 90° to rotate the page currently selected ninety degrees counterclockwise.

Rotate Pages CW 90° to rotate the page currently selected ninety degrees clockwise.

Print to print the current document/pages currently selected

Properies to view the properties of the page currently selected.

Delete to delete the page currently selected.

- Click **Options** to view thumbnail commands. The following options will be displayed:
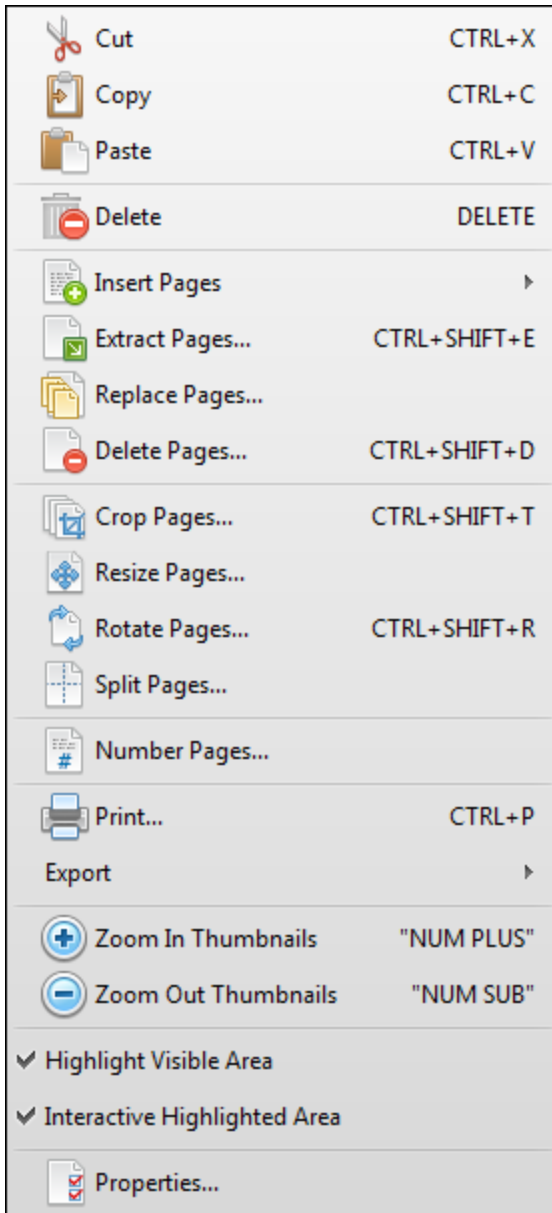
Figure 2. Thumbnails Options

- Click **Cut** to cut and add the current selection to the clipboard.
- Click **Copy** to copy and add the current selection to the clipboard.
- Click **Paste** to paste the contents of the clipboard into the thumbnails pane.
- Click **Delete** to delete the current selection.
- Click **Insert Pages** to view the **Insert Pages** options, which are explained here.[432]
- Click **Extract Pages** to view the **Extract Pages** options, which are explained here.[440]
- Click **Replace Pages** to view the **Replace Pages** options, which are explained here.[444]
- Click **Delete Pages** to view the **Delete Pages** options, which are explained here.[447]
- Click **Crop Pages** to view the **Crop Pages** options, which are explained here.[449]
- Click **Resize Pages** to view the **Resize Pages** options, which are explained here.[452]
- Click **Rotate Pages** to view the **Rotate Pages** options, which are explained here.[454]

- Click **Split Pages** to view the **Split Pages** options, which are explained <u>here.</u> 456
- Click **Number Pages** to view the **Number Pages** options, which are explained <u>here.</u> 458
- Click **Print** to open the **Print** dialog box, which is explained <u>here.</u> 239
- Click **Export** to launch the **Export to Images** dialog box, which is explained <u>here.</u> 236
- Click **Zoom In Thumbnails** to zoom in on the thumbnails pane.
- Click **Zoom Out Thumbnails** to zoom out on the thumbnails pane.
- **Highlight Visible Area** is selected by default. This means the area of the document currently visible in the main window is highlighted in the thumbnails pane. Disable this option to remove the highlight box.
- **Interactive Highlighted Area** is selected by default. This means it is possible to 'grab' pages in the thumbnails pane. Click and hold the ⊕ icon to grab pages. The view in the main window will change according to how the highlighted area is moved.
- Click **Properties** to launch the properties pane for selected pages.

Other Panes

Other Panes

The options in this section are further elements of **PDF-XChange Editor** that can be viewed in the same manner as bookmarks and thumbnails. They are as follows:
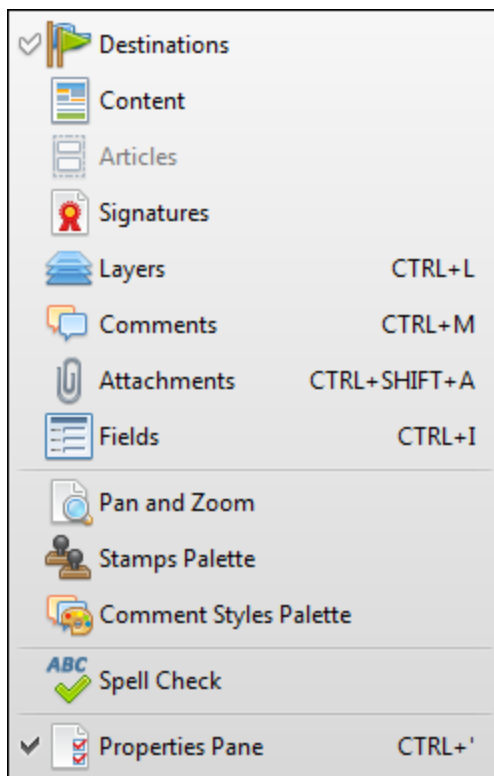
Figure 1. Other Panes Options

- **Destinations** are specific locations within pages. When this option is selected the pane in *(figure 2)* is displayed.
- **Content** launches the **Content** dialog box, which displays a list of the pages within the active document and provides a breakdown of those pages according to their content. Click on entries within the **Content** dialog box to highlight them in the active document.
- **Articles** is not yet available but it will be included in later builds of **PDF-XChange Editor.**
- **Signatures** launches the **Signatures** pane, which provides information relating to signatures within documents. See here 462 for an explanations of these options.

- **Layers** displays additional, optional layers available within documents. When this option is selected the pane in **(figure 3)** is displayed.
- **Comments** launches the **Comments** pane, which displays a list of comments, annotations and markups associated with the active document. Select elements to highlight them within the active document. Select the grouping and display options as desired.
- **Attachments** launches the **Attachments** pane, which details current attachments and facilitates the creation/removal of attachments.
- **Fields** launches the **Fields** pane, which details existing fields within the active document and facilitates their editing.
- **Pan and Zoom** launches the **Pan and Zoom** pane. The blue rectangle represents the current view of the active document. Adjust the edges of the rectangle to manipulate the pan and zoom. Alternatively, use the icons to zoom incrementally, or enter a custom zoom percentage in the number box. Use the arrow icons to move between the pages of the active document. Use the snapshot icon to take snapshots of the current view. When the Snapshot Tool is enabled, click a page to take a screenshot. Alternatively, click and drag the pointer to select a custom rectangular area of the document. Release the button to take the snapshot. When a snapshot is taken, a bitmap copy of the selection is pasted to the clipboard. See here 301 for settings regarding the **Snapshot** Tool.
- **Stamps Palette** launches the **Stamps Palette** pane, which details available stamps. New stamps can be created using this pane. See here 498 for further details.
- **Comment Styles Palette** launches the **Comment Styles Palette**, which displays the commenting tools and facilitates further associated features. See here 484 for more details.
- **Spell Check** launches the **Spell Check** pane, which determines the settings when the **Spell Check** feature is used. See here 470 for further details.
- **Properties** launches the **Properties** pane for the object/tool currently selected.
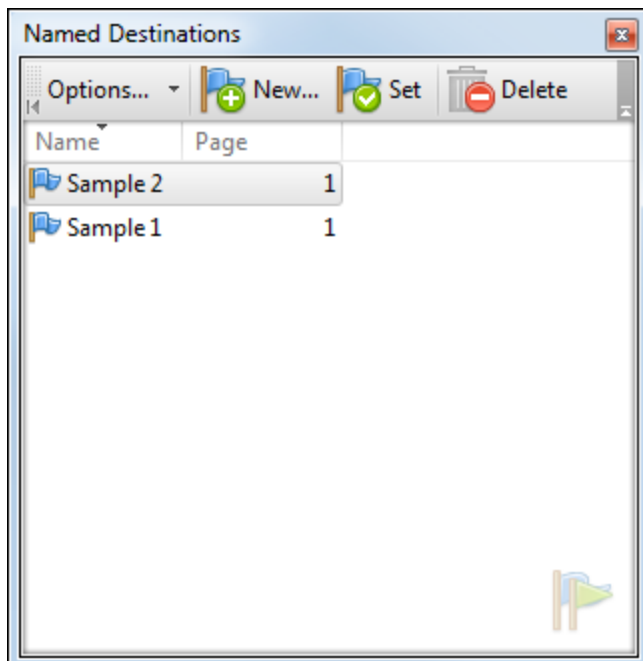
Figure 2. Destinations Pane

- Click **New** to enter a new destination. Enter a name for the destination in the text box.
- Click the **Options** menu for further options:
    - Click **Go To Destination** to go to the destination currently selected.
    - Click **Delete** to delete the selected destination.
    - Click **Rename** to rename the selected destination.
    - Click **Set** to set the current location as the selected destination.
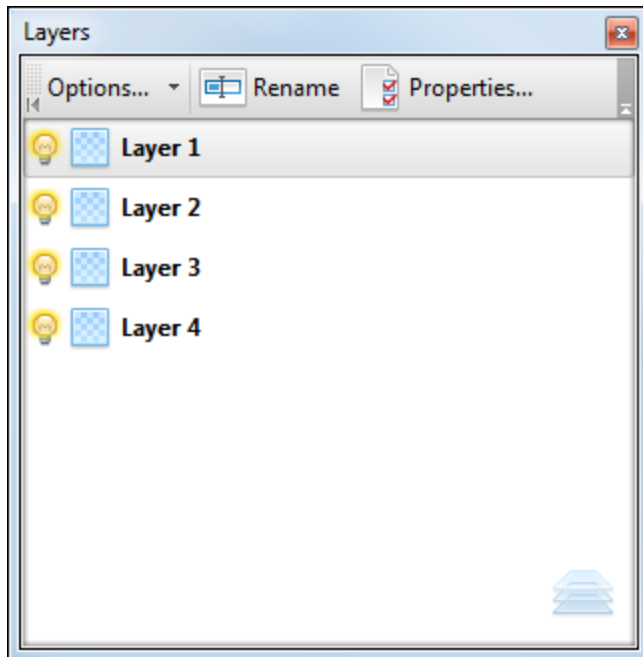
Figure 3. Layers Pane

- Click **Options** to view the options for layers:
    - Click **List Layers for All Pages** to view a list of all layers within the active document.
    - Click **List Layers for Visible Pages** to view a list of all layers within pages currently visible.
    - Click **Reset to Initial Visibility** to revert the document to its initial visibility settings.
    - Click **Apply Layers Overrides** to display all layers, including those not listed in the layers pane.
    - Click **Expand All** to expand all expandable elements of the layers' tree.
    - Click **Collapse All** to collapse all collapsible elements of the layers' tree.
    - Click **Rename** to rename the layer currently selected.
    - Click **Properties** to launch the layers' properties pane.

Page Layout

Page Layout

These options determine the page layout of the active document:

- Select **Single Page** to view a single page at a time.
- Select **Continuous** to view pages in a single, scrolling column.
- Select **Two Pages** to view two pages at a time.
- Select **Two Pages Continuous** to view two pages at a time in scrolling columns.
- Select **Show Gaps Between Pages** as desired.
- Select **Show Cover Page in Two Pages View** to view the cover page separately from the document when viewing documents in either of the two-page layouts.
- Select **Right-to-Left Pages Layout** to view pages in right-to-left format when viewing documents in either of the two-page layouts.
- The **Automatically Scroll** feature is not available in the current build of **PDF-XChange Editor.** It will be available in subsequent builds. However, there is a similar feature available in the current build: when a multiple page document is open, click the scroll wheel on the mouse. An icon will appear that features four arrows. The document will then scroll in the direction that the pointer is moved. Click the scroll wheel again to disable the feature.

Zoom

Zoom

These options determine the manner in which the zoom features in **PDF-XChange Editor** operate:

- Select **Actual Size** to view pages in their actual size. The resulting display will take resolution settings into account.
- Select **Fit Page** to view the full extent of page content regardless of its size.
- Select **Fit Width** to zoom on pages according to their width.
- Select **Fit Height** to zoom on pages according to their height.
- Select **Fit Visible** to zoom on page content so that the width fits the document window without showing white page margins.

Show

Show

These options determine the elements of the active document that are displayed in the main window. The following features are available:

- **Show Rulers** enables/disables rulers along the horizontal and vertical planes in order to facilitate the convenient measurement of elements within the active document.
- **Show Grid** enables/diables a grid behind transparent objects in order to assist in the accurate alignment of text and objects.
- **Show Guides** enables/disables guides, which are used in conjunction with rulers to simplify the process of aligning text and objects. Click and drag from a ruler to launch guides.
- **Show Page Measurement Info** enables/disables the display of the current page size and coordinates of the pointer location, which is shown with the **Document Options Toolbar** on the lower left hand side of the main window.
- **Show Javascript Console** launches the **Javascript Console** pane, which facilitates the addition of javascript elements to the active document. Copy and paste javascript into the pane, then click **Run** to activate it. Further javascript options are available here. 299

Snap

 Snap

The snapping feature of **PDF-XChange Editor** is used to assist in the precise measurement of annotations and comments. When snapping is enabled the pointer automatically moves to a snapping point when it is within the given threshold. There are three options that relate to where the snapping tool operates:

- **Snap to Grid** sets the snapping tool to snap to the grids outlined in the **Show** 409 section.
- **Snap to Guides** sets the snapping tool to snap to the guides outlined in the **Show** 409 section.
- **Snap to Objects** sets the snapping tool to snap to objects within the active document.

Further snapping parameters can be customized here. 292

Go To

Go To

This feature is used to navigate the pages of the active document and any additional open documents. The options are self-explanatory.

Portfolio

Portfolio

These options relate to the settings for PDF Portfolio files, which are PDF files that feature multiple file formats assembled into an integrated PDF unit. **PDF-XChange Editor** has the functionality to open, view and edit PDF Portfolio files. The PDF Portfolio options in the **View** tab relate to the manner in which PDF Portfolio files are displayed within the software:

- **Navigator Layout View** displays the thumbnails of documents contained within the file.
- **Navigator Details View** displays the details of documents contained within the file.
- Select **Show Cover Sheet** to view the portfolio cover sheet.
- Select **Show Navigator** to display the navigator window, which is used to browse through the contents of the portfolio file.
- Click **Preview File** to open the selected file of the portfolio in its default application.
- The **Welcome Page** option is not yet available. It will be available in later builds of **PDF-XChange Editor.**
- **Select All** and **Deselect All** are used to select/deselect all components of the PDF portfolio document.
- Right-click on thumbnails to enable the further option **Extract from Portfolio,** which extracts and saves the contents of the portfolio to a designated folder.

Full Screen Mode

Full Screen Mode

This mode is used to maximize the size of the main window. Alternatively, press **<F11>** to enable this mode.

7.5 Document

Document

When the **Document** Tab is selected, the following menu is displayed:
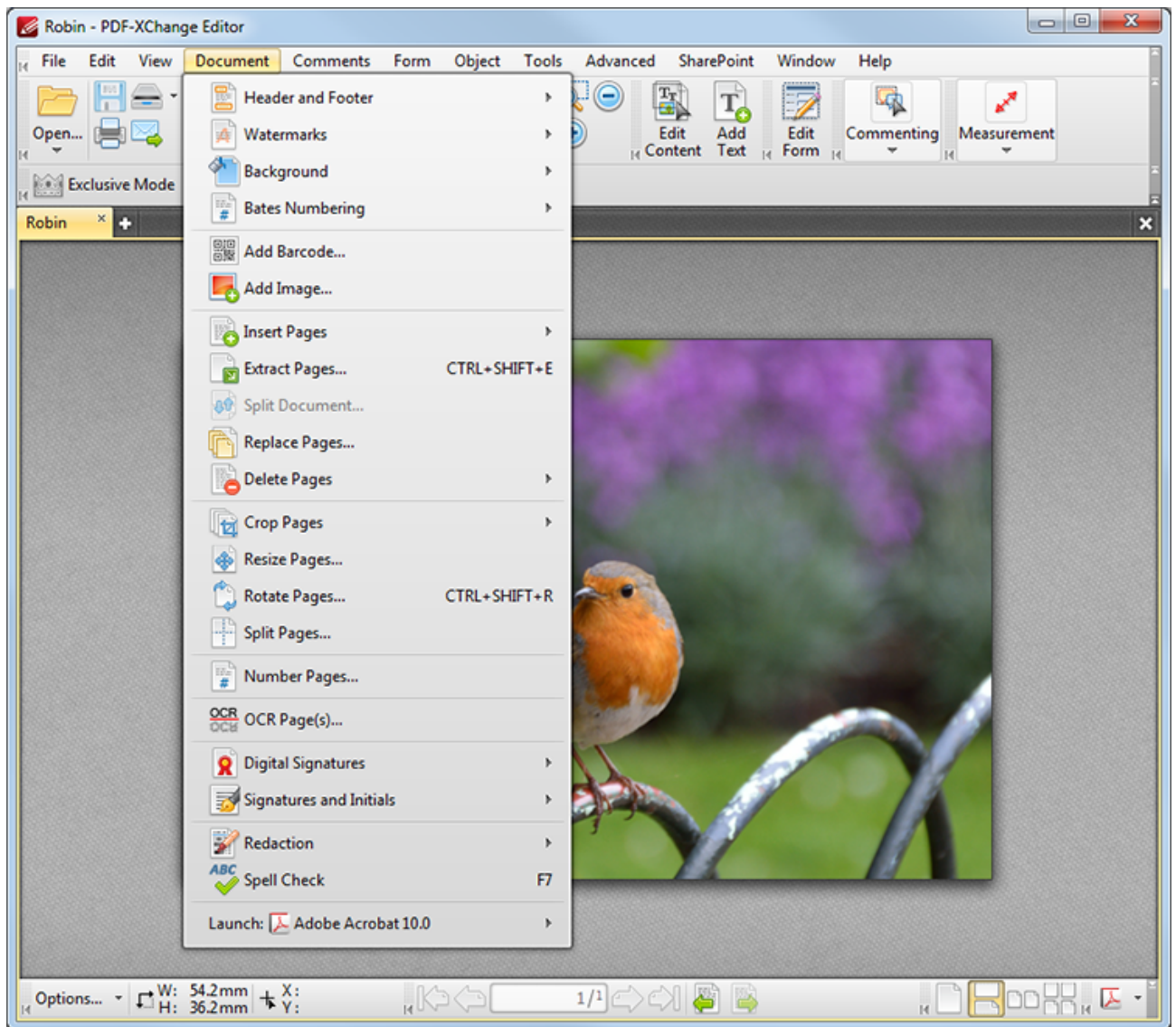
Figure 1. Document Tab Menu

These options are used to edit the active document. Click the links below to access the associated sections of the manual:

Header and Footer

Header and Footer

These options are used to add, remove and manage headers and footers that feature in the active document:

Add

When this option is selected the following dialog box will launch:
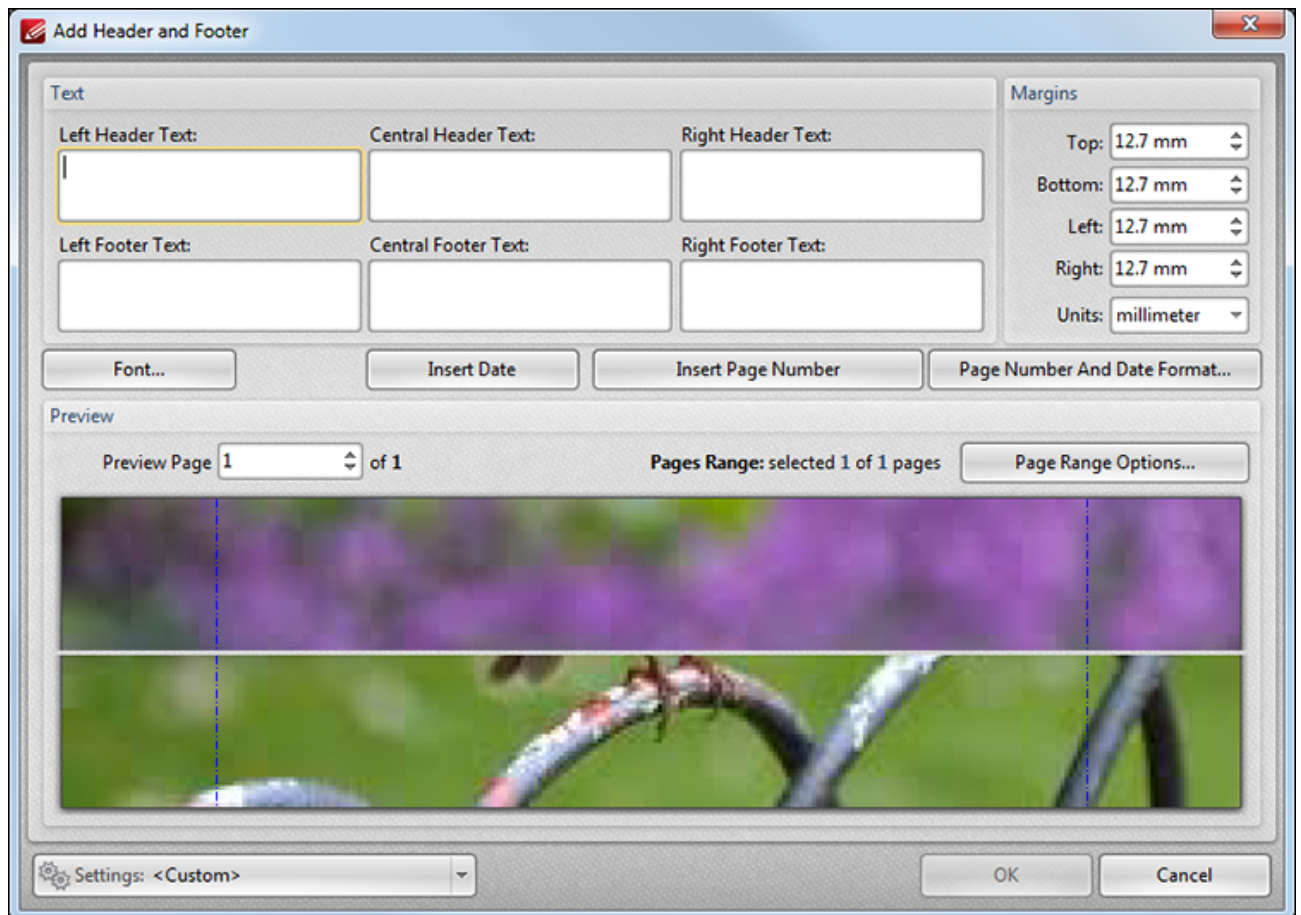
Figure 1. Add Header and Footer Dialog Box

- Enter text into the text boxes to insert text at the locations indicated within documents. Click **Font** and **Insert Date** to select the font settings and/or insert the date at the time of document creation. See here [225] for further information about font settings.
- Click **Insert Page Number** to add page numbers at the selected header/footer location.
- Click **Page Number And Date Format** to customize the date format, page number format and start page number options.
- Enter page numbers into the **Preview Page** box to view pages in the preview window.
- Select the required box for page numbers (**Left Header Text, Left Footer Text** etc) and then click **Insert Page Number** to insert page numbers.
- Click **Page Range Options** to select the pages of the document that will feature the details entered above.

Use the **Settings** menu to save/delete customized settings for subsequent use and/or manage existing customized settings:

- Click [icon] to save customized settings.
- Click [icon] to remove customized settings.
- Click [icon] to manage customized settings that have been saved previously.

- Click **OK** to save settings. Click **Cancel** to revert to previous settings and close the window.

Remove All

Select this option to remove all existing headers and footers from the active document.

Manage

Select this option to manage existing headers and footers. It is then possible to **Add New, Edit, Remove** and **Remove All** headers and footers.

Watermarks

Watermarks

These options are used to add, remove and manage watermarks in the active document. Watermarks are used predominantly to discourage counterfeiting.

Add

When this option is selected the following dialog box will launch:
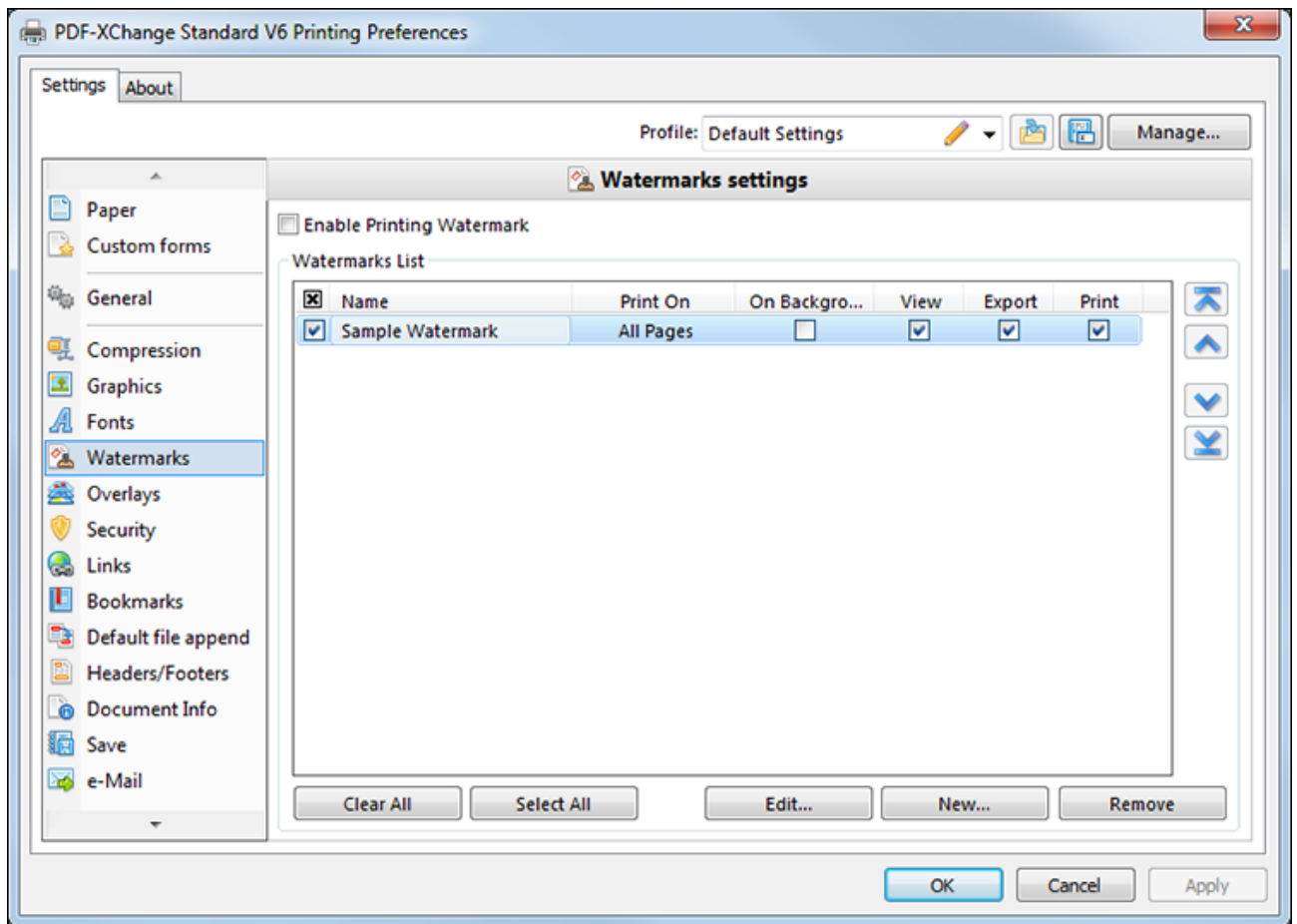
Figure 1. Add Watermark Dialog Box

- The **Source** options determine the source of the watermark. Enter text into the box or select a file. If using text as the source then select the desired font, <u>macro</u> 579 and alignment options.
- The **Appearance** options determine the rotation, opacity and scale of the watermark:
  - The **Rotation** value determines the rotation of the watermark in degrees.
  - The **Opacity** value determines the opacity (transparency) of the watermark.
  - The **Scale** value determines the scale of the watermark in relation to either the target pane, if the indicated box is selected, or the size of the original image, if the box is cleared.
- The **Placement** options determine the horizontal and/or vertical offset of the watermark from the left, right or center of the document.
- Select the **As Background** box to insert the watermark into the background as opposed to the foreground of the document.
- The **Pages Range** options are as follows:
  - Select **All** to add watermarks to every page.
  - Select **Current Page** to add a watermark to only the current page.
  - Use the **Pages** box to determine watermarks for specific pages. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Preview Page** pane displays a preview of pages. Select the numbers beneath the window to preview corresponding pages within the document.

When the desired settings have been entered, click **OK** to create the watermark. Click **Cancel** to cancel the process and close the dialog box.

- The **Settings** menu features two presets: **Draft** and **Confidential**. Select these to update the text that appears behind the document. It can also be used to save customized settings:

- Click to save the current settings.
- Click to delete the custom settings currently selected.
- Click to manage settings that have been saved previously.

Remove All

Select this option to remove all existing watermarks from the active document.

Manage

Select this option to manage preset watermarks. It is then possible to **Add New, Edit, Remove** and **Remove All** watermarks.

Background

Background

These options are used to add, remove and update backgrounds in the active document.

Add

When this option is selected the following dialog box will open:
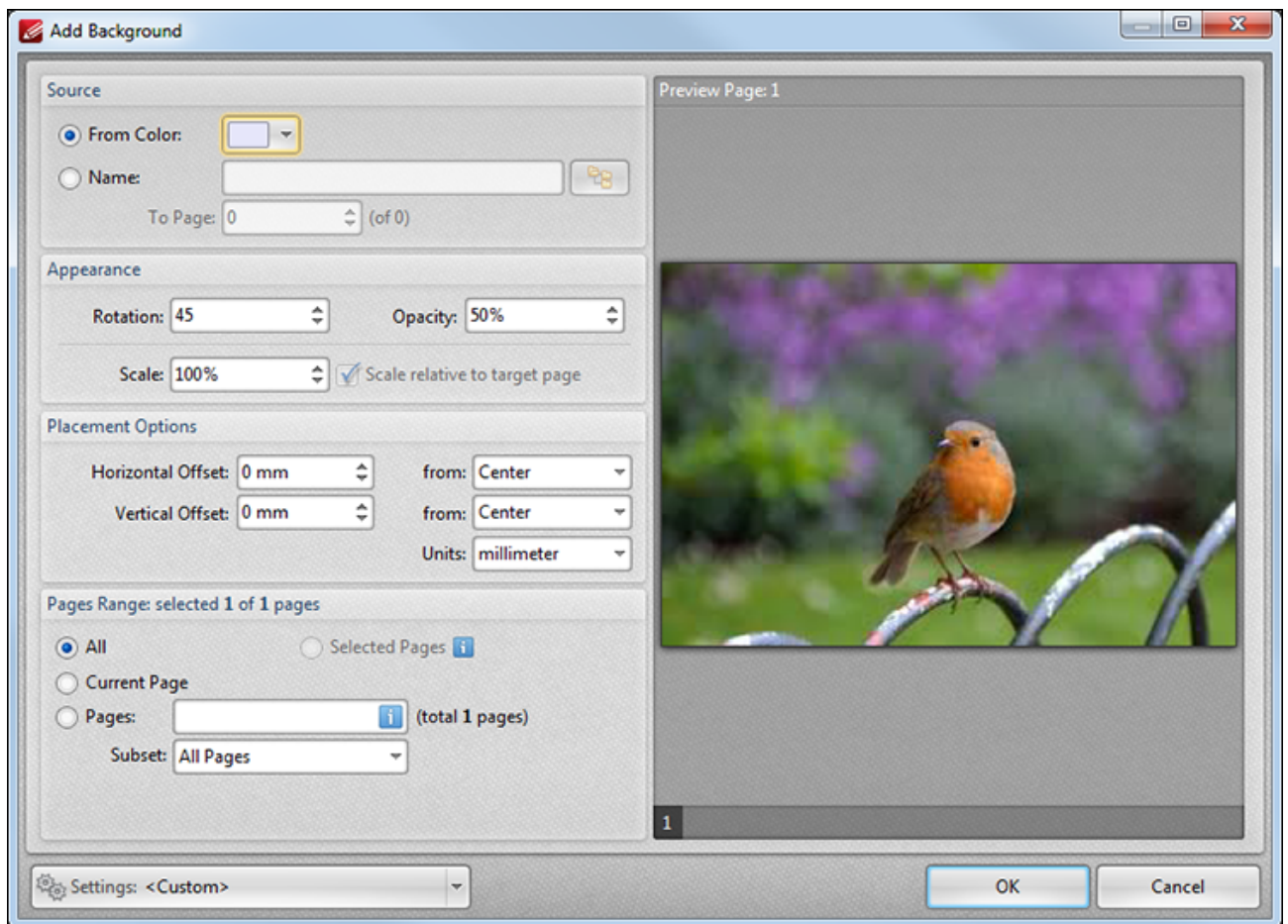
Figure 1. Add Background Dialog Box

When this feature is used a new background is added to the active document.

- The **Source** options determine the source of the background:
    - Select **From Color** to select a color-based background.
    - Select **Name** to enter a file to be used as the background, or click the icon to select a file from the local computer.
    - Use the **To Page** number box to select the page of the document selected in the **Name** section to be used as the background.
- The **Appearance** options determine the rotation, opacity and scale of the background:
    - The **Rotation** value determines the rotation of the background in degrees.
    - The **Opacity** value determines the opacity (transparency) of the background.
    - The **Scale** value determines the scale of the background in relation to either the target pane, if the box is selected, or the size of the original image, if the box is cleared.
- The **Placement** options determine the horizontal and/or vertical offset of the background from the left, right or center of the document.
- Select the **As Background** box to insert the watermark into the background as opposed to the foreground of the document.
- The **Pages Range** options are as follows:
    - Select **All** to add backgrounds to every page.
    - Select **Current Page** to add a background to only the current page.
    - Use the **Pages** box to determine backgrounds for specific pages. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
    - Please note that it is possible to create more than one background for pages within the same document as long as they are not located within the same page/page range.
- The **Preview Page** pane displays a preview of pages. Select the numbers beneath the window to preview corresponding pages within the document.

When the desired settings have been entered, click **OK** to create the background. Click **Cancel** to cancel the process and close the dialog box.

The **Settings** menu can also be used to save customized settings:

- Click ⬛ to save the current settings.
- Click ⬛ to delete the custom settings currently selected.
- Click ⬛ to manage settings that have been saved previously.

When the desired settings have been entered, click **OK** to create the background. Click **Cancel** to cancel the process and close the dialog box.

Remove All

Select this option to remove all existing backgrounds from the active document.

Manage

Select this option to manage existing backgrounds. The **Manage Backgrounds** dialog box will open:

- Click **Add New** to add a new background to the document. The dialog box detailed in *(figure 1)* above will open.
- When backgrounds are selected within the list, click **Edit** to adjust parameters and/or **Remove** to remove backgrounds.
- Click **Remove All** to remove all backgrounds within the list.
- Click **Close** to close the dialog box.

Bates Numbering

Bates Numbering

These options are used to add, remove and manage Bates numbering in the active document. Bates Numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned.

Add

When this option is selected, the following dialog box will launch:
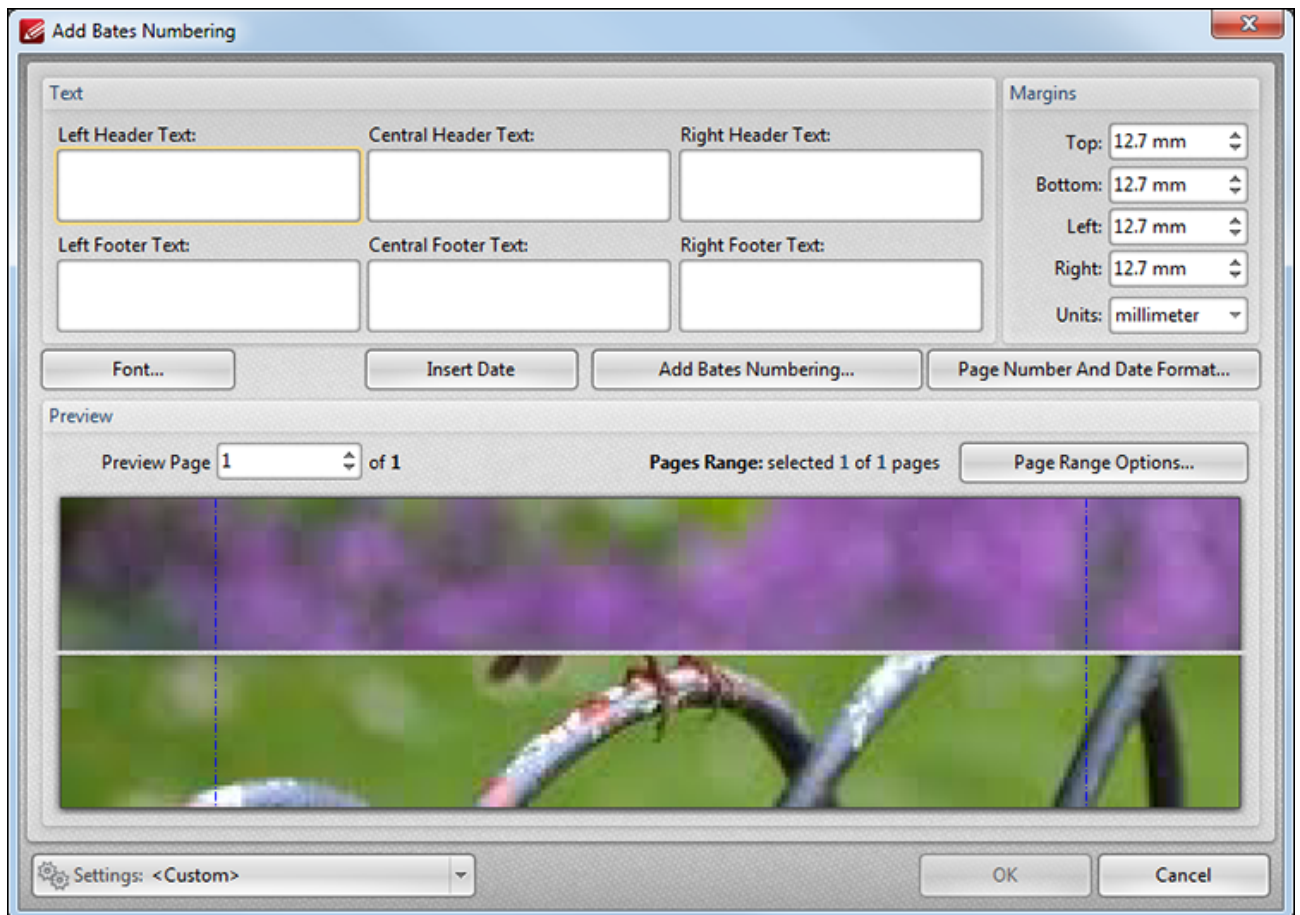
Figure 1. Add Bates Numbering Dialog Box

- Enter text into the text boxes to insert text at the locations indicated within documents. Click **Font** and **Insert Date** to select the font settings and/or insert the date at the time of document creation. See here 225 for further information on font settings.
- Click **Add Bates Numbering** to select Bates Numbering options.
- Click **Page Number And Date Format** to customize the date format, page number format and start page number options for Bates Numbering.
- Click **Margins** to adjust the text location.
- Enter page numbers into the **Preview Page** box to view pages in the preview window.
- Click **Page Range Options** to select the pages of the document that will feature the customized information entered in the steps above.

When the desired settings have been entered, click **OK** to insert Bates Numbering. Click **Cancel** to cancel the process and close the dialog box.

The **Settings** menu can be used to save/delete customized settings for subsequent use and/or manage existing customized settings:

- Click to save the current settings.
- Click to delete the custom settings currently selected.
- Click to manage settings that have been saved previously.

Add to Multiple Files

This option can be used to add Bates numbering to multiple files simultaneously. When it is selected the following dialog box will open:

Figure 2. Add Bates Numbering to Files Dialog Box

- Click **Add Files** to add files from the local computer to the list of source files.
- Click **Add Folder** to add all files from the folder specified to the list of source files.
- Select individual files and then click **Page Range Options** to determine the pages that will feature Bates numbering. Individual pages must be separated with a comma and page ranges must be separated with a dash.
- Select **Replace file names with starting and ending Bates number** as desired.
- Alternatively, select the **File Name** option button and enter a custom file name and destination folder. Click the icon to include macros 579 .
- Select **Overwrite Existing Files** to overwrite old files that have the same name as new files.
- Select **Open folder with results after the numeration** to launch the containing folder when the process is complete.
- Select **Create Log File** as desired. Use the icon to select the folder to which the log file will be saved.
- Click **Options** to determine the Bates numbering options as detailed in **(figure 1)** above.

When the desired settings have been entered, click **OK** to insert Bates Numbering. Click **Cancel** to cancel the process and close the dialog box.

Remove

Select this option to remove existing Bates numbering from the active document.

Manage

Select this option to manage existing Bates numbering within the active document.

Add Barcode

Add Barcode

This option is used to add barcodes to the active document. Barcodes provide useful information that barcode readers and mobile devices such as smartphones and tablets can access. When this option is selected the user will be prompted to select the area within the active document where the barcode will be located. When this area has been designated the following dialog box will launch:
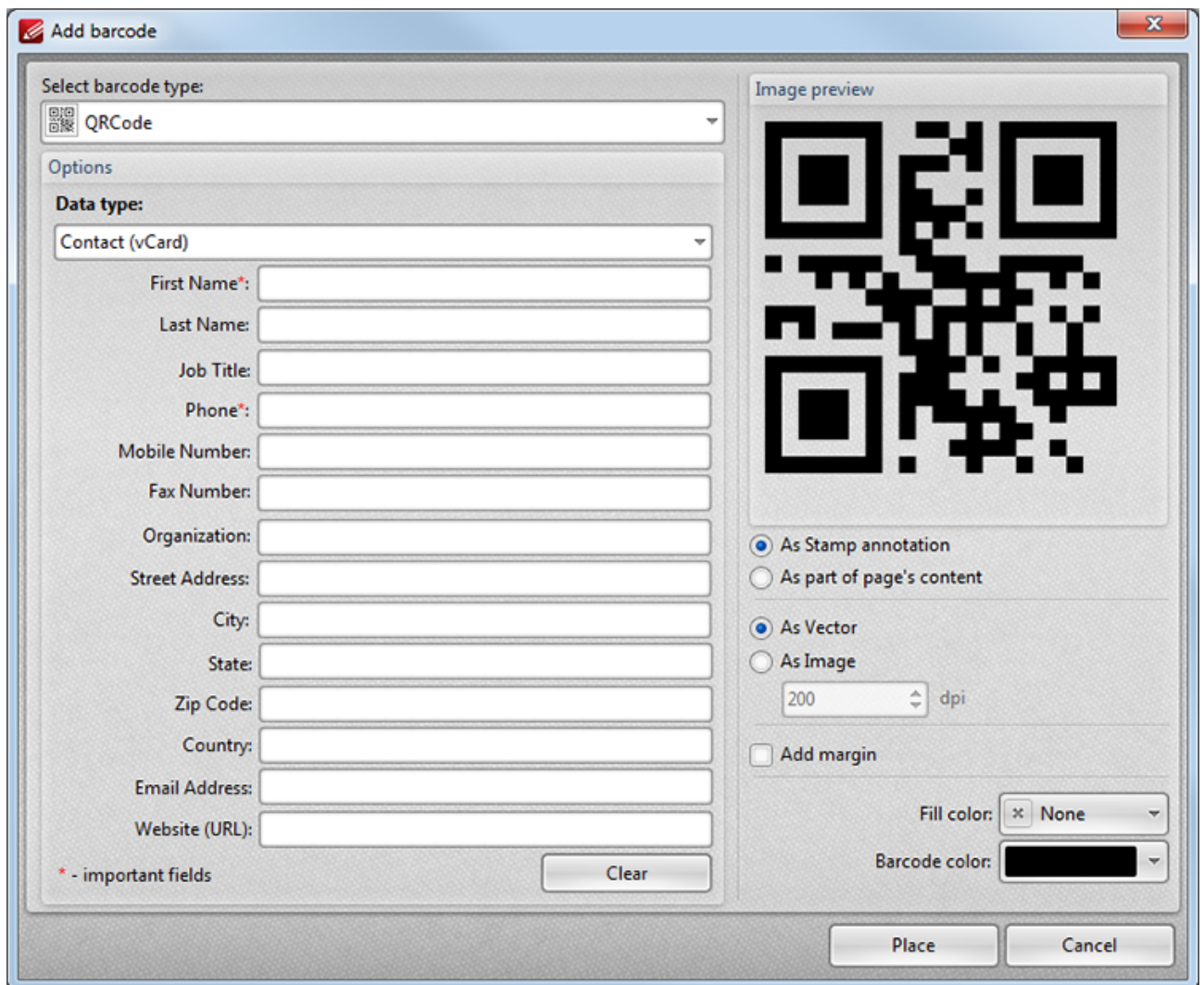
Figure 1. Add Barcode Dialog Box

- Use the **Data type** menu to select the format of the data to be used for the barcode. The choice made at this point determines the remaining options:
  - **Contact (vCard)** is a file format standard for electronic business cards.
  - **URL** is an internet address.
  - **Free Text** allows the user to enter customized text.
  - **Email** can be used to send an email via barcode.
- When details have been entered using the options above, the associated barcode will be generated automatically and can be seen in the preview pane.
- Select an option button to determine whether the barcode will be added **As Stamp annotation** or **As part of page's content**.
- Select an option button to determine whether the barcode will be added **As Vector** or **As Image**.
- Select the **Add Margin** box to add a margin to the barcode.
- Select the required **Fill colour** and **Barcode color**.
- Click **Place** to add the barcode to the image. The data details entered above will then be accessible to users with the technology to read barcodes.
- Click **Cancel** to cancel the process and close the dialog box.

Add Image

Add Image

This option is used to add images to the active document. When it is selected the user will be prompted to select an image from the local computer. After an image has been selected the following dialog box will open:
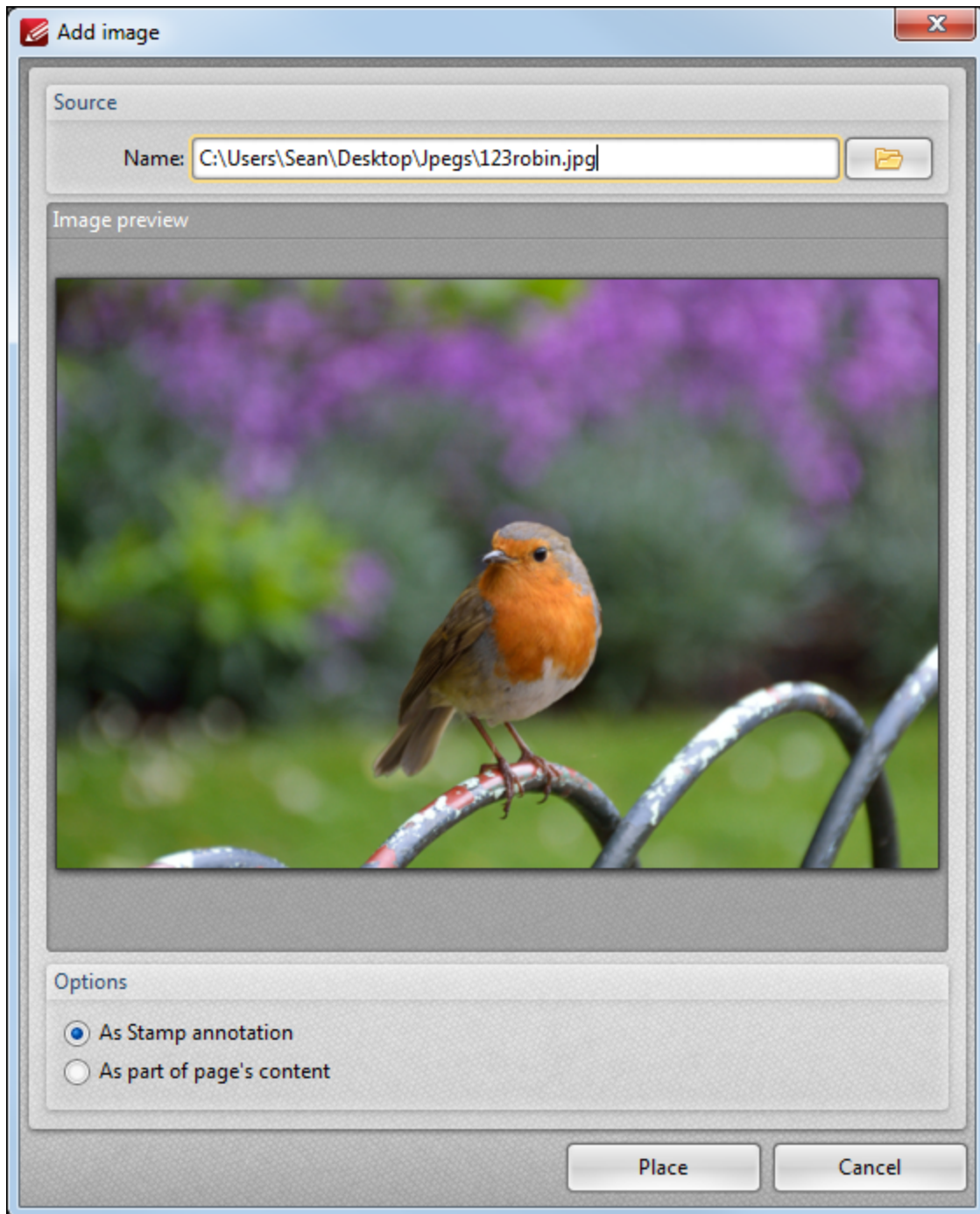
Figure 1. Add image Dialog Box

- Click the folder icon to select an alternative file, if desired.
- Select the manner in which the image is added to the photograph. The options are either **As Stamp annotation** or **As part of page's content.**
- Click **Place** to add the image to the document. Click **Cancel** to cancel the process and close the dialog box.

Insert Pages

Insert Pages

When this option is selected the following dialog box will open:
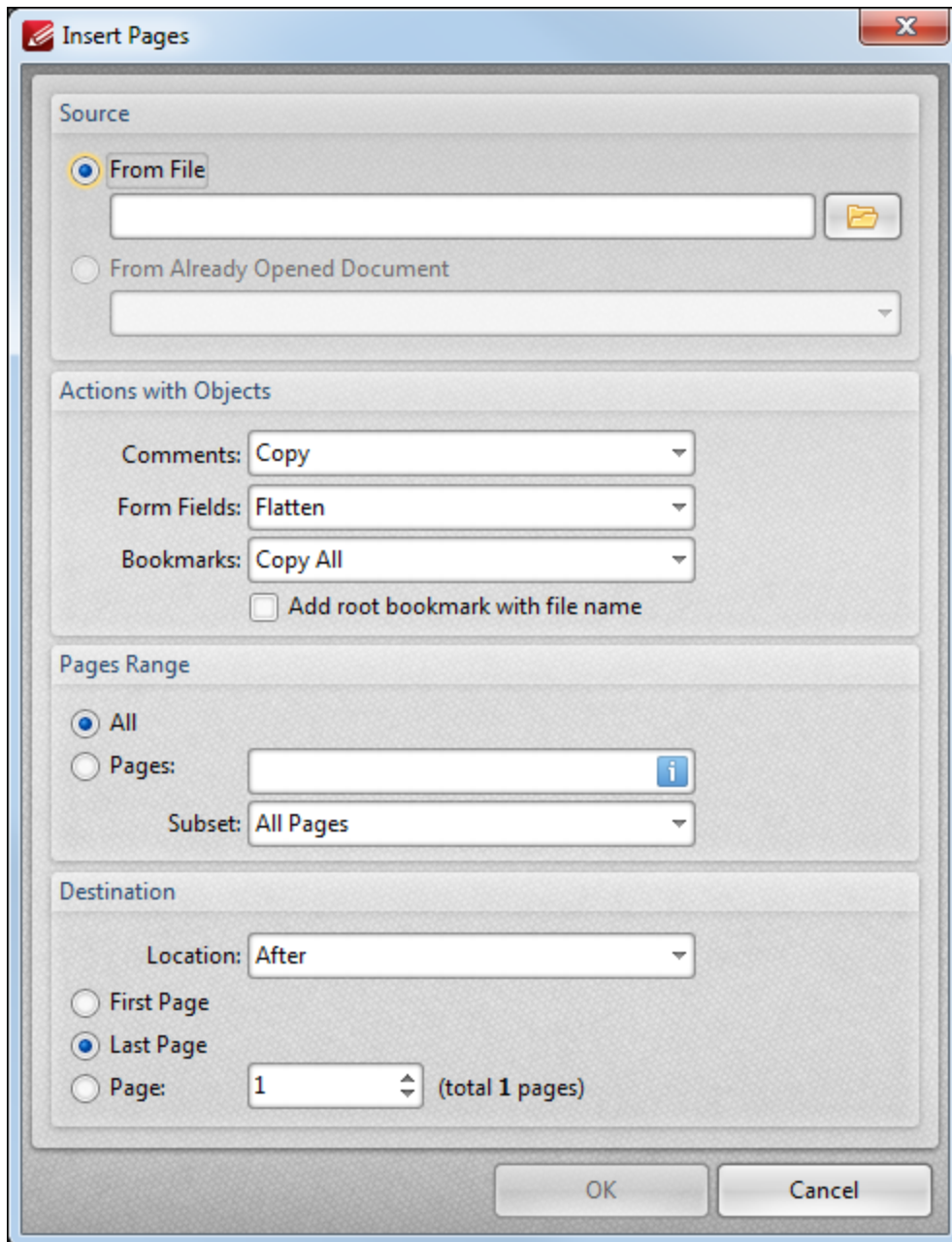
Figure 1. Insert Pages Dialog Box

- There are two options in the **Source** section. Select either **From File** or **From Already Opened Document** to determine the location from which the inserted pages will come.
- Use the menus in the **Actions with Objects** section to determine actions taken with **Comments, Form Fields** and **Bookmarks.** Select the **Add root bookmark with file name** box as desired.
- Use the **Pages Range** section to determine which pages are inserted. Select **All** to insert all pages. Alternatively, use the **Pages** number box to enter individual pages, separated with a comma, or page ranges, separated with a hyphen. The **Subset** menu can be used to select either all even or all odd pages of the document.

- Use the **Destination** section to determine the location in the active document where the new pages will be inserted.
- When the desired settings have been selected, click **OK** to insert pages.
- Click **Cancel** to cancel the process and close the dialog box.

Insert Empty Pages

This option can be used to insert empty pages into the active document. When it is selected, the following dialog box will open:
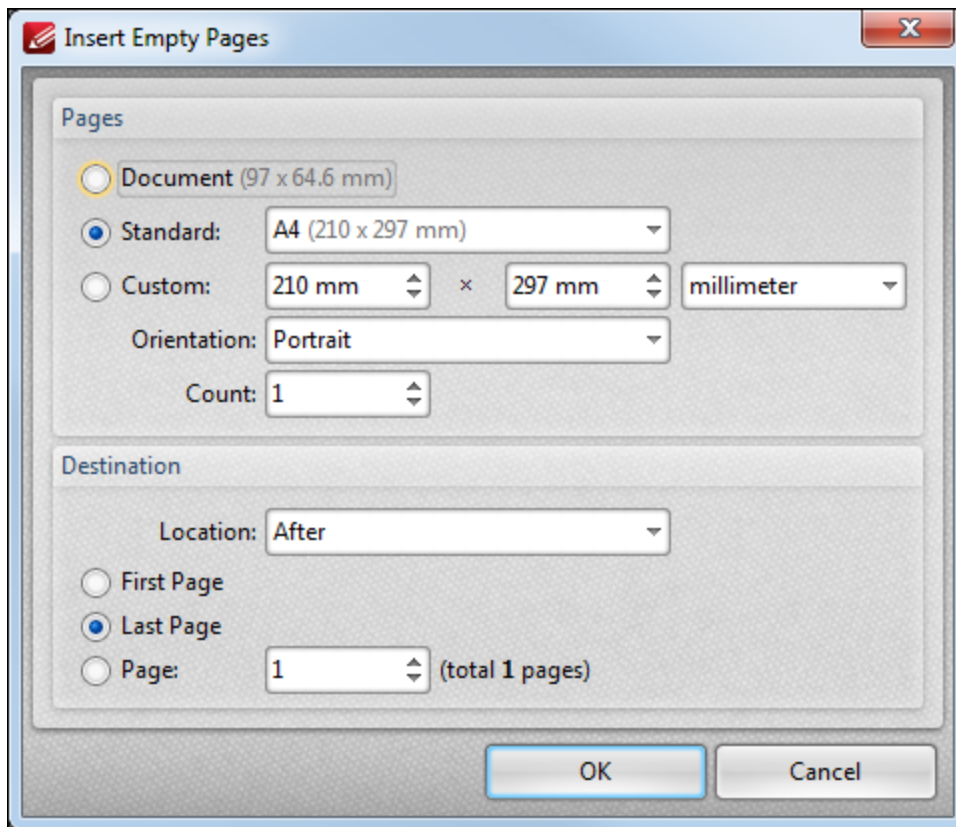
Figure 2. Insert Empty Pages Dialog Box

- Use the settings in the **Pages** section to determine the dimensions of the empty pages:
  - Select **Document** to match the dimensions of the active document into which empty pages are being inserted.
  - Select **Standard** to select one of the standard document sizes, such as those used by the **ISO** and **ANSI.**
  - Select **Custom** to enter custom dimensions and enter the desired dimensions into the number boxes.
  - Use the measurements menu to select the units of measurement.
  - Select either **Portrait** or **Landscape** from the **Orientation** menu.
  - Use the **Count** menu to determine how many pages are inserted.

- Use the settings in the **Destination** section to determine the location at which the empty pages are inserted into the active document.
- When the desired settings have been selected, click **OK** to insert the empty pages.

Insert Images

This option can be used to insert images into the active document. When it is selected, the following dialog box will open:
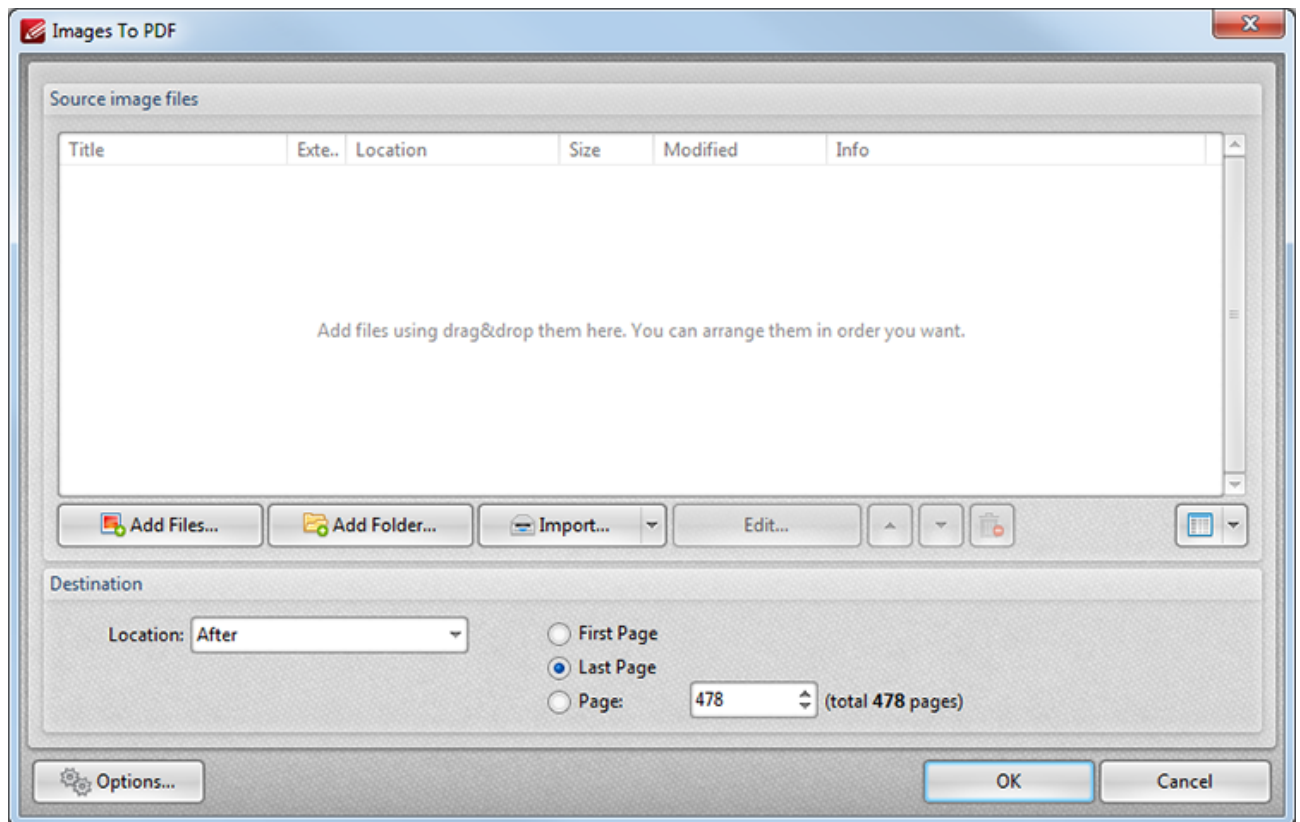
Figure 3. Images to PDF Dialog Box

- Click **Add Files** to add images from the local computer to the list of source files.
- Click **Add Folder** to add all images from a specific folder to the list of source files.
- Click **Import** to import images directly from the local scanner. See here 230 for further details.
- When images have been added to the list of source files, click **Edit** to edit them before they are inserted.
- Use the settings in the **Destination** section to determine the location at which the images are inserted.
- Click **Options** to determine the options for inserted images. See here 222 for further details.
- When the desired settings have been selected, click **OK** to insert the empty pages.

Insert Scanned Pages

This option can be used to insert scanned images into the active document. When it is selected, the following dialog box will open:
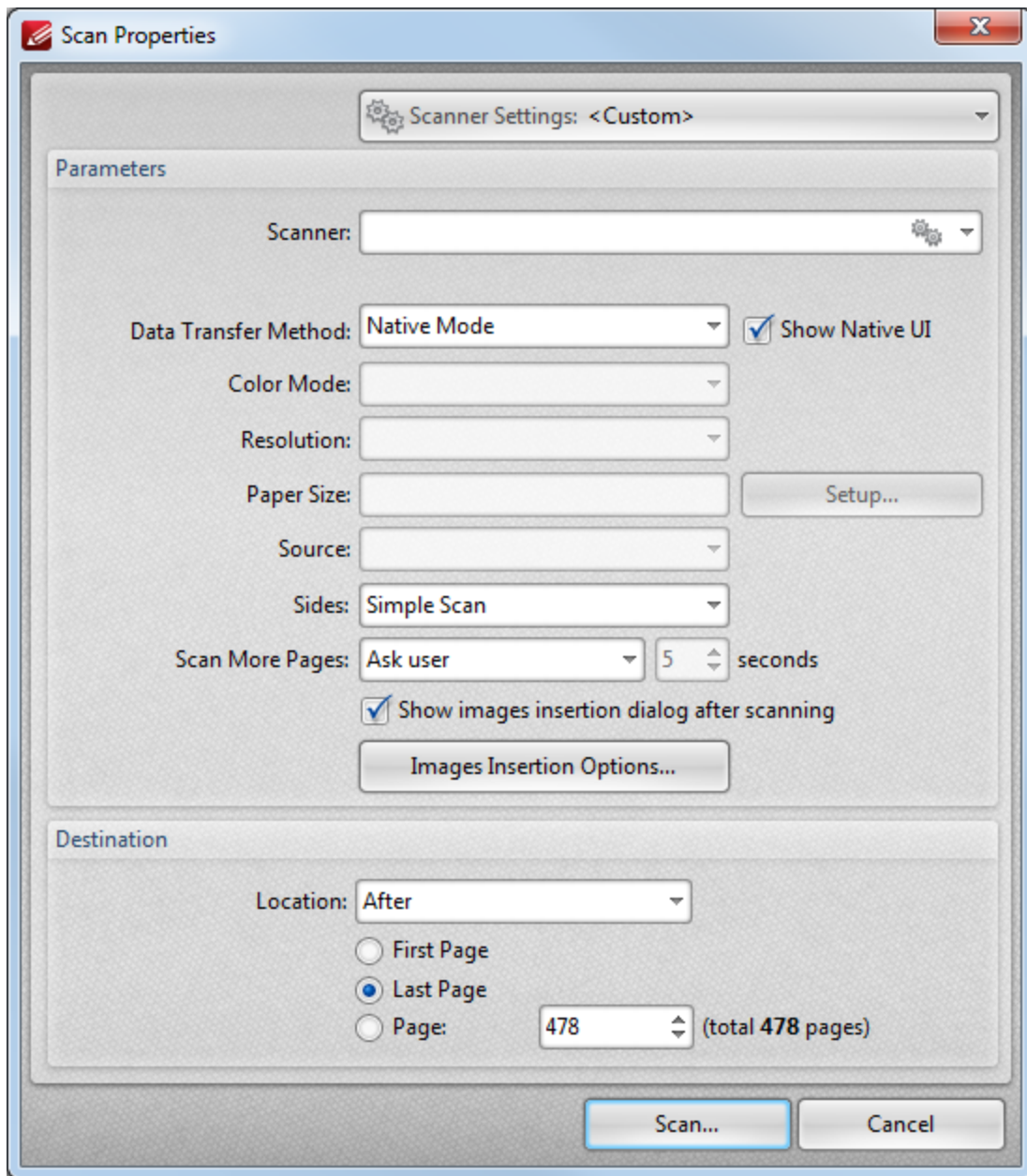
Figure 4. Scan Properties Dialog Box

- Click the **Scanner Settings** menu to select a predefined scanning mode or enter custom dimensions.
- Click the **Scanner** menu to select the scanner to be used.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode.**
- **Color Mode** has three options: **Color, Grayscale** and **Black & White**. These refer to the format of the scanned documents.
- Click the **Resolution** menu to select the **dpi** (dots per inch) of scanned documents.

- **Paper Size** refers to the size of the paper used when scanning. Click **Setup** for further options:
  - The **Automatic** option determines the paper size automatically.
  - The **Standard** option contains standard sizes such as those used by the **ISO** and **ANSI**.
  - The **Custom** option can be used to enter custom dimensions.
  - Select either **Portrait** or **Landscape** as the orientation of the document.
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner being used.
- Click the **Sides** menu to select which sides of documents are scanned. There are three options: **Simple Scan, Manual Duplex** and **Manual Duplex Reversed.** Click the arrow for an explanation of these options.
- Click the **Scan More Pages** menu to select the setting for when further pages are scanned.
- The **Show images insertion dialog after scanning** box is selected by default. This means the dialog box that determines the image insertion will appear after the scan. Clear the box to skip this step of the process.
- The **Show Native UI** box is selected by default. This means the scanner selects certain parameters of the scan automatically: **Color Mode, Resolution, Paper Size** and **Source.** Clear the box to customize these parameters manually.
- Use the **Destination** options to determine where in the active document the scanned pages will be be inserted.

When the desired details have been entered, click **Scan** to scan the image. Click **Cancel** to cancel the process and close the dialog box.

When custom parameters have been entered in the **Scan Properties** dialog box they can be saved for subsequent use with the **Save Current Settings** option. Click the icon/text to save the current settings. Enter a name (and brief description, if desired) for the customized settings. Click **Manage** to edit customized settings and **Delete** to remove the settings currently in use.

Insert Text

This option can be used to insert text into the active document. When it is selected, the following dialog box will open:

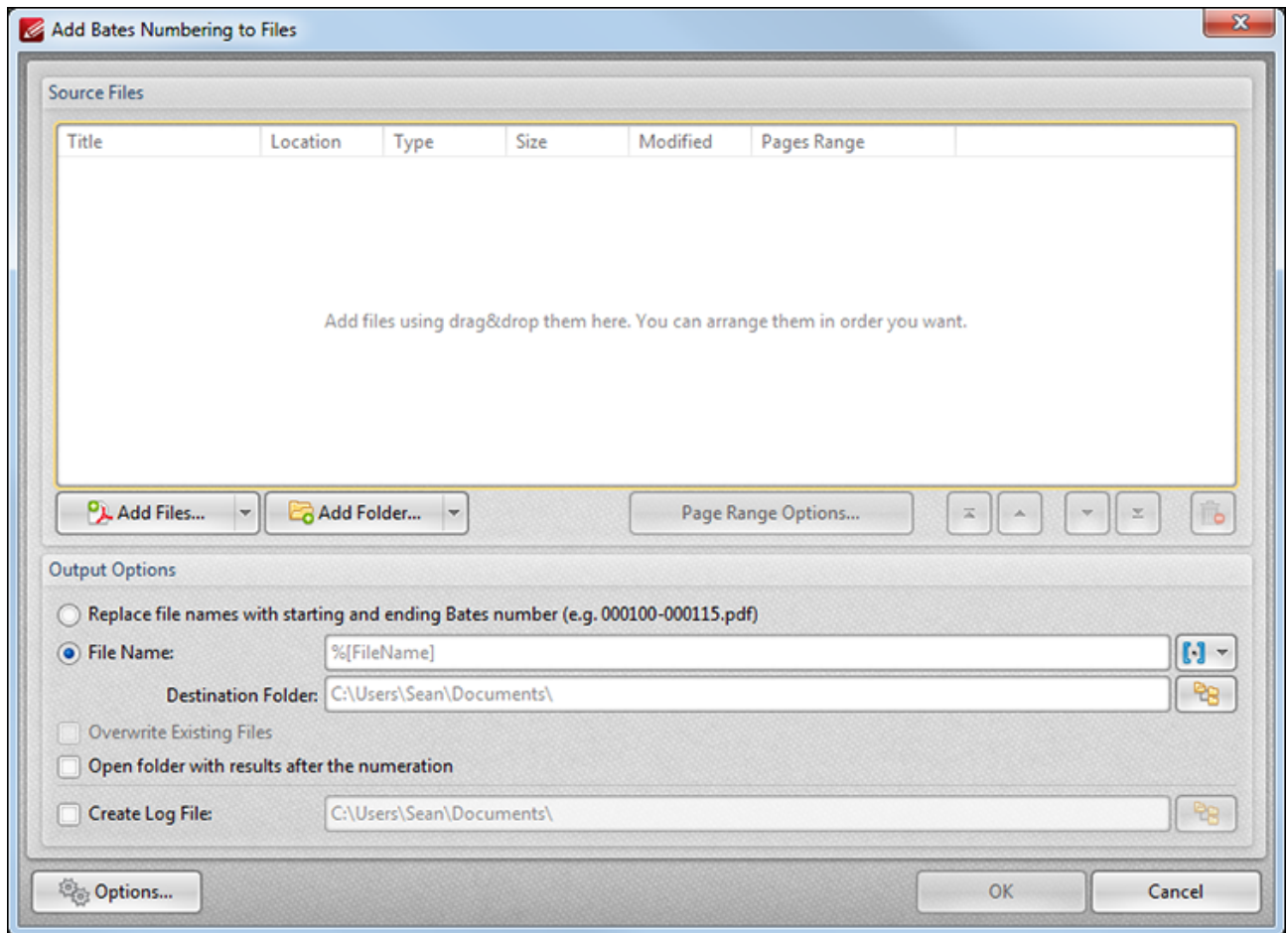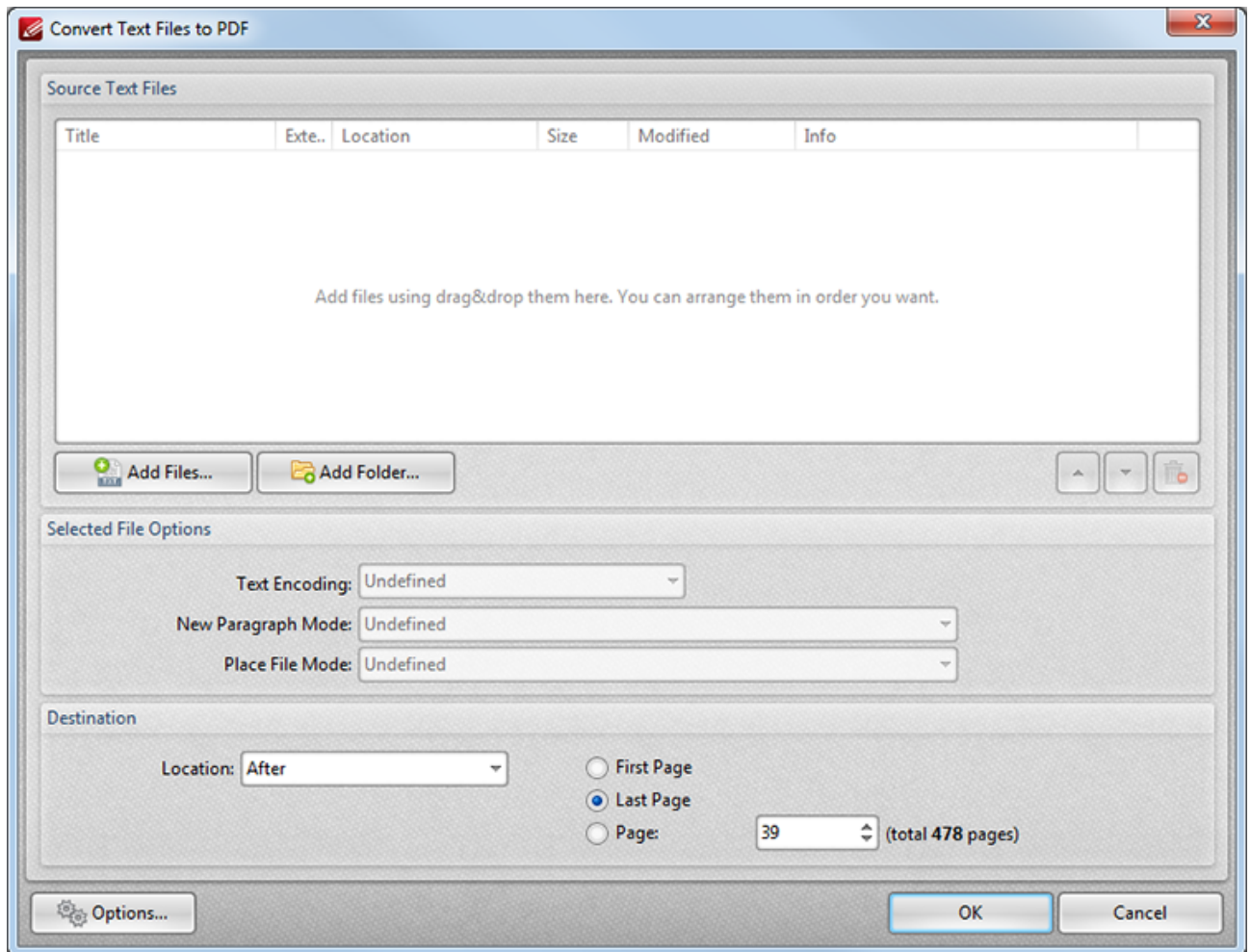**Figure 5.** Convert Text Files to PDF Dialog Box

- Click **Add Files** to add text files from the local computer to the list of source files.
- Click **Add Folder** to add all text files from a specific folder to the list of source files.
- Select a file from the list of source files to enable the **Selected File Options:**
  - **Text Encoding** determines the language of the text in the file.
  - **New Paragraph Mode** determines the manner in which **PDF-XChange Editor** defines paragraphs in the inserted text. The options are as follows:
  - **Each newline character starts a new paragraph.** (A newline is a special character in computing that signifies the end of a line of text).
  - **Two newline character starts a new paragraph, singles ignored.**
  - **Double newline character starts a new paragraph, singles is converted into space.**
- Use the settings in the **Destination** section to determine the location at which the text files are inserted into the active document.
- Click **Options** to determine the options for inserted text tiles. See here 215 for further information.
- When the desired settings have been selected, click **OK** to insert the text files.

Insert RTF

This option can be used to insert RTF files into the active document. When it is selected, the following dialog box will open:
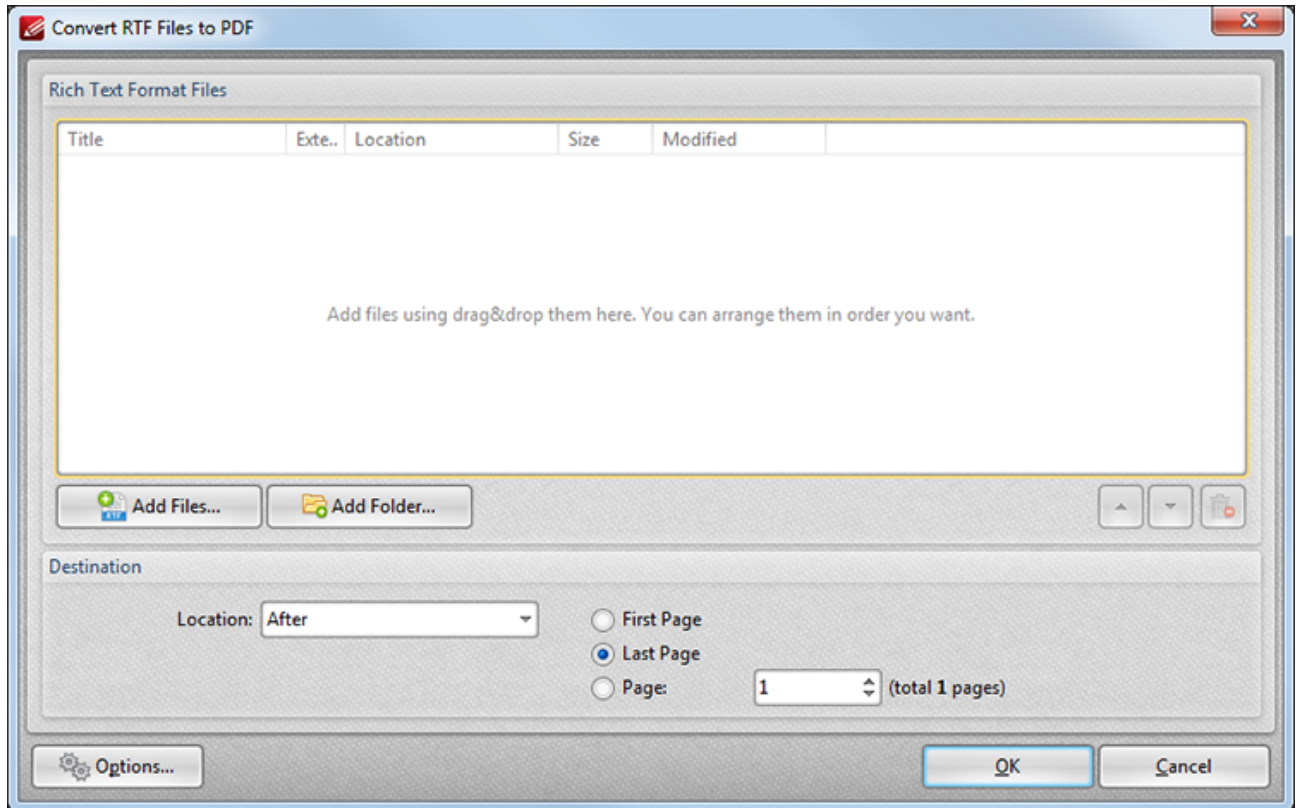
Figure 6. Convert RTF Files to PDF Dialog Box

- Click **Add Files** to add RTF files from the local computer to the list of source files.
- Click **Add Folder** to add all RTF files from a specific folder to the list of source files.
- Use the settings in the **Destination** section to determine the location at which files are inserted into the active document.
- Click **Options** to determine the relative path options for inserted files.
- When the desired settings have been selected, click **OK** to insert the RTF files.

Extract Pages

Extract Pages

This option can be used to extract pages from the active document. When it is selected the following dialog box will open:
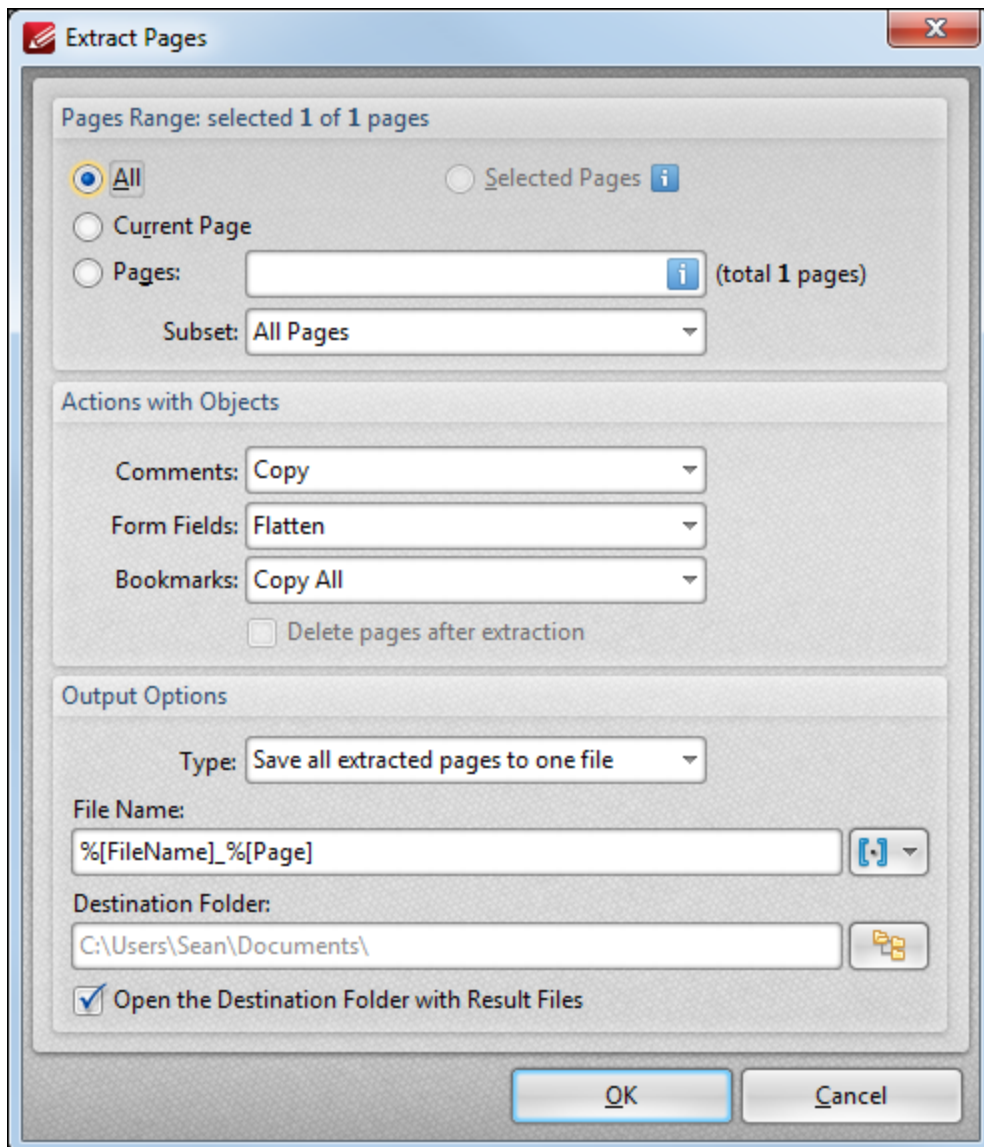
Figure 1. Extract Pages Dialog Box

- Use the **Pages Range** options to determine the pages to be extracted from the active document.
- Use the **Pages** option button to select individual pages, which must be separated with a comma, or page ranges, which must be separated with a hyphen.
- Use the **Subset** menu to select a subset of pages.
- Use the **Actions with Objects** options to determine the settings for objects within the extracted pages.
- Select the **Delete pages after extraction** box as desired.
- Use the **Output Options** to determine the manner in which extracted pages are saved.
- Use the **Type** menu to determine the grouping of extracted pages when they are saved.
- Use the **File Name** text box to enter a file name for extracted pages. Click the icon to include [macros] 579.
- Use the **Destination Folder** text box to enter the name of the desired destination folder, or click the icon to select a file from the local computer.
- Select the **Open the Destination Folder with Result Files** box to open the destination folder when the operation is complete.
- When the desired settings have been entered, click **OK** to extract the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Split Document

Split Document

This option can be used to divide the active document. There are two methods through which this can be achieved. Documents can be split according to their top-level bookmarks or their page numbers. It is a useful feature for documents that are divided into chapters such as books. When it is selected, the following dialog box will open:
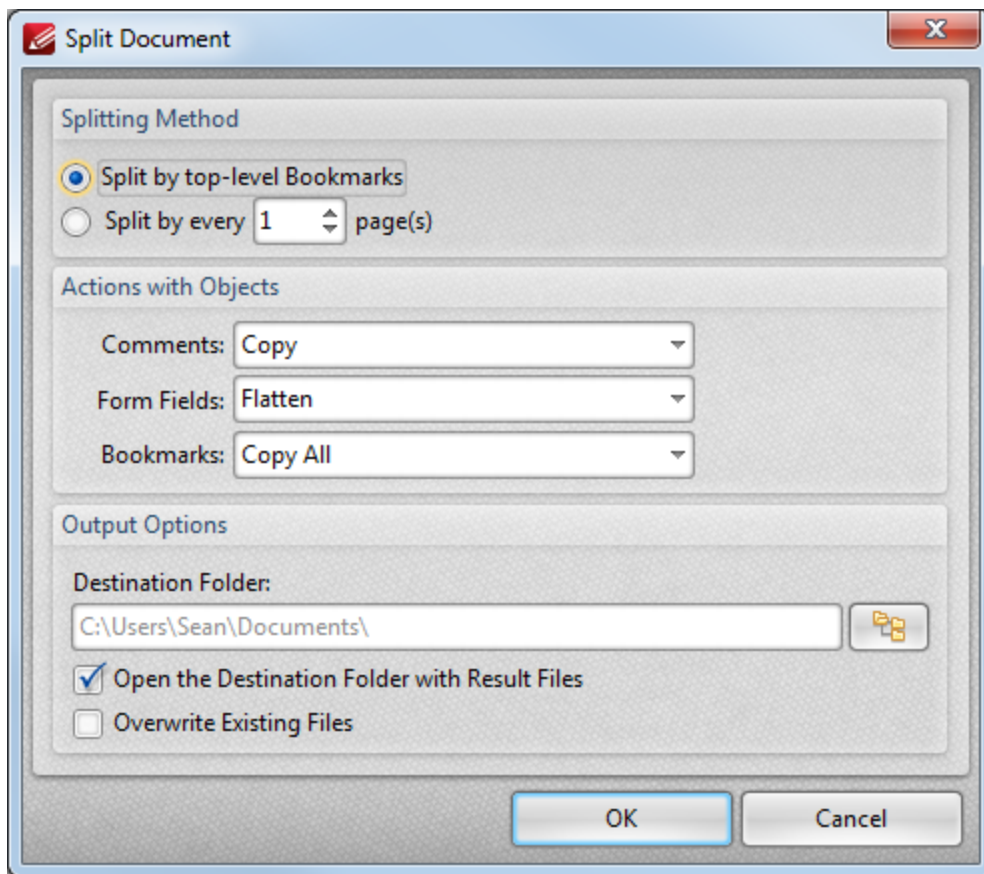
Figure 1. Split Document By Bookmarks Dialog Box

- Use the **Splitting Method** options to determine the manner in which the document is split:
  - Select **Split by top-level Bookmarks** to split the document according to its top-level bookmarks.
  - Select **Split by every _n_ page(s)** to split the document every _n_ pages.

- Use the **Actions with Objects** options to determine the settings for objects in the new document.
- Use the **Output Options** to determine the manner in which extracted pages are saved:
  - Use the **Destination Folder** to enter the name of the desired destination folder, or click the icon to select a file from the local computer.
  - Select the **Open the Destination Folder with Result Files** to open the destination folder when the process is complete.
  - Select the **Overwrite Existing Files** box as desired. This means that files saved in folders that feature files of the same name will overwrite the existing files. It is a useful feature when documents need to be split multiple times.
- When the desired settings have been entered, click **OK** to split the document.
- Click **Cancel** to cancel the process and close the dialog box.

Replace Pages

Replace Pages

This option can be used to replace pages of the active document with pages from another document. When it is selected, the following dialog box will open:
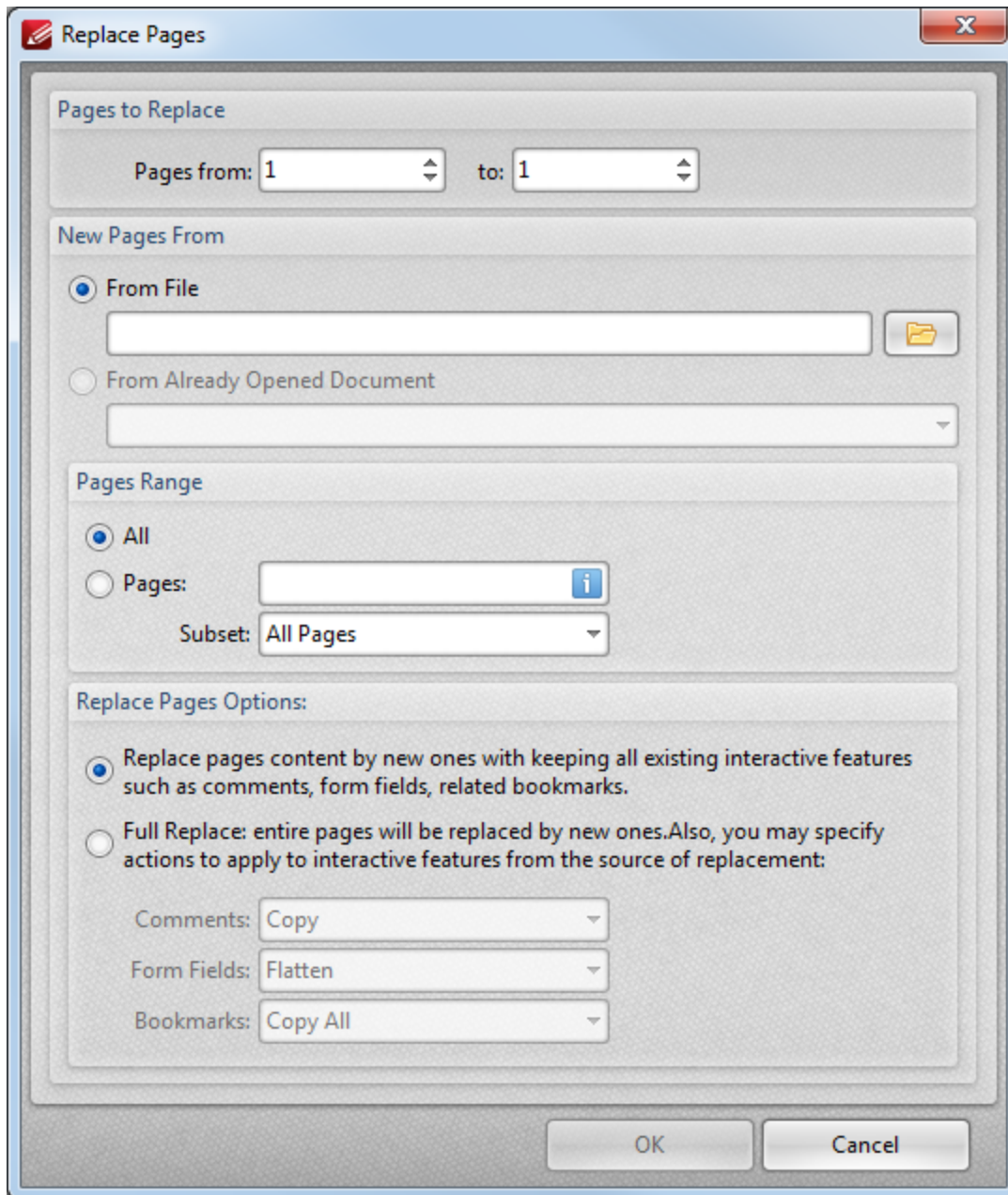
Figure 1. Replace Pages Dialog Box

- Use the number boxes in the **Pages to Replace** section to determine the pages that will be replaced.
- Use either of the options in the **New Pages From** section to determine the location from which the new pages will be sourced.
- Use the **Pages Range** section to determine the pages of the selected document that will replace the pages selected in the **Pages to Replace** section. Use the **Pages** text box to select individual pages, separated with a comma, or page ranges, separated with a hyphen.
- Use the **Replace Pages Options** to determine the parameters of the new pages.
- When the desired settings have been entered, click **OK** to replace the selected pages.

- Click **Cancel** to cancel the process and close the dialog box.

Delete Pages

Delete Pages

This option can be used to delete pages within the active document. There are two available options:

Delete Pages

This option can be used to delete specific pages within the active document. When it is selected the following dialog box will open:
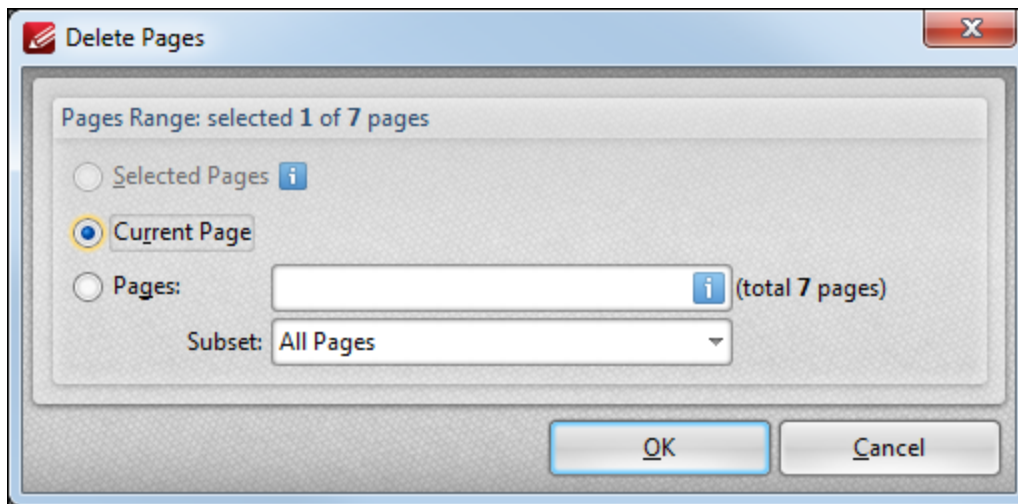
Figure 1. Delete Pages Dialog Box

- Use **Selected Pages** to delete the pages currently selected in thumbnails view.
- Use **Current Page** to delete the current page of the active document.
- Use the **Pages** number box to select specific pages or page ranges. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- Use the **Subset** menu to select a subset of pages.
- When the desired settings have been entered, click **OK** to delete the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Delete Empty Pages

This option is intended for use when deleting empty pages from active document. When it is selected the following dialog box will open:
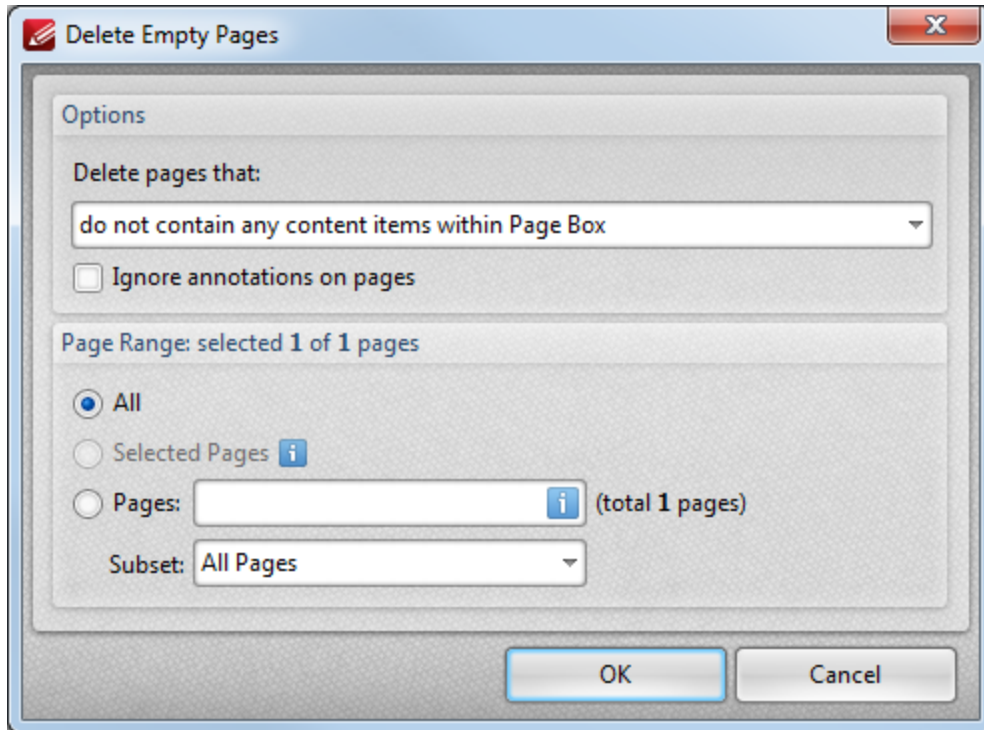
Figure 2. Delete Empty Pages Dialog Box

- Use the **Delete pages that** menu to determine the type of pages that will be deleted.
- Select the **Ignore annotations on pages** dialog box as desired.
- The options in the **Pages Range** section determine which pages will be included when **PDF-XChange Editor** scans the document for empty pages. The options are as follows:
    - Select **All** to include all pages of the active document.
    - Select **Selected Pages** to include only the pages currently selected in the **Thumbnails** ⌐400⌐ pane.
    - Use the **Pages** box to determine specific pages. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
    - When the desired parameters have been selected, click **OK** to perform the operation. Click **Cancel** to cancel the process and close the dialog box.

Crop Pages

Crop Pages

This option can be used to crop pages within the active document. When it is selected the following dialog box will open:
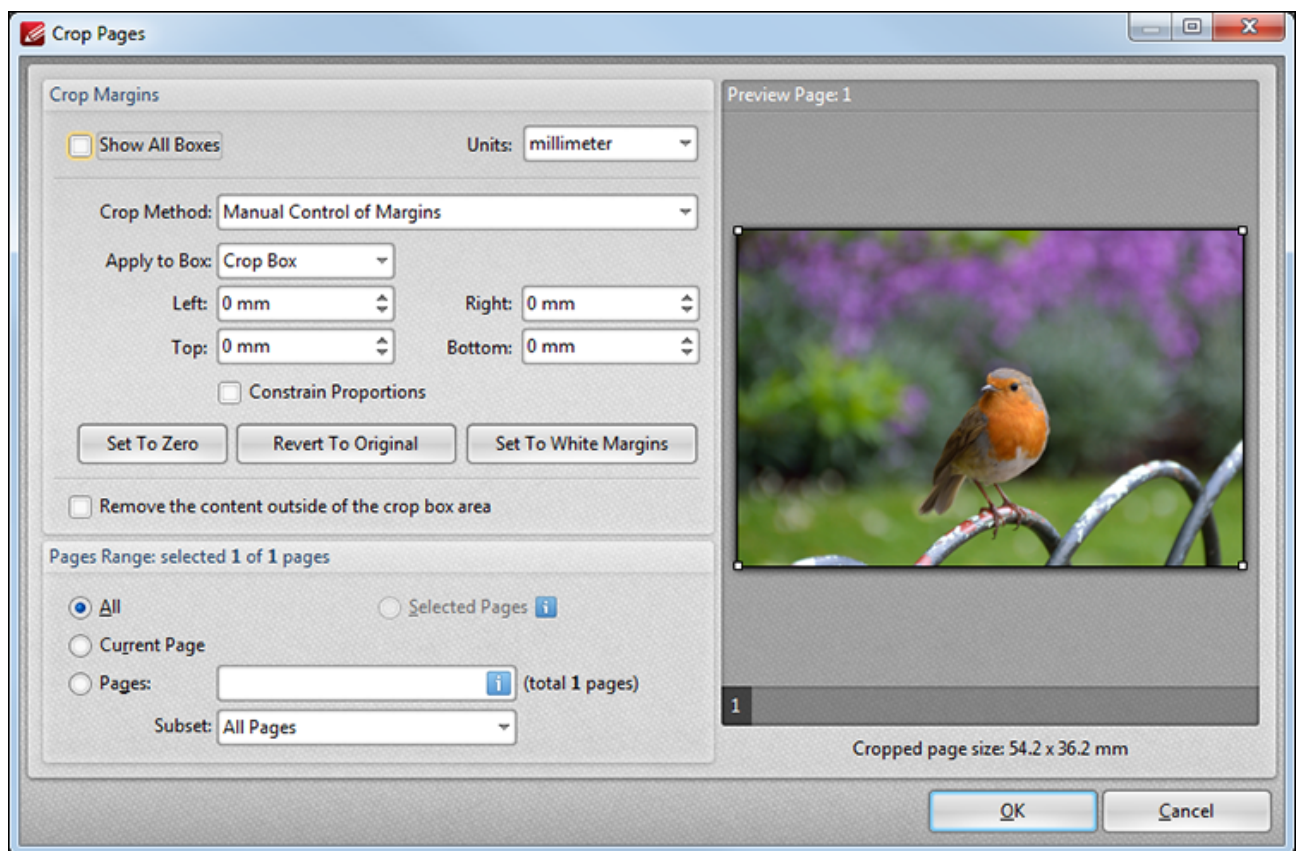
Figure 1. Crop Pages Dialog Box

PDF documents feature up to five boxes that determine their content and appearance. They are the Media Box, Crop Box, Bleed Box, Trim Box and Art Box. **PDF-XChange Editor** uses four of these boxes to determine customizable settings. See here[574] for further information.

- Use the **Crop Margins** settings to determine the cropping parameters.
- Select the **Show All Boxes** box to view all four boxes in the preview pane.

- Use the **Crop Method** menu to select the cropping method. There are four options. Three of these: **Remove All White Spaces, Remove Vertical White Spaces** and **Remove Horizontal White Spaces** have predefined and self-explanatory settings that cannot be changed. The fourth option, **Manual Control of Margins**, allows the user to define boxes and margins.
- Use the **Apply to Box** menu to select and edit box margins.
- Enter the desired measurements for the **Left, Right, Top** and **Bottom** margins of the selected box.
- Select the **Constrain Proportions** box to maintain the ratio of margins. For example if the margin in the **Left** box is changed to 5mm then the margins in the **Right, Top** and **Bottom** boxes will also be changed to 5mm.
- Use **Set to Zero, Revert to Original** and **Set To White Margins** to apply these functions to boxes selected in the **Apply to Box** menu.
- Select the **Remove the content outside of the crop box area** box to remove content outside the crop box. Any information cropped away by the crop box will not be removed from the file's underlying code unless this option is selected.
- The **Pages Range** settings are as follows:.
  - Select **All** to crop all the pages of the document.
  - Select **Current Page** to crop only the current page.
  - Use the **Pages** box to determine specific pages of the document to be cropped. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been entered, click **OK** to crop the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Crop Page Tool

Crop Page Tool

This tool can be used to crop the active document. When it is selected the user will be prompted to **Drag Crop Rectangle** on the active document. The pointer will turn into a crosshairs, using which the user can select the area of the document to crop. When the desired area has been selected the dialog box detailed in the **Crop Pages** 449 section will launch. Configure the parameters and then click **OK** to crop the document.

Resize Pages

Resize Pages

This option can be used to resize the pages of the active document. When it is selected, the following dialog box will be displayed:
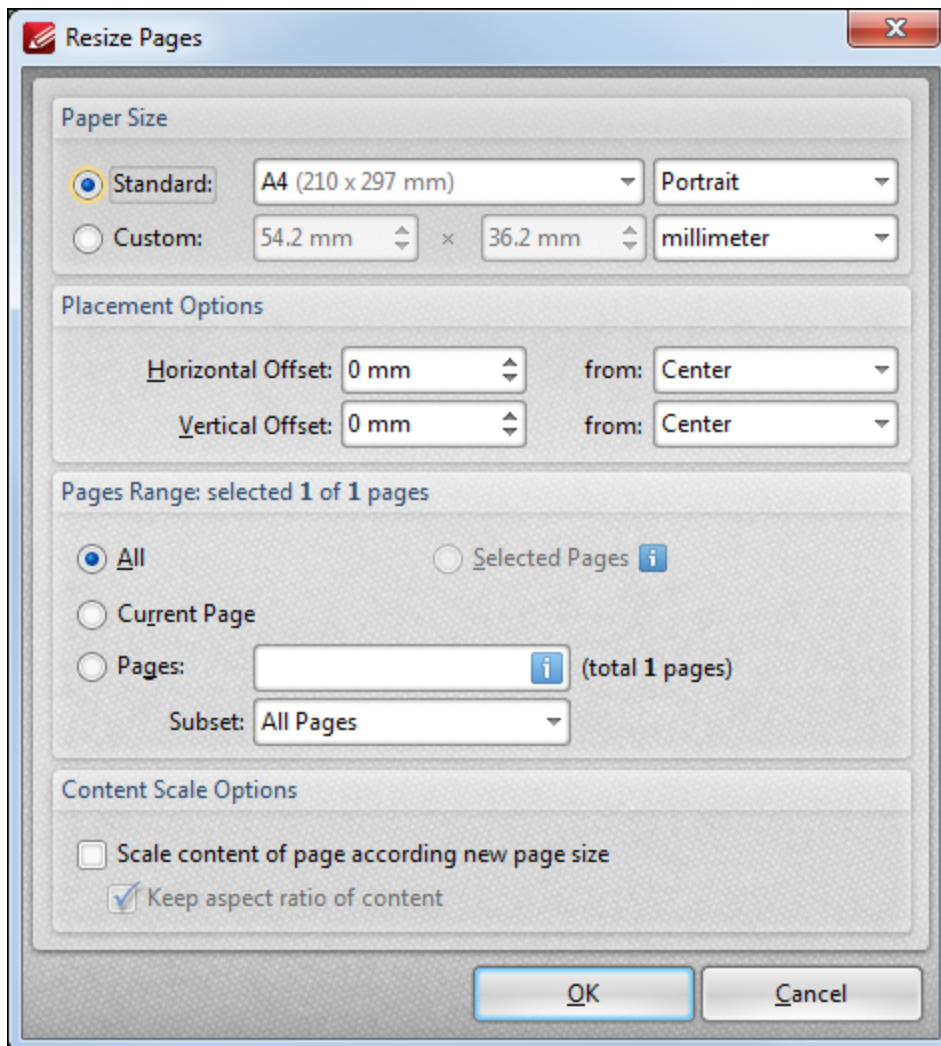
Figure 1. Resize Pages Dialog Box

- The **Paper Size** options determine the size and layout of new pages. Click the **Standard** option button to select standard sizes such as those used by the **ISO** and **ANSI**. Use the menu in the adjacent box to select either **Landscape** or **Portrait** as the page orientation. Alternatively, click the **Custom** option button to enter custom dimensions.
- The **Placement** options determine the horizontal/vertical offset of resized pages and the location from which the offset is made.
- The **Pages Range** settings are as follows:.
    - Select **All** to resize all the pages of the document.
    - Select **Current Page** to resize only the current page.
    - Use the **Pages** box to determine specific pages of the document to be resized. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Content Scale** options determine the scale of the page content in relation to the new page size. Select the **Scale content of page according new page size** box to scale the content of original page to the new page size. This is carried out as far as the aspect ratio will allow. Clear the **Keep aspect ratio of content** box to scale all content of the original page to the new page size.
- When the desired settings have been entered, click **OK** to resize the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Rotate Pages

Rotate Pages

This option can be used to rotate the pages of the active document. When it is selected, the following dialog box will be displayed:
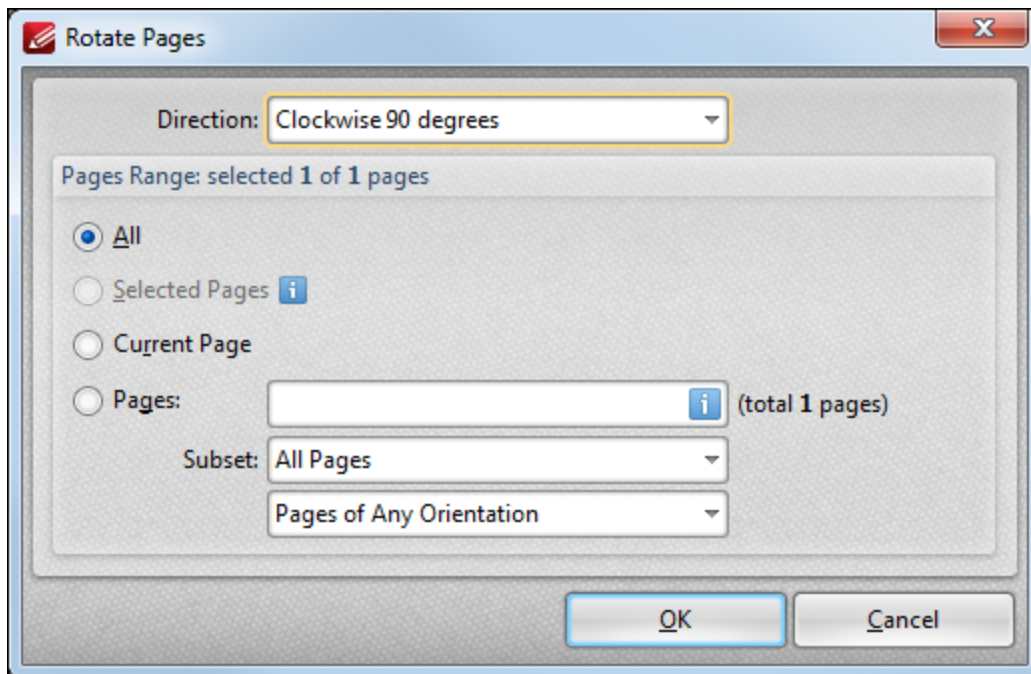
Figure 1. Rotate Pages Options

- Use the **Direction** menu to determine the direction and degree of rotation.
- The **Pages Range** options are as follows:
    - Select **All** to rotate all the pages of the document.
    - Select **Selected Pages** to rotate the pages currently selected in thumbnails view.
    - Select **Current Page** to rotate only the current page.
    - Use the **Pages** box to determine specific pages of the document to be resized. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been entered, click **OK** to rotate the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Split Pages

 Split Pages

This option can be used to split the pages of the active document. When it is selected, the following dialog box will be displayed:
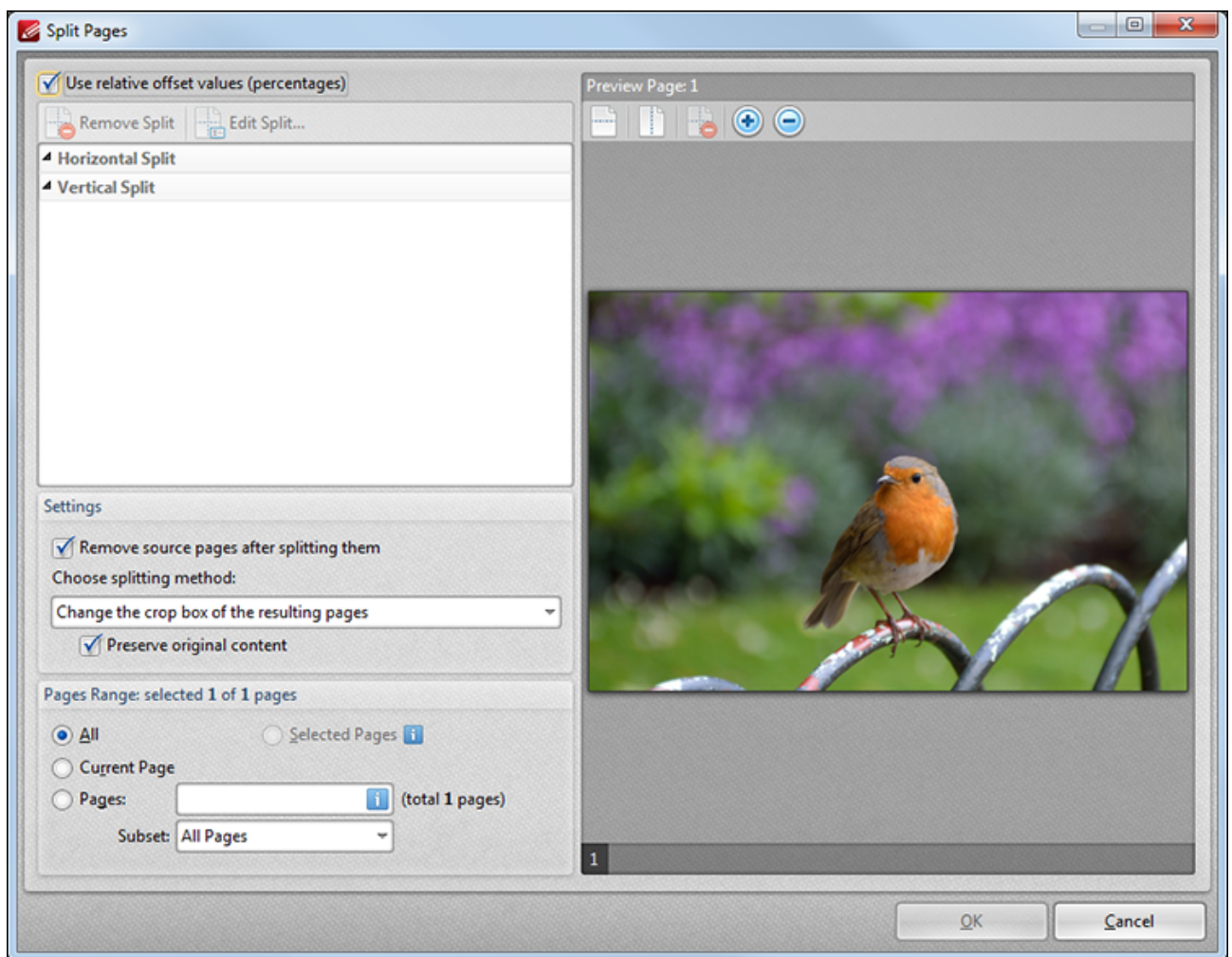
Figure 1. Split Pages Dialog Box

- Select the **Use relative offset values (percentages)** box as desired. This means that the dimensions of the split will be shown in percentages instead of standard units of measurement.

- Click the white page icons at the to of the preview pane to perform either a vertical or horizontal split. A corresponding line will appear in the preview pane. Depending on the type of split performed, either the horizontal split or vertical split tab will update in the pane on the left.
- Splits can be edited or removed using the icons at the top of the pane:
    - Click **Remove Split** to remove the split from the list.
    - Click **Edit Split** to edit the dimensions of the split. Enter a new value for the percentage/unit of measurement. The split will update accordingly in the preview pane.
- Use the zoom icons at the top of the of preview pane as desired.
- Select the **Remove source pages after splitting them** to remove the original document from the active pane when pages are split. If this box is cleared then both the original document and the split pages will be present after pages are split.
- Use the **Choose splitting method** menu to determine the manner in which pages are split:
- **Change the crop box of resulting pages** creates new crop boxes for split pages and means that all underlying data from the original page exists on each of the split pages. See [here]574 for further information about crop boxes.
    - **Change the physical size of the resulting pages** splits the the pages and removes any data outside the split areas.
- The **Preserve original content** box is available only when using the **Change the crop box of resulting pages** option. When selected, this option preserves the page's original content.
- The **Pages Range** settings are as follows:
    - Select **All** to split all the pages of the document.
    - Select **Current Page** to split only the current page.
    - Use the **Pages** box to determine specific pages of the document to be split. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been entered, click **OK** to split the selected pages.
- Click **Cancel** to cancel the process and close the dialog box.

Number Pages

Number Pages

This option can be used to number the pages of the active document. It is useful if users want documents to feature more than one page range. When it is selected, the following dialog box will be displayed:
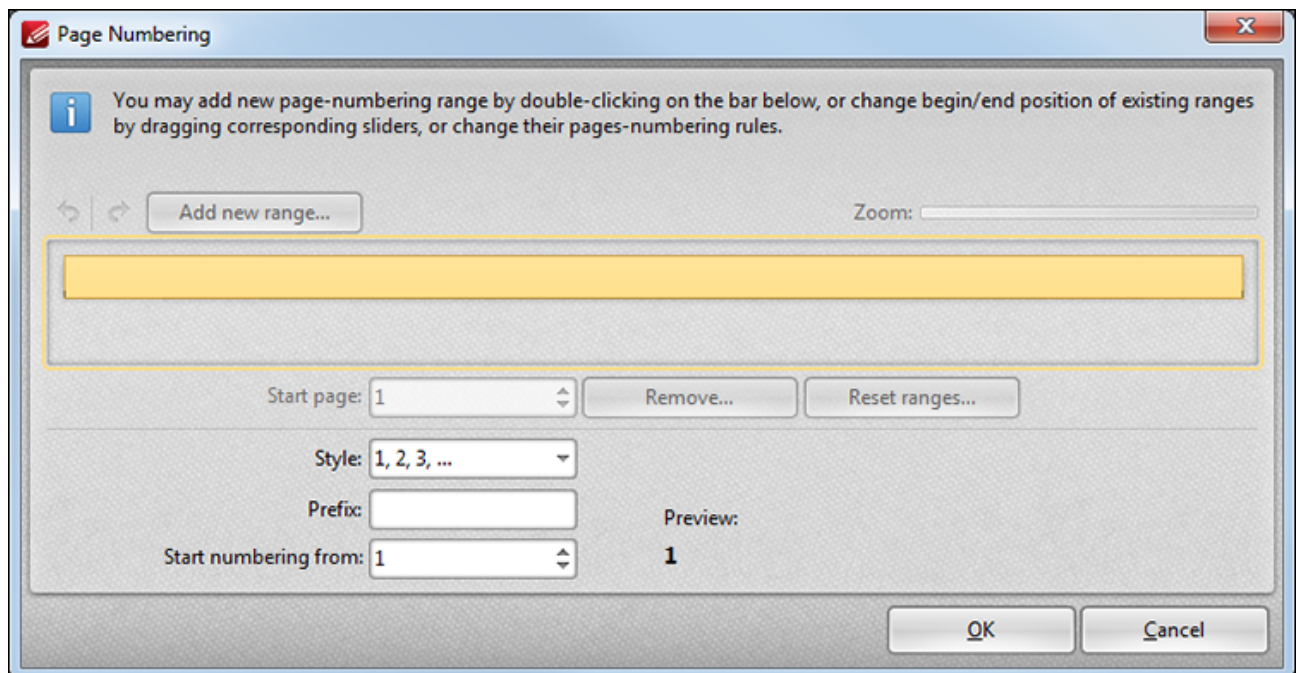
Figure 1. Page Numbering Dialog Box

- Click the **Add new range** button to add a new page range to the active document. The **Add new range** dialog box will open. Enter the number of the page at which the range is to begin into the number box. (Please note that the default range of all documents starts at 1. Therefore subsequent page ranges must feature a different starting value). Click **OK** to continue the process. Click **Cancel** to cancel the process and close the dialog box.
- Click **Remove** to remove the selected page range.
- Click **Reset ranges** to reset the selected range.
- Use the **Style** menu to determine the numbering style.
- Use the **Prefix** box to add a prefix to page numbers.

- Use the **Start numbering from** box to determine the number from which the numbering begins.
- Use the arrow icons on the left of the **Add New Range** button to redo/undo operations.

When the desired settings have been entered, click **OK** to apply them. Click **Cancel** to cancel the process and close the dialog box.

OCR Pages

OCR Pages

This option can be used to OCR the pages of the active document. OCR is an abbreviation of Optical Character Recognition. This process is used to convert type, handwritten or printed text into machine-encoded text. See here for more information. When this option is selected, the following dialog box will be displayed:
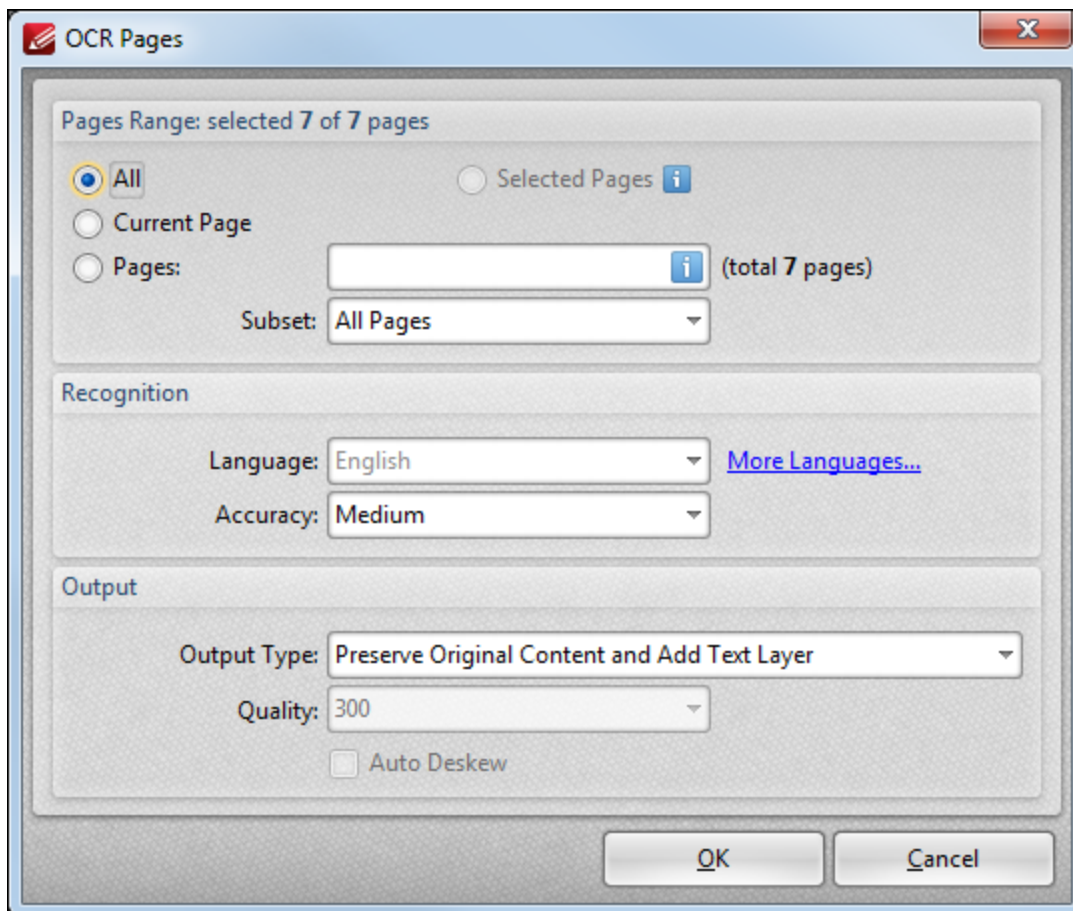
Figure 1. OCR Pages Dialog Box

- The **Pages Range** options are as follows:
  - Select **All** to OCR all the pages of the document.
  - Select **Current Page** to OCR only the current page.

- Use the **Pages** box to determine specific pages of the document on which to perform the OCR process. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Recognition** options determine the language and accuracy of the OCR process. Increasing the accuracy increases the time that the process takes and vice versa.
- The **Output** options determine the format of the output information from the OCR process:
  - Select either **Create New Searchable PDF** or **Preserve Original Content and Text Layer**.
  - The **Quality** setting determines the resolution of the new PDF document in dpi (dots per inch).
  - Select the **Auto Deskew** option to deskew documents automatically. (Deskewing is a useful feature that straightens images that have been photographed or scanned crookedly).

When the desired settings have been selected, click **OK** to OCR the active document. Click **Cancel** to cancel the process and close the dialog box.

Digital Signing

Digital Signing

This option can be used to add digital signatures to documents. Digital signatures are used to demonstrate the authenticity of documents and increase their security. When this option is selected the following menu is displayed:
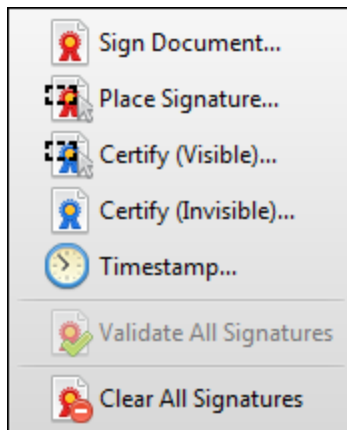
Figure 1. Digital Signing Options

Sign Document

Select **Sign Document** or **Place Signature** to sign the document. A blue rectangle will appear with the cursor. This is the signature field. Place it at the desired location in the document. Then click to launch the following dialog box:
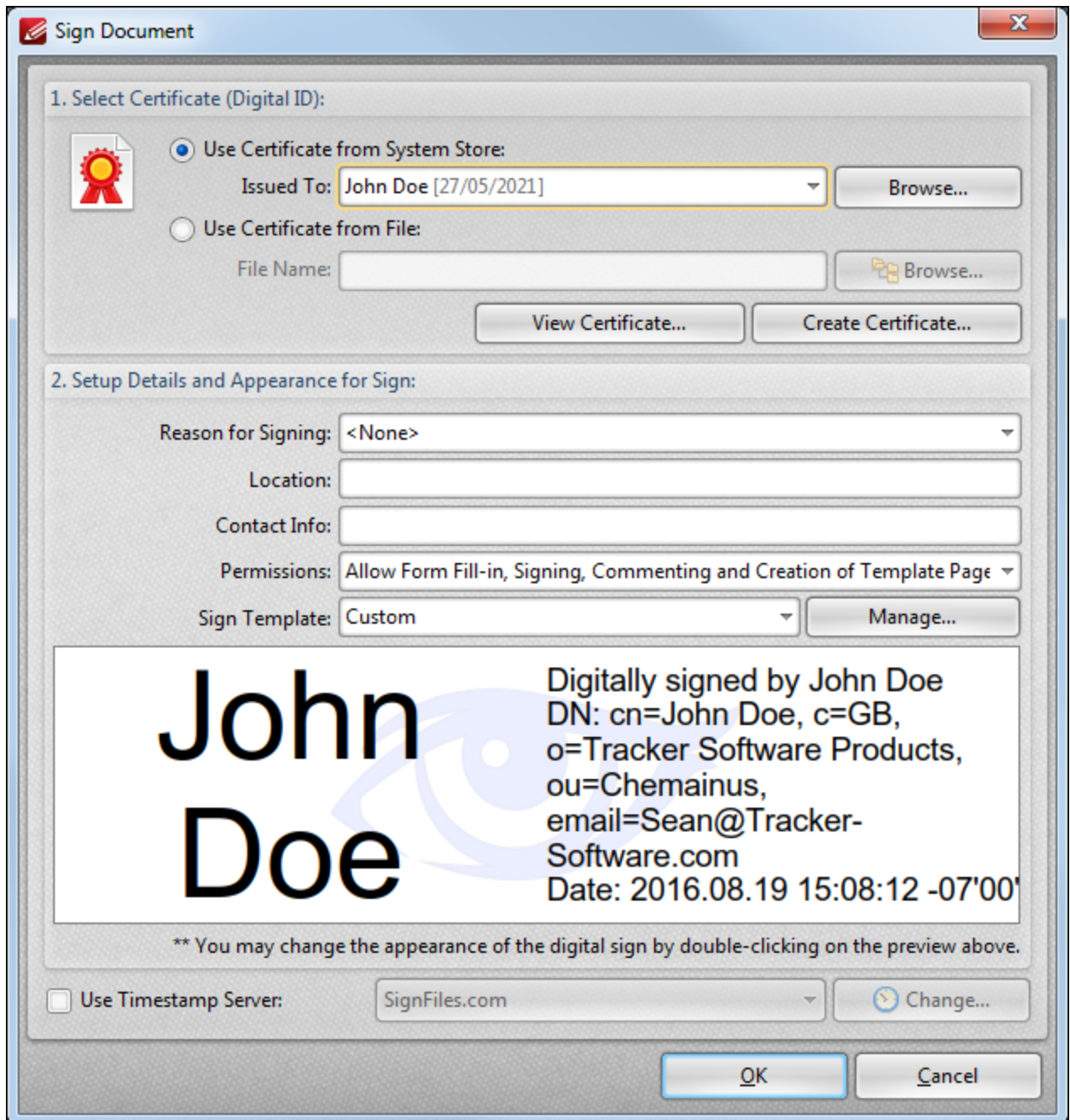
Figure 2. Sign Document Dialog Box

- Select a certificate from either the system store or the files on the local computer.
- Click **View Certificate** to view details about the certificate currently selected.
- Click **Create Certificate** to create a new certificate.
- Click the **Reason for Signing** menu, or enter text into the box manually, to add a reason for signing the document.
- Click the **Location** box to enter a location for where the document is signed.
- Click the **Contact Info** box to add contact information to the signature.
- Click the **Permissions** box to select changes permissible after the document has been signed.

- Click the **Sign Template** menu to select layout options for the signature and associated information.
- Click **Manage** to further customize the **Sign Template.**
- Select the **Use Timestamp Server** box to select a timestamp server to add to the signature.
- Click **Change** to open the **Timestamp Server** dialog box add a new timestamp server.

When the desired details have been entered, click **OK** to sign the document. Click **Cancel** to cancel the process and close the dialog box.

Certify (visible) and **Certify (invisible)**

The **Certify (visible)** option operates in the same manner as the **Sign Document** option detailed above. The **Certify (invisible)** option also operates in the same manner, with the exception that the signature element of the process is excluded. The document will still be digitally signed.

Timestamp Server

Timestamps are used on documents to ensure the long-term preservation of digital signatures, time-seal date objects (to prove when they were received), protect copyrights and intellectual property and provide notarization services. When this option is selected the following dialog box will be displayed:
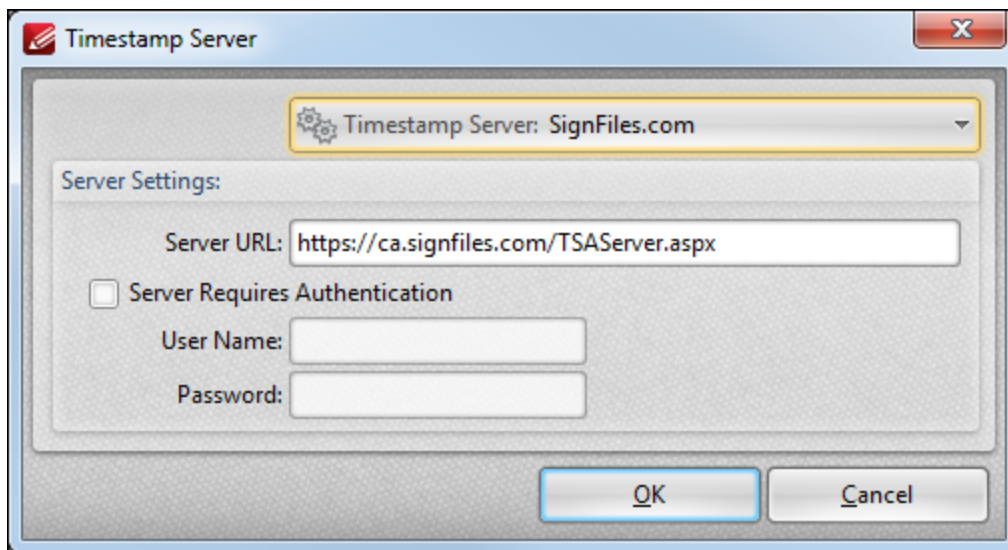
Figure 3. Timestamp Server Dialog Box

- Use the **Timestamp Server** menu to select the timestamp server to be used.
- When using a timestamp server for the first time, enter the website address in the **Server URL** text box.
- If the selected timestamp server requires authentication then select the indicated box and enter the **User Name** and **Password** in the indicated boxes.

When the desired details have been entered, click **OK** to save the changes. Click **Cancel** to revert to previous settings and close the dialog box.

Validate All Signatures

This option is included so that signatures can be validated when the documents that contain them are received. Depending on the default settings of the local computer where the files are received, this process may take place automatically. The authenticity of the signature's digital ID certificate status is checked in order to determine the signature's validity and the overall integrity of the document.

Clear All Signatures

This option is included to clear all digital signatures and certificates, when possible, within the active document. Depending on the settings of the document, this process may require a password.

Please note that when digital signatures have been applied to documents and need to be subsequently verified it is necessary to have the incremental save feature enabled. This feature can be enabled/disabled using the **Documents** settings of the **Preferences** tab, which is available <u>here.</u> 264

Signatures and Initials

Signatures and Initials

This option is included in order to facilitate the addition of a visual picture and/or initials with digital signatures. When it is selected, the following menu is displayed:
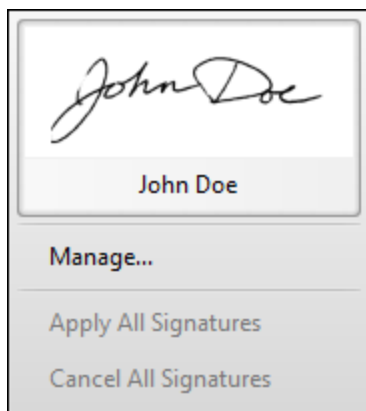
Figure 1. Signatures Menu

- Available signatures are listed at the top of the menu.
- Click **Manage** to manage signatures. The following dialog box will open:
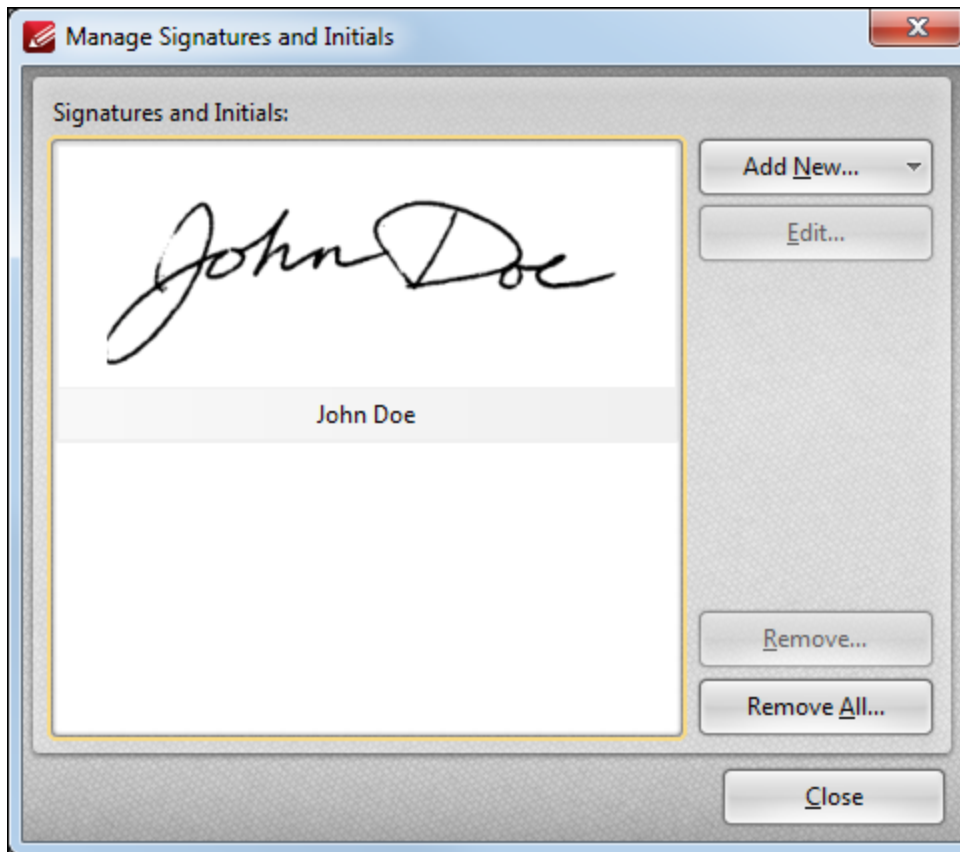
Figure 2. Manage Signatures and Initials Dialog Box

- Click **Add New** to add new signatures to the list of signatures. Either import a signature from file or create one manually using the **Draw Signature** dialog box.
- When signatures are selected, click **Edit** to adjust the signature name and/or password settings.
- Click **Remove/Remove All** to remove signatures from the list.

Redaction

Redaction

The redaction option is included so that information can be completely removed from files. Information removed using this option cannot be recovered. When this setting is selected there are two options:
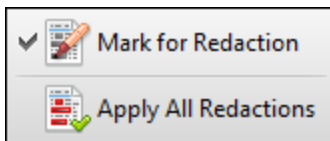
Figure 1. Redaction Options

- **Mark for Redaction** is used to select sections of the active document for redaction. When it is in enabled, click and drag within the active document to determine the areas to be redacted. They will be represented with a red rectangle.
- When all areas for redaction have been determined, click **Apply All Redactions** to carry out the redaction process. The selected areas will be replaced with a black box by default.
- The redaction settings can be customized using the redaction properties toolbar:
  - **Fill Color** determines the color of areas marked for redaction.
  - **Stroke Color** determines the color of the border of areas marked for redaction.
  - **Opacity** determines the transparency of the redaction. All content will be redacted regardless of the opacity setting.
  - **Keep Selected** keeps the redaction tool selected until a different tool is selected.
  - **Exclusive Mode** determines that the active tool ignores existing comments/annotations on the current document. This means that new elements can be placed in the active document without activating existing elements when they overlap. It also permits access to objects or base content beneath existing annotations.
  - **Fill Redacted Color** determines the color of redacted areas.
  - **Text Color** determines the color of text used to overlay redacted areas. The text content, font and size must be specified in the relevant areas of the **Properties** pane. If this is not open by default then click the **Properties** icon/text to open it.
  - Use the alignment icons to determine the alignment of overlay text.
  - Click **Repeat Overlay Text** to repeat the text within the overlay.
  - Click **Properties** to view/edit the properties of the active document.
  - The **General** properties are as follows:

- **Subject** determines the subject of the redaction. This property should not be modified.
- **Author** displays the name of the author that placed the redaction.
- **Name** shows the name of the area, as the software sees it, marked for redaction
- **Created** shows the creation time and date of the of the area selected for redaction.
- **Modified** shows the most recent modification date and time of the area selected for redaction.
- **Read Only** has the options **Yes** or **No.** When **Yes** is selected the area marked for redaction cannot be subsequently edited.
- **Printable** has the options **Yes** or **No.** When **Yes** is selected the redaction preview will be printed. After the redaction has taken place, the redaction will always be printed as the underlying data will no longer exist.
- **Locked** has the options **Yes** or **No.** When **Yes** is selected the area marked for redaction cannot be moved or resized.

- The **Style** properties are as follows:
  - **Fill Color** determines the color used for the body of the redaction preview. Black is the default color.
  - **Stroke Color** determines the color of the border of areas marked for redaction.
  - **Opacity** determines the transparency of the redaction. All content will be redacted regardless of the opacity setting.

- The **Overlay** properties are as follows:
  - **Fill Color** determines the color of the area after the redaction process.
  - **Text Color** determines the color of text used to overlay redacted sections of the document.
  - **Text** determines the textual content of the overlay.
  - **Font** determines the font used for the overlay text.
  - **Text Alignment** determines the alignment of the text used in the overlay.
  - **Repeat Text** determines whether or not the text used within the overlay is repeated. When **Yes** is selected, the text will repeat and fill up the entire area of the redacted text.

- Click **Apply All Redactions** to redact the selected areas according to the parameters outlined above.

Spell Check

Spell Check

This feature can be used to check the spelling of words within the active document. When enabled, it will scan all text within the active document. Words that are not contained within its dictionary will be displayed within the spell check pane:
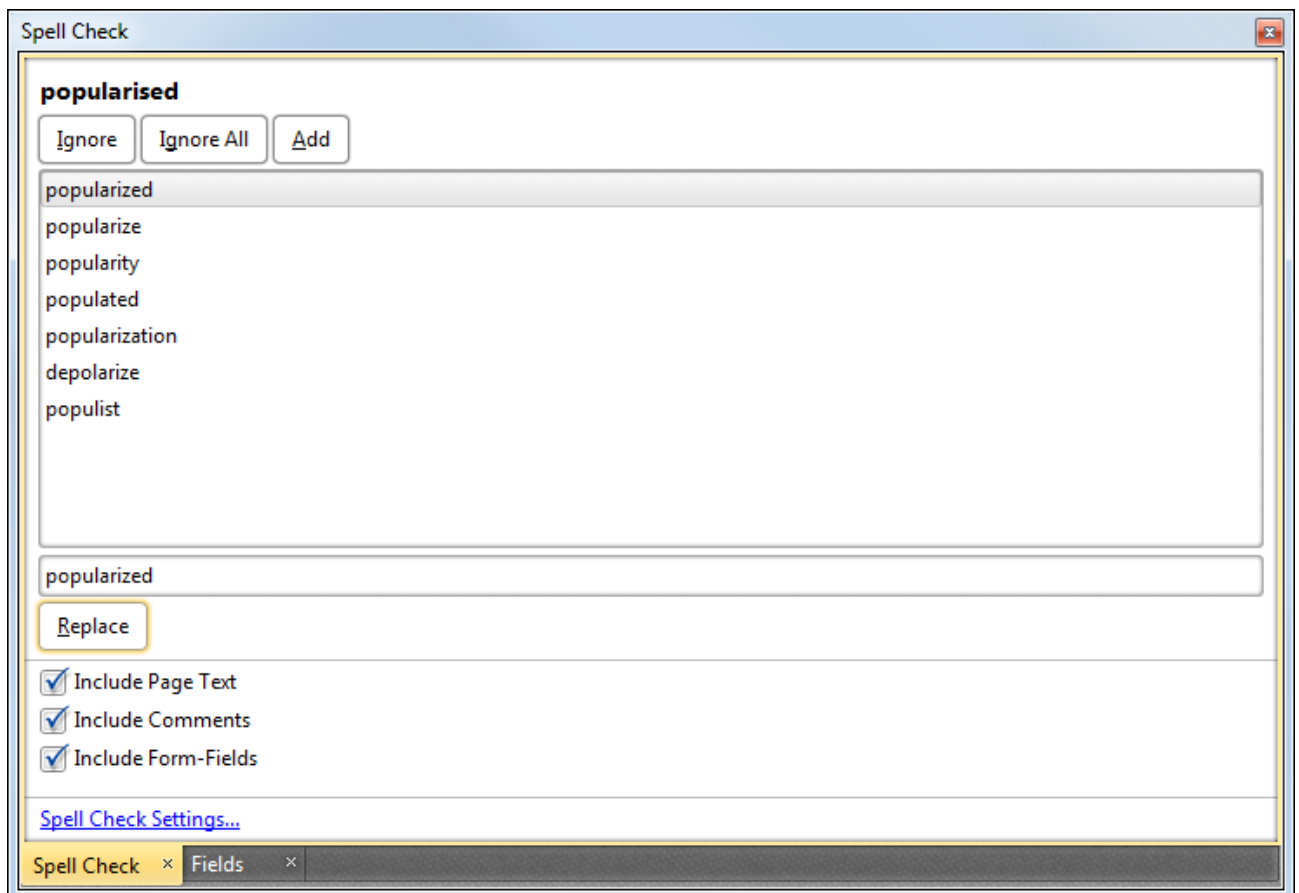
Figure 1. Spell Check Pane

The **Spell Check** feature is correcting the word "popularised" in this example.

- A list of potential candidates for the correct word is displayed.

- Select the desired word from the list and click **Replace** to replace the word in the active document with the word from the list.
- Click **Ignore** to ignore the selected word and continue to the next misspelled word.
- Click **Ignore All** to ignore all instances of the selected word within the active document.
- Click **Add** to add the selected word to the custom word list. The **Spell Check** feature will no longer recognize words within the custom word list as incorrectly spelled.
- Use the check boxes to determine the elements of the active document included in the process.
- Click **Spell Check Settings** to access the settings for this feature. See here for a list of alternative dictionaries that can be downloaded and used with the **Spell Check** feature.

Launch

Launch

Launch

This feature enables the launching of the active document within a third-party application directly from **PDF-XChange Editor.** When it is selected, a list of available applications is displayed. Click the desired application to launch the active document within it.

7.6   Comments

Comments

The **Comments** tab contains all elements of **PDF-XChange Editor** that are associated with comments. Comments are a convenient way to make notes on documents without having to edit the documents themselves. Comments remain with their associated document at all times, and feature customizable options. When the comments menu is selected, the following options are available:
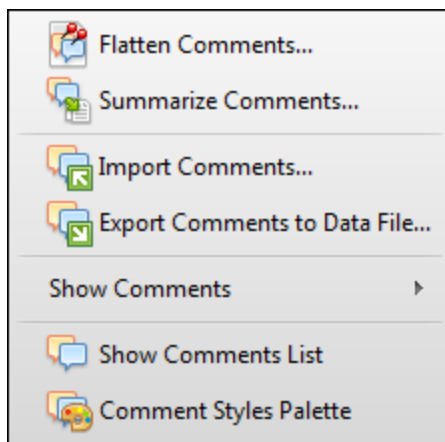
Figure 1. Comments Options

Click the links below to access the associated sections of the manual:

- **Flatten Comments** 474
- **Summarize Comments** 476
- **Import Comments** 479
- **Export Comments to Date File** 480
- **Show Comments** 481
- **Show Comments List** 483
- **Comment Styles Palette** 484

Flatten Comments

Flatten Comments

Flattening comments renders further editing impossible. It also removes all hyperlinks and flattens fillable PDF forms into selectable text. These operations cannot be reversed. Therefore, if it desired to edit annotations subsequently, then it is necessary to save a copy of files before flattening comments . When this option is selected, the following dialog box is displayed:
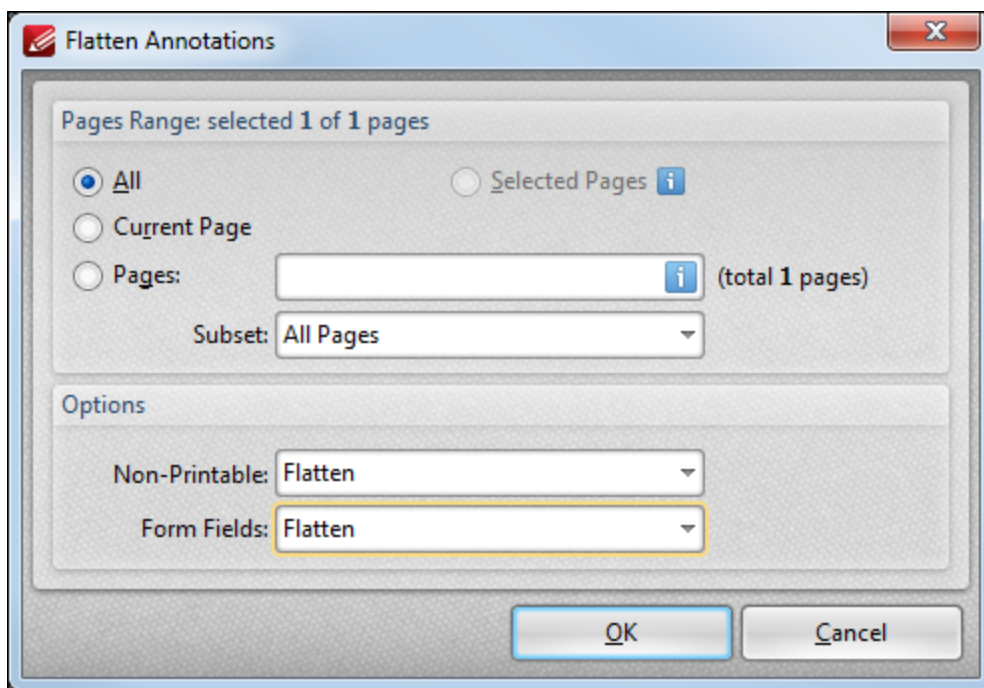
Figure 1. Flatten Annotations Dialog Box

- The **Pages Range** options are as follows:
  - Select **All** to include all pages in the process.
  - Select **Current Page** to include only the current page.
  - Use the **Pages** box to determine specific pages of the document. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- There are three options for **Non-Printable** elements and **Form Fields:**
  - **Flatten.**
  - **Left as Is.**

- **Remove.**

When the desired settings have been selected, click **OK** to to save them. Click **Cancel** to revert to previous settings and close the dialog box.

Summarize Comments

Summarize Comments

This option is included to create a summary of all comments within PDF files. Summaries can be created as PDF files, Rich Text Format files, Plain Text files, CSV files or as HTML pages. When this option is selected the following dialog box is displayed:
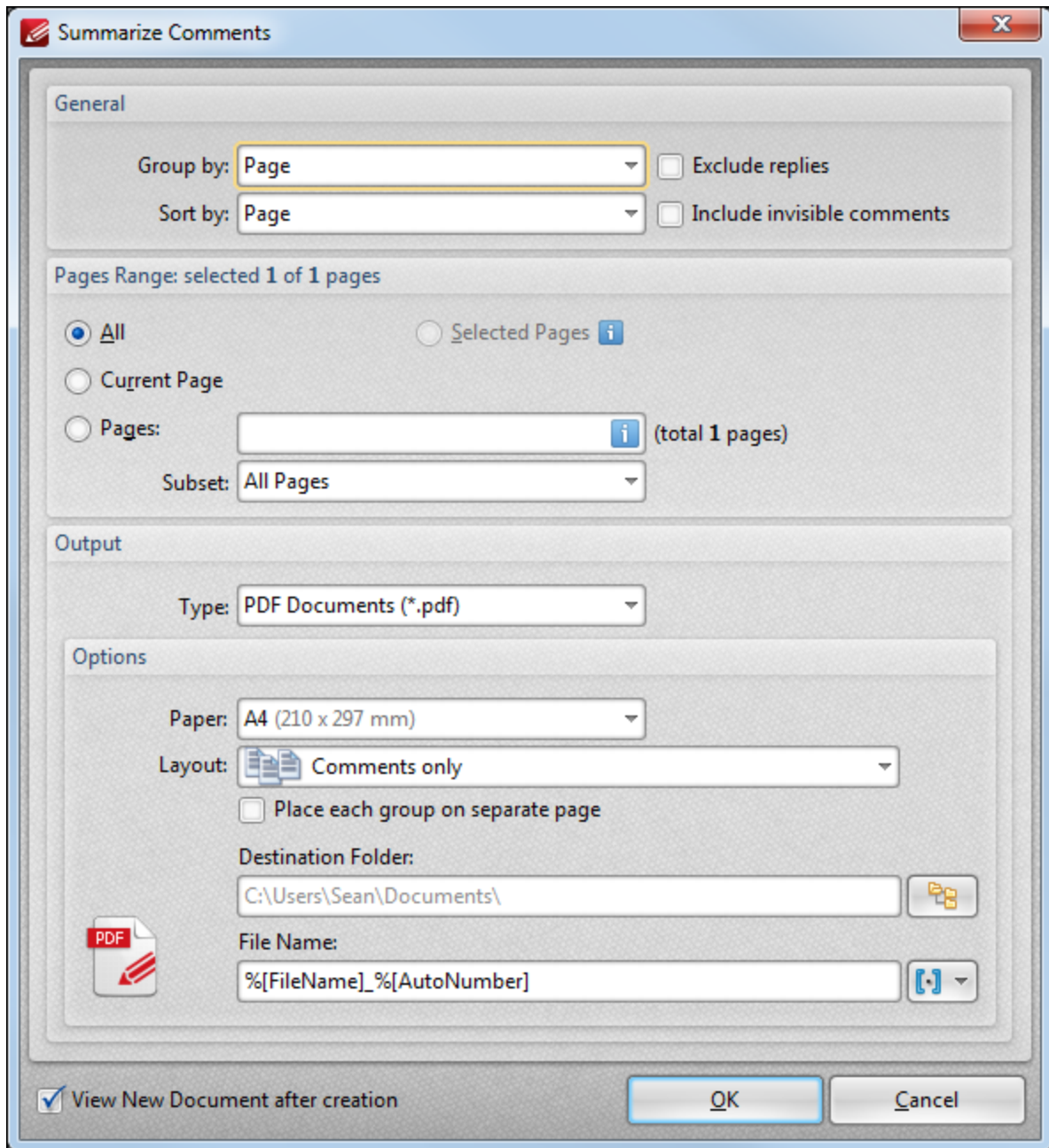
Figure 1. Summarize Comments Dialog Box

- The **Group by** setting determines the element through which comments are grouped. The options are as follows:
  - **Page**
  - **Type**
  - **Author**
  - **Date**
  - **Subject**

- The **Sort by** setting determines the element through which comments are sorted within the group. The options are the same as those in the **Group by** setting with the additional option **Visual Order.** This option sorts comments according to the visual order in which they appear in the active document.
- Select the **Exclude replies** box to exclude replies to comments from the summary.
- Select the **Include invisible comments** box to include invisible comments in the summary.
- The **Pages Range** options are as follows:
  - Select **All** to include all pages in the process.
  - Select **Current Page** to include only the current page.
  - Use the **Pages** box to determine specific pages of the document. Individual pages must be separated with a comma. Page ranges must be separated with a hyphen.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Use the **Output** menu to determine the format of the summary. The options are as follows:
  - **PDF Documents**
  - **Rich Text Format**
  - **Plain Text**
  - **HTML Files**
  - **CSV**
- The options for **PDF Documents** are as follows:
  - **Paper** determines the paper size used for the summary document.
  - **Layout** determines the layout of the summary document.
  - Select the **Place each group on separate page** box as desired.
  - Use the **Destination Folder** box to determine the destination folder for the summary document, or click the icon to select a folder on the local computer.
  - Use the **File Name** option to determine the name of the summary document. Use the macro menu to add [macros](#)[579].
- The options for **Rich Text Format** are the same as those for **PDF Documents** with the exception that the **Layout** option is not available.
- The **Plain Text** format features a setting for **Text Encoding.** Select an option from the menu as desired. The remaining settings are covered in the **PDF Documents** section.
- The options for **HTML Files** and **CSV** are covered in the **PDF Documents** section.
- Select the **View New Document after creation** box to open the document immediately after it is created.

When the desired settings have been selected, click **OK** to to save them. Click **Cancel** to revert to previous settings and close the dialog box.

Import Comments

Import Comments

This option can be used to import comments into the active document. When it is selected the **Open Files** dialog box will open. Select the desired file and click **Open** to import the file. Click **Cancel** to cancel the process and close the dialog box.

Comments can also be imported from a Form Data Format (FDF) file or an XFDF file, which is an XML-based FDF file. FDF format is the file format used when submitting, receiving and incorporating form data to a server. It can also be used to export form data to stand-alone files that can be stored, electronically transmitted and imported back into the corresponding PDF interactive form.

The positioning of imported comments matches that of the file from which they were imported. If comments appear to be placed incorrectly then it is probable that the source and recipient PDF files are different in format. For example, if comments from a ten-page document are imported into a two-page document, then only comments from the first two pages will appear.

Export Comments to Data File

![PDF icon]**Export Comments to Data File**

This option can be used to export the comments from the active document. When it is selected the **Save File** dialog box will open. Select a folder in which to save the exported comments file. The default folder is the same as that in which the active document is located. Enter a name for the file in the **File Name** box. Click **Save** to save the file. Click **Cancel** to cancel the process and close the dialog box.

Show Comments

Show Comments

This option determines the settings for when comments are shown and the categories through which they are displayed. When it is selected the following menu is displayed:
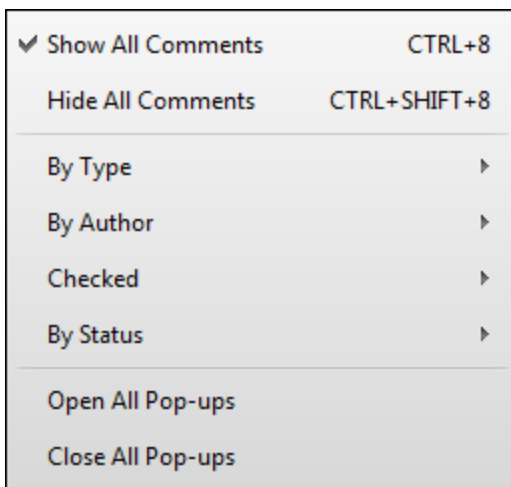
Figure 1. Show Comments Menu

- Select **Show All Comments** to display all comments associated with the active document.
- Select **Hide All Comments** to hide all comments associated with the active document.
- It is also possible to display comments according to their properties:
    - Select the **By Type** option to determine comments that will be displayed according to their type. When this option is selected, a menu will be displayed that features all the types of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
    - Select the **By Author** option to determine comments that will be displayed according to their author. When this option is selected, a menu will be displayed that features all authors of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
    - Select the **Checked** option to determine comments that will be displayed according to whether or not they are checked in the options of the **Show Comments Pane**. When this option is selected, a menu will be displayed that features two options. Select **All** to display all comments. Select **Unmarked** to display only unmarked comments.

- Select the **By Status** option to determine comments that will be displayed according to their status. When this option is selected, a menu will be displayed that features all the statuses of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
- Select **Open All Pop-ups** or **Close All Pop-ups** as desired.

Show Comments List

Show Comments List **Show Comments List**

Select this option to open the **Comments** pane. Each active document has an icon within the pane. Double-click on the icon/text of the active document to display the comments that it contains. Further options are available in the **Options** tab:

- Select **Expand All** to expand the comments for all documents.
- Select **Collapse All** to collapse the comments for all documents.
- Use the **Group By** options to group comments according to the indicated variables.
- Use the **Show** options to determine the elements of comments that are displayed in the **Comments** pane.
- The options outlined in the **Show Comments** section above are also available in this list.
- Select the **Show Comments with Hidden Flag** option as desired.
- Use the **Next** and **Previous** icons to scroll between comments.
- Click **Add Reply** to add a reply to the selected comment.
- Click the **Summarize** icon to launch the **Summarize Comments** dialog box detailed here. [476]
- Click the **Delete** icon to delete the comment currently selected.
- Click the **Properties** icon to launch the properties pane for the comment currently selected. The properties pane will launch in the main window.

Comment Styles Palette

Comment Styles Palette

Click the **Comment Styles Palette** to launch the **Comment Styles Palette** pane. The following dialog box will launch:
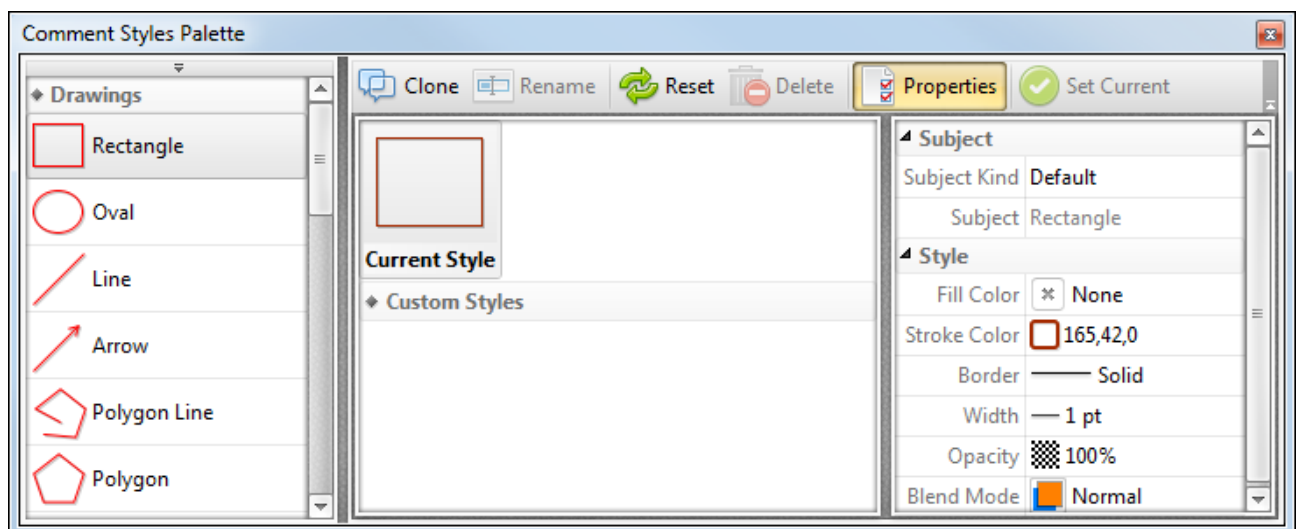
Figure 1. Comment Styles Palette

This palette details the current style for comments. The default styles for **Drawings, Measurement, Text Boxes, Text Markups** and **Text Notes** are shown in the pane on the left. Select a style to see a preview of it in the central pane. The following options are then available:

- Click **Clone** to clone the current style selected. This allows the style to be edited and saved under a new profile. Click the **Properties** tab to edit the parameters of the clone. Click the parameters within the properties pane to adjust them. When the desired parameters have been selected, click **Rename** to save the new style. It can then be accessed subsequently.
- Click **Reset** to reset the parameters of a cloned style after they have been changed.
- Click **Delete** to delete a customized style.
- The properties of the default styles can also be edited using the **Properties** tab.
- Click **Set Current** to set the style currently selected as the active style.

7.7   Form

Form

The options in the **Form** tab facilitate the editing of form fields. The **Properties Toolbar**⌐391⌐ and the **Properties Pane,** which is available via the **Edit tab**⌐253⌐, must be enabled to use these features. Additionally, enabling the **Fields Pane**⌐405⌐ simplifies greatly the process of working with form fields in PDF documents. When the **Form** tab is selected, the following menu is displayed:
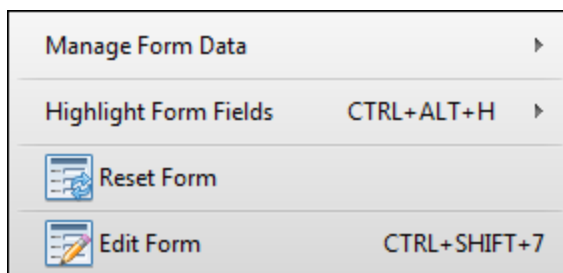
Figure 1. Form Menu

- Click **Manage Form Data** to **Import Data** or **Export Data**.
- Click **Import Data** to import data from an FDF file to an Acroform within the active document. The **Open Files** dialog box will open. Select the desired files and click **OK** to import them.
- Click **Export Data** to export data from an Acroform within the active document to an FDF file. The **Save Files** dialog box will open. Enter a name for the new file and click **Save** to export the selected form data.
- Click **Highlight Form Fields** to select which forms are highlighted within the active document. Select the desired elements from the list. The active document will then update.
- When a form is selected, click **Reset Form** to revert it to its initial state.
- Click **Edit Form** to enable the following options in the **Properties Toolbar:**

 The **Select Fields** option is used to select fields. Click an object to select it.
 The **Text Field** option is used to add new text fields to the active document. See here⌐343⌐ for further information.
 The **Check Box** option is used to add new check boxes to the active document. See here⌐350⌐ for further information.

⊙ The **Radio Button** option is used to add new radio buttons to the active document. See here³⁵⁴ for further information.

The **List Box** option is used to add a new list of choices to the active document. See here³⁵⁸ for further information.

The **Dropdown** option is used to add dropdown menus to the active document. See here³⁶² for further information.

The **Button** option is used to add action buttons to the active document. See here³⁶⁸ for further information.

The **Digital Signature** option is used to add digital signatures to the active document. See here³⁷¹ for further information.

The **Barcode** option is used to add barcode fields to the active document in order to encode the data of the form. See here³⁷⁵ for further information.

The **Keep Mode** option is used to retain the selected tool mode.

Right-click on selected forms to display the following list:
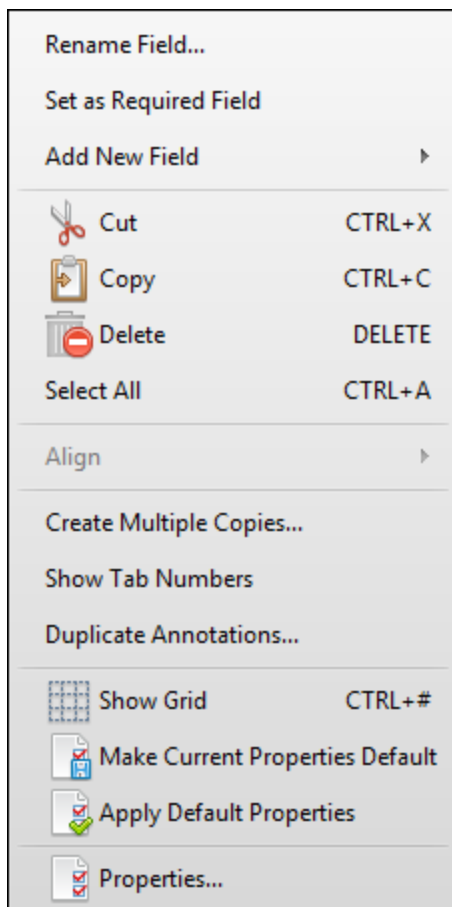
Figure 2. Form Options

• Click **Rename Field** to rename the selected field.

- Click **Set as Required Field** to determine that the selected field is classified as required. These fields will be highlighted when the **Highlight Required Fields Only** option outlined here 486 is utilized.
- Click **Add New Field** to add new fields to the active document. Available forms are detailed here. 342
- Click **Cut, Copy** or **Delete** to perform these actions on the selected form.
- Click **Select All** to select all form fields within the active document.
- Click **Align** to align multiple fields. This option is available only when multiple fields are selected. It does not affect other elements of the active document.
- Click **Create Multiple Copies** to create copies of selected forms. The dialog box displayed in *(figure 3)* will be displayed.
- Click **Show Tab Numbers** to display automated tab numbers within each form field. These numbers represent the tab order when tab is being used to move through and fill the form. The tab order can be adjusted in the fields pane, which is detailed here. 405
- Click **Duplicate Annotations** to duplicate the annotations of the selected object. The dialog box displayed in *(figure 4)* will be displayed.
- Click **Show Grid** to insert a grid in the background of the active document in order to assist with the manual placement of objects.
- Click **Make Current Properties Default** to set the properties of the object currently selected as the default properties for all subsequent objects.
- Click **Apply Default Properties** to apply the default properties to the object currently selected.
- Click **Properties** to launch the **Properties** pane, which displays the general properties of the current document.
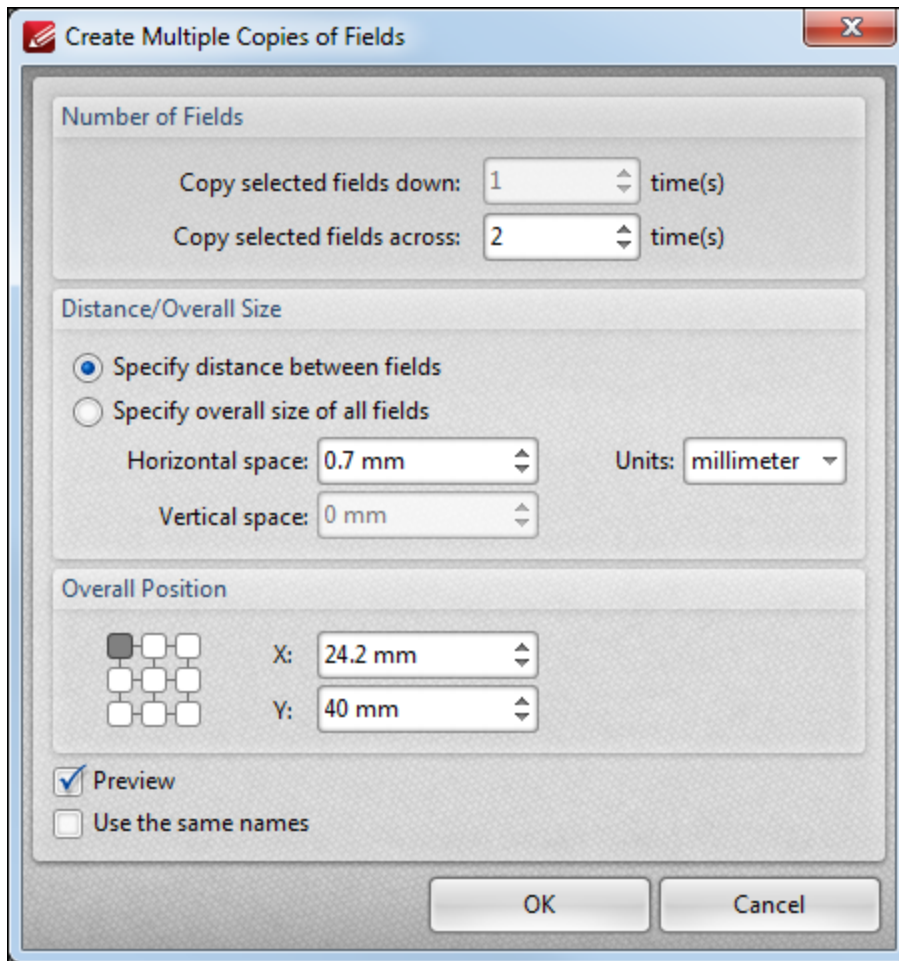
Figure 3. Create Multiple Copies of Fields Dialog Box

- The figure entered in the the **Copy selected fields down** number box determines the amount of copies placed vertically below the parent field.
- The figure entered in the the **Copy selected fields across** number box determines the amount of copies placed horizontally from the parent field.
- Select **Specify distance between fields** to determine the distance between the copies of the selected field. Enter the desired distances in the **Horizontal space** and **Vertical space** number boxes. Select a unit of measurement from the **Units** menu.
- Select **Specify overall size of all fields** to determine the size of the area in which the fields will be multiplied. The value entered in the **Overall width** and **Overall height** number boxes determines the overall width and height respectively of the area in which the selected field is multiplied. Select the desired units of measurement from the **Units** menu.
- The **Overall Position** settings can be used to determine the overall position of copied fields. Edit the **X** and **Y** values as desired. The position selected in the grid determines the starting point for measurements when creating multiple copies.
- Select the **Preview** box to place a preview on the document before creating copied fields.

- Select the **Use the same names** box as desired. This is useful for fields that require the same user data or other elements such as the current date. Copies will feature the same name as their original followed by a unique number.
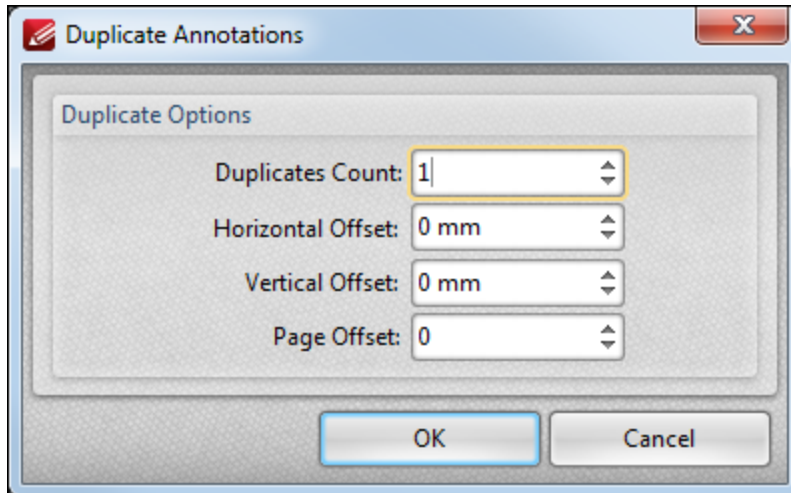
Figure 4. Duplicate Annotations Dialog Box

This window can be used to allow the simple duplication of the selected object:
- The value entered in the **Duplicates Count** number box determines the amount of duplicates created.
- The value entered in the **Horizontal Offset** number box determines the horizontal offset from the original object.
- The value entered in the **Vertical Offset** number box determines the vertical offset from the original object.
- The value entered in the **Page Offset** number box determines the page offset from the original object.

7.8　Object

Object

The settings in the **Object** tab facilitate the transformation of selected objects. There are two options:

Transform Selection

This option enables the editing of the position, size and rotation of the selected object. When it is selected the following dialog box is displayed:
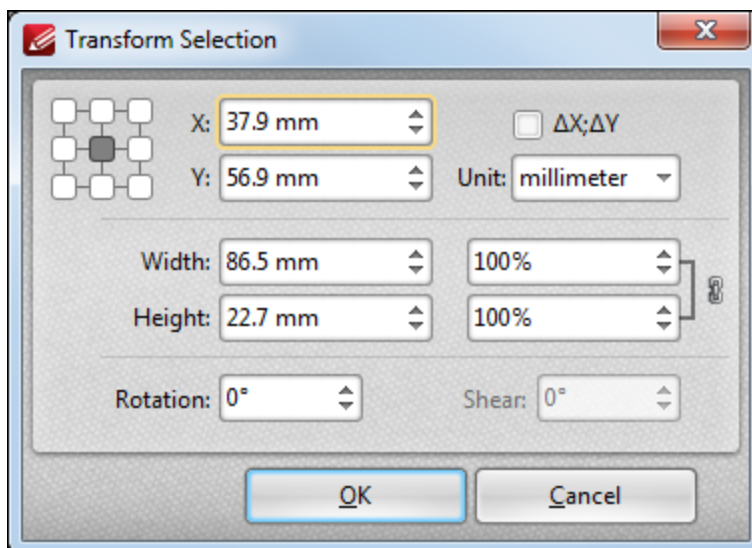
Figure 1. Transform Selection Dialog Box

- The **X** and **Y** number boxes determine the repositioning of the selected object. The **X** value is the horizontal plane and the **Y** value is the vertical plane.
- Select the ΔX; ΔY box to determine offset values relative to the current position of the object.
- Use the **Unit** menu to select the units of measurement.
- Use the **Width** and **Height** boxes to adjust the size of the selected object.
- Use the **Rotation** box to determine in degrees the rotation of the selected object.
- Use the **Shear** box to determine a shear angle. This will slant the selected object along a horizontal axis.

Duplicate Annotations

This option duplicates selected annotations. Annotations are taken from the current pages and duplicated on the following pages according to the settings specified in the dialog box that is launched when this option is selected:
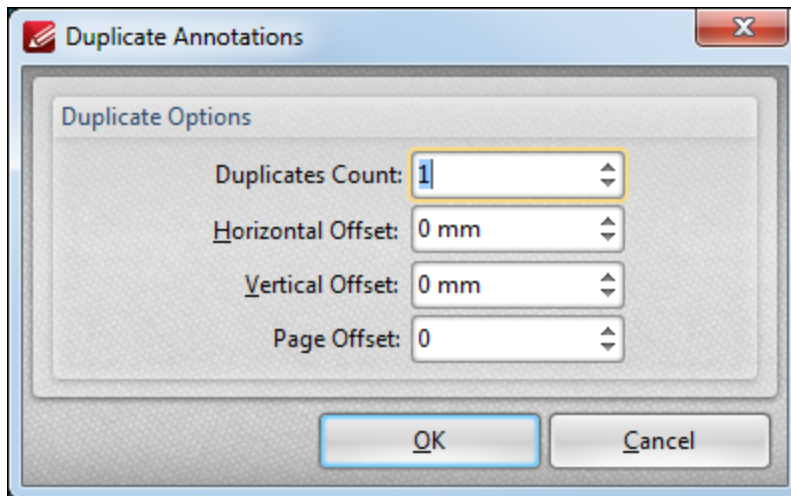
Figure 2. Duplicate Annotations Dialog Box

- Use the **Duplicates Count** box to determine the number of duplicates created.
- Use the **Horizontal Offset** box to determine the horizontal offset.
- Use the **Vertical Offset** box to determine the vertical offset.
- Use the **Page Offset** box to determine the number of pages that will not feature the annotation.

7.9 Tools

Tools

Tools are used to edit and manipulate documents within **PDF-XChange Editor.** When this tab is selected the following menu will be displayed:
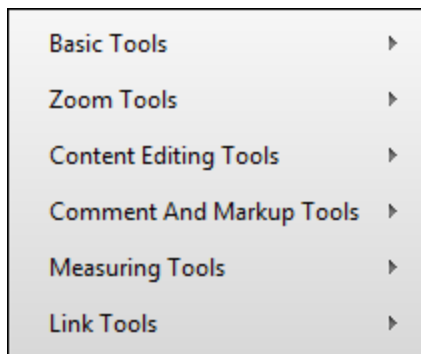
Figure 1. Tools Menu

Basic Tools

The **Basic Tools** are the tools used most frequently within **PDF-XChange Editor.** There are three options in this menu: **Hand Tool, Snapshot Tool** and **Select Text Tool.** They are explained here. 336

The remaining options of the **Tools** menu are explained at the links below:

- **Zoom Tools** 493
- **Content Editing Tools** 495
- **Comment and Markup Tools** 498
- **Measuring Tools** 510
- **Link Tools** 512

Zoom Tools

Zoom Tools

These tools are used to zoom within the active document. There are three options in this menu: the **Zoom Tool, Loupe Tool** and **Pan and Zoom Tool:**

- The **Zoom Tool** increases the zoom percentage of the active document. When it is selected the pointer is replaced with a magnifying glass icon. Click to zoom to the location at which the icon is located in the active document.

- The **Loupe Tool** launches the loupe pane and transforms the pointer into a rectangular box. The rectangular box can be relocated anywhere in the active document. The area that it covers within the active document is displayed in the loupe pane:
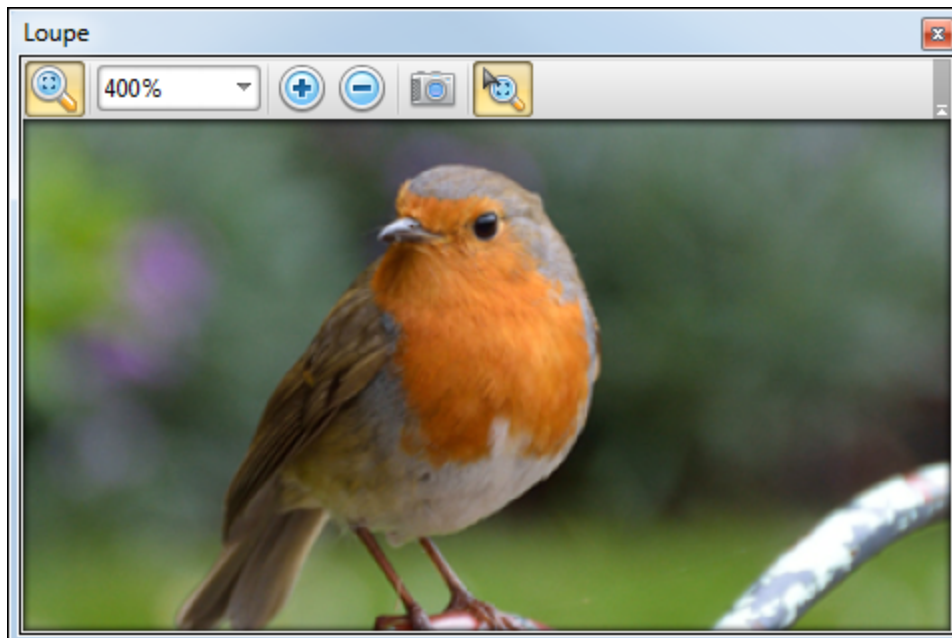
Figure 1. Loupe Pane

- Use the number box or the plus and minus icons to determine the level of zoom displayed in the pane. The rectangle in the active document will adjust proportionately.
- Use the Snapshot icon to take a snapshot of the image displayed in the pane. A bitmap copy of the selection is pasted to the clipboard of the local computer.

- Use the track mouse icon to determine whether or not the loupe follows the pointer.

- The **Pan and Zoom Tool** launches the **Pan and Zoom** pane:
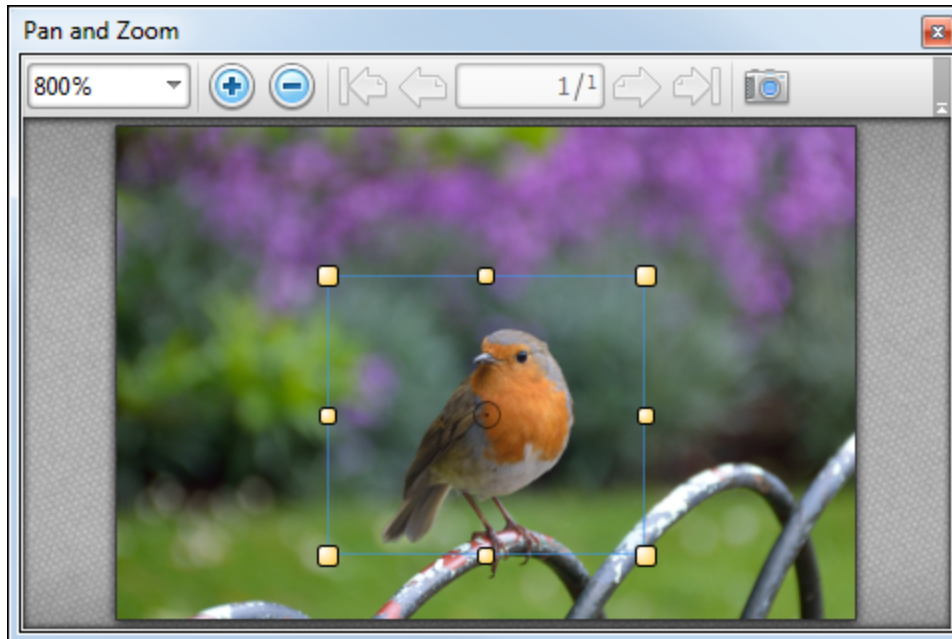
Figure 2. Pan and Zoom Pane

- The blue rectangle represents the current view of the active document.
- Adjust the edges of the rectangle to manipulate the pan and zoom. Alternatively, use the icons to zoom incrementally, or enter a custom zoom percentage in the number box.
- Use the arrow icons to move between the pages of the active document.
- Use the snapshot icon to take snapshots of the current view. A bitmap copy of the selection is pasted to the clipboard of the local computer.

Content Editing Tools

Content Editing Tools

The content editing tools are used to edit the content of the active document. There are two options in this menu:

- The **Edit Content Tool** is used to edit exiting content. When it is selected, the active document will be divided into editable sections based on the images and text it contains. These sections can then be resized and relocated. Alternatively, click and drag the mouse to select custom areas for editing. When areas are selected they will appear as below:
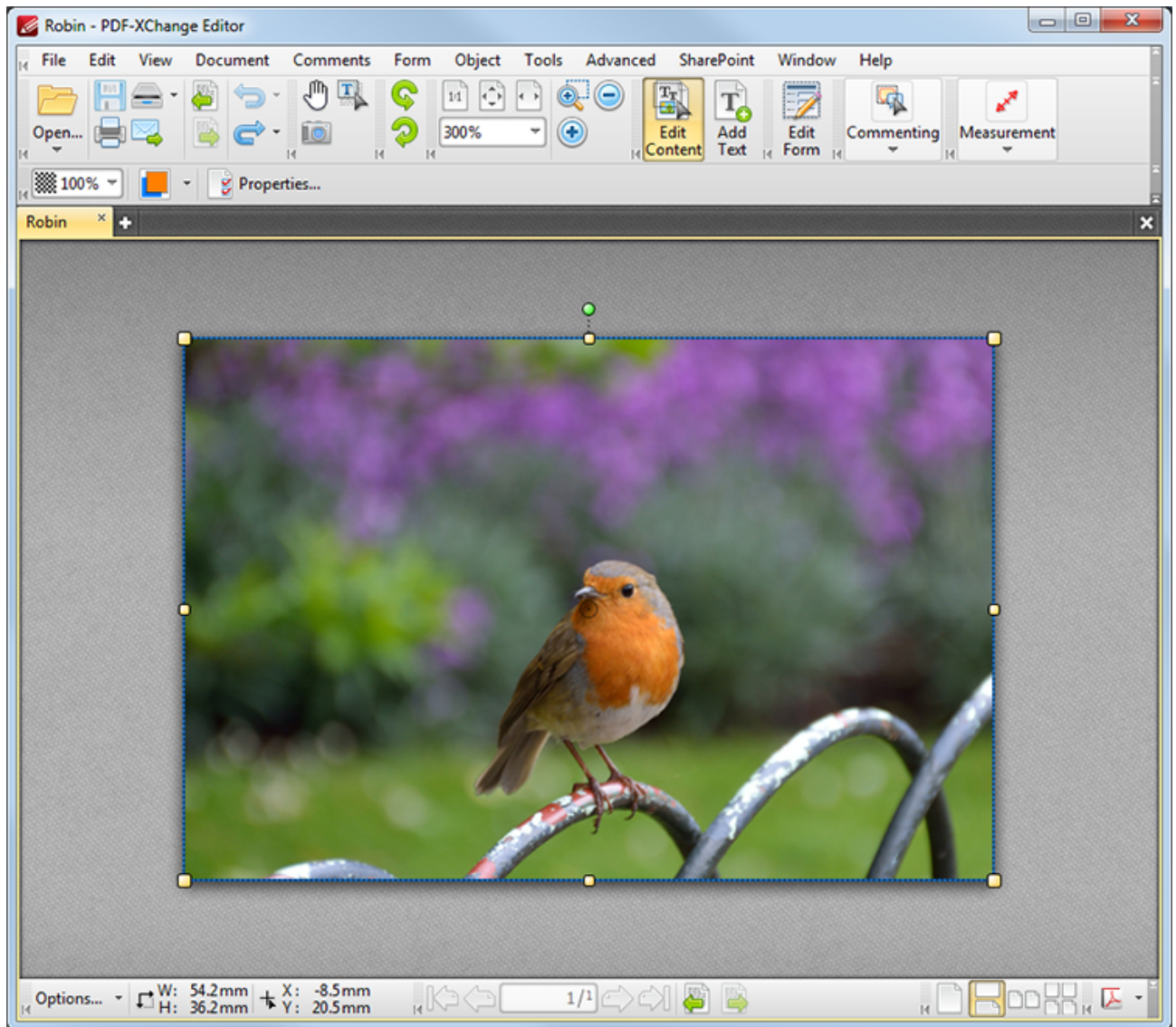
Figure 1. Edit Content Tool, Image Selected

- Select and drag the yellow icons to resize the image.
- Select and drag the circle at the center to move images.
- Select and drag the green icon at the top to rotate the image. During this process a number box will appear at the center of the image. This displays the angle of rotation in relation to the original location.
- Right-click objects to launch the following menu:
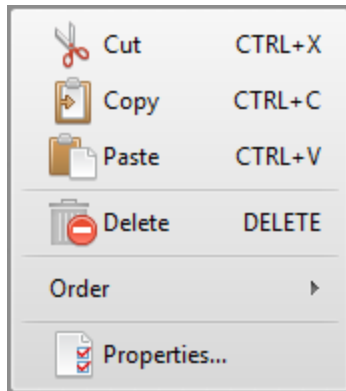
Figure 2. Right-Click Options Menu

- Click **Cut, Copy, Paste** or **Delete** to perform these standard operations with selected content.
- Click **Order** to determine how selected content appears in relation to overlapping content:
  - Select **Bring to Front** to bring the selected content to the front in cases of multiple objects overlapping.
  - Select **Send to Back** to send the selected content to the back in cases of multiple objects overlapping.
  - Select **Bring Forward** to bring the selected content to the front in cases of two objects overlapping.
  - Select **Send Backward** to send the selected content to the back in cases of two objects overlapping.
- Click **Properties** to adjust the properties of the selected object. These settings are explained <u>here.</u> [258]

- The **Add Text Tool** is used to add text to existing content. When it is selected the pointer icon will change into a cross icon. Click and drag this icon to create the space in which new text will be entered. This is enabled when the mouse button is released. When the this tool is being used, customizable options are available in the **Properties Toolbar.** See <u>here</u> [391] for an explanation of these options.

Comment And Markup Tools

Comment And Markup Tools

These tools are used to mark up, comment on and/or annotate PDF files. When this submenu is selected it appears as below:
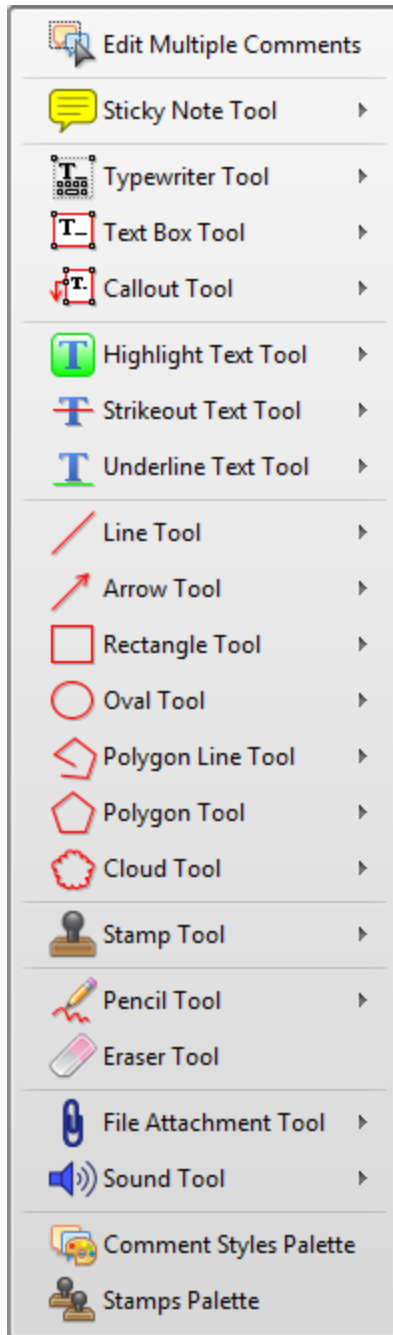
Figure 1. Comment and Markup Tools Submenu

Add list of links to subsequent chapters

All but two of these are explained here. ³⁷⁹ The remaining two options are:

The **Comment Styles Palette,** which is explained here. ⁴⁸⁴

The **Stamps Palette** opens the **Stamps Palette** pane, which details available stamps for the active document. Stamps are a useful way to designate documents. The **Stamps Palette** pane appears as follows:
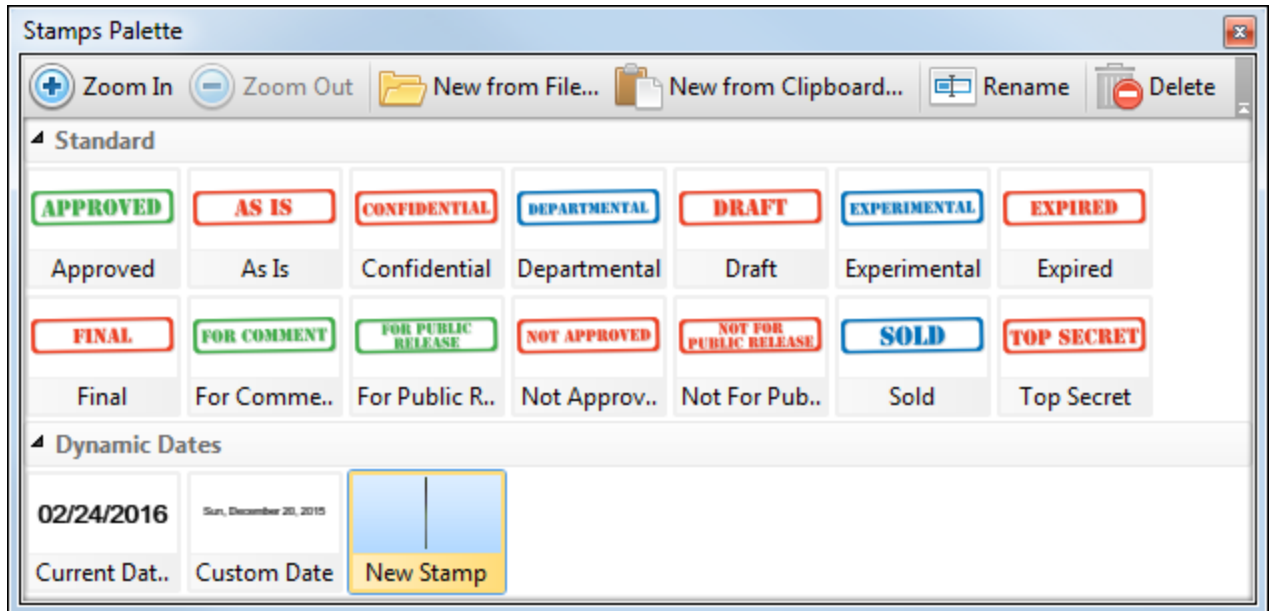
Figure 1. Stamps Palette Pane

- Click on stamps to select them. They will be displayed with the pointer. Place them within the active document and click to add them.
- Use the **Zoom In** and **Zoom Out** icons to zoom in/out on available stamps.
- Click **New from File** to create a new stamp. The **Open Files** dialog box will launch. Select a file from the local computer. The dialog box displayed in *(figure 2)* will then launch.
- Click **New From Clipboard** to create a stamp from the image currently located on the clipboard of the local computer.
- Click **Rename** to rename the stamp currently selected. This feature is not available for default stamps.
- Click **Delete** to delete the stamp currently selected. (This feature is not available for default stamps).
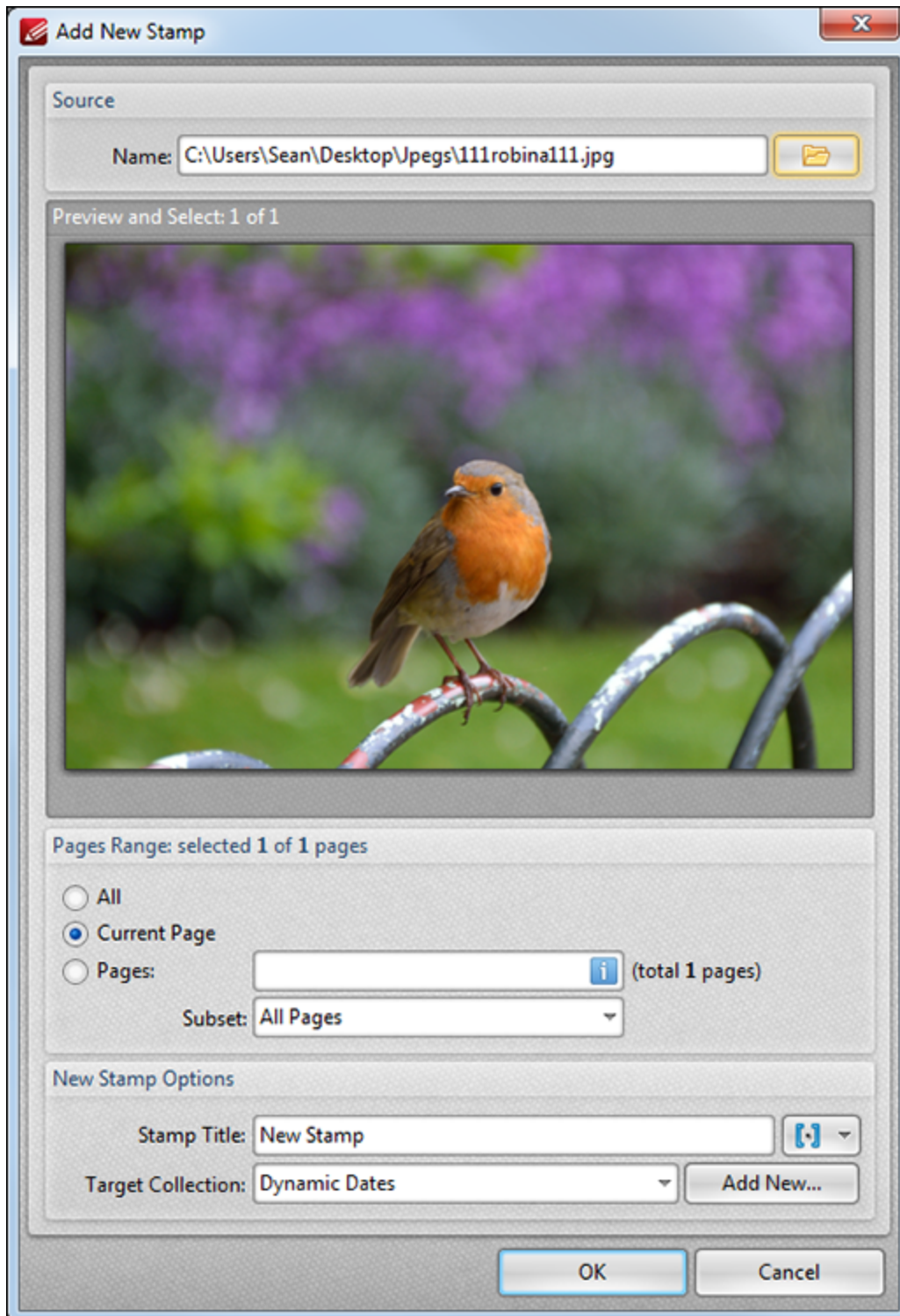
Figure 2. Add New Stamp Dialog Box

- Use the **Source** menu, or click the folder icon, to select an alternative file to use as the stamp.
- The **Pages Range** options determine the pages of the file that will be used for the stamp:
  - Select **All** to use all the pages of the file.
  - Select **Current Page** to use only the current page.

- Select **Pages** to specify pages from the file. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- If more than one page is selected then a new stamp will be created for each page.
- Enter a name of the new stamp in the **Stamp Title** text box. Macros⌐579⌐ can be include in the stamp title.
- Use the **Target Collection** menu to determine the collection to which the new stamp will belong. Alternatively, click **Add New** to create a new collection.

When the desired details have been entered, click **OK** to create the new stamp. Click **Cancel** to cancel the process and close the dialog box.

Adding Dynamic Elements to Stamps

JavaScript can be included in stamps to add dynamic elements. Follow the steps below to achieve this:

1. Move to the **Stamps Palette** detailed above.

2. Click **New From File.**

3. Select the file that will be used to create the stamp.

4. Follow the steps outlined beneath *(figure 2)* to create and save a new stamp.

5. Close **PDF-XChange Editor.**

6. Move to the stamp within its destination folder on the local computer. Please note that the default folder is **C:\Users\<User>\AppData\Roaming\Tracker Software\PDFXEditor\3.0\Stamps.**

7. Move the stamp to a new location that is outside the stamp directory, for example the desktop. (This step is necessary. If it is not included then changes cannot be saved).

8. Open the stamp with **PDF-XChange Editor.**

9. Use the **Form Toolbar** ⌐342⌐ to add a text field to the stamp.

10. Select the text field and click **Properties** in the **Edit** tab.

11. Under the **Value Calculation** property, use the menu to select **Custom Action.** The entry Calculate action / **Run a JavaScript** will appear.

12. Click the ellipsis icon (three dots) on the right of the entry. The **Edit Action: "Run a JavaScript"** dialog box will open.

13. Enter the desired JavaScript and click **OK.**

14. Save the file and close **PDF-XChange Editor.**

15. Return the stamp to its original destination folder. It will then be available in the specified stamps collection.

Edit Multiple Comments

Edit Multiple Comments

Select **Edit Multiple Comments** to enable the feature for selecting groups of comments to edit simultaneously. When a group of comments have been selected a new border appears around them, as detailed below:
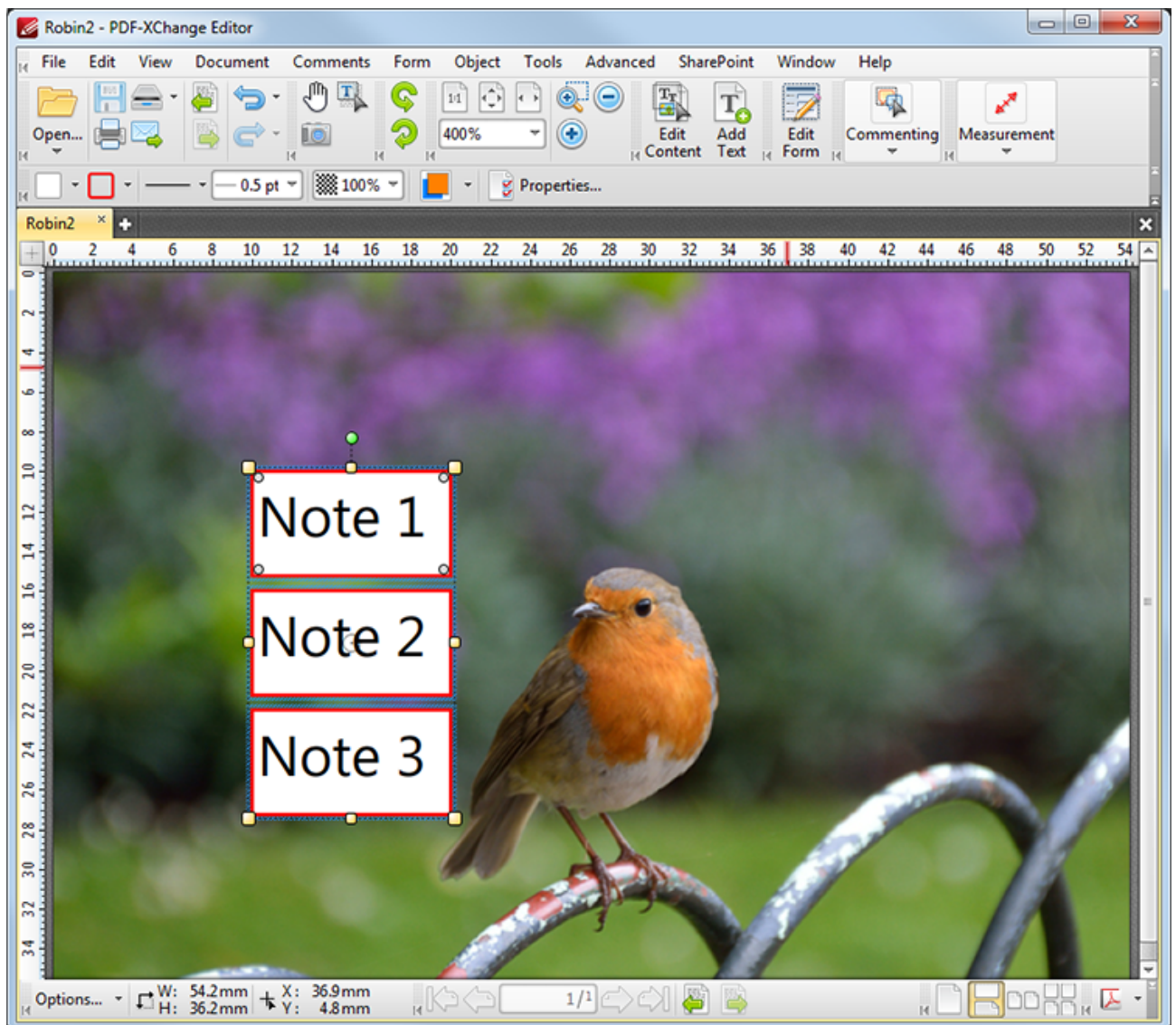
Figure 1. Edit Multiple Comments, Group Select

- Select and drag the yellow icons to resize the content.
- Select and drag the circle at the center to move the content.
- Select and drag the green icon at the top to rotate the content. During this process a number box will appear at the center. This displays the angle of rotation in relation to the original location.
- Right-click the content to launch the following menu:
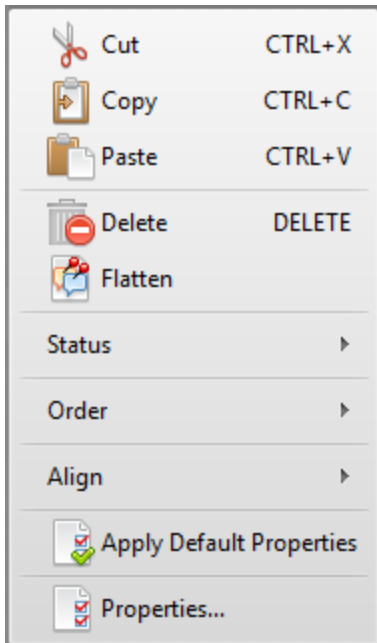
**Figure 3.** Group Comments Options

- Click **Cut, Copy, Paste** or **Delete** to perform these standard operations with the content.
- Click **Flatten** to disable subsequent editing of the content.
- Click **Status** to define the status of the content. The options are **Accepted, Cancelled, Completed** and **Rejected.**
- Click **Order** to determine how selected content appears in relation to overlapping content:
    - Select **Bring to Front** to bring the selected content to the front in cases of multiple objects overlapping.
    - Select **Send to Back** to send the selected content to the back in cases of multiple objects overlapping.
    - Select **Bring Forward** to bring the selected content to the front in cases of two objects overlapping.
    - Select **Send Backward** to send the selected content to the back in cases of two objects overlapping.
- Click **Align** to align and standardize the content as desired. The options are self-explanatory.

- Click **Apply Default Properties** to change the properties of content to the default values as defined in the **Comment Styles Palette,** as detailed below.
- Click **Properties** to adjust the properties of the selected object. These settings are explained here. 258

Sticky Note Tool

Sticky Note Tool

Select the **Sticky Note Tool** to add add sticky note comment to PDF files. When the **Sticky Note Tool** is selected, click within the current document in order to place a sticky note. It will appear as below:
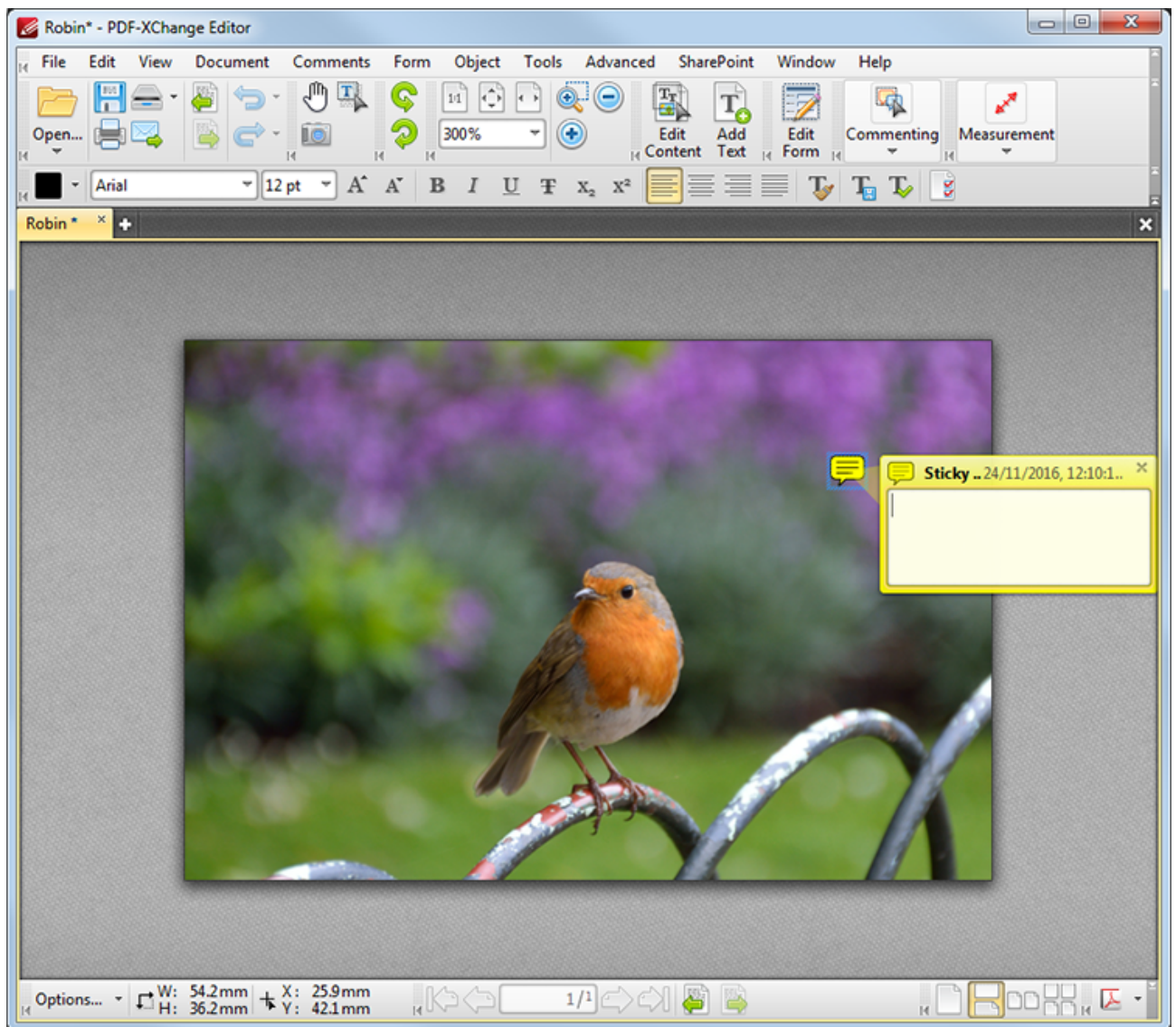
Figure 1. Sample Sticky Note Tool

- Click within the blue rectangle and drag to move the sticky note.
- Enter the note content within the white area. Use the properties pane to view/edit the font style and paragraph settings. (Right-click on sticky notes and select **Properties** to view the properties pane). This content will be displayed when the pointer is hovered over the note subsequently.
- Use the properties pane to edit the style of sticky notes as desired.
- Press **CTRL+E** to enable sticky note shortcuts within the **Properties Toolbar.** These facilitate faster editing of the color and icon used for the sticky note. When these elements have been changed from their defaults
- Right-click the sticky note to launch the following menu:
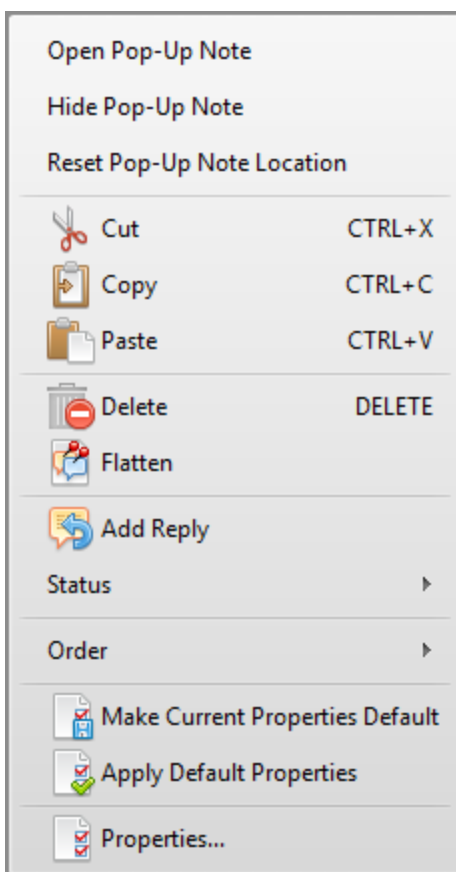
Figure 2. Sticky Note Options

- Click **Open Pop-Up Note** to view/edit the existing content of the sticky note.
- Click **Hide Pop-Up Note** to close the view/edit pane of the sticky note.
- Click **Reset Pop-Up Note Location** to reset the position of the view/edit pane.
- Click **Cut, Copy, Paste** or **Delete** to perform these standard operations with the sticky note.
- Click **Flatten** to disable subsequent editing of the content.

- Click **Add Reply** to add a reply to the sticky note in the form of a second sticky note. Further responses can be added as desired.
- Click **Status** to define the status of the content. The options are **Accepted, Cancelled, Completed** and **Rejected.**
- Click **Order** to determine how selected content appears in relation to overlapping content:
  - Select **Bring to Front** to bring the selected content to the front in cases of multiple objects overlapping.
  - Select **Send to Back** to send the selected content to the back in cases of multiple objects overlapping.
  - Select **Bring Forward** to bring the selected content to the front in cases of two objects overlapping.
  - Select **Send Backward** to send the selected content to the back in cases of two objects overlapping.
- Click **Make Current Properties Default** to set the properties of the selected sticky note as the default properties for future sticky notes.
- Click **Apply Default Properties** to apply the default properties to the selected sticky note.
- Click **Properties** to adjust the properties of the selected object. These settings are explained here. 258 When custom details

Typewriter Tool

Typewriter Tool

Select the **Typewriter Tool** to add add text comments to PDF files. When the **Typewriter Tool** is selected, click within the current document in order to add a text-based note. It will appear as below:

Measuring Tools

Measuring Tools

The measuring tools are used to measure specific elements of the active document. The **Distance Tool, Perimeter Tool** and **Area Tool** are explained <u>here.</u> ³⁸¹

The **Calibrate Measurement Tool** can be used to determine scales for use in conjunction with the measuring tools. When it is selected the pointer will become a crosshairs. Click to determine the starting point of the distance to be calibrated. A blue line will appear within the document. Drag it the point at which the distance to be calibrated finishes. The **Calibration** dialog box will then open:
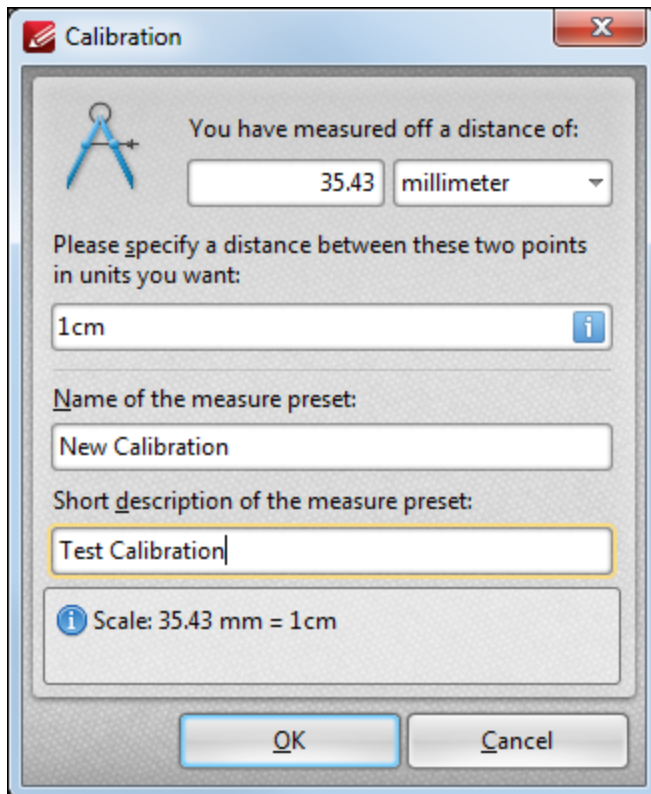
Figure 1. Calibration Dialog Box

- The distance determined in the step outlined above is detailed in the top number box. Select a unit of measurement from the list.
- Use the second number box to determine the scale. Enter a numerical amount followed by the desired unit of measurement for the scale.
- Name and describe the calibration.
- The scale is detailed in the lower box.
- Click **OK** to save the calibration. Click **Cancel** to cancel the process and close the dialog box.

When new calibrations have been determined, they can then be selected in the main window of **PDF-XChange Editor** when using the measurement tools. Click the **Scale** menu in the **Properties Toolbar** 391 to select scales. Alternatively, right click on a measurement Distances determined using the measurement tools will then be displayed in the **Distance Info** tab that appears automatically in the main window when using these tools.

Link Tools

Link Tools

The Link Tools are combined into a single tool: The **Link Creation Tool.** This tool is used to create links within the active document. When it is selected the pointer becomes a crosshair. Click and drag the crosshair to determine the location and size of the link. The **Browse for Link Target** dialog box will then open:
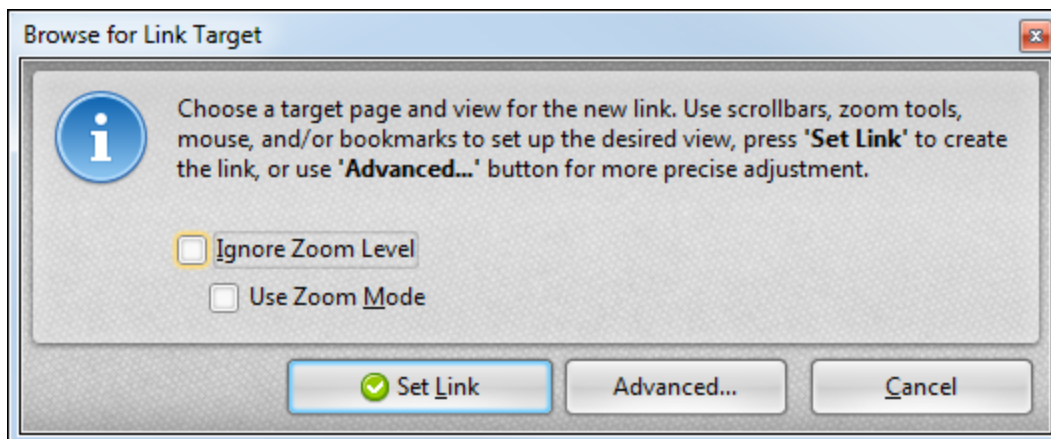
Figure 1. Browse for Link Target Dialog Box

- Select the **Ignore Zoom Level** box as desired.
- Select the **Use Zoom Mode** box to use zoom mode in order to browse for the link target.
- Click **Set Link** to apply the link area determined.
- Click **Cancel** to cancel the process and close the dialog box.
- Click **Advanced** to determine the advanced settings for the link. The following dialog box will open:
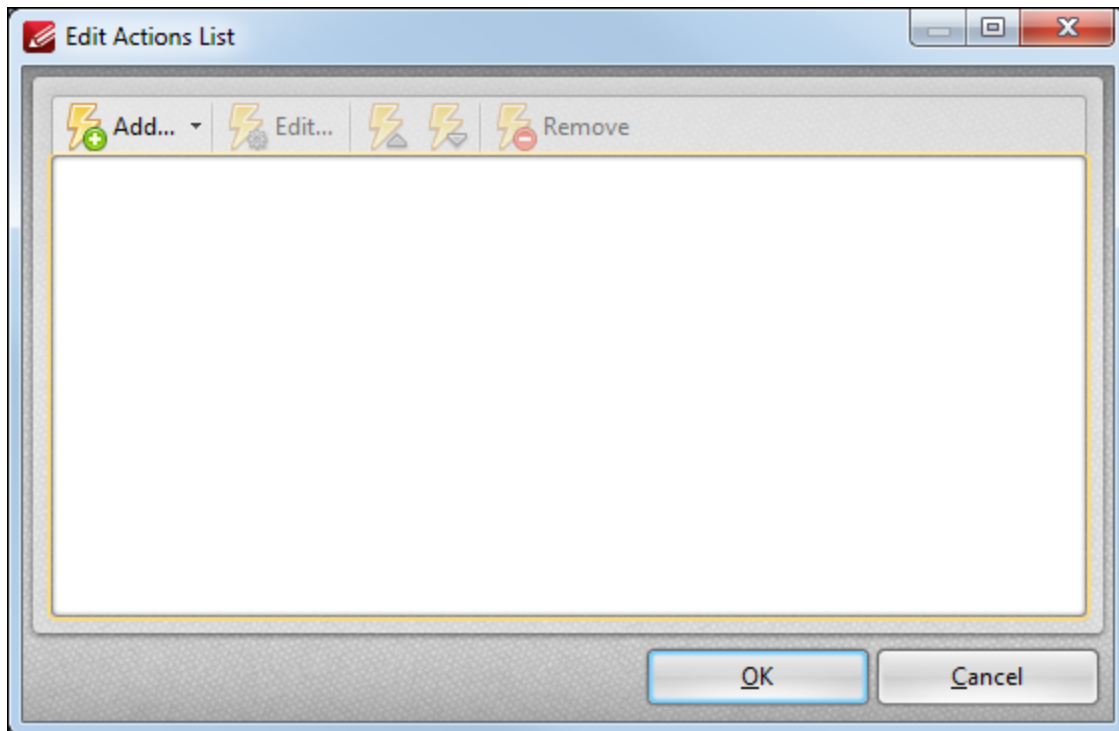
Figure 2. Edit Actions List Dialog Box

- Click **Add** to add actions to the list. Actions will be executed when the link is selected.
- It is possible to add multiple actions.
- Select actions once they have been added to the list and click **Edit** to adjust the settings.
- Click the arrow icons to move selected actions up or down within the list.
- Click **Remove** to remove actions from the list.

The following actions are available:

- **Run a JavaScript** 517
- **Go to Page Options** 515 **(Go To a Page in the Document**, **Go To a Page in Another Document** and **Go To a Page in an Embedded Document).**
- **Open a Web Link** 518
- **Open a File** 519
- **Execute a Command** 521
- **Reset a Form** 522
- **Submit a Form** 523
- **Play a Sound** 525
- **Show/Hide a Field** 526
- **Read an Article** 527

Click actions to browse to the associated page of the manual.

Go To Page Options

Go To Page Options

This action relocates the main window to a different page in the active document. When it is selected the following options are available:
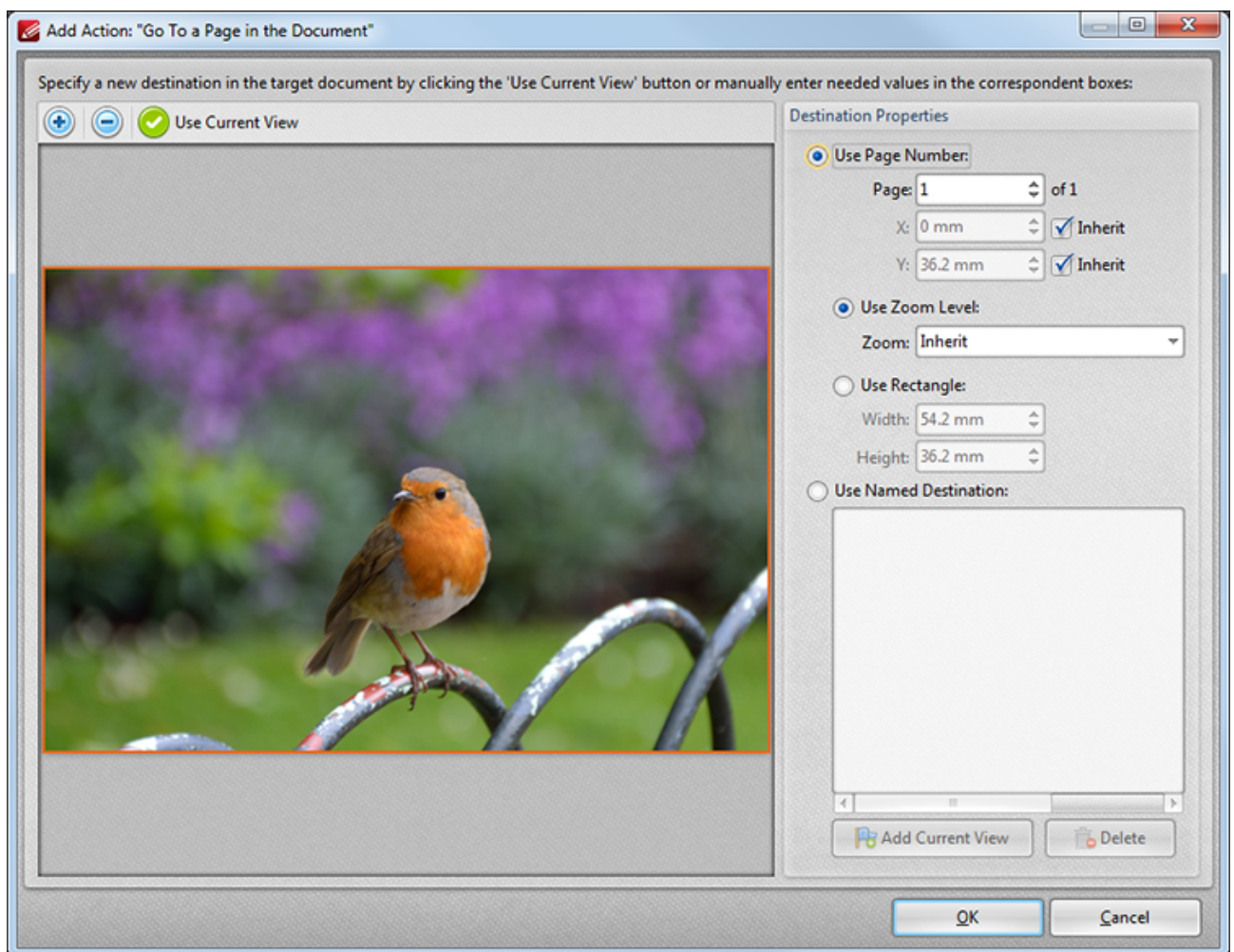
Figure 1. Go To Page Dialog Box

- Use the plus and minus icons to zoom in on/out of the active document.
- Click **Use Current View** to use the view currently displayed in the preview pane as the location to which the link relocates.

- Alternatively, use the **Destination Properties** options to select a page. Pages can be determined by either their page number or by a named destination.
- Select the **Use Page Number** option button to determine the link using the relevant page number. The figures entered in the **X** and **Y** boxes determine the location on the horizontal and vertical planes respectively. When this option is being used it is also possible to determine the zoom level or use a rectangle to designate the destination:
    - Select the **Use Zoom Level** option button to determine the level of zoom used in the link. Use **Inherit Zoom** to save the zoom level of the active document when creating the link.
    - Use the **Use Rectangle** option button to designate the destination using a rectangle. Enter values for the **Width** and **Height**.
- Alternatively, select the **Use Named Destination** option button to select a destination that has already been determined within the document, or click **Add Current View** to create a new named destination from the current view.

When the desired details have been selected, click **OK** to apply them and close the dialog box. Click **Cancel** to cancel the process and close the dialog box.

Go To a Page in Another Document

This action relocates the main window to a page in a different document. When it is selected the **Open Files** dialog box will be displayed. Select the file with which the link will be associated. The remaining options are the same as those detailed in the **Go to a Page in the Document** option above.

Go To a Page in an Embedded Document

This action relocates the main window to a different page in an embedded document. When it is selected the **Choose Root Document** dialog box will be displayed. Select either **This document** or **Choose external document**. When using the latter case, enter the name of the document into the text box, or click the icon to select a document from the local computer. The remaining options are then the same as in the two outlined immediately above.

Run a JavaScript

Run a JavaScript

This action executes a javascript when the link is selected. Click the action to add the javascript. The **Add Action** dialog box will open. Enter the desired javascript into the dialog box and click **OK** to save.

Open a Web Link

Open a Web Link

This action launches a web link in the default browser of the local computer. When it is selected the **Add Action** dialog box will be displayed. Enter the desired URL in the box indicated. Click **OK** to save the link. Click **Cancel** to cancel the process and close the dialog box.

PDF-XChange Editor retains links when documents are subsequently converted to **.docx** format via the **Export to Microsoft Word Document** option of the **Export** 237 feature.

Open a File

Open a File

This action opens the file determined in the dialog box that displays when it is selected:
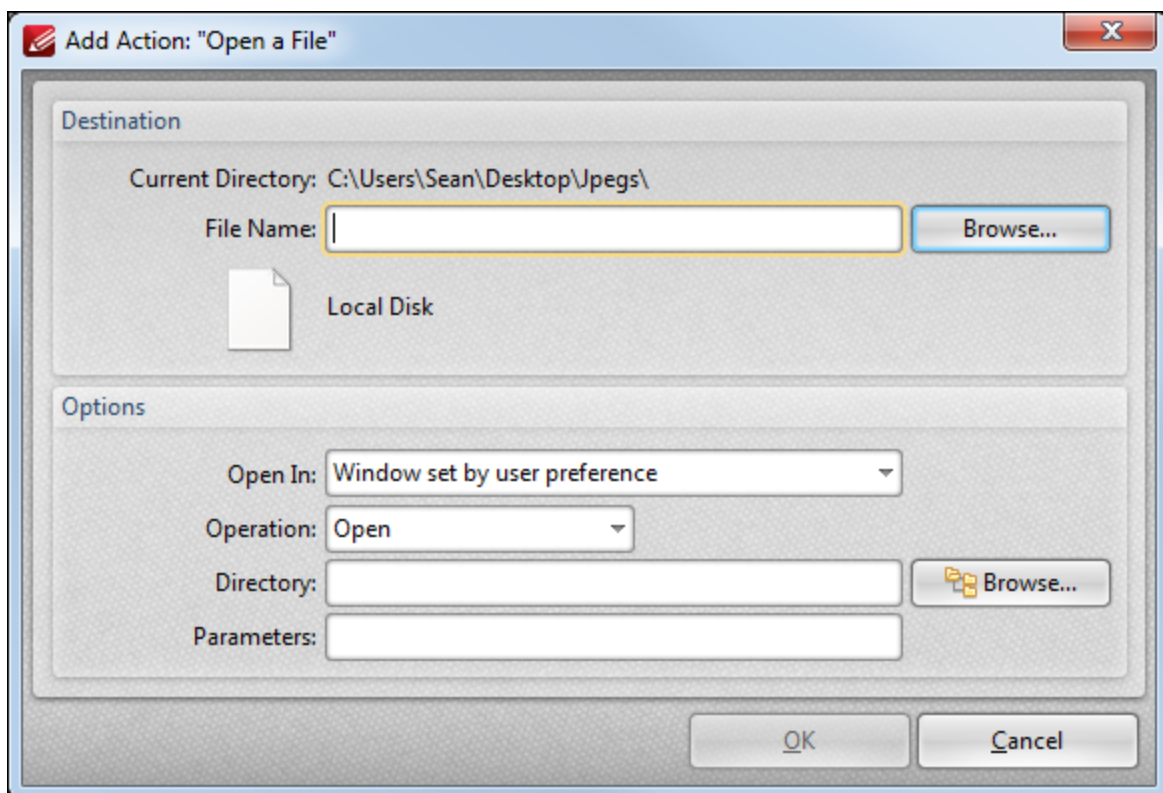
Figure 1. Open File Dialog Box

- Enter the name of the file to be opened in the **File Name** text box, or click the **Browse** button to select a file from the local computer.
- Use the **Open In** menu to select where the file opens.
- Use the **Operation** menu to determine the operation that takes place when this option is selected. Select **Open** for the file to open or **Print** for the file to print.
- Use the **Directory** text box to determine the directory of the desired file, or click **Browse** to select a folder from the local computer.

- Use the **Parameters** text box to include further parameters associated with the default program used to open the specified file. Available parameters depend on the command line options used in conjunction with the software.

When the desired parameters have been selected, click **OK** to save the link. Click **Cancel** to cancel the process and close the dialog box.

Execute a Command

Execute a Command

This option executes a command when the link is selected. The following dialog box is displayed during the setup process:
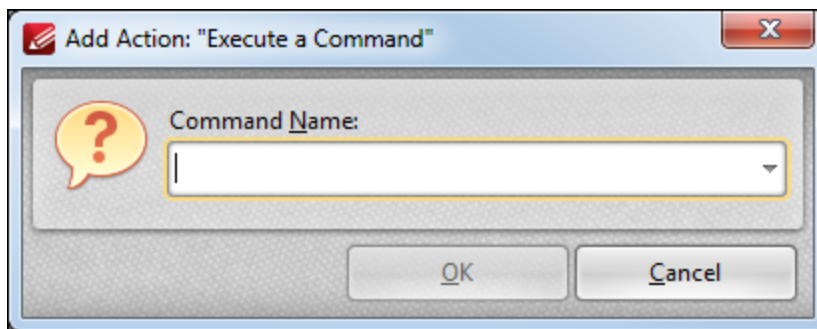
Figure 1. Execute Command Dialog Box

- Click the menu for a list of available commands. The actions that commands execute are detailed in the list. When the desired command has been selected, click **OK** to add it to the list of commands that the link will carry out. Multiple commands can be added to the list. Click **Cancel** to cancel the process and close the dialog box.

Reset a Form

Reset a Form

This action resets data entered previously into a form. When it is selected the following dialog box will be displayed:
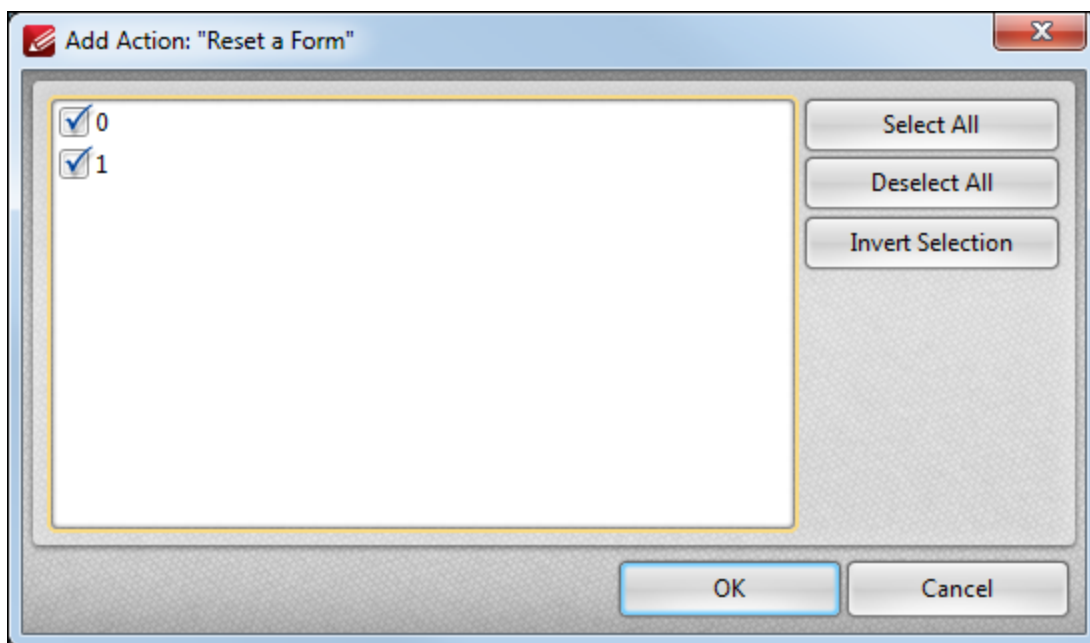
Figure 1. Reset a Form Dialog Box

- Click **Select All** to select all of the forms within the active document.
- Click **Deselect All** to deselect all of the forms within the active document.
- Click **Invert Selection** to select forms currently deselected and vice versa.

When the desired parameters have been selected, click **OK** to reset the selected forms. click **Cancel** to cancel the process and close the dialog box.

Submit a Form

Submit a Form

This action sends the specified form data to the URL entered in the associated dialog box, which opens when this action is selected:
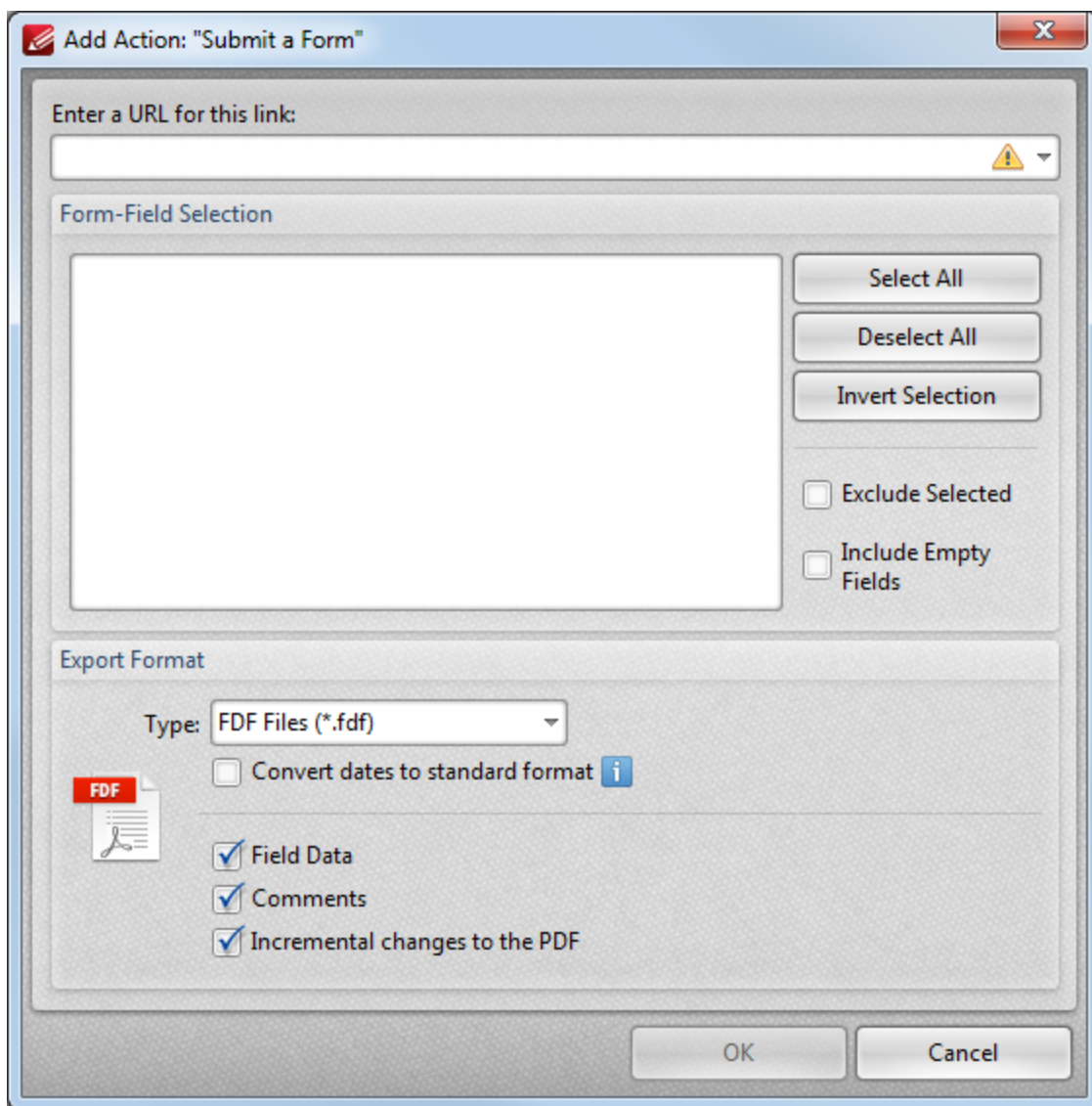
Figure 1. Submit Form Dialog Box

- Enter the desired URL for the link. The form data will be sent to the specified URL.
- Forms available for inclusion in the link are detailed in the **Form-Field Selection** pane. Select the desired forms from the list:
    - Click **Select All** to select all of the forms within the active document.
    - Click **Deselect All** to deselect all of the forms within the active document.
    - Click **Invert Selection** to select forms currently deselected and vice versa.
    - Select the **Exclude Selected** and **Include Empty Fields** boxes as desired.
- Use the **Export Format** menu to determine the format of exported data.
- Select the **Convert Dates to standard format** box as desired.
- Select the format-specific boxes as desired. The options selected here determine what is included in the sent information.
- When the desired details have been entered, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Play a Sound

Play a Sound

This action is used to play a sound when the link is activated. When it is selected, the following dialog box will be displayed:
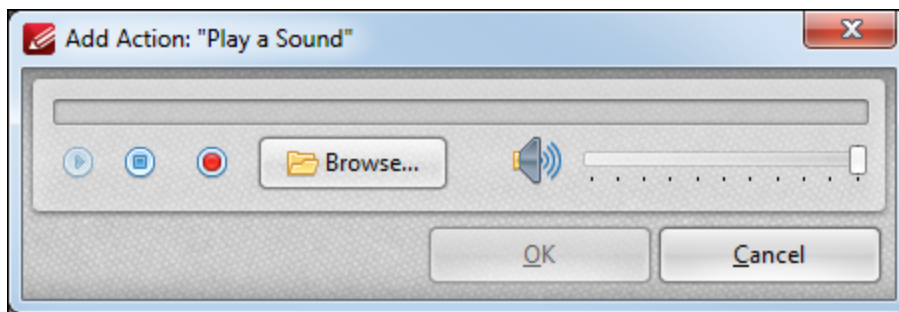
Figure 1. Play Sound Dialog Box

- Click **Browse** to select the sound that will be played.
- Alternatively, click the record icon to record a sound using the local microphone. Click the square icon to stop the recording. Click the play icon to play back the recording.
- When the desired parameters have been selected, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Show/Hide a Field

Show/Hide a Field

This action is used to show/hide fields within a document and can be used for form fields. When it is selected, the following dialog box will be displayed:
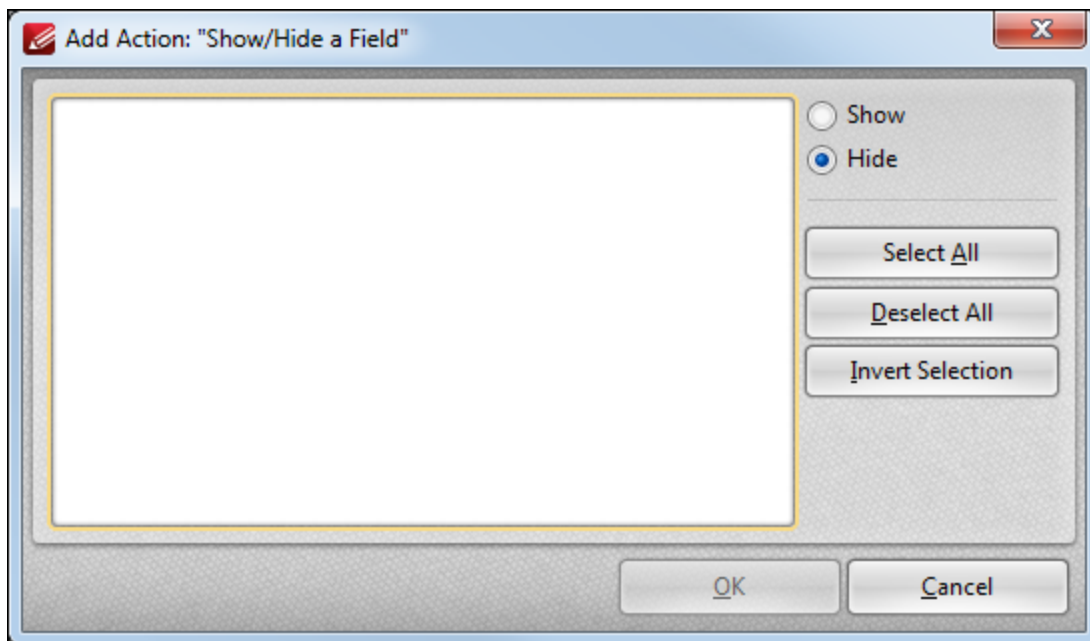
Figure 1. Show/Hide Field Dialog Box

- Click either **Show** or **Hide** for the field selected.
- Click **Select All, Deselect All** or **Invert Selection** as desired.
- When the desired parameters have been selected, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Read an Article

Read an Article

This option is not currently available. It will be included in future builds.

7.10   Advanced

Advanced

The **Advanced** options relate to bookmarks. When the **Advanced** tab is selected, there is one sub-category - the **Bookmarks** option. When this option is selected, the following options are available:
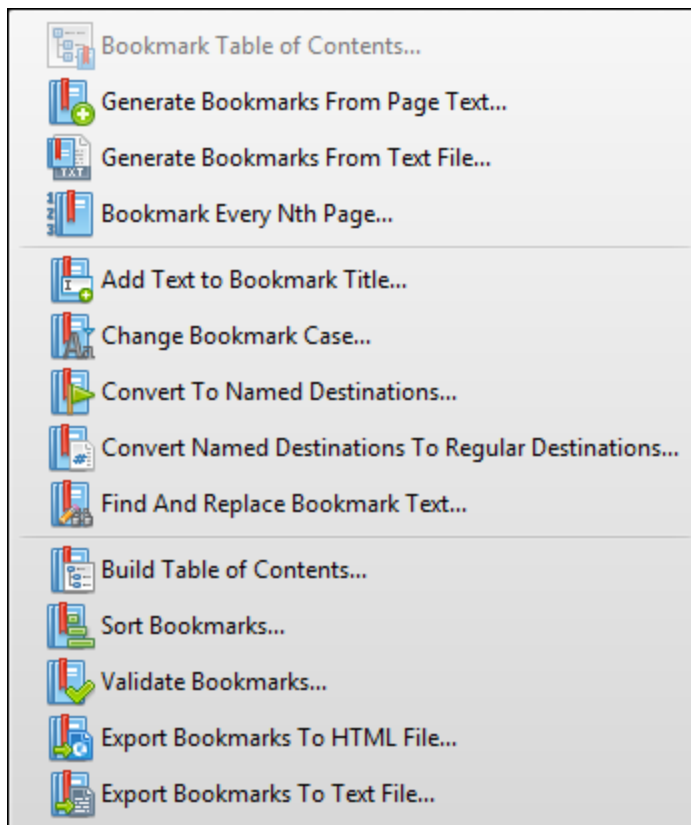
Figure 1. Bookmarks Options

Click the links below to access the relevant sections of the manual:

- **Bookmark Table of Contents** 530
- **Generate Bookmarks from Page Text** 532
- **Generate Bookmarks from Text File** 537

Bookmark Table of Contents

 Bookmark Table of Contents

This option is used to create bookmarks from an existing table of contents within the active document. The table of contents must first be selected using the **Select Text Tool** for this feature to operate. When the **Bookmark Table of Contents** option is selected the following dialog box is displayed:
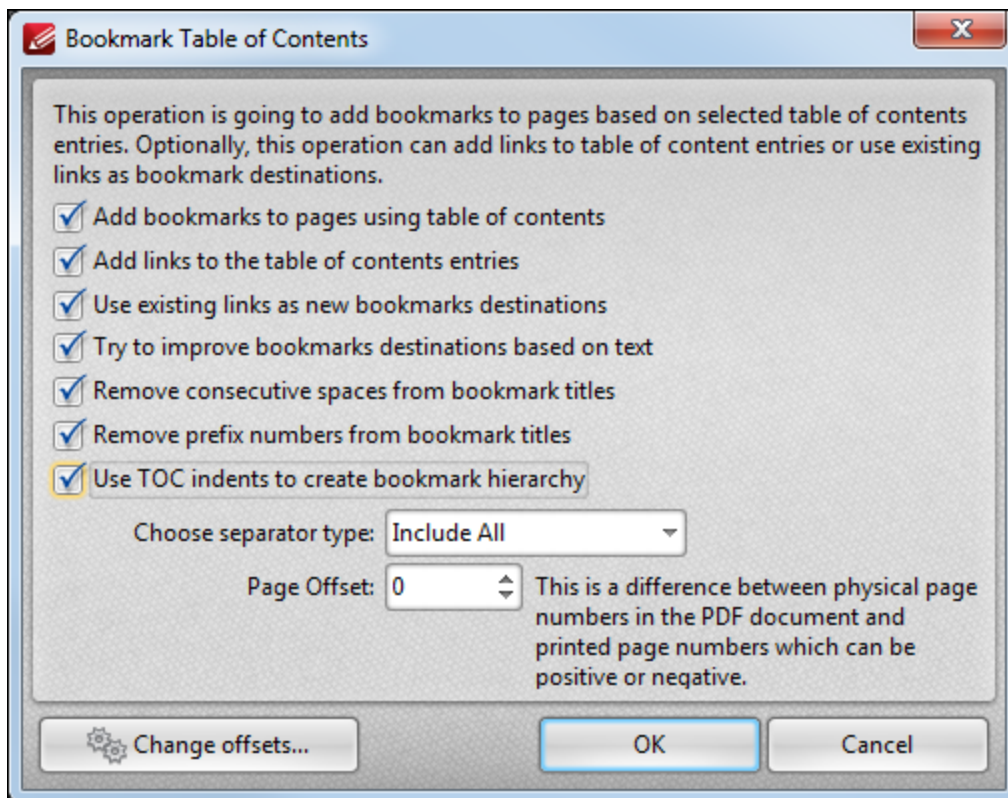
Figure 1. Bookmark Table of Contents Dialog Box

- Select the check boxes to enable/disable their associated parameters.
- Select an option from the **Choose separator type** menu.
- Enter a value as the **Page Offset** in the adjacent number box.
- Click the **Change Offsets** button to adjust the offset settings.

When the desired parameters have been selected, click **OK** to create bookmarks from the selected table of contents. Click **Cancel** to cancel the process and close the dialog box.

Generate Bookmarks From Page Text

Generate Bookmarks From Page Text

This option is used to create bookmarks using document-based text. When it is selected the following dialog box is displayed:
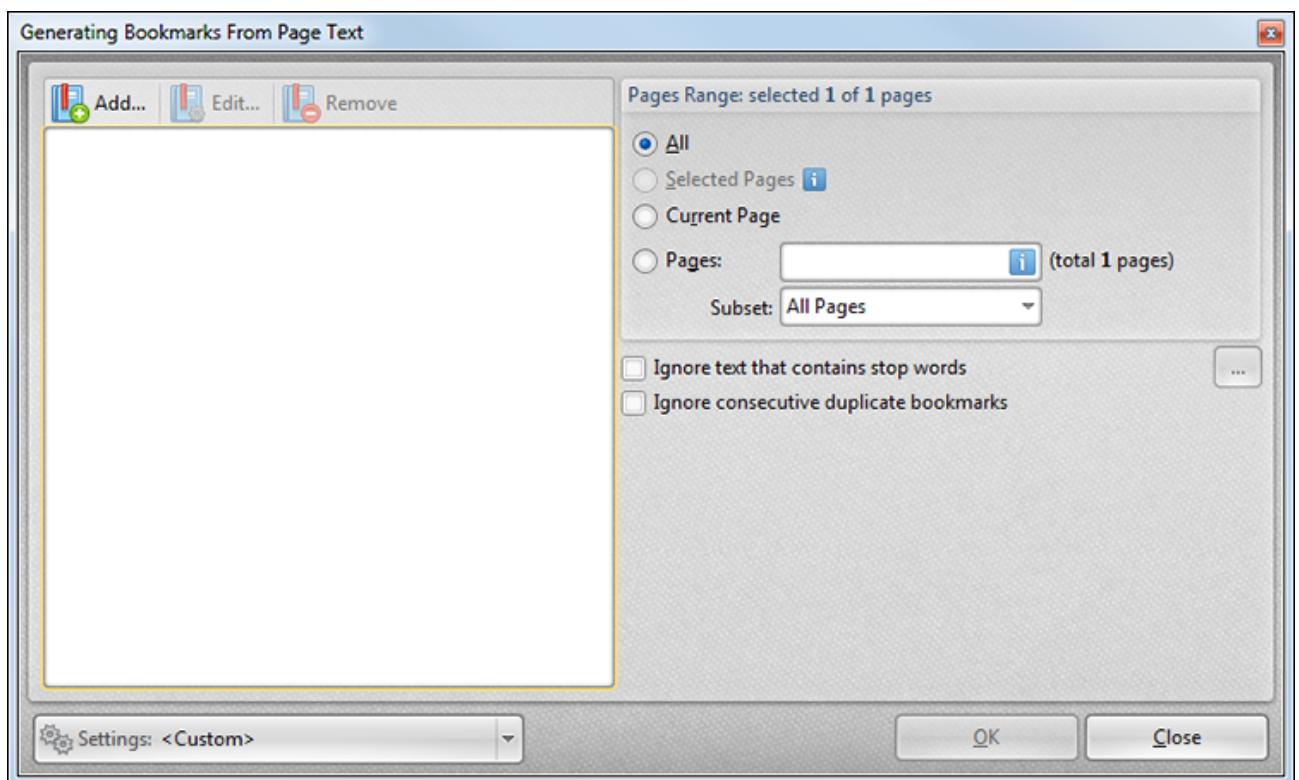
Figure 1. Generating Bookmarks From Page Text Dialog Box

- Click **Add** to add a new bookmark. The dialog box displayed in *(figure 2)* below will open.
- Click **Edit** to edit the selected bookmark.
- Click **Remove** to remove the selected bookmark
- The **Pages Range** options are as follows:
  - Select **All** to select all the pages of the document.
  - Select **Selected Pages** to select only the pages currently selected in thumbnails view.
  - Select **Current Page** to select only the current page.

- Use the **Pages** box to determine specific pages/page ranges. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Select the **Ignore text that contains stop words** box as desired. This setting designates that specific words will prevent the generation of bookmarks if they are contained within selected text. Click the ellipsis icon to view/edit the list of stop words.
- Select the **Ignore consecutive duplicate bookmarks** box to prevent the creation of consecutive identical bookmarks.
- When the desired parameters have been selected, click **OK** to generate the bookmark. Click **Cancel** to cancel the process and close the dialog box.
- Click **Settings** to manage preset configurations for bookmarks.
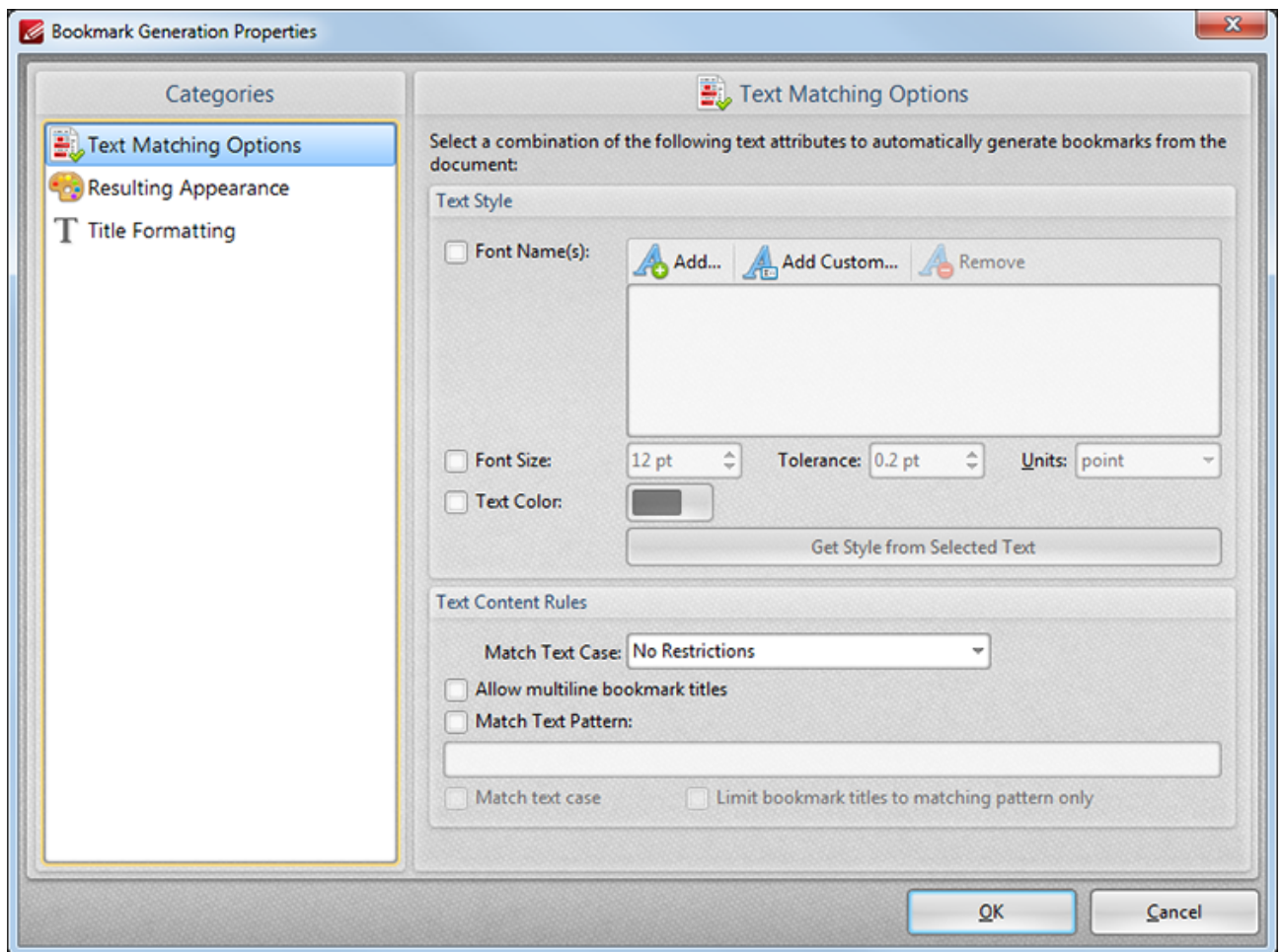
Figure 2. Bookmark Generation Properties Dialog Box

Text Matching Options

These options determine the details of the text from which the bookmark will be generated:

- Enter the parameters of the desired text in the **Text Style** section.

- Select the **Font Names** from which the text will be selected. Click **Add** to view/edit the list of supported fonts within the active document.
- Specify the **Font Size**. The value entered in the **Tolerance** number box determines the degree to which selected text can differ from the specified **Font Size** and remain included in the bookmark.
- Select the **Text Color**. Text of the color selected only will be included in the bookmark generation.
- When text is selected in the active document, click the **Get Style from Selected Text** button to update the font details according to the selected text.
- The **Text Context Rules** determine the details of the text to be used in generating bookmarks.
- The **Match Text Case** setting determines the specifics for when the software matches text to be used in the generation of bookmarks. Select an option from the menu.
- Select the **Allow multiline bookmark titles** box to allow the title of a bookmark to exceed a single line in length. This is useful in cases where it is not possible to shorten the title of bookmarks.
- Select the **Match Text Pattern** box to detail a specific sequence of words that the text within the active document must match to be included in the bookmark generation. Enter the desired text pattern into the text box.
- Select the **Match text case** box to determine that the case of the text outlined in the **Match Text Pattern** text box must match the case of the text in the active document.
- Select the **Limit bookmark titles to matching pattern only** box to determine that text that matches the specified pattern only will be included in the generation of bookmarks.
- When the desired parameters have been selected, click **OK** to update. Click **Cancel** to cancel the process and close the dialog box.

Resulting Appearance

These settings determine the appearance of bookmarks within the bookmarks pane:

- Use the **Text Color** menu to determine the color of the text used for the bookmarks.
- Use the **Text Style** menu to determine the style of the text used for bookmarks.
- Use the **Zoom** menu to determine the zoom used with bookmarks. Select **Inherit** to use the existing zoom level.
- Select the **Show expanded** box to expand all bookmarks after they are created.

Title Formatting

These settings determine the appearance of the text used in the titles of bookmarks. When they are selected the following dialog box is displayed:
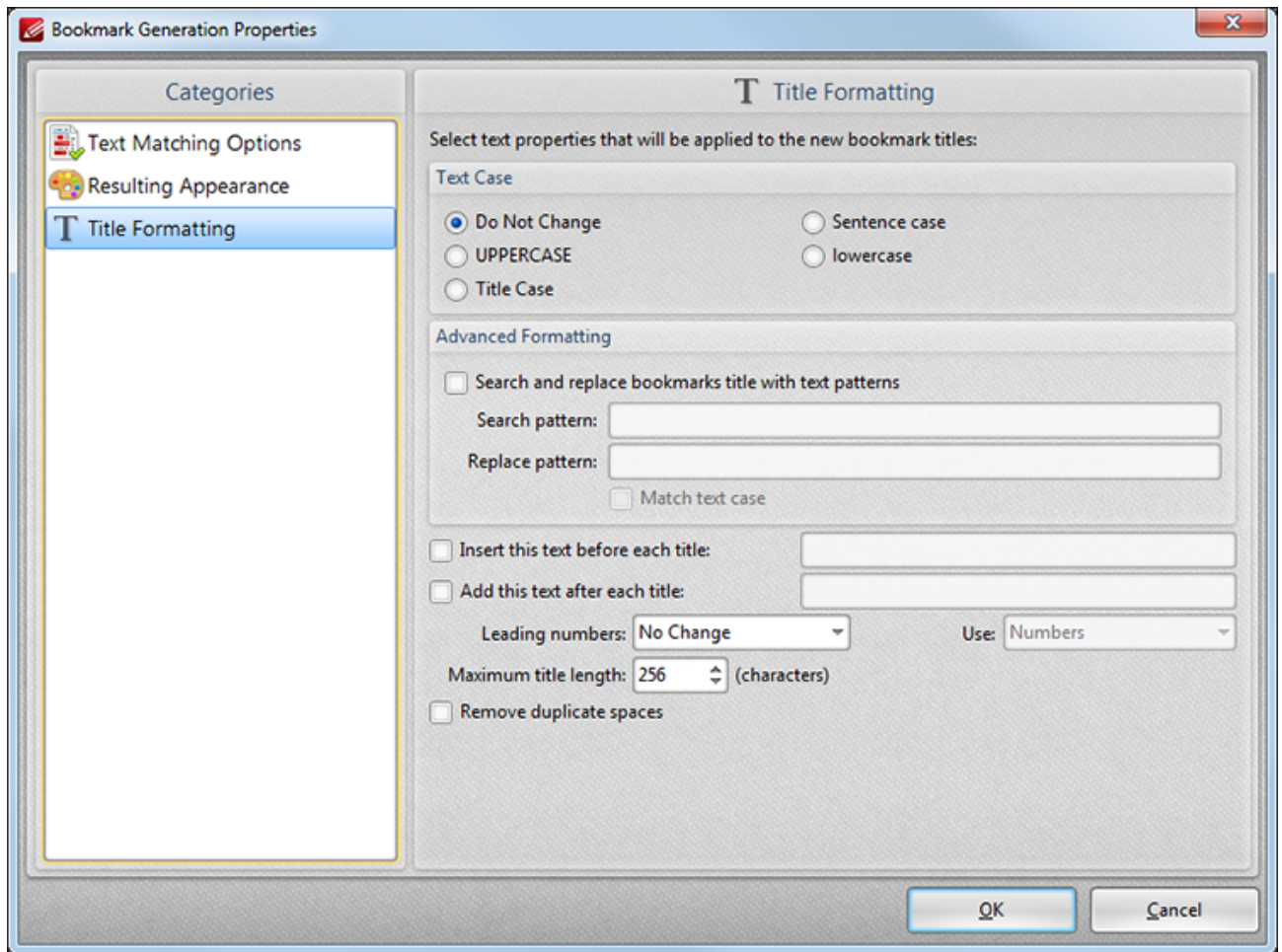
Figure 3. Bookmark Generation Properties Dialog Box

- Select an option in the **Text Case** section to determine the case of the text.
- Select the **Search and replace bookmarks title with text patterns** box as desired. The bookmark title will then match the specified text pattern.
- Use the **Search Pattern** text box to enter the desired search pattern.
- Use the **Replace Pattern** text box to enter the desired replace pattern.
- Select the **Match text case** box as desired.
- Select the **Insert this text before each title** box to prepend bookmark titles with the text entered in the adjacent box.
- Select the **Add this text after each title** box to append bookmark titles with the text entered in the adjacent box.
- Select an option from the **Leading numbers** menu to add or remove numbers to the title of the bookmark. When adding numbers to the title, select an option from the **Use** menu to determine the format of numbers added.
- Select a figure for the **Maximum title length** as desired.
- Select the **Remove duplicate spaces** box to remove instances of adjacent blank characters.
- When the desired parameters have been selected, click **OK** to update. Click **Cancel** to cancel the process and close the dialog box.

Generate Bookmarks From Text File

Generate Bookmarks From Text File

This option is used to create bookmarks using text files. When it is selected the following dialog box will be displayed:
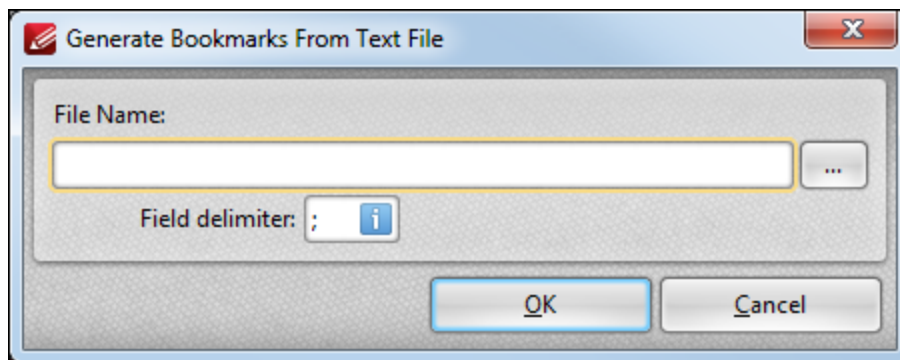
Figure 1. Generate Bookmarks From Text File Dialog Box

- Enter the name of the text file to be used in the **File Name** text box. Alternatively, click the ellipsis icon to select a file from the local computer. (Please note that the file used must be in plain text (*.txt) format).
- Use the **Field delimiter** box to determine the delimiter as required. This figure specifies the boundary between fields.
- Click **OK** to save changes and close the dialog box.
- Click **Cancel** to cancel the process and close the dialog box.

Bookmark Every N-th Page

Bookmark Every N-th Page

This option is used to create bookmarks according to their page numbers. When it is selected, the following dialog box will be displayed:
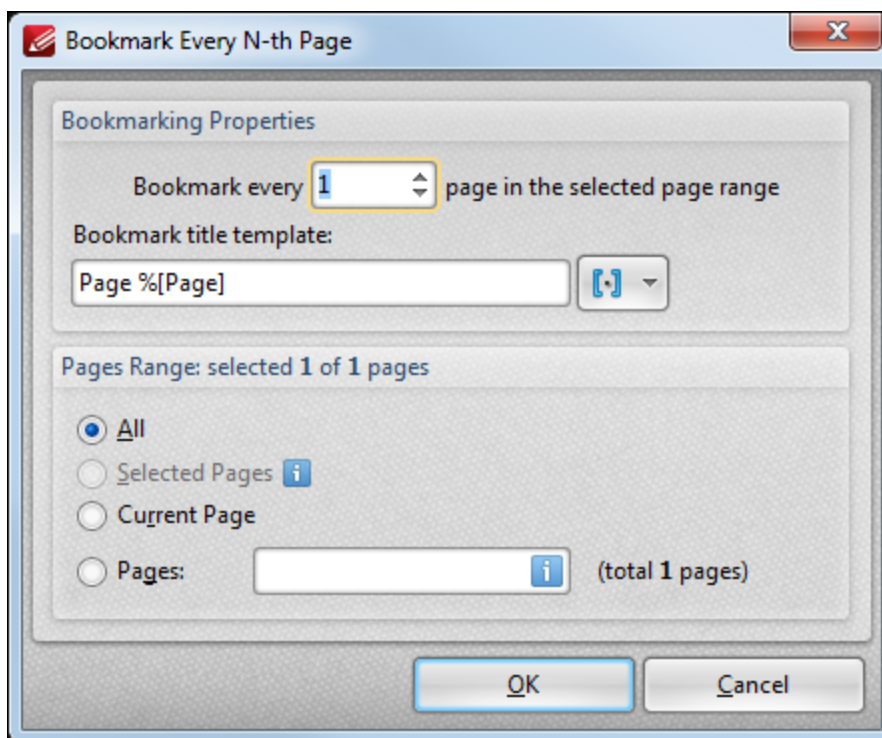
Figure 1. Bookmark Every N-th Page Dialog Box

- Enter a figure in the number box to determine the nth pages of the document from which to create bookmarks. For example, if 2 is entered then every second page of the document will become a bookmark.
- Enter a value for the **Bookmark title template**. Use the icon to add <u>macros</u> [579]. The value entered here determines the template for bookmark titles.
- The page range options are as follows:
  - Select **All** to include all pages of the document.
  - Select **Selected Pages** to include only the pages currently selected in thumbnails view.
  - Select **Current Page** to include only the current page.

- Use the **Pages** box to determine specific pages/page ranges. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired parameters have been selected, click **OK** to update. Click **Cancel** to cancel the process and close the dialog box.

Add Text to Bookmark Title

Add Text to Bookmark Title

This option is used to add text to bookmark titles. When it is selected the following dialog box is displayed:
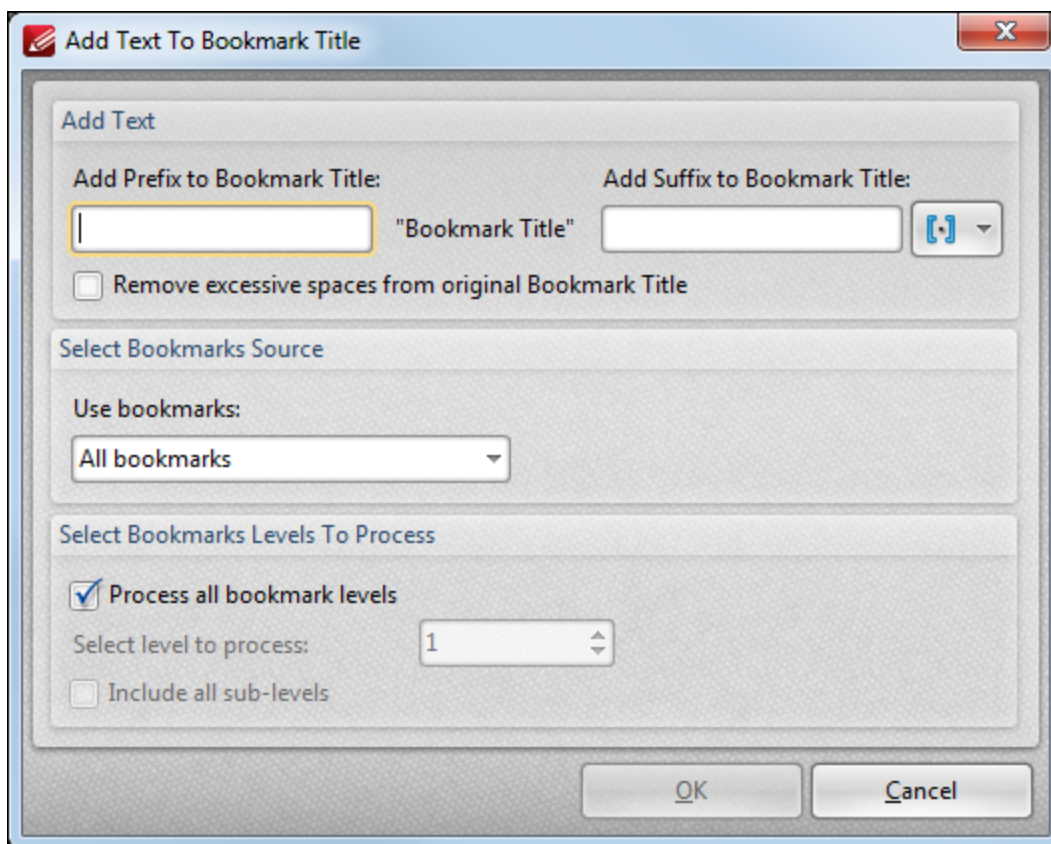
Figure 1. Add Text to Bookmark Title Dialog Box

- Use the **Add Text** boxes to add a prefix/suffix to bookmark titles. Click the icon to add macros. [579]
- Click the **Remove excessive spaces from original Bookmark Title** box to remove additional spaces from the bookmark title.
- The **Select Bookmarks Source** menu determines the location from which bookmarks are taken.

- Select the **Process all bookmark levels** box to process all levels of bookmarks. Alternatively, clear the box to select the level of bookmarks to process. The number entered in the number box determines the level of bookmarks that are processed. Alternatively, click the **Include all sub-levels** box to include all levels of the bookmark.
- When the desired details have been entered, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Change Bookmark Case

Change Bookmark Case

This option is used to edit the case of the bookmark. When it is selected the following dialog box is displayed:
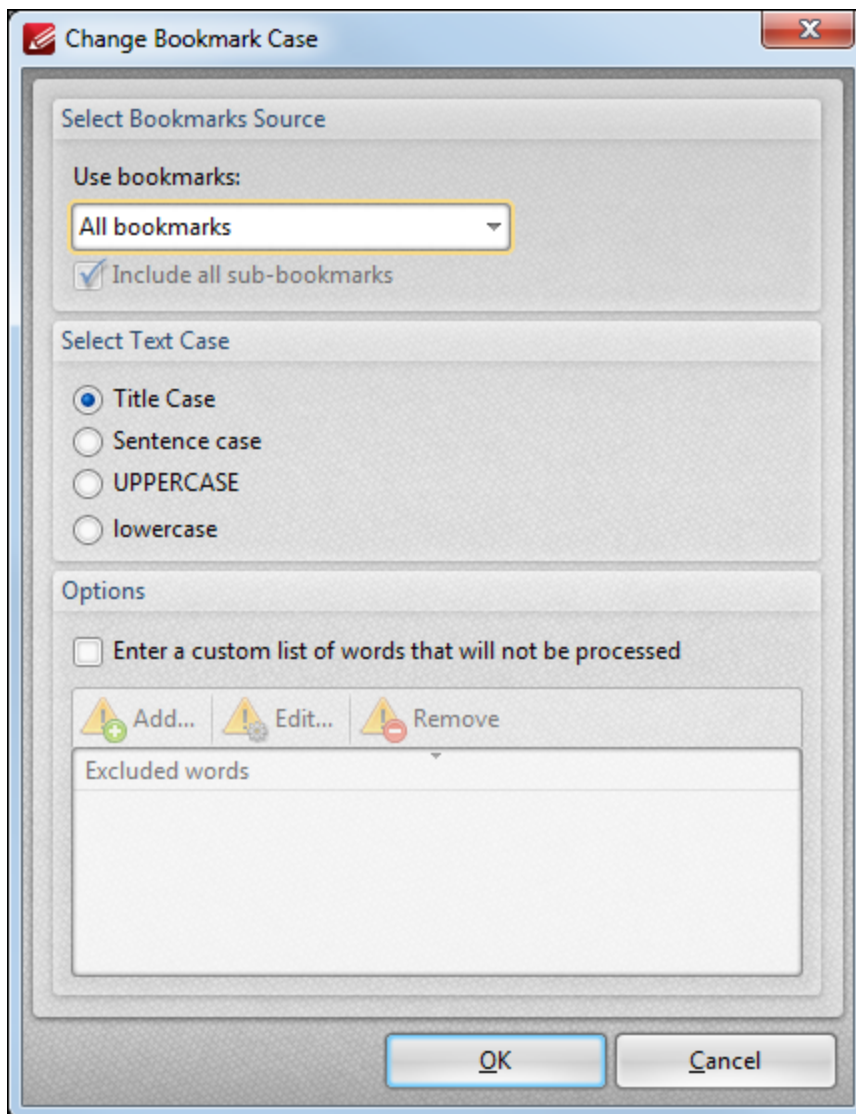
Figure 1. Change Bookmark Case Dialog Box

- Select an option from the **Use Bookmarks** menu to determine the bookmarks to which the remaining settings will apply.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks in the process.
- Select an option from the **Select Text Case** option buttons. This determines the case of the text.
- Select the **Enter a custom list of words that will not be processed** box as desired. Words included in the list will be excluded from the process. Use the **Add, Edit** and **Remove** buttons to add, edit and remove words from the list.
- When the desired details have been entered, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Convert to Named Destinations

Convert to Named Destinations

This option is used to convert specific text into a named destination for subsequent reference as detailed here. ₄₀₄ When it is selected the following dialog box is displayed:
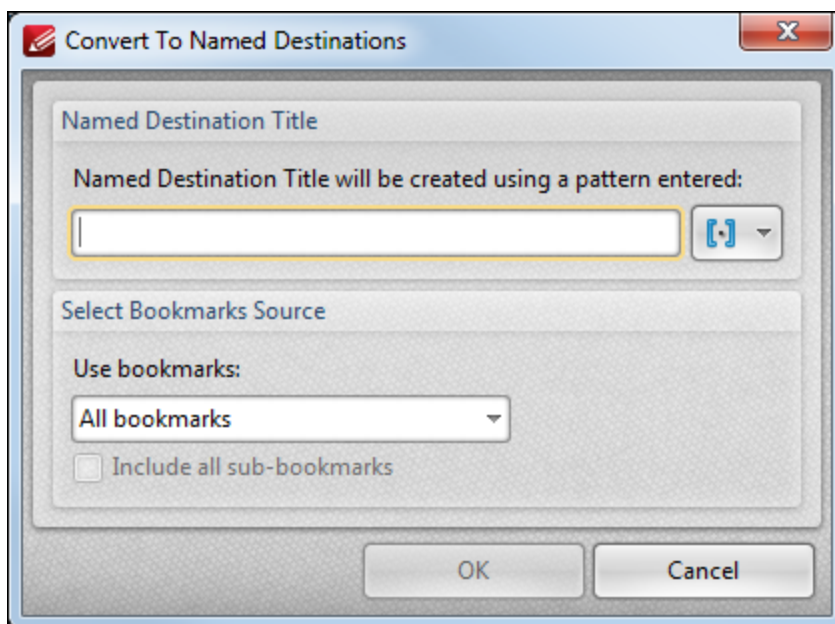
Figure 1. Convert to Named Destinations Dialog Box

- Enter the pattern of text that will convert to a named destination in the text box. It is possible to include macros ₅₇₉ at this point.
- Use the **Use Bookmarks** menu to determine the bookmarks included in the process.
- Select the **Include all sub-bookmarks** box as desired.
- When the desired details have been entered, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Convert Named Destinations to Regular Destinations

Convert Named Destinations to Regular Destinations

This option is used to convert named destinations into regular destinations. When it is selected the following dialog box is displayed:
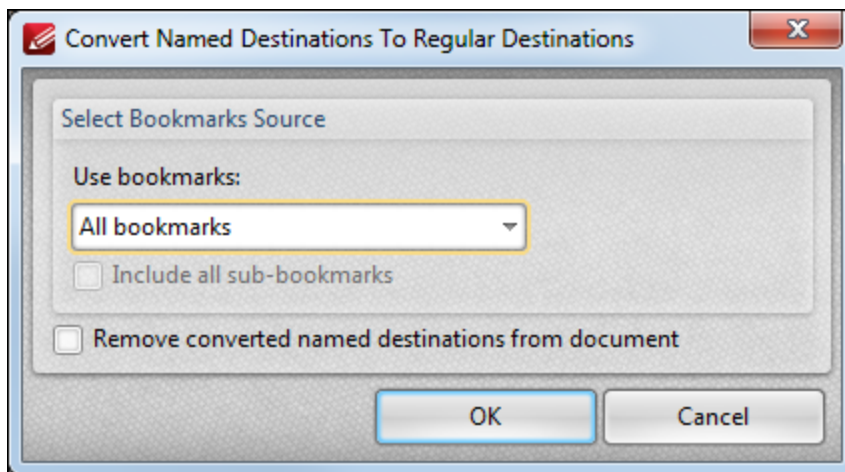
Figure 1. Convert Named Destinations To Regular Destinations Dialog Box

- Use the **Use Bookmarks** menu to determine the bookmarks included in the process.
- Select the **Include all sub-bookmarks** box as desired.
- Select the **Remove converted named destinations from document** box as desired.
- When the desired details have been entered, click **OK** to save them. Click **Cancel** to cancel the process and close the dialog box.

Find and Replace Bookmark Text

Find and Replace Bookmark Text

This option is used to locate and replace elements of text to be used as bookmarks. When it is selected the following dialog box is displayed:
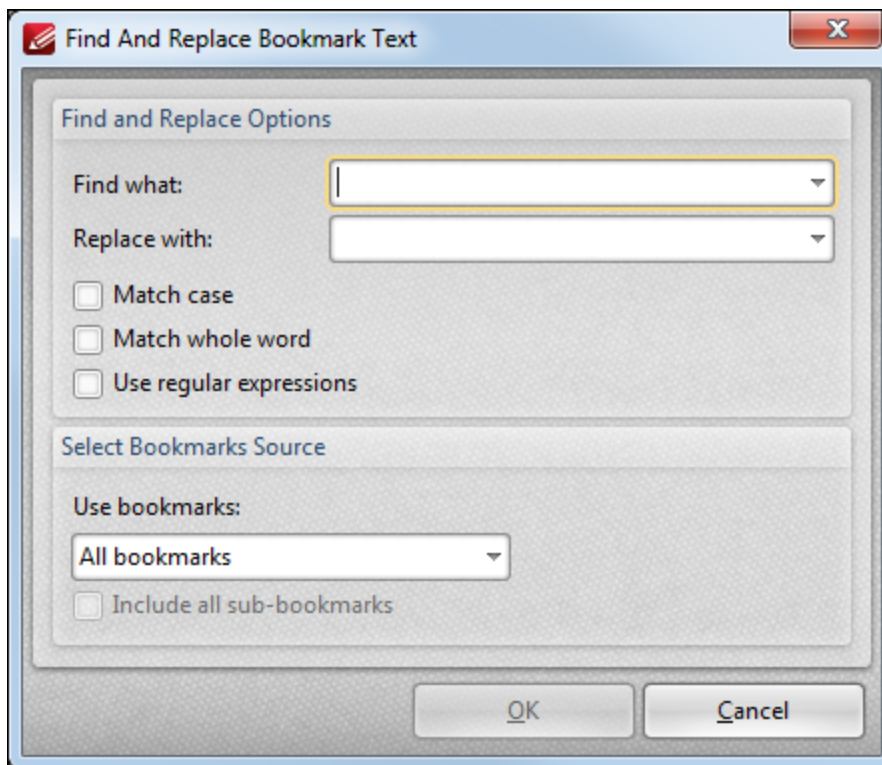
Figure 1. Find And Replace Bookmark Text Dialog Box

- Use the **Find What** menu to determine the words that will be included in the process.
- Use the **Replace with** menu to determine the words that will replace the words included in the **Find what** section.
- Select the **Match case** box to match the case of words.
- Select the **Match whole word** box to match the entire word.

- Select the **Use regular expressions** box to use regular expressions. A link will be added to the software shortly that will explain this option in more detail.
- Select an option from the **Use bookmarks** menu to determine the location from which bookmarks will be sourced.
- Select the **Include all sub-bookmarks** box as desired.
- When the desired parameters have been selected, click **OK** to save them or **Cancel** to cancel the process and close the dialog box.

Build Table of Contents

Build Table of Contents

This option is used to build a table of contents based on bookmarks. When it is selected the following dialog box will be displayed:
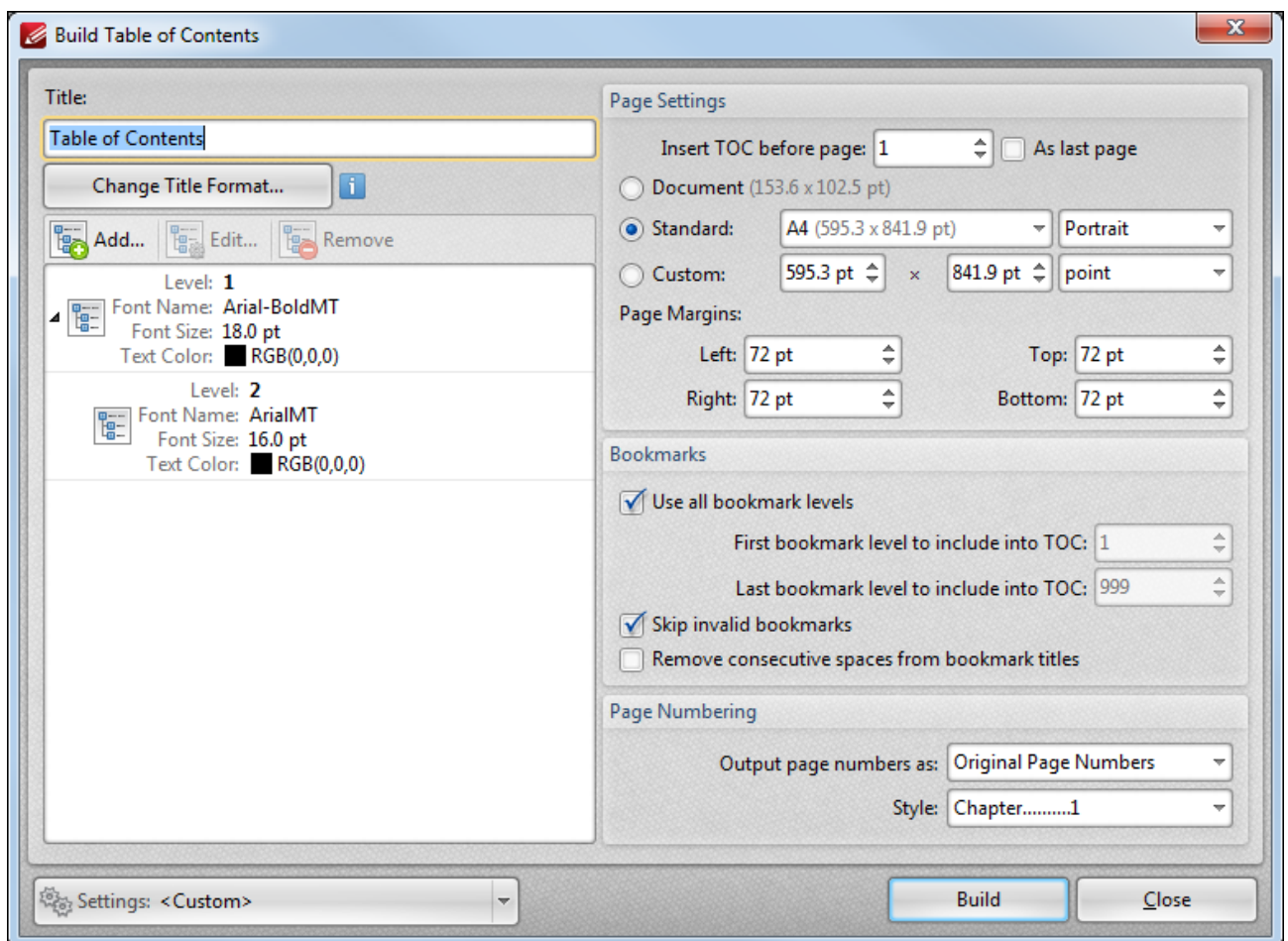
Figure 1. Build Table of Contents Dialog Box

- Use the **Title** text box to enter a title for the table of contents.
- Click the **Change Title Format** button to adjust the font parameters.
- The pane on the left displays the title formats available for use. Click **Add, Edit** and **Remove** to add, edit or remove formats.

- Use the **Insert TOC before page** number box to determine the location of the table of contents, or select the **As last page** box to locate it at the end of the document.
- Select one of the three option buttons to determine the dimensions of the table of contents:
    - **Document** is one of the standard sizes for documents.
    - The options in the **Standard** menu refer to standard sizes such as those used by the **ISO** and **ANSI.**
    - Select the **Custom** option button to enter custom dimensions.
- Use the **Page Margins** number boxes to determine the margins of the table of contents.
- Select the **Use all bookmark levels** to include all levels of bookmarks in the table of contents.
- Alternatively, use the number boxes to determine the first and last bookmark levels to be included.
- Select the **Skip invalid bookmarks** box as desired.
- Select the **Remove consecutive spaces from bookmark titles** box to rectify instances of consecutive white space.
- Use the **Output page numbers as** menu to determine the manner in which the pages of the table of contents are numbered.
- Use the **Style** menu to determine the style of the heading used for the title.
- When custom parameters have been determined, click the **Settings** menu to save them as a new profile. This menu can also be used to manage or delete existing profiles.

When the desired settings have been selected, click **Build** to create the table of contents. Click **Close** to cancel the process and close the dialog box.

Sort Bookmarks

Sort Bookmarks

This option is used to sort bookmarks. When it is selected the following dialog box is displayed:
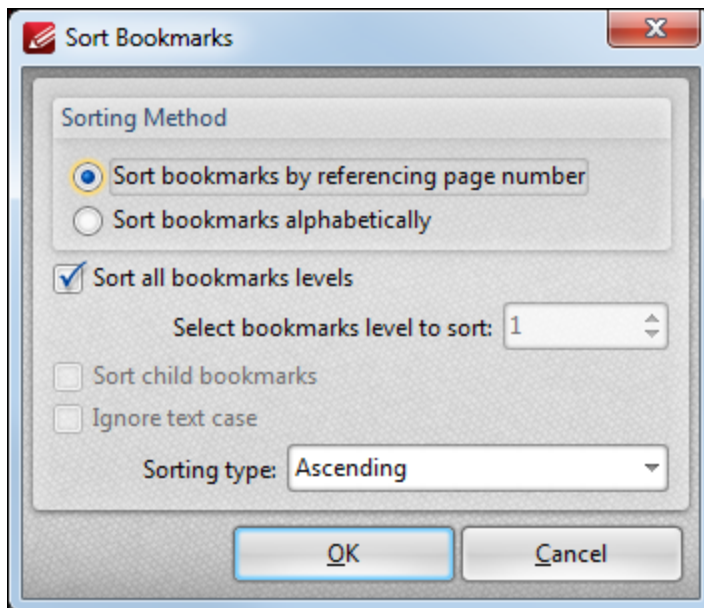
Figure 1. Sort Bookmarks Dialog Box

- Use the option buttons to determine if bookmarks are sorted according to their numerical or alphabetical element.
- Select the **Sort all bookmark levels** box as desired.
- Alternatively, use the number box to specify a bookmark level to be sorted.
- Select the **Sort child bookmarks** and/or **Ignore text case** boxes as desired.
- Use the **Sorting type** menu to select an either **Ascending** or **Descending** sorting type.
- When the desired parameters have been selected, click **OK** to sort bookmarks. Click **Cancel** to cancel the process and close the dialog box.

Validate Bookmarks

Validate Bookmarks

This option is used to verify elements within bookmarks. When it is selected the following dialog box will be displayed:
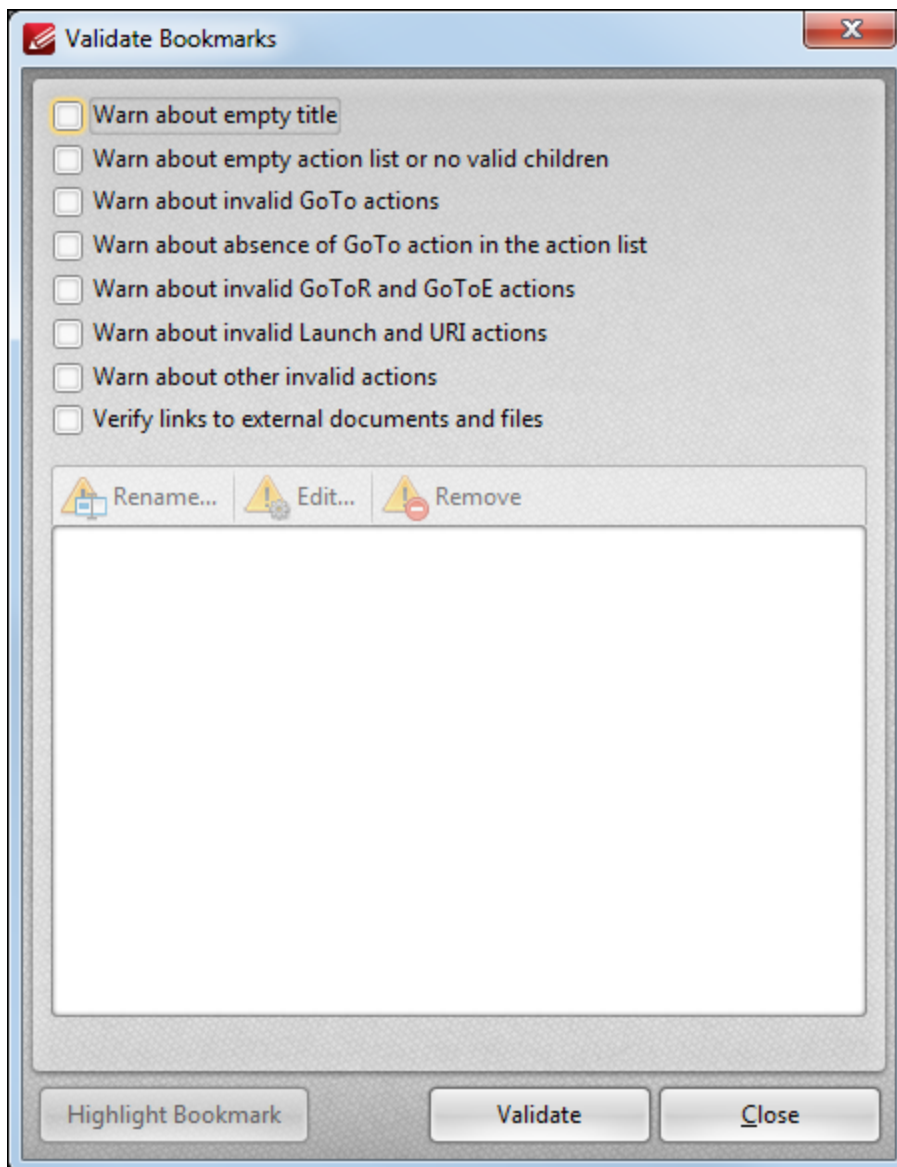
Figure 1. Validate Bookmarks Dialog Box

- Select the elements of the bookmark to be verified.
- When the desired elements have been selected, click the **Validate** button to verify that their conditions are met.
- Alternatively, click **Close** to cancel the process and close the dialog box.

Export Bookmarks to HTML File

![PDF-XChange Editor icon]**Export Bookmarks to HTML File**

This option is used to export bookmarks to HTML files, which are used as the basis of web pages. When it is selected the **Save File** dialog box will launch. Enter the desired name for the file in the **file Name** text box. Click **Save** to export the file or **Cancel** to cancel the process and close the dialog box.

Export Bookmarks to Text File

Export Bookmarks to Text File

This option is used to export bookmarks to Text Files. When it is selected the following dialog box will be displayed:
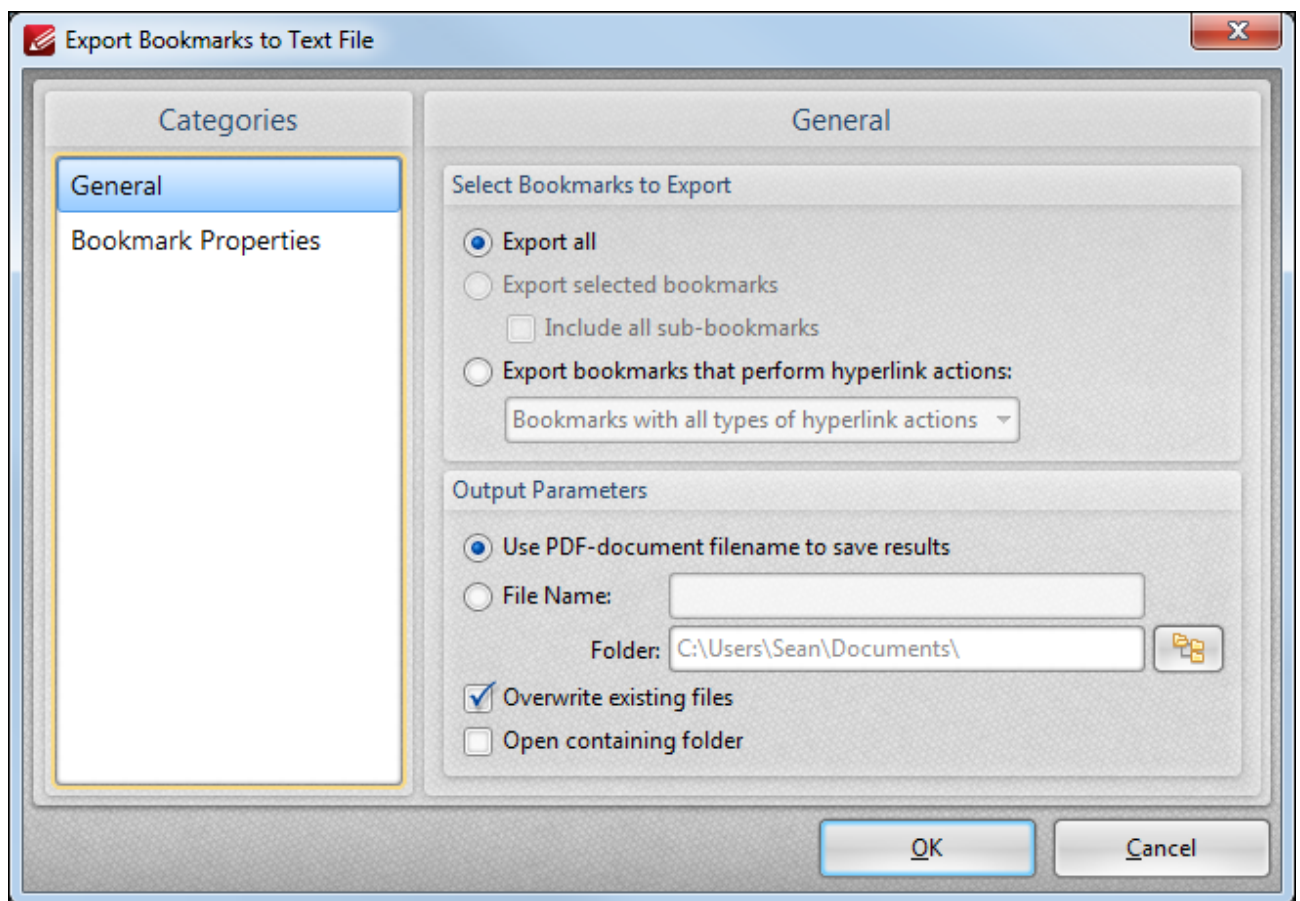
Figure 1. Export Bookmarks to Text File Dialog Box, General Tab Selected

The options in the **General** tab are as follows:

- Select the **Export all** option button to export all bookmarks.
- Select the **Export selected bookmarks** option to export only the bookmarks currently selected. Select the **Include all sub-bookmarks** box to include child bookmarks.

- Select the **Export bookmarks that perform hyperlink actions** as desired. Select the desired actions from the menu.
- Select the **Use PDF-document filename to save results** option button to save output files using the same name as the document from which they came.
- Alternatively, enter a name in the **File Name** text box. Select the folder to which the output will be saved or use the icon to select a folder on the local computer.
- Select the **Overwrite existing files** box to replace files that feature the same name as that entered in the **File Name** text box.
- Select the **Open containing folder** box to open the containing folder after the process has taken place.
- When the desired parameters have been selected, click **OK** to export bookmarks. Click **Cancel** to cancel the process and close the dialog box.

The options in the **Bookmark Properties** tab determine the properties of the bookmark that are exported when the process takes place. When it is selected the following dialog box is displayed:
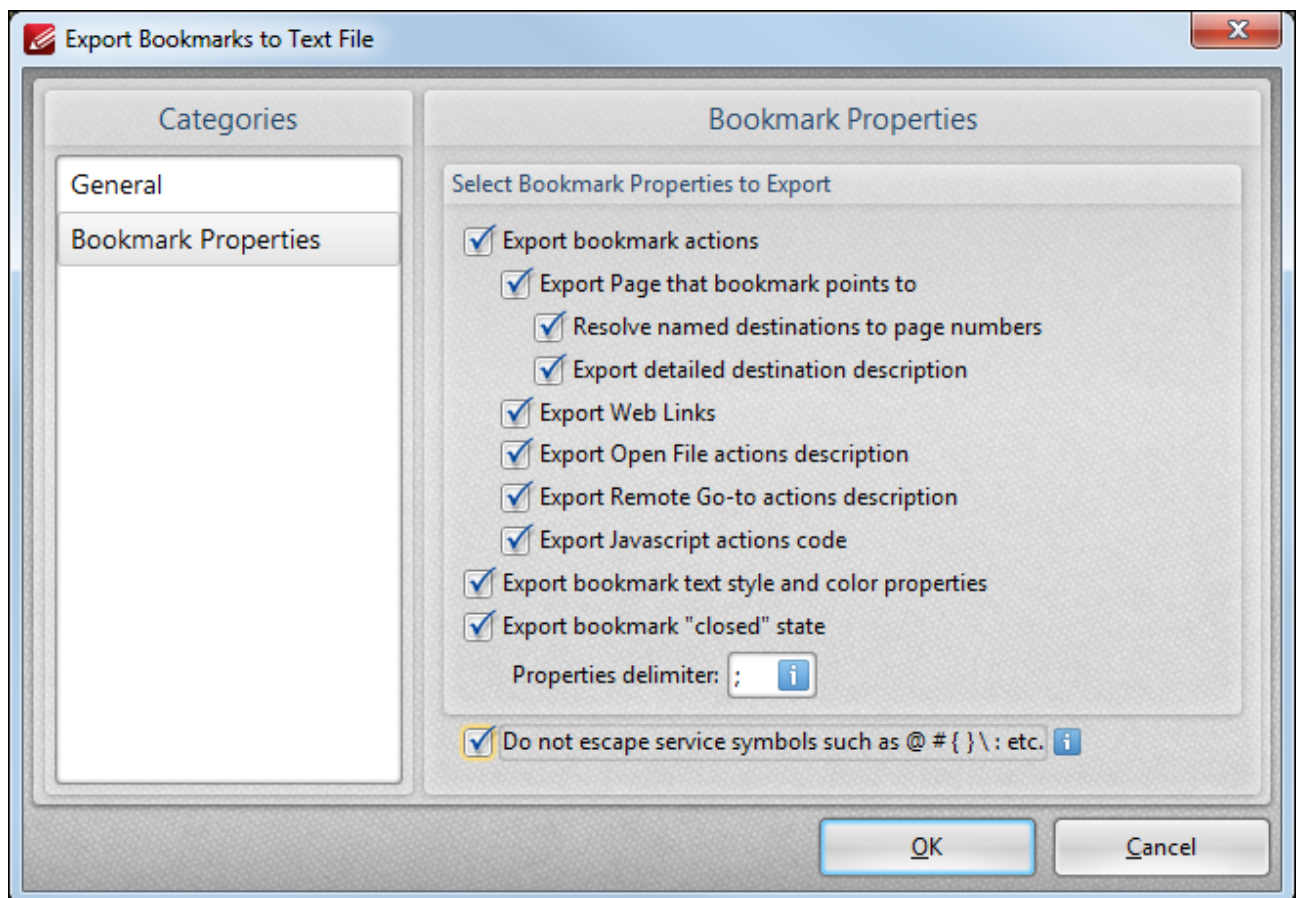
Figure 2. Export Bookmarks to Text File Dialog Box, Bookmark Properties Pane Selected

- Select the **Export bookmark actions** box to export actions associated with the selected bookmark and the properties of those actions.

- Select the **Export Page that bookmark points to** box to add the relevant page number to the bookmark's properties.
- Select the **Resolve named destinations to page numbers** box as desired. If the bookmark uses a named reference to a specific location within a document and this option is not enabled, then a named destination title will be exported instead of a page number.
- Select the **Export detailed destination description** box to export a destination with a greater level of description for the bookmark.
- Select the **Export Web Links** box as desired.
- Select the **Export Open File actions description** box to export a description of the "Open File" action to the text file. This is necessary to recreate the action subsequently.
- Select the **Export Remote Go-to actions description** box to export any paths contained within the active document that link to external files.
- Select the **Export Javascript actions code** to export any javascript within the active document.
- Select the **Export Bookmark text style and color properties** box as desired.
- Select the **Export bookmark "closed" state** box to export the bookmark in its closed state - i.e. with child bookmarks not displayed.
- Use the **Properties delimiter** box to determine the delimiter that separates the bookmark properties contained within the text file.
- Select the **Do not escape service symbols** box as desired.

When the desired settings have been selected, click **OK** to apply them. Click **Cancel** to cancel the process and close the dialog box.

7.11   SharePoint

Share Point

PDF-XChange Editor features a plugin that facilitates the manipulation and integration of PDF documents to and from a Sharepoint server. Follow the instructions detailed below to open Sharepoint files:

1. Open **PDF-XChange Editor.**

2. Move to the **File** tab.

3. Select **Open From.**

4. Select **Sharepoint.**

5. The **Open File** dialog box will be displayed.

6. Enter the URL for the Sharepoint file.

7. Click the **Navigate** button.

8. The **Authentication Required** dialog box will be displayed. Enter the Sharepoint credentials of the associated account and click **OK.**

9. The **Open File** dialog box will launch.

10. Select the desired file from the list and click **Open** or **Open with Check Out.**

7.12 Window

Window

The options in the **Window** tab determine the settings associated with the viewing window for **PDF-XChange Editor.** The following options are available:
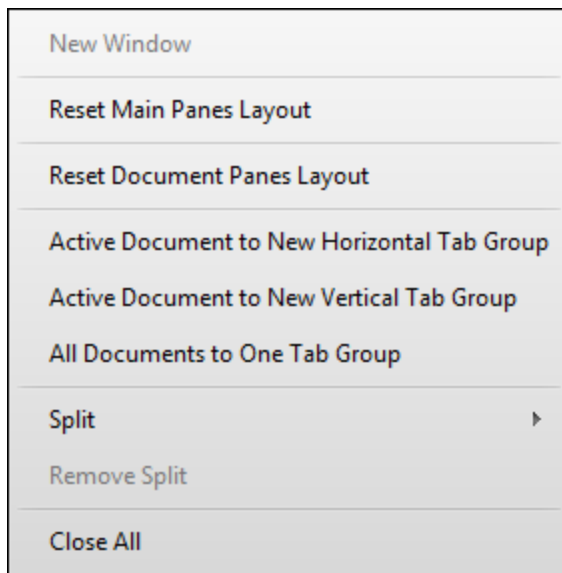
Figure 1. Window Tab Options

- The **New Window** option is not yet available. It will feature in later builds.
- The **Reset Main Panes Layout** option can be used to revert the layout of the main panes to their default setting.
- The **Reset Document Panes Layout** option can be used to revert the layout of the document panes to their default setting.
- The **Active Document Panes to New Horizontal Tab Group** option repositions and displays all active documents in a horizontal manner. At least two documents must be active for this feature to function.
- The **Active Document to New Vertical Tab Group** option repositions and displayed all active documents in a vertical manner. At least two documents must be active for this feature to function.

- The **All Documents to One Tab Group** option reverts either of the two processes outlined immediately above. One document will be displayed at a time and they will share a tab group in the main window.
- The **Split** option copies the active document and reproduces it in either a horizontal or vertical manner.
- The **Remove Split** option reverses the split process.
- The **Close All** option closes all active documents.

7.13 Help

Help

The options in the **Help** tab link to specific areas of assistance within **PDF-XChange Editor.** When it is selected the following menu is displayed:
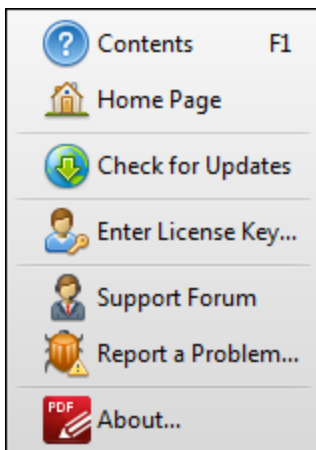
Figure 1. Help Tab

- Click **Contents** (or press **F1**) to access the contents page of the user manual for **PDF-XChange Editor.**
- Click **Home Page** to launch the home page of the **Tracker Software Products** website.
- Click **Check for Updates** to check for updates to **PDF-XChange Editor** via the **Tracker Updater.**
- Click **Enter License Key** to launch the **Registration** tab of the **Preferences** main window. It is then possible to add/update license keys. This process is explained here. 285
- Click **Support Forum** to access the **Tracker Software Products** support forums, where it is possible to post and view queries about the software.
- Click **Report a Problem** to report bugs and other issues directly to **Tracker Software Products.** The dialog box detailed in *(figure 2)* will launch.
- Click **About** to view further details about **PDF-XChange Editor.**
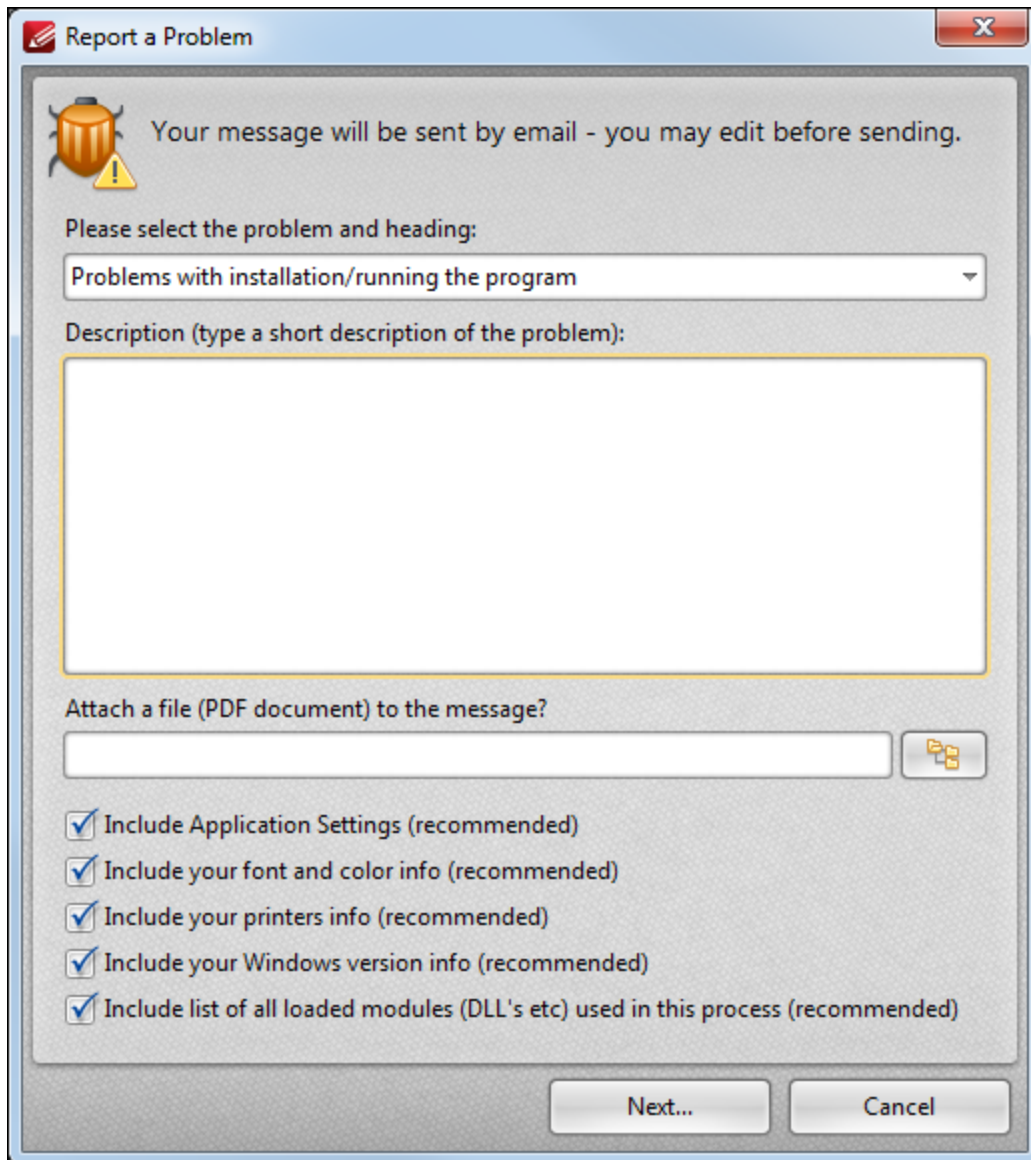
Figure 2. Report a Problem Dialog Box

- Use the menu to select the category of the difficulty that is being experienced.
- Use the **Description** text box to outline a description of the difficulty.
- Use the **Attach a file** text box to enter the name of additional files to be included with the report, such as screenshots, or click the icon to select files manually.
- Use the check boxes to determine the information that will be included with the report.
- When the desired details have been entered click **Next** to determine the manner in which the report is sent and send it.
- Alternatively, click **Cancel** to cancel the process and close the dialog box.

7.14 Appendix

Appendix

The following chapters detail additional information relating to the settings and functions within **PDF-XChange Editor.** They are outlined below:

- **Command Line Options** 563 - a list of the available command line options.
- **Keyboard Shortcuts** 576 - a table explaining available keyboard shortcuts for commands.
- **Macros** 579 - an explanation of what macros are and how they operate.
- **Page Content Editing** 607 - an explanation of how to edit images and text using this software.
- **Read Out Loud Feature** 610 - an explanation of this feature.
- **Shell Extensions** 611 - an explanation of the shell extension and ifilter that operate in conjunction with **PDF-XChange Editor.**

Command Line Options

Command Line Options

The command line options detailed in the table below are available in **PDF-XChange Editor.** Please note:

- If any values have spaces, backslahses or forwardslashes then the entire options list should be enclosed in quotation marks.
- If the **optionslistfile** contain spaces, it should be enclosed in quotation marks.
- If a profile is specified, changes will be made to that profile. If not then the changes will apply to the current printer's settings.
- These options are for the **PDFXEdit.exe** executable, the default location of which is:

  ```
  C:\Program Files\Tracker Software\PDF Editor
  ```

- Unless the path to **PDFXEdit.exe** is added to the system %path% variable, the full path to **PDFXEdit.exe** must be specified.

FORMAL SYNTAX	
SYNTAX	**DEFINITION**
\<anytext>	Any text string.
\<a>|\<b>	\<a> or \<b>.
\<filename>	Full or relative path to file. When the path contains white spaces it should be enclosed in quotation marks. For example: c:

	\MyDocuments\MyTestDocument.pdf should be "c:\My Documents\My Test Document.pdf"
<pagesrange>	Specifies the range of pages to be processed. Individual pages must be separated with a comma and page ranges must be separated with a hyphen. There is also an option to specify a specific page from which to start or finish a page range. For example: -**50 //** to specify the first fifty pages of the document, or **50- //** to specify all pages from page fifty to the end of the document.
[expression]	The expression is the optional part of the command line.
	For example if the syntax is: **/print[:[default[=yes|no]] [&showui[=yes|no]]] <filename>** then the following examples are correct: /**print "c:\example.pdf"** **/print:default "c:\example.pdf"** **/print:default&showui "c:\example.pdf"** **/print:default=yes&showui=yes "c:\example.pdf"**

<div align="center">

COMMAND LINE OPTIONS

</div>

NAME	PARAMETERS	SYNTAX	DEFINITION
/print	• **default** - if specified then default parameters will be used for printing. **PDF-XChange Editor** uses the most recently used print parameters by default. • **showui** - if specified then the	**/print[:[default[=yes|no]] [&showui[=yes|no [&printer=<printername>] [&pages=<pagesrange>]] <filename1> [<filename2> ... <filenameN>]**	This command line prints pages from specified documents. For example: **PDFXEdit.exe /print:default =yes&showui=yes&printer ="PDF-XChange Printer" "c: \example.pdf"**

	standard print dialogue will be displayed before printing. The default setting is that the application prints pages silently (without user interaction). • **printer** - is used to specify the printer to be used. The default printer will be used when this option is not enabled. • **pages** - is used to specify the page range to be printed. All pages of the active document will be printed when this option is not enabled.		
/exportsettings	• **settings** – exports all application settings. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**. • **stamps** – exports all custom stamps collections. Supported values are: **yes, no, 1, 0, true, false**. The default value is **false**. • **history** – exports the opening history of the active document. Supported values are: **yes, no, 1, 0, true, false**. The	**/exportsettings[:<parameters>] <filename>**	This command line exports settings of the application to a file on the local computer. For example: **PDFXEdit.exe /exportsettings "c:\PDFXChangeEditorSettings.xcs"** **PDFXEdit.exe /exportsettings:history=no "c:\PDFXChangeEditorSettings.xcs"** **PDFXEdit.exe /exportsettings:history=no&stamps=yes&pluginsdata=yes "c:\PDFXChangeEditorSettings.xcs"**

	default value is **true**. • **pluginsdata** – exports the advanced plugins data. Supported values are: **yes, no, 1, 0, true, false**. The default value is **false**.		
/importsettings	• **settings** – imports all application settings. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**. • **stamps** – imports all custom stamps collections. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**. • **history** – imports the opening history of the active document. Supported values are: **yes, no, 1, 0, true, false, merge**. The default value is **true**. The **merge** value can be used to combine the history of the active document with new values during import. • **pluginsdata** – import advanced plugins data. Supported values are: **yes, no, 1, 0, true, false**. The	**/importsettings[:<parameters>] <filename>**	This command line imports all settings from a file on the local computer created by the **/ExportSettings** command, or by the feature **Menu/Edit/Export Settings.** This can also be achieved via the feature **Menu/Edit/Import Settings.** For example: **PDFXEdit.exe /importsettings "c: \PDFXChangeEditorSettings .xcs"** **PDFXEdit.exe /importsettings:history=merge "c: \PDFXChangeEditorSettings .xcs"** **PDFXEdit.exe /importsettings:history=merge&stamps= yes&settings=no "c: \PDFXChangeEditorSettings .xcs"**

	default value is **true**.		
/importp	N/A	**/importp <filename>**	This command line launches the application and imports application settings from the specified file to the system registry or, in the case of portable applications, to a special settings file. The input file must be in the same format as the **/ExportP** command detailed below. For example: **PDFXEdit.exe /importp "c:\PXCEditor.MySettings.dat"**
/exportp	N/A	**/exportp <filename>**	This command line exports all the application settings to a specified file. It creates a new file with a special format that contains all the non-default options. For example: **PDFXEdit.exe /exportp "c:\PXCEditor.MySettings.Backup.dat"**
/usep	• **readonly** – if specified then the input file with the application settings will be used as "read-only" and will not be changed when the application is closed.	**/usep[:readonly[=yes|no]] <filename>**	This command line instructs the application to use the input file as the source for all settings. For example: **PDFXEdit.exe /usep:readonly "c:\PXCEditor.MySettings.dat"**

| /A | • **nameddest=<destName>** – specifies a named destination in the PDF document.
 • **page=<pageNum>** – uses an integer value to specify a numbered page in the document. The document's first page has a pageNum value of 1.
 • **comment=<commentID>** – specifies a comment on a given page in the PDF document. Use the **page** parameter before this command. For example:
 • **page=1&comment=452fde0e-fd22-457c-84aa-2cf5bed5a349**
 • **zoom=<scale>[,<left>,<top>]** – sets the zoom and scroll factors using float or integer values. For example, a scale value of 100 indicates a zoom value of 100%. Scroll values left and top are in a coordinate system where 0,0 represents the top left corner of the visible page regardless of document rotation.
 • **view=Fit\| FitH[,<top>]\| FitV[,<left>]\|FitB\|** | **/A <param1>=<value1>[&<param2>=<value2>[&...]] [=OpenParameters] <filename>** | This command line opens the document from a specified file and determines the custom view location, search words and highlight rectangles as necessary.

 For example:

 PDFXEdit.exe /A zoom=1000 "c: \example.pdf" PDFXEdit.exe /A "page=255&zoom=200&pagemode=thumbs&search=lazy dog" "c:\example.pdf" |

| | **FitBH[,<top>]\|** **FitBV[,<left>]** – sets the view of the displayed page using the keyword values defined in the PDF language specification. For more information, see the PDF Reference. Scroll values left and top are floats or integers in a coordinate system where 0,0 represents the top left corner of the visible page, regardless of document rotation. Use the **page** parameter before this command.
• **viewrect=<left>,<top>,<width>,<height>** – sets the view rectangle using float or integer values in a coordinate system where 0,0 represents the top left corner of the visible page, regardless of document rotation. Use the **page** parameter before this command.
• **pagemode=<bookmarks\|thumbs\|none>** – displays bookmarks or thumbnails. The default setting is **none.**
• **scrollbar=1\|0** – turns scrollbars on or off. | | |

- **search=<wordList>** – opens the **Search** panel and performs a search for the words in the specified word list. All matching words are highlighted in the document. The words list must be enclosed in quotation marks and separated by spaces. It is only possible to search for single words. For example: **search="sample search words"** will locate and highlight the words sample, search and words. When searching for multiple terms they must be adjacent in the content, i.e. separated by only white space/simple punctuation, or they will not be identified.
- **highlight=<left>, <right>,<top>,<bottom>** – highlights a specified rectangle on the displayed page. Use the **page** parameter before it. The rectangle values are integers in a coordinate system where 0,0 represents the top left corner of the visible page,

	regardless of document rotation. • **fullscreen[=yes|no]** – when enabled, the document will open in full screen mode. • **password=<password>** – specifies the password string to open silently a password-protected document. • **usept[=yes|no]** – when specified, all values for positioning are absolute and measured in points (1/72 inch).		
/open	The parameters for this command are the same as those of the **/A** command, which is detailed above.	**/open[:<param1>=<value1> [&<param2>=<value2>...]] <filename1> [<filename2> ... <filenameN>]**	This command opens documents from a specified file and sets the custom view point, search words and highlight rectangles as necessary.
/close	• **mode=ask** – if the document has been edited then the software will prompt the user about saving changes before it closes. This is the default mode. • **mode=discard** – closes the document silently, i.e. without prompting the user about saving changes.	**/close[:[mode=]save| discard|ask]**	This command closes open documents according to the specified source file name. For example: **PDFXEdit.exe /close "c:\example.pdf"** **PDFXEdit.exe /close:mode= save "c:\example.pdf"** **PDFXEdit.exe /close:discard "c:\example.pdf"**

	• **mode=save** – if the document has been edited then the software saves changes silently before closing.		
/addlang	• **mode=ask** – asks user about installing mode: "for this user only" or "for all users on this machine". This is default mode. • **mode=user** – installs new UI-languages silently, for current user only. • **mode=all** – installs new UI-languages silently, for all users on target machine.	/addlang[:[mode=]ask|user|all]] <filename>	This command installs new UI-languages from a special UI-languages pack. The UI-languages pack is a zip-archive that contains one or more *.xcl files.
/runjs	• **log=yes|no** – if specified without a value, or the value is **yes,** then the application creates a log when this command is executed. The log file **_RunJSLog.txt** will be added to the program folder on the local computer. • **<scriptfilename>** – specifies the full path to the text file that contains the JavaScript.	/runjs[:log[=yes|no]] <scriptfilename> [<filename1> ... <filenameN>]	This command launches JavaScript. For example: The following command line adds a 'Draft' stamp to all pages in the active document: **PDFXEdit.exe /runjs "c: \AddDraftStampToAllPages .txt" "c:\example.pdf"**

Please note that parameters are case sensitive.

Command Line Examples

(Take out the examples in the tables once these are written)

Crop Margins

Crop Margins

PDF documents feature up to five boxes that determine their content and appearance. They are the Media Box, Crop Box, Bleed Box, Trim Box and Art Box. **PDF-XChange Editor** uses four of these boxes to determine customizable settings:

Crop Box

The Crop Box defines the region to which page contents are clipped when displayed or printed. Programs use the dimensions of this box for screen display and printing. Unlike the other boxes, the Crop Box has no defined meaning in terms of physical page geometry or intended use - it merely imposes clipping on page contents. However, in the absence of additional information (such as imposition instructions specified in a JDF or PJTF job ticket) the Crop Box determines how the page contents will be positioned on the output medium.

Bleed Box

The Bleed Box defines the region to which the contents of the page shall be clipped when output in a production environment. This may include the "bleed area" needed to accommodate the physical limitations of cutting, folding and trimming equipment. Usually the Bleed Box is three to five millimeters larger than the Trim Box. When a page is printed it may include printing marks that fall outside the bleed box. The default value for the bleed box the page's crop box.

Trim Box

The Trim Box defines the intended dimensions of the finished page after trimming has taken place. As opposed to the Crop Box, the Trim Box is very important because it defines the actual page size. Programs use the Trim Box as the basis for positioning pages on a press sheet. The default value for the Trim Box is the same as that of the Crop Box.

Art Box

The Art Box defines the extent of the page's meaningful content (including potential white space) as intended by the page's creator. I.e. it defines regions that are of special interest. Programs do not generally use the Art Box. The default value for the Art Box is the same as that of the Crop Box.

Keyboard Shortcuts

Keyboard Shortcuts

PDF-XChange Editor supports a number of keyboard shortcuts, which can be used to activate commands. Available shortcuts are detailed in the table below:

COMMAND	KEYBOARD SHORTCUT
Actual Size	Ctrl+0
Bookmarks	Ctrl+B
Bookmark Current View	Ctrl+Shift+B
Check Spelling	F7
Clear	Delete
Clockwise (CW)	Ctrl+Shift+Num
Close	Ctrl+W
Comments	Ctrl+M
Contents	F1
Copy	Ctrl+C
Counterclockwise (CCW)	Ctrl+Shift+Num
Crop Pages	Ctrl+Shift+T
Cut	Ctrl+X
Delete	Delete
Delete Pages	Ctrl+Shift+D
Document Properties	Ctrl+D
Fields	Ctrl+I
Find	Ctrl+F
Find Next	F3
Find Previous	Shift+F3

First Page	Home
Fit Page	Ctrl+1
Fit Width	Ctrl+2
Full Screen	F11
Last Page	End
Layers	Ctrl+L
Next Page	Right
Next View	Alt+Right
Open	Ctrl+O
Page	Ctrl+Shift+N
Page Thumbnails	Ctrl+T
Paste	Ctrl+V
Preferences	Ctrl+K
Previous Page	Left
Previous View	Alt+Left
Print	Ctrl+P
Properties Toolbar	Ctrl+E
Redo	Ctrl+Y
Rotate Pages	Ctrl+Shift+R
Save	Ctrl+S
Save As	Ctrl+Shift+S
Search Selected Text	Ctrl+Alt+F
Select All	Ctrl+A
Select Entire Page	Ctrl+A
Show/Hide Menu Bar	F9
Show/Hide Text Formatting Toolbar	Ctrl+E
Show/Hide Toolbar	F8
Undo	Ctrl+Z
Zoom In	Ctrl+Num+
Zoom Out	Ctrl+Num-
Zoom To	Ctrl+Shift+M

<u>Underlined</u> letters above are the **<Alt Hotkeys>** for commands when they are opened in a menu. These can be created and edited as follows:

1. Click the **View** tab in the main window.

2. Click **Toolbars.**

3. Click **Customize Toolbars.**

4. In the **Customize Toolbars** dialog box, click the **Commands** tab.

5. Select the desired option from the **Categories** menu.

6. Select the desired option from the list of associated **Commands.**

7. Click **Properties.**

8. In the **Shortcut** section, enter the desired shortcut keys in the **Keys** section.

See <u>here</u> 393 for instructions on how to customize toolbars.

Macros

Macros

Macros are used in several of the tools and actions of **PDF-XChange Editor.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to a corresponding output sequence. This means that complicated components of the output process can be reduced in the input process, making the work involved both less intensive and less error-prone.

When macros are available for use the icon is visible next to the save file dialog box. Click the icon and select the macro from the list to add it to the file name.

The macros available in **PDF-XChange Editor** are used predominantly when saving stamps, watermarks and other documents. The macro format is:

%[<Macro Name>] or, when it is customizable: **%[<Macro Name>:<Parameter>]**. The **<Parameter>** feature is optional. All macros are detailed below. Unless otherwise specified, macros add the same details as the name of the macro name to the file name:

Macros

- **Document Title**
- **Document Index**
- **Document Info,** which has the further options**:**
  - **Title**
  - **Author**
  - **Subject**
  - **Keywords**
  - **Creator**
  - **Producer**
  - **Creation Date**
  - **Modification Date**
- **Page Number**
- **Number of Pages**

- **File Name**
- **Folder Name**
- **Date**
- **Year**
- **Month**
- **Day**
- **Time**
- **Hour**
- **Minute**
- **Seconds**
- **Computer Name**
- **User Name**
- **Environment Variable,** which has multiple options relating to the **environment variables** of the file.
- **Auto Number**
- **Application Version**

See **here** for a technical explanation of how macros function.

It's important to take care when using macros. Certain symbols are not permitted in document names. When they are added using macros, they will be changed or removed:

" ***** " and " **?** " will be removed.
" **:**" will be replaced with "**-**".
"**/** ", " **** " , " **"** ", " **<** ", " **>** " and " **|** " will be replaced with "_".

For example, when using the **Extract Pages** feature to extract pages from documents, if "**E:**" is entered as the **Folder Name** with the string **%[Env:HOMEDRIVE]%[Env:HOMEPATH]** as the **File Name**, where **HOMEDRIVE** is "**C:**" and **HOMEPATH** is "**\User\JohnDoe**", then the new document will feature the filepath and name: "**E:\C-\User\JohnDoe.pdf**".

Document Title

Document Title

The **Document Title** macro uses the name **DocTitle** and represents the existing document title. This value can be specified in the document's <u>initial view.</u> [247] This macro can be used in conjunction with PDF documents only and uses one of the following values:

- *File Name* without extension (if the file name is determined using the **Show in Title** option available in the Window Options section of the <u>initial view</u> [247] settings).
- *Document Title* from the Document Title field in the Description tab of the <u>Document Properties</u> [243] dialog box.
- *File Name* without extension if the field **Document Title** in **Description Info** is empty.

The syntax for this macro is **%[DocTitle]**

For example:

- The file name is "articles.pdf".
- The document title is "ACDSee PDF Image.".
- The **Show in Title** field is set as 1) Document Title; 2) File Name.

A watermark created subsequently using the **DocTitle** macro will produce: 1) "ACDSee PDF Image."; 2) "articles".

Document Index

Document Index

The **Document Index** macro uses the name **DocNumber** and displays the index value of a file within a group of input/output files. It is useful when adding/extracting several files to/from a PDF document.

The syntax for this macro is **%[DocNumber: <Parameter>]**

The parameter must be a positive integer and indicates the minimum amount of digits for the page number. For example, if the <parameter> is entered as "4" the indexes will be "0001, 0002, 0003" etc.

This macro can be used in the **Image Labels** option of the **Images to PDF** dialog box, which is located here. ²²⁵ When it is open it appears as below:
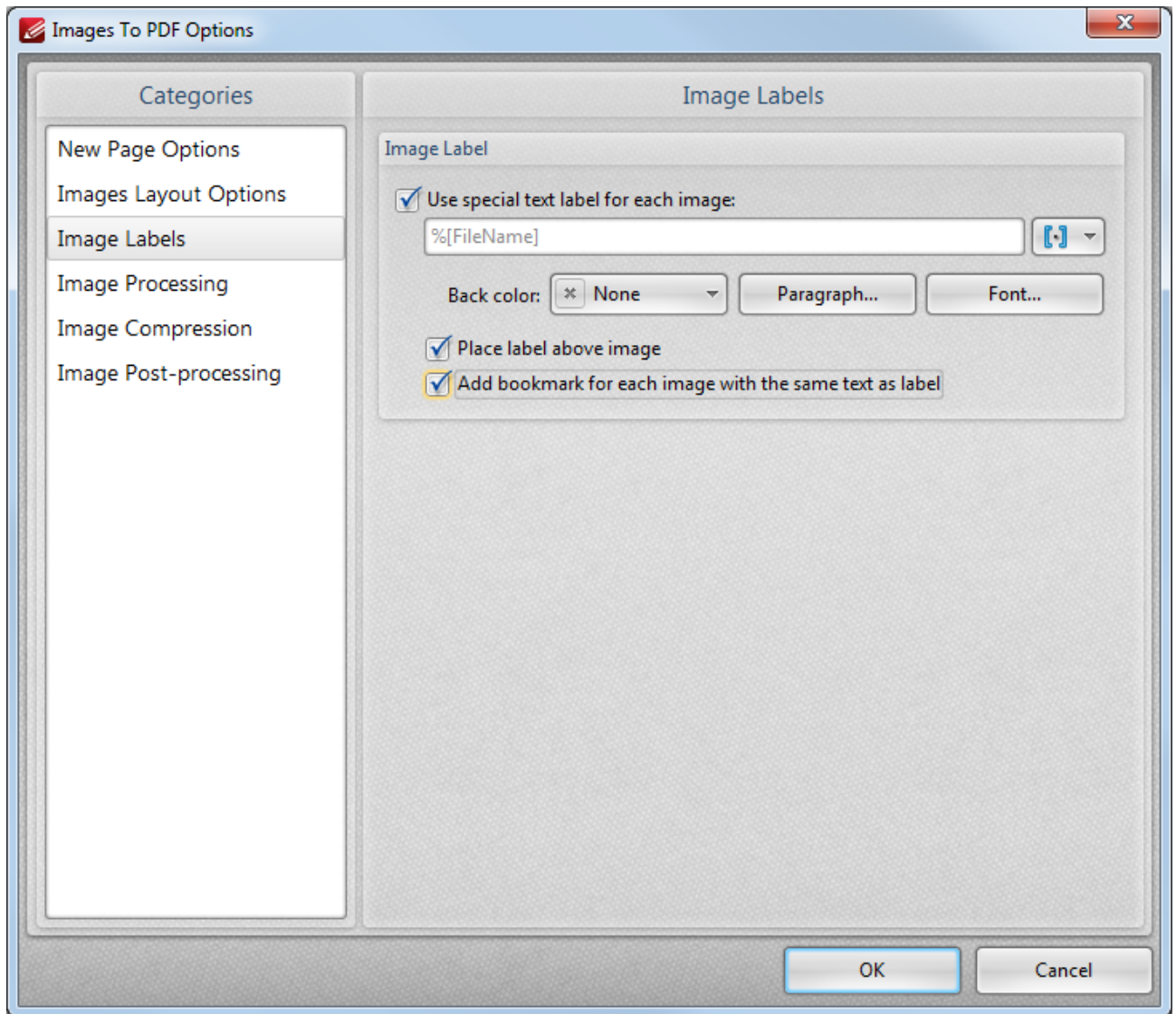
Figure 1. Images to PDF Options Dialog Box

- Select the **Use special text label for each image** box to enable the use of macros for this option.
- Use the **Back color, Paragraph** and **Font** buttons to set these parameters of the label.
- Select the remaining two boxes as desired.

For example:

- The macro "**%[DocNumber: <4>]**" is entered in the text box.
- When the new document is created, the labels "0001, 0002, 0003" etc will appear according to the parameters specified in the dialog box displayed in *(figure 1).*

Document Info

Document Info

The **Document Info** macro uses the name **DocInfo** and retrieves information about the document from the document's properties. It can be used with PDF documents only.

The syntax for this macro is **%[DocInfo:<Parameter>]**

Available parameters are detailed below:

- **Title** retrieves information from the **Document Title** field.
- **Author** retrieves information from the **Author** field.
- **Subject** retrieves information from the **Subject** field.
- **Keywords** retrieves information from the **Keywords** field.
- **Creator** retrieves information from the **Creator** field.
- **Producer** retrieves information from the **Keywords** field.
- **CreationDate** references the date when the document was created.
- **ModeDate** references the date when the document was modified.
- It is also possible to enter custom parameters. For example, entering the macro **%[DocInfo:Trapped]** will display the current setting for the "trapped" option specified here. 248 Additionally, if parameters have been specified using the javaScript console and custom names have been used to replace the standard names, then the custom names can be used as parameters for this macro.

Page Number

Page Number

The **Page Number** macro uses the name **Page** and determines the format of page numbering. It can be used in any operation that requires page numbering - for example when extracting pages or adding images.

The syntax for this macro is **%[Page:<Parameter>]**

Available parameters are detailed below:

- **r** sets the page numbering as lower-case roman numerals: "**i, ii, iii, iv, v**" etc.
- **R** sets the page numbering as upper-case roman numerals: "**I, II, III, IV, V**" etc.
- **L** sets the page numbering as the page labels, if the page labels are already specified, or page numbers if page labels are not already specified.
- **<integer>** sets the minimum amount of digits when the page number is displayed. For example if "4" is specified then the page numbering will start at "**0001**".

File Name

File Name

The **File Name** macro uses the name **FileName** and displays the file name independently of its extension, for example in the **Extract Pages** operation, or with its extension, for example in the **Add Watermarks** operation.

The syntax for this macro is **%[FileName>]**

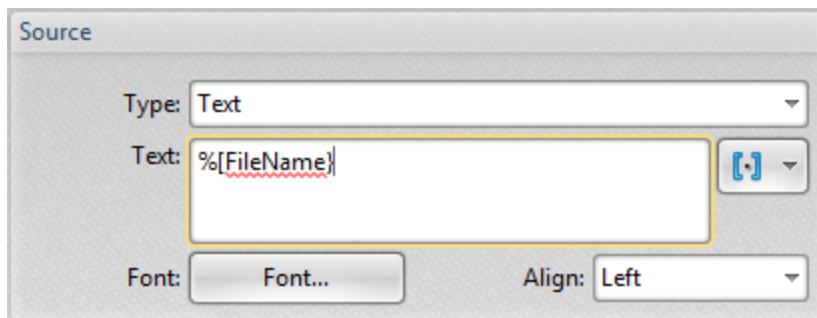For example, when using the **Add Watermark** option, the following options are available:

Figure 1. Add Watermark Dialog Box, Source Options

- Instead of entering custom text to be used as the watermark text, entering the %FileName macro will result in the file name being used as the text for the watermark.

Folder Name

Folder Name

The **Folder Name** macro uses the name **FolderName** and returns the path of the folder that contains the associated PDF file. When a local file is being used the folder name ends with a backslash: "\".

The syntax for this macro is **%[FolderName>]**

For example, when using the **Add Watermark** option, the following options are available:
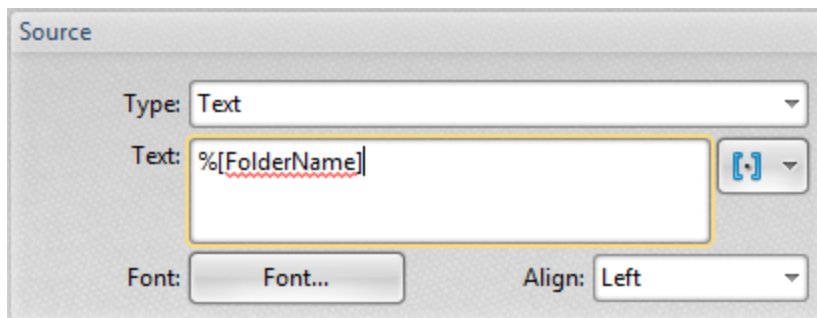

Figure 1. Add Watermark Dialog Box, Source Options

- Instead of entering custom text to be used as the watermark text, entering the %FolderName macro will result in the folder name being used as the text for the watermark.

Date

Date

The **Date** macro uses the name **Date** and returns the date at the time of creation.

The syntax for this macro is **%[Date:<Parameter>]**

The available parameters are detailed below and can be entered as a <date formatting string>. The date formatting string follows standard windows date coding. It can be customized and displayed as combinations of the parameters below:

- **d** displays the day of the month in digits and omits the zero in cases of single-digit values.
- **dd** displays the day of the month in digits and includes a zero in cases of single-digit values.
- **ddd** displays the day of the week in a three-letter abbreviation.
- **dddd** displays the day of the week in full.
- **M** displays the month as digits and omits the zero in cases of single-digit values.
- **MM** displays the month as digits and includes a zero in cases of single-digit values.
- **MMM** displays the month as a three-letter abbreviation.
- **MMMM** displays the month in full.
- **y** or **yy** displays the year as two digits and adds a zero in cases of values lower than 10.
- **yyyy** displays the year in full.

For example, the string **%[Date:ddd, MMMM dd, yyyy]** creates the date **Tue, February 23, 2016.**

If no parameters are specified then the value will revert to its default, which is the parameters of the operating system of the local machine in the format **dd/MM/yyy.**

Year

Year

The **Year** macro uses the name **Year** and returns the current year as a four-digit value.

The syntax for this macro is **%[Year]**

Month

Month

The **Month** macro uses the name **Month** and returns the current month as a two-digit value.

The syntax for this macro is **%[Month]**

Day

Day

The **Day** macro uses the name **Day** and returns the current day as a two-digit value.

The syntax for this macro is **%[Day]**

Time

 Time

The **Time** macro uses the name **Time** and returns the current time (day, month, year, AM/PM in any combination - see below).

The syntax for this macro is **%[Time]** for the standard Windows format or **%[Time]:<Parameter>]** for custom formats.

The <parameter> value is a standard Windows <time formatting string>. Available parameters are detailed below:

- **h** returns the hours and omits the zero in cases of single-digit values.
- **hh** returns the hours and includes a zero in cases of single-digit values.
- **H** or **HH** returns the hours, includes a zero in cases of single-digit values and uses a 24 hour-clock when applicable.
- **m** returns the minutes and omits the zero in cases of single-digit values.
- **mm** returns the minutes and includes a zero in cases of single-digit values.
- **s** returns the seconds and omits the zero in cases of single-digit values.
- **ss** returns the seconds and includes a zero in cases single-digit values.
- **t** returns a single character to reference the a.m./p.m. variable, such as A/P.
- **tt** returns two characters to reference the a.m/p.m. variable, such as AM/PM.

For example, when using the **Export to Images** feature, the following options are visible in the Export to Images dialog box:
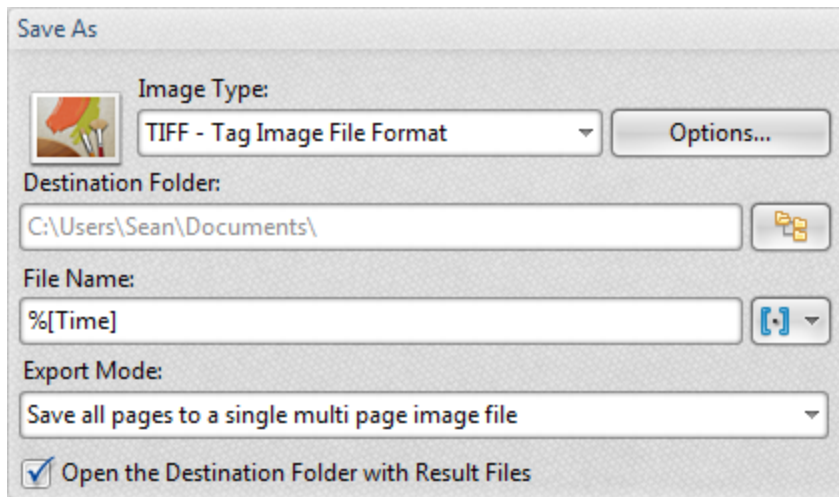
Figure 1. Export to Images Dialog Box. Save As Tab

- If **%[Time]** is added to the file name text box, then the time of document creation will be added to the file name when it is created.

Hour

Hour

The **Hour** macro uses the name **Hour** and returns the current hour as as either a single or double-digit value.

The syntax for this macro is **%[Hour]**

Minute

Minute

The **Minute** macro uses the name **Minute** and returns the current minute as as either a single or double-digit value.

The syntax for this macro is **%[Minute]**

Seconds

Seconds

The **Seconds** macro uses the name **Seconds** and returns the current seconds as as either a single or double-digit value.

The syntax for this macro is **%[Seconds]**

Computer Name

Computer Name

The **Computer Name** macro uses the name **Computer** and returns the name of the local computer set as the Windows Computer Name.

The syntax for this macro is **%[Computer]**

User Name

User Name

The **User Name** macro uses the name **User** and returns the name of the user account logged into windows at the time of use.

The syntax for this macro is **%[User]**

Environment Variable

Environment Variable

The **Environment Variable** macro uses the name **Env.** The syntax for this macro is **%[Env:<Parameter>].** It returns the value of the parameters entered from the available Environment Variables, which are detailed below:

- **ALLUSERSPROFILE**
- **APPDATA**
- **CommonProgramFiles**
- **CommonProgramFiles(x86)**
- **CommonProgramFilesW6432**
- **COMPUTERNAME**
- **HOMEDRIVE**
- **HOMEPATH**
- **LOCALAPPDATA**
- **LOGONSERVER**
- **OS**
- **PROCESSOR_ARCHITECTURE**
- **ProgramData**
- **ProgramFiles**
- **ProgramFiles(x86)**
- **ProgramFilesW6432**
- **PUBLIC**
- **SESSIONNAME**
- **SystemDrive**
- **SystemRoot**
- **TEMP**
- **TMP**
- **USERDOMAIN**
- **USERNAME**
- **USERPROFILE**
- **windir**

Application Version

Application Version

The **Application Version** macro uses the name **AppVersion** and returns the value of the user's version and build of the **PDF-XChange Editor** that is currently installed.

The syntax for this macro is **%[AppVersion]**

Image Number

Image Number

The **Image Number** macro uses the name **ImageNumber** and returns an enumeration of output images from a page.

The syntax for this macro is **%[ImageNumber:<Parameter>]**

The available parameters are detailed below:

- **r** returns the enumeration in lower-case roman numerals.
- **R** returns the enumeration in upper-case roman numerals.
- **L** returns the enumeration as page labels in cases where page labels are specified. If they are not specified then page numbers will be used.
- **<integer>** indicates the minimum number of digits used to display the formatted page number. For example if "4" is entered then numbering will start at 0001.

Auto Number

Auto Number

The **Auto Number** macro uses the name **AutoNumber** and returns an enumeration of output files.

The syntax for this macro is **%[AutoNumber:<Parameter>]**

The available parameters are detailed below:

- **r** returns the enumeration in lower-case roman numerals.
- **R** returns the enumeration in upper-case roman numerals.
- **L** returns the enumeration as page labels in cases where page labels are specified. If they are not specified then page numbers will be used.
- **<integer>** indicates the minimum number of digits used to display the formatted page number. For example if "4" is entered then numbering will start at 0001.

Macro-Enabled Operations

![PDF-XChange Editor logo] **Macro-Enabled Operations**

Macros are available for the operations detailed in the table below:

OPERATION	LOCATION
Bates Numbering	**Document Tab> Bates Numbering> Add to Multiple Files**
Extract Pages	**Document Tab> Extract Pages**
Export to Images	**File Tab> Export to Images**
From Image File(s)	1. **File Tab> New Document> From Image File(s)** then click **Options.** The **Images to PDF** dialog box will open. Select **Image Labels** in the Categories menu. Macros can be used in the text box. 2. **Document Tab> Insert Pages > Insert Images** then click **Options.** The **Images to PDF** dialog box will open. Select **Image Labels** in the Categories menu. Macros can be used in the text box.
From Text Files	1. **File Tab> New Document> From Text Files** then click **Options.** The **Options** dialog box will open. Select **File Separator** in the Categories menu. Macros can be used in the text box.

	2. **Document Tab> Insert Pages> Insert Text** then click **Options.** The **Options** dialog box will open. Select **File Separator** in the Categories menu. Macros can be used in the text box.
Launch Application	**Edit> Preferences>** then select **Launch Applications** in the Categories Menu. Click **New.** The **New Launch Application** dialog box will open. Macros can be used in the **Parameters** text box.
Stamps Palette	**Main Menu> Tools> Comment And Markup Tools> Stamps Palette** then click **New from File** and select a file to be used as a stamp. Macros can be used in the **Stamp Title** text box.
Summarize Comments	**Comments> Summarize Comments.** Macros can be used in the **File Name** text box.
Watermarks	**Document> Watermarks> Add>.** Macros can be entered in the **Text** text box.

Macro-Operation Compatibility

The table below details the compatibility of available macros in conjunction with operations that are macro-enabled:

MACRO	OPERATION							
	Bates Numbering	**Extract Pages**	**Export to Images**	**From Image File(s)**	**From Text Files**	**Stamps Palette**	**Summarize Comments**	**Watermarks**

Document Title	Yes	Yes	Yes	No	No	Yes	Yes	Yes
Document Index	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Document Info	Yes	Yes	Yes	No	No	Yes	Yes	Yes
Page Number	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Number of Pages	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
File Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Folder Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Date	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Year	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Month	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Day	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Time	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Hour	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Minute	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Seconds	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Computer Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
User Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Environment Variable	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Application Version	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Image Number	Yes	Yes	No	No	Yes	Yes	Yes	No
Auto Number	Yes	Yes	Yes	Yes	No	Yes	Yes	No

Page Content Editing

Page Content Editing

PDF-XChange Editor features full-page content editing. These options facilitate the convenient and efficient editing of PDF documents. When a document is open in the main window, select the **Edit Content** tool from the **Content Editing Toolbar:**

 The **Edit Content** tool is used to edit exiting content. When it is selected, the active document will be divided into editable sections based on the images and text it contains. These sections can then be resized and relocated. Follow the instructions below to edit content:

> 1. Click the content item to be edited. (Click and drag to specify an area as opposed to an object). A bounding box with yellow handles will appear:
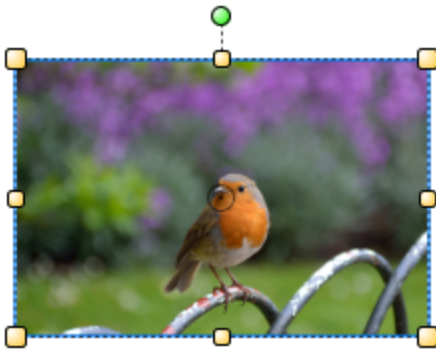
> 2. Click and drag a yellow handle to resize the object.
>
> 3. Click and hold on the central circle to relocate the object. Move the object to the desired location and release the pointer.
>
> 4. Click and drag on the green handle to rotate the object.
>
> 5. Right-click on the object to view further editing options. These include the standard cut, copy, paste and delete functions, as well as a link to the **Properties** pane.
>
> 6. Click on the specific areas of the properties pane to edit them.

Editing Text

It is also possible to edit text and/or text blocks within **PDF-XChange Editor.** Follow the instructions below to edit a text block:

1. Enable the ![icon] **Edit Content** tool.

2. Use the **Edit Content** tool to select the the text block to be edited. It can then be moved, resized or rotated in the same manner as images (see above).

3. Double-click the selected text block to edit the text.

4. Right-click the text to launch the following menu:
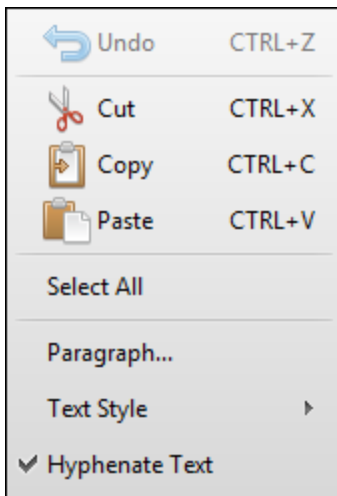
Figure 1. Editing Options

- Click **Undo** to reverse the most recent action.
- Click **Cut** to remove selected text and copy it to the clipboard.
- Click **Copy** to copy the selected text to the clipboard.
- Click **Paste** to paste the clipboard text to the selected location.
- Click **Select All** to select the whole text from the chosen text box for editing.
- Click **Paragraph** to launch the **Paragraph Options** dialog box, which is explained in *(figure 2)* below.
- Click **Text Style** to determine further options for the text style. They are as follows:
  - Bold
  - Italic
  - Underline
  - Superscript
  - Subscript
  - Clear Text Formatting

- Make Current Text Format as Default
- Apply Default Text Format
- Select the **Hyphenate Text** option to automatically hyphenate text. This means that text will be hyphenated automatically when it does not fit to the relevant margins.
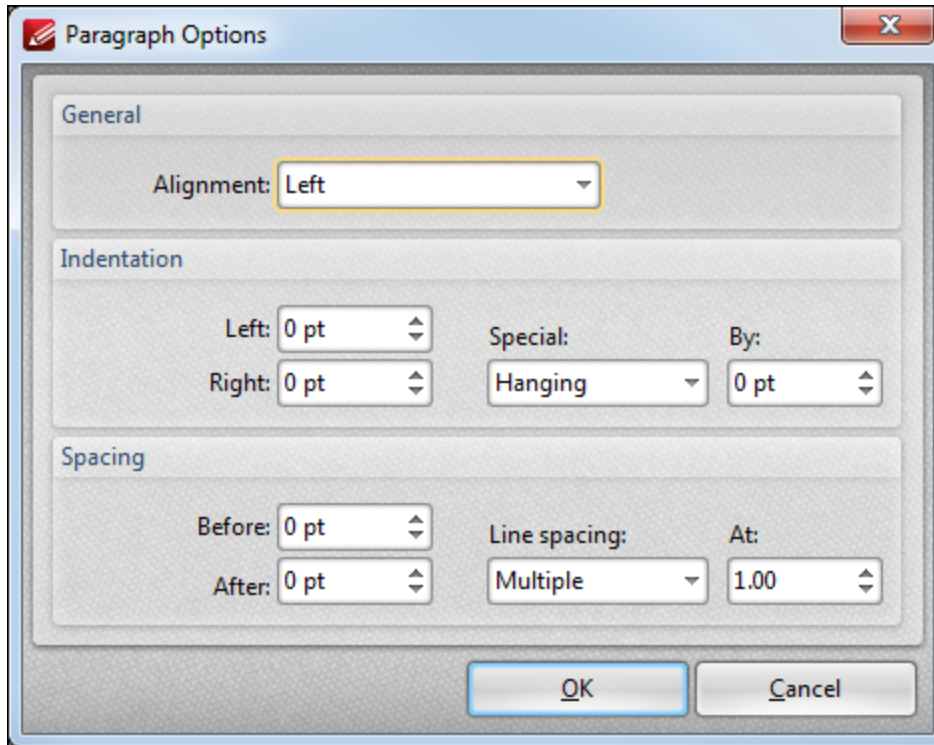
Figure 2. Paragraph Options

- Use the **Alignment** menu to determine the alignment of the paragraph.
- Use the **Indentation** number boxes to determine the indentation from the left and right margins.
- Use the **Special** and **By** menus to determine the **Hanging** options.
- Use the **Spacing** options to determine the line spacing.

Read Out Loud Feature

Read Out Loud Feature

This feature of **PDF-XChange Editor** enables the software to "read out loud" text within documents. The operating instructions are outlined below:

1. Open the document that contains the text.

2. Move to the **Standard Toolbar** and select the **Select Text Tool**.

3. Select the text to be read out loud.

4. Right-click the text.

5. Select **Read Out Loud Selected Text.**

6. The selected text will be read out loud according to the specifications determined here. 325

7. Select **Stop Reading** to halt the process.

Shell Extensions

Shell Extensions

PDF-XChange Editor features a windows shell extension. This means that thumbnails of PDF files are displayed in Windows Explorer. When thumbnail mode is being used in Windows Explorer, thumbnails of the first page of PDF documents and displayed instead of standard PDF document icons. This happens when the active folder is set to view medium, large or extra-large icons.

iFilter

The shell extension includes a very powerful search tool - the PDF iFilter. This tool can be used to index PDF documents with Microsoft iFilter indexing. This means that windows will locate search terms through not only document names, but also text within documents, annotations, bookmarks, document XMP information and files attached/embedded within documents. This process takes place automatically when using the standard Windows search option.

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8 **PDF-XChange Lite V6 User Manual**

PDF-XChange Lite V6 User Manual

PDF-XChange Lite is the lite version of our best-selling software for the creation and virtual printing of industry-standard PDF files - **PDF-XChange Standard.** It's compatible with files from almost all Windows applications such as MS Word, Excel and AutoCAD. We have greatly enhanced our software - it now features an optimized engine that significantly increases the quality of conversion for images and image-based text characters. Converted files are smaller in this version too - allowing for faster uploads/downloads, a reduction in storage space and increased data retention - even at high levels of compression.

Use the **Table of Contents** on the left to browse the topics of this manual. Click topics to expand them.

Click the icons above the chapter headings to search the following:

Table of Contents

Keyword Index

Search Topics

8.1   Introduction

Introduction

Thank you for choosing **PDF-XChange Lite V6.**

We have added many features and improved many others from version five, but one thing remains the same: **PDF-XChange Lite** creates highly-optimized PDF files from a wide range of Windows software and is unmatched in its ability to combine high-level compression with quality documentation that retains its original format.

PDF-XChange Lite installs as a virtual printer. Virtual printers operate in a different manner from standard printers. Instead of printing documents on paper, a virtual printer generates a fully-compatible, industry-standard, native PDF file. When suitable source material is used these documents will feature searchable text, which greatly increases the efficiency of searching, selecting and editing files.

Our software is very simple to use. Once it is installed as a printer on the local computer, select the files to print virtually and click **Print,** as with a standard document. When prompted to select a printer, select **PDF-XChange Lite V6** and the file will be printed virtually. There are several further options that determine the parameters of created documents. For example, it is possible for new documents to retain the same name as the document from which they were created, as well as include macros in document names.

PDF-XChange Lite requires no additional 'plug-ins' or software - it's ready to go out of the box. However, we recommend installing another of our products, **PDF-XChange Editor,** for the viewing and manipulation of files created using **PDF-XChange Lite.** It's completely free, and they are designed to work in tandem with each other. A free download of **PDF-XChange Editor** is available at the download page of our website, which is located **here.**

PDF-XChange Lite V6, PDF-XChange Editor and **PDF-Tools** are trademarks of Tracker Software Products Ltd. **AutoCAD** is a trademark or registered trademark of **Autodesk, Inc.** Windows is a trademark or registered trademark of **Microsoft Inc.** All other trademarks are the property of their respective owners.

If you have any queries or questions please don't hesitate to **Contact Us** - we aim to respond to all communication within half an hour.

8.2 Features Overview

Features Overview

PDF-XChange Lite is a reduced version of **PDF-XChange Standard** that contains only basic features for use with virtual printing. It combines high quality conversion with optimized compression to create beautiful documents that are surprisingly small in their file size. The main features of **PDF-XChange Lite** are detailed below:

- **Document Information** options that support both basic and advanced settings, including the option to add XMP Metadata.
- **Embedding of Fonts** to ensure viewing consistency. Chinese, Japanese and Korean fonts are now also available.
- **Enhanced Saving** options that determine where files are saved and how they are named. Macros have been introduced to increase workflow efficiency.
- **Language** options that support a wide range of languages.
- **Paper Properties** offer dynamic options for paper size, resolution, scaling and output.

8.3 PDF-XChange Lite Printer Settings

PDF-XChange Lite Printer Settings

PDF-XChange Lite features many customizable settings. These are accessible from the printers list. Follow the steps below to adjust the settings:

1. Click the **Windows Start Button**.

2. Click **Control Panel.**

3. In the **Control Panel** dialog box, click **Devices and Printers.**

4. In the **Printers** tab, point to the printer **PDF-XChange Lite** and right-click.

5. Select **Printing Preferences** from the menu options. The **PDF-XChange Lite V6 Printing Preferences** dialog box will open:
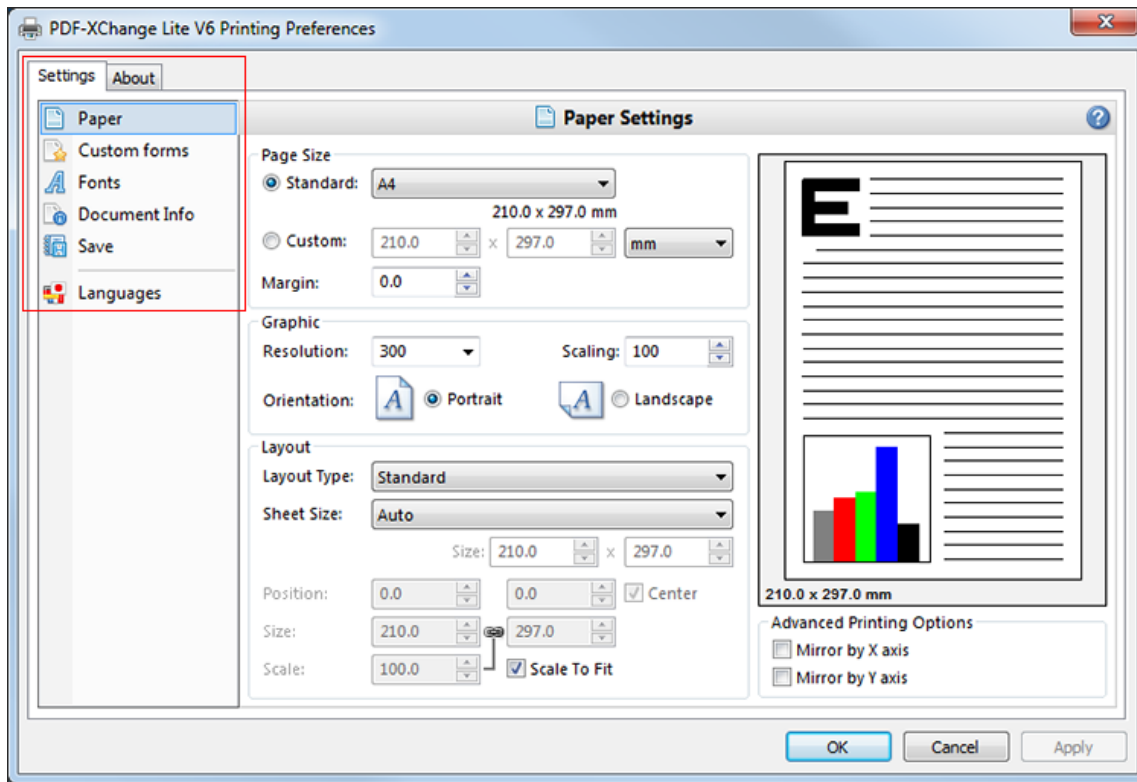
Figure 1. PDF-XChange Lite V6 Printing Preferences Dialog Box. Settings Tab Highlighted

6. Use the **Settings** tab highlighted in *(figure 1)* to select settings. All settings are listed below. Click them to access further information:

- **Paper** 618
- **Custom Forms** 627
- **Fonts** 629
- **Document Info** 631
- **Save** 633
- **Languages** 638

About

The **About** tab can be used to access further information about the product, view help pages, check for updates and register new serial keys/activation codes.

Paper

 Paper

The **Paper Settings** determine the properties of printed documents. They can be used to adjust the size, orientation, margin and scaling factor of pages, as well as the DPI resolution of images within the page. There are further settings to mount multiple original pages on a single PDF and change the print order of pages from the document in question.

Please note that some programs, such as Microsoft Word, override the properties determined in the Paper Settings dialog box. This is because they use values that are determined within their own parameters for these options and give those values priority over other options.

Click **Paper** in the menu on the left of the main window to customize the **Paper Settings.**
The following dialog box will launch:
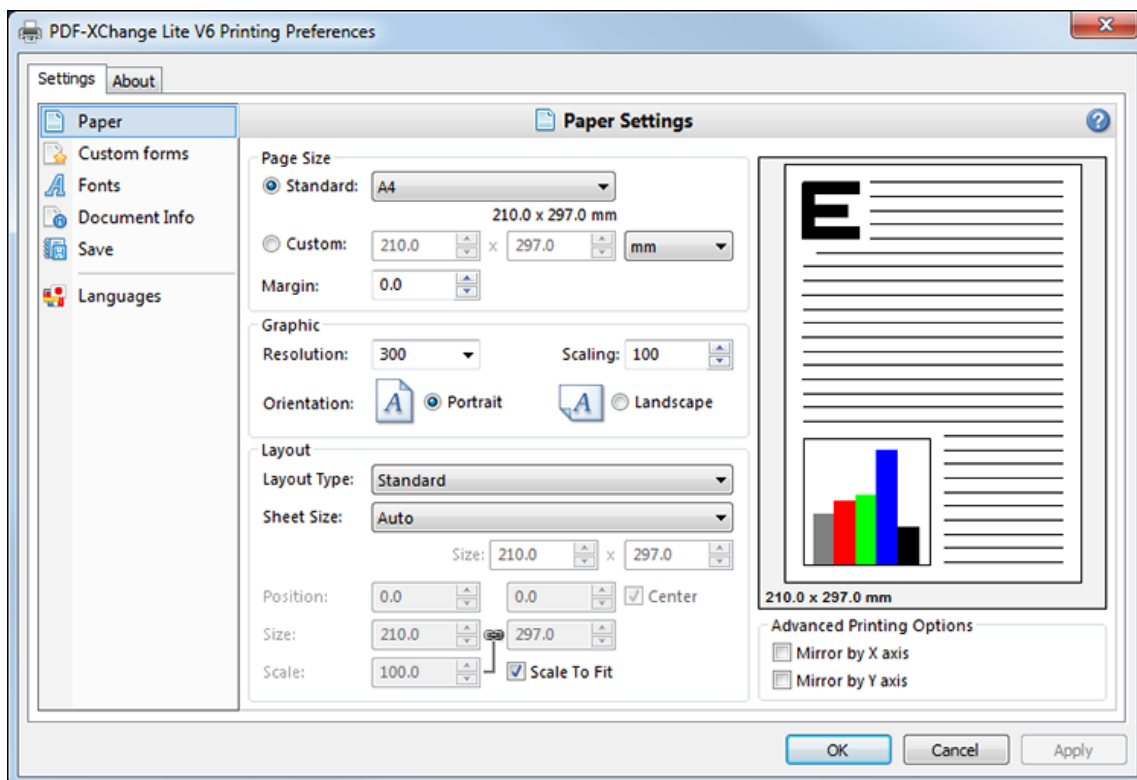
Figure 1. Paper Settings Dialog Box

Page Size

There are four settings that determine the page size:

- **Standard** includes all those that are considered standardized sizes, such as those used by the **ISO** and **ANSI.**
- **Custom** allows the user to enter custom dimensions up to a maximum of two hundred inches.
- **Units** determine the units of measurement used when referring to the custom page size. Millimeter is the default setting. Click the menu for further options.
- **Margins** is used to adjust the margin settings of the page. Values entered will affect all margins. If greater control over margins is desired then documents should be formatted using alternative software before they are used in conjunction with **PDF-XChange Lite.**

Please note that the AutoCAD software is known for suffering bugs during printing, especially when it plots to virtual print drivers such as PDF-XChange. If problems arise, especially in regard to portions of output exceeding the defined margin/page limits, we recommend setting a margin of at least 3.2mm.

Graphic

There are three settings that determine the settings for graphics within the page:

- **Resolution** is measured in **DPI** (dots per inch). Enter the desired amount in the **Resolution** menu. (Increasing **DPI** usually decreases the PDF file size).
- **Scaling** is used to adjust the original page size to match those of the converted document. Scale documents up or down in size as required.
- **Orientation** is used to toggle between **Portrait** and **Landscape.**

Page Layout

There are three options that determine the page layout of documents:

- **Standard** is the default setting of one page per PDF page. See **here** 621 for further options.
- **Booklet** is intended for use with booklets and other similar documents. The page layout facilitates "2-up pages" for booklet binding. See **here** 623 for further options.
- **Multiple Pages Per Sheet** is used when there is more than one document page per PDF page. Permitted values for documents per page are 1,2,4,6,8,9 and 16. Select a

value to see the layout in the preview window on the upper right. See **here** ⌐625⌐ for further information.

Sheet Size

There are three options that determine the sheet size:

- **Auto** means the software sets the sheet size automatically.
- **Custom** allows the user to enter custom dimensions.
- **Standard** options allow the user to select standard dimensions, such as those used by the **ISO** and **ANSI.**

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Standard Layout

 Standard Layout

The **Standard** layout in **PDF-XChange Lite** is one document page per PDF page. When it is selected in the **Layout Type** menu the following options are available:
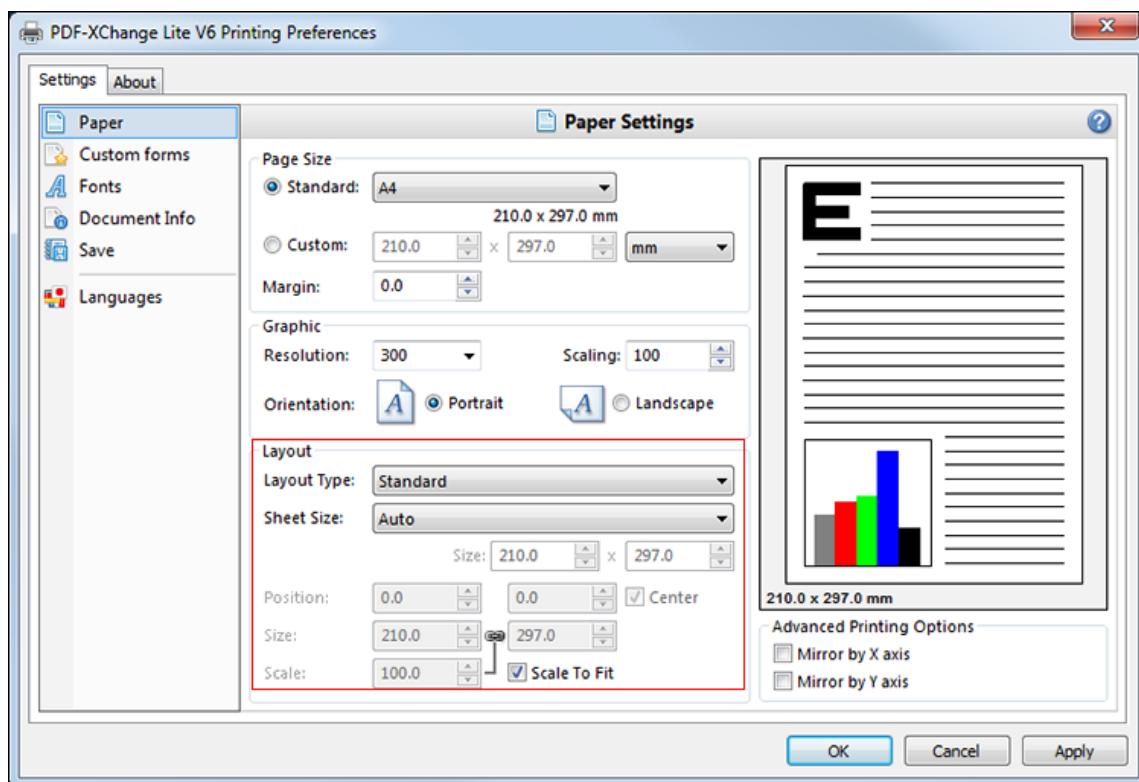
Figure 1. Paper Settings Dialog Box. Standard Options

The layout controls allow the user to determine the page size and positioning of page contents within the document. There are three options in the **Sheet Size** menu:

- **Auto** means the software sets the sheet size automatically. The default size is 210mm x 297mm.
- **Custom** allows the user to enter custom dimensions.
- **Standard** options allow the user to select standard dimensions, such as those used by the **ISO** and **ANSI.**

The **Scale To Fit** box is checked by default. This means that the layout options selected will scale to the page size. Clear the box to disable this option. It is then possible to use the pointer to resize the page.

Custom

This option allows the user to enter custom dimensions to determine the page size. Enter the desired dimensions in the **Size** boxes.

Standard

These options relate to standard sizes. Select the desired size from the menu. The document dimensions will update automatically.

Position

The positioning of the document is centered by default as the **Center** check box is selected. This also means that the document will remain centered when the page size is adjusted manually. Clear the box to enter custom dimensions in the **Position** boxes. The page position can then be set to anywhere within the page dimensions without being centered.

Booklet Layout

　Booklet Layout

The booklet option is intended for use when documents are printed to compose a booklet. When it is selected in the **Layout Type** menu the following options are available:
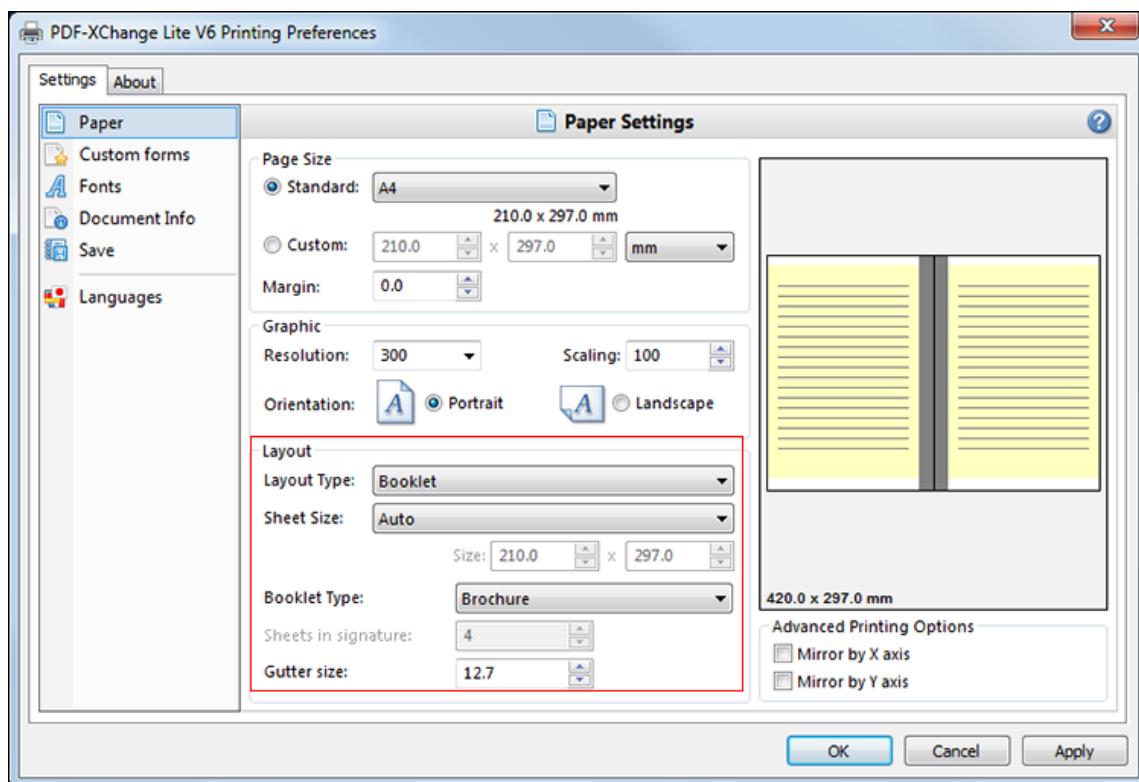
Figure 1. Paper Settings Dialog Box. Booklet Options

- The **Sheet Size** options are **Auto, Custom** and **Standard:**
  - **Auto** means the software sets the sheet size automatically. The default size is 210mm x 297mm.
  - **Custom** allows the user to enter custom dimensions.
  - **Standard** options allow the user to select standard dimensions, such as those used by the **ISO** and **ANSI.**
- The **Page Per Sheet** option determines how many pages feature on each sheet. Use the menu to select the desired option. There are seven options that all feature

different layouts. When an option is selected the layout will display in the preview window.

- The **Booklet Type** menu determines the format of the booklet. There are two options: **Brochure** and **Book.** Brochures are usually two or four pages in length and fit on a single sheet. Books have significantly more pages than brochures and usually feature double-sided printing. The manner in which sheets are folded to create the book is determined using the **Sheets in signature** option.
- The **Gutter size** option determines the inner margin area between pages where binding takes place. It is represented by the gray area in the preview window pane. The default size is 12.7mm as this is the industry standard for binding.

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Multiple Pages per Sheet

Multiple Pages per Sheet

This option is intended for use when more than one document per PDF page is desired. When it is selected in the **Layout Type** menu the following options are available:
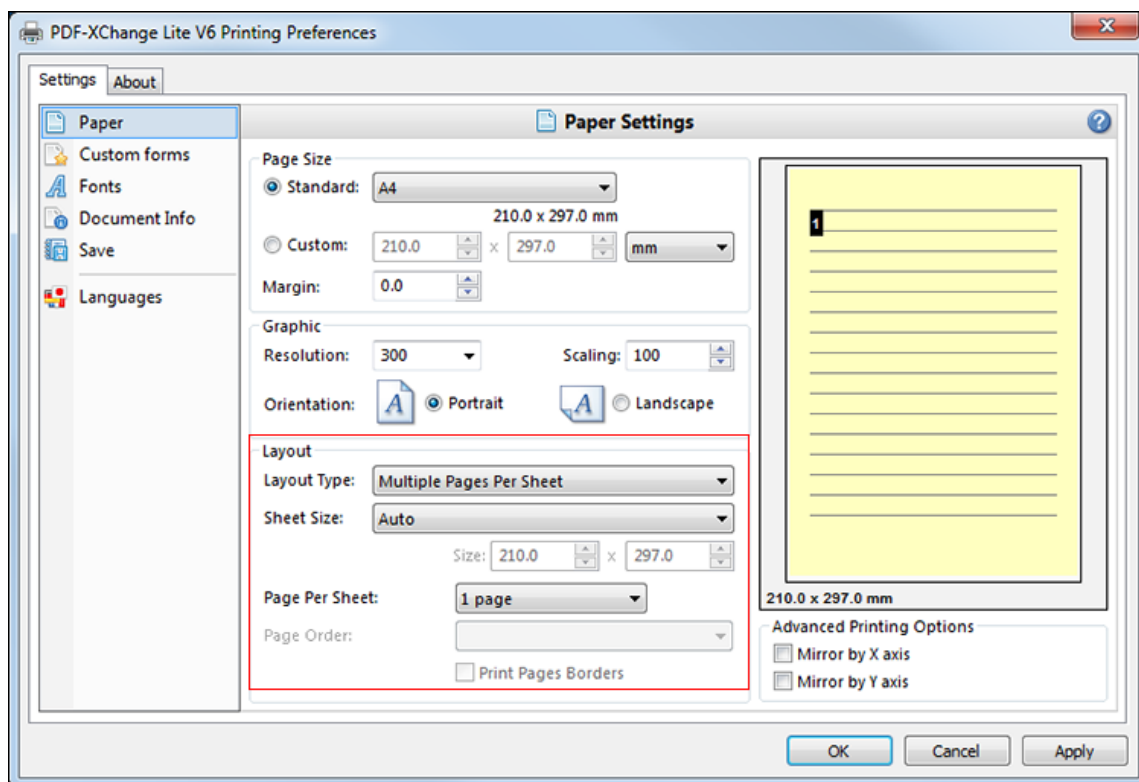
Figure 1. Paper Settings Dialog Box. Multiple Pages Per Sheet Options

- The **Sheet Size** options are **Auto, Custom** and **Standard:**
  - **Auto** means the software sets the sheet size automatically. The default size is 210mm x 297mm.
  - **Custom** allows the user to enter custom dimensions.
  - **Standard** options allow the user to select standard dimensions, such as those used by the **ISO** and **ANSI.**

- The **Page Per Sheet** option determines how many pages feature on each sheet. Use the menu to select the desired option. There are seven options that feature different layouts. When an option is selected the layout displays in the preview window.
- The **Page Order** menu determines the ordering of pages within the PDF document. When there is one page in the document this option is disabled. When there are two pages the options are either **left to right** or **right to left.** When there are four or more pages there are four actions: **Across From Left, Down from Left, Across From Right** and **Down From Right.**
- The **Print Pages Borders** box should be selected in order to print the page borders or cleared to exclude them from printing.

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Custom Forms

Custom Forms

The **Custom Forms** settings facilitate the saving of custom form dimensions for subsequent use. Click **Custom Forms** in the menu on the left of the main window to customize the **Custom forms settings.** The following dialog box will launch:
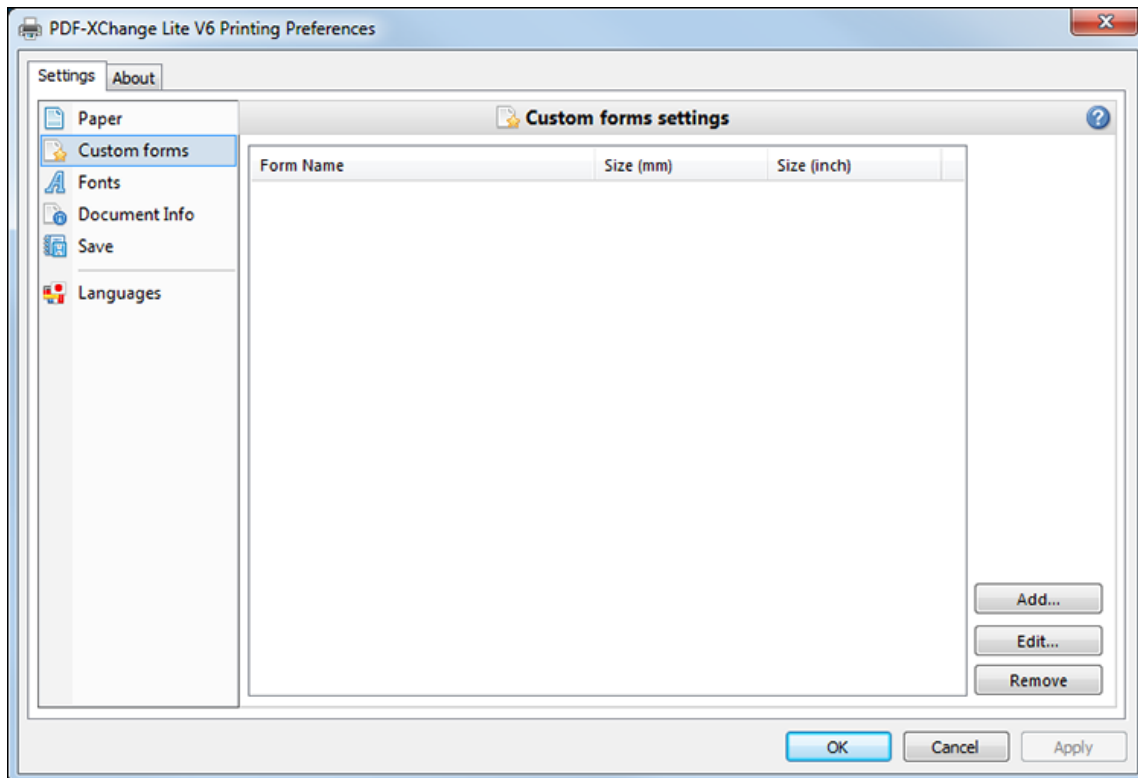

Figure 1. Custom Forms Settings Dialog Box

When custom forms have been created the options to **Edit** and **Remove** them are enabled. Click **Add** to add a new custom form. The **Add/Edit Custom Form** dialog box will open:
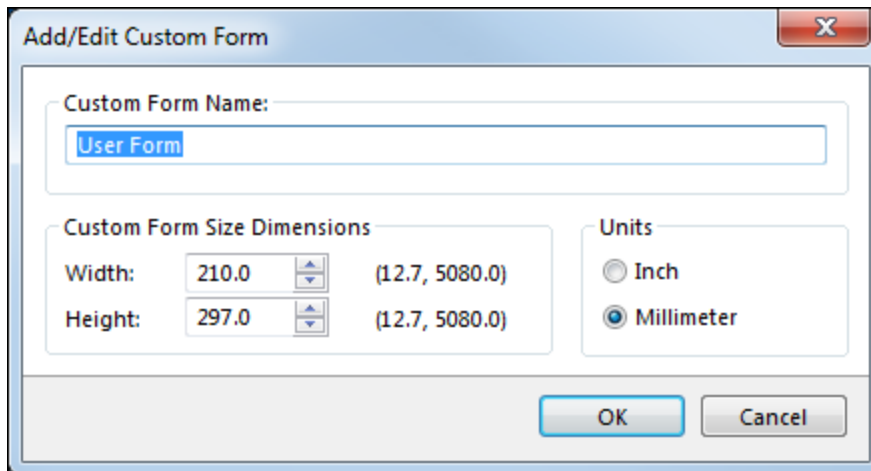
Figure 2. Add/Edit Custom Form Dialog Box

Enter a name into the **Custom Form Name** text box to name the customized dimensions. Enter the desired dimensions into the **Width** and **Height** boxes and select either **Inch** or **Millimeter** as the unit of measurement. When the desired dimensions have been entered, click **OK** to save settings. Click **Cancel** to end the process and close the dialog box.

When multiple custom forms have been created, select the desired custom form from the list and click **OK** to launch it. Click **Cancel** to end the process and close the dialog box.

Fonts

Fonts

The **Fonts** settings are used to edit the options for fonts. Click **Fonts** in the menu on the left of the main window to customize the **Font Embedding Options.** The following dialog box will launch:
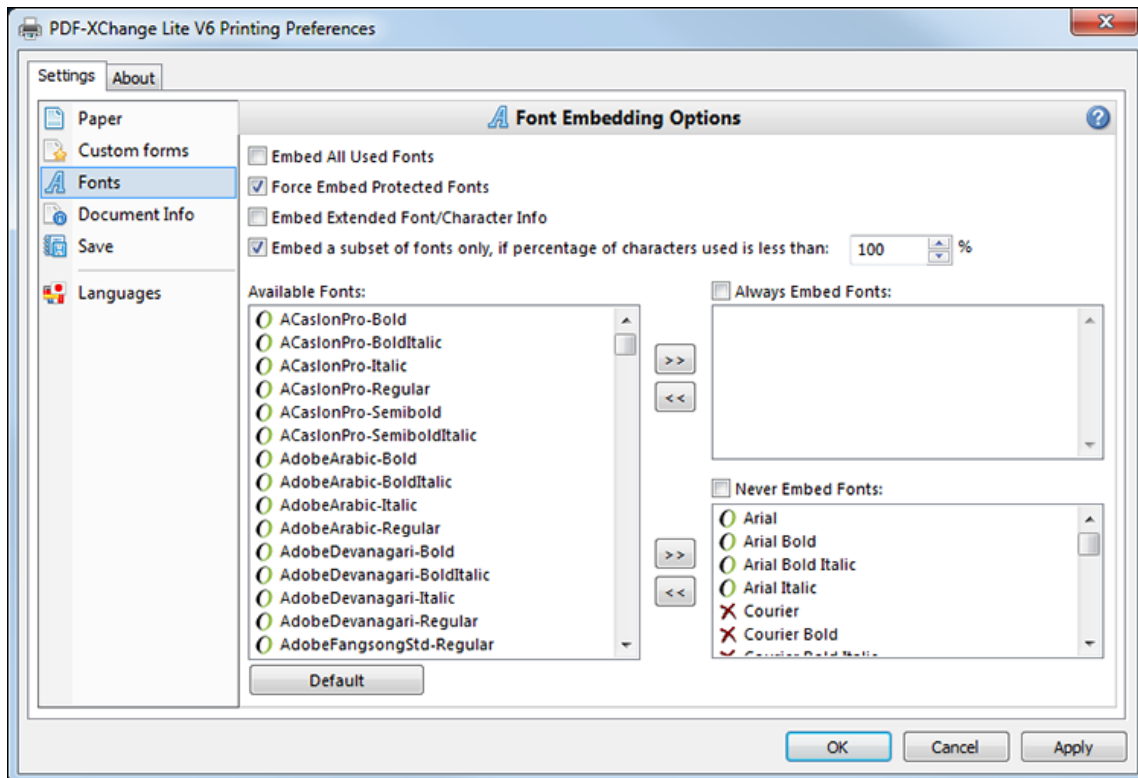
Figure 1. Font Embedding Options Dialog Box

As a general rule, common fonts such as Arial and and Courier should not be embedded and uncommon fonts should be embedded. This is because it is likely that end-users will already have common fonts available on their computers and thus their software will be able to reproduce the material without the need to embed fonts, which requires memory and increases the file size. This is not the case with uncommon fonts and that is why they should be embedded. We recommend using common fonts as far as possible when creating documentation in order to optimize the file size.

- Select the **Embed All Used Fonts** box to embed all fonts. This increases the file size but ensures the documentation can be viewed on any machine.
- Select the **Force Embed Protected Fonts** box to force the inclusion of protected fonts in documents. Ensure the existing license permits the distribution of fonts and file content as some fonts are not licensed for widespread distribution.
- Select the **Embed Extended Font/Character Info** box to embed extended fonts and character information.
- Select the **Embed a subset of fonts only, if percentage of characters used is less than** box to embed a subset of fonts when the percentage of the total fonts they represent within the documentation is less than the percentage entered into the adjacent box. This optimizes the file size, where possible, as it results in a subset of fonts being saved with the file as opposed to the entire font character set. This option is best used when the documentation created is intended only to be viewed, as opposed to edited - because the latter case will probably require a complete font character set.

If there is no intention to edit documents created using **PDF-XChange Lite** then it is recommended to retain the default settings.

Available Fonts

The **Available Fonts** window displays all fonts available for embedding. Select fonts and use the arrow icons to add them to either the **Always Embed Fonts** or **Never Embed Fonts** windows. The most common fonts are included in the latter window by default.

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Document Info

Document Info

The **Document Info** settings are used to determine whether or not PDF information is included with documents created in **PDF-XChange Lite.** Click **Document Info** in the menu on the left of the main window to customize **Document Information.** The following dialog box will launch:
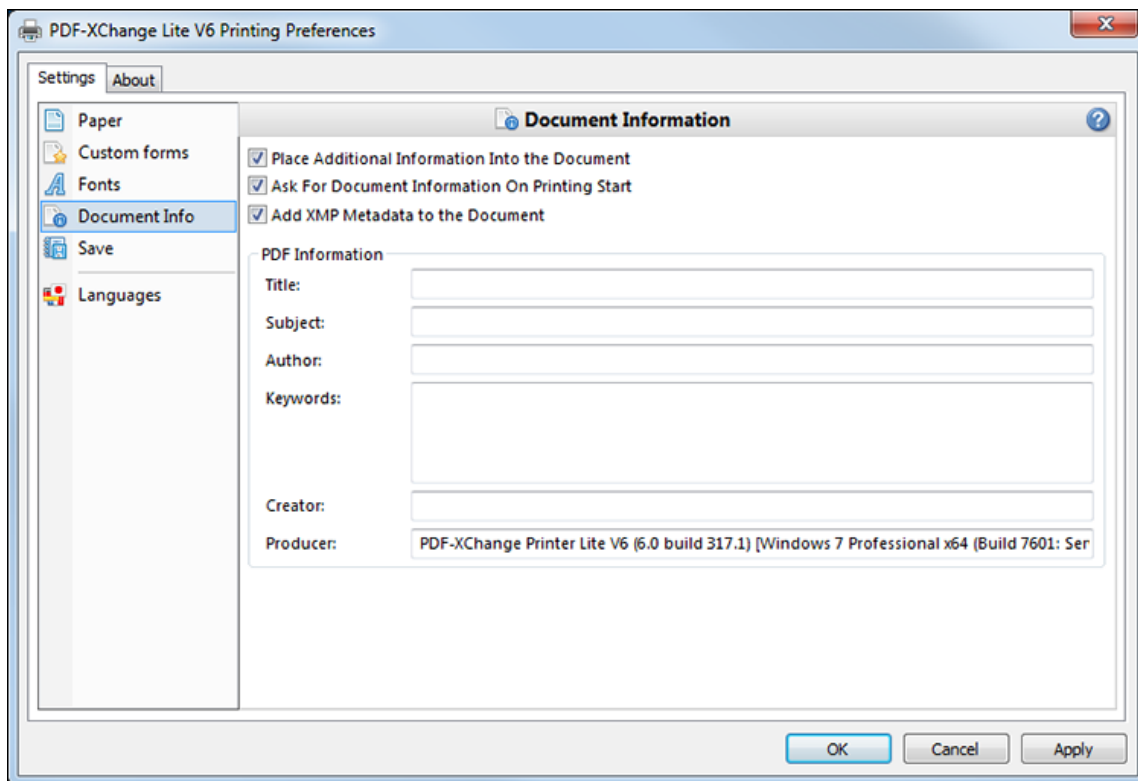
Figure 1. Document Information Dialog Box

- Select the **Place Additional Information Into the Document** box to enable further options.
- Select the **Ask For Document Information on Printing Start** box to launch a dialog box when PDFs are printed. Specified information can then be entered into the relevant fields.

- Select the **Add XMP Metadata to the Document** to add the (XMP) extension to documents. The (XMP) extension is explained **here.**
- Enter the PDF information to include in the **PDF Information** fields: **Title, Subject, Author, Keywords, Creator** and **Producer.**

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Save

Save

The **Save** settings in **PDF-XChange Lite** allow the user to specify the method through which the software names and saves created files. Click **Save** in the menu on the left of the main window to customize the **Save Settings.** The following dialog box will launch:
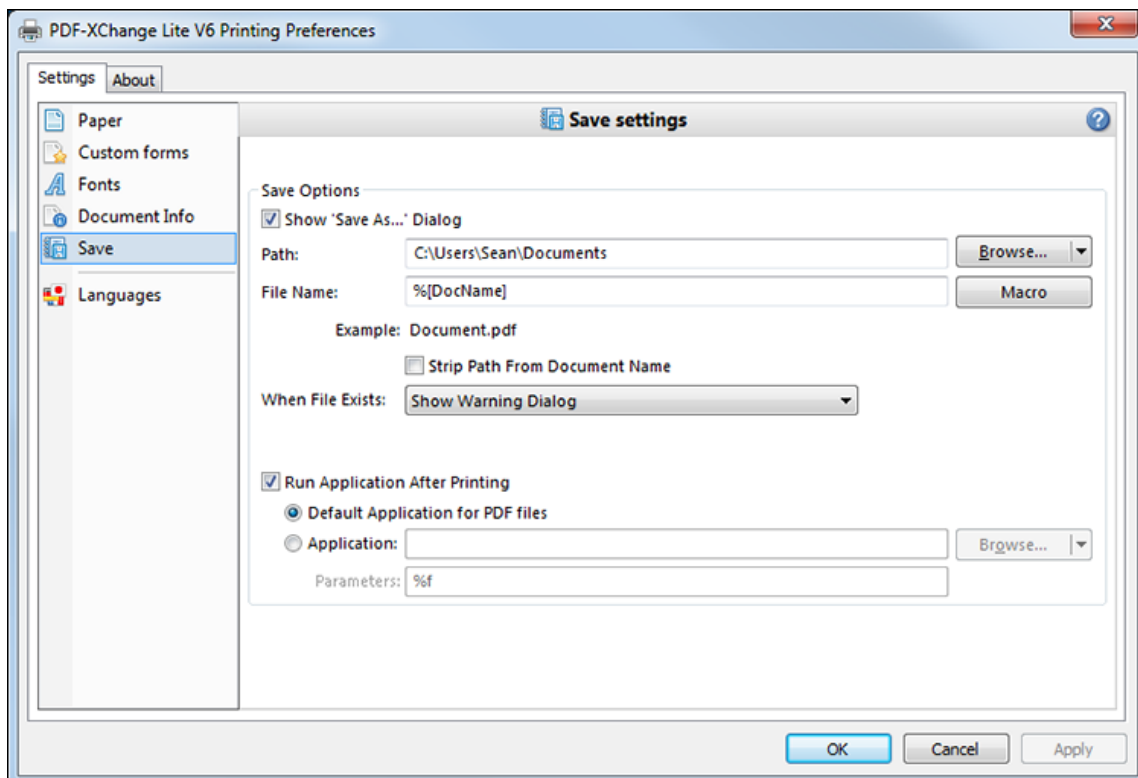
Figure 1. Save Settings Dialog Box

Save Options

- Select the **Show 'Save As...' Dialog** box to view the **Save As** dialog box when files are saved.
- Enter the desired path into the **Path** text box or click the **Browse** button to select a folder manually.

- Enter the desired filename into the **File Name** text box. The default name is the document name. It is possible to add **macros** ⌐635⌐ at this point.
- Select the **Strip Path From Document Name** box to strip the path from the document name.
- There are six options in the **When File Already Exists** menu. These options determine what happens when a file already exists with the same name as the file currently being saved.
  - **Show Warning Dialog** displays a warning message and prompts the user for action to take.
  - **Always Overwrite** means the new file overwrites the old file.
  - **Auto Number** saves the new file with the same name as the old file but appends it with a number.
  - **Merge with Existing (Append To)** appends the new file to the end of the old file.
  - **Merge with Existing (Insert Before)** inserts the new file as the beginning of the old file.
  - **Ask for new file name** prompts the user to enter a new file name.
- Select the **Run Application After Printing** box to view printed PDFs using an application:
  - Select the **Default Application for PDF files** option button to use the default program for viewing PDFs on the local computer.
  - Select the **Application** option button to enter an application name into the text box or use the **Browse** button to select an application manually.
  - Enter a value in the **Parameters** text box.

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

Document Macros

Document Macros

Macros are used in several of the settings within **PDF-XChange Lite**. 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to a corresponding output sequence. This means that complicated components of the output process can be reduced in the input process, making the work involved both less intensive and less error-prone.

The macros available in **PDF-XChange Lite** are used when saving files. They are added in square brackets after the file name that the user enters. All macros are detailed below. Unless otherwise specified, macros add the same details as the macro name to the file name:

- **Application Name**
- **Document Name** - see **here** ⌐636⌐ for further options.
- **Document Path**
- **Date** - see **here** ⌐636⌐ for further options.
- **Year**
- **Month**
- **Day**
- **Time**
- **Hour**
- **Minute**
- **Seconds**
- **Pages Count**
- **Computer Name**
- **User Name**
- **Environment Variable**

See **here** for a technical explanation of how macros function.

%[Docname], %[Date] and %[Time]

 %[Docname], %[Date] and %[Time]

These macros have further options and require a more in-depth explanation:

%[Docname]

At first glance this macro appears simple - it should retain the document name as part of the name used when files are saved. However, Microsoft defines the document name in a complex manner, which makes the process complicated. The **titrules.js** javascript is included in the software to solve this problem. This gives the software priority over other applications when documents are being saved. The **%[Docname]** macro is determined by the **getDocumentName** function in **titrules.js,** which takes the name used at the time of printing.

Please note that modifying the titjules.js javascript is a complicated process that only experienced javascript programmers should perform. If assistance is required then <u>Contact Us</u> **- we aim to respond to all communication within half an hour.**

%[Date]

The **%[Date]** macro can be expanded to include a date formatting string: **%[Date:<date formatting string>].** This can be used to further customize the manner in which the date is formatted. Available options are detailed below:

- **dd** - the day of the month displayed in digits. Single-digit dates feature a zero followed by the date.
- **ddd** - the day of the week displayed as a three-letter abbreviation.
- **dddd** - the day of the week displayed in full.

- **M** - the month displayed in digits.
- **MM** - the month displayed in digits (as above, but single-digit months feature a zero followed by the month).
- **MMM** - the month displayed as a three-letter abbreviation.
- **MMMM** - the month displayed in full.

- **yy** - the year displayed as the last two digits. Single-digit years feature a zero followed by the year.
- **yyyy** - the year displayed in full.

For example, the macro **%[Date:<ddd, MMM, dd, yy>]** creates the date formatting string: **"Wed, Aug 31, 94".**

%[Time]

The **%[Time]** macro can be expanded to include a time formatting string: **%[Time:<time formatting string>].** This can be used to further customize the manner in which the time is formatted. Available options are detailed below:

- **h** - hours displayed in digits with a 12-hour clock.
- **hh** - hours displayed in digits with a 12-hour clock. Single-digit hours feature a zero followed by the hour.
- **H** - hours displayed in digits with a 24-hour clock.
- **HH** - hours displayed in digits with a 24-hour clock. Single-digit hours feature a zero followed by the hour.

- **m** - minutes displayed in digits.
- **mm** - minutes displayed in digits. Single-digit minutes feature a zero followed by the minute.

- **s** - seconds displayed in digits.
- **ss** - seconds displayed in digits. Single-digit seconds feature a zero followed by the second.

- **t** - displays a single time marker string, such as **A** or **P** (to represent **a.m.** and **p.m.**).
- **tt** - displays a double time marker string, such as **a.m.** or **p.m.**

For example, the macro **%[Time:<"hh,mm, ss, tt">]** creates the time formatting string: **"11_29_40 PM".**

Languages

Languages

The **Languages** settings determine the language of the user interface in **PDF-XChange Lite.**
Click **Languages** in the menu on the left of the main window to change the language of the
interface**.** The following dialog box will launch:
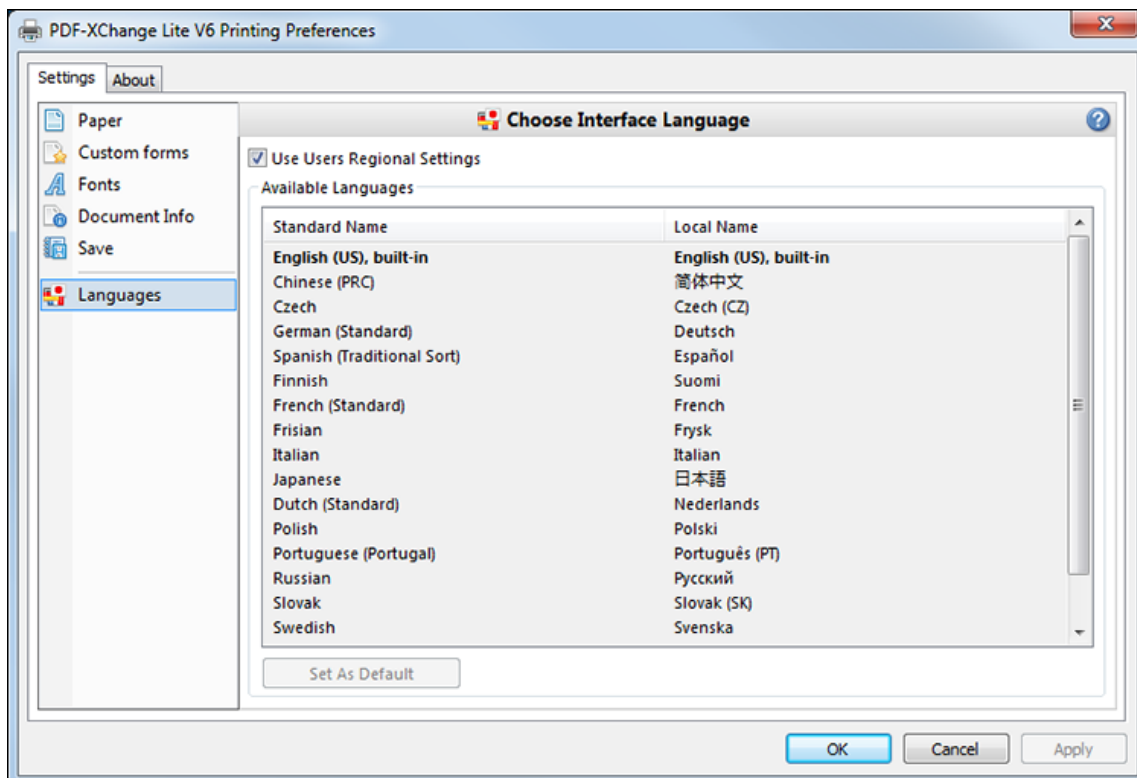
Figure 1. Choose Interface Language Dialog Box

The **Use Users Regional Settings** box is selected by default. This means that the language
of the regional setting is selected. Clear the box to select a different language from the
options displayed in the **Available Languages** window. Click the desired language to select
it. Then click the **Set As Default** button to set the selected language as the default
language.

When the desired settings have been selected, click **Apply** to apply changes. Click **OK** to close the dialog box and return to the main window. Click **Cancel** to close the dialog box and revert to previous settings.

PDF Saver

 PDF Saver

The **PDF Saver** is a special feature of **PDF-XChange Lite.** It facilitates the combination of multiple print jobs into a single PDF document. This has the additional benefit of making faster the initial temporary file generation, which allows the user to continue to queue new jobs prior to the final file assembly and generation.

The settings for the **PDF Saver** can be accessed using the windows start icon:

- Click the windows start icon in the taskbar.
- Enter "pdfsaver" in the search bar. Under the **Programs** search results, click **PDF-XChange Lite V6 pdfSaver** to open the **PDF-XChange Lite V6: pdfSaver** dialog box:
- Select the **Show Icon in System Tray** box to display an icon the taskbar when **PDF Saver** is open.
- Select the **Show Printing Progress Window** box to view the printing progress window when documents are printed virtually.
- Select the **Don't Remove Temporary Files** box to retain temporary files after printing documents.
- Select the **Autounload pdfSaver after** box to close the program after the amount of seconds entered in the adjacent number box. This optimizes the use of memory, especially on networks
- Enter a value for the **Progress Window Opacity** - this determines the transparency of the progress window.
- Click the **Hide** button to minimize the window.

- W -

- Z -