PDF-XChange Editor V10 USER MANUAL

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1 Welcome

PDF-XChange Editor V10

PDF-XChange Editor is one of the fastest and most feature-rich applications used worldwide to create, view, edit and annotate PDF files.

PDF-XChange Lite, our award-winning technology that installs as a virtual printer, is included with this product. It can be used to print-to-PDF from **Windows** applications and features an optimized hybrid engine that significantly increases the quality of conversion for images and image-based text characters, and prints to both **GDI** and **XPS.** The **PDF-XChange Lite** user manual is available **here.** [1296]

We offer several other applications for the manipulation of PDF and image files. See the **PDF-XChange Products Page** for more information. The **User Forums** are an excellent resource for troubleshooting, and our **Knowledgebase** contains over four hundred articles about our software and other relevant information. If you have any queries then please **Contact Us.**

Please note that this manual details **PDF-XChange Editor** when it is viewed in the **Classic UI.** It is also possible to use **PDF-XChange Editor** in the **Ribbon UI,** which was introduced in version seven, and the ribbon version of the manual is available **here.**

This manual is composed of the following sections:

- **Installation** [15] details the installation process, system requirements, installation switch options and licensing details for the software.
- **Features Overview** [60] details the main features of **PDF-XChange Editor.**
- **Explore the User Interface** [67] details the software as it appears via the classic user interface.
- The **Tabs Guide** [84] is structured to match the UI of the software and details comprehensive operational instructions for its features and functionality. The tabs of the **Menu Toolbar** each have a corresponding section in the manual, where their submenu options and associated settings are explained. The **Menu Toolbar** is highlighted in the image below.

- **Appendix** [1100] details additional information that relates to the software.
- **PDF-XChange Lite User Manual** [1296] is the user manual for the **PDF-XChange Lite** virtual printer, which is included with this product.
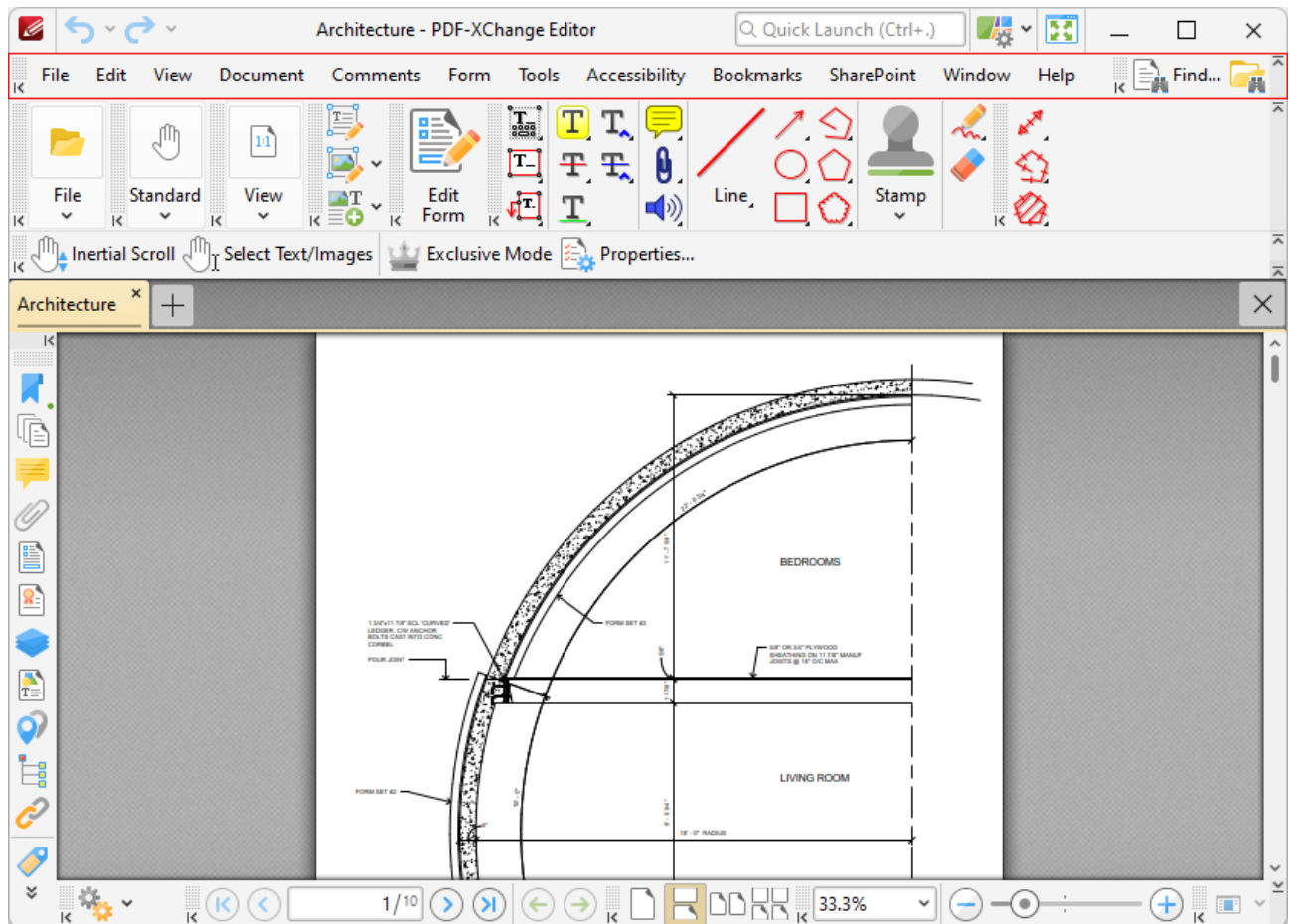
Figure 1. Menu Toolbar

A PDF version of this manual is available **here.** The system administrator's guide, for managing **PDF-XChange** products across an enterprise, is available **here.**

The PDF Format

The **Portable Document Format (PDF)** is an internationally-recognized file format that was developed in 1992 in order to present documents, including text formatting and images, between users of different platforms, application software, hardware and operating systems, who may not have access to mutually-compatible application software. PDF files are based on the **PostScript** page-description language, and every PDF file contains a complete description of a fixed-layout flat document, including the text, fonts, vector graphics, raster images and other information required to display it. PDF was standardized as an open format in 2008, and since then has expanded to contain a range of additional content besides flat text and graphics, including logical structuring elements, interactive elements

such as annotations and form fields, layers, rich media (including video content), three dimensional objects that use the **U3D** or **PRC** formats, encryption options, digital signatures, file attachments and document metadata. The specifications of the PDF format are defined and maintained by the **International Organization for Standardization (ISO),** which determines the content that is permitted in PDF documents, the properties of that content and the manner in which it can be manipulated. The original PDF specification was created in 1993, and since then it has been regularly expanded and enhanced to include additional content. The **ISO** published the most recent specification, **PDF 2.0, ISO 32000-2:2020,** in December 2020. All documents that are created and/or edited with **PDF-XChange Editor** conform to the **ISO** specification and are therefore compatible with all systems and software worldwide that also conform to the **ISO** specification.

2 Installation

Installation

Follow these steps to install **PDF-XChange Editor:**

1. Use the link in your purchase confirmation email, or the download option on the product page **here,** to download the free version of **PDF-XChange Editor.**

2. When the download is complete, click the **PDFXVE10.zip** file to open the containing folder. (**Winzip** and **CnetsDownload.com** have free downloads available if you require software to unzip files).

3. **PDFXVE10.exe** is displayed next to an icon. Double-click to launch the **Open File** dialog box.

4. Click **Run.** The **PDF-XChange Editor Setup** dialog box will open.

5. Click **Install.** (Available installation switches can be viewed/printed at this stage. Click **Help** for all available options and further information).

6. Click **Next.**

7. Read the **End-User License Agreement.** Select the box to accept the terms in the License Agreement. Click **Next.**

8. Select either **Custom** or **Complete** setup and select the installation location as desired.

9. Click **Next.**

10. Click **Install.**

Please note: when the installer is first run a prompt will ask for your registration number/activation code. We recommend copying and pasting this information from your receipt.

VERY IMPORTANT

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.

2.1 System Requirements

System Requirements

PDF-XChange Editor supports all **Windows** (32/64 bit) operating systems from **Windows 7** and later, including **Windows 11.**

Please note the following:

- All versions from **V4** to **V10** are **Microsoft/Citrix Terminal Server** compatible.
- All versions from **V4** to **V7** are **Windows XP/Vista** compatible.
- **V3** is still available for **Windows 95/98.**
- We recommend that users install the latest **Microsoft Windows** service packs and updates before using our products, as doing so will ensure the greatest possible performance of the software.
- Our products - in particular the printer drivers that **PDF-XChange Standard** and **PDF-XChange Lite** utilize - are not designed to work in virtualized environments such as the **XenApp** software.
- There are some limitations to product support for **Windows XP** as **Microsoft** have stopped supporting it. Further information about this issue is available **here.**
- If you are using **Windows 7** then please ensure you have the latest release and all available fixes - otherwise you may encounter issues, as detailed **here.**

2.2 Switches for MSI Installers

Switches for MSI Installers

The most useful options for msiexec are detailed below. Please note that parameters are case sensitive. All available options are detailed **here.**

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

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

This switch installs the product specified on the network as an administrative install.

Syntax

<Product.msi>

/j<u|m>

This switch advertises the specified product. "**u**" advertises to the current user, "**m**" advertises to all users.

Syntax

<Product.msi>

Parameters

- **[/t <Transform List>]**
- **[/g <Language ID>]**

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

The parameter for this switch can be either an .msi file or the relevant product code.

Display Options

/quiet

This switch installs the application without user interaction.

/passive

This switch installs the application in unattended mode. The user will see only the progress bar.

/q[n|b|r|f]

This switch sets the user interface level. **"b"** installs a basic UI, **"f"** installs a full UI and is the default setting, **"n"** means that no UI is installed, **"r"** installs a reduced UI.

Restart Options

/norestart

This switch disables the automatic system restart when installation is complete. (Please note that many **PDF-XChange** products require a restart to function properly).

/promptrestart

This switch prompts the user for a restart when it is necessary.

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

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

This switch is the equivalent for **/l*** <LogFile>.

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

The parameter for this switch can be either an .msi file or the relevant product code.

Modifiers

a - forces the reinstallation of all files.

c - if a file is missing or checksum does not match the calculated value.

d - if a file is missing or a different version is installed.

e - if a file is missing or an equal or older version is installed.

m - all required computer-specific registry entries. This is a default setting.

o - if a file is missing or an older version is installed. This is a default setting.

p - only if a file is missing.

s - all existing shortcuts. This is a default setting.

u - all required user-specific registry entries. This is a default setting.

v - runs from source and re-caches the local package.

Standard Properties

ADDLOCAL

The value of the **ADDLOCAL** property is a list of features, delimited with commas, that install locally. If it is not used then all available options will be installed. If it is used then all required features must be specified.

Syntax

ADDLOCAL=<list of features>

Features

- **F_Viewer** – **PDF-XChange Editor** and its components.
- **F_Plugins** – The plugins module for **PDF-XChange Editor.** (This requires **F_Viewer**).
- **F_Plugin_SP** – the spell-checker plugin. (This requires **F_Plugins**).
- **F_FileOpenPlugin** – the security plugin that handles FileOpen DRM. (This requires **F_Plugins**).
- **F_ReadOutLoudPlugin** – the plugin that provides read-out-loud functionality. (This requires **F_Plugins**).
- **F_OCRPlugin** – facilitates the use of the default OCR features. (This requires **F_Plugins**).
- **F_OptimizerPlugin** – the plugin that optimizes PDF files. (This requires **F_Plugins**).
- **F_BookmarksPlugin** – the plugin that facilitates the inclusion of advanced functionality for bookmarks. (This requires **F_Plugins**).
- **F_PDFAPlugin** – the plugin that converts PDF files into PDF/A format. (This requires **F_Plugins**).
- **F_SPPlugin** – the plugin that allows the software to work with files located on Sharepoint™/Office 365™ servers. (This requires **F_Plugins**).
- **F_GDPlugin** – the plugin that allows the software to work with files located on Google Drive™ cloud storage. (This requires **F_Plugins**).
- **F_OFCPlugin** – the plugin that allows the conversion of documents into **MS Office** formats. (This requires **F_Plugins**).
- **F_IdentifyFormsPlugin** - the plugin that enables the detection and creation of form fields in documents converted to PDF. (This requires **F_Plugins**).
- **F_DBPlugin** – the plugin that enables the software to work in conjunction with files located on the Dropbox™ cloud. (This requires **F_Plugins**).
- **F_EOCRAPlugin** – facilitates the use of the enhanced OCR features. (This requires **F_Plugins**).
- **F_AzureRMSPlugin** - the plugin for handling PDF files protected by **MS Azure RMS.** (This requires **F_Plugins**).
- **F_MDPlugin** – the plugin that enables the conversion of Markdown files into PDF documents. (This requires **F_Plugins**).
- **F_ODPlugin** – the plugin that enables working with files located on **Microsoft OneDrive.** (This requires **F_Plugins**).
- **F_BoxPlugin** – the plugin that enables working with files located on **Box.com.** (This requires **F_Plugins**).
- **F_3DPlugin** – the plugin that enables the viewing of embedded 3D content in PDF documents. (This requires **F_Plugins**).

- **F_ColorPlugin** – the plugin that enables the conversion of colors in PDF documents. (This requires **F_Plugins**).
- **F_CSVPlugin** – the plugin that enables the conversion of .csv files to tables in PDF documents. (This requires **F_Plugins**).
- **F_BrowserPlugins** – the plugin for web browsers that facilitates browser-based PDF file viewing. (This requires **F_Viewer,** as well as **F_IEPlugin** and/or **F_NPPlugin**).
- **F_NPPlugin** – the plugin for Firefox, Chrome, Safari and Opera. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_IEPlugin** – the IE plugin. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_SanitizePlugin** – the plugin that enables the sanitization of documents. (This requires **F_Plugins**).
- **F_VLangs** – the language localization files for the software (requires **F_Viewer**).
- **F_Lite** – the **PDF-XChange Lite V10** printer and its components.
- **F_Langs_Lite** – the files that allow the language localization of the **PDF-XChange Lite V10** print driver and its components.
- **F_ShellExt** – the Windows Explorer and Windows shell extensions. This has multiple features including the viewing of thumbnails, properties, previews and the inclusion of the **IFilter** component.
- **F_Updater** – the updater for **PDF-XChange** products. The updater checks automatically for updates to the software.
- **F_KeyInstaller** – the key installer for **PDF-XChange** applications.

A comprehensive list of properties defined by the **Windows** installer is available **here.**

Product Specific Properties

INSTALLLOCATION

This property specifies the installation folder.

Syntax

INSTALLLOCATION=<installation folder>

SET_AS_DEFAULT

If this property is unspecified, or specified with value of "1", then **PDF-XChange Editor** will be set as the default application for PDF files.

Syntax

SET_AS_DEFAULT="0"

PNAME

This property specifies the printer name. The default value is "PDF-XChange Lite V10."

Syntax

PNAME=<printer name>

SET_LITE_AS_DEFAULT

If this property is unspecified, or specified with a value of "1", then the **PDF-XChange Lite V10** printer will be set as the default system printer.

Syntax

SET_LITE_AS_DEFAULT="0"

VIEW_IN_BROWSERS

If this property is unspecified, or specified with a value of "1", then **PDF-XChange Editor** will be configured to open PDF files inside browsers.

Syntax

VIEW_IN_BROWSERS ="0"

DESKTOP_SHORTCUTS

If this property is unspecified, or specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is unspecified, or specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

This property specifies the username to which applications will be registered.

Syntax

USERNAME=<username>

ORGANIZATION

This property specifies the organization name to which applications will be registered.

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault. See **here** [36] for further information.

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

This property specifies a language for **PDF-XChange Editor** and the **PDF-XChange Lite** printer. (This requires **F_Vlangs** in order to operate for **PDF-XChange Editor** and **F_Langs_Lite** to operate for **PDF-XChange Lite**). This property uses the "language culture name" to define languages. For example German is "de-DE". The **<id>** for target languages is available **here.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

NOUPDATER

If this property is unspecified, or specified with a value of "0", then the **PDF-XChange Updater** [55] will be installed. If specified with a value of "1" then the updater will not be installed. (Available from build 310).

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

If this property is unspecified, or specified with a value of "1", then the installer will add a task to the task scheduler to check for software updates.

Syntax

SCHEDULEUPDATER=<0>

MSI Installer Examples

- Install the software in quiet mode to the folder "C:\Program Files\My PDF Applications":

  ```
  msiexec /i EditorV10.x64.msi /quiet INSTALLLOCATION="C:\Program Files\My
  PDF Applications"
  ```

- Install the software in quiet mode to the default folder and specify the user license information:

  ```
  msiexec /i EditorV10.x64.msi /quiet USERNAME="John Doe"
  USERMAIL="abc@a.b.c" KEYFILE="\\UNC\path\to\xcvaultfile"
  ```

- Install only the software, in quiet mode, and the software updater:

  ```
  msiexec /i EditorV10.x64.msi /quiet ADDLOCAL="F_Viewer,F_Updater"
  ```

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

  ```
  msiexec /i EditorV10.x64.msi /qb APP_LANG=de-DE
  ```

- Install the software 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 also defined. **ADDLOCAL** is used, therefore only the features specified will be installed and **F_VLangs** must be specified separately:

```
msiexec /i EditorV10.x64.msi /qb
ADDLOCAL="F_Viewer,F_Plugins,F_Plugin_SP,F_OCRPlugin,F_VLangs,F_BrowserPlug
ins,F_IEPlugin" APP_LANG=de-DE
```

2.3   Switches for EXE Installers

Switches for EXE Installers

The EXE installers support both 32 and 64 bit versions of MS Windows. However, the Microsoft MSIN is not always compatible with a unified 32/64 bit installation. If there is any uncertainty about the details of the system onto which **PDF-XChange Editor** is being installed, then using the EXE installer is recommended. This is because it has the ability to identify the target computer's system architecture and install 32 or 64 bit binaries accordingly.

The command line for installation is: **PDFXVE10.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

The most useful EXE installation switches for **PDF-XChange Editor** are detailed below.
Please note that parameters are case sensitive. All available options are detailed **here.**

Install Options

/install

This switch installs or configures the product specified. It is the default setting.

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

This switch creates a complete local copy of the bundle in the directory.

Display Options
(Please note that the default settings display the UI and all prompts during installation).

/quiet

This switch determines that neither a UI nor prompts are displayed during installation.

/passive

This switch determines that a minimal UI and no prompts are displayed during installation.

Restart Options

/norestart

This switch suppresses any attempts to restart the computer on which the installation is taking place. The default setting is for the UI to prompt before restarts take place.

Logging Options

/log

This switch logs to a specific file. The default setting is for a log file to be created in %TEMP%. This is also the case if the path is not specified.

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

This property specifies the organization name for which applications are registered.

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

SET_AS_DEFAULT

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.

Syntax

SET_AS_DEFAULT="0"

VIEW_IN_BROWSERS

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.

Syntax

VIEW_IN_BROWSERS="0"

APP_LANG

This property specifies a language for **PDF-XChange Editor** and the **PDF-XChange Lite** printer. This property uses the "language culture name" to define languages. For example German is "de-DE". The **<id>** for target languages is available **here.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

DESKTOP_SHORTCUTS

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.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

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.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault. See **here** 36 for further information.

Syntax

KEYFILE=<path to xcvault file>

NOUPDATER

If this property is not specified, or is 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. (Available from build 310).

Syntax

NOUPDATER="0"

EXE Installer Examples

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

  ```
  PDFXVE10.exe /quiet
  ```

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

  ```
  PDFXVE10.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYFILE="C:
  \license\V10Pro.xcvault"
  ```

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

  ```
  PDFXVE10.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYDATA="PVP60
  - ZJ2J77DN5kdBuQRhj ... dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

2.4　　Licensing

Licensing

The **PDF-XChange** licensing system offers both the standard serial key method of licensing applications as well as the option of using a license file.

Adding and Activating Your Serial Key in PDF-XChange Editor

When an evaluation copy of **PDF-XChange Editor** is being used all output is generated with two watermark stamps on each page. When a license key has been purchased the serial number provided must be entered into the software to ensure that all subsequent output is free of the evaluation watermarks. (Instructions on how to remove trial watermarks after you have added your license key are available **here**). You will receive a license key immediately after making a purchase of a **PDF-XChange Editor** license. This license key is included in the purchase order receipt and can also be accessed via your user account located **here.** Follow the steps below to add and activate your license key:

1. Open **PDF-XChange Editor,** then click the **Edit** tab and click **Preferences:**
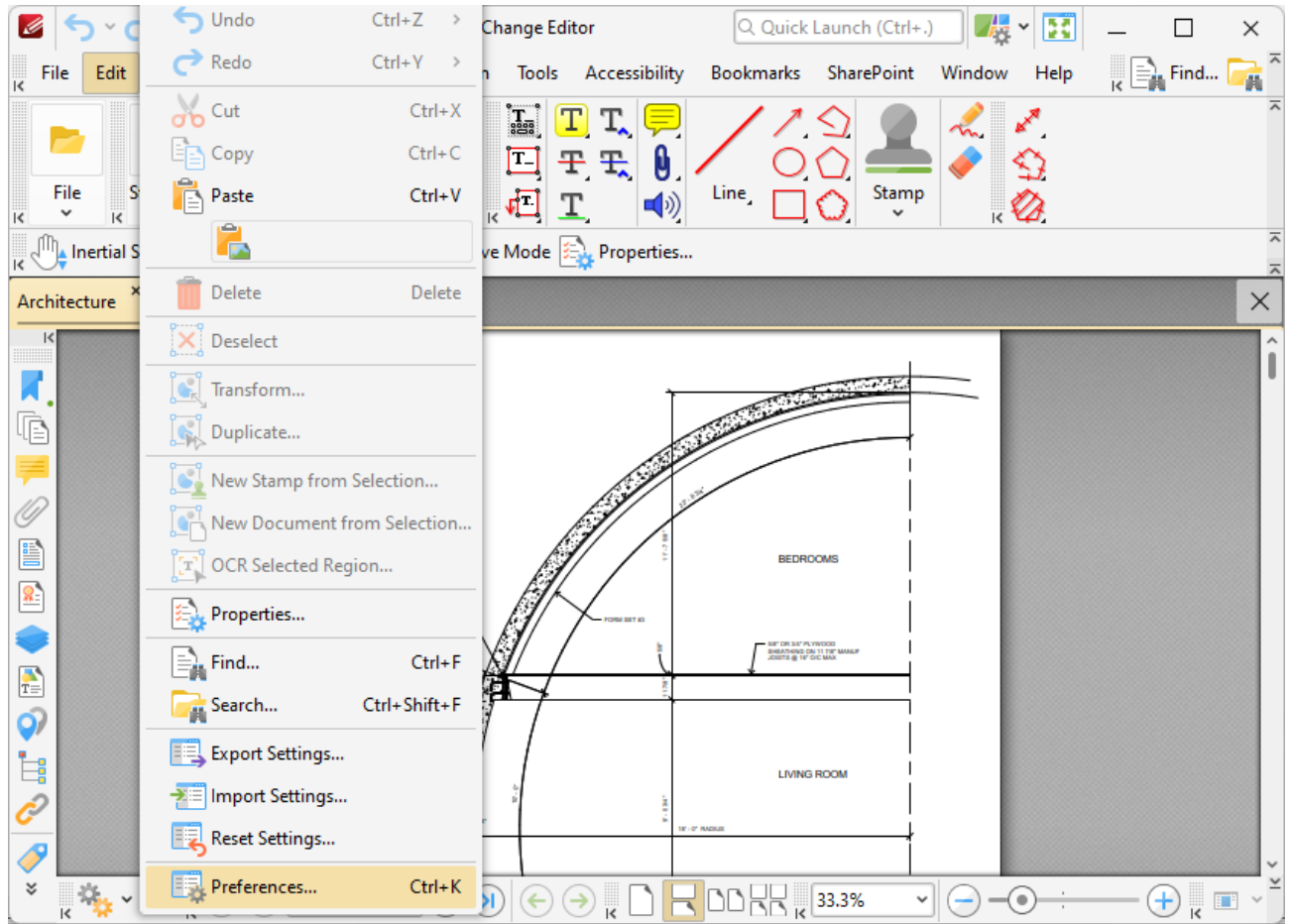
Figure 1. File Tab, Preferences Highlighted

The **Preferences** dialog box will open.

2. Click the **Registration** category in the list of categories on the left. The **Registration** options will be displayed:
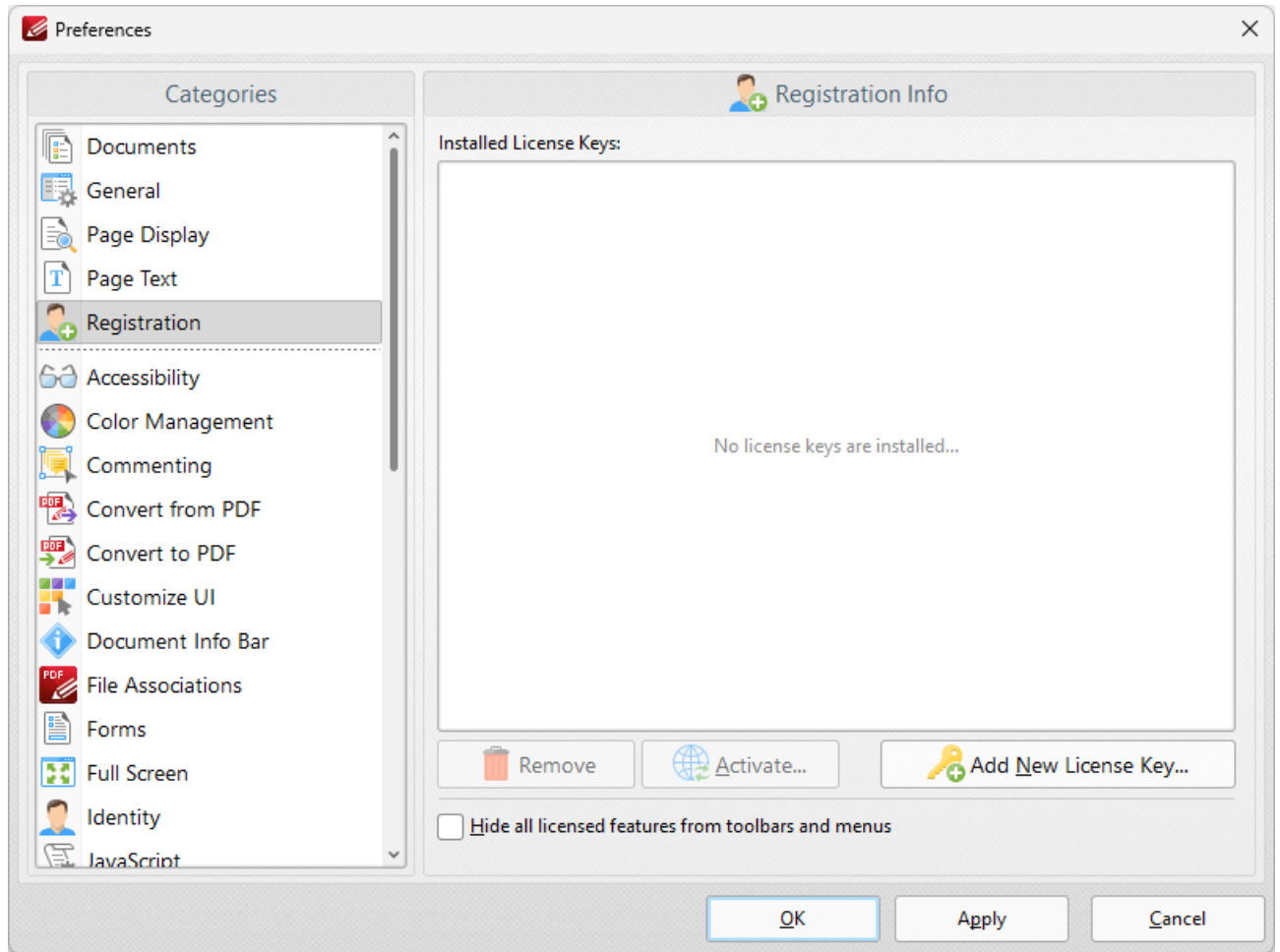
Figure 2. Preferences Dialog Box, Registration Preferences

3. Click **Add New License Key** to add your license key to the software. The **Add New License Key/Activation Code** dialog box will open:
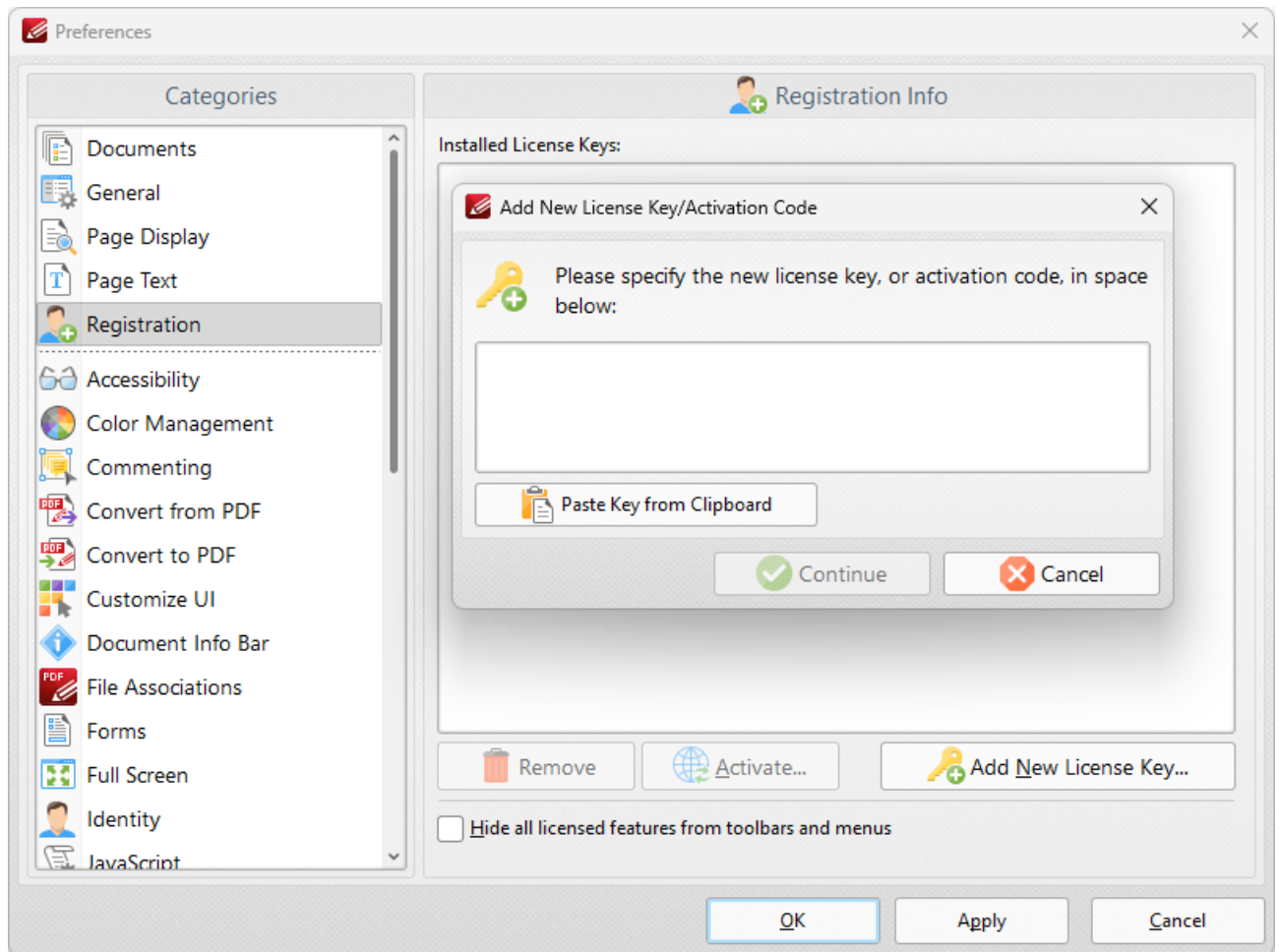
Figure 3. Add New License Key/Activation Code Dialog Box

4. Paste your license key into the dialog box and then click **Continue** to add the key.

5. Click **Activate** in the **Registration** preferences dialog box to activate your key:
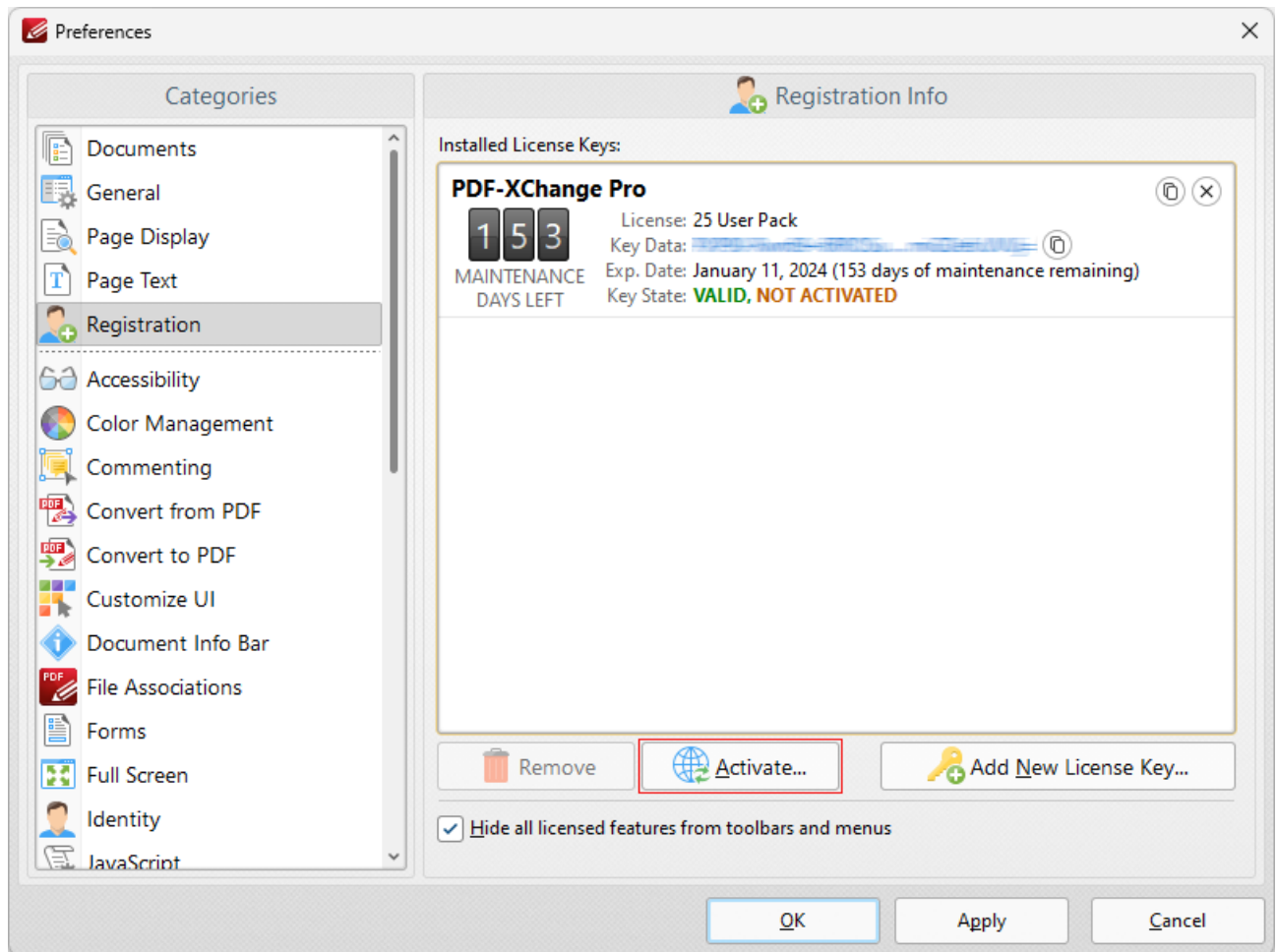
Figure 4. Preferences Dialog Box, Registration Preferences, Activate Button Highlighted

You can then select to either **Activate via Internet,** which is the recommended option as it takes a matter of seconds to complete, or to **Activate Manually (Offline),** which is intended only for machines that do not have an internet connection.

Using a License File to Add Your Serial Key to PDF-XChange Editor

The main benefit of this feature is that it avoids the need to reinstall the software if you are using an evaluation version and intend to upgrade. Follow the steps below to access and activate license (.xcvault) files:

1. Login to your account with **PDF-XChange.**

2. Move to the "**Your Products and Serial Keys**" tab.

3. Move to the desired product and click the arrow icon indicated below, which will expand the window:
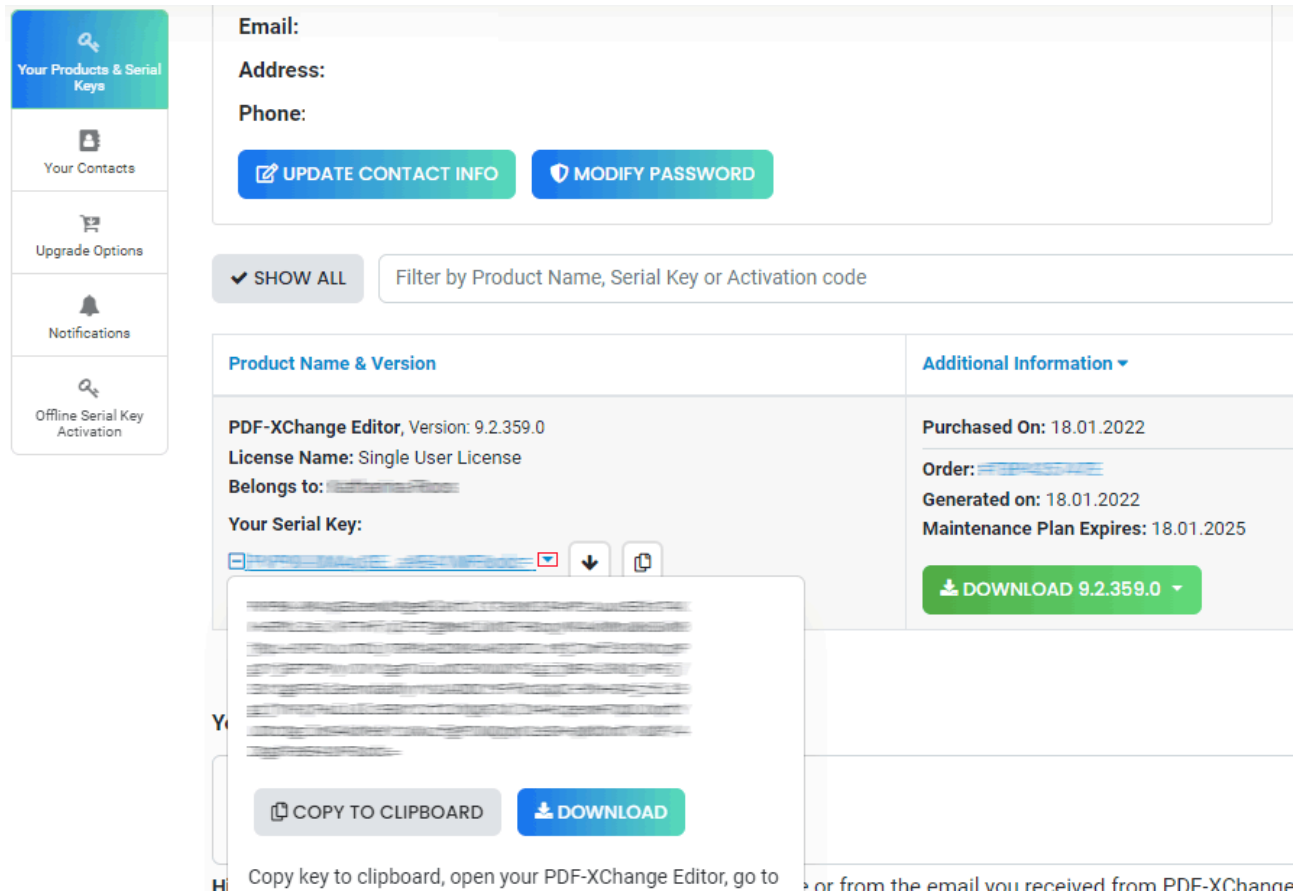
Figure 5. XCVault File Access Point

4. Click the **Download** button. The .xcvault file will then download.

5. 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. The command line for operation is: **XCVault.exe /Option <path_to_xcvault_file>.** Available command line options are detailed below:

See **here** for information about management of licenses for **PDF-XChange Editor** on Windows Terminal Servers.

XCVault Command Line Options

/Install

This command designates the utility as the default handler of **.xcvault** files in the system. Please note that this requires administrative rights.

Example

```
xcvault.exe /Install
```

/AddKeys

This command installs all keys from **.xcvault** files.

Syntax

xcvault.exe [/AddKeys] <xcvault_file> [/M|/S|/R]

/M – specifies that new keys are added in the **HKEY_LOCAL_MACHINE** registry section and administrative rights are required.

/R – specifies that new keys will be unencrypted when added. Please note that this does not affect existing keys.

/S – specifies that the command is not permitted to show error/information messages.

Examples

```
xcvault.exe /AddKeys "c:\Personal.xcvault"
```

```
xcvault.exe "c:\Personal.xcvault"
```

/AddKeyData

This command installs the specified key.

Syntax

xcvault.exe [/AddKeyData] <keystring> [/M|/S|/R]

/M – Installs key into HKLM for per-machine use. This option requires administrative rights. If this option is not specified then key will be installed in HKCU for per-user use and administrative rights are not required.

/S – specifies that the command is not permitted to show error/information messages.

/R – specifies that new keys will be unencrypted when added. Please note that this does not affect existing keys.

Example

```
xcvault.exe /AddKeyData <keystring>
```

/OpenKeys

This command stores all keys in an open form, instead of encrypting them by machine-specific ID. This option is useful for terminal servers that have a load-balancing and/or VDI environment.

Syntax

xcvault.exe /OpenKeys [/M|/S]

/M – decrypts keys only in the per-machine store (HKLM). This option requires administrative rights. If it is not specified then the keys will be changed only in the per-user store (HKCU).

/S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /OpenKeys
```

/ProtectKeys

This command is the opposite of the "OpenKeys" command:

Syntax

xcvault.exe /ProtectKeys [/M|/S]

/M – encrypts keys only in the per-machine store (HKLM). This option requires administrative rights. If it is not specified then the keys will be changed only in the per-user store (HKCU).

/S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /ProtectKeys
```

/ActivateKeys

This command activates installed keys.

Syntax

xcvault.exe /ActivateKeys [/S|/AA]

/S – specifies silent mode and suppresses any messages with information about results.

/AA – specifies that currently activated keys will be reused in the activation process.

Example

```
xcvault.exe /ActivateKeys
```

/RemoveKeys

This command removes all license keys for all products from the per-user store (HKCU). If the per-machine store (HKLM) is available for modification then all keys will be removed from it, otherwise keys from this store will be marked as removed for only the current user.

Syntax

    xcvault.exe /RemoveKeys [/S|

    /S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /RemoveKeys
```

/Cleanup

This command removes all license-related information for all installed products from per-machine (HKLM) and per-user (HKCU) stores. If the per-machine store is not empty then administrative rights are required.

Syntax

    xcvault.exe /Cleanup [/S|

    /S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /Cleanup
```

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.

Passing License Details During Installation

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. The command line can be used to resolve this issue and there are two methods available:

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="PXP70-Y5EN....cFrBqnyKhv7eOw=".

The first method is recommended as the new keys are very complex and therefore less suited to being passed as strings at the command line. The details of these switches and examples of their use are available **here.** [26]

2.5 End User License Agreement

End User License Agreement

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Last amended date: June 14, 2023

2.6   The PDF-XChange Updater

 The PDF-XChange Updater

The **PDF-XChange Updater** is used to check for and download updates to **PDF-XChange Editor.** Click **Check for Updates** in the **Help** tab to open the **PDF-XChange Updater:**
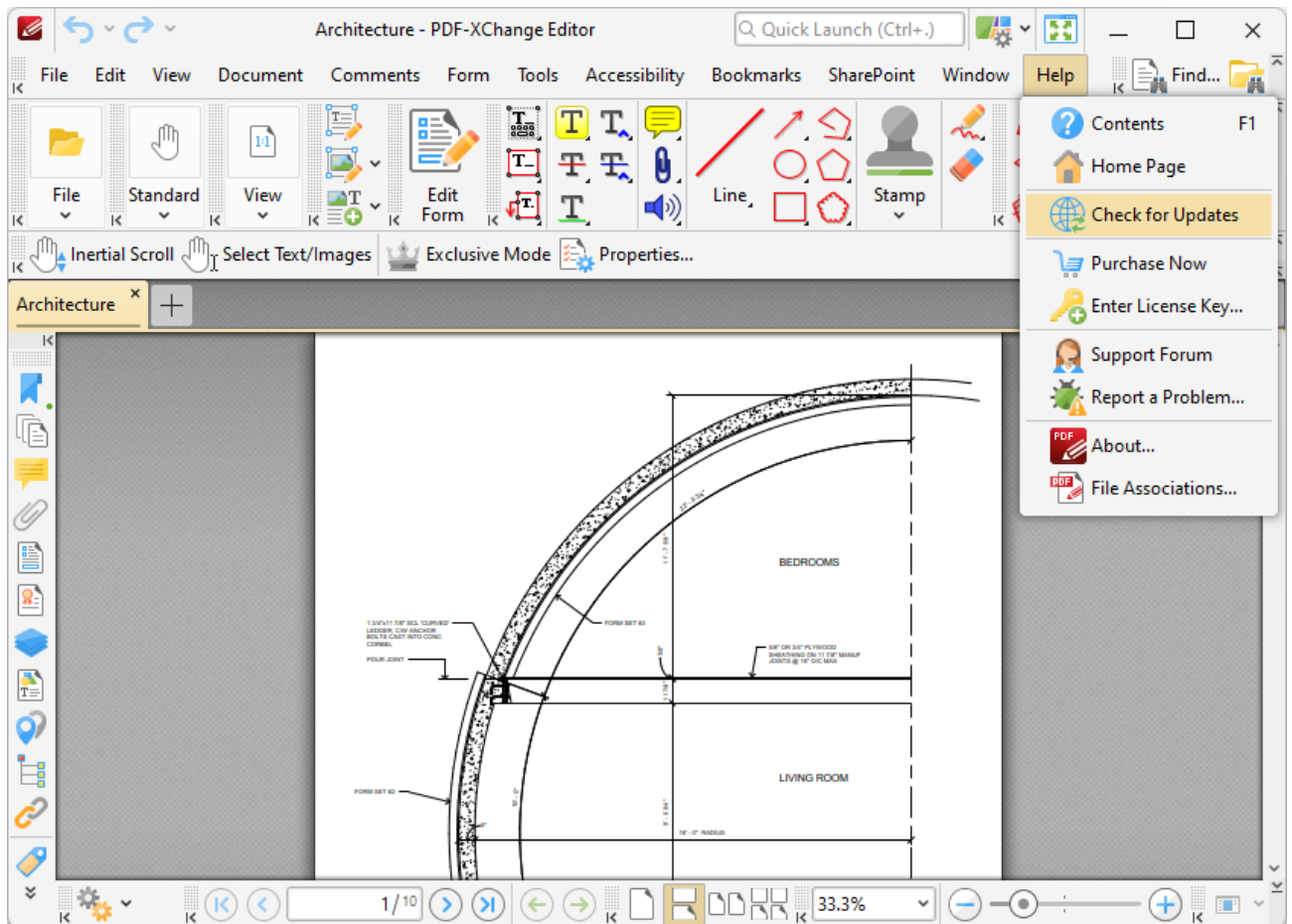
Figure 1. Help Tab, Check for Updates

The **PDF-XChange Updater** dialog box will open:
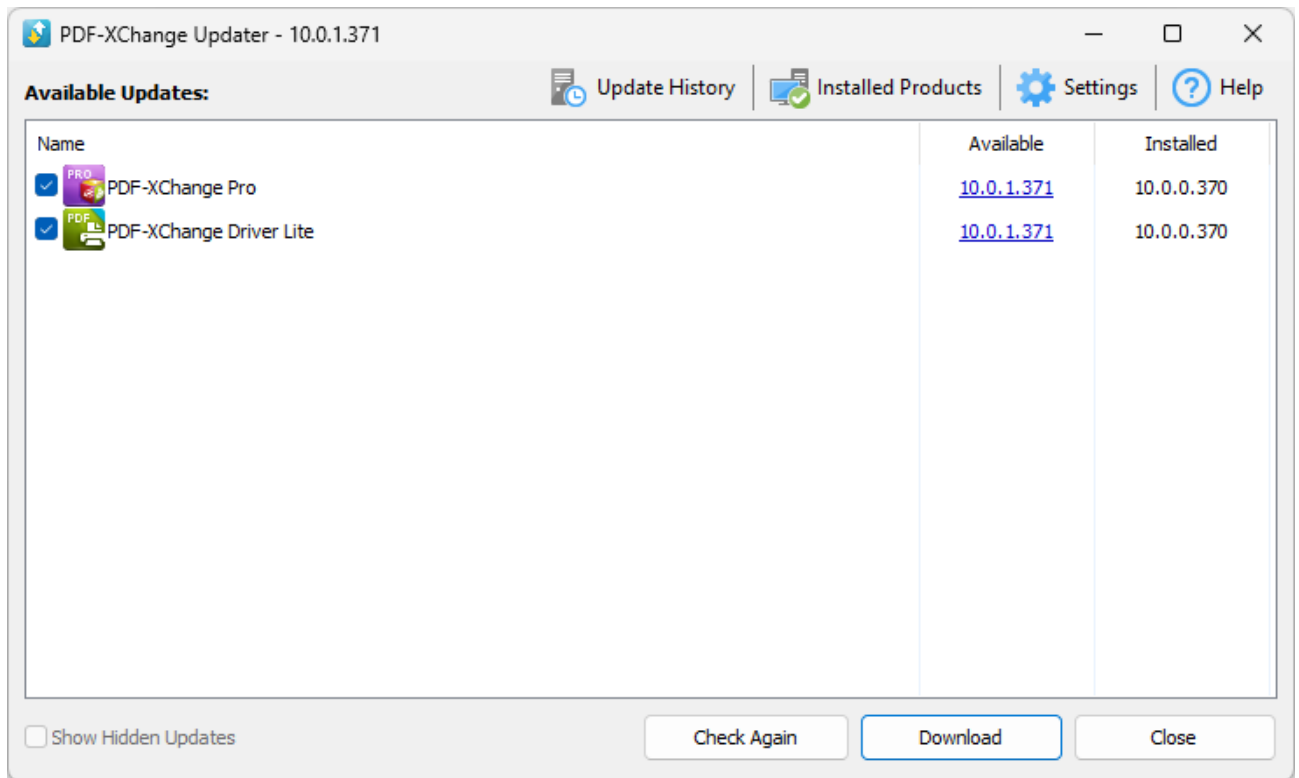
Figure 2. PDF-XChange Updater Dialog Box

- Available updates are displayed in the main window. Click the **Download** button to download and install available updates.
- Click **Update History** to view a breakdown of recent updates.
- Click **Installed Products** to view a breakdown of installed products from **PDF-XChange.**
- Click **Settings** to customize settings for the **PDF-XChange Updater.** These options are detailed beneath *(figure 3)* below.
- Click **Help** to launch the online help for the **PDF-XChange Updater.**
- Select/clear the **Show Hidden Updates** box to show/hide hidden updates.
- Click **Check Again** to check for more recent updates.
- Click **Close** to close the **PDF-XChange Updater** dialog box.

Settings
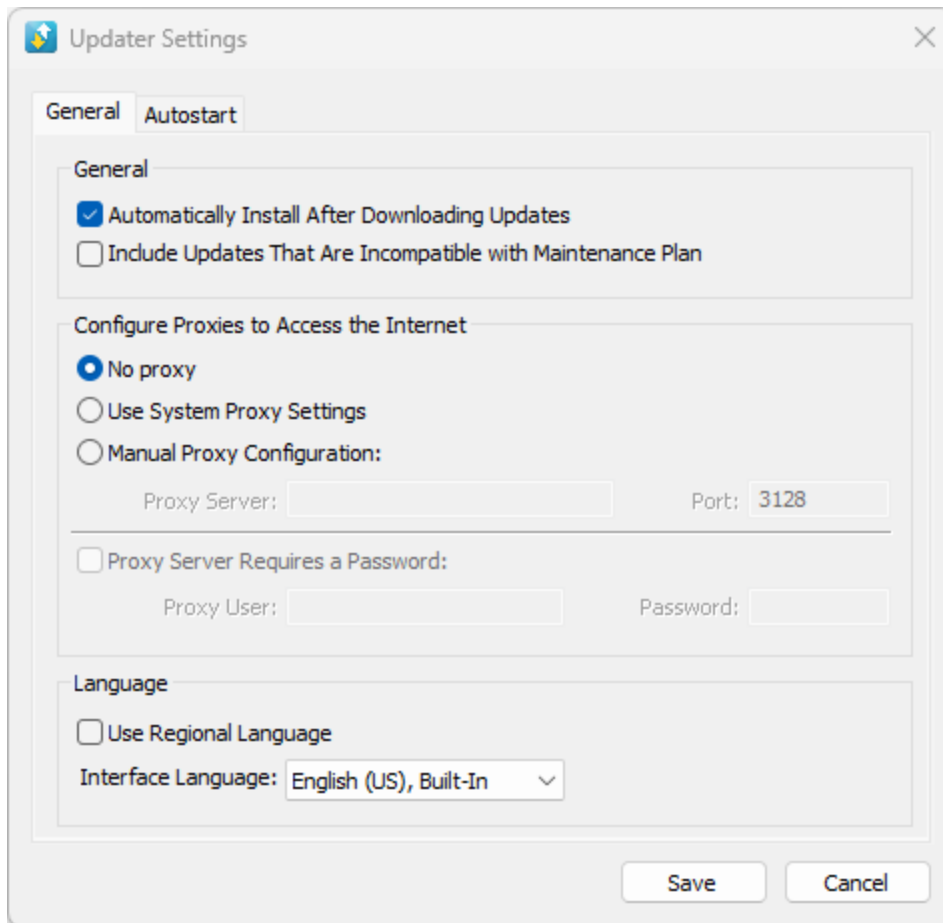
Figure 3. Updater Settings Dialog Box

- Select/clear the **Automatically Install After Downloading Updates** box to enable/disable the automatic installation of downloaded updates.
- Select/clear the **Include Updates That Are Incompatible with Maintenance Plan** box to include/exclude products that are not included in your current maintenance plan. Note that if updates are listed here and your license has expired, then the software will revert to evaluation mode when the updates are downloaded.
- Select an option in the **Configure Proxies to Access the Internet** section to determine the proxy that the updater uses to access the internet:
    - Select **No Proxy** to disable the use of a proxy to access the internet.
    - Select **Use System Proxy Settings** to use the current system proxy settings to access the internet.
    - Select **Manual Proxy Configuration** to use a custom proxy, then enter the **Proxy Server** and **Port** number details in the text boxes.
- Select the **Proxy Server Requires a Password** box to set a password for the use of **Proxy Server** when the **Manual Proxy Server** option above is used, then enter the **Proxy User** and **Password** details in the text boxes.

- Select the **Use Regional Language** box to use the regional language as the interface language for downloaded updates, or select a different option from the dropdown menu. Note that the language of the user interface can be subsequently changed as desired in the user preferences.
- Click **Save** to save settings.

Autostart

Use the **Autostart** tab to set a schedule for automatically checking for updates to the software:
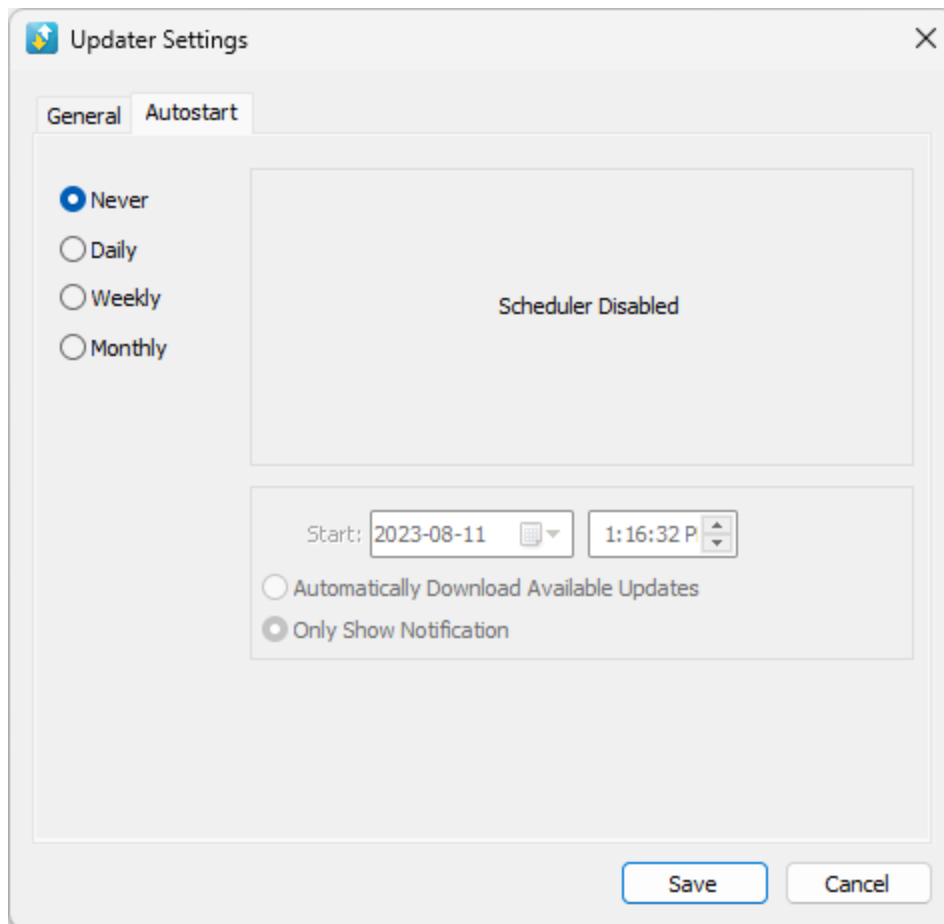
Figure 4. Updater Settings Dialog Box, Autostart Tab

- Select **Never** to disable this feature.
- Select **Daily, Weekly** or **Monthly** to check for updates automatically on a daily, weekly or monthly basis as desired. Note that different scheduling options are available depending on which option is used.
- Use the **Start** text box to determine the date and time at which the schedule starts.
- Select **Automatically Download Available Updates** to download available updates automatically, or select **Only Show Notification** to receive a notification that updates are available instead.

Click **Save** to save settings.

3 Features Overview

Features Overview

The main feature categories of **PDF-XChange Editor** are detailed below:

Accessibility Features:

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Enhance Documents:

- **Add Backgrounds to Documents.** 640
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- **Add/Remove Watermarks.** 637
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Integrate Cloud-Based Services:

- **Open Documents from Box.com.** 88
- **Open Documents from Dropbox.** 88
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- **Open Documents from OneDrive.** 88
- **Open Documents from SharePoint.** 88

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
- **Add Images to Documents.** 839
- **Add/Remove Bates Numbering.** 643
- **Add/Remove Headers and Footers.** 633
- **Autoscoll through Documents.** 607
- **Calibrate Measurement Scales.** 986

- **Create Number Ranges.** 709
- **Crop Documents.** 674
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4 **Explore the User Interface**

Explore the User Interface

The **PDF-XChange Editor** user interface appears as below:
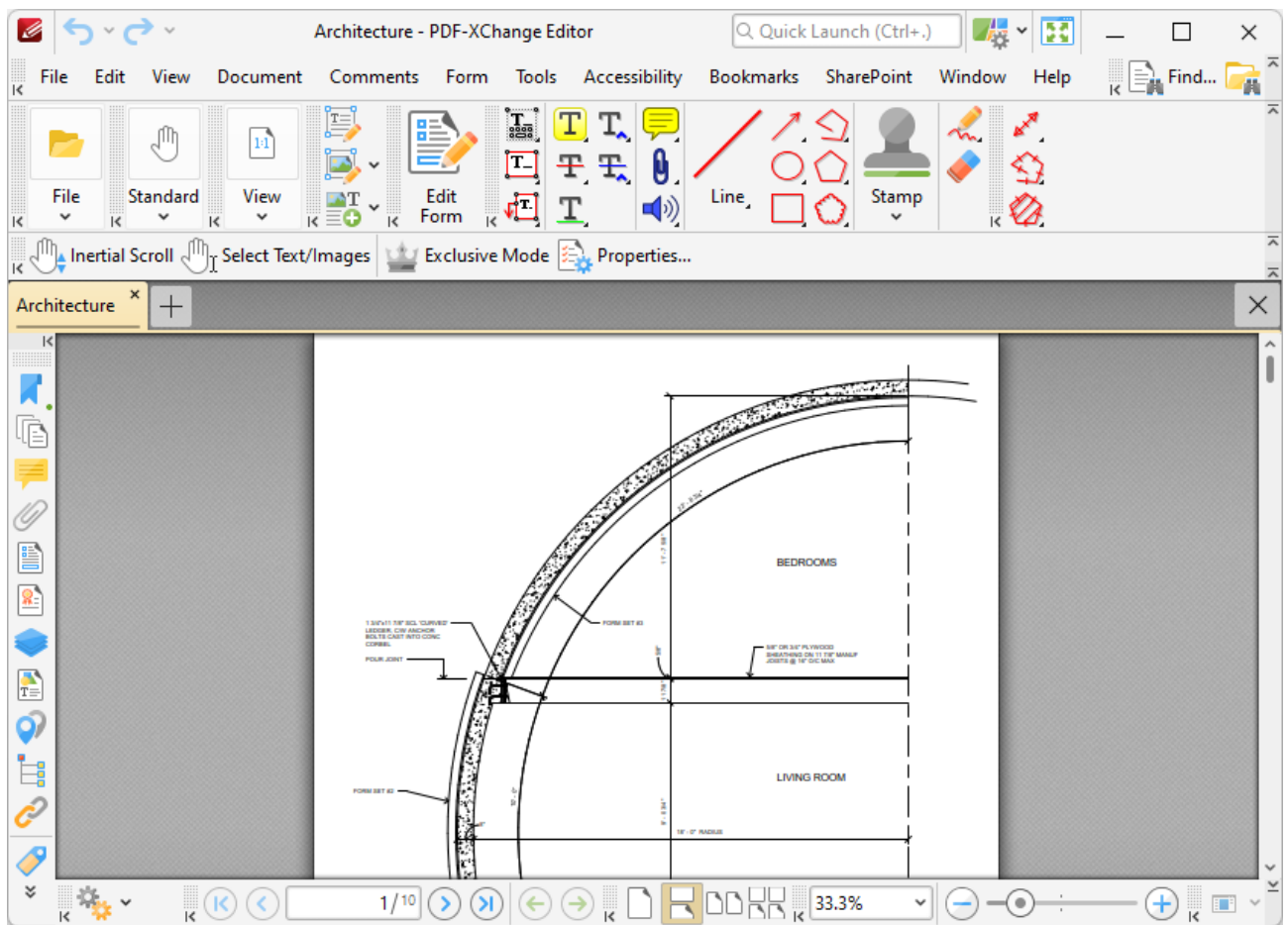
Figure 1. PDF X-Change Editor User Interface

The **Menu Toolbar** is located at the top of the window and composed of eleven tabs:
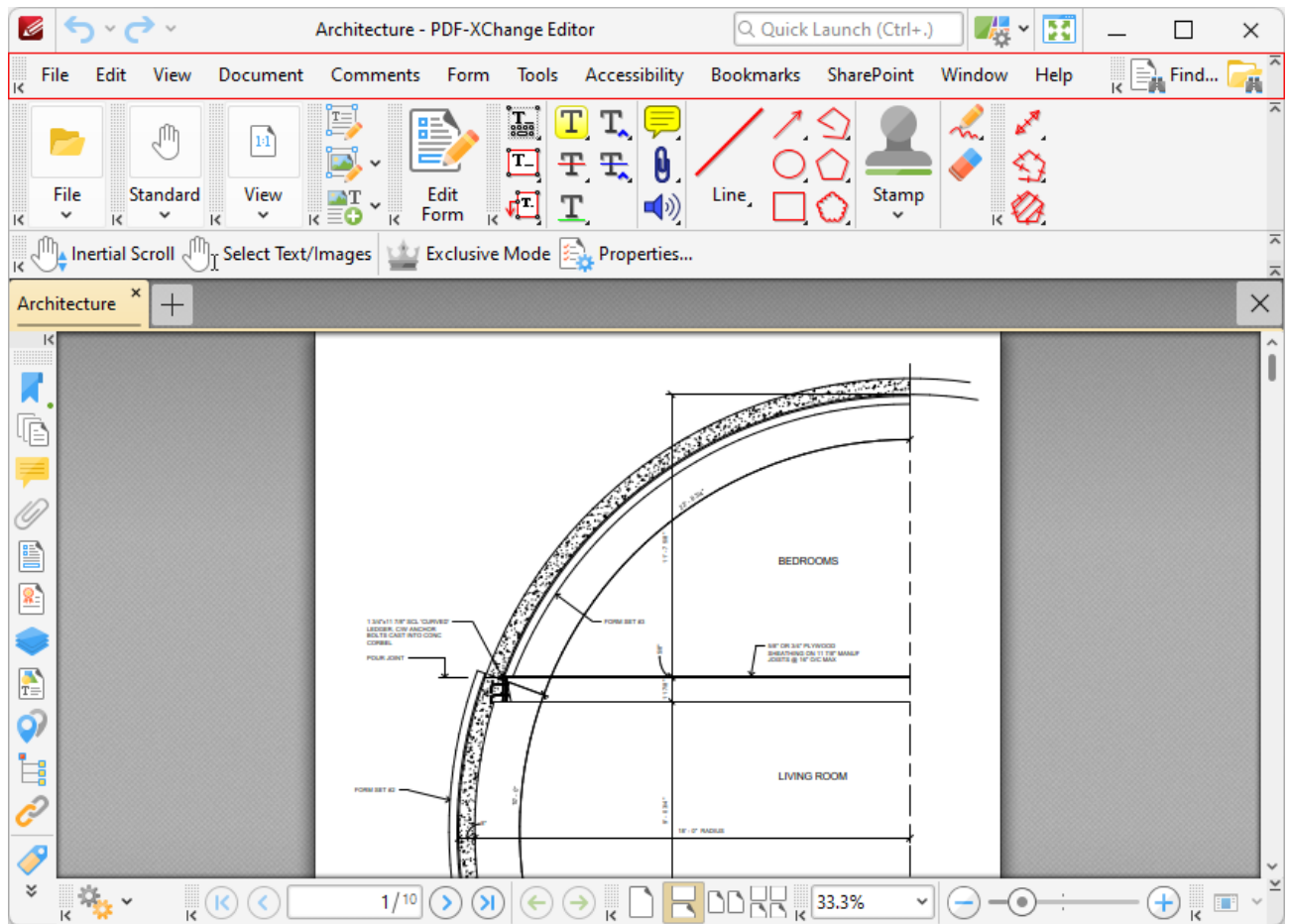
Figure 2. Menu Toolbar

Click the links below to view the options and functionality of each tab:

- **File** [86] contains file-level operations such as open, close, save and print documents.
- **Edit** [203] contains editing options such as cut, copy, paste and delete selected content.
- **View** [312] contains options that determine what is displayed in the main window such as toolbar shortcuts and editing panes. Document layout options are also available in this tab.
- **Document** [631] contains document editing options such as add/remove watermarks, edit backgrounds, crop pages and digital signature options.
- **Comments** [773] contains options for editing document comments, such as converting comments to base content, importing/exporting comments and creating a comment summary.
- **Form** [793] contains options for managing, highlighting and creating document form fields such as radio buttons, dropdown menus and barcodes.
- **Tools** [803] contains submenus of the **PDF-XChange Editor** tools, which can be used to manipulate, edit and annotate documents.
- **Bookmarks** [1042] contains options that relate the creation and management of document bookmarks.

- **SharePoint** 1091 contains options that relate to files associated with the **Microsoft Office SharePoint Server.**
- **Window** 1096 contains options that relate to the display of the main window.
- **Help** 1098 contains links to software assistance, such as the **PDF-XChange** main website and user-forum.

The **Menu Toolbar** can be repositioned as desired. Hover the pointer over the grid of dots on the left side the of the **Menu Toolbar** to reposition it. The pointer will change from a standard icon to an icon with four arrows. Click and hold the **Menu Toolbar** to reposition it. Press F9 to show/hide the **Menu Toolbar.** It is also possible to customize the **Menu Toolbar,** as detailed **here.** 492

There are also some options in the space immediately above the **Menu Toolbar:**
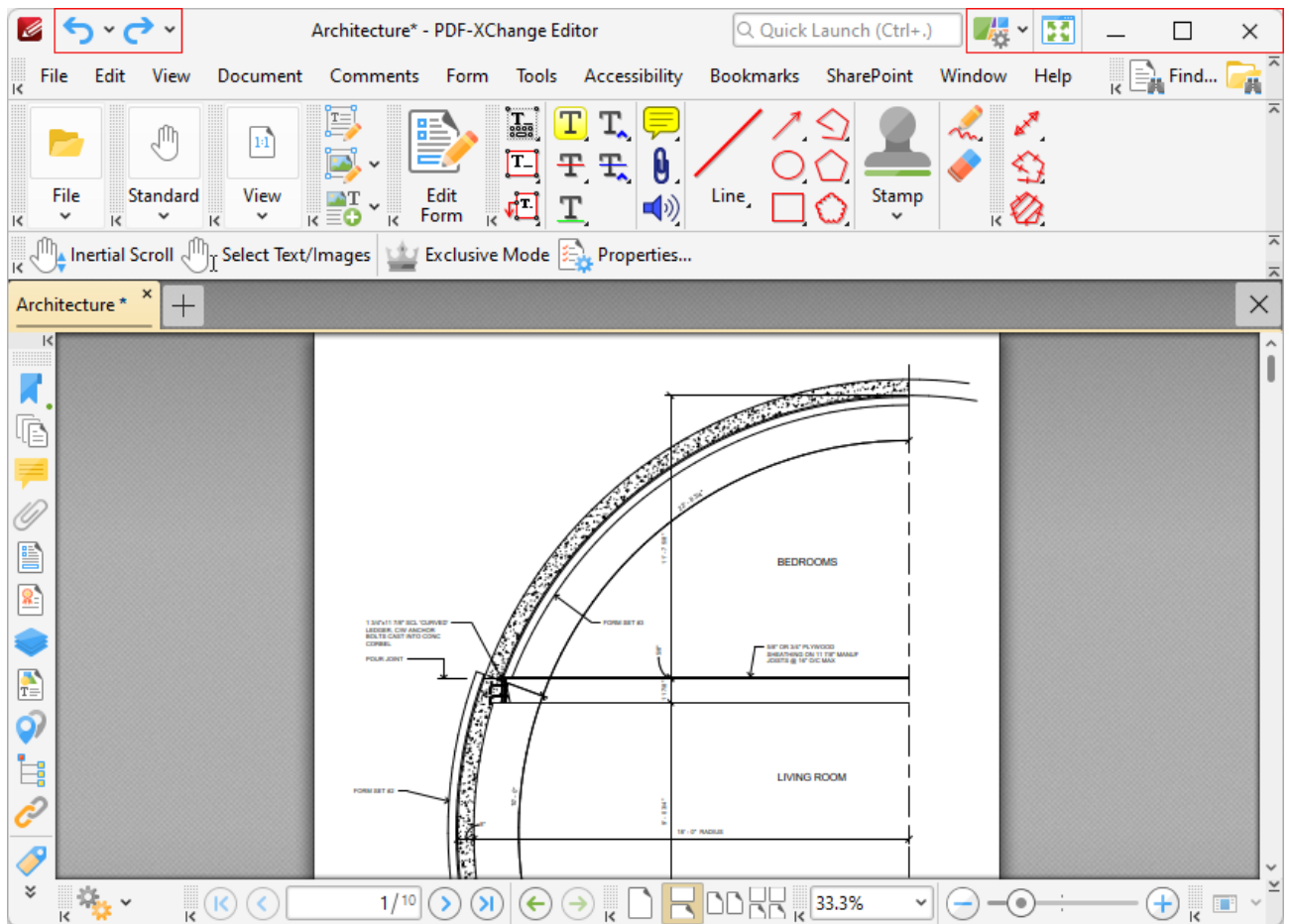
Figure 3. Additional UI Options

- Click ↶ **Undo** to undo the most recent editing action.
- Click ↷ **Redo** to reverse the most recent undo action.
- Click 🔍 **Find** to activate the **Find** 215 function and locate specified text in the active document.

- Click 🔍 **Search** to open the **Search** 217 pane and search documents open in **PDF-XChange Editor** or folders on the local computer.
- Click ⊞ **Full Screen Mode** to view the active document in full screen mode.
- Click 🔍 **Quick Launch** to find and launch commands in **PDF-XChange Editor -** enter search terms in the text box and then click search results to activate them.
- Click ⚙ **UI Options** to toggle between the options for the display of the user interface:
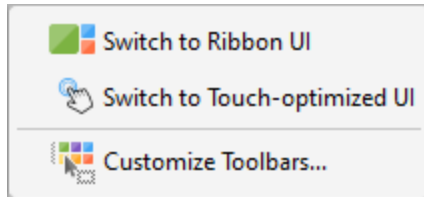
Figure 4. UI Options

- Click **Switch to Ribbon UI** to switch to the ribbon layout:
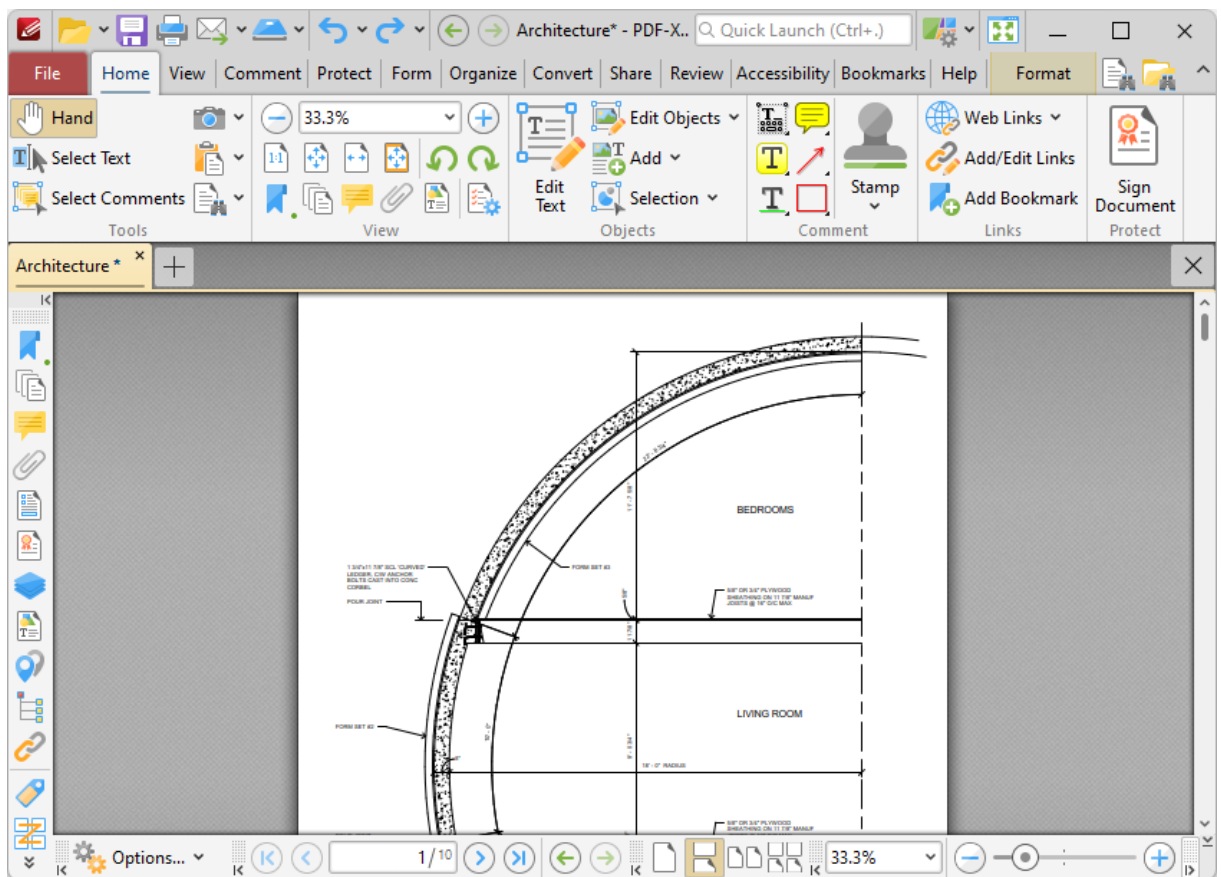
Figure 5. Ribbon UI Layout

The ribbon layout utilizes contextual tabs instead of menus and submenu items. This means that the submenu items displayed in the classic UI layout are displayed instead as icons in the user interface, which eliminates the need for several parallel toolbars and streamlines

the use of **PDF-XChange Editor.** The layout of the features and functionality in the ribbon UI varies from the classic UI. The ribbon UI version of the manual for **PDF-XChange Editor** is available **here.**

- Click **Switch to Touch-optimized UI** to switch from **Mouse-optimized UI** to **Touch-Optimized UI** and vice versa. The **Touch-optimized UI** features larger icons and is intended for use in conjunction with tablets, smartphones and similar devices. When the **Touch-Optimized UI** is enabled you can use single/double taps in the place of singe/double mouse clicks in standard UI mode, and you can tap-and-hold to open context menus. Additional options for customizing the touch UI are available in the commenting preferences detailed **here.** 250
- Click **Customize Toolbars** to customize the layout of toolbars, the commands that they contain and their display/locking options. See **here** 492 for further information.

The **Shortcut Toolbar** is located at the top of the main window:

Figure 6. Shortcut Toolbar

This toolbar contains several shortcuts to functions and tools within **PDF-XChange Editor:**

Click **File** to view file-level operations:
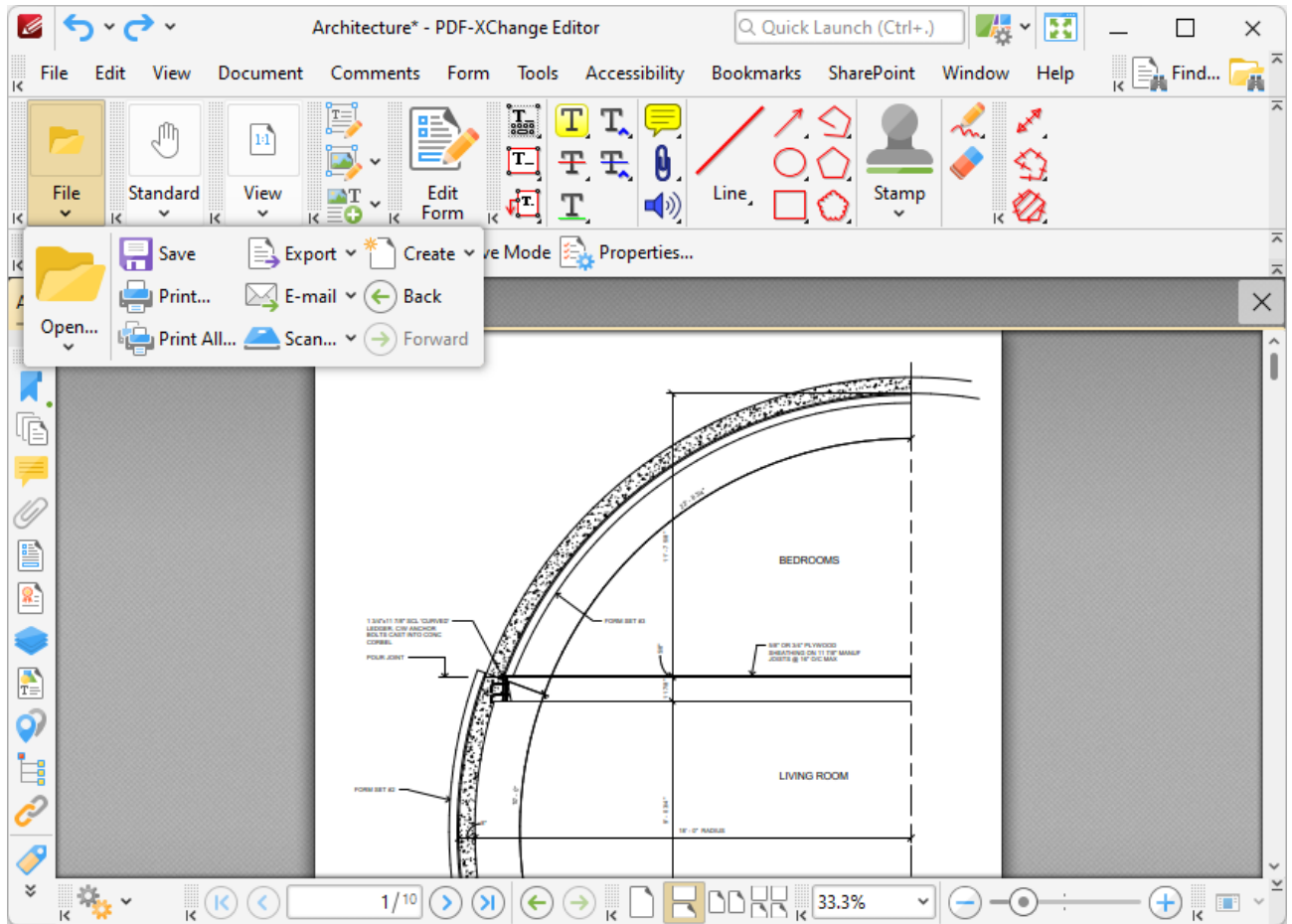
Figure 7. File Options

- Click **Open** to open files.
- Click **Save** to save the active document.
- Click **Print** to print the active document.
- Click **Print All** to print all open documents to a single document.
- Click **Export** to export a copy of the active document to image format, **Microsoft Word (*.doc/.docx)** format, **Microsoft Excel (*.xlsx)** format or **Microsoft Powerpoint (*.pptx)** format.
- Click **Email** to email the active document.
- Click **Scan** to create a new document from scanned material.
- Click **Create** to create a new document, as detailed **here.** 109
- Click **Back/Forward** to move to the previous/next document location.

Click **Standard** to view the most commonly-used tools:
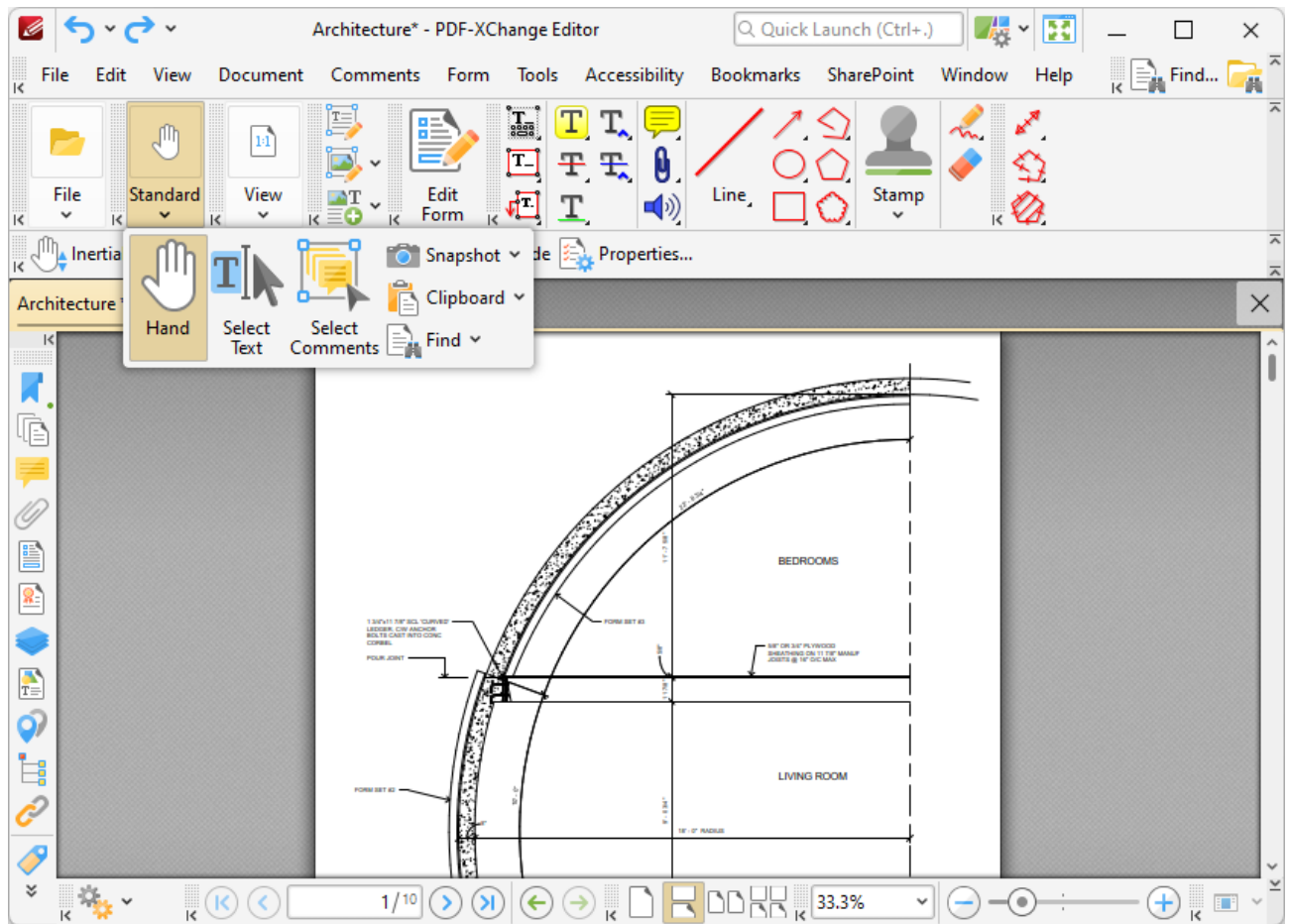
Figure 8. Standard Options

- Click **Hand** to activate the **Hand Tool,** which is used for simple document navigation. Click and drag the pointer to scroll through documents when the **Hand Tool** is enabled.
- Click **Select Text** to activate the **Select Text Tool,** which is used to select and edit document text.
- Click **Select Comments** to select and edit document comments, such as sticky note and shape annotations.
- Click **Snapshot** to activate the **Snapshot Tool,** which is used to capture document snapshots and copy them to the clipboard.
- Click **Clipboard** to interact with the current content of the clipboard.
- Click **Find** to launch the **Find** function, which is used to locate specified document text.

Use the options in the **View Toolbar** to manipulate the page view and enable the **Zoom Tools:**
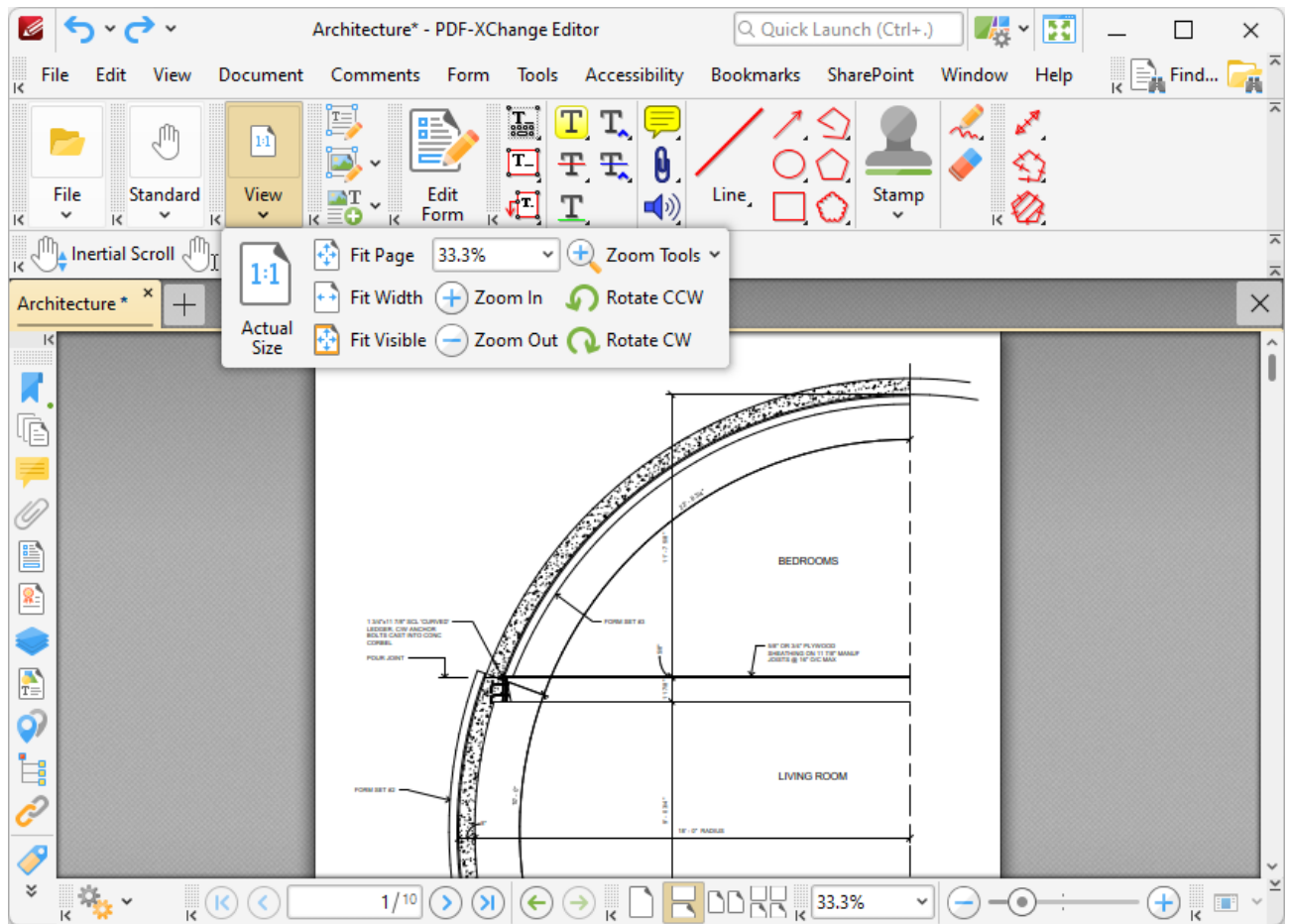
Figure 9. View Toolbar

- Click **Actual Size** to set the zoom level to 100% and view pages at their actual size.
- Click **Fit Page** ⊡ to fit the page length to the editing space of the user interface.
- Click **Fit Width** ⊡ to fit the page width to the editing space of the user interface.
- Click **Fit Visible** ⊡ to fit the page width to the editing space of the user interface and ignore white page margins.
- Click **Zoom In/Zoom Out** to zoom in on/out from the active document.
- Click **Zoom Tools** 🔍 to activate the **Zoom Tools:**
    - The **Zoom In/Out Tool** is used to zoom in on/out from the active document. The pointer becomes a magnifying glass icon when this tool is enabled. Move it to the desired location and then click to zoom. Hold down Ctrl and click to zoom out.
    - The **Loupe Tool** utilizes a zoom pane that magnifies page portions to assist in document editing. See **here** [817] for further information.
    - The **Pan and Zoom Tool** utilizes a zoom pane that enables dynamic page navigation. See **here** [820] for further information.
    - The **Continuous Zoom Tool** allows you to zoom in/out continuously. When this tool is enabled, click and hold the mouse button and then move the mouse up/down to scroll in/out.

- Click **Rotate CCW** to rotate the current view ninety degrees counter-clockwise.
- Click **Rotate CW** to rotate the current view ninety degrees clockwise.

Use the options in the **Edit Toolbar** to edit the base content of documents:
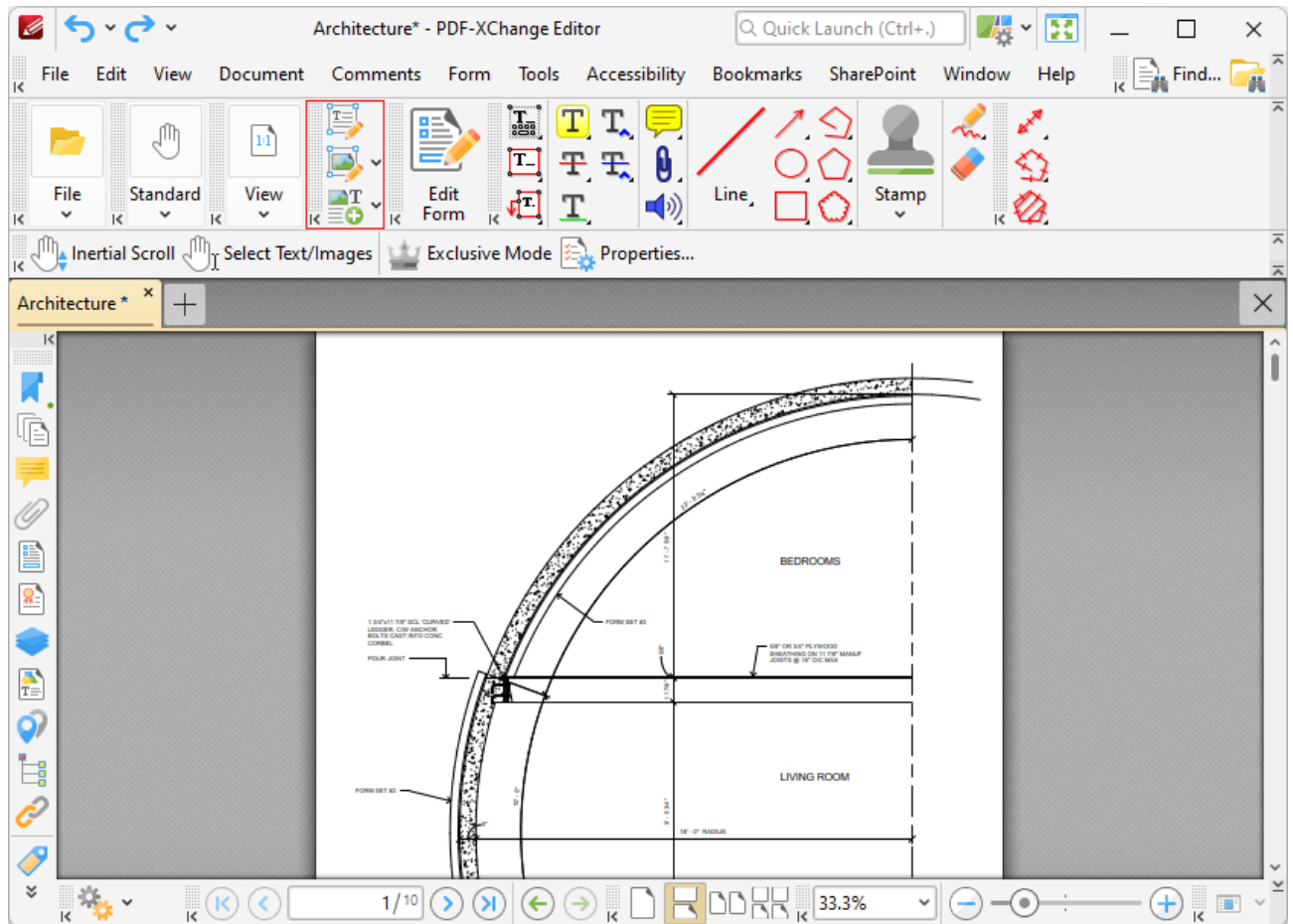
Figure 10. Edit Toolbar

- Click **Edit Text** to edit document text, as detailed **here.** [835]
- Click **Edit Objects** to edit the base content of documents, as detailed **here.** [824]
- Click **Add** to add **Text,** [835] **Images** [839] or **Barcodes** [842] to documents.

Click **Edit Form** to enable the **Form Toolbar:**
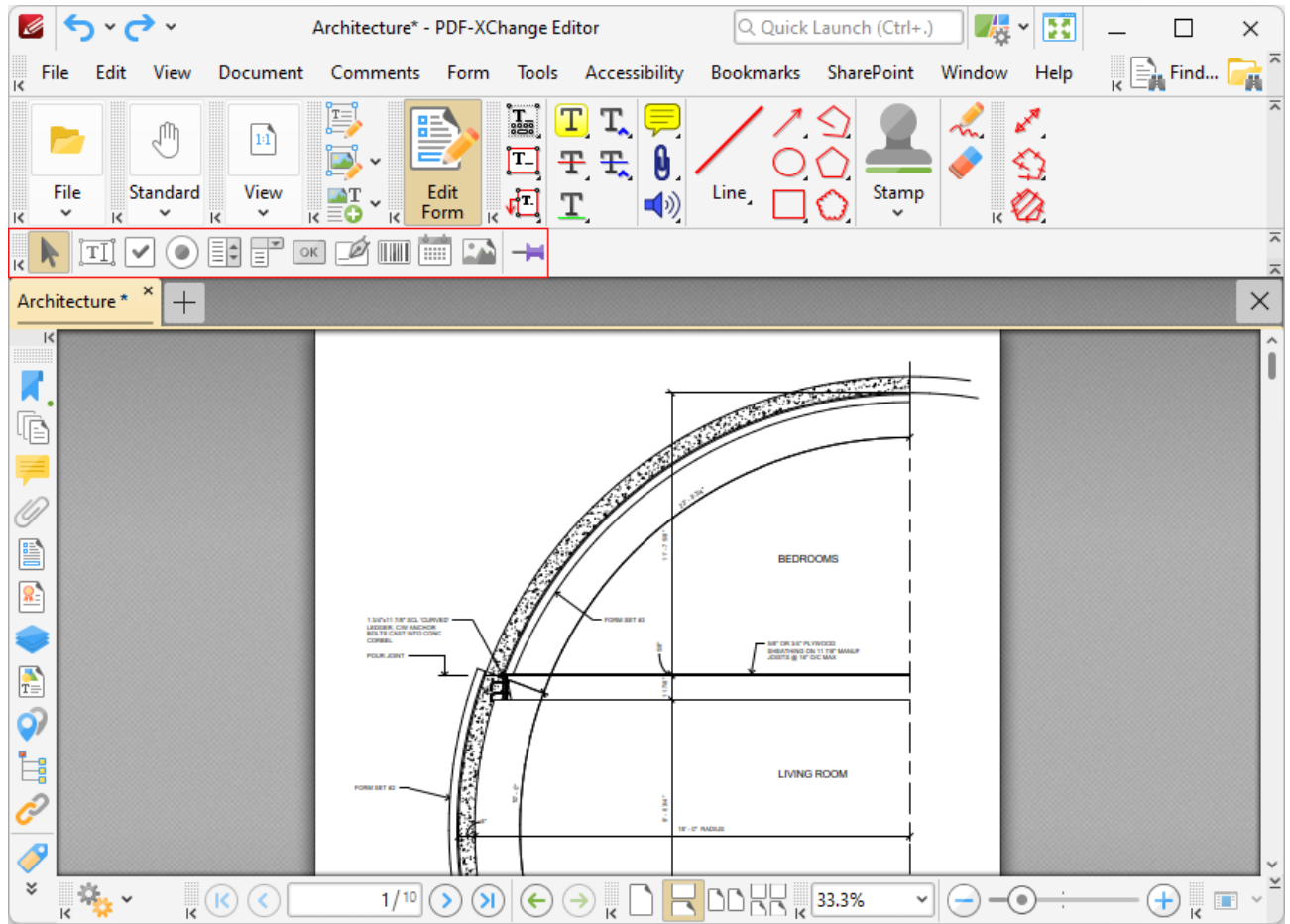
Figure 11. Edit Form Button and Form Toolbar

The options in the **Form Toolbar** are used to create/edit forms such as check boxes, digital signature fields and dropdown menus. See **here** 319 for further information.

Use the options in the **Comments Toolbar** to add comments and shape/stamp annotations to documents:
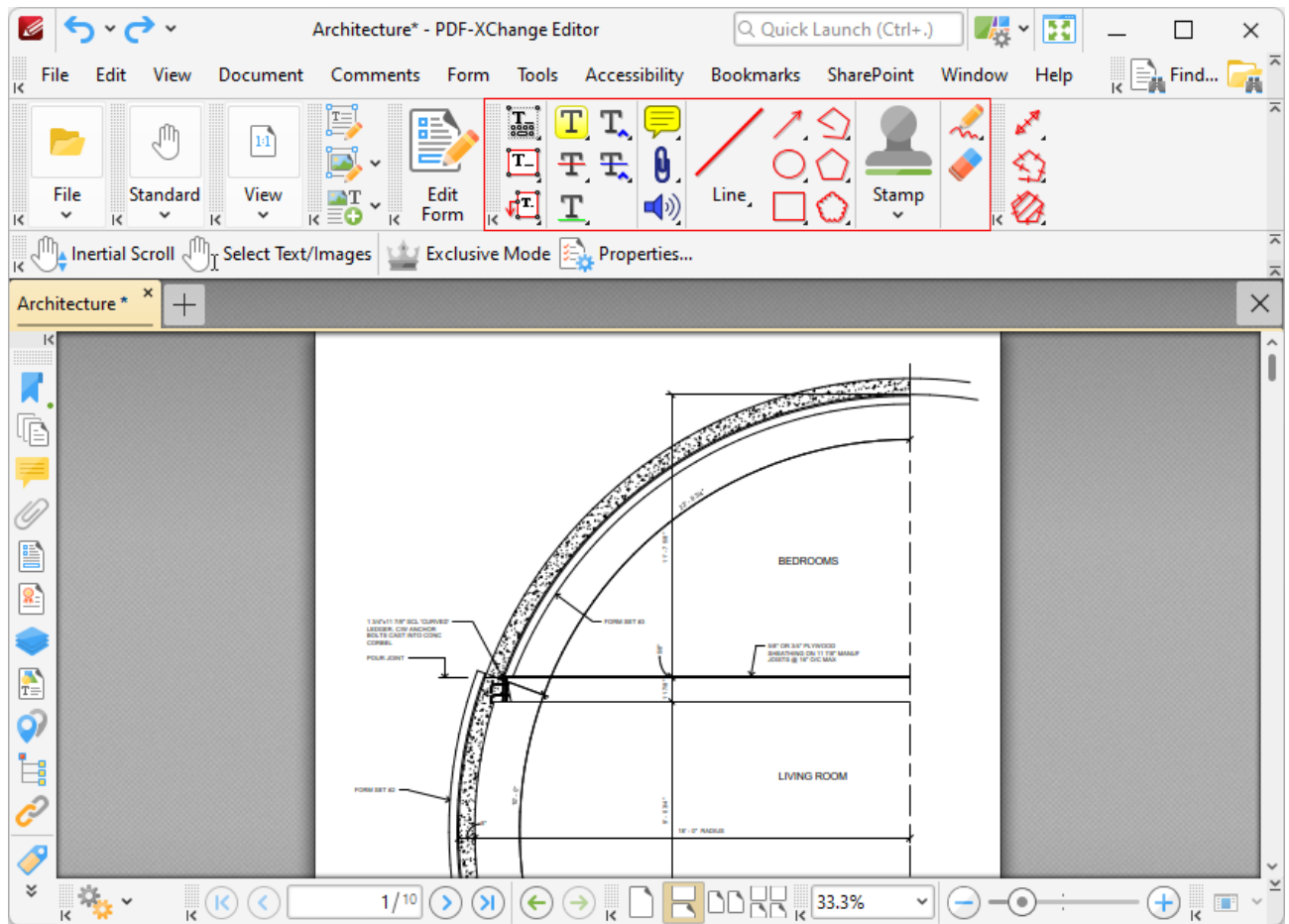
Figure 12. Comments Toolbar

- Click ![icon] **Typewriter Tool** to add typewriter-style comments to documents. See **here** 854 for further information.
- Click ![icon] **Text Box Tool** to add interactive text-box comments to documents. See **here** 859 for further information.
- Click ![icon] **Callout Tool** to add interactive callout annotations to documents. These annotations are used to highlight specific areas within documents. See **here** 864 for further information.
- Click ![icon] **Highlight Text Tool** to highlight existing document text. See **here** 869 for further information.
- Click ![icon] **Strikeout Text Tool** to strike-through existing document text. See **here** 873 for further information.
- Click ![icon] **Underline Text Tool** to underline existing document text. See **here** 877 for further information.
- Click ![icon] **Sticky Note Tool** to add sticky note annotations to documents. Sticky notes display as yellow note icons in documents. The information they contain is displayed when the pointer is hovered over icons or when icons are double-clicked. See **here** 849 for further information.

- Click ![icon] **File Attachment Tool** to attach files to documents. When this process is complete an icon will be displayed. When icons are clicked the associated file will open. See **here** 960 for further information.
- Click ![icon] **Sound Tool** to add audio content to documents. When this process is complete an icon will be displayed. When icons are clicked the associated audio file will open. Audio files can be uploaded from the local machine or a microphone can be used to create them. See **here** 964 for further information.
- Click ![icon] **Line Tool** to add line annotations to documents. See **here** 899 for further information.
- Click ![icon] **Arrow Tool** to add arrow annotations to documents. See **here** 899 for further information.
- Click ![icon] **Oval Tool** to add oval annotations to documents. See **here** 916 for further information.
- Click ![icon] **Rectangle Tool** to add rectangle annotations to documents. See **here** 911 further information.
- Click ![icon] **Polygon Line Tool** to add polygon line annotations to documents. See **here** 921 for further information.
- Click ![icon] **Polygon Tool** to add polygon annotations to documents. See **here** 928 for further information.
- Click ![icon] **Cloud Tool** to add cloud annotations to documents. See **here** 935 for further information.
- Click ![icon] **Stamp Tool** to add stamp annotations to documents. Several default stamps are available and it is also possible to create custom stamps. See **here** 940 for further information.
- Click ![icon] **Pencil Tool** to add freehand annotations to documents. See **here** 955 for further information.
- Click ![icon] **Eraser Tool** to erase **Pencil Tool** annotations. See **here** 955 for further information.

Use the options in the **Measure** toolbar to access the measurement tools:
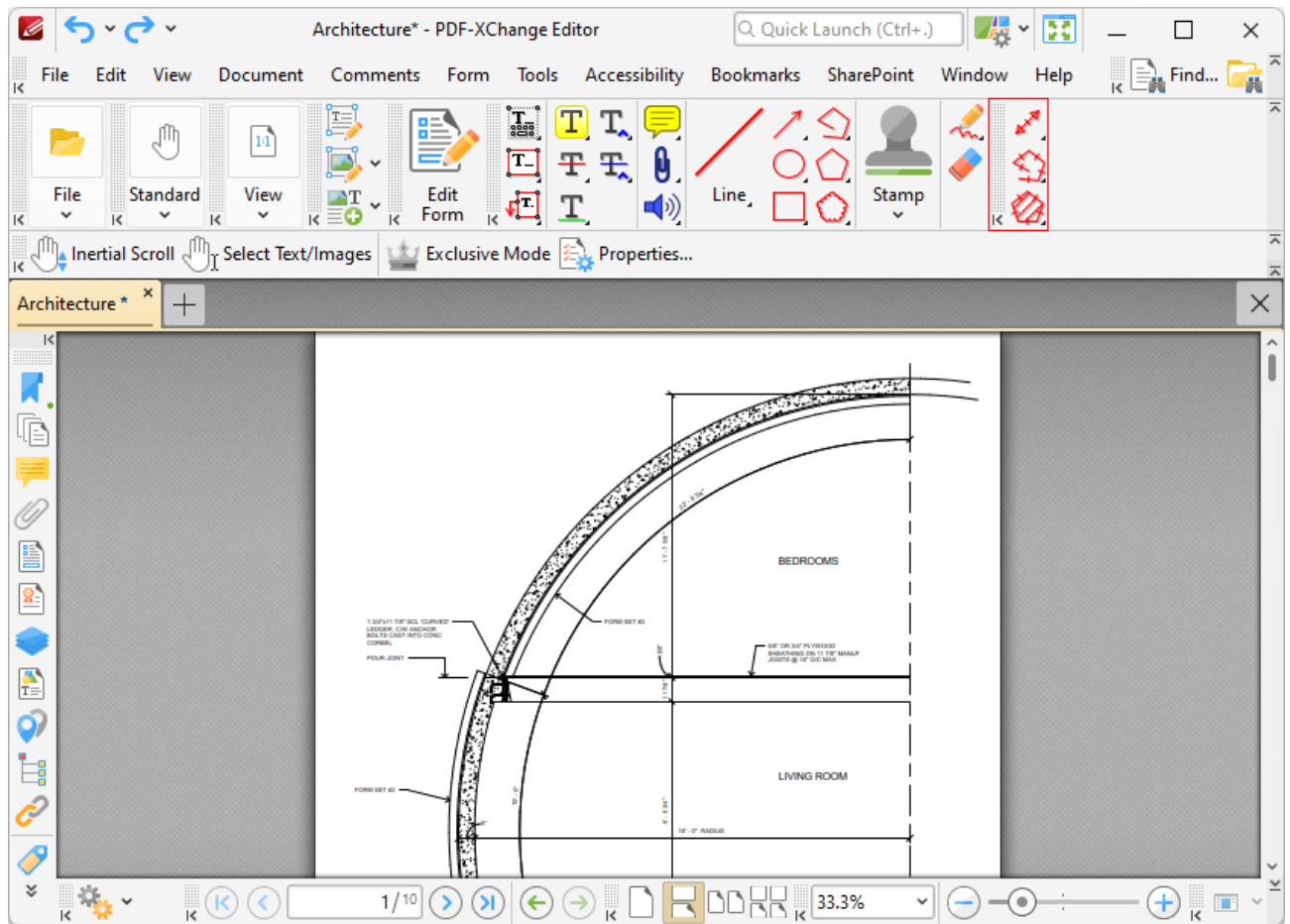
Figure 13. Measure Options

- Click ✏ the **Distance Tool** to measure the distance between two points. See **here** [971] for further information.
- Click ◇ the **Perimeter Tool** to measure the distance between multiple points. See **here** [976] for further information.
- Click ◈ the **Area Tool** to measure the area within user-specified lines. See **here** [981] for further information.

The **Properties Toolbar** is located beneath the **Shortcut Toolbar.** The appearance and options of the **Properties Toolbar** depend on the content currently selected in the document:
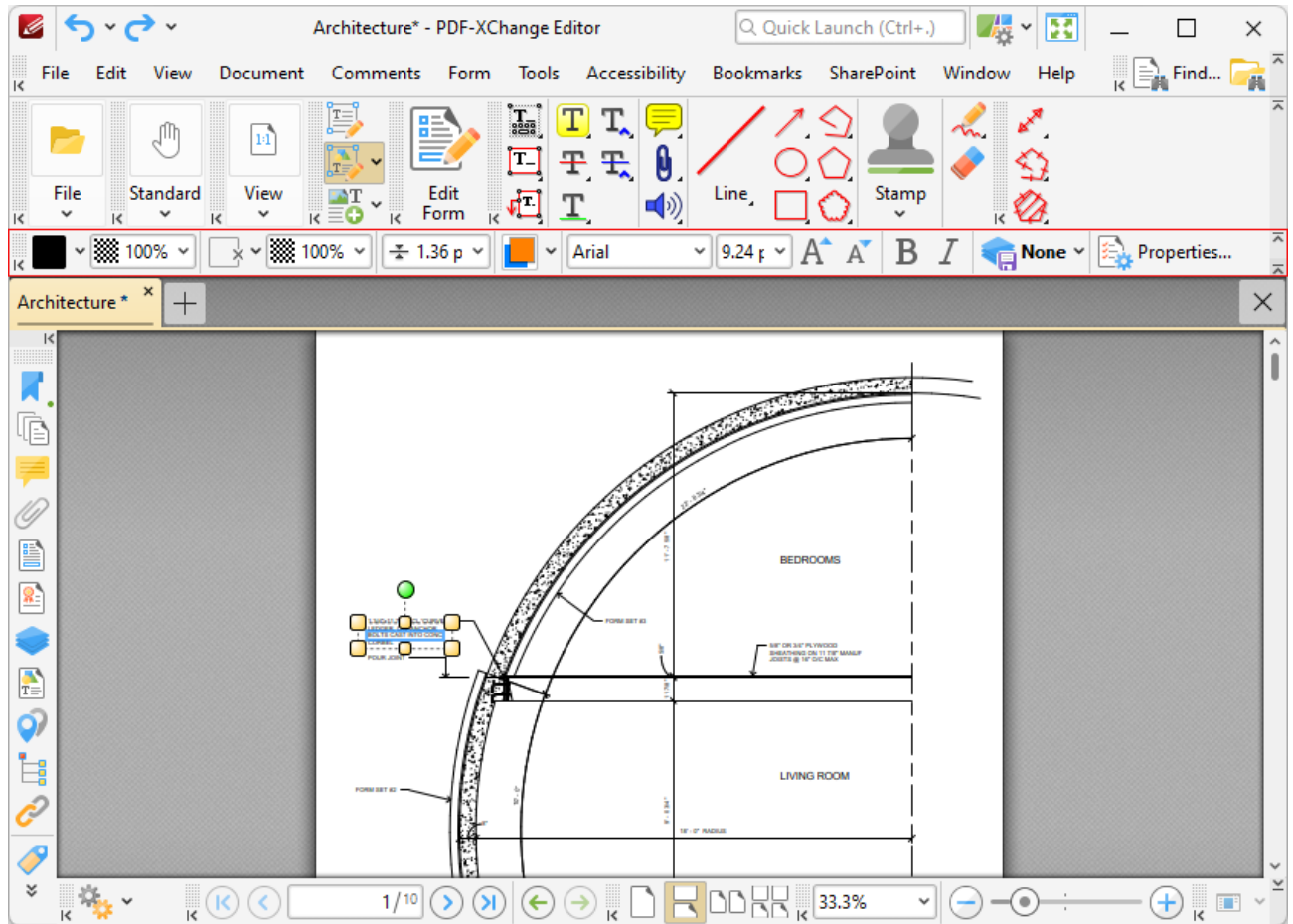
Figure 14. Properties Toolbar

- The properties available when tools are in use are detailed on the tool pages, which are available **here.** [803]
- Text editing options are detailed in the **Properties Toolbar** when tools that feature text options are in use. See **here** [1288] for further information.

The bottom section of the user interface is composed of four toolbars:
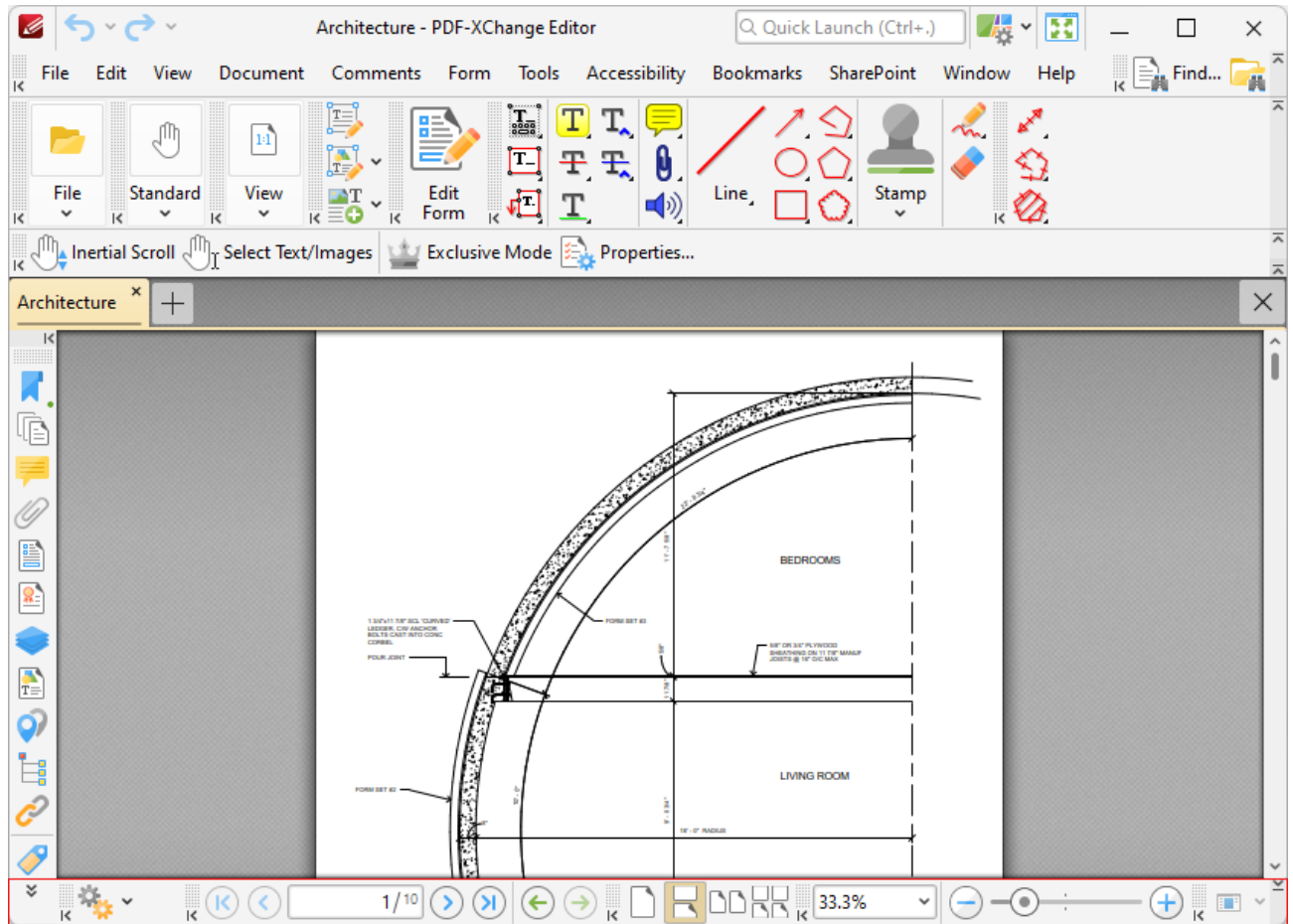
Figure 15. Lower Toolbars

The **Document Options Toolbar** is located in the left section of the lower toolbar:
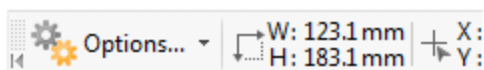
Figure 16. Document Options Toolbar

The dimensions of the active document and the current pointer location are displayed on the right. Click **Options** to open/close the document editing panes and access editing aids. See **here** 475 for further information.

The **Page Navigation Toolbar** is located in the center of the lower toolbar:
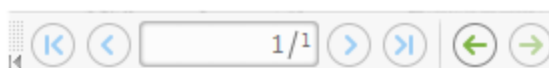
Figure 17. Page Navigation Toolbar

These buttons are used to navigate files and file pages. See **here** 483 for further information.

The **Page Layout Toolbar** is located in the right section of the lower toolbar and appears as below:

Figure 18. Page Layout Toolbar

These options determine the page display. See **here** 482 for further information.

The **Launch Application Toolbar** is located on the right of the **Page Layout Toolbar** and appears as below:

Figure 19. Launch Application Toolbar

This toolbar can be used to create convenient shortcuts to third-party applications. See **here** 479 for further information.

The **Quick Tools** toolbar is available on the left side of the window:
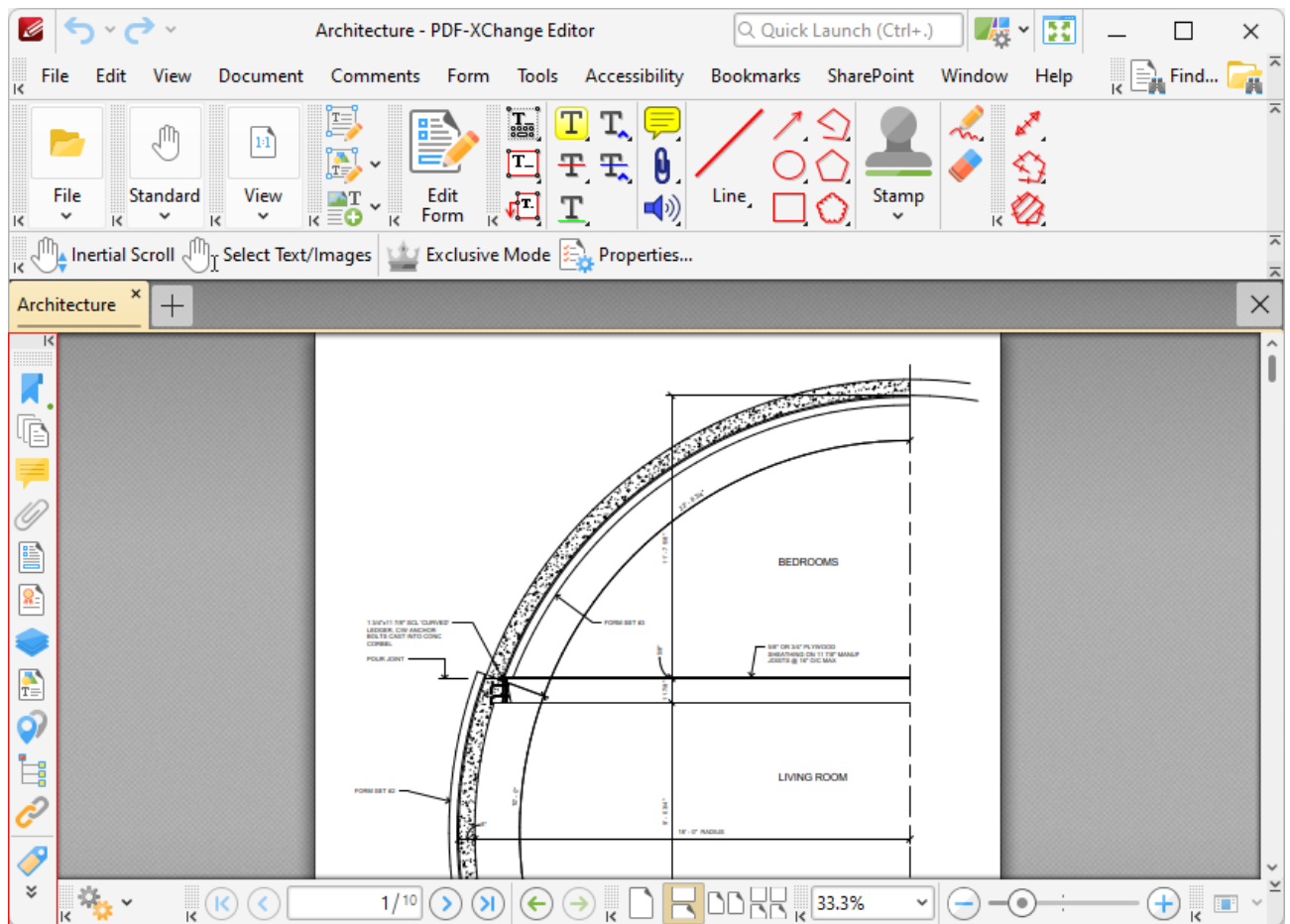
Figure 20. Quick Tools Toolbar

This toolbar provides quick access to the editing panes used in **PDF-XChange Editor.** The editing panes are detailed **here.** 314

Note that the arrow icons on the left of toolbars can be used to expand/collapse toolbars, and the grid of dots above the arrow icon can be used to click and drag toolbars to a different location in the user interface.

Additionally, please note that several of the keyboard shortcuts relate to the commands displayed on the user interface. See **here** 1141 for a comprehensive list of available keyboard shortcuts.

5 **Tabs Guide**

Tabs Guide

This section of the manual details the tabs of the **Menu Toolbar** 473 in **PDF-XChange Editor:**
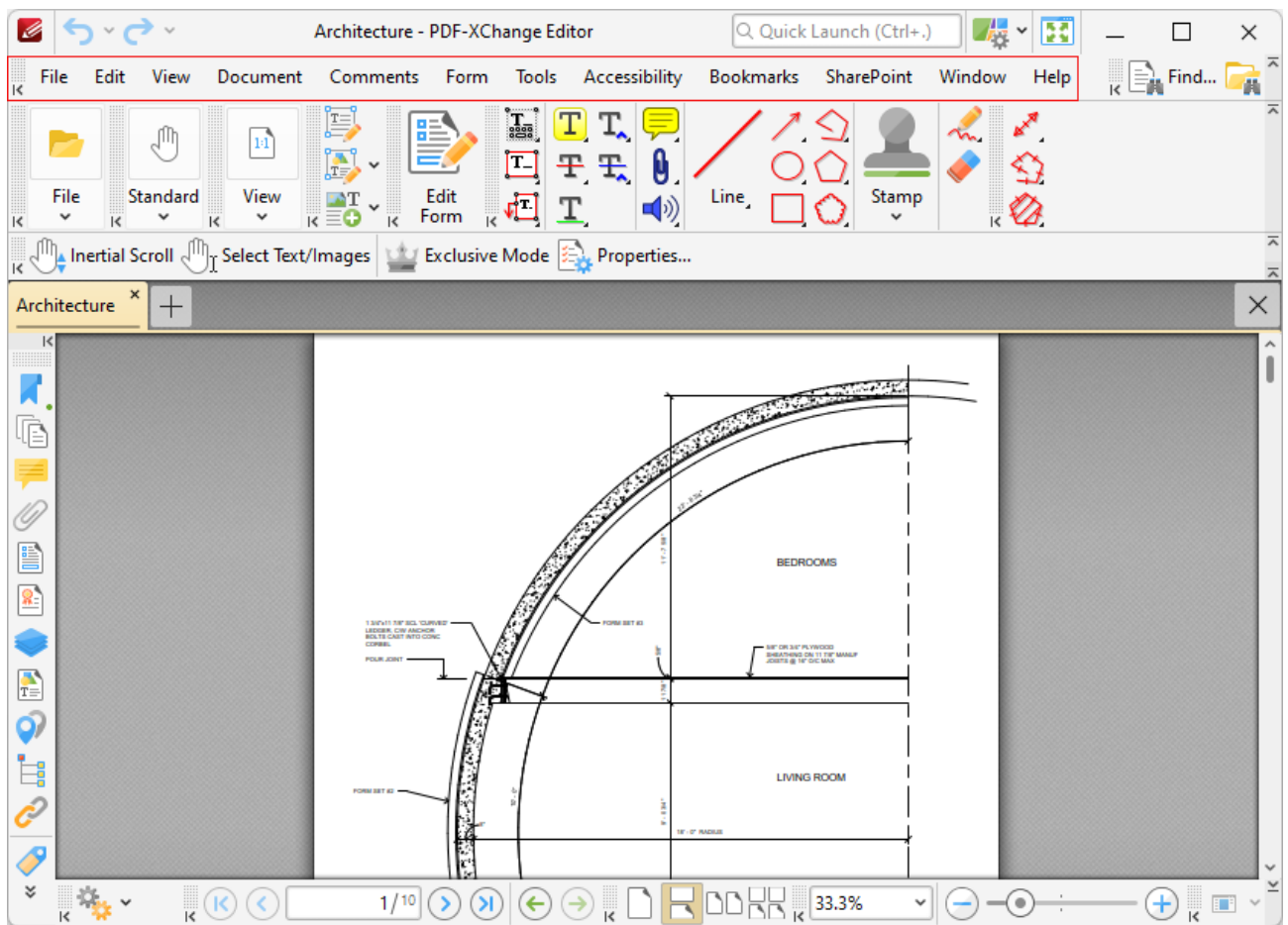
Figure 1. Menu Toolbar

There are eleven tabs that each feature different commands and settings. Click the links below to open the associated page of the manual:

- **File** 86 contains file-level operations such as open, close, save and print documents.

- **Edit** 203 contains editing options such as cut, copy, paste and delete selected content.
- **View** 312 contains options that determine what is displayed in the main window such as toolbar shortcuts and editing panes. Document layout options are also available in this tab.
- **Document** 631 contains document editing options such as add/remove watermarks, edit backgrounds, crop pages and digital signature options.
- **Comments** 773 contains options for editing document comments, such as converting comments to base content, importing/exporting comments and creating a comment summary.
- **Form** 793 contains options for managing, highlighting and creating document form fields such as radio buttons, dropdown menus and barcodes.
- **Tools** 803 contains submenus of the **PDF-XChange Editor** tools, which can be used to manipulate, edit and annotate documents.
- **Advanced** 1042 contains options that relate the creation and management of document bookmarks.
- **SharePoint** 1091 contains options that relate to files associated with the **Microsoft Office SharePoint Server.**
- **Window** 1096 contains options that relate to the display of the main window.
- **Help** 1098 contains links to software assistance, such as the **PDF-XChange** main website and user-forum.

5.1 File

File

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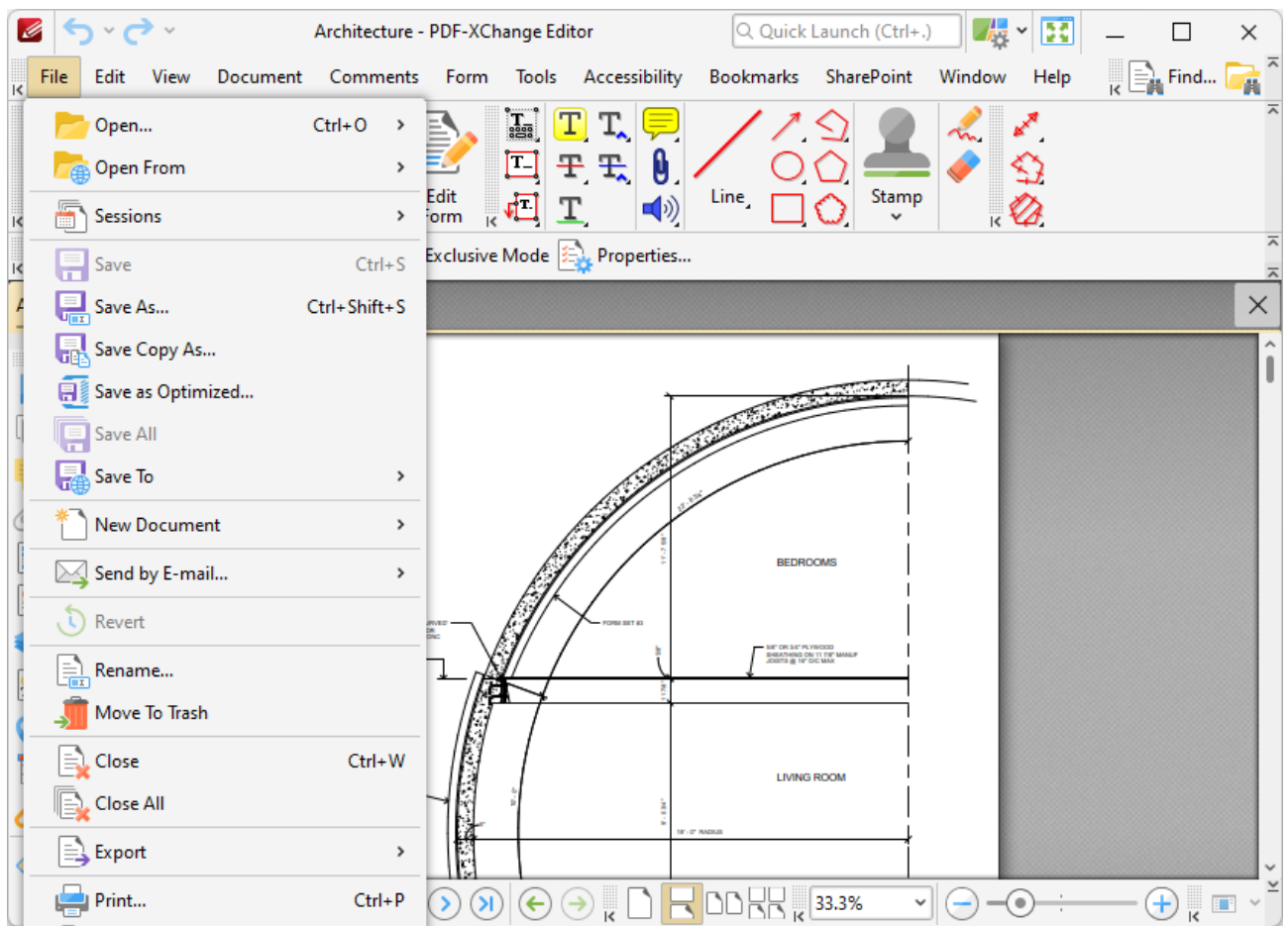
Figure 1. File Tab Submenu

Click the links below to view the associated section of the manual:

- **Open/Open From**
- **Sessions**

- **Save Options** 97
- **New Document** 109
- **Send by E-mail** 159
- **Revert** 161
- **Rename** 162
- **Move to Trash** 163
- **Close Options** 164
- **Export** 166
- **Print Options** 179
- **Document Properties** 185
- **Audit Space Usage** 198
- **Copy Full File Name** 200
- **Copy File** 201
- **Open Containing Folder** 202

5.1.1   Open/Open From

Open/Open From

The **Open** and **Open From** options are used to open files in **PDF-XChange Editor.**

Hover over **Open** to view a list of recent documents. There are two options: **Pinned Recents** and **Unpinned Recents:**
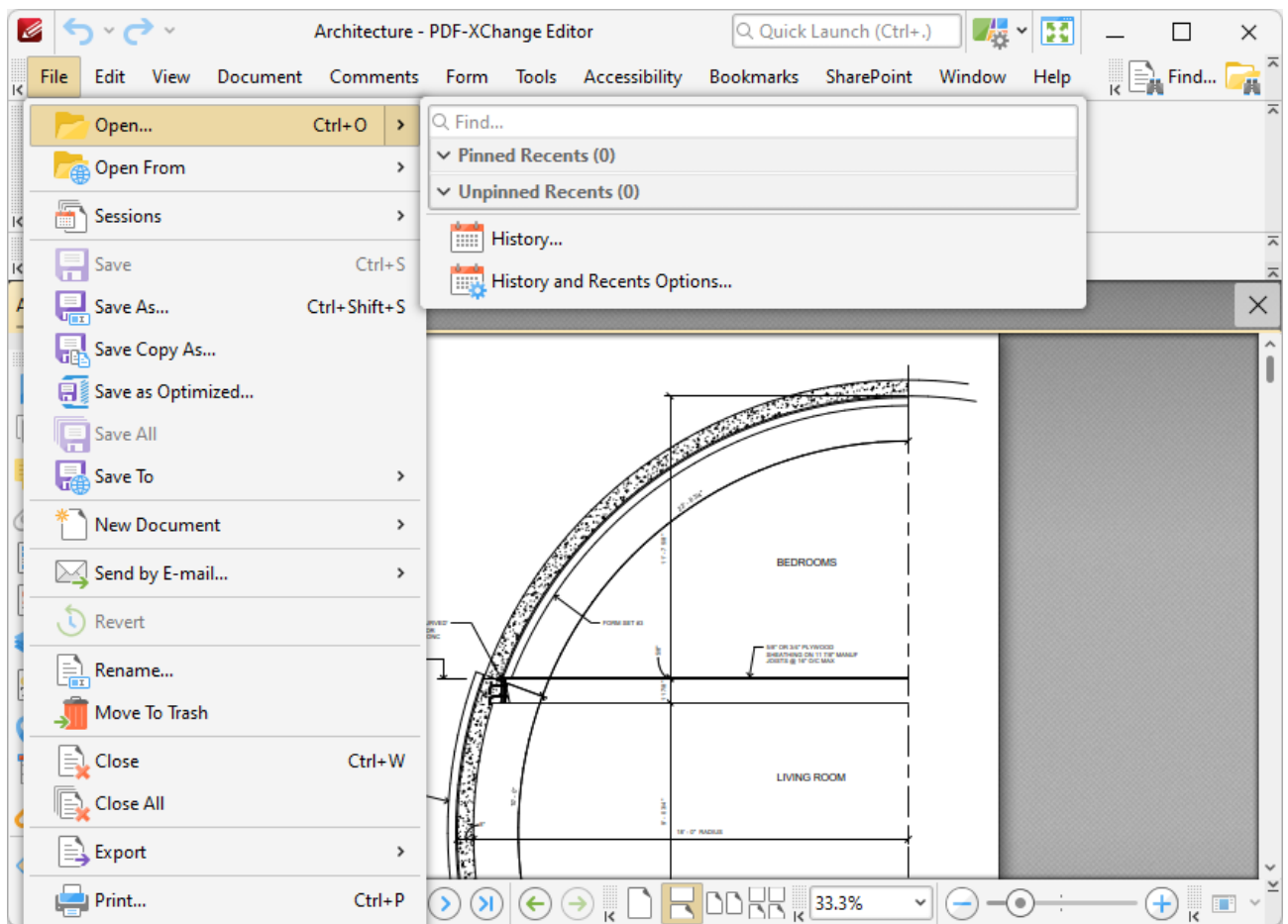
Figure 1. File Tab Submenu, Open Option

- All documents viewed previously in **PDF-XChange Editor** are detailed chronologically in the **Unpinned Recents** list.

- Enter search terms in the **Find** text box to search for recently open documents.
- The pin feature is included so documents considered more important are not moved down the list when newer 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 **Open** 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.**
- Click **History** to open the **History** pane, as detailed <u>**here.**</u> 600
- Click **History and Recents Options** to view/edit the **History** and **Recent List Options.** These options can be used to determine the number of items in the history lists, the lifetime of items and their display options, and also contains options to clear the lists:
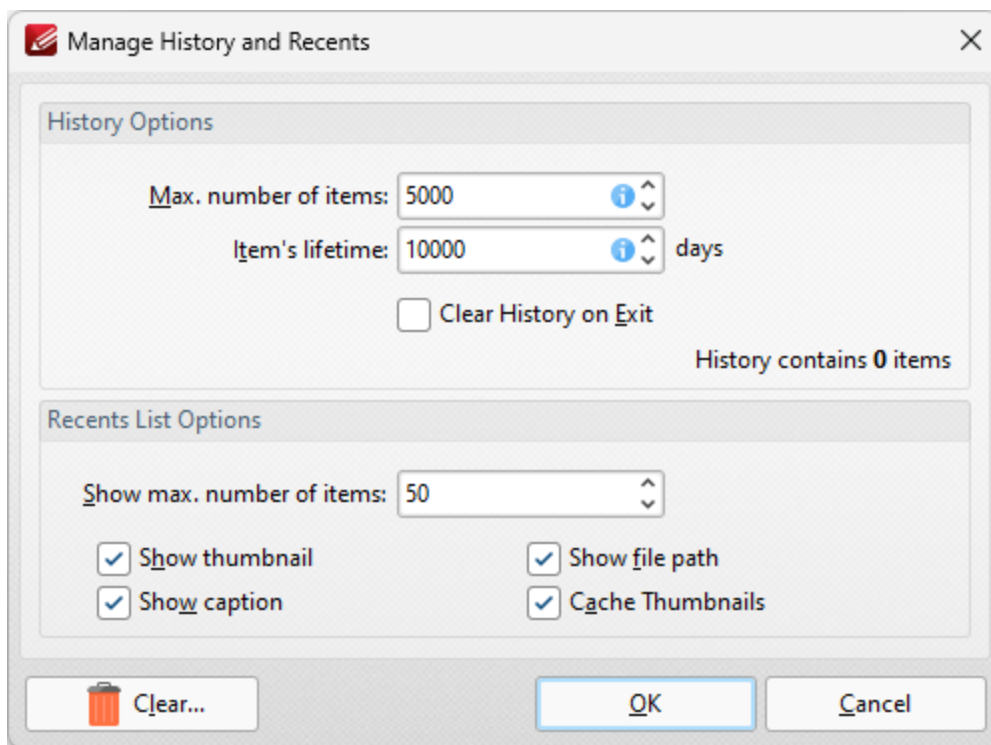
Figure 2. Manage History and Recents Dialog Box

Hover over **Open From** to open files from specific locations. The following submenu will open:
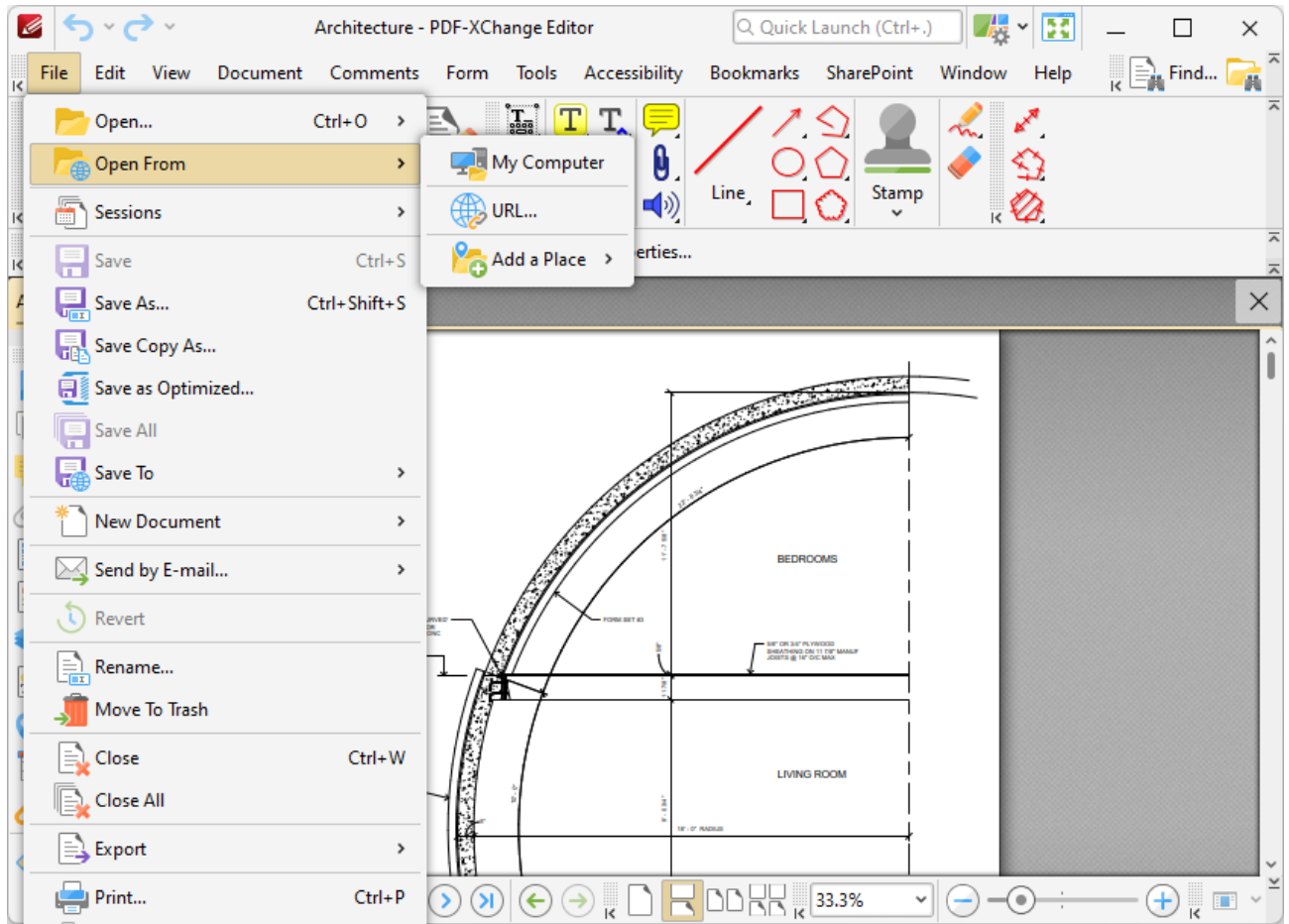
Figure 3. Open From Options

- 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.
- Hover over **Add a Place** to view additional options for opening files:
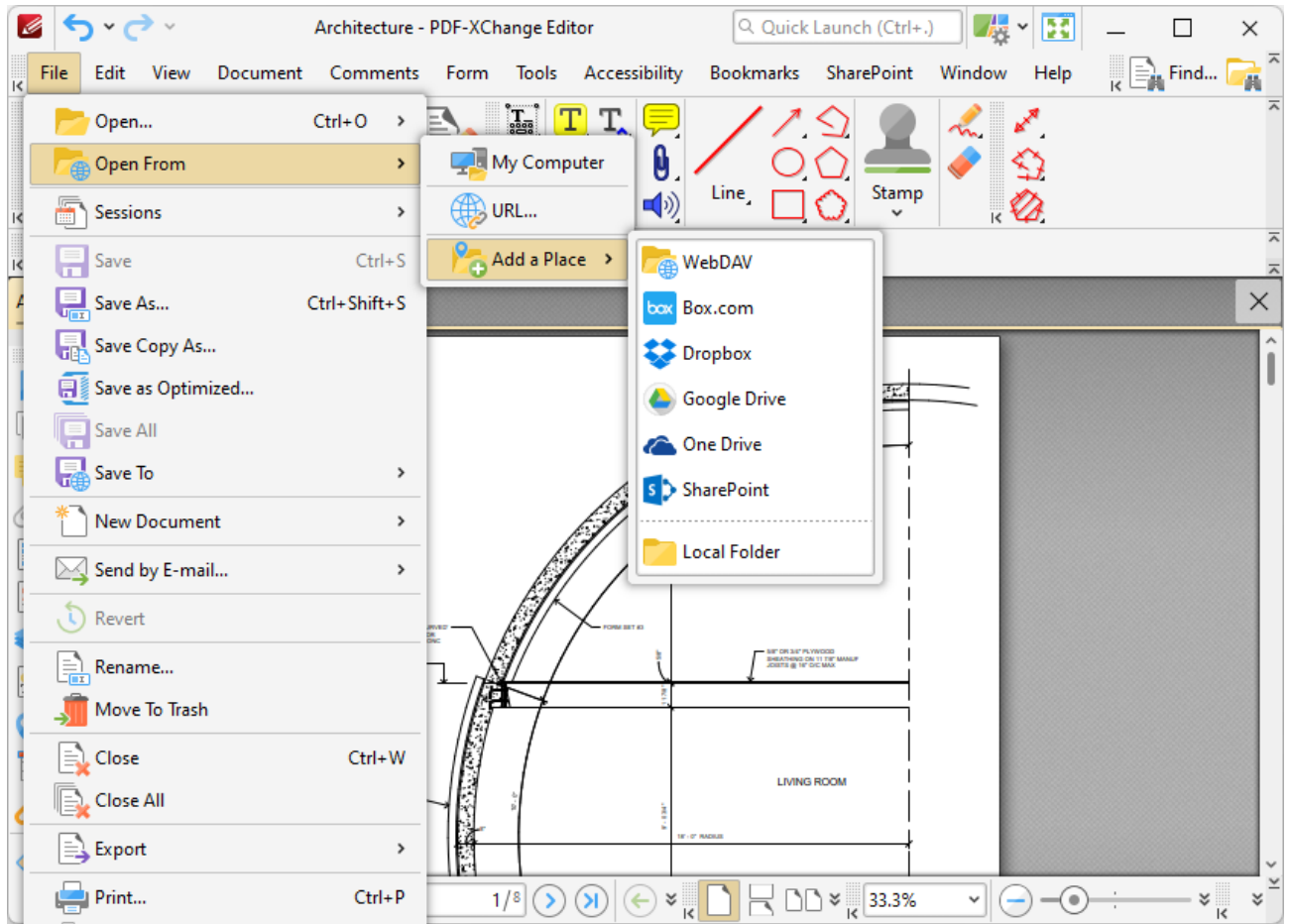
Figure 4. Add a Place Options

- Click **Webdav, Box.com, Dropbox, Google Drive, One Drive** or **SharePoint** to add accounts from these locations to **PDF-XChange Editor.**
- Click **Local Folder** to add a local folder.

Note that added places will subsequently be visible in and can be selected from the **Open From** submenu:
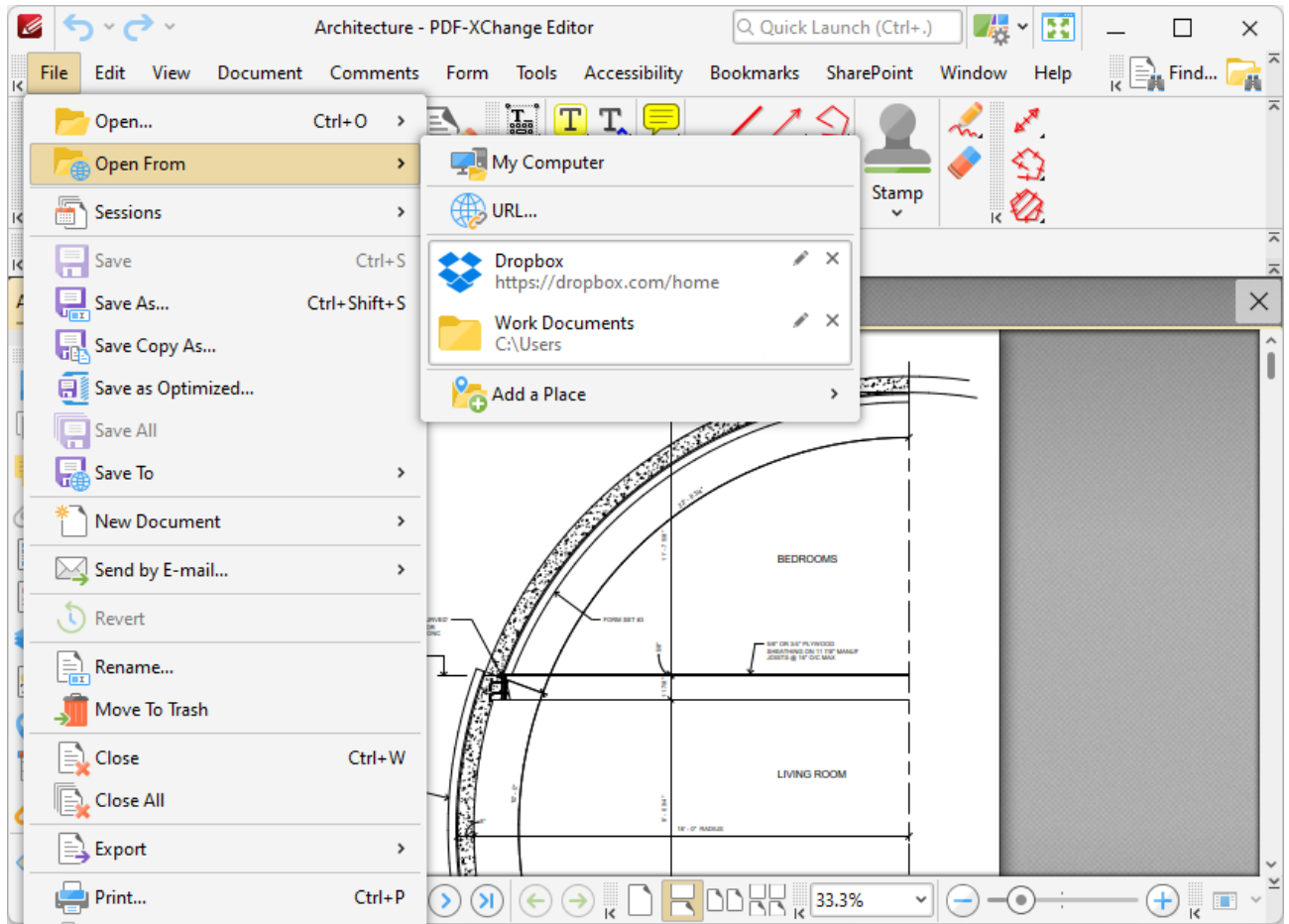
Figure 5. Places Added to Open From Submenu

Click the 'x' icon to remove places from the list, or the pencil icon to rename places.

5.1.2   Sessions

Sessions

Hover over **Sessions** to launch the following submenu:
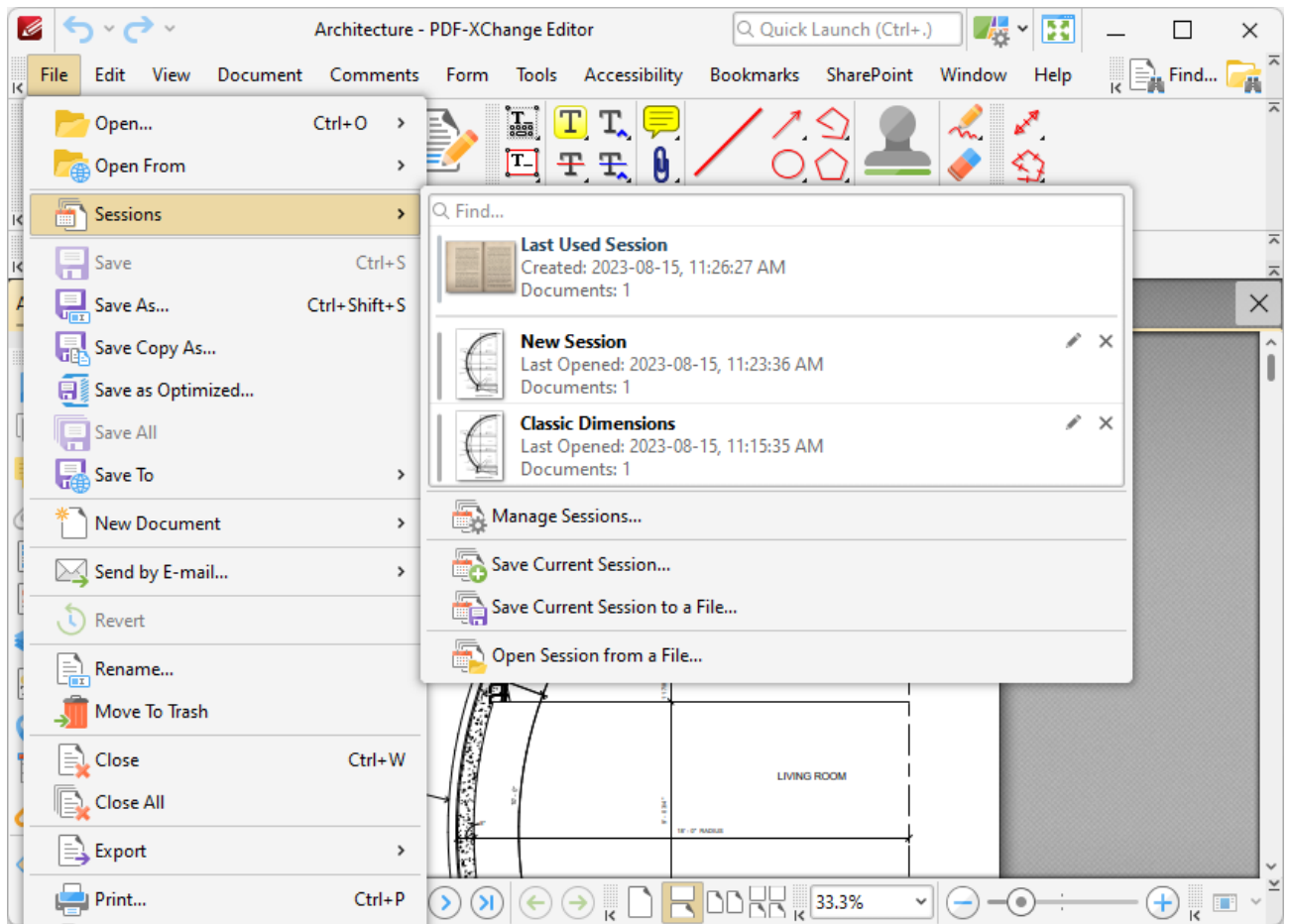
Figure 1. File Tab Submenu, Sessions Option

Sessions make the process of using **PDF-XChange Editor** more efficient. A session is defined as an active instance of using **PDF X-Change Editor** to view/edit documents. The software will remember which documents were open, their order/layout within the main window, the location of the main window on the screen and the status of panes such as the **Thumbnails/Properties** pane. The most recently saved sessions are detailed at the top of the sessions pane.

- Click sessions to open sessions.
- Click **Last Used Session** to restore the last session of **PDF-XChange Editor.**
- Click the 'x' icon to remove sessions and the pencil icon to rename sessions.
- Click **Manage Sessions** to manage existing sessions. The **Manage Sessions** dialog box detailed in *(figure 2)* will open.
- Click **Save Current Session** to save the active session. The **Save Current Session** dialog box will open. Enter a name for the session in the text box and click **OK** to save. It will then be available in the **Manage Sessions** list as detailed above.
- Click **Save Current Session to a File** to save the current session as a **.xcesession** file for subsequent use. Saved sessions can be imported via the **Manage Sessions** dialog box. Alternatively, double-clicked to restore sessions.
- Click **Open Session from a File** to open a session saved in the **.xcesession** format as detailed above.
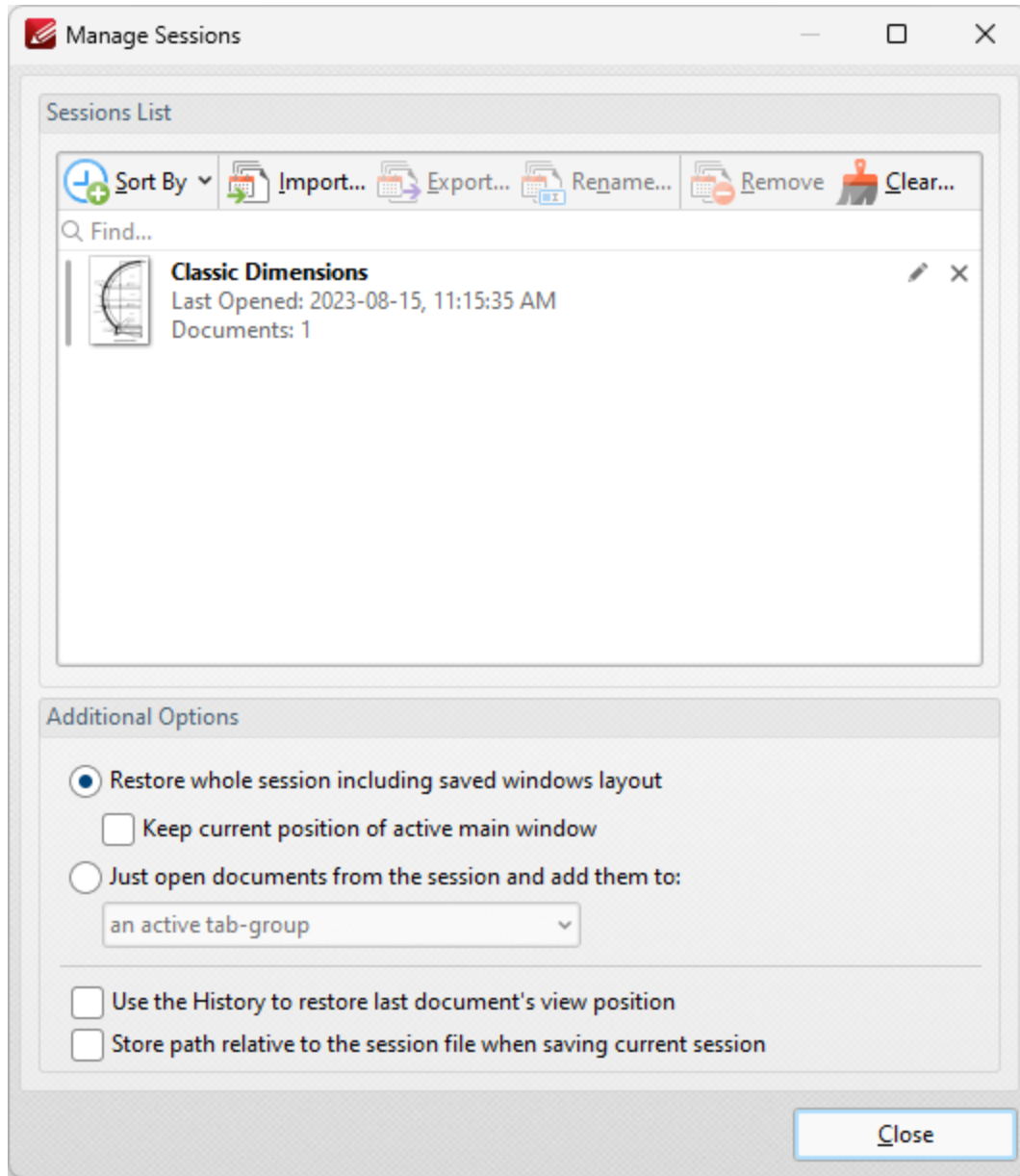
Figure 2. Manage Sessions Dialog Box

- Click **Import** to import a previously saved session. The **Open Session** dialog box will open. Select the desired file and click **Open** to open it.
- Click **Export** to export the session currently selected in the list of sessions. The **Save Current Session** dialog box will open. Enter a name for the file and click **Save** to save it.
- Click **Rename** to rename the session currently selected. The **PDF-XChange Editor** dialog box will open. Enter a new name for the session in the text box and click **OK** to save it.
- Click **Remove** to remove the session currently selected.
- Click **Remove All** to remove all sessions from the list.

Further settings are available in the **Additional Options** section:

- Select the **Restore whole session including saved windows layout** button as desired. Alternatively, select the **Just open documents from the session and add them to** button and then select an option from the dropdown menu:
  - **Active Tab Group**
  - **New Tab Group in the Active Window**
  - **New Tab Group in a New Window**
- Select the **Keep current position of active main window** and/or **Use the History to restore last document's view position** boxes as desired.

5.1.3 **Save Options**

Save Options

The save options are used to save documents in **PDF-XChange Editor.** They are enabled when the active document has been modified:
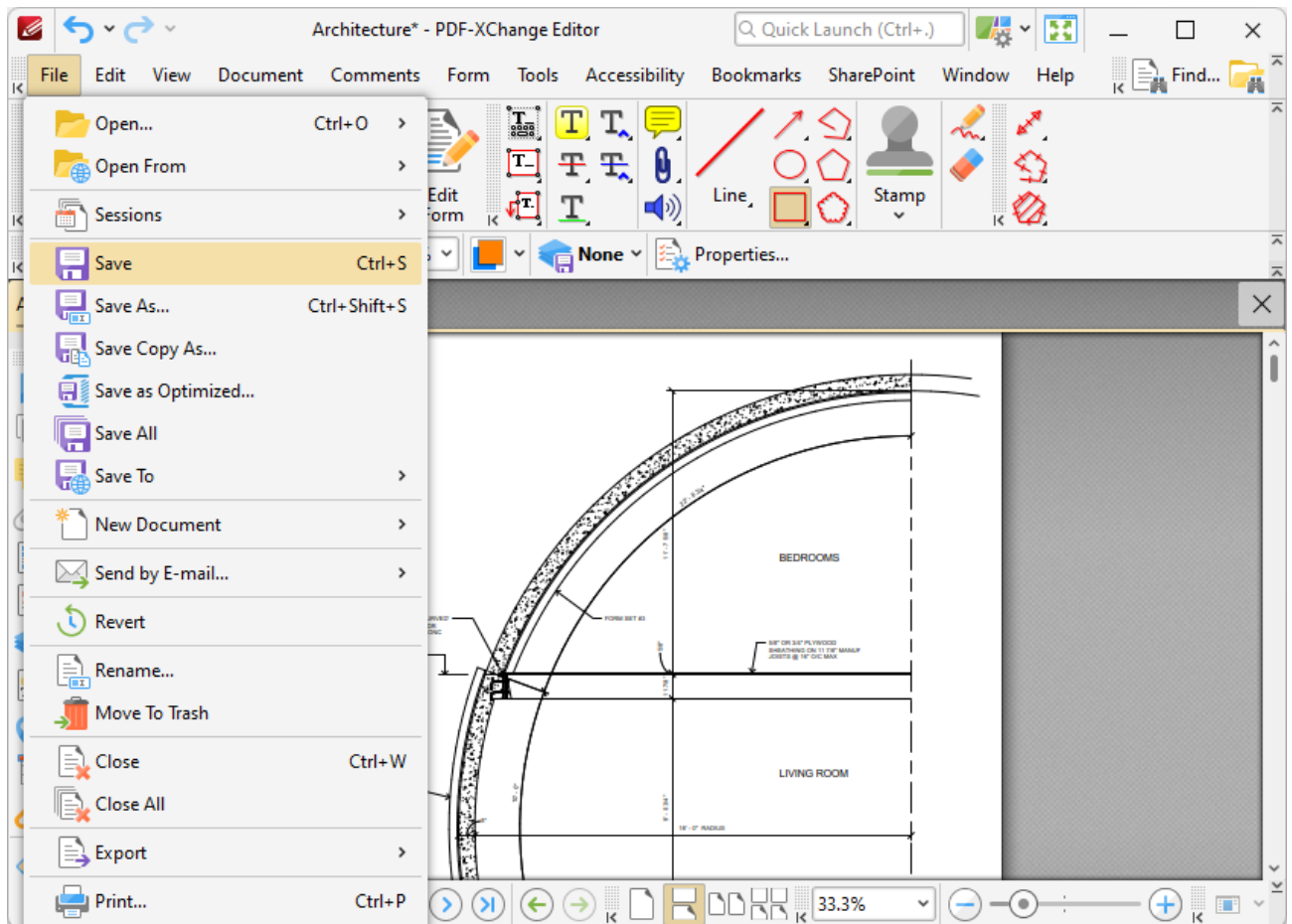
Figure 1. File Tab Submenu, Save Option

- 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/or format, and retain the original version of the document. The **Save File As** dialog box will open, as detailed in *(figure 2)* below. Select the desired format and then click **Save** to save the document.
- 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 as a suffix.
- Click **Save All** to save all open documents.
- Click **Save To** to save documents directly to predefined locations, such as the cloud services **SharePoint** and **Dropbox.**
- Click **Save as Optimized** to optimize files before they are saved. When this option is selected the **Optimize PDF** dialog box will open, as detailed in *(figure 3)* below.
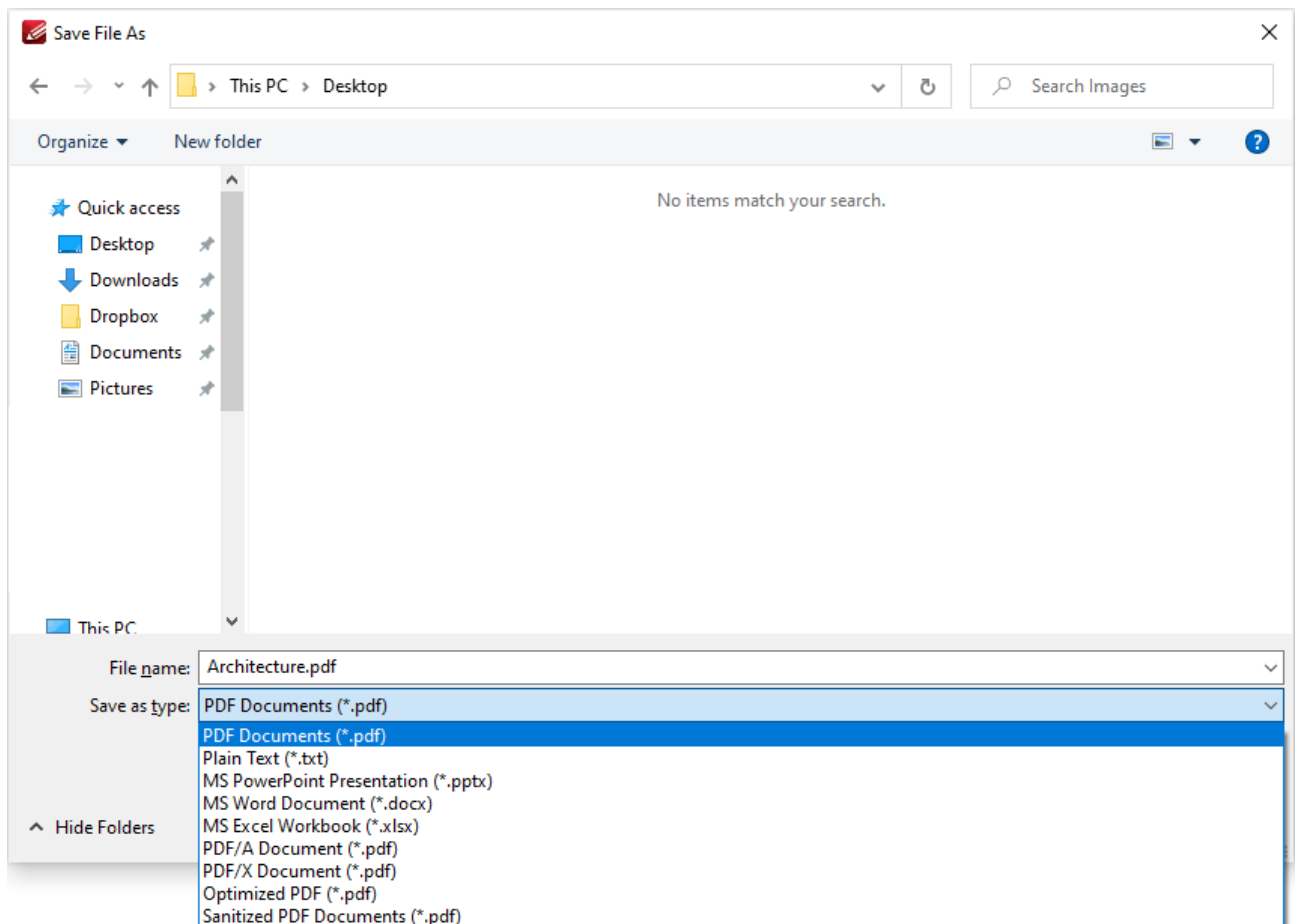
Figure 2. Save File As Dialog Box, Save As Type Options

- Select **PDF Documents** to save the document as a **(*.pdf)** file.
- Select **Plain Text** to save the document as a **(*.txt)** file.
- Select **MS Powerpoint Presentation** to save the document as a **(*.pptx)** file.

- Select **MS Word Document** to save the document as a **(*.docx)** file.
- Select **MS Excel Workbook** to save the document as a **(*.xlsx)** file.
- Select **PDF/A Document** to save the document as a **(*.pdf) PDF/A** file. The PDF/A format is used for archiving documents. Further information about this format is available **here.**
- Select **PDF/X Document** to save the document as a **(*.pdf) PDF/X** file. The PDF/X format is used for the facilitation of graphics exchange. Further information about this format is available **here.**
- Select **Optimized PDF** to optimize the document and save it as a **(*.pdf)** file. The process of optimization is to reduce the file size. Further information about this option is detailed below.
- Select **Sanitized PDF** to sanitize the document of sensitive information and save it as a **(*.pdf)** file. Further information about document sanitization is available **here.** [763]
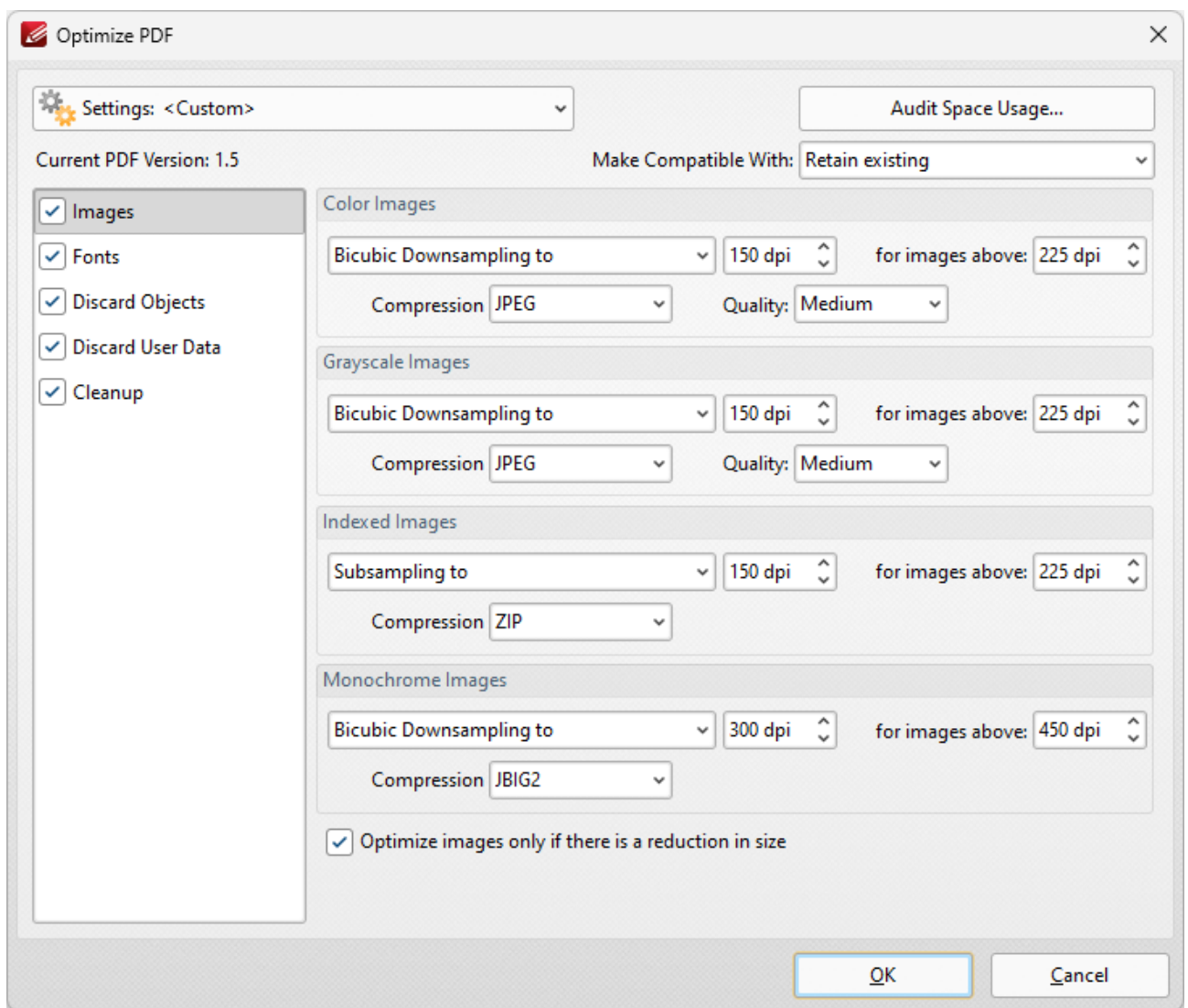
Figure 3. Optimize PDF Dialog Box, Images Tab

These settings are used to optimize PDF content:

Images

The options for optimizing images are detailed in *(figure 3).* They are as follows:

- 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.
- The **Optimize images only if there is a reduction in size** box is selected by default. Clear this box to optimize images even when there is no reduction in size.

Fonts

Click **Fonts** to determine the settings for font optimization:
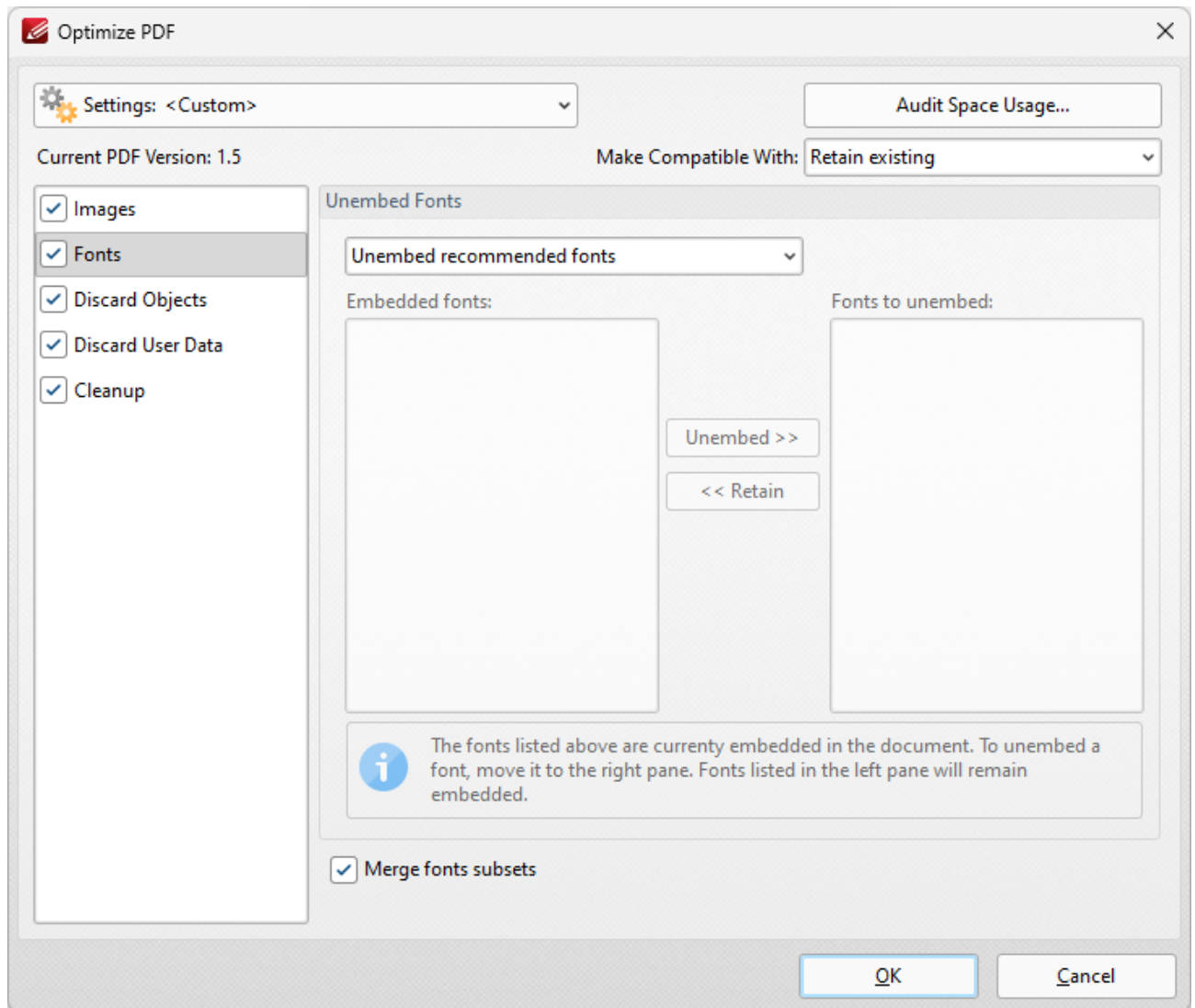
Figure 4. Optimize PDF Dialog Box, Fonts Tab

- Use the **Unembed Fonts** dropdown menu to determine font embedding options:
  - Select **Do Not Unembed any font** to retain all embedded fonts.
  - Select **Unembed recommended fonts** to unembed recommended fonts, which will result in the unembedding of the most common fonts in order to reduce the file size.
  - Select **Unembed all fonts** to unembed all fonts. This will reduce the size of files as far as possible with regard to fonts. However, it also increases the risk of compatibility issues for subsequent users of the document. This is because they will not be able to read the document unless the application they are using to view the document contains the font. Therefore this setting should be used only in cases where documents contain only common fonts.
  - Select **Select fonts to unembed manually** to unembed a custom selection of fonts. When this option is selected the fonts used in the current 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 to merge duplicated font subsets.

Discard Objects

Click **Discard Objects** to determine the settings for discarding objects:
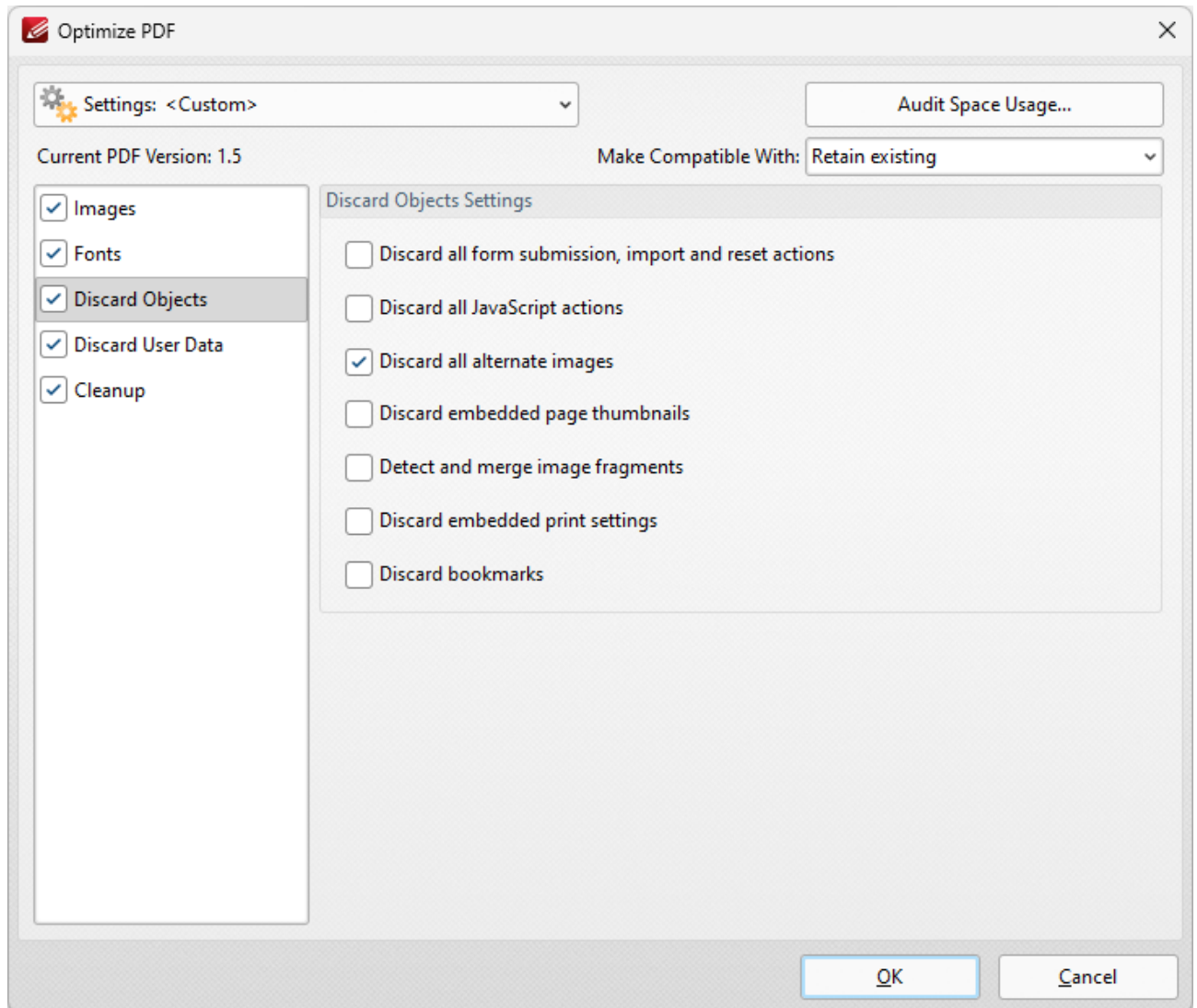
Figure 5. Optimize PDF Dialog Box, Discard Objects Tab

- 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 actions from the document.
- Select the **Discard all alternate images** box to remove alternate images from the document. Alternate images are additional versions of existing images that may differ slightly, such as in resolution or color space.

- Select the **Discard embedded page thumbnails** box to remove embedded page thumbnails from the document.
- Select the **Detect and merge image fragments** box to merge image fragments. Note that some images are composed of fragmented sections that are spliced together. Merging these fragments will reduce the file size.
- Select the **Discard embedded print settings** box to discard remnant encoding in cases where documents were created with a virtual printer.
- Select the **Discard bookmarks** box to remove all bookmarks from the document.

Discard User Data

Click **Discard User Data** to determine the settings for discarding user data:
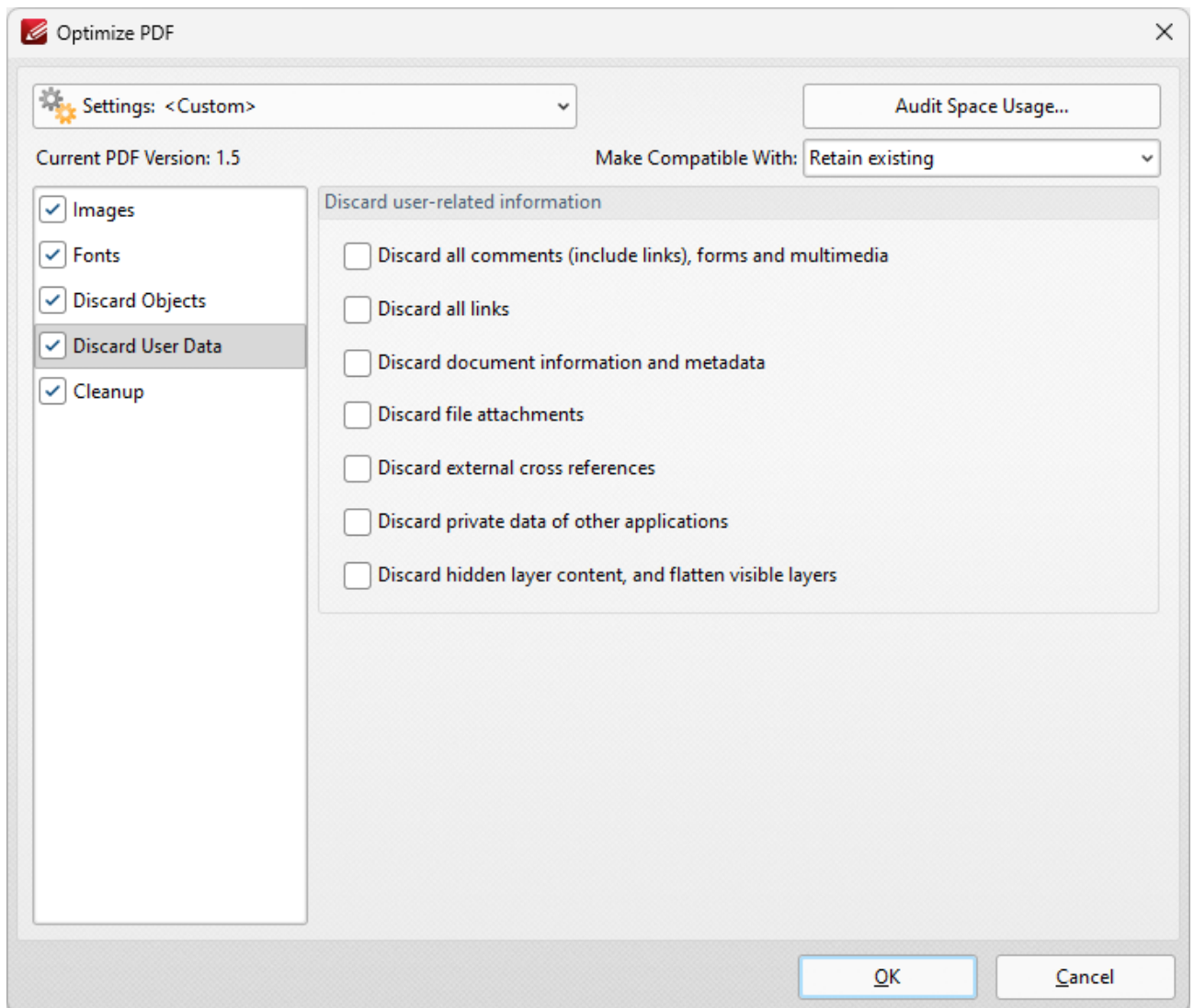
Figure 6. Optimize PDF Dialog Box, Discard User Data Tab

- Select the **Discard all comments, forms and multimedia** box to remove these elements from the document.
- Select the **Discard document information and metadata** box to remove all metadata from the document.
- 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 and flatten the visible layers to base content.

Cleanup

Click **Cleanup** to determine cleanup options:
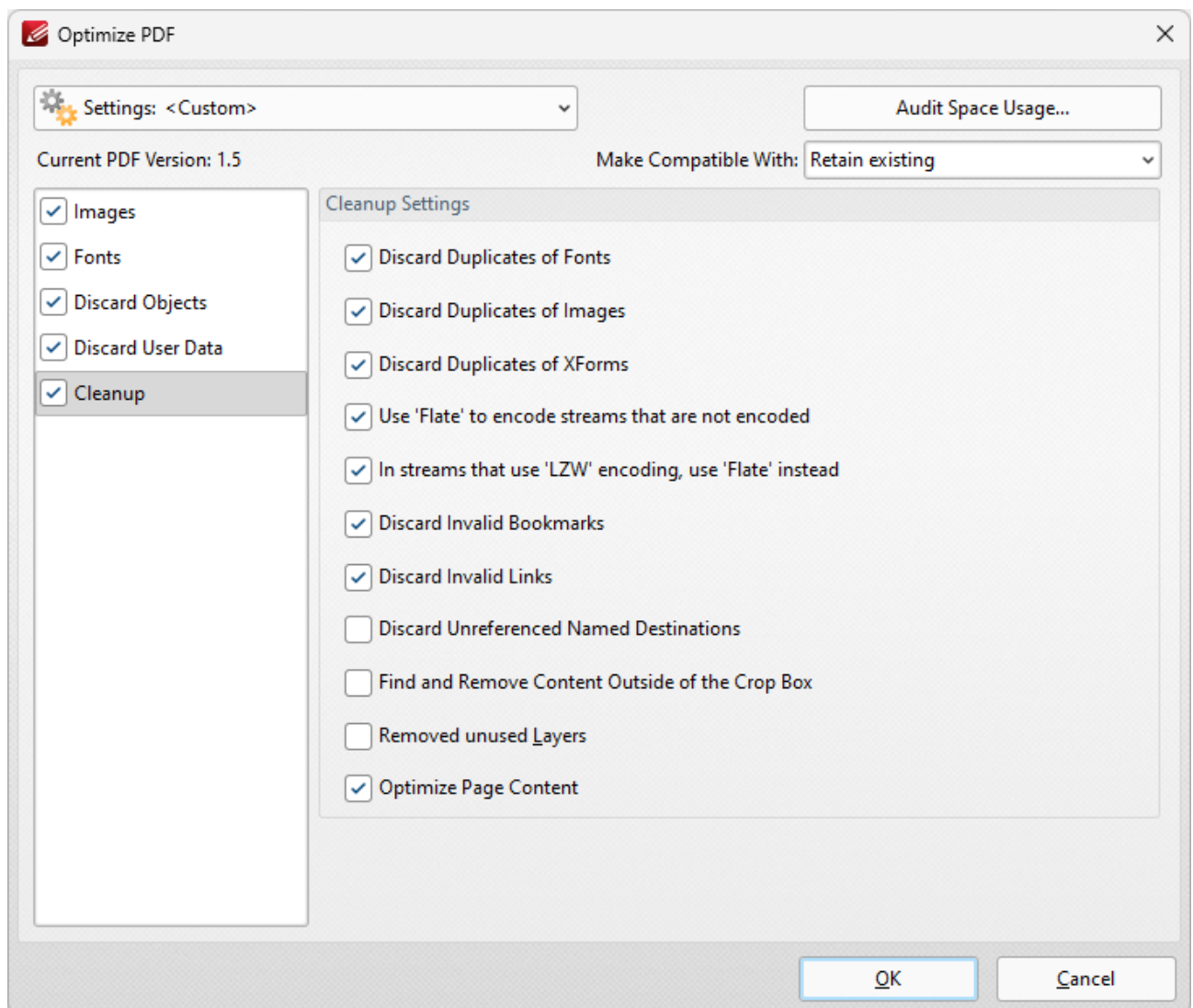
Figure 7. Optimize PDF Dialog Box, Cleanup Tab

- Select the **Discard Duplicates of Fonts** box to remove redundant fonts from the document.
- Select the **Discard Duplicates of Images** box to remove duplicate images from the document.
- Select the **Discard Duplicates of XForms** box to remove duplicate XForms from the document.
- Select the **Use Flate to encode streams that are not encoded** box to compress document information that is pending for compression.
- Select the **In Streams that use LZW encoding use Flate instead** box to use **Flate** compression instead of LZW encoding. This is recommended as **Flate** is compatible with a wider range of platforms.
- Select the **Discard Invalid Bookmarks** box to discard bookmarks that do not contain actions/valid destinations.
- Select the **Discard Unreferenced Named Destinations** box to remove named destinations that are not referenced in the document.
- Select the **Find and Remove Content Outside of the Crop Box** box to remove content outside the crop box. Note that this content is hidden when documents are displayed.

Settings

Click the **Settings** dropdown menu to toggle between **Standard Mode,** which is best for computers, and **Mobile Mode,** which is best for tablets and cell phones:
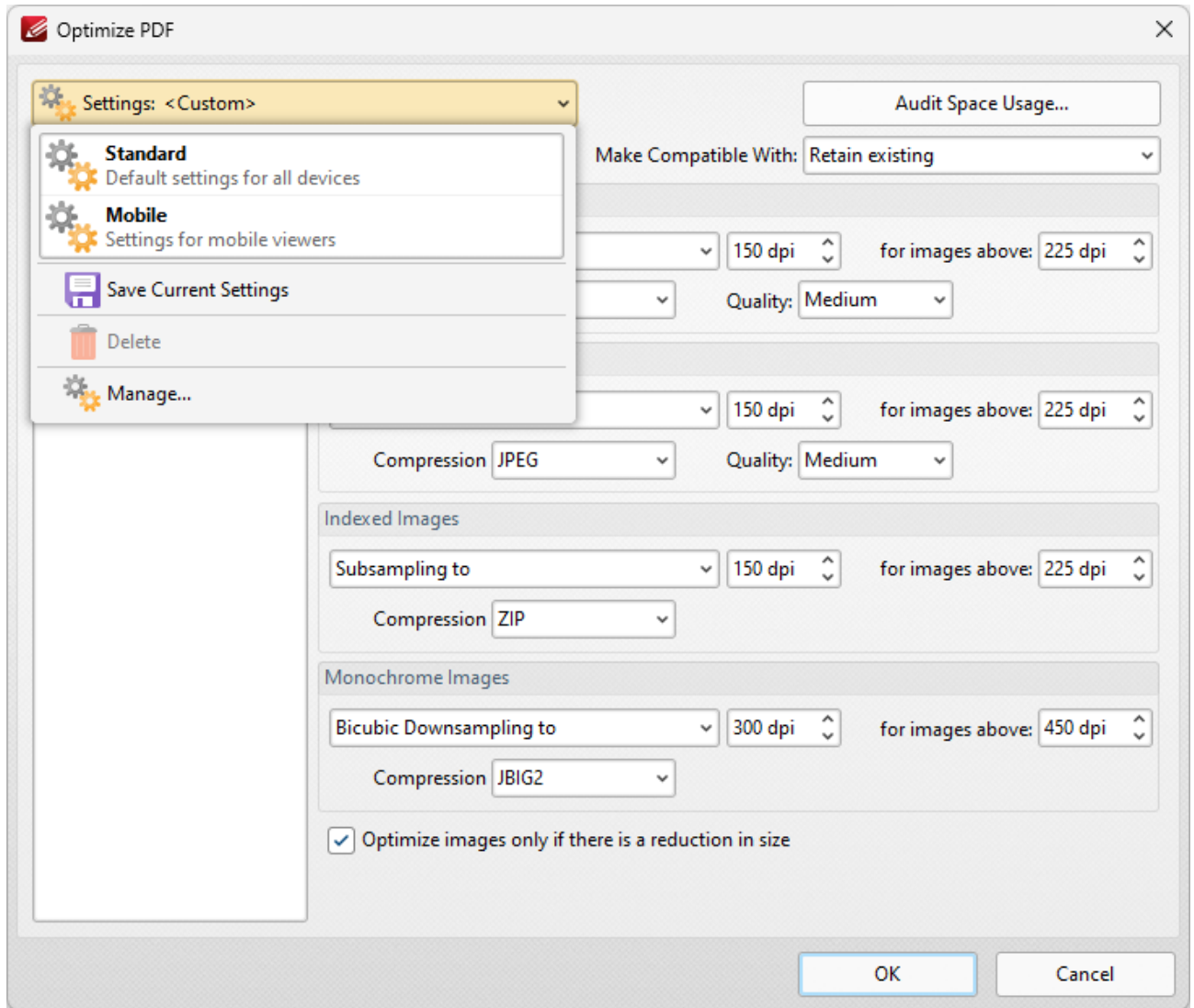
Figure 8. Optimize PDF Dialog Box, Settings Dropdown Menu

The **Settings** dropdown menu is also used to save, manage and delete customized settings:

- Click **Save Current Settings** to save custom settings for subsequent use. Saved profiles are detailed in the **Settings** dropdown menu.
- Click **Delete** to delete selected profiles.
- Click **Manage** to manage saved custom settings. The **Manage Presets** dialog box will open, as detailed below.
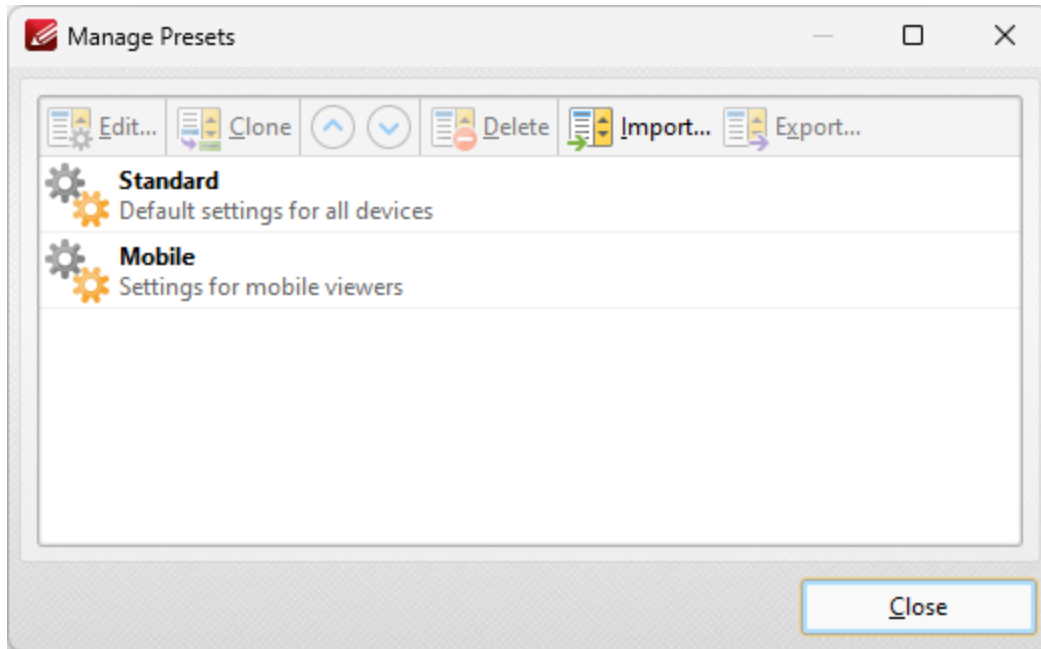
Figure 9. Manage Presets Dialog Box

- Click **Edit** to edit selected profiles.
- Click **Clone** to clone selected profiles. This makes it possible to duplicate profiles and then customize their settings whilst retaining the existing profile and its parameters.
- Use the up and down arrow to move selected profiles up or down in the list.
- Click **Delete** to delete selected profiles.
- Click **Import** to import profiles from a saved file.
- Click **Export** to export profiles to file.

Select an option in the **Make Compatible With** dropdown menu to make optimized documents compatible with specified versions of **Acrobat:**
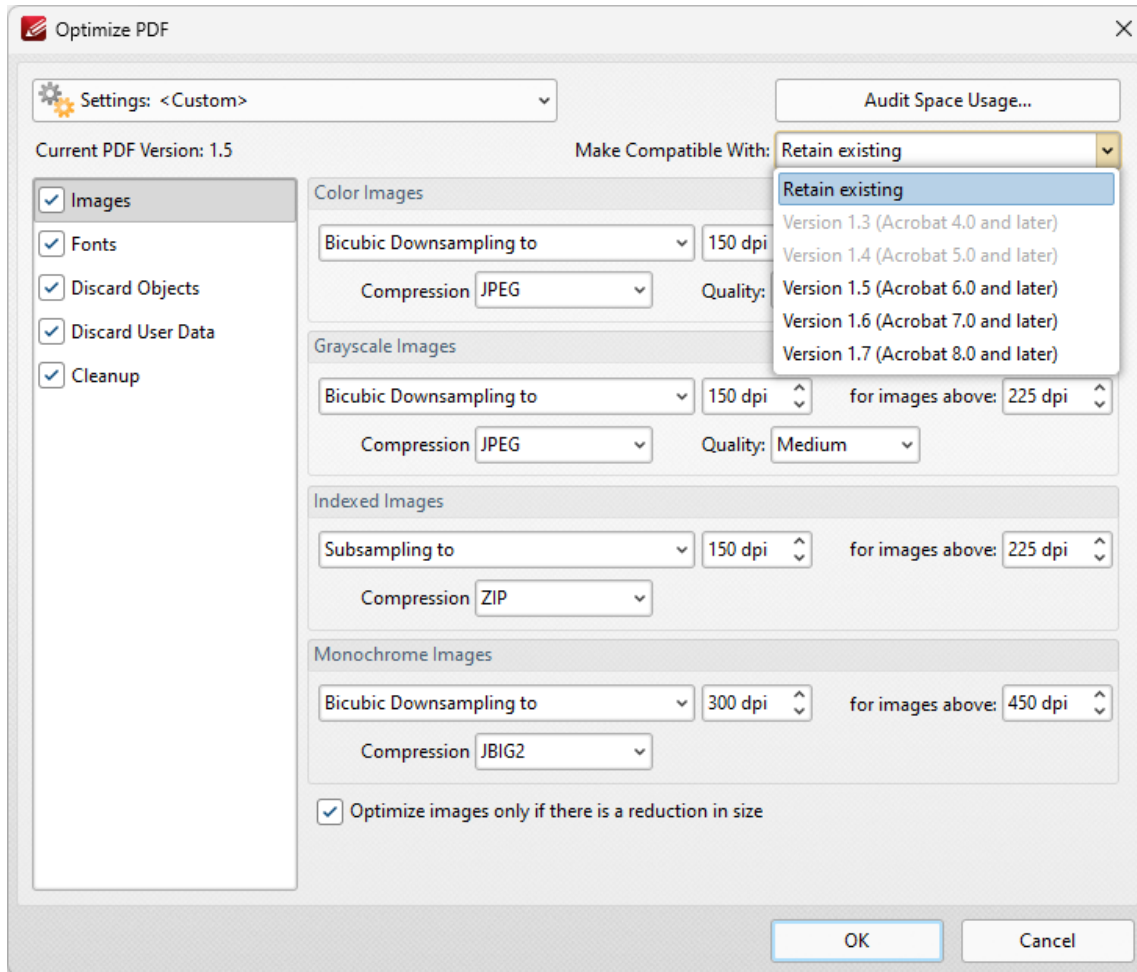
Figure 10. Optimize PDF Dialog Box, Make Compatible Dropdown Menu

Click **Audit Space Usage** to view a breakdown of the space used in the document.

Click **OK** to save changes.

5.1.4 **New Document**

New Document

Hover over **New Document** to open the following submenu:
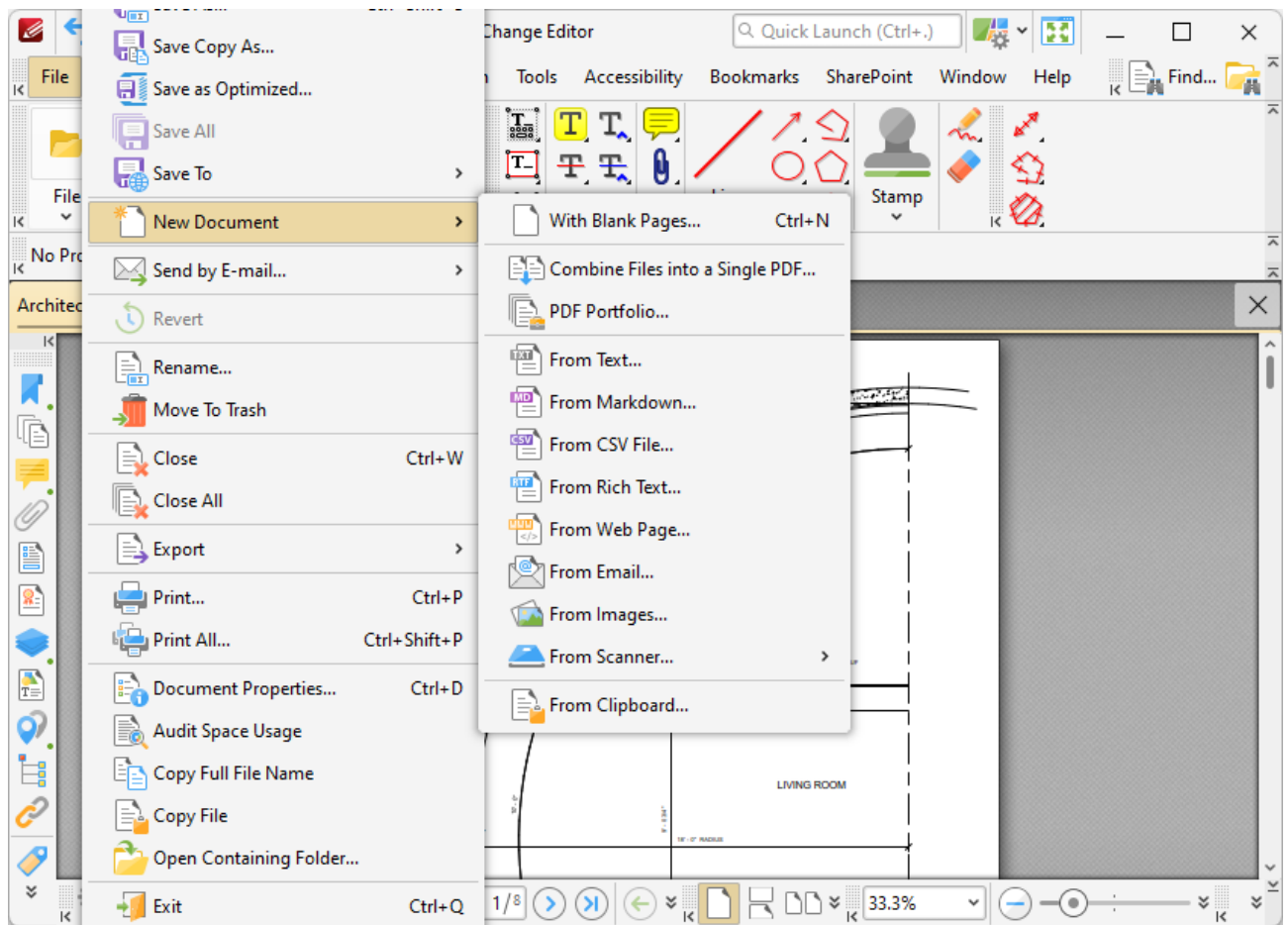
Figure 1. File Tab Submenu, New Document Options

These options facilitate the creation of new documents:

- **With Blank Pages**[111]
- **Combine Files into a Single PDF**[112]
- **PDF Portfolio**[116]

- **From Text Files** 120
- **From Markdown** 125
- **From CSV File** 128
- **From Rich Text** 131
- **From Web Page** 134
- **From Email**
- **From Images** 140
- **From Scanner** 152
- **From Clipboard** 156

5.1.4.1   With Blank Pages

With Blank Pages

Click **With Blank Pages** to create a blank document. The following dialog box will open:
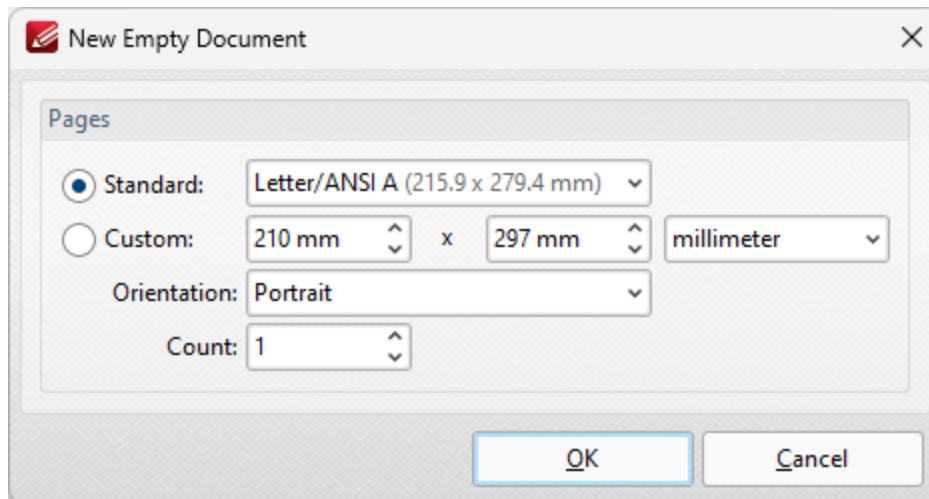
Figure 1. New Empty Document Dialog Box

- 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 create the new document.

5.1.4.2 Combine Files Into A Single PDF

Combine Files Into A Single PDF

Click **Combine Files Into a Single PDF** to create a single PDF document from multiple PDF documents:
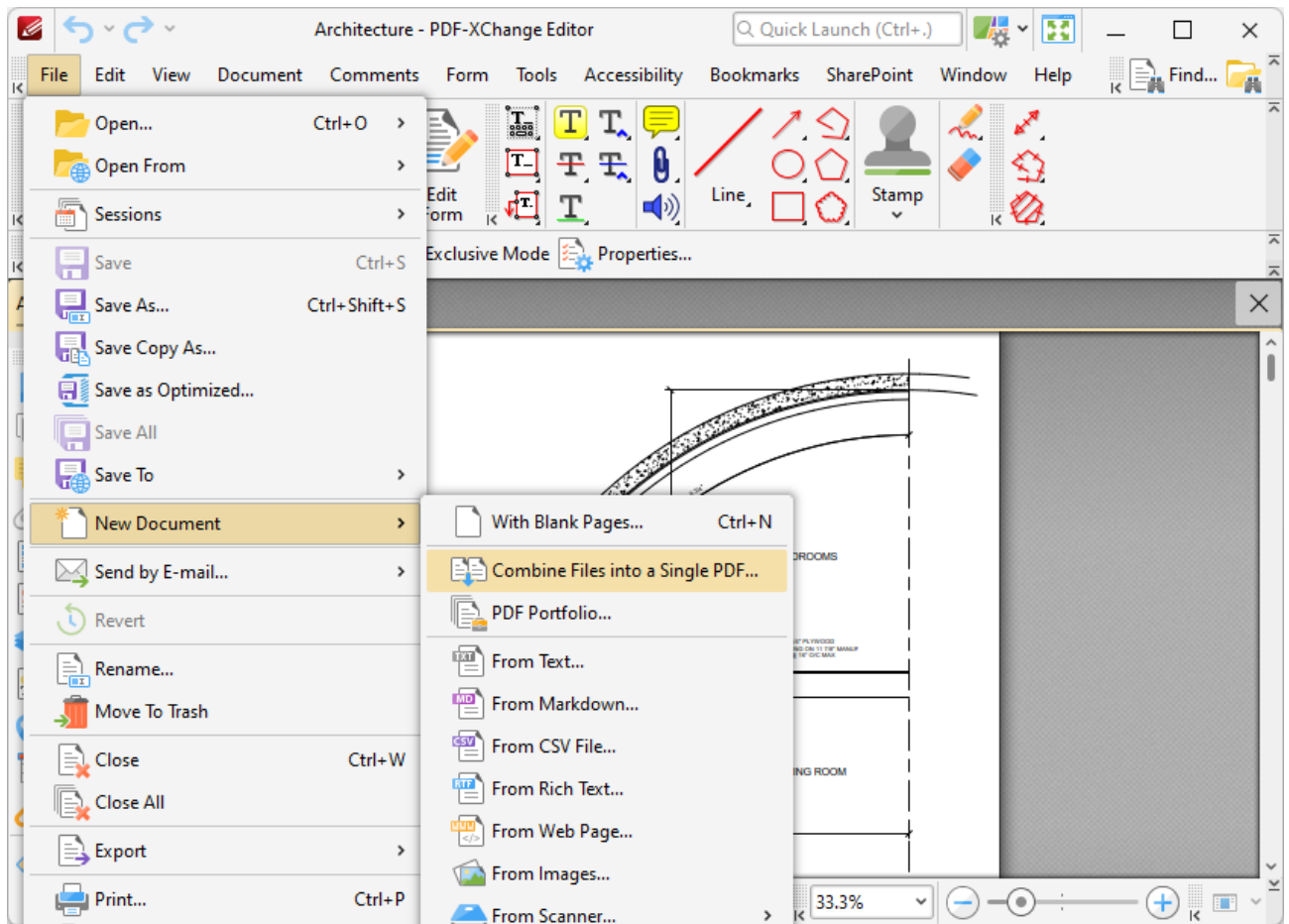
Figure 1. New Document Submenu, Combine Files into a Single PDF

The **Combine Files** dialog box will open:
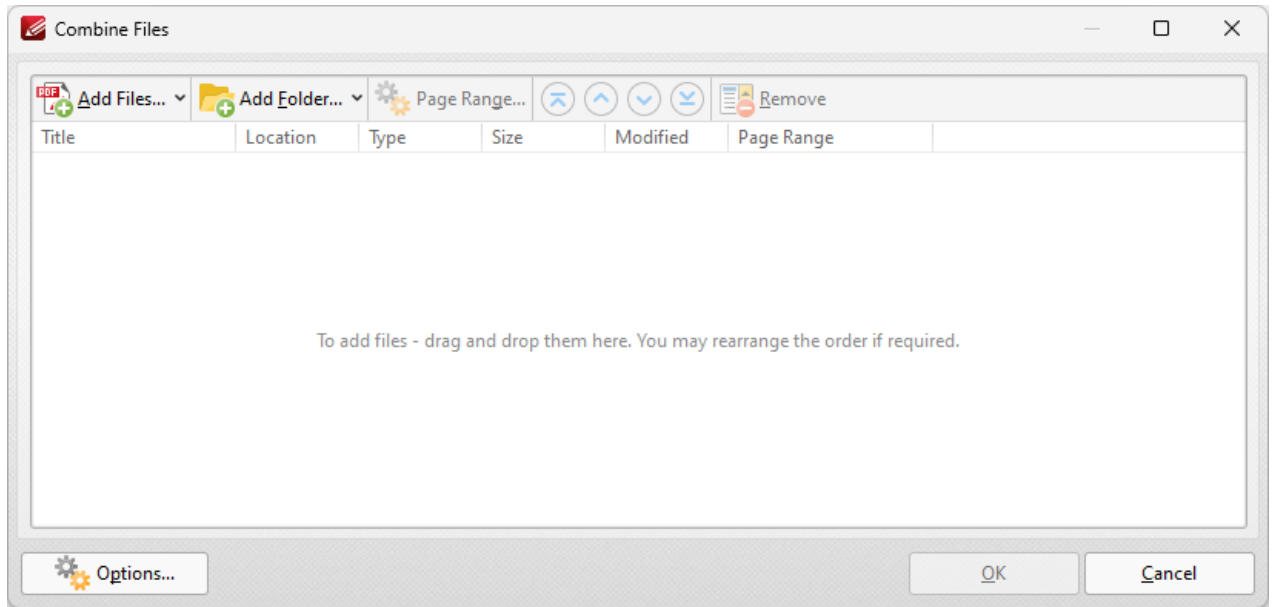
Figure 2. Combine Files Dialog Box

- Click **Add Files** to select individual files from the local computer to add to the list of source files. Click the dropdown arrow for additional options:
    - Click **Add All Opened Documents in Opened Order** to add all open documents in the order in which they were opened.
    - Click **Add All Opened Documents in the Current Tab Order** to add all open documents in their current order in the document tab.
- 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 3)*.
- Click **Page Range** to determine the page range of selected documents. Page range settings are explained **here.** 1274
- Use the arrow icons (or click and drag) to reorder selected documents in the list. This determines the order in which they appear in the new document.
- 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 3. 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 **Include Subfolders** box to include subfolders of the parent folder when the software searches for files to add to the list of source files.
- Select the **Select 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 **Add Custom Filter** to open the **Add Custom Filter** dialog box:

Figure 4. 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.

5.1.4.3 PDF Portfolio

 PDF Portfolio

PDF portfolio files are a unique format of PDF file in which multiple files are assembled into an integrated PDF unit for convenience of use. Click **PDF Portfolio** to create a PDF portfolio file:
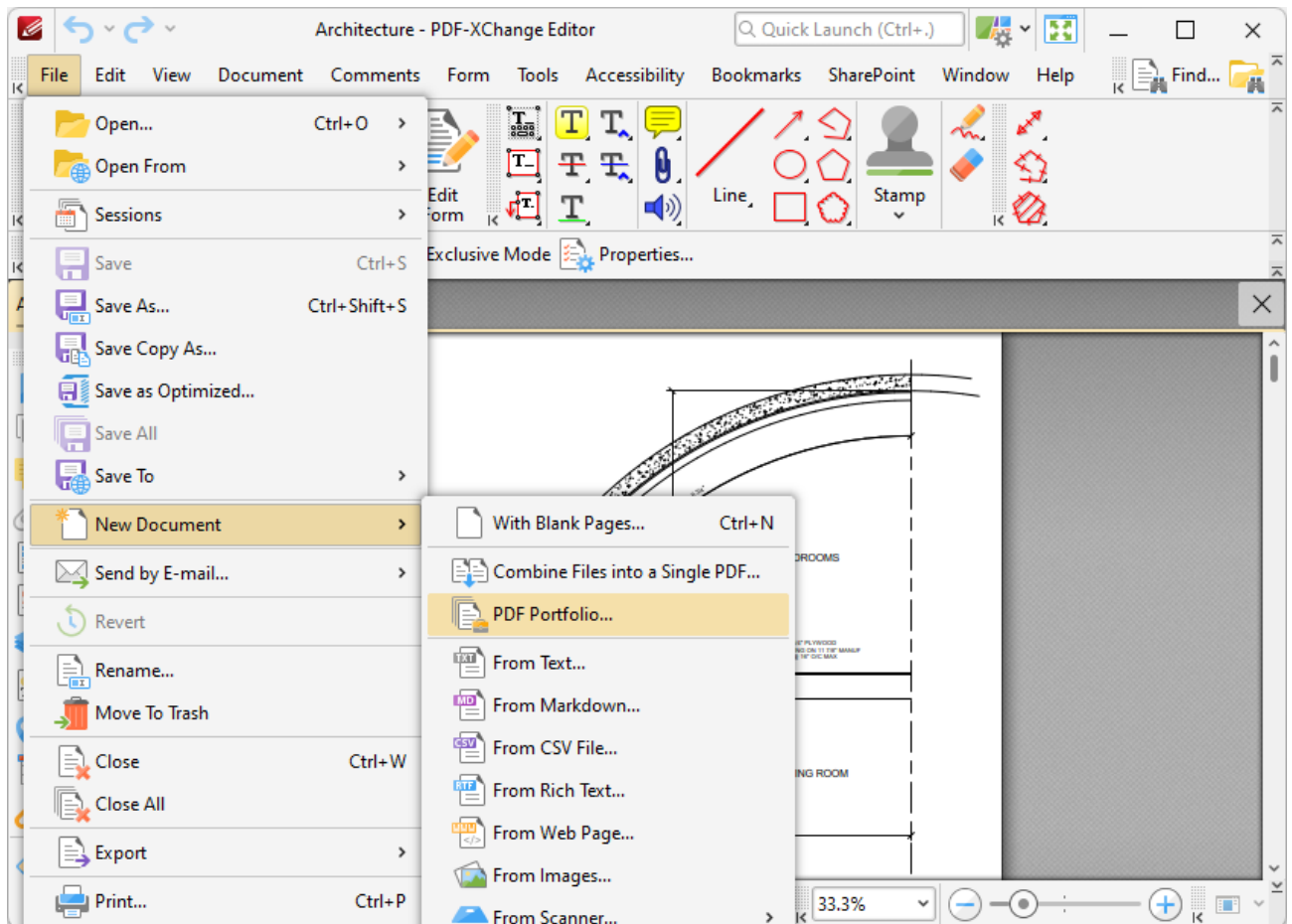
Figure 1. New Document Submenu, PDF Portfolio

The **Create PDF Portfolio** dialog box will open:
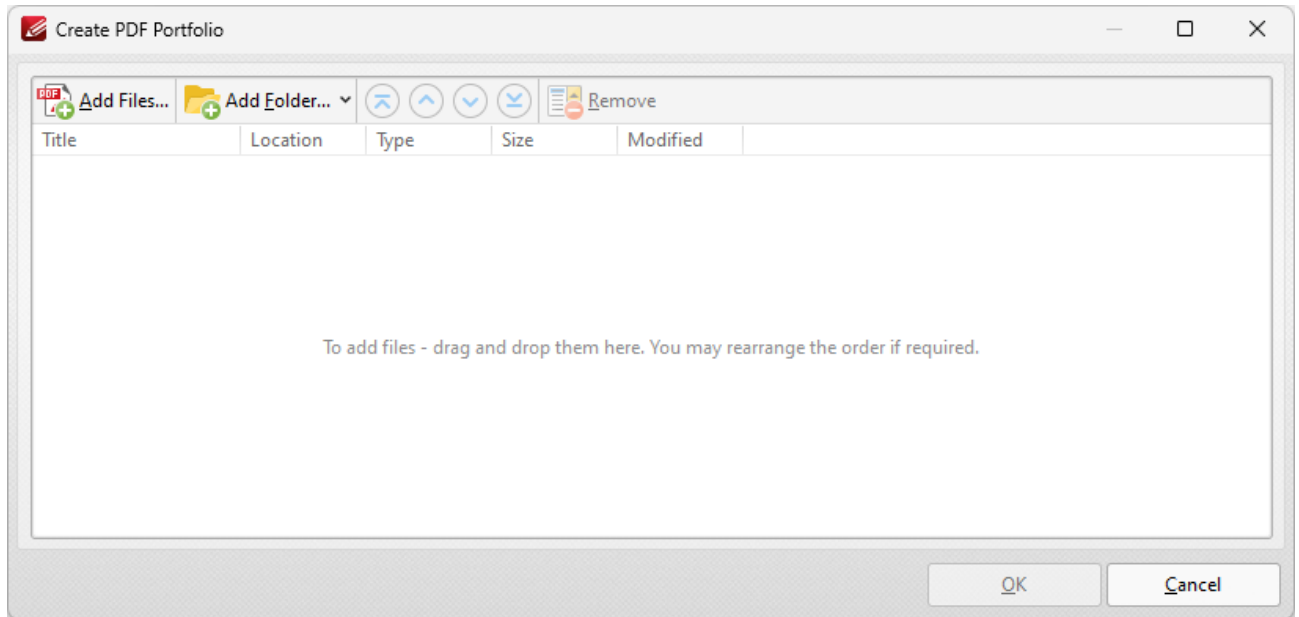
Figure 2. Create PDF Portfolio Dialog Box

- Click **Add Files** to select files from the local computer to add to the portfolio file.
- Click **Add Folder** to add entire folders to the list of source files used to create the portfolio file. 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 3)*.
- Use the arrow icons to reorder selected documents in the list. This determines the order in which they appear in the portfolio file.

Figure 3. 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 **Include Subfolders** box to include subfolders of the parent folder when the software searches for files to add to the list of source files.
- Select the **Select 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 **Add Custom Filter** to open the **Add Custom Filter** dialog box:

Figure 4. 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.

5.1.4.4 From Text Files

From Text Files

Click **From Text Files** to convert text files into PDF:
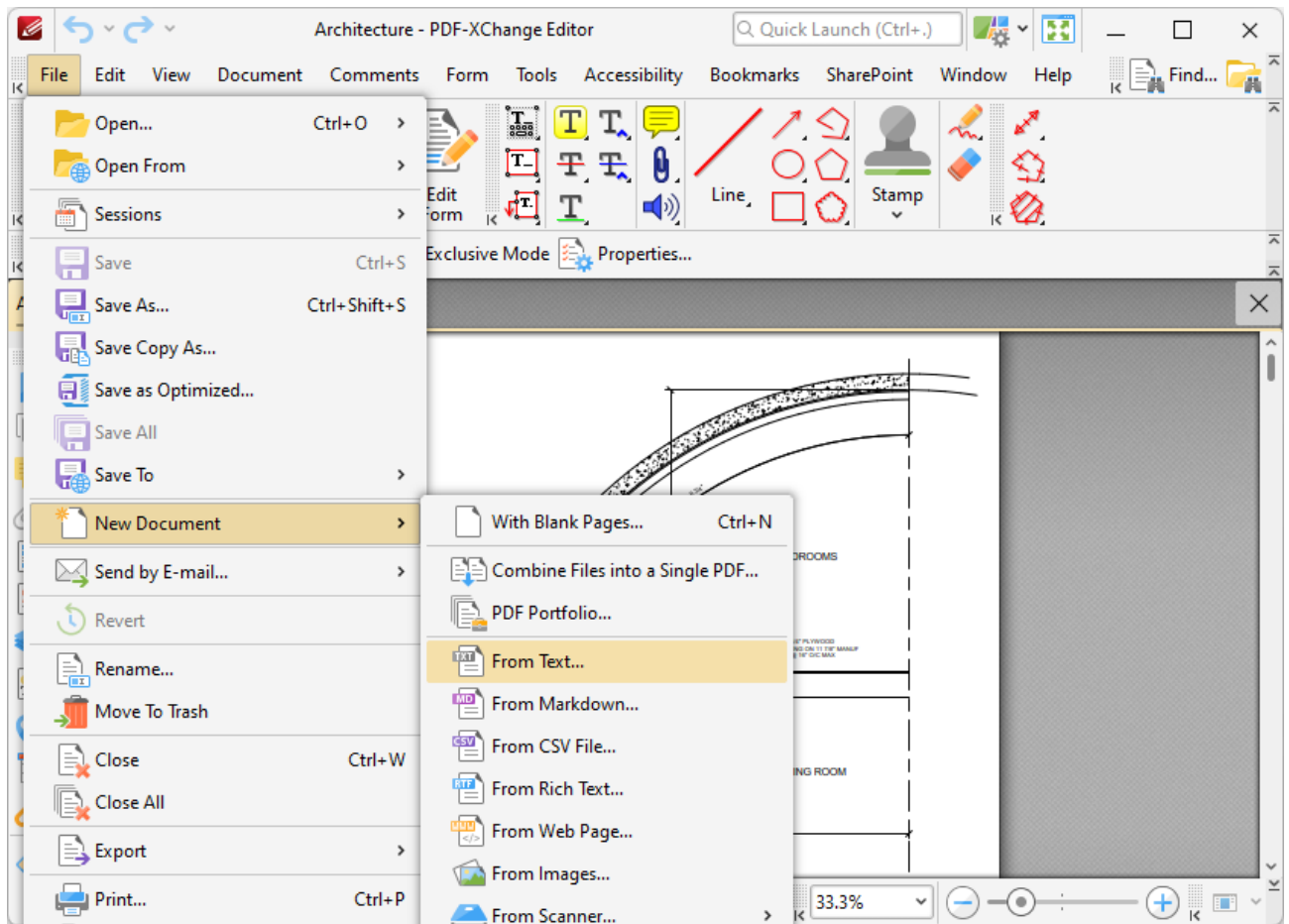
Figure 1. New Document Submenu, From Text Files

The **Convert Text Files to PDF** dialog box will open:
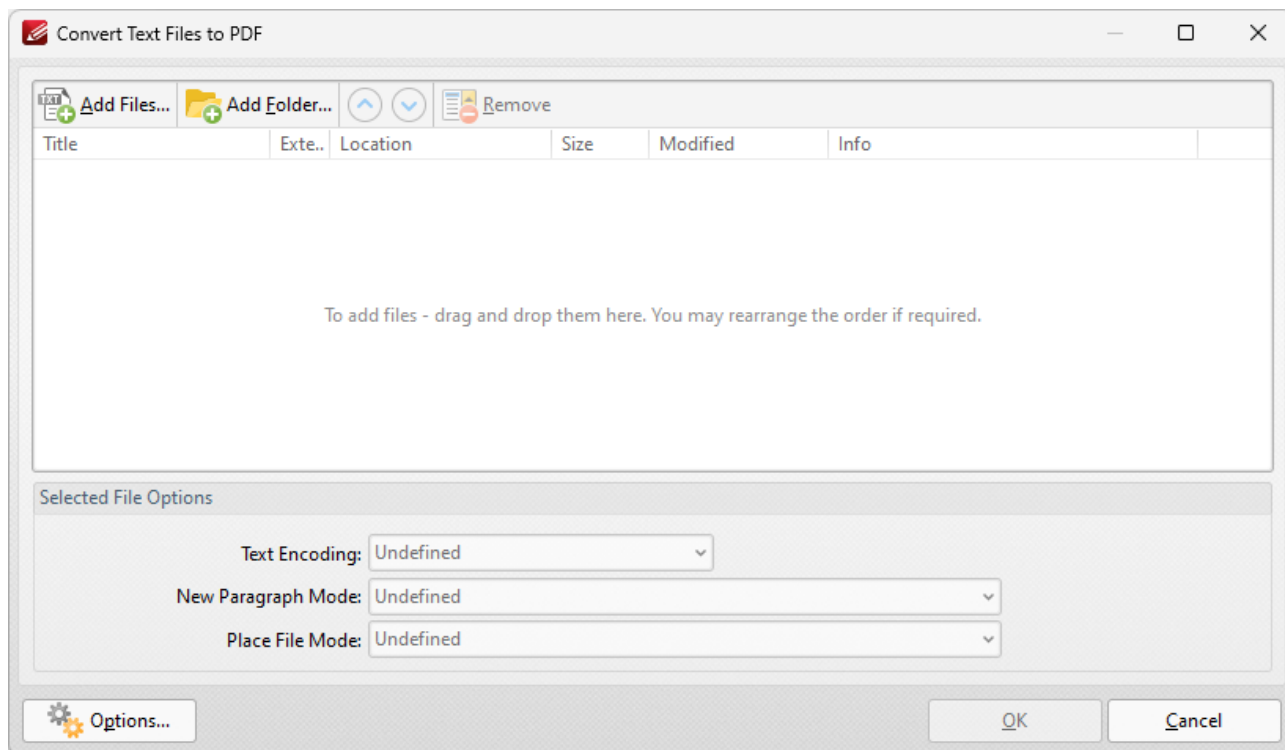
Figure 2. Convert Text Files to PDF Dialog Box

The options in this section are the same as those outlined in the **Combine Files into a Single PDF** 112 section, with the difference that files must be in plain text **(*.txt)** format. There are also additional options 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:
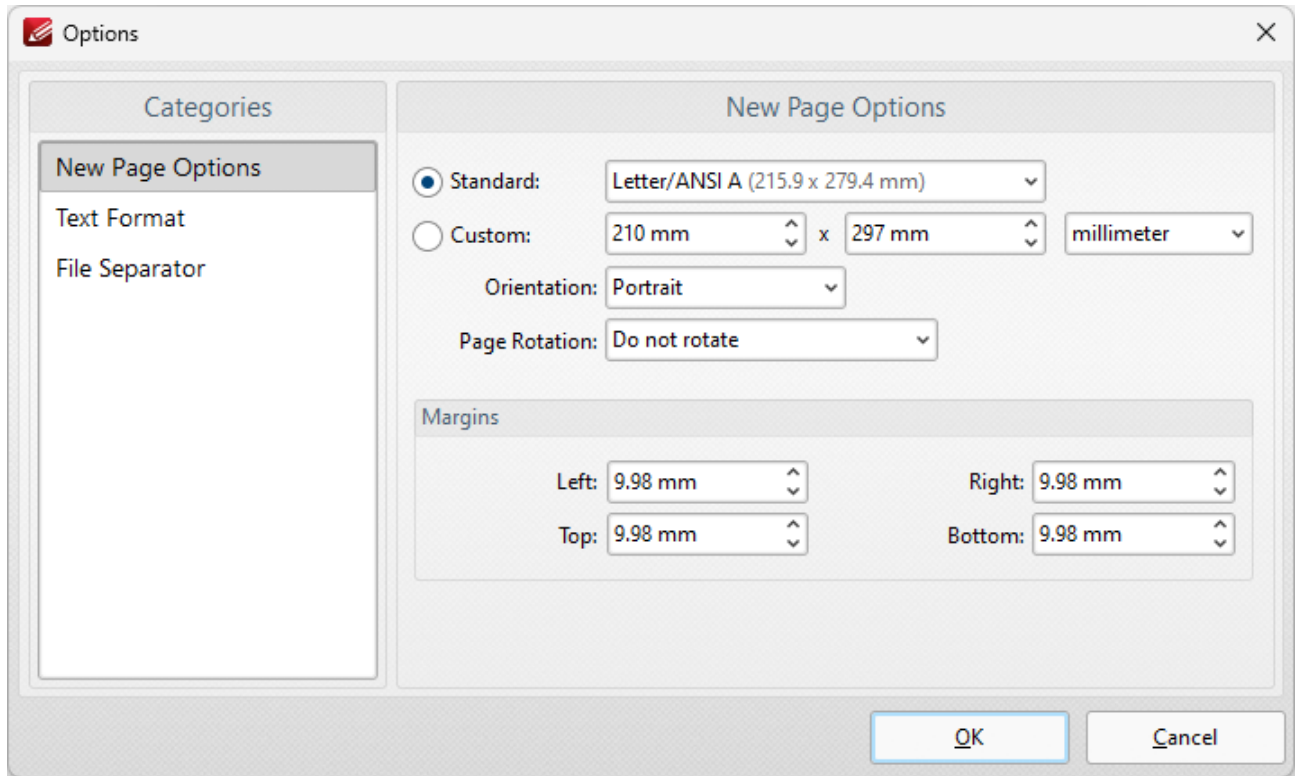
Figure 3. Options Dialog Box

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:
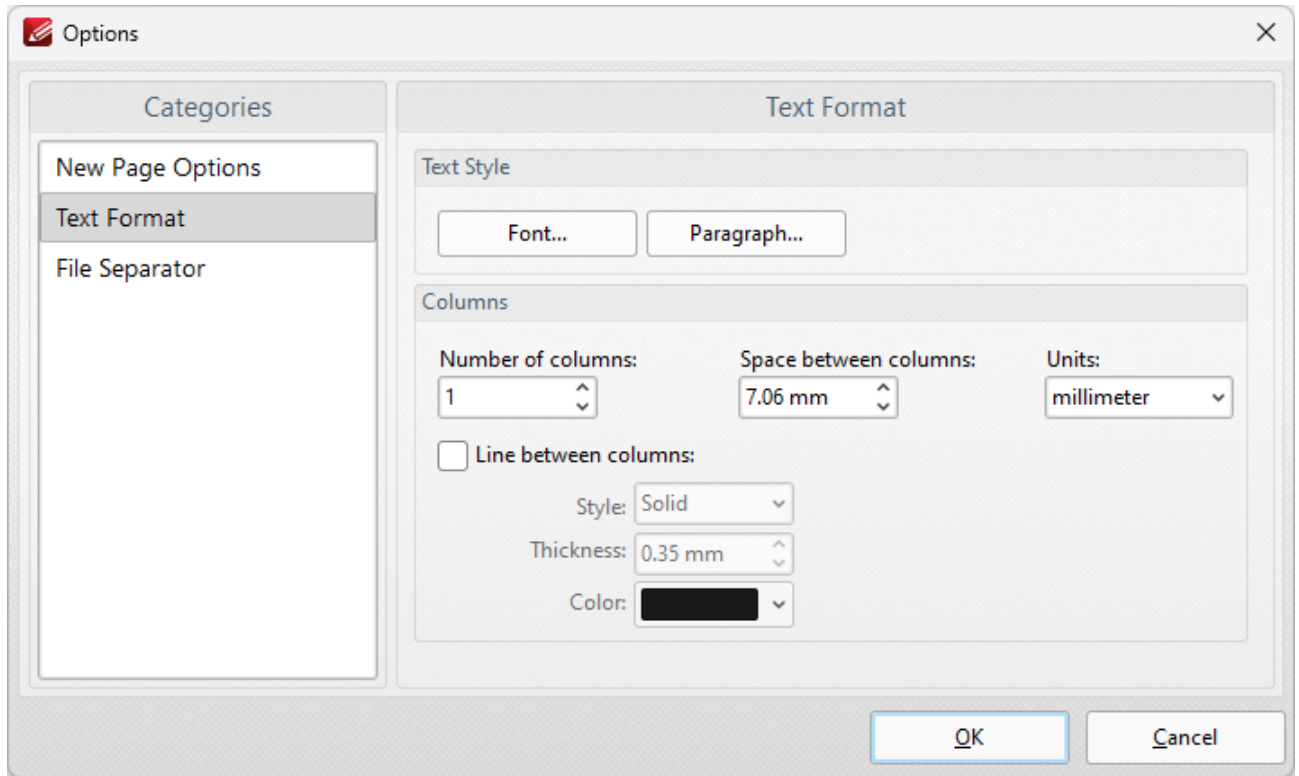
Figure 4. Text Format Options

- 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:
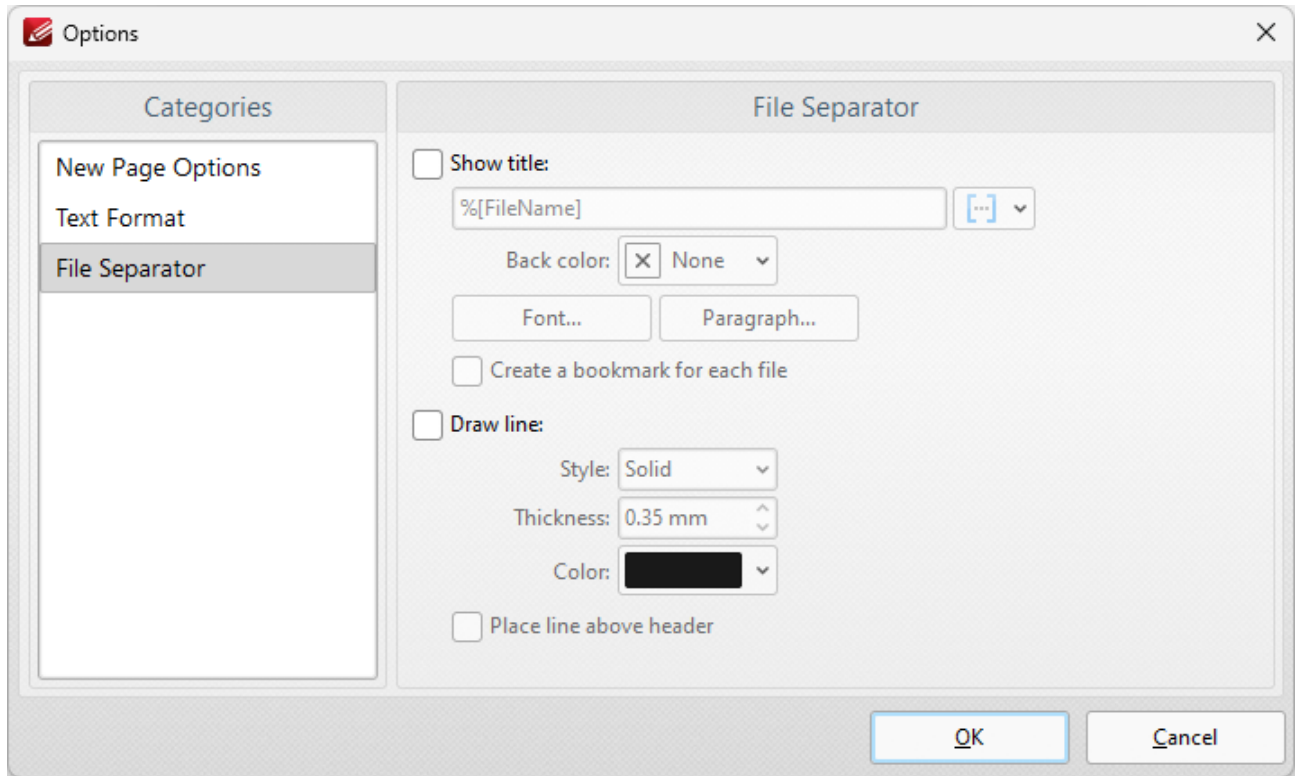
Figure 5. File Separator Options

- Select the **Show title** box to give the file separator a title. Click the icon to add **macros.** 1157
- 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.

5.1.4.5 From Markdown

 From Markdown

Click **From Markdown** to convert Markdown files into PDF format:
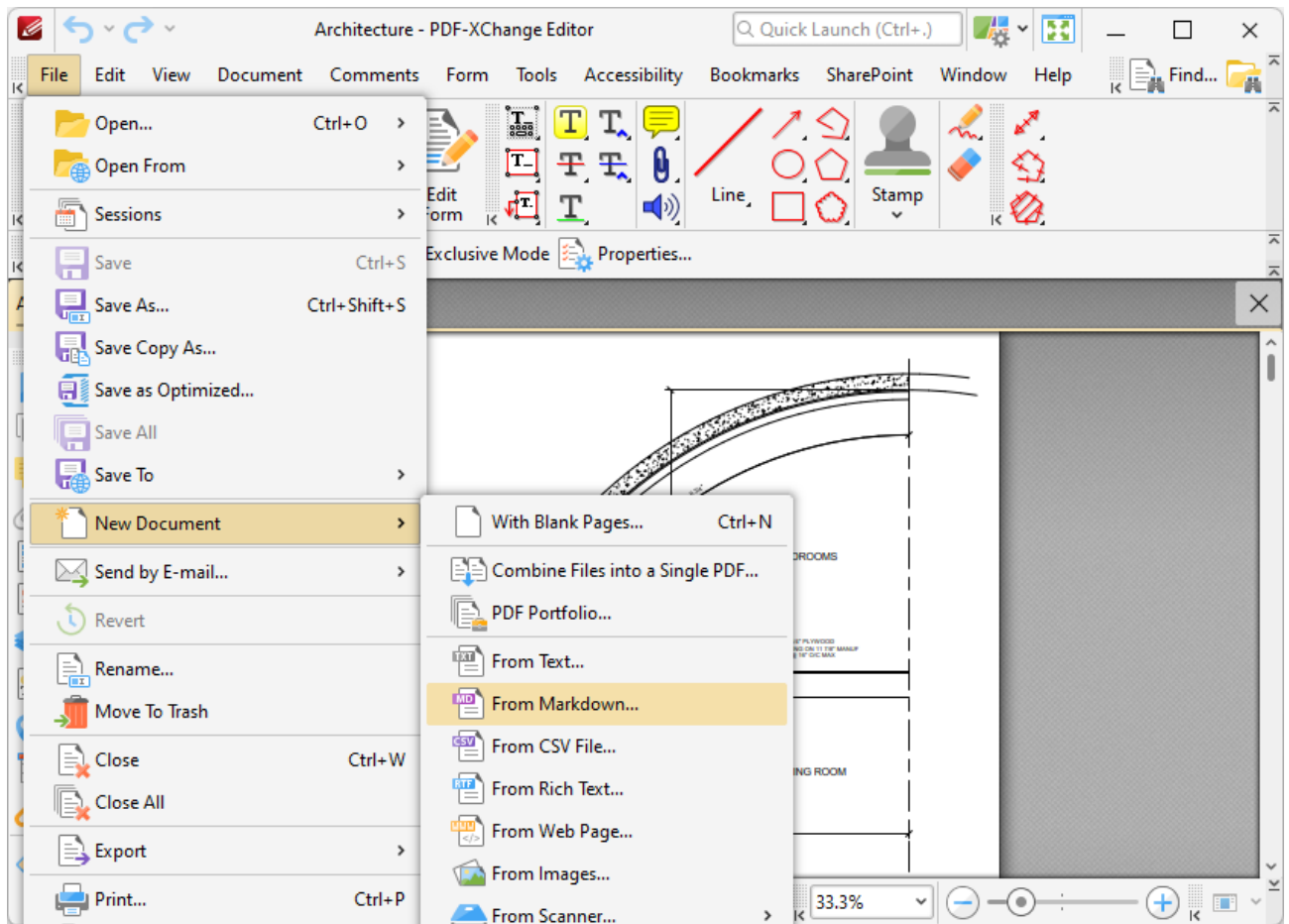
Figure 1. New Document Submenu, From Markdown

The **Convert Markdown to PDF** dialog box will open:
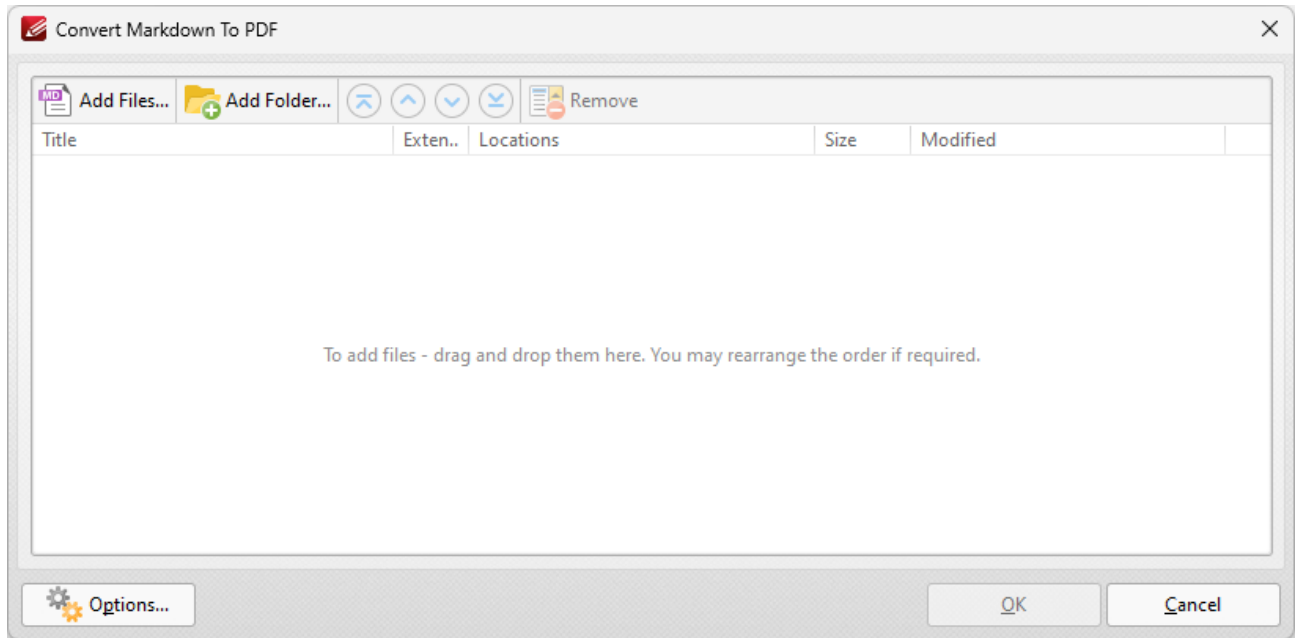
Figure 2. Convert Markdown to PDF Dialog Box

- Click **Add Files** to add markdown files to the list of source files.
- Click **Add Folder** to add 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:
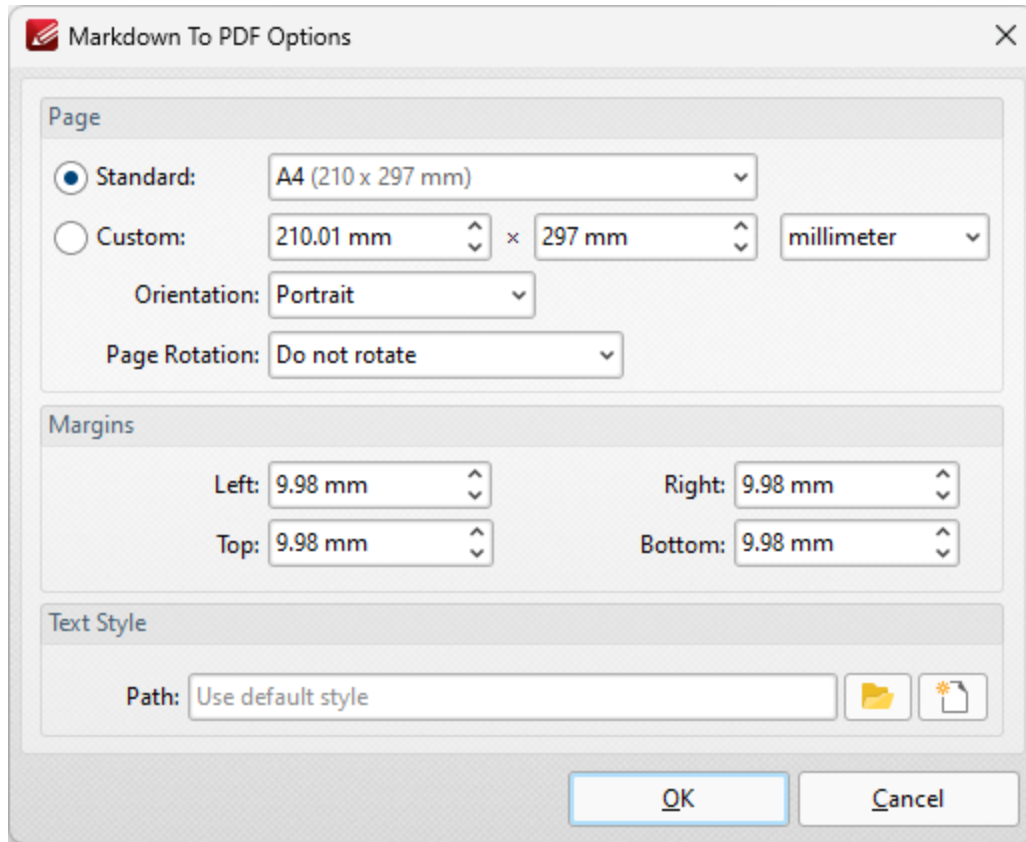
Figure 3. New Page Options Dialog Box

- 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 files when they are converted.
- The **Margins** options facilitate the customization of the file margins. Enter the values desired into the number boxes. The converted file will feature these dimensions.
- Use the **Path** text box to enter a preset style. Click the **Browse** button to select a Markdown style. Click the **Edit** button to edit an existing style.

Click **OK** to save settings.

5.1.4.6   From CSV File

From CSV File

Click **From CSV File** to convert CSV (comma separated values) files into PDF:
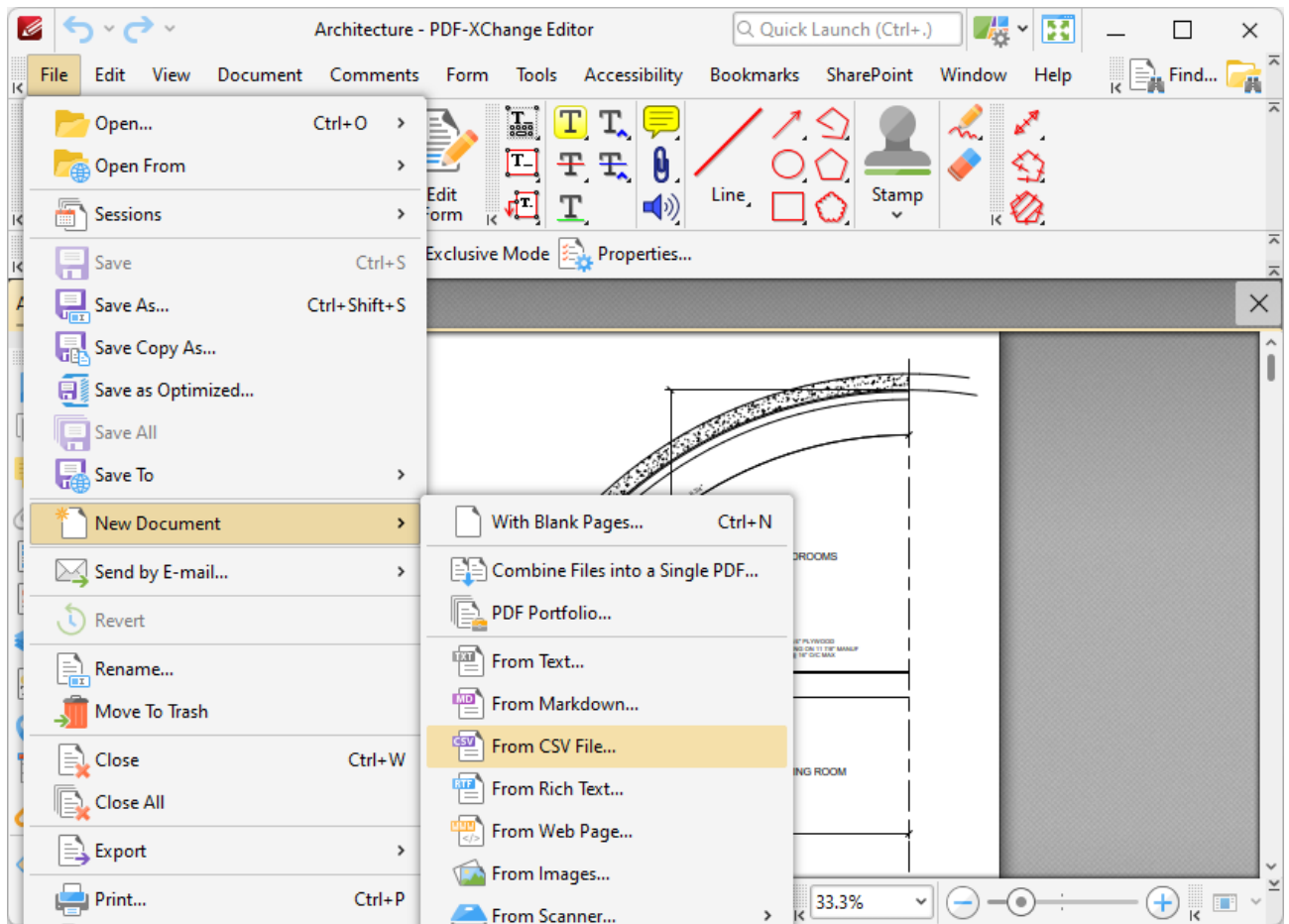
Figure 1. File Tab Submenu, New Document Options, From CSV File

The **Open Files** dialog box will open. Select the desired file and click **Open.** The **CSV to PDF** dialog box will open:
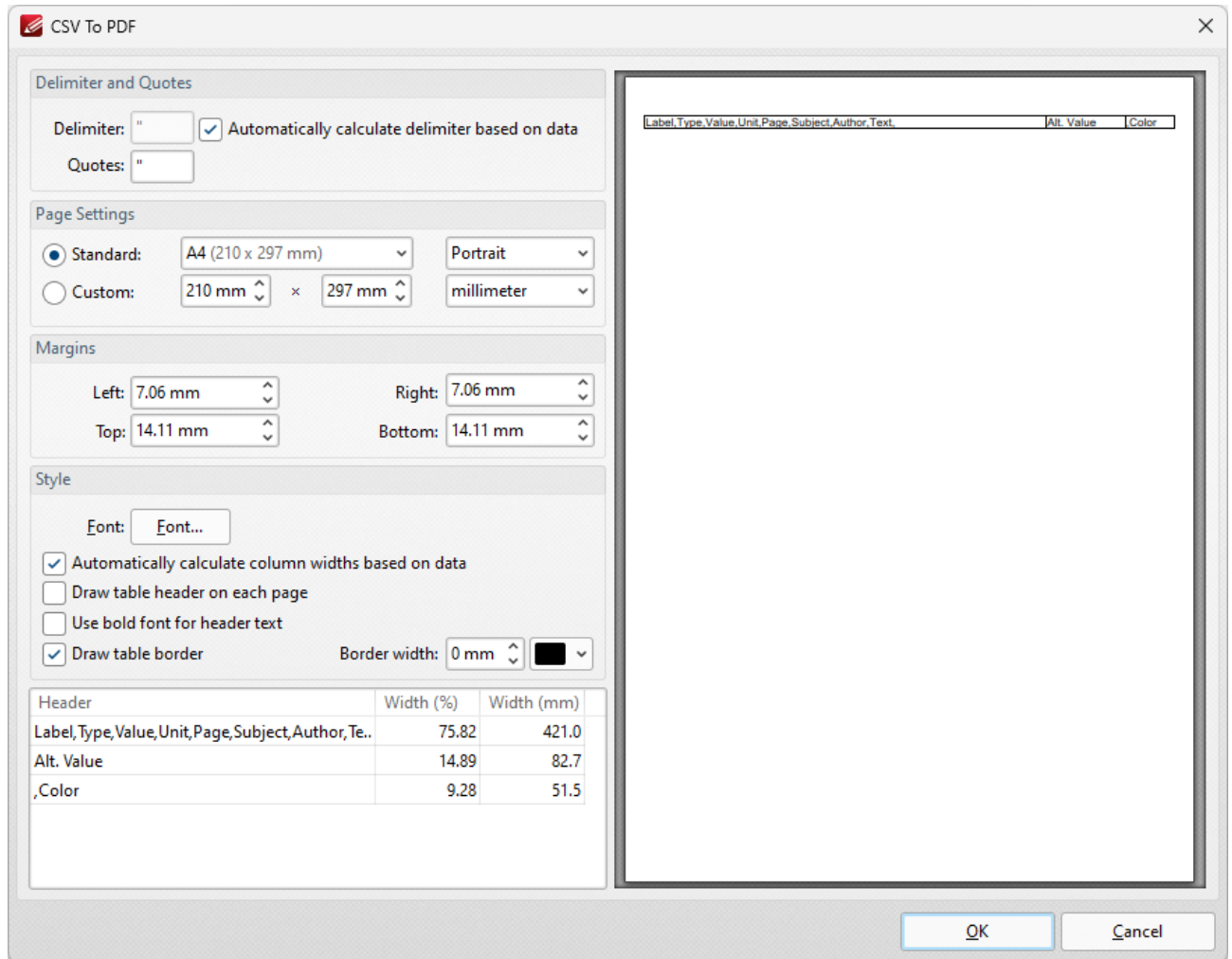
Figure 2. CSV to PDF Dialog Box

- Use the **Delimiter** box to specify the delimiter used in the input file to separate values, or select the adjacent check box to perform this operation automatically.
- Use the **Quotes** box to specify the character used to determine quotes in the input file.
- Select an option in the **Standard** dropdown menu to specify the page size of the output document, or use the **Custom** options to specify a custom page size.
- Use the orientation and units of measurement dropdown menus to specify the orientation and units of measurement used for the output document.
- Use the **Margins** number boxes to specify the margins of the output document.
- Click **Font** to determine font options for the output document, as detailed in *(figure 3)* below.
- Select the **Automatically calculate column widths based on data** box to calculate column widths according to the data in the source document.
- Select the **Draw table header on each page** and/or **Use bold font for header text** boxes as desired.
- Select the **Draw table border** box as desired, and use the **Border width** and color dropdown menus to determine the border width and color used for the table border.

Click **OK** to convert the csv file to PDF.
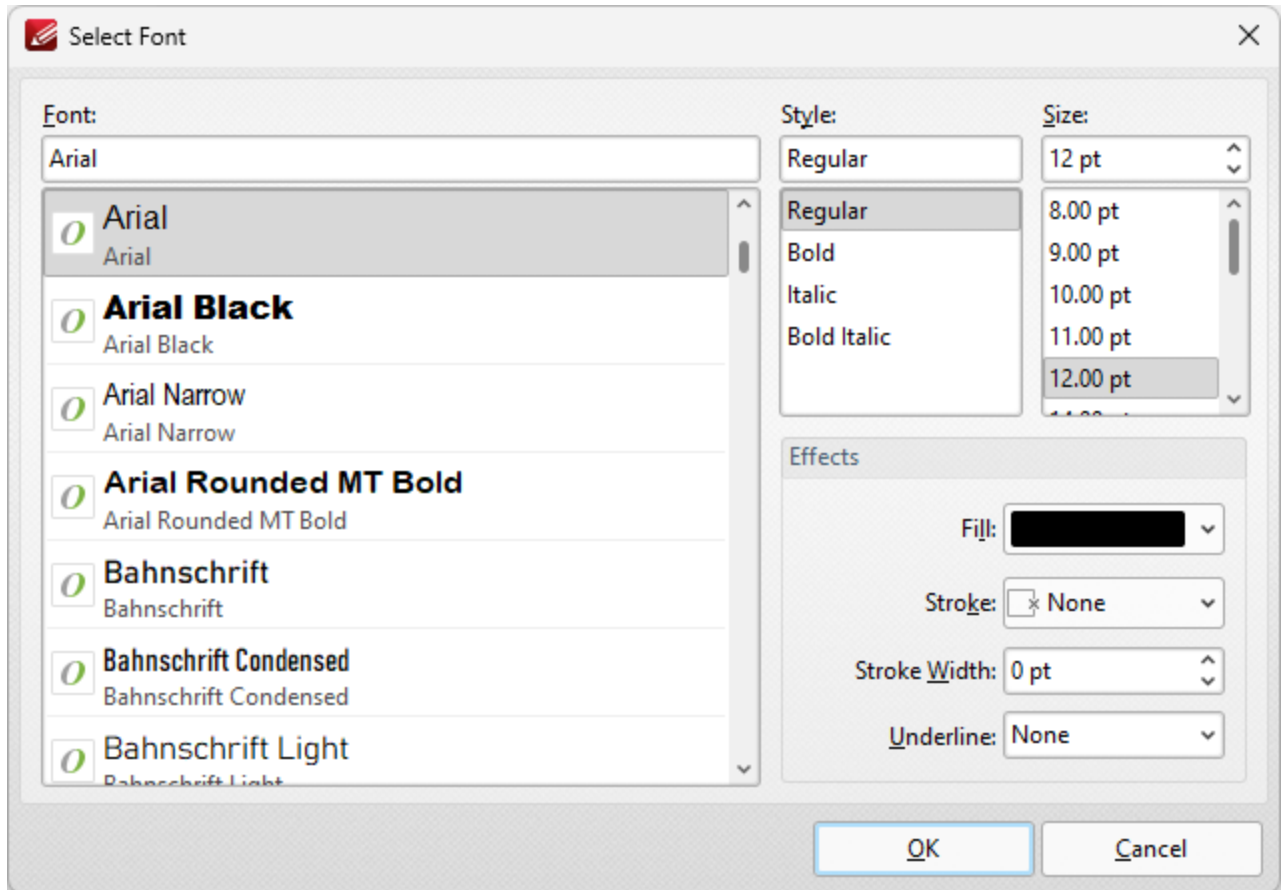
Figure 3. Select Font Dialog Box

- 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.

5.1.4.7   From Rich Text

From Rich Text

Click **From Rich Text Format (RTF) Files** to convert RTF files into PDF:
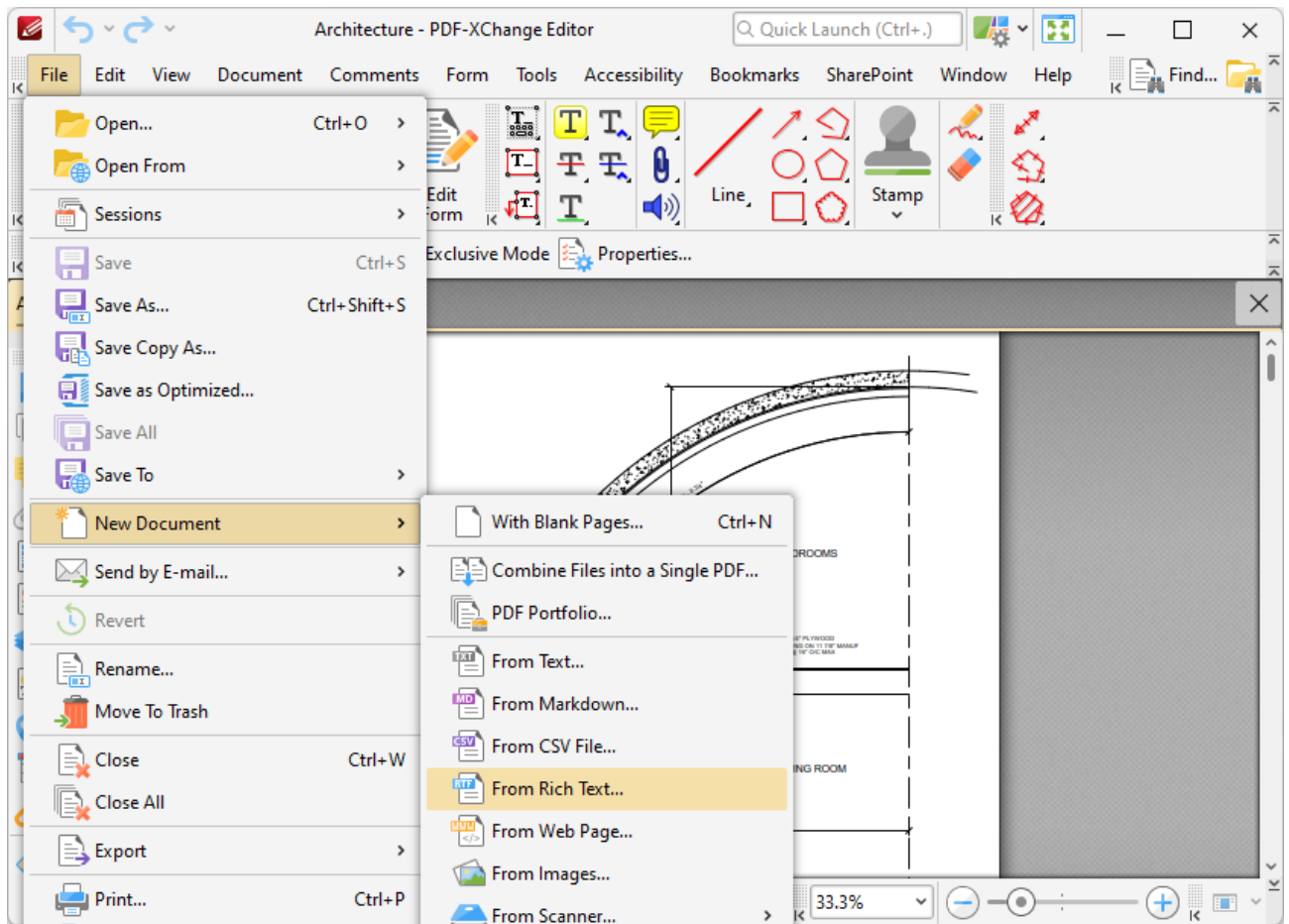
Figure 1. File Tab Submenu, New Document Options, From Rich Text Format File

The **Convert RTF Files to PDF** dialog box will open:
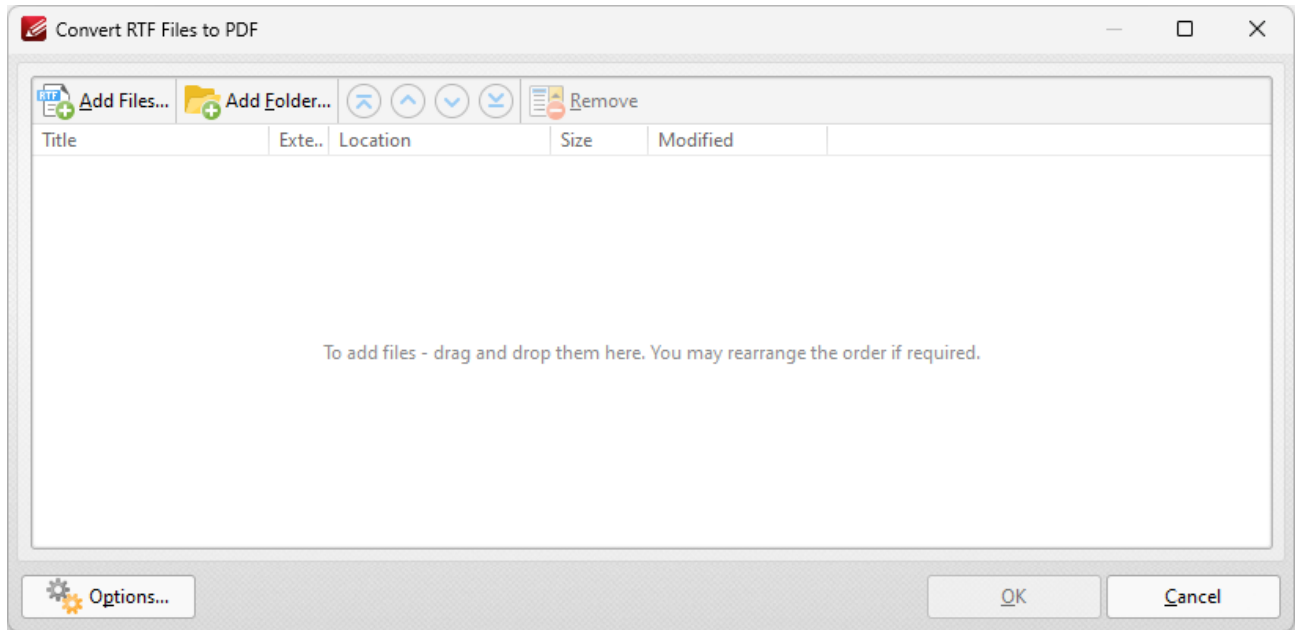
Figure 2. Convert RTF Files to PDF

The options are the same as those outlined in the **Combine Files into a Single PDF** [112] section with the differences that files must be in **(*.rtf)** format and the parameters are different when the **Options** button is selected:
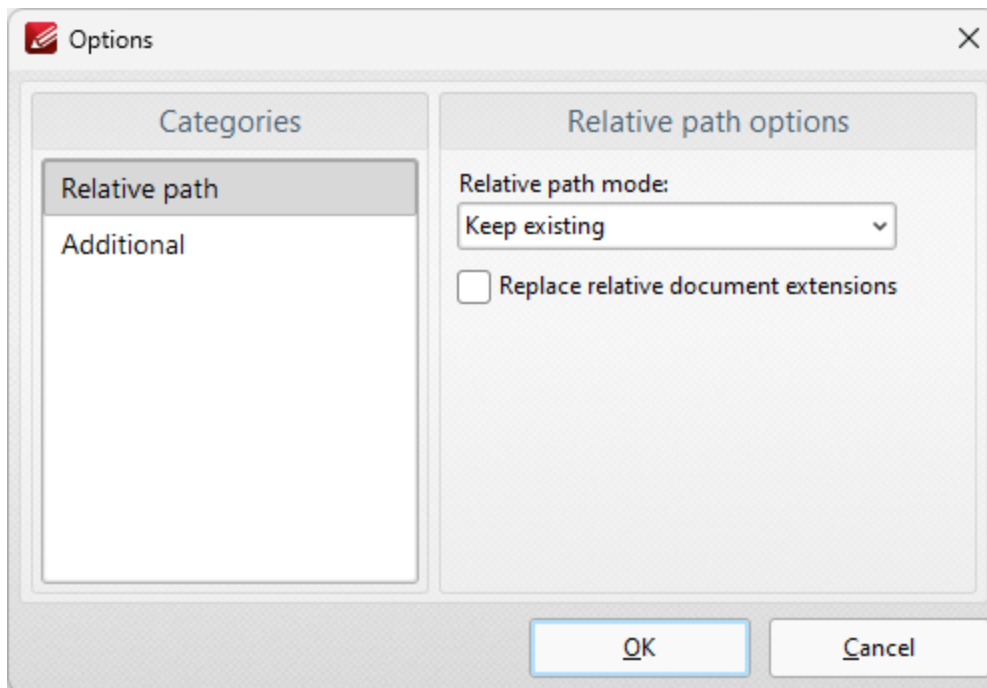
Figure 3. Convert RTF files to PDF Options

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.

5.1.4.8 From Web Page

From Web Page

Click **From Web Page** to convert web pages into PDF:
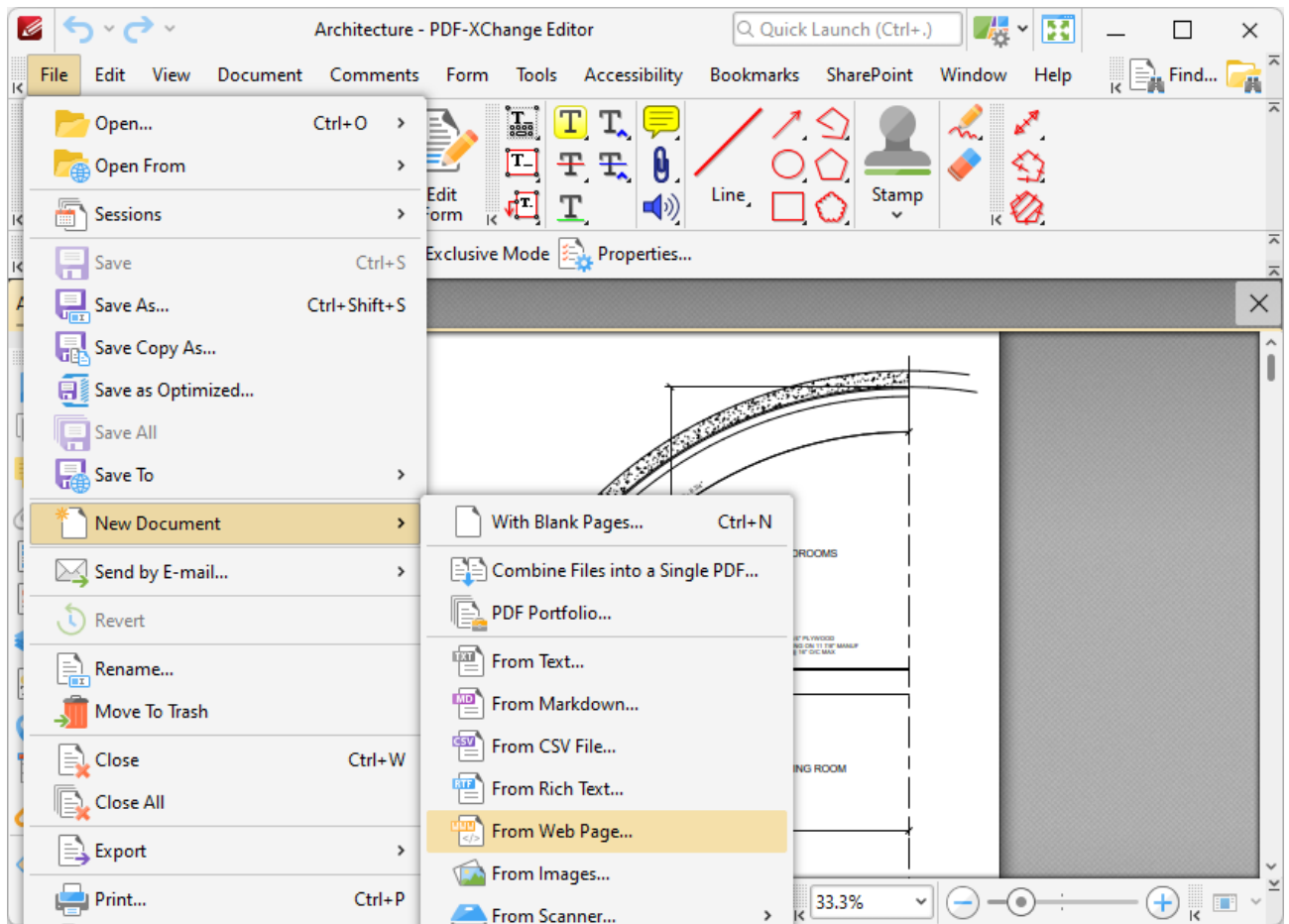
Figure 1. File Tab Submenu, New Document Options, From Web Page

The **Create PDF from Web Page** dialog box will open:
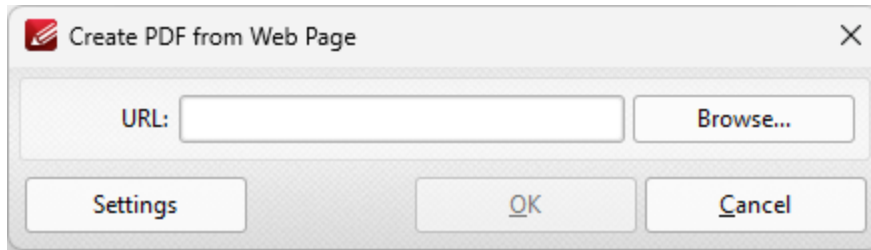
Figure 2. Convert RTF Files to PDF Dialog Box

- Enter the URL of the web page you want to convert to PDF, then click **OK** to perform the conversion.
- Click **Browse** to select a file on your machine to convert to PDF.
- Click **Settings** to view additional settings for converting web pages to PDF. The **Html to PDF Options** dialog box will open:
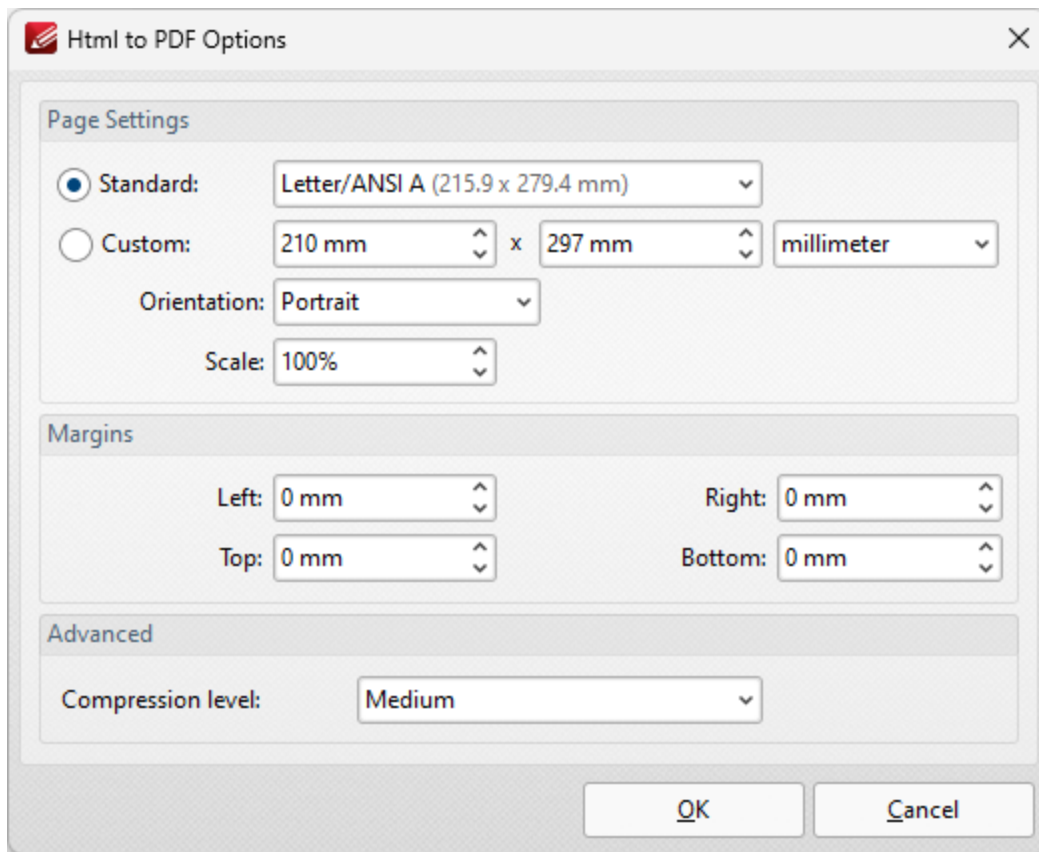
Figure 3. Html to PDF Options Dialog Box

- Select the **Standard** button to create a document using a standard size, then select the desired size from the dropdown menu.
- Select the **Custom** button to create a document using a custom size, then use the adjacent boxes to determine the size of the document.
- Use the **Margins** number boxes to specify the margins in the document.

- Use the **Compression level** dropdown menu to determine the level of compression used in the document.

Click **OK** to save settings.

5.1.4.9 From Email

From Email

Click **From Email** to convert email files into PDF:
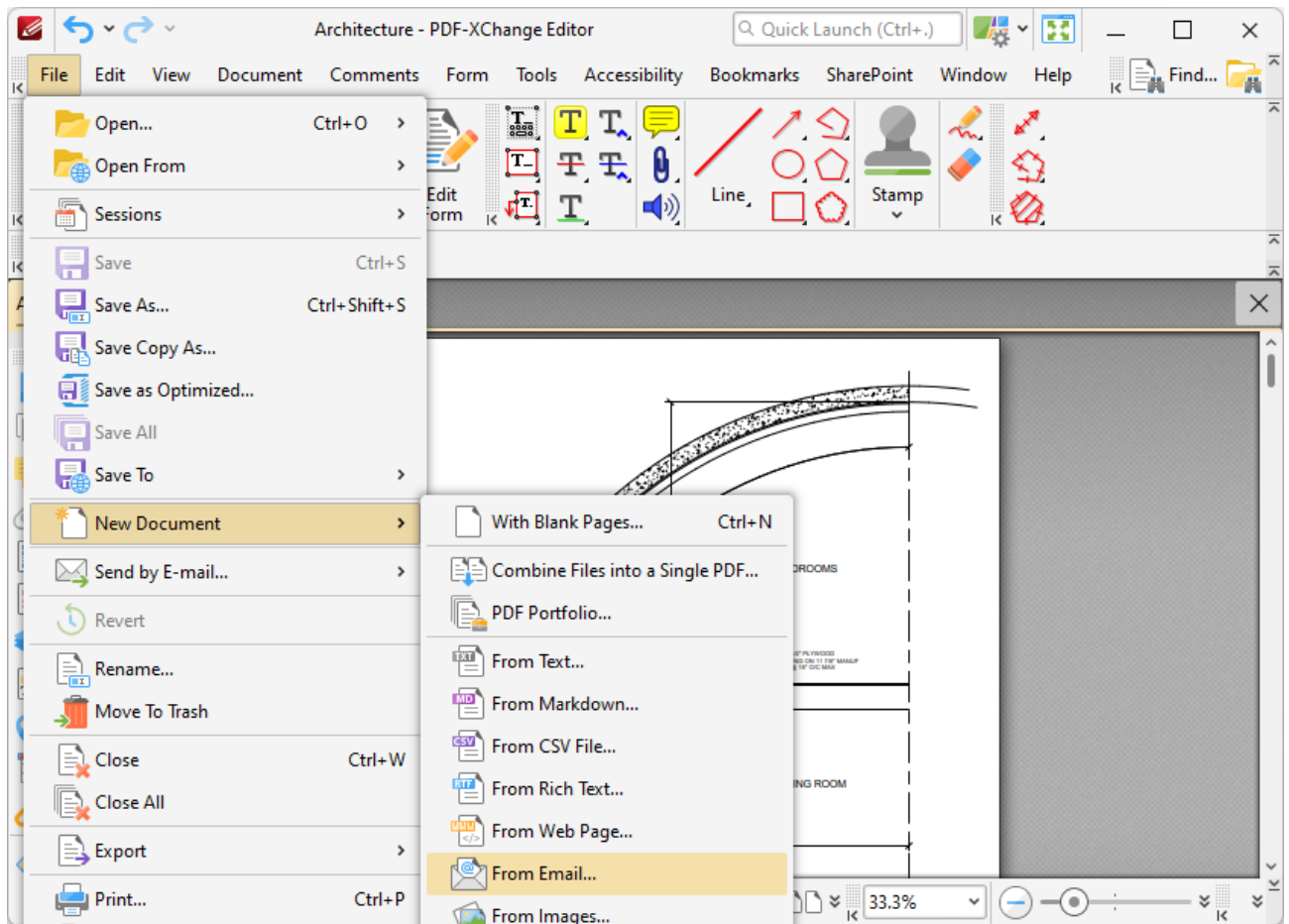
Figure 1. File Tab Submenu, New Document Options, From Email

The **Convert Email Files to PDF** dialog box will open:
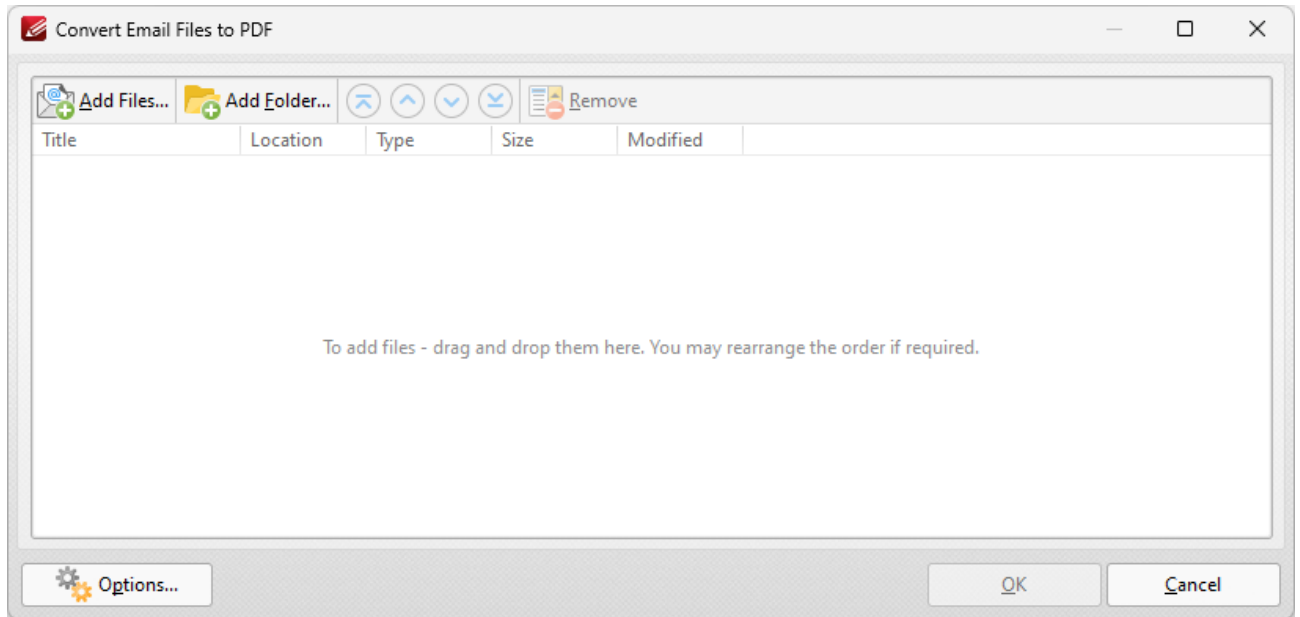
Figure 2. Convert Email Files to PDF Dialog Box

- Click **Add Files** to select 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.
- Use the arrow icons (or click and drag) to reorder selected documents in the list. This determines the order in which they appear in the new document.
- Click **Options** to determine document output options:
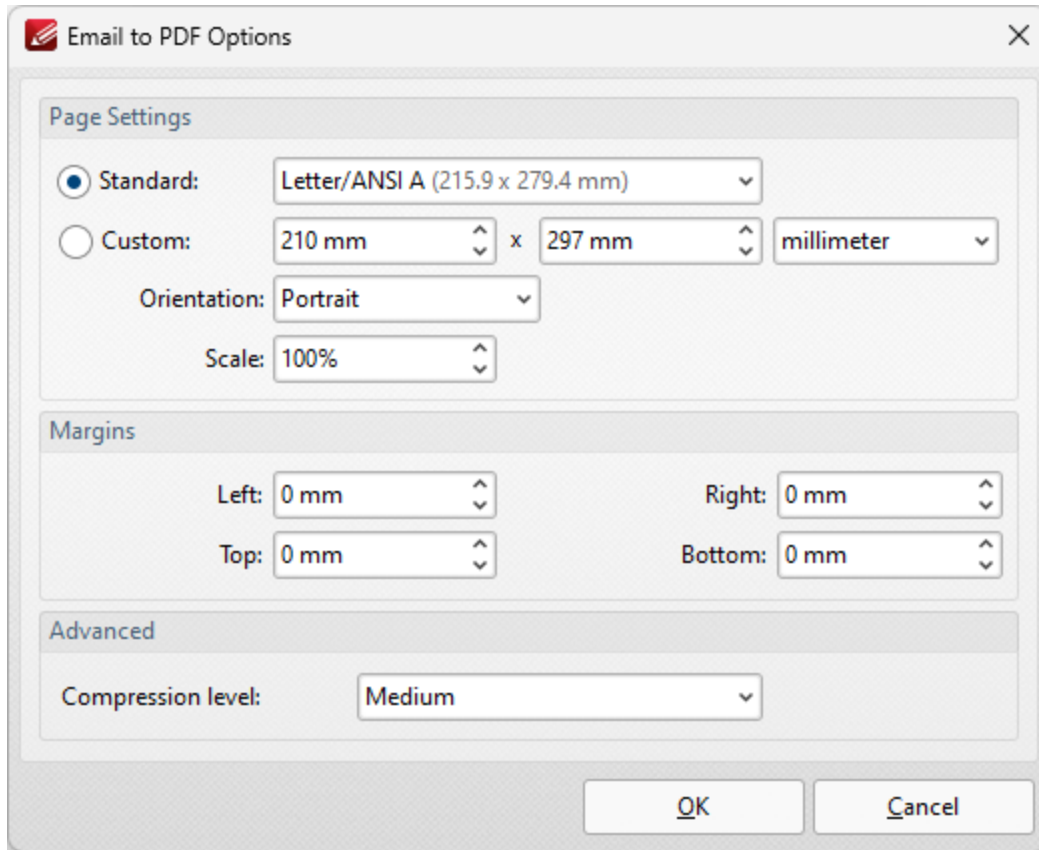
Figure 3. Email to PDF Options Dialog Box

- Select **Standard** to create a document using a standard **ISO** size, then select an option in the dropdown menu.
- Select **Custom** to create a custom document, then enter the desired dimensions in the number boxes and units of measurement dropdown menu.
- Use the **Orientation** and **Scale** boxes to determine the orientation and scale of the document as desired.
- Use the **Margins** number boxes to determine the margins for the document.
- Use the **Compression** dropdown menu to determine the compression used for the the document.

Click **OK** to create the document.

5.1.4.10   From Images

From Image Files

Click **From Image Files** to convert image files into PDF format:
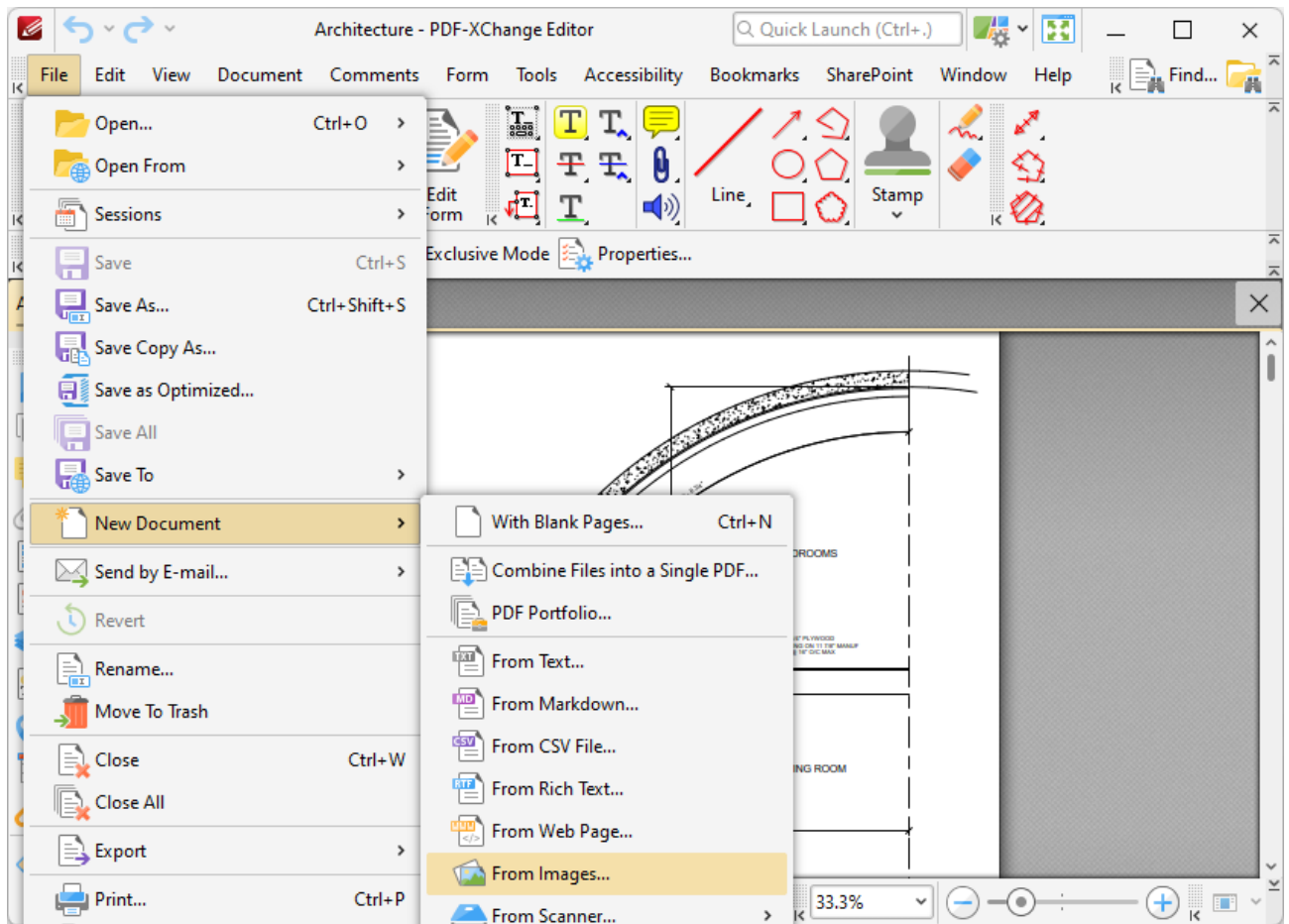
Figure 1. New Document Submenu, From Image Files

The **Image to PDF** dialog box will open:
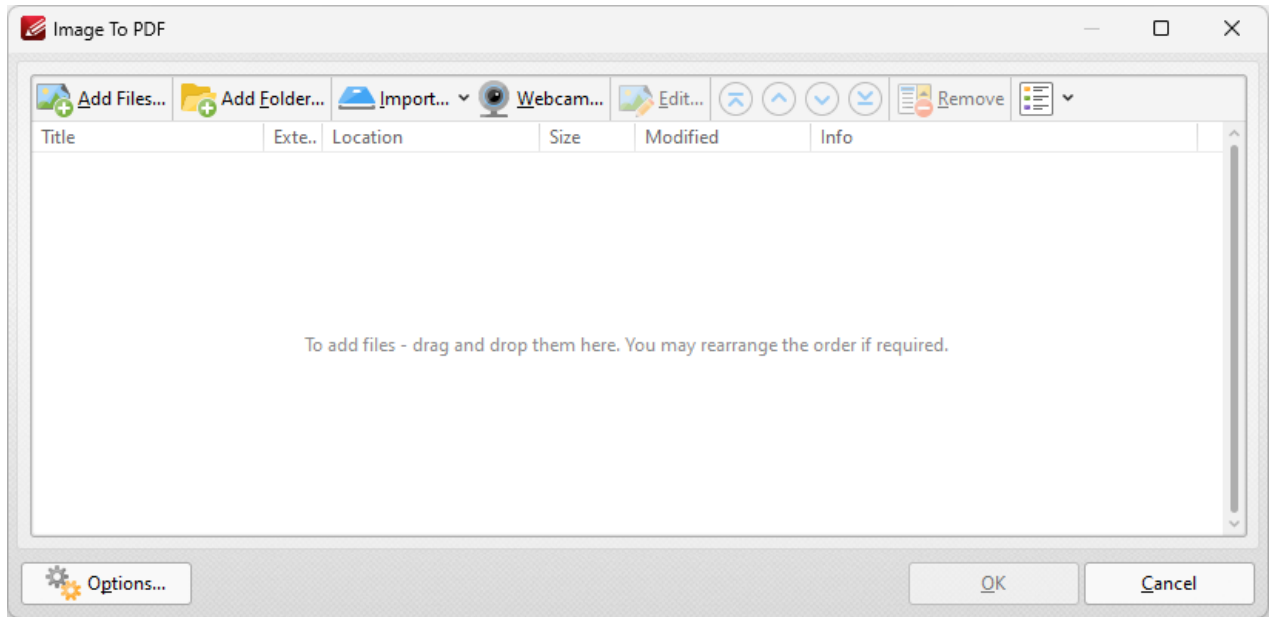
Figure 2. Images to PDF Dialog Box

- The **Add Files** and **Add Folder** options are the same as those outlined above in the **Combine Files into a Single PDF**‧112‧ section.
- Click **Import** to add images from the local scanner. The **Scan Properties** dialog box will open. Select the desired parameters as detailed **here**‧653‧ and click **Scan** to import images.
- Click **Webcam** to add images from the local webcam. The **Image from Webcam** dialog box will open. Click the camera button to take a picture, then apply the crop as desired and click **Next** to add the image to the **Image to PDF** dialog box.
- Select an image from the **Source image files** list and click **Edit** to edit it before it is converted to PDF, as detailed in **(figure 10)** below.
- Click the arrow icons to move images up or down within the list. Click the **Remove** 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 **Options** for further options, as detailed in **(figure 3)** below.
- Click **OK** to create the new document.
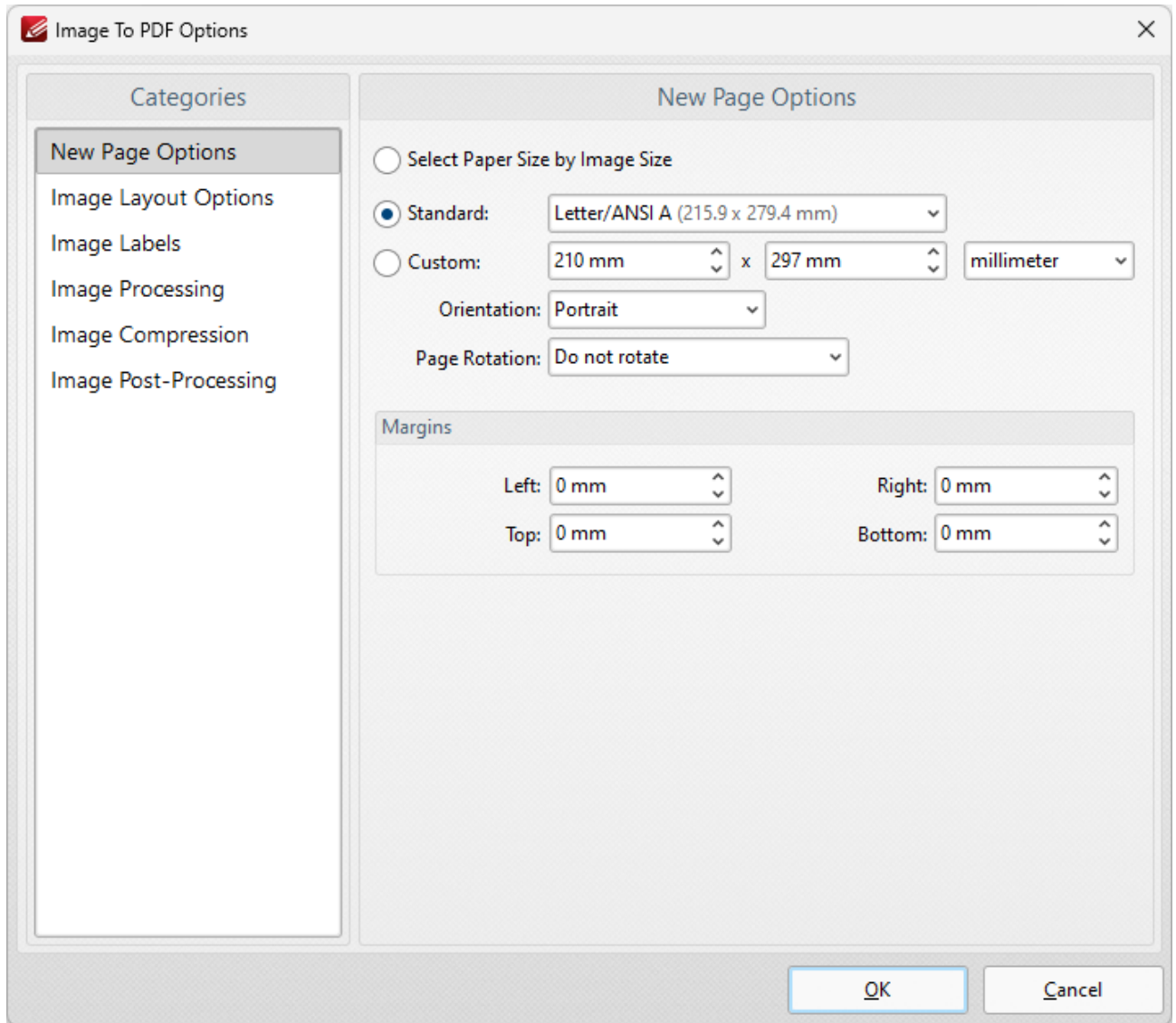
Figure 3. Images to PDF Options Dialog Box

New Page Options

When this option is selected in the **Categories** menu the dialog box in *(figure 3)* will open. 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 options are available:
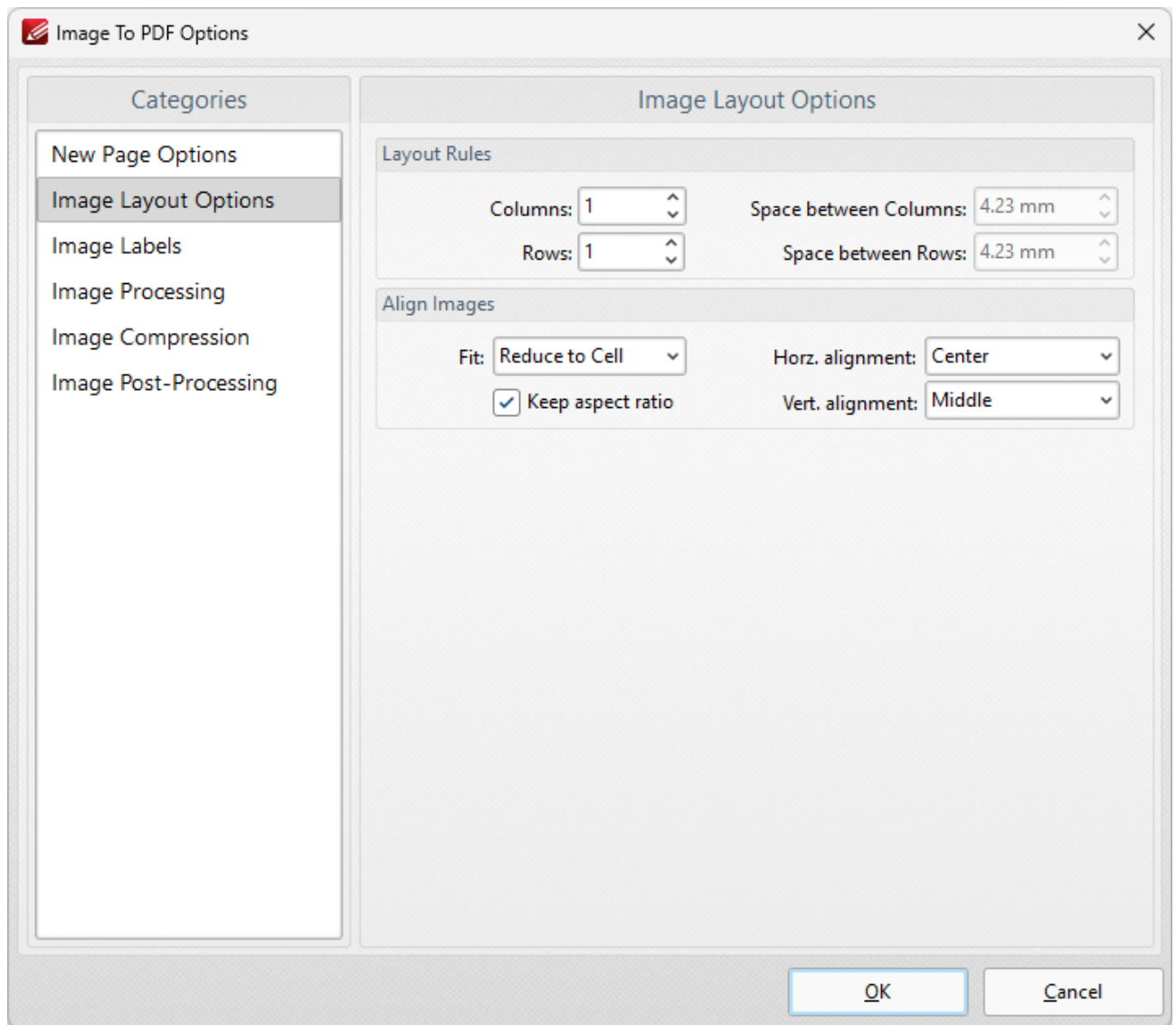
Figure 4. Images Layout Options Dialog Box

- 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.

Image Labels

When this option is selected in the **Categories** menu the following options are available:
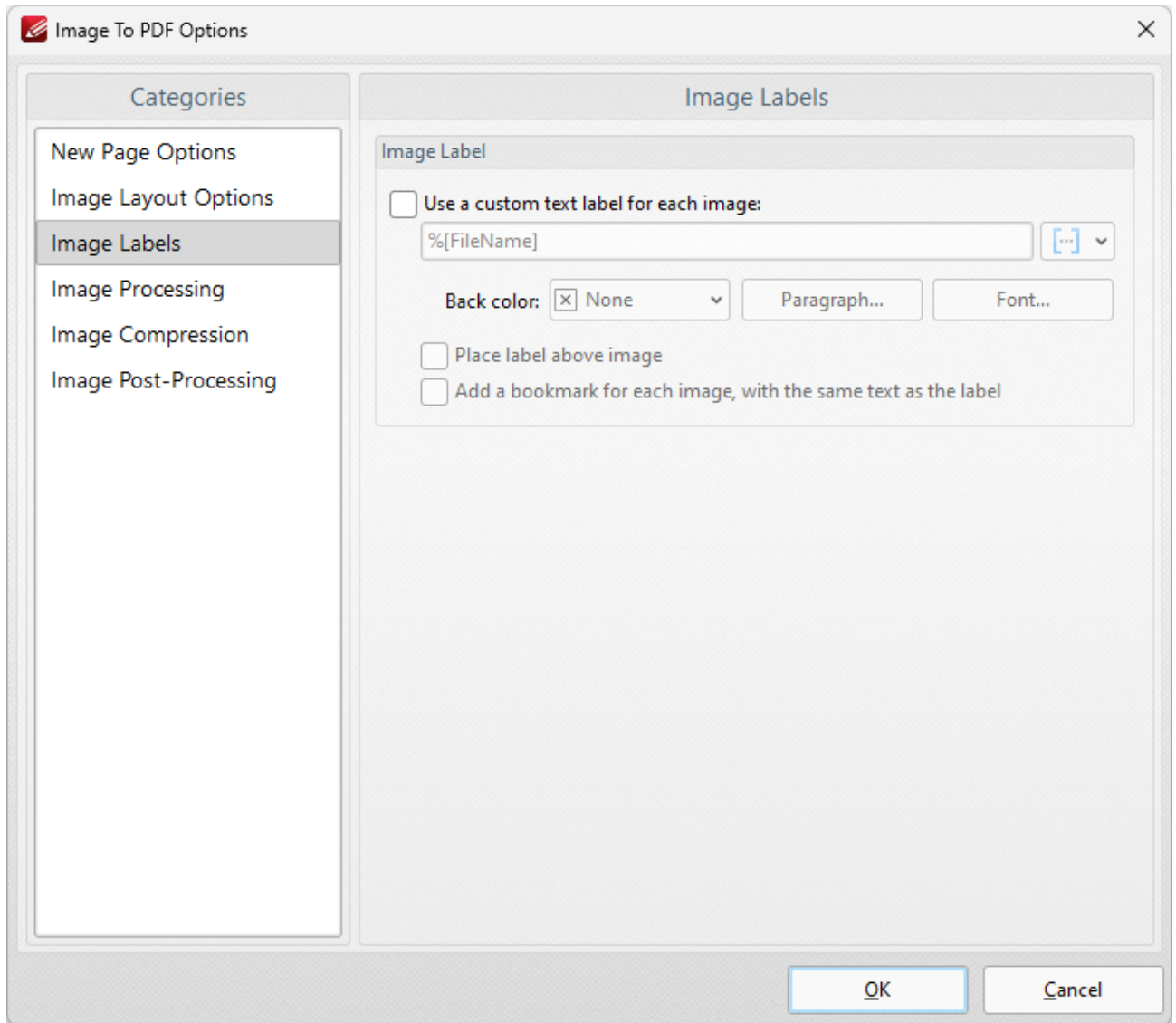
Figure 5. Image Labels Dialog Box

- Select the **Use special text label for each image** box to enable further options.
- Enter the desired label text in the text box. Add **macros** [1157] as desired - either 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 6)** 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).
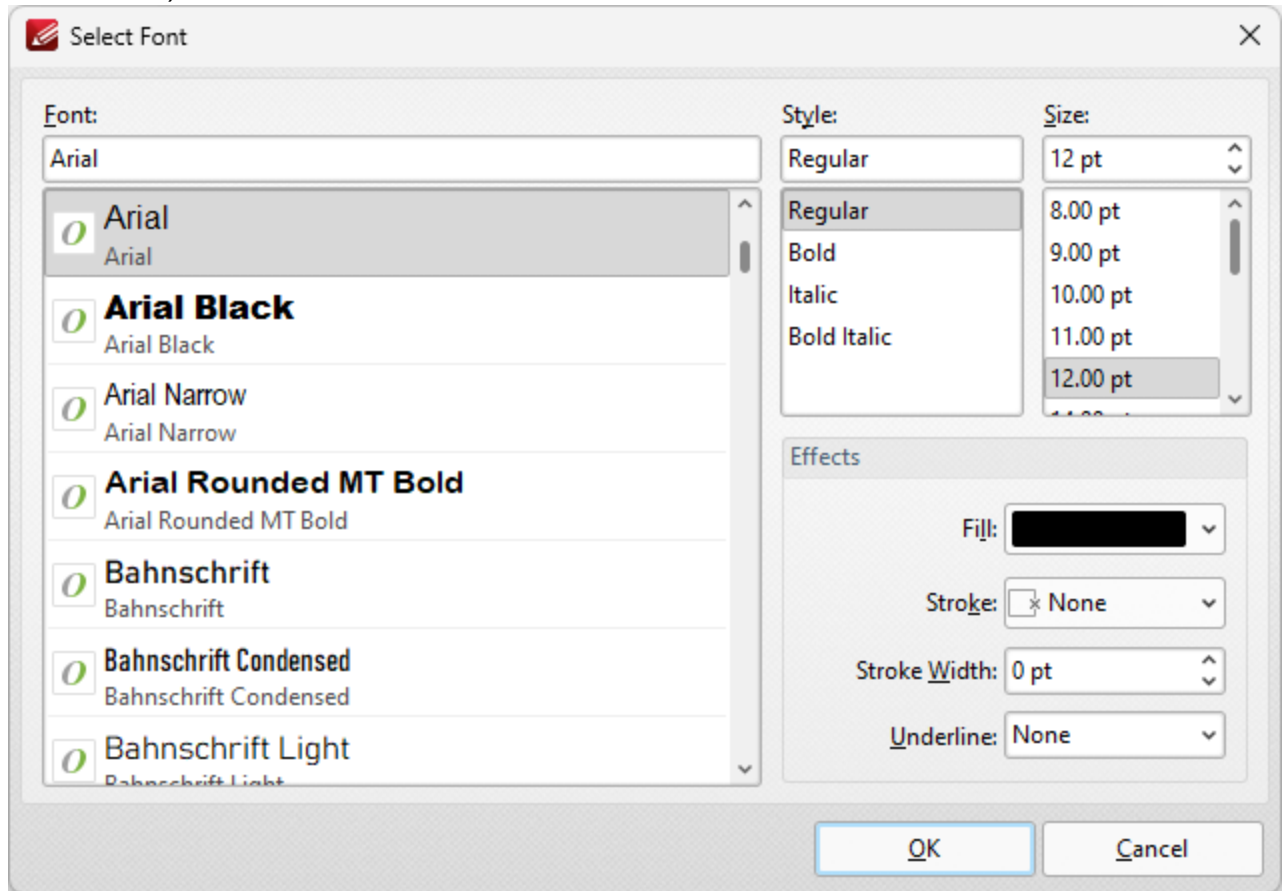
Figure 6. Select Font Dialog Box

- 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 options are available:
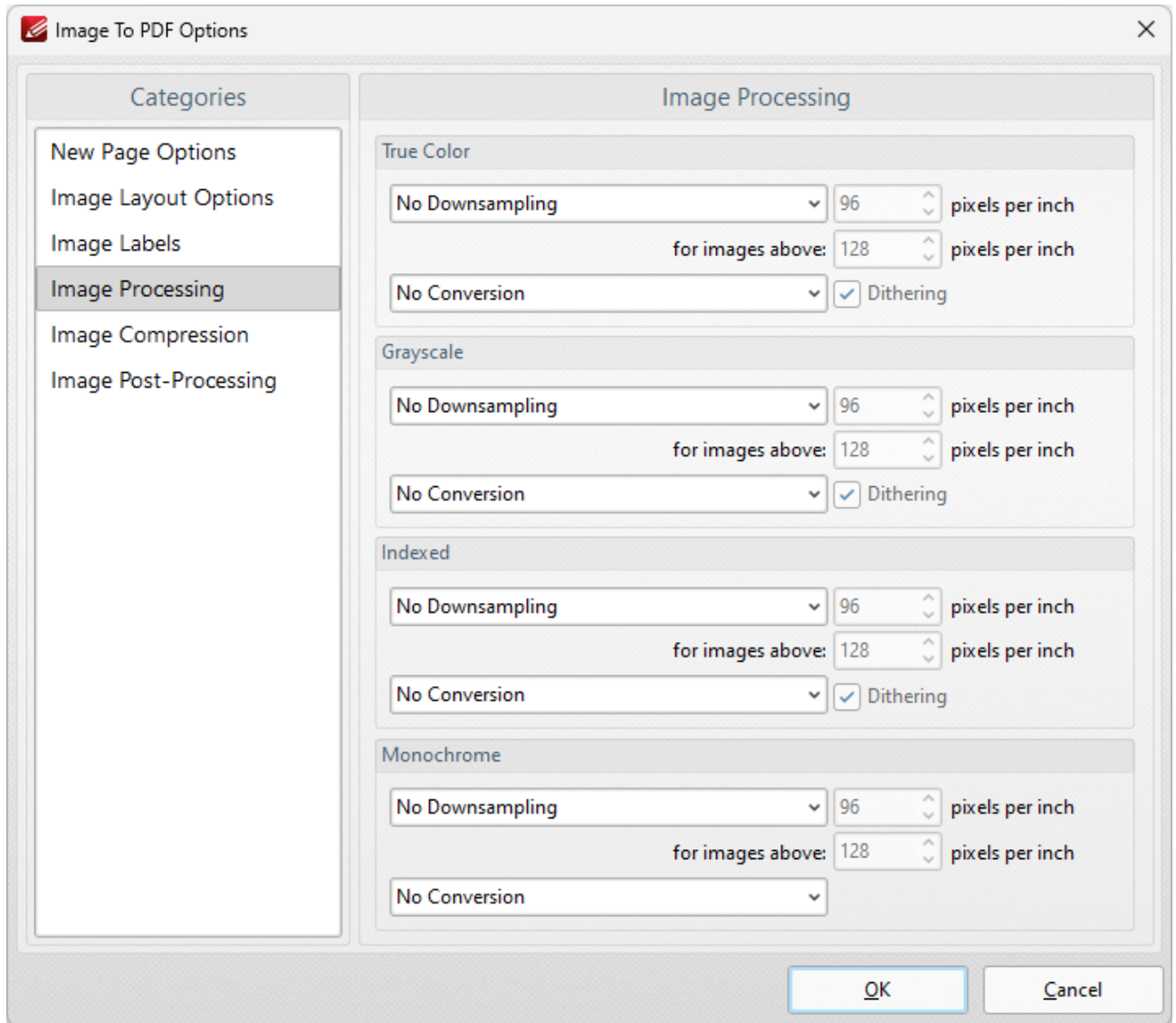
Figure 7. Image Processing Dialog Box

- 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 options are available:
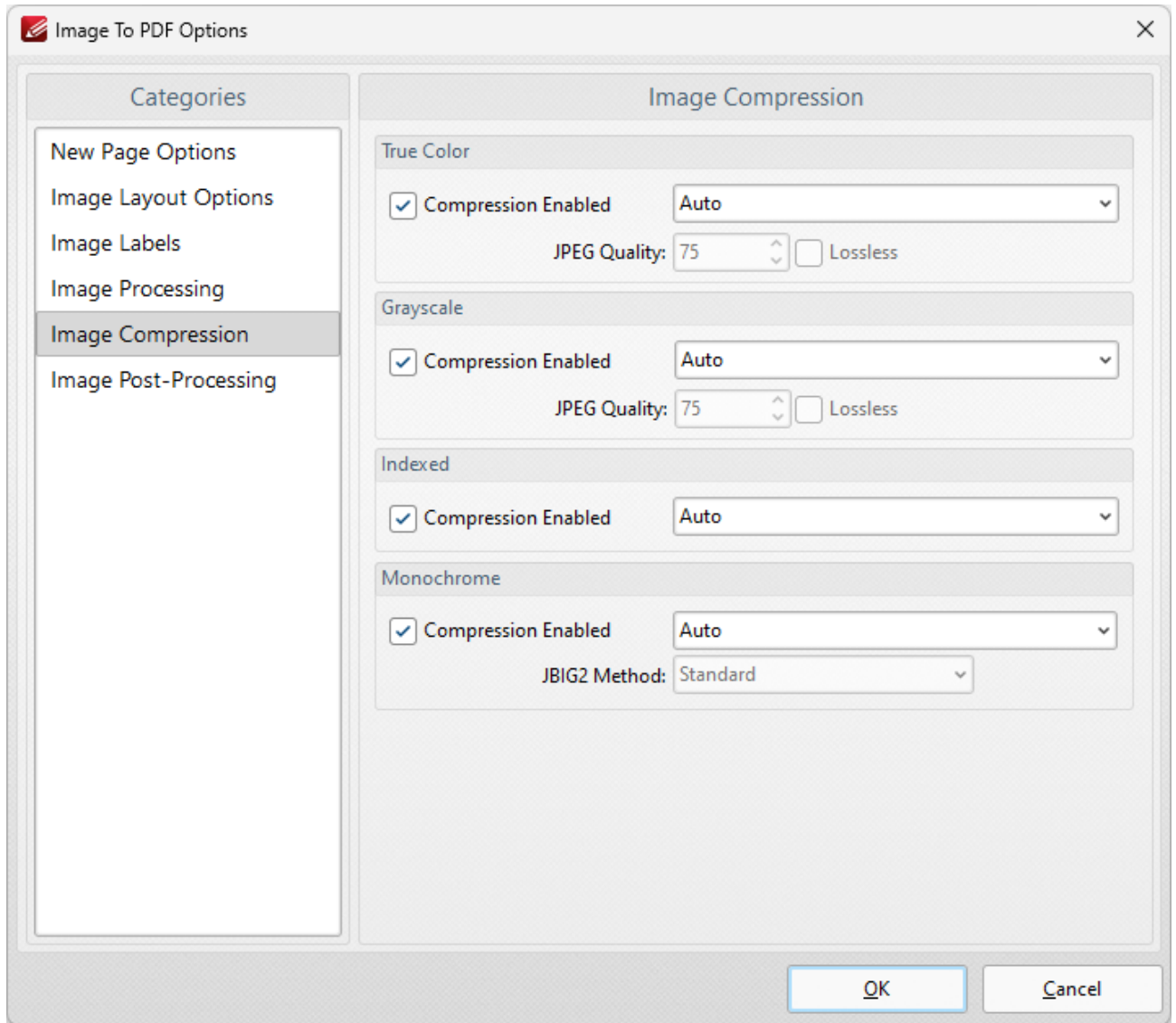
Figure 8. Image Compression Dialog Box

- 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 options are available:
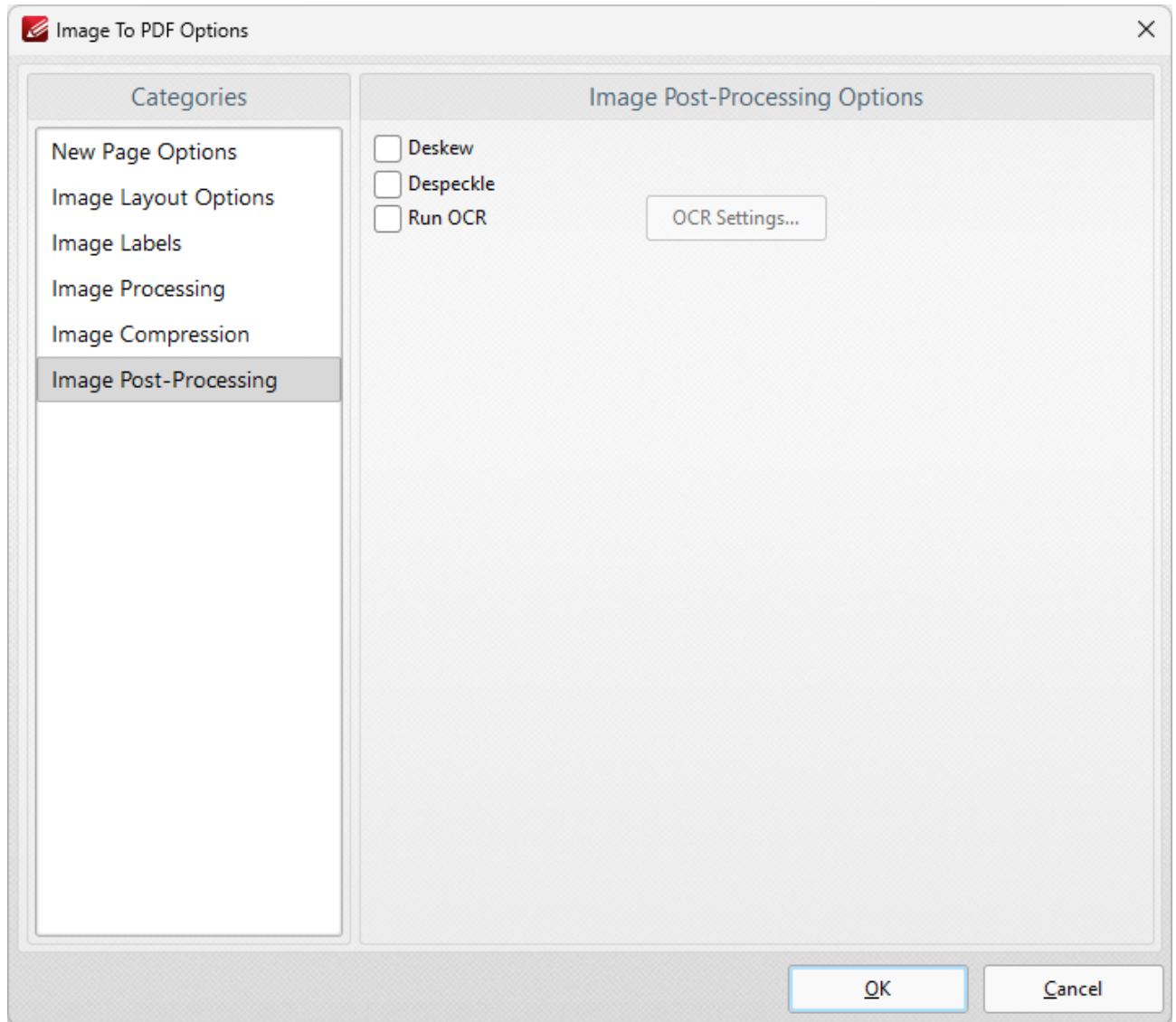
Figure 9. Image Post-Processing Options Dialog Box

- 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.

Editing Images before Converting to PDF

When you have added images to the **Image to PDF** dialog box, you can click **Edit** to edit images before they are converted to PDF:
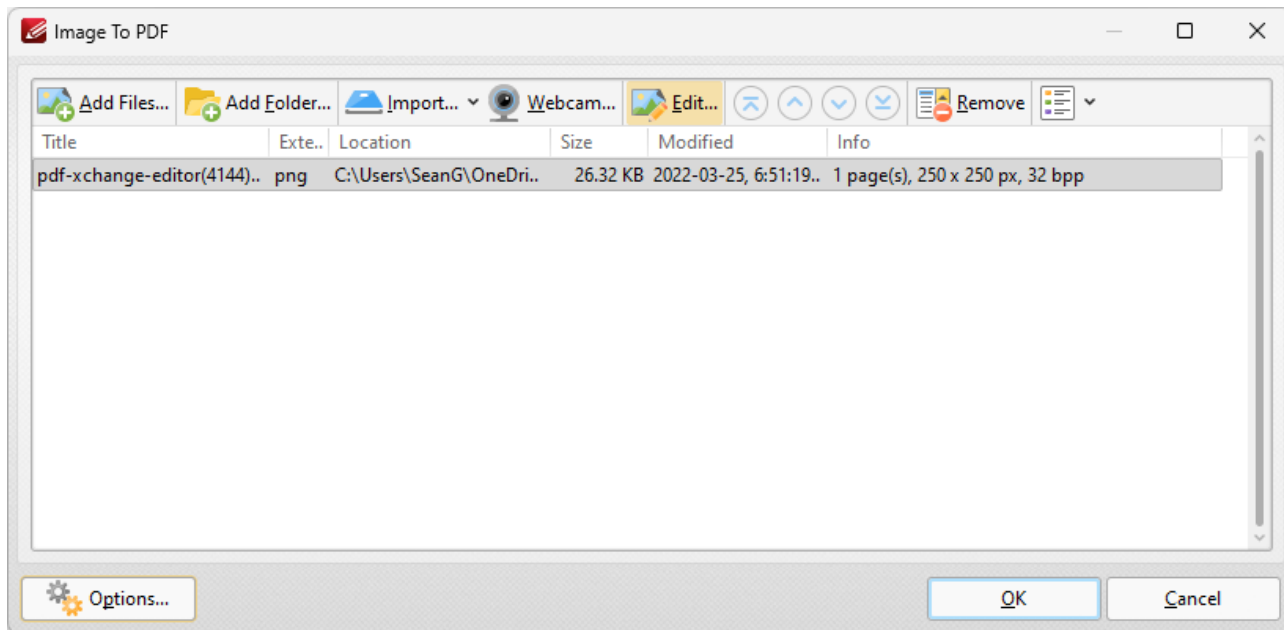
Figure 10. Image to PDF Dialog Box, Edit Option Highlighted

When this option is selected the editing window will open:
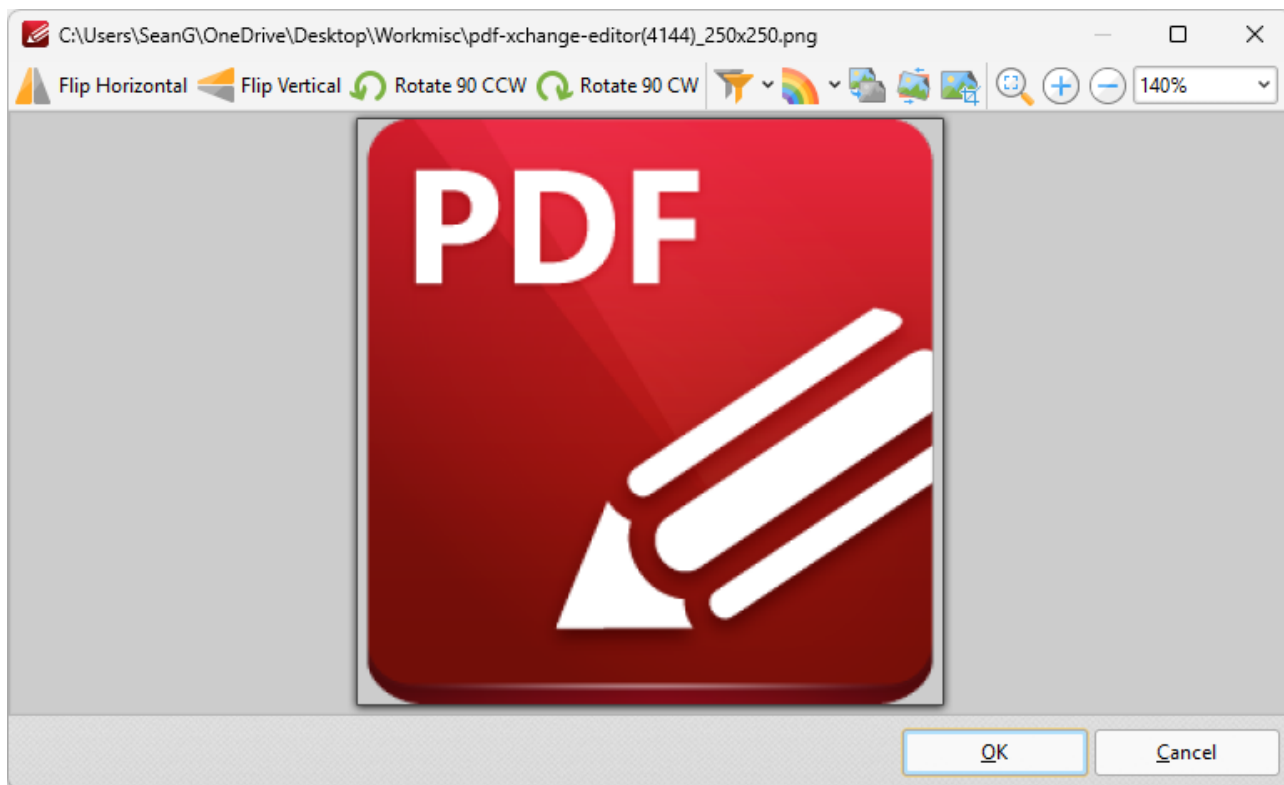
Figure 11. Image Editing Window

- Click **Flip Horizontal/Flip Vertical** to flip images horizontally/vertically before they are converted to PDF.
- Click **Rotate 90 CCW/Rotate 90 CW** to rotate images ninety degrees counterclockwise/clockwise before they are converted to PDF.
- Click **Apply Filter** to apply filters to images before they are converted to PDF, then select the desired filter from the list of options.
- Click **Convert to** to convert images to a different format before they are converted to PDF, then select the desired format from the list of options.
- Click **Grayscale** to convert images to grayscale before they are converted to PDF.
- Click **Deskew** to deskew images before they are converted to PDF. Deskewing is used to straighten images that have been scanned crookedly.
- Click **Crop** to crop images before they are converted to PDF. A bounding box will appear around images when this option is used. Click and drag the bounding bow to determine the cropping parameters as desired.
- Click **Fit Visible** to fit images to the image editing window.
- Use the **Zoom in/Zoom Out** options, or the zoom number box, to change the zoom level of images.

Click **OK** to convert images to PDF.

5.1.4.11 From Scanner

From Scanner

Click **From Scanner** to create new PDF documents from the local scanner:
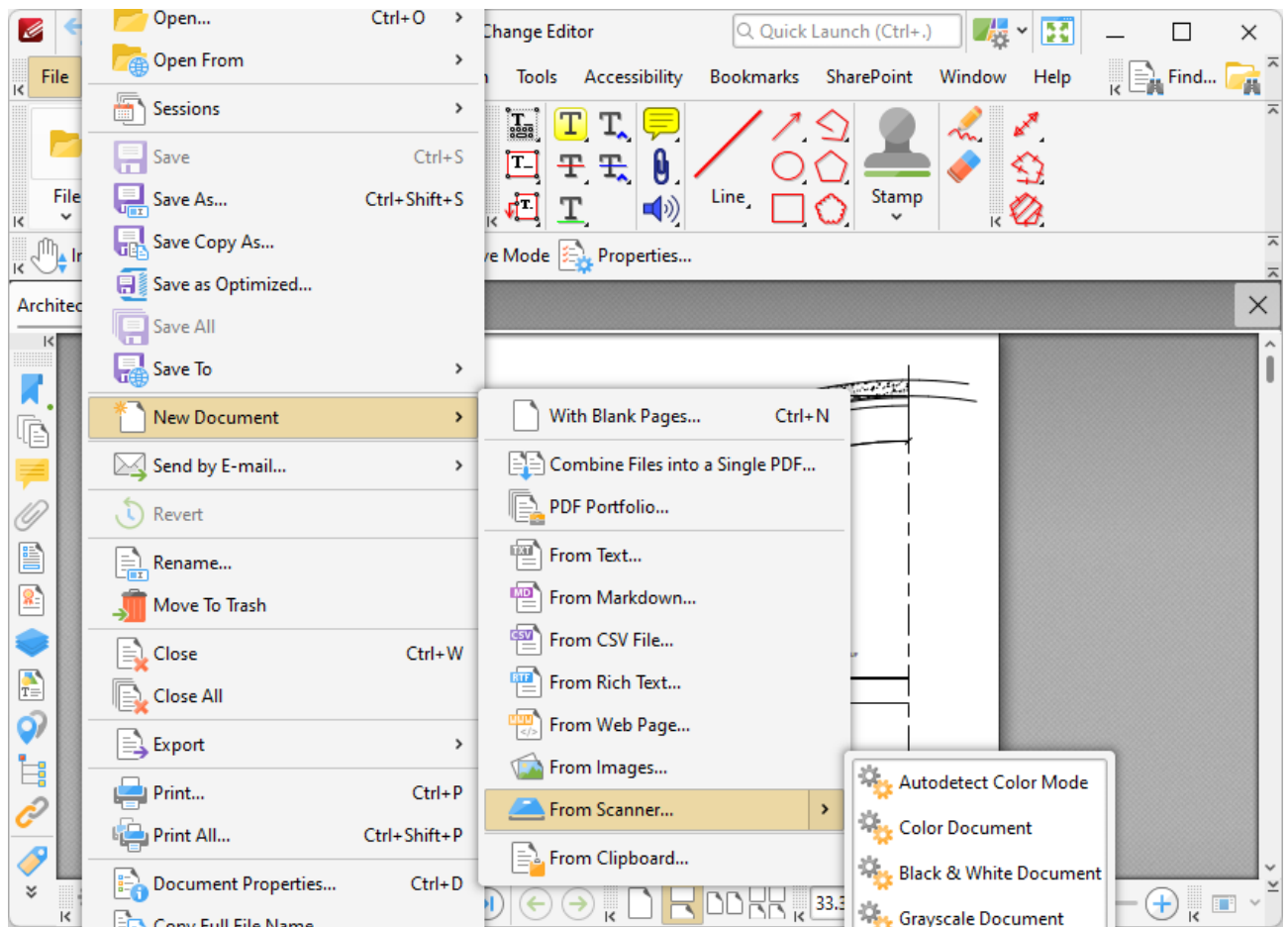
Figure 1. New Document Submenu, From Scanner Options

- Preset options are displayed in the upper section. Click these options to create a new document according to preset parameters.
- Click **Configure Presets** to determine preset parameters for each mode. See **here** 290 for further information.

- Click **Custom Scan** to determine custom parameters. The **Scan Properties** dialog box will open:
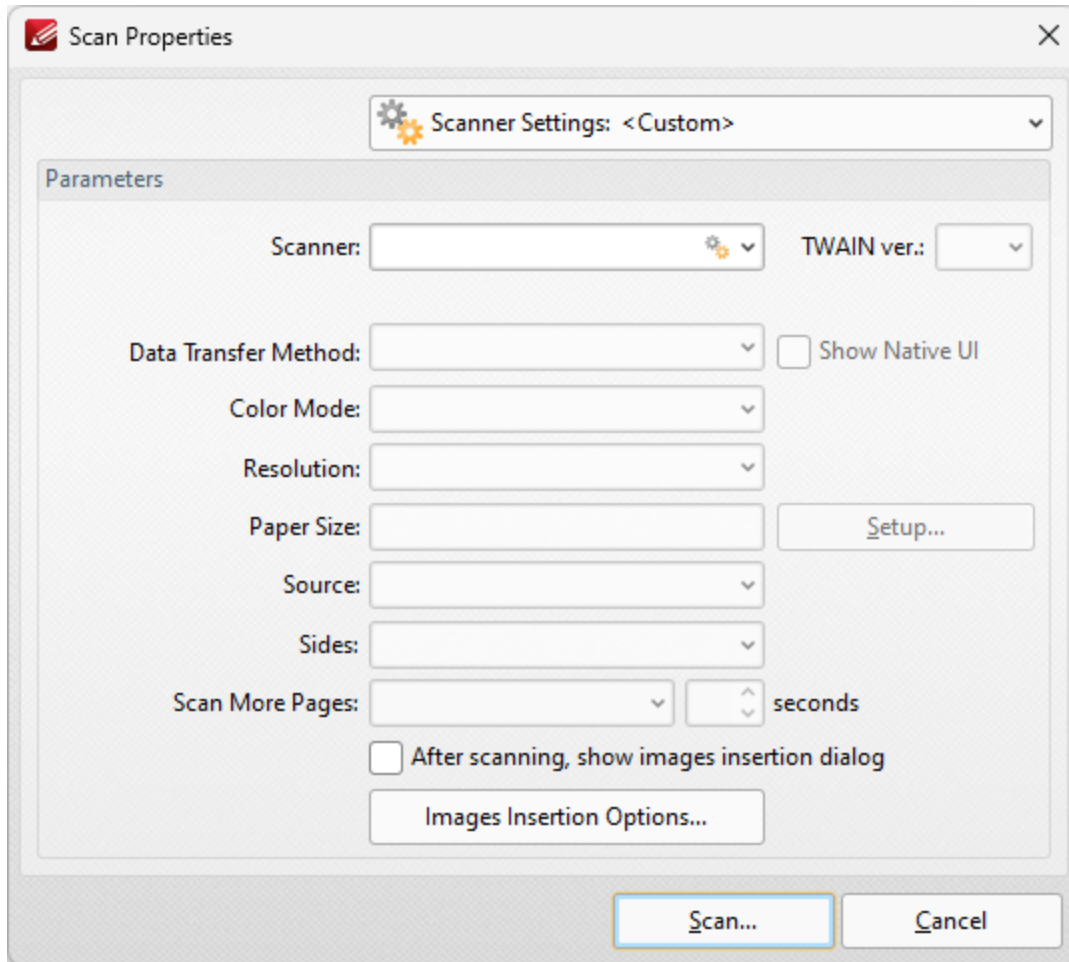
Figure 2. Scan Properties Dialog Box

- 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:**
  - **Native Mode** uses a single memory buffer. This is the default and fastest mode, and is compatible with the broadest range of scanners.
  - **Memory Mode** enables the use of multiple memory buffers. This is a useful function in cases where memory is low and/or when large images are being scanned.
- The **Show Native UI** box is selected by default, which means the user interface of the device driver is used. This is the most reliable option, and the scanner will select certain parameters of the scan itself: **Color Mode, Resolution, Paper Size and Source.** Clear the **Show Native UI** box to customize these options:
  - **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.
- **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.
- Select the **After scanning, show images insertion dialog** box to view the images insertion dialog box after the scan has taken place. This enables the customization of images and images settings.
- Click the **Images Insertion Options** button to determine further options for inserted images. Those options are explained **here.** [141]

Click **Scan** to scan pages.

Scanner Settings

Click the **Scanner Settings** menu to save custom settings for subsequent use. The following dialog box will open:
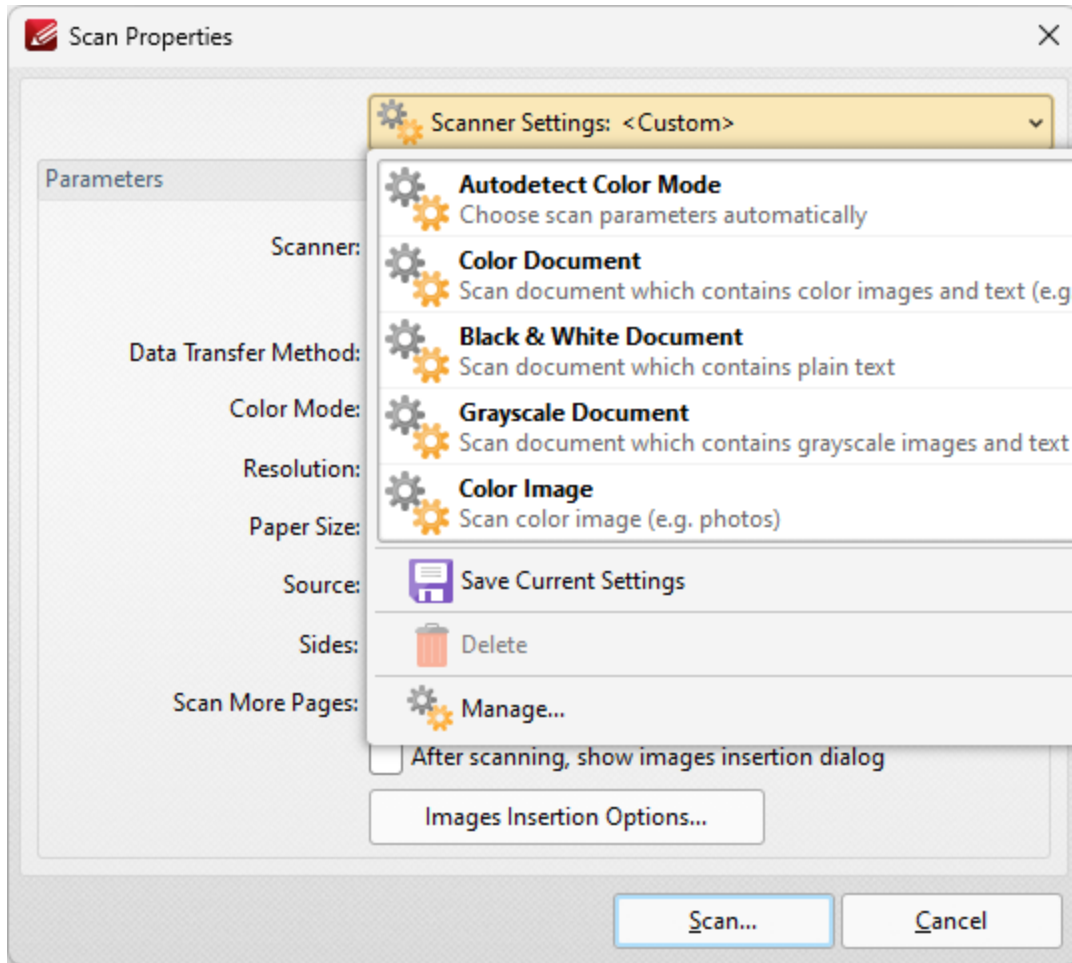
Figure 3. Scanner Settings Options

These options are 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 for the customized settings. Click **Manage** to edit customized settings and **Delete** to remove them.

5.1.4.12   From Clipboard

From Clipboard

Click **From Clipboard** to create a PDF document from the content of your clipboard:
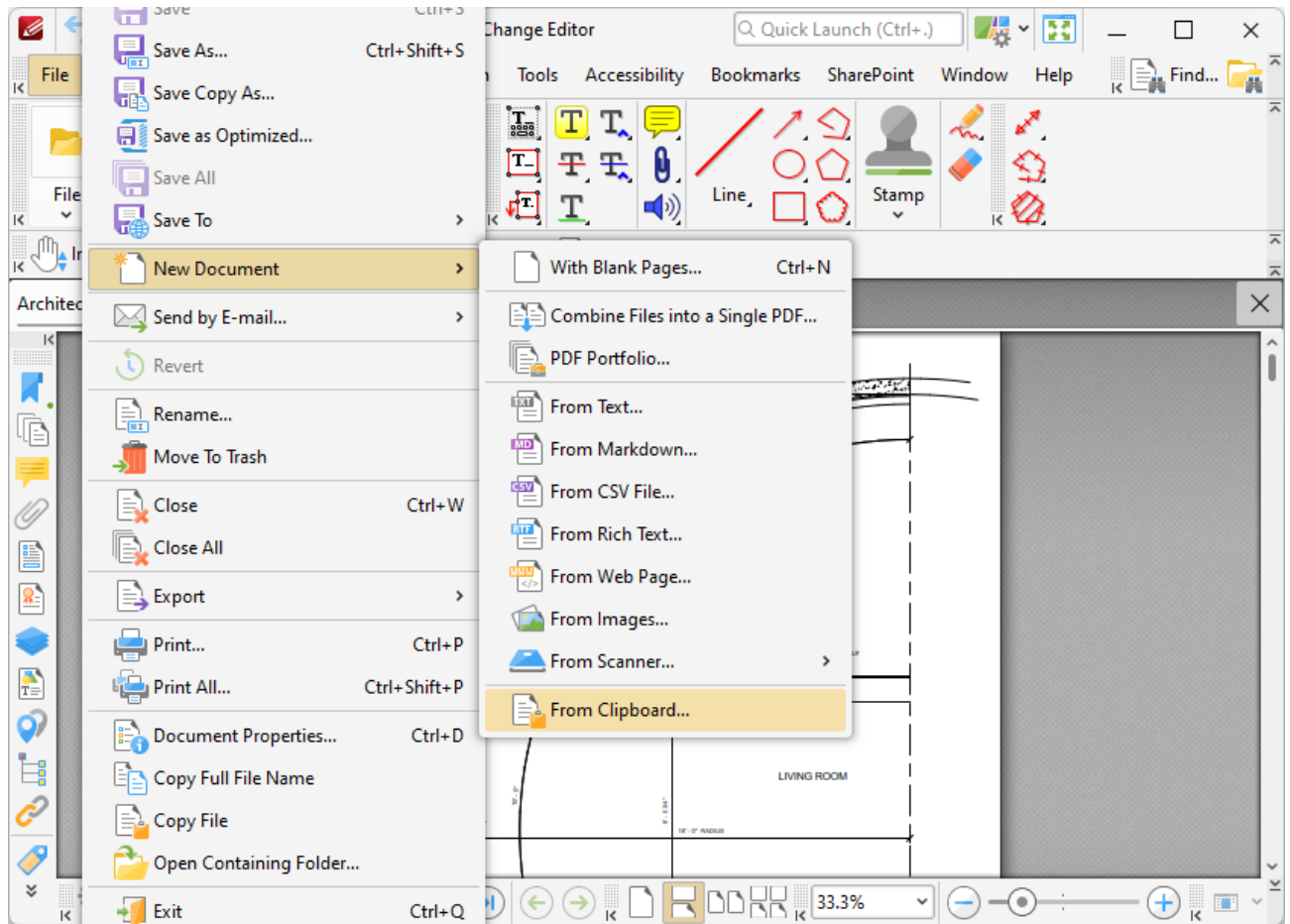
Figure 1. New Document Submenu, From Clipboard Option

The **Create New Document from Clipboard** dialog box will open:
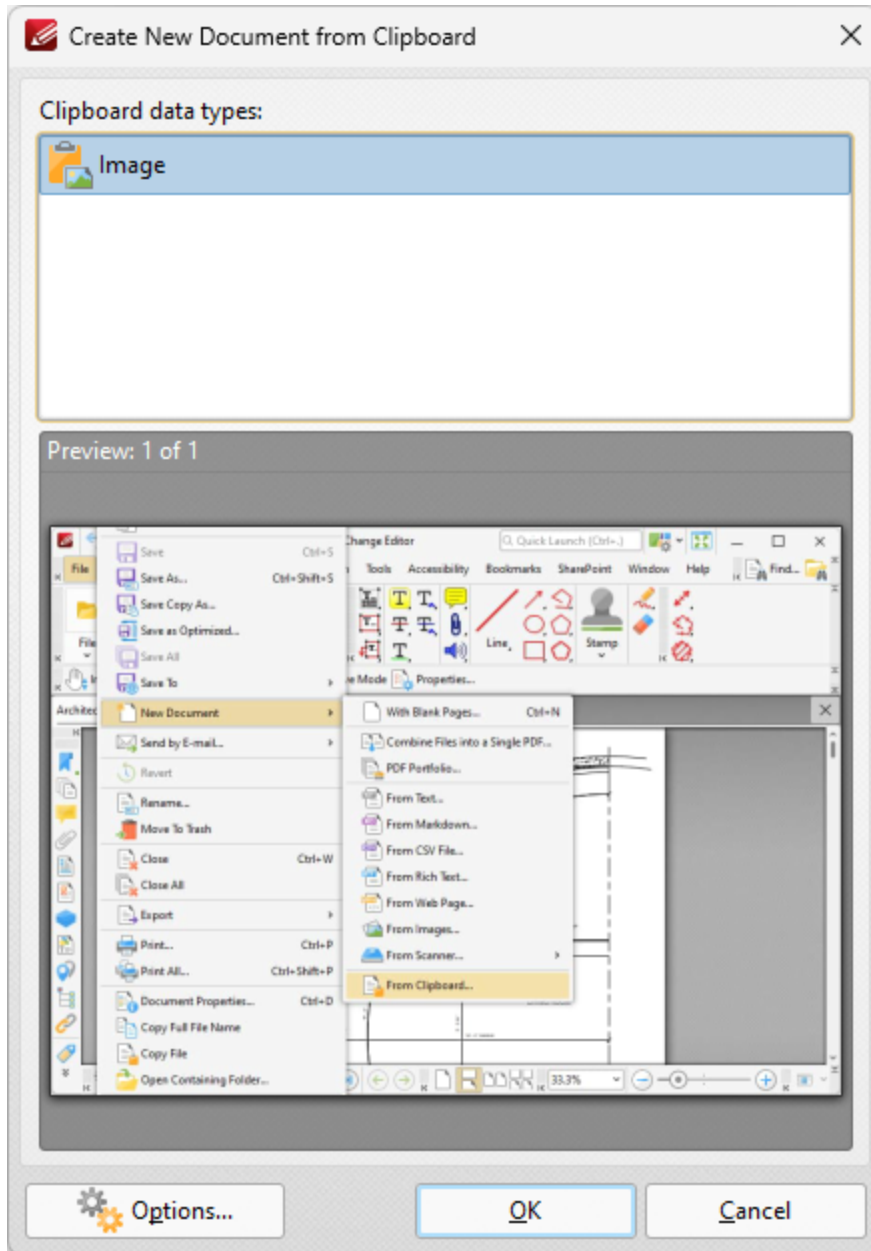
Figure 2. Create New Document from Clipboard Dialog Box

Select the content that you want to use to create the new document, then click **OK** to create the
document.

If you are creating a new document from an image, then you can click the **Options** button to determine
conversion options. The **Image to PDF Options** dialog box will open, and can be used to determine
conversion options as detailed **here.** 141

If you are creating a new document from text, then you can click the **Options** button to determine
conversion options. The **Options** dialog box will open, and can be used to determine conversion
options as detailed **here.** 121

5.1.5   **Send by E-mail**

Send by E-mail

Hover over **Send by E-Mail** to open the following submenu:
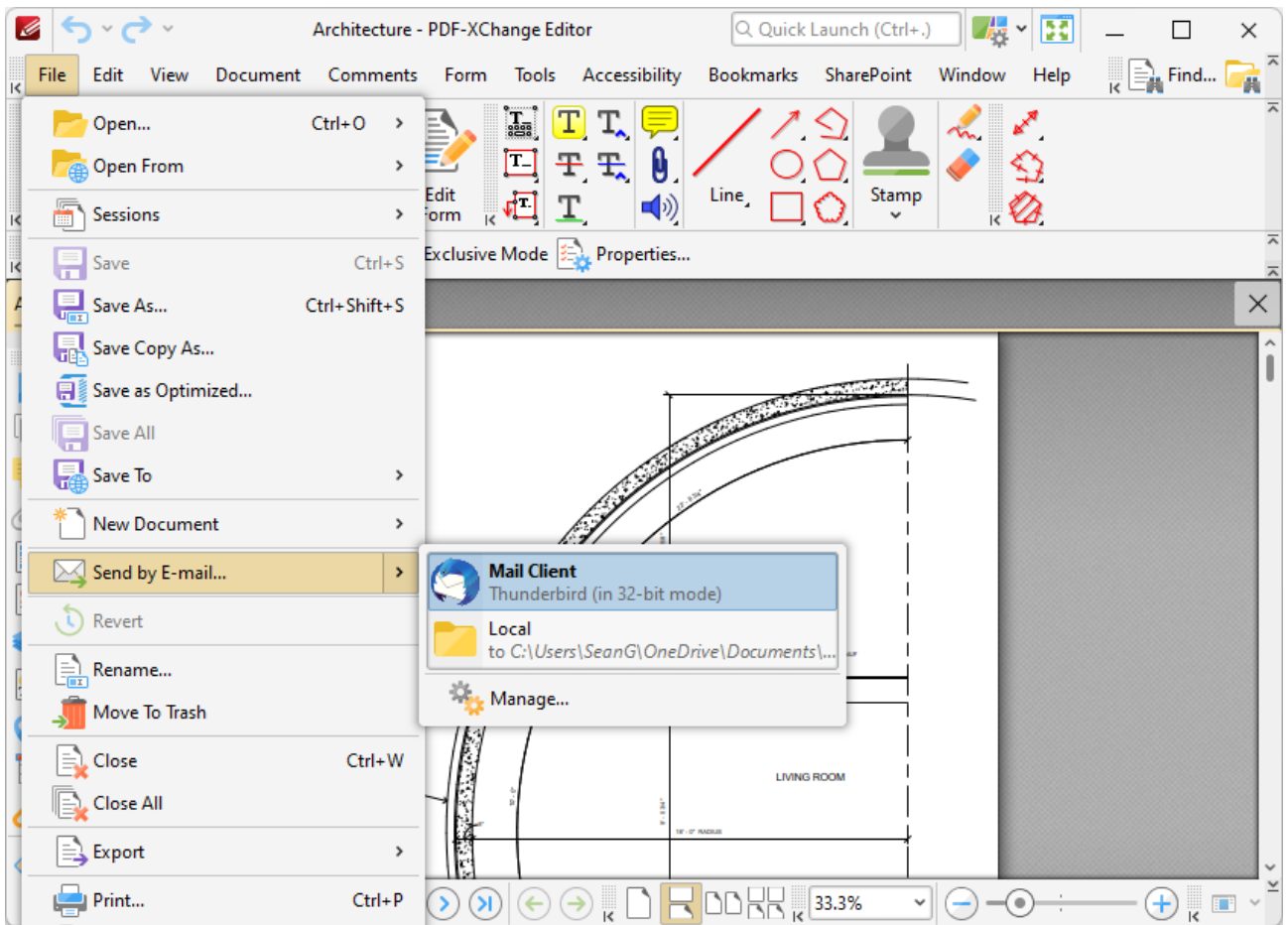
Figure 1. File Tab Submenu, Send by E-Mail Options

- Click **Mail Client** to launch the email client of the current user and email documents directly from **PDF-XChange Editor.**
- Click **Local** to save email information in cases where **MAPI** is not supported.
- Click **Manage** to manage the **Send by E-mail** settings, which are explained **here.** 297

5.1.6 **Revert**

 Revert

Click **Revert** to undo unsaved changes to the current document:
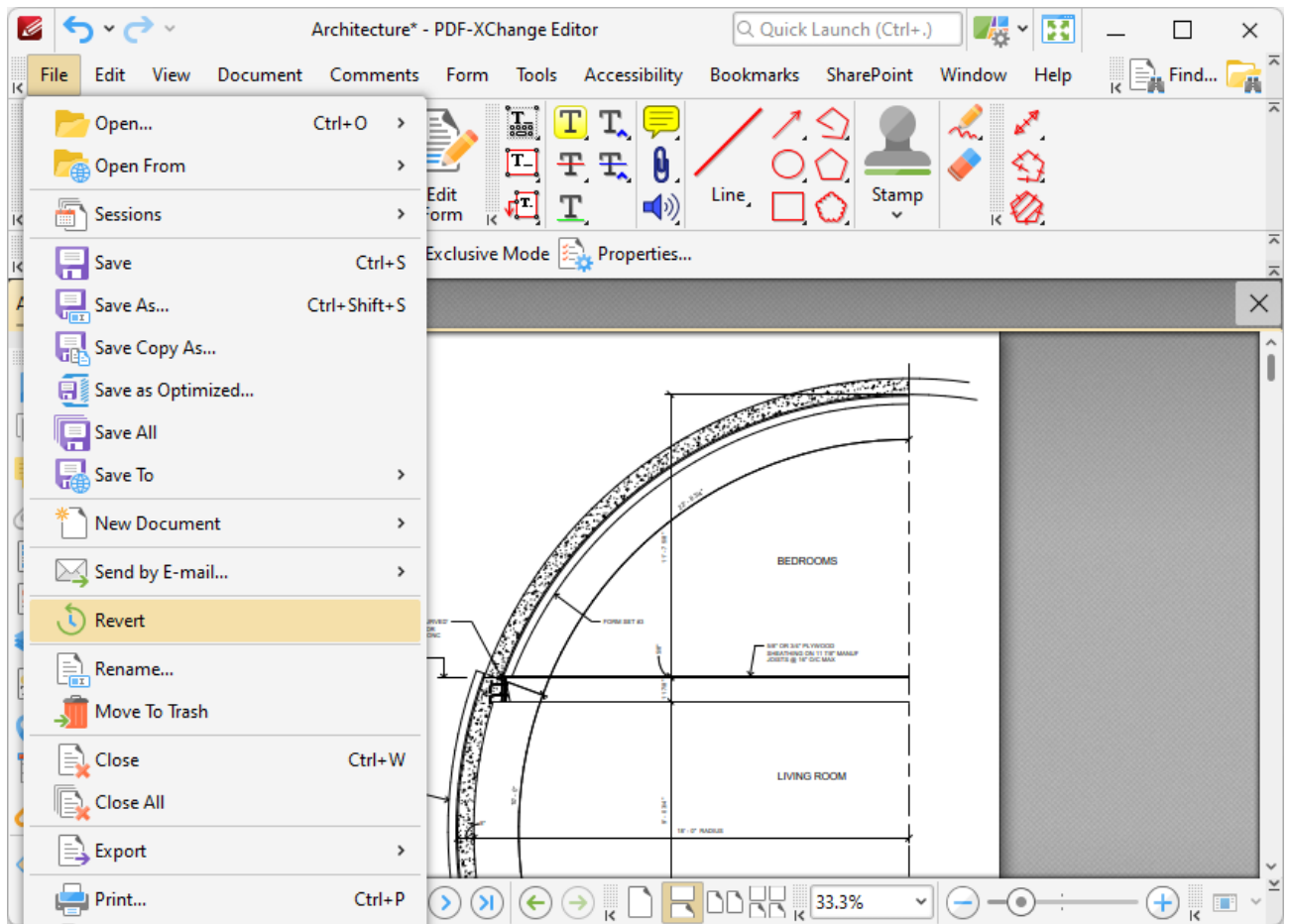
Figure 1. File Tab Submenu, Revert

PDF-XChange Editor will then revert all changes in the current document.

5.1.7 **Rename**

Rename

Click **Rename** to rename the current document:
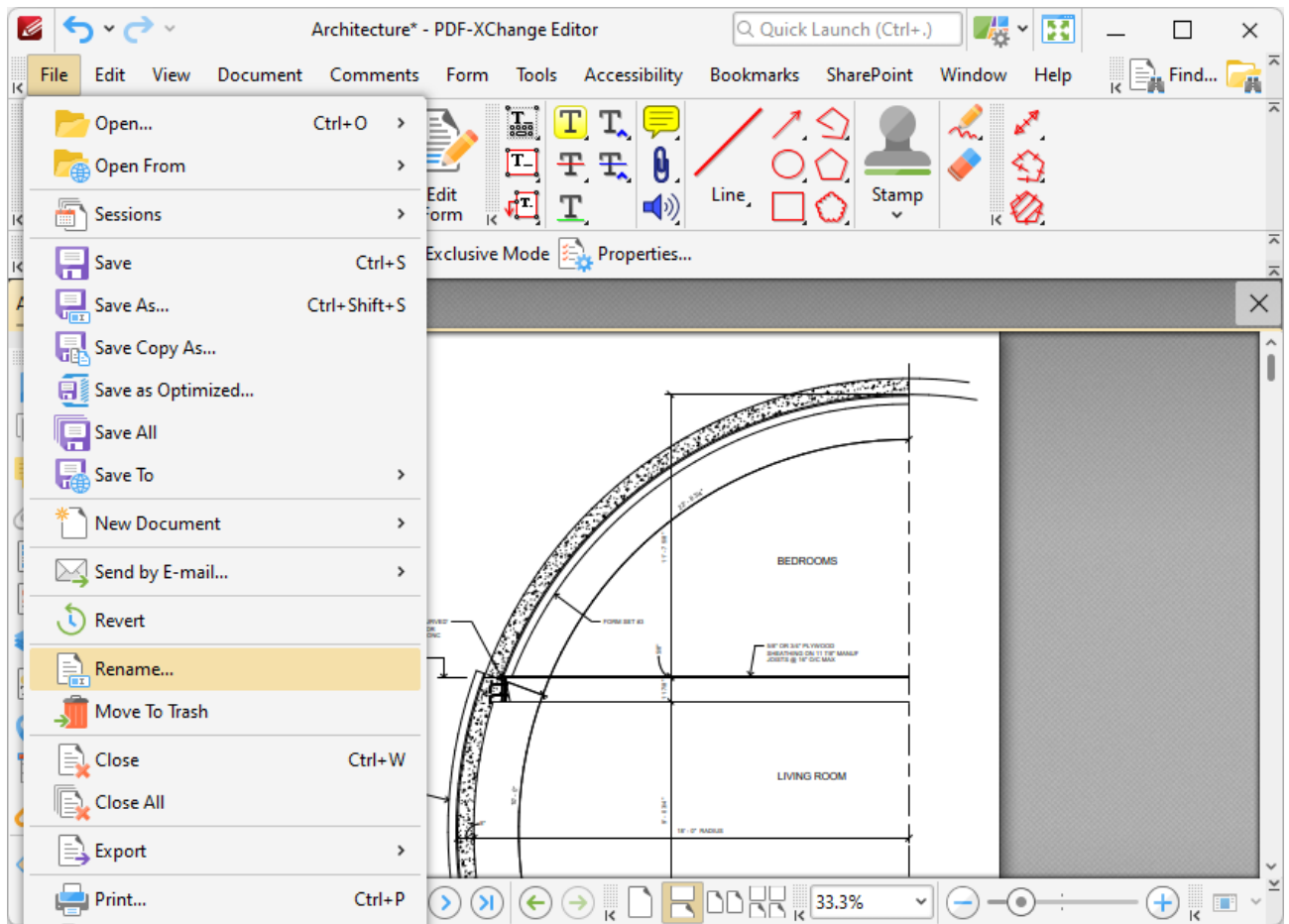
Figure 1. File Tab Submenu, Rename

The **Rename Document** dialog box will open. Enter the new name for the document and click **OK** to save.

5.1.8 **Move to Trash**

Move to Trash

Click **Move to Trash** to move the current document to the **Windows** recycle bin:
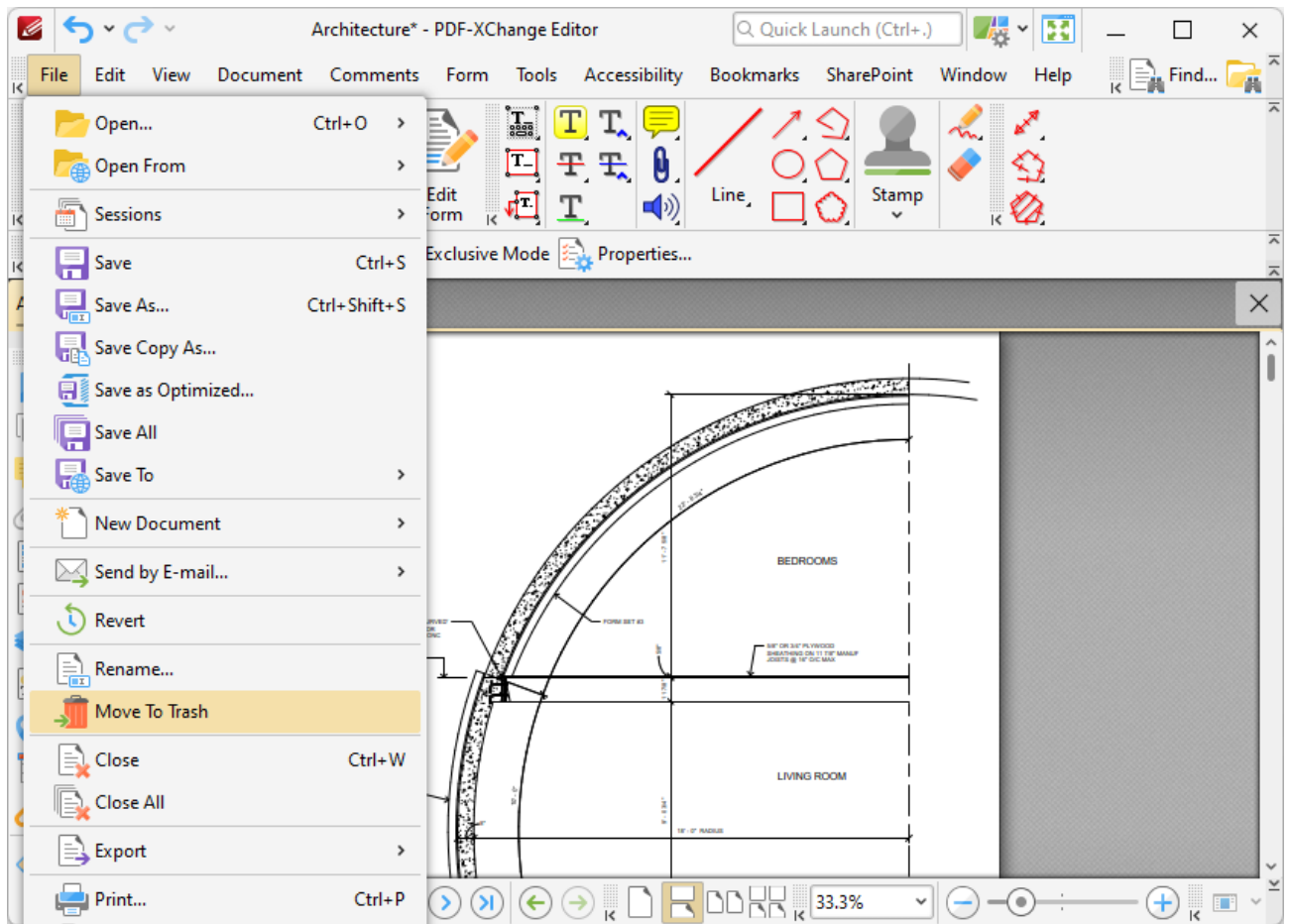
Figure 1. File Tab Submenu, Move to Trash

The current document will then be deleted.

5.1.9 Close

Close

Click **Close** (or press Ctrl+W) to close documents:
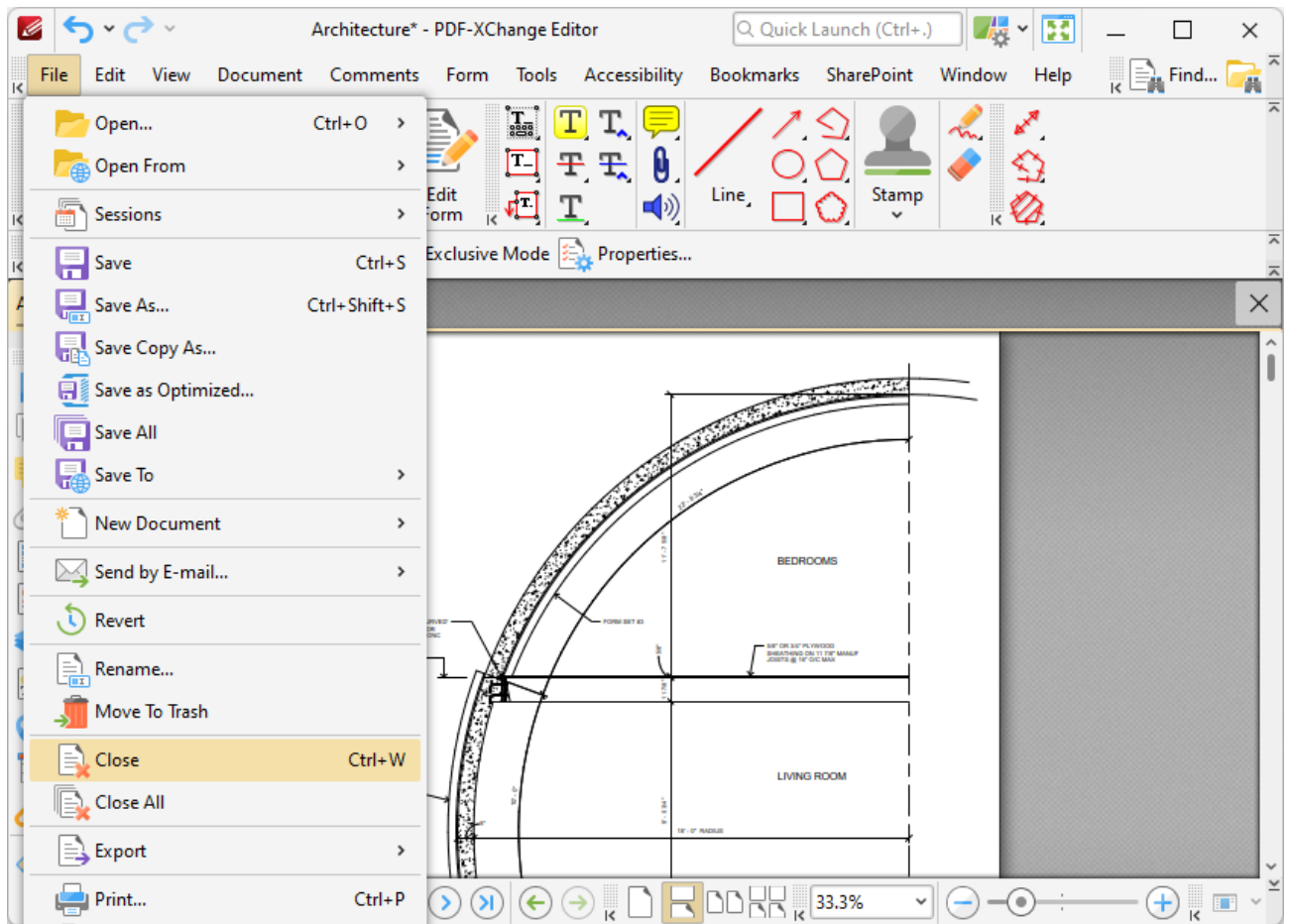
Figure 1. File Tab Submenu, Close

5.1.10   Close All

Close All

Click **Close All** to close all open documents:
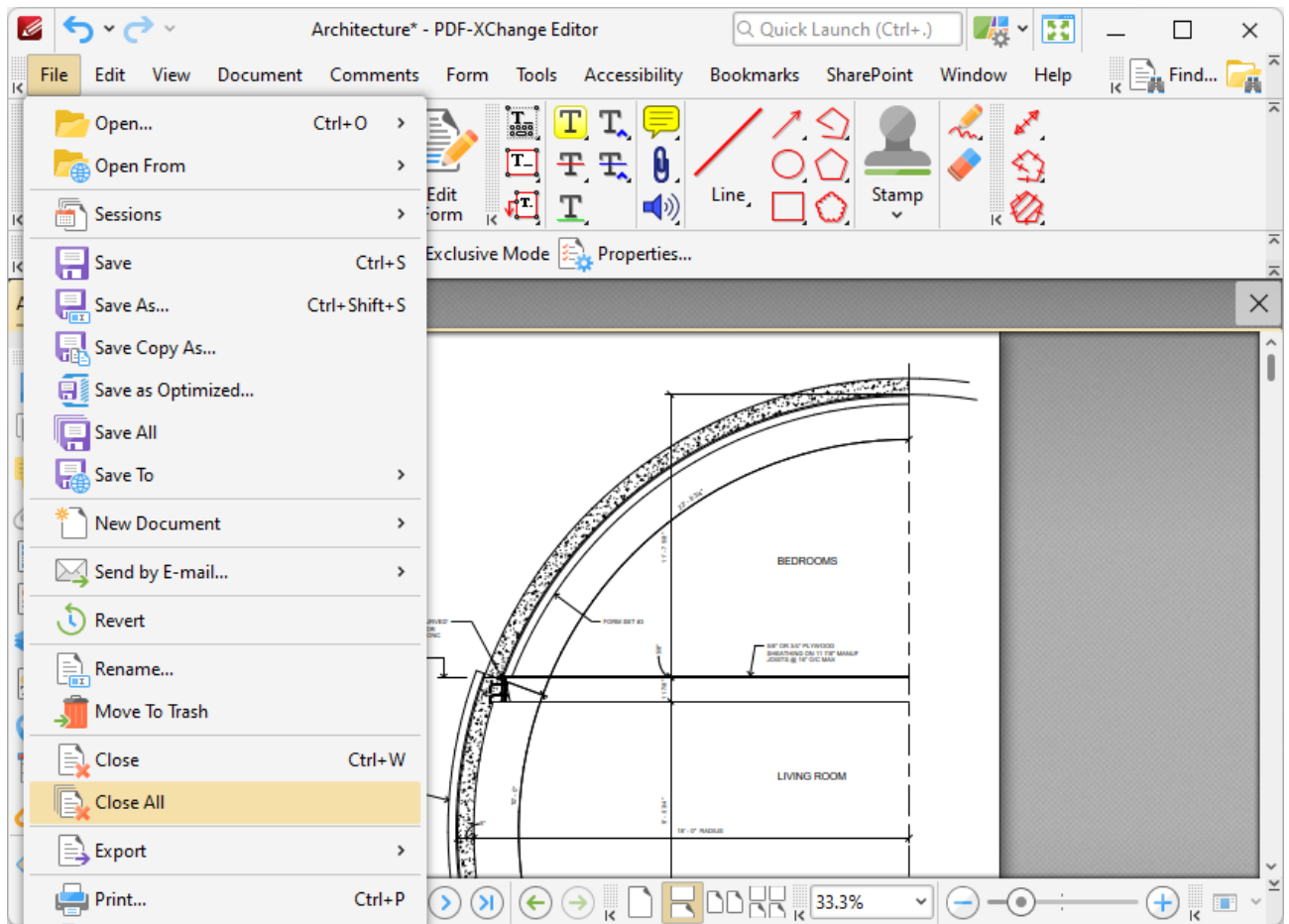
Figure 1. File Tab Submenu, Close All

5.1.11 Export

Export

Hover over **Export** to open the following submenu:
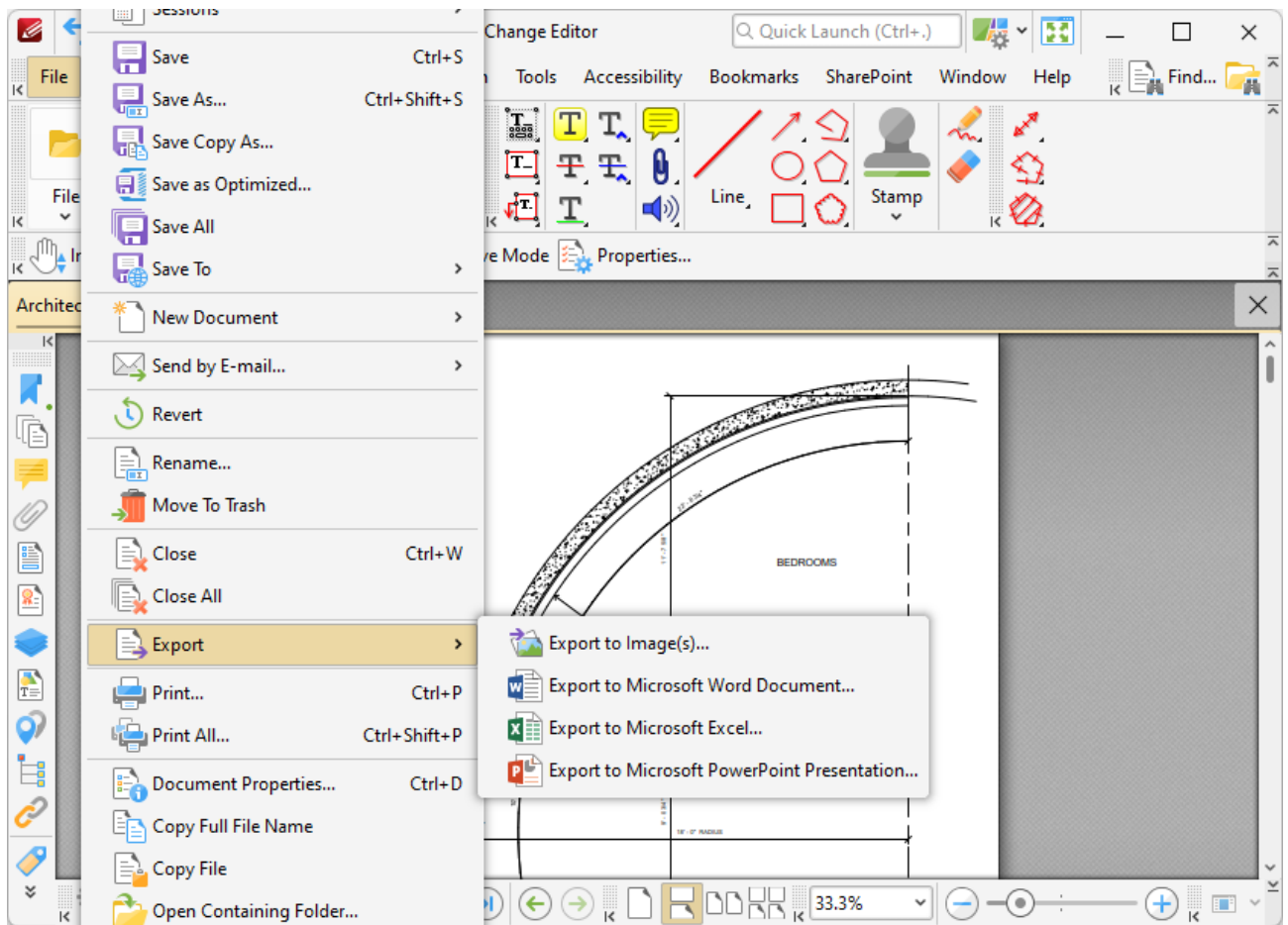
Figure 1. File Tab Submenu, Export Options

These options are used to convert documents/document pages into different formats:

- Click **Export to Image(s)** to export PDF documents into image format, as detailed **here.** [168]
- Click **Export to Microsoft Word Document** to export documents to **(*.docx)** format, as detailed **here.** [170]

- Click **Export to Microsoft Excel** to export documents to **(*.xlsx)** format, as detailed <u>here.</u> 173
- Click **Export to Microsoft Powerpoint Presentation** to export documents to **(*.pptx)** format, as detailed <u>here.</u> 176

Please note that **MS Office** must be installed on the local computer for the **Export to MS Office** features to operate, and **Save As XPS** functionality must be available in the version of **MS Office** being used. This functionality was added in **MS Office 2007.**

5.1.11.1 **Export to Image**

Export to Image

Click **Export to Image(s)** to export PDF documents into image format. The **Export to Image(s)** dialog box will open:
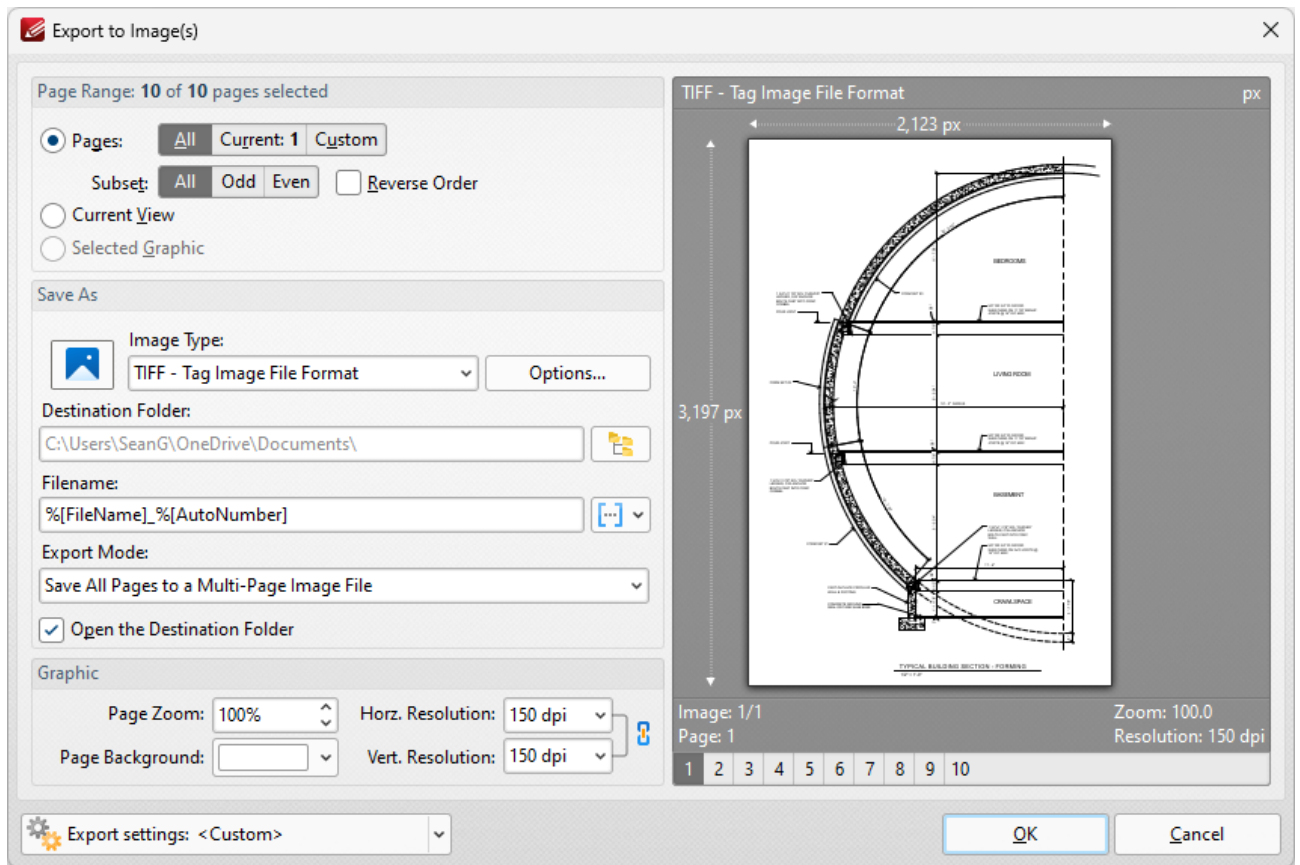
Figure 2. Export to Images Dialog Box

- Use the **Page 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. See **here** 1274 for further information.
- 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 **Filename** text box to enter a file name for the new document. Add **macros** 1157 as desired - enter 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** 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.

5.1.11.2 Export to MS Word Document

Export to MS Word Document

Click **Export to Microsoft Word Document** to export documents to **(*.docx)** format, which is intended for use with **Microsoft Word.** The **MS Word File** dialog box will open:
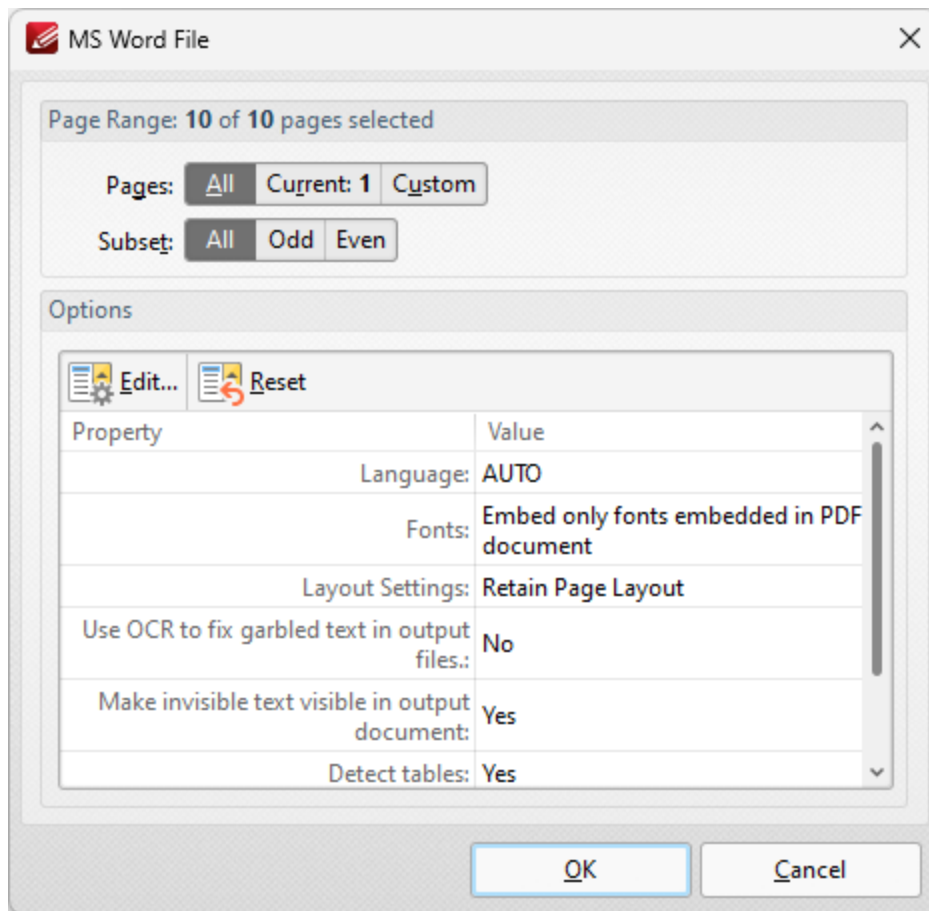
Figure 1. MS Word File Dialog Box

- Use the **Pages** option to determine the pages to be exported to **(*.docx)** format.
- Use the **Subset** option to specify a subset of the page range as desired.
- Note that the current export settings are detailed in the dialog box. Click **Edit/Reset** to edit/reset these settings. When you click **Edit** the **Options** dialog box will open:
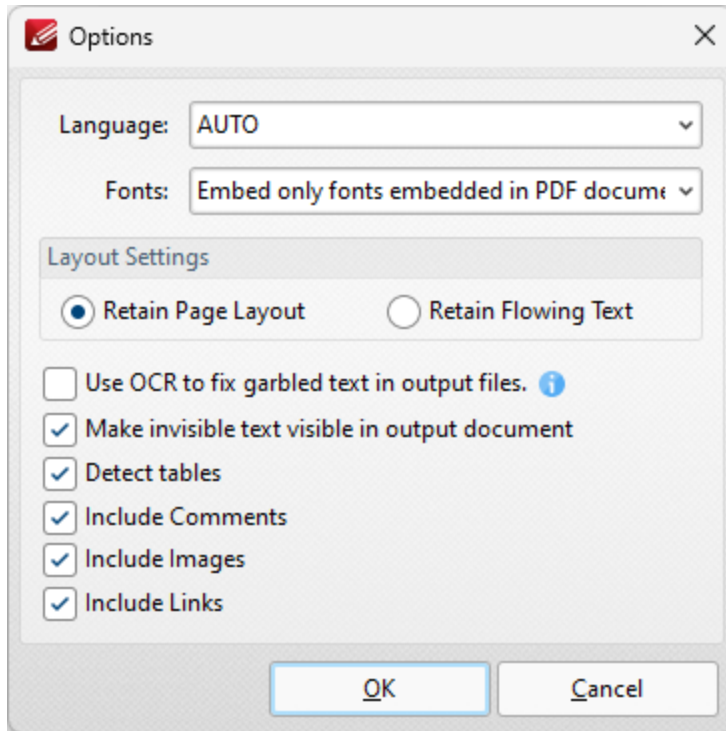
Figure 2. Options Dialog Box

- Use the **Language** dropdown menu to specify the language of the source document. This setting is necessary in cases where document text has the incorrect encoding and OCR is used to determine the correct unicode to use. **AUTO** is the default setting and the language is taken from the document properties when it is used.
- Use the **Fonts** dropdown menu to determine font embedding options.
- Select either the **Retain Page Layout** or the **Retain Flowing Text** button as desired. **Retain Page Layout** adds a page break after each page and a line break to lines that are shorter than other lines within the same paragraph. **Retain Flowing Text** retains the text flow as a priority over the page layout and will allow text to wrap if there are multiple columns of text.
- Select the **Use OCR to fix garbled text in output files** box to use the OCR engine to recognize symbols, which may resolve garbled output text in cases of documents with invalid character encoding.
- Select the **Make invisible text visible in output document** and **Include Comments/Images/Links** boxes as desired.

Click **OK** to export the document to **(*.docx)** format.

Please note that **MS Office** must be installed on the local computer for this feature to operate, and **Save As XPS** functionality must be available in the version of **MS Office** being used. This functionality was added in **MS Office 2007.**

5.1.11.3   Export to MS Excel Document

Export to MS Excel Document

Click **Export to Microsoft Excel Document** to export documents to **(*.xlsx)** format, which is intended for use with **Microsoft Excel.** The **MS Excel File** dialog box will open:
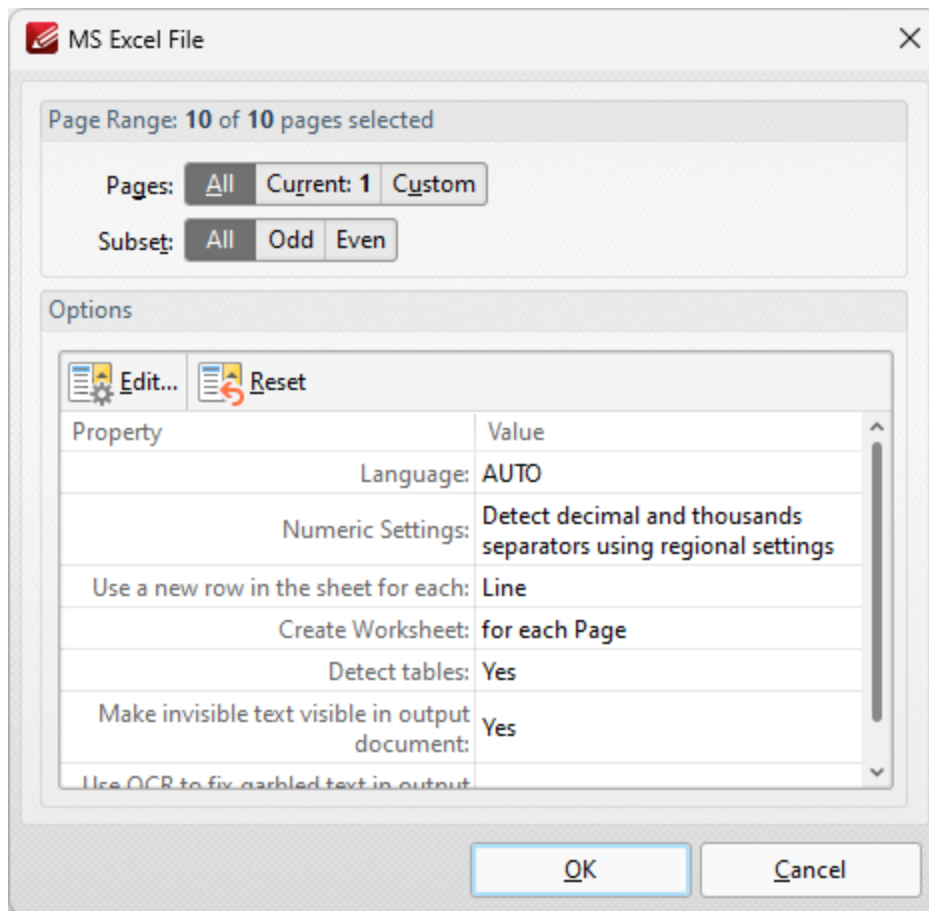
Figure 1. MS Excel File Dialog Box

- Use the **Pages** option to determine the pages to be exported to **(*.docx)** format.
- Use the **Subset** option to specify a subset of the page range as desired.
- Note that the current export settings are detailed in the dialog box. Click **Edit/Reset** to edit/reset these settings. When you click **Edit** the **Options** dialog box will open:
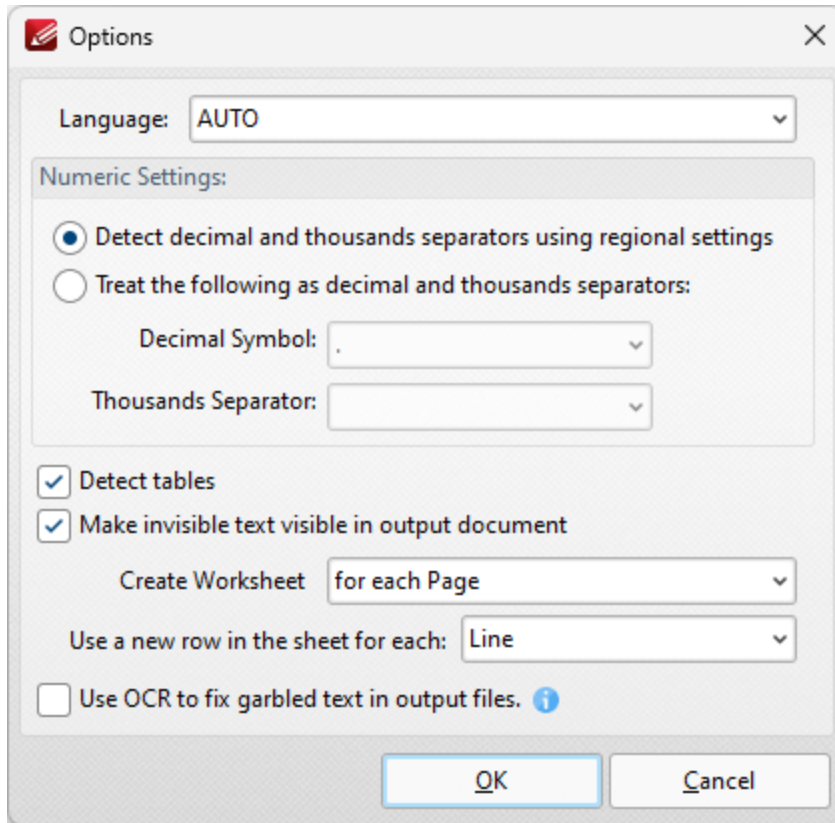
Figure 2. Options Dialog Box

- Use the **Language** dropdown menu to specify the language of the source document. This setting is necessary in cases where document text has the incorrect encoding and OCR is used to determine the correct unicode to use. **AUTO** is the default setting and the language is taken from the document properties when it is used.
- Select the **Detect decimal and thousands separators using regional settings** to specify the use of regional settings to determine the thousands separator in exported documents. Alternatively, select the second radio button and then select the desired symbols in the dropdown menus.
- Select the **Make invisible text visible in output document** box as desired.
- Use the **Create Worksheet** dropdown box to determine whether a worksheet is created for the whole document or for each page of the document.
- Select an option in the **Use a new row in the sheet for each** dropdown menu to determine how rows are defined in the output document.
- Select the **Use OCR to fix garbled text in output files** box to use the OCR engine to recognize symbols, which may resolve garbled output text in cases of documents with invalid character encoding.

Click **OK** to export the document to **(*.xlsx)** format.

Please note that **MS Office** must be installed on the local computer for this feature to operate, and **Save As XPS** functionality must be available in the version of **MS Office** being used. This functionality was added in **MS Office 2007.**

5.1.11.4 **Export to MS PowerPoint Document**

Export to MS Powerpoint Document

Click **Export to Microsoft Excel Document** to export documents to **(*.pptx)** format, which is intended for use with **Microsoft PowerPoint.** The **MS PowerPoint File** dialog box will open:
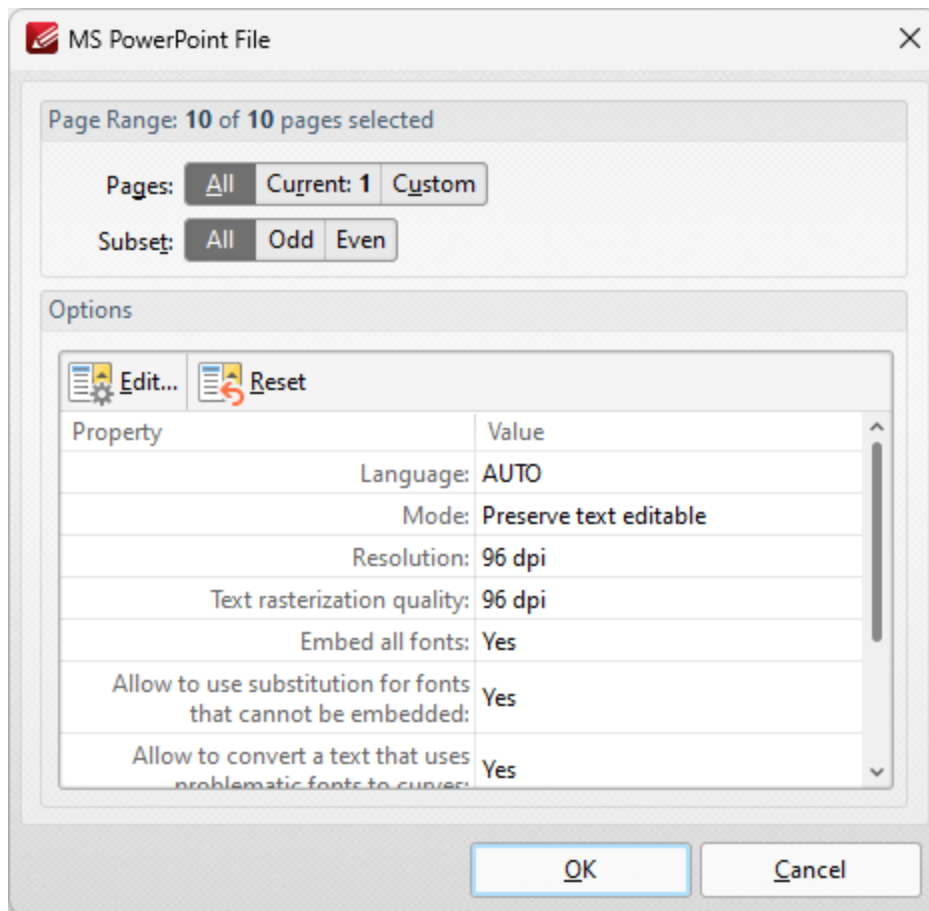
Figure 1. MS PowerPoint File Dialog Box

- Use the **Pages** option to determine the pages to be exported to **(*.pptx)** format.
- Use the **Subset** option to specify a subset of the page range as desired.
- Note that the current export settings are detailed in the dialog box. Click **Edit/Reset** to edit/reset these settings. When you click **Edit** the **Options** dialog box will open:
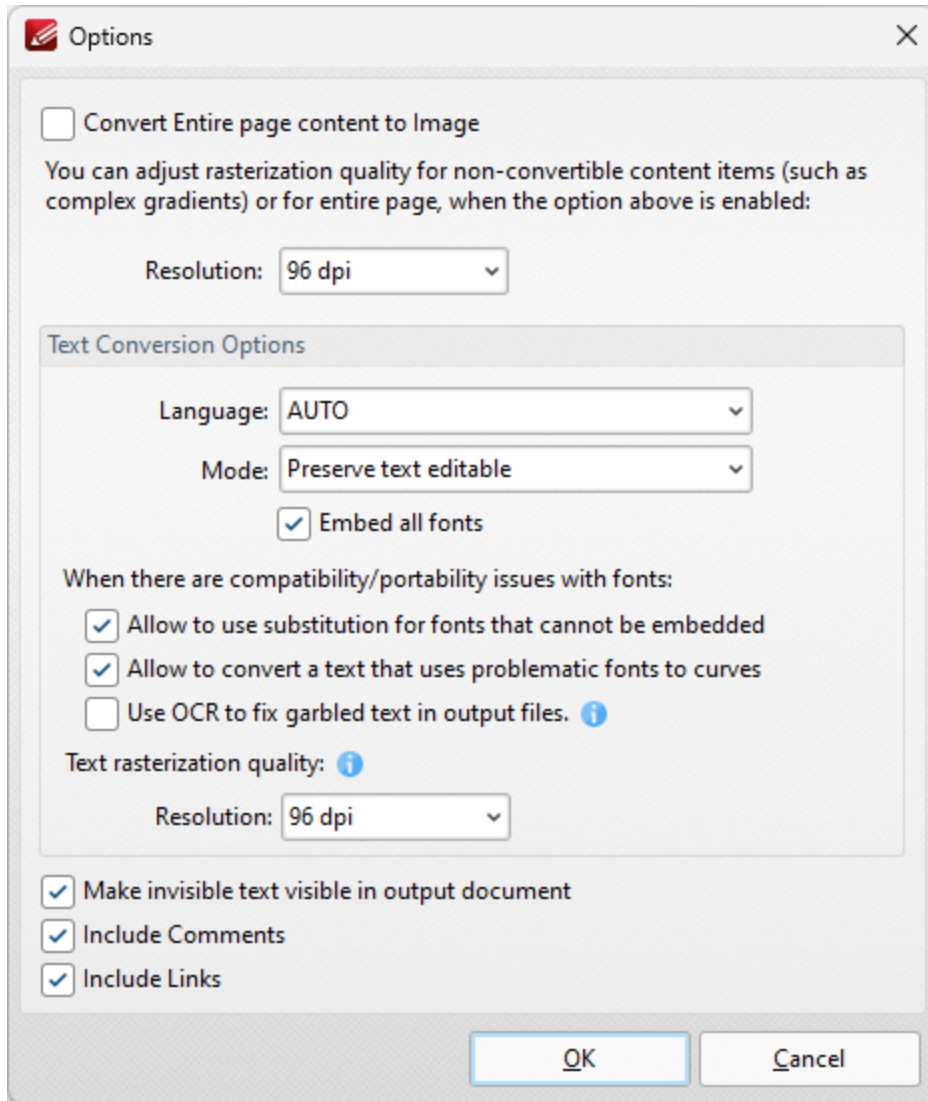
Figure 2. Options Dialog Box

- Select the **Convert Entire page content to Image** box to convert the entire document to image format in the output **(*.pptx)** document.
- Use the **Resolution** dropdown menu to determine the resolution of the image when the **Convert Entire page content to Image** option is used.
- Use the **Language** dropdown menu to specify the language of the source document. This setting is necessary in cases where document text has the incorrect encoding and OCR is used to determine the correct unicode to use. **AUTO** is the default setting and the language is taken from the document properties when it is used.
- Use the **Mode** dropdown menu to determine the text conversion mode.
- Select the **Embed all fonts** to embed all fonts in the source document into the output document.
- Select the **Allow to use substitution for fonts that cannot be embedded** to enable the substitution of fonts that cannot be embedded.

- Select the **Allow to convert a text that uses problematic fonts to curves** to enable the conversion of text to curves in cases of problematic fonts.
- Select the **Use OCR to fix garbled text in output files** box to use the OCR engine to recognize symbols, which may resolve garbled output text in cases of documents with invalid character encoding
- Use the **Resolution** dropdown menu to determine the resolution of rasterized text in cases where it cannot be converted according to the settings specified in the dialog box.
- Select the **Make invisible text visible in output document** and **Include Comments/Links** boxes as desired.

Click **OK** to export the document to **(*.pptx)** format.

Please note that **MS Office** must be installed on the local computer for this feature to operate, and **Save As XPS** functionality must be available in the version of **MS Office** being used. This functionality was added in **MS Office 2007.**

5.1.12   Print Options

Print Options

Click **Print** (or press Ctrl+P) to print the current document:
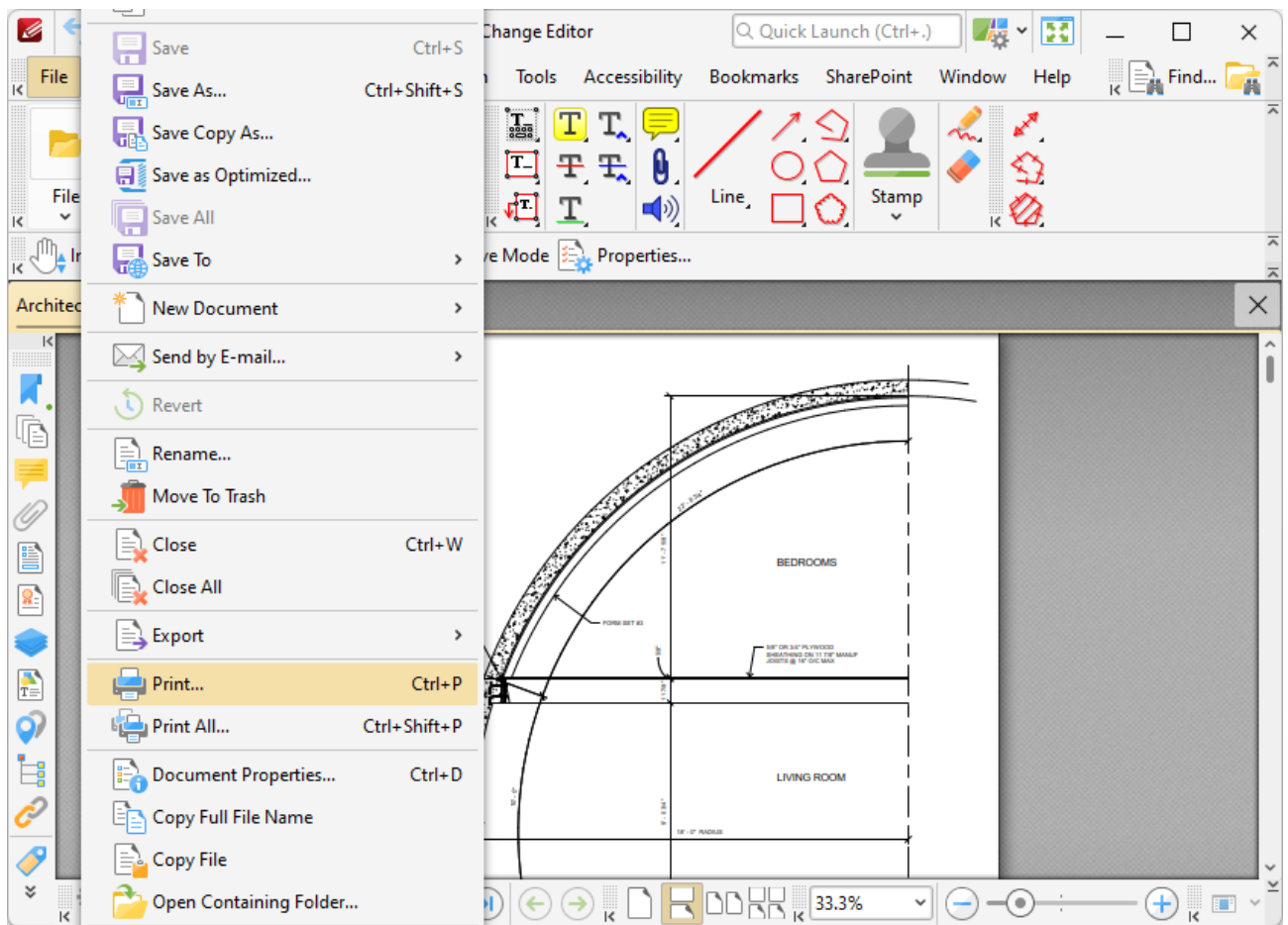
Figure 1. File Tab Submenu, Print

The **Print** dialog box will open:
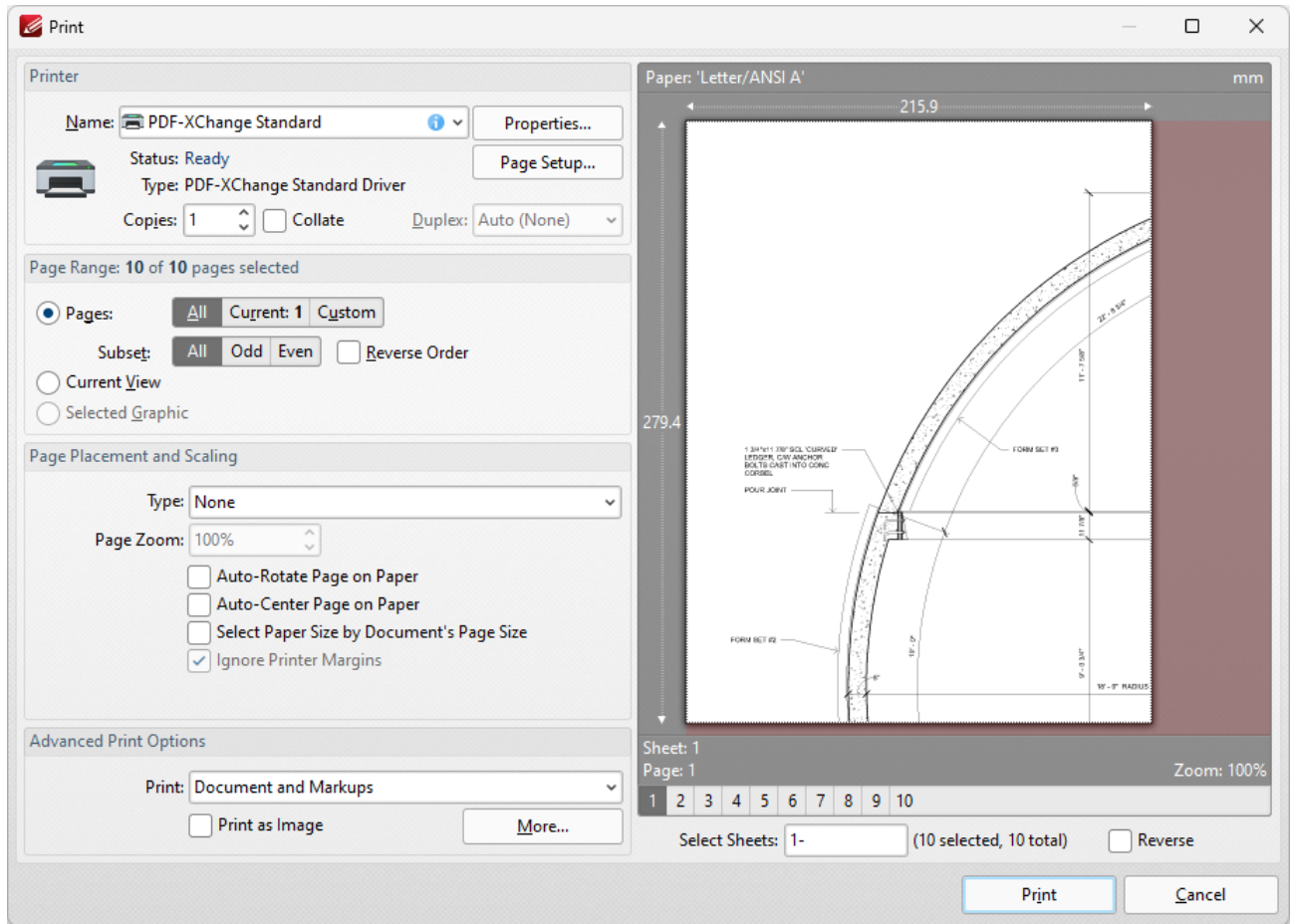
Figure 2. Print Dialog Box

- 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 for the selected printer.
  - Click the **Page Setup** button to open the **Page Setup** dialog box. See *(figure 3)* below.
- The options in the **Page 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. See **here** 1274 for further information.
  - 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 **More** for further options. See *(figure 4)* below.
  - 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.
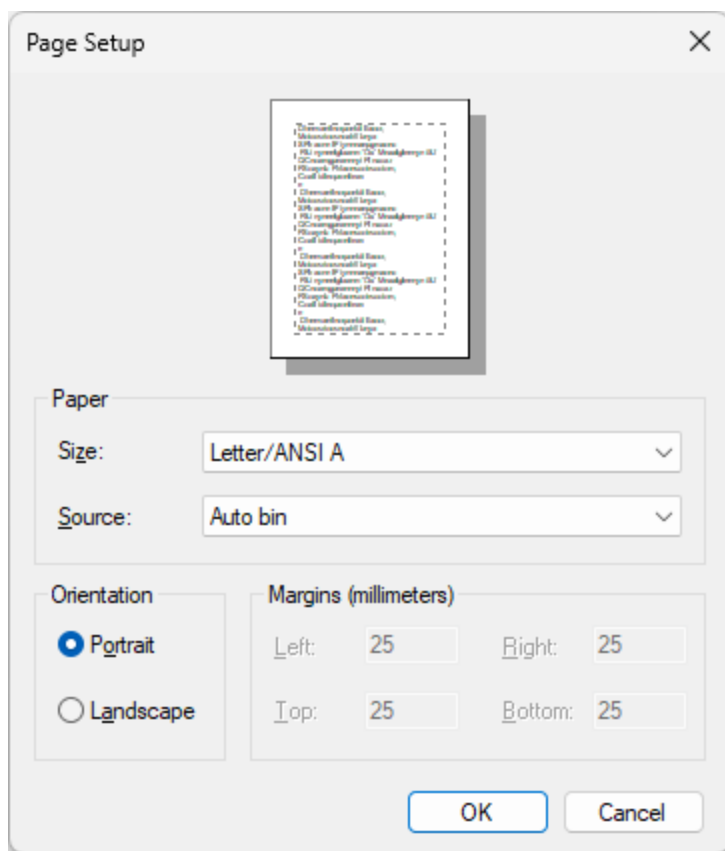
Figure 3. Page Setup Dialog Box

- 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.
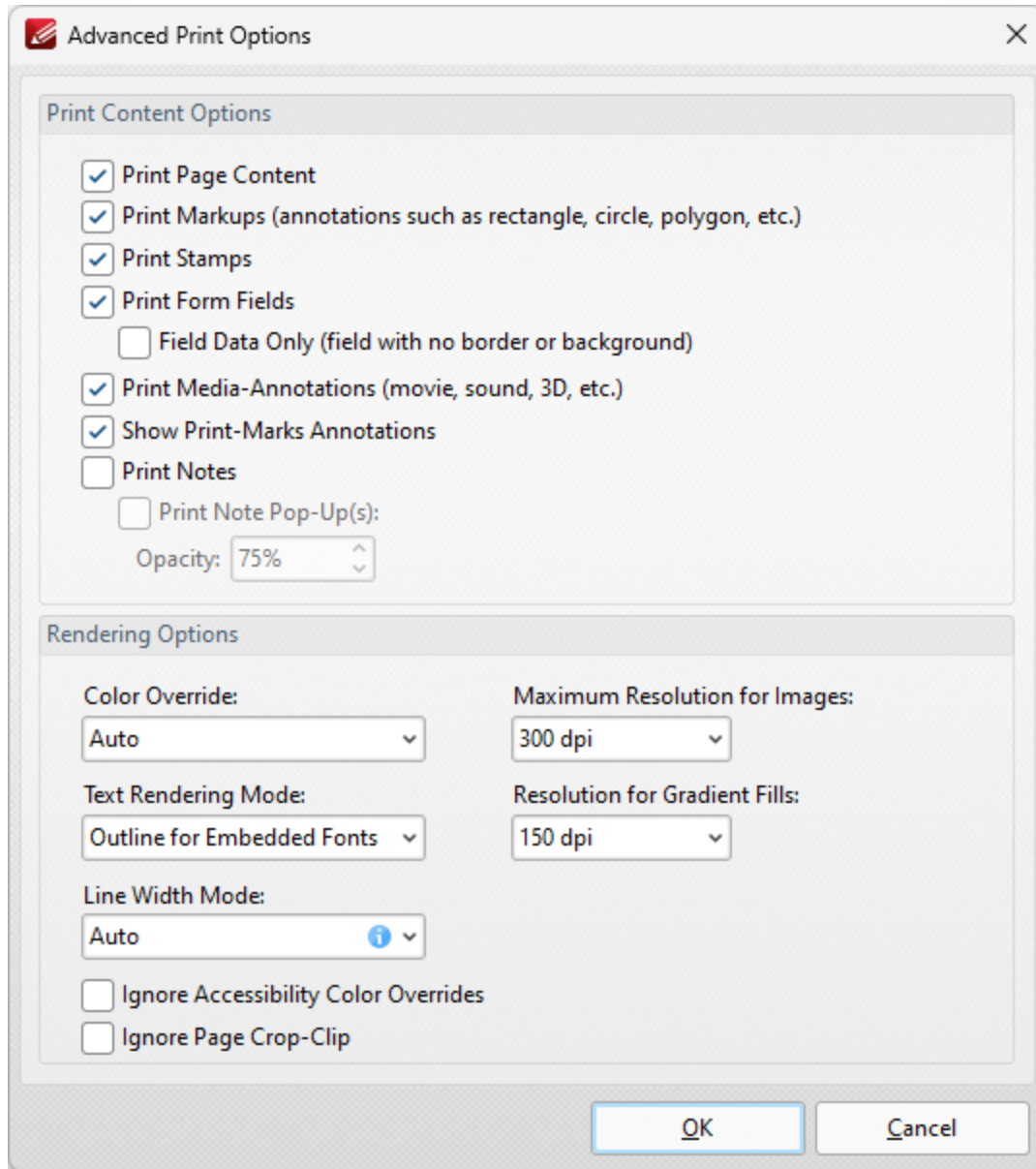
Figure 4. Advanced Print Options Dialog Box

- Use the **Print Content Options** to determine printed document content.
- Use the **Rendering Options** to determine how documents are rendered:
    - Use the **Color Override** dropdown menu to determine color override options:
        - **Auto** permits **PDF-XChange Editor** to select the color override setting.
        - **Grayscale** prints documents in grayscale.
        - **Monochrome** prints documents in monochrome.
        - **Color** prints documents in color.
    - Use the **Text Rendering Mode** dropdown menu to determine how text is rendered:
        - **Auto** permits **PDF-XChange Editor** to select the text rendering mode. Additionally, it should be noted that this option is required in order to print embedded fonts.

- **Outline for Embedded Fonts** prints embedded fonts as outlines, which are vector images.
- **Outline Always** prints all fonts as outlines.
- **Bitmap for Embedded Fonts** prints embedded fonts as bitmap images.
- **Bitmap Always** prints all fonts as bitmap images.
- Use the **Maximum Resolution for Images** dropdown menu to set the maximum resolution of images in printed documents.
- Use the **Resolution for Gradient Fills** dropdown menu to determine the resolution used for gradient fills.
- Select the **Ignore** check boxes as desired.

Print All

Click **Print All** (or press Ctrl+Shift+P) to print all open documents in the current window as a single document:
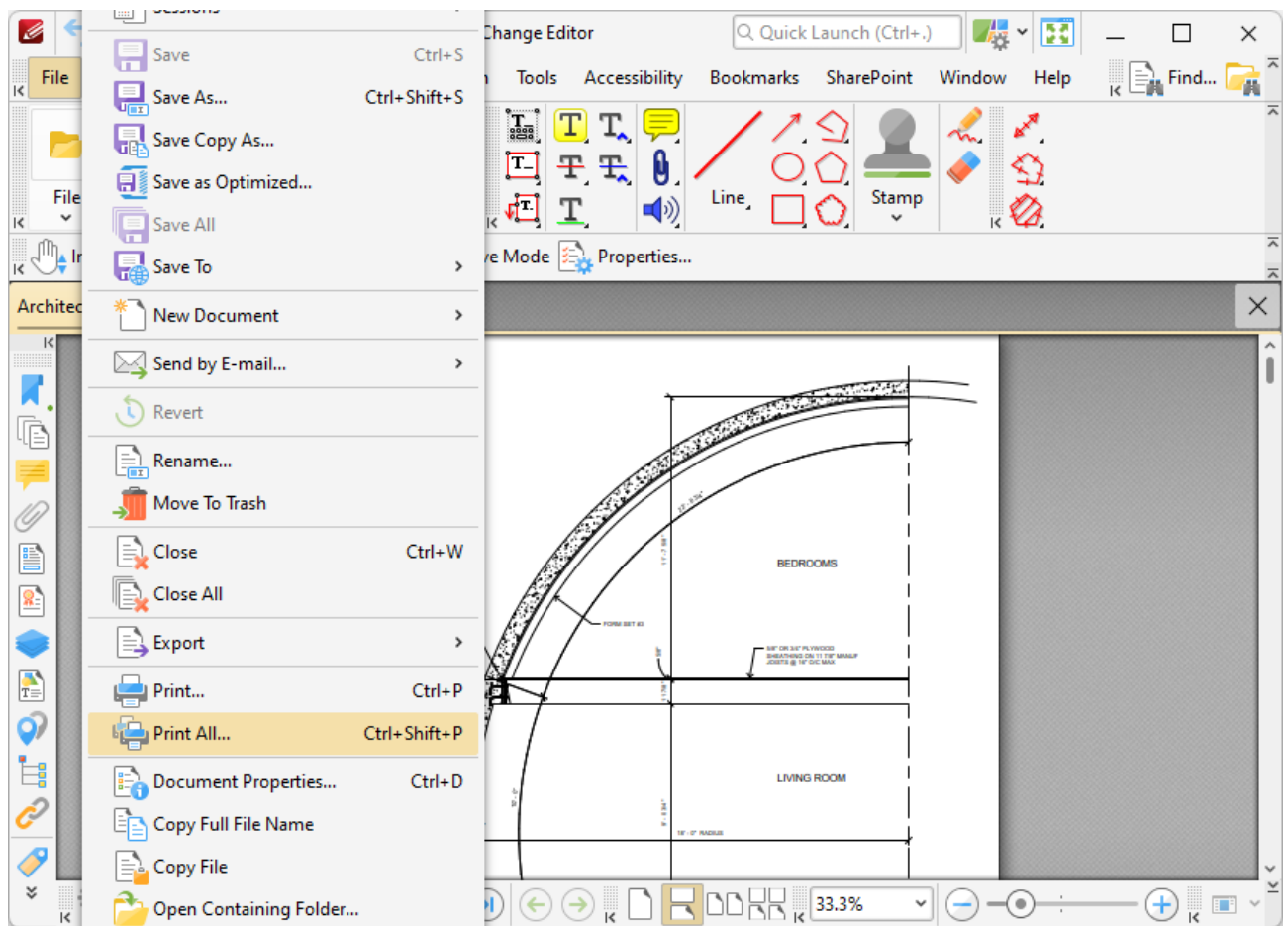
Figure 5. File Tab Submenu, Print All

The **Print** dialog box will open, as detailed above. Set the desired printing parameters and then click **Print** to print all open documents in the current window as one document.

5.1.13   **Document Properties**

Document Properties

Click **Document Properties** to view and edit document properties:
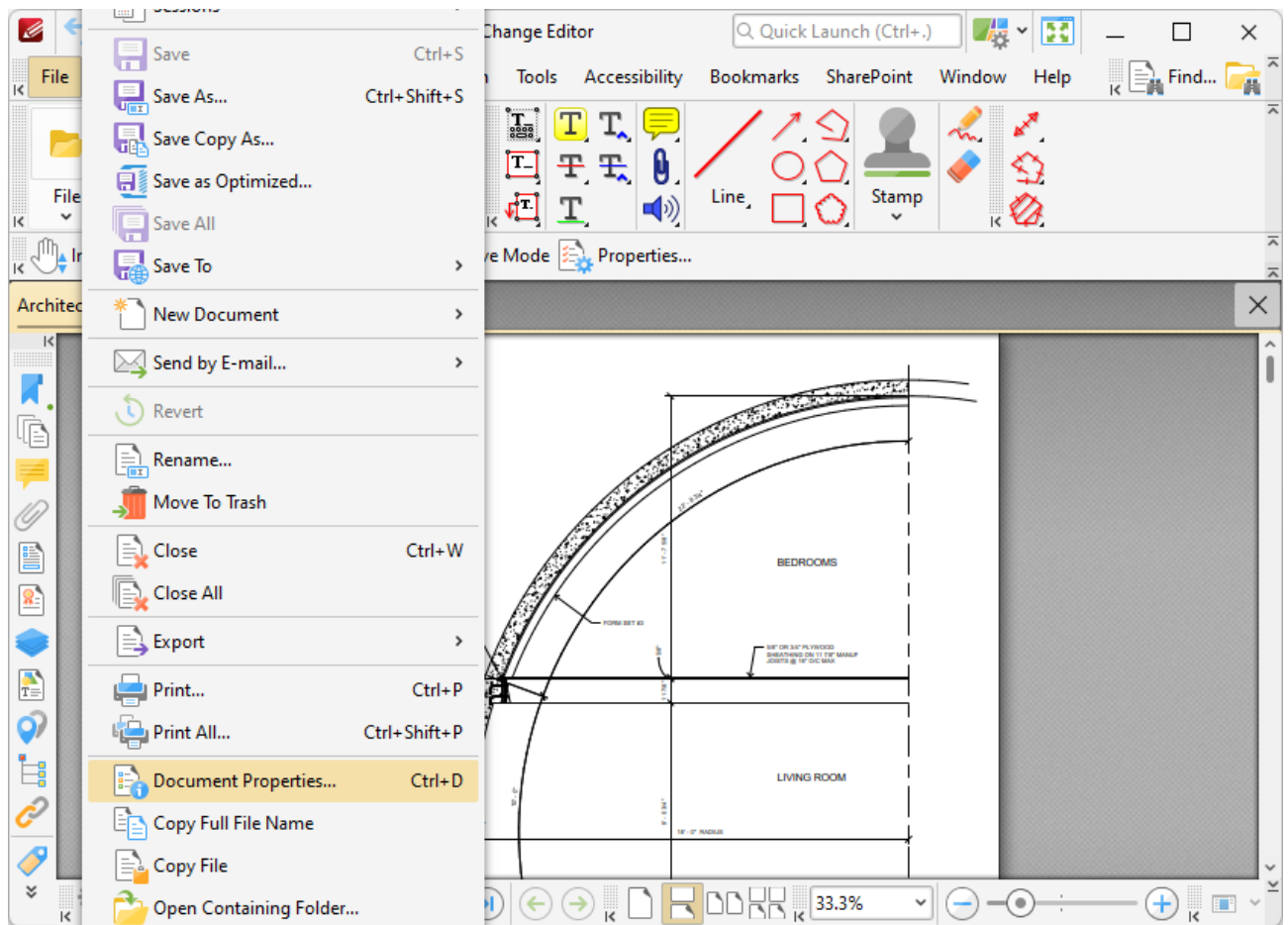
Figure 1. File Tab Submenu, Document Properties

The **Document Properties** dialog box will open:
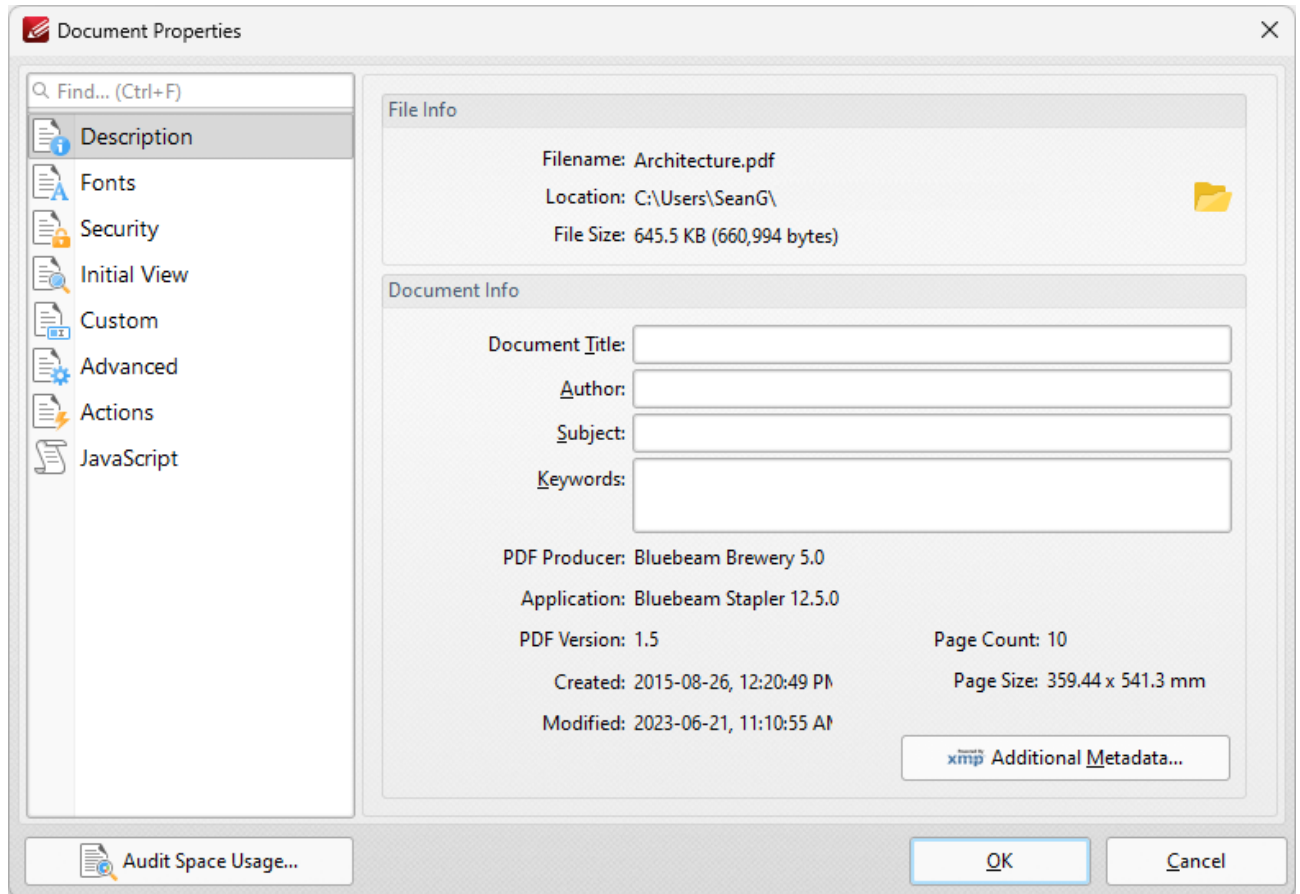
Figure 2. Document Properties Dialog Box, Description Option Selected

- Please note that the keyboard shortcut Ctrl+D can also be used to launch this dialog box.
- Click **Audit Space Usage** to view a breakdown of space usage in the document.

Select an option from the **Categories** menu to view/edit properties:

Description

This option displays details about the current document, as detailed in *(figure 2).*

- 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 document details:
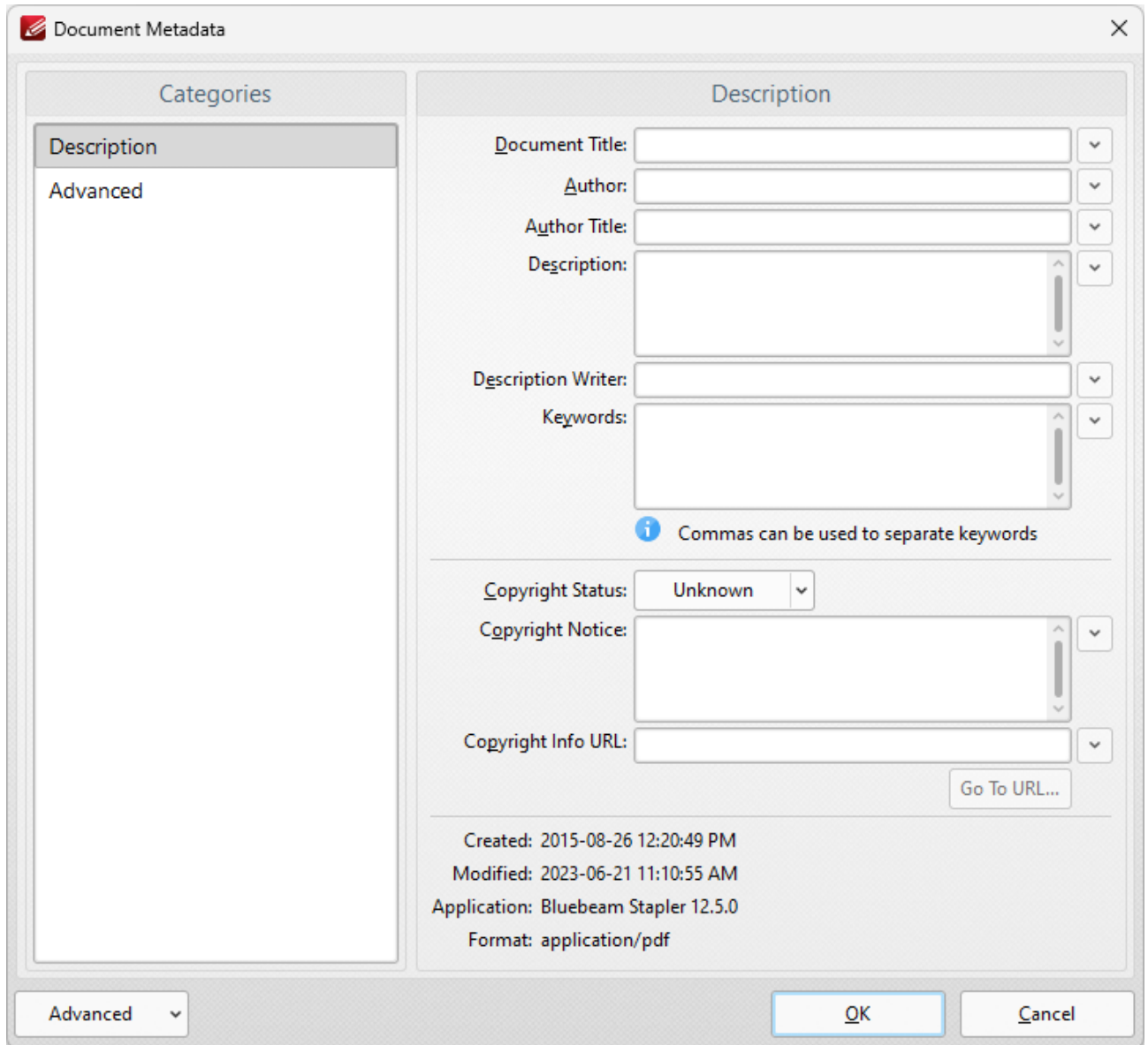
Figure 3. Document Metadata Dialog Box, Description Tab

- Use the text boxes to view/edit document metadata.
- Click **Advanced** in the **Categories** menu to view the metadata structure of the document, as detailed below.
- Use the options in the **Advanced** dropdown menu to save the metadata template of the document or show the templates folder on the local machine.
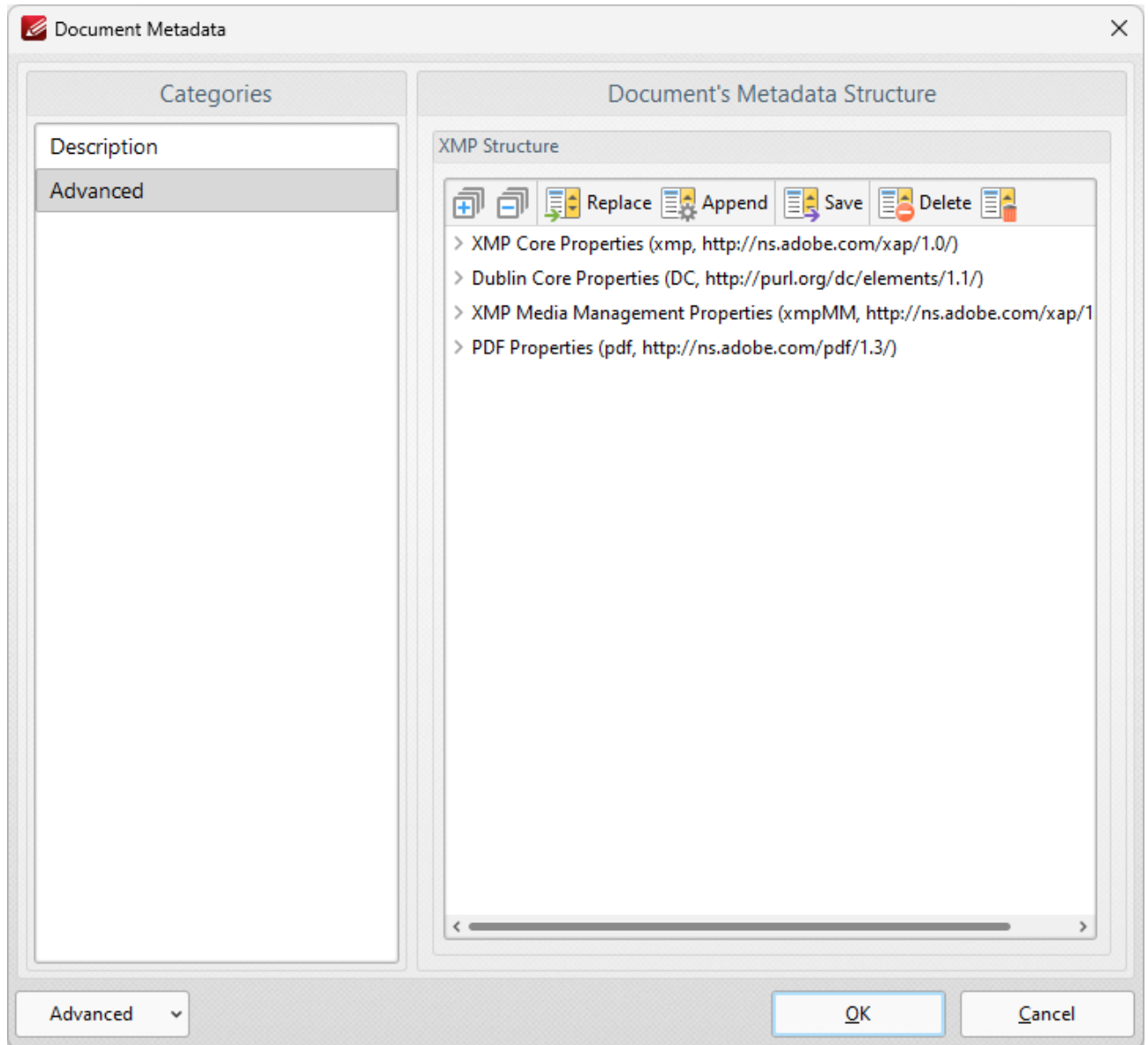
Figure 4. Document Metadata Dialog Box, Advanced Tab

Existing document metadata is detailed in the pane on the right. Click options in the dialog box to **Replace, Append, Save, Delete** or **Remove All** document metadata as desired.

Fonts

This option displays details about document fonts. Please note that the information displayed is read-only. The **Save as Optimized** 98 settings can be used to customize font embedding options.

Security

This option displays document security details:
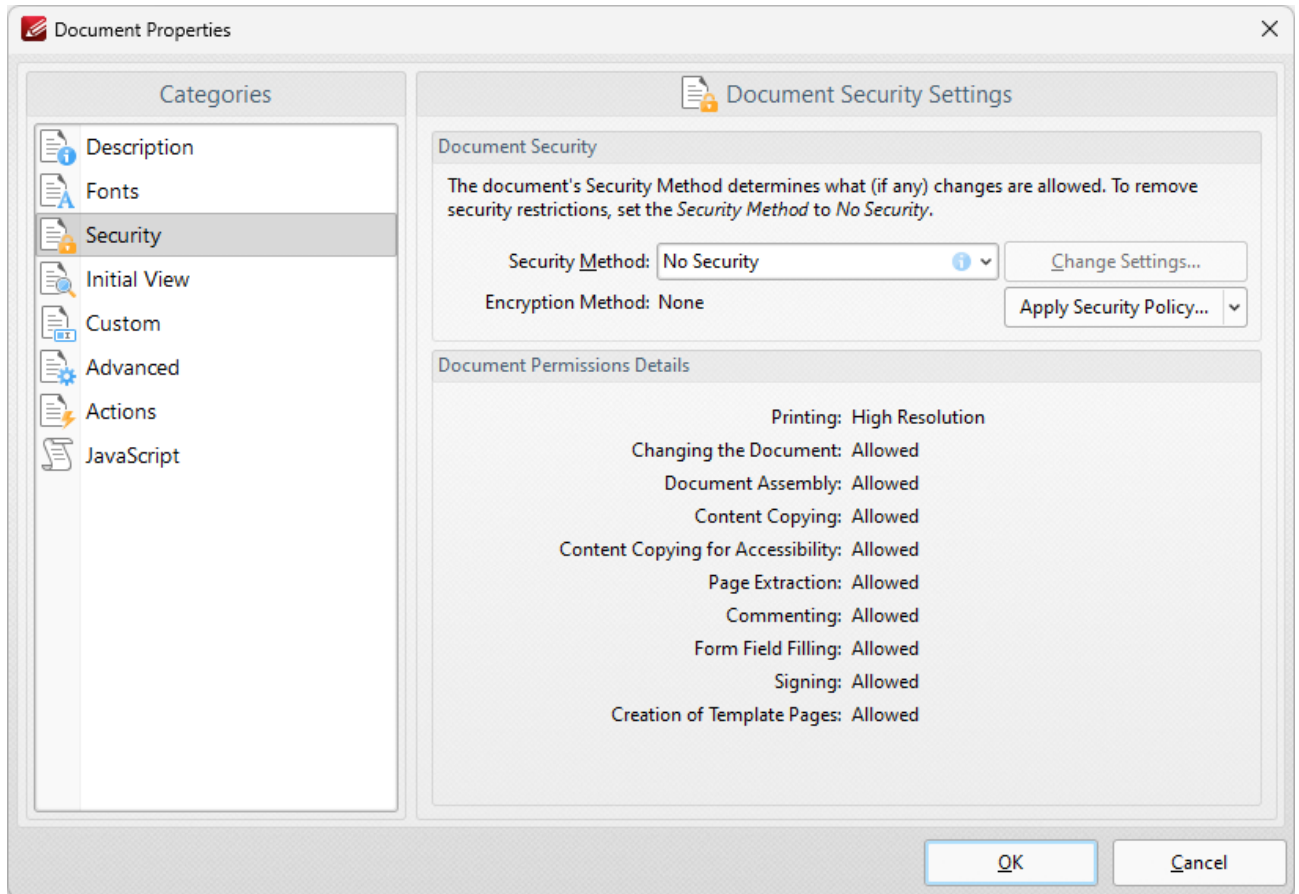
Figure 5. Document Properties Dialog Box, Security Option Selected

- 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 6)* will open.
  - The **Certificate Security** option is available only when documents feature certificate security.
  - The **Microsoft Azure Information Protection** option is available only when documents feature **Microsoft Azure** 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, as detailed in *(figure 7).*
  - Additional security options are available **here.** [294]

Click **OK** to save settings.
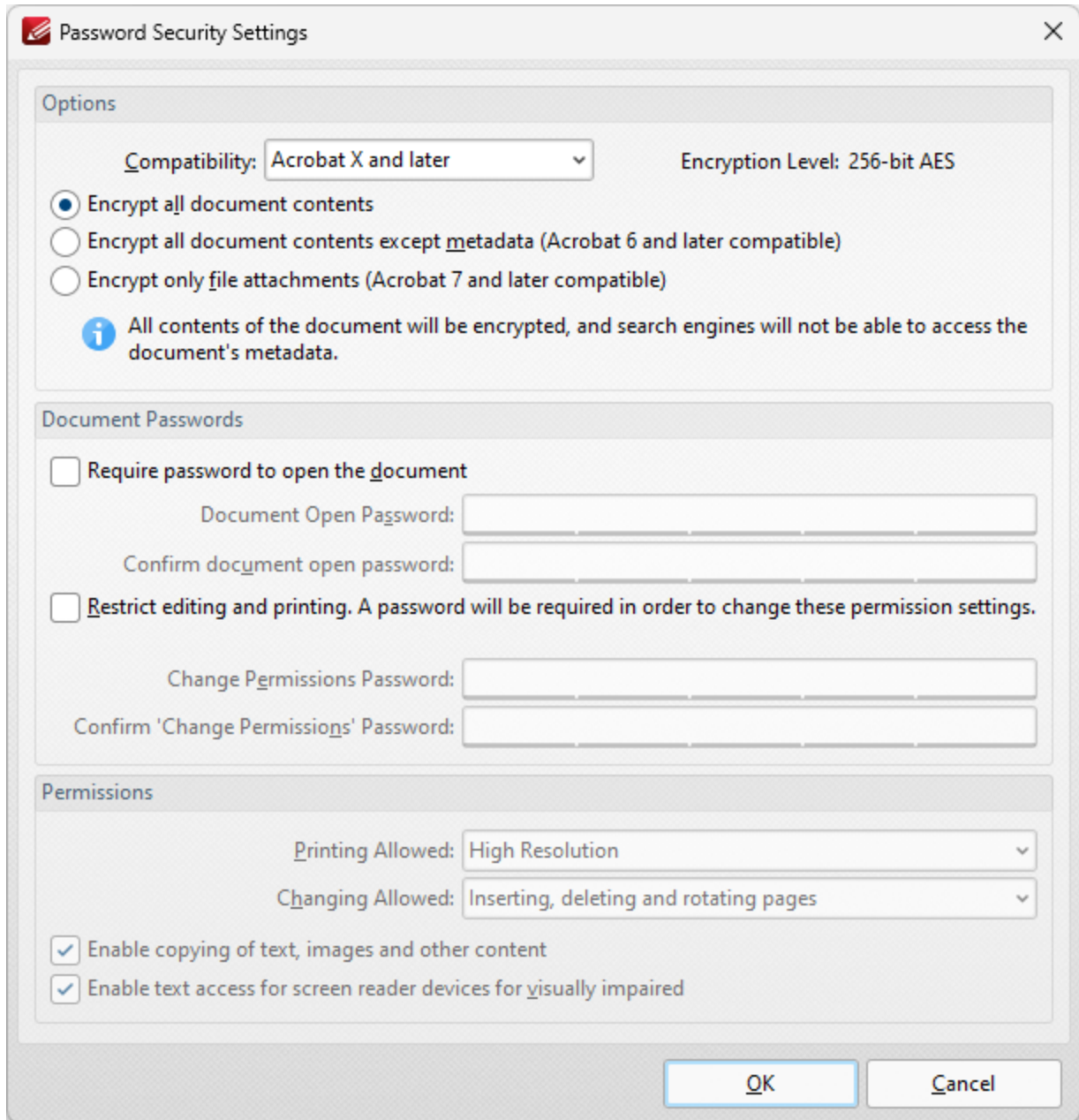
Figure 6. Password Security Settings

- Use the **Compatibility** menu to set the document security compatibility.
- Select an encryption option button to determine which elements of documents are encrypted.
- 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 dropdown menus and check boxes in the **Permissions** section to select the settings that these passwords will enable.

Click **OK** to save settings.
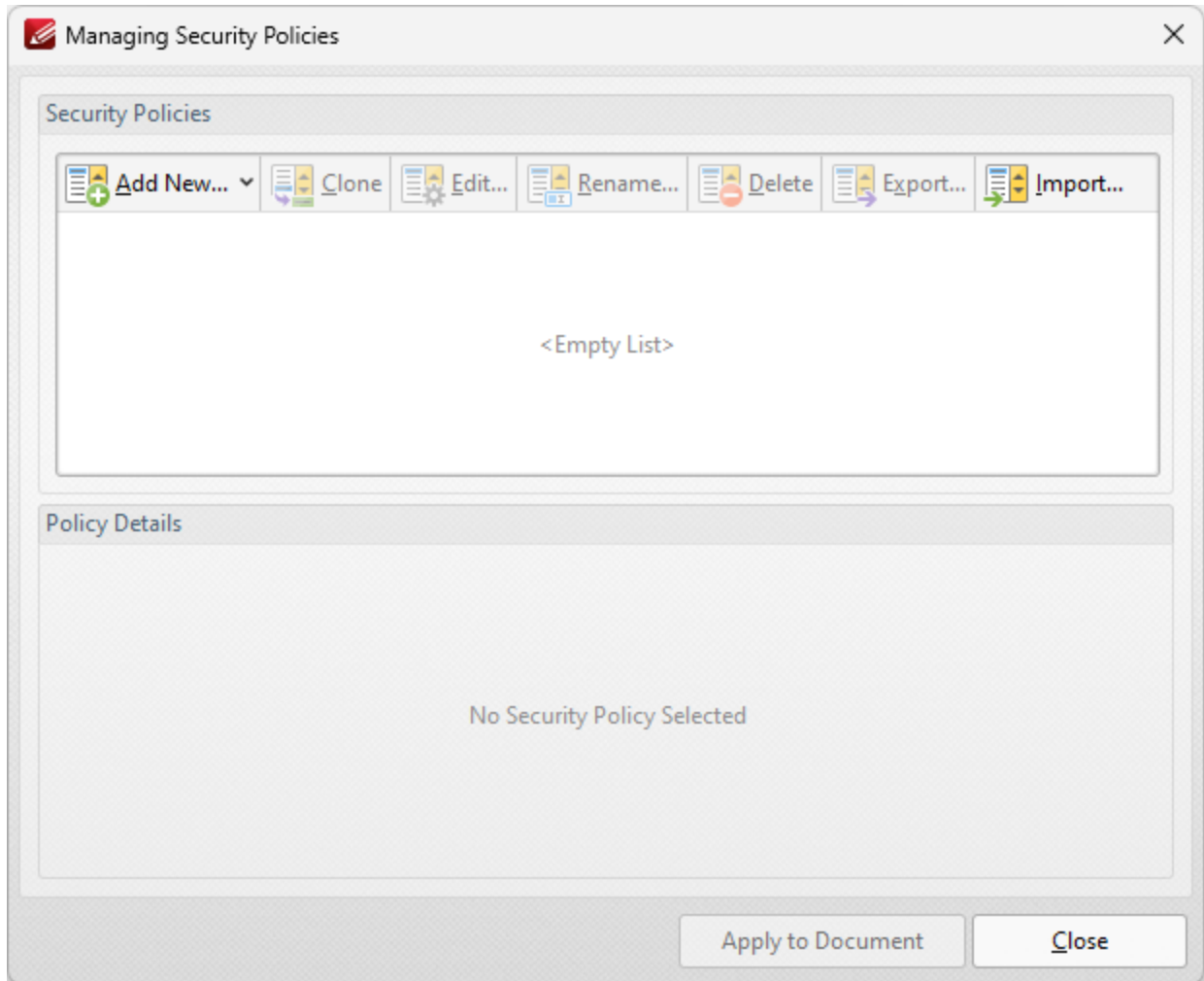
Figure 7. Managing Security Policies Dialog Box

This dialog box is used to create and manage security policies:

- Click **Add New** to add a new security policy. The **Password Security Settings** dialog box detailed in *(figure 6)* will open. Determine parameters as desired then click **OK** to save.
- Click **Clone/Edit/Rename/Delete** to perform these operations on selected security policies.
- Click **Export** to export the security policy for subsequent use. Exported polices can be imported with the **Import** button, which is on the right of the **Export** button.
- Click **Apply to Document** to apply the security policy selected in the **Managing Security Policies** dialog box to the current document.

Initial View

These settings determine the layout when files are opened:
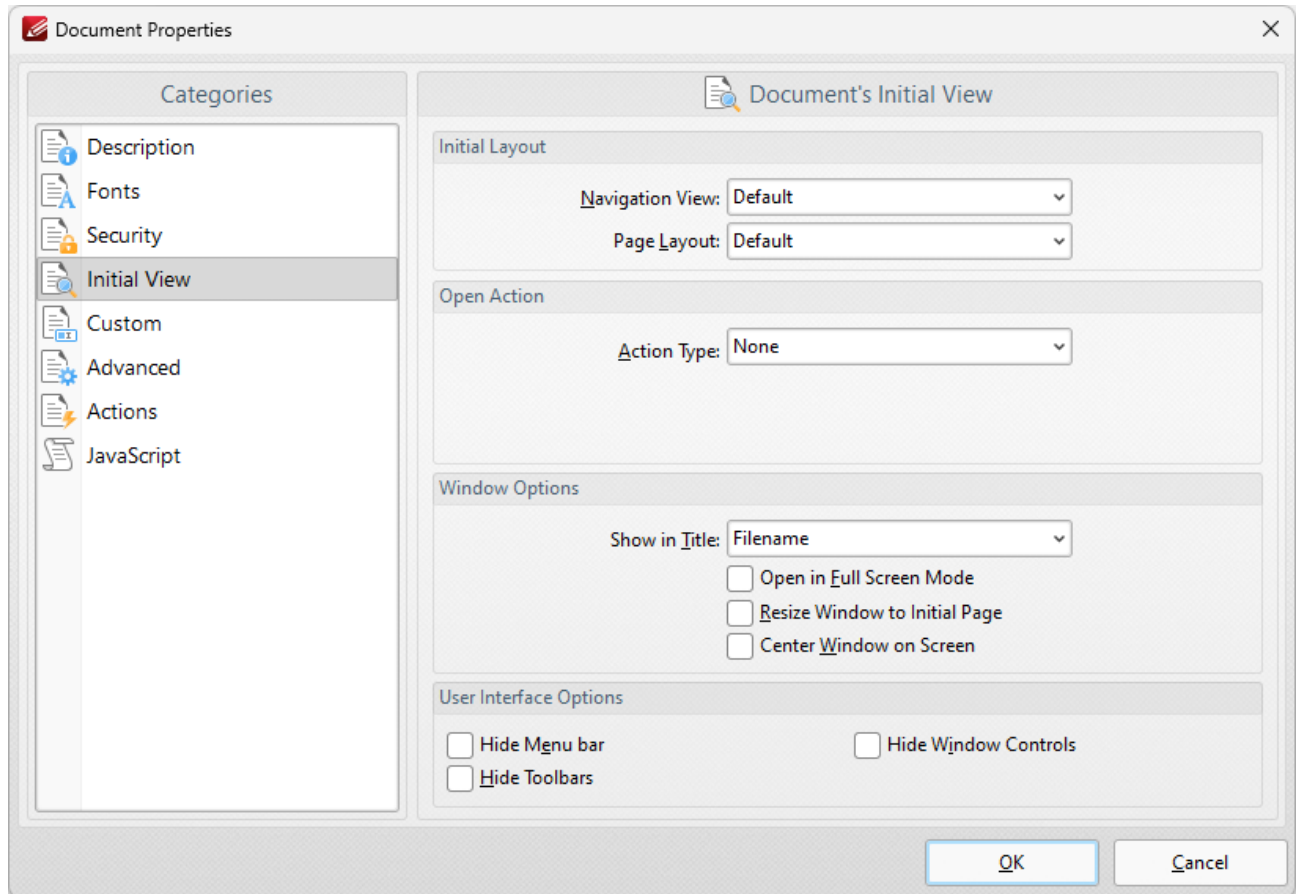
Figure 8. Document Properties Dialog Box, Initial View Option Selected

The **Initial View** 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 **Action Type** menu determines the action performed when documents are opened:
  - Select **None** for no action to be performed when documents are opened.
  - Select **Goto Page** to open documents to a specific page. When this option is selected, the **Open to Page** and **Magnification** dropdown menus will become available. Select options in those menu to determine the page at which documents are opened, and the type of magnification used. The **Magnification** options are detailed below:
    - Select **Default** to retain the default settings of the application used to open documents.
    - Select **Actual Size** to view pages at 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.
    - Alternatively, select an option from the list of numerical percentages to determine the magnification level.

The **Window Options** are as follows:

- **Show in Title** determines the name displayed 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.
- Select the **Resize Window to Initial Page** box to resize the viewing window according to the dimensions of the first page of the document.
- 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 Toolbar** 473 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.

Click **OK** to save settings.

Custom

These settings determine custom document properties:
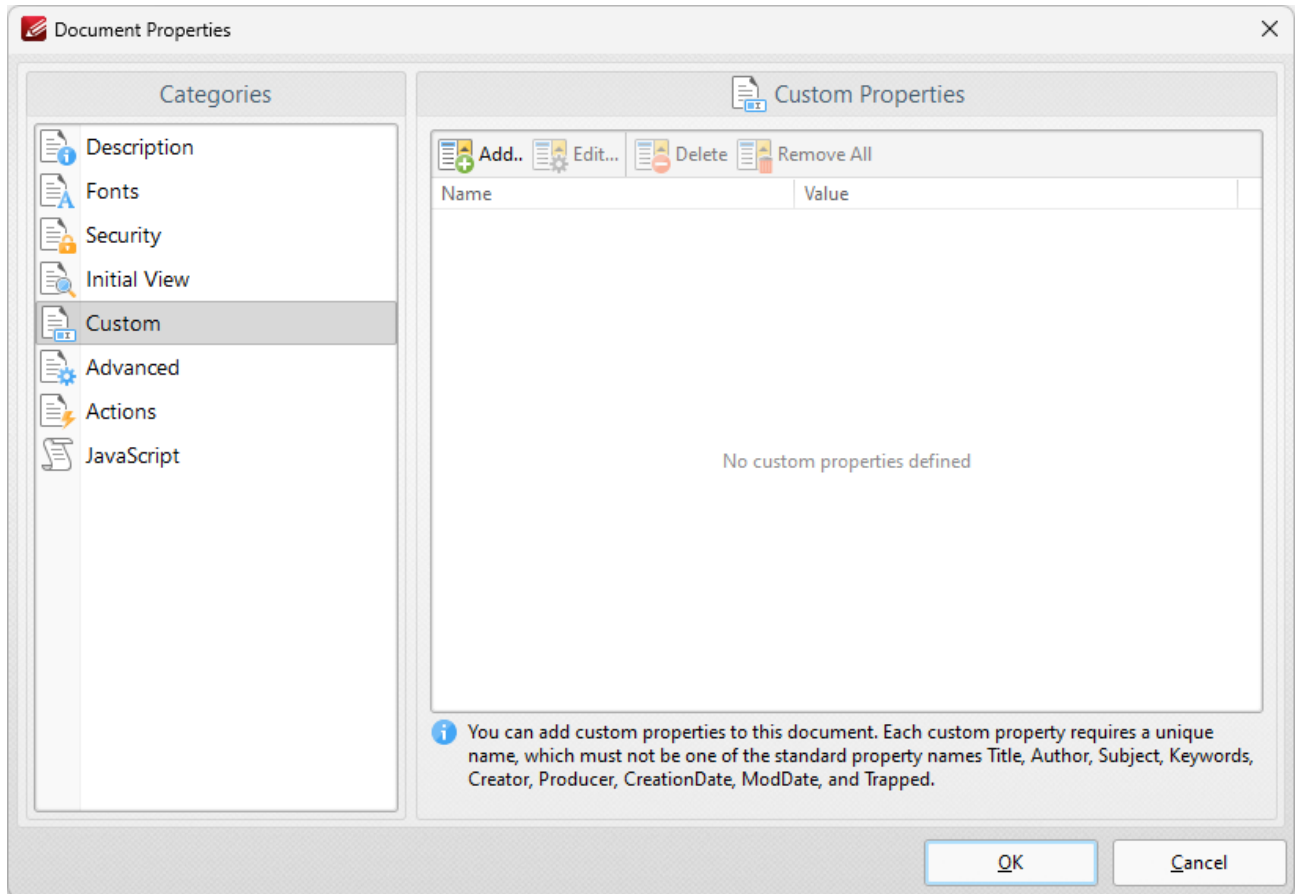
Figure 9. Document Properties Dialog Box, Custom Option Selected

- Click **Add** to add custom document properties to documents. The **Custom Document Property** dialog box will open. Enter a name and value for the property, then click **OK** to create it.
- Click **Edit** to edit selected custom document properties.
- Click **Delete** to delete selected custom document properties.
- Click **Remove All** to remove all custom document properties.

Advanced

These settings determine advanced document properties:
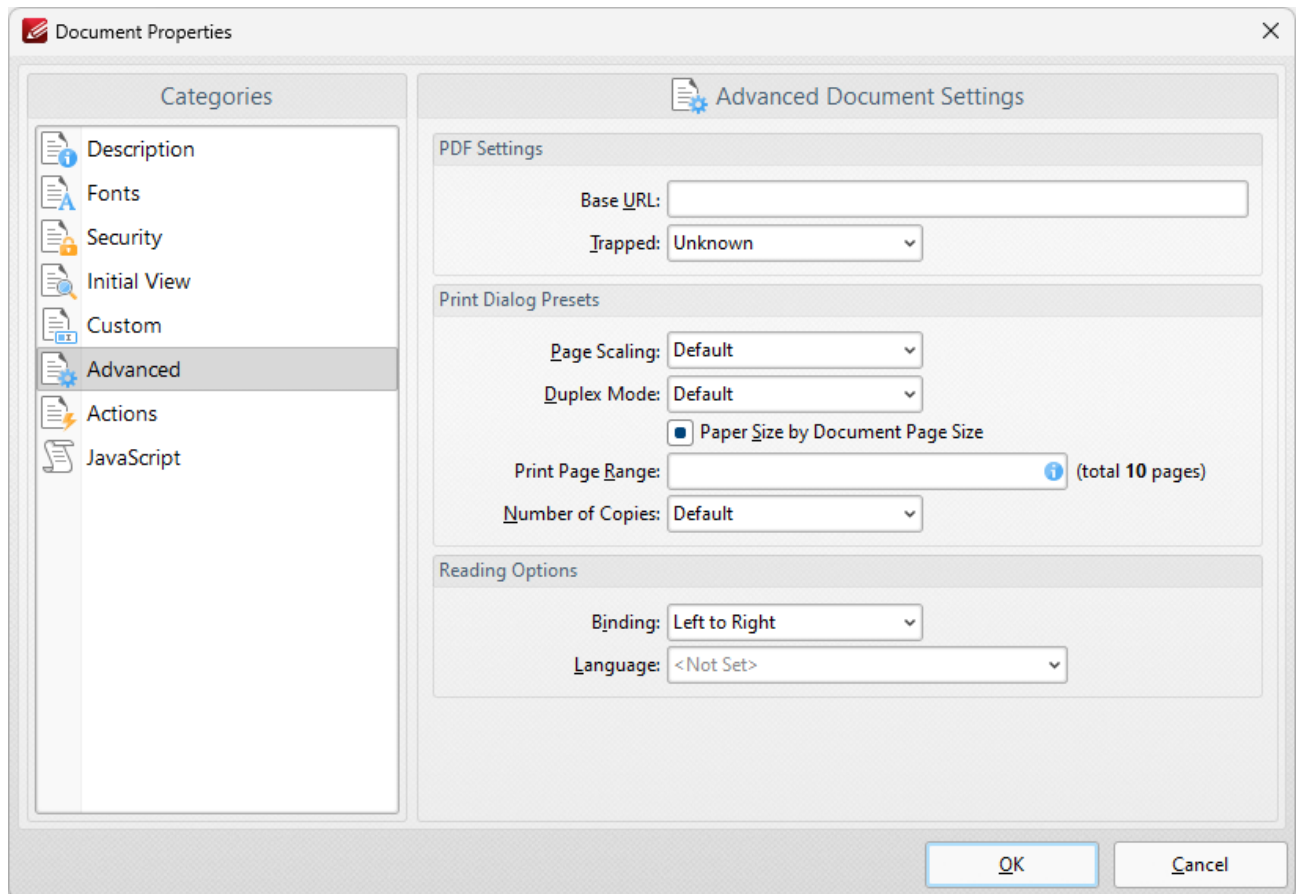
Figure 10. Document Properties Dialog Box, Advanced Option Selected

- 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 this setting can be used 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.

- Select the **Print Dialog Presets** box to override the viewing application's default print settings with those specified within the file itself:
  - Select an option in the **Page Scaling** dropdown menu to determine the page scaling used:
    - **Default** retains the default settings.
    - **None** disables page scaling.
  - Select an option in the **Duplex Mode** dropdown menu to determine the default duplex mode for printing.

- Select the **Paper Size by document Page Size** box to use the size of the document pages to determine the paper size of the document.
- Enter the pages to be printed in the **Print Page Range** text box. Further information on the specification of page ranges is available **here.** 1274
- Use the **Number of Copies** dropdown menu to determine how many copies of the document are printed.

- Select the **Reading Options** box to enable binding and language options:
  - Select eithe **Left to Right** or **Right to Left** as the document **Binding** option.
  - Select an option in the **Language** dropdown menu to determine the language of the document.

Actions

These settings enable the activation of JavaScript commands when documents close/save/print:
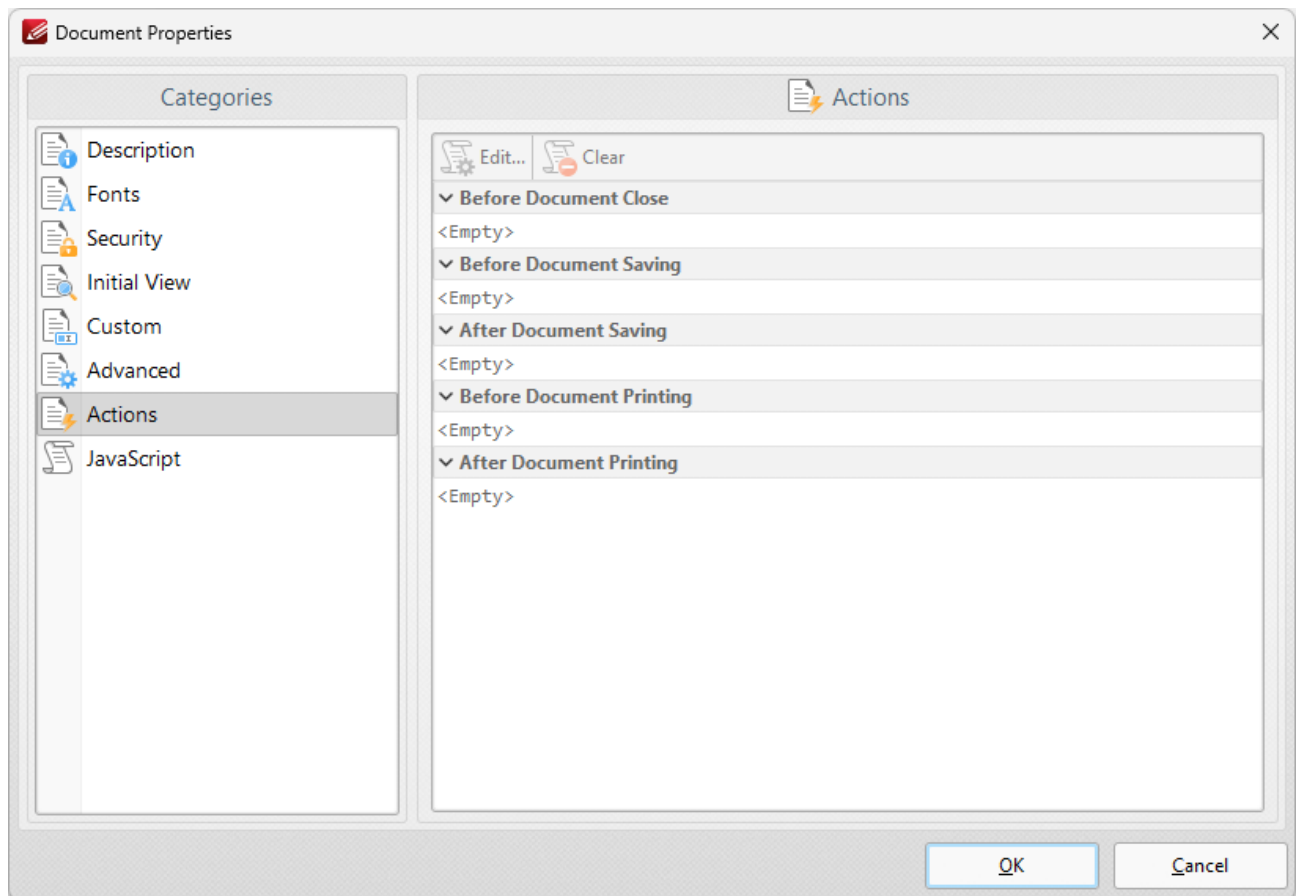
Figure 11. Document Properties Dialog Box, Actions Option Selected

These settings can be used to enable JavaScript commands when the following operations take place:

- **Before Document Close**

- **Before Document Saving**
- **After Document Saving**
- **Before Document Printing**
- **After Document Printing**

Double-click the text box beneath operations to add JavaScript, as detailed **here.** 995

Click **OK** to save settings.

JavaScript

This options details JavaScript in the active document:
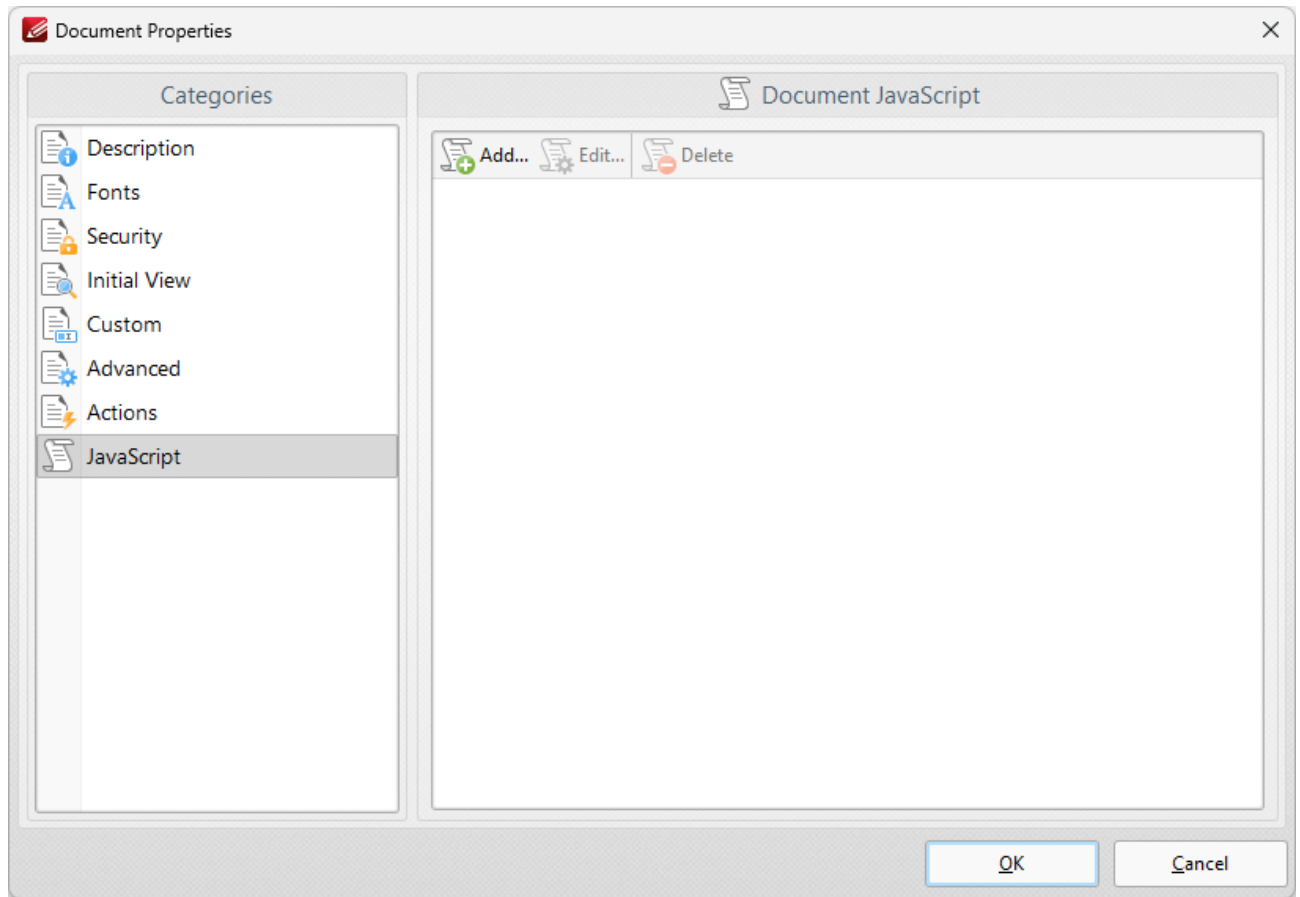
Figure 12. Document Properties Dialog Box, JavaScript Option Selected

JavaScript is a high-level programming language that can be used to perform a range of operations. Click **Add, Edit** or **Delete** to add/edit/delete JavaScript. See **here** for an index of existing JavaScript operations that **PDF-XChange Editor** supports and additional information about JavaScript.

5.1.14   Audit Space Usage

Audit Space Usage

Click **Audit Space Usage** to view a breakdown of space usage in the document:
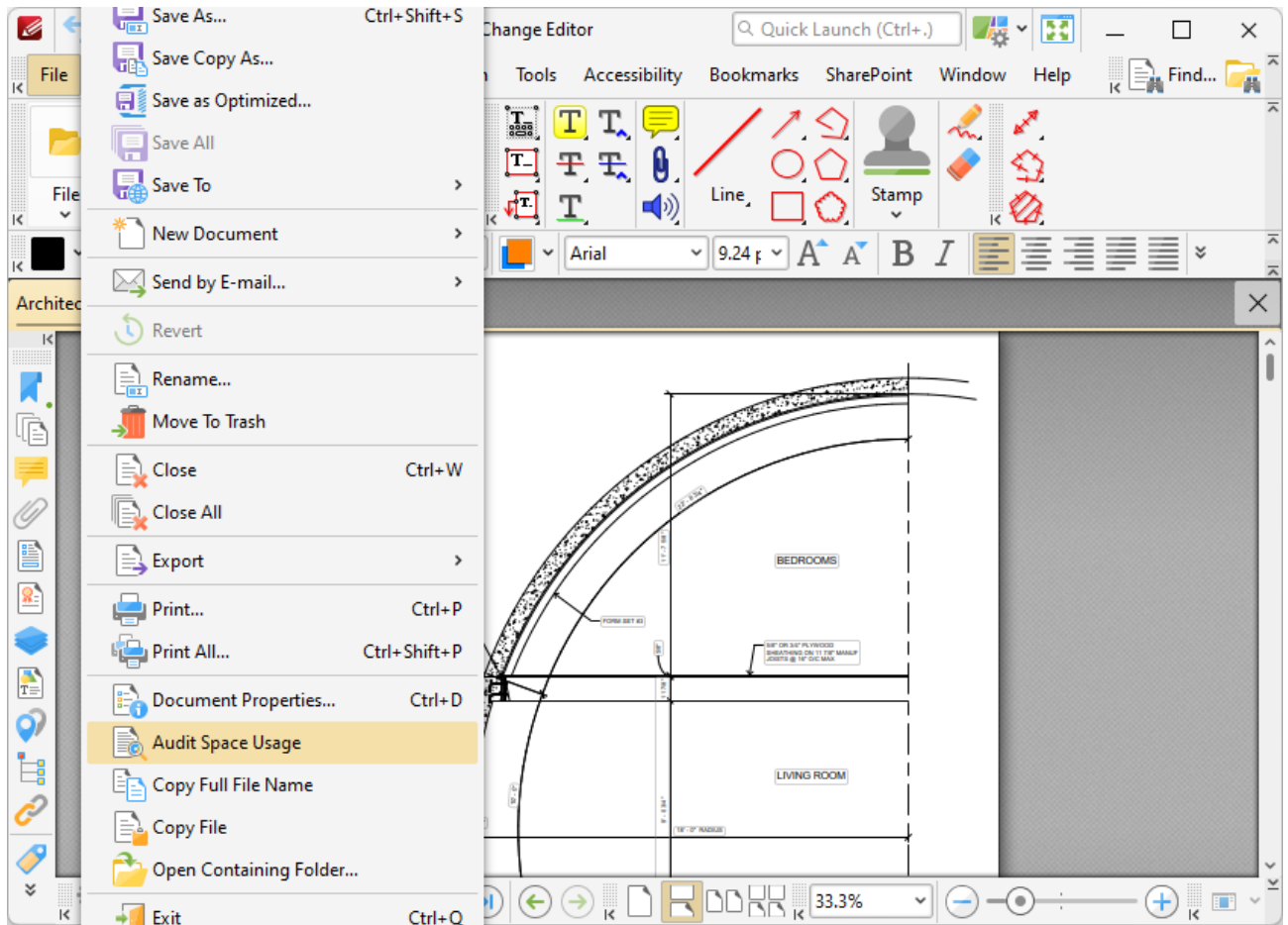
Figure 1. File Tab Submenu, Audit Space Usage

The **Audit Space Usage Report** dialog box will open. This dialog box details how space is used in the document:
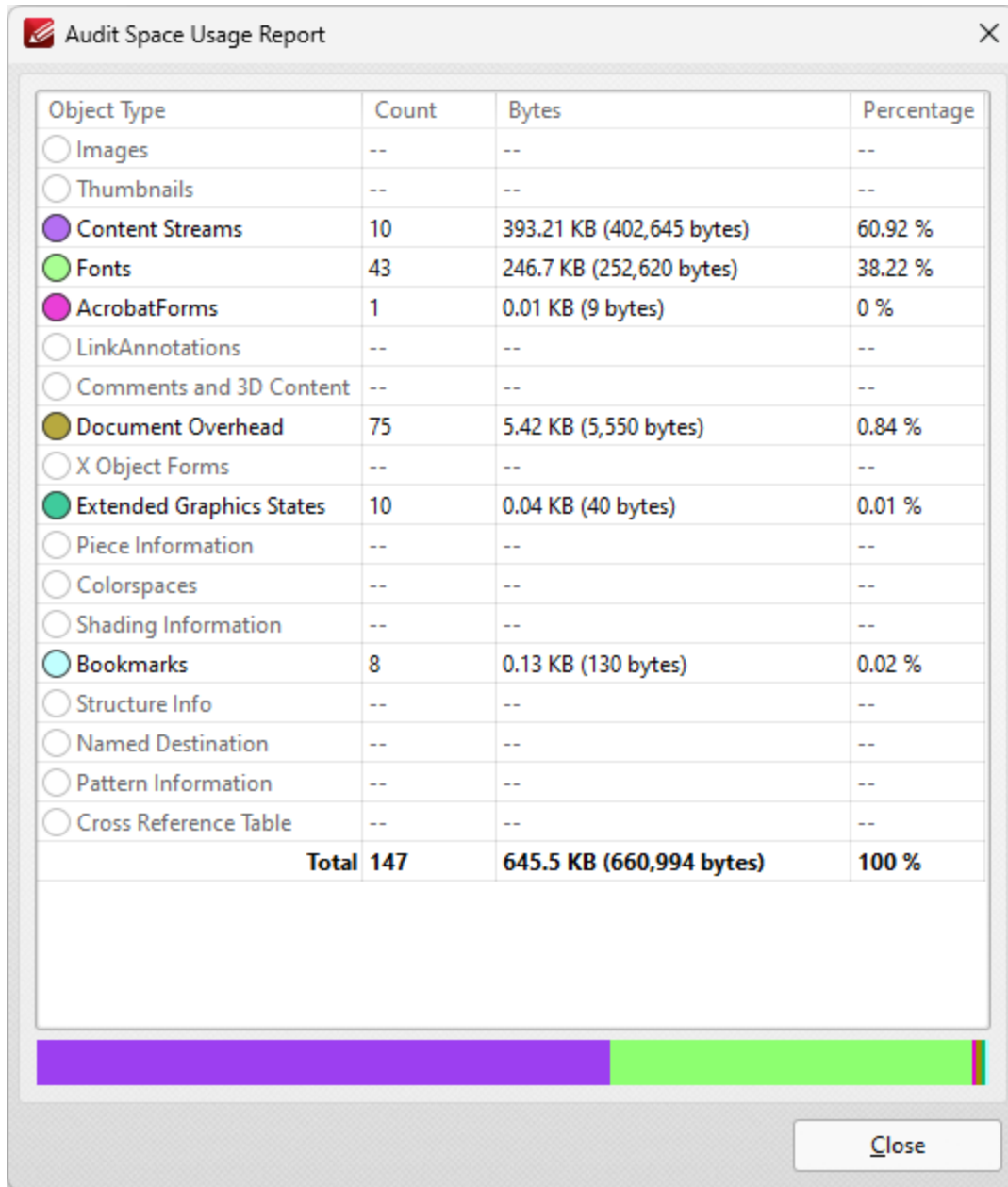
Figure 2. Audit Space Usage Report Pane

5.1.15 **Copy Full File Name**

Copy Full File Name

Click **Copy Full File Name** to copy the full file name of the current document to the clipboard of the local computer:
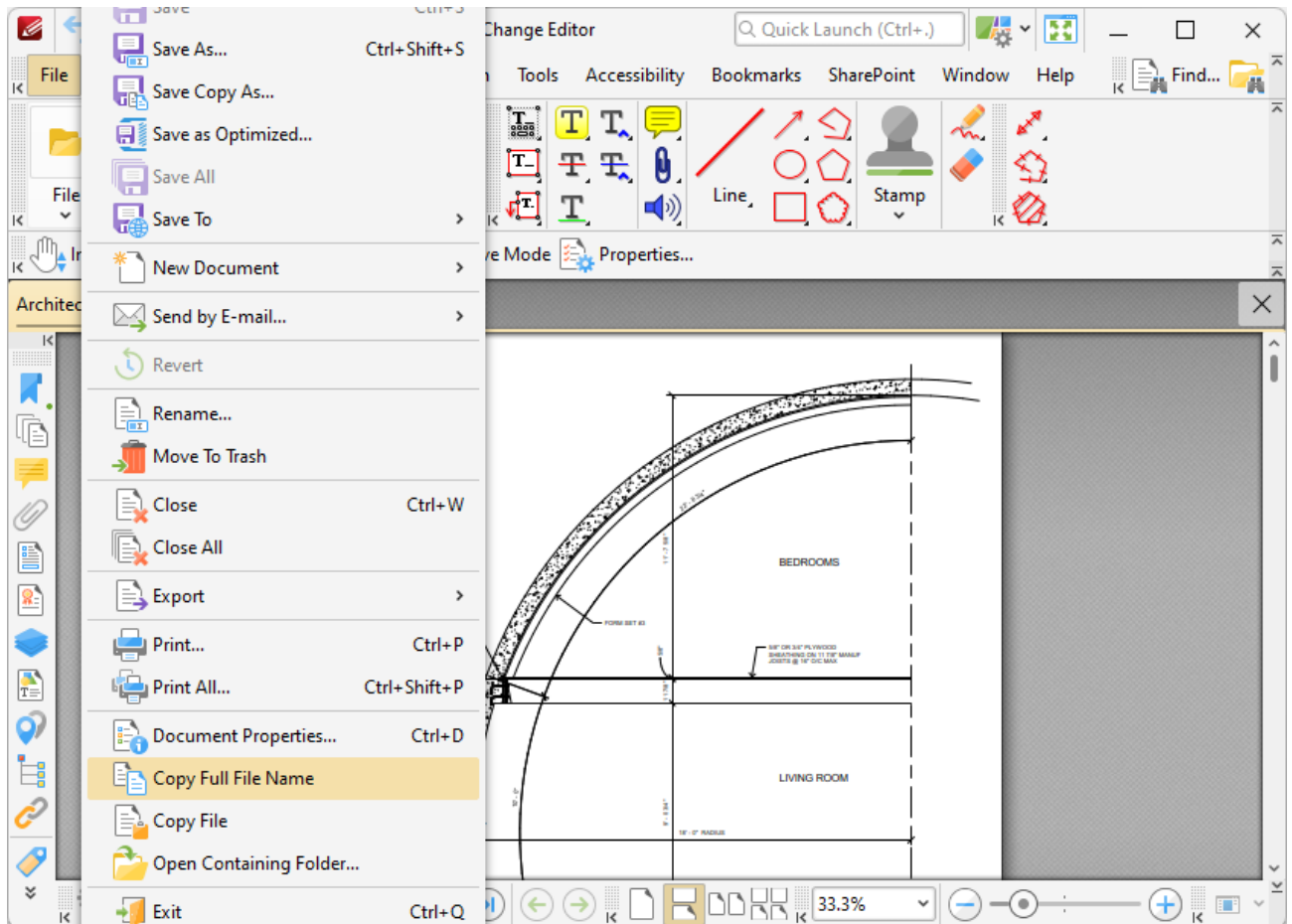
Figure 1. File Tab Submenu, Copy Full File Name

5.1.16   **Copy File**

Copy File

Click **Copy File** to copy the current document to the clipboard of the local computer:
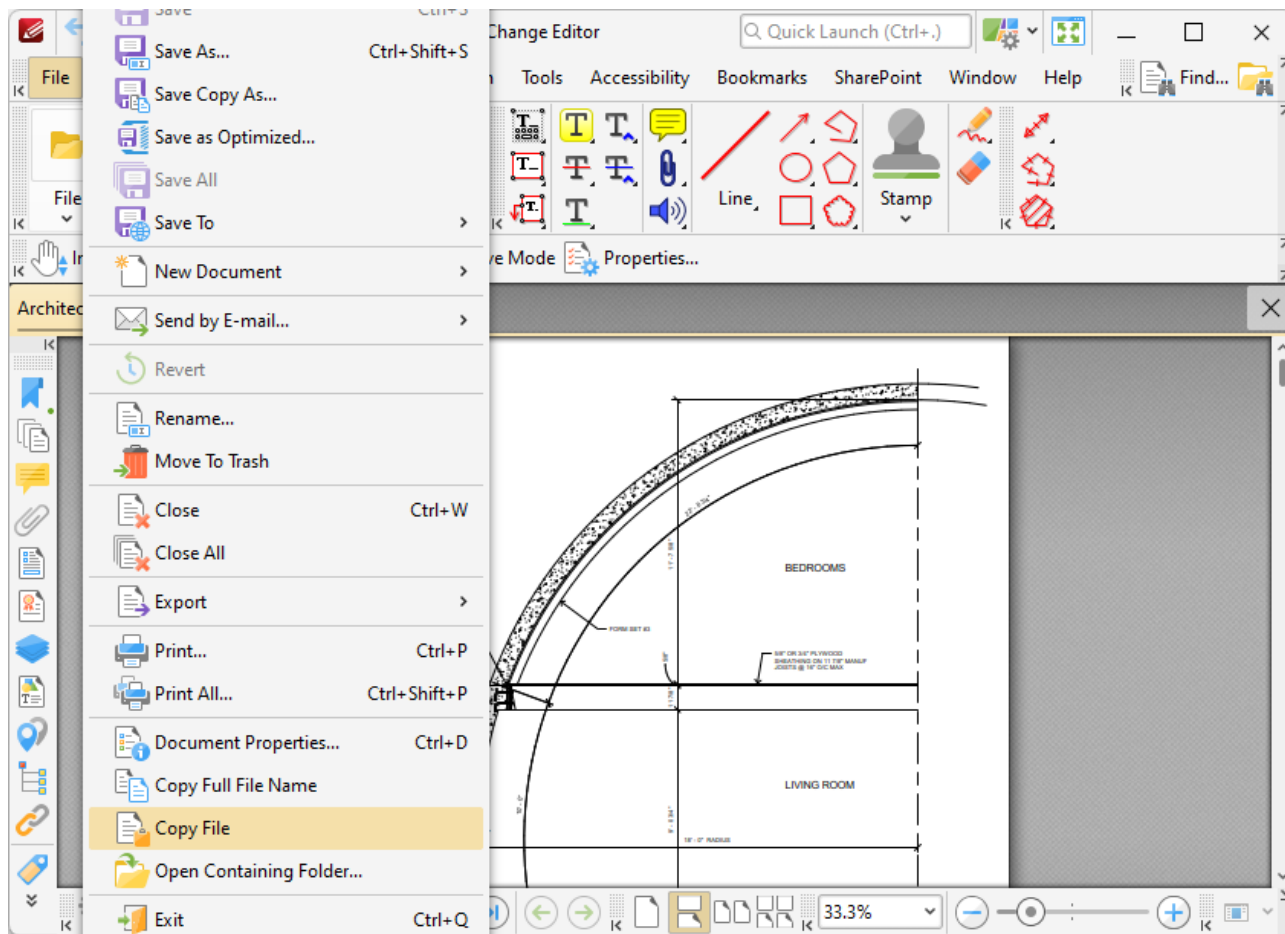
Figure 1. File Tab Submenu, Copy File

5.1.17 **Open Containing Folder**

Open Containing Folder

Click **Open Containing Folder** to open the containing folder of the current document:
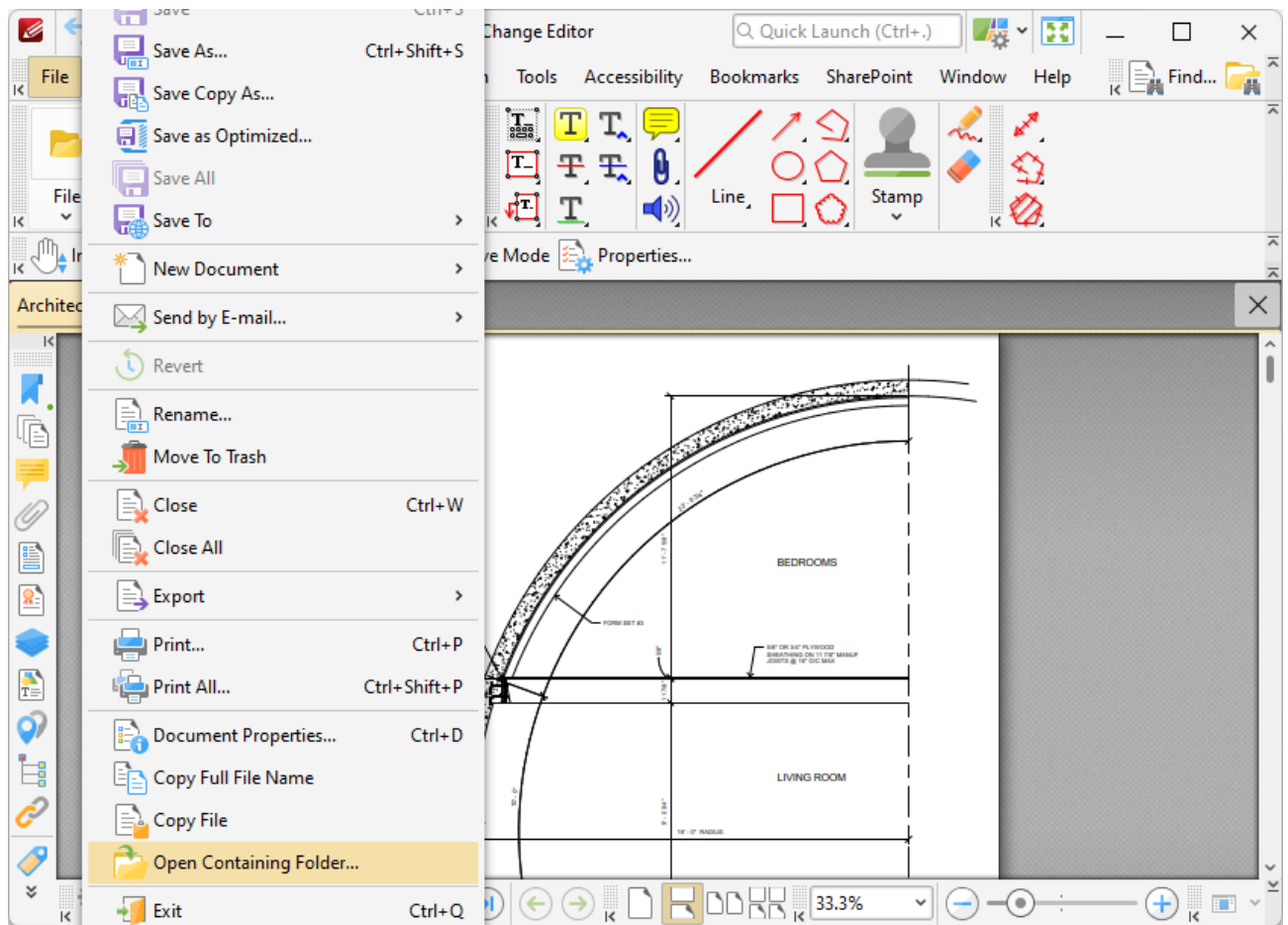
Figure 1. File Tab Submenu, Open Containing Folder

5.2 Edit

Edit

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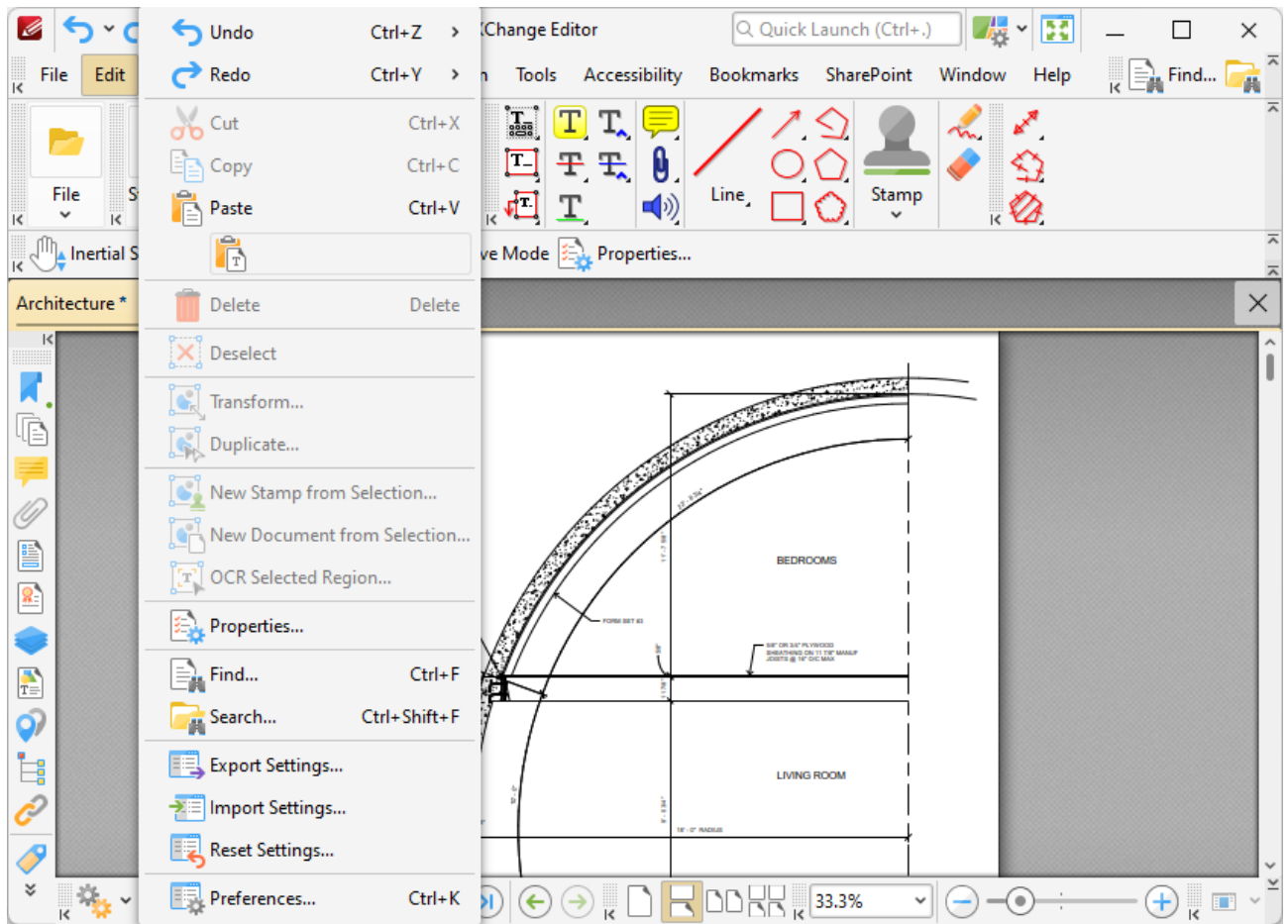
Figure 1. Edit Tab Submenu

These options perform the following operations:

- Click **Undo** to reverse the most recent editing action.
- Click **Redo** to reverse the most recent **Undo.**

- Click **Cut, Copy, Delete** or **Deselect** to cut/copy/delete/deselect selected content.
- Click **Paste** to copy the current clipboard content into the active document. Note that additional paste options are available and depend on the format of the content in the clipboard:
  - **Paste as Plain Text** pastes text as plain text.
  - **Pate as Rich Text** pastes text as rich text.
  - **Paste as Image** pastes content as an image.
  - **Paste as Metafile** pastes content as a metafile.
- Click **Transform** to edit the position, size and/or rotation of selected annotations/content items, as detailed **here** 205.
- Click **Duplicate** to duplicate selected annotations/content items, as detailed **here.** 207
- Click **New Stamp from Selection** to create a new stamp from selected document content, as detailed **here.** 210
- Click **New Document from Selection** to create a new document from selected document content, as detailed **here.** 212
- Click **OCR Selected Region** to perform OCR on selected regions of documents, as detailed **here.** 730
- Click **Properties** to view the properties of document content, as detailed **here.** 213
- Click **Find** to launch the **Find Tool** and find text within documents, as detailed **here.** 215
- Click **Search** to launch the **Search Tool** and search through documents, as detailed **here.** 217
- Click **Export Settings** to export the current program settings to file, as detailed **here.** 222
- Click **Import Settings** to import program settings from file, as detailed **here** 224.
- Click **Reset Settings** to reset program settings, as detailed **here.** 226
- Click **Preferences** to view/edit program preferences, as detailed **here.** 228

5.2.1   Transform

Transform

Click **Transform** to edit the position, size and/or rotation of selected annotations/content items:
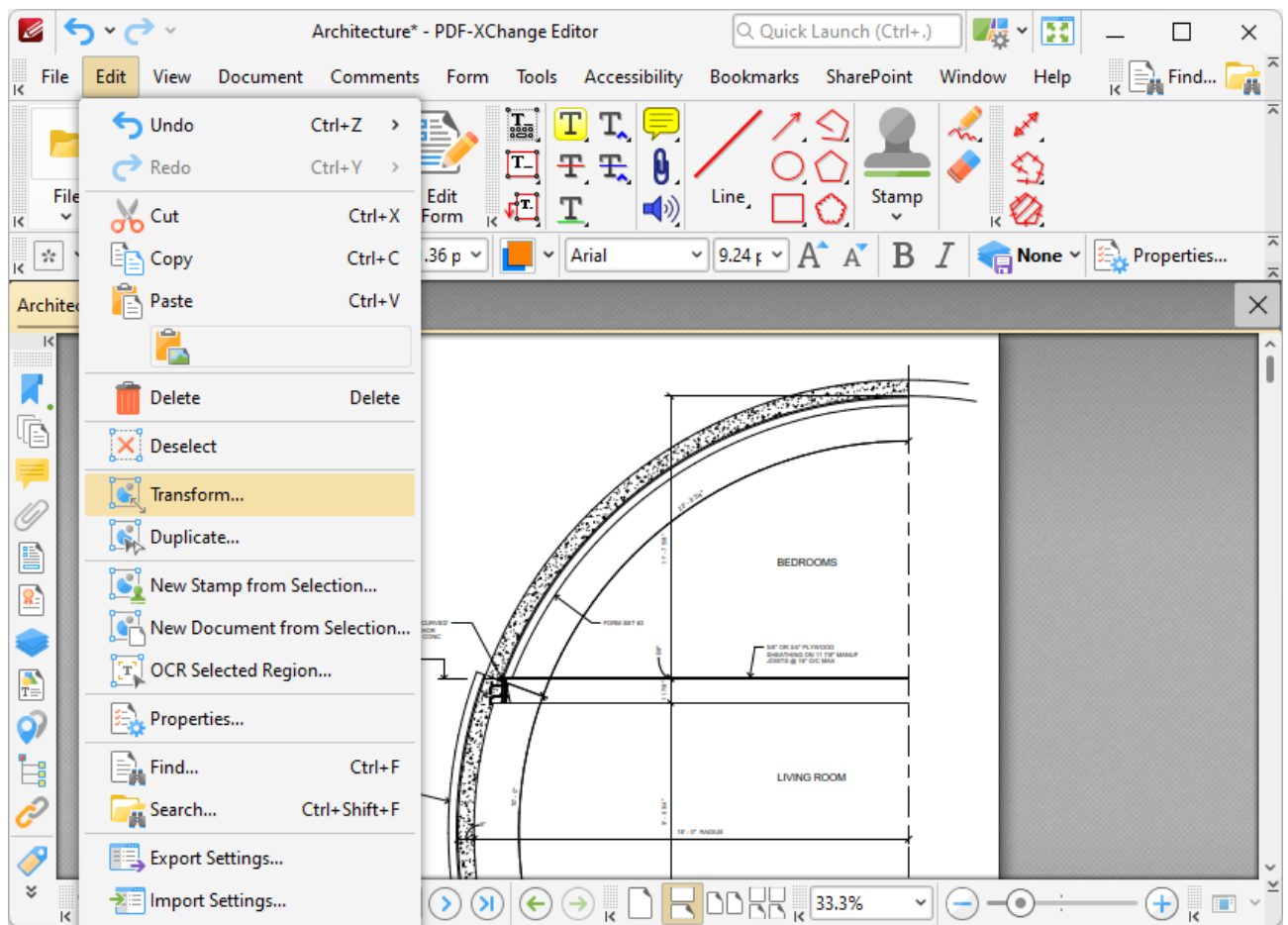
Figure 1. Edit Tab Submenu, Transform

The following dialog box will open:
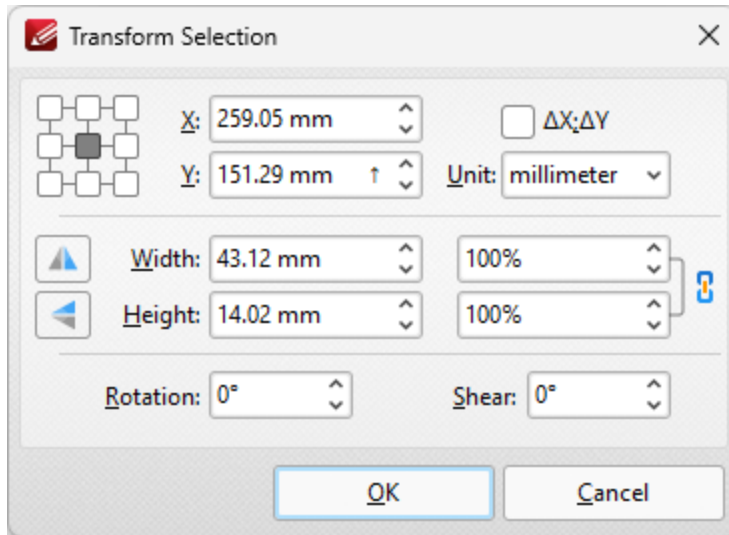
Figure 2. Transform Selection Dialog Box

- Click the boxes in the grid to view the current location of the corresponding points of the selected content.
- Use the **X** and **Y** number boxes to determine the new positioning of the selected content. The **X** value is the horizontal plane and the **Y** value is the vertical plane.
- Click the arrow in the **Y** box to enable/disable the bottom-up Y-axis.
- Select the **ΔX; ΔY** box to determine offset values relative to the current position of the selected content.
- Use the **Unit** dropdown menu to select the units of measurement.
- Use the **Width** and **Height** boxes to adjust the size of the selected content.
- Use the **Rotation** box to adjust the rotation of the selected content.
- Use the **Shear** box to determine a shear angle. This will slant the selected object along a horizontal axis.

Click **OK** to transform selected content.

5.2.2 **Duplicate**

 Duplicate

Click **Duplicate** to duplicate selected annotations/content items:
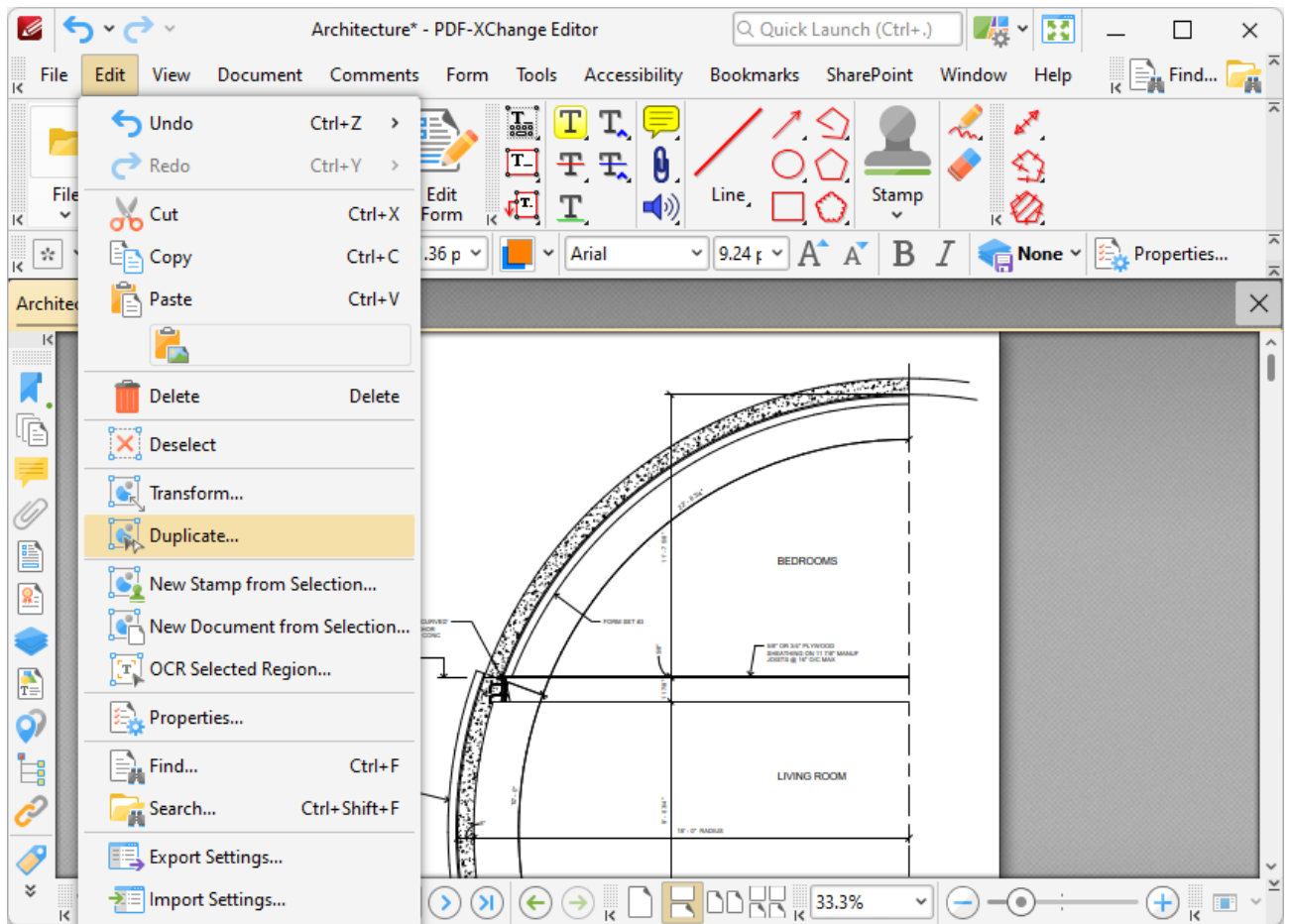
Figure 1. Edit Tab Submenu, Duplicate

The following dialog box will open:
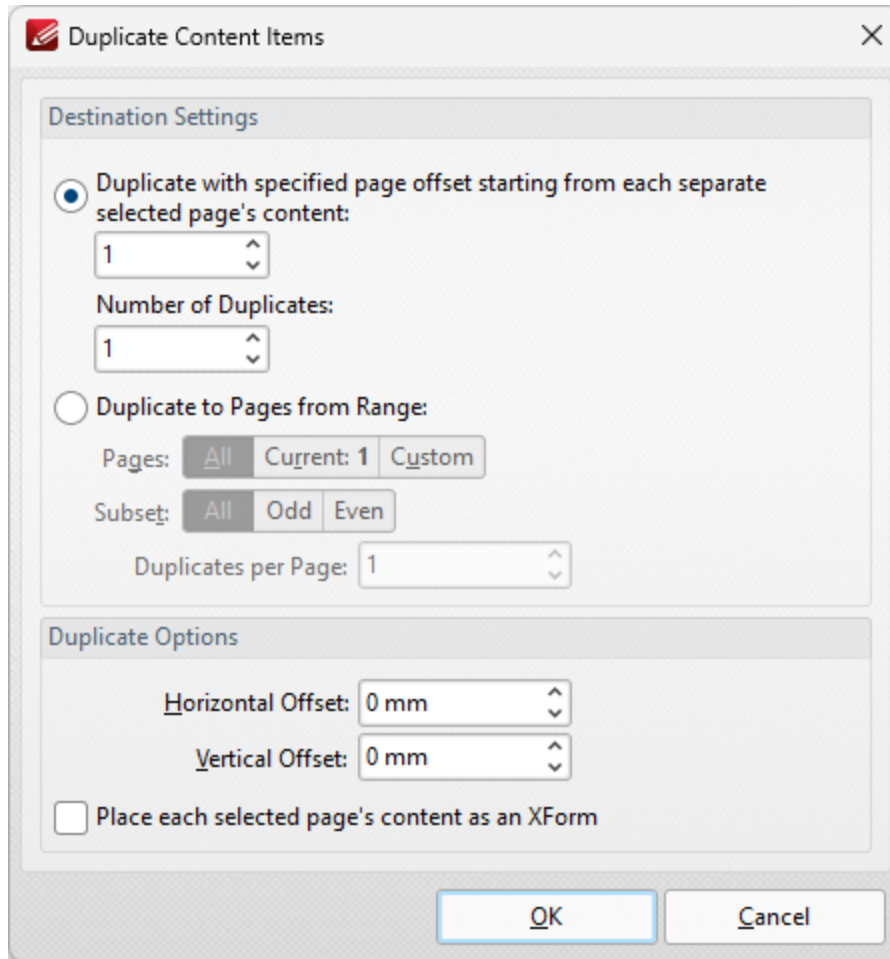
Figure 2. Duplicate Content Items Dialog Box

There are two radio button options:

The first radio button option enables the duplication of selected content items and the creation of a page offset between duplicates. The number entered in the upper number box determines the page offset between the selected content item and duplicates created through the process of duplication. The specified page offset will also be used between duplicates when more than one duplicate is created. Use the lower number box to specify the number of duplicates created.

The second radio button option enables the duplication of selected content items to a specified page range:

- Select **All** to duplicate the selected items to all pages in the document.
- Select **Current Page** to duplicate the selected items to only the current page.
- Use the **Pages** number box to specify a custom page range. The **Subset** dropdown menu can be used to specify **All Pages, Even Pages** or **Odd Pages** as desired. Further information on the specification of page ranges is available **here.** 1274

- Use the **Duplicates per Page** dropdown menu to determine the number of duplicates per page.

Use the **Duplicate Options** settings to determine duplicate parameters:

- Use the **Horizontal Offset** box to determine the horizontal offset in relation to the duplicated content.
- Use the **Vertical Offset box** to determine the vertical offset in relation to the duplicated content.
- Select the **Place each selected page's content as an XForm** box to place duplicated content as an **XForm.**

Click **OK** to duplicate annotations.

5.2.3   New Stamp from Selection

![PDF-XChange Editor logo] **New Stamp from Selection**

Click **New Stamp from Selection** to create a new stamp from selected document content:
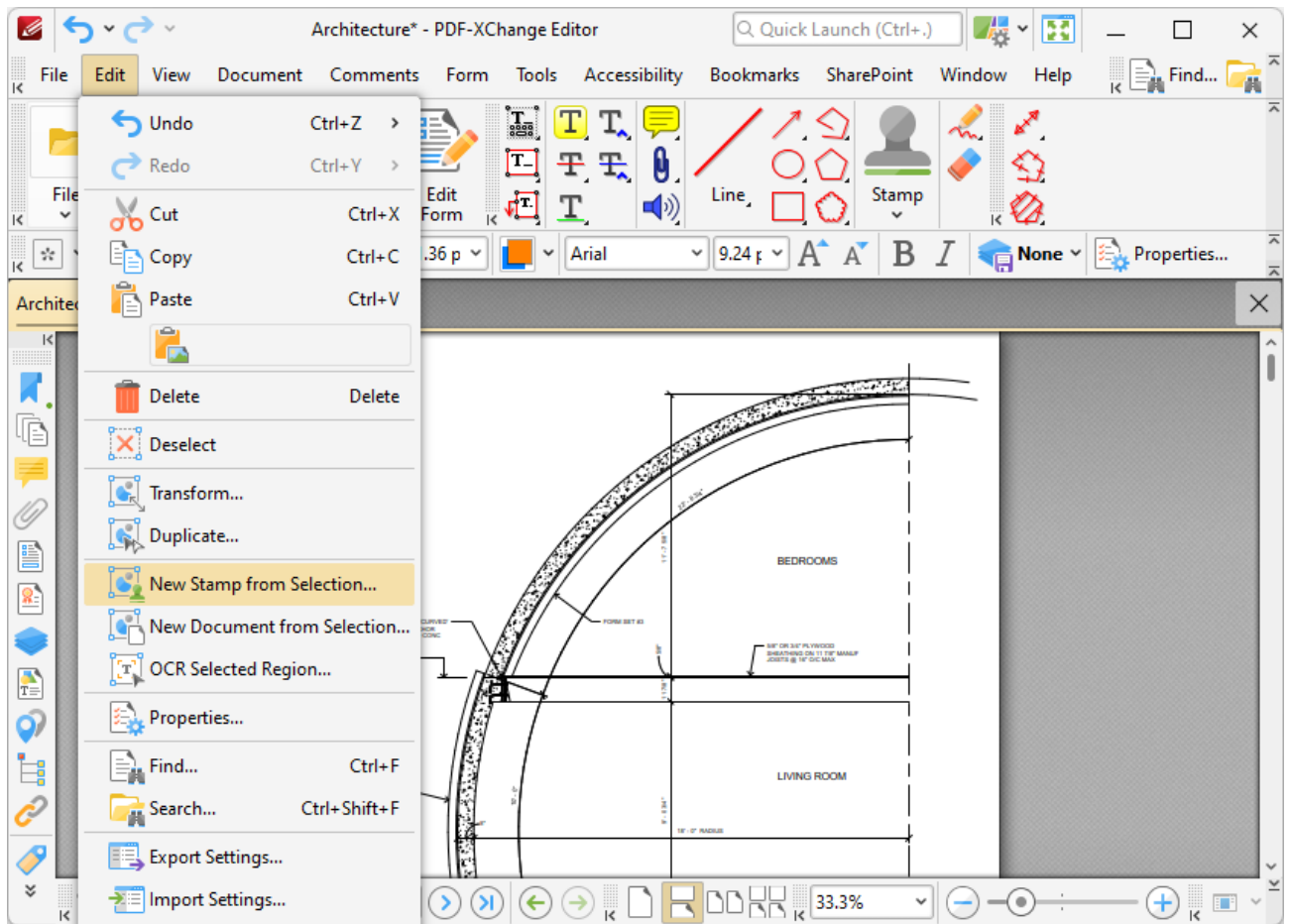
Figure 1. Edit Tab Submenu, New Stamp from Selection

The **Add New Stamp** dialog box will open:
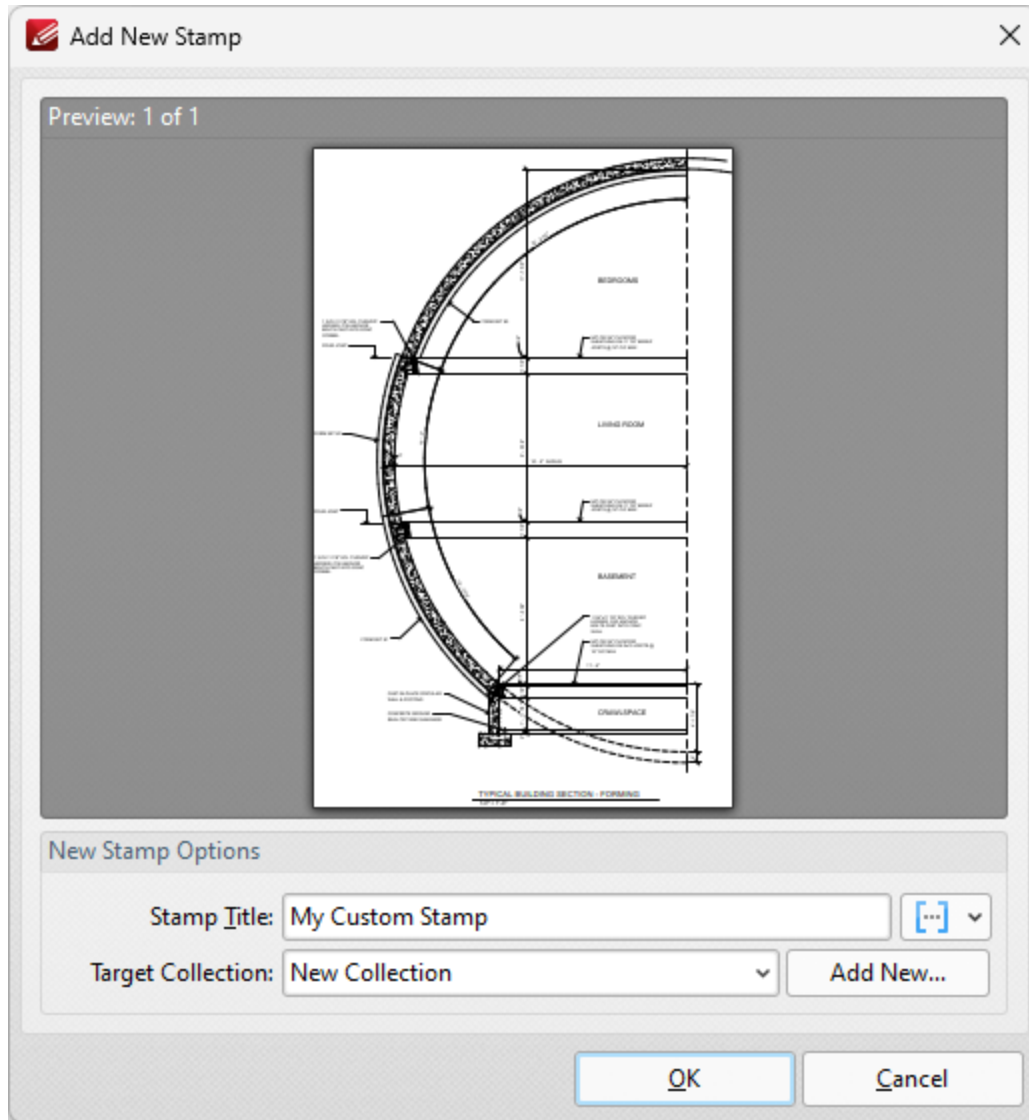
Figure 2. Add New Stamp Dialog Box

- Enter a name for the stamp in the **Stamp Title** text box. Click the blue icon to add **Macros** [1157] as desired.
- Use the **Target Collection** dropdown menu to select the stamp collection in which the new stamp will be located. Click **Add New** to create a new stamp collection.
- Created stamps can be used in conjunction with the **Stamp Tool.** [940]

Click **OK** to create the new stamp.

5.2.4 **New Document from Selection**

 New Document from Selection

Click **New Document from Selection** to create a new document from selected document content:
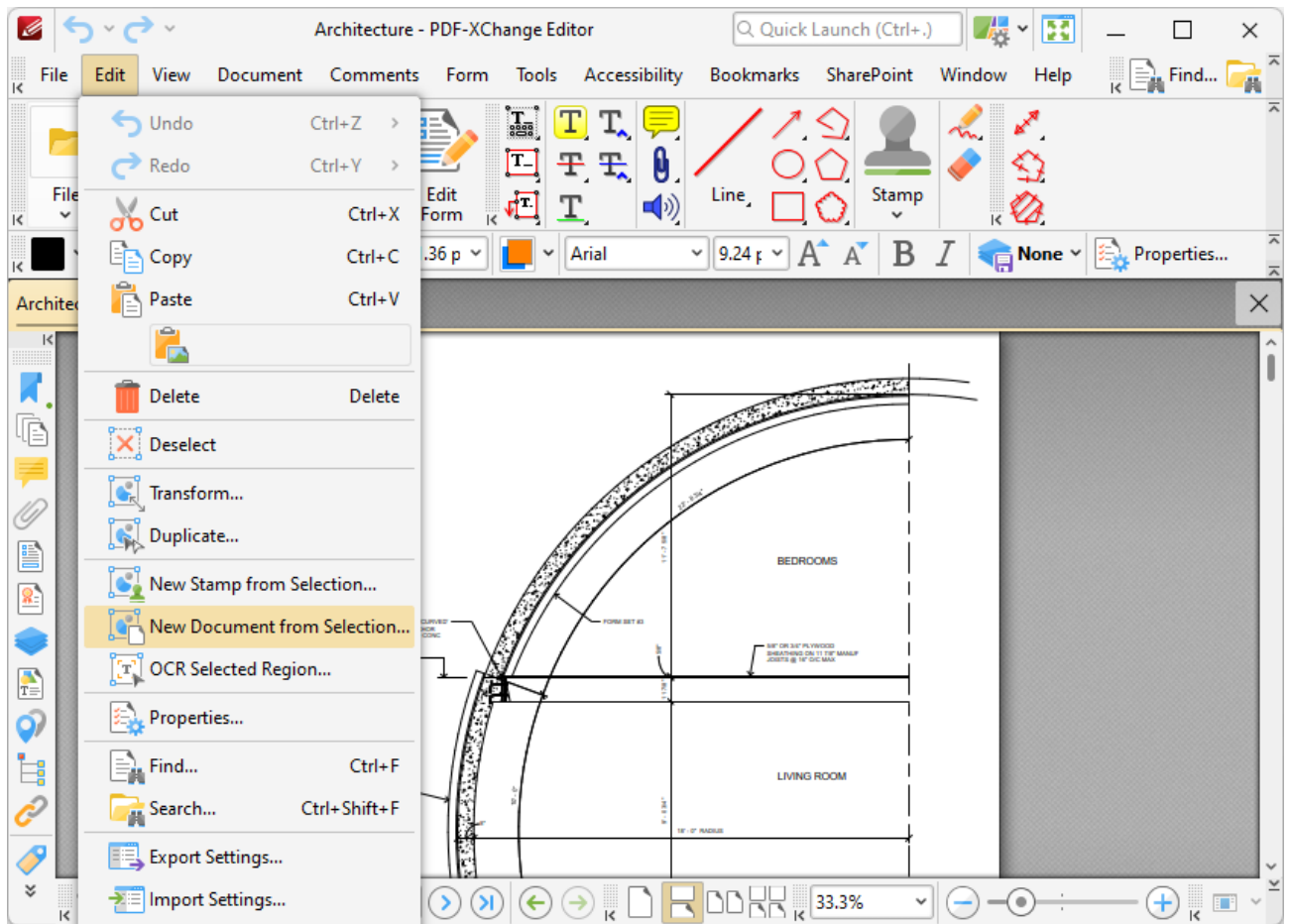
Figure 1. Edit Tab Submenu, New Document from Selection

The new document will be created automatically and then open in a new window in **PDF-XChange Editor.**

5.2.5 **Properties**

Properties

Click **Properties** (or press Ctrl+') to open the **Properties** pane:
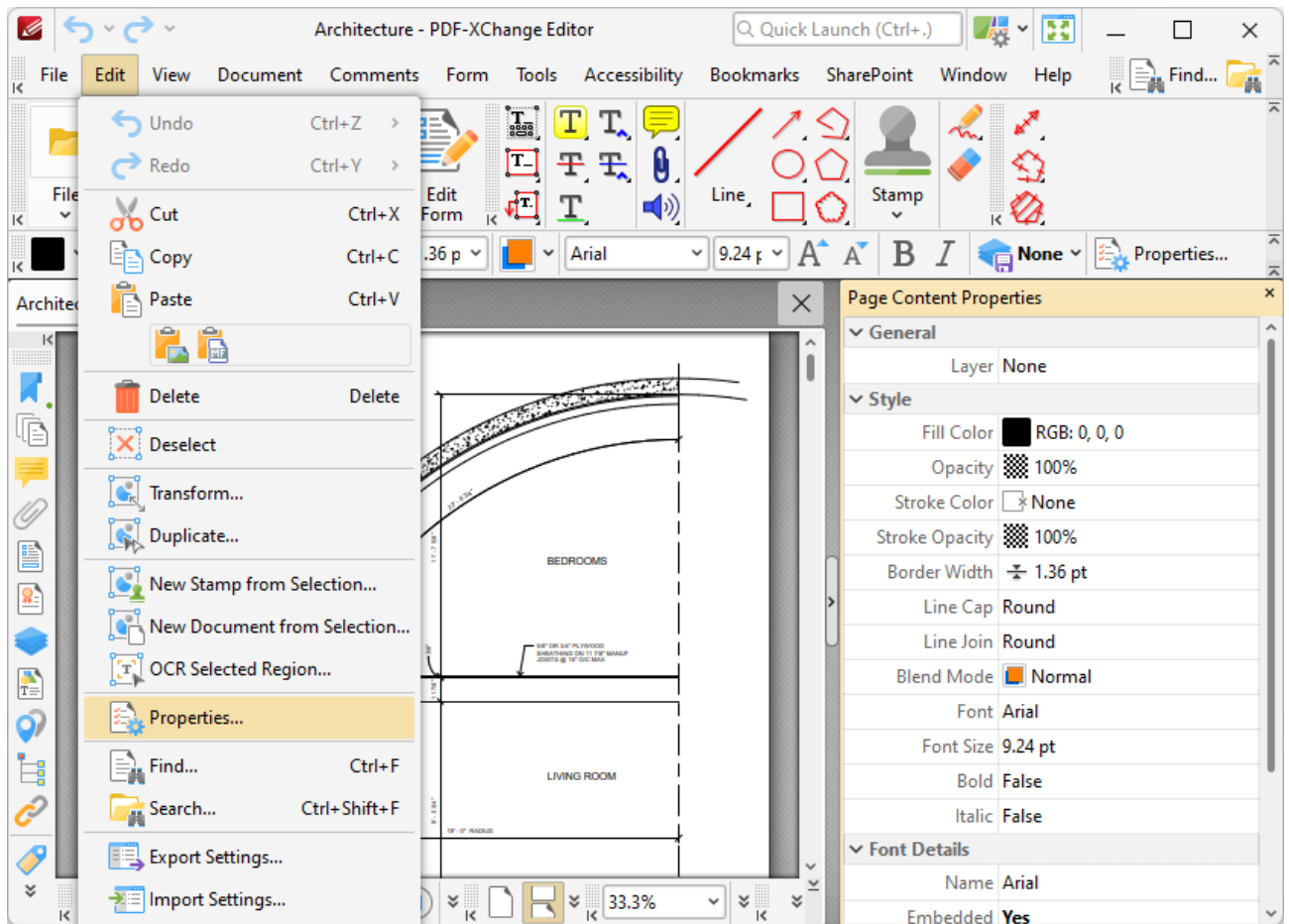
Figure 1. Edit Tab Submenu, Properties

This pane displays the properties of selected document content. Click properties in the **Properties** pane to edit them as desired. (Please note that not all properties can be edited). Alternatively, the **Properties** 485 **Toolbar** 485 can be used to edit most properties. Definitions of tool and comment properties are detailed **here.** 1292

5.2.6 **Find**

Find

Click **Find** (or press Ctrl+F) to launch the **Find** function:
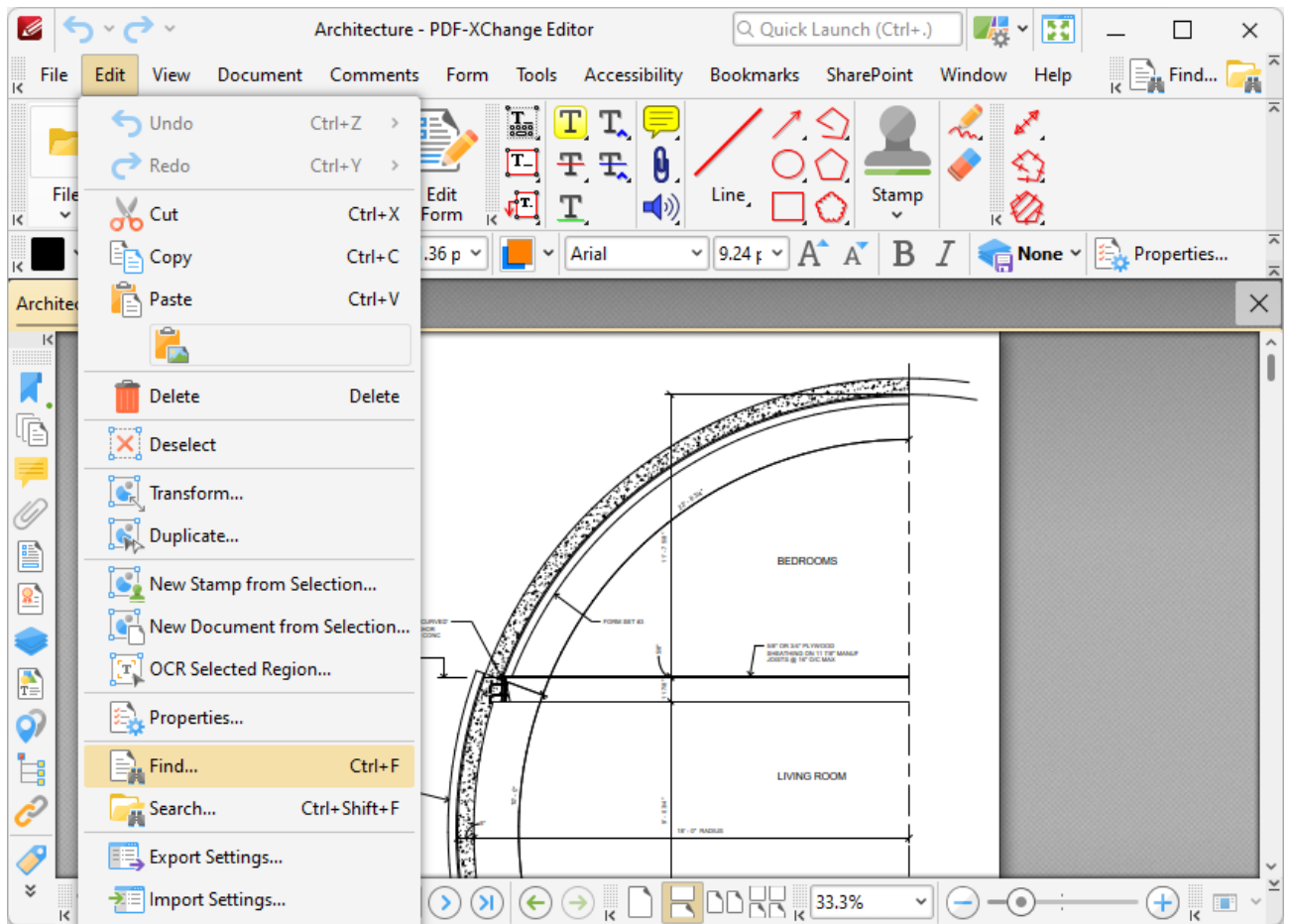
Figure 1. Edit Tab Submenu, Find Function

The **Find** function is used to find specified text in the active document:

Figure 2. 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.
- Use the arrow in the text box to browse previous searches.
- Use the second arrow to customize the parameters and location of searches.
- Use the left and right arrow icons, or press F3/Shift+F3, to move backwards and forwards between search results.

5.2.7   Search

Search

Click **Search** (or press Ctrl+Alt+F) to launch the **Search** pane:
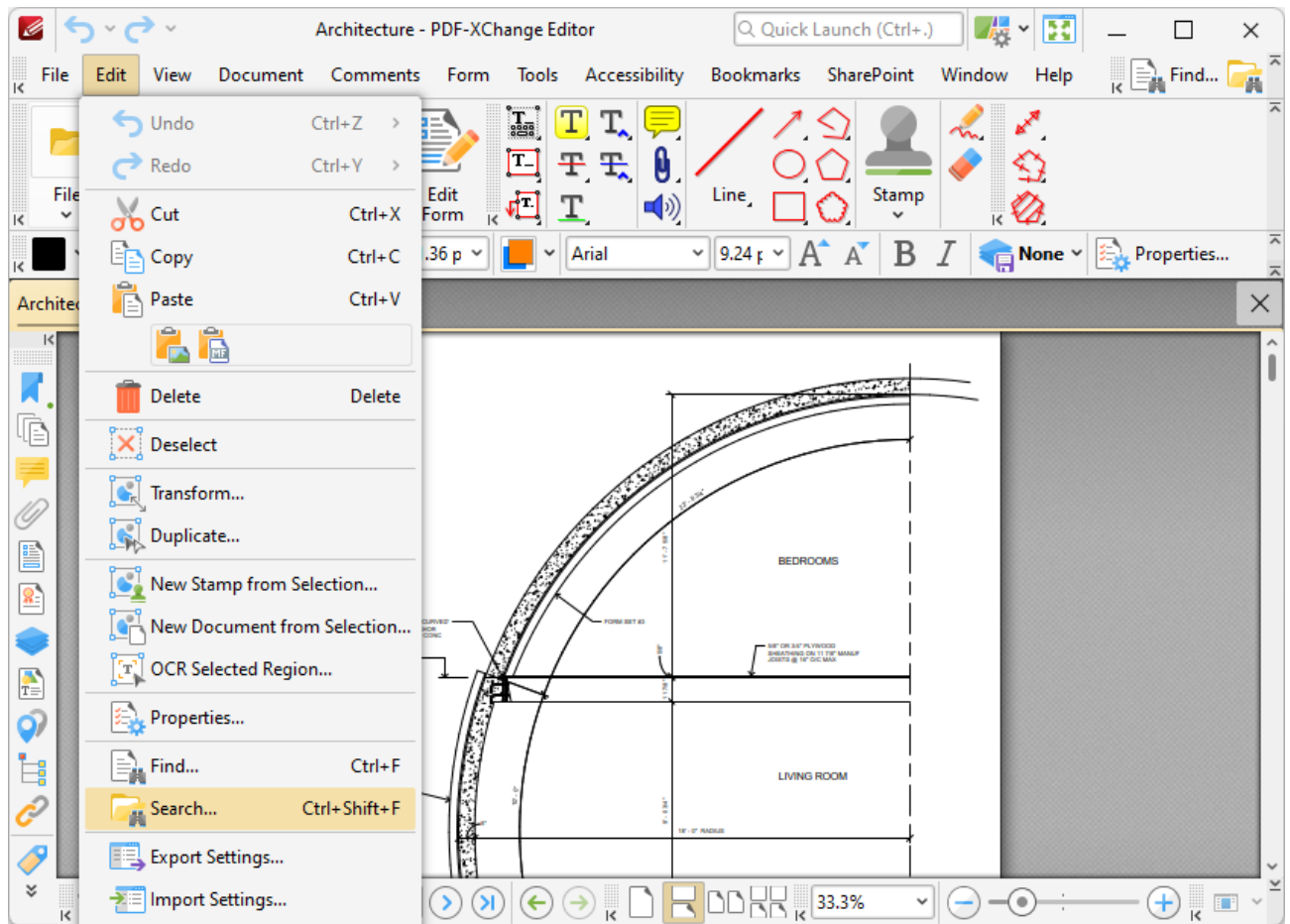
Figure 1. Edit Tab Sumbenu, Search

The **Search** pane is used to search documents open in **PDF-XChange Editor** or folders on the local computer:
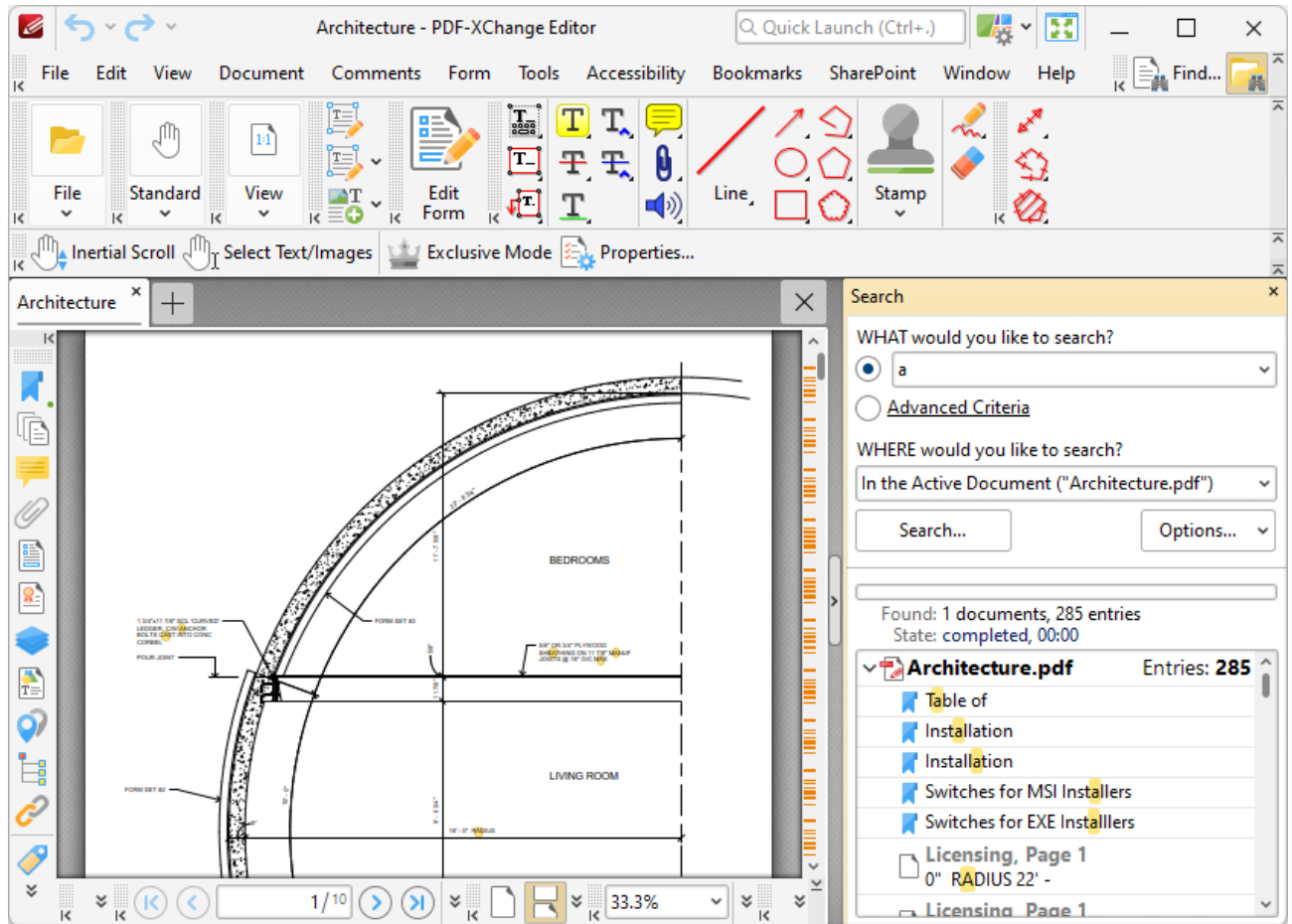
Figure 2. Search Pane

- Enter the search terms in the upper text box or select **Advanced Criteria**, which is explained below.
- Use the lower text box to select where the search will take place:
  - **In the Active Document** searches only the active document.
  - **In All Open Documents** searches all documents currently open in **PDF-XChange Editor.**
  - **In All Documents from this Window** searches all documents open in the current window of **PDF-XChange Editor.**
  - **Browse for Folder** launches the **Select Folder** dialog box. Select the desired folder on the local computer and then click **Select**. The folder will be added to the search location box.
- Click the **Options** button to determine further search variables. These are explained beneath *(figure 4)* below.
- Click the **Search** button to execute the search. The results will be displayed in the lower section of the pane.

When the **Advanced Criteria** option is selected, the following options are displayed:
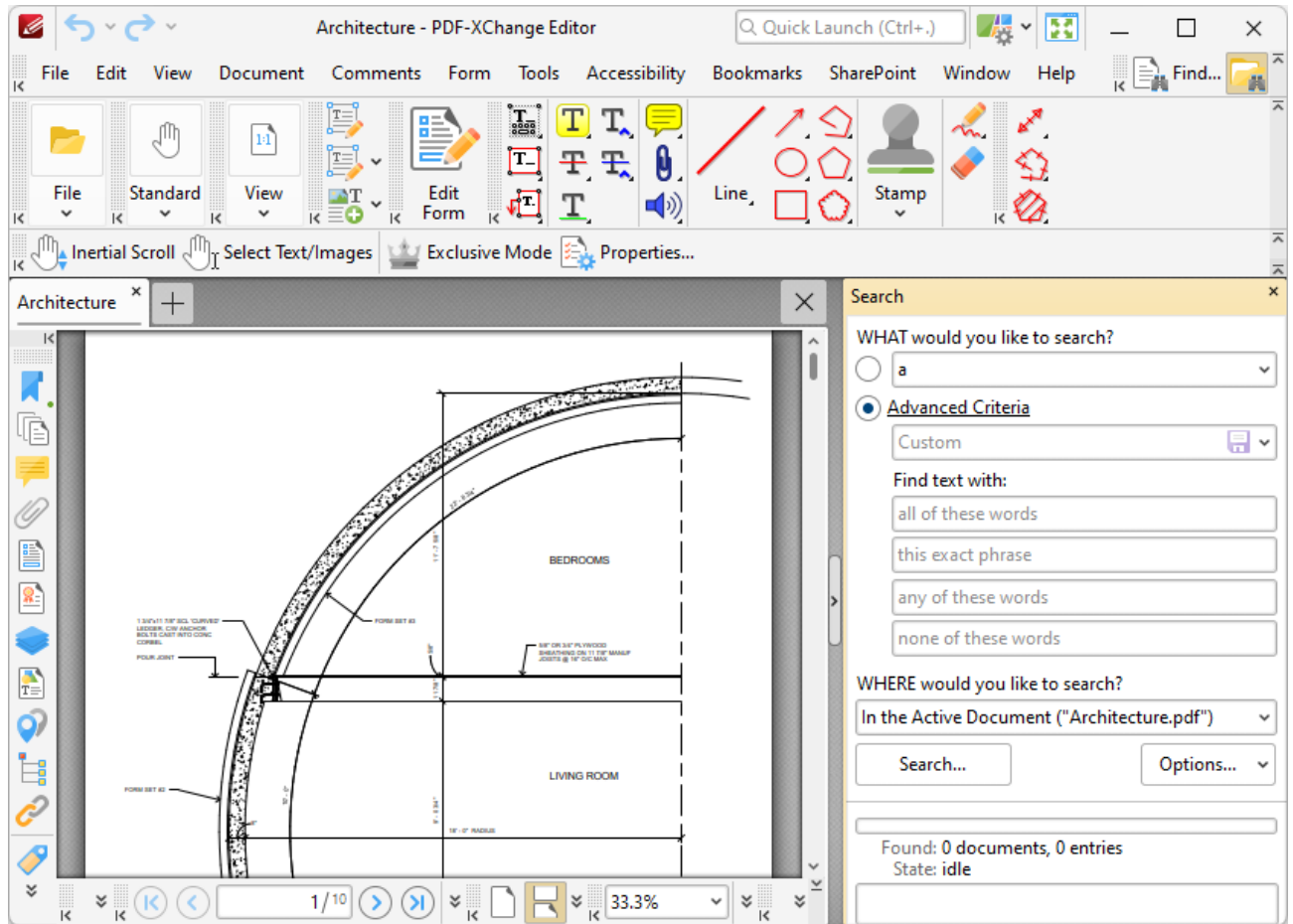
Figure 3. Advanced Criterion Options

- 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 of 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 **this exact phrase** text box, then the results will include only text strings that match the exact phrase entered.
  - 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.
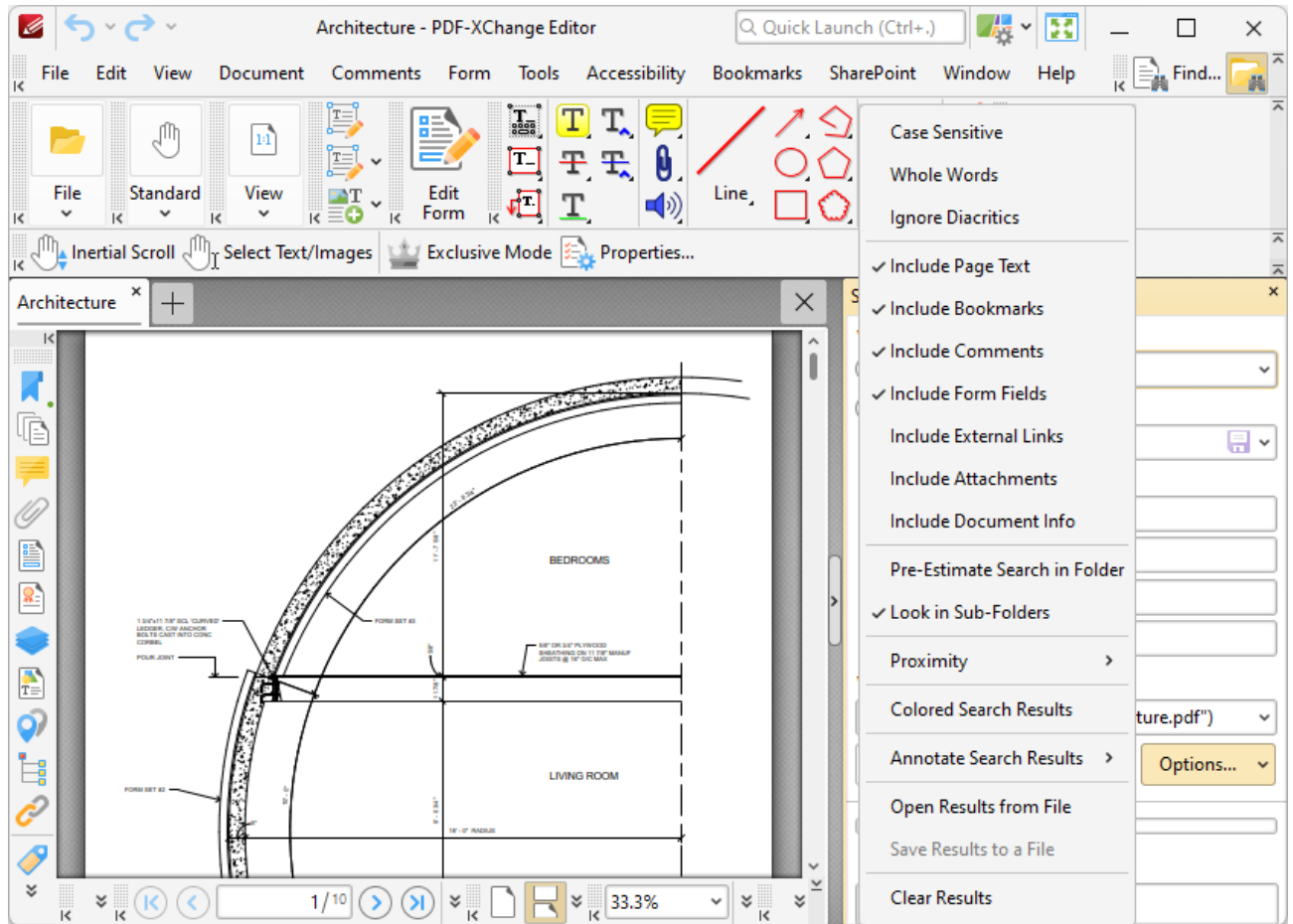
Figure 4. Search Options

- Select **Case Sensitive** to include the case of search terms in the search.
- Select **Whole Words** to return only whole words.
- Select **Ignore Diacritics** to ignore accents, cedillas and other similar symbols in the search.
- Select **Include Page Text** to include text on pages of the document in the search.
- Select **Include Bookmarks** to include bookmark names in the search.
- Select **Include Comments** to include comment text in the search.
- Select **Form Fields** to include form field text in the search.
- Select **Include External Links** to include links to external locations/files in the search.
- Select **Include Attachments** to include embedded documents in the search.
- Select **Include Document Info** to include document metadata/information in the search.
- Select **Pre-Estimate Search in Folder** to have **PDF-XChange Editor** perform a folder count prior to the search. This facilitates exact search progress in the progress bar when searches take place.
- Select **Look in Sub-Folders** to include all directory subfolders in the search.
- Select **Proximity** to determine the proximity of returned results. The options are:
  - **Only Adjacent Words**
  - **Words from the Same Paragraph**
  - **Words from the Same Page**

- **Words from the Same Document**
- Select **Colored Search Results** to highlight matching terms after the search has taken place.
- Click an option in the **Annotate Search Results** submenu to enable annotation options after the search has taken place. The options are:
  - **Highlight Search Results**
  - **Underline Search Results**
  - **Strikeout Search Results**
  - **Redact Search Results**
  - Click **Comment Styles Palette** to launch the **Comment Styles Palette** 791 for further annotation options.
- Click **Open from file** to open a previous search that was saved to file using the option below.
- Click **Save Results** to save the results of the most recent search operation.
- Click **Clear Results** to the clear the search results list.

5.2.8 **Export Settings**

Export Settings

Click **Export Settings** to export the current settings of **PDF-XChange Editor** to a data file:
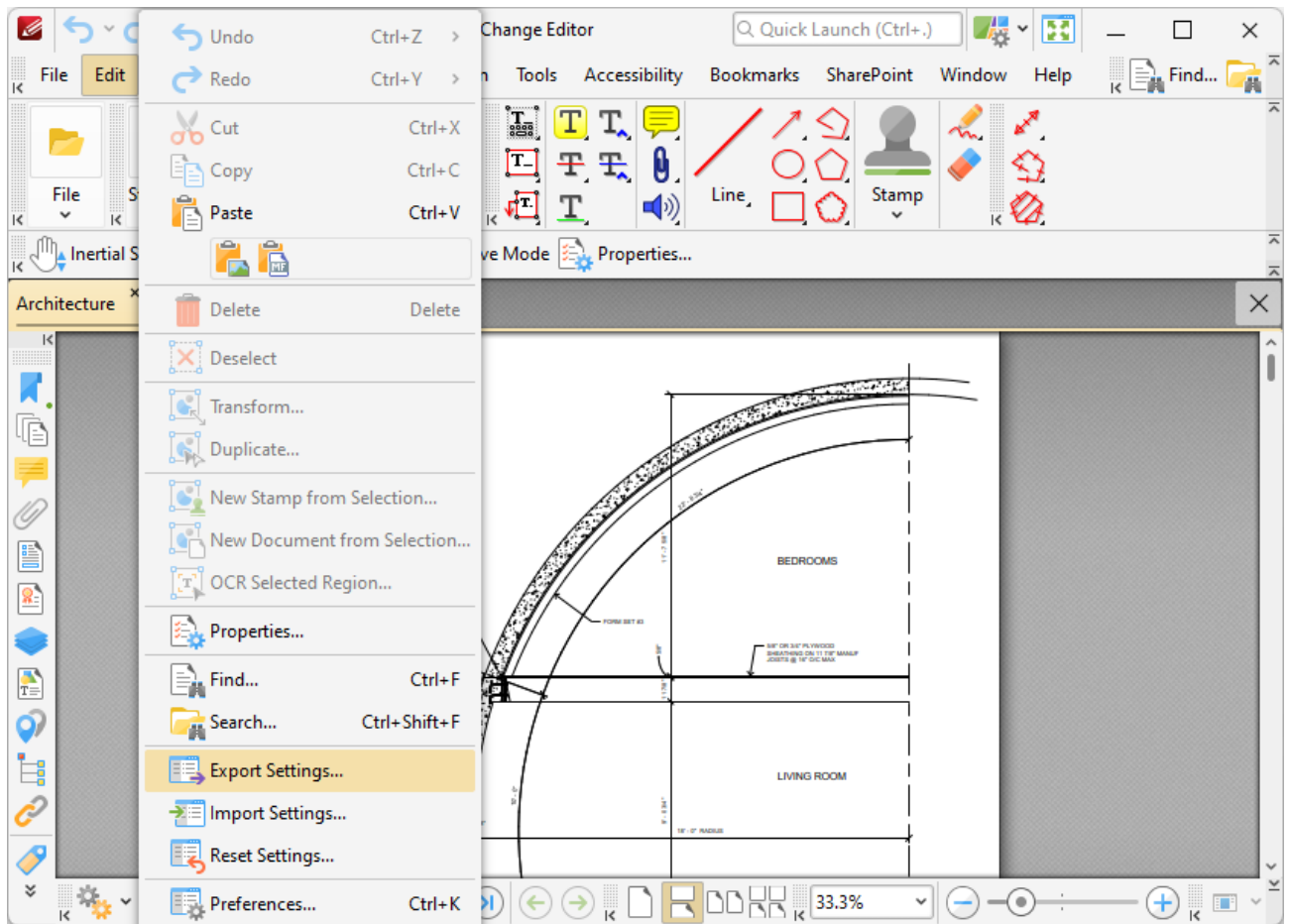
Figure 1. Edit Tab Submenu, Export Settings

The **Export Settings** dialog box will open:
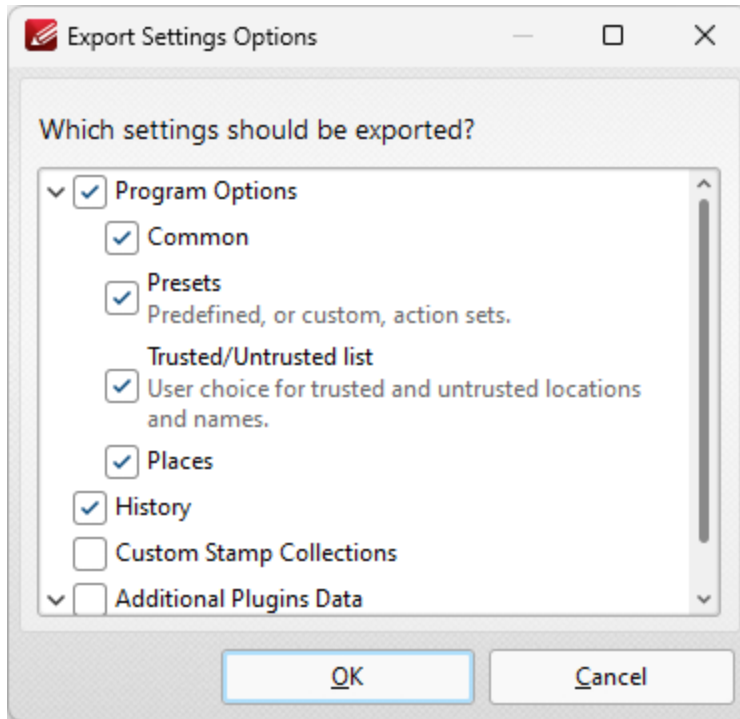
Figure 2. Export Settings Dialog Box

Select the settings to be exported and click **OK** to export.

5.2.9   Import Settings

Import Settings

Click **Import Settings** to import saved settings:
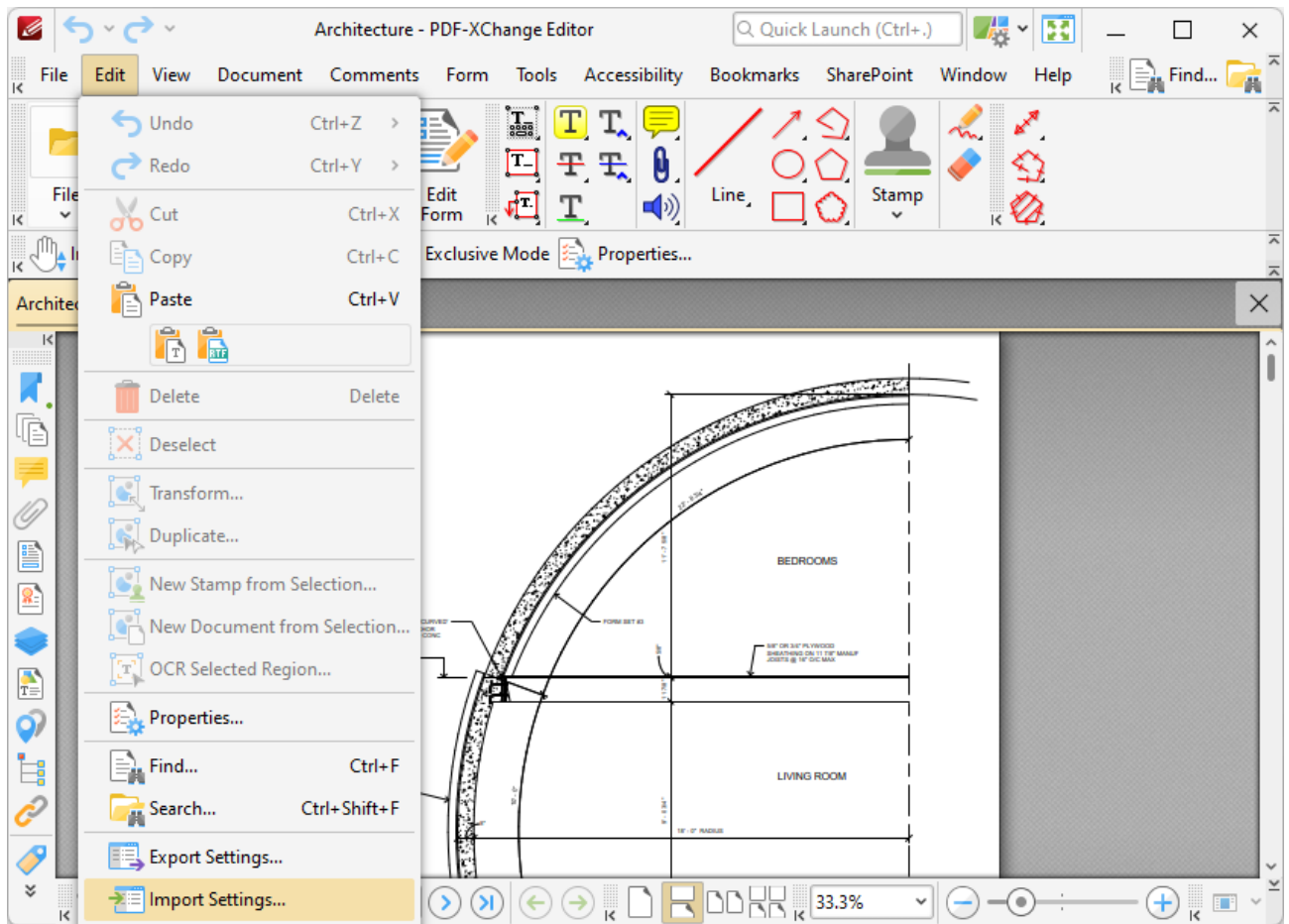
Figure 1. Edit Tab Submenu, Import Settings

The **Import Settings from File** dialog box will open. Select the **PDF-XChange Editor (*.xces)** settings file that you want to import, then click **Open** to import the file. The **Import Settings Options** dialog box will open:
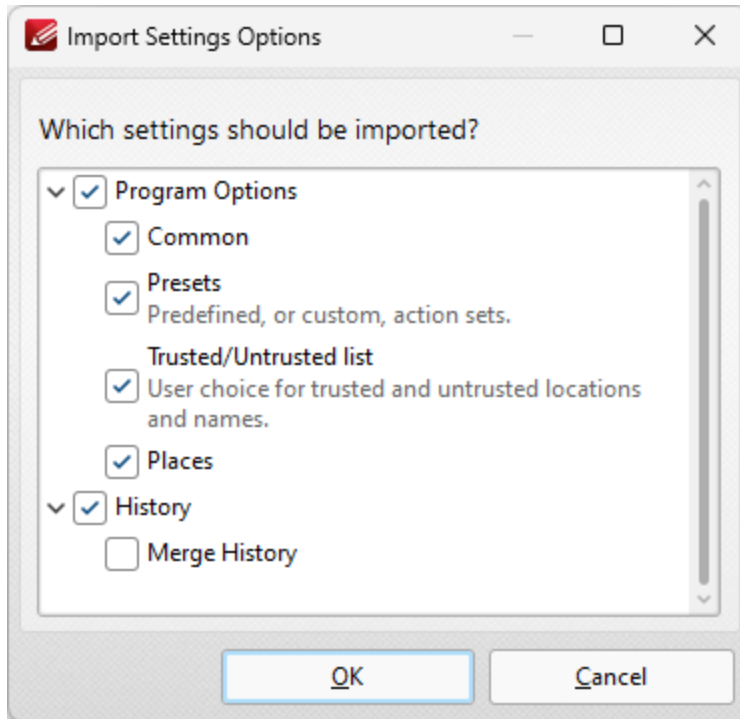
Figure 2. Import Settings Options Dialog Box

Select the desired settings and click **OK** to import.

5.2.10   Reset Settings

Reset Settings

Click **Reset Settings** to revert the current settings of **PDF-XChange Editor** to their default values:
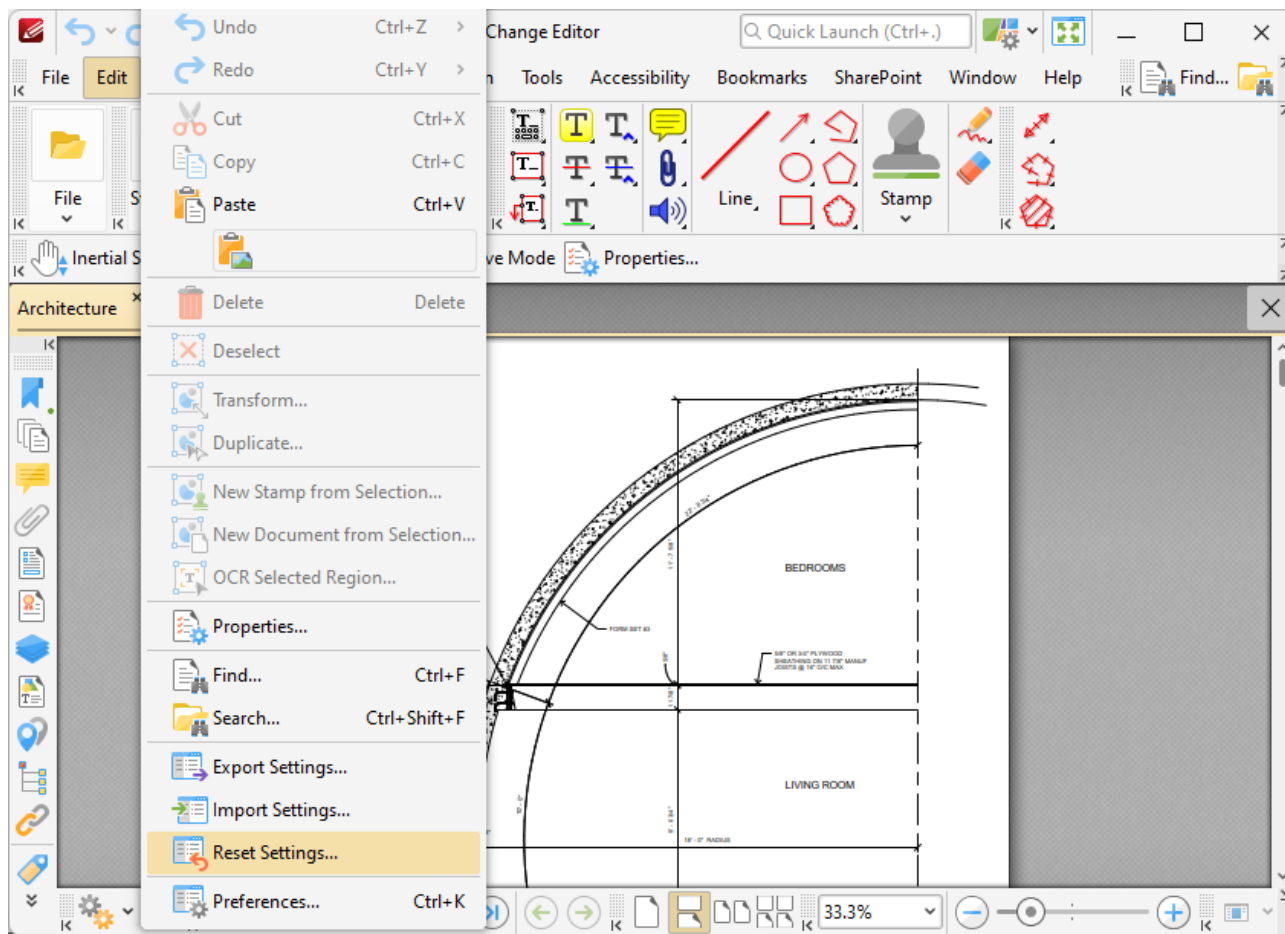
Figure 1. Edit Tab Submenu, Reset Settings
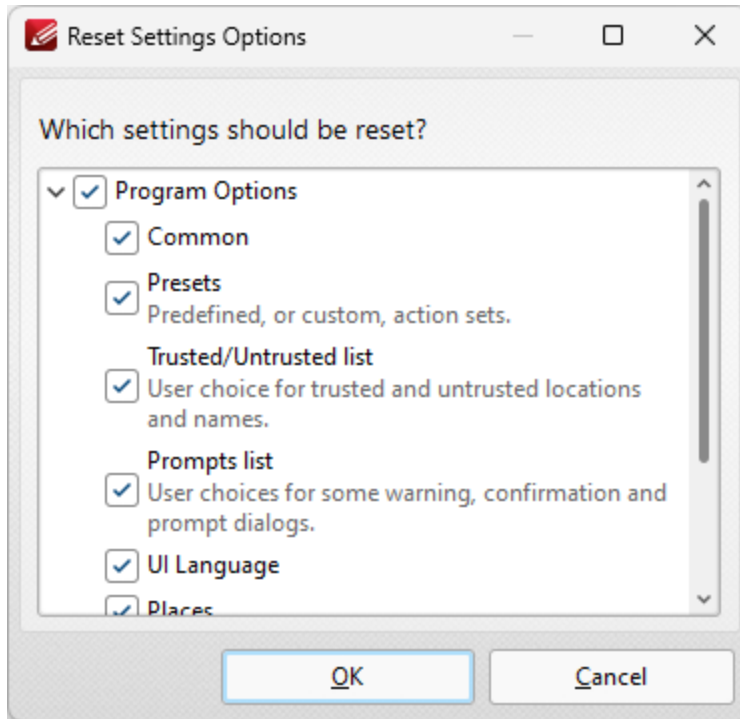
Figure 2. Reset Settings Dialog Box

Select the settings you want to reset and click **OK** to reset.

5.2.11 **Preferences**

Preferences

Click **Preferences** (or press Ctrl+K) to view/edit the **PDF-XChange Editor** preferences:
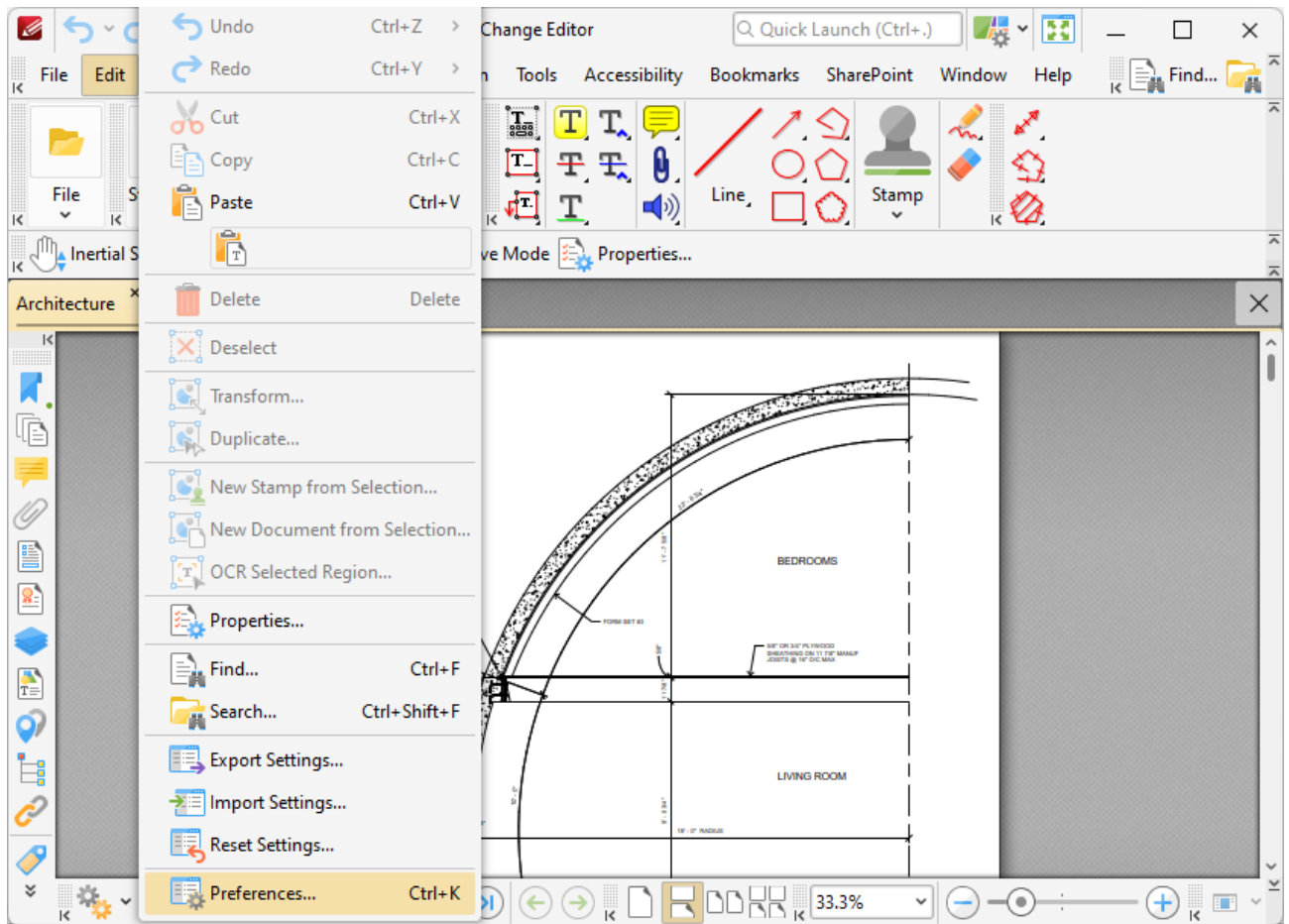
Figure 1. Edit Tab Submenu, Preferences

The **Preferences** dialog box will open:
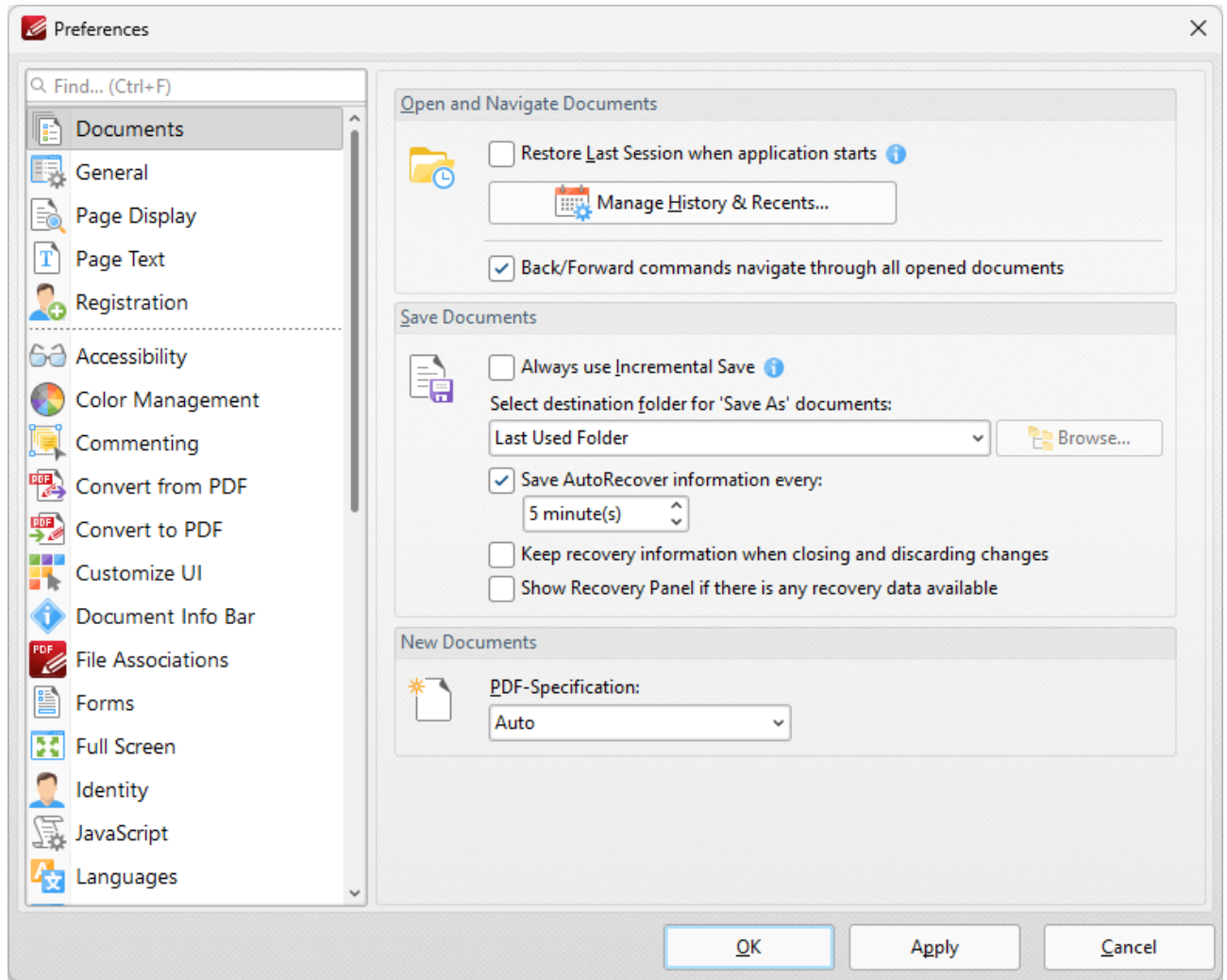
Figure 2. Preferences Dialog Box

You can use the **Find** bar to search the **PDF-XChange Editor** preferences for settings. Click the categories in the pane on the left side to determine the settings of the associated section of the software. Click the links below for further information::

- **Documents** 231
- **General** 234
- **Page Display** 238
- **Page Text** 242
- **Registration** 244
- **Accessibility** 246
- **Color Management** 248
- **Commenting** 250
- **Convert to/from PDF** 252
- **Customize UI** 254
- **Document Info Bar** 256

5.2.11.1 Documents

Documents

When the **Documents** tab is selected the following options are available:
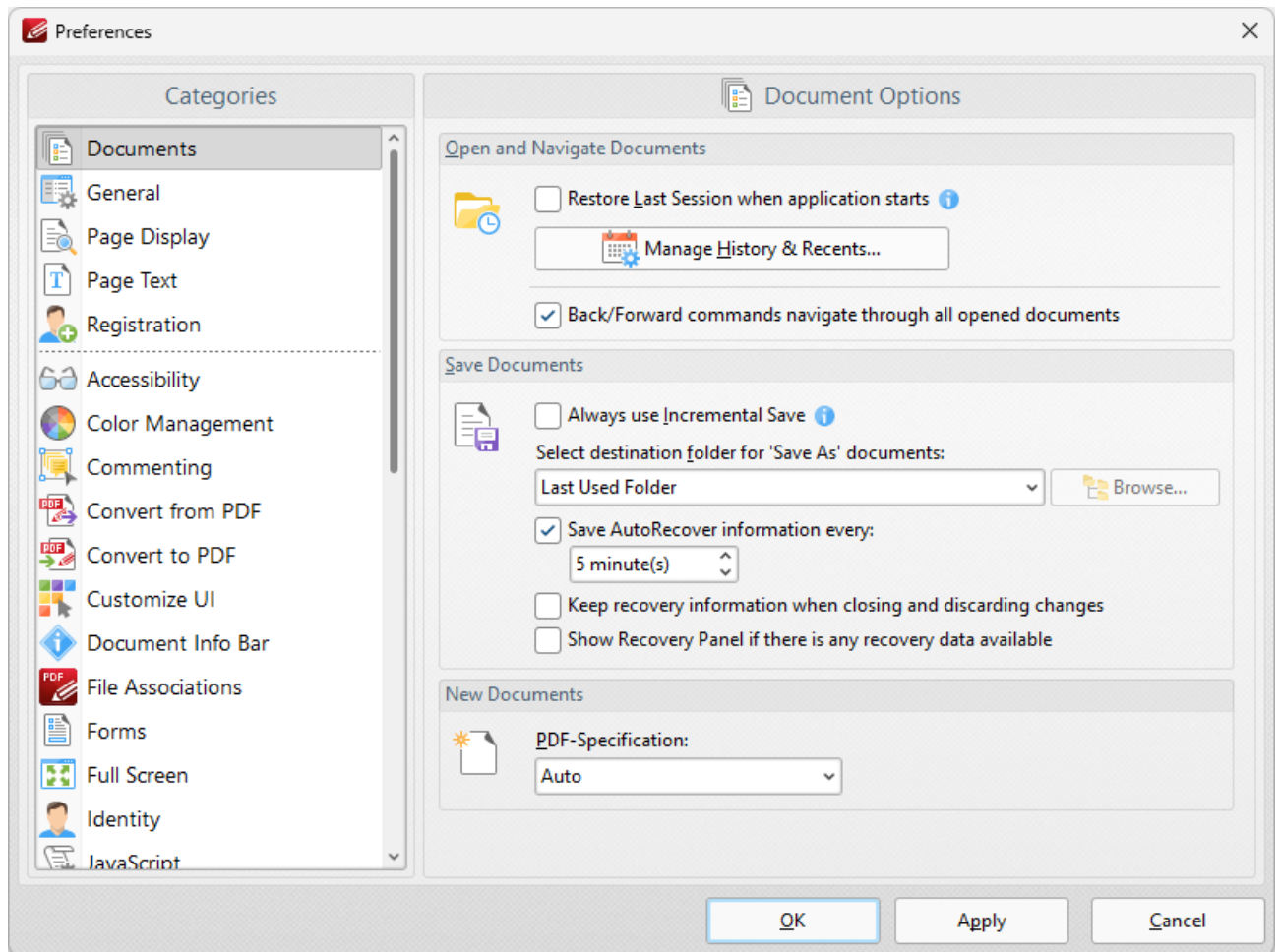
Figure 1. Preferences Dialog Box, Documents Tab Selected

- Select the **Restore Last Session when application starts** box to restore the most recent session when **PDF-XChange Editor** is launched.

- Click **Manage History and Recents** to manage settings for the history of open documents in **PDF-XChange Editor.** The **Manage History and Recents** dialog box will open. See *(figure 2)* below.
- Select the **Back/Forward commands navigate through all opened documents** dialog box to include all open documents when the back/forward navigation commands are used. If this box is not selected then **PDF-XChange Editor** will navigate through the views of only the active document when these commands are used.
- Select the **Always use Incremental Save** dialog box to enable incremental save. **PDF-XChange Editor** will remember the original content of the document when this option is enabled, and will store information about all new changes. This should reduce the amount of time taken to save files, but please note that the size of files will increase each time a save operation is performed.
- Use the **Select destination folder for 'Save As' documents** dropdown menu to determine the folder in which documents are saved when the 'Save As' option is used.
- Select the **'Save Autorecover information every'** box to enable the saving of autorecovery information, which is useful in the event of software crashes or when documents are closed without changes having been saved. Use the number box to determine the interval at which autorecovery information is saved.
- Select the **Keep recovery information when closing and discarding changes** box as desired.
- Select the **Show Recovery Panel if there is any recovery data available** to launch the **Document Recovery Panel** whenever there is recovery data available.
- Use the **PDF-Specification** dropdown menu to determine the PDF specification of documents created in **PDF-XChange Editor.**

Click **Apply** to apply changes and **OK** to save changes.
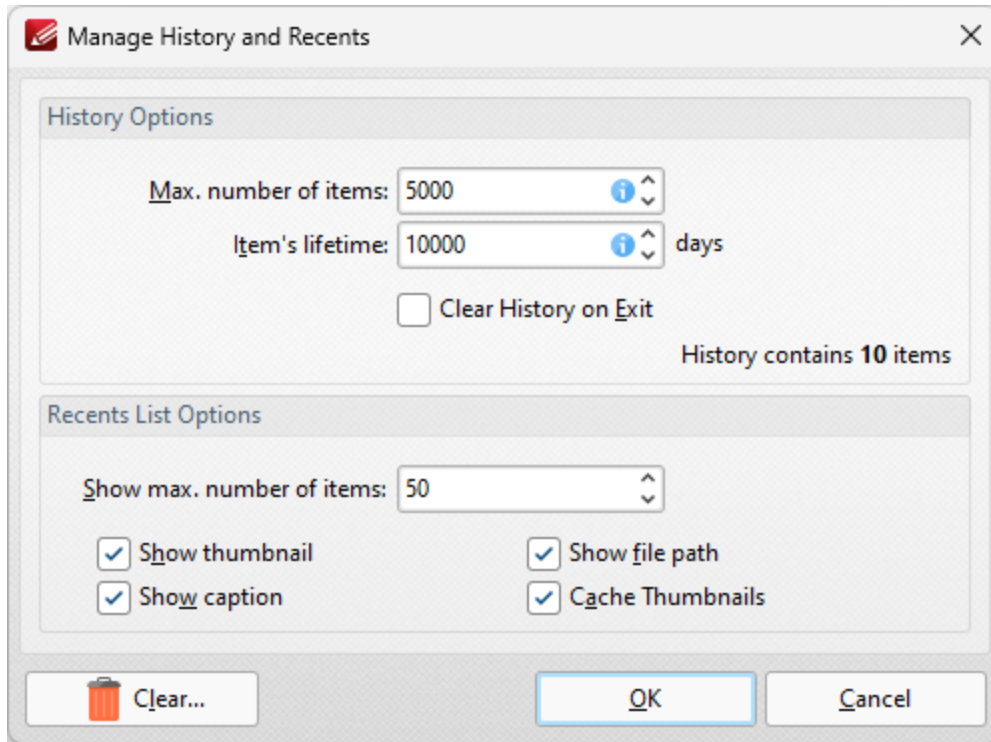
Figure 2. Manage History and Recents Dialog Box

- Use the **Max. number of items** number box to determine the maximum number of files stored in the history of **PDF-XChange Editor.**
- Use the **Item's lifetime** number box to determine the lifetimes of items in the file history list.
- Use the **Show max. number of items** number box to determine the maximum number of items in the **Recents** lists.
- Use the check boxes to determine the elements of files that are displayed in the list.
- Click **Clear** to remove items from the history list.

Click **OK** to save changes.

5.2.11.2 General

PDF **General**

When the **General** tab is selected the following options are available:
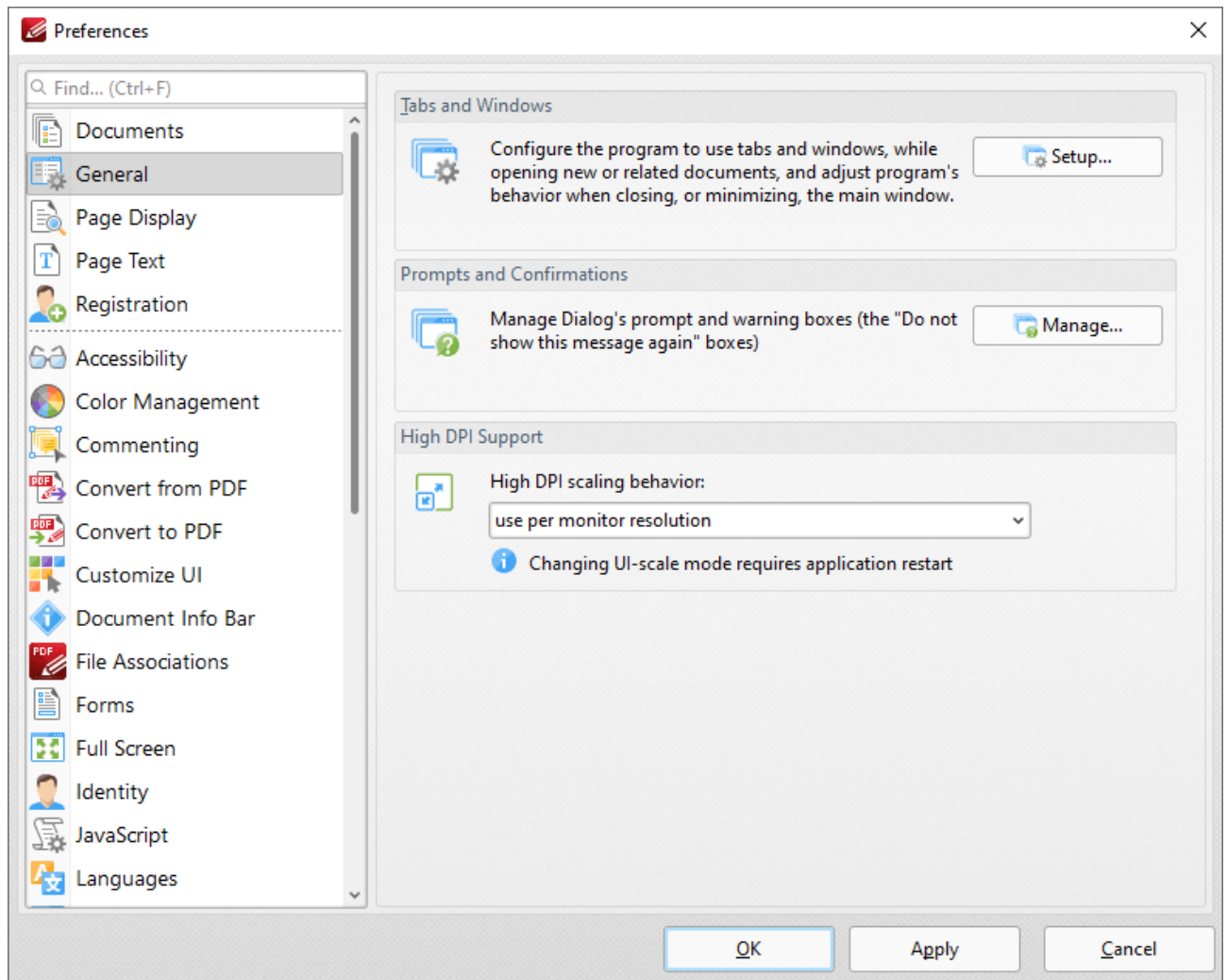
Figure 1. Preferences Dialog Box, General Tab Selected

- Click **Setup** to determine the tabs and windows settings in **PDF-XChange Editor,** as detailed in *(figure 2)* below.

- Click **Manage** to manage the prompts and warning message dialog boxes in **PDF-XChange Editor,** as detailed in *(figure 3)* below.
- Use the **High PDF scaling behavior** dropdown menu to set the UI scale used for monitors when you are switching between screens that have different resolution settings.
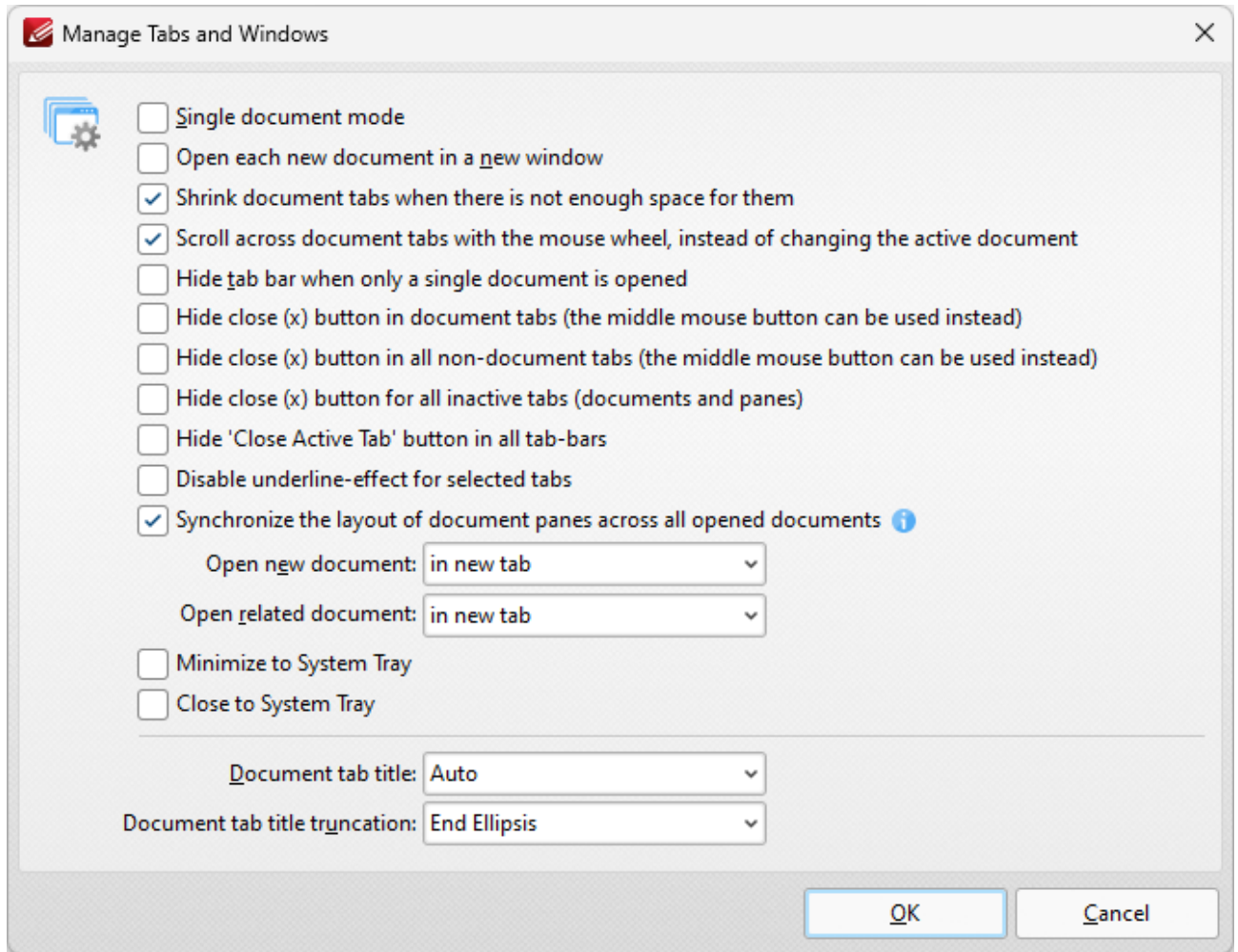
Figure 2. Manage Tabs and Windows Dialog Box

- Select the **Single document mode** box to enable single document mode, which means that only one document can be open at a time.
- Select the **Open each document in a new window** box to open each new document in a new **PDF-XChange Editor** window.
- Select the **Shrink document tabs when there is not enough space for them** box to shrink the size of document tabs when there are multiple tabs open and not enough space to display the names of all open files.
- Select the **Scroll across document tabs with the mouse wheel, instead of changing the active document** box to scroll through document tabs with the mouse wheel instead of having the active document change.

- Select the **Hide tab bar when only a single document is opened** box to hide the tab bar when only one document is open and maximize the workspace area.
- Select the **Hide close (x) button in document tabs** box to hide the close document button in document tabs. Click the mouse wheel to close documents when this option is enabled.
- Select the **Hide close (x) button in all non-document tabs** box to hide the close button in non-document tabs such as the **Thumbnails** and **Bookmarks** panes. Click the mouse wheel to close panes when this option is enabled.
- Select the **Hide close (x) button for all inactive tabs** box to hide the close document button for inactive document tabs.
- Select the **Hide 'Close Active Tab' button in all tab-bars** box to hide the close active tab button for all tabs.
- Select the **Disable underline-effect for selected tabs** box to disable the animated underline that indicates the tab currently selected in the user interface.
- Select the **Synchronize the layout of document panes across all opened documents** box to synchronize the layout of **Editing Panes** 517 for all open documents.
- Use the **Open new document** dropdown menu to determine the tab location at which new documents are opened:
    - Select **in new tab** to open new documents in a new tab on the document toolbar.
    - Select **in new adjacent tab** to open new documents in a new tab adjacent to the tab of the current document in the document toolbar.
- Use the **Open related document** dropdown menu to determine the location at which documents related to the current document, such as attachments and linked documents, are opened:
    - Select **in new tab** to open related documents in a new tab on the document toolbar.
    - Select **in new adjacent tab** to open related documents in a new tab adjacent to the tab of the current document in the document toolbar.
    - Select **in the same tab** to open related documents in the same tab as the current document. Please note that if this option is selected then the current document is closed when related documents are opened.
- Select the **Minimize to System Tray** box to minimize **PDF-XChange Editor** to the system tray when the minimize option is used.
- Select the **Close to System Tray** box to close **PDF-XChange Editor** to the system tray when the close option is used.
- Use the **Document Tab Title** dropdown menu to determine the name of the document as displayed in the tab title:
    - Select **Auto** to allow **PDF-XChange Editor** to select the document tab title automatically.
    - Select **Document Title** to use the document title as defined in the **Document Properties.** 185
    - Select **Document filename** to use the document filename.
- Use the **Document tab title truncation** dropdown menu to determine how document tab titles are truncated in cases where the tab is too narrow to display the whole title.
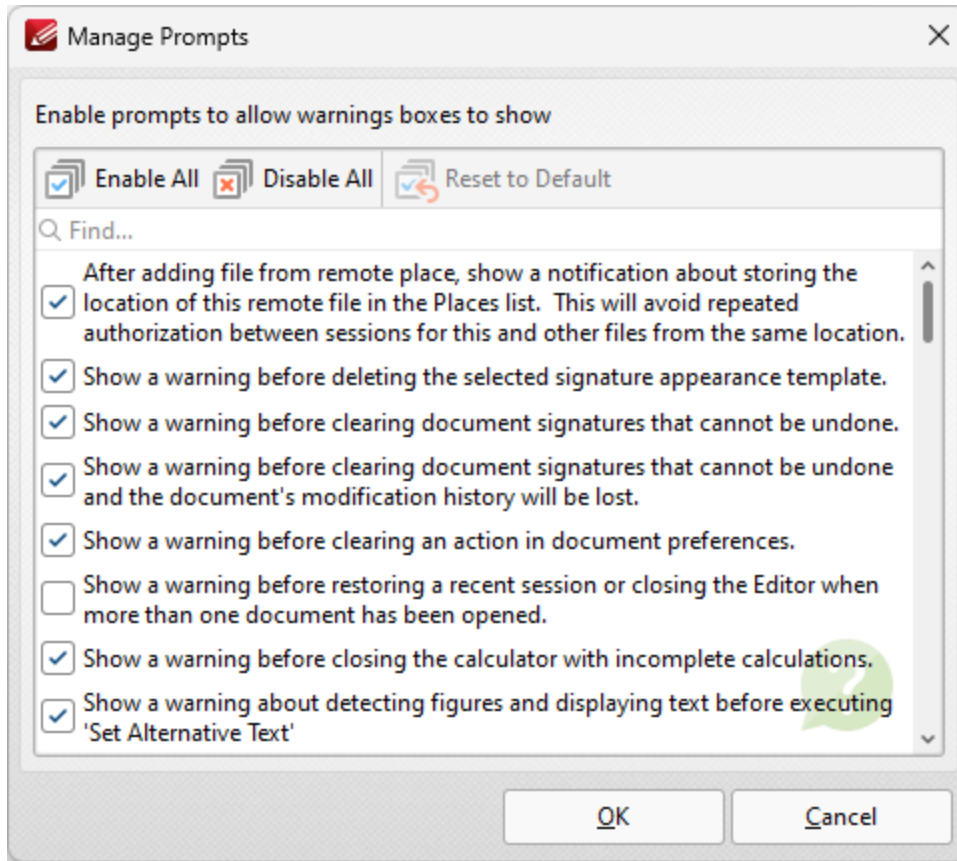
Figure 3. Manage Prompts Dialog Box

- Click **Enable/Disable All** to enable/disable all check boxes in the dialog box.
- Click **Reset to Default the Selected** to reset selected prompts to their default setting.
- Select/clear the boxes of the prompts that you want to show/hide.

Click **OK** to save changes.

5.2.11.3 Page Display

Page Display

When the **Page Display** tab is selected the following dialog box is displayed:
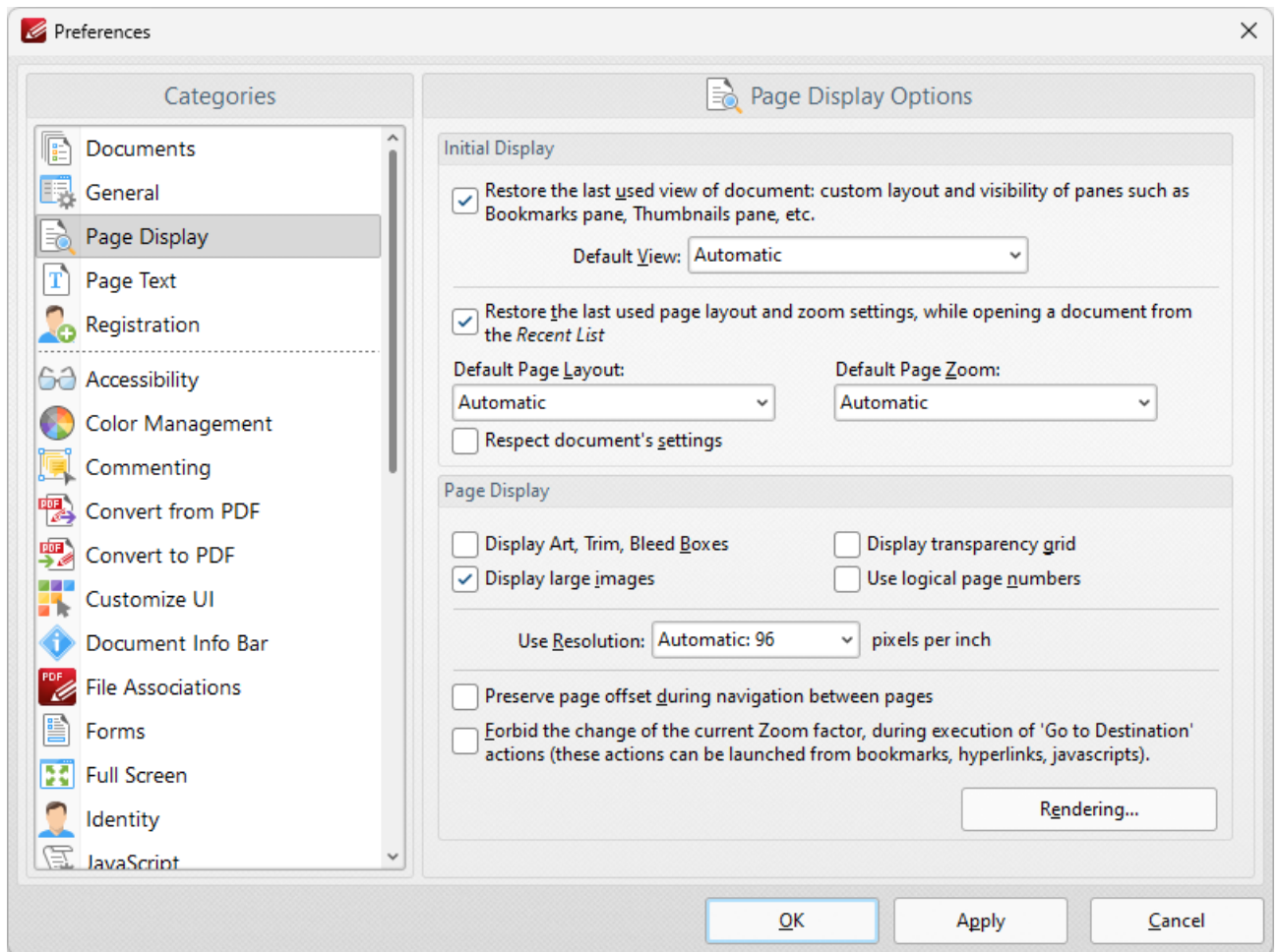
Figure 1. Preferences Dialog Box, Page Display Tab Selected

- The **Initial Display** settings determine the layout of documents when they are opened:
  - Select the upper check box to restore the most recent display settings. Please note that the **Crop Pages** [674] settings can be used to determine page boxes.
  - Use the **Default View** menu to select the default viewing parameters for documents.

- Select the middle check box to retain the most recently used page layout and zoom settings when recent document are opened.
- Use the **Default Page Layout** and **Default Page Zoom** dropdown menus to determine the default layout and zoom settings.
- Select the lower check box to override the settings determined in this section with the existing settings of documents.

- The **Page Display** settings determine what is displayed on the active page:
  - Select the required check boxes. Please note that the **Crop Pages** 674 feature can be used to define the **Art, Trim** and **Bleed 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'** 997 actions are launched.
  - Click the **Rendering** button to determine the rendering settings. The following dialog box will open:
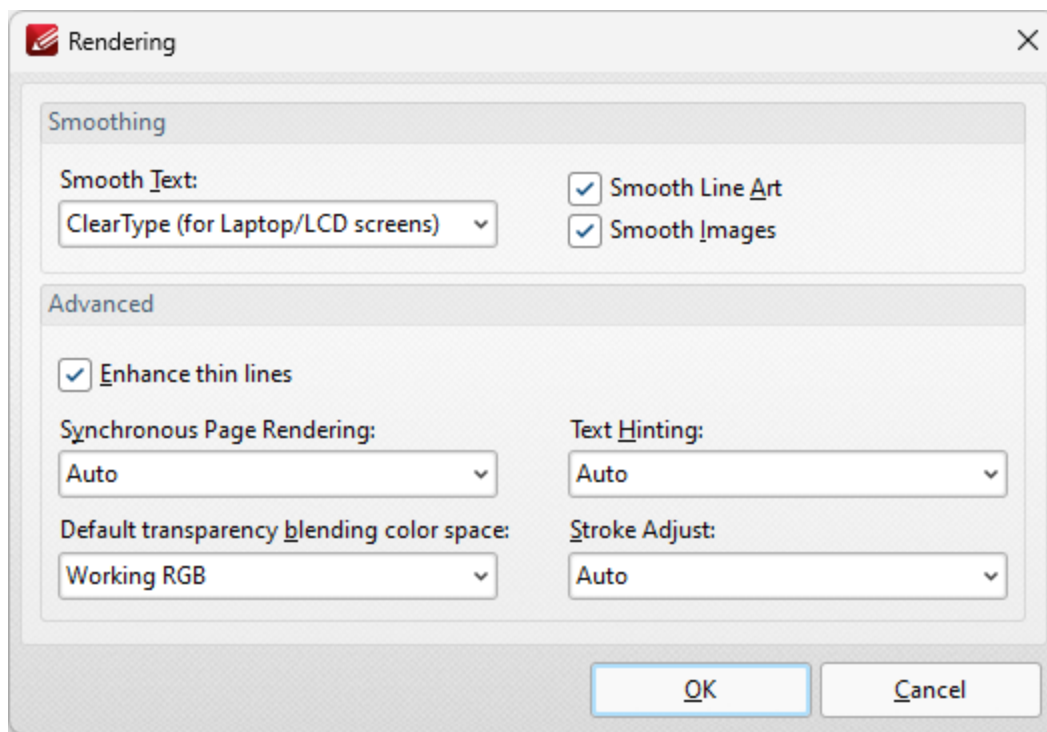
Figure 2. Rendering Dialog Box

- The **Smoothing** options are used to smooth PDF content and create a softer appearance:
  - Select the desired format for smoothing text.
  - Select the **Smooth Line Art** and **Smooth Images** boxes as desired.
  - Please note that some fine detail may be lost as a result of using these options.

- 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).
- Use the **Synchronous page rendering** menu to define the page rendering method:
  - Select **No** to disable synchronous page rendering. If this option is selected then rendering results are displayed when they are complete. Page scrolling is always smooth when this option is selected, but some pages may be blank initially. This option is best for heavy documents that contain a lot of content, as it ensures that **PDF-XChange Editor** remains fully responsive at all times.
  - Select **Yes** to enable synchronous page rendering. If this option is selected then the page view in **PDF-XChange Editor** will wait until the content of all visible pages is rendered before displaying it on the screen. Pages will not be blank initially, but page scrolling will not always be smooth – especially on pages that contain a significant amount of content. This option is best for light documents – for example documentation that contains predominantly text and a small amount of images.
  - Select **Auto** to combine the benefits of synchronous and asynchronous rendering. If the rendering time is small – for example in light documents – then **PDF-XChange Editor** operates with synchronous rendering enabled. However, if the rendering time exceeds a given threshold, then it will switch to asynchronous rendering. This means that no pages will be displayed as blank initially for light documents, and that page scrolling is always smooth for heavy documents.
- 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.
- Use the **Text Hinting** menu to enable/disable text hinting, or set this feature to **Auto** as desired. Text hinting adjusts the display of outline fonts to make them line up with a rasterized grid.
- Use the **Stroke Adjust** menu to enable/disable the stroke adjust feature. Stroke adjust specifies that the line widths and coordinates of strokes are adjusted automatically to produce strokes of uniform thickness. This is performed in order to compensate for the effects of rasterization and fit lines (and other figures) more precisely to the pixel grid of monitors and other displays. The width will be as near as possible to the requested line width, and no more than half a pixel in difference. Please note that disabling **Smooth Line Art** when stroke adjust is enabled will have a negative effect on image quality.
  - **On** forces the use of stroke adjust in all cases.
  - **Off** disables the use of stroke adjust.
  - **Auto** determines the use of stroke adjust according to the content of the file. Note that stroke adjust is not specified in most cases, and the default value is **On.**

Click **OK** to enable adjusted parameters. Then, in the **Page Display** tab, click **Apply** to apply changes and **OK** to save changes.

5.2.11.4 Page Text

Page Text

When the **Page Text** tab is selected the following options are available:
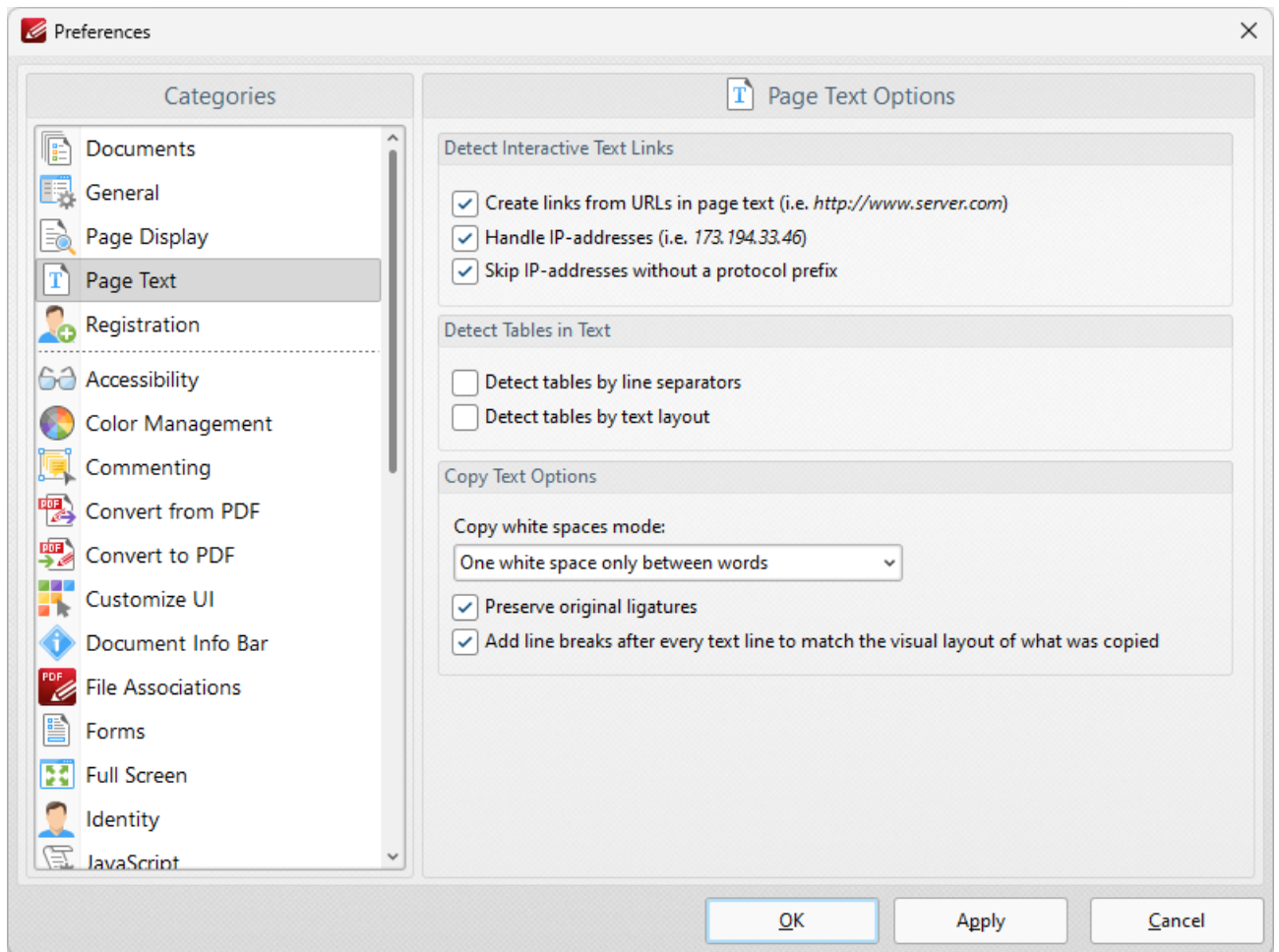
Figure 1. Preferences Dialog Box, Page Text Tab Selected

- Select the **Detect Interactive Text Links** check boxes as desired to determine the parameters for interactive text.
- Select an option from the **Copy white spaces mode** dropdown menu to determine the outcome when white space 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 will be created from individual letters instead.
- Use the check boxes in the **Bookmark Creation Options** section to determine text settings when bookmarks are created.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.5 Registration

Registration

When the **Registration** tab is selected the following options are available:
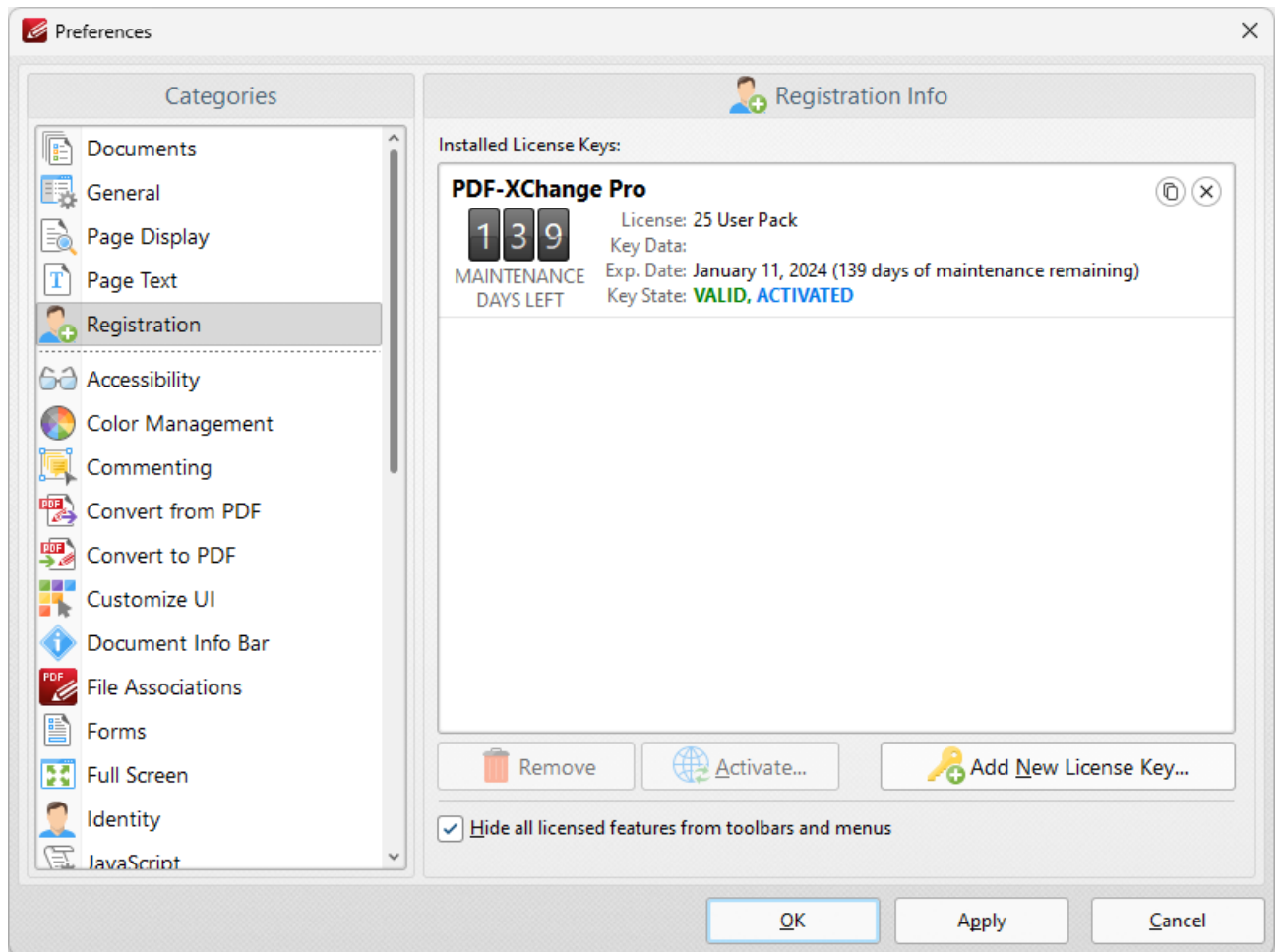
Figure 1. Preferences Dialog Box, Registration Tab Selected

The **Registration** tab is used to register/edit license keys in **PDF-XChange Editor.** Current keys and their details are displayed in the **Installed License Keys** pane.

- Click **Add New License Key** to add new license keys.

- Click **Remove** to remove current license keys.
- Click **Activate** to activate keys that are detailed in the pane but have not yet been activated. You can then select to either **Activate via Internet**, which will activate the license key immediately, or **Activate Manually,** which requires the saving of the license key to a device such as a USB stick for subsequent activation. The latter option is intended for use in cases where an internet connection is not immediately available.
- Select the **Hide all licensed features from toolbars and menus** box to remove licensed features from the free version of **PDF-XChange Editor.**

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.6 Accessibility

Accessibility

When the **Accessibility** tab is selected the following options are available:
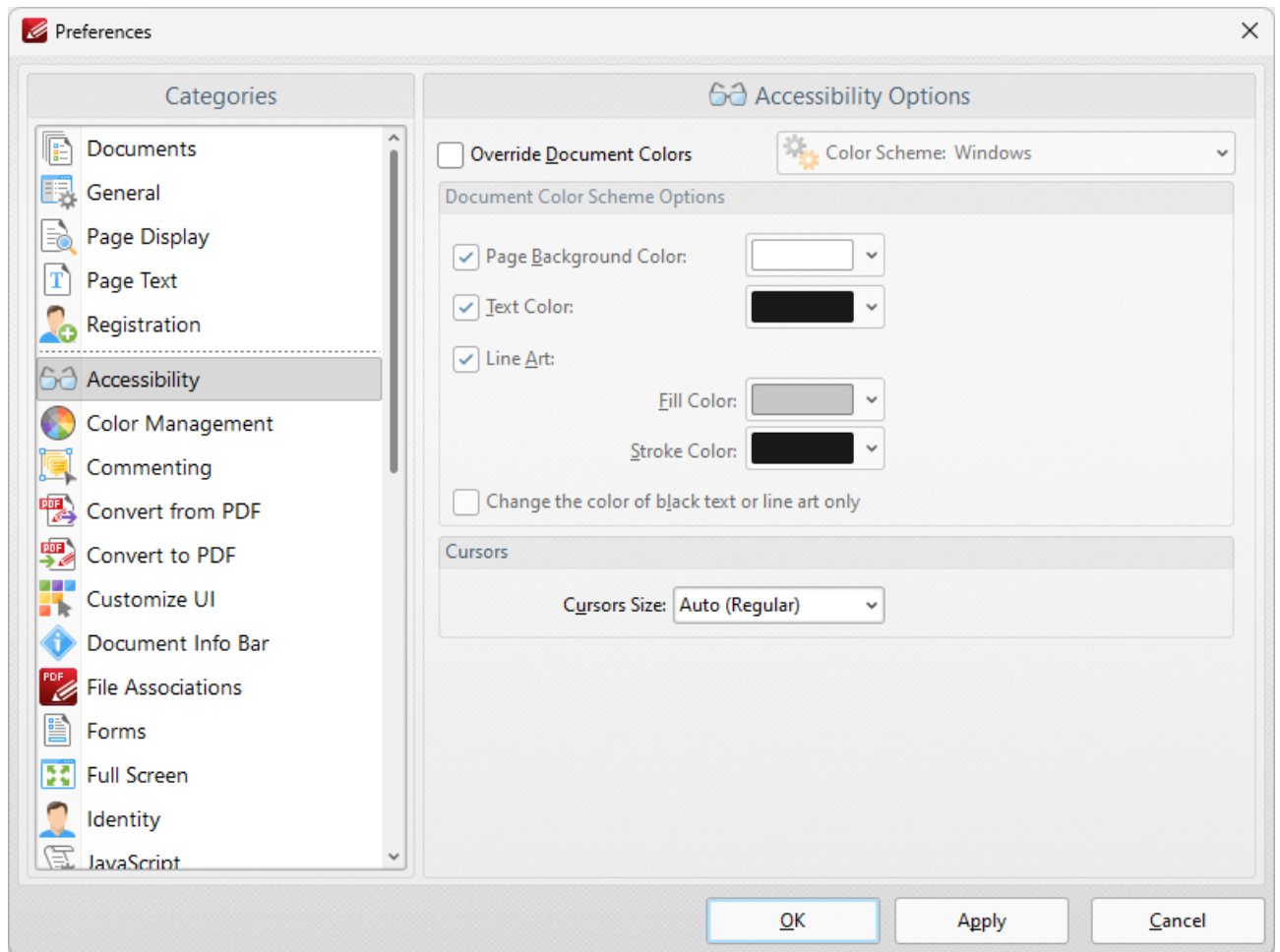
Figure 1. Preferences Dialog Box, Accessibility Tab Selected

The **Accessibility** tab is used to control the color options of PDF documents.

- Select the **Override Document Colors** box to enable further options.

- Use the **Page Background Color/Text Color** dropdown menus to determine the page background/text color.
- Use the **Line Art** dropdown menus to determine the **Fill Color** and **Stroke Color** used for line art.
- Select the **Change the color of black text or line art only** box to apply changes to only black text/line art.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.7 Color Management

Color Management

When the **Color Management** tab is selected the following options are available:
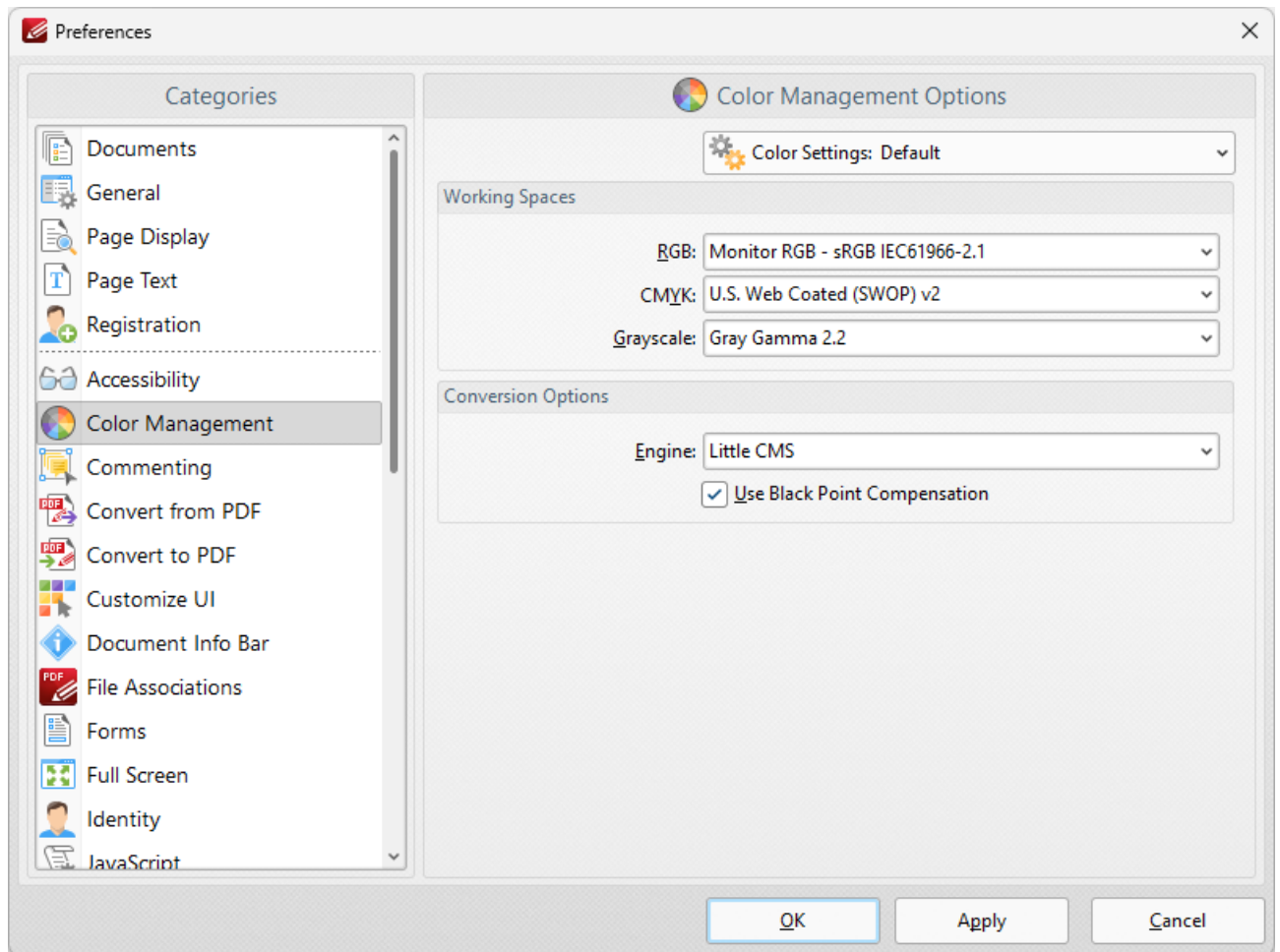
Figure 1. Preferences Dialog Box, Color Management Tab Selected

- The **Color Settings** dropdown menu is used to store and manage customized color profiles. Use this menu to save settings when they have been adjusted using the options detailed below.
- Use the **RGB, CMYK** and **Grayscale** dropdown menus to determine the settings for these color modes.

- Use the **Engine** dropdown menu to determine the engine used for color management.
- Select the **Use Black Point Compensation** box to enable black point compensation, which is a technique used in digital photography printing for the creation of adjustments between the maximum black levels of digital files and the black capabilities of digital devices.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.8 Commenting

Commenting

When the **Commenting** tab is selected the following options are available:
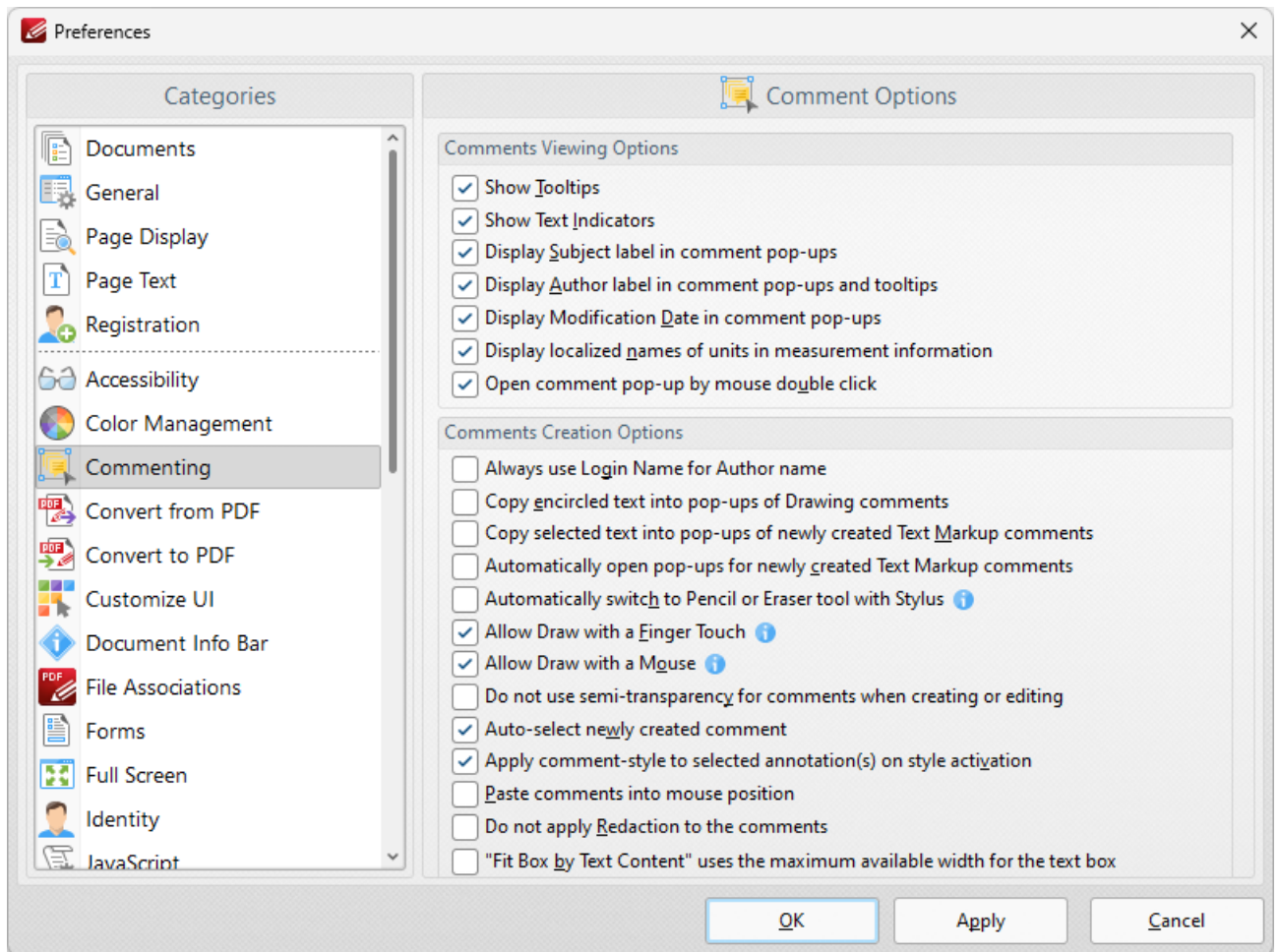
Figure 1. Preferences Dialog Box, Commenting Tab Selected

These options determine the settings for comments:

- Select the boxes in the **Comments Viewing Options** section to determine options for displayed comments.

- Select the **Always use Login Name for Author name** box to use your login name as the author name for comments.
- Select the **Copy encircled text into pop-ups of Drawing comments** box as desired. This setting is used in conjunction with the shape annotations. Text that new shape annotations encircle is automatically added into their pop-up note when this setting is enabled.
- Select the **Copy selected text into pop-ups of newly created Text Markup comments** box as desired. Text that the **Highlight, Strikeout** and **Underline Text** tools are used to annotate will automatically be copied into their pop-up note when this setting is enabled.
- Select the **Automatically open pop-ups for newly created Text Markup comments** box as desired.
- Select the **Automatically Switch to Pencil or Eraser tool with Stylus** box as desired.
- Select the **Allow Draw with a Finger Touch** option to enable the drawing of comments with a finger touch for touch-based devices.
- Select the **Allow Draw with a Mouse** option to enable the drawing of comments with the mouse. If this option is disabled then the stylus can be used to draw comments.
- Select the **Do not use semi-transparency for comments when creating or editing** box as desired.
- Select the **Auto-select newly created comment** box as desired.
- Select the **Apply comment-style to selected annotation(s) on style activation** box as desired.
- Select the **Paste Comment into mouse position** box to paste copied comments at the current pointer location.
- Select the **Do not apply Redaction to the comments** box to exclude comments when the **Redaction** 757 feature is used.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.9 Convert to/from PDF

Convert to/from PDF

Convert to PDF

When the **Convert to PDF** tab is selected the following options are available:
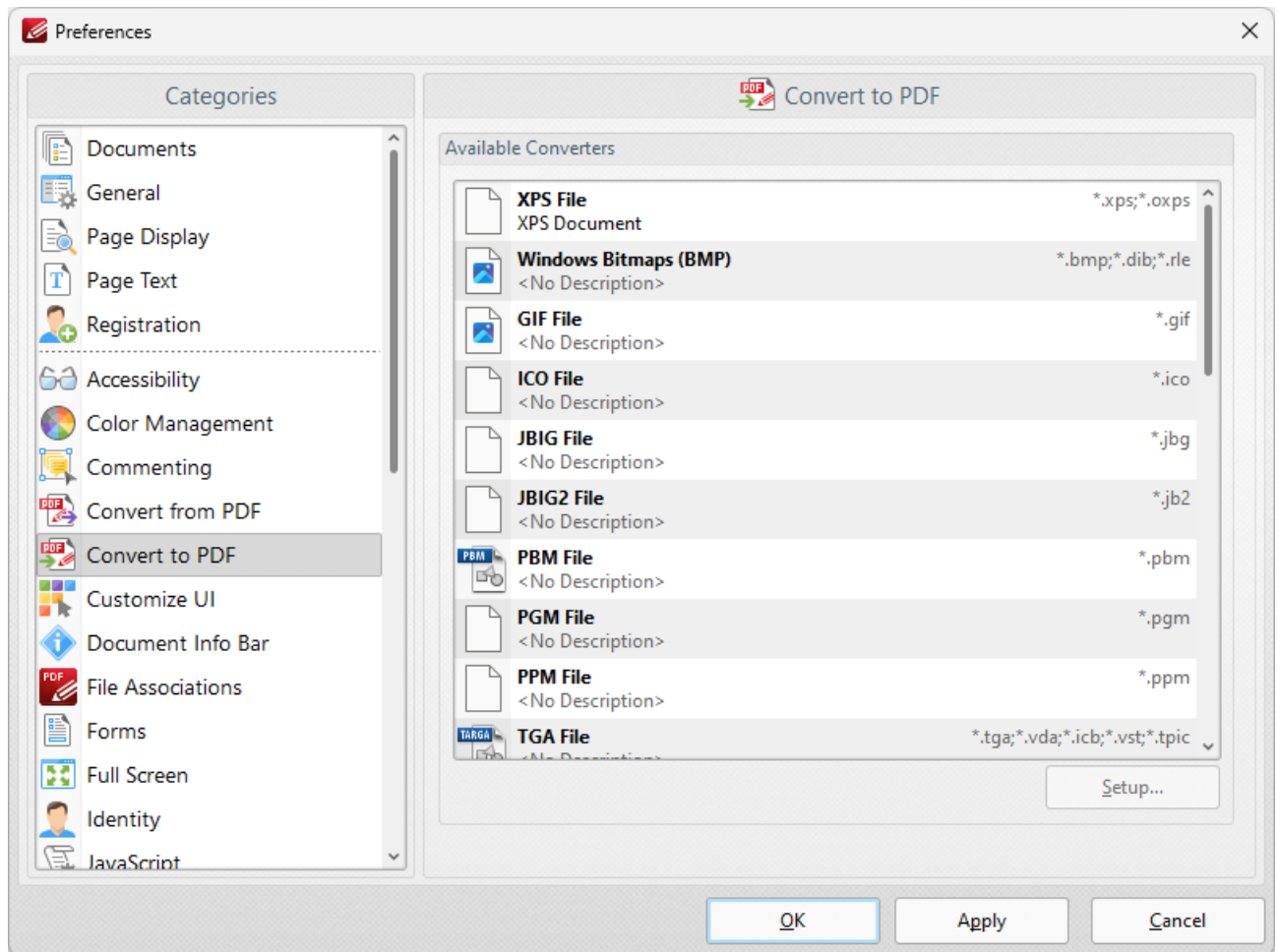
Figure 1. Preferences Dialog Box, Convert to PDF Tab Selected

This option shows the file formats that can be converted to PDF format. If selected formats have further options then the **Setup** button will be enabled.

Convert from PDF

The options in the **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 and **OK** to save changes.

5.2.11.10 Customize UI

Customize UI

When the **Customize UI** tab is selected the following options are available:
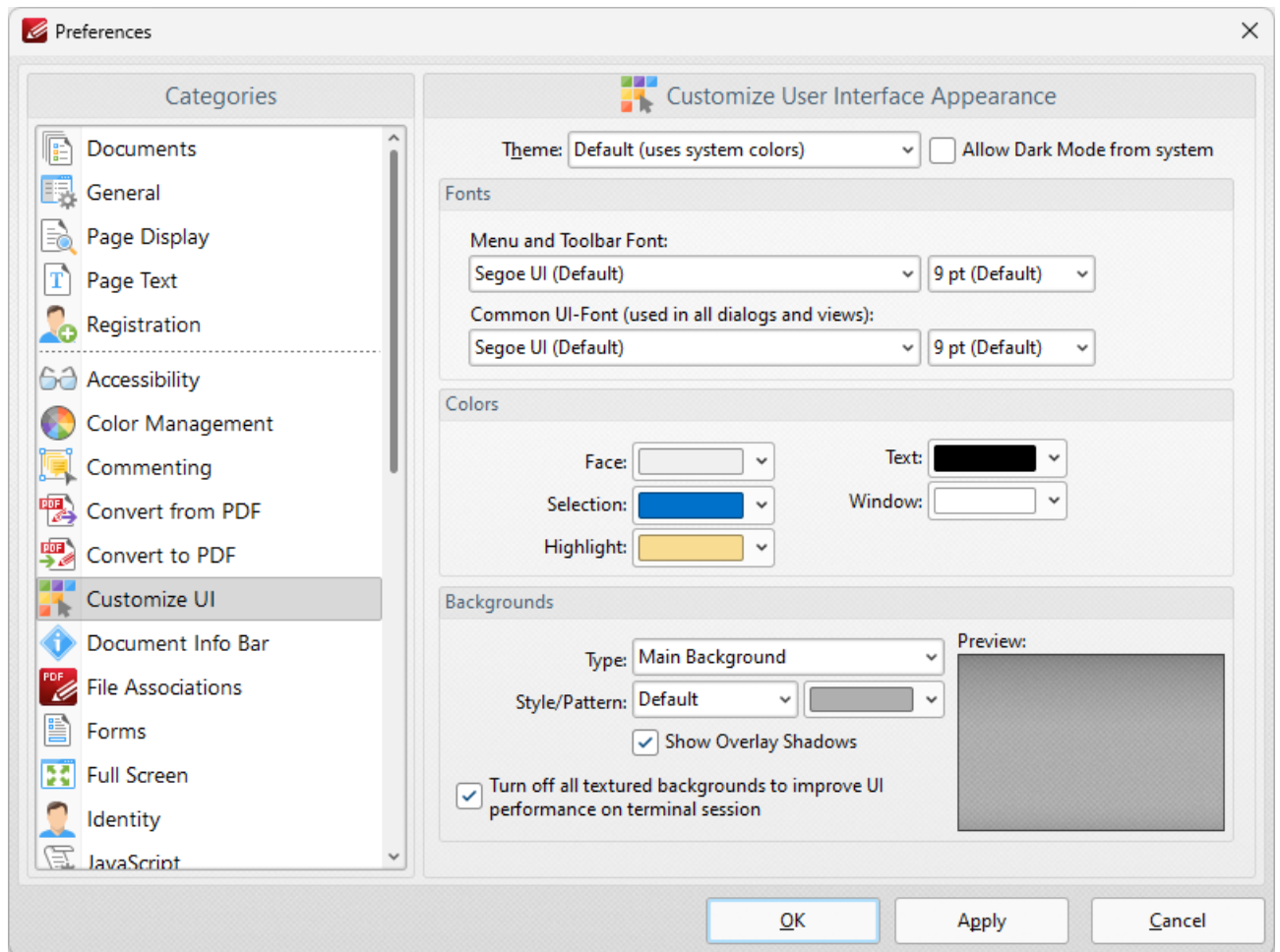
Figure 1. Preferences Dialog Box, Customize UI Tab Selected

These settings determine the appearance of the user interface:

- Use the **Theme** dropdown menu to specify the theme for the user interface. Select the **Allow Dark Mode from system** box to permit the use of dark mode for the user interface.

- Use the menus in the **Fonts** section to determine the font style and size for menus, toolbars and dialog boxes.
- Use the menus in the **Colors** section to determine the colors of the UI.
- 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 selected background.
  - Select the **Show Overlay Shadows** box as desired.
  - Select the **Turn off all textured backgrounds to improve UI performance on terminal session** box as desired.
  - Click **Reset to Defaults** to reset all UI customization.

It is also possible to customize toolbars in **PDF-XChange Editor.** Those settings are explained **here.** [492]

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.11 Document Info Bar

Document Info Bar

When the **Document Info Bar** tab is selected the following options are available:
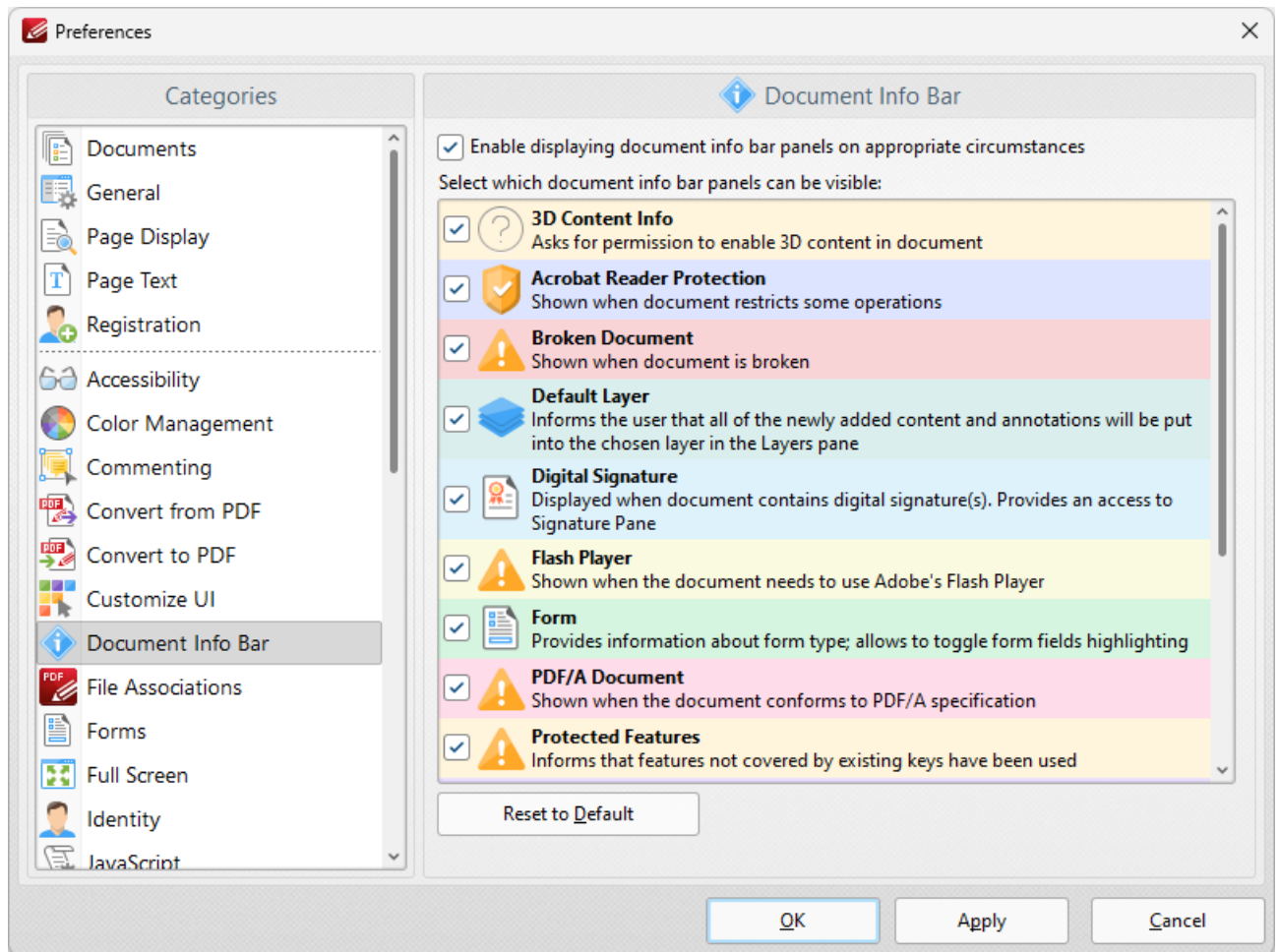
Figure 1. Preferences Dialog Box, Document Info Bar Tab Selected

Document Info Bars appear to alert users of specific information when documents are viewed/edited in **PDF-XChange Editor,** as detailed in *(figure 1).*

- Select/clear the upper check box to enable/disable **Document Info Bars.**

- Select/clear the eight remaining check boxes to enable/disable the associated **Document Info Bars.**
- Click **Reset to Default** to reset all **Document Info Bars** to their default values.

Click **Apply** to apply changes and **OK** to save changes. A sample **Document Info Bar** is displayed below:
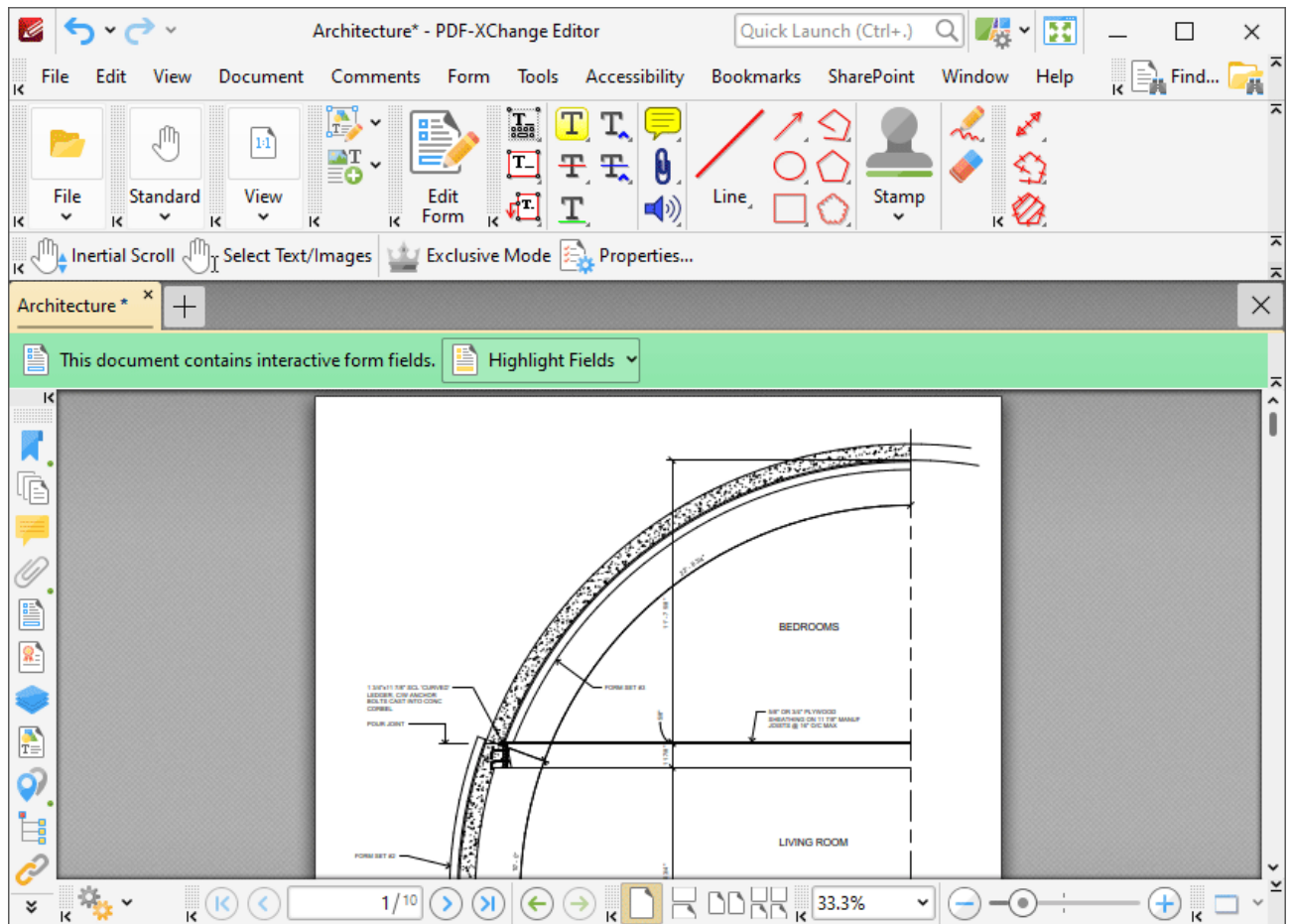
Figure 2. Form Document Info Bar

5.2.11.12 File Associations

 File Associations

When the **File Associations** tab is selected the following options are available:
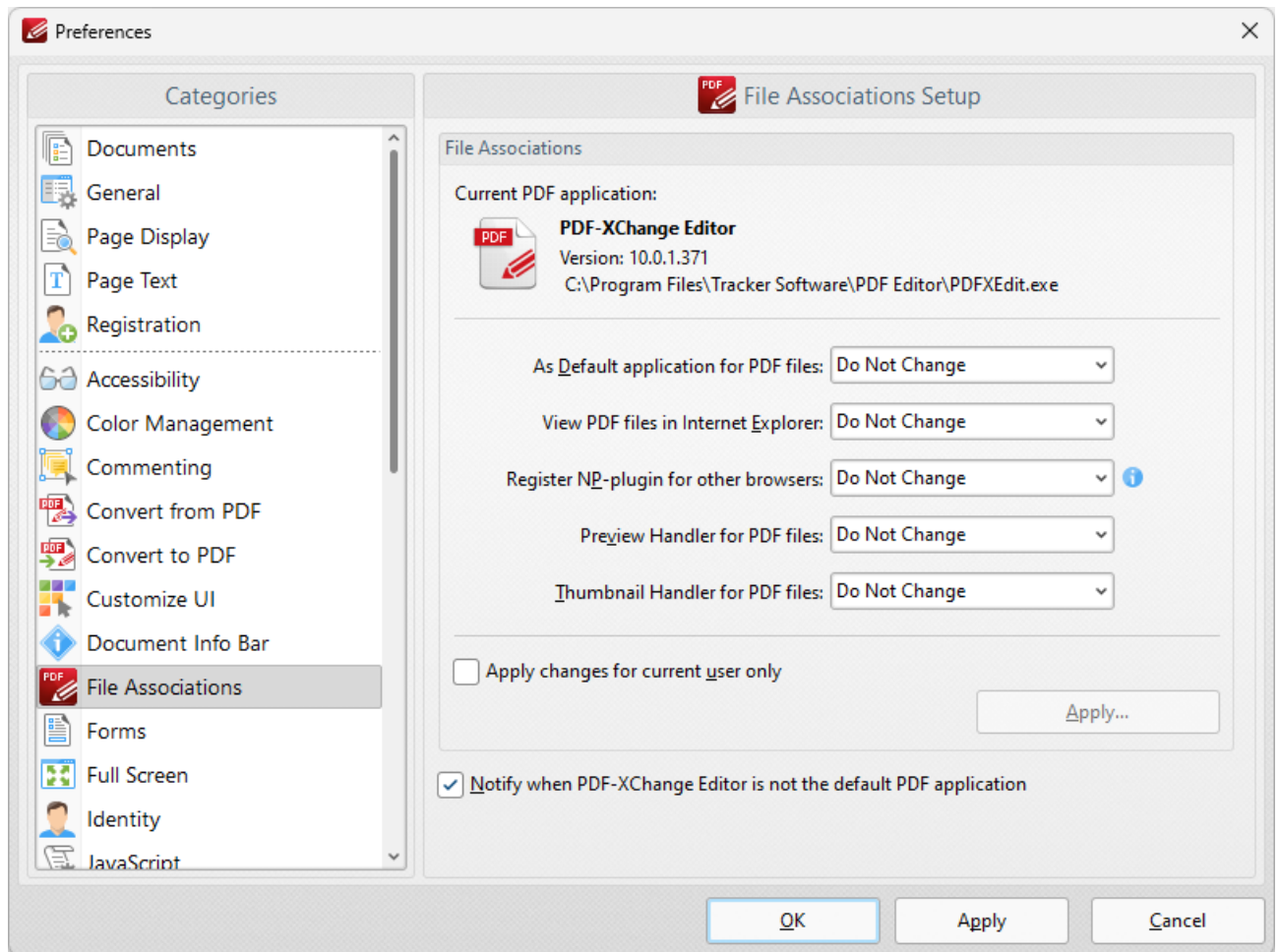
Figure 1. Preferences Dialog Box, File Associations Tab Selected

File associations are used to associate file types with applications capable of opening those file types. The file association preferences in **PDF-XChange Editor** determine the settings for the **PDF** application designated as the current application for PDF files. This file association settings for **Windows** can be

used to determine the current application for PDF files. **PDF-XChange Editor** is set as the default application in *(figure 1).*

- Use the dropdown menus to adjust the settings for the current application.
- Select the **Apply changes only for current user** box as desired. Click **Apply** to apply changes for only the current user.
- 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 and **OK** to save changes.

5.2.11.13 Forms

Forms

When the **Forms** tab is selected the following options are available:
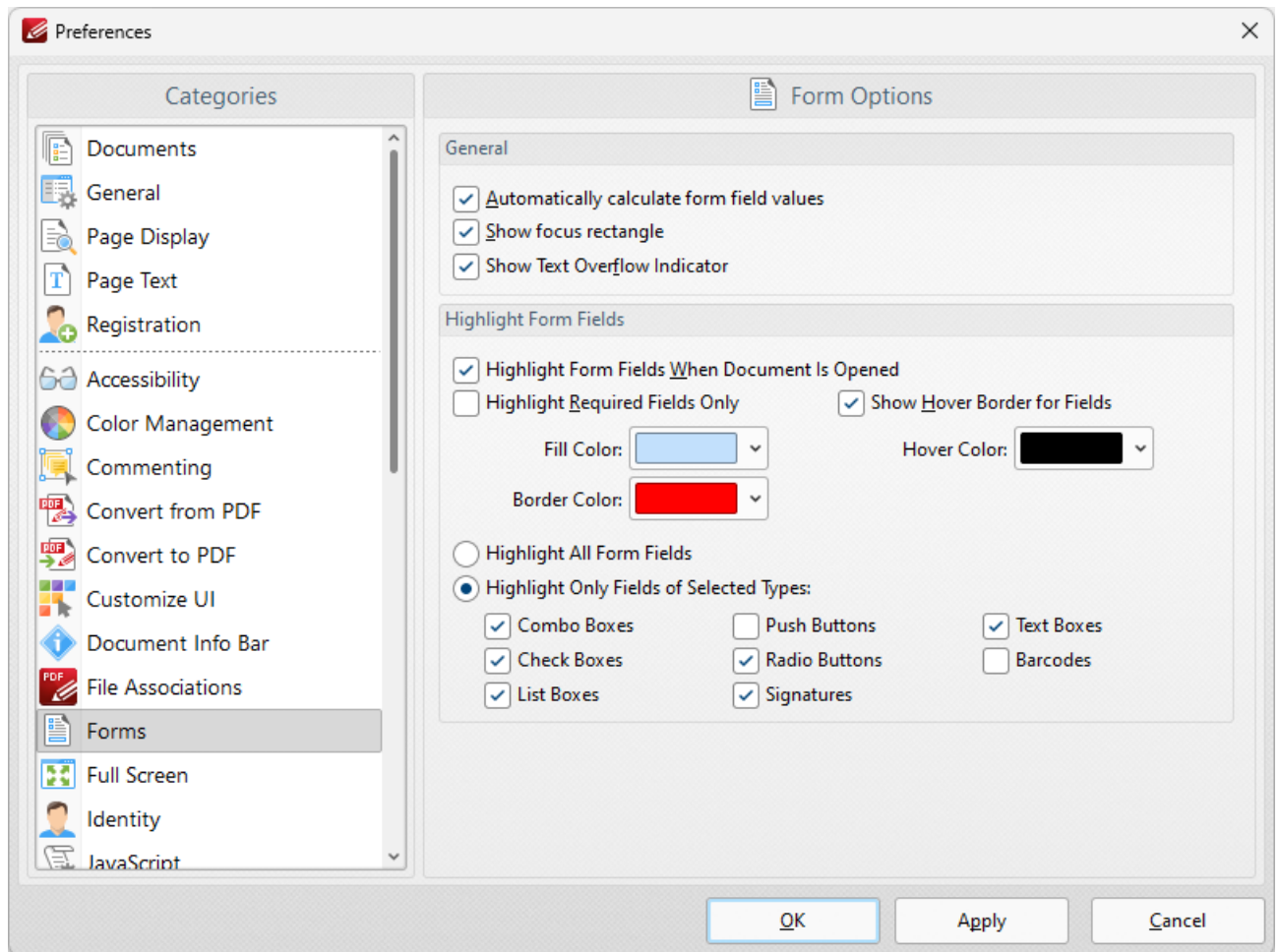
Figure 1. Preferences Dialog Box, Forms Tab Selected

These settings determine the options for forms in **PDF-XChange Editor.** There are several forms available in **PDF-XChange Editor,** which each feature different features and functionality. Further information on forms is available **here.** 319

The options in the **General** section are as follows:

- Select the **Automatically calculate form field values** box to perform form field calculations automatically in forms that have been set up to perform calculations. Further information on this process is available **here.** 339
- Select the **Show focus rectangle** box to enable the focus rectangle, which indicates the form field that has focus when multiple fields are selected.
- Select the **Show text overflow indicator** box to enable the text overflow indicator, which is an icon that appears when text exceeds the bounds specified when form fields are created.

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. Fields designated as required must be filled before documents can be submitted. See **here** 321 for information on how to designate forms as required forms.
- Select the **Show Hover Border for Fields** box as desired.
- Use the dropdown menus to select the **Fill Color, Border Color** and **Hover Color** for highlighted forms.
- Select the **Highlight All Form Fields** option button as desired.
- Alternatively, select the **Highlight Only Fields of Selected Types** option button and then select the desired forms to be highlighted when documents are opened.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.14 Full Screen

Full Screen

When the **Full Screen** tab is selected the following options are available::
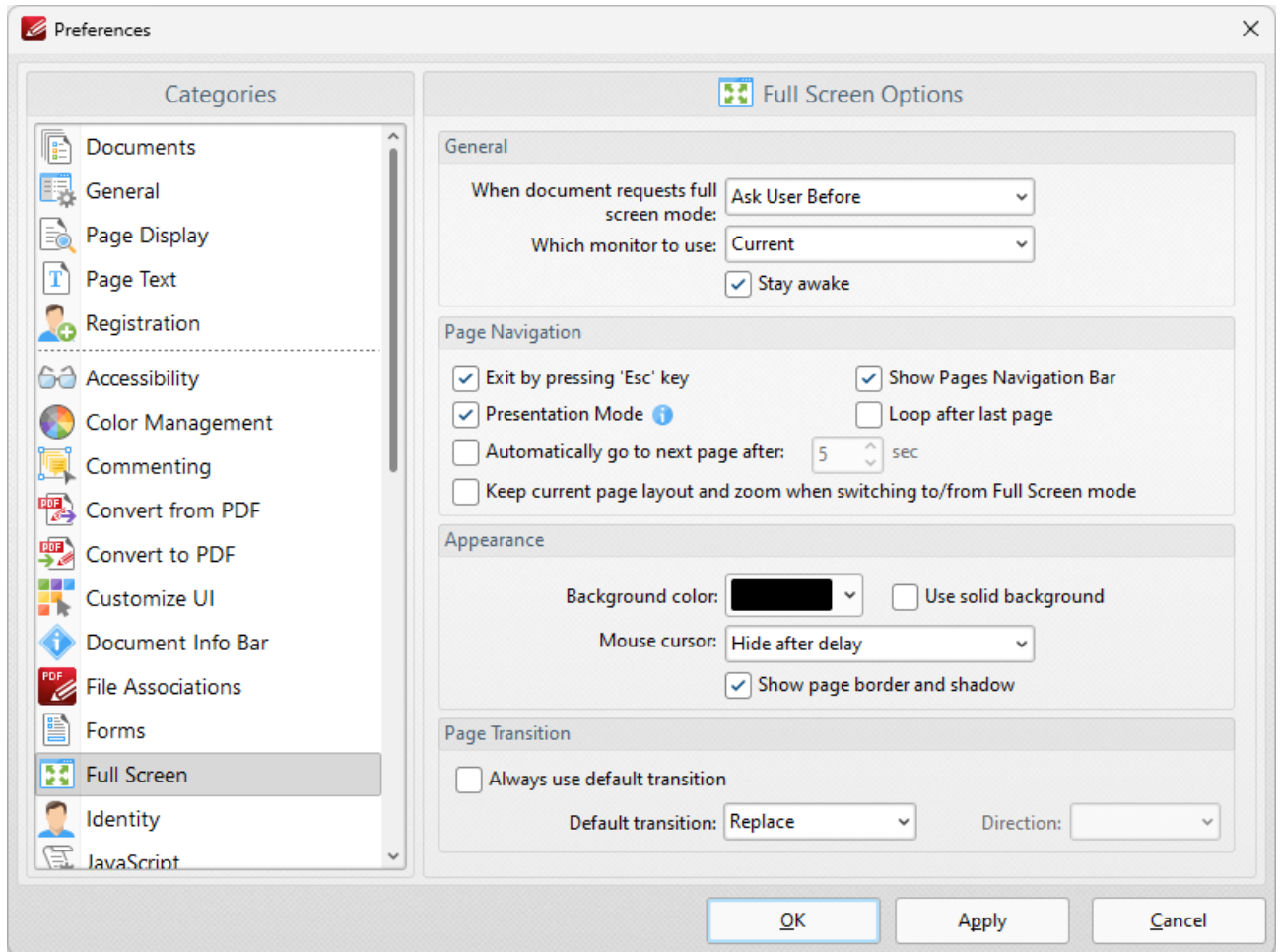
Figure 1. Preferences Dialog Box, Full Screen Tab Selected

- The **General** settings determine parameters for full screen mode:
  - Use the upper dropdown menu to determine what happens when documents request full screen mode.
  - Use the lower dropdown menu to determine which monitor is used for full screen mode.

- Select the **Stay awake** box to prevent the computer from going into screensaver/sleep/hibernate mode.

- The **Pages Navigation** settings determine navigation parameters for full screen mode:
  - Select the **Exit by pressing 'Esc' key** box to enable the use of the Esc key to exit full screen mode.
  - Select the **Show Pages Navigation Bar** to enable the **Page Navigation Toolbar** 483 when full screen mode is active.
  - Select **Presentation Mode** to enable **Presentation Mode** when full screen is enabled. This is a unique mode that is designed for giving presentations. When it is enabled the following settings are active:
    - Left-click moves to next page.
    - Right-click moves to previous page.
    - Press 'B' or 'W' to make the entire screen black or white.
    - Press 'P' to pause/resume the automatic scrolling of documents.
    - Commenting is disabled.
  - Select the **Loop after last page** box repeat documents when the last page is reached and **Presentation Mode** is enabled.
  - 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 rate of browsing.
  - Select the **Keep current page layout and zoom when switching to/from Full Screen mode** box to retain the page layout and zoom settings when moving to/from full screen mode.

- The **Appearance** settings determine further options of the software when full-screen mode is enabled:
  - Use the **Background color** dropdown menu to determine a background color when full screen mode is enabled.
  - Select the **Use solid background** box set a solid background color in full screen mode.
  - Select an option from the **Mouse Cursor** dropdown menu to determine the setting for the mouse cursor in full screen mode.

- The **Page Transition** settings determine the page transition settings:
  - Select the **Always use default transition** box to use the transition determined in the dropdown menu immediately below.
  - Select an option from the **Default Transition** menu to determine the page transition style in full screen mode.
  - Use the **Direction** dropdown menu to determine the direction of the transition style selected in the **Default transition** dropdown menu.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.15 Identity

Identity

When the **Identity** tab is selected the following options are available:
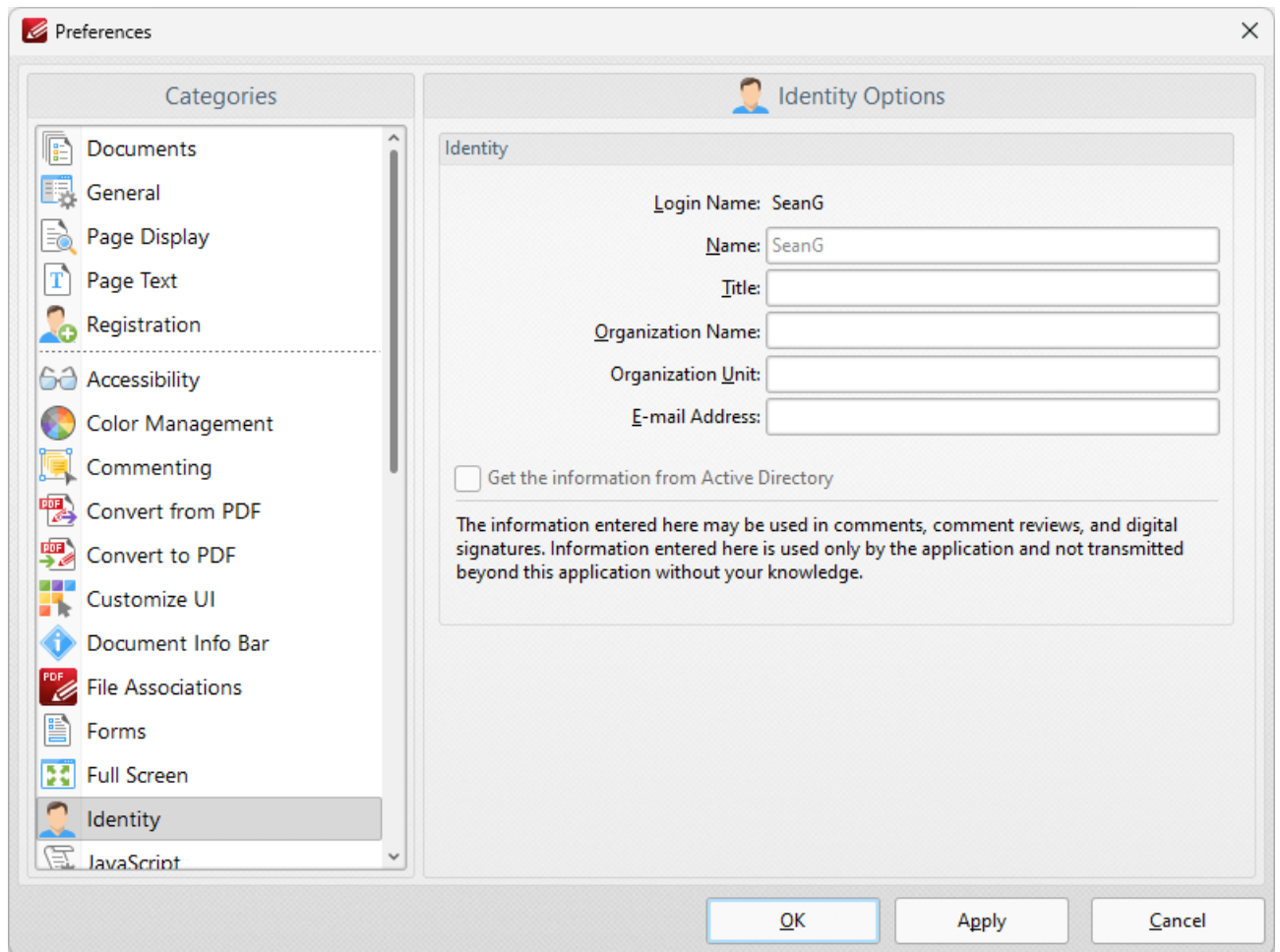
Figure 1. Preferences Dialog Box, Identity Tab Selected

The **Identity** text boxes store user information for use in comments, comment reviews and digital signatures. Enter details into the text boxes as desired.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.16 JavaScript

 JavaScript

When the **Javascript** tab is selected the following options are available:
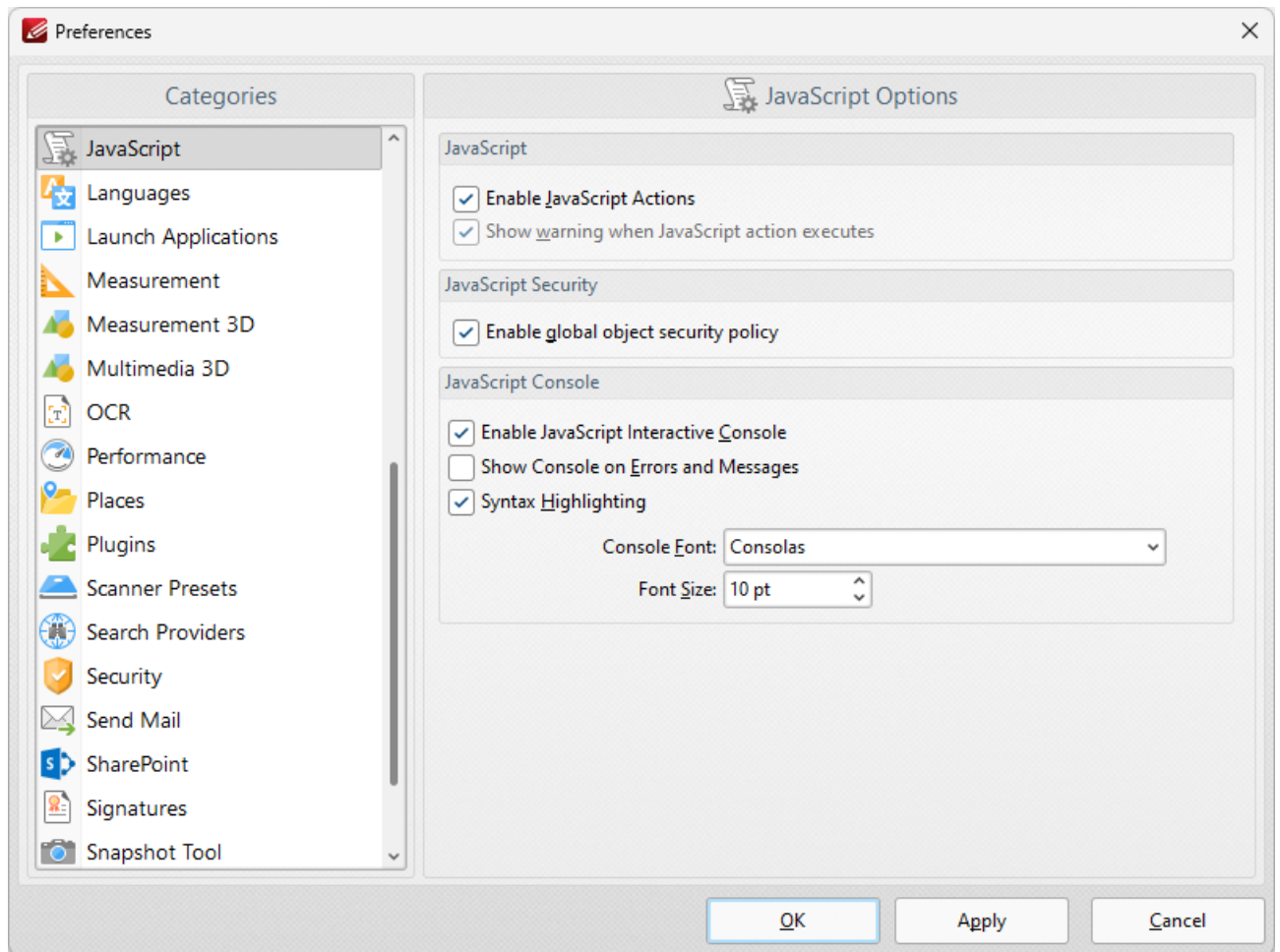
Figure 1. Preferences Dialog Box, JavaScript Tab Selected

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 enable the **JavaScript Console,** which is detailed **here.** 611
- Select the **Show Console on Errors and Messages box** to activate the console when JavaScript encounters errors.
- Select the **Syntax Highlighting** box to highlight syntax entered into the **JavaScript Console.**
- Use the **Console Font** and **Font Size** menus to determine font settings in the **JavaScript Console.**

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.17 Languages

Languages

When the **Languages** tab is selected the following options are available:
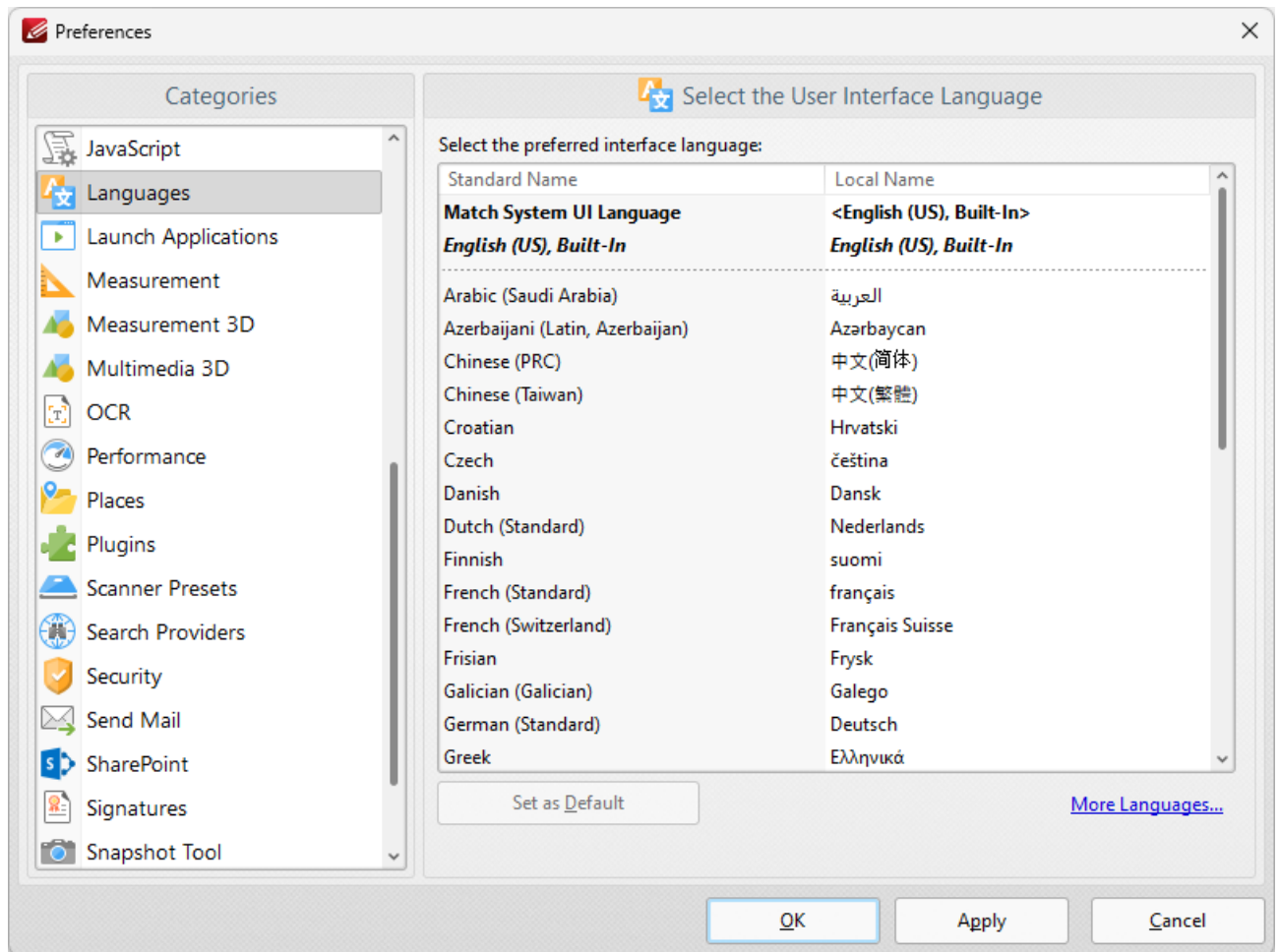
Figure 1. Preferences Dialog Box, Languages Tab Selected

- Use the language pane to set the language for the user interface of **PDF-XChange Editor.**
- Click **Set as Default** to set the selected language as the default language.
- See **here** for further information on languages in **PDF-XChange Editor.**

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.18 Launch Applications

Launch Applications

When the **Launch Applications** tab is selected the following options are available:
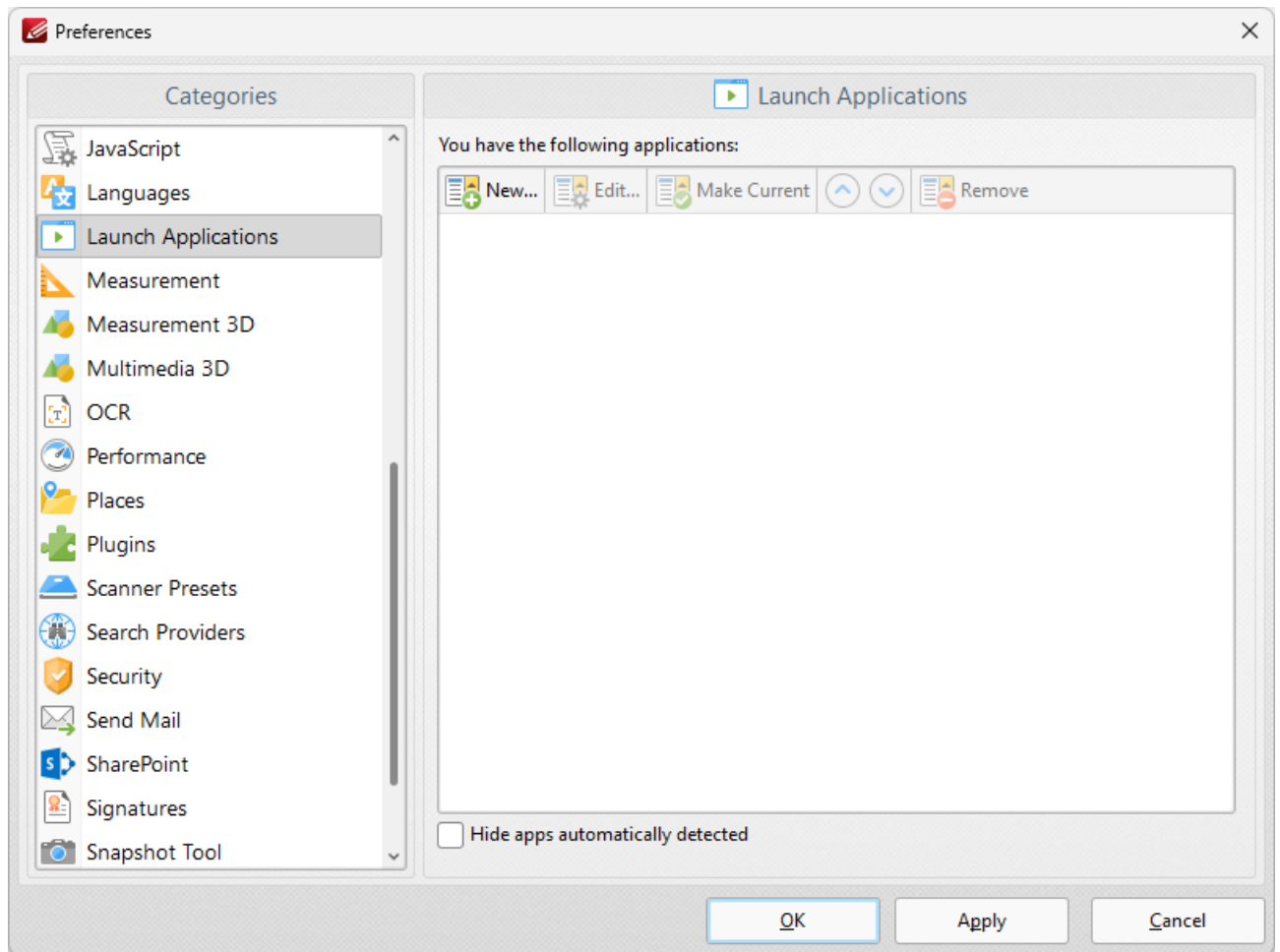
Figure 1. Preferences Dialog Box, Launch Applications Tab Selected

This pane displays the list of third-party applications currently featured in the **Launch Applications Toolbar.** 479 This toolbar provides a convenient way to open active documents using third-party applications. Follow the instructions below to add/edit applications:

- Click **New** to add a new application. The dialog box in *(figure 2)* will open.
- Click **Edit** to edit the selected application.
- Click **Make Current** to set the selected application as the default application.
- Use the arrows to move selected launch applications up or down in the window.
- Click **Remove** to remove selected applications.
- Select the **Hide applications that are detected automatically** box as desired.
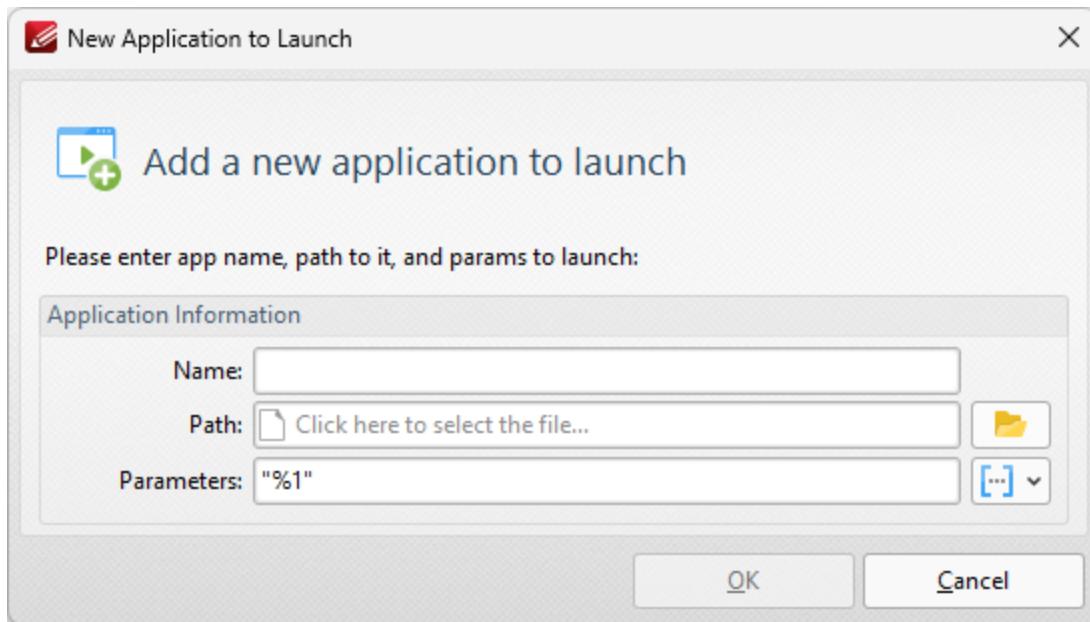
Figure 2. New Launch Application Dialog Box

- 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.
- Use the **Parameters** text box to add additional parameters to new applications. These parameters are variables that result in the retention of specific document values when documents are opened in third-party applications via the **Launch Applications Toolbar.** All available parameters are **macros.** 1157 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule that specifies how input characters should be entered to create corresponding output. Enter macros in the **Parameters** text box as desired. Alternatively, use the dropdown icon to select macros manually. The following parameters are available for all applications:
    - **File name,** which uses the syntax **%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 syntax **%z** and inherits the zoom level.
    - **Page Number,** which uses the syntax **%p** and inherits the current page number.
    - **Page (0-base numeration),** which uses the syntax **%p0** and inherits the first numerical page number that starts at 01, 02 etc.

- **Position X (in pixels),** which uses the syntax **%vx** and inherits the position viewed position viewed along the x axis.
- **Position Y (in pixels),** which uses the syntax **%vy** and inherits the position viewed position viewed along the y axis.
- **Position X (in pt),** which uses the syntax **%px** and inherits the position viewed position viewed along the x axis in pt.
- **Position Y (in pt),** which uses the syntax **%py** and inherits the position viewed position viewed along the y axis in pt.
- **View Rotation,** which uses the syntax **%vr** and inherits the rotation value of documents.
- Additional macros to 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.

5.2.11.19 Measurement

![PDF-XChange Measurement icon] **Measurement**

When the **Measurement** tab is selected the following options are available:
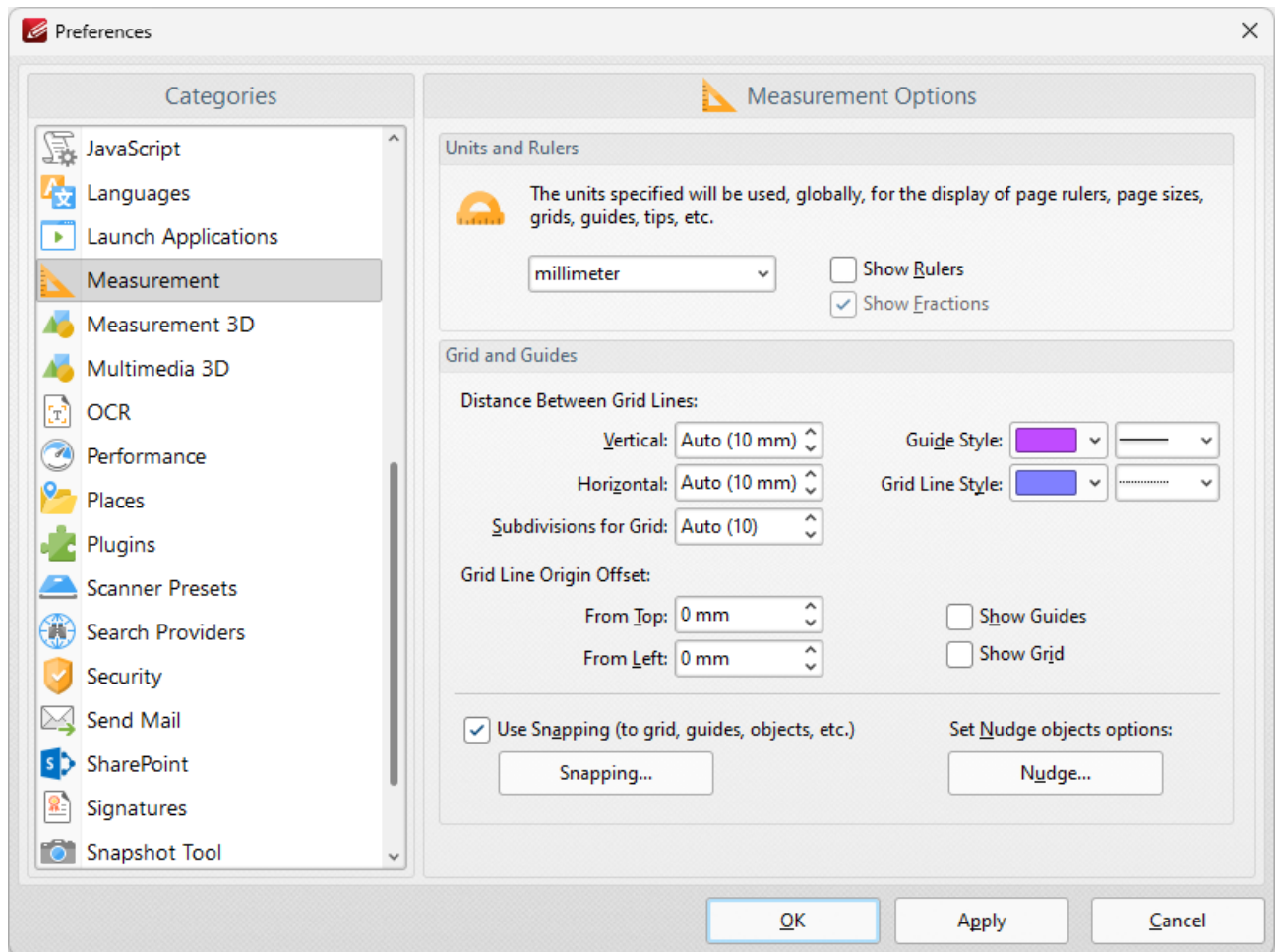
Figure 1. Preferences Dialog Box, Measurement Tab Selected

These options determine the units of measurement and certain feature layout options in **PDF-XChange Editor:**

- Use the **Units** and **Rulers** dropdown menu to determine the units of measurement.

- Select the **Show Rulers** box to enable document rulers.
- Select the **Show Fractions** box to enable fractions in units of measurement.
- Use the **Grids and Guides** section to determine the layout and color of document grids/guides. These features are used to assist in document editing, as detailed **here.** [610]
- Select the **Use Snapping** box to enable snapping, which assists in the precise placement of document content.
- Click **Nudge** to determine the settings for the nudge feature, which is used to manually adjust the position of selected document content/comments:
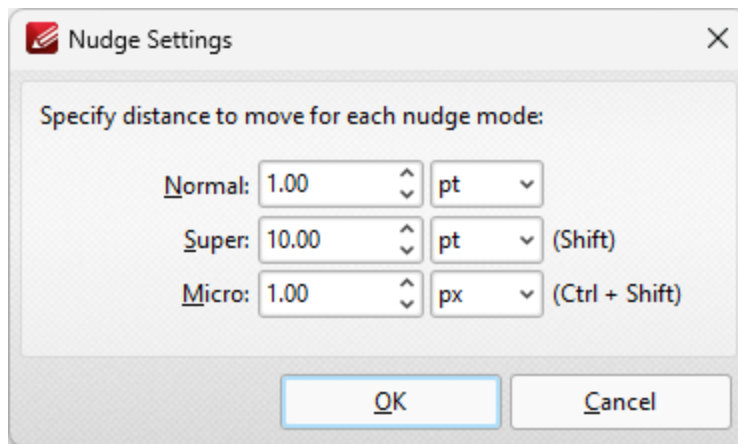
Figure 2. Nudge Settings Dialog Box

- Enter the desired value and units of measurement in the **Normal** dropdown menus to determine the standard nudge size. Selected content will be moved according to these dimensions when the arrow keys are used.
- Enter the desired value and units of measurement in the **Super** dropdown menus to determine the 'super' nudge size. Selected content will be moved according to these dimensions when Shift is pressed and the arrow keys are used.
- Enter the desired value and units of measurement in the **Micro** dropdown menus to determine the 'micro' nudge size. Selected content will be moved according to these dimensions when Ctrl+Shift are pressed and the arrow keys are used.

- Click **Snapping** to customize snapping parameters:
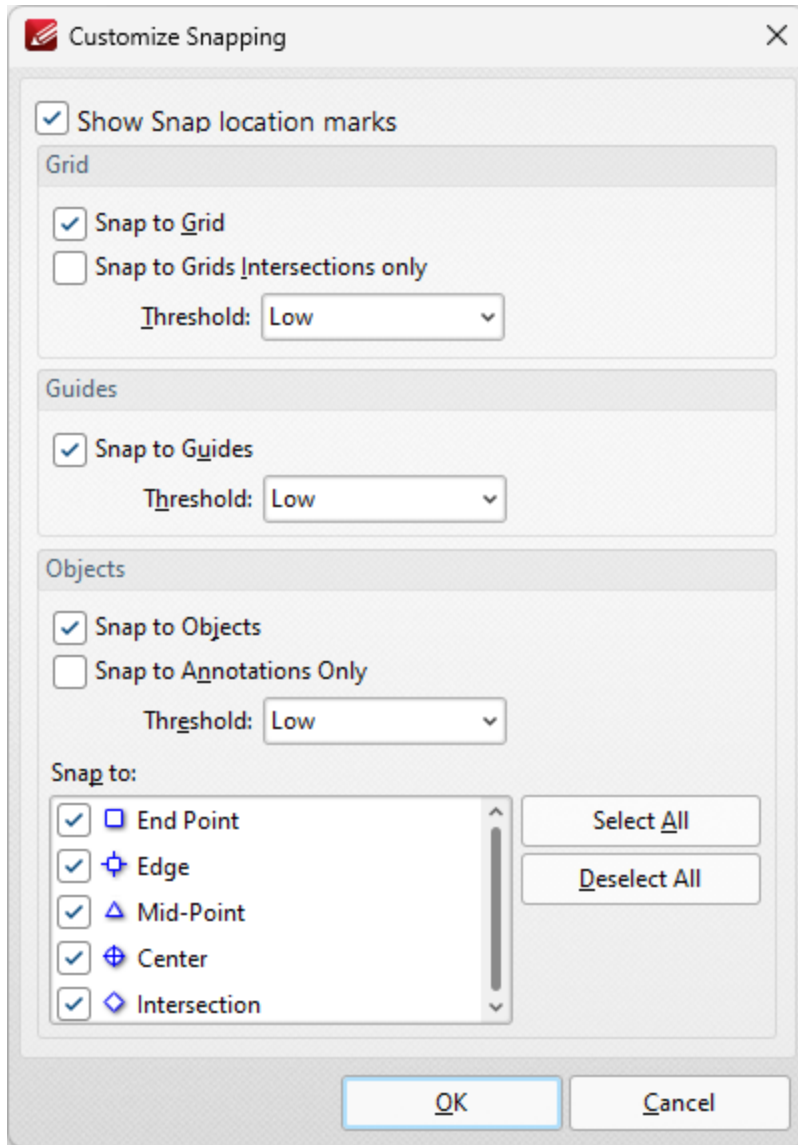
Figure 3. Customize Snapping Dialog Box

- 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 to only the grid intersections.
- 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 snapping operates in conjunction with objects:
  - Select the **Snap to Objects** box to enable snapping to objects.
  - Select the **Snap to Annotations Only** box to enable snapping to only annotations and not other objects.
  - Use the **Threshold** menu to determine the level of sensitivity for snapping to objects.

- Select the check boxes in the **Snap to** menu to determine at which points snapping is enabled for objects.

Click **OK** to save changes. Then, in the **Preferences** dialog box, click **Apply** to apply changes and **OK** to save changes.

5.2.11.20 Measurement 3D

Measurement 3D

When the **Measurement** tab is selected the following options are available:
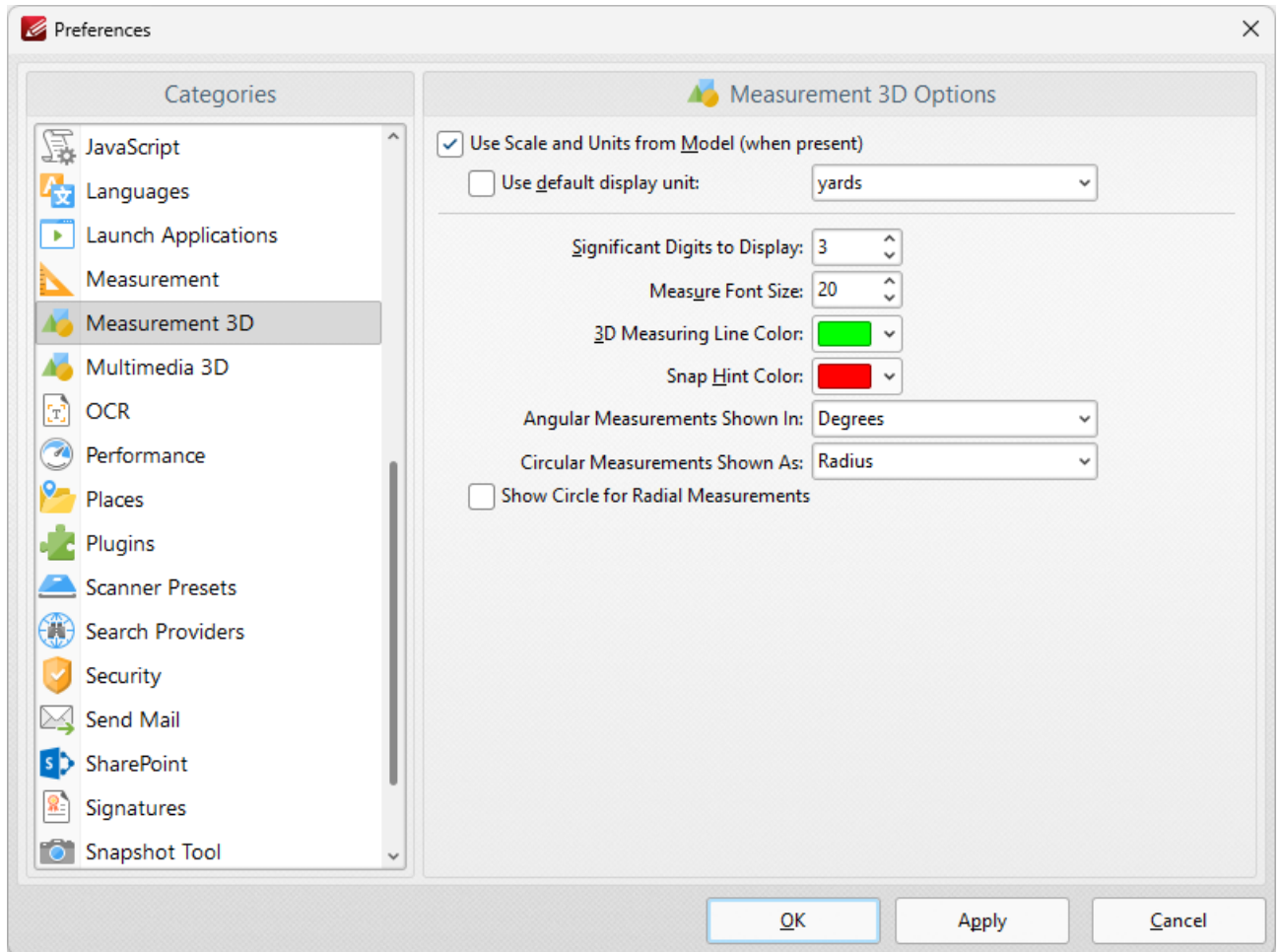
Figure 1. Preferences Dialog Box, Measurement 3D Tab Selected

- Select the **Use Scale and Units from Model** box to the the scale and units in cases where they are present for the current document.
- Select the **Use default display unit** box to specify a default measurement unit, then select the desired unit of measurement in the adjacent dropdown menu.

- Use the **Significant Digits to Display** dropdown menu to determine how many decimal places are displayed for 3D measurements.
- Use the **Measure Font Size** dropdown menu to determine the font size used for measurements.
- Use the **3D Measuring Line Color** dropdown menu to determine the color used for 3D measurement lines.
- Use the **Snap Hint Color** dropdown menu to determine the color used for snapping hints.
- Use the **Angular Measurements Shown In** dropdown menu to determine the units of measurement used for angular measurements.
- Use the **Circular Measurements Shown As** dropdown menu to determine the units of measurement used for circular measurements.
- Select the **Show Circle for Radial Measurements** check box to enable/disable the display of the circle for radial measurements.

5.2.11.21 Multimedia 3D

Multimedia 3D

When **Multimedia 3D** tab is selected the following options are available:
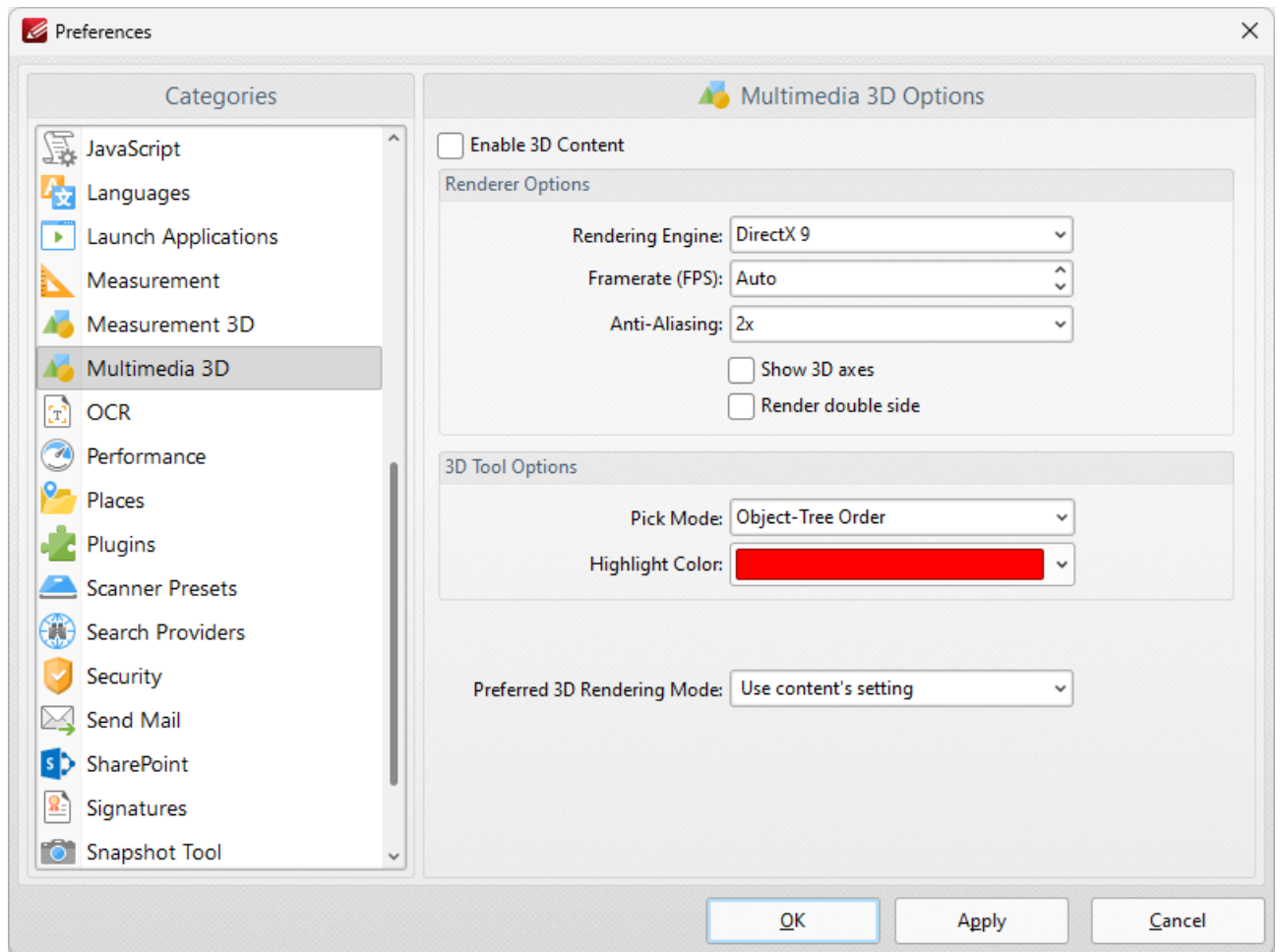
Figure 1. Preferences Dialog Box, Multimedia 3D Tab Selected

- Select the **Enable 3D Content** box to enable 3D content in documents. Note that only U3D content is supported at the moment.
- Use the **Renderer Options** to determine how 3D content is rendered:

- Select an option in the **Rendering Engine** dropdown menu to determine the rendering engine used.
- Select an option in the **Framerate** dropdown menu to determine the frames per second for 3D content.
- Select an option in the **Anti-Aliasing** dropdown menu to determine the level of anti-aliasing, which reduces the level of distortion that is sometimes seen in 3D images. Note that increasing the level of anti-aliasing requires more memory.
- Select/clear the **Show 3D axes** box to display/hide 3D axes as desired.
- Select an option in the **Pick Mode** dropdown menu to determine the order in which 3D objects are selected.
- Select a **Highlight Color** as desired.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.22 OCR

 OCR

When **OCR** tab is selected the following options are available:
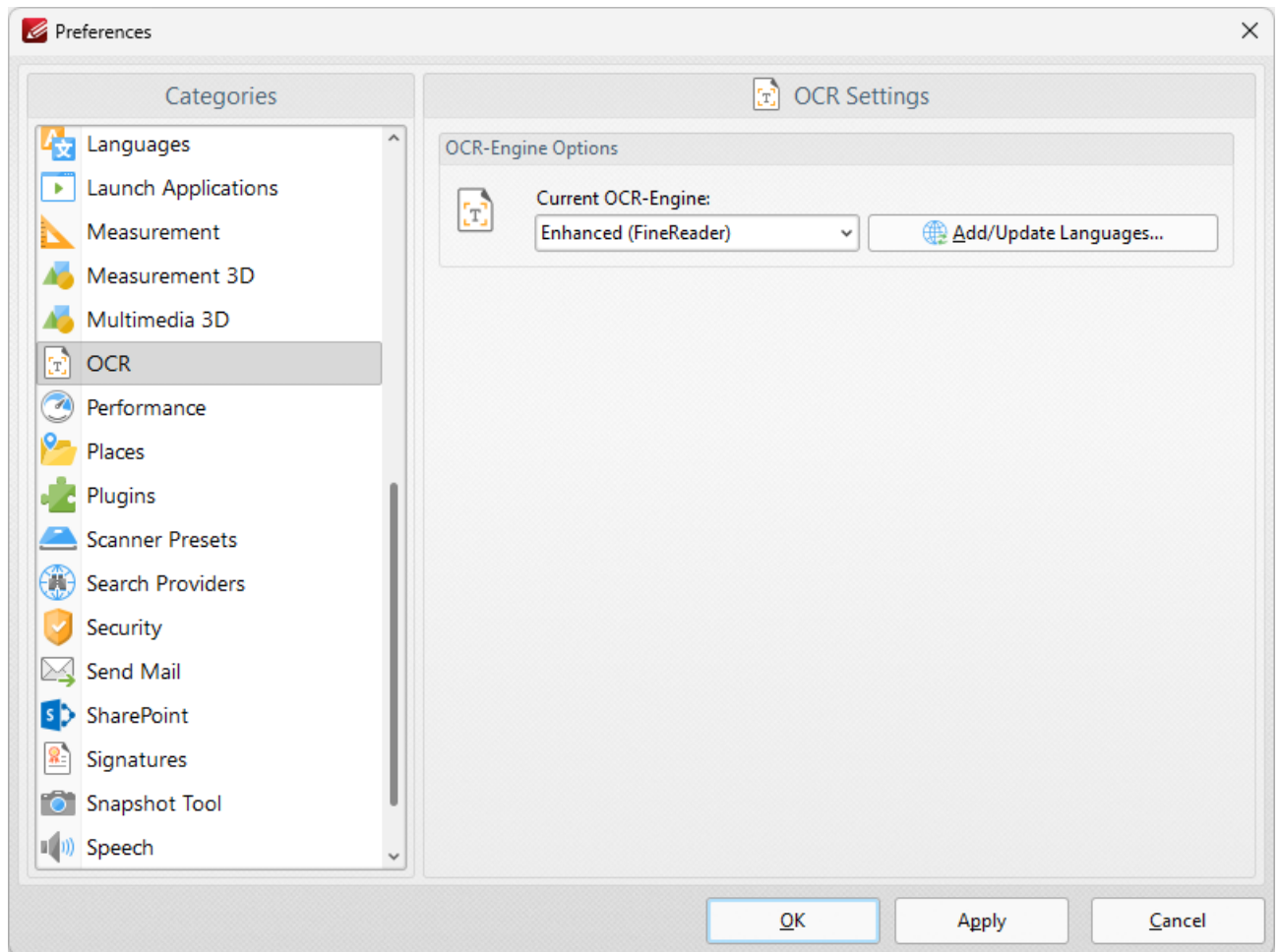
Figure 1. Preferences Dialog Box, OCR Tab Selected

Note that two optical character recognition engines are available in **PDF-Exchange Editor:** the **Default** OCR engine and the **Enhanced** OCR engine, which is available when **PDF-Exchange Editor Plus** is purchased (either as a stand-alone product or as part of the **PDF-XChange PRO** bundle). The **Enhanced** OCR engine is faster, more accurate and more dynamic than the default OCR engine, and it

also contains some extra features. Further information about the **Enhanced** OCR engine is available
here.

- Use the dropdown menu to select either the **Enhanced** or **Default** OCR engine.
- Click **Add/Update** languages to view/download/uninstall languages to use in conjunction with the OCR features of **PDF-XChange Editor.**

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.23 Performance

Performance

When the **Performance** tab is selected the following options are available:
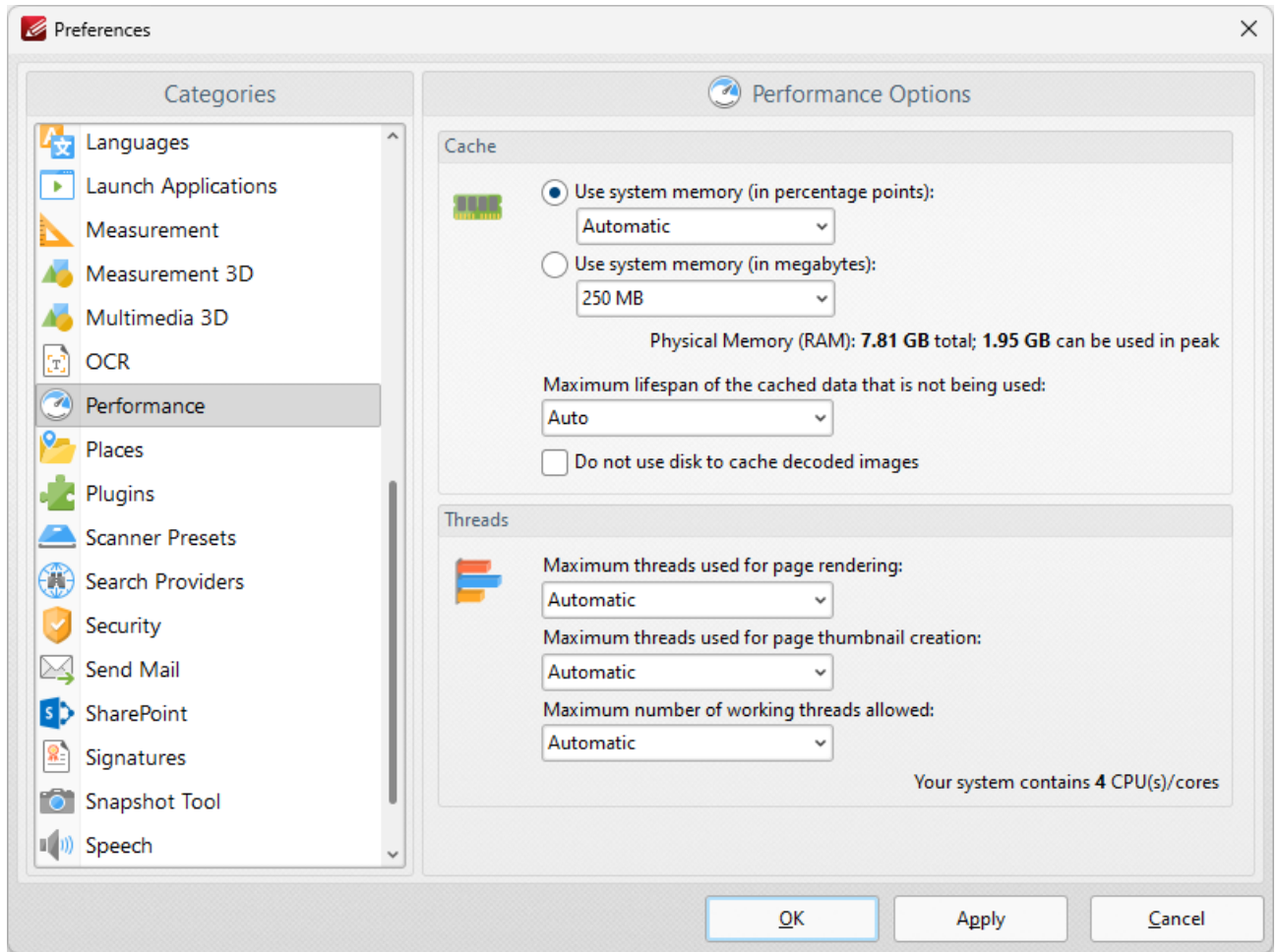
Figure 1. Preferences Dialog Box, Performance Tab Selected

- Use the **Cache** settings to determine how much system memory **PDF-XChange Editor** is permitted to use:
  - Select an option from the **Use system memory (in percentage points)** menu to set memory usage to **Automatic** or one of the listed percentages of total system memory.

- Select an option from the **Use system memory (in megabytes)** menu to set memory usage in megabytes.
- Use the dropdown menu to determine the maximum lifespan of cached data that is not being used. Note that selecting **Auto** will result in the optimal setting for your hardware.
- Please note that increasing memory usage will improve the performance of **PDF-XChange Editor,** but may also impact overall system performance.

Use the **Threads** dropdown menus to determine how many threads are used for page rendering and thumbnail creation, and the maximum amount of working threads at any given moment.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.24 Places

Places

When the **Places** tab is selected the following options are available:
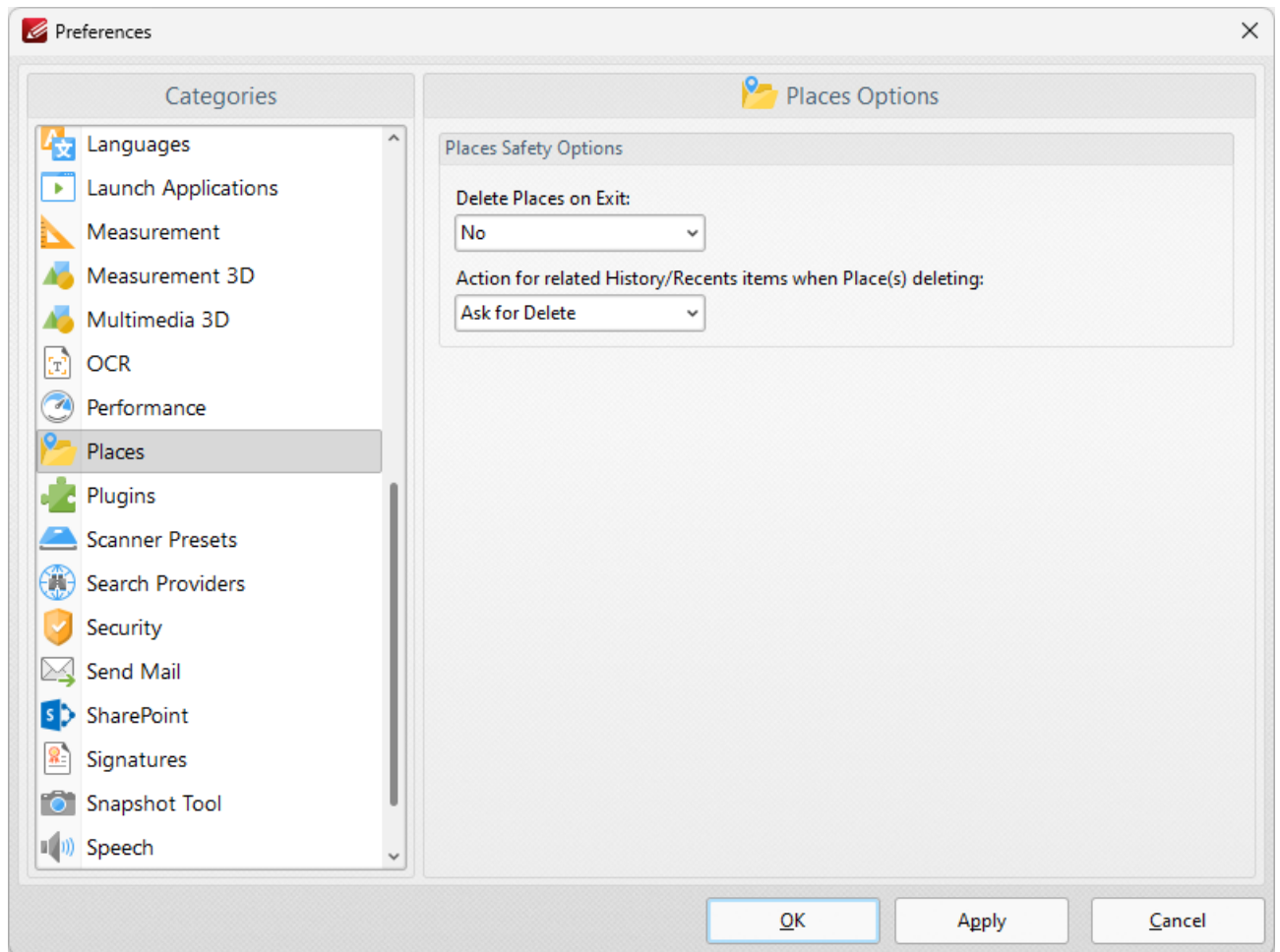
Figure 1. Preferences Dialog Box, Places Tab Selected

- Use the **Delete Places on Exit** dropdown menu to determine what happens to places when **PDF-XChange Editor** is closed:
    - **No** retains all places when **PDF-XChange Editor** is closed.
    - **All** deletes all places when **PDF-XChange Editor** is closed.

- **Only Newly Added** deletes only places that have been recently added when **PDF-XChange Editor** is closed.
- Use the **Action for related History/Recents items when Place(s) deleting** dropdown menu to determine what happens to items in the history/recents lists when the places from which they came are deleted:
    - **Ask for Delete** displays a message and prompts the user for action to take.
    - **Delete** means that associated items will be removed from the History/Recents lists.
    - **Keep** means that associated items will be retained in the History/Recents lists.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.25 Plugins

Plugins

When the **Plugins** tab is selected the following options are available:
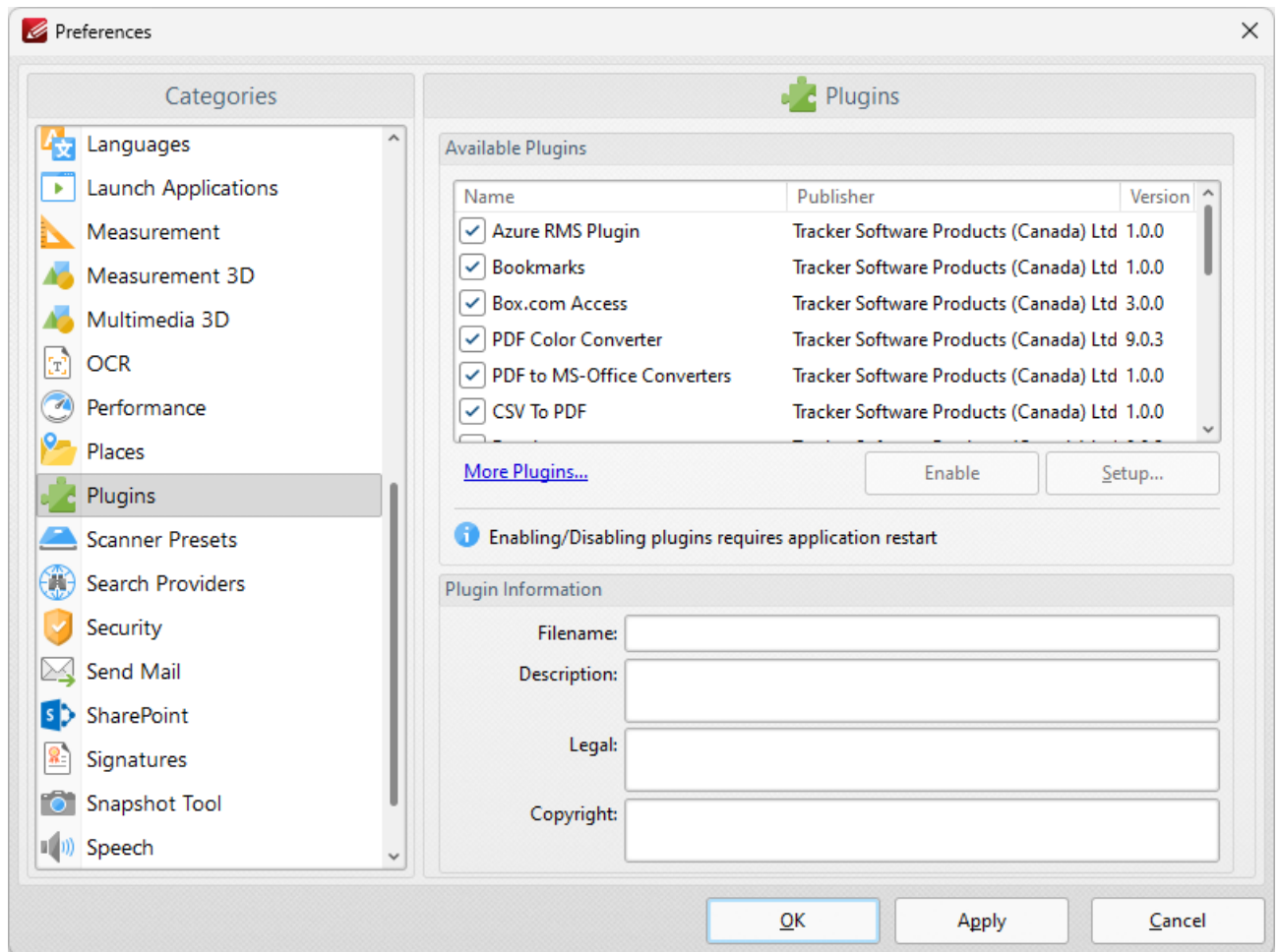
Figure 1. Preferences Dialog Box, Plugins Tab Selected

This dialog box shows plugins available for **PDF-XChange Editor:**

- Select plugins to view their details in the **Plugin information** section. The following plugins are available:

- **Azure RMS Plugin** - the plugin for handling PDF files protected by **MS Azure RMS.**
- **Bookmarks Plugin** – the plugin that facilitates the inclusion of advanced functionality for bookmarks.
- **Box.com Access Plugin** – the plugin that enables working with files located on **Box.com.**
- **PDF Color Converter Plugin** – the plugin that enables the conversion of colors in PDF documents.
- **PDF to MS-Office Converters Plugin** – the plugin that allows the conversion of documents into **MS Office** formats.
- **CSV to PDF Plugin** – the plugin that enables the conversion of .csv files to tables in PDF documents.
- **DropBox Plugin** – the plugin that enables the software to work in conjunction with files located on the **Dropbox** cloud.
- **Enhanced OCR (FineReader) Plugin** – facilitates the use of the enhanced OCR features.
- **File Open Client Plugin** – the security plugin that handles **FileOpen DRM.**
- **Google Drive Access Plugin** – the plugin that allows the software to work with files located on **Google Drive** cloud storage.
- **Identify Form Fields Plugin** - the plugin that enables the identification and conversion of form fields.
- **Markdown to PDF Plugin** – the plugin that enables the conversion of Markdown files into PDF documents.
- **OCR Plugin** – facilitates the use of the default OCR features.
- **OneDrive Access Plugin** – the plugin that enables working with files located on **Microsoft OneDrive.**
- **PDF/A Converter Plugin** – the plugin that converts PDF files into PDF/A format.
- **PDF Optimizer Plugin** – the plugin that optimizes PDF files.
- **Read Out Loud Plugin** – the plugin that provides read-out-loud functionality.
- **Sanitize Plugin** – the plugin that enables the sanitization of documents.
- **SharePoint Plugin** – the plugin that allows the software to work with files located on **Sharepoint/Office 365** servers.
- **Spell Checker Plugin** – the spell-checker plugin.
- **U3DPlugin** – the plugin that enables the viewing of embedded 3D content in PDF documents.
- Click the **Enable/Disable** buttons to enable/disable selected plugins.
- Click **More Plugins** to view further information about plugins from **PDF-XChange.**

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.26 Scanner Presets

![PDF-XChange Editor icon]**Scanner Presets**

When the **Scanner Presets** tab is selected the following options are available:
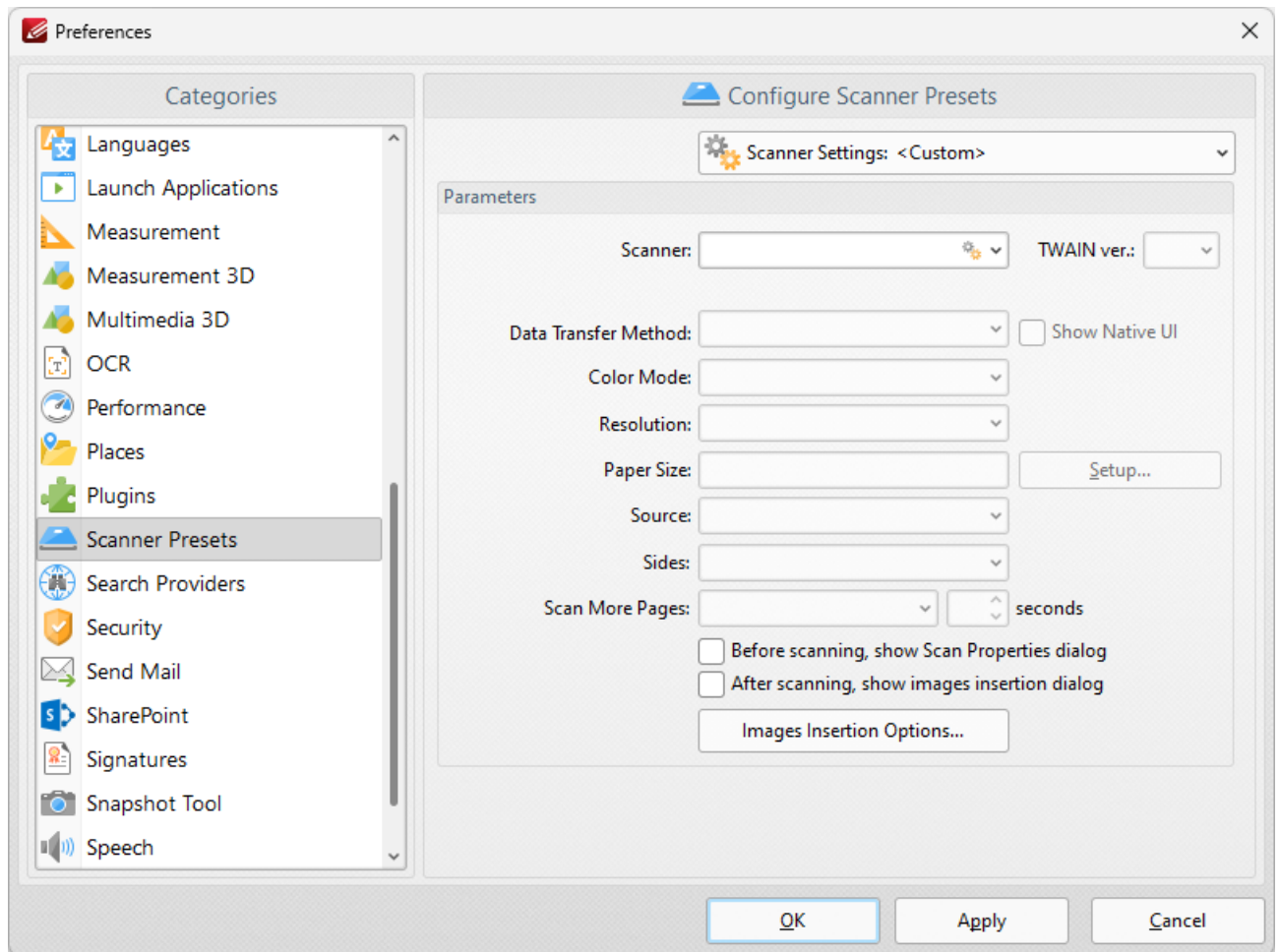
Figure 1. Preferences Dialog Box, Scanner Presets Tab Selected

These settings determine the presets for scanning:

- Click the **Scanner Settings** menu to select a preset scanning mode or a saved profile.
- Click the **Scanner** menu to select a scanner to use.

- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode:**
  - **Native Mode** uses a single memory buffer. This is the default and fastest mode, and is compatible with the broadest range of scanners.
  - **Memory Mode** enables the use of multiple memory buffers. This is a useful function in cases where memory is low and/or when large images are being scanned.
- The **Show Native UI** box is selected by default, which means the user interface of the device driver is used. This is the most reliable option, and the scanner will select certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the **Show Native UI** box to customize these options:
  - **Color Mode** has four options: **Auto detect, Color, Grayscale** and **Black & White.**
  - 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:
    - **Automatic** determines the paper size automatically.
    - **Standard** contains standard sizes such as those used by the **ISO** and **ANSI**.
    - **Custom** can be used to enter custom dimensions.
  - **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner used for scanning.
- 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 dropdown arrow for an explanation of these options.
- Click the **Scan More Pages** menu to select the setting for when additional pages are scanned.
- Select the **Before scanning, show Scan Properties dialog** box to view/edit scan properties before scans take place.
- Select the **After scanning, show images insertion dialog** box to view/edit the images insertion dialog box after the scan has taken place. This dialog box enables image customization.
- Click the **Images Insertion Options** button to determine further options for inserted images. Those options are explained **here.** [141]

Use the **Scanner Settings** menu to save custom settings. 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 and **OK** to save changes.

5.2.11.27 Search Providers

Search Providers

When the **Search Providers** tab is selected the following options are available:
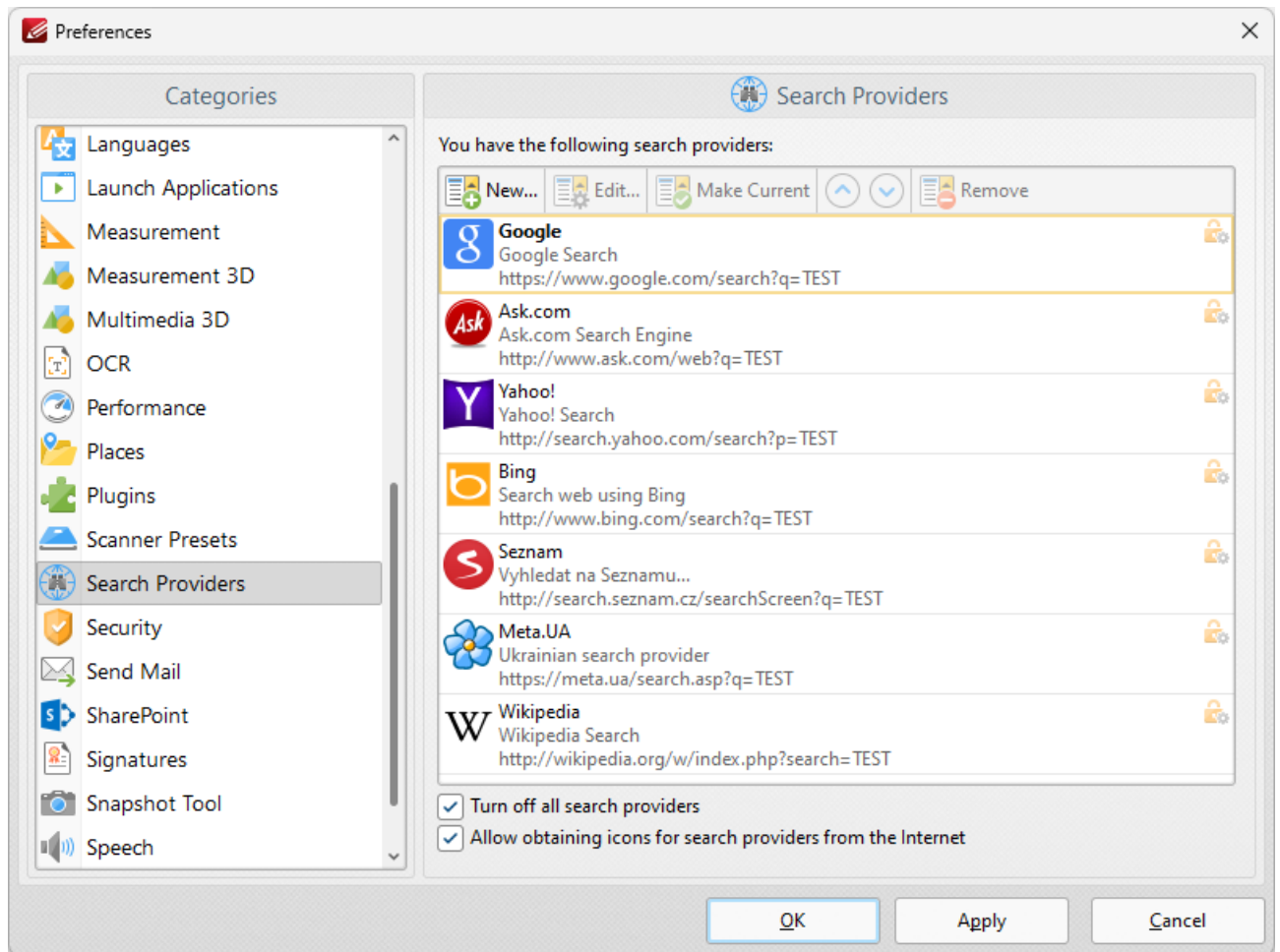
Figure 1. Preferences Dialog Box, Search Providers Tab Selected

This pane displays a list of available search providers.

- Click **New** to add a new search provider, then follow the on-screen instructions.
- Click **Edit** to edit the selected search provider.

- Click **Make Current** to set the selected search provider as the default search provider.
- Use the arrows to move the selected search provider up or down in the display window.
- Click **Remove** to remove the selected search provider.
- 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 and **OK** to save changes.

5.2.11.28 Security

PDF **Security**

When the **Security** tab is selected the following options are available:
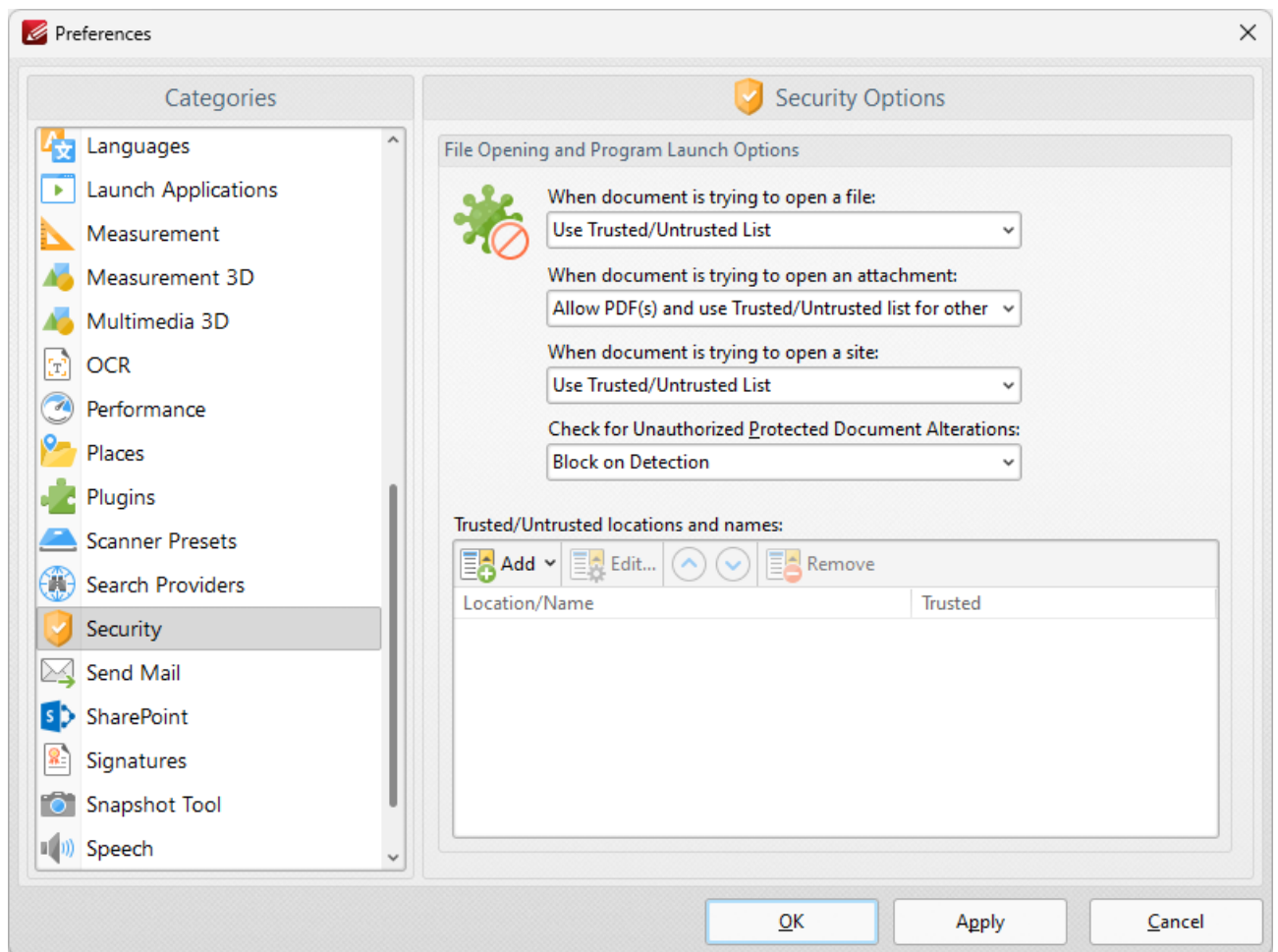
Figure 1. Preferences Dialog Box, Security Tab Selected

The **Security** settings are used to determine the actions that **PDF-XChange Editor** takes when documents attempt to open files/attachments/sites:

- 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. The [Attachments pane](524) can be used to open attachments when this option is enabled.
    - **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 a file/attachment is not specified in the list then **PDF-XChange Editor** will prompt before opening it.

- There are three 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 in the list then **PDF-XChange Editor** will prompt before opening it.
    - **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:
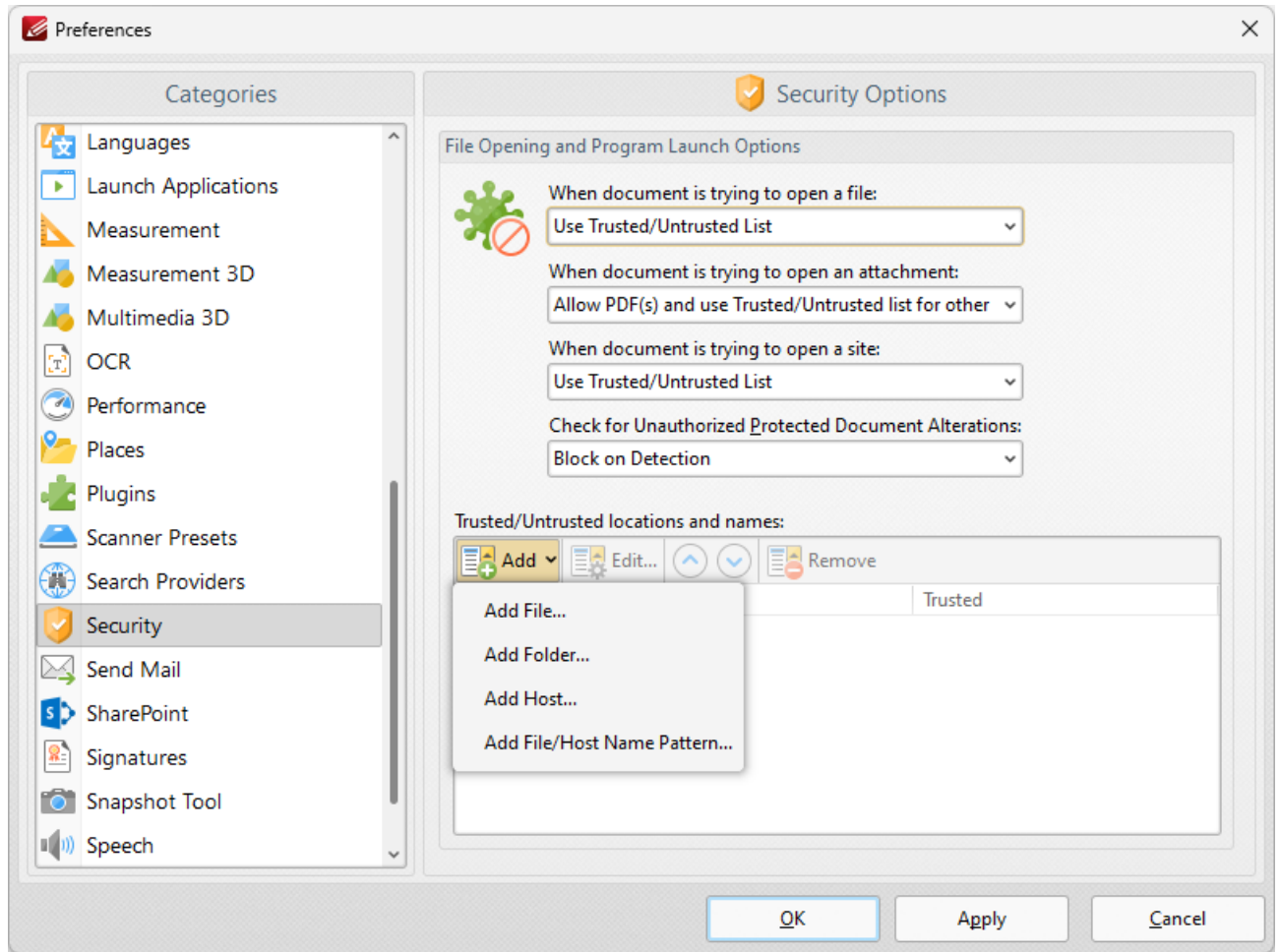
Figure 2. Add Trusted/Untrusted Options

- 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.

Click **Apply** to apply changes and **OK** to save changes.

Additional security options are available **here.** [188]

5.2.11.29 Send Mail

Send Mail

When the **Send Mail** tab is selected the following options are available:
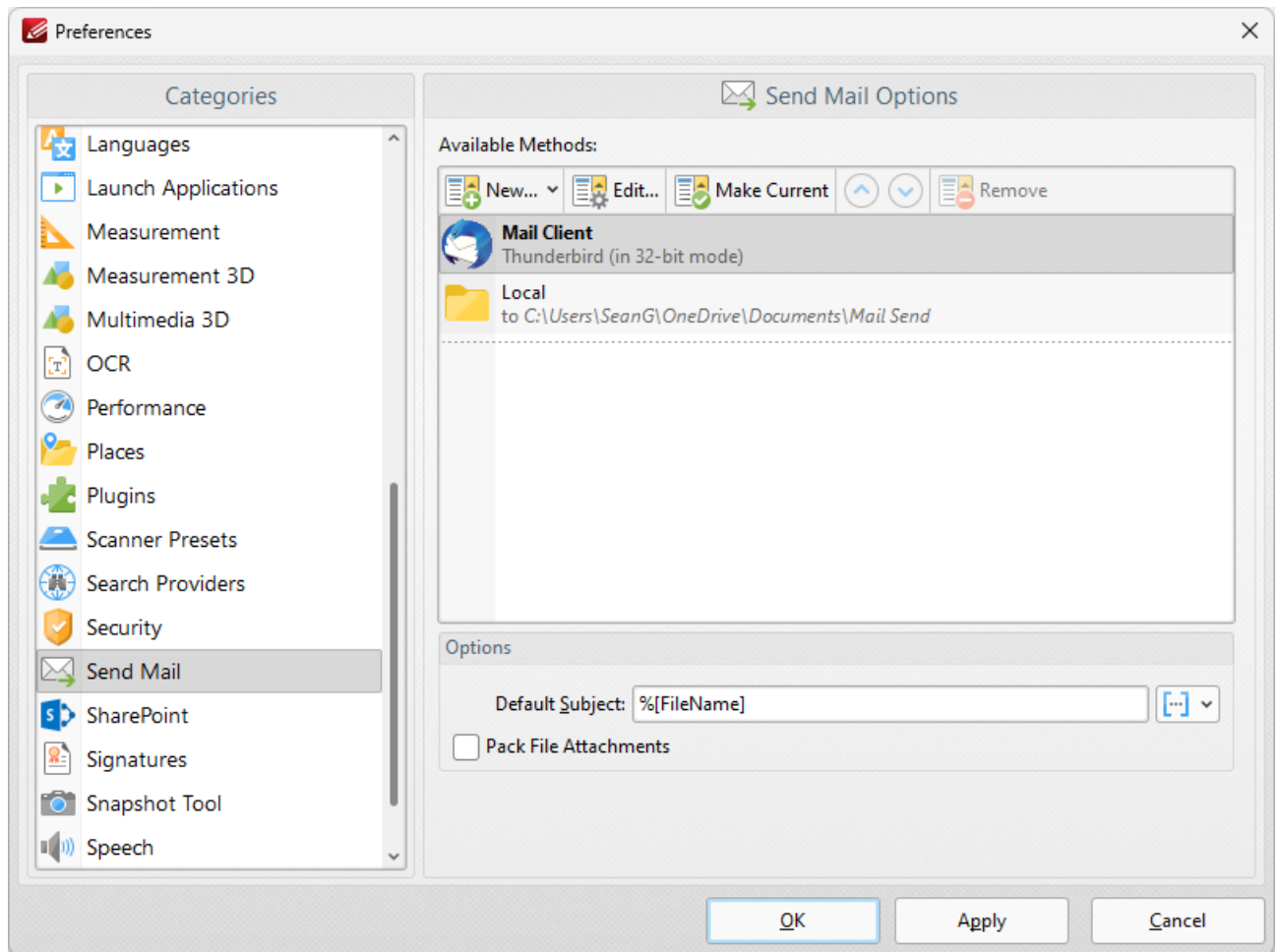
Figure 1. Preferences Dialog Box, Send Mail Tab Selected

These settings determine parameters for the **Send by Email** [159] feature of **PDF-XChange Editor.** Existing email methods are displayed in the **Available Methods** pane.

- Click **New** to add new email methods. Select **Custom SMTP, Yahoo SMTP, Hotmail SMTP, Outlook SMTP, GMX SMTP, Mail.ru SMTP, GMail Webmail, Outlook Webmail** or **GMail Send** as desired. Please note that the **GMail Send** option operates via **GMail** SMTP and does not open your webmail when the **Send by Email** 159 feature is used. It uses your **GMail** credentials to email silently via Google's SMTP, which requires SMTP to be enabled in your **GMail** account, as detailed **here.**
- Click **Edit** to edit selected email methods.
- Click **Make Current** to enable the selected email method.
- Click **Remove** to remove the selected email method.
- Use the **Default Subject** text box to determine an automated subject line of emails. **Macros** 1157 are enabled for this option.
- Select the **Pack File Attachments** box to pack email attachments as **ZIP** files.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.30 SharePoint

SharePoint

When the **SharePoint** tab is selected the following options are available:

Figure 1. Preferences Dialog Box, SharePoint Tab Selected

Use the dropdown menus and check boxes to determine parameters as desired, then click **Apply** to apply changes and **OK** to save changes.

5.2.11.31 Signatures

Signatures

When the **Signatures** tab is selected the following options are available:
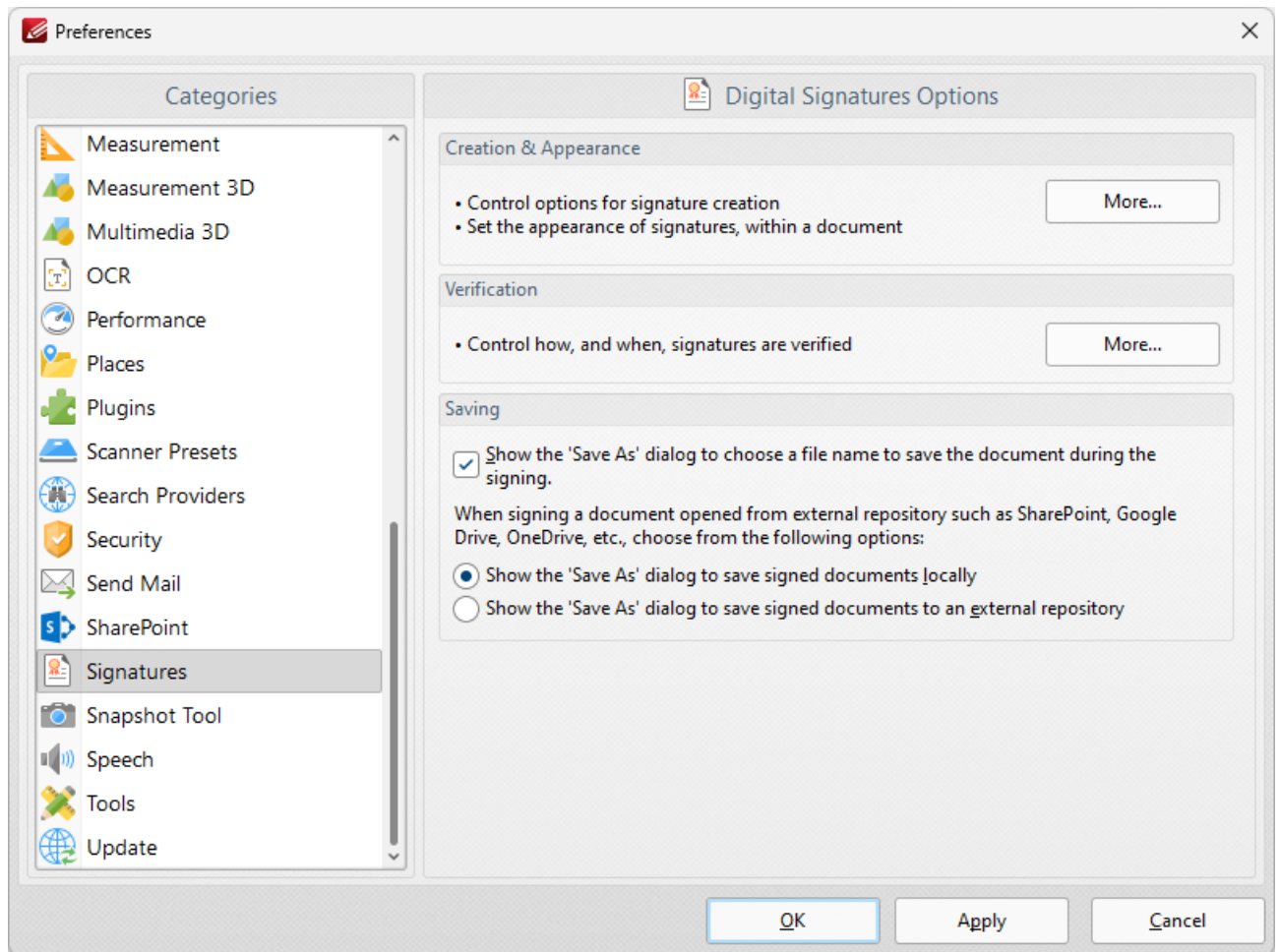
Figure 1. Preferences Dialog Box, Signatures Tab Selected

These options determine the settings for digital signatures:

- The **Creation & Appearance** settings determine the options detailed in *(figure 2)* below. Click **More** to access these settings.

- The **Verification** settings determine how and when signatures are verified. Click **More** to access these settings, then select the check boxes as desired.
- Select the "**Show Save As...**" box to enable/disable the display of the **Save As** dialog box when signing documents. Select one of the radio buttons below the check box to determine when the **Save As** dialog box is displayed.
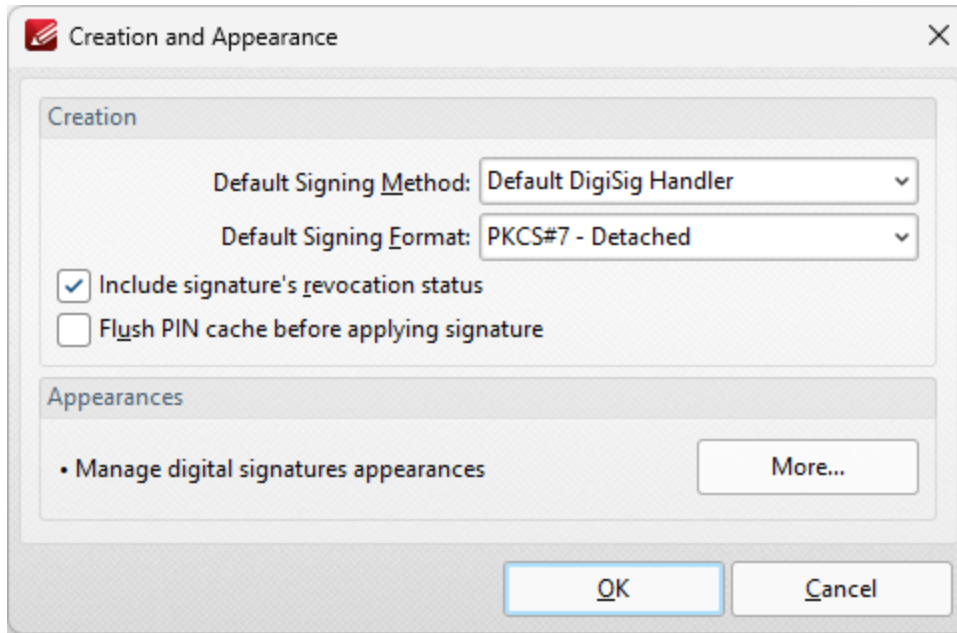
Figure 2. Creation and Appearance Dialog Box

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. The revocation status of the signature will be shown in the main window when this option is enabled. Signatures are long-term validation enabled when this option is selected.
- Select the **Flush PIN cache before applying signature** box as desired.
- Click the **More** button to set the **Digital Sign Appearance Templates:**

Figure 3. Digital Signature Appearance Templates Dialog Box

- Select signature templates, then select **Clone/Reset/Edit** as desired:
- Click **Clone** to clone the selected signature template. This is a useful feature if parameters of existing signature templates need to be changed and saved without editing the original template.
- Click **Reset** to revert the values of the the selected signature template to its default state.
- Click **Edit** to adjust the values of the selected signature template:

Figure 4. Edit Template of Digital Sign Dialog Box

- Use the **Template Name** text box to edit the name of the signature template.
- Use the **Icon** dropdown menu to specify the icon used with the signature, and use the adjacent **Font** dropdown menu to specify the font used.
- Use the **Background Logo** dropdown menu to specify the logo used with the signature, and use the adjacent **Opacity** number box to specify the transparency level of the background.
- Use the **Display Text** check box options to specify the text that is displayed with the signature.

Click **OK** to save changes.

5.2.11.32 Snapshot Tool

Snapshot Tool

The **Snapshot Tool** is used to take snapshots of the active document, as detailed **here.** 809 When the **Snapshot Tool** tab is selected the following options are available:
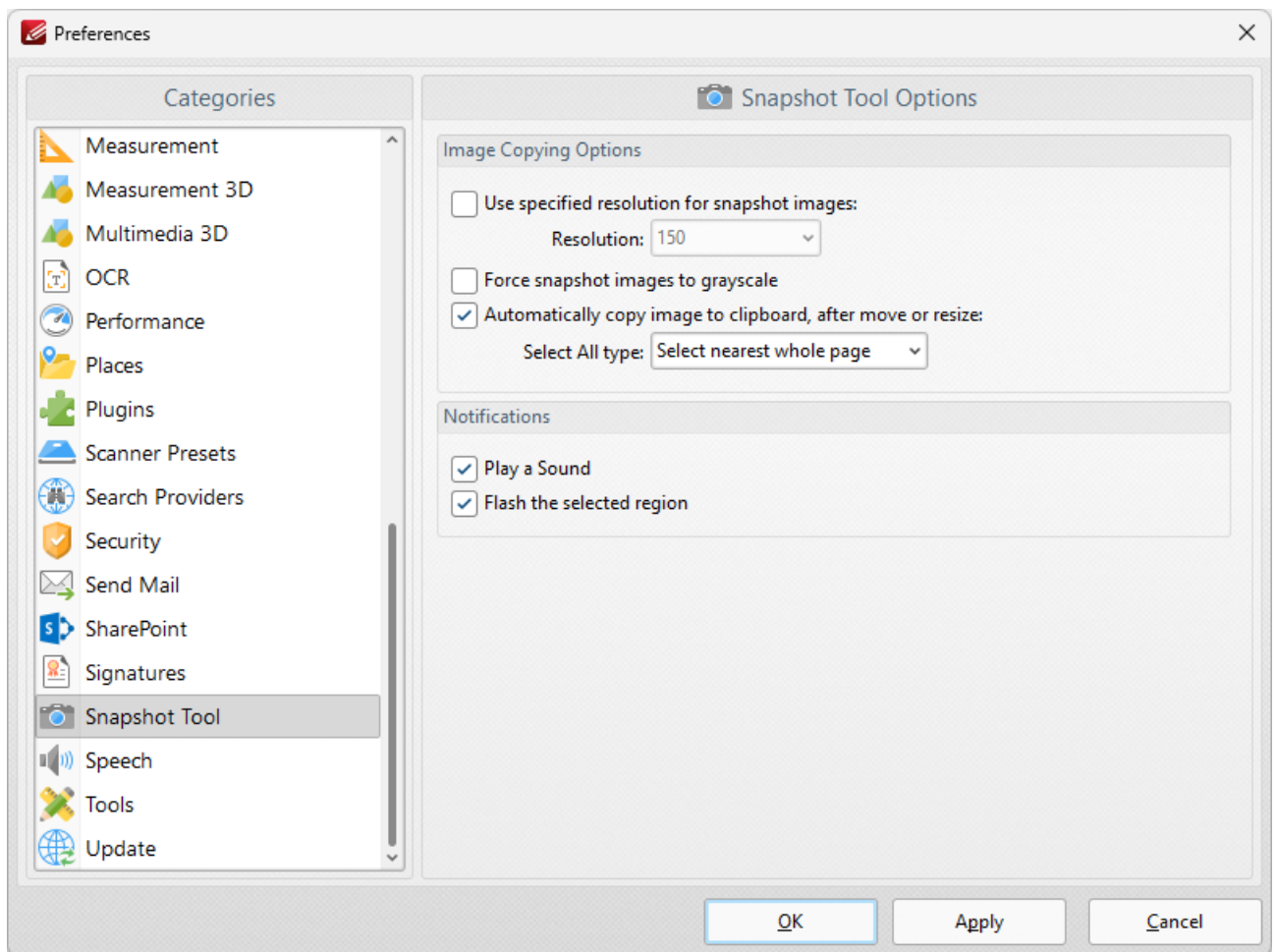
Figure 1. Preferences Dialog Box, Snapshot Tool Tab Selected

The **Image Copy Options** determine the settings for images that the **Snapshot** tool produces:

- Use the **Resolution** dropdown menu to specify the image resolution for snapshots.

- 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** dropdown menu to determine the **Select All** setting. This option is available in the right-click context menu when the **Snapshot Tool** is selected. The options are:
  - **Select nearest whole page,** which takes a snapshot of the nearest whole page.
  - **Select visible portion of nearest page,** which takes a snapshot of the visible portion of the nearest page.
- Select the check boxes in the **Notifications** section as desired.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.33 Speech

Speech

When the **Speech** tab is selected the following options are available:
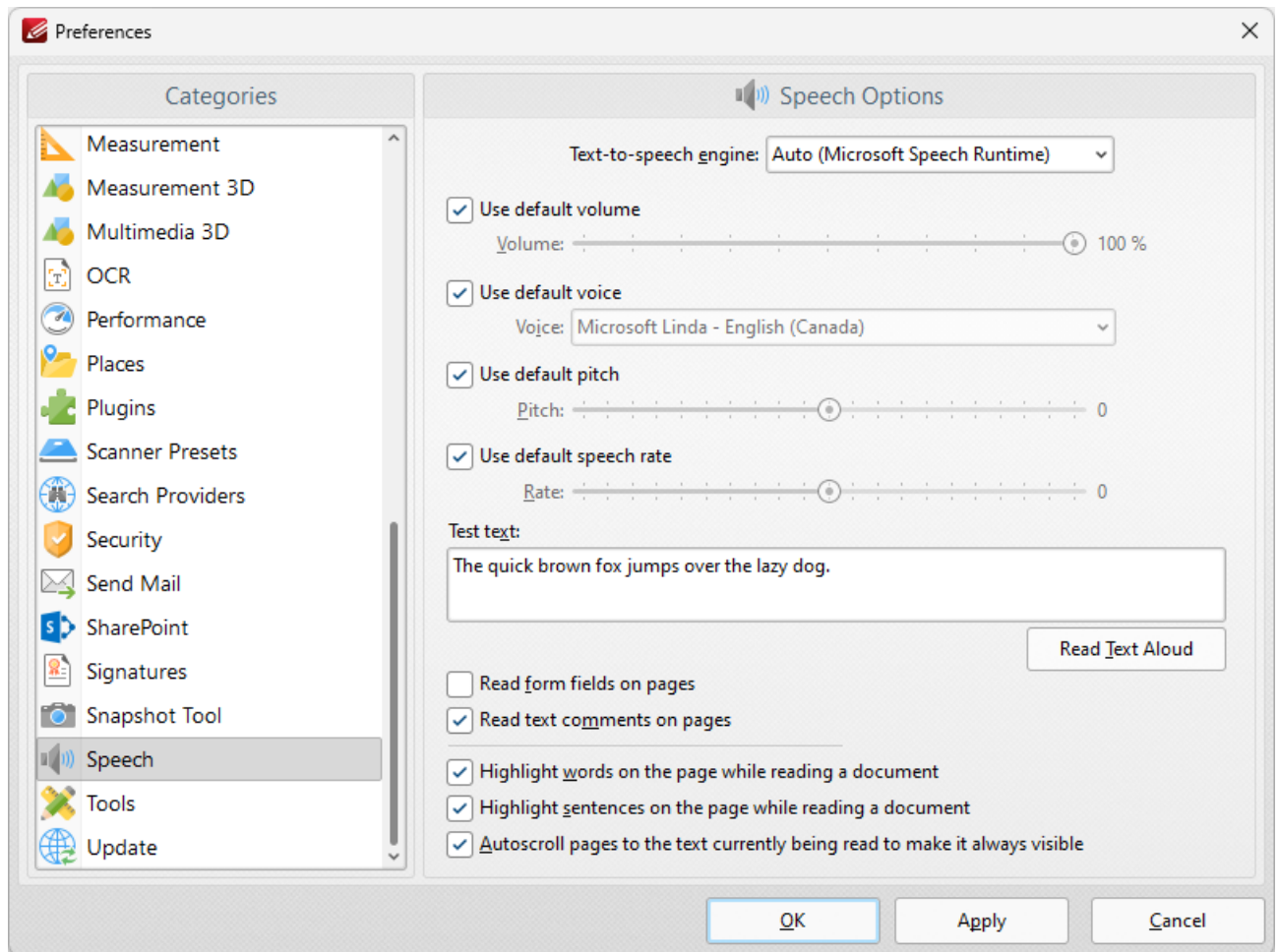
Figure 1. Preferences Dialog Box, Speech Tab Selected

These settings determine the options for the read out loud feature of **PDF-XChange Editor:**

- Select the **Use default voice** box as desired. Clear this box to choose an alternative voice from the **Voice** menu.

- Select the **Use default speech attributes** box as desired. Clear this box to adjust the **Pitch** and **Rate** settings.
- 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 **Read this text** to test settings.

Instructions on how to use the **Read Out Loud** feature are available <u>here.</u> 1275

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.34 Tools

Tools

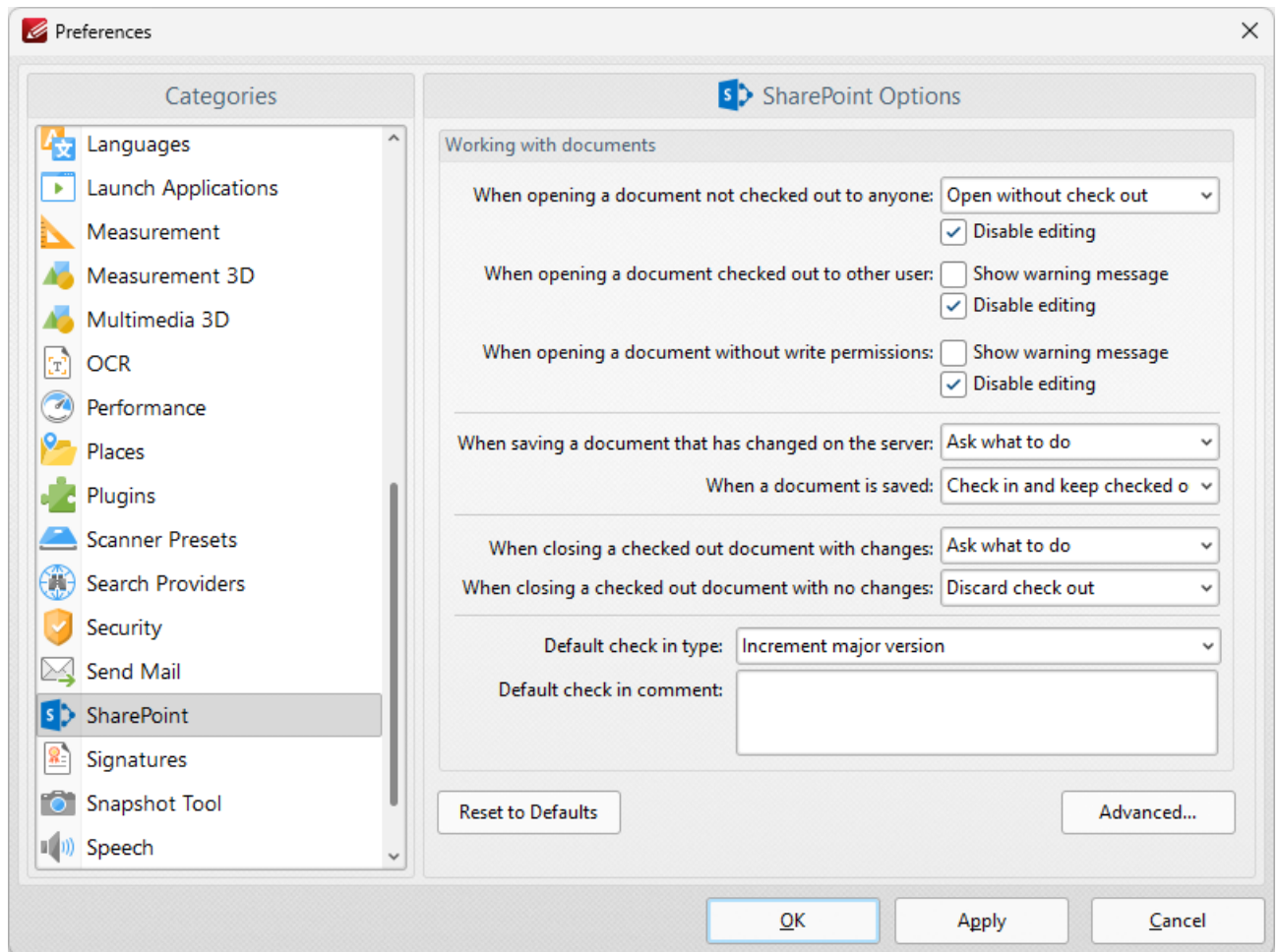When the **Tools** tab is selected the following options are available::
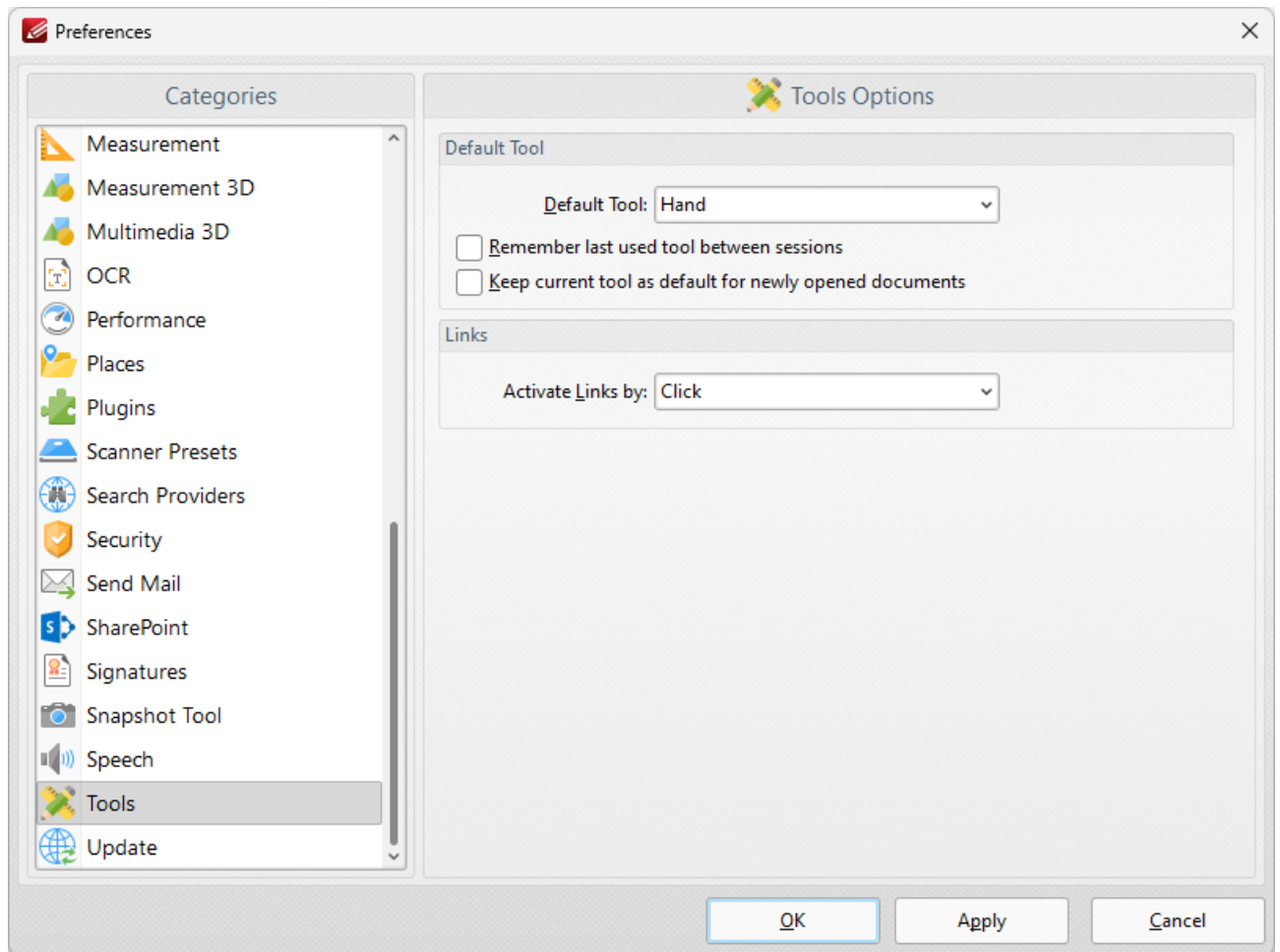
Figure 1. Preferences Dialog Box, Tools Tab Selected

- Use the **Default Tool** menu to select the default tool in **PDF-XChange Editor.**
- Select the upper check box to retain the active tool between sessions.
- Select the lower check box to retain the active tool when new documents are opened.

Click **Apply** to apply changes and **OK** to save changes.

5.2.11.35 Update

Update

The **Update** tab is used to check for software updates:
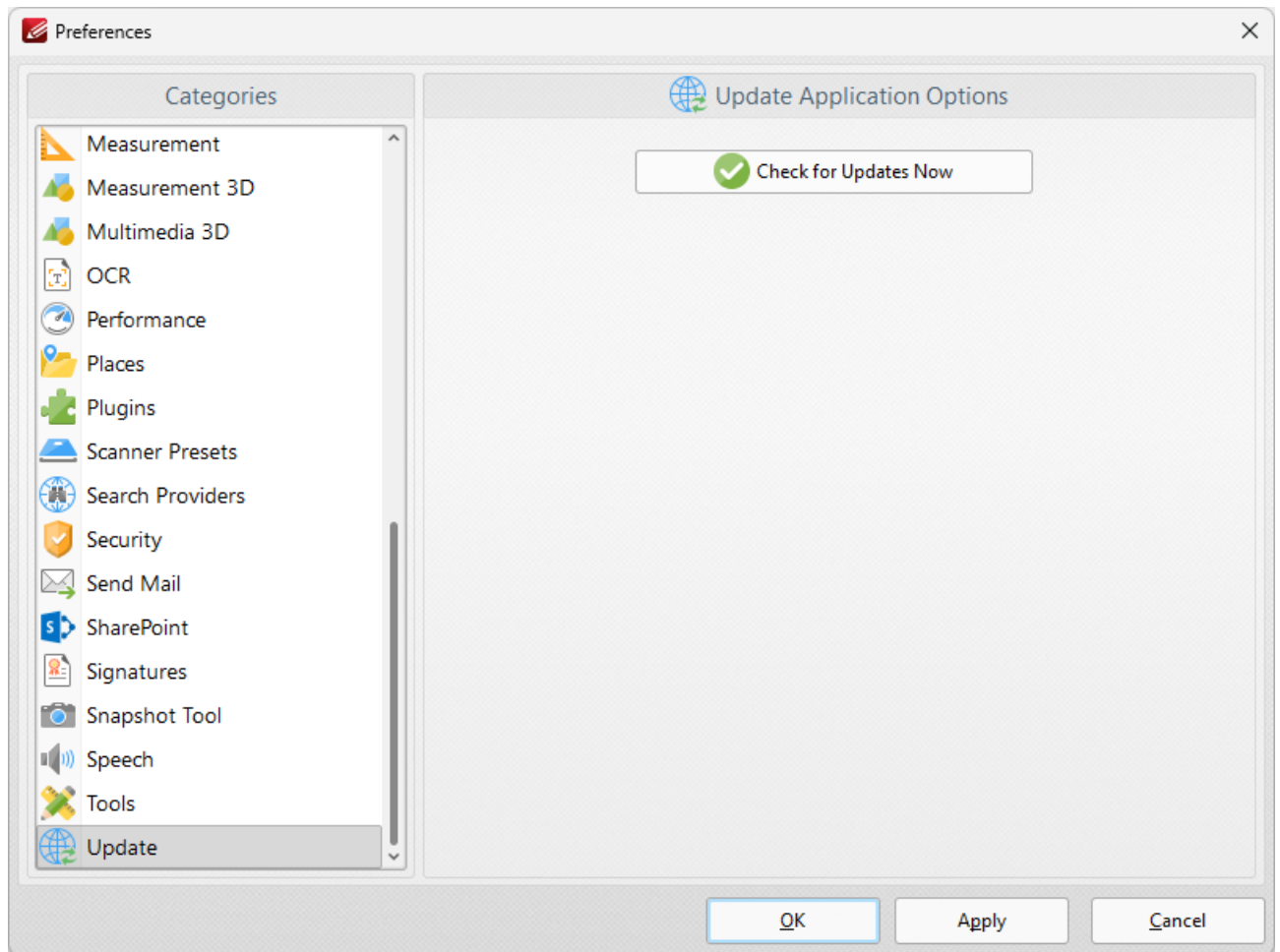
Figure 1. Preferences Dialog Box, Update Tab Selected

Click **Check for Updates Now** to search for updates.

5.3 View

View

When the **View** tab is selected, the following options are available:

Figure 1. View Tab Submenu

These options determine the settings for the elements of **PDF-XChange Editor** detailed below:

- Click **Toolbars** 314 to view/edit the current settings for toolbars and to create customized toolbars.
- Click **Rotate View** 503 to rotate the view of the current document.
- Click **Bookmarks** 504 to open the **Bookmarks** pane.
- Click **Thumbnails** 510 to open the **Thumbnails** pane.
- Click **Other Panes** 517 to open other editing panes in **PDF-XChange Editor.**
- Click **Page Layout** 606 to view/edit page layout options.
- Click **Zoom** 608 to determine zoom settings for viewing documents.
- Click **Show** 610 to enable/disable additional tools for viewing documents, and to view/edit JavaScript settings.
- Click **Snap** 615 to view snapping options to assist in document editing.
- Click **Go To** 620 to avail of convenient navigation options for navigating documents.
- Click **Portfolio** 622 to avail of options for PDF portfolio files.
- Click **Compare Documents** 627 to launch the feature for comparing documents.
- Click **Full Screen Mode** 630 to enable full screen mode.

5.3.1   Toolbars

Toolbars

Hover over **Toolbars** to determine toolbar settings:
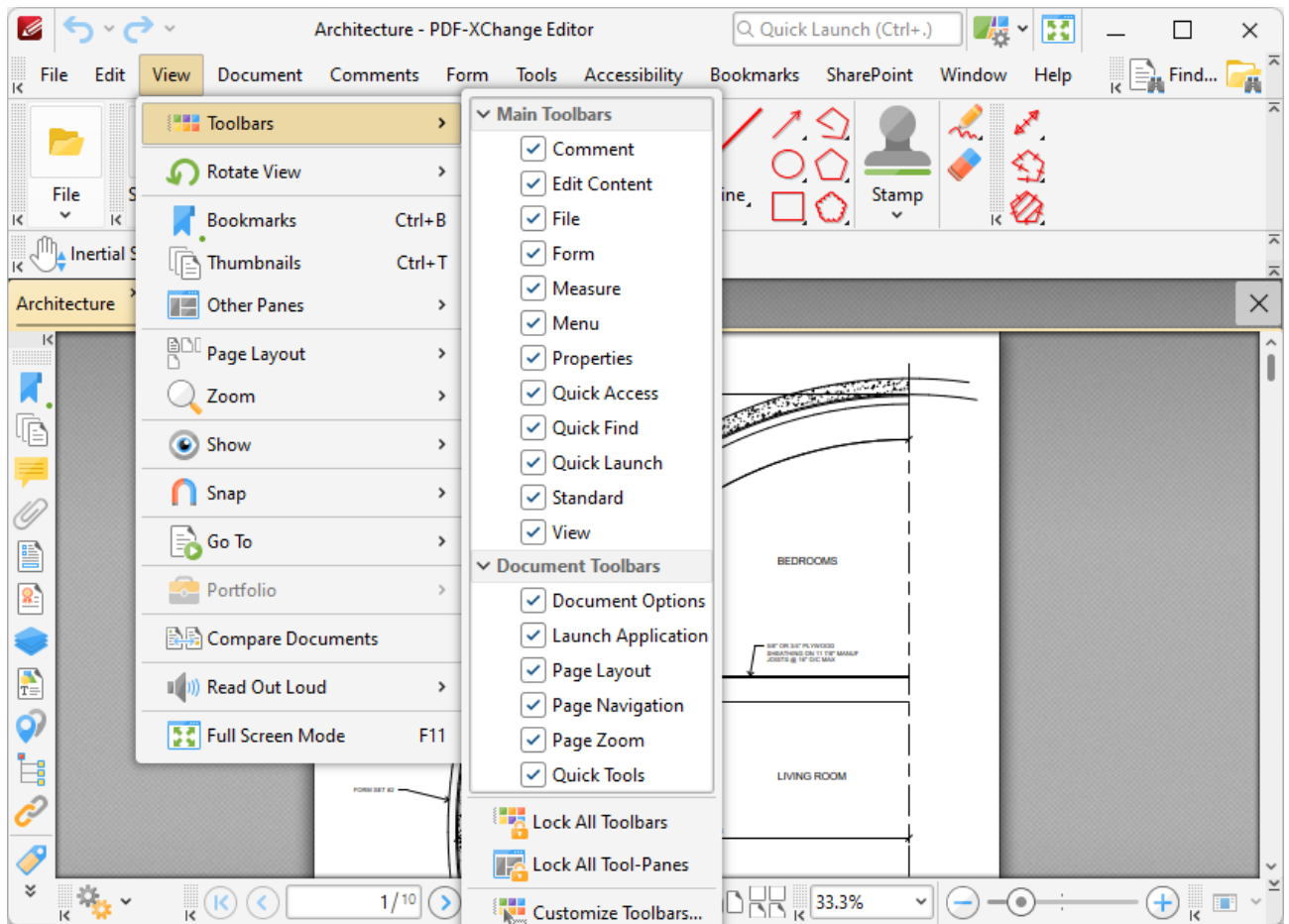
Figure 1. View Tab Submenu, Toolbars Options

The toolbars in **PDF-XChange Editor** provide a convenient way to access the features and functions of the application:

- Select/clear the boxes detailed in *(figure 1)* to show/hide the respective toolbars.
- Click **Lock All Toolbars** to lock all toolbars, which disables their customization.

- Click **Lock All Tool-panes** to lock all tool-panes, which disables their toggling/resizing.
- Click **Customize Toolbars** to customize toolbars. Those options are explained **here.** [492]
- Press F8 to show/hide all toolbars.
- Note that there are two icons on the left of each toolbar:
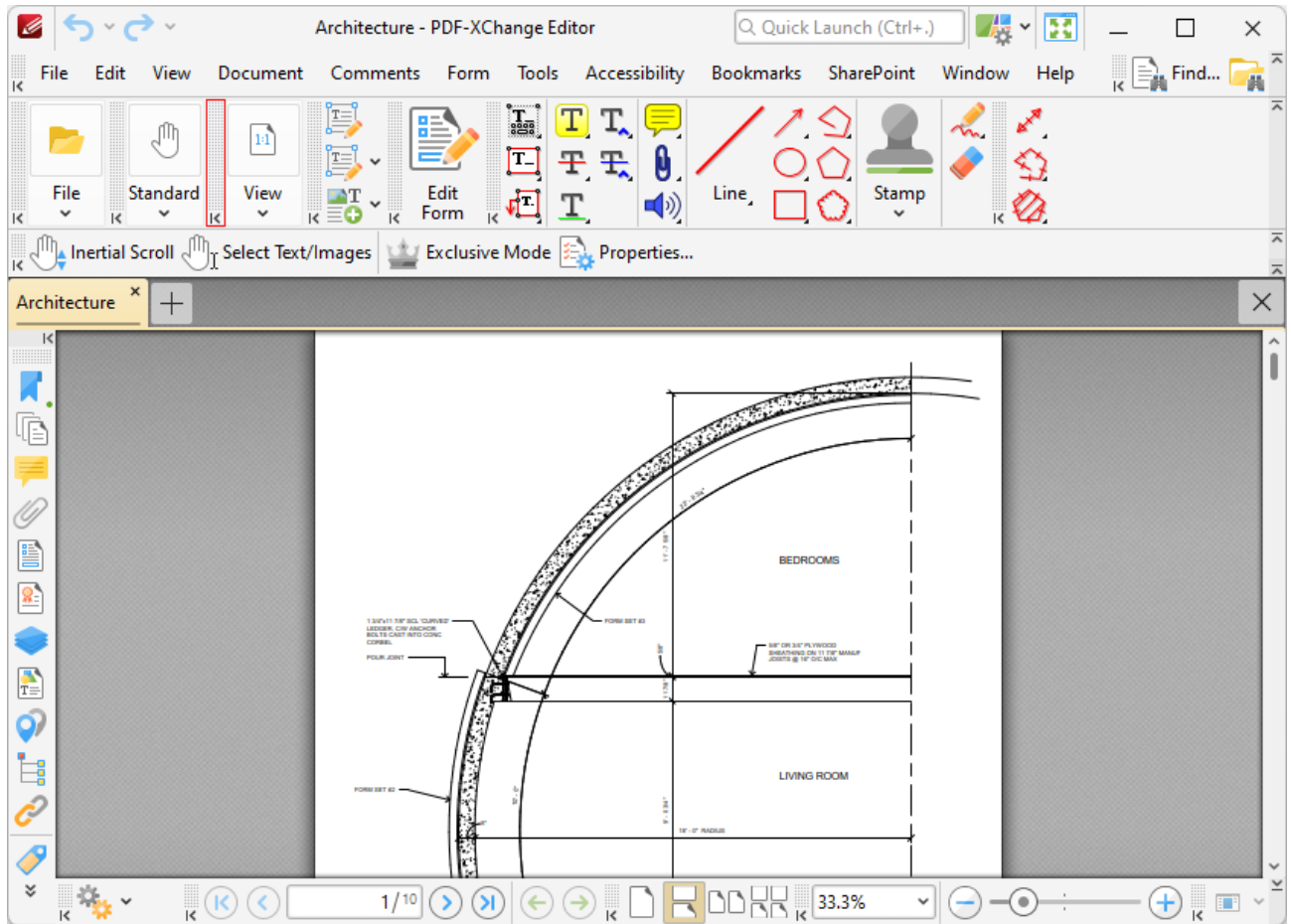
Figure 2. Toolbar Icons

- Click the arrow icon to expand/collapse toolbars.
- Hover the pointer over the dotted area above the arrow icon to reposition toolbars. The pointer will change to a four-way arrow. Click and drag to detach and move toolbars. (Please note that the **Document Toolbars**, located on the lower section of the main window, have fewer repositioning options than the other toolbars).
- If toolbars are dragged over specific areas in the **PDF-XChange** workspace then the icon beneath the pointer will change. This indicates that the toolbar can be docked to the interface. For example in *(figure 3)* the **View Toolbar** has been docked to the lower part of the workspace:

Figure 3. PDF-XChange Editor Main Window, View Toolbar Repositioned
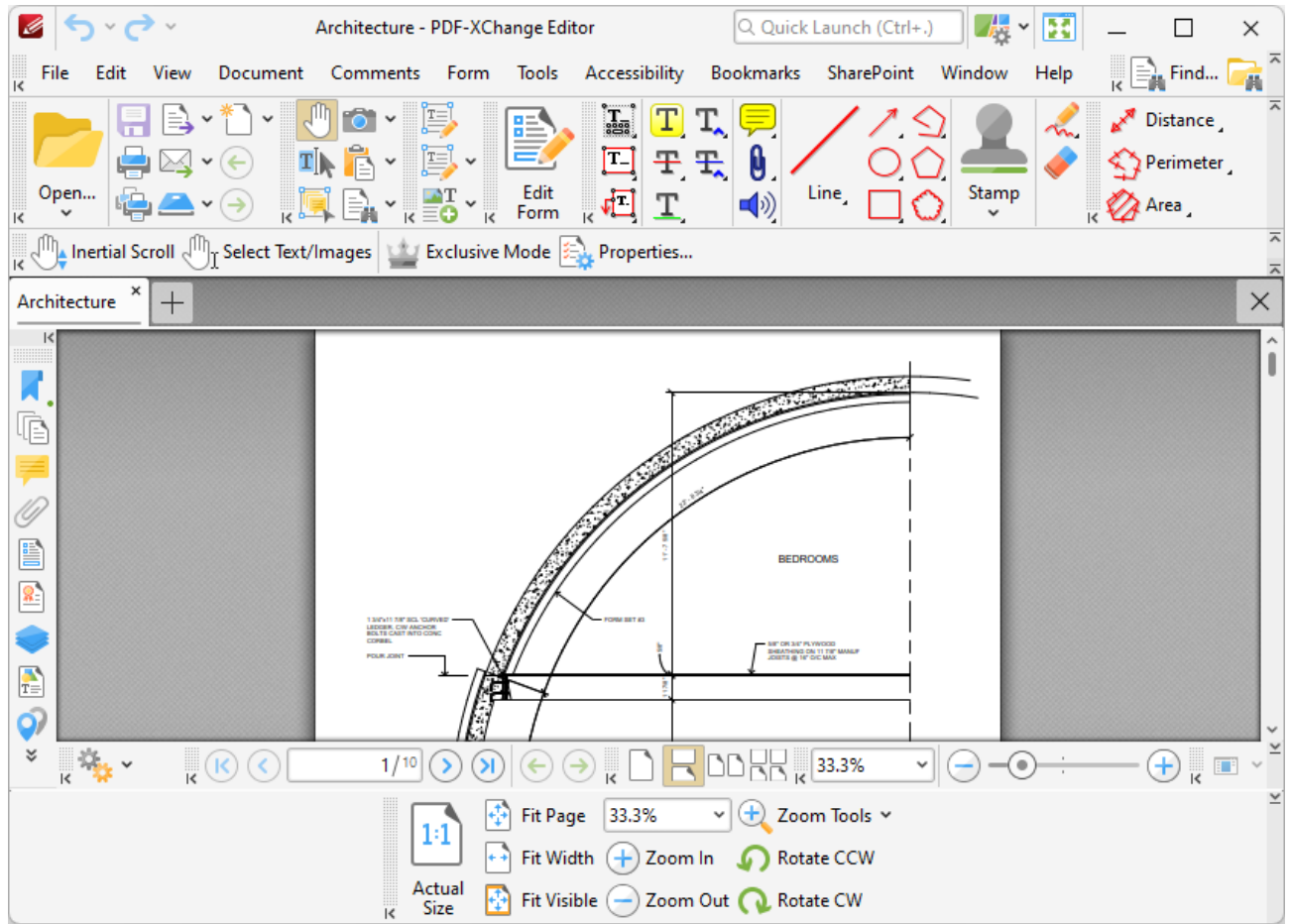
5.3.1.1 Comment Toolbar

Comment Toolbar

The **Comment Toolbar** contains options for adding comments and annotations to documents:
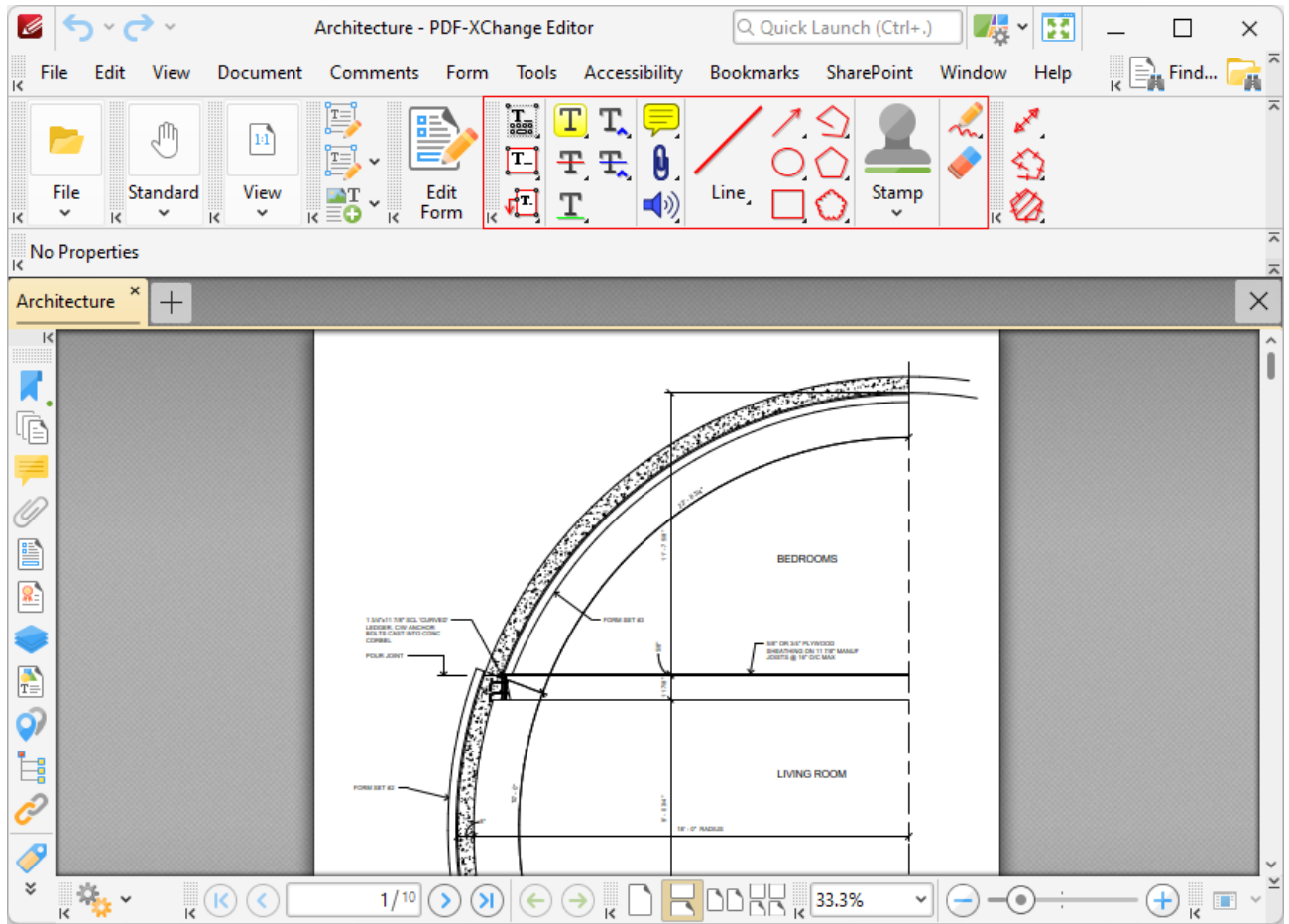
Figure 1. Comment Toolbar

 The **Typewriter** tool is used to create typewriter comments. See **here** 854 for further information.

 The **Text Box** tool is used to create text boxes. See **here** 859 for further information.

The **Callout** tool is used to create callout annotations. See **here** 864 for further information.

The **Highlight Text** tool is used to highlight text. See **here** 869 for further information.

The **Strikeout** tool is used to strike out text. See **here** 873 for further information.

The **Underline** tool is used to underline text. See **here** 877 for further information.

The **Insert Text** tool is used to add caret annotations that indicate text should be inserted, as detailed **here.**

The **Replace Text** tool is used to add caret annotations that indicates text should be inserted, as detailed **here.**

The **Sticky Note** tool is used to create sticky note annotations. See **here** 849 for further information.

The **Attach File** tool is used to create links to documents. See **here** 960 for further information.

The **Sound** tool is used to add audio files to the active document. See **here** 964 for further information.

The **Line** tool is used to create line annotations. See **here** 899 for further information.

The **Arrow** tool is used to create arrow annotations. See **here** 899 for further information.

The **Oval** tool is used to create oval annotations. See **here** 916 for further information.

The **Rectangle** tool is used to create rectangle annotations. See **here** 911 for further information.

The **Polyline** tool is used to create polyline annotations. See **here** 921 for further information.

The **Polygon** tool is used to create polygon annotations. See **here** 928 for further information.

The **Cloud** tool is used to create cloud annotations. See **here** 935 for further information.

The **Stamp** tool is used to place stamps. See **here** 940 for further information.

The **Pencil** tool is used to create freehand lines. See **here** 955 for further information.

The **Eraser** tool is used to remove **Pencil** tool lines. See **here** 955 for further information.

5.3.1.2 **Form Toolbar**

Form Toolbar

The **Form Toolbar** enables options for adding and editing document form fields. Click **Edit Form** to enable the **Form Toolbar** options:
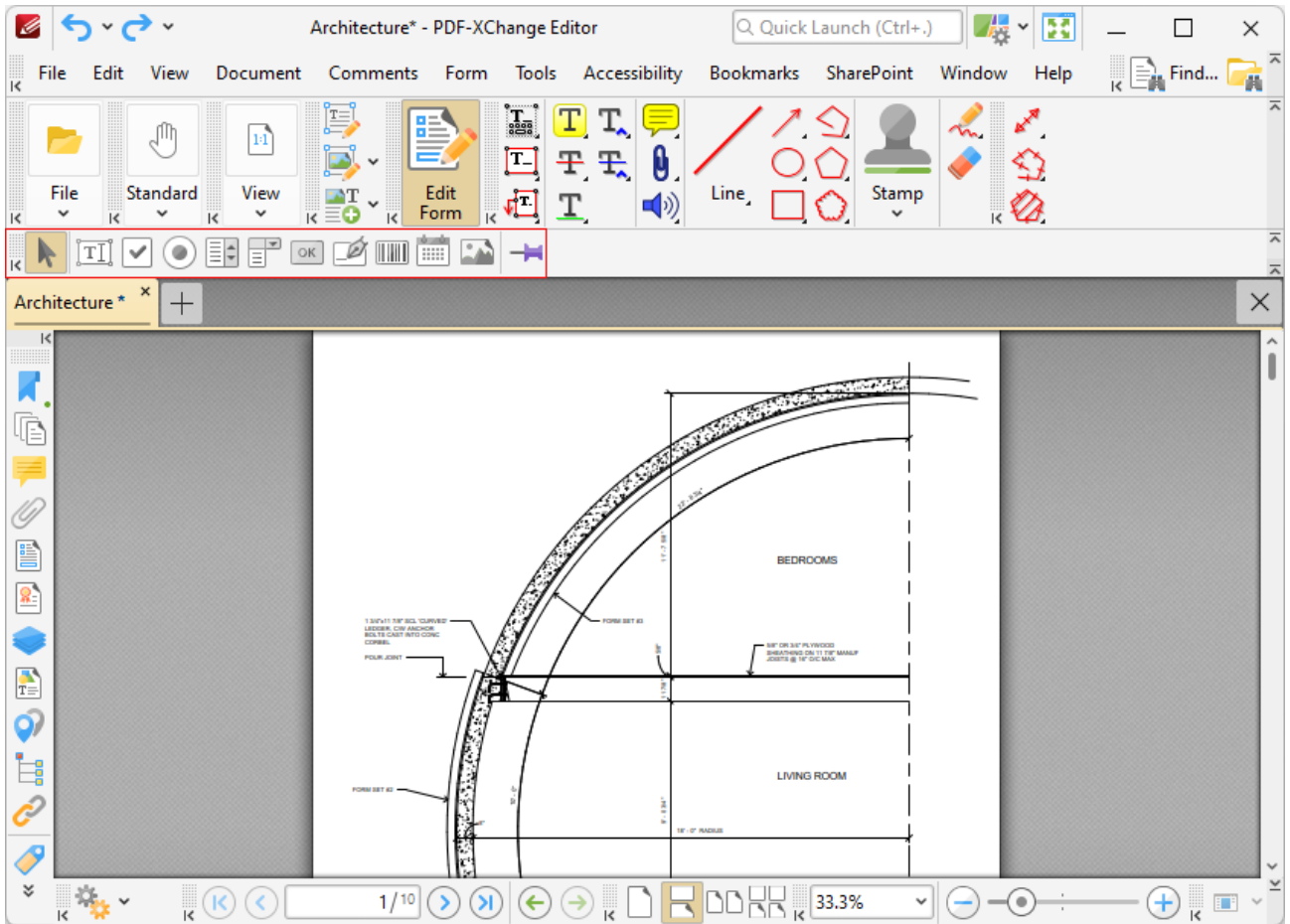
Figure 1. Edit Form Button, Form Toolbar

The **Select Fields** mode is used to select and move fields. Click a field to select it. Click and drag to move fields.

The **Keep Mode** setting is used to retain the selected form mode. If this mode is enabled then it is possible to create several forms consecutively. If it is disabled then the selected mode will revert to the **Select Fields** mode after a single use.

The **Text Field** mode is used to add text fields to documents. Text fields are used to denote a space in which users can can enter text, such as their address or credit card details. See **here** 326 for further information.

The **Check Box** mode is used to add check boxes to documents. Check boxes allow users to make a binary choice between mutually exclusive options, such as yes/no answers. See **here** 348 for further information.

The **Radio Button** mode is used to add radio buttons to documents. Radio buttons allow users to choose only one of a predefined set of options, such as when answering multiple choice questions. See **here** 359 for further information.

The **List Box** mode is used to add a list of choices to documents. List boxes allow users to select one or more items from a list of options contained within a static, multiple line text box, such as a list of months of the year. See **here** 370 for further information.

The **Dropdown** mode is used to add dropdown menus to documents. Dropdown menus allow users to select only one value from a list of options contained within a static, multiple line text box, such as a list of nationalities. See **here** 381 for further information.

The **Button** mode is used to add action buttons to documents. Buttons allow users to trigger an event/action, such as opening a web link or playing a sound. See **here** 407 for further information.

The **Digital Signature** mode is used to add digital signature fields to documents. Digital signature fields allow users to sign documents digitally, which increases security and integrity. See **here** 423 for further information.

The **Barcode** mode is used to add barcodes to documents. Barcodes translate form data into an encoded pattern that compatible devices can read and archive, which increases security and efficiency. See **here** 440 for further information.

The **Date** mode is used to add customized text fields that feature date functionality to documents. The settings are identical to the **Text Field** mode, detailed above, with the exception that created fields feature date functionality by default.

The **Image** mode is used to add customized button fields to documents. The settings are identical to the **Button** mode, detailed above, but the default layout is slightly different, and Javascript is added automatically to enable the insertion of images to be submitted as form data.

Right-Click Shortcut Menu for Form Fields

When form fields are right-clicked the following options are displayed:
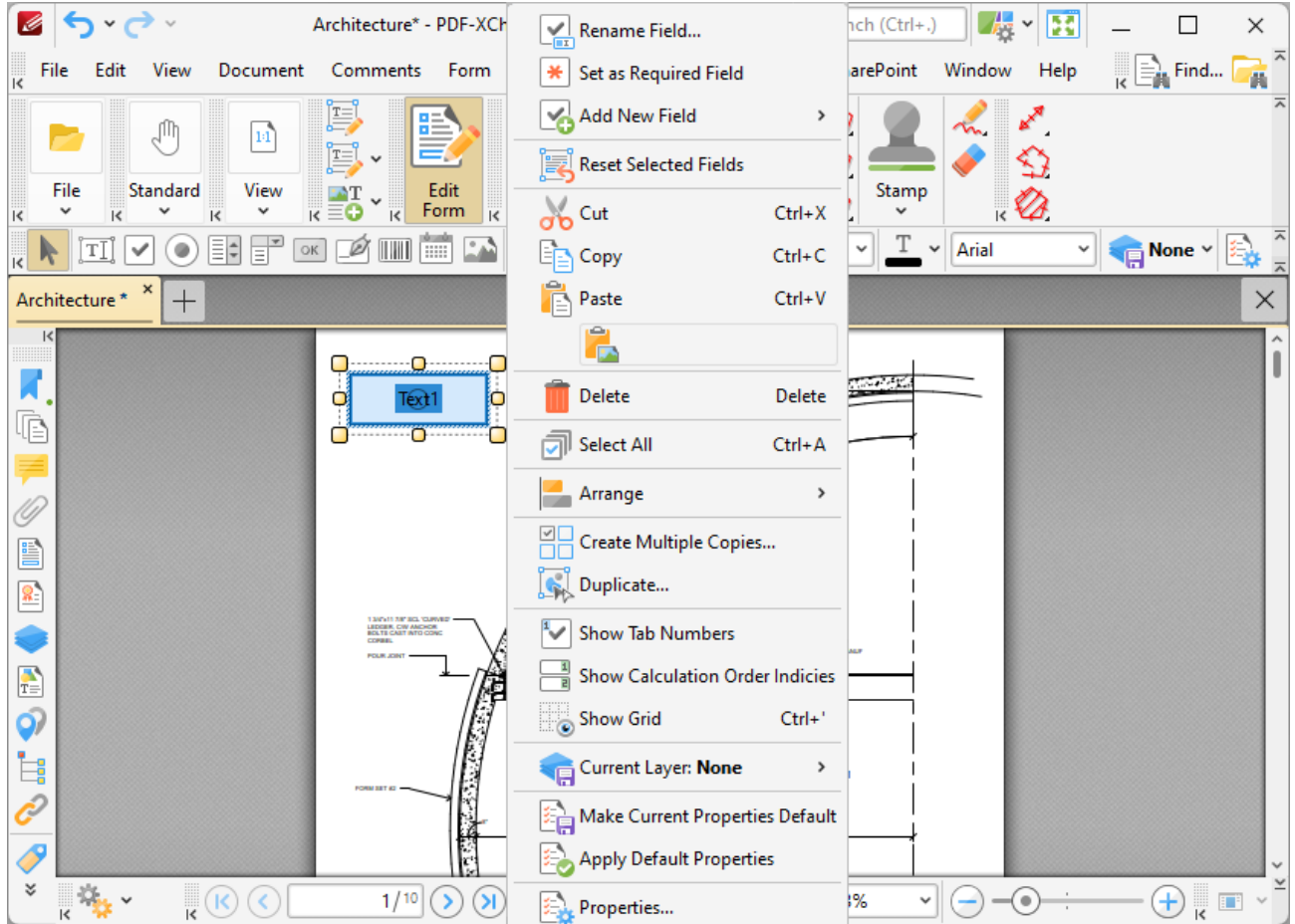
Figure 2. Right-Click Form Options

- Click **Rename Field** to rename selected fields.
- Click **Set as Required Field** to designate selected field as required, which means it must be filled before the document can be submitted. These fields will also be highlighted when the **Highlight Required Fields Only** option outlined **here** [260] is utilized.
- Click **Add New Field** to add new form fields to documents. Available forms are detailed above.
- Click **Cut, Copy** or **Delete** to cut/copy/delete selected forms.
- Click **Select All** to select all form fields.
- Click **Arrange** to arrange multiple fields. This option is available only when multiple fields are selected. If the form fields were group-selected with the mouse, then the first form placed in the document is used as the reference point to arrange the other forms. If the form fields were group-selected by holding Ctrl and selecting them one at a time, then the first form selected will be used as the reference point. The **Arrange** options for form fields are detailed below:
  - **Align Left Edges**
  - **Align Horizontal Centers**

- **Align Right Edges**
- **Align Top Edges**
- **Align Vertical Centers**
- **Align Bottom Edges**
- **Align to Selection** aligns selected forms to **Selection Bounds, Key Object** or **Page** as desired.
- **Distribute Horizontally**
- **Distribute Vertically**
- **Make Same Width**
- **Make Same Height**
- **Make Same Size**
- **Bring Forward,** which brings the selected form field up a step in cases where multiple forms overlap.
- **Send Backward,** which sends the selected form field back a step in cases where multiple forms overlap.
- **Bring to Front,** which brings the selected form field to the top in cases where multiple forms overlap.
- **Send to Back,** which sends the selected form field to the back in cases where multiple forms overlap.
- Click **Create Multiple Copies** to create copies of selected forms. See *(figure 3)* for further information.
- Click **Duplicate** to duplicate selected forms to a specific page range. Page offsets can be added for duplicates as desired. See *(figure 4)* for further information.
- Click **Show Tab Numbers** to display automated tab numbers in each form field. These numbers represent the tab order when the Tab key is used to navigate between forms.
- Click **Show Grid** to activate the grid feature, which displays in the background of documents and assists in the placement of objects.
- Click **Make Current Properties Default** to set the properties of the form field currently selected as the default properties for all subsequent forms of the same format.
- Click **Apply Default Properties** to apply the default properties to the selected form field.
- Click **Properties** to launch the **Properties pane,** 213 which can be used to view/edit the properties of selected fields.
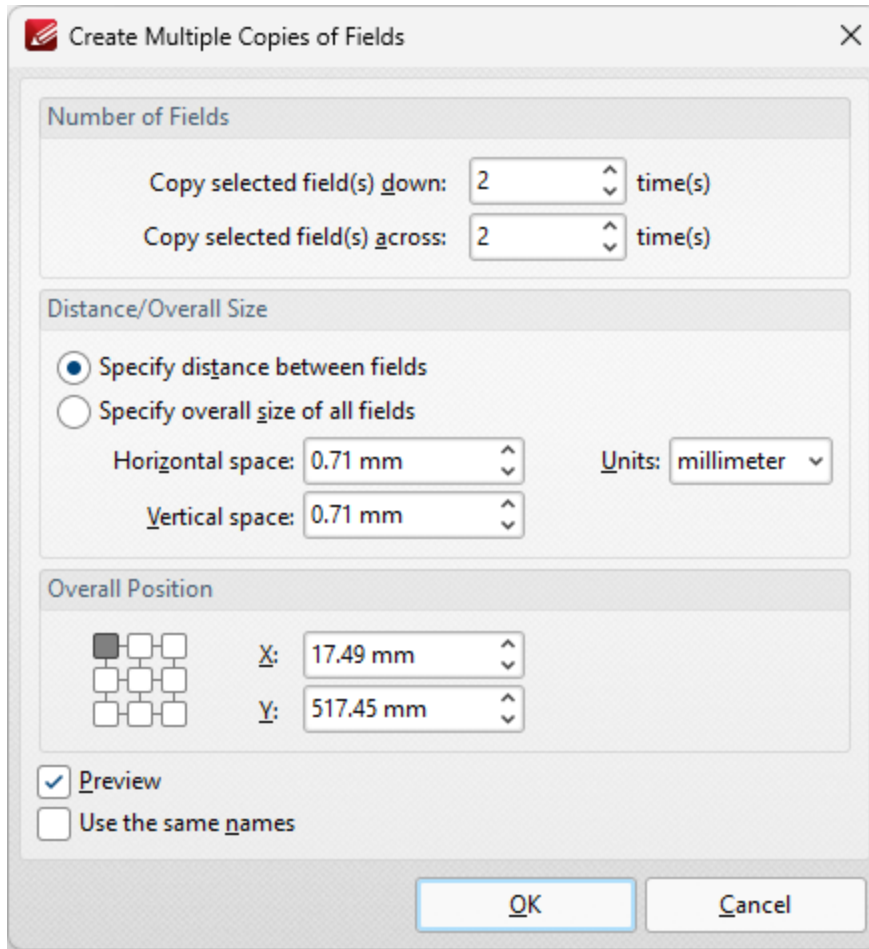
Figure 3. Create Multiple Copies of Fields Dialog Box

- The figure entered in the the **Copy selected fields down** number box determines the amount of copies placed vertically below source fields.
- The figure entered in the the **Copy selected fields across** number box determines the amount of copies placed horizontally from source fields.
- Select **Specify distance between fields** to determine the distance between copies. 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 fields are multiplied. The value entered in the **Overall width** and **Overall height** number boxes determines the overall width and height 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 multiple copies of form fields are created.
- Select the **Preview** box to place a preview before the creation of 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 source fields, followed by a unique number.
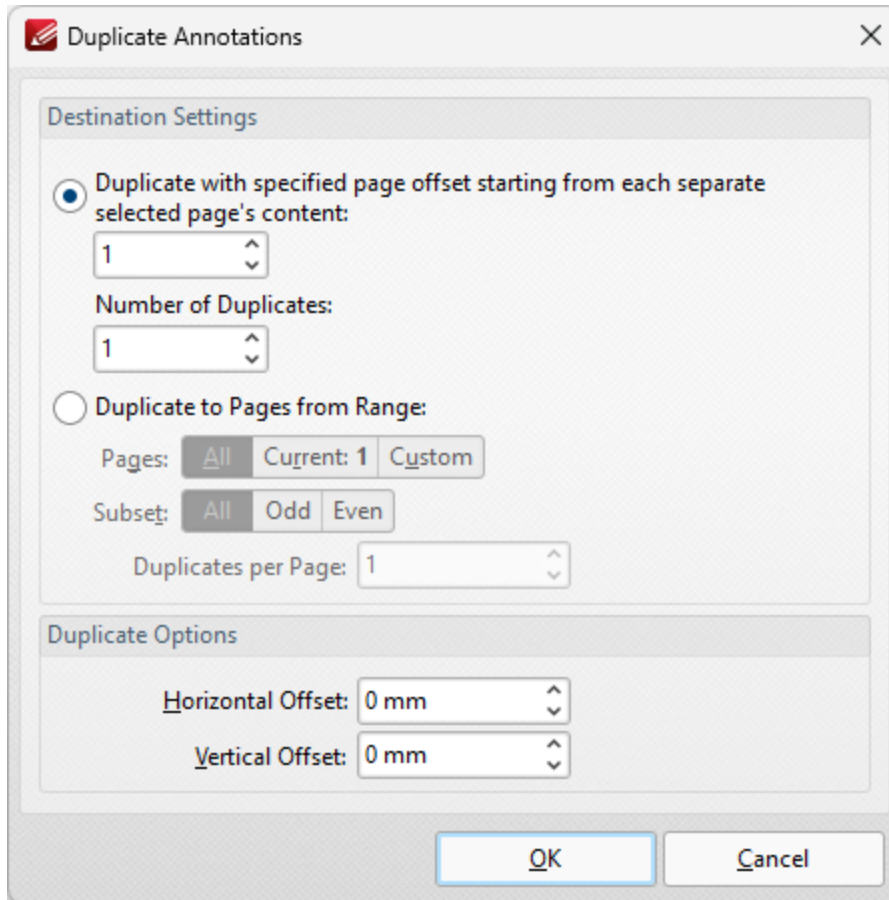
Figure 4. Duplicate Annotations Dialog Box

- Use the **Destination Settings** to determine the output settings for duplicated forms:
    - Select the upper option button to duplicate forms through a specified page offset from the source form. Enter the desired page offset in the upper number box and the number of duplicates in the lower number box. For example, if the page offset is specified as '3' and the number of duplicates is specified as '3', then three duplicates will be created, with one placed on every third page starting from the source form.
    - Select the lower option button to duplicate forms to a specified page range:
        - Click **All** to select all document pages.
        - Click **Current Page** to duplicate the form on only the current page.
        - Click **Pages** to determine a page range. See **here** 1274 for page range options.
        - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only** for page ranges.
        - Use the **Duplicates per Page** number box to specify the number of duplicate forms created per page.

- Use the **Duplicate Options** settings to determine the duplication of selected forms:
    - The value entered in the **Horizontal Offset** number box determines the horizontal offset from the duplicated field.

- The value entered in the **Vertical Offset** number box determines the vertical offset from the duplicated field.

Tab Order of Forms

Please note that the Tab key can be used to scroll through text field forms after they have been added to documents. Follow the instructions below to change the tab order of forms:

1. Click **View** in the **MenuToolbar.** 473

2. Hover over **Other Panes.**

3. Click **Fields.** The **Fields** pane will open.

4. Click **Options.** The **Options** submenu will open.

5. Click **Order by Pages.** Then click the **Edit Form** tool in the **Shortcut Toolbar.**

6. Click and drag fields within the **Fields** pane to reorder them.

5.3.1.2.1 Add Text Fields to Documents

Add Text Fields to Documents

Text fields enable users to enter form information such as their name, password and date of birth:
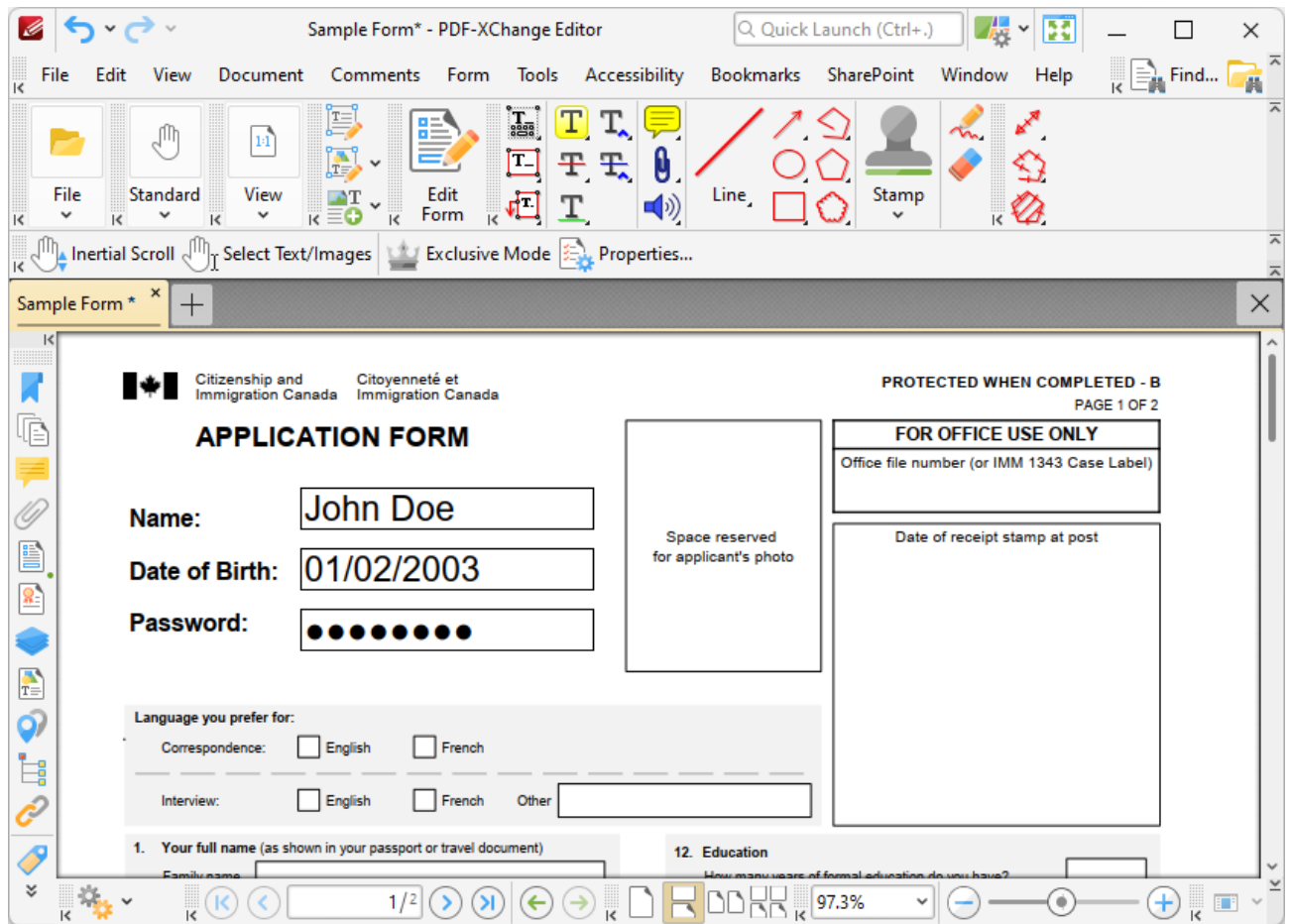
Figure 1. Example Text Fields

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for text fields. Click the dropdowns below for further information:

▼ **Add Text Fields to Documents**

1. Click **Edit Form,** then click the **Text Field** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the text field:
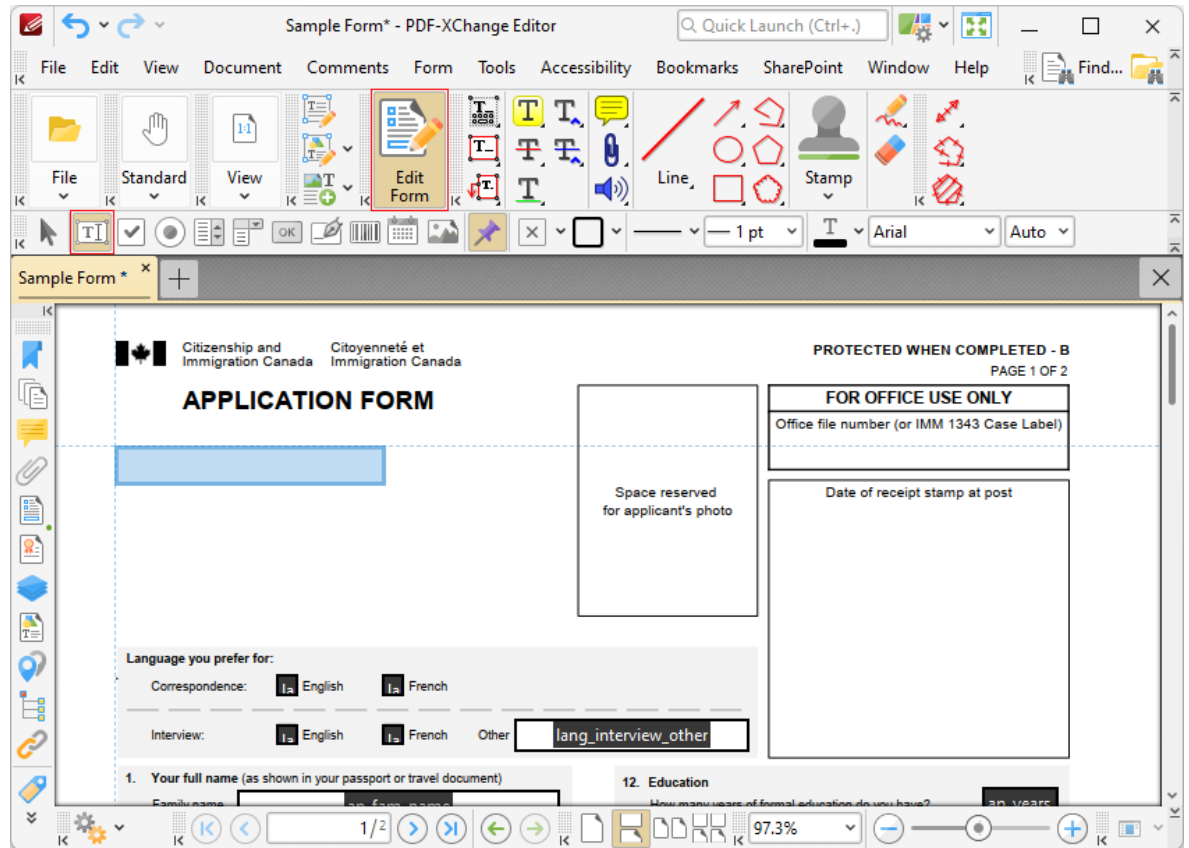
Figure 2. Active Text Field Tool

2. Move the rectangle to the desired location and then click to add the text field to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of text fields). Added text fields appear as detailed below:
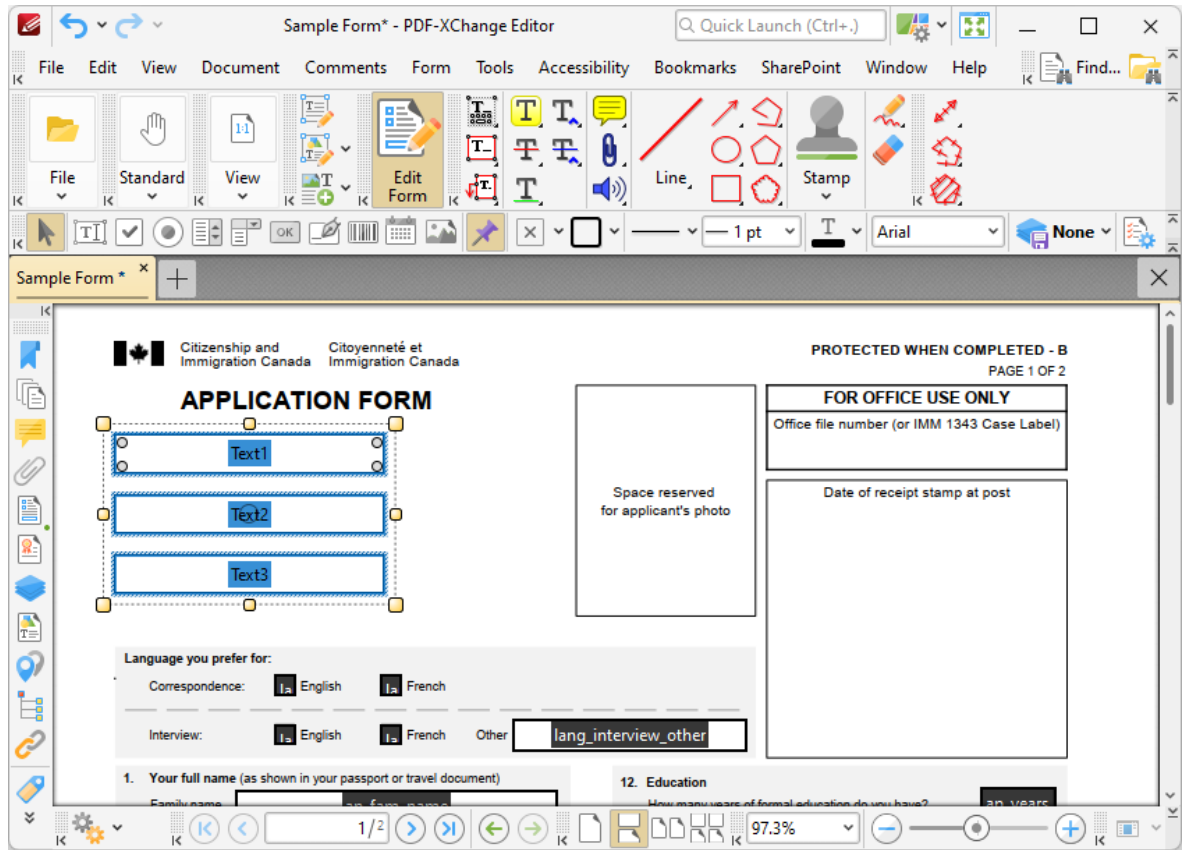
Figure 3. Added Text Fields

- Click and drag the yellow control points to resize text fields.
- Use the options in the **Properties Toolbar** [485] to determine the style and appearance of text fields:
    - **Fill Color** determines the color used to fill text fields.
    - **Stroke Color** determines the border color of text fields.
    - **Border Style** determines the style of text field borders.
    - **Border Width** determines the width of text field borders.
    - **Text Color** determines the color of text entered in text fields.
    - **Font** determines the font of text entered in text fields.
    - **Properties** launches the **Text Field Properties** pane, which enables the customization of additional elements of text fields.

▼ **The Text Field Properties Pane**
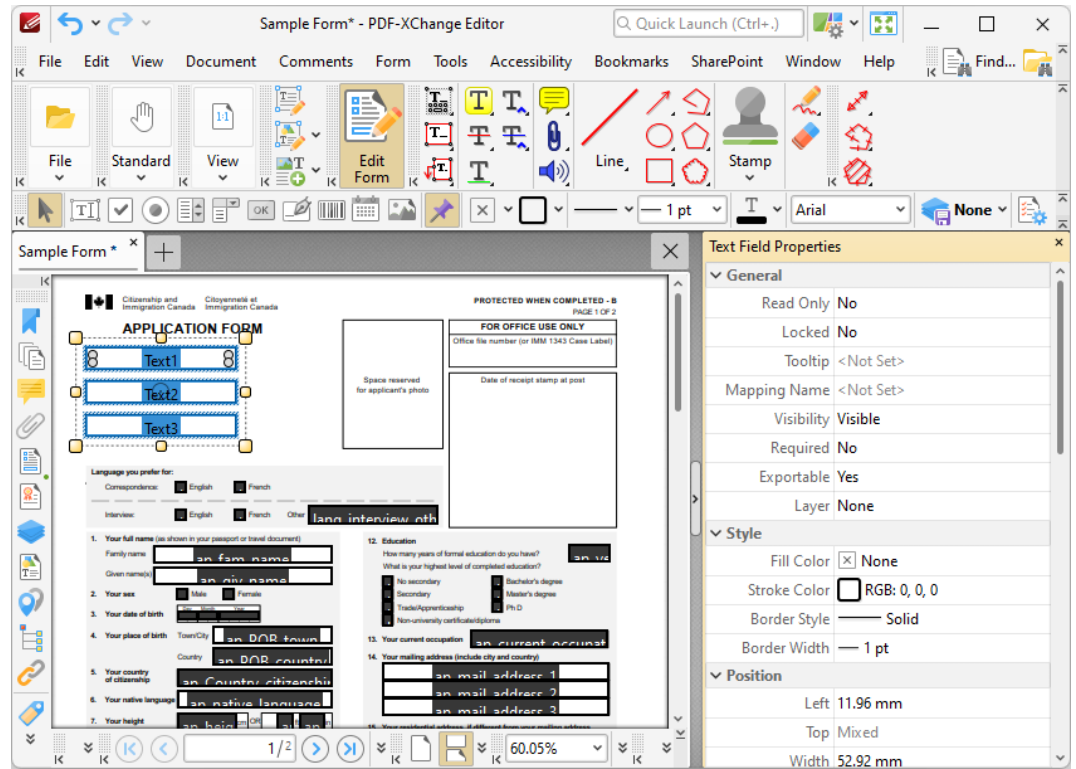
Figure 4. Text Field Tool, Text Field Properties Pane

The **Text Field Properties** pane can be used to determine a range of style and functionality options for text fields. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to text fields, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available in the **Text Field Properties** pane:

The **General** properties determine the general parameters of text fields:
- **Read Only** determines whether or not the text field can be edited.
- **Locked** determines whether or not the text fields can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the text field. This name is present when the **Edit Form** tool is selected, and when text fields are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the text field.
- **Mapping Name** determines the mapping name that the text field uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of text entered in the text field.
- **Visibility** determines the visibility of the text field.
- **Required** determines whether or not the text field is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the text field data can be exported from the form.
- **Layer** determines the optional content layer to which the text field belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of text fields. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of text fields:
- **Left** determines the distance of the text field from the left margin.
- **Top** determines the distance of the text field from the bottom of the page.
- **Width/Height** determine the width/height of the text field.

The **Default Text Format** properties determine the default properties when text is entered into the text field:
- **Font** determines the font used.
- **Font Size** determines the size of the font.
- **Text Color** determines the color of the font.

The **Options** properties determine additional options for text fields:
- **Alignment** determines the text alignment within the text field.
- **Default Value** determines the default value of the text field. Text fields will show this value by default. If they are edited and then reset then the value entered for this property will be displayed.
- **File Select** determines whether or not files on the local computer are selected when their filename is entered in the text field. If set to **Yes** then the file contents are submitted as the value of the text field when the form is submitted.
- **Password** determines whether or not the text field is a password field. If text fields are designated as passwords then text entered into them will be encrypted in the standard manner:
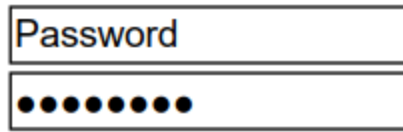
Figure 5. Standard Text Field (above) and Standard Text Field with Password Enabled (below)

- **Check Spelling** determines whether or not the spelling of words entered in the text field is automatically checked.
- **Multi Line** determines whether or not multiple lines of text are permitted in the text field.
- **Scroll** determines whether or not a scroll bar is added when multiple lines of text are entered into text fields.
- **Allow Rich Text** determines whether or not the text field permits rich text such as bold and italics.
- **Comb** determines whether or not line separators are inserted between characters in the text field:
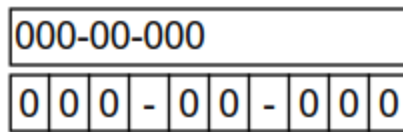
Figure 6. Standard Text Field (above) and Standard Text Field with Comb Enabled (below)

- **Character Limit** determines the maximum number of characters permitted in the text field.

The **Actions** properties determine the action taken when users interact with the text field:
- **Mouse Down** initiates an action when the left mouse button is pressed (without being released) on the text field.
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released) on the text field.
- **Mouse Enter** initiates an action when the pointer moves into the text field.
- **Mouse Leave** initiates an action when the pointer moves out of the text field.
- **On Focus** initiates an action when the text field is selected.
- **On Blur** initiates an action when the text field is deselected.
- Click the ellipsis icon on the right of actions to add/edit text field actions:
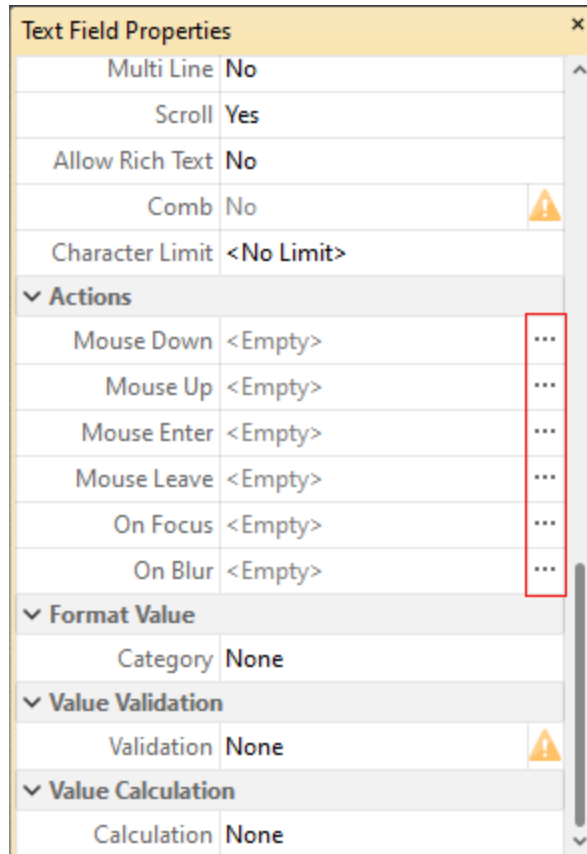
Figure 7. Text Field Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

The **Format Value** properties determine the type of information permitted to be entered in the text field and the format in which it should be entered:

- **Category** determines the category of the text field. Each category has different options, as detailed below:
  - **None** is the default setting. Text fields do not have a **Format Value** category when this option is selected.
  - **Number** sets the text field input to numerical values. The following options are available for this setting:
    - **Decimal Places** determines the number of decimal places displayed.
    - **Separator Style** determines the separators used for numbers.
    - **Currency Symbol** determines the currency symbol used in the text field.
    - **Symbol Location** determines 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** determines how numbers with negative values are displayed.
- **Percentage** sets the text field input to percentage values. The following options are available for this setting:
  - **Decimal Places** determines the number of decimal places permitted.
  - **Separator Style** determines the separator used for numbers.
- **Date** sets the text field input to date values and adds a dropdown calendar to the text field. Use the **Date Format** parameter to determine the format of dates.
- **Time** sets the text field input to time values (hours and minutes). Use the **Time Format** parameters to determine the format of time values.
- **Special** sets the text field input values to one of the special options. Use the **Special Format** parameter to determine the format. The options are:
  - **ZIP Code**
  - **ZIP Code +4,** which is used for nine-digit postal codes.
  - **Phone Number**
  - **Social Security Number**
- **Custom Action** adds custom JavaScript actions to text fields. There are two options:
  - **Format Action** is used to enable custom JavaScript for formats. Click the ellipsis icon to add/view JavaScript.
  - **Keystroke Action** is used to enable custom JavaScript for keystrokes. Click the ellipsis icon to add/view JavaScript.
  - If the options above are used then the **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**
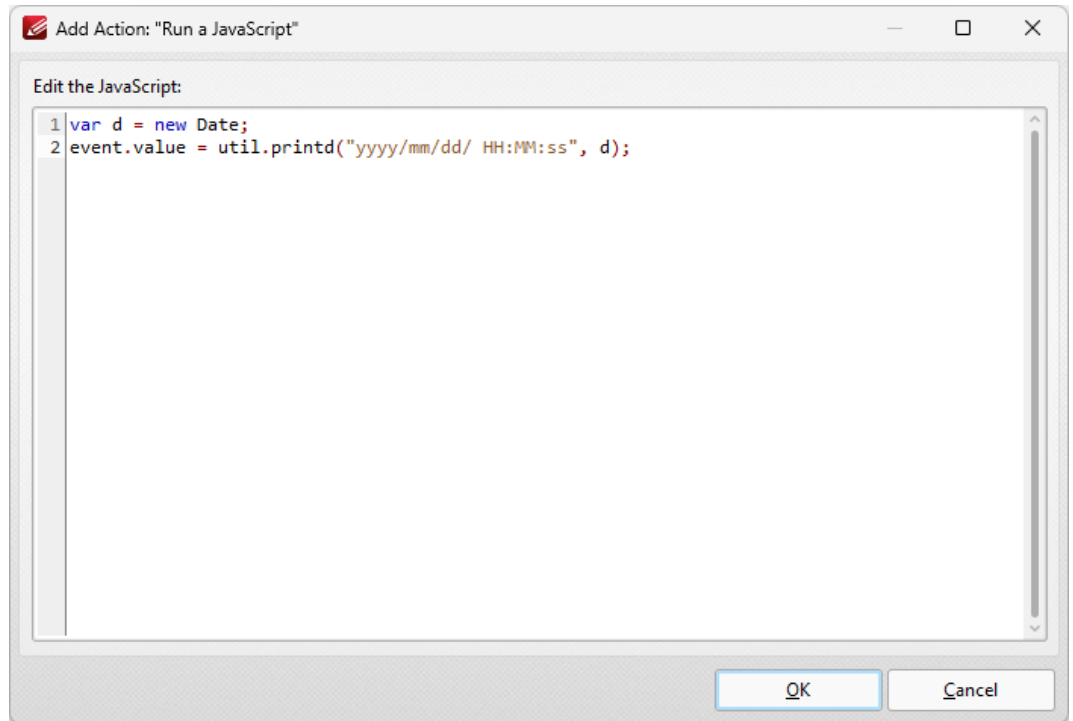
Figure 8. Edit Action: "Run a JavaScript" Dialog Box

The **Value Validation** properties determine the validation of values entered into the text field. These properties can be used to ensure that the information entered into forms fits within specific parameters:

- **Validation** determines how values are validated:
    - **Value in Range** sets the range within which values entered into the text field must fall:
        - **From** specifies the minimum value.
        - **To** specifies the maximum value.
    - **Custom Action** enables the use of custom JavaScript in order to validate values entered in the text field:
        - **Validation Action** specifies the JavaScript to use, as detailed in *(figure 8)*.

The **Value Calculation** properties determine the value of text fields from other text fields, and are ideal in forms where entered form data creates the value of further forms, such as when several orders are placed that combine to give a total cost. The available properties are detailed below:

- **None** specifies that calculations are not performed.
- **Sum** uses the sum of specified fields.
- **Product** uses the product of specified fields.
- **Average** uses the average of specified fields.
- **Minimum** uses the minimum value of all the specified fields.
- **Maximum** uses the maximum value of all specified fields.

- Please note that when the **Sum, Product, Average, Minimum** and **Maximum** properties are used, the additional entry **"Fields"** will appear beneath the **Calculation** property. Use this entry to specify the fields used in these calculations.
- **Simplified Notation** enables the insertion of a custom calculation to be performed on fields. Use the **Simple Notation** box to determine the calculation. Use the document field names and standard mathematical notation (+, -, *, /) to specify the calculation. If there are spaces in form field names then they must be entered in quotation marks. For example: **Field1 + Field 2 / "Division Field" * 64.**
- **Custom Action** enables the use of custom JavaScript in order to perform calculations and determine the order in which calculations are performed. Click the ellipsis icon to add custom JavaScript, as detailed in **(figure 8).**

Value Validation Example

The following example details a simple value validation of values entered into the text field **'Text1':**
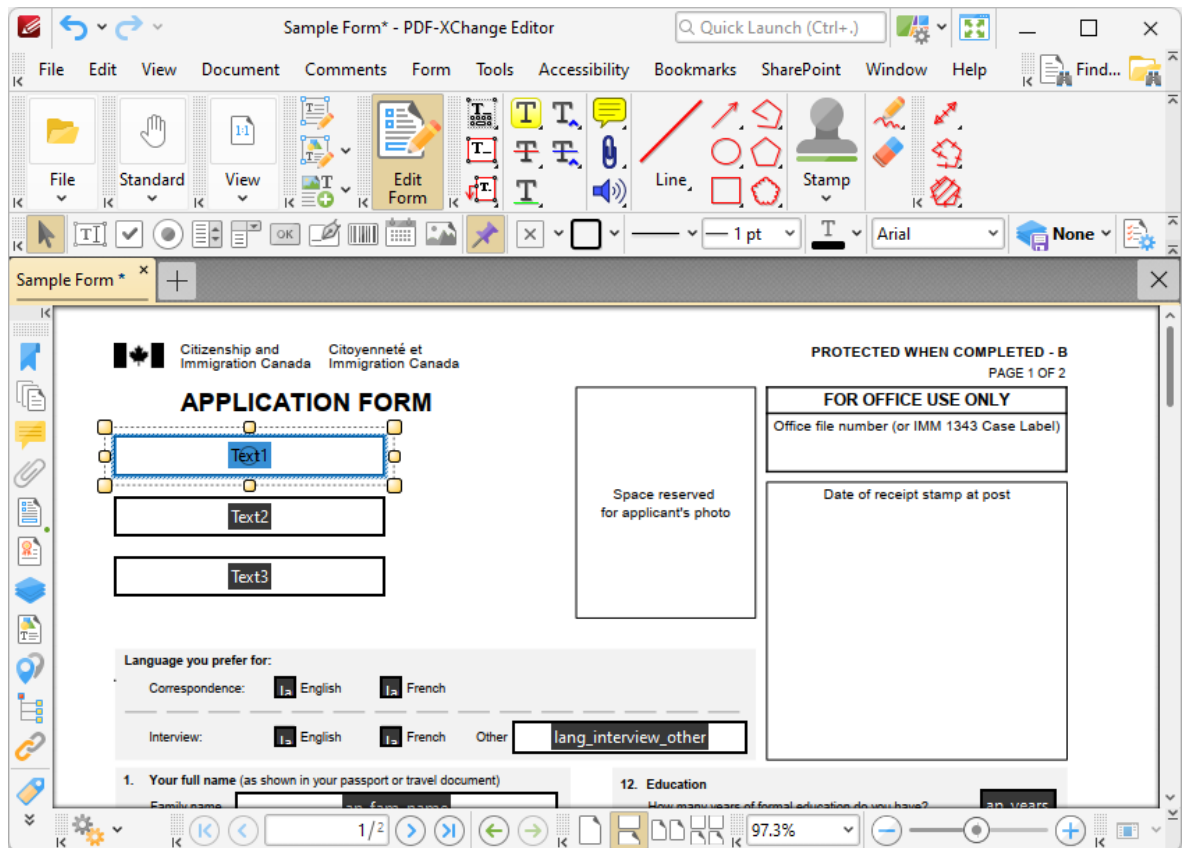
Figure 9. Value Validation Example, Text Field

This example will detail how to validate that values entered into **'Text1'** fall in the range 0-100:

1. Click **Edit Form,** then select **'Text1'** and click **Properties** in the **Properties Toolbar.** The **Text Field Properties** pane will open:
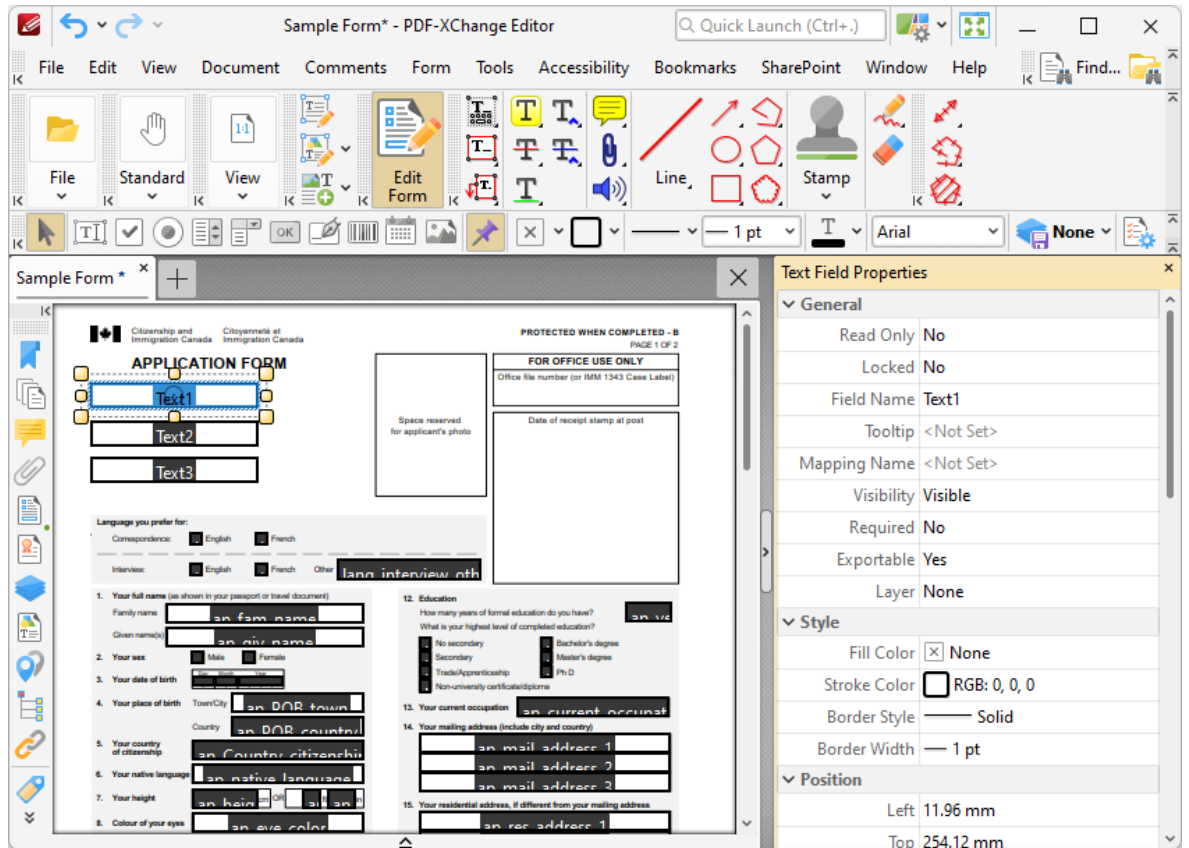
Figure 10. Value Validation Example, Text Field Properties Pane

2. Scroll down the **Text Field Properties** pane to the **Format Value** tab, then click the **Category** property and select **Number:**
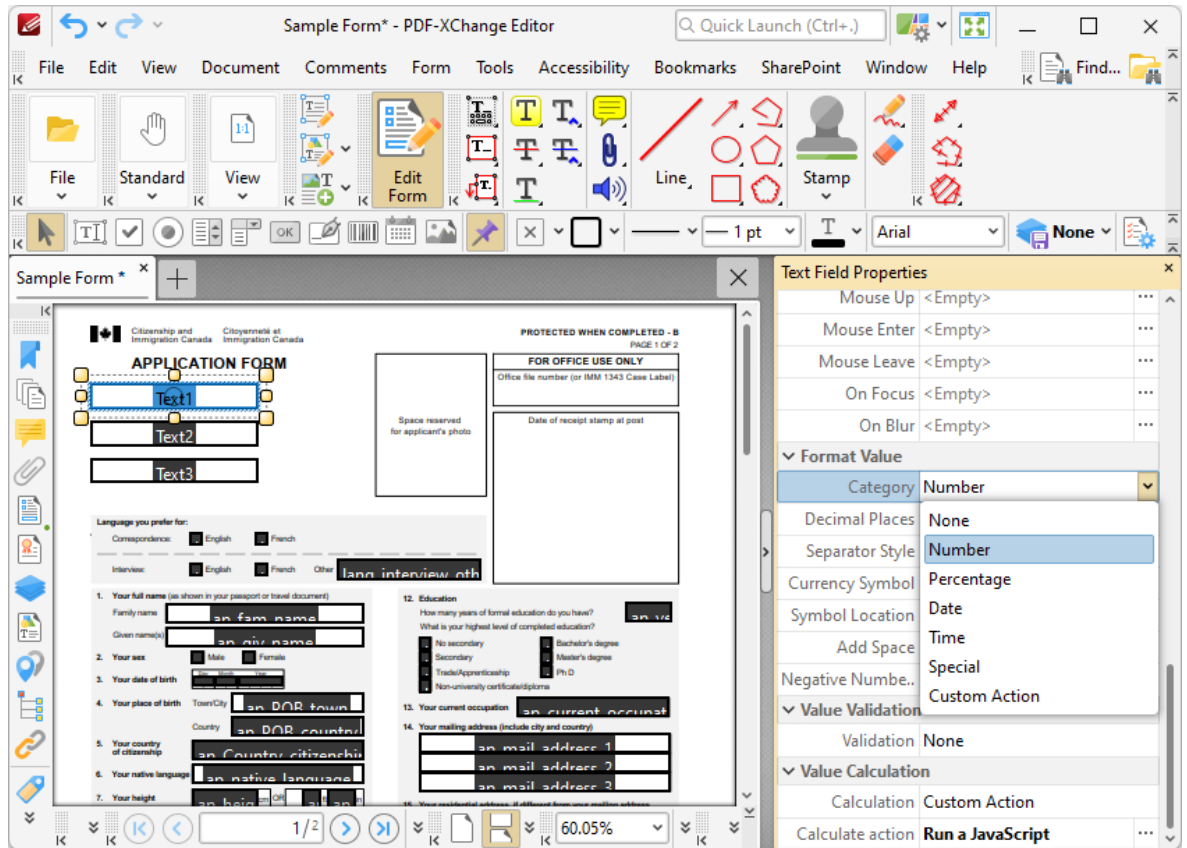
Figure 11. Value Validation Example, Category Option

3. Scroll down the **Text Field Properties** pane to the **Value Validation** tab, then click the **Validation** option and select **Value in Range:**
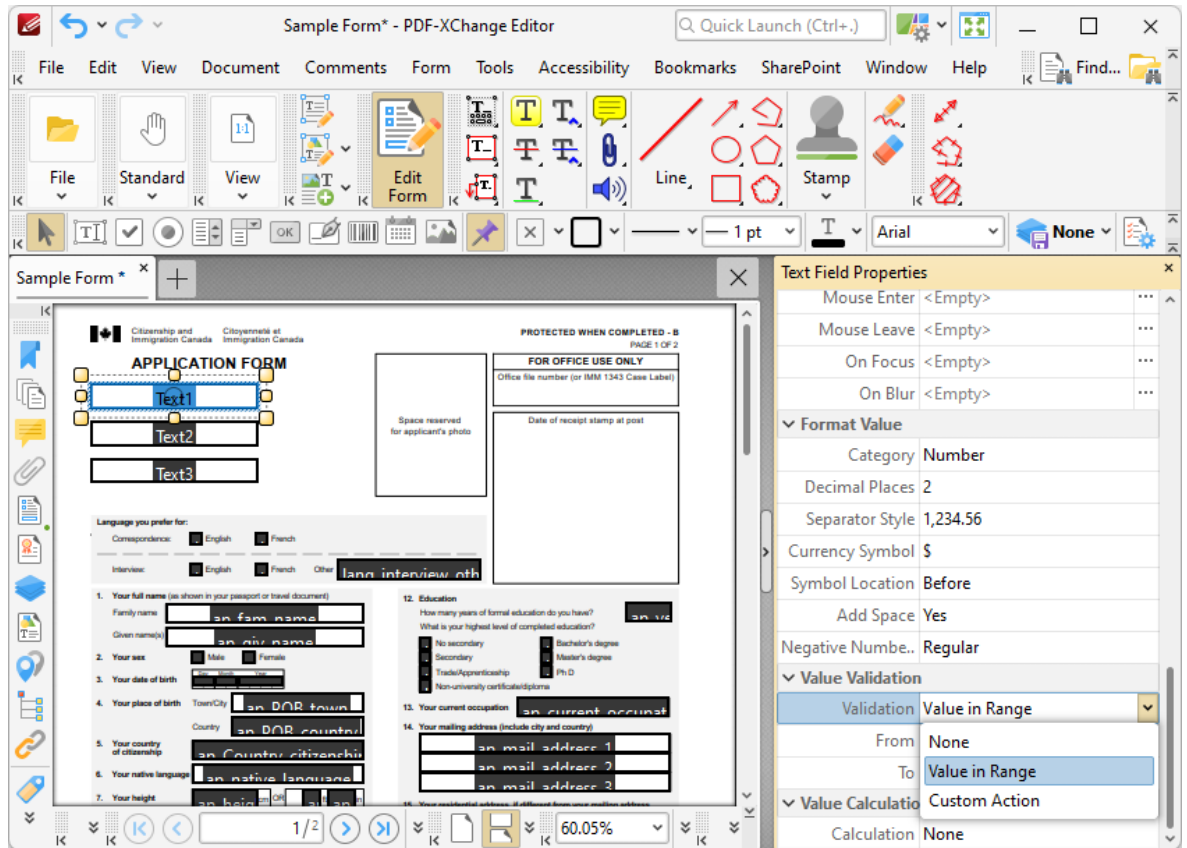
Figure 12. Value Validation Example, Validation Option

Note that the **From** and **To** options will appear beneath the **Validation** property.

4. Enter '0' in the **From** option and '100' in the **To** option:
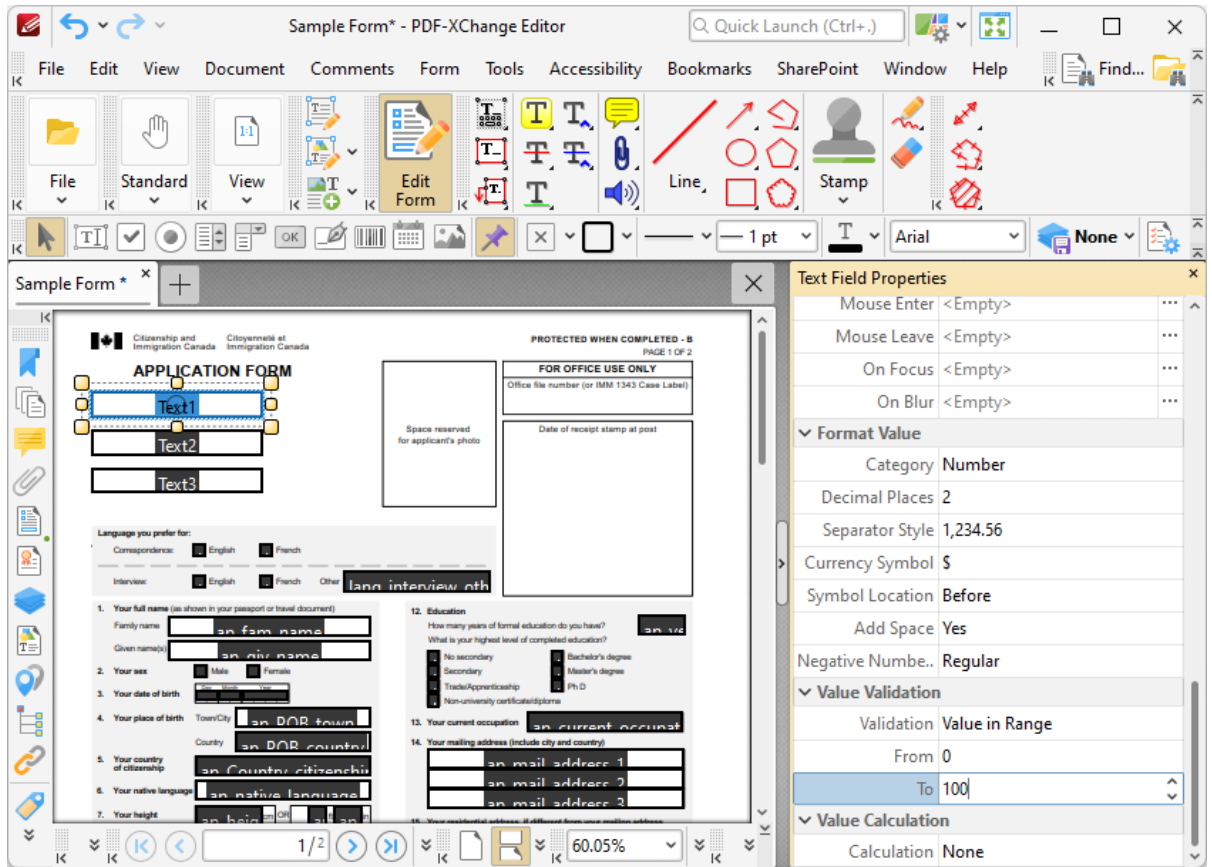
Figure 13. Value Validation Example, From/To Option

All values subsequently entered into '**Text1**' must fall into the range 0-100. Values outside of the specified range will not be permitted, and if they are entered in the text box then an error message will appear.

▾ **Value Calculation Example**

The following example details a simple value calculation using the text fields: '**Text1**', '**Text2**' and '**Text3**':
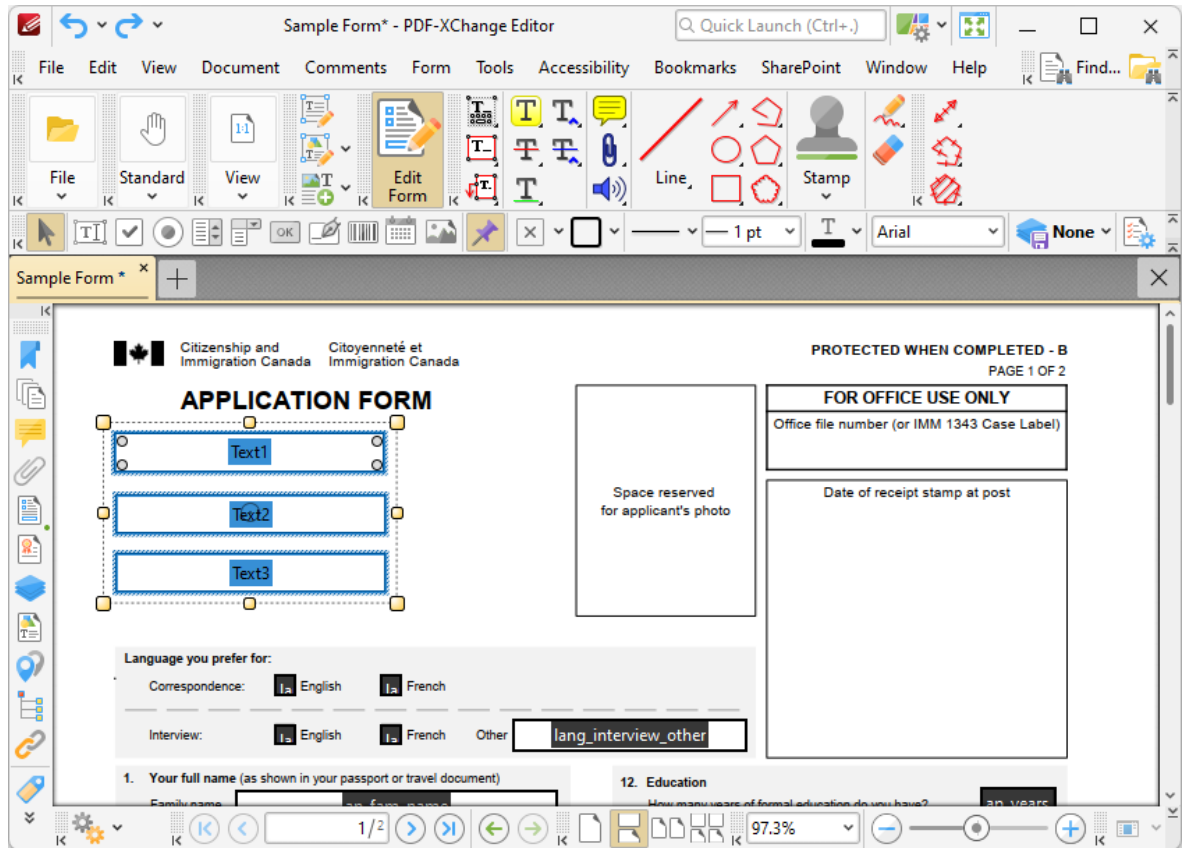
Figure 14. Value Calculation Example, Text Fields

This example will detail how to use the product of the values entered in **'Text1'** and **'Text2'** to create the value for **'Text3'**:

1. Click **Edit Form,** then select **'Text3'** and click **Properties** in the **Properties Toolbar.** The **Text Field Properties** pane will open:
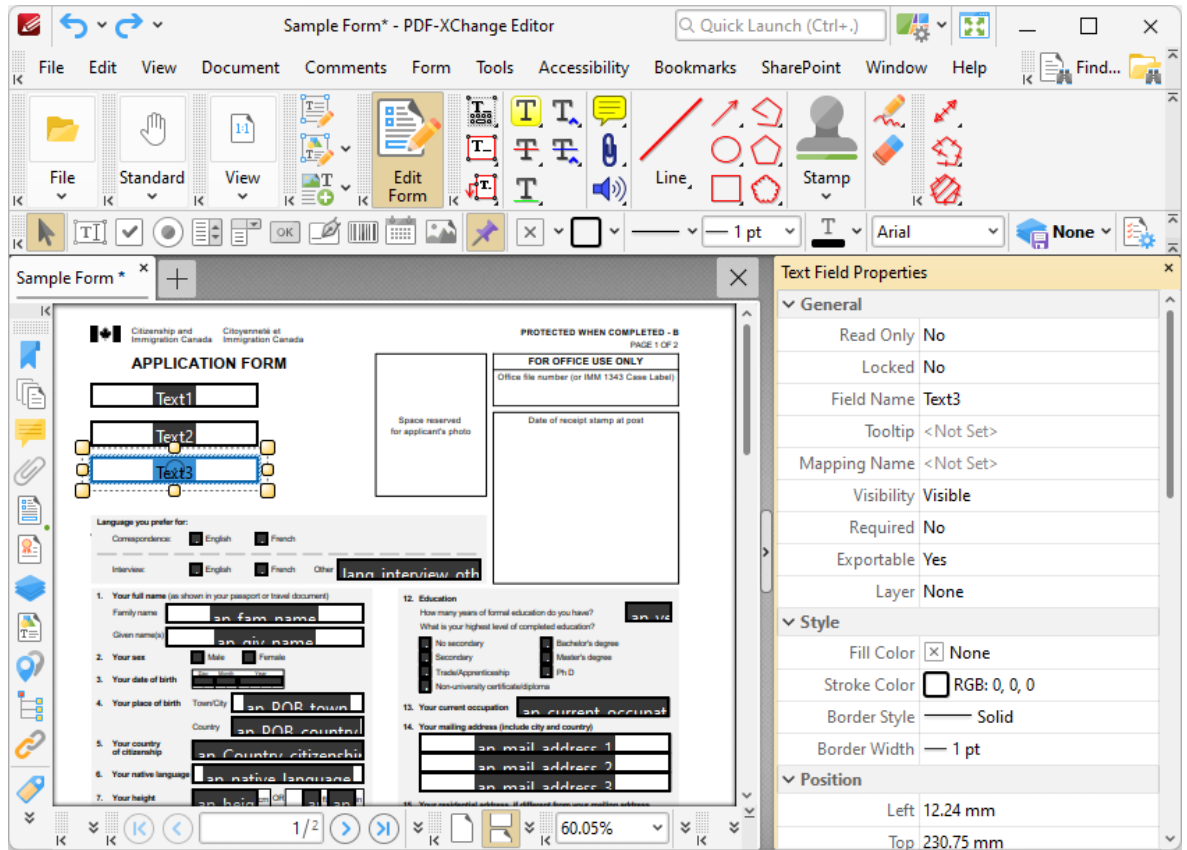
Figure 15. Value Calculation Example, Text Field Properties Pane

2. Scroll down the **Text Field Properties** pane to the **Value Calculation** tab, then click the **Calculation** property and select **Product:**
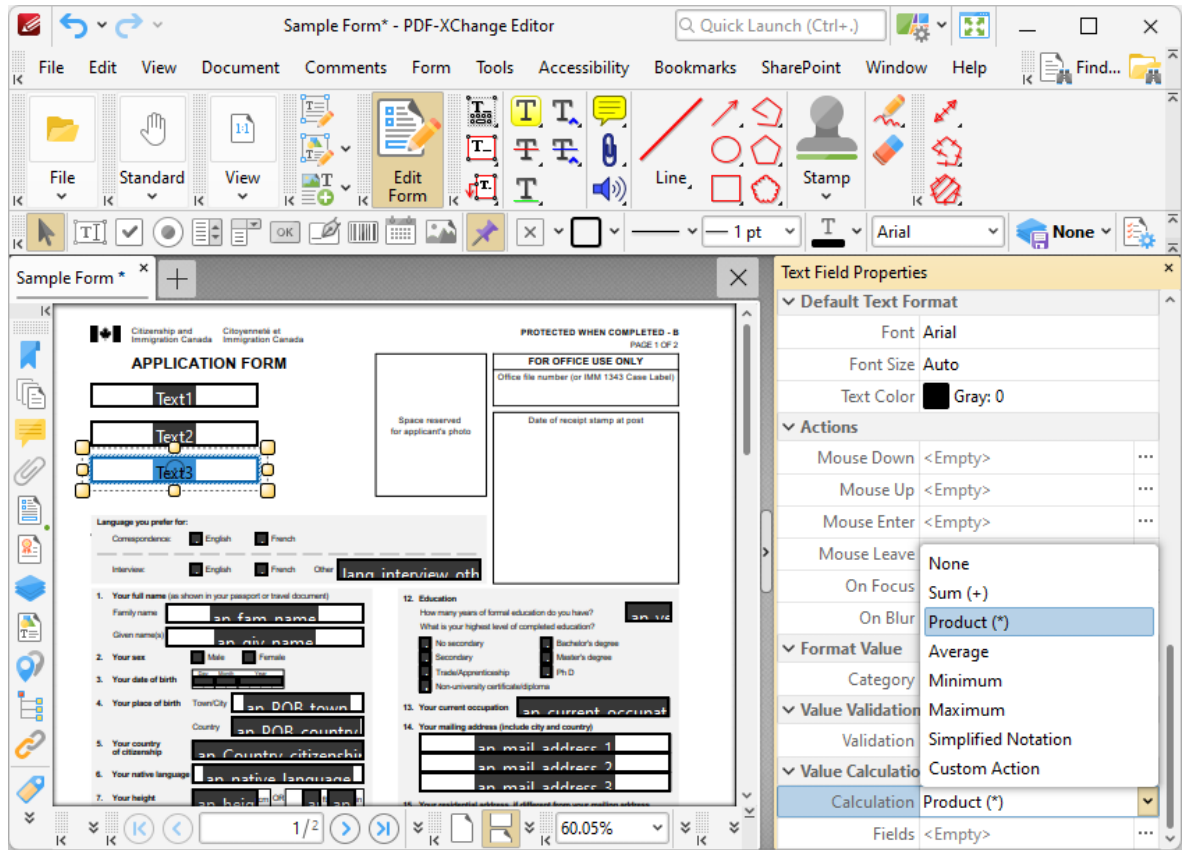
Figure 16. Value Calculation Example, Calculation Option

Note that the **Fields** property will appear beneath the **Calculation** property, as detailed in the image below. This option is used to specify the source of the values to use in the product calculation that will create the value for **'Text3'.**

3. Click the ellipsis icon on the right of the **Fields** property. The **Fields Selection** dialog box will open. Select **'Text1'** and **'Text2',** then click **OK:**
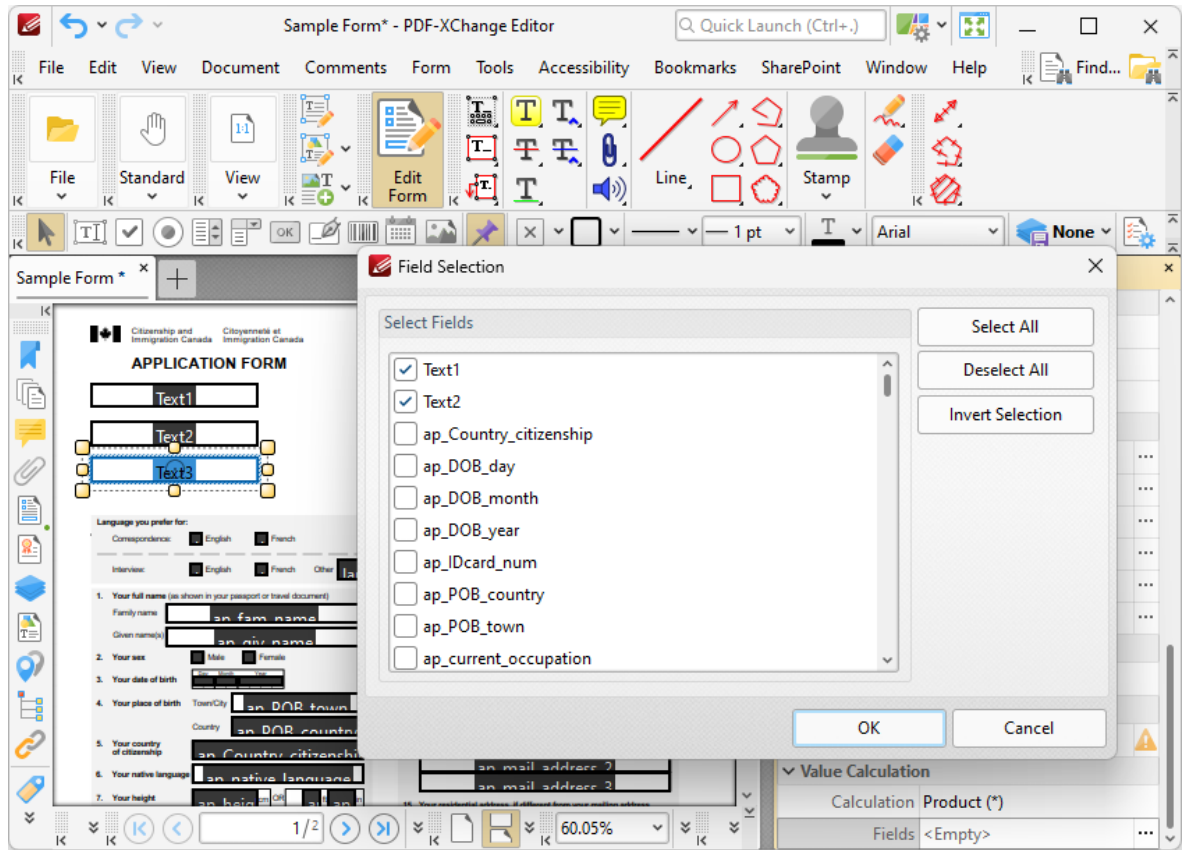
Figure 17. Value Calculation Example, Field Selection Dialog Box

The value of **'Text3'** will then be the product of the values entered in **'Text1'** and **'Text2':**
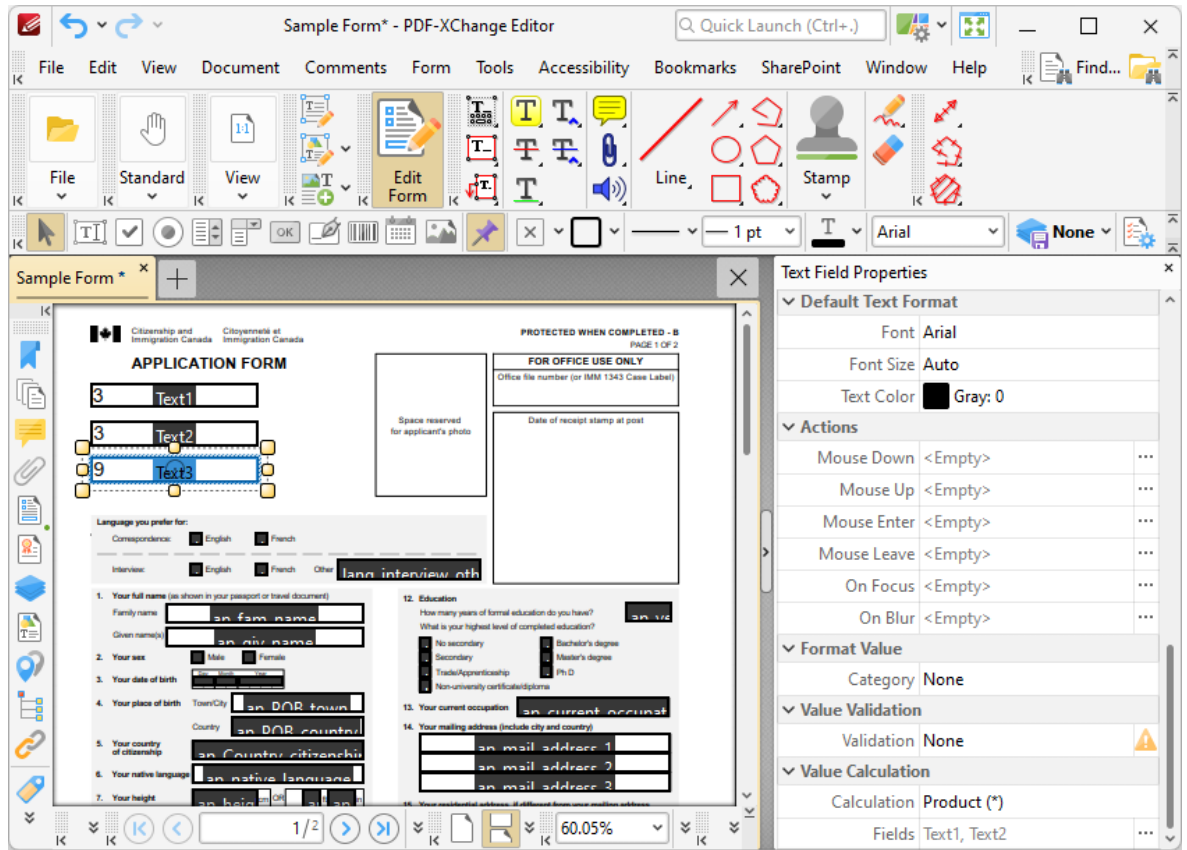
Figure 18. Value Calculation Example, Process Complete

If the values in **'Text1'** and **'Text2'** are subsequently changed, then the value in **'Text3'** will update.

Please note that the **Calculation Order** setting in the <u>**Fields Pane**</u>[527] can be used to determine the order in which fields are calculated. This is a useful feature when documents contain more than one form field that has value calculation settings. Follow the steps below to determine the order of calculation:

1. Click **Edit Form,** then click **View** in the **Menu Toolbar,** hover over **Other Panes** and click **Fields:**
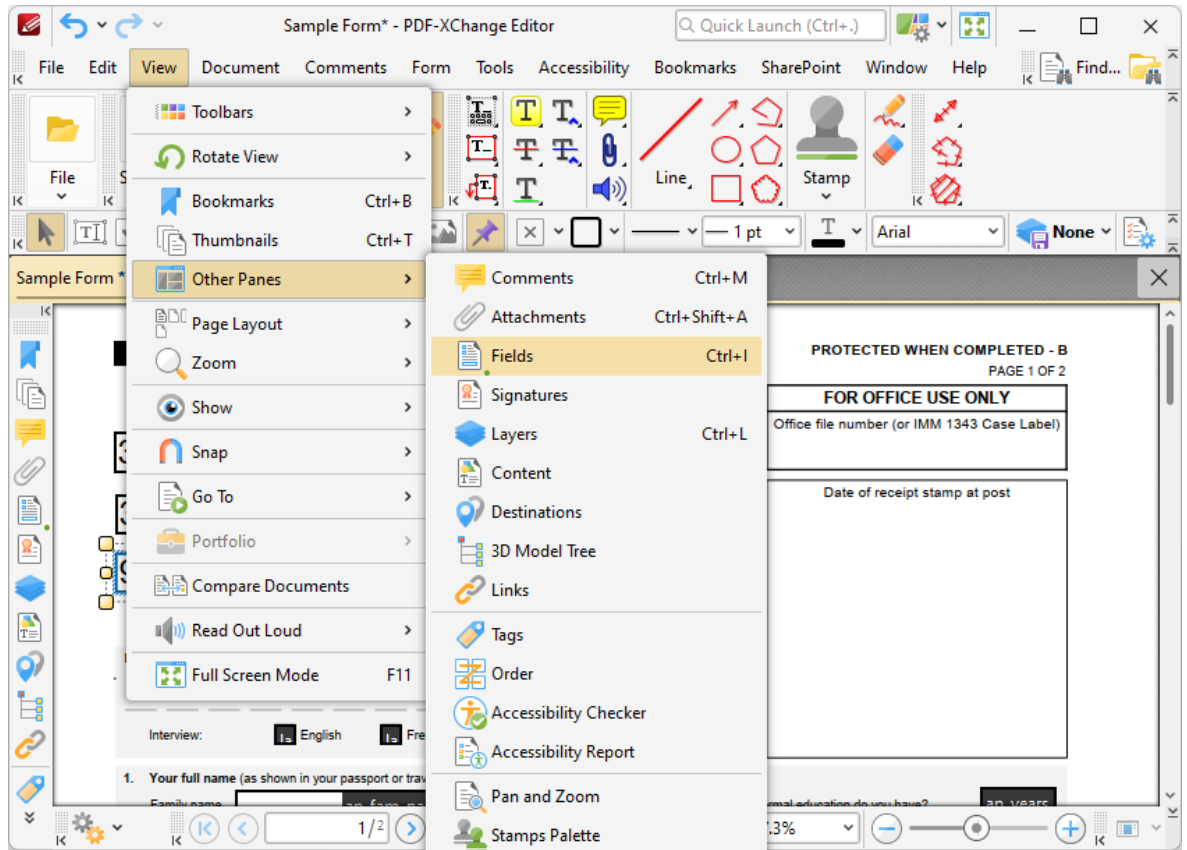
Figure 19. View Submenu, Other Panes, Fields

The **Fields** pane will open.

2. Click **Options** and then click **Calculation Order** in the submenu:
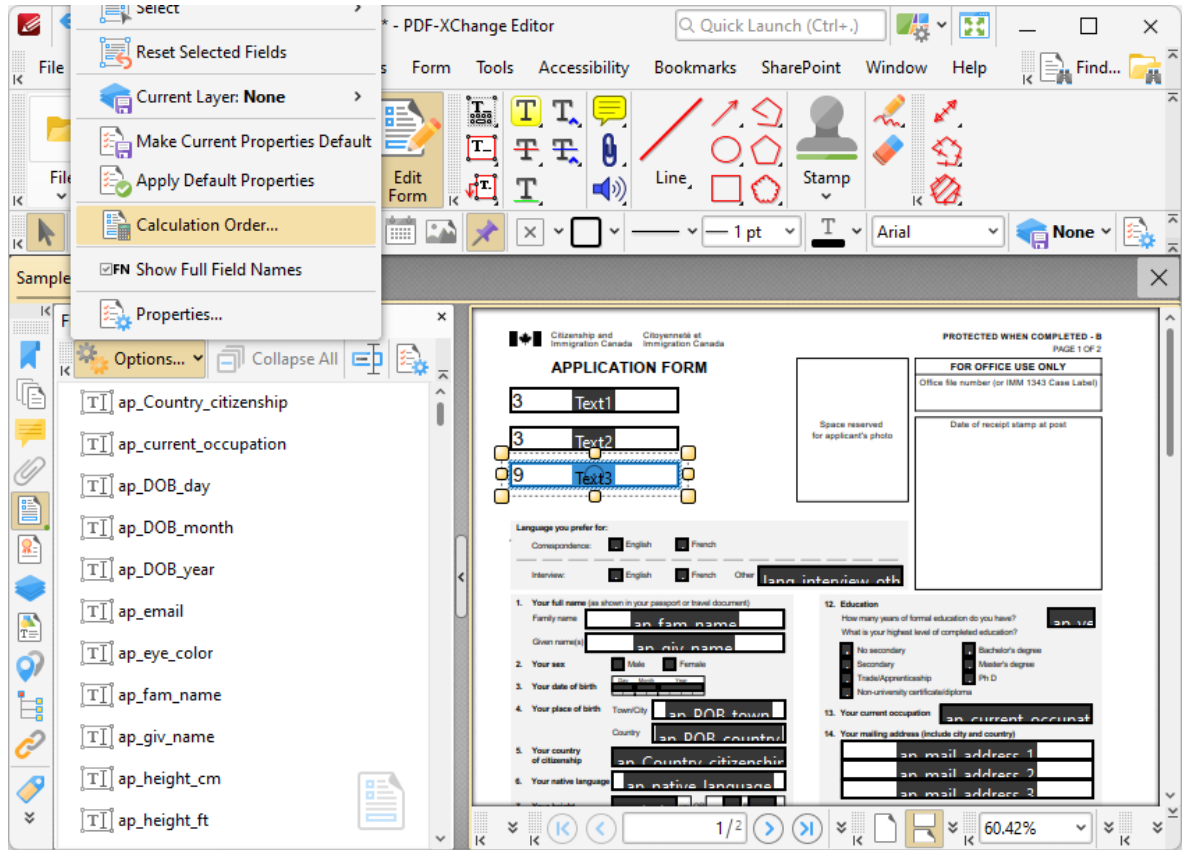
Figure 20. Fields Pane, Set Field Calculation Order

The **Calculation Order** dialog box will open:
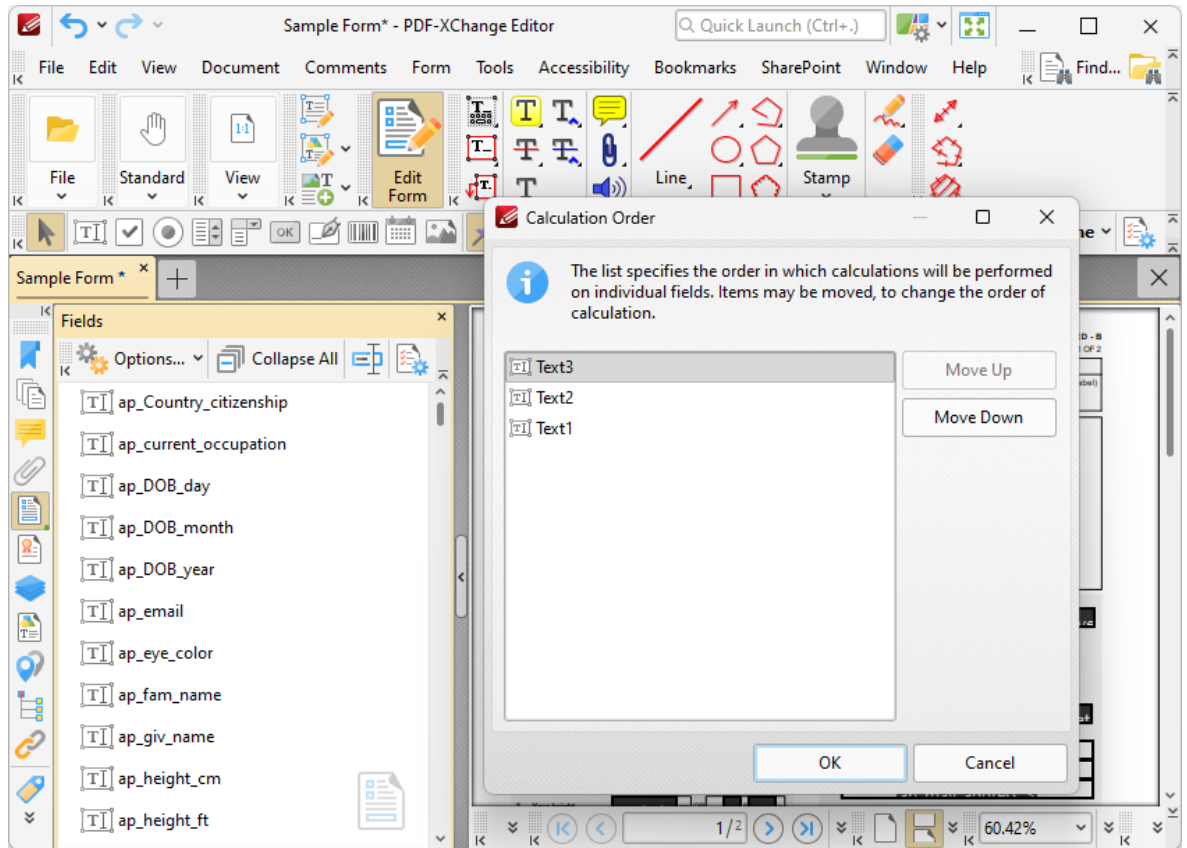
Figure 21. Calculation Order Dialog Box

The **Calculation Order** dialog box displays all form fields that contain value calculations. The order from top to bottom is the order in which calculations are performed. Click to select form fields and then click **Move Up/Move Down** to move fields up or down in the list.

5.3.1.2.2 Add Check Boxes to Documents

Add Check Boxes to Documents

Check boxes enable users to select predefined options:
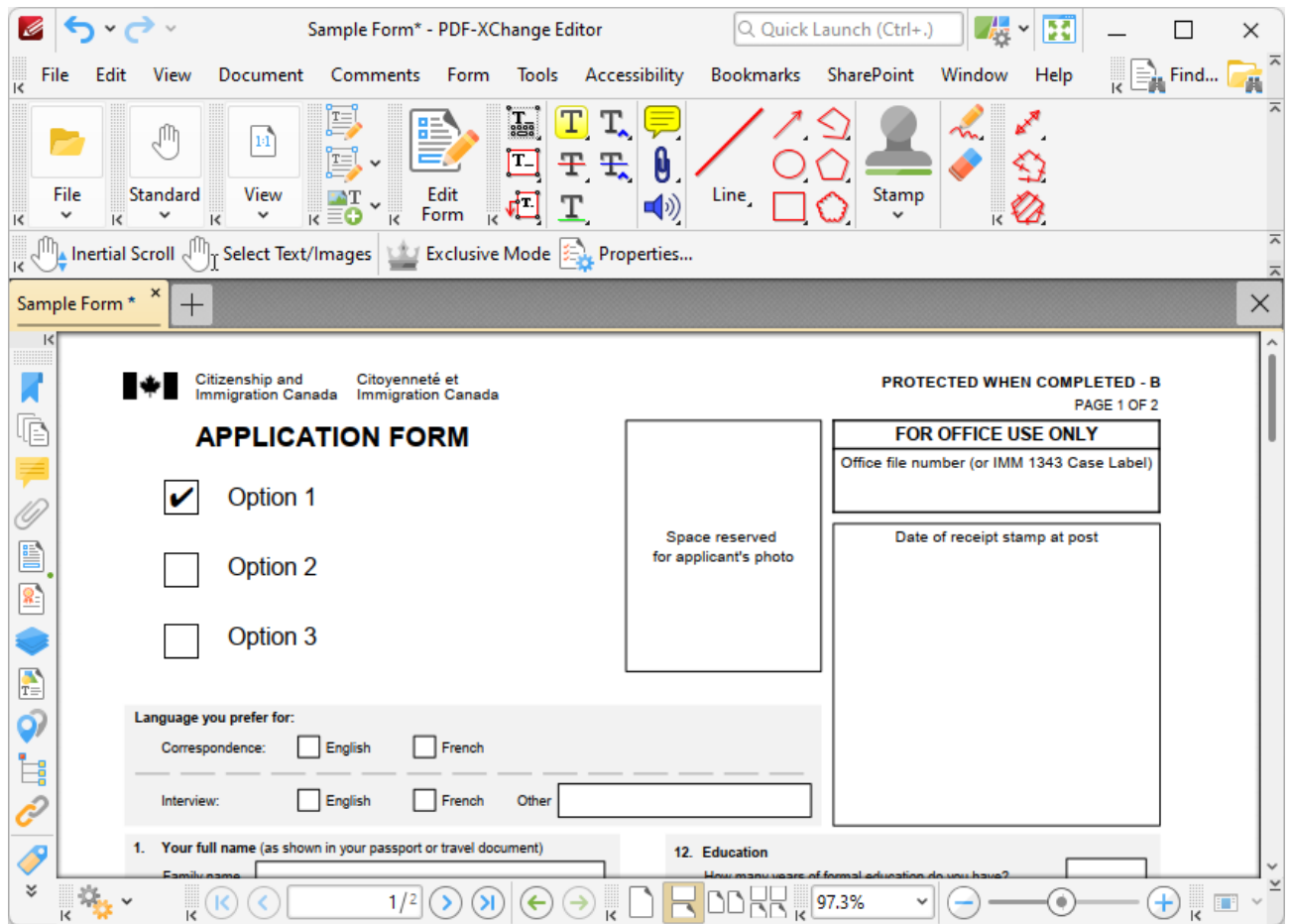
Figure 1. Example Check Boxes

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for check boxes. Click the dropdowns for further information:

▼ **Add Check Boxes to Documents**

1. Click **Edit Form,** then click the **Check Box** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue square will be displayed at the location of the pointer. This square represents the check box:

Figure 2. Active Check Box Tool

2. Move the square to the desired location and then click to add the check box to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of check boxes). Added check boxes appear as below:
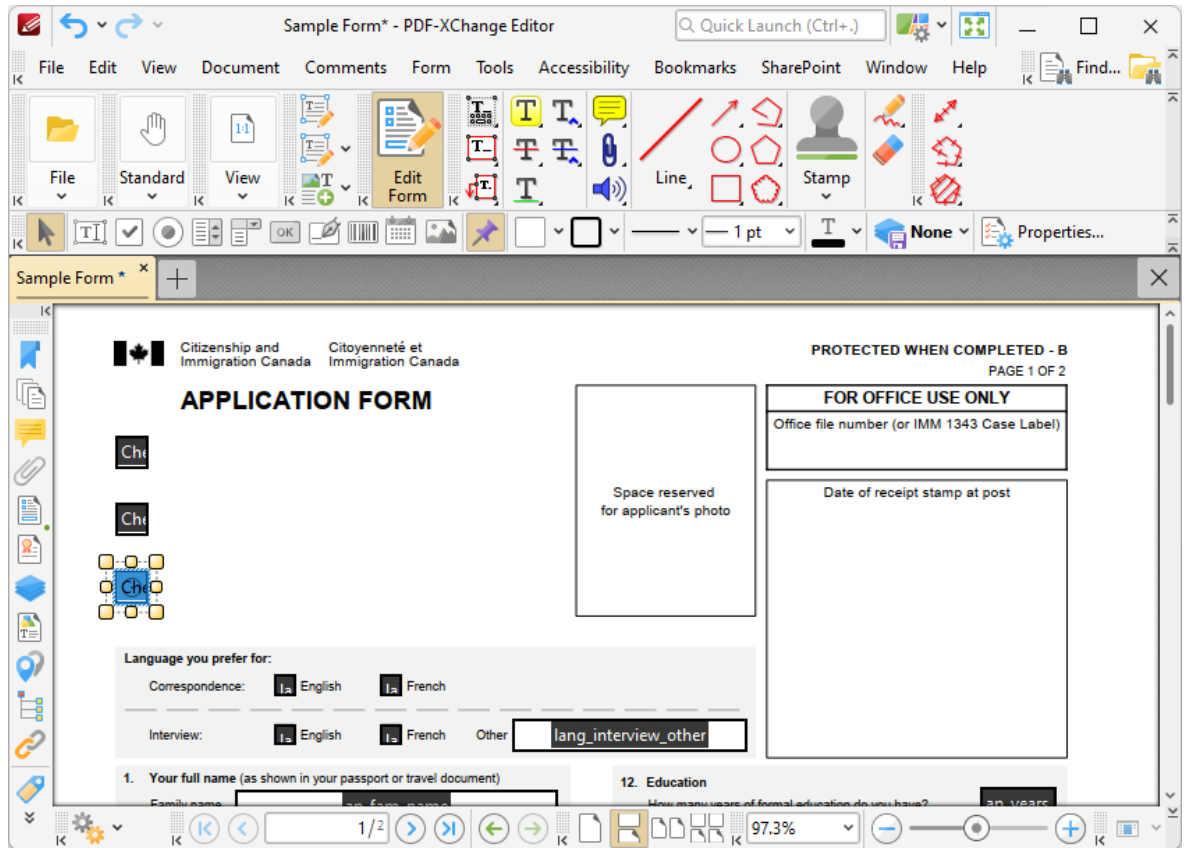
Figure 3. Added Check Boxes

- Click and drag the yellow control points to resize check boxes.
- Use the options in the **Properties Toolbar** [485] to determine the style and appearance of check boxes:
  - **Fill Color** determines the color used to fill check boxes.
  - **Stroke Color** determines the border color of check boxes.
  - **Border Style** determines the style of check box borders.
  - **Border Width** determines the width of check box borders.
  - **Text Color** determines the color of the tick when check boxes are selected.
  - **Properties** launches the **Check Box Properties** pane, which enables the customization of additional elements of check boxes.

▼ **The Check Box Properties Pane**
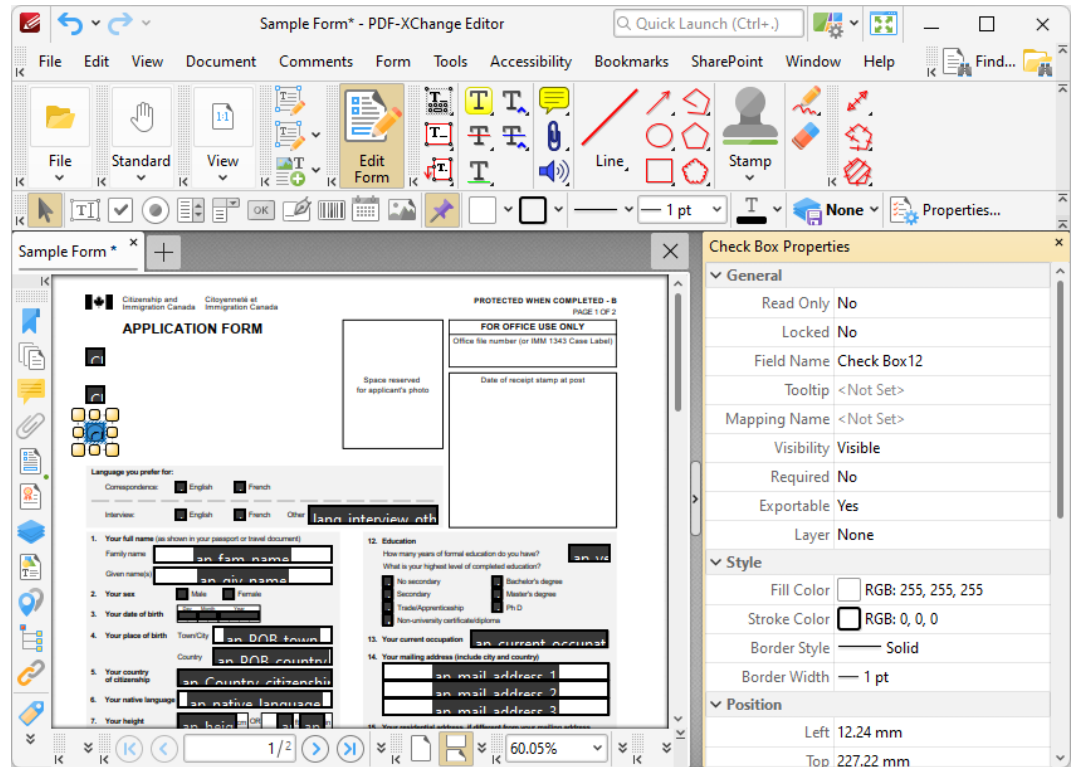
Figure 4. Check Box Tool, Check Box Properties Pane

The **Check Box Properties** pane can be used to determine a range of style and functionality options for check boxes. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to check boxes, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for check boxes:

The **General** properties determine the general parameters of check boxes:
- **Read Only** determines whether or not the check box can be edited.
- **Locked** determines whether or not the check boxes can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the check box. This name is present when the **Edit Form** tool is selected, and when check boxes are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the check box.
- **Mapping Name** determines the mapping name that the check box uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.
- **Orientation** determines the orientation of the check box.
- **Visibility** determines the visibility of the check box.
- **Required** determines whether or not the check box is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the check box data can be exported from the form.
- **Layer** determines the optional content layer to which the check box belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of check boxes. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of check boxes:
- **Left** determines the distance of the check box from the left margin.
- **Top** determines the distance of the check box from the bottom of the page.
- **Width/Height** determine the width/height of the check box.

The **Default Text Format** properties determine the default properties when text is entered into the check box:
- **Font Size** is always set to **auto** for check boxes. This is because the font size refers to the size of the tick when check boxes are selected, and the tick must be proportionate to the size of the check box.
- **Text Color** determines the color of the tick when check boxes are selected.

The **Options** properties determine additional options for check boxes:
- **Check Box Style** determines the icon used when check boxes are selected.
- **Export Value** determines the value that represents check boxes when they are exported.
- **Checked by Default** determines whether or not the check box is checked by default.

The **Actions** properties determine the action taken when users interact with the check box:
- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the check box.

- **Mouse Leave** initiates an action when the pointer moves out of the check box.
- **On Focus** initiates an action when the check box is selected.
- **On Blur** initiates an action when the check box is deselected.
- Click the ellipsis icon on the right of actions to add/edit check box actions:
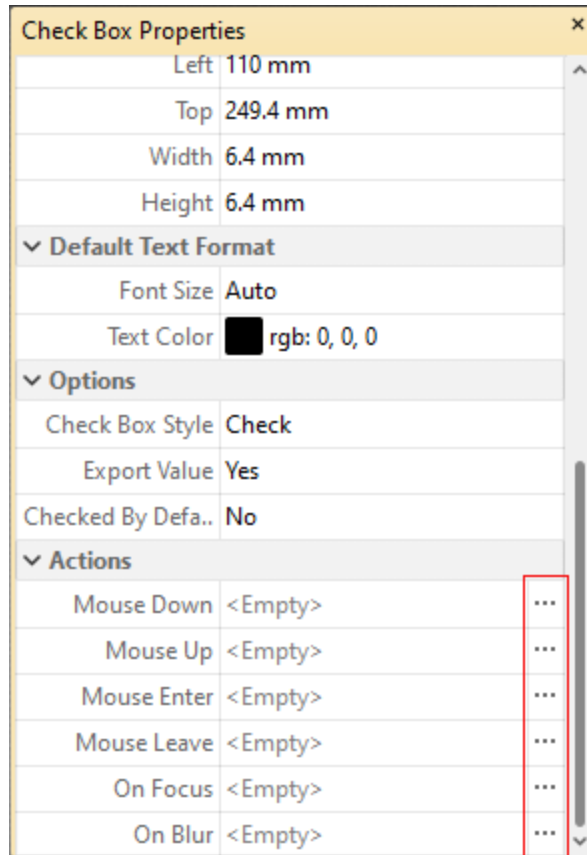
Figure 5. Check Box Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

▼ Example Check Box List Creation

The following example will detail how to create a check box list for the months of the year:

1. Click **Edit Form,** then click the **Check Box** and **Keep Mode** icons in the **Form Toolbar** (these locations are highlighted in the image below):

Figure 6. Check Box Creation Tool

2. Press Ctrl+' to enable the grid in order to assist in the accurate placement of check boxes, then click to place check boxes in the document:

Figure 7. Adding Check Boxes

The next step is to add labels for the check boxes:

3. Click **Add,** then click **Add Text**:
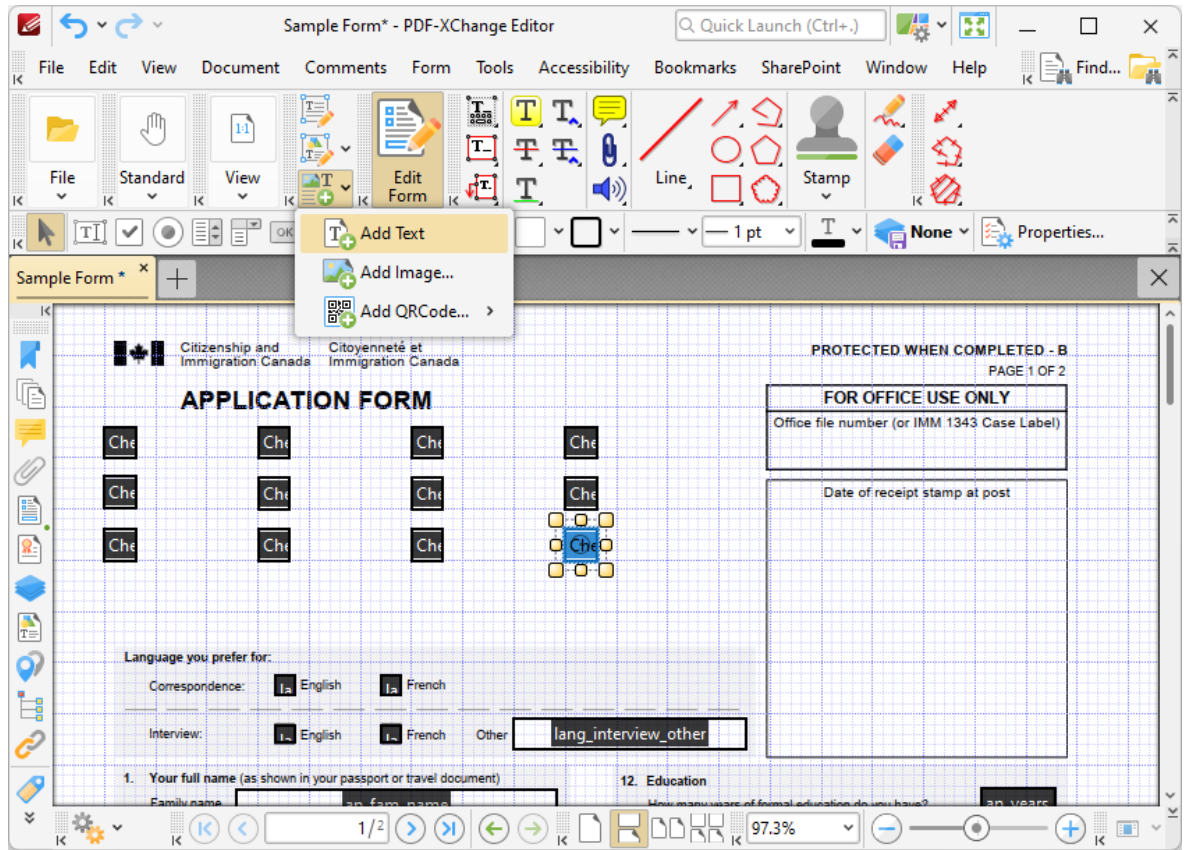
Figure 8. Comment Toolbar, Text Box Tool Selected

4. Click to add text boxes, then enter the names of the months of the year:
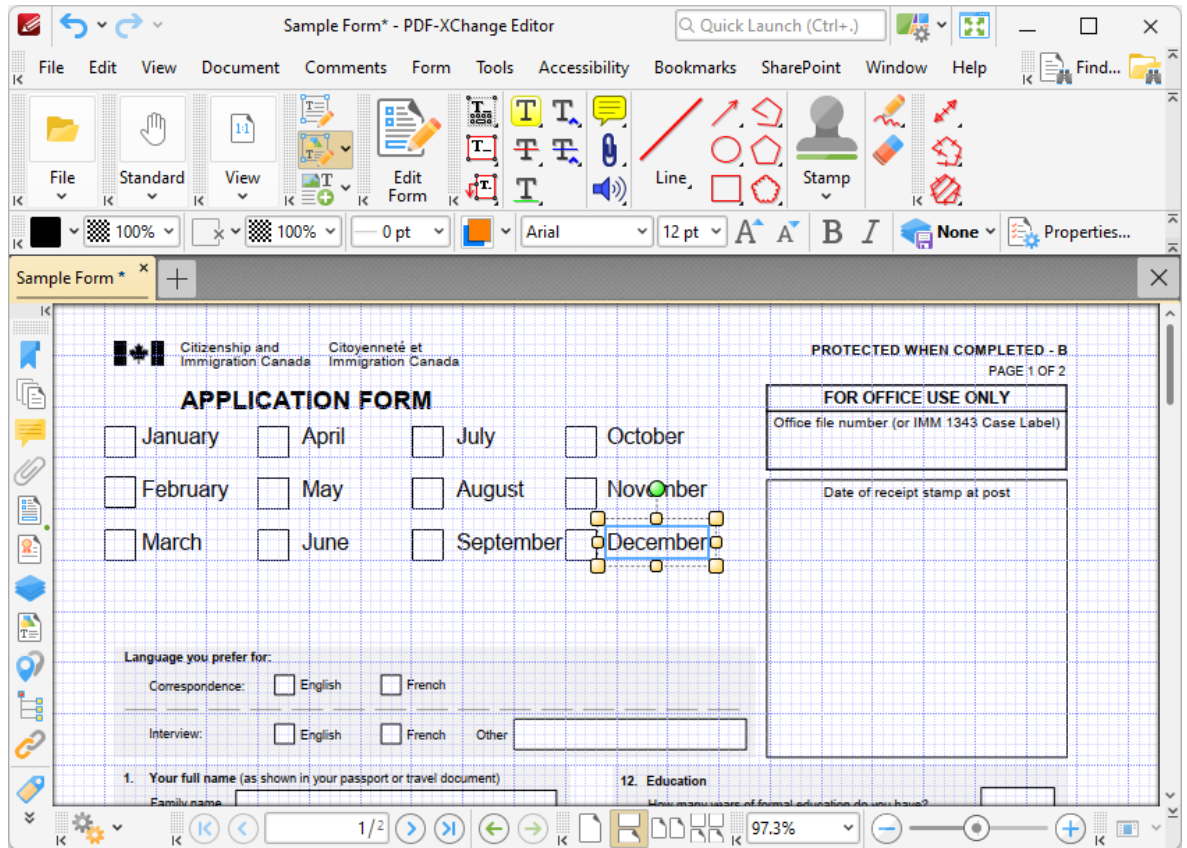
Figure 9. Added Text Box Labels

5. Press Ctrl+' to disable the grid. The check box list is then complete. Click **Standard,** then click the **Hand Tool** to select check boxes:

Figure 10. Completed Check Box List

5.3.1.2.3 Add Radio Buttons to Documents

Add Radio Buttons to Documents

Radio buttons enable users to make a single choice from several options, such as in answers to multiple choice questions:

Figure 1. Example Radio Buttons

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for radio buttons, as detailed below. Click the dropdowns for further information:

▼ **Add Radio Buttons to Documents**

1. Click **Edit Form,** then click the **Radio Button** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue square will be displayed at the location of the pointer. This square represents the radio button:
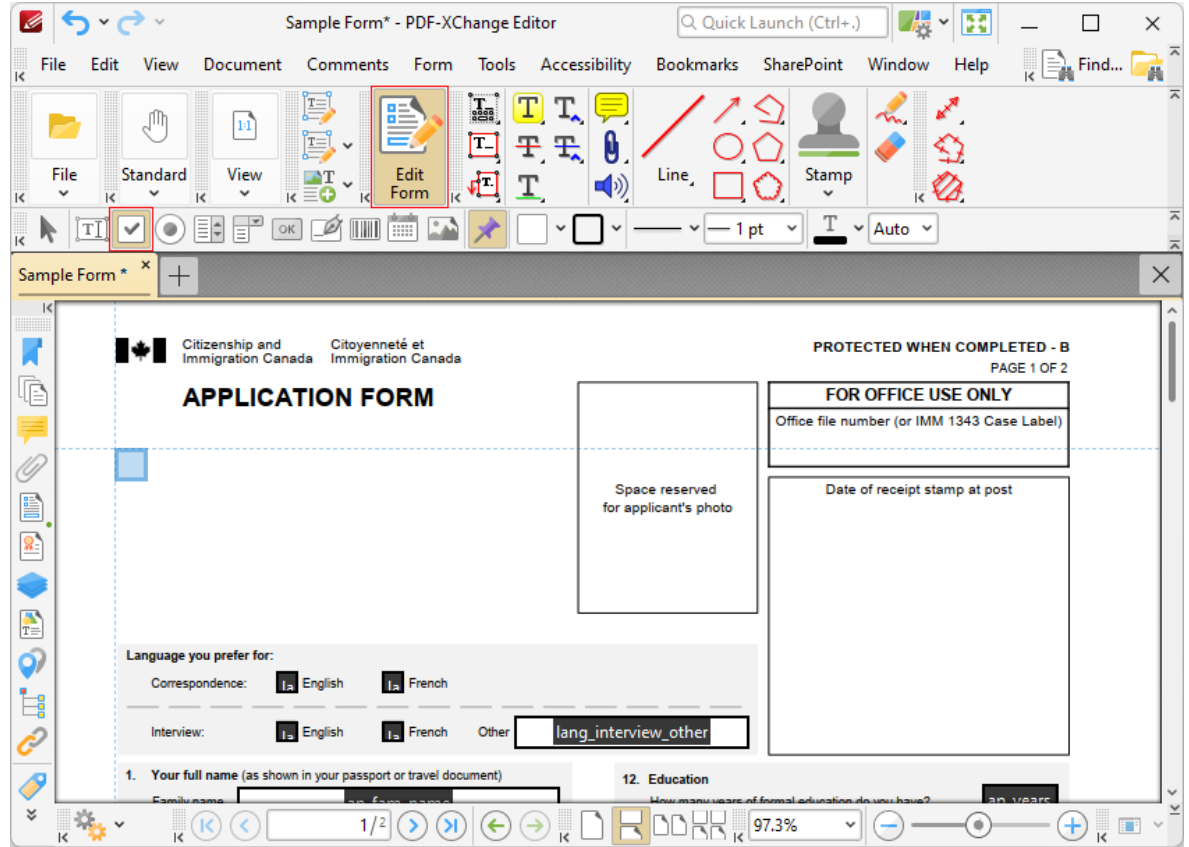

Figure 2. Active Radio Button Tool

2. Move the square to the desired location and then click to add the radio button to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of radio buttons). Added radio buttons appear as detailed below:

Figure 3. Added Radio Buttons

- Click and drag the yellow control points to resize radio buttons.
- Use the options in the **Properties Toolbar** [485] to determine the style and appearance of radio buttons:
  - **Fill Color** determines the color used to fill radio buttons.
  - **Stroke Color** determines the border color of radio buttons.
  - **Border Style** determines the style of radio button borders.
  - **Border Width** determines the width of radio button borders.
  - **Text Color** determines the color of the mark when radio buttons are selected.
  - **Properties** launches the **Radio Button Properties** pane, which enables the customization of additional elements of radio buttons.

▼ **The Radio Button Properties Pane**

Figure 4. Radio Button Tool, Radio Button Properties Pane

The **Radio Button Properties** pane can be used to determine a range of style and functionality options for radio buttons. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to radio buttons, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for radio buttons:

The **General** properties determine the general parameters of radio buttons:
- **Read Only** determines whether or not the radio button can be edited.
- **Locked** determines whether or not the radio buttons can be moved, and whether or not their properties can be modified.
- **Field Name** determines the name of the radio button. This name is present when the **Edit Form** tool is selected, and when radio buttons are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the radio button.
- **Mapping Name** determines the mapping name that the radio button uses. This name is used to reference interactive form data when the form is

exported, and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of the radio button.
- **Visibility** determines the visibility of the radio button.
- **Required** determines whether or not the radio button is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the radio button data can be exported from the form.
- **Layer** determines the optional content layer to which the radio button belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of radio buttons. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of radio buttons:

- **Left** determines the distance of the radio button from the left margin.
- **Top** determines the distance of the radio button from the bottom of the page.
- **Width/Height** determine the width/height of the radio button.

The **Default Text Format** properties determine the default properties when text is entered into the radio button:

- **Font Size** is always set to **auto** for radio buttons. This is because the font size refers to the size of the mark when radio buttons are selected, and the mark must be proportionate to the size of the radio button.
- **Text Color** determines the color of the tick when radio buttons are selected.

The **Options** properties determine additional options for radio buttons:

- **Radio Button Style** determines the icon used when radio buttons are selected.
- **Button Choice** is a unique identifier for the radio button and differentiates it from other radio buttons that have the same name.
- **In Unison** enables single-click selection for all radio buttons that share the same name and content as the selected radio button.
- **Checked by Default** determines whether or not the radio button is checked by default.

The **Actions** properties determine the action taken when users interact with the radio button:

- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the radio button.
- **Mouse Leave** initiates an action when the pointer moves out of the radio button.
- **On Focus** initiates an action when the radio button is selected.
- **On Blur** initiates an action when the radio button is deselected.
- Click the ellipsis icon on the right of actions to add/edit radio button actions:
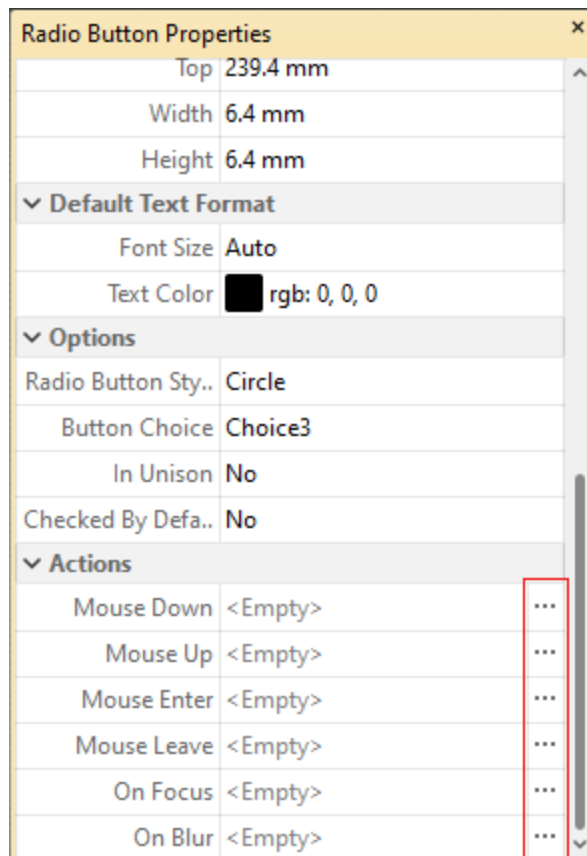
Figure 5. Radio Button Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** ⁹⁹¹

▼ Example Radio Button List Creation

The following example will detail how to create a radio button list of countries:

1. Click **Edit Form,** then click the **Radio Button** and **Keep Mode** icons in the **Form Toolbar** (these locations are highlighted in the image below):
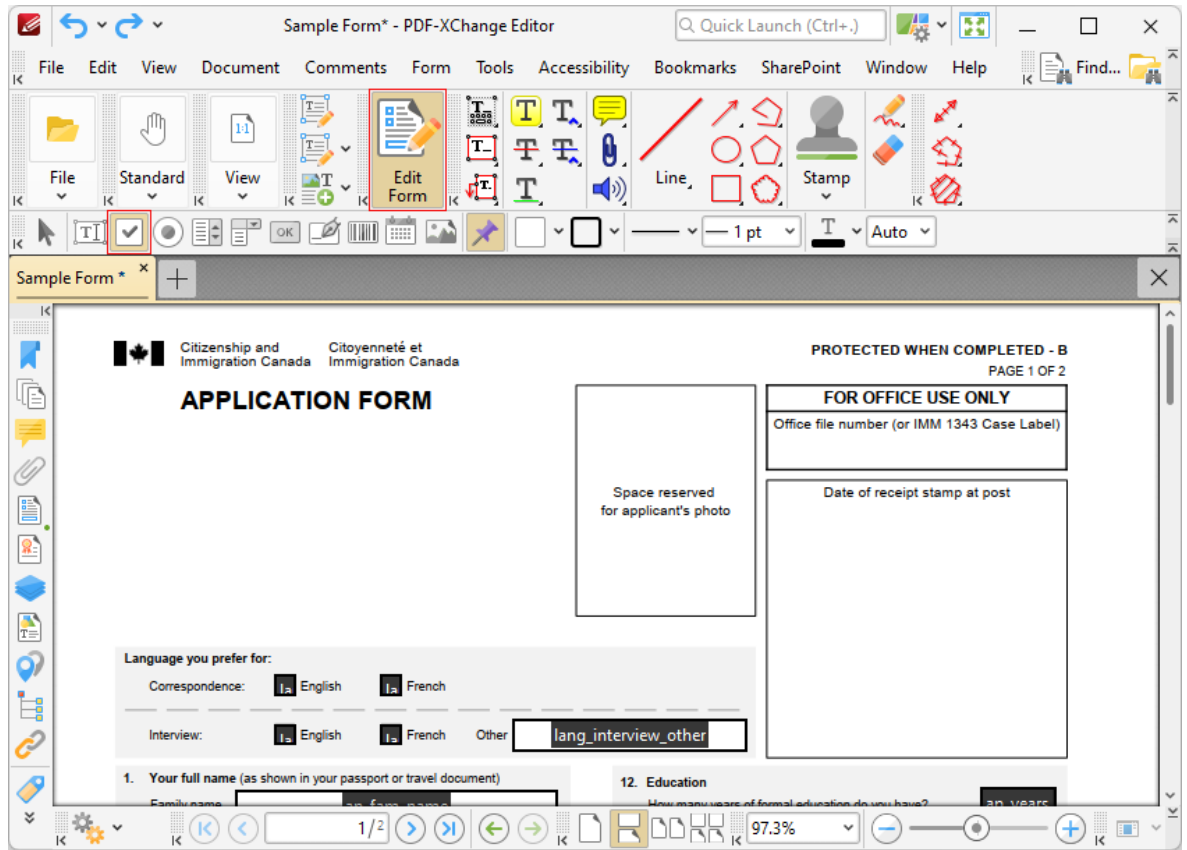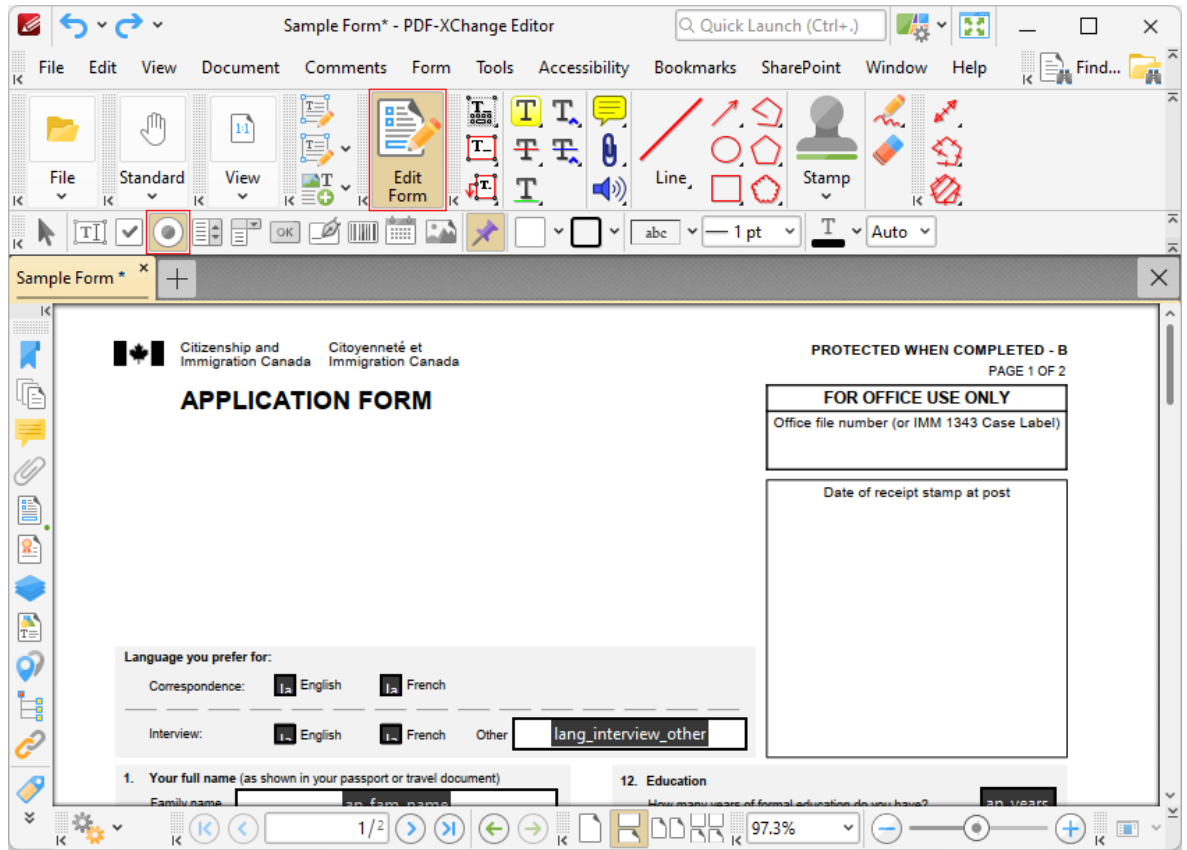
Figure 6. Radio Button Creation Tool

2. Press Ctrl+' to enable the grid in order to assist in the accurate placement of radio buttons, then click to place radio buttons in the document:
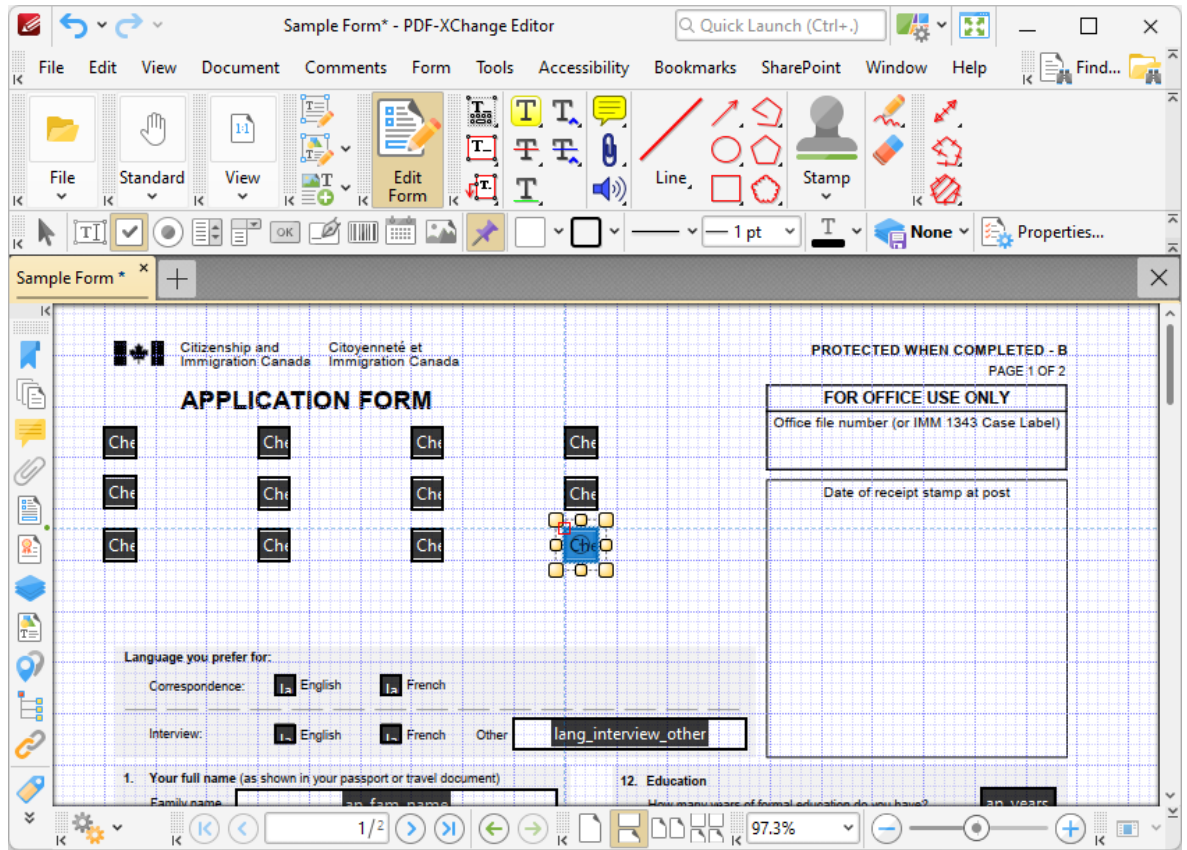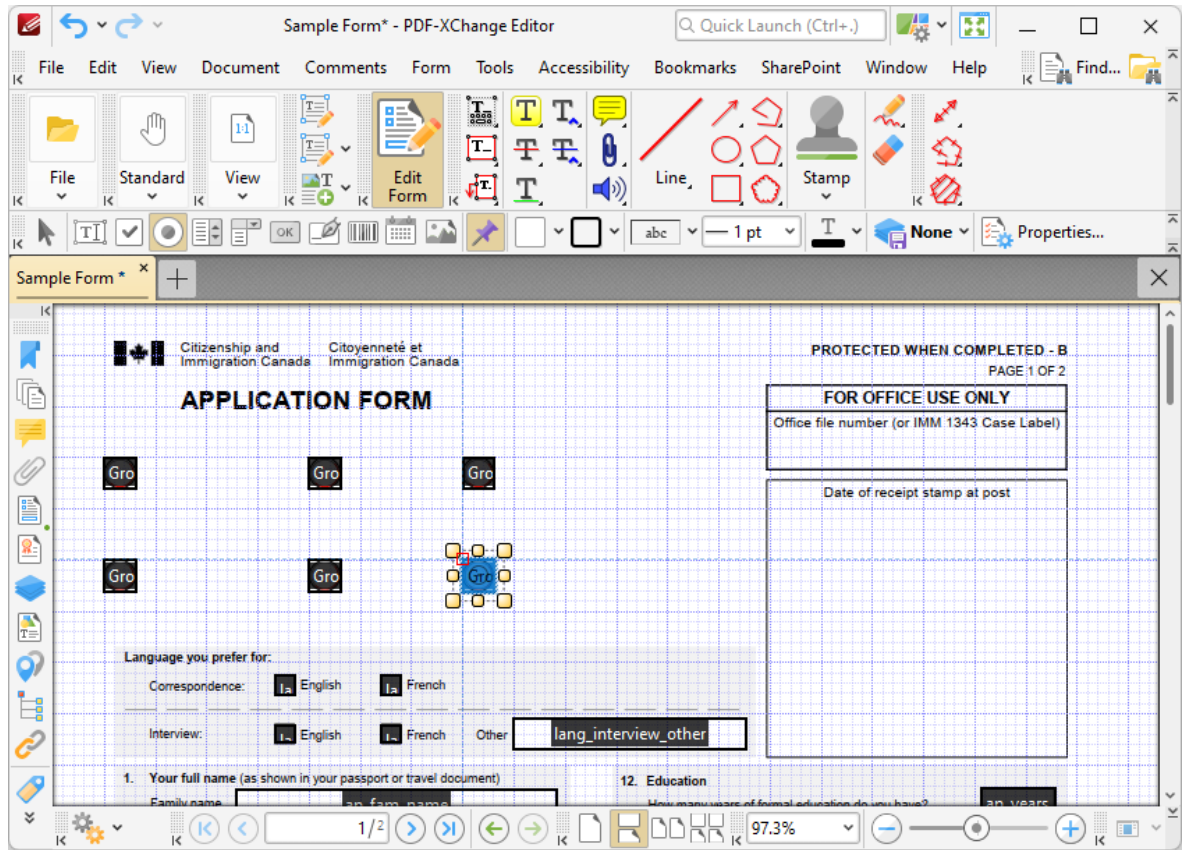
Figure 7. Adding Radio Buttons

The next step is to add text labels for the radio buttons:

3. Click **Add,** then click **Add Text:**
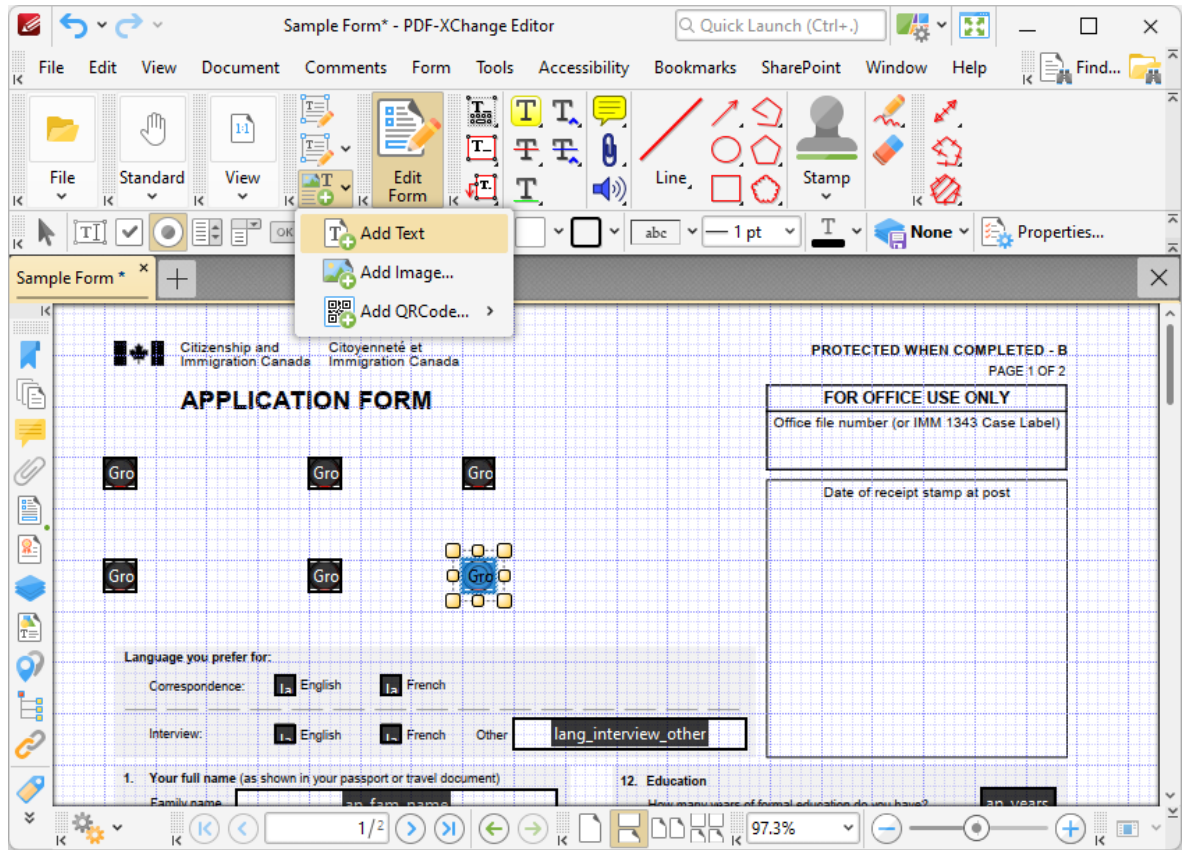
Figure 8. Comment Toolbar, Text Box Tool Selected

4. Click to add text, then enter the names of the desired countries in the boxes:
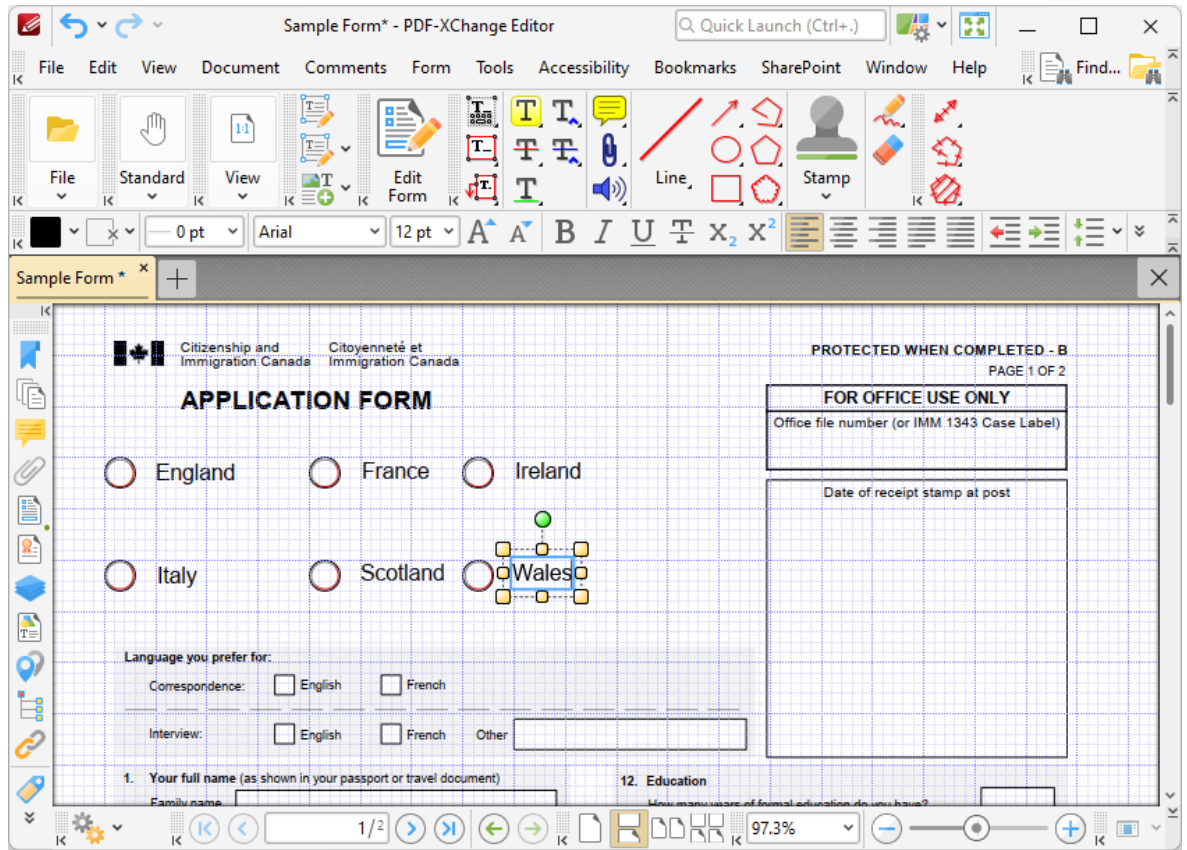
Figure 9. Added Text Box Labels

7. Press Ctrl+' to disable the grid. The radio button list is then complete. Click **Standard,** then click the **Hand Tool** to select radio buttons
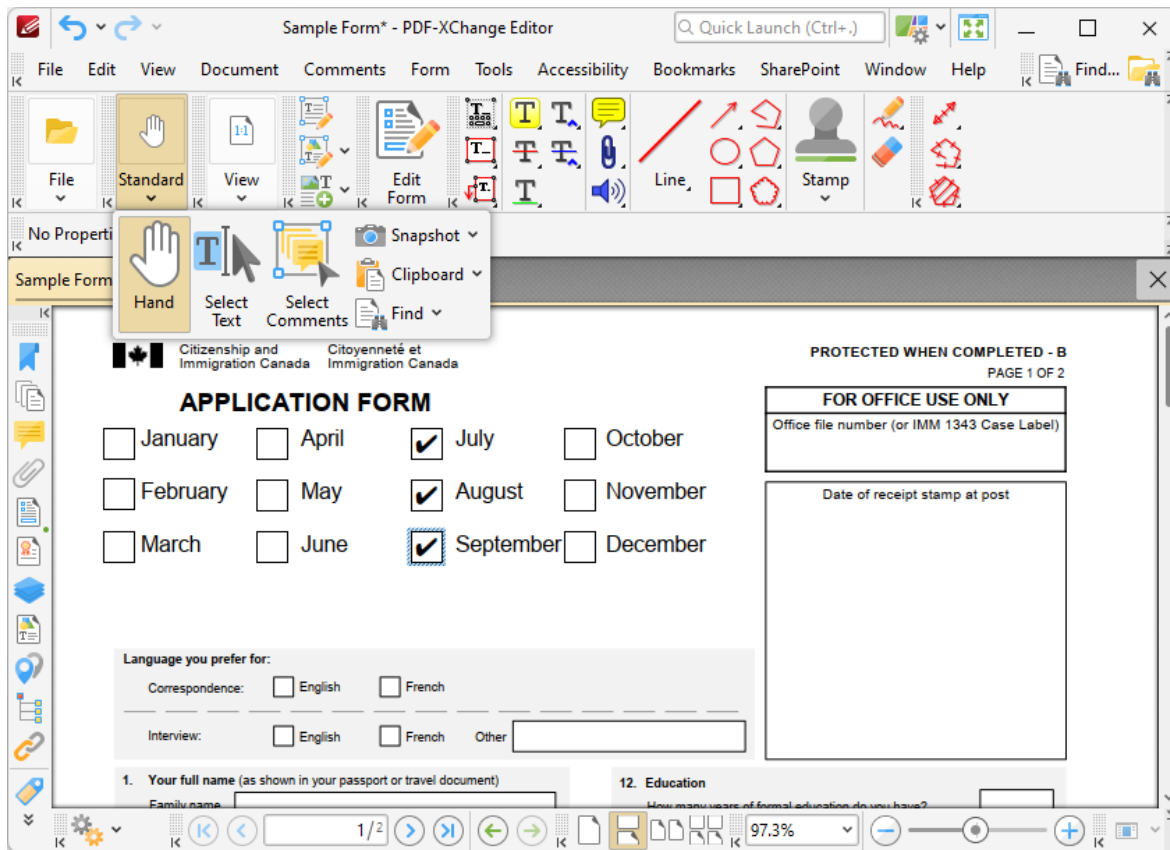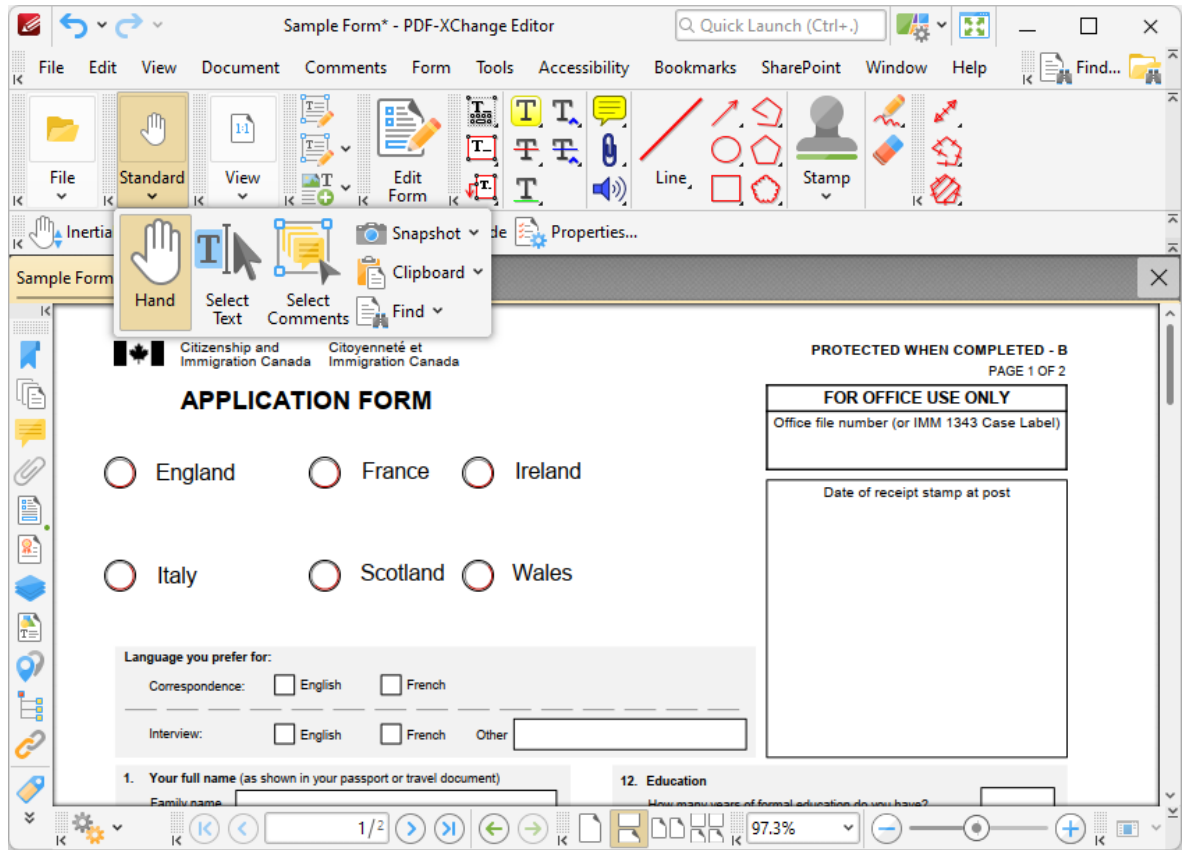
Figure 10. Completed Radio Button List

5.3.1.2.4 Add List Boxes to Documents

Add List Boxes to Documents

List boxes enable users to select one or more options from a fixed list of options:
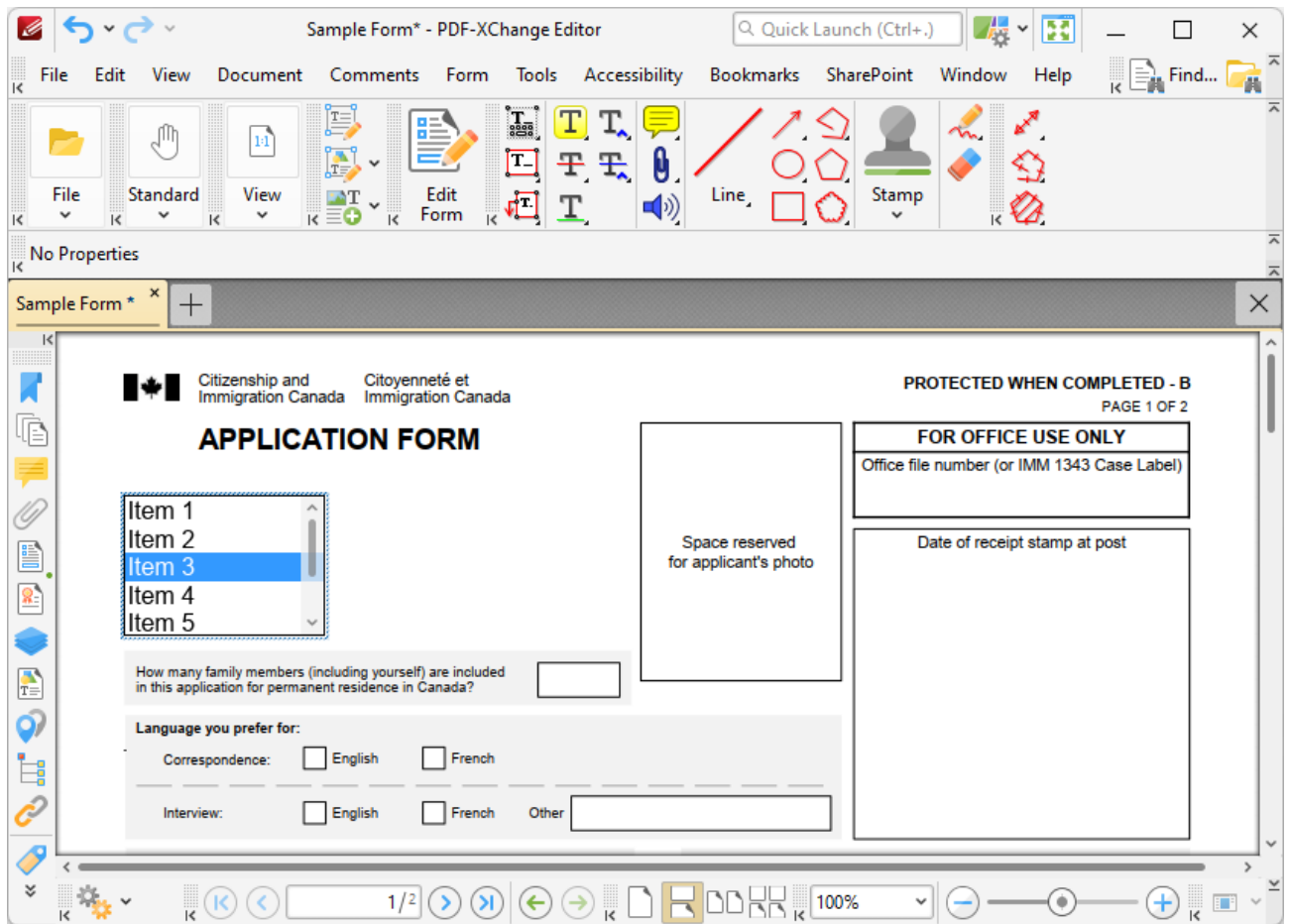
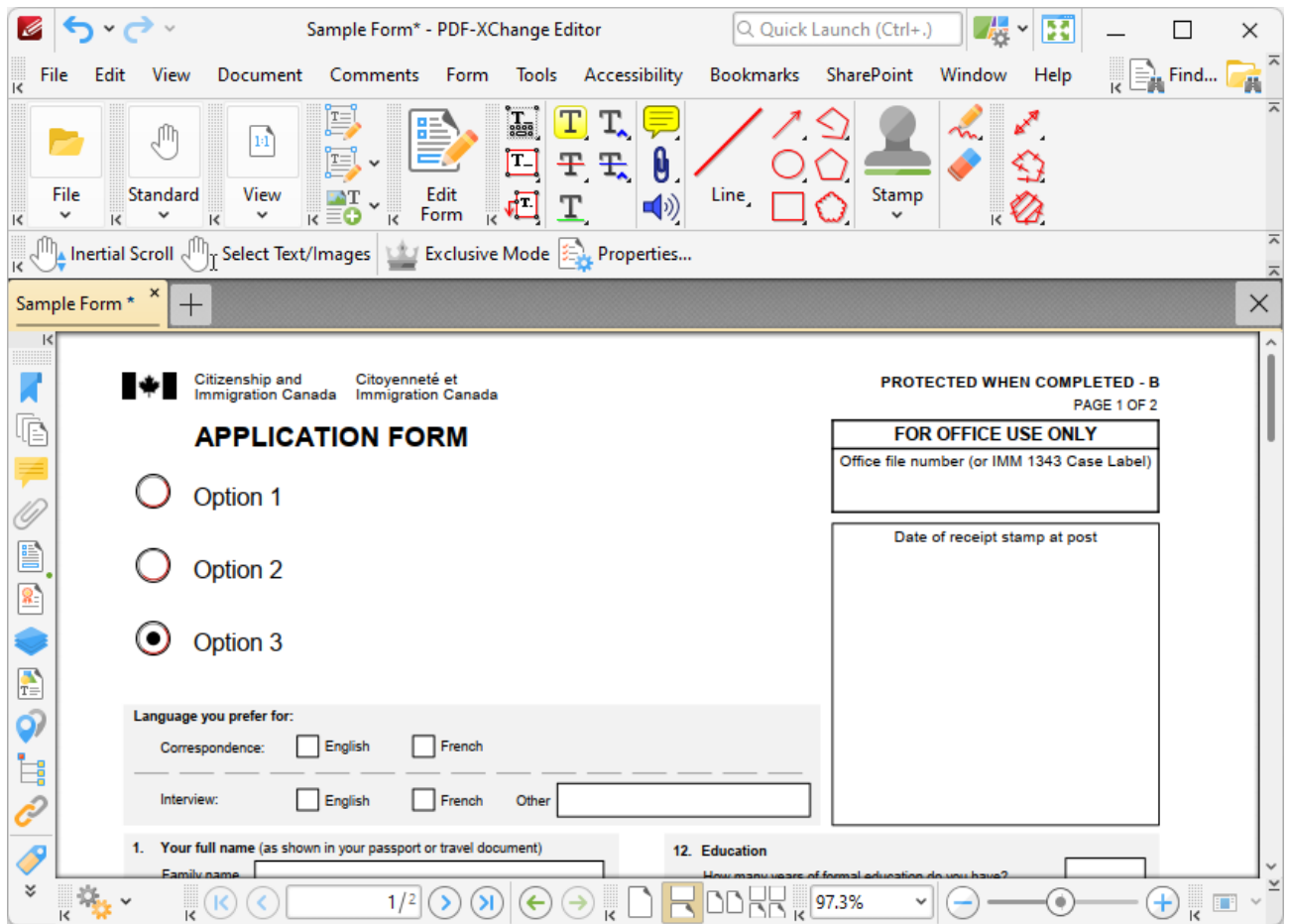**Figure 1.** Example List Box

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for list boxes, as detailed below. Click the dropdowns for further information:

▼ **Add List Boxes to Documents**

1. Click **Edit Form,** then click the **List Box** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the list box:
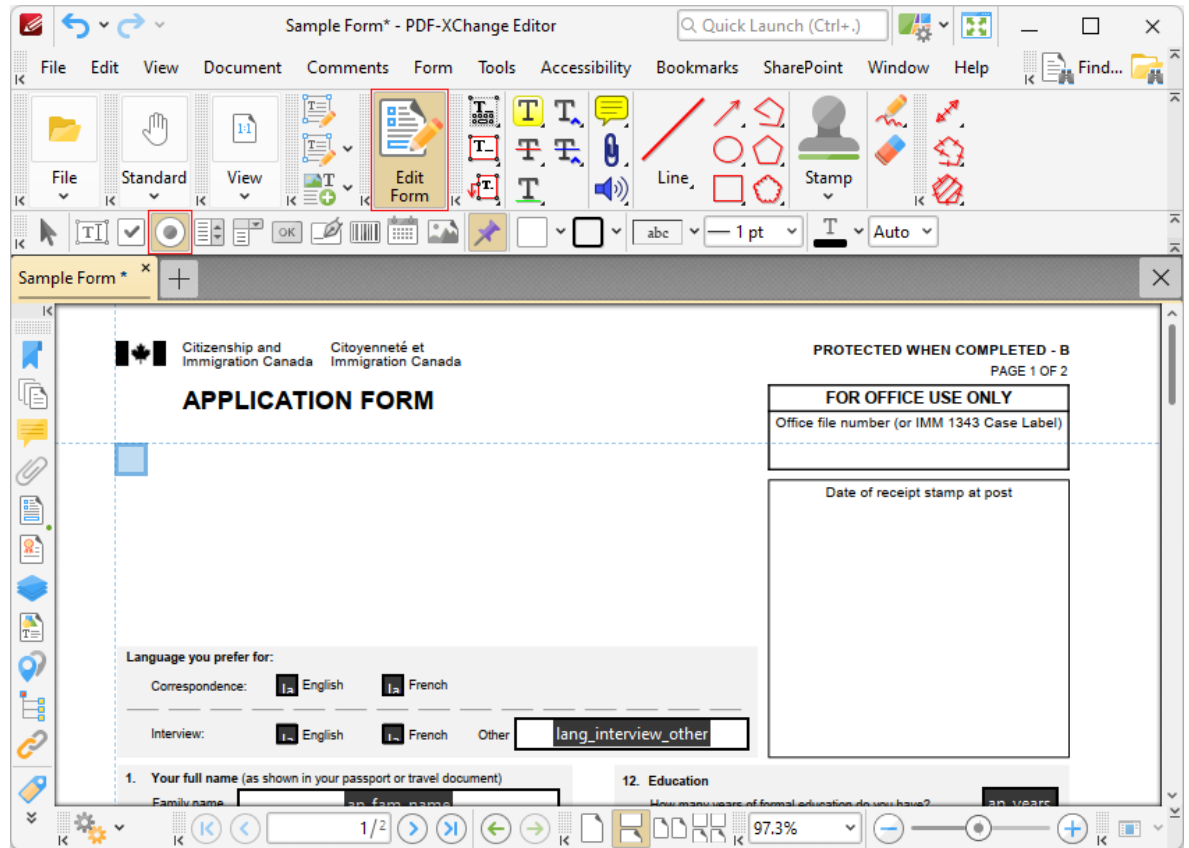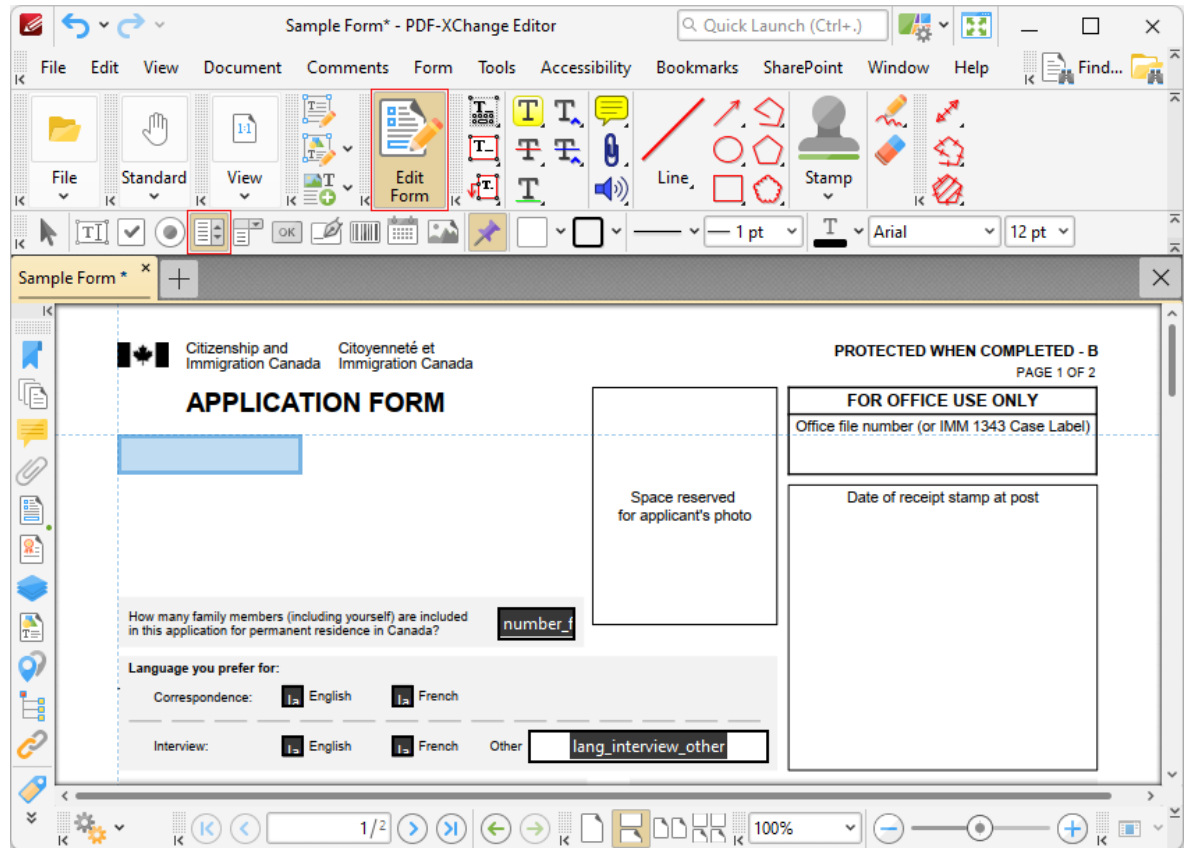

Figure 2. Active List Box Tool

2. Move the rectangle to the desired location and then click to add the list box to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of list boxes). Added list boxes appear as detailed below:
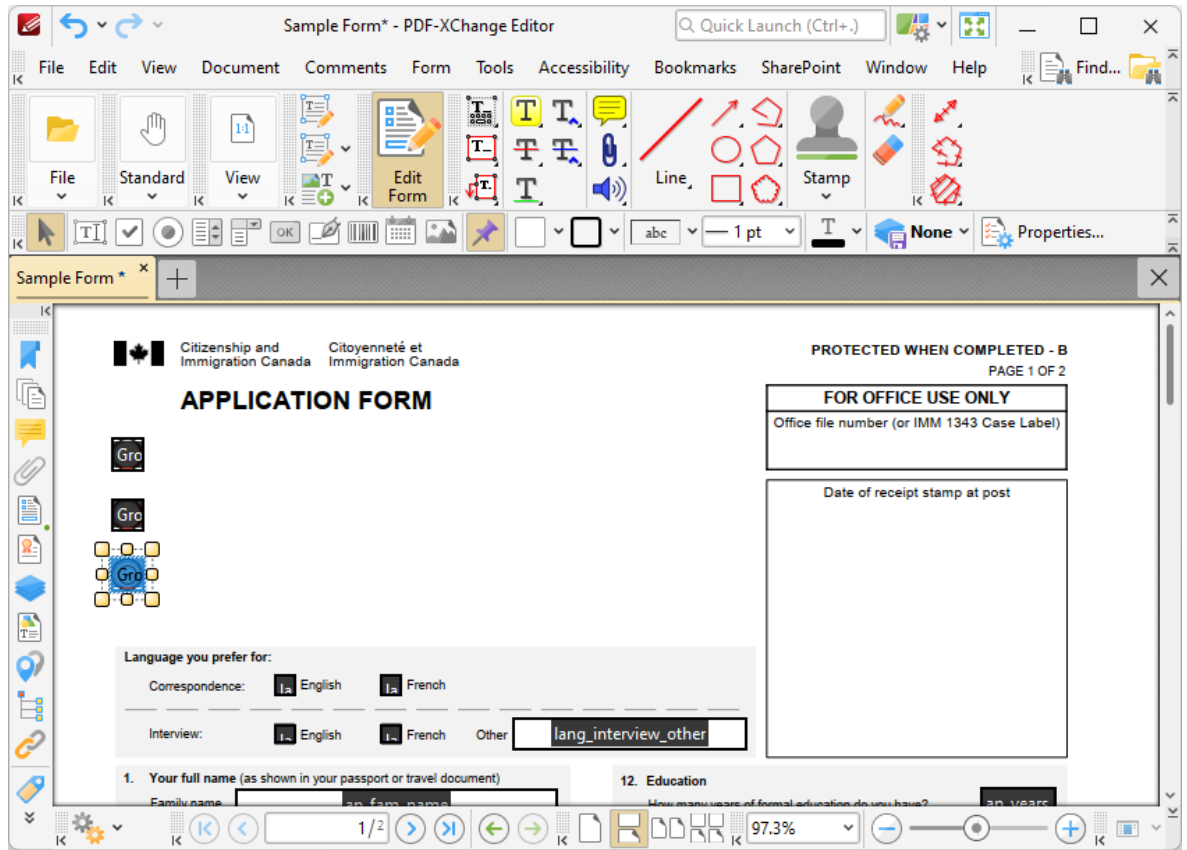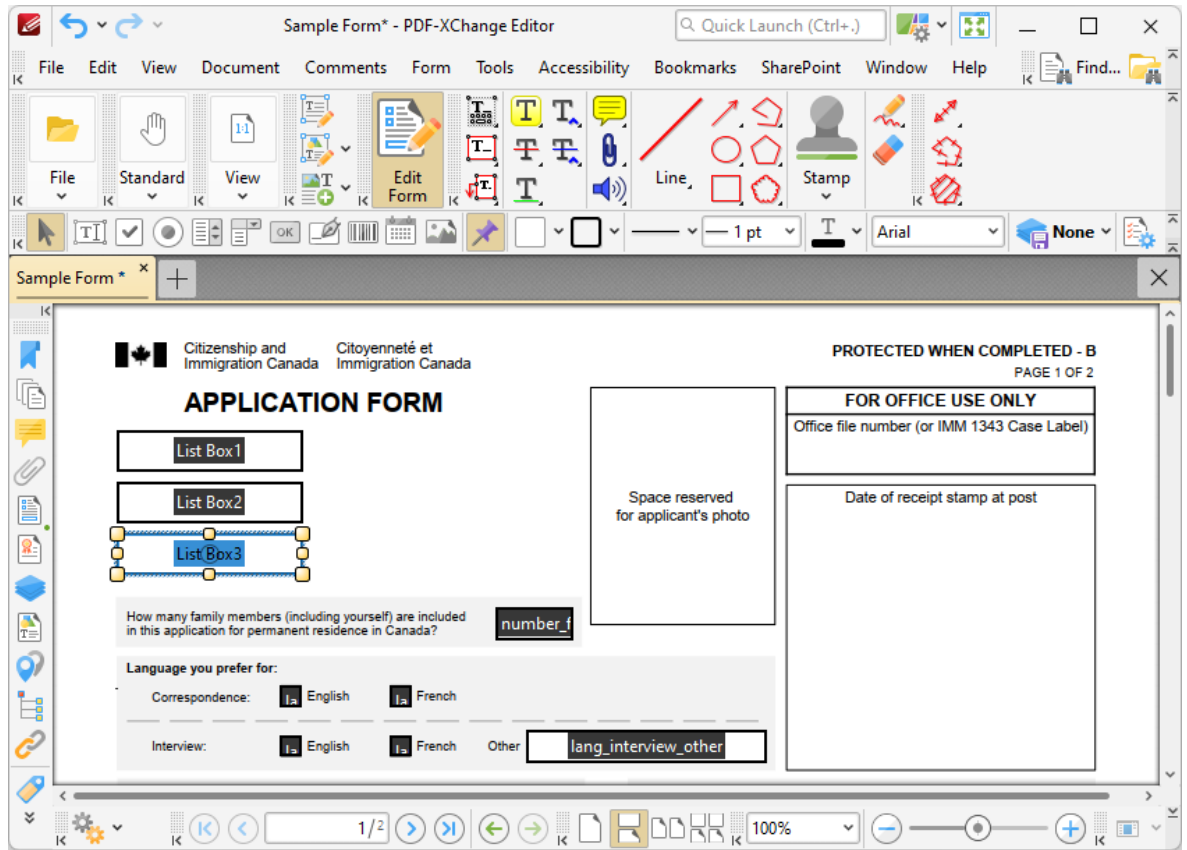
Figure 3. Added List Boxes

- Click and drag the yellow control points to resize list boxes.
- Use the options in the **Properties Toolbar** [485] to determine the style and appearance of list boxes:
    - **Fill Color** determines the color used to fill list boxes.
    - **Stroke Color** determines the border color of list boxes.
    - **Border Style** determines the style of list box borders.
    - **Border Width** determines the width of list box borders.
    - **Text Color** determines the color of the text in list boxes.
    - **Font** determines the font used in list boxes.
    - **Properties** launches the **List Box Properties** pane, which enables the customization of additional elements of list boxes.

▼ **The List Box Properties Pane**

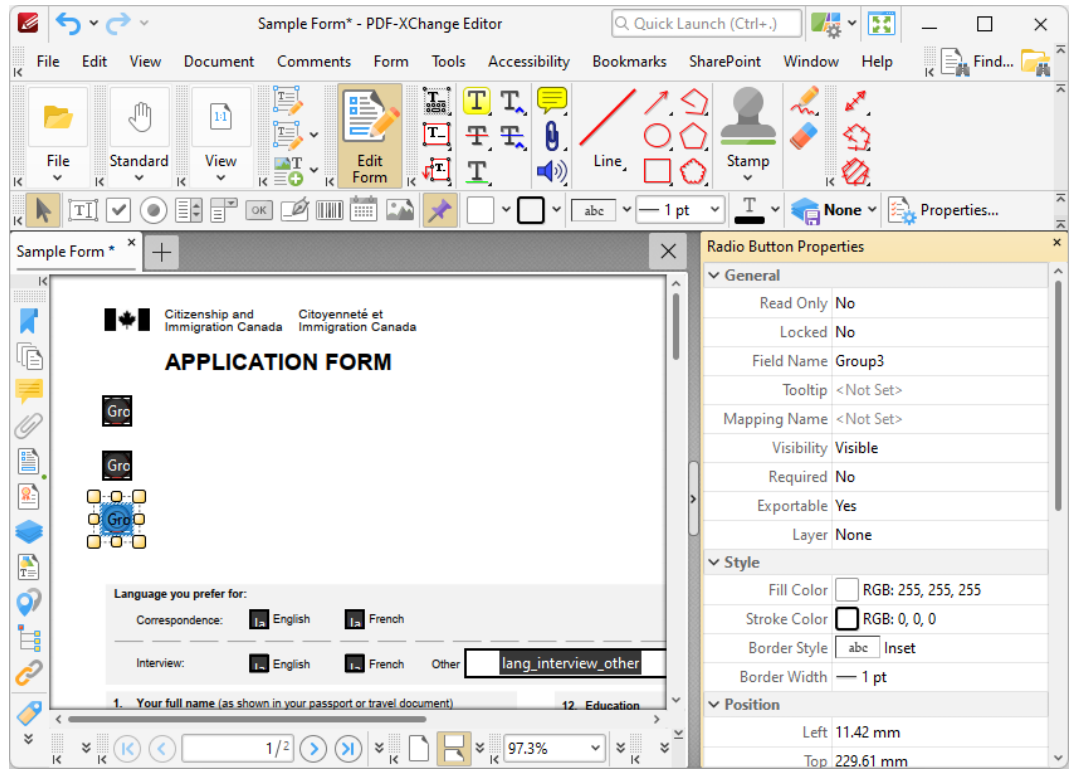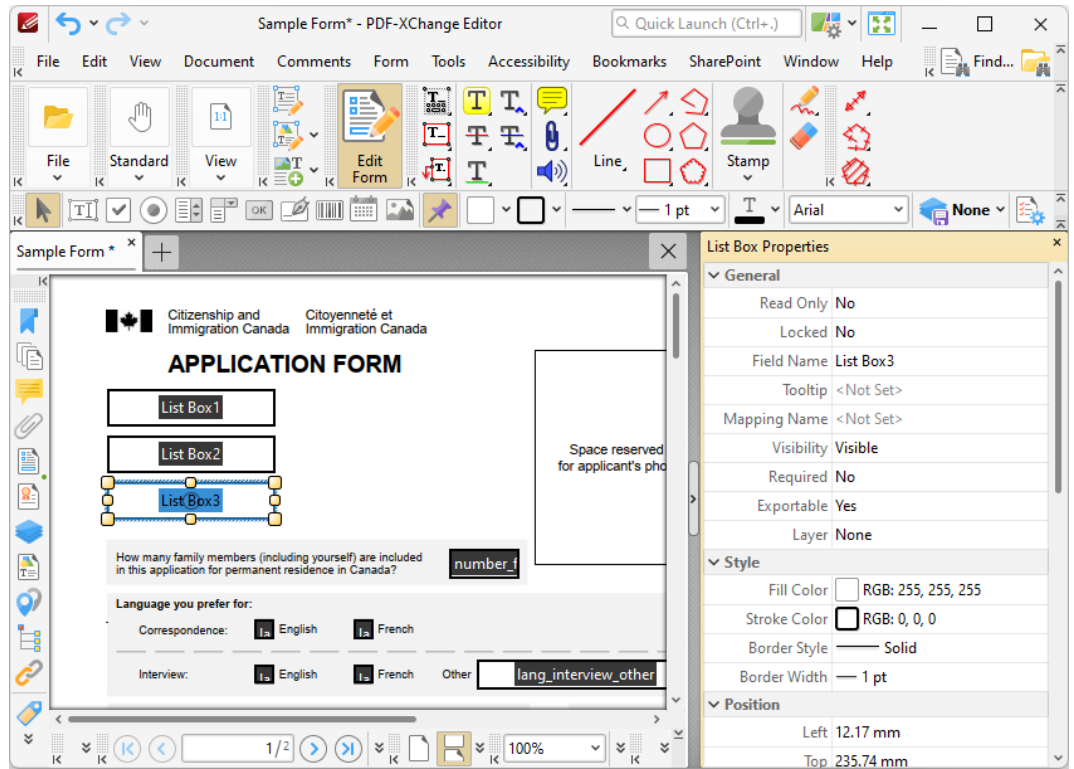**Figure 4.** List Box Tool, List Box Properties Pane

The **List Box Properties** pane can be used to determine a range of style and functionality options for list boxes. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to list boxes, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for list boxes:

The **General** properties determine the general parameters of list boxes:

- **Read Only** determines whether or not the list box can be edited.
- **Locked** determines whether or not the list box can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the list box. This name is present when the **Edit Form** tool is selected, and when list boxes are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the list box.
- **Mapping Name** determines the mapping name that the list box uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of the list box.
- **Visibility** determines the visibility of the list box.
- **Required** determines whether or not the list box is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the list box data can be exported from the form.
- **Layer** determines the optional content layer to which the list box belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** [535]

The **Style** properties determine stylistic elements of list boxes. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of list boxes:
- **Left** determines the distance of the list box from the left margin.
- **Top** determines the distance of the list box from the bottom of the page.
- **Width/Height** determine the width/height of the list box.

The **Default Text Format** properties determine the default properties when text is entered into the list box:
- **Font** determines the font used to create the list box entries.
- **Font Size** determine the size of the font used to create the list box entries.
- **Text Color** determines the color of the tick when list boxes are selected.

The **Options** properties determine additional options for list boxes:
- **List Box Items** determine the options in the list box. See below for an example on how to add/edit options in the list box.
- **Sort Items** arranges the listed items numerically and/or alphabetically. Note that numerical sorts are performed before alphabetical sorts in cases where both sorts apply.
- **Multiple Selection** enables the selection of multiple list box entries.
- **Immediately Commit** saves selected values as soon as they are selected. If this option is not enabled then the value is saved only when the user tabs out of the current field/clicks a different form field. Please note that this option is not available when the **Multiple Selection** property is enabled.

The **Actions** properties determine the action taken when users interact with the list box:
- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).

- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the list box.
- **Mouse Leave** initiates an action when the pointer moves out of the list box.
- **On Focus** initiates an action when the list box is selected.
- **On Blur** initiates an action when the list box is deselected.
- The **Selection Change** property initiates a JavaScript action when the selection in the list box is changed. Click the ellipsis icon to add custom JavaScript. The **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**
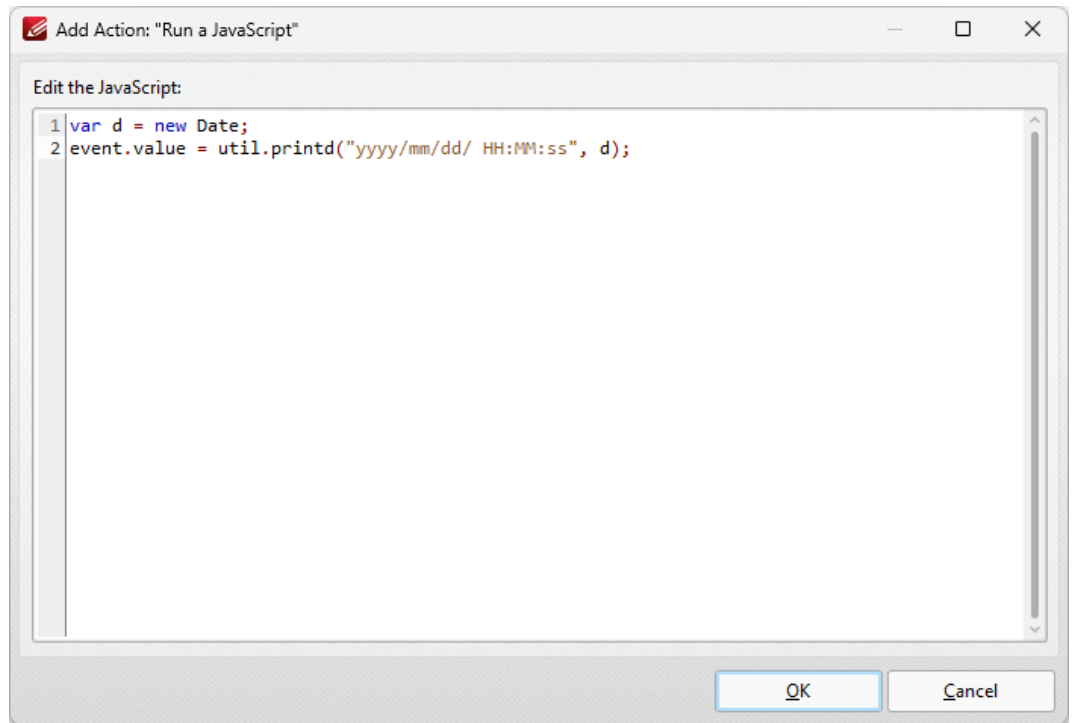
Figure 5. Edit Action: "Run a JavaScript" Dialog Box

Click the ellipsis icon on the right of actions to add/edit list box actions:
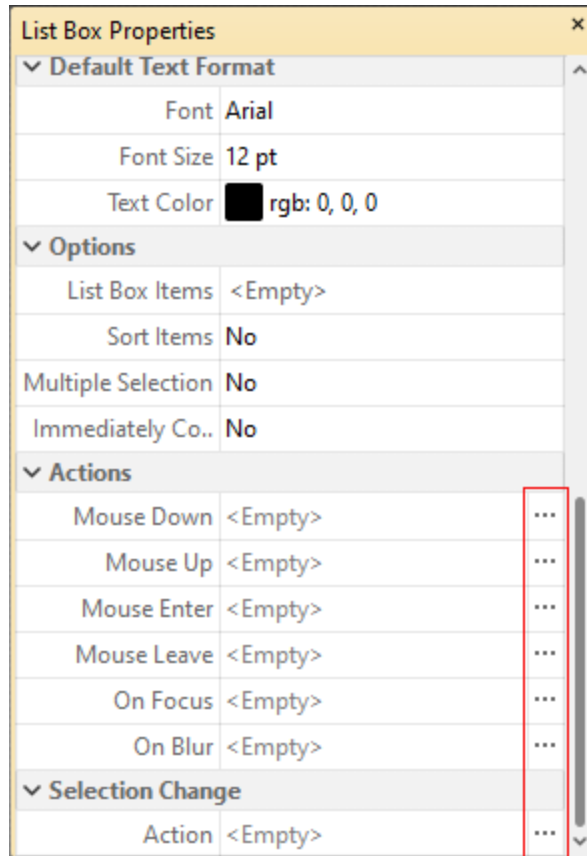
Figure 6. List Box Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

▼ **Adding and Editing List Box Items**

Follow the steps below to add/edit list box items:

1. Click **Edit Form,** then right-click the list box and click **Properties:**
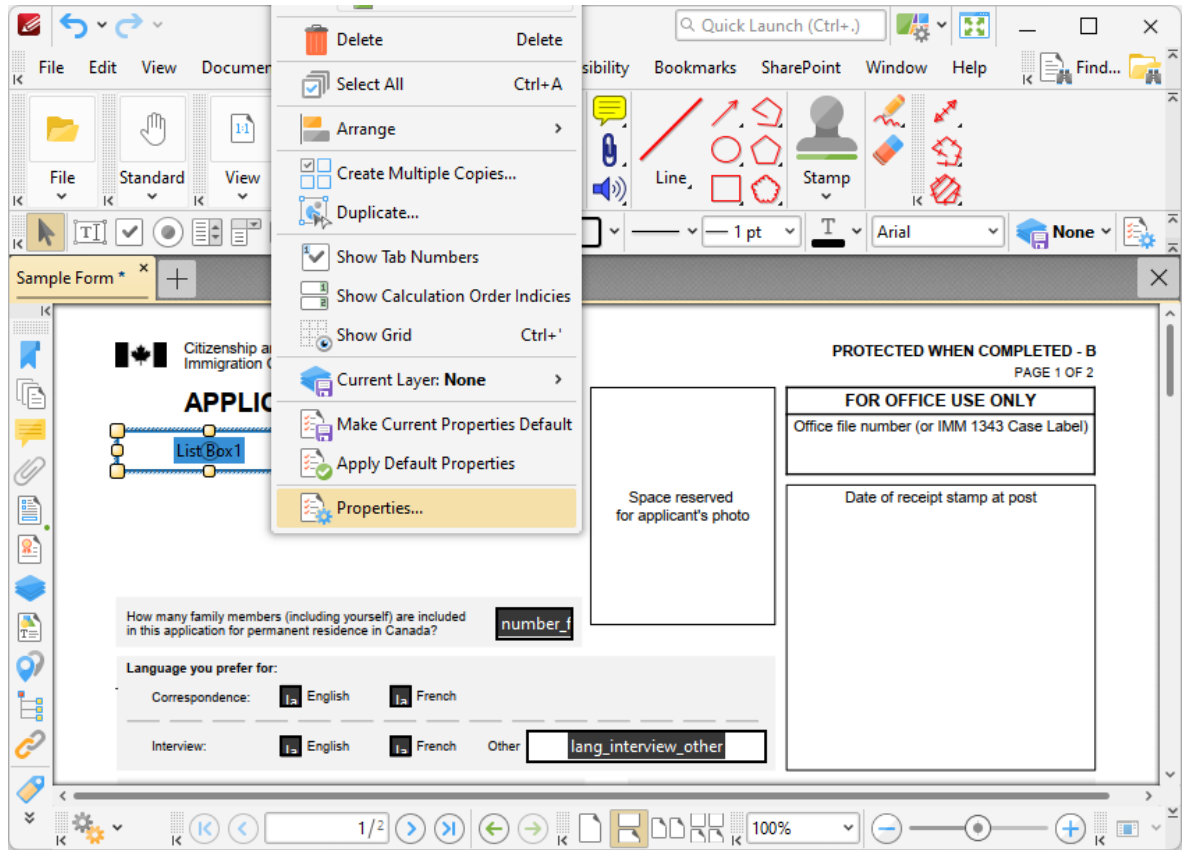
Figure 7. Selected List Box

The **List Box Properties** pane will open.

2. Scroll down to the **List Box Items** property and click **<Empty>:**
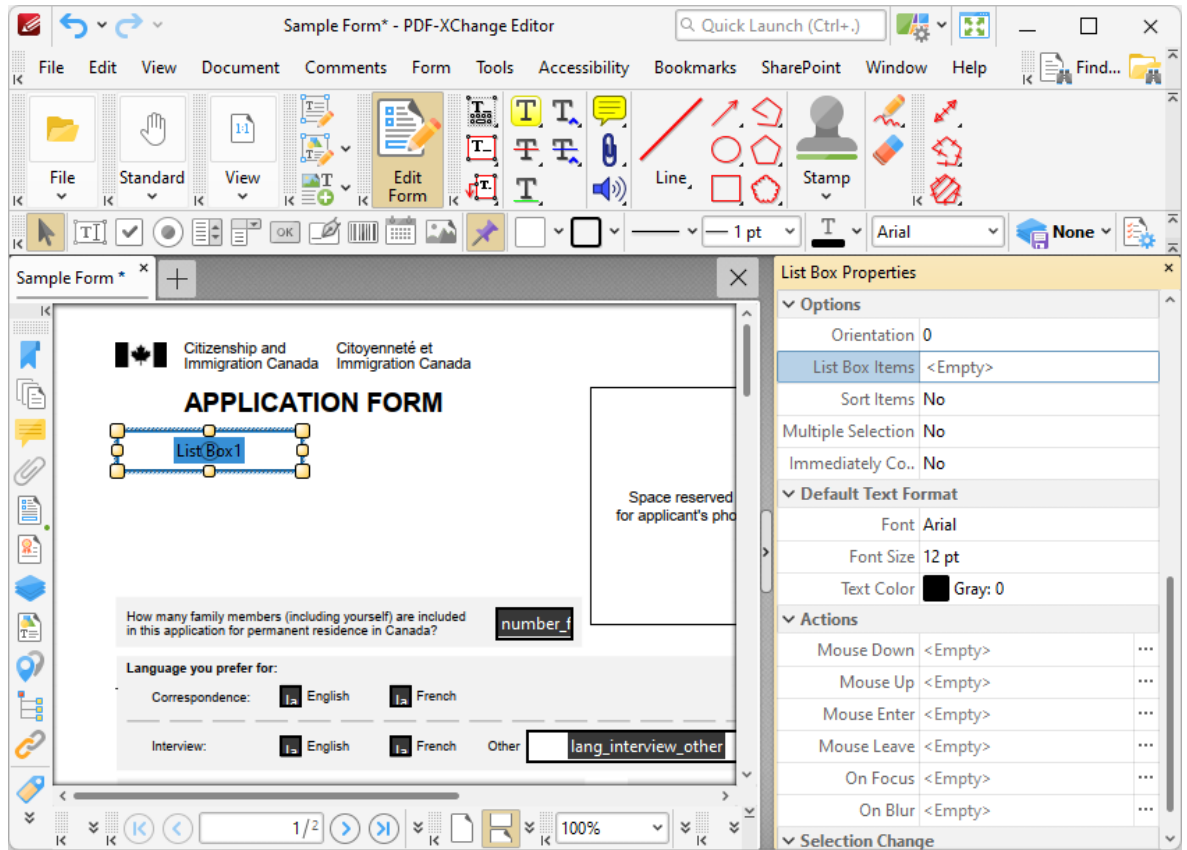
Figure 8. List Box Properties Pane, List Box Items Property

The **List Box** pane will open. This pane is used to add/edit list box items.

3. Click **Add New** to add new entries to the list box:
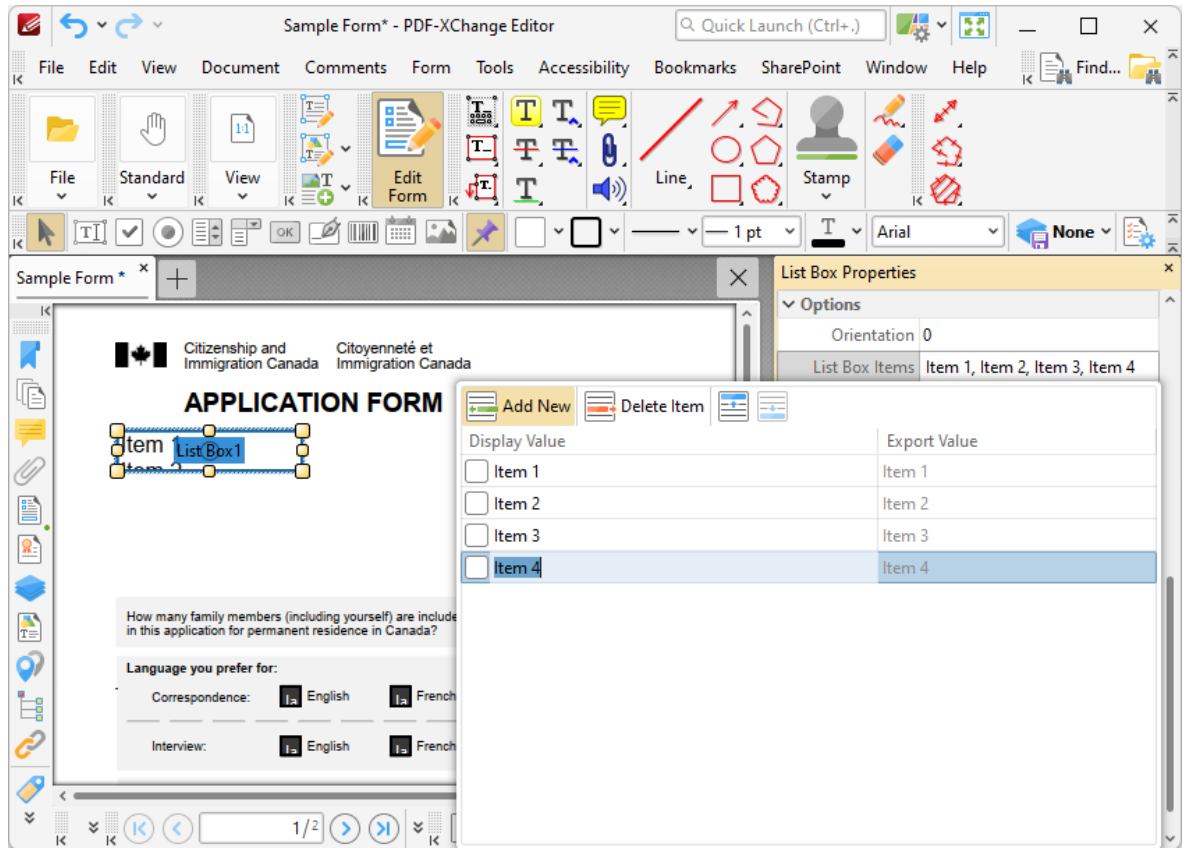
Figure 9. List Box Items Pane

- Click **Delete Item** to delete the selected item from the list box.
- Click the **Up** and **Down** buttons to move selected items up or down in the list. The order of items in the pane represents the order to items in the list box.
- Enter values in the **Export Value** column to determine the value given for exported list box items. Note that values must be first selected in the **List Box Items** pane and then clicked in order to edit the name.
- Click to select **Display Value** names, and then click them again in order to edit the name.
- Select the check box of the item to be used as the default selection in the list box. This item will be selected when the list box is in its default state.

4. Click outside the **List Box Items** pane to complete the process, then use the **Hand Tool** to select list box items:
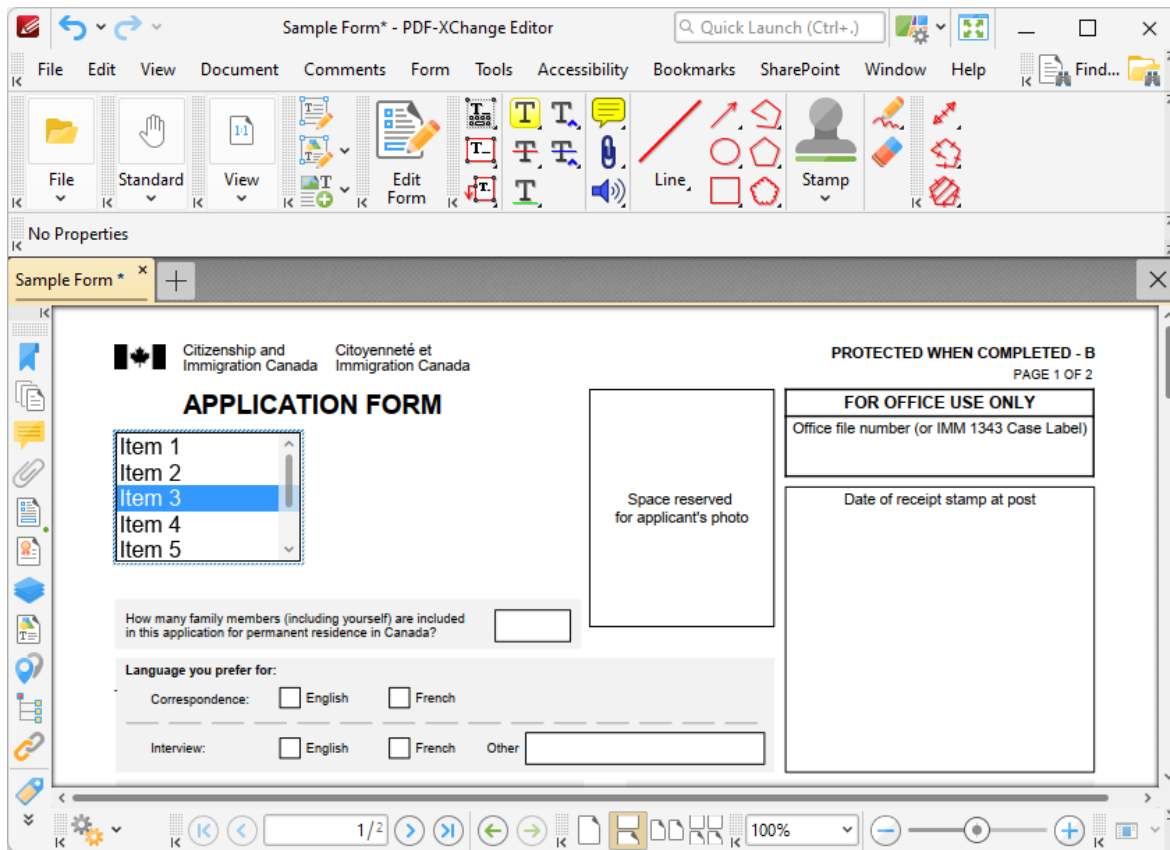
Figure 10. Completed List Box

5.3.1.2.5 Add Dropdown Menus to Documents

Add Dropdown Menus to Documents

Dropdown menus enable users to select one option from a fixed list of options:
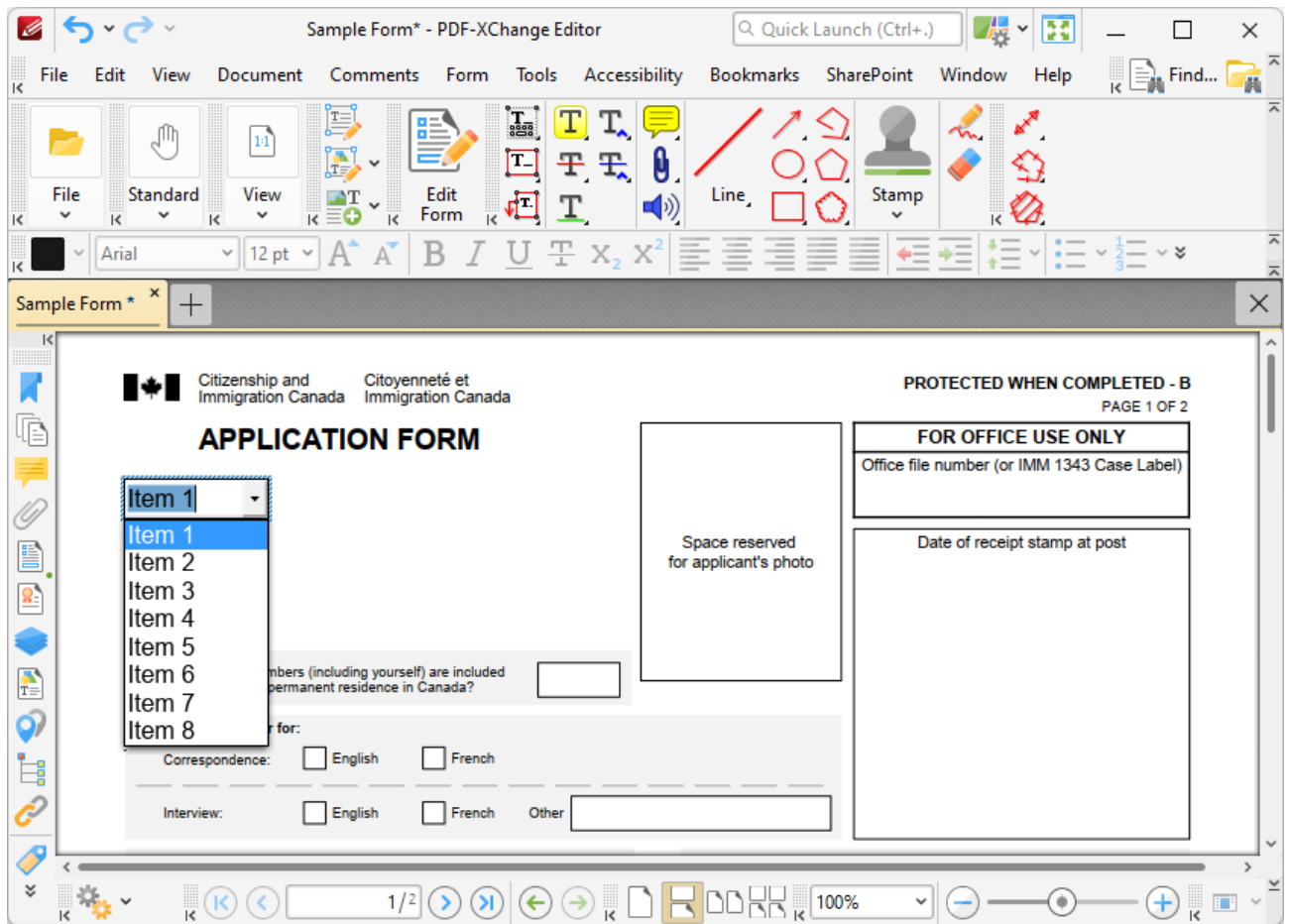
Figure 1. Example Dropdown Menu

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for dropdown menus, as detailed below. Click the dropdowns for further information:

   ▼ **Add Dropdown Menus to Documents**

1. Click **Edit Form,** then click the **Dropdown** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the dropdown menu:
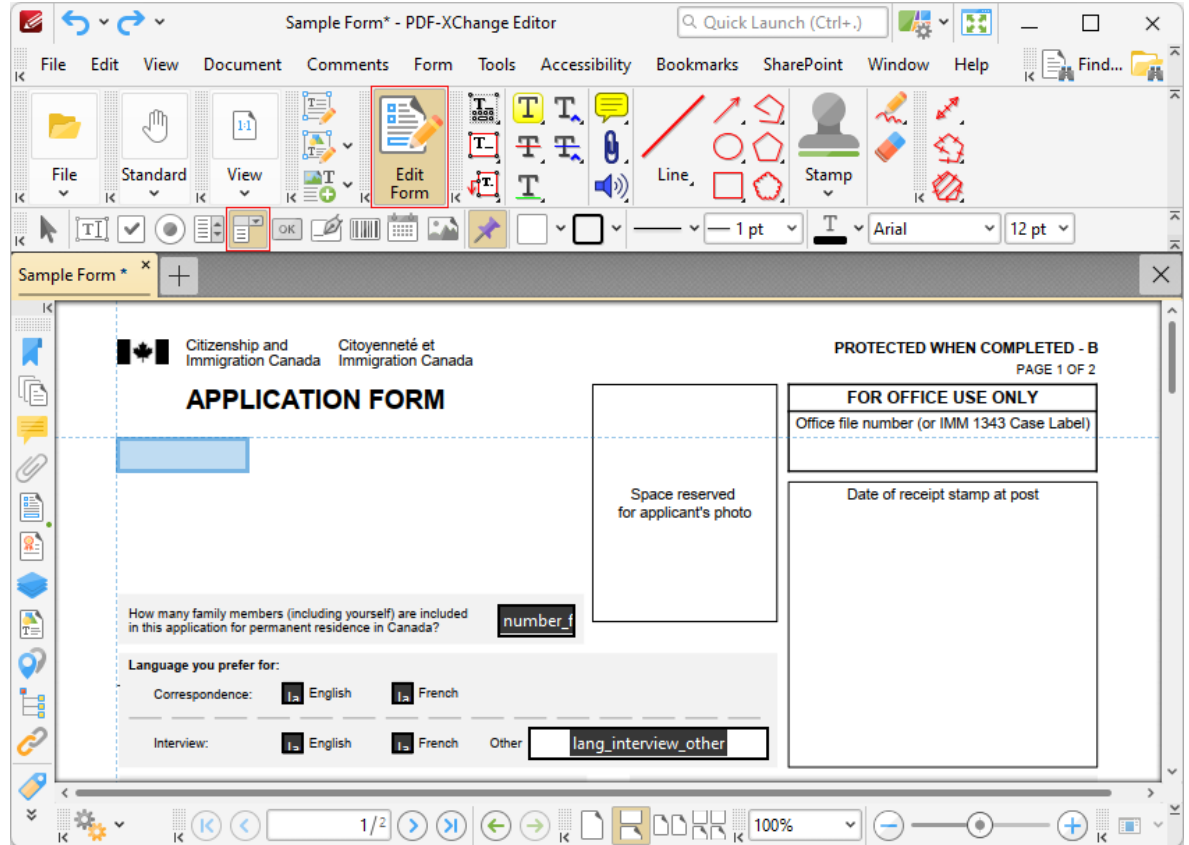
Figure 2. Active Dropdown Tool

2. Move the rectangle to the desired location and then click to add the dropdown menu to the document. (Use the editing aids detailed **here** ⌐610⌐ to assist in the precise placement of dropdown menus). Added dropdown menus appear as detailed below:
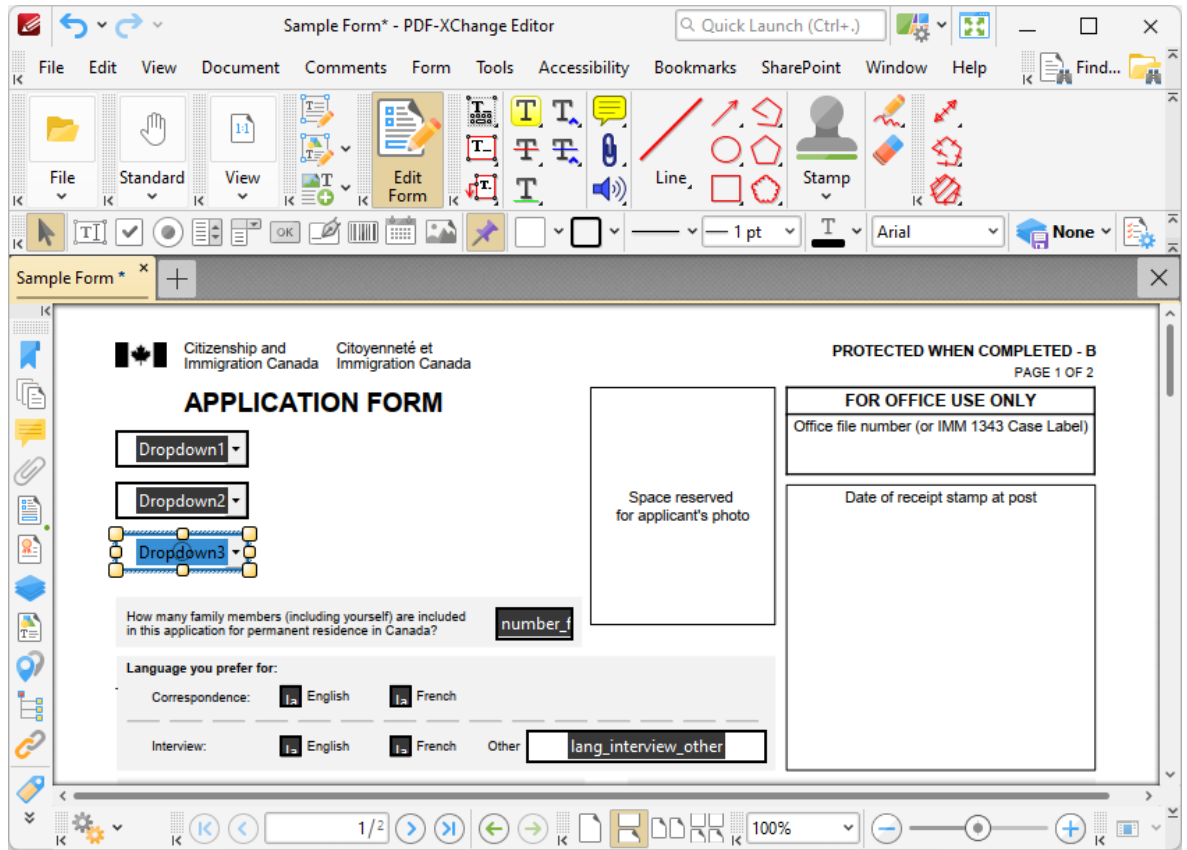
Figure 3. Added Dropdown Menus

- Click and drag the yellow control points to resize dropdown menus.
- Use the options in the **Properties Toolbar** 485 to determine the style and appearance of dropdown menus:
    - **Fill Color** determines the color used to fill dropdown menus.
    - **Stroke Color** determines the border color of dropdown menus.
    - **Border Style** determines the style of dropdown menu borders.
    - **Border Width** determines the width of dropdown menu borders.
    - **Text Color** determines the color of the text in dropdown menus.
    - **Font** determines the font used in dropdown menus.
    - **Properties** launches the **Dropdown Properties** pane, which enables the customization of additional elements of dropdown menus.

▼ **The Dropdown Properties Pane**
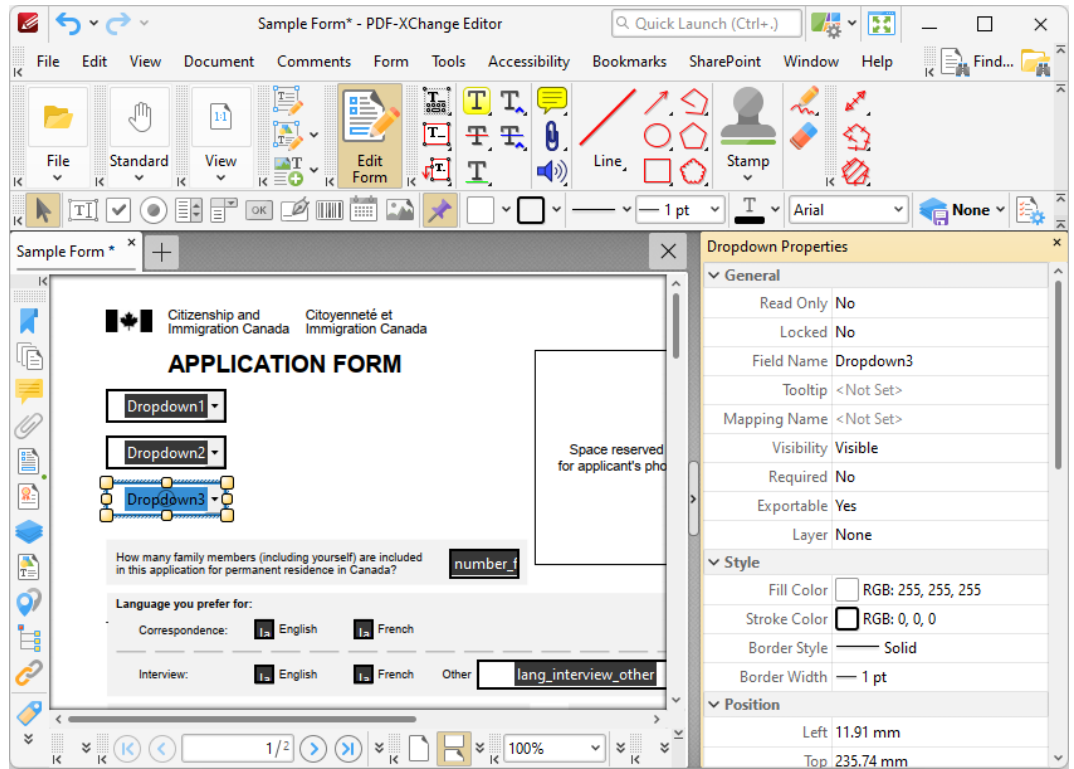
Figure 4. Dropdown Menu Tool, Dropdown Properties Pane

The **Dropdown Properties** pane can be used to determine a range of style and functionality options for dropdown menus. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to dropdown menus, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for dropdown menus:

The **General** properties determine the general parameters of dropdown menus:
- **Read Only** determines whether or not the dropdown menu can be edited.
- **Locked** determines whether or not the dropdown menu can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the dropdown menu. This name is present when the **Edit Form** tool is selected, and when dropdown menus are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the dropdown menu.
- **Mapping Name** determines the mapping name that the dropdown menu uses. This name is used to reference interactive form data when the form is

exported, and does so without affecting the appearance of the name in the original document.
- **Orientation** determines the orientation of the dropdown menu.
- **Visibility** determines the visibility of the dropdown menu.
- **Required** determines whether or not the dropdown menu is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the dropdown menu data can be exported from the form.
- **Layer** determines the optional content layer to which the dropdown menu belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of dropdown menus. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of dropdown menus:
- **Left** determines the distance of the dropdown menu from the left margin.
- **Top** determines the distance of the dropdown menu from the bottom of the page.
- **Width/Height** determine the width/height of the dropdown menu.

The **Default Text Format** properties determine the default properties when text is entered into the dropdown menu:
- **Font** determines the font used to create the dropdown menu entries.
- **Font Size** determine the size of the font used to create the dropdown menu entries.
- **Text Color** determines the color of the tick when dropdown menus are selected.

The **Options** properties determine additional options for dropdown menus:
- **Combo Box Items** determine the options in the dropdown menu. See below for an example on how to add/edit options in the dropdown menu.
- **Sort Items** arranges the listed items numerically and/or alphabetically. Note that numerical sorts are performed before alphabetical sorts in cases where both sorts apply.
- **Allow Edit** enables a text box at the top of dropdown menus that can be used to enter custom values as the value of the dropdown menu:
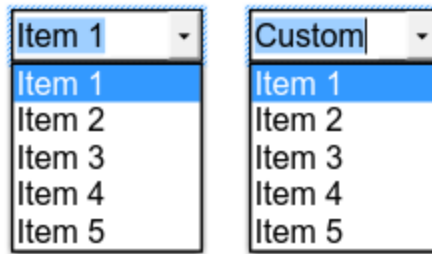
Figure 5. Standard Dropdown (left) and Allow Edit Dropdown (right)

Please note that this property can also be used to give dropdown menus a title that is different from the entries that it contains. An example of this process is detailed below.

- **Check Spelling** is available only when the **Allow Edit** property is enabled, and auto-checks the spelling of custom values entered into dropdown menus.
- **Immediately Commit** saves selected values as soon as they are selected. If this option is not enabled then the value is saved only when the user tabs out of the current field/clicks a different form field.

The **Actions** properties determine the action taken when users interact with the dropdown menu:

- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the dropdown menu.
- **Mouse Leave** initiates an action when the pointer moves out of the dropdown menu.
- **On Focus** initiates an action when the dropdown menu is selected.
- **On Blur** initiates an action when the dropdown menu is deselected.
- Click the ellipsis icon on the right of actions to add/edit dropdown menu actions:
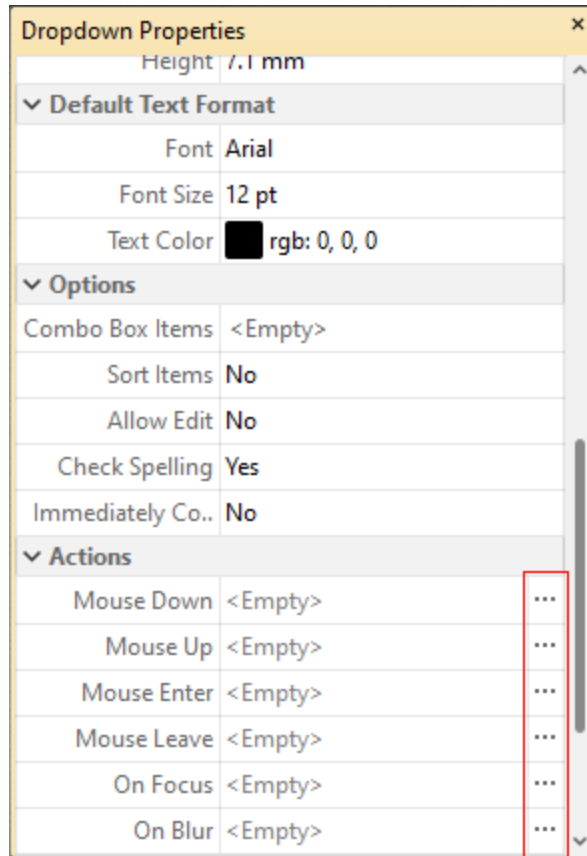
Figure 6. Dropdown Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** [991]

The **Format Value** properties determine the type of information permitted to be entered in the dropdown menu and the format in which it should be entered. This setting applies to both predefined items in the dropdown list, and custom entries entered when the **Allow Edit** property is enabled:

- **Category** determines the category of the dropdown menu. Each category has different options, as detailed below:
  - **None** is the default setting. Dropdown menu do not have a **Format Value** category when this option is selected.
  - **Number** sets the dropdown menu input to numerical values. The following options are available for this setting:
    - **Decimal Places** determines the number of decimal places displayed.
    - **Separator Style** determines the separators used for numbers.
    - **Currency Symbol** determines the currency symbol used in the dropdown menu.
    - **Symbol Location** determines 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** determines how numbers with negative values are displayed.
- **Percentage** sets the dropdown menu input to percentage values. The following options are available for this setting:
  - **Decimal Places** determines the number of decimal places permitted.
  - **Separator Style** determines the separator used for numbers.
- **Date** sets the dropdown menu input to date values and adds a dropdown calendar to the dropdown menu. Use the **Date Format** parameter to determine the format of dates.
- **Time** sets the dropdown menu input to time values (hours and minutes). Use the **Time Format** parameters to determine the format of time values.
- **Special** sets the dropdown menu input values to one of the special options. Use the **Special Format** parameter to determine the format. The options are:
  - **ZIP Code**
  - **ZIP Code +4,** which is used for nine-digit postal codes.
  - **Phone Number**
  - **Social Security Number**
- **Custom Action** adds custom JavaScript actions to dropdown menu. There are two options:
  - **Format Action** is used to enable custom JavaScript for formats. Click the ellipsis icon to add/view JavaScript.
  - **Keystroke Action** is used to enable custom JavaScript for keystrokes. Click the ellipsis icon to add/view JavaScript.
  - If the options above are used then the **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**

Figure 7. Edit Action: "Run a JavaScript" Dialog Box

The **Value Validation** properties determine the validation of values entered into the dropdown menu:

- **Validation** determines how values are validated:
    - **Value in Range** sets the range within which values entered into the dropdown menu must fall:
        - **From** specifies the minimum value.
        - **To** specifies the maximum value.
    - **Custom** enables the use of custom JavaScript in order to validate values entered in the dropdown menu. Click the ellipsis icon to add/view custom JavaScript, as detailed in *(figure 7).*

The **Value Calculation** properties determine the value of dropdown menu from other dropdown menus:

- **None** specifies that calculations are not performed.
- **Sum** uses the sum of specified fields.
- **Product** uses the product of specified fields.
- **Average** uses the average of specified fields.
- **Minimum** uses the minimum value of all the specified fields.
- **Maximum** uses the maximum value of all specified fields.
- Please note that when the **Sum, Product, Average, Minimum** and **Maximum** properties are used, the additional entry **"Fields"**will appear beneath the **Calculation** property. Use this entry to specify the fields used in these calculations.

- **Simplified Notation** enables the insertion of a custom calculation to be performed on fields. Use the **Simple Notation** box to determine the calculation. Use the document field names and standard mathematical notation (+, -, *, /) to specify the calculation. If there are spaces in form field names then they must be entered in quotation marks. For example: **Field1 + Field 2 / "Division Field" * 64.**
- **Custom Action** enables the use of custom JavaScript in order to perform calculations and determine the order in which calculations are performed. Click the ellipsis icon to add custom JavaScript, as detailed in *(figure 7).*

▼ Adding and Editing Dropdown Menu Items

Follow the steps below to add/edit dropdown menu items:

1. Click **Edit Form,** then right-click the dropdown menu and click **Properties:**
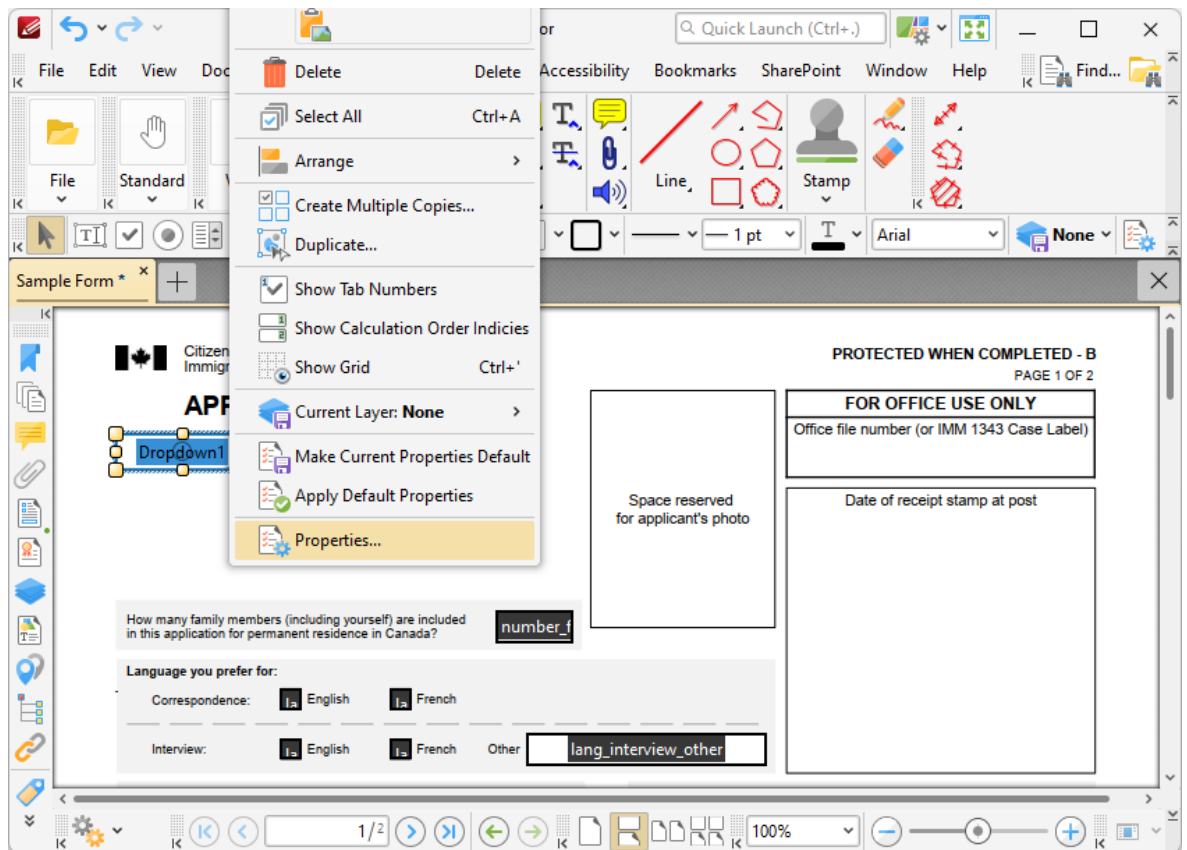
Figure 8. Selected Dropdown Menu

The **Dropdown Properties** pane will open.

2. Move to the **Combo Box Items** property and click **<Empty>:**
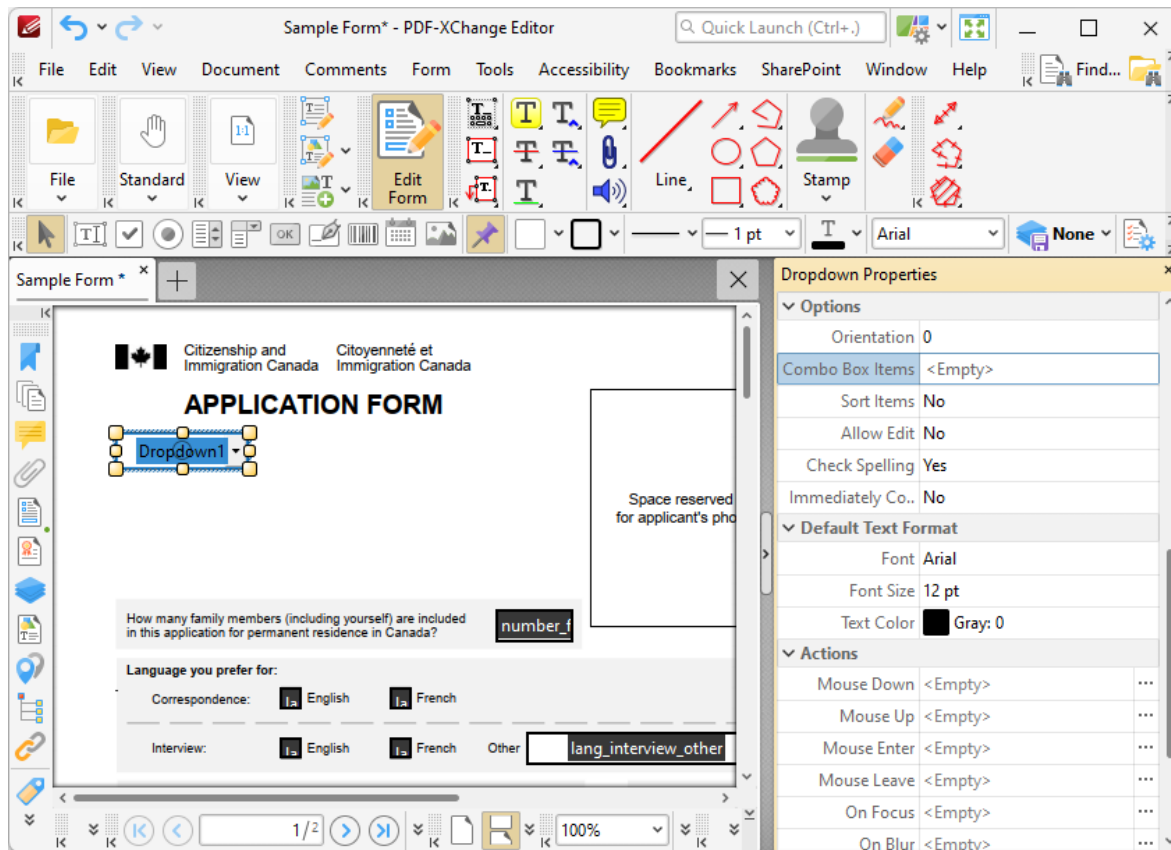
Figure 9. Dropdown Properties Pane, Combo Box Items

The **Dropdown Menu** pane will open. This pane is used to add/edit dropdown menu items:
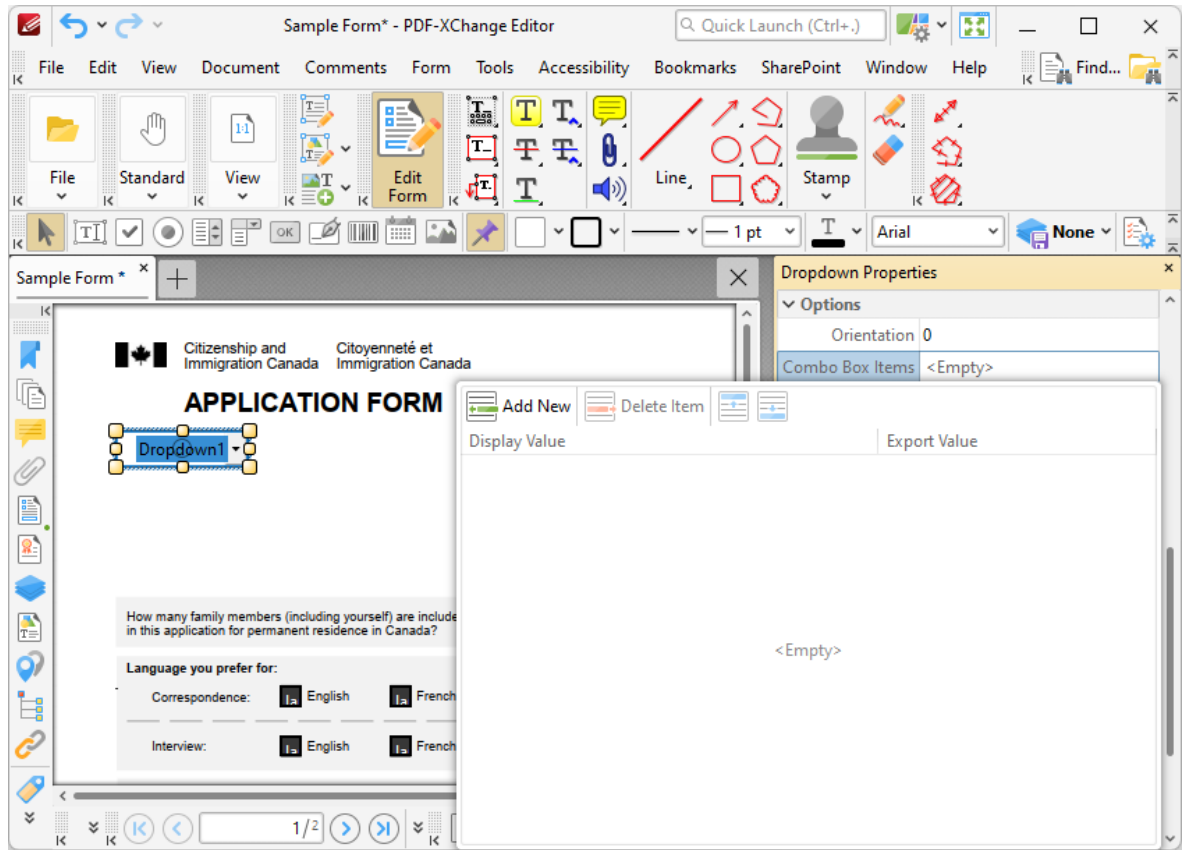
Figure 10. Dropdown Menu Pane

3. Click **Add New** to add new entries to the dropdown menu:
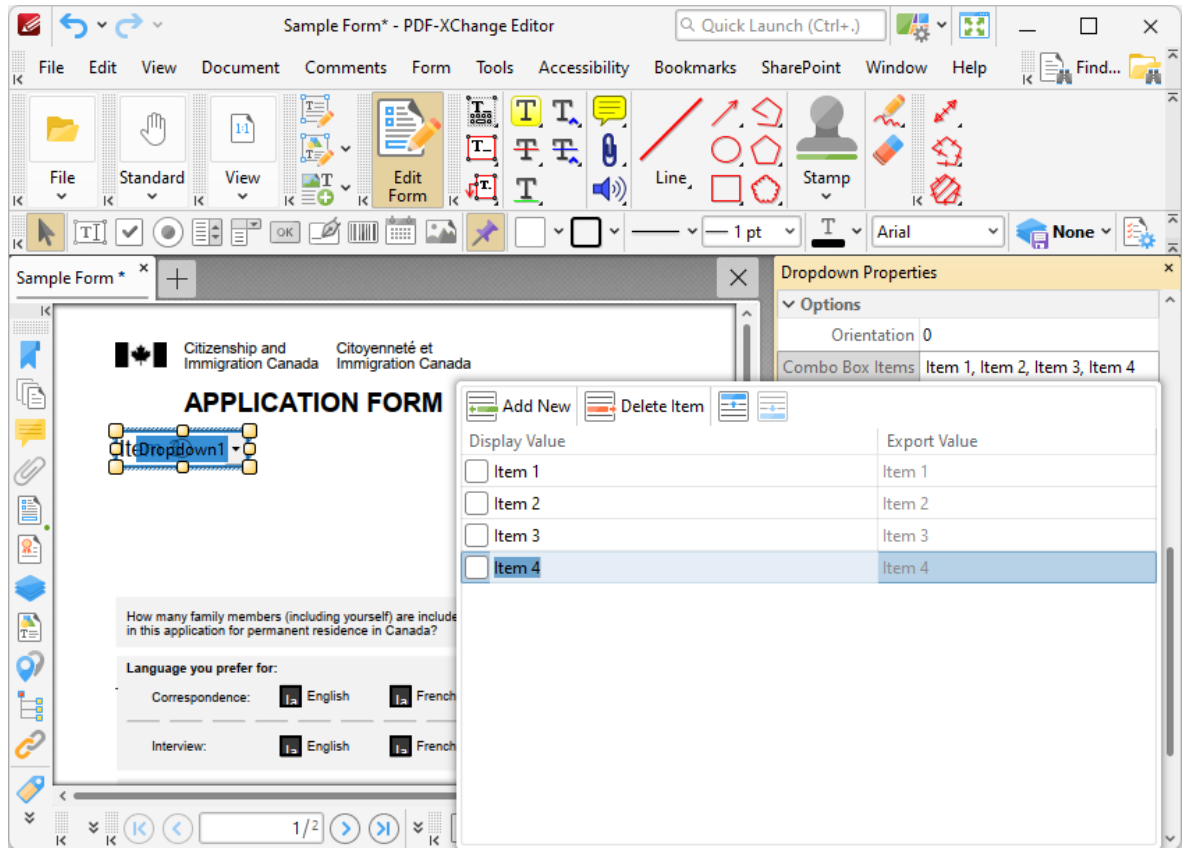
Figure 11. Dropdown Menu Items Pane

- Click **Delete Item** to delete the selected item from the dropdown menu.
- Click the **Up** and **Down** buttons to move selected items up or down in the list. The order of items in the pane represents the order to items in the dropdown menu.
- Enter values in the **Export Value** column to determine the value given for exported dropdown menu items. Note that values must be first selected in the **Dropdown Menu Items** pane and then clicked in order to edit the name.
- Click to select **Display Value** names, and then click them again in order to edit the name.
- Select the check box of the item to be used as the default selection in the dropdown menu. This item will be selected when the dropdown menu is in its default state.

4. Click outside the **Dropdown Menu Items** pane to complete the process:
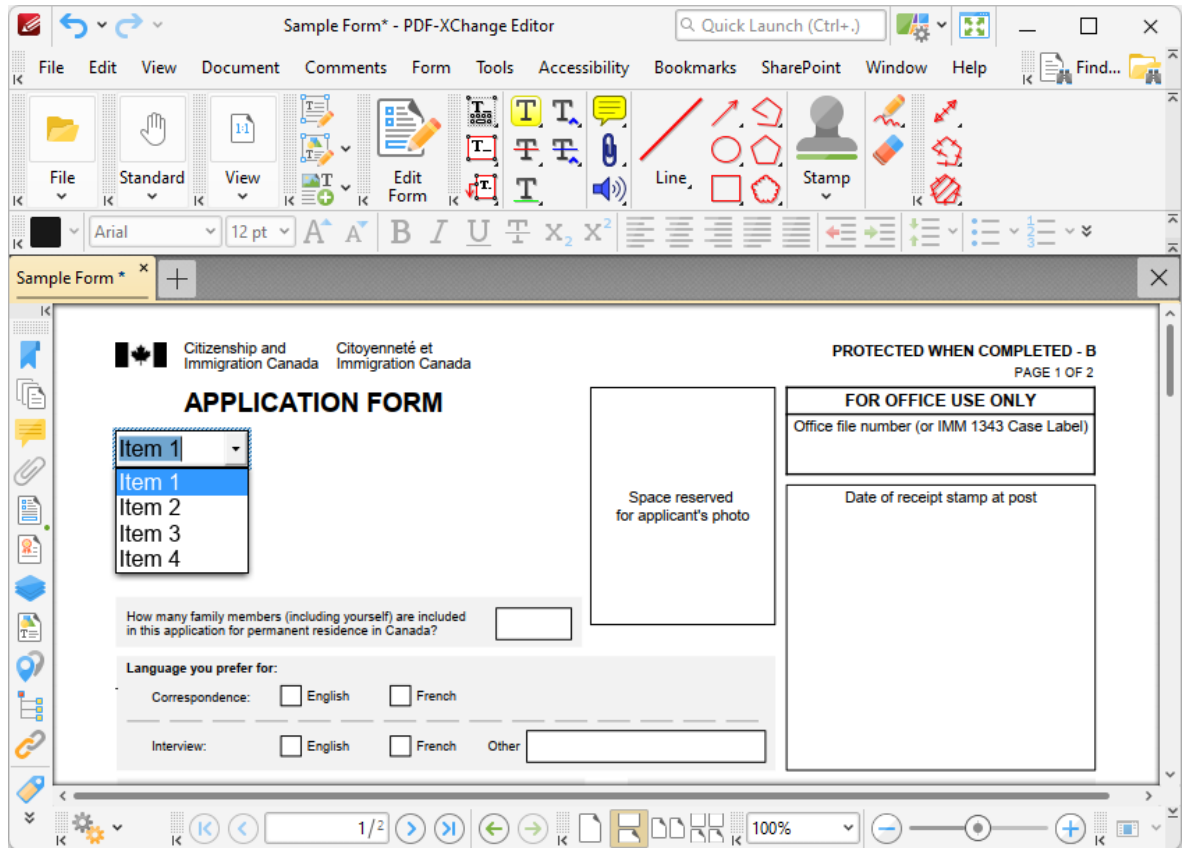
Figure 12. Completed Dropdown Menu

▼ **Value Validation Example**

The following example details a simple value validation of values entered into the dropdown **'Dropdown1':**
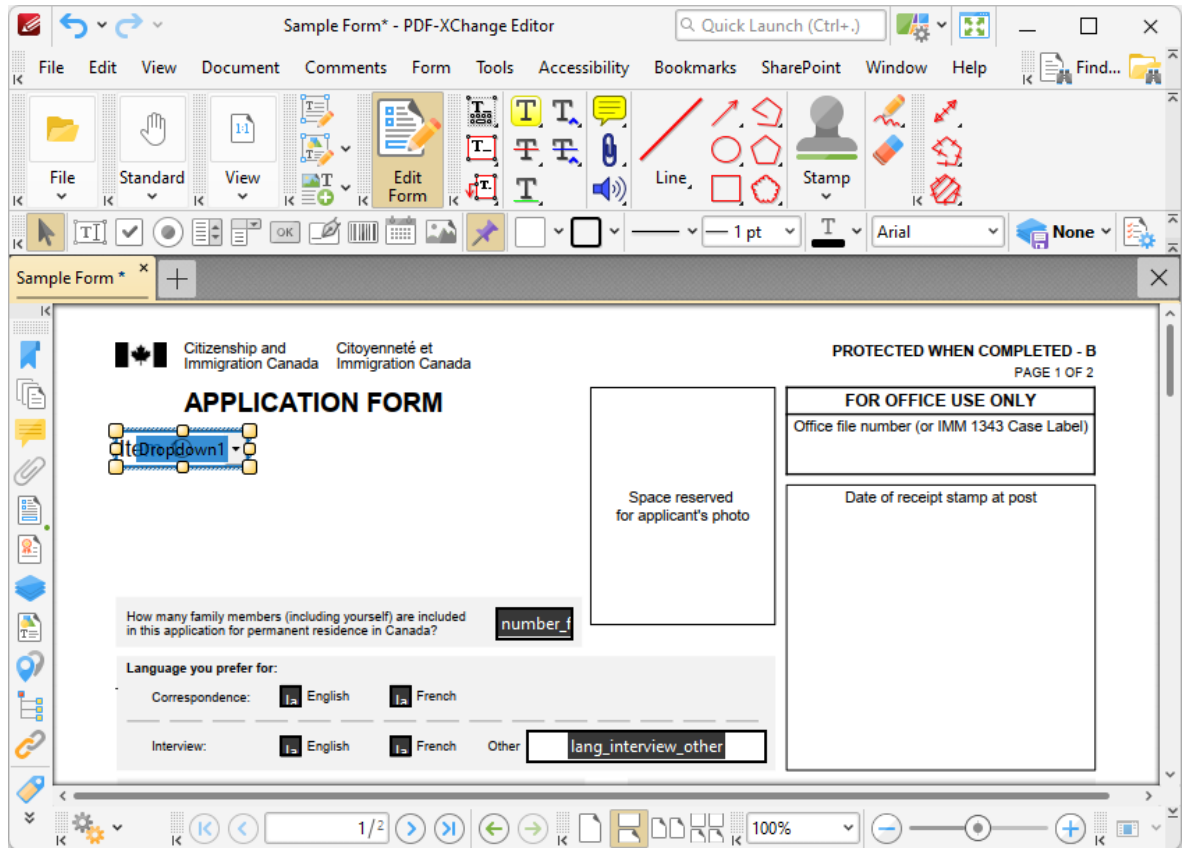
Figure 13. Value Validation Example, Dropdown Menu

This example will detail how to validate that values entered into **'Dropdown1'** fall in the range 0-100:

1. Click **Edit Form,** then select **'Dropdown1'** and click **Properties** in the **Properties Toolbar.** The **Dropdown Properties** pane will open:
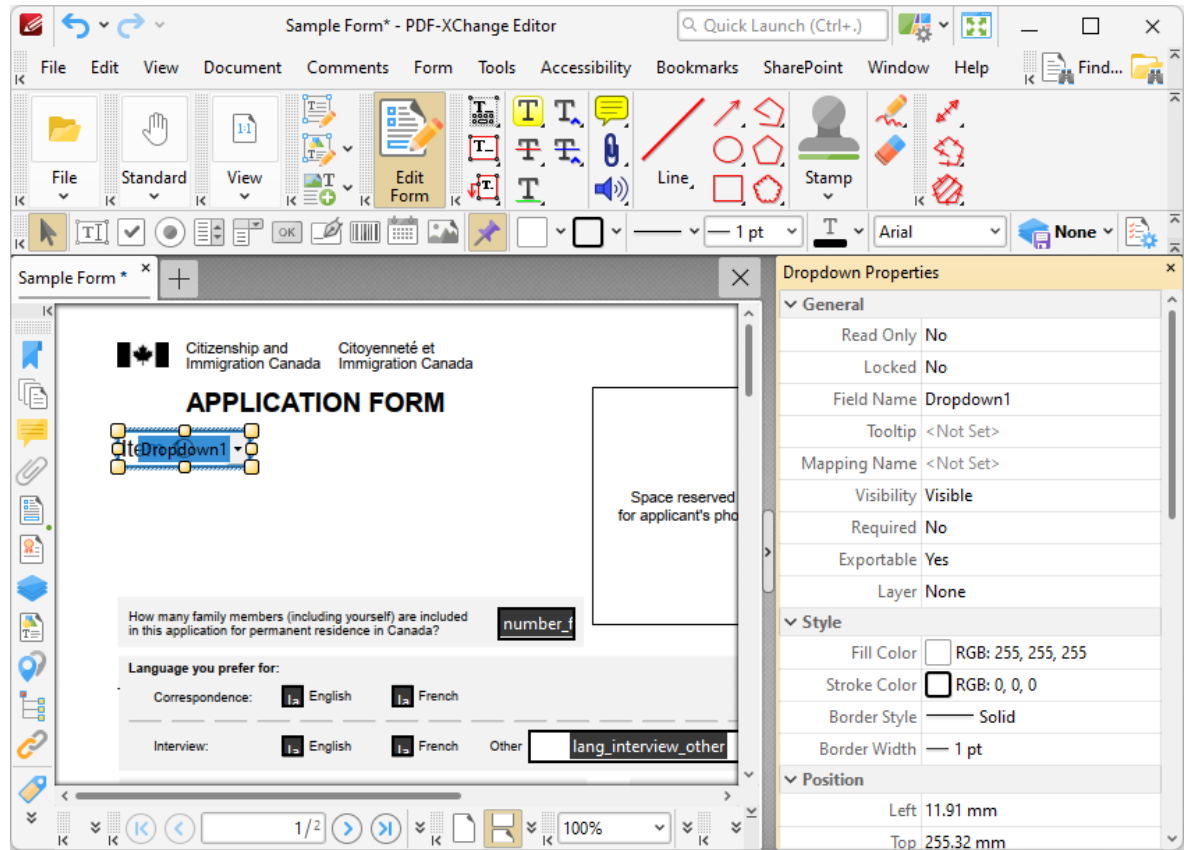
Figure 14. Value Validation Example, Dropdown Properties Pane

2. Scroll down the **Dropdown Properties** pane to the **Format Value** tab, then click the **Category** property and select **Number:**
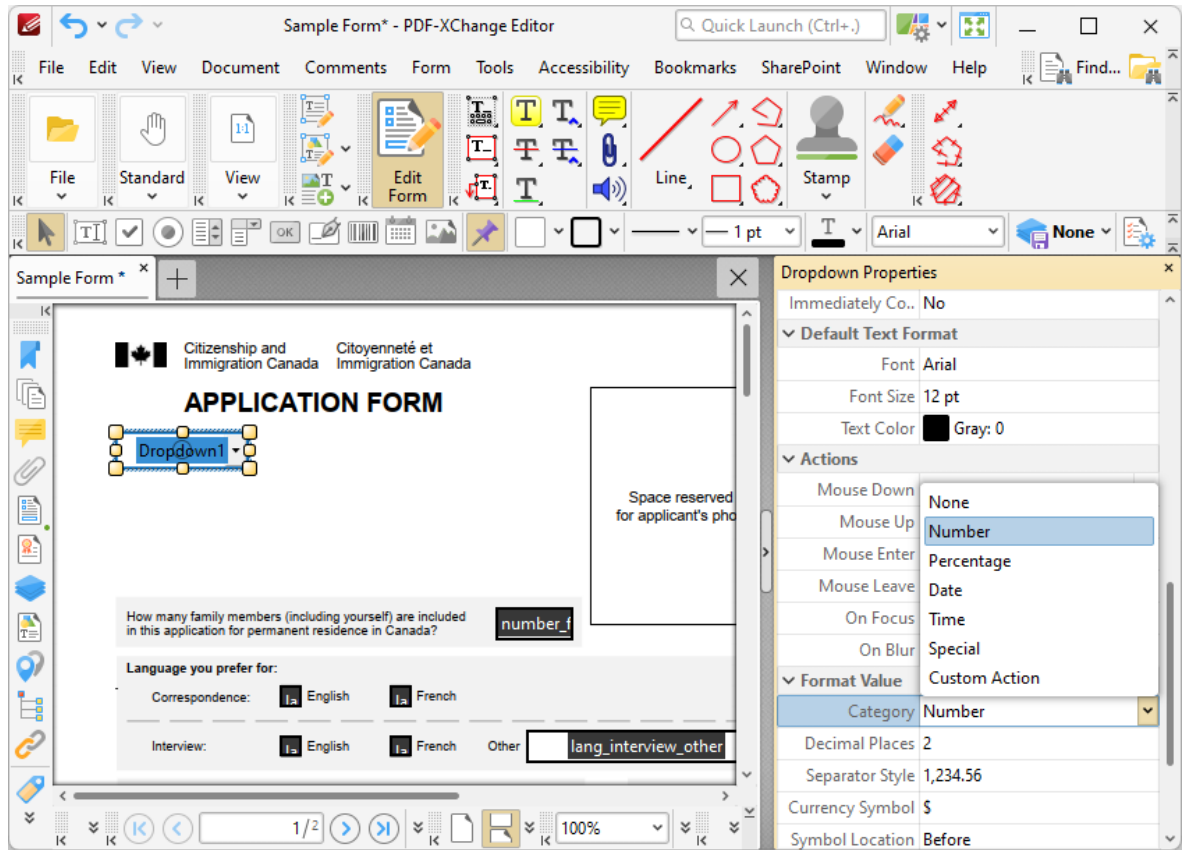
Figure 15. Value Validation Example, Category Option

3. Scroll down the **Dropdown Properties** pane to the **Value Validation** tab, then click the **Validation** option and select **Value in Range:**
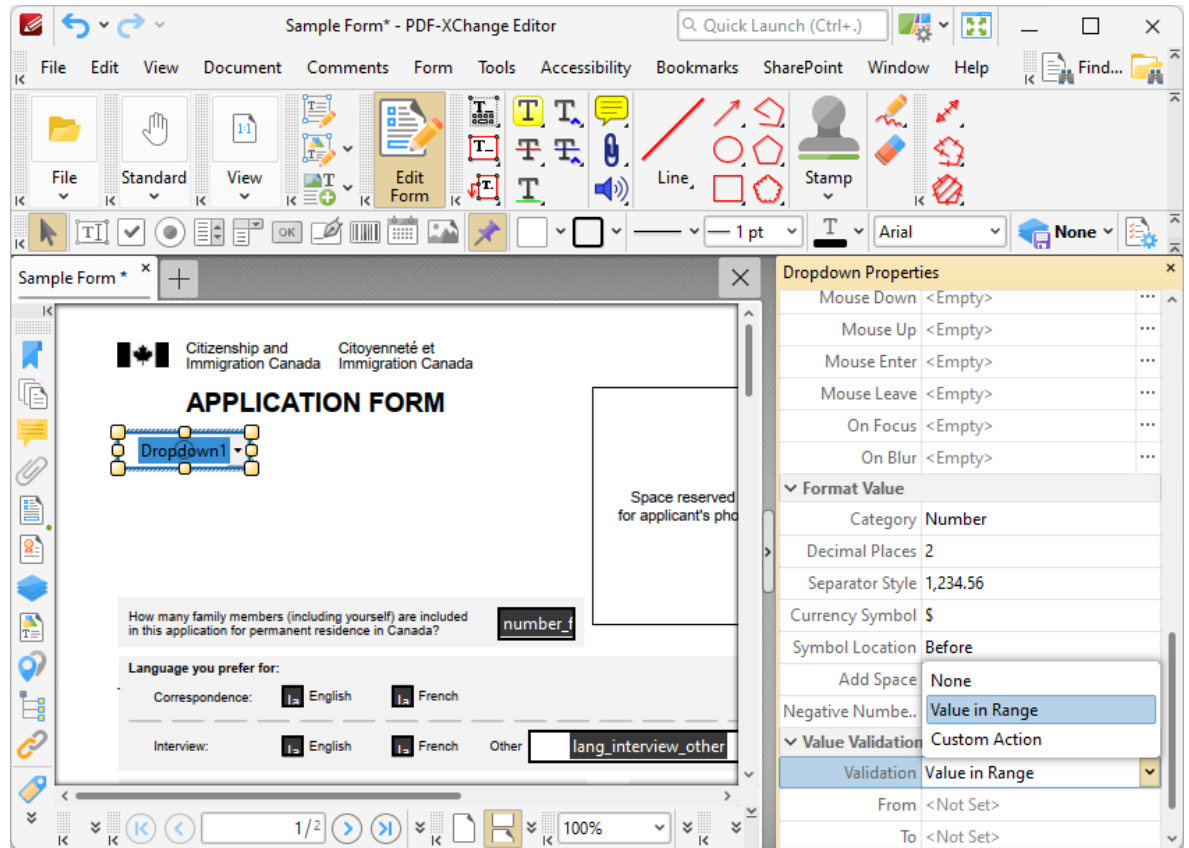
Figure 16. Value Validation Example, Validation Option

Note that the **From** and **To** options will appear beneath the **Validation** property when **Value in Range** is selected.

    3. Enter '0' in the **From** option and '100' in the **To** option:
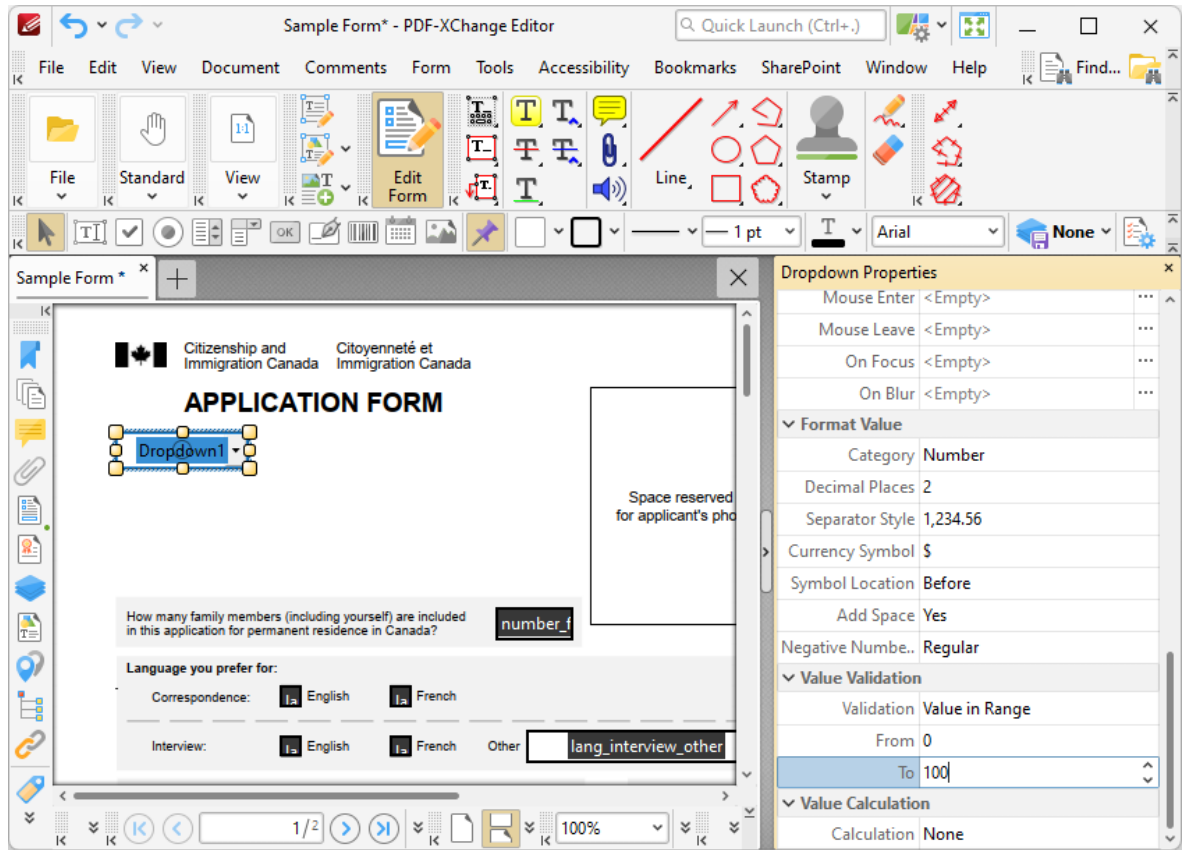
Figure 17. Value Validation Example, From/To Option

All values subsequently entered into '**Dropdown1**' must fall into the range 0-100. Values outside of the specified range will not be permitted, and if they are entered then an error message will appear.

▼ **Edit the Display Name of Dropdown Menus**

The default settings of dropdown menus use a list item as the display name. The process below details how to create a different display name for dropdown menus:

The default settings were used to create the dropdown menu below, and the display name is '**Item 1**':
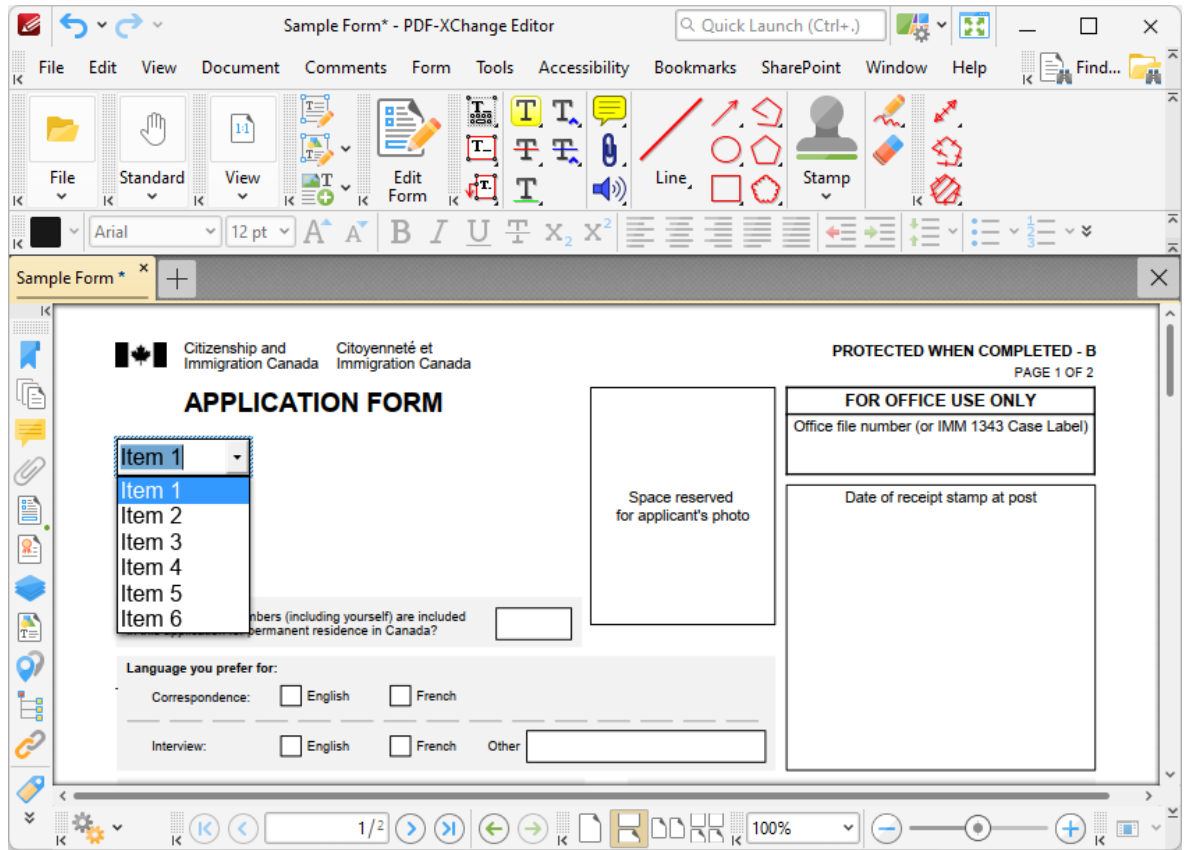
Figure 18. Default Dropdown Menu

1. Click **Edit Form,** then right-click the dropdown menu and click **Properties.** The **Dropdown Properties** pane will open:
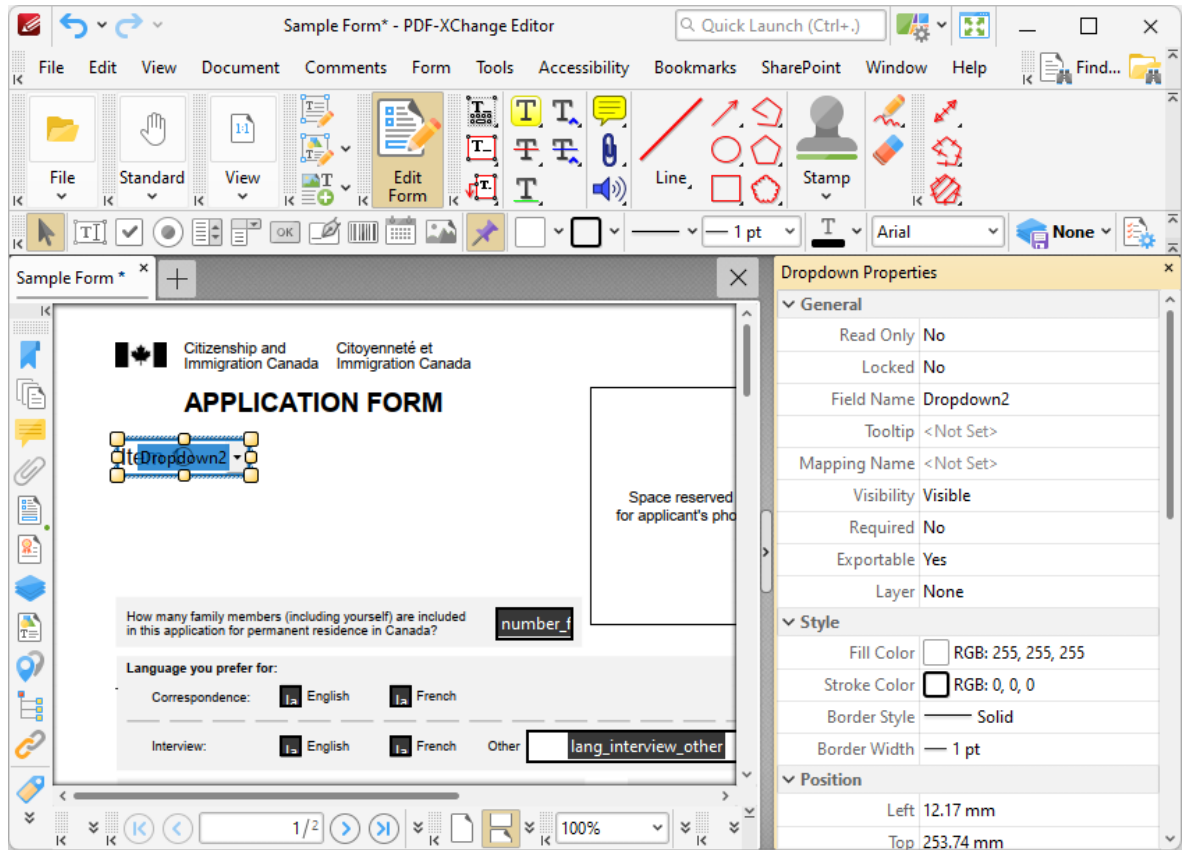
Figure 19. Dropdown Menu Tool, Dropdown Properties Pane

2. Scroll down the **Dropdown Properties** pane to the **Allow Edit** property and change the setting to **Yes:**
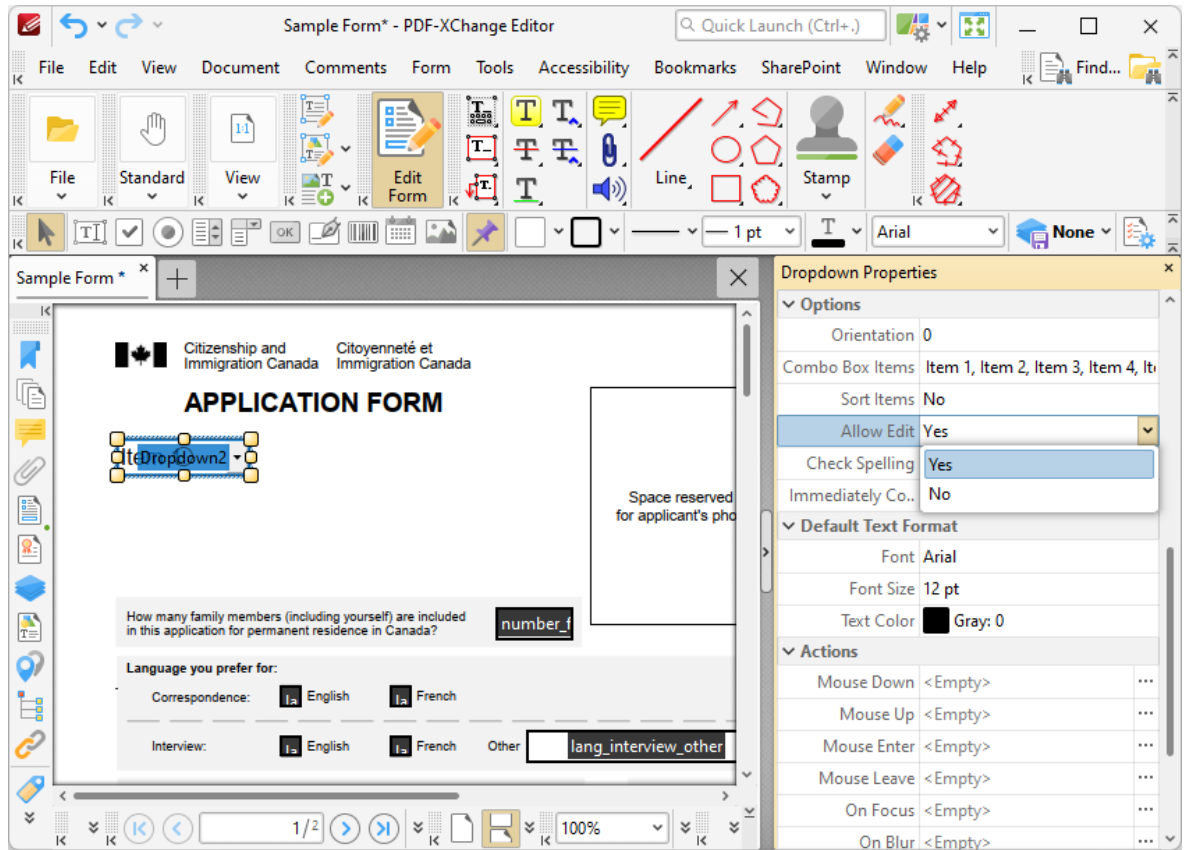
Figure 20. Dropdown Menu Tool, Allow Edit Property

3. Click the **Standard Toolbar,** select the **Hand Tool** then click the dropdown menu and enter the desired display name. This example will use **'Select...':**
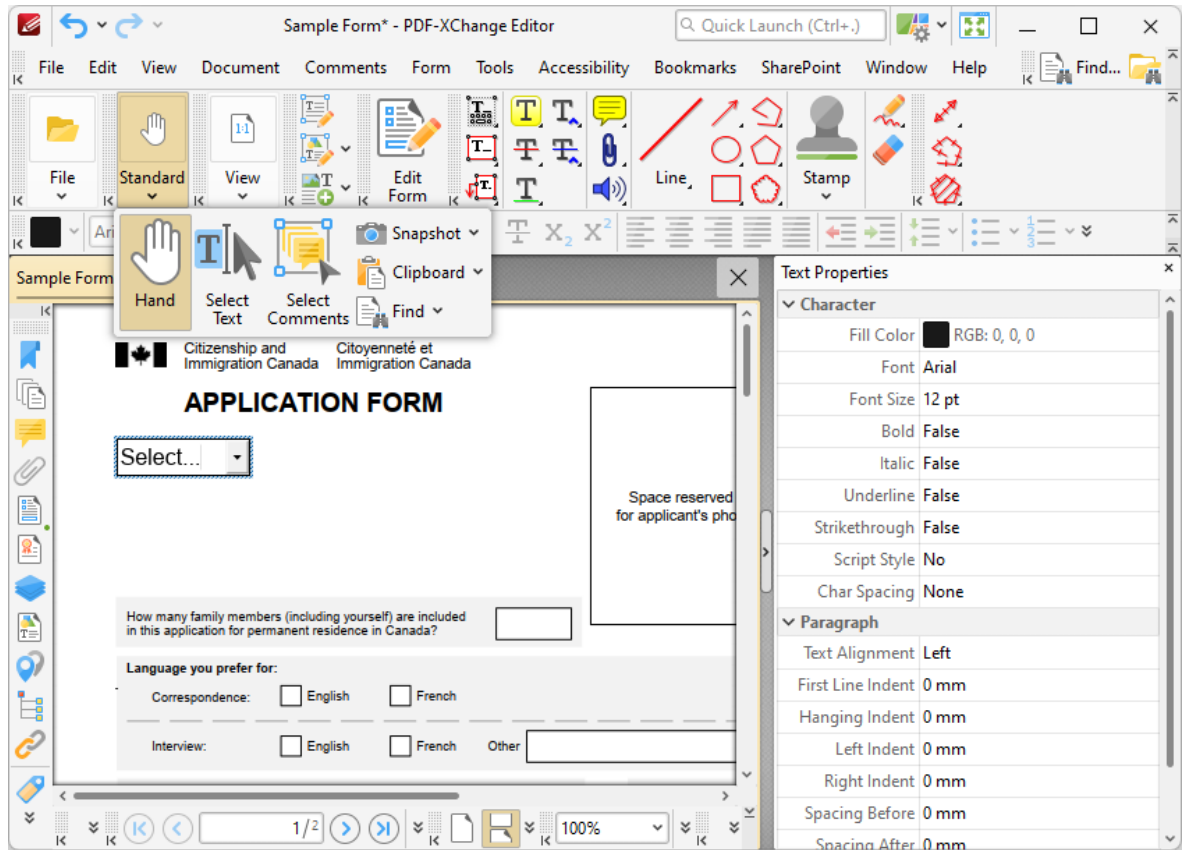
Figure 21. New Dropdown Menu Display Name

4. Click **Edit Form,** then right-click the dropdown menu and click **Properties.** The **Dropdown Properties** pane will open:
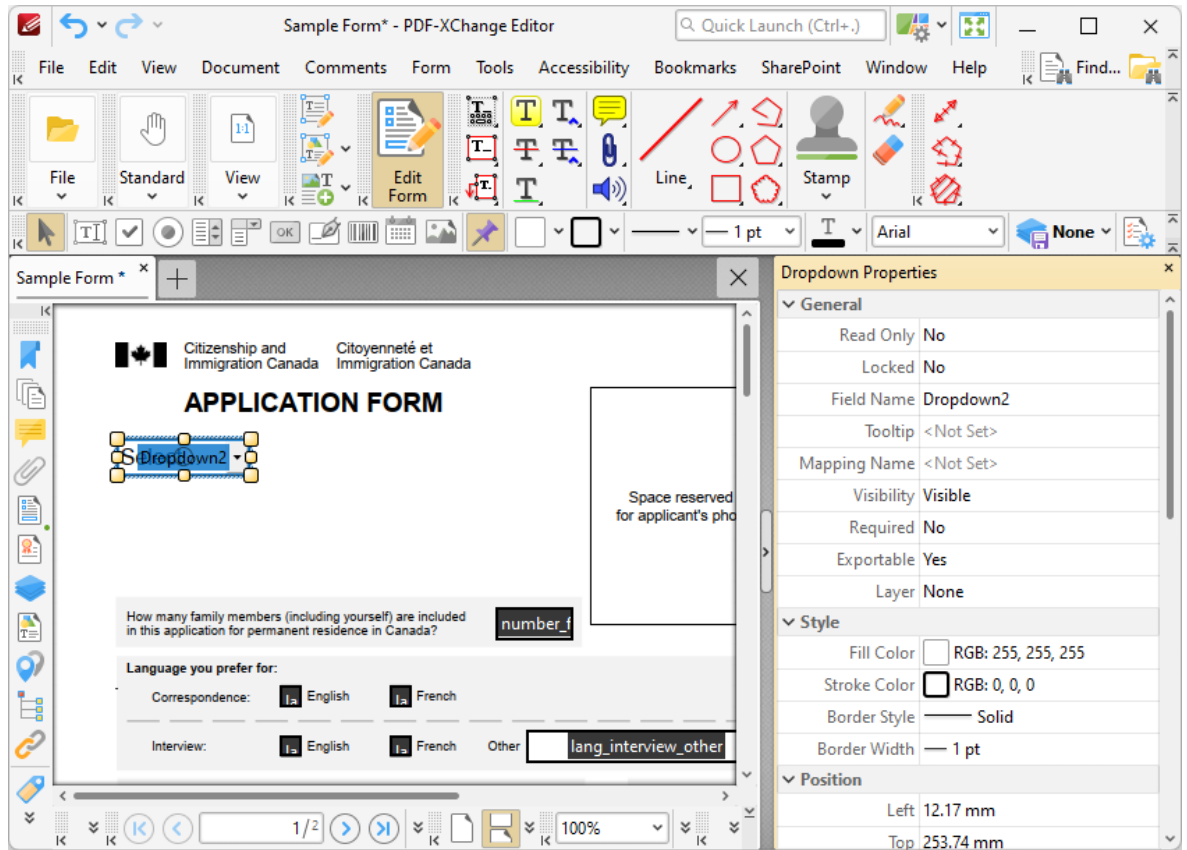
Figure 22. Dropdown Menu Tool, Dropdown Properties Pane

5. Scroll down the **Dropdown Properties** pane to the **Allow Edit** property and change the setting to **No:**
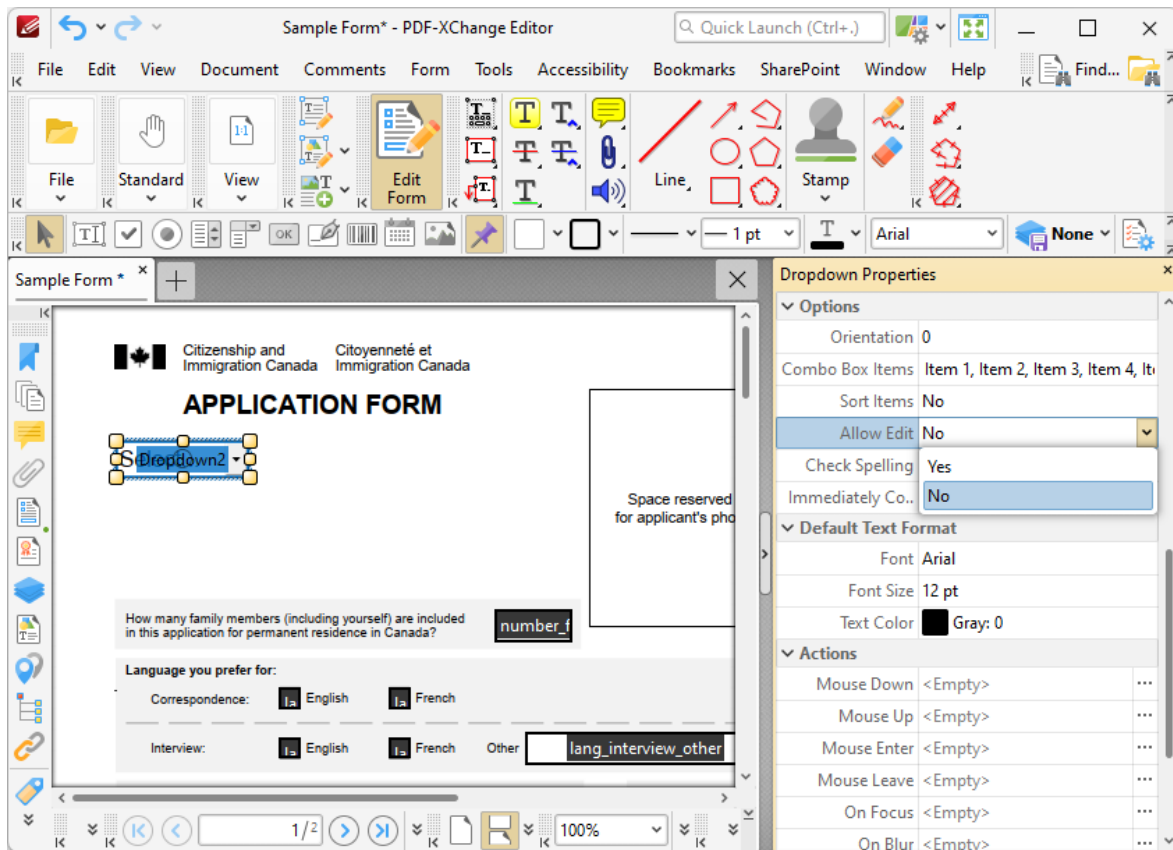
Figure 23. Dropdown Properties Pane, Allow Edit Property

The dropdown menu will display as detailed below:
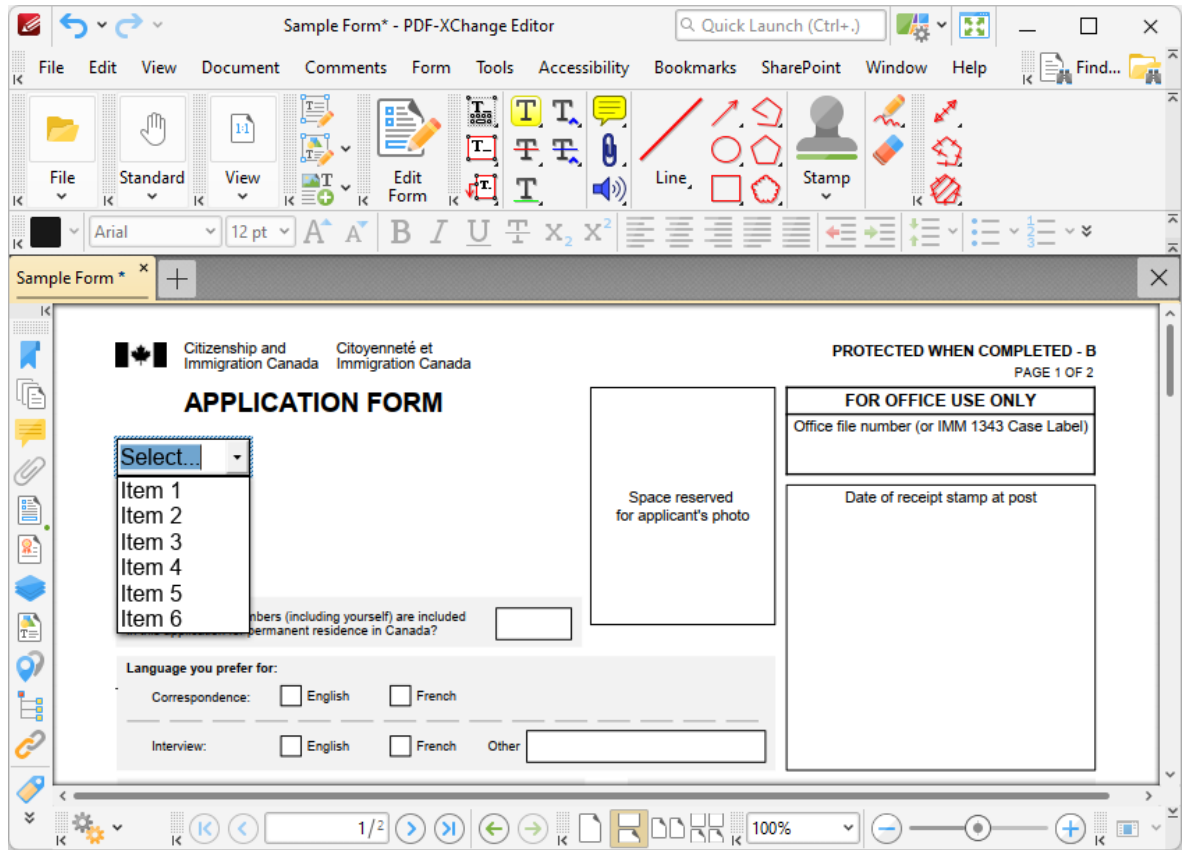
Figure 24. Dropdown Menu, New Display Name

5.3.1.2.6 Add Buttons to Documents

Add Buttons to Documents

Buttons enhance the dynamics of documents and enable users to trigger predefined events:
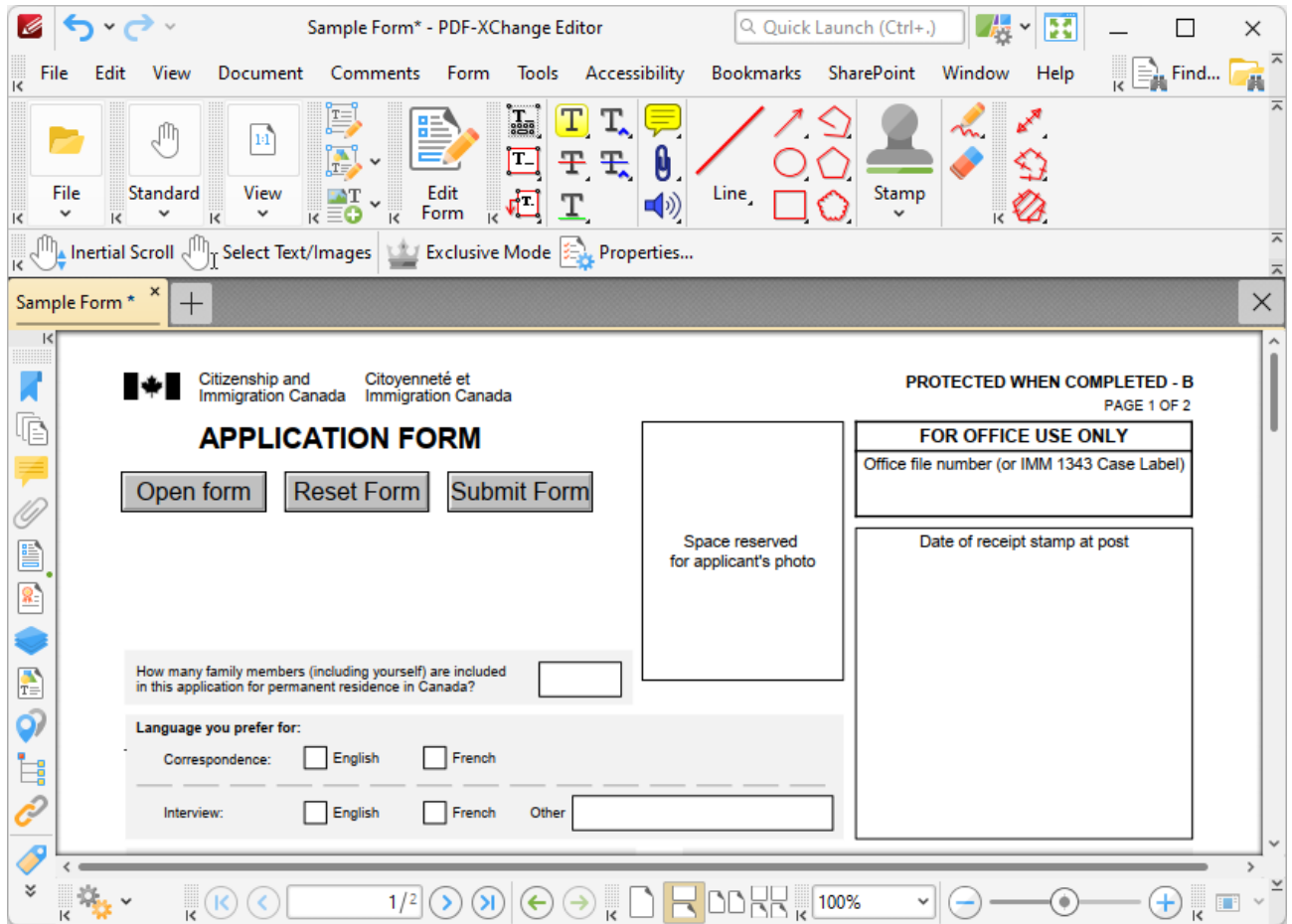
Figure 1. Example Buttons

The functionality of **PDF-XChange Editor** enables a wide range of customization for buttons, as detailed below. Click the dropdowns for further information:

▼ **Add Buttons to Documents**

1. Click **Edit Form,** then click the **Button** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the button:
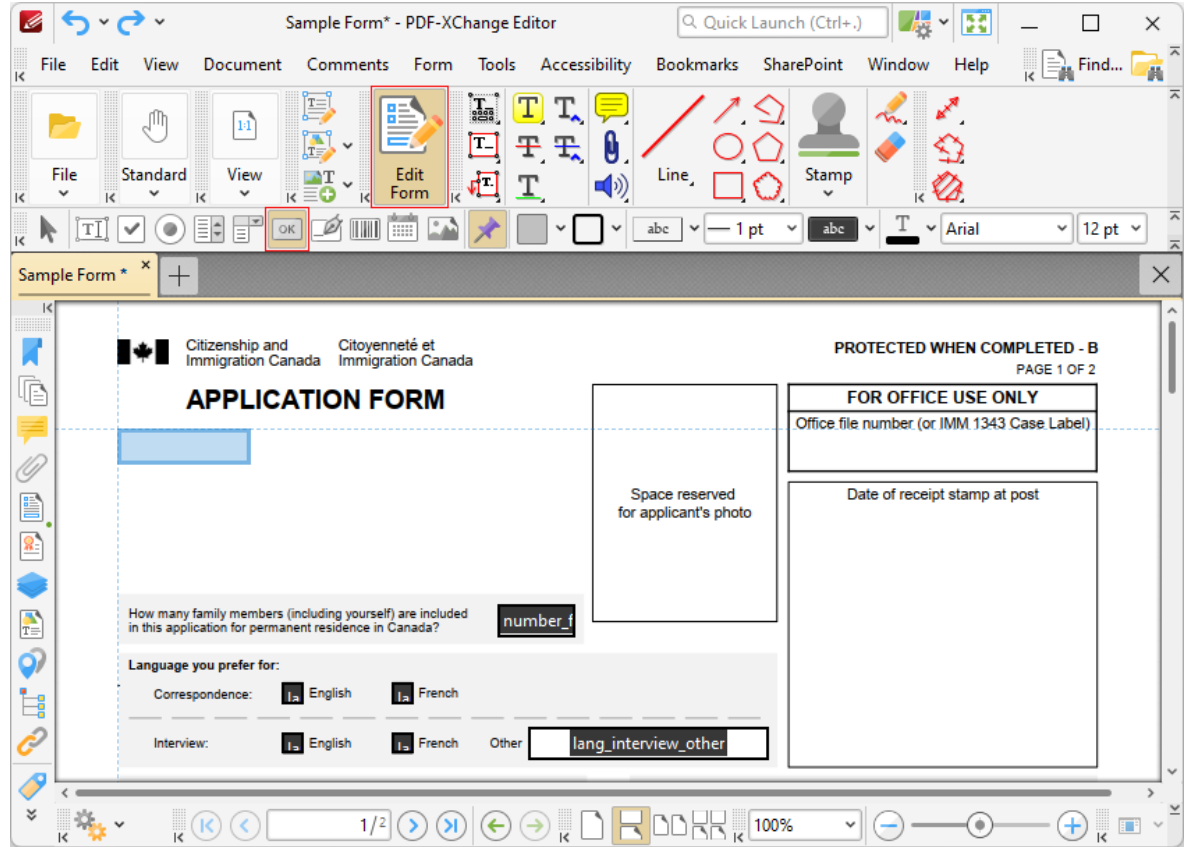
Figure 2. Active Button Tool

2. Move the rectangle to the desired location and then click to add the button to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of buttons). Added buttons appear as detailed below:
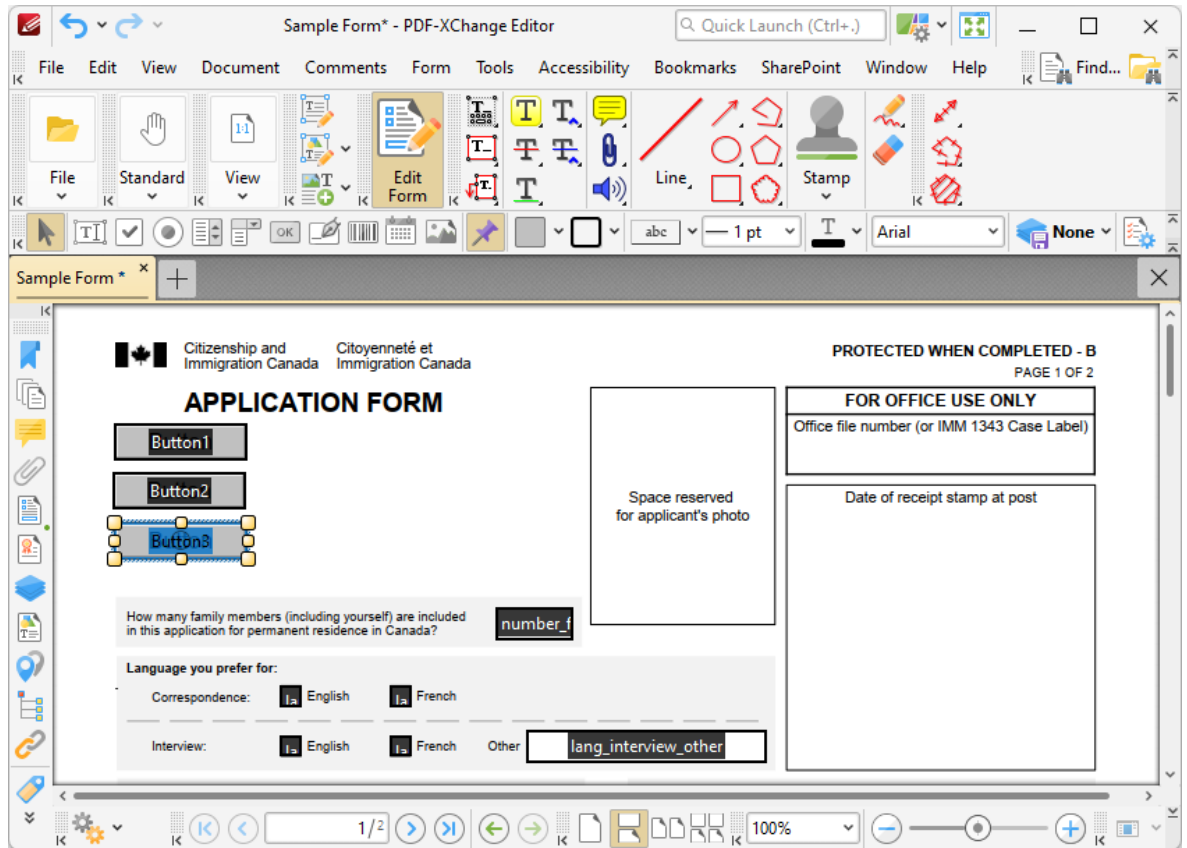
Figure 3. Added Buttons

- Click and drag the yellow control points to resize buttons.
- Use the options in the **Properties Toolbar**[485] to determine the style and appearance of buttons:
  - **Fill Color** determines the color used to fill buttons.
  - **Stroke Color** determines the border color of buttons.
  - **Border Style** determines the style of button borders.
  - **Border Width** determines the width of button borders.
  - **Text Color** determines the color of text in buttons.
  - **Font** determines the font of text in buttons.
  - **Properties** launches the **Push Button Properties** pane, which enables the customization of additional elements of buttons.

▼ **The Push Button Properties Pane**
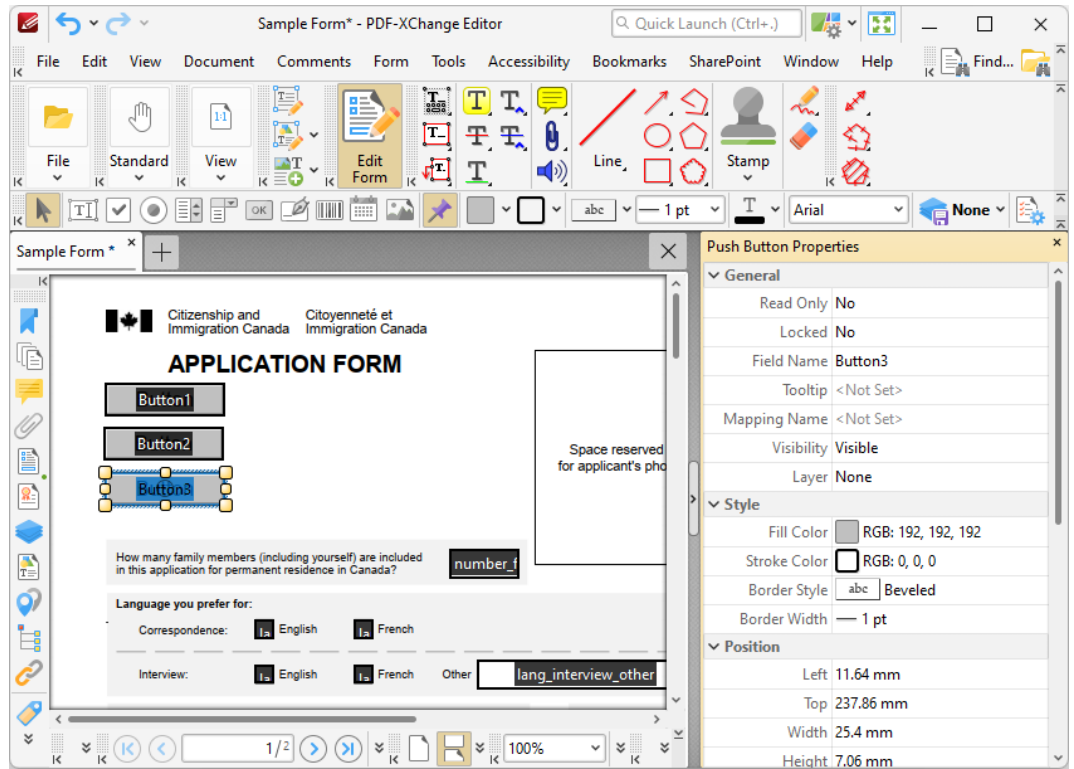
Figure 4. Button Tool, Push Button Properties Pane

The **Push Button Properties** pane can be used to determine a range of style and functionality options for buttons. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to buttons, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for buttons:

The **General** properties determine the general parameters of buttons:

- **Read Only** determines whether or not the button can be edited.
- **Locked** determines whether or not buttons can be moved, and whether or not their properties can be modified.
- **Field Name** determines the name of the button. This name is present when the **Edit Form** tool is selected, and when buttons are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the button.
- **Mapping Name** determines the mapping name that the button uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of the button.
- **Visibility** determines the visibility of the button.
- **Layer** determines the optional content layer to which the button belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of buttons. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of buttons:
- **Left** determines the distance of the button from the left margin.
- **Top** determines the distance of the button from the bottom of the page.
- **Width/Height** determine the width/height of the button.

The **Default Text Format** properties determine the default properties when text is entered into the button:
- **Font Size** is always set to **auto** for buttons. This is because the font size refers to the size of the mark when buttons are selected, and the mark must be proportionate to the size of the button.
- **Text Color** determines the color of the tick when buttons are selected.

The **Options** properties determine additional options for buttons:
- **Layout** determines the layout of the button, which can be displayed as text label, icon or a combination of both elements:
  - **Label Only** is the default setting. The text label that the **Up Label** property specifies is the only element displayed on the button.
  - **Icon Only** uses the custom image that the **Up Icon** property specifies to represent the button.
  - **Icon Top, Label Bottom** displays a custom image as the upper section of the button and the text label beneath the image.
  - **Label Top, Icon Bottom** displays the text label as the upper section of the button and a custom image beneath the text.
  - **Icon Left, Label Right** displays a custom image on the left and the text label on the right.
  - **Label Left, Icon Right** displays the text label on the left and a custom image on the right.
  - **Label over Icon** uses a custom image to represent the button and places the text label over the image.

Figure 5. Available Layout Options for Buttons

- **Behaviour** specifies the visual effect when buttons are pressed:
  - **None** specifies that no visual change occurs.
  - **Invert** inverts the fill color of the button.
  - **Outline** creates an outline around the button.
  - **Push** creates a visual effect when buttons are clicked:

Figure 6. Default to Invert (Top), Default to Outline (Centre) and Default to Push (Bottom)

- **Up Label** specifies the text that the button uses. N.b. a **Layout** property that specifies a label must be enabled for the option to be available.
- **Up Icon** specifies the icon that the button uses. N.b. a **Layout** property that specifies an icon must be enabled for the option to be available.

The **Icon Placement** properties determine settings for the icon used in the button:
- **When to Scale** determines when icons are scaled to the size of the button on which they are featured:
  - **Always** scales the icon to the size of the button in all cases.
    - **Scale Type** determines how the icon is scaled:
      - **Proportionally** retains the aspect ratio of the icon
      - **Non-proportionally** ignores the aspect ratio of the icon.
  - **Never** retains the original size of the icon regardless of the size of the button.
  - **Icon is Too Big** scales icons in cases where icons are larger than the button.

- **Icon is Too Small** scales icons in cases where icons are smaller than the button.
- **Fit to Bounds** fits the icon to the bounds of the button
- **Horizontal Position** determines the horizontal position of the icon in the button.
- **Vertical Position** determines the vertical position of the icon in the button.

The **Actions** properties determine the action taken when users interact with the button:

- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the button.
- **Mouse Leave** initiates an action when the pointer moves out of the button.
- **On Focus** initiates an action when the button is selected.
- **On Blur** initiates an action when the button is deselected.
- Click the ellipsis icon on the right of actions to add/edit button actions:
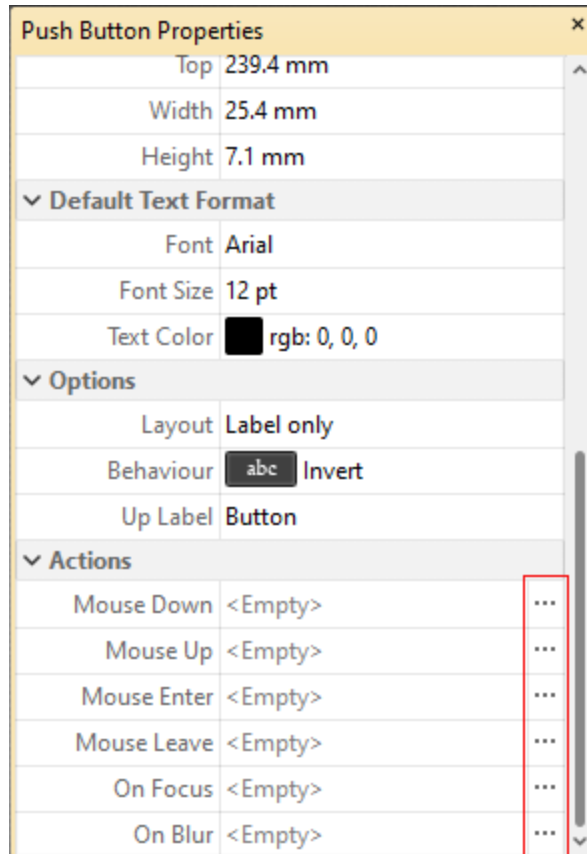
Figure 7. Push Button Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

▼ Button Creation Example

The following example will detail the creation of a button that contains an icon and text, and activates a link to the **PDF-XChange** website when it is clicked:

1. Click **Edit Form,** then click the **Button** icon in the **Form Toolbar** (these locations are highlighted in the image below). The blue rectangle that represents the button will be displayed:
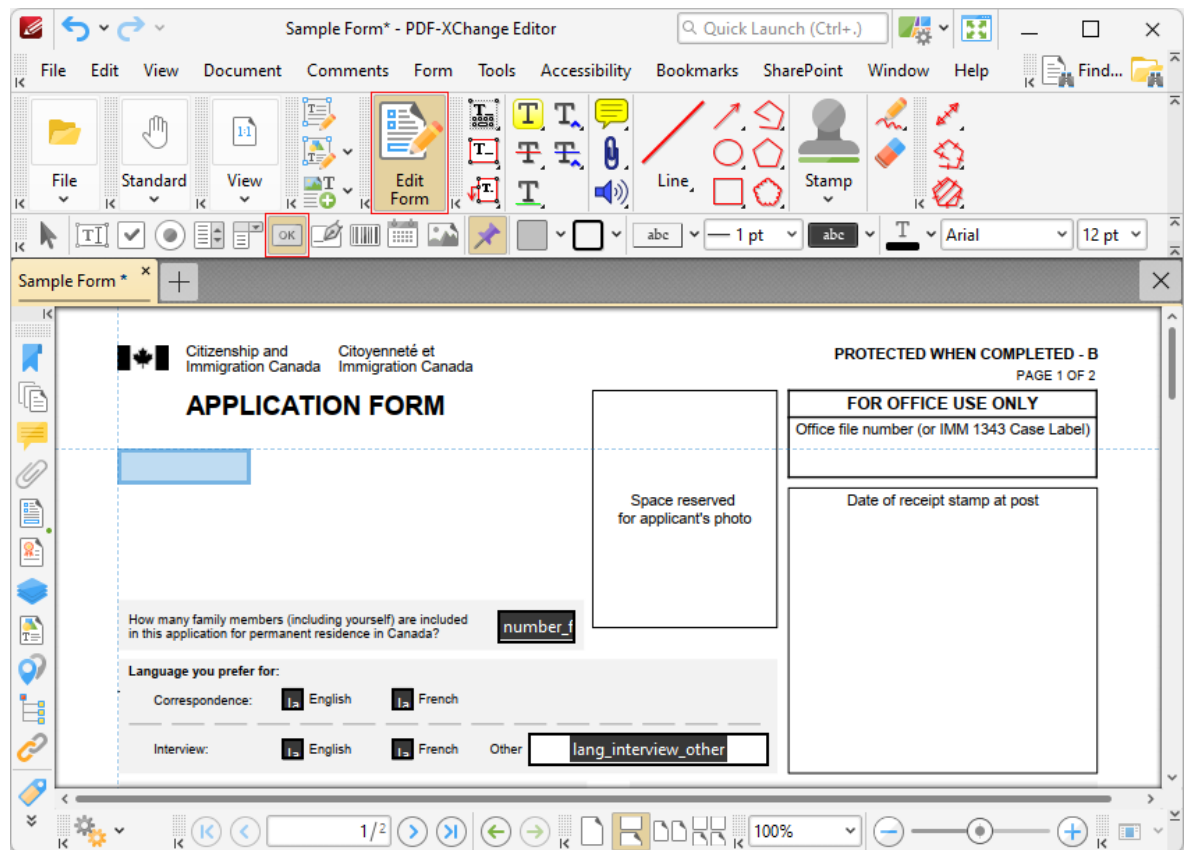
Figure 8. Active Button Tool

2. Click to add the button, then right-click it and click **Properties** to open the **Push Button Properties** pane:
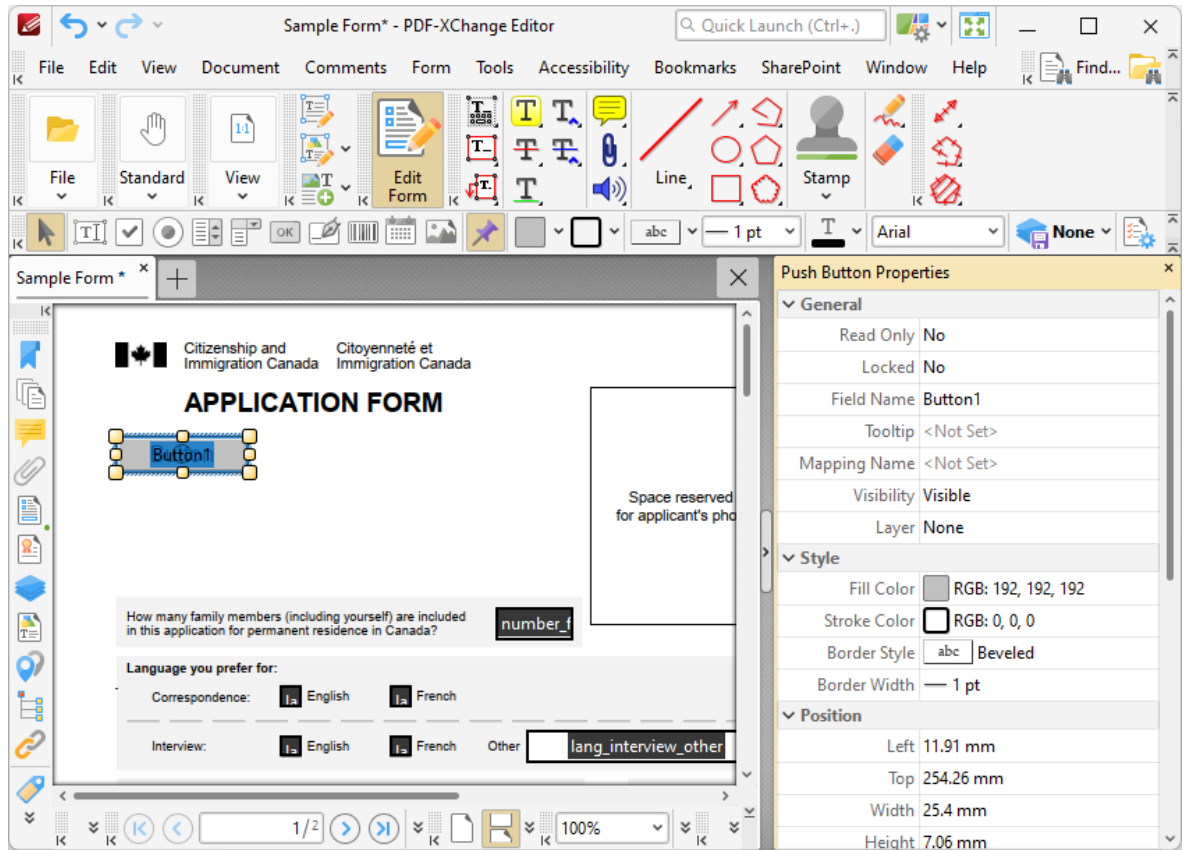
Figure 9. Active Button Tool, Push Button Properties Pane

3. Scroll down the **Push Button Properties** pane to the **Up Label** property, and then enter the text **"Open Website":**
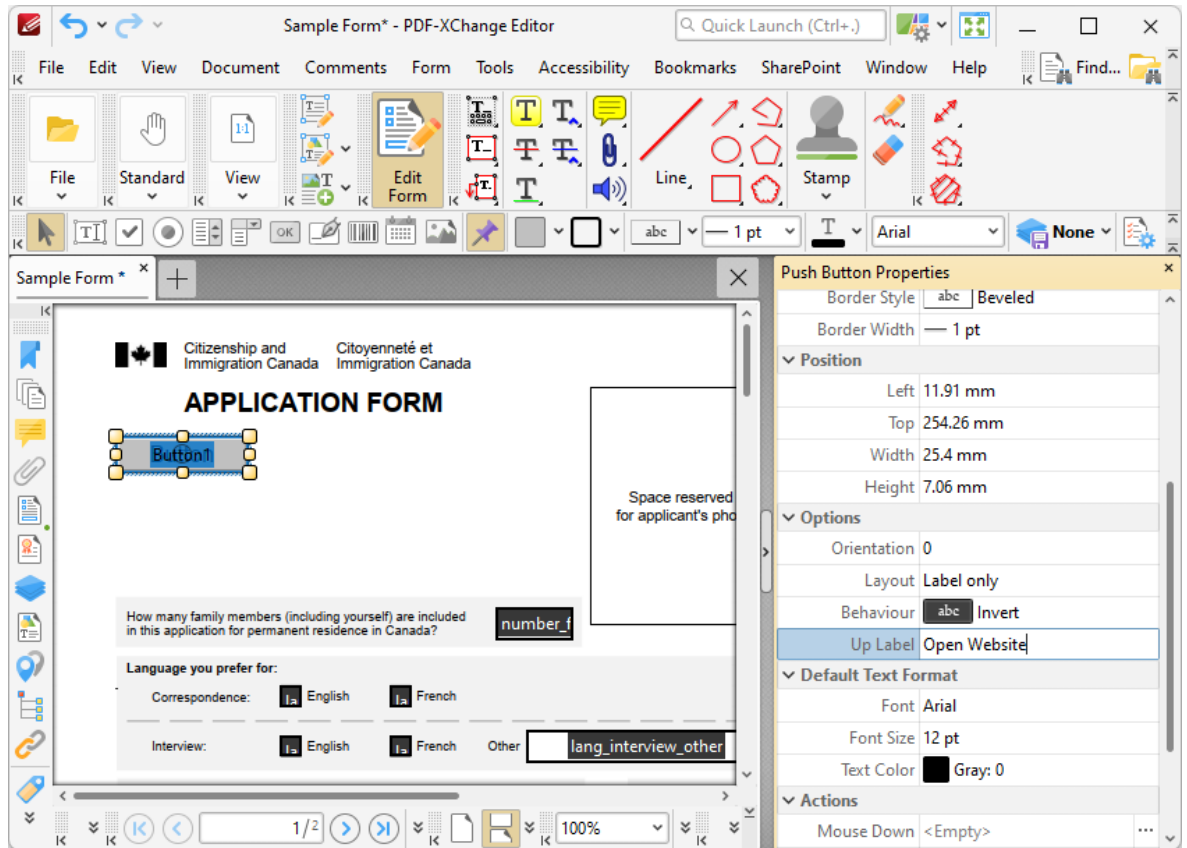
Figure 10. Active Button Tool, Up Label Property Edited

The button now needs to be resized, as the text does not fit comfortably within it:

4. Click **Edit Form,** then click the button to select it. Yellow control points will appear around the button. Click and drag the control points to resize the button:
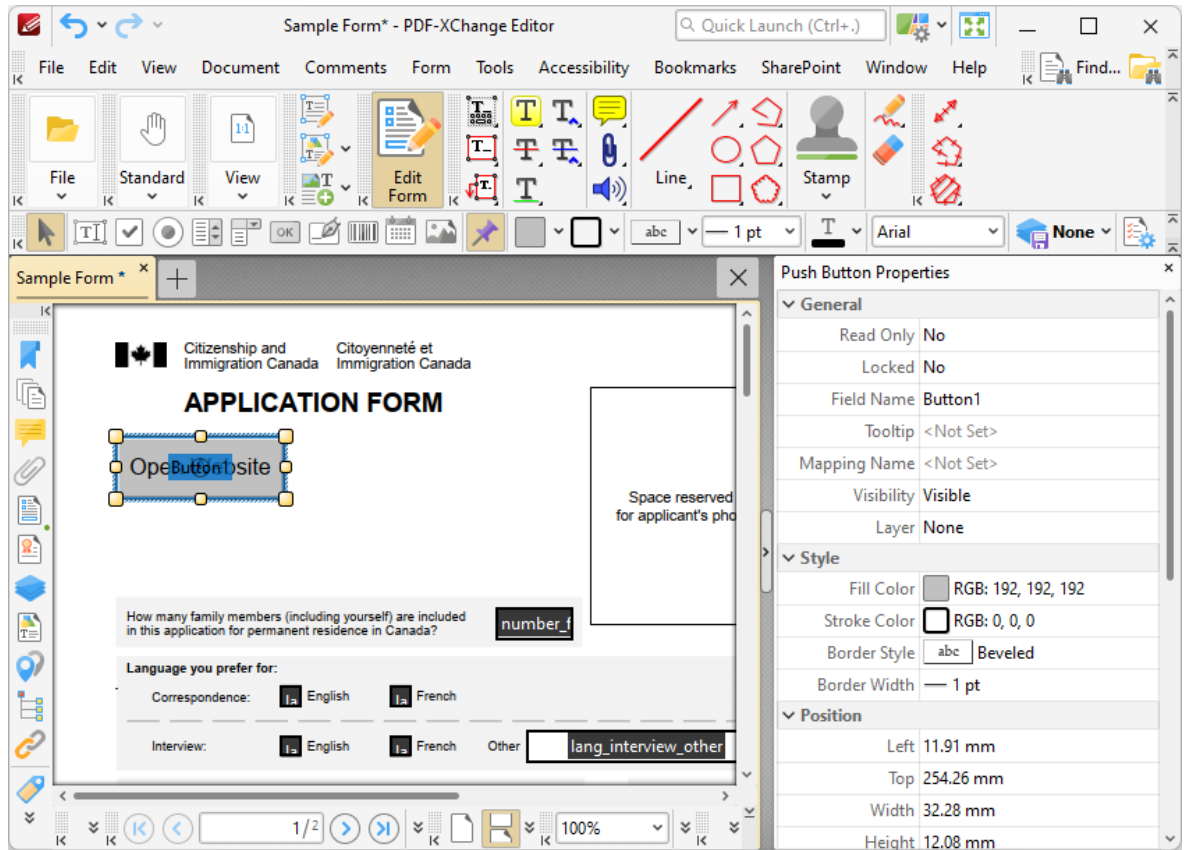
Figure 11. Resized Button

The next step is to add an icon to the button:

5. Click **Edit Form,** and then select the button to view its properties in the **Push Button Properties** pane. Move to the **Options** tab, then select **Icon top, label button** for the **Layout** property. The **Up Icon** property will appear. Click the ellipsis icon on the right of the **Up Icon** property to select the desired icon from the local computer:
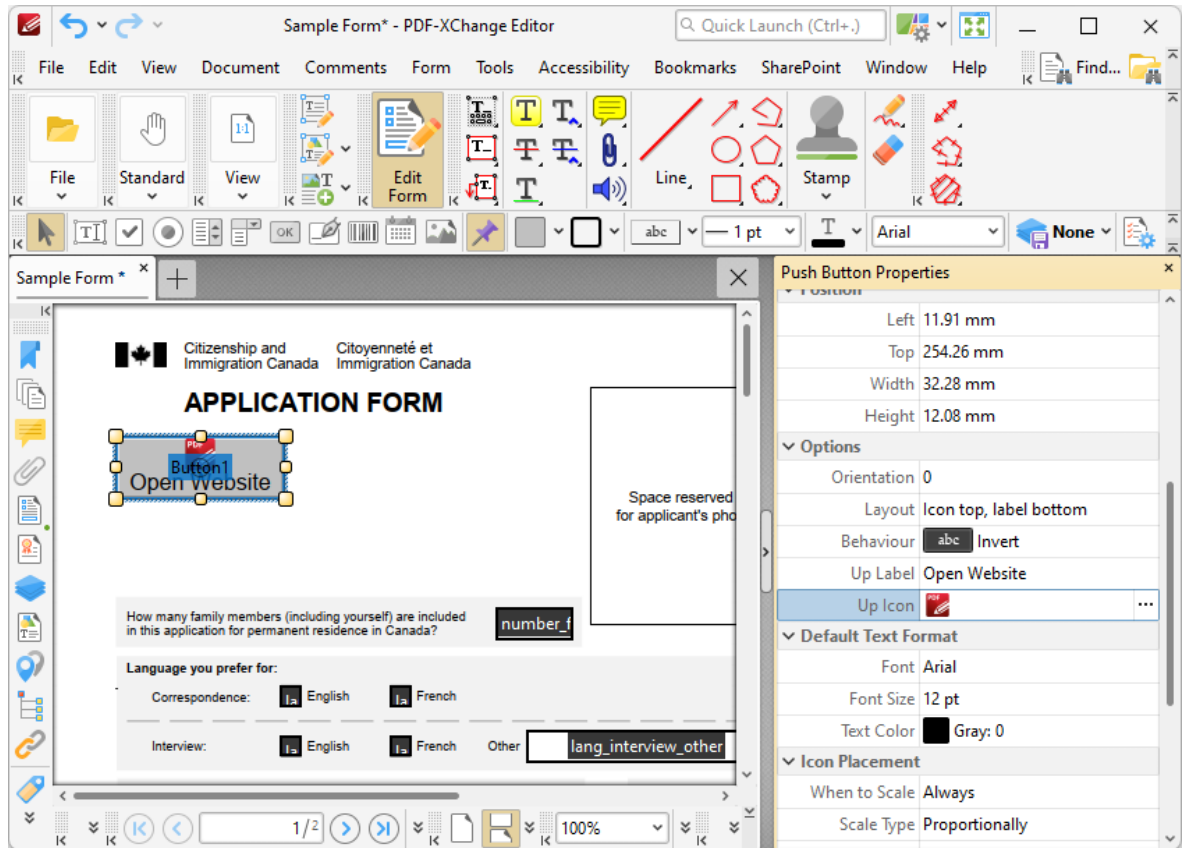
Figure 12. Push Button Properties Pane, Options Properties

The next step is to add the action to the button:

6. Click **Edit Form,** and then right-click the button and click **Properties** to view its properties in the **Push Button Properties** pane. Scroll down the **Push Button Properties** pane to the **Actions tab,** then click the ellipsis icon on the right of the **Mouse Up** property:
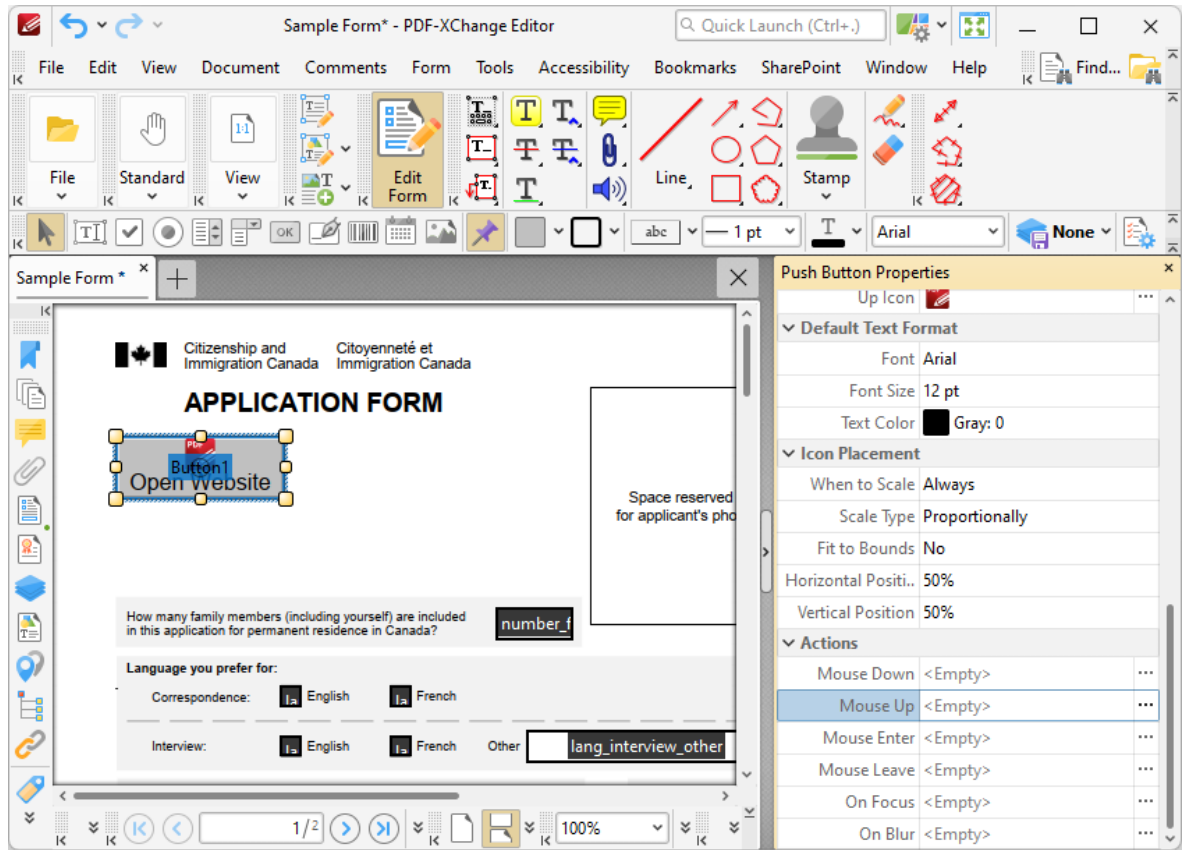
Figure 13. Push Button Properties Pane, Mouse Up Property

The **Edit Action List** dialog box will open.

7. Click **Add** and then click **Open a Web Link** in the submenu:
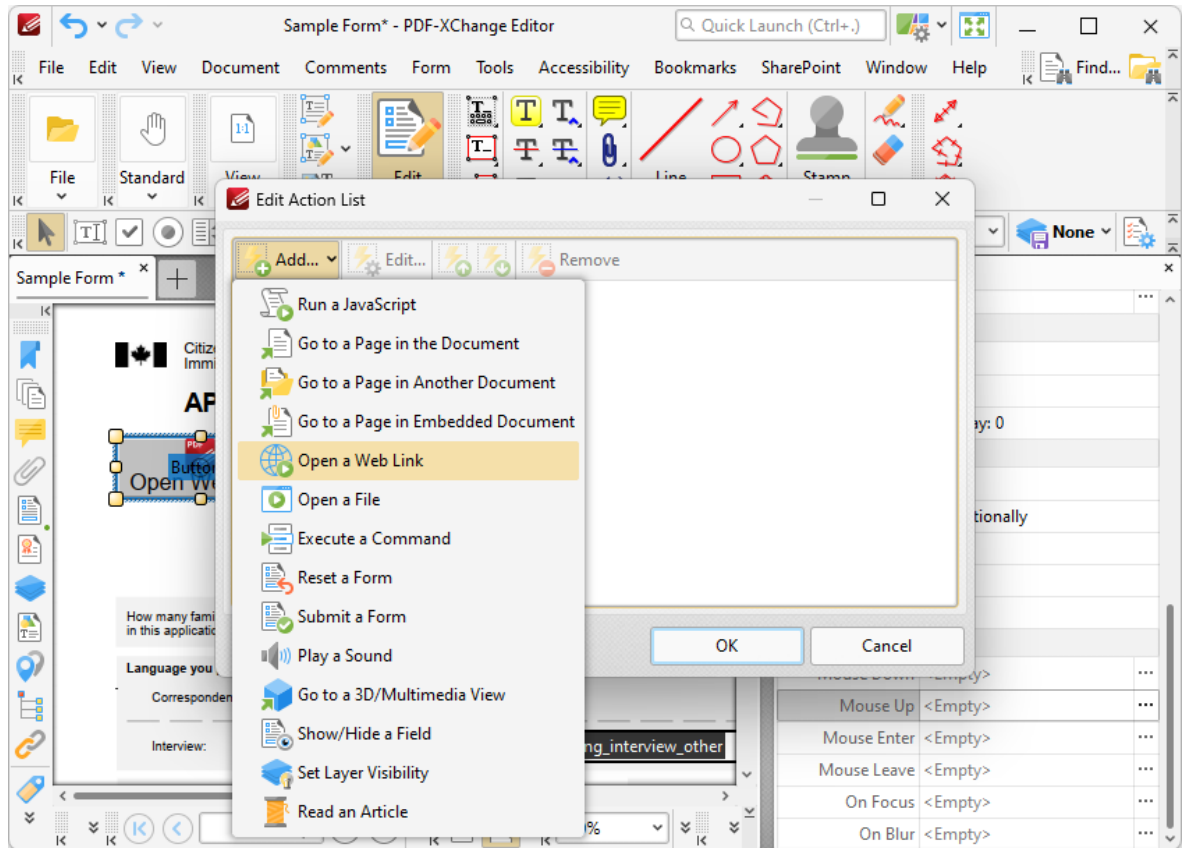
Figure 14. Button Tool, Edit Action List Dialog Box

The **Add Action: "Open a Web Link"** dialog box will open.

8. Enter the desired internet location for the button to launch when it is clicked and then click **OK** in both dialog boxes:
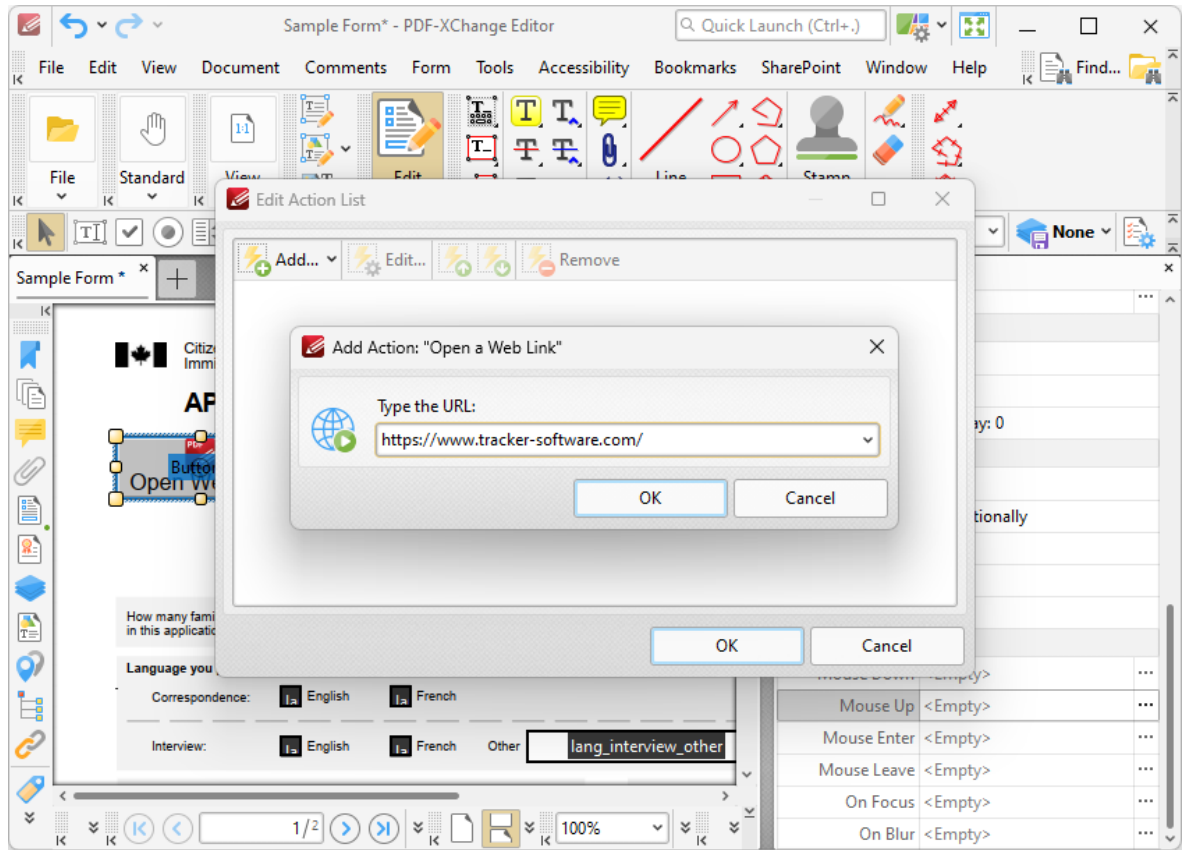
Figure 15. Button Tool, Add Action: "Open a Web Link" Dialog Box

The button is then complete and will launch the **PDF-XChange** website when it is clicked:
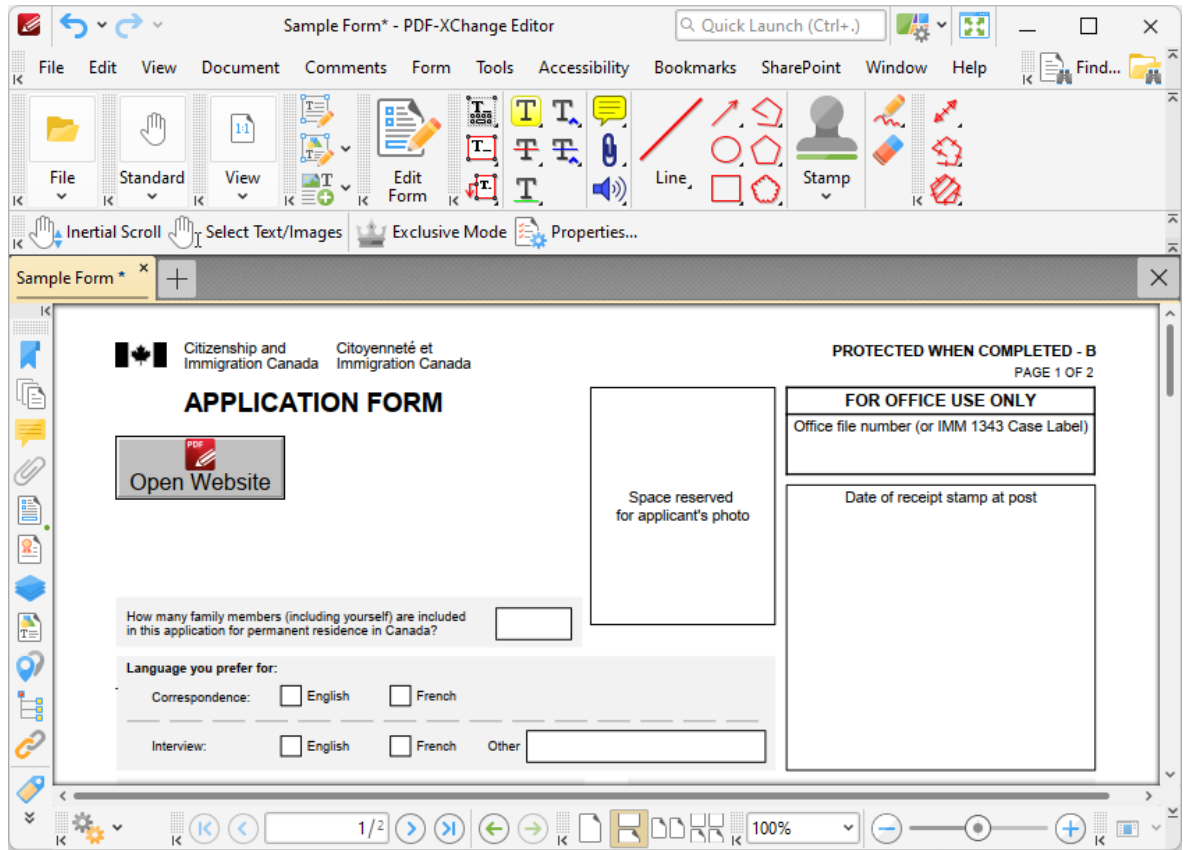
Figure 16. Completed Button

5.3.1.2.7 Add Digital Signature Fields to Documents

 Add Digital Signature Fields to Documents

Digital signatures are used to demonstrate the authenticity of documents and increase their security. They can also be used to determine editing permissions for documents and/or utilize timestamp servers in order to further increase document security and integrity:
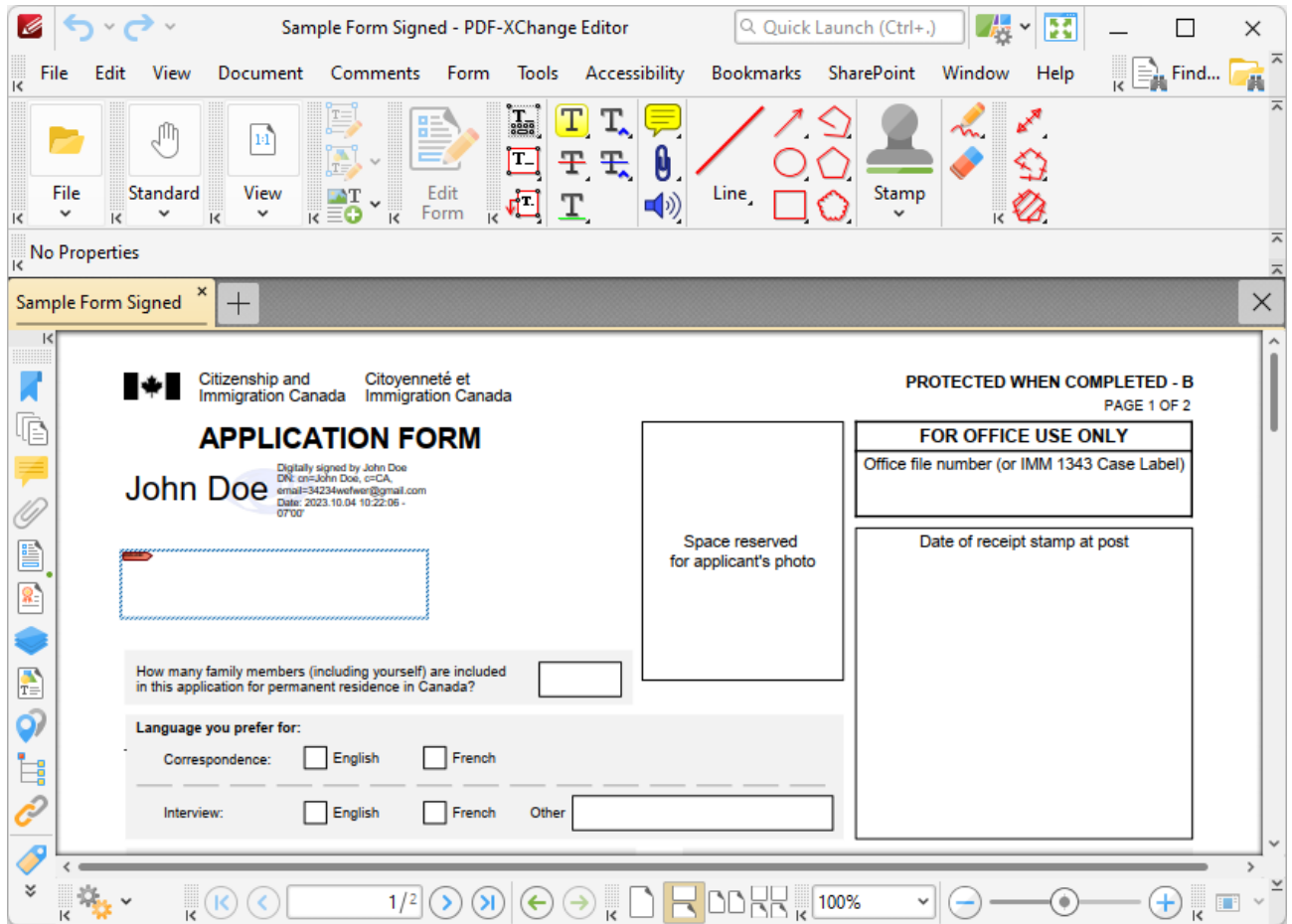
Figure 1. Sample Signature Fields, Signed (above) and Unsigned (below)

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for signature fields, as detailed below. Click the dropdowns for further information:

▼ **Add Digital Signature Fields to Documents**

1. Click **Edit Form,** then click the **Digital Signature** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the signature field:
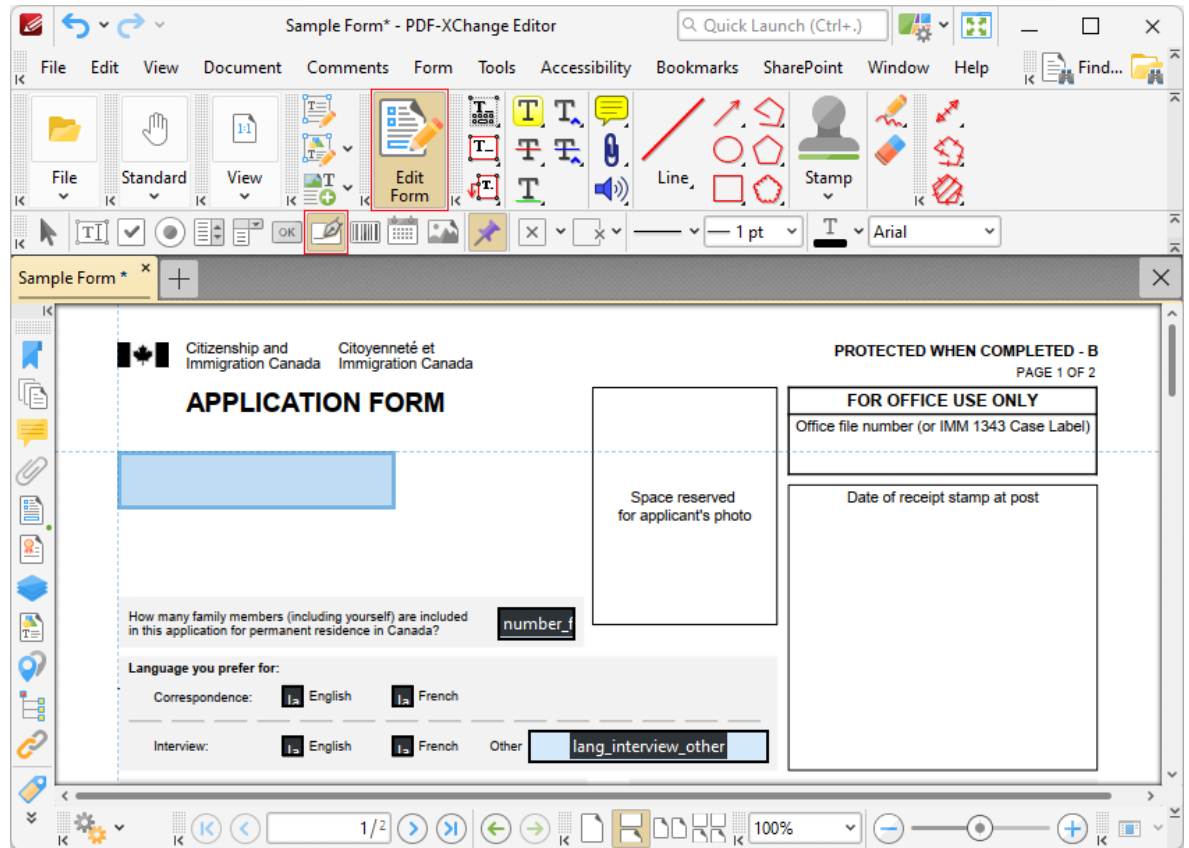
Figure 2. Active Signature Field Tool

2. Move the rectangle to the desired location and then click to add the signature field to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of signature fields). Added signature fields appear as detailed below:
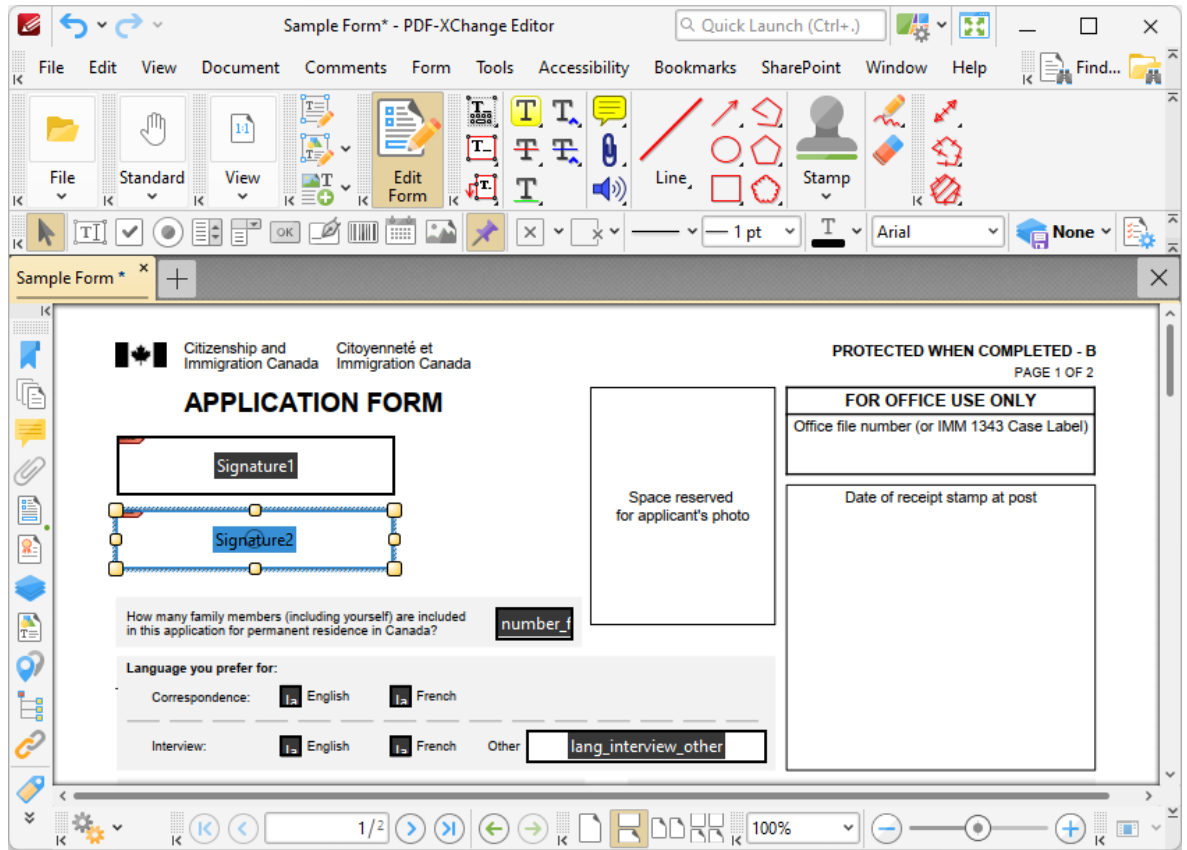
Figure 3. Added Signature Fields

- Click and drag the yellow control points to resize signature fields.
- Use the options in the **Properties Toolbar**[485] to determine the style and appearance of signature fields:
  - **Fill Color** determines the color used to fill signature fields.
  - **Stroke Color** determines the border color of signature fields.
  - **Border Style** determines the style of signature field borders.
  - **Border Width** determines the width of signature field borders.
  - **Text Color** determines the color of text in signature fields when they are signed.
  - **Font** determines the font of text in signature fields.
  - **Properties** launches the **Digital Signature Properties** pane, which enables the customization of additional elements of signature fields.

▼ **The Digital Signature Properties Pane**
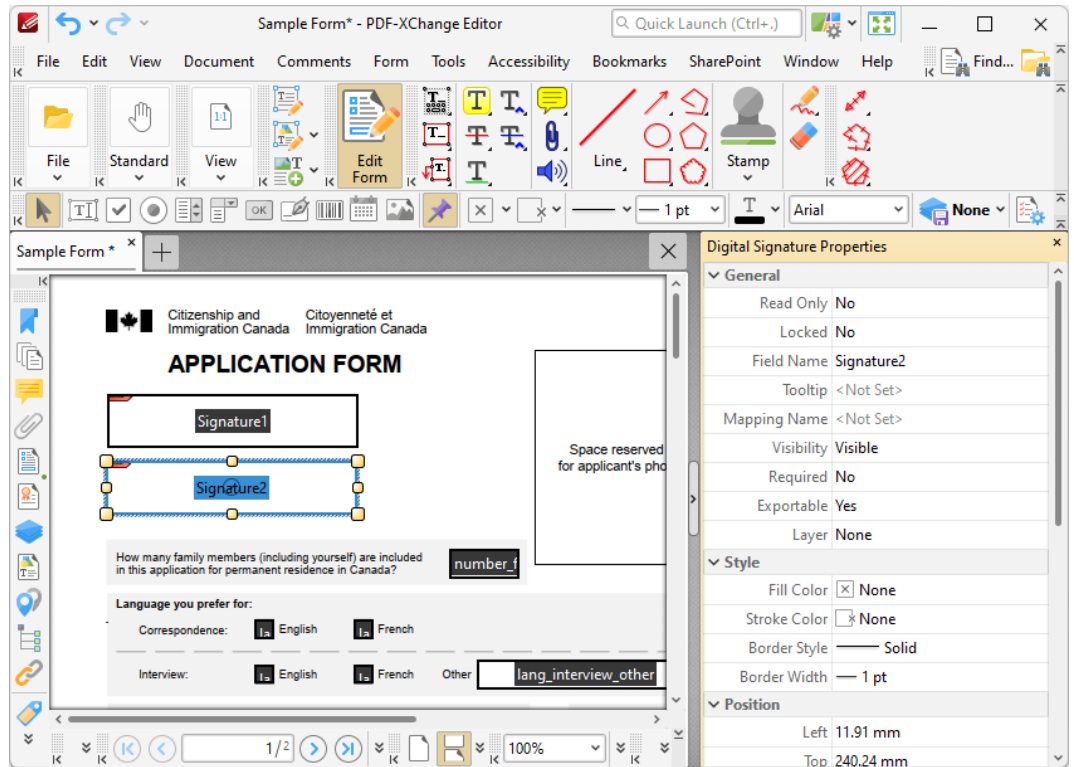
Figure 4. Signature Field Tool, Digital Signature Properties Pane

The **Digital Signature Properties** pane can be used to determine a range of style and functionality options for signature fields. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to signature fields, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for signature fields:

The **General** properties determine the general parameters of signature fields:
- **Read Only** determines whether or not the signature field can be edited.
- **Locked** determines whether or not signature fields can be moved, and whether or not their properties can be modified.
- **Field Name** determines the name of the signature field. This name is present when the **Edit Form** tool is selected, and when signature fields are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the signature field.
- **Mapping Name** determines the mapping name that the signature field uses. This name is used to reference interactive form data when the form is

exported, and does so without affecting the appearance of the name in the original document.
- **Orientation** determines the orientation of the signature field.
- **Visibility** determines the visibility of the signature field.
- **Required** determines whether or not the digital signature field is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the digital signature field data can be exported from the form.
- **Layer** determines the optional content layer to which the digital signature field belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of signature fields. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of signature fields:
- **Left** determines the distance of the signature field from the left margin.
- **Top** determines the distance of the signature field from the bottom of the page.
- **Width/Height** determine the width/height of the signature field.

The **Default Text Format** properties determine the default properties when text is entered into the signature field:
- **Font** determines the font used for digital signature fields.
- **Font Size** determines the size of the font.
- **Text Color** determines the color of the text.

The **Actions** properties determine the action taken when users interact with the signature field:
- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the signature field.
- **Mouse Leave** initiates an action when the pointer moves out of the signature field.
- **On Focus** initiates an action when the signature field is selected.
- **On Blur** initiates an action when the signature field is deselected.
- Click the ellipsis icon on the right of actions to add/edit signature field actions:
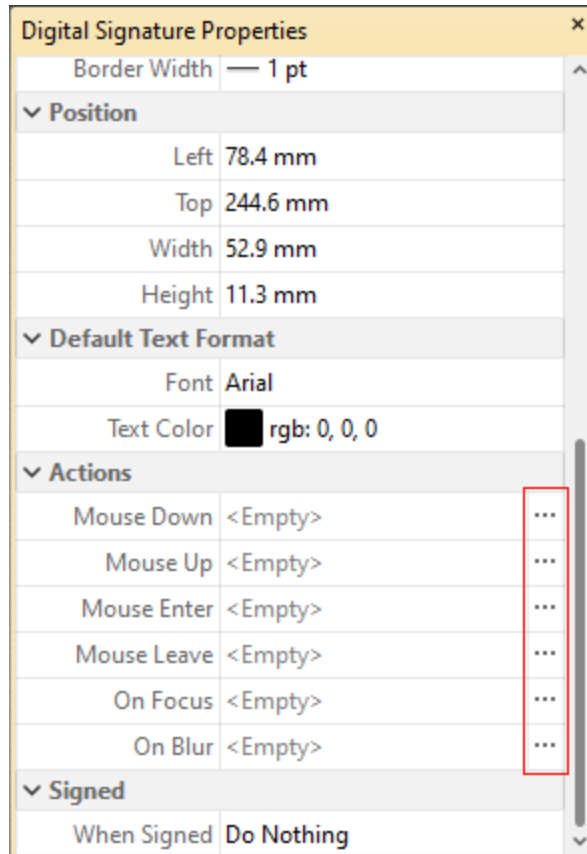
Figure 5. Digital Signature Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

The **When Signed** property determines the action taken when signature fields are signed:

- **Do Nothing** determines that no action is taken.
- **Custom Action** enables the activation of custom JavaScript when signature fields are signed. When this option is selected the **Action** property will appear. Click the ellipsis icon on the right of the property to add JavaScript:
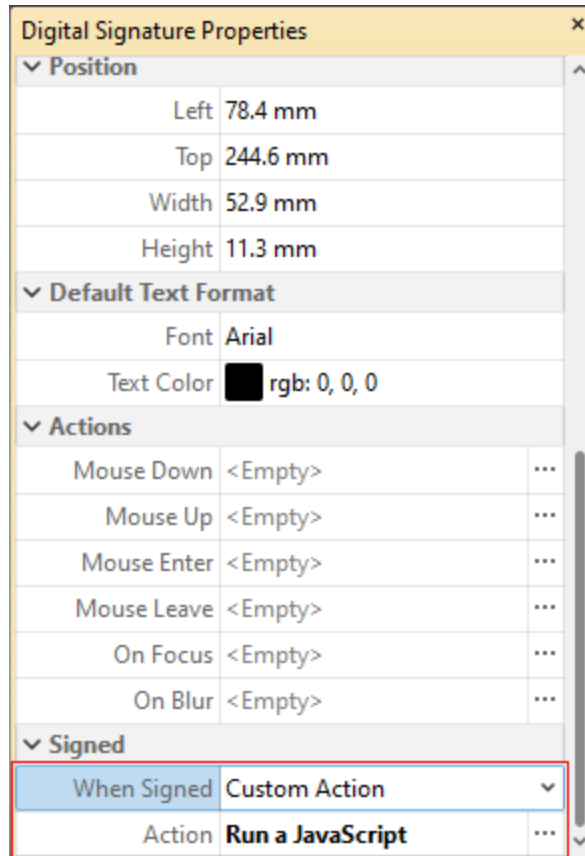
Figure 6. Digital Signature Properties Pane, Action Property

The **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**

Figure 7. Edit Action: "Run a JavaScript" Dialog Box

- **Mark as Read-Only** classifies specified fields as read-only in order to disable subsequent editing. When this option is selected, the **Fields Range** property will appear beneath the **When Signed** property:
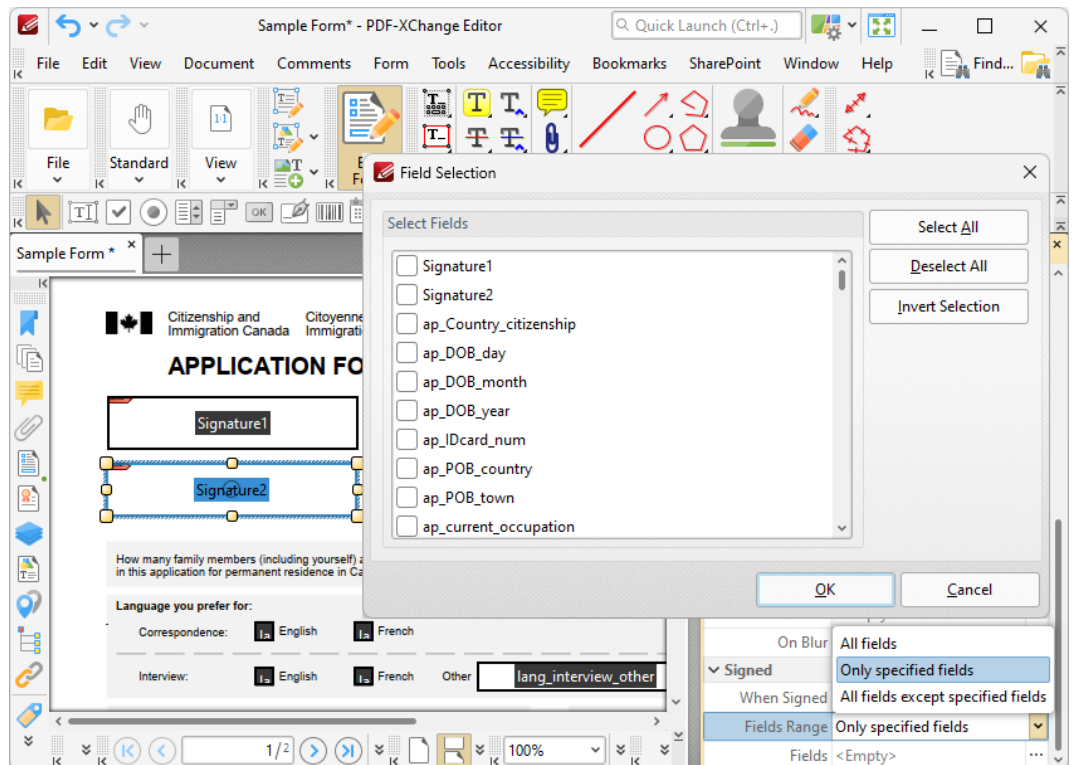
- Select **All fields** to set all fields in the document as read-only.
- Select **Only specified Fields** to specify the fields that are set as read-only.
- Select **All fields except specified** to specify the fields that are not set as read-only.

The **Fields** property will become available when an option to specify fields is selected. Click the ellipsis icon on the right of the property to specify fields. The **Field Selection** dialog box detailed in *(figure 8)* will open. Select the desired fields and then click **OK.**

▼ Signature Field Creation Example

The following example will detail the creation of a signature field that displays a tooltip when the pointer is hovered over it, and creates a bookmark for the current page when it is clicked:

1. Click **Edit Form,** then click the **Digital Signature** icon in the **Form Toolbar** (these locations are highlighted in the image below). The blue rectangle that represents the signature field will be displayed:
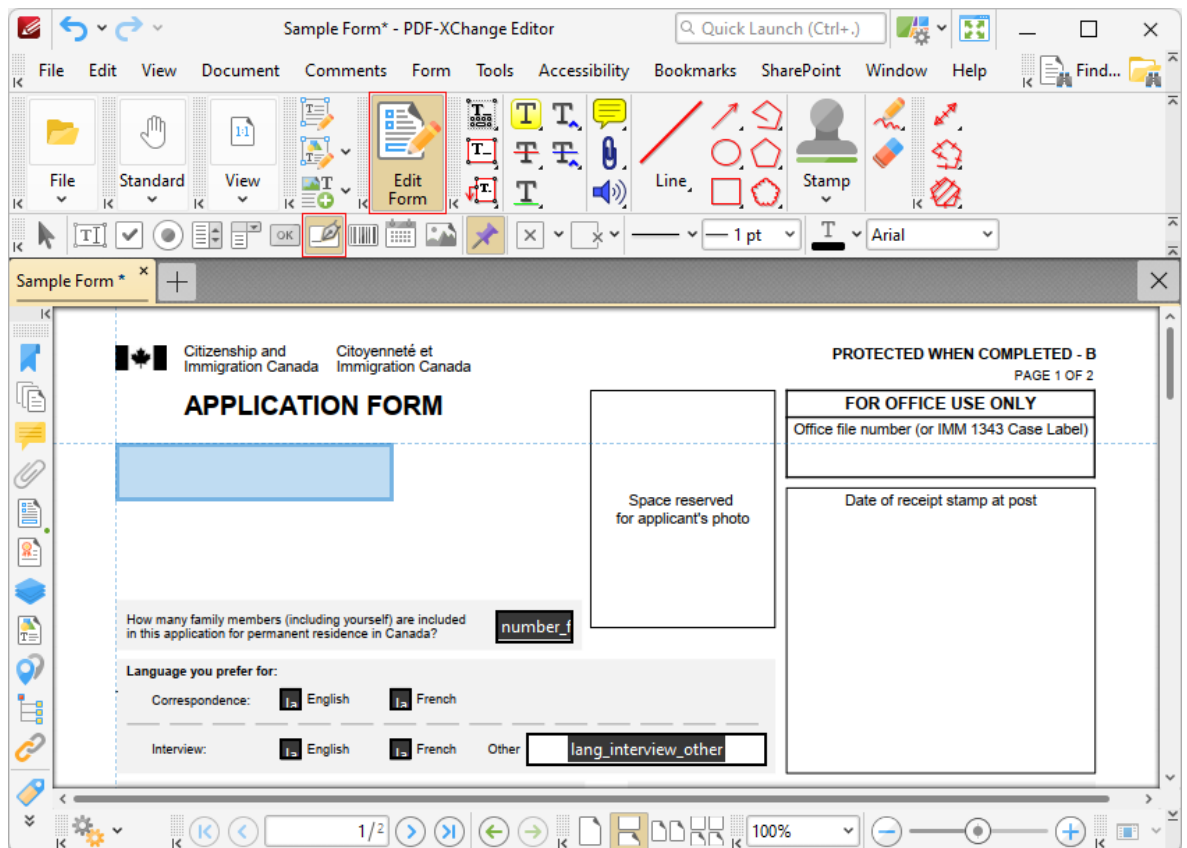
Figure 9. Active Barcode Tool

2. Click to add the signature field, then right-click it and click **Properties** to open the **Digital Signature Properties** pane:
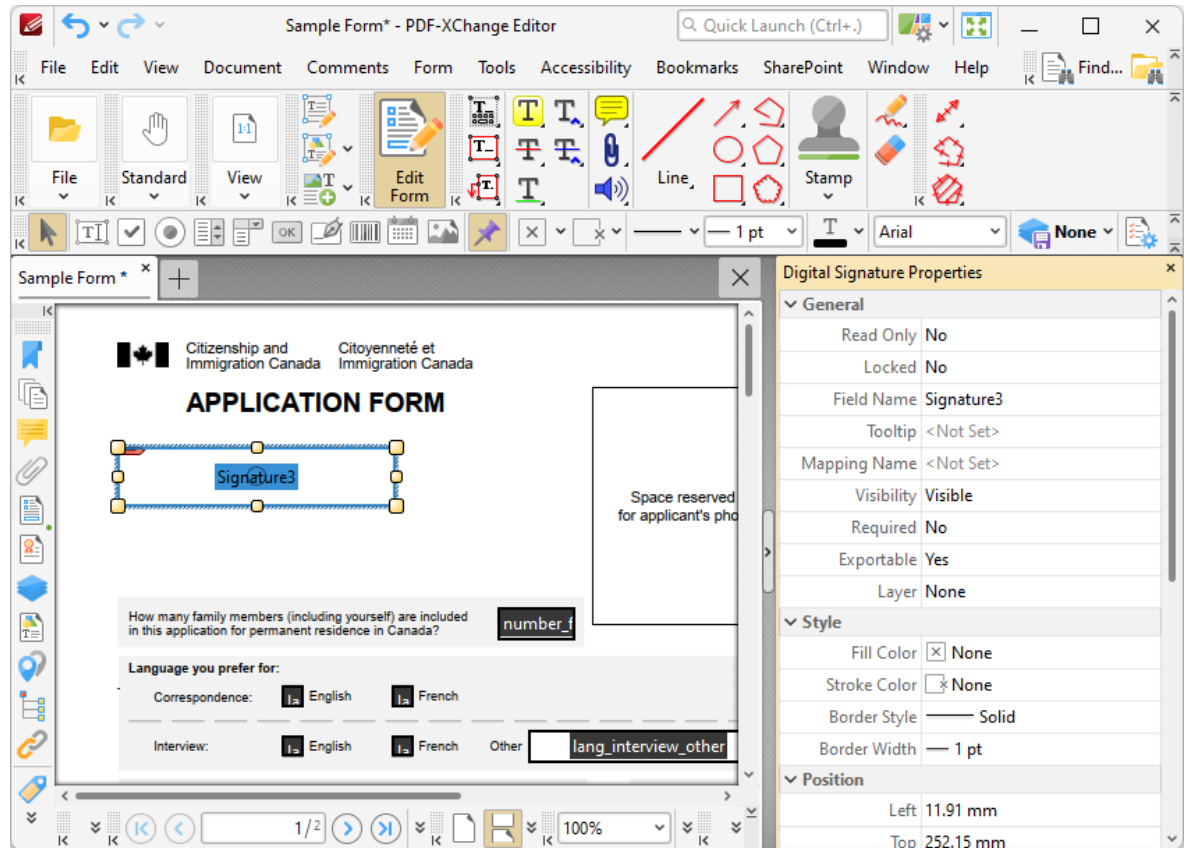
Figure 10. Active Button Tool, Digital Signature Properties Pane

3. Click the **Tooltip** property in the **Digital Signature Properties** pane and enter the desired text for the tooltip:
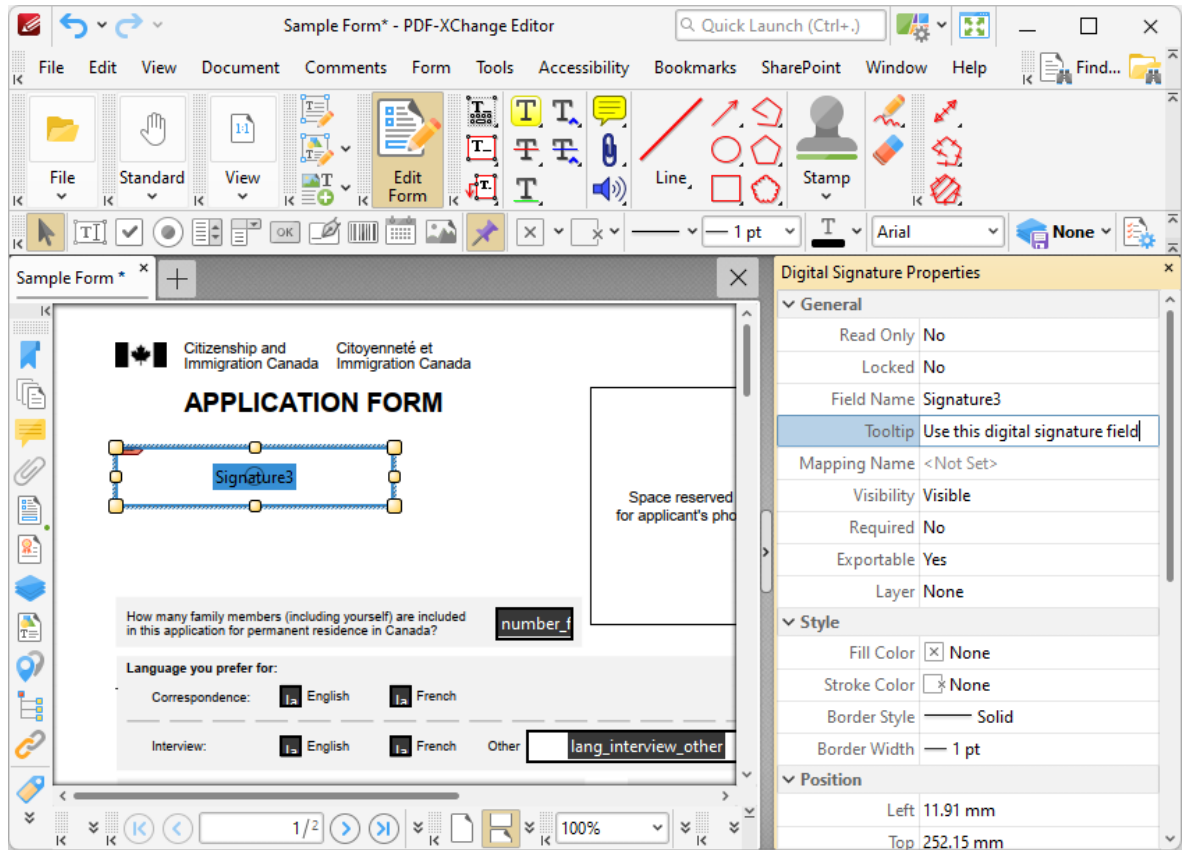
Figure 11. Digital Signature Properties Pane, Tooltip Property

4. Scroll down the **Digital Signature Properties** pane to the **Actions** properties and click the ellipsis icon on the right of the **Mouse Up** property:
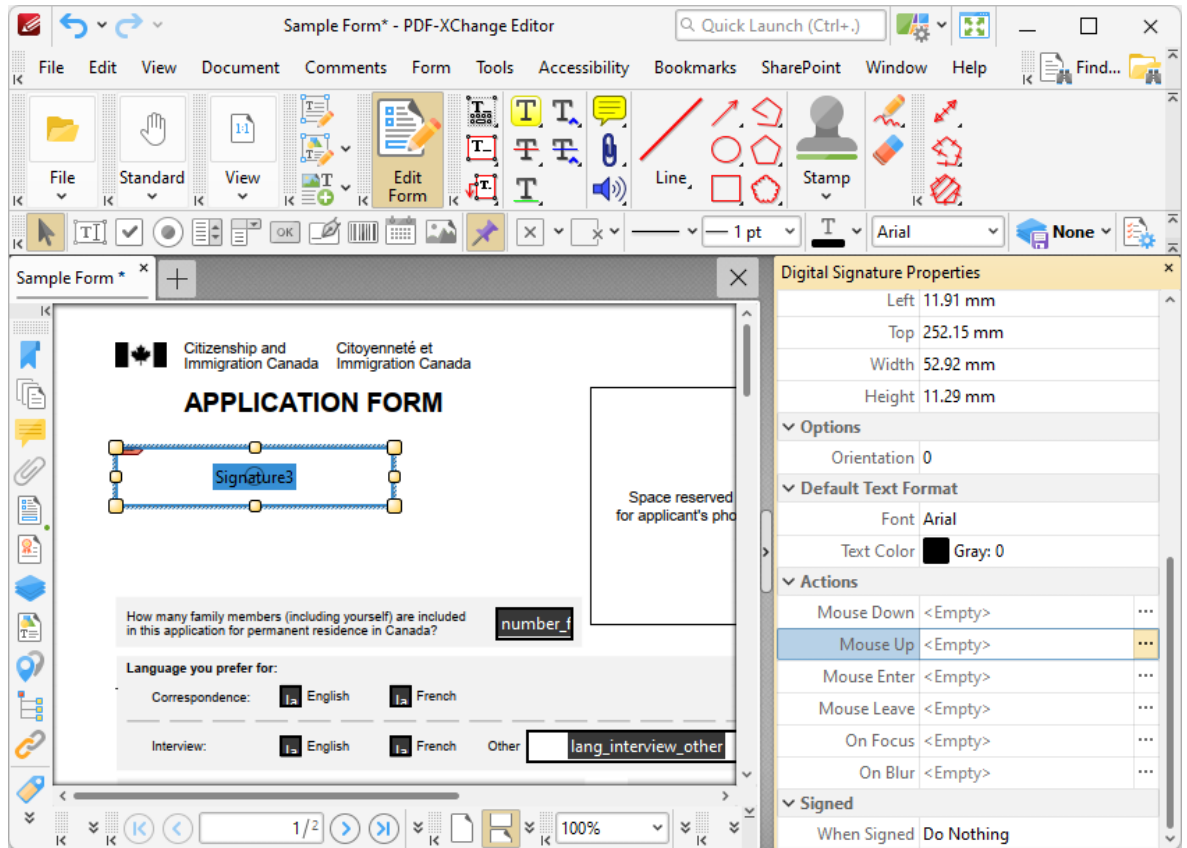
Figure 12. Digital Signature Properties Pane, Mouse Up Property

The **Edit Action List** dialog box will open.

5. Click **Add** in the **Edit Action List** dialog box and then click **Execute a Command** in the dropdown menu:
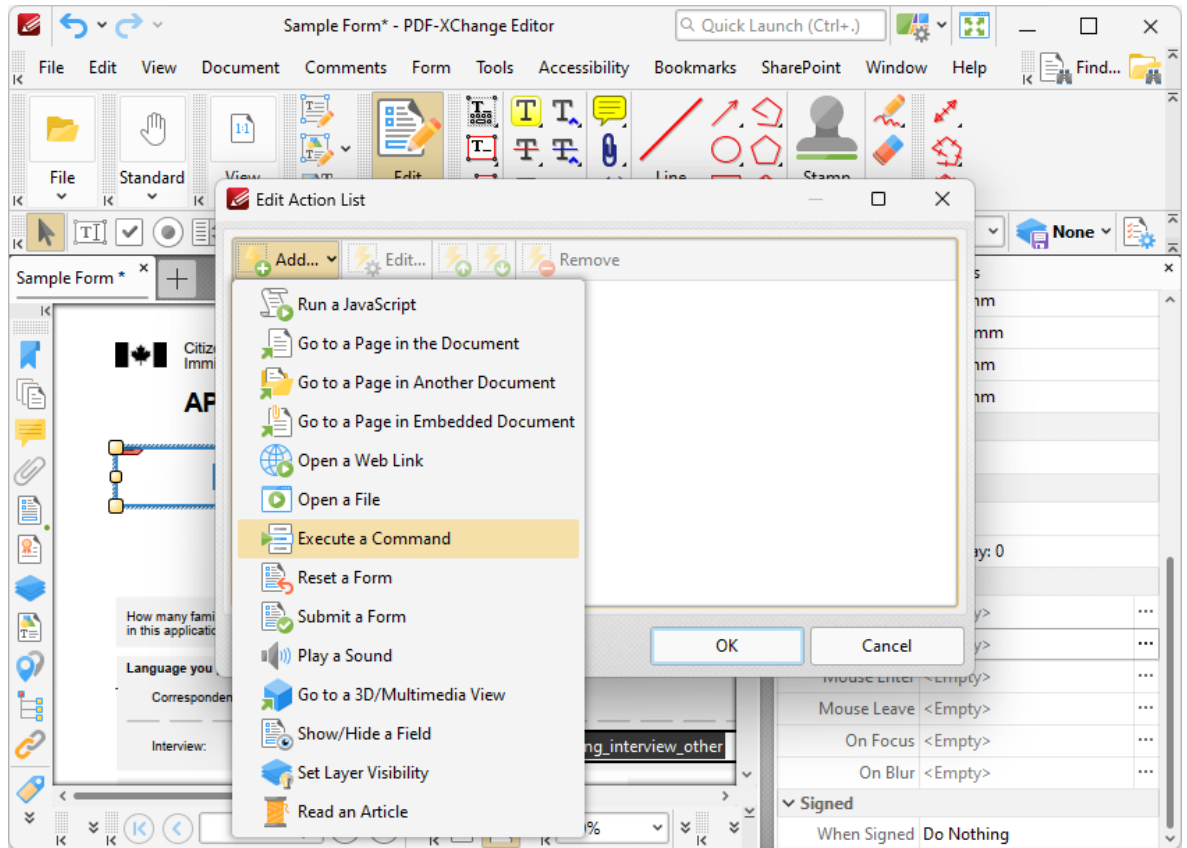
Figure 13. Edit Action Dialog Box, Execute a Command

The **Add Action: "Execute a Command"** dialog box will open.

6. Click the dropdown menu, then scroll down to and click the **NewBookmark** command:
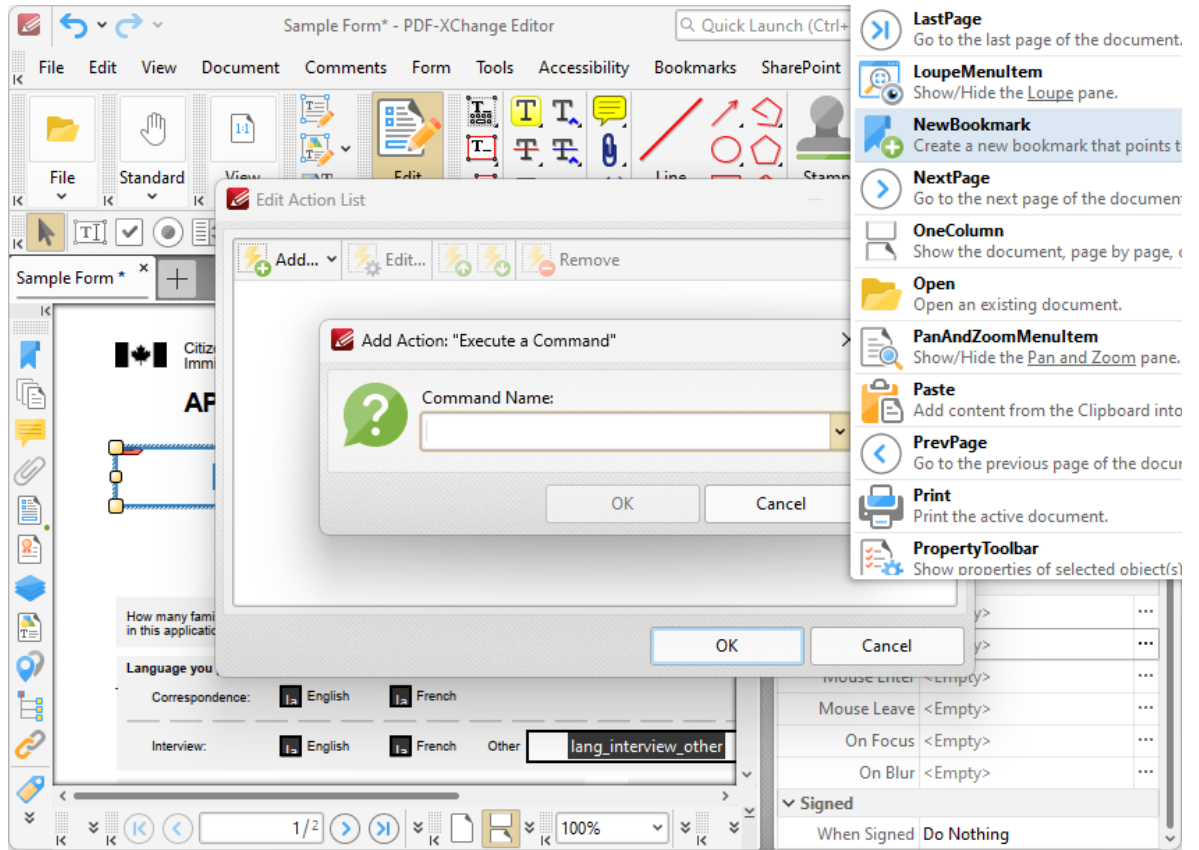
Figure 14. New Bookmark Command

7. Click **OK** in both open dialog boxes:
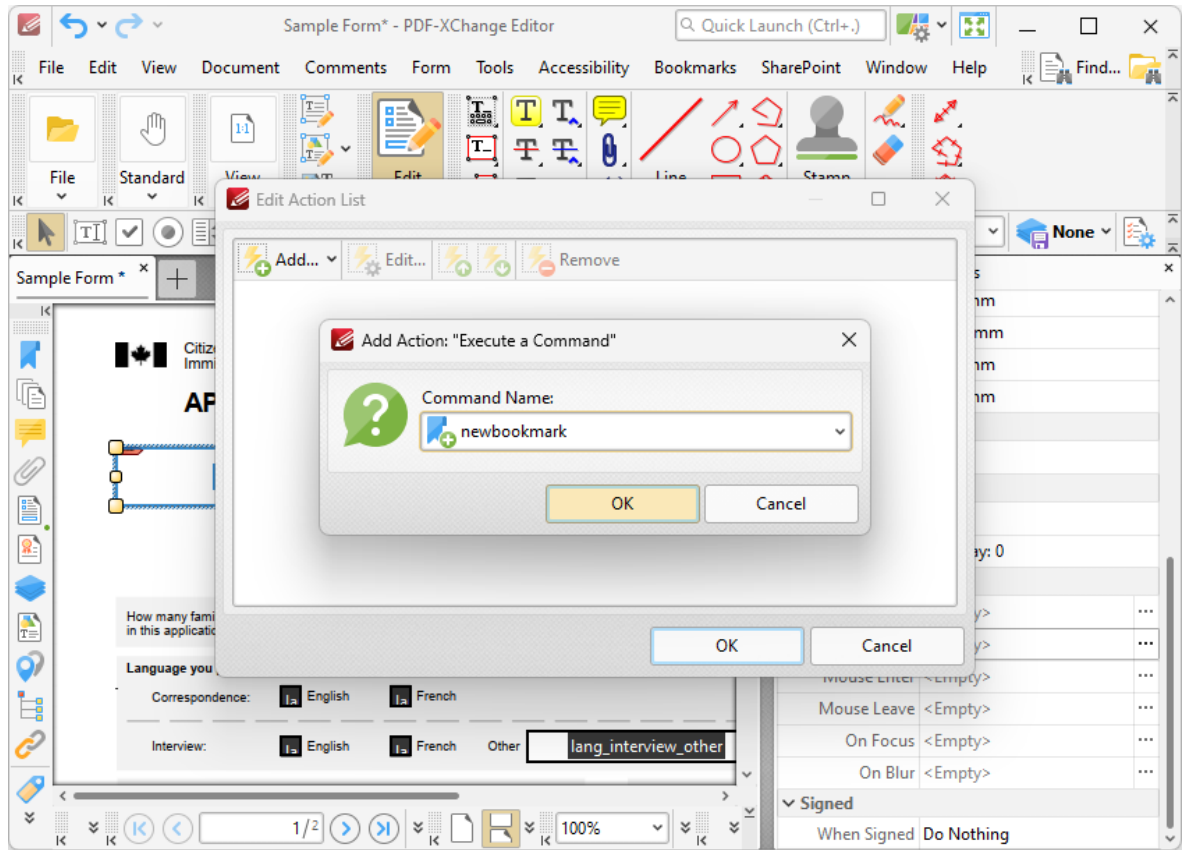
Figure 15. Open Dialog Boxes

The signature field is then complete. The tooltip entered at step three will be present when the pointer is hovered over the signature field:
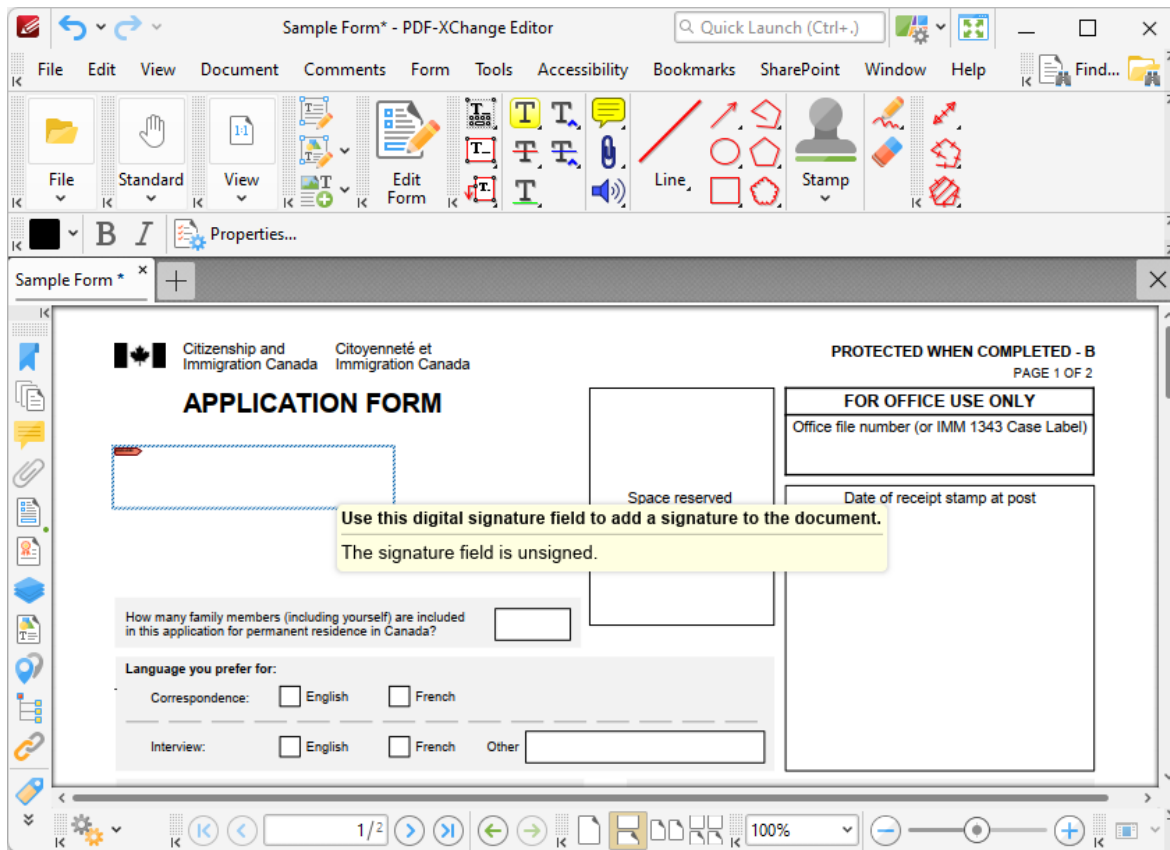
Figure 16. Active Tooltip

A new bookmark is created for the current page when the signature field is clicked:
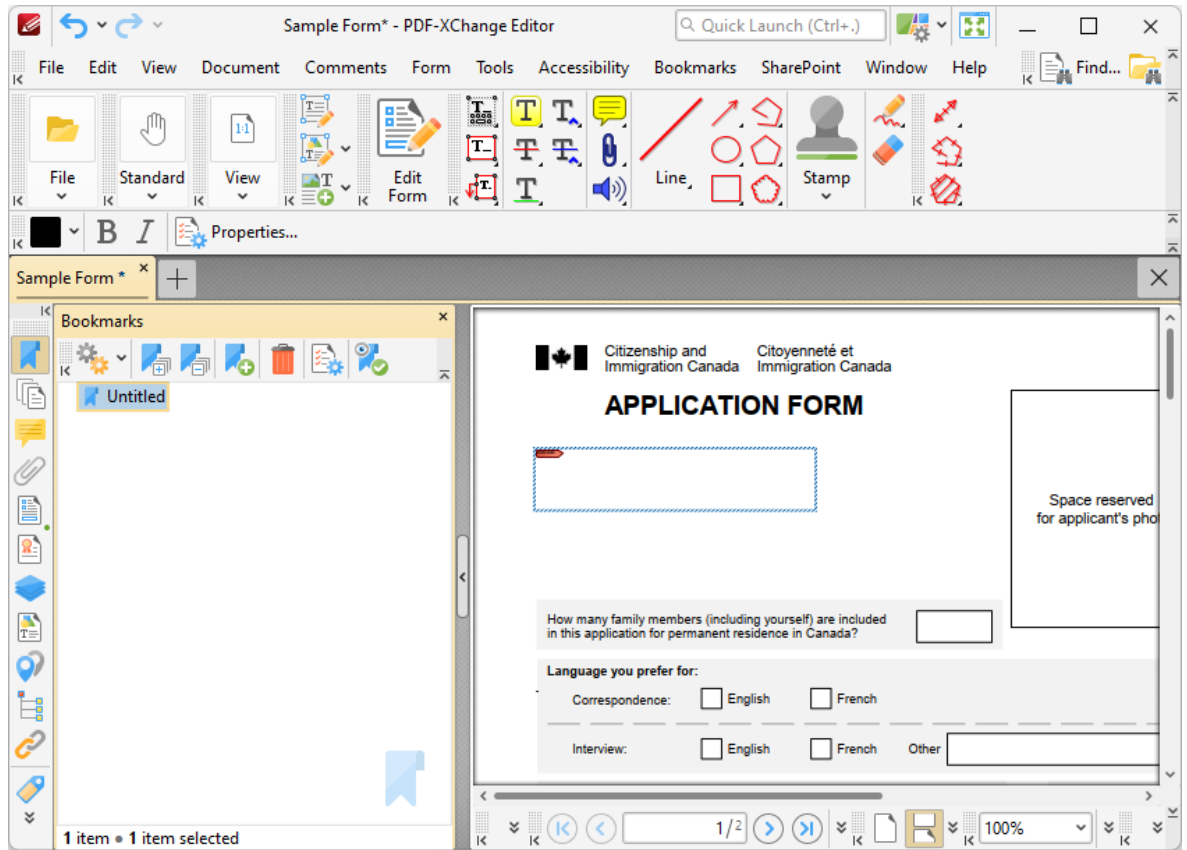
Figure 17. New Bookmark Created

5.3.1.2.8 Add Barcodes to Documents

 Add Barcodes to Documents

Barcodes enable users to encode form data:
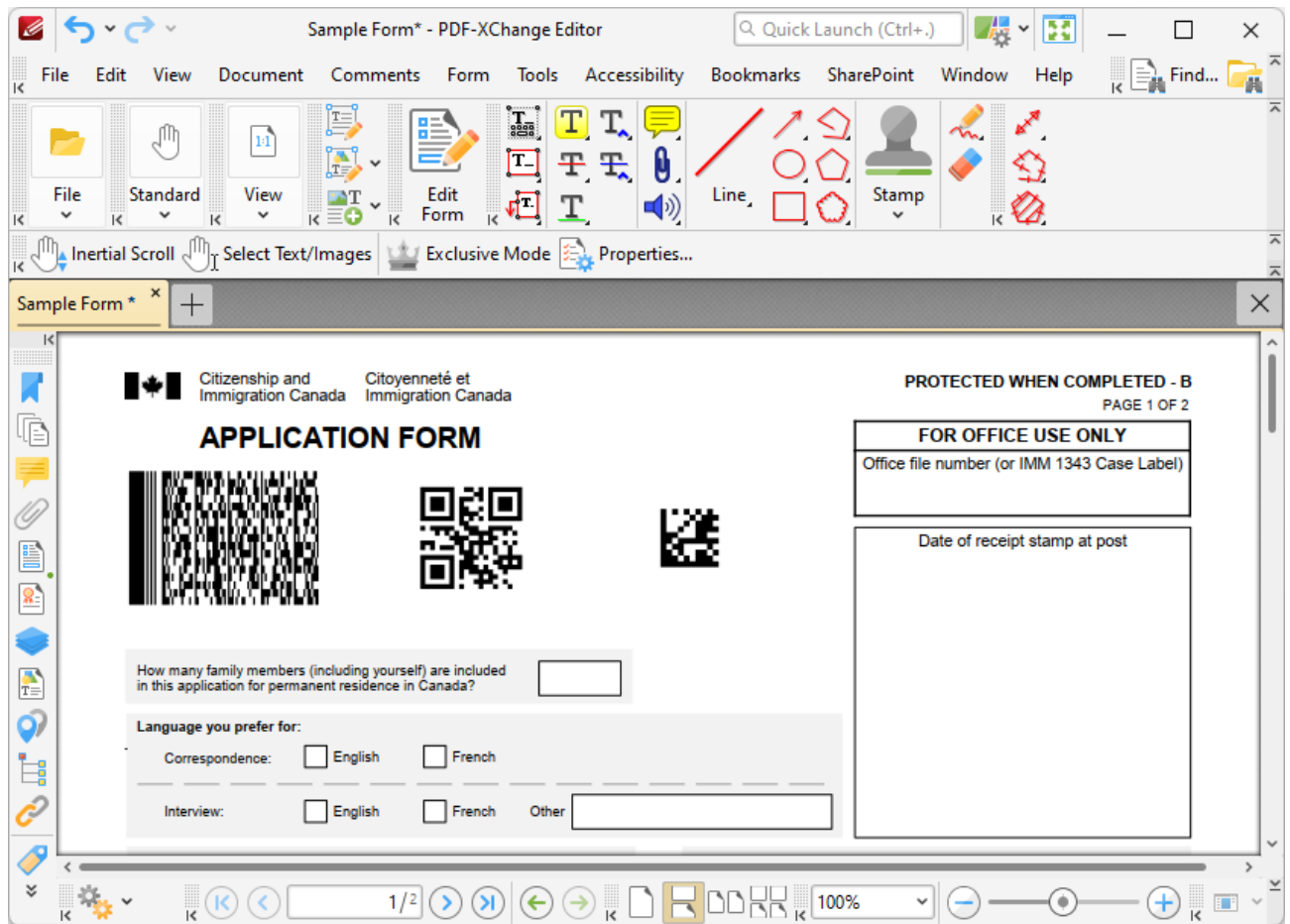
Figure 1. Example Barcodes: PDF417 Barcode (Left), QR Code Barcode (Center), Data Matrix Barcode (Right)

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for barcodes, as detailed below. Click the dropdowns for further information:

▼ **Add Barcodes to Documents**

1. Click **Edit Form,** then click the **Barcode** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the barcode:
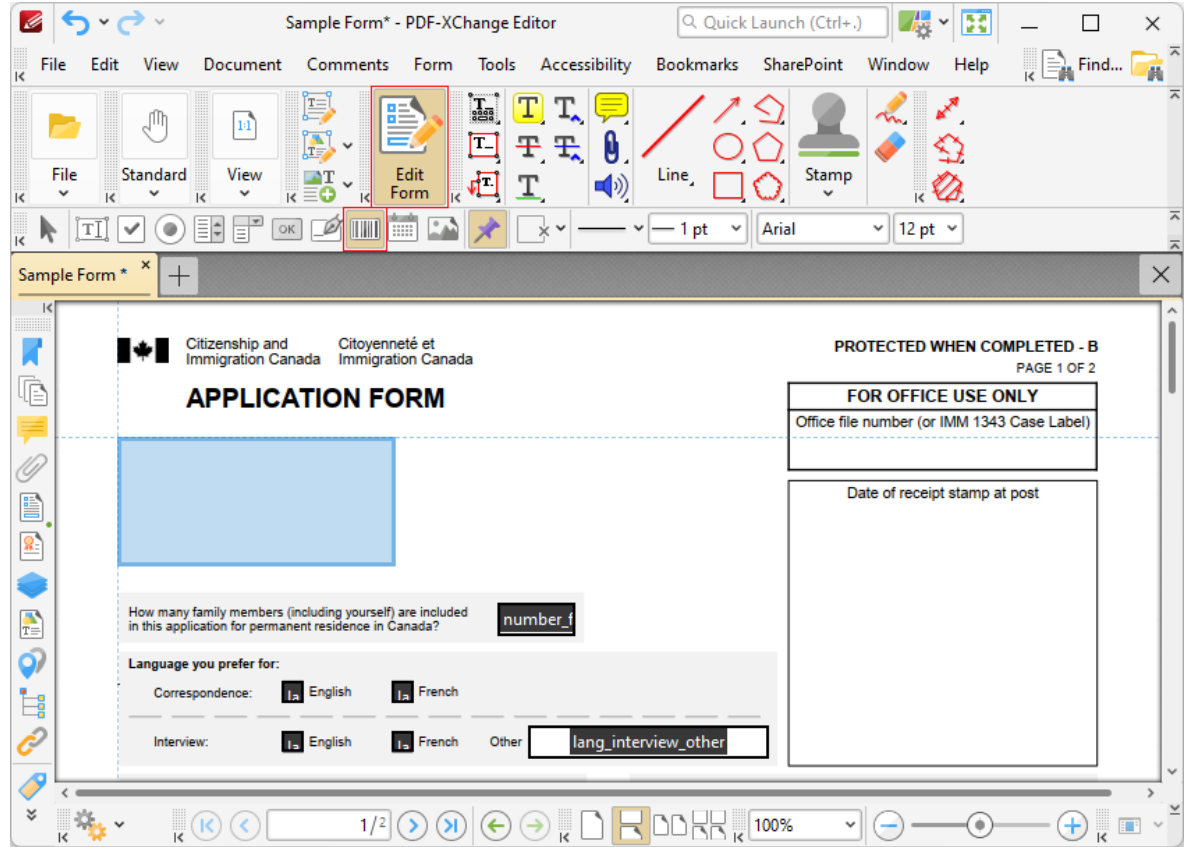
Figure 2. Active Barcode Tool

2. Move the rectangle to the desired location and then click to add the barcode to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of barcodes). Added barcodes appear as detailed below:
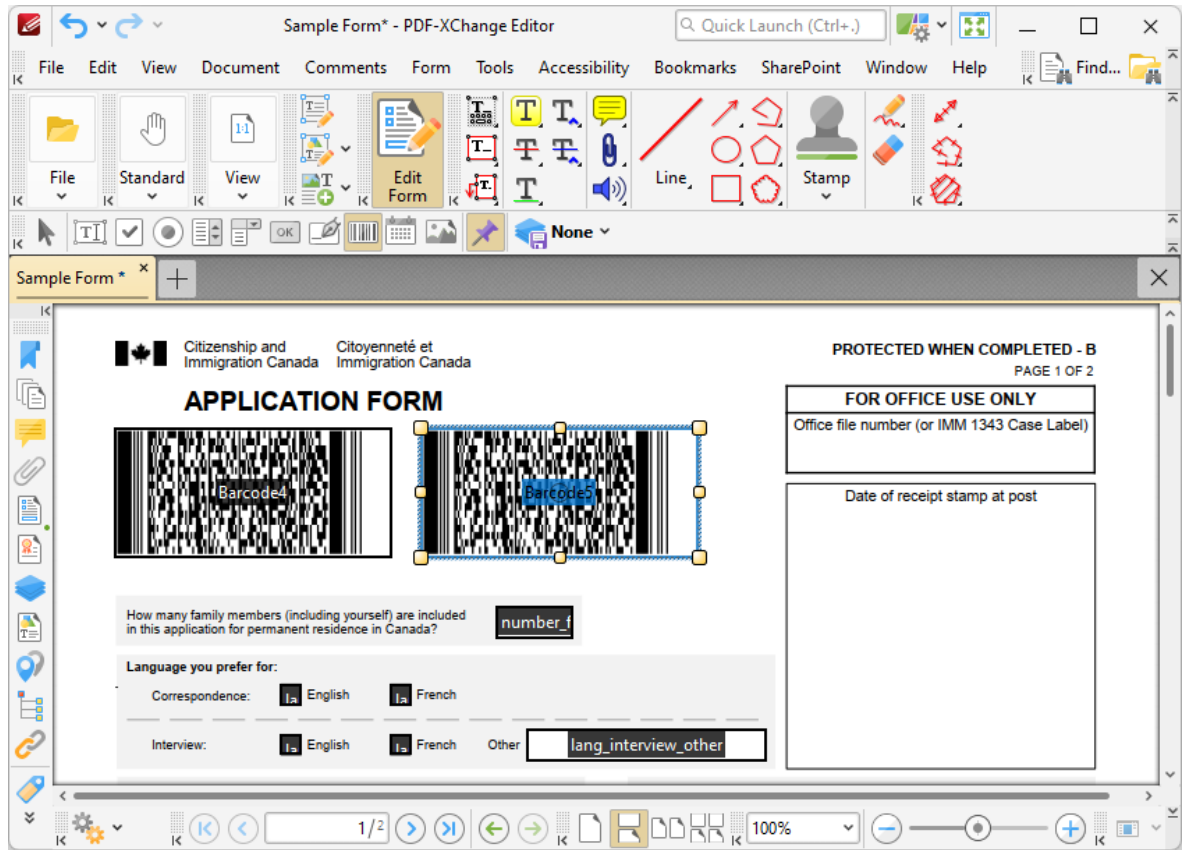
Figure 3. Added Barcodes

- Click and drag the yellow control points to resize barcodes.
- Use the options in the **Properties Toolbar** [485] to determine the style and appearance of barcodes:
  - **Fill Color** determines the color used to fill barcodes.
  - **Stroke Color** determines the border color of barcodes.
  - **Border Style** determines the style of barcode borders.
  - **Border Width** determines the width of barcode borders.
  - **Properties** launches the **Barcode Field Properties** pane, which enables the customization of additional elements of barcodes.

▼ **The Barcode Field Properties Pane**
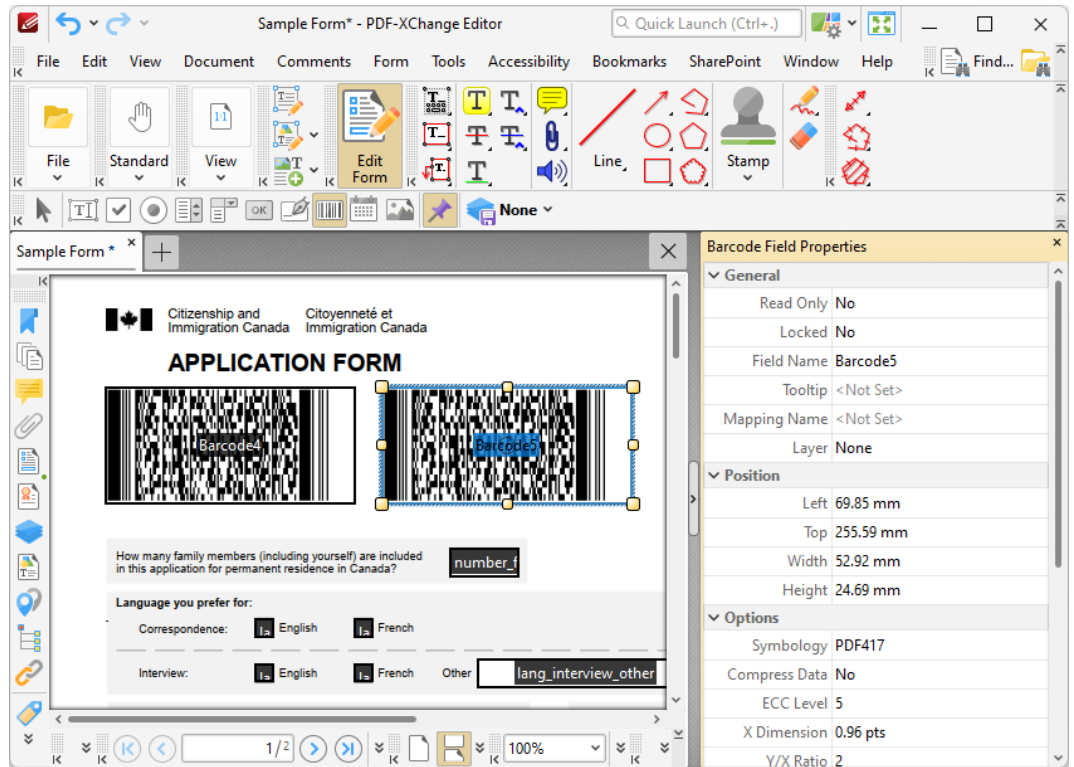
Figure 4. Barcode Tool, Barcode Field Properties Pane

The **Barcode Field Properties** pane can be used to determine a range of style and functionality options for barcodes. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to barcodes, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for barcodes:

The **General** properties determine the general parameters of barcodes:
- **Read Only** determines whether or not the barcode can be edited.
- **Locked** determines whether or not the barcode can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the barcode. This name is present when the **Edit Form** tool is selected, and when barcodes are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer it hovered over the barcode.
- **Mapping Name** determines the mapping name that the barcode uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.
- **Layer** determines the optional content layer to which the barcode belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of barcodes. They are detailed beneath *(figure 3)*.

The **Position** properties determine the position and dimensions of barcodes:
- **Left** determines the distance of the barcode from the left margin.
- **Top** determines the distance of the barcode from the bottom of the page.
- **Width/Height** determine the width/height of the form field that contains the barcode. (The **X Dimension** property, detailed below, determines the size of the barcode itself).

The **Default Text Format** properties determine the default properties when text is entered into the barcode:
- **Font Size** is always set to **auto** for barcodes. This is because the font size refers to the size of the tick when barcodes are selected, and the tick must be proportionate to the size of the barcode.
- **Text Color** determines the color of the tick when barcodes are selected.

The **Options** properties determine additional options for barcodes:
- **Symbology** determines the format of the barcode, as detailed in *(figure 1)*:
  - **PDF417** is a stacked linear barcode used primarily in transport, identification cards and inventory management.
  - **QR Code** is a matrix barcode that features advanced storage capacity in comparison to older barcodes, and is one of the most common barcodes used worldwide.
  - **Data Matrix** is similar to a **QR Code** barcode. **Data Matrices** hold less information that **QR Codes,** but they are more secure.

Additional barcode options are available, depending on the selected barcode format:
- **Compress Data** converts the content of barcodes into a .zip archive when it is enabled. Please note that this is not recommended for mobile scanners, as they are usually incompatible with .zip files.
- **X Dimension** determines the size of the barcode.
- **ECC Level** (Error Correction Capability) determines the level of compensation when barcodes are damaged, for example when printing imperfections occur. A higher ECC level results in a higher degree of data retention in the event of damage, but also requires more space.

Please note that this property is not available for the **Data Matrix** barcode format.
- **Y/X Ratio** sets the ratio of the barcode axes when the **PDF417** barcode format is used.

The **Actions** properties, although displayed in the **Barcode Field Properties** pane, are not compatible with barcodes and should be ignored.

The **Value Calculation** properties determine the physical appearance of the barcode:
- **Calculation Type** determines the type of calculation used to create the barcode:
  - **Custom Script** enables the use of custom JavaScript in order to create the barcode:
    - **Calculation Script** is used to enter custom JavaScript. Click the ellipsis icon to add JavaScript. The **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**
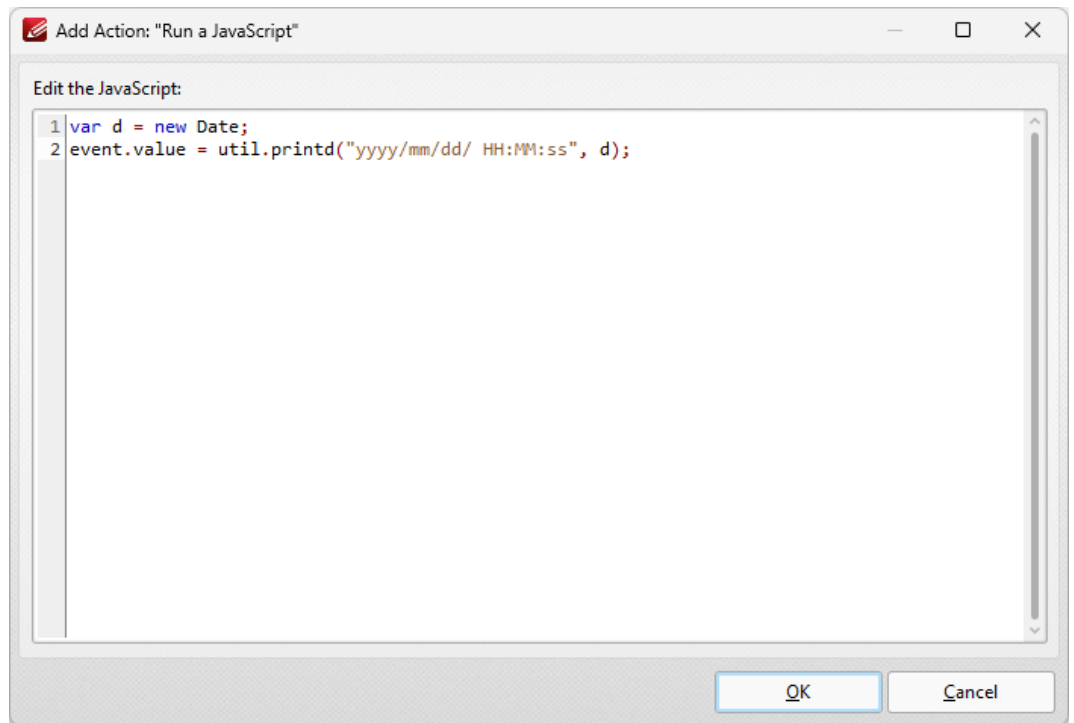
Figure 5. Edit Action: "Run a JavaScript" Dialog Box

- **Reference** is an optional property that has several uses, such as to reference the URL of the published form or other relevant information. Values entered in this property will appear beneath the barcode.

- **Encode Using Tab Delimited Format** encodes fields into the barcode as tab-delimited values. Please note that if the form is configured to output the data in individual **XFDF** or **XDP** files, then this format must be used. Additionally, this format enables the inclusion of the most data and is the best choice in cases where the form data will be copied into a database/spreadsheet.
  - **Fields** is used to determine the fields that create the content of the barcode. This property becomes available when the **Encode Using Tab Delimited Format** option is selected, as detailed in *(figure 6).* Click the ellipsis icon to open the **Field Selection** dialog box, then select the fields to include for the barcode and click **OK:**
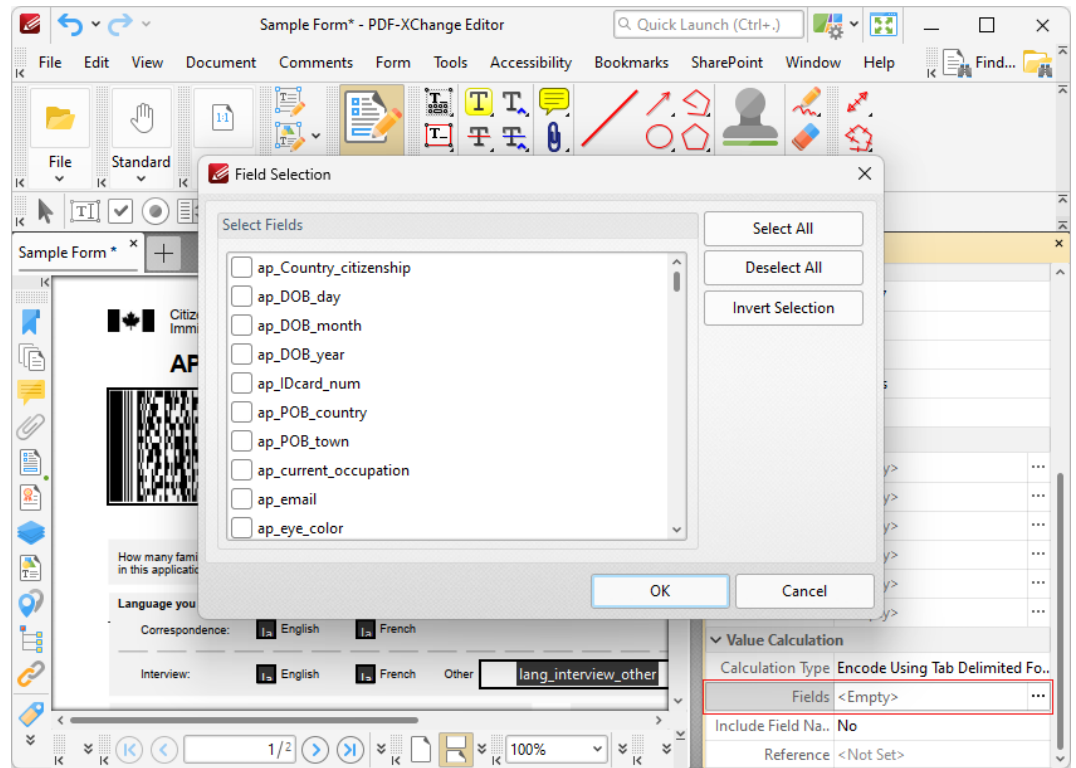
Figure 6. Encode Using Tab Delimited Format, Fields Property Highlighted and Field Selection Dialog Box

- **Include Field Name** determines whether or not the field name is included in the data of the barcode. Please note that if the form is configured to output the data in individual **XFDF** or **XDP** files then the data must be in a tab-delimited format and the field names must be in the first line.
  - **Reference** is an optional property that has several uses, such as to reference the URL of the published form or other relevant

information. Values entered in this property will appear beneath the barcode.

- **Encode Using XML Format** encodes fields into the barcode in standard **XFDF** format.
  - **Fields** is used to determine the fields that create the content of the barcode. This property becomes available when the **Encode Using XML Format** option is selected, as detailed in *(figure 7)*. Click the ellipsis icon to open the **Field Selection** dialog box, then select the fields to include for the barcode and click **OK:**
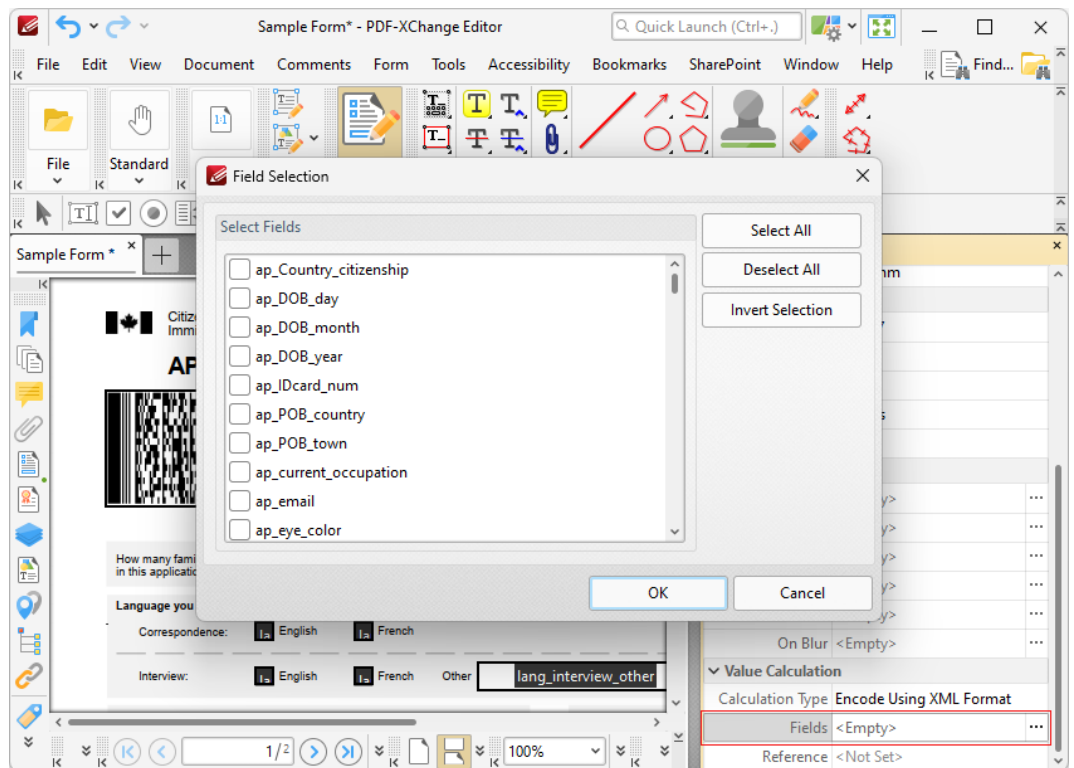
Figure 7. Encode Using XML Format, Fields Property Highlighted and Field Selection Dialog Box

- **Reference** is an optional property that has several uses, such as to reference the URL of the published form or other relevant information. Values entered for this property will appear beneath the barcode.

Barcode Creation Example

The following example will detail the creation of a barcode that represents numerical form data entered elsewhere in the same form:

1. Click **Edit Form,** then click the **Barcode** icon in the **Form Toolbar** (these locations are highlighted in the image below). The blue rectangle that represents the barcode will be displayed:
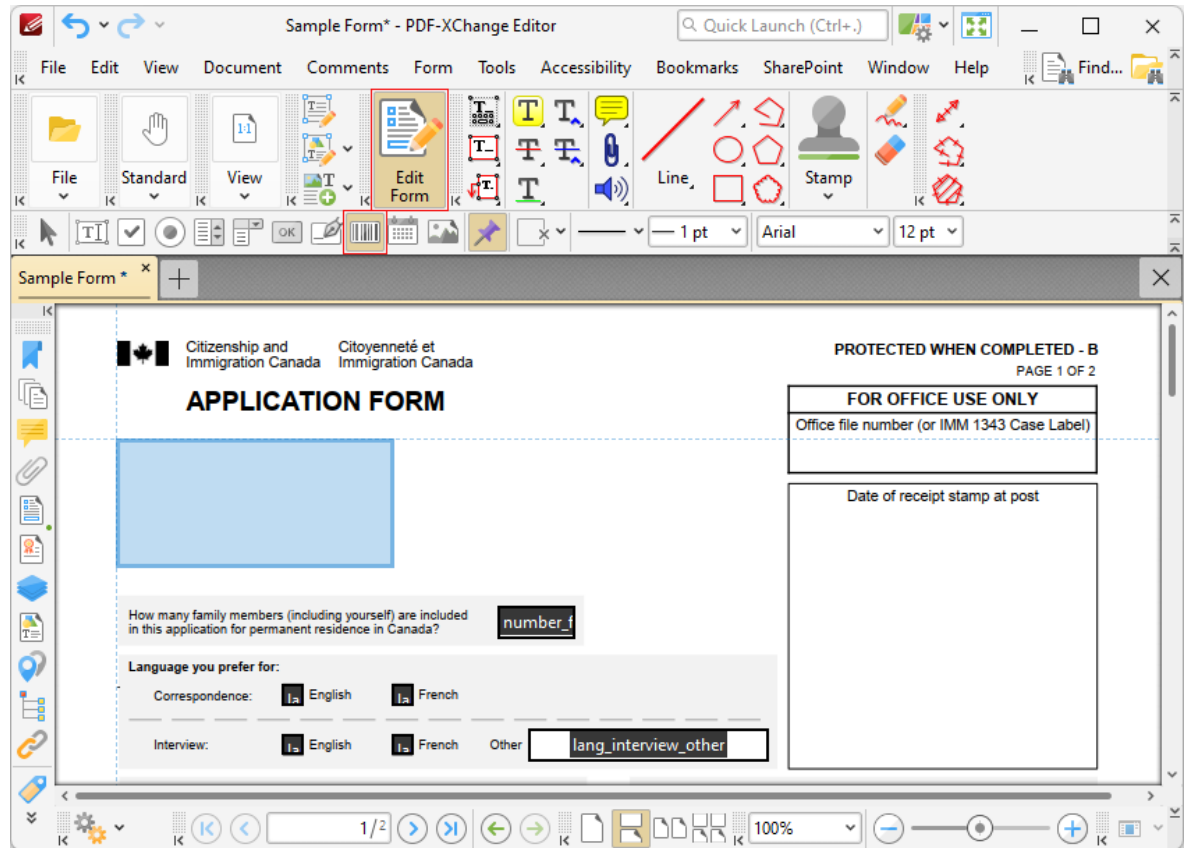
Figure 8. Active Barcode Tool

2. Click to add the barcode, then right-click it and click **Properties** to open the **Barcode Field Properties** pane:
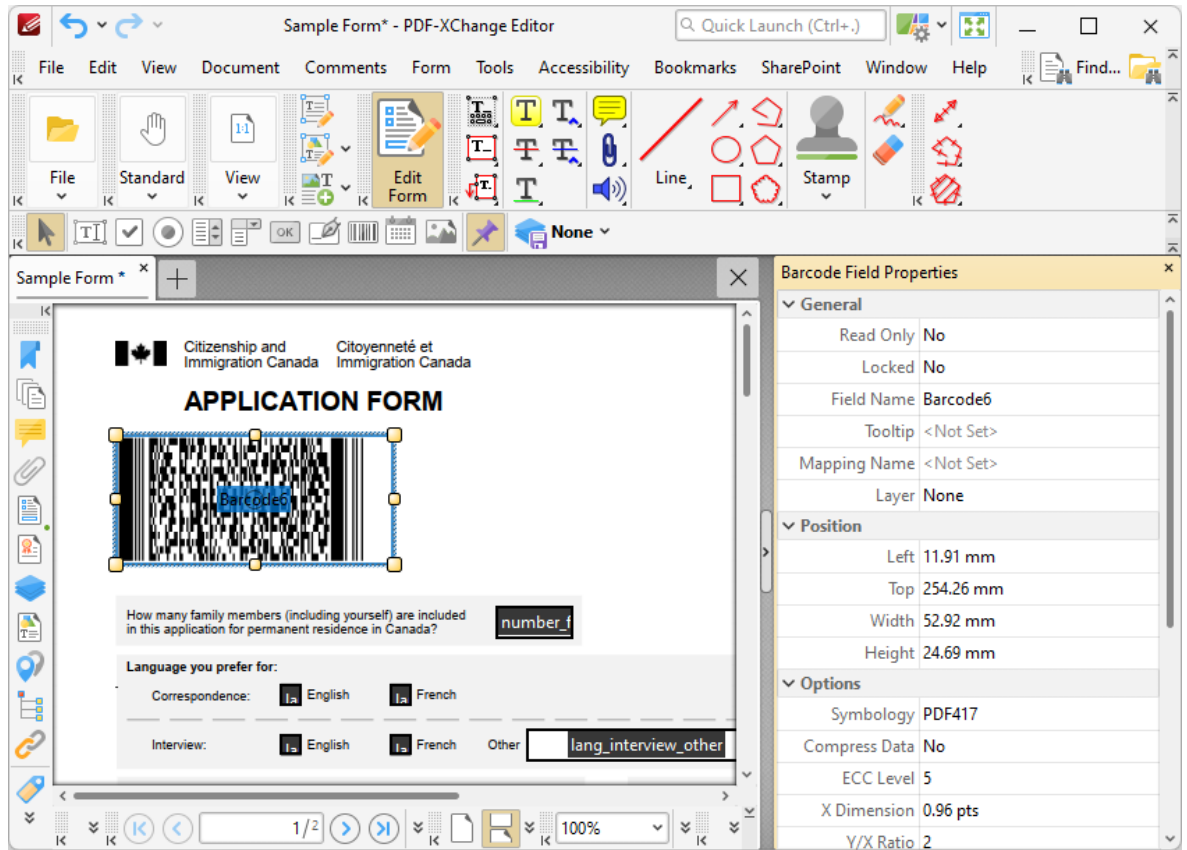
Figure 9. Active Barcode Tool, Barcode Field Properties Pane

3. Scroll down the **Barcode Field Properties** pane to the **Calculation Type** property, then select **Encode Using Tab Delimited Format:**
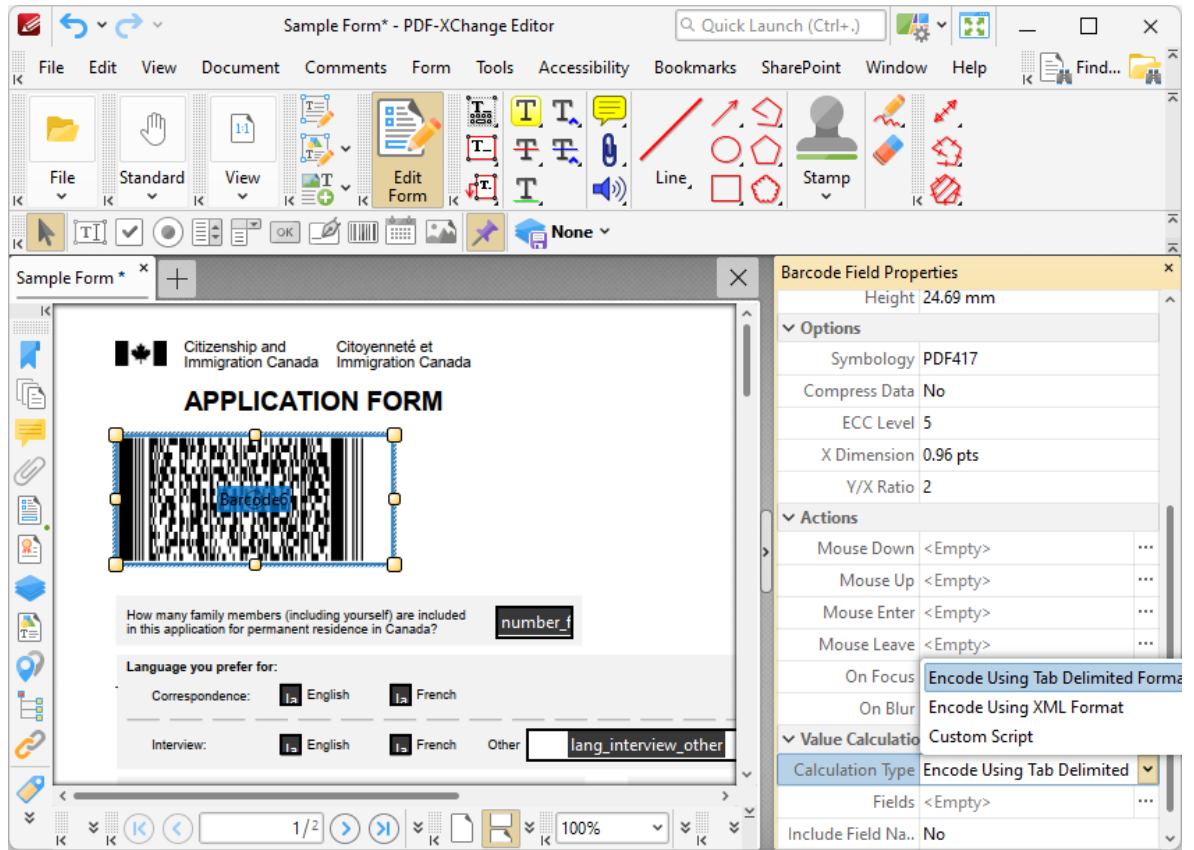
Figure 10. Calculation Type Property, Encode Using Tab Delimited Format

The next step is to create the form fields from which the barcode will take its data:

4. Click **Text Field** and **Keep Mode** (highlighted in the image below) in the **Form Toolbar,** then click to add some text fields to the document:
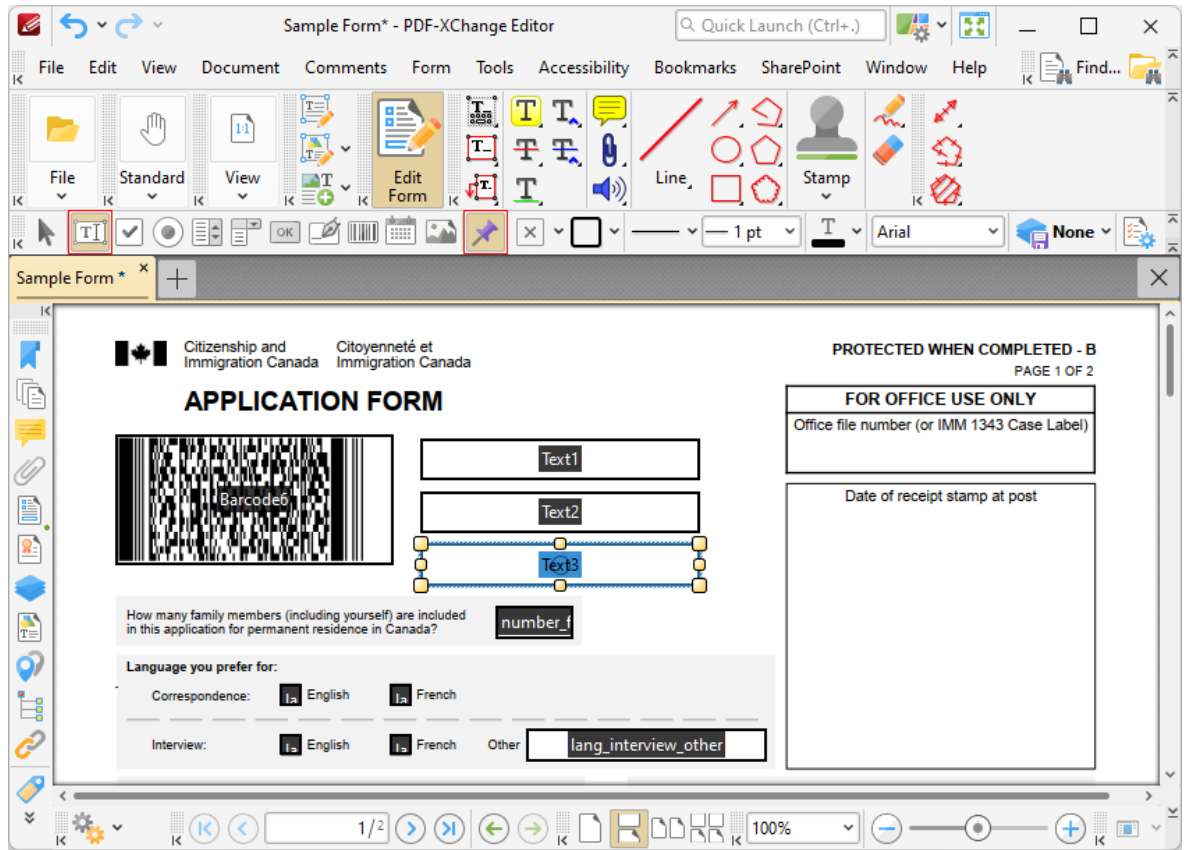
Figure 11. New Text Boxes

5. Click **Standard** (highlighted in the image below) and select the **Hand Tool,** then click to select the text fields one at a time and enter some numerical data:
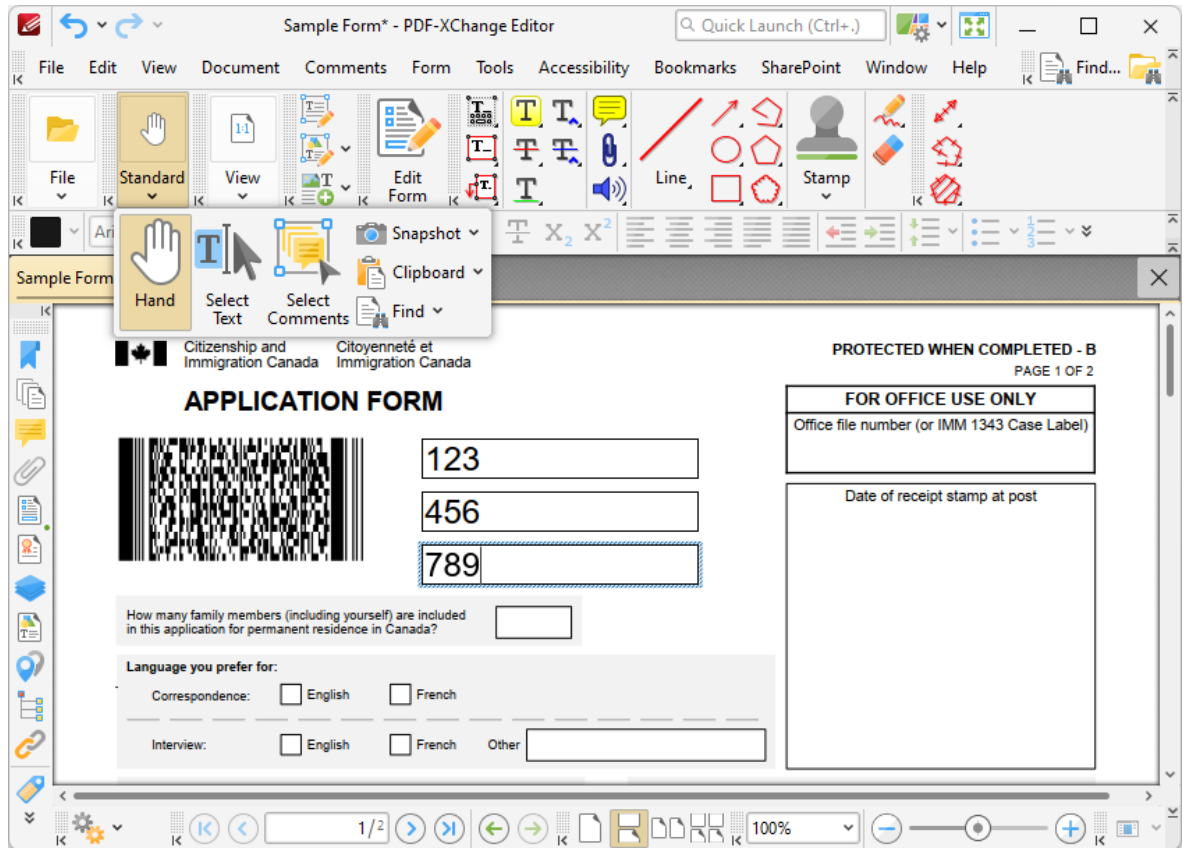
Figure 12. Active Hand Tool

6. Click **Edit Form,** then click **Select Fields** in the **Form Toolbar,** (these locations are highlighted in the image below) right-click the barcode and click **Properties** to open the **Properties** pane:
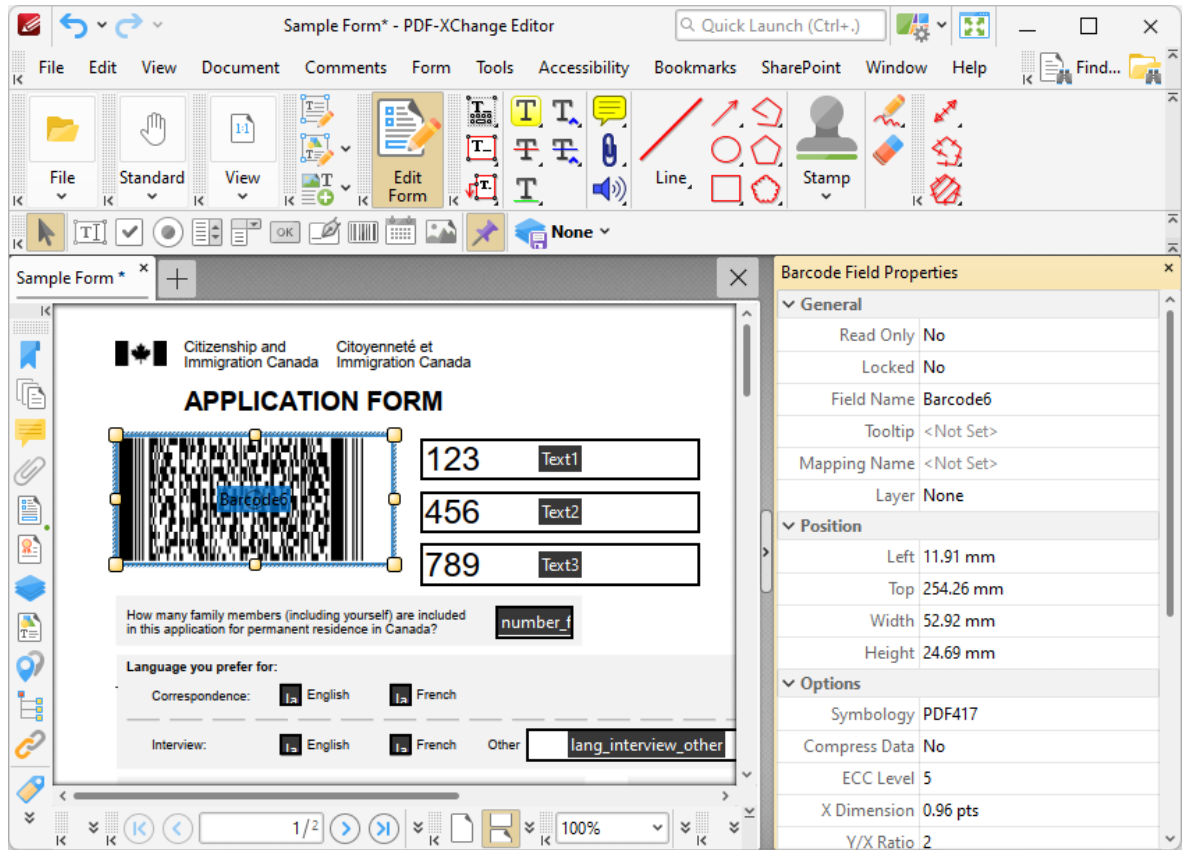
Figure 13. Selected Barcode

7. Scroll down the **Barcode Field Properties** pane to the **Fields** property (highlighted in the image below) and click the ellipsis icon. The **Field Selection** dialog box will open. Note that the text fields entered at step four each feature a corresponding check box. Select the boxes of the forms to be included in the creation of the barcode and click **OK:**
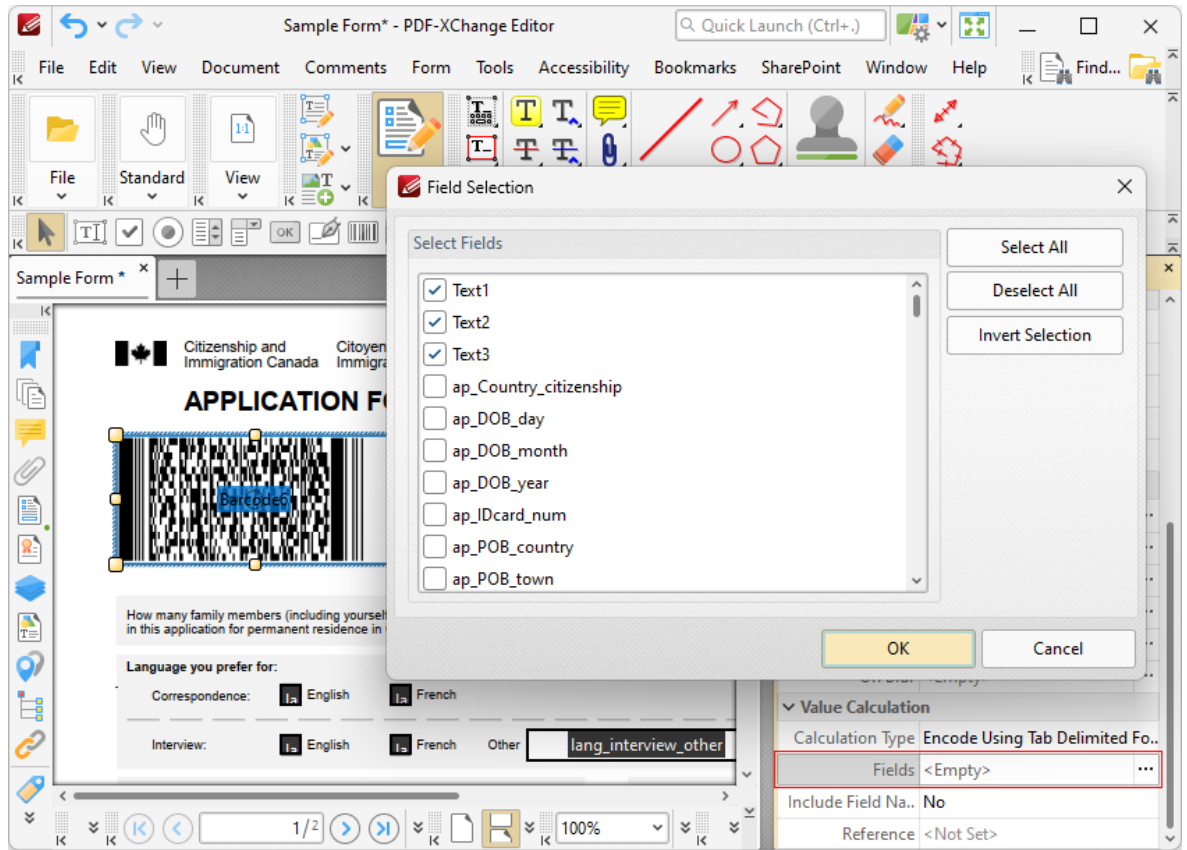
Figure 14. Selected Barcode and Field Selection Dialog Box

The barcode will update to represent the information:
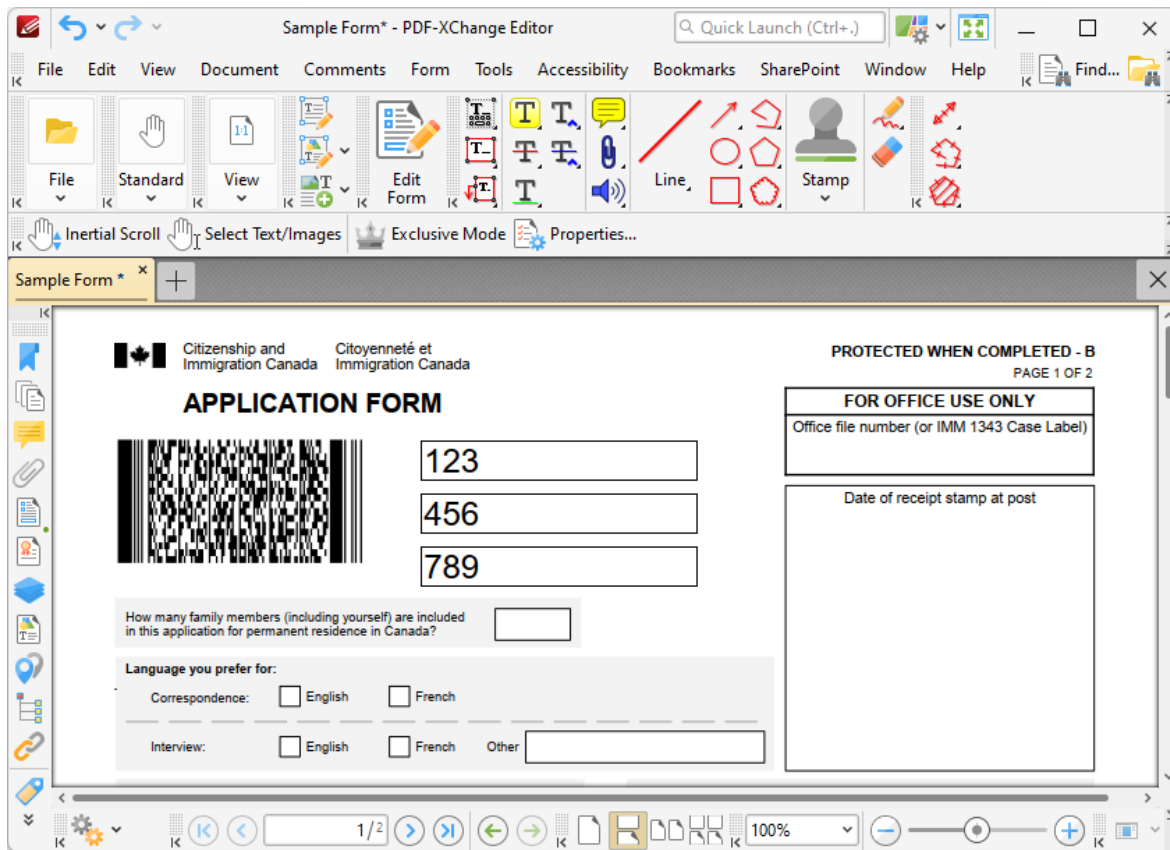
Figure 15. Updated Barcode

If the content of the text fields used to create the barcode is updated then the barcode will update to represent the new information.

5.3.1.2.9 Add Date Fields to Documents

Add Date Fields to Documents

Date fields are used to add an interactive calendar to documents in order to specify dates:
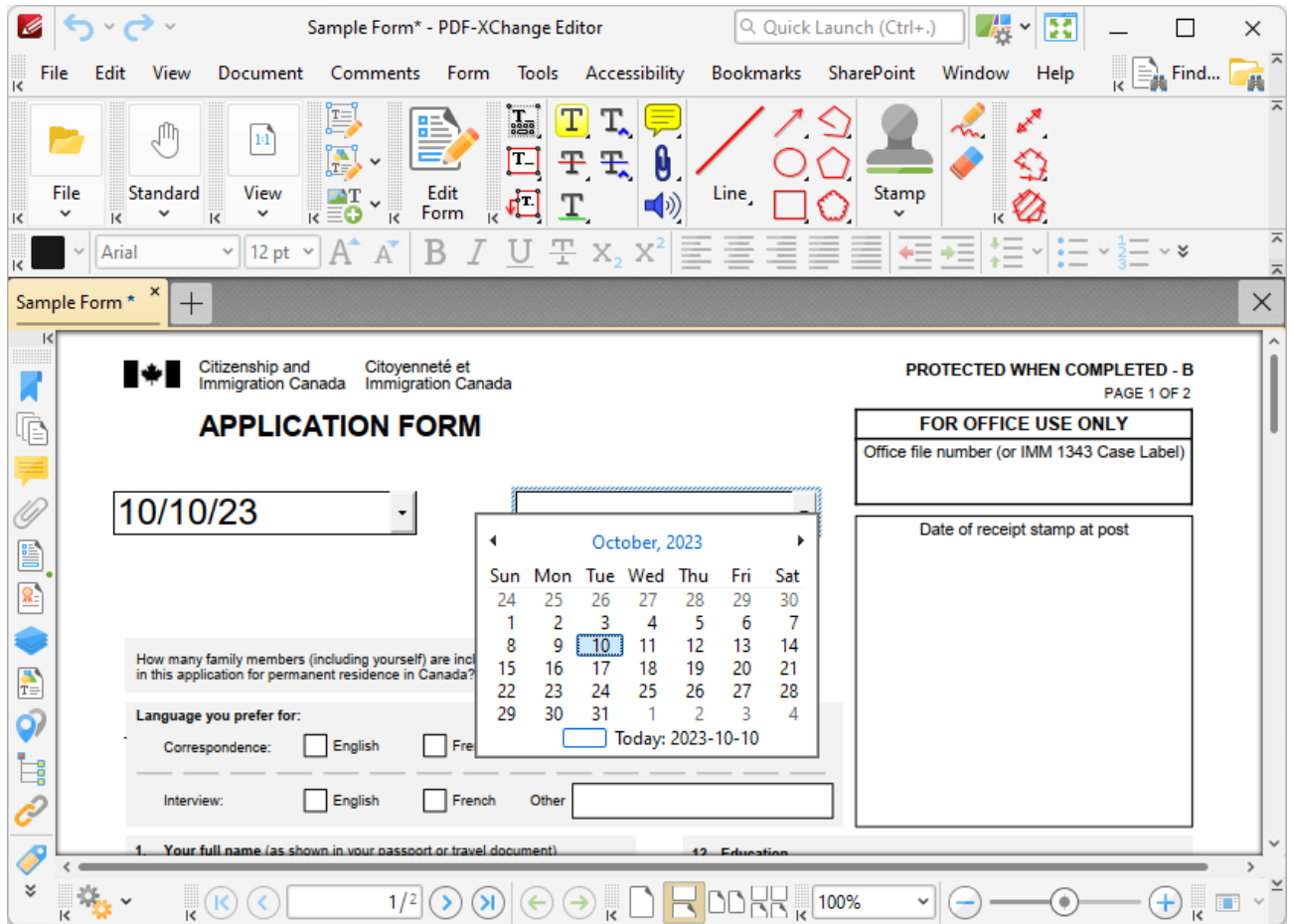
Figure 1. Example Date Fields

Please note that date fields are a modified version of the text fields detailed **here.** 326 The only difference is that the **Category** property in the **Format Value** tab of the **Properties** pane is set to **Date** by default for convenience of use. This means that some properties and functions available by default for text fields are disabled by default for date fields. These can be edited using the **Properties** pane detailed below.

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for date fields. Click the dropdowns below for further information:

▼ **Add Date Fields to Documents**

1. Click **Edit Form,** then click the **Date Field** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the date field:
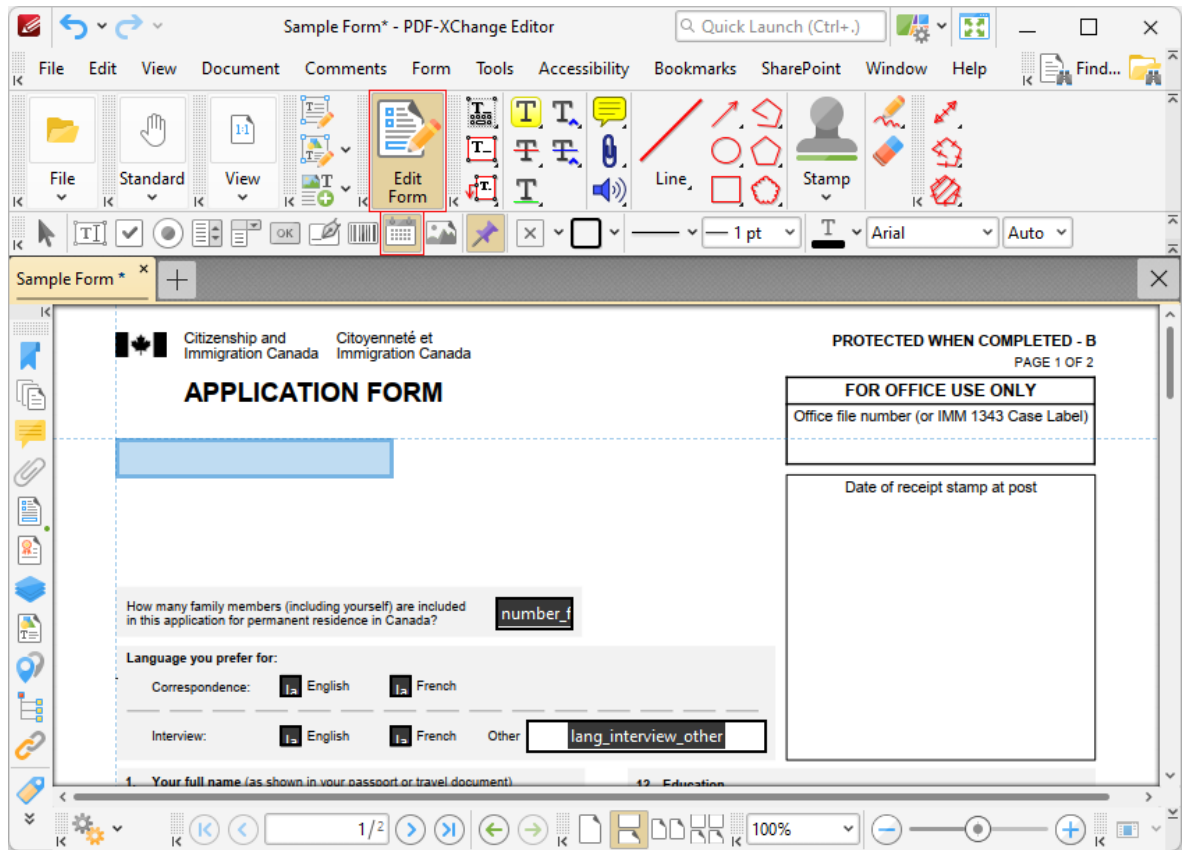
Figure 2. Active Date Field Tool

2. Move the rectangle to the desired location and then click to add the date field to the document. Added date fields appear as detailed below:
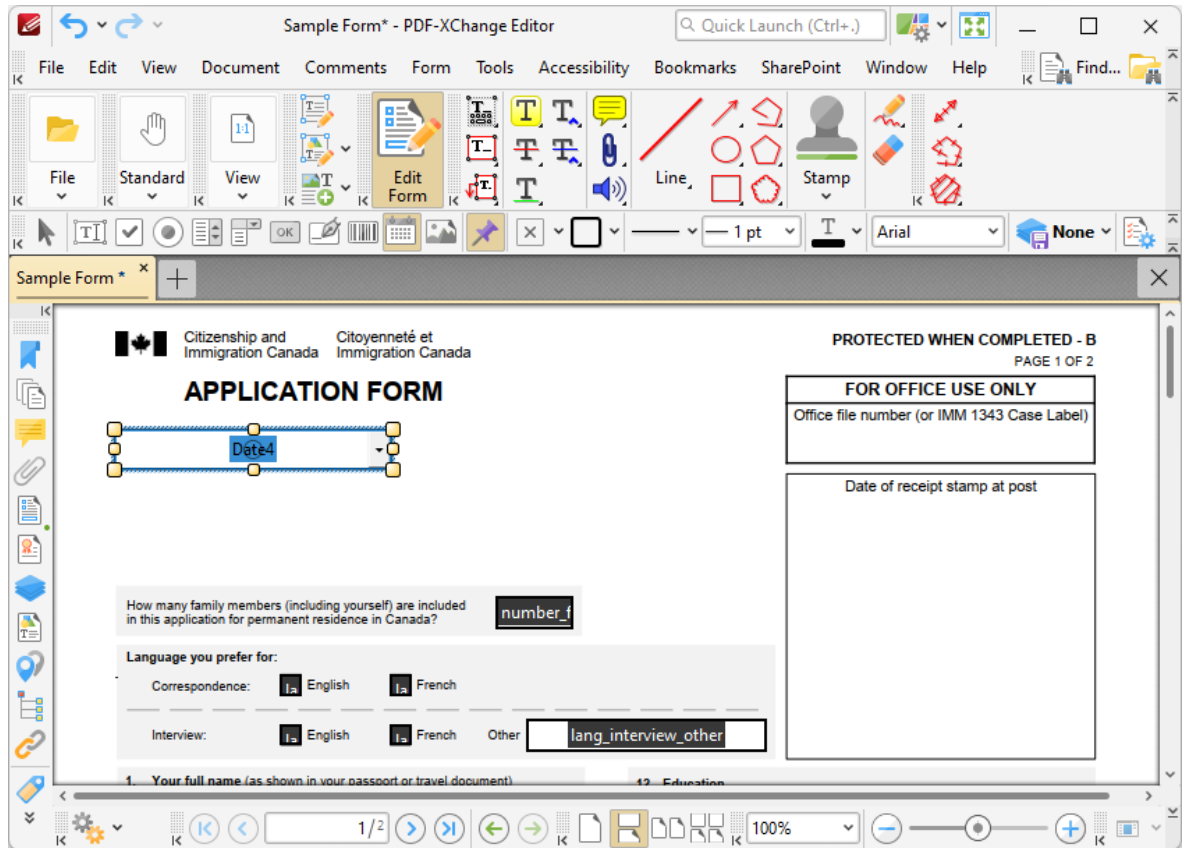
Figure 3. Added Date Field

- Click and drag the yellow control points to resize date fields.
- Use the options in the **Properties Toolbar** 485 to determine the style and appearance of date fields:
    - **Fill Color** determines the color used to fill date fields.
    - **Stroke Color** determines the border color of date fields.
    - **Border Style** determines the style of date field borders.
    - **Border Width** determines the width of date field borders.
    - **Text Color** determines the color of text entered in date fields.
    - **Font** determines the font of text entered in date fields.
    - **Properties** launches the **Text Field Properties** pane, which enables the customization of additional elements of date fields.

▼ **The Text Field Properties Pane**
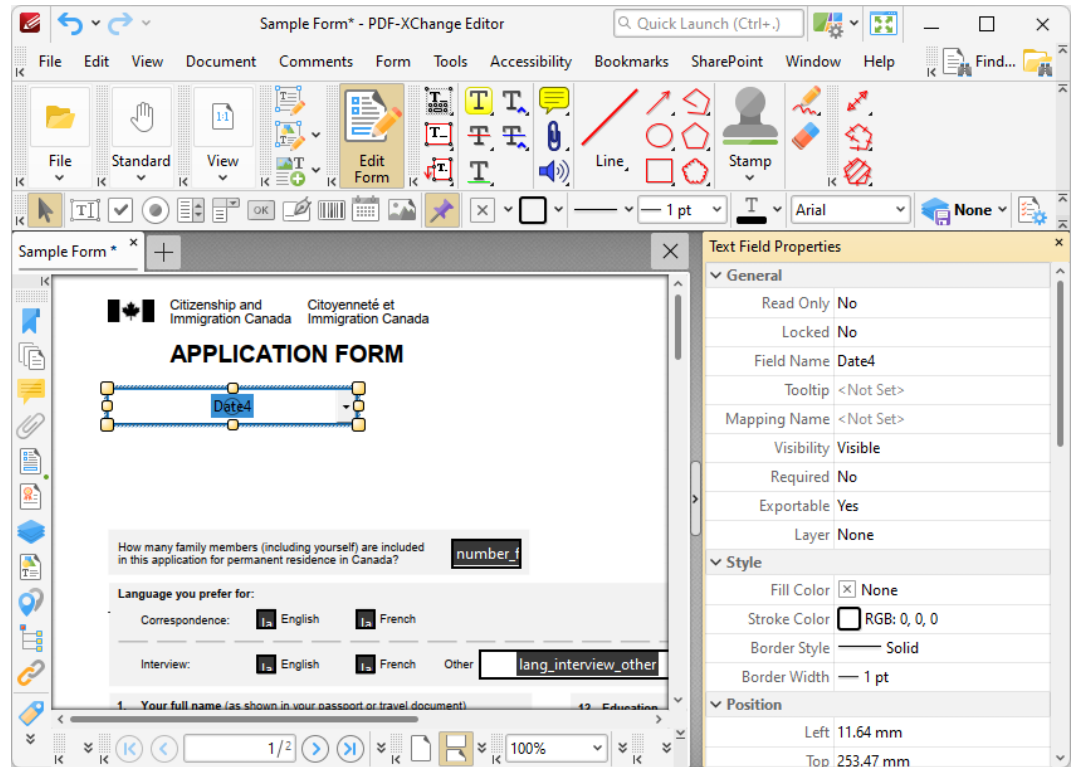
Figure 4. Date Field Tool, Text Field Properties Pane

The **Text Field Properties** pane can be used to determine a range of style and functionality options for date fields. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to date fields, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available in the **Date Field Properties** pane:

The **General** properties determine the general parameters of date fields:
- **Read Only** determines whether or not the date field can be edited.
- **Locked** determines whether or not the date field can be moved, and whether or not its properties can be modified.
- **Field Name** determines the name of the date field. This name is present when the **Select Fields** tool is enabled, and when date fields are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer is hovered over the date field.
- **Mapping Name** determines the mapping name that the date field uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of text entered in the date field.
- **Visibility** determines the visibility of the date field.
- **Required** determines whether or not the date field is a required field. Required fields must be filled before documents that contain them can be submitted.
- **Exportable** determines whether or not the date field data can be exported from the form.
- **Layer** determines the optional content layer to which the date field belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of date fields. They are detailed beneath *(figure 3).*

The **Position** properties determine the position and dimensions of date fields:
- **Left** determines the distance of the date field from the left margin.
- **Top** determines the distance of the date field from the bottom of the page.
- **Width/Height** determine the width/height of the date field.

The **Default Text Format** properties determine the default properties when text is entered into the date field:
- **Font** determines the font used.
- **Font Size** determines the size of the font.
- **Text Color** determines the color of the font.

The **Options** properties determine additional options for date fields:
- **Alignment** determines the text alignment within the date field.
- **Default Value** determines the default value of the date field. Date fields will show this value by default. If they are edited and then reset then the value entered for this property will be displayed.
- **File Select** determines whether or not files on the local computer are selected when their filename is entered in the date field. If set to **Yes** then the file contents are submitted as the value of the date field when the form is submitted.
- The **Password** property is not applicable to date fields.
- The **Check Spelling** property is not applicable to date fields.
- The **Multi Line** property is not applicable to date fields.
- The **Scroll** property is not applicable to date fields.
- **Allow Rich Text** determines whether or not the date field permits rich text such as bold and italics.

- The **Comb** property is not applicable to date fields.
- **Character Limit** determines the maximum number of characters permitted in the date field.

The **Actions** properties determine the action taken when users interact with the date field:

- **Mouse Down** initiates an action when the left mouse button is pressed (without being released) on the date field.
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released) on the date field.
- **Mouse Enter** initiates an action when the pointer moves into the date field.
- **Mouse Leave** initiates an action when the pointer moves out of the date field.
- **On Focus** initiates an action when the date field is selected.
- **On Blur** initiates an action when the date field is deselected.
- Click the ellipsis icon on the right of actions to add/edit date field actions:
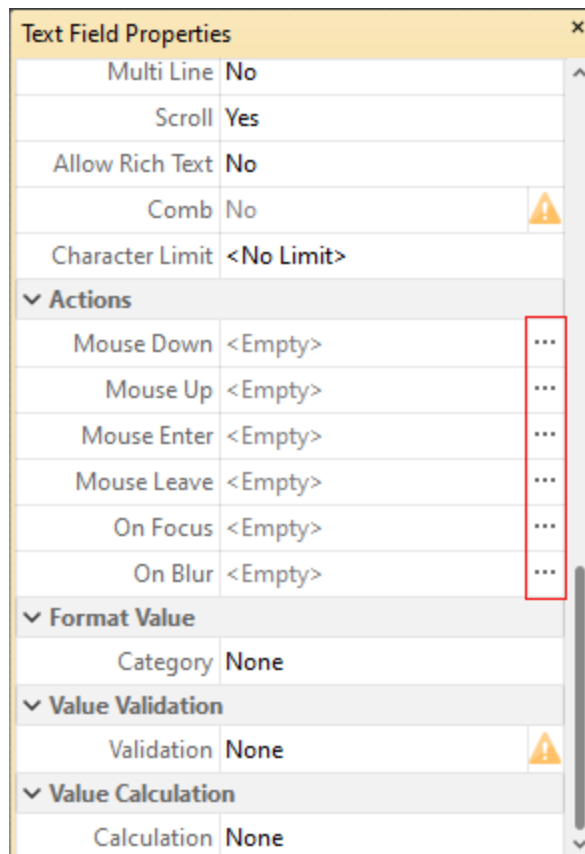
Figure 5. Date Field Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 991

The **Format Value** properties determine the type of information permitted to be entered in the date field and the format in which it should be entered. Date fields are set to **Date** by default.

- **Category** determines the category of the field. Each category has different options, as detailed below:
  - **None** determines that there is no category for the field.
  - **Number** sets the field input to numerical values. The following options are available for this property:
    - **Decimal Places** determines the number of decimal places displayed.
    - **Separator Style** determines the separators used for numbers.
    - **Currency Symbol** determines the currency symbol used in the date field.
    - **Symbol Location** determines 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** determines how numbers with negative values are displayed.
  - **Percentage** sets the field input to percentage values. The following options are available for this property:
    - **Decimal Places** determines the number of decimal places permitted.
    - **Separator Style** determines the separator used for numbers.
  - **Date** is the default setting and sets the field input to date values, then adds a dropdown calendar to the date field. Use the **Date Format** parameter to determine the format of dates.
  - **Time** sets the field input to time values (hours and minutes). Use the **Time Format** parameters to determine the format of time values.
  - **Special** sets the field input values to one of the special options. Use the **Special Format** parameter to determine the format. The options are:
    - **ZIP Code**
    - **ZIP Code +4,** which is used for nine-digit postal codes.
    - **Phone Number**
    - **Social Security Number**
  - **Custom Action** adds custom JavaScript actions to date fields. There are two options:
    - **Format Action** is used to enable custom JavaScript for formats. Click the ellipsis icon to add/view JavaScript.
    - **Keystroke Action** is used to enable custom JavaScript for keystrokes. Click the ellipsis icon to add/view JavaScript.

- If the options above are used then the **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**
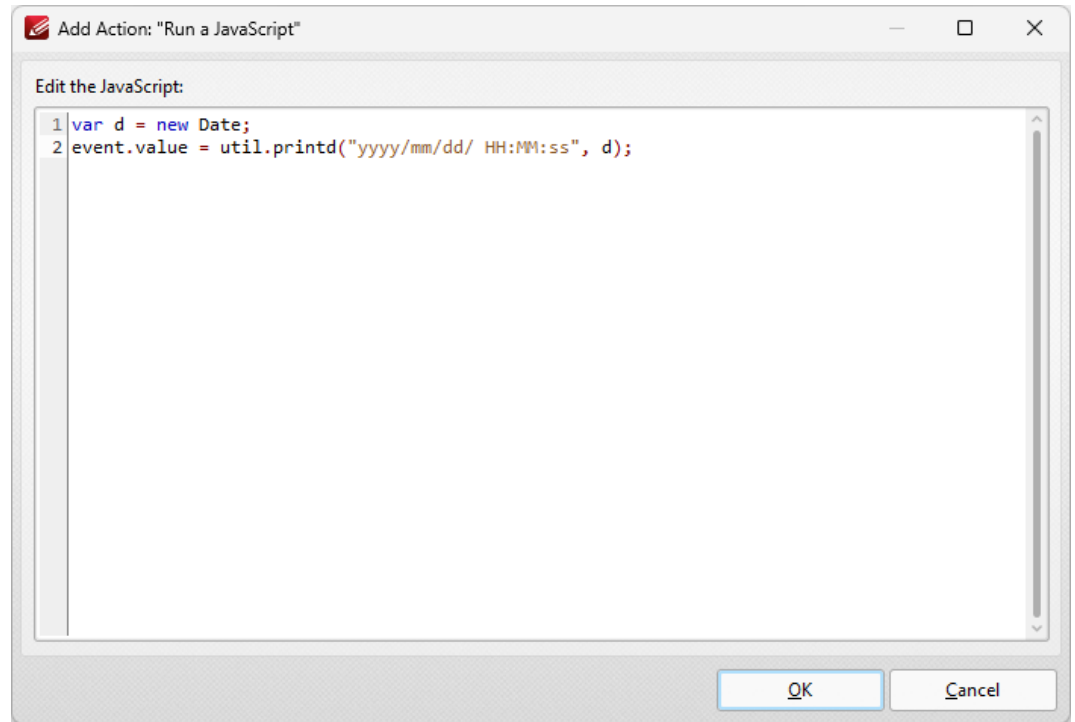
Figure 6. Edit Action: "Run a JavaScript" Dialog Box

The **Value Validation** properties determine the validation of values entered into the date field. These properties can be used to ensure that the information entered into forms fits within specific parameters:

- **Validation** determines how values are validated:
  - **Value in Range** sets the range within which values entered into the date field must fall:
    - **From** specifies the minimum value.
    - **To** specifies the maximum value.
  - **Custom Action** enables the use of custom JavaScript in order to validate values entered in the date field:
    - **Validation Action** specifies the JavaScript to use, as detailed in *(figure 6).*

The **Value Calculation** properties determine the value of date fields from other date fields, and are used in forms where entered form data creates the value of further forms, such as when several orders are placed that combine to give a total cost. The available properties are detailed below:

- **None** specifies that calculations are not performed.
- **Sum** uses the sum of specified fields.

- **Product** uses the product of specified fields.
- **Average** uses the average of specified fields.
- **Minimum** uses the minimum value of all the specified fields.
- **Maximum** uses the maximum value of all specified fields.
- Please note that when the **Sum, Product, Average, Minimum** and **Maximum** properties are used, the additional entry **"Fields"** will appear beneath the **Calculation** property. Use this entry to specify the fields used in these calculations.
- **Simplified Notation** enables the insertion of a custom calculation to be performed on fields. Use the **Simple Notation** box to determine the calculation. Use the document field names and standard mathematical notation (+, -, *, /) to specify the calculation. If there are spaces in form field names then they must be entered in quotation marks. For example: **Field1 + Field 2 / "Division Field" * 64.**
- **Custom Action** enables the use of custom JavaScript in order to perform calculations and determine the order in which calculations are performed. Click the ellipsis icon to add custom JavaScript, as detailed in *(figure 6).*

Examples of **Value Validation** and **Value Calculation** are available **here.** ₃₃₅

5.3.1.2.10 Add Image Fields to Documents

Add Image Fields to Documents

Image fields are used to add form fields that enable the submission of images as form data:
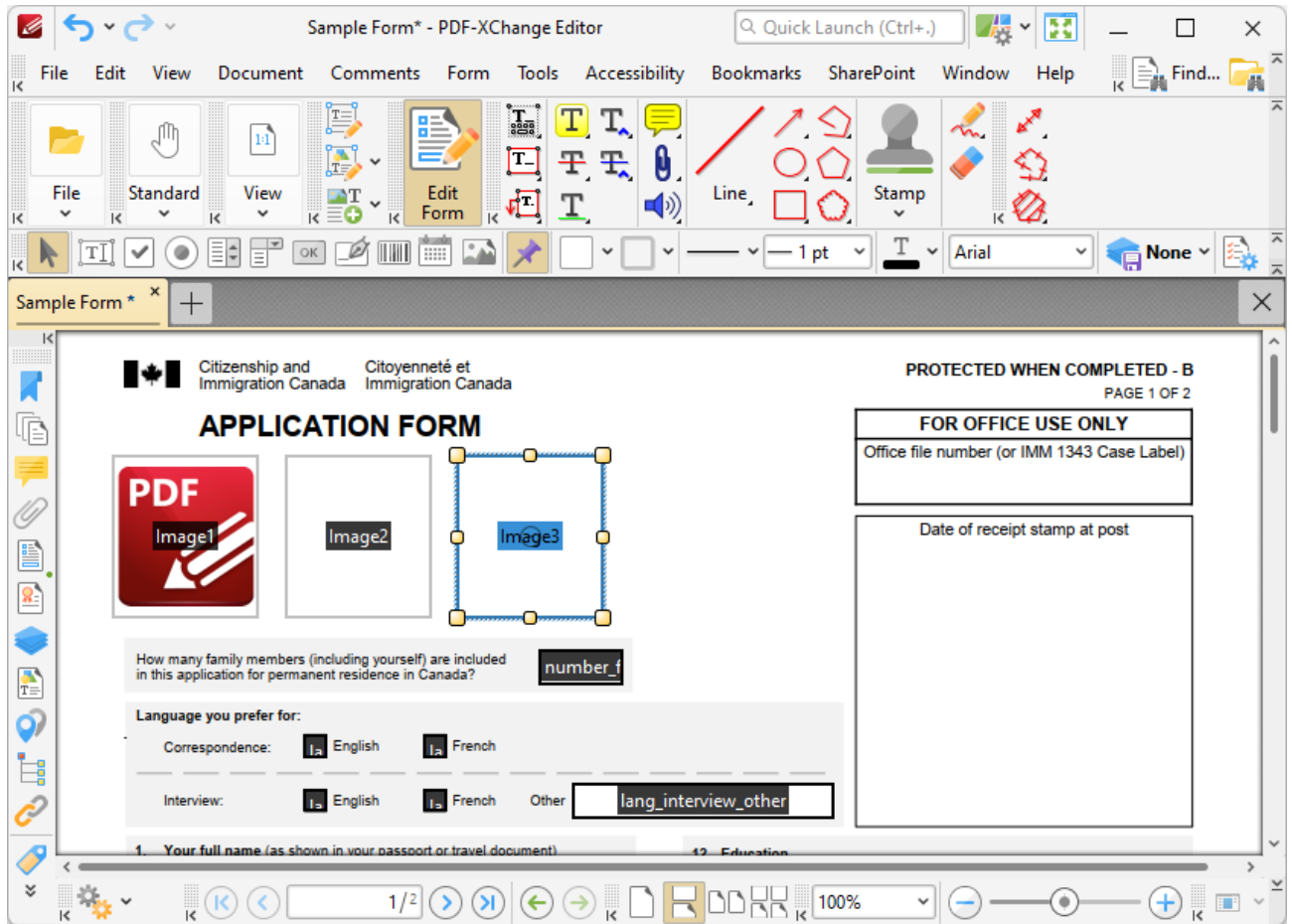
Figure 1. Example Image Fields: Image Added (left), Empty Field (center), Selected Empty Field (right)

Please note that image fields are a modified version of the button fields detailed **here.** [407] The only difference is that the **Layout** property in the **Options** tab of the **Properties** pane is set to **Icon Only** by default for convenience of use. All properties can be edited using the **Properties** pane detailed below.

The functionality of **PDF-XChange Editor** enables a wide range of dynamic customization for image fields. Click the dropdowns below for further information:

▼ **Add Image Fields to Documents**

1. Click **Edit Form,** then click the **Image** icon in the **Form Toolbar** (these locations are highlighted in the image below). A blue rectangle will be displayed at the location of the pointer. This rectangle represents the image field:
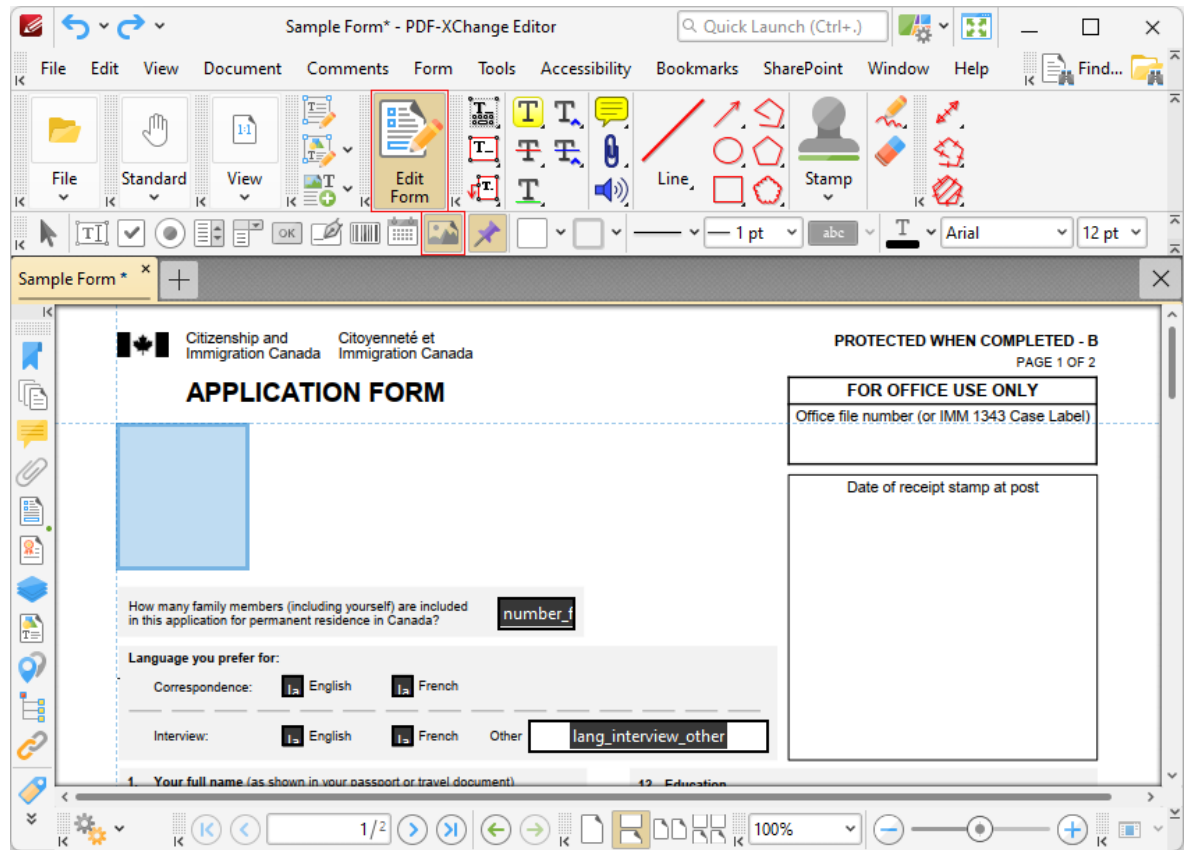
Figure 2. Active Image Field Tool

2. Move the rectangle to the desired location and then click to add the image field to the document. (Use the editing aids detailed **here** 610 to assist in the precise placement of image fields). Added image fields appear as detailed below:
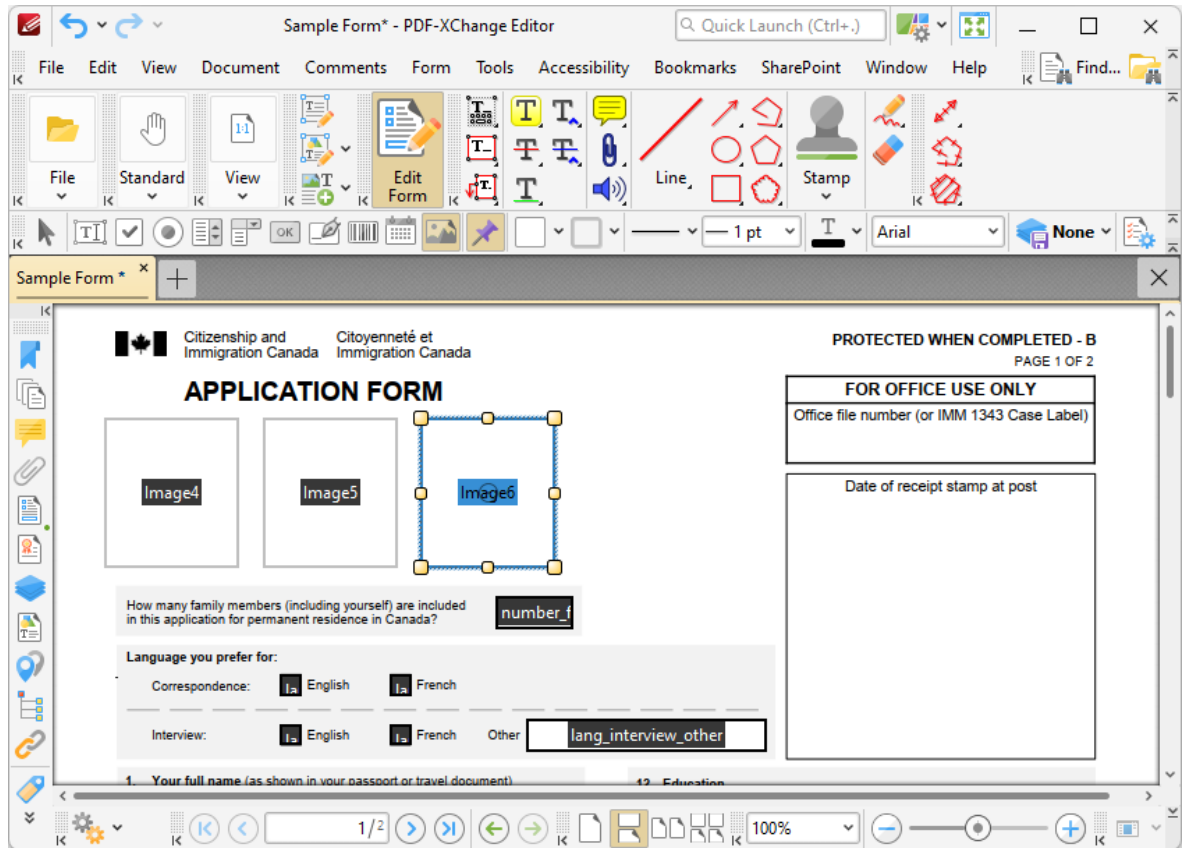
Figure 3. Added Image Fields

- Click and drag the yellow control points to resize image fields.
- Use the options in the **Properties Toolbar** 485 to determine the style and appearance of image fields:
    - **Fill Color** determines the color used to fill image fields.
    - **Stroke Color** determines the border color of image fields.
    - **Border Style** determines the style of image field borders.
    - **Border Width** determines the width of image field borders.
    - **Text Color** determines the color of text in image fields.
    - **Font** determines the font of text in image fields.
    - **Properties** launches the **Push Button Properties** pane, which enables the customization of additional elements of image fields.

▼ **The Push Button Properties Pane**
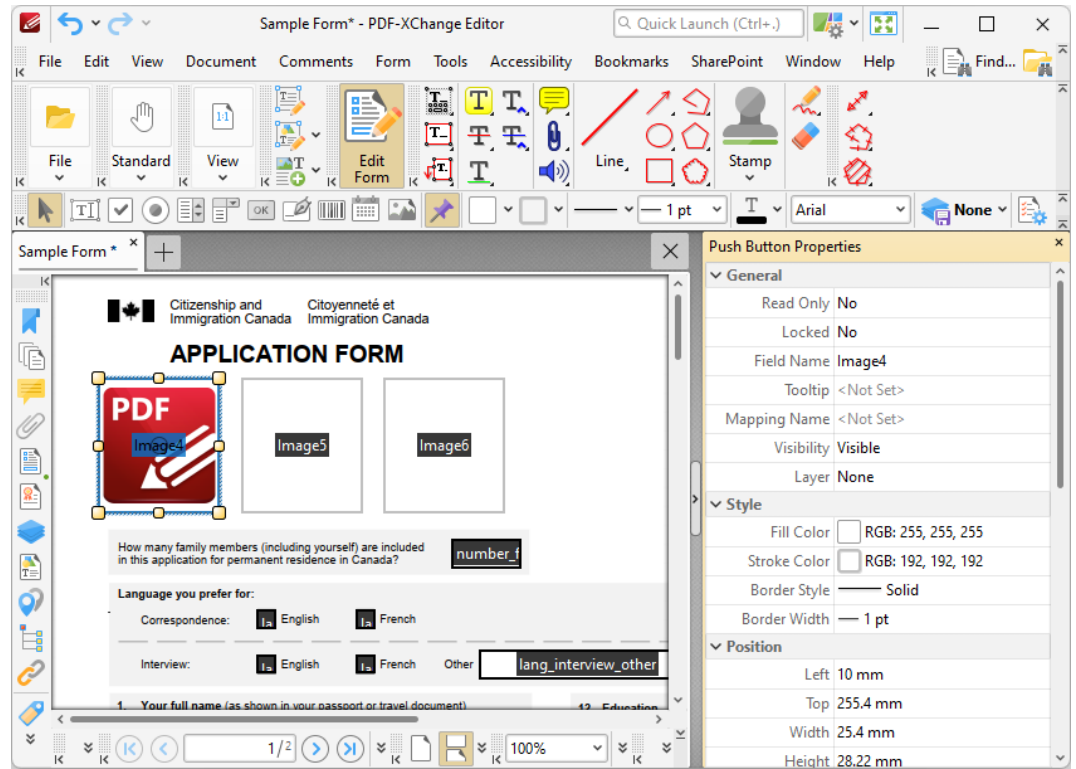
Figure 4. Image Field Tool, Push Button Properties Pane

The **Push Button Properties** pane can be used to determine a range of style and functionality options for image fields. For example, it is possible to use the **Actions** properties to add multiple dynamic actions to image fields, such as running JavaScript, launching web links and opening files on the local computer. (JavaScript is a high-level programming language that can be used to perform custom operations. See **here** for an index of existing JavaScript operations that the **PDF-XChange Editor** forms can use, as well as additional information about JavaScript).

The options detailed below are available for image fields:

The **General** properties determine the general parameters of image fields:

- **Read Only** determines whether or not the image field can be edited.
- **Locked** determines whether or not image fields can be moved, and whether or not their properties can be modified.
- **Field Name** determines the name of the image field. This name is present when the **Edit Form** tool is selected, and when image fields are listed in the **Fields pane.** 527
- **Tooltip** determines the information displayed when the pointer is hovered over the image field.
- **Mapping Name** determines the mapping name that the image field uses. This name is used to reference interactive form data when the form is exported,

and does so without affecting the appearance of the name in the original document.

- **Orientation** determines the orientation of the image field.
- **Visibility** determines the visibility of the image field.
- **Layer** determines the optional content layer to which the image field belongs. When a field belongs to an optional content layer, it displays only when the layer is enabled. Use the **Layers** pane to view/create/edit layers, as detailed **here.** 535

The **Style** properties determine stylistic elements of image fields. They are detailed beneath *(figure 3)*.

The **Position** properties determine the position and dimensions of image fields:

- **Left** determines the distance of the image field from the left margin.
- **Top** determines the distance of the image field from the bottom of the page.
- **Width/Height** determine the width/height of the image field.

The **Default Text Format** properties are not applicable to image fields.

The **Options** properties determine additional options for image fields.

- **Layout** determines the layout of the image field, which can be displayed as text label, icon or a combination of both elements:
  - **Label Only** is the default setting for standard buttons. The text label that the **Up Label** property specifies is the only element displayed on the button. The **Up Label** property becomes available in the **Options** properties when **Label Only** setting is enabled.
  - **Icon Only** uses the custom image that the **Up Icon** property specifies to represent the button. The **Up Label** property becomes available in the **Options** properties when **Icon Only** setting is enabled. Image fields are set to **Icon Only** by default.
  - **Icon Top, Label Bottom** displays a custom image as the upper section of the button and the text label beneath the image.
  - **Label Top, Icon Bottom** displays the text label as the upper section of the button and a custom image beneath the text.
  - **Icon Left, Label Right** displays a custom image on the left and the text label on the right.
  - **Label Left, Icon Right** displays the text label on the left and a custom image on the right.
  - **Label over Icon** uses a custom image to represent the button and places the text label over the image.

Figure 5. Available Layout Options for Image Fields

- **Behaviour** specifies the visual effect when buttons are pressed:
  - **None** specifies that no visual change occurs.
  - **Invert** inverts the fill color of the button.
  - **Outline** creates an outline around the button.
  - **Push** creates a visual effect when buttons are clicked:

Figure 6. Default to Invert (Top), Default to Outline (Centre) and Default to Push (Bottom)

- **Up Label** specifies the text that the button uses. N.b. A **Layout** property that specifies a label must be enabled for the option to be available.
- **Up Icon** specifies the icon that the button uses. N.b. A **Layout** property that specifies an icon must be enabled for the option to be available.

The **Icon Placement** properties determine settings for the icon used in the image field:
- **When to Scale** determines when icons are scaled to the size of the image field on which they are featured:
  - **Always** scales the icon to the size of the image field in all cases.
    - **Scale Type** determines how the icon is scaled:
      - **Proportionally** retains the aspect ratio of the icon
      - **Non-proportionally** ignores the aspect ratio of the icon.
  - **Never** retains the original size of the icon regardless of the size of the image field.

- **Icon is Too Big** scales icons in cases where icons are larger than the image field.
- **Icon is Too Small** scales icons in cases where icons are smaller than the image field.
- **Fit to Bounds** fits the icon to the bounds of the image field.
- **Horizontal Position** determines the horizontal position of the icon in the image field.
- **Vertical Position** determines the vertical position of the icon in the image field.

The **Actions** properties determine the action taken when users interact with the image field:

- **Mouse Down** initiates an action when the left mouse button is pressed (without being released).
- **Mouse Up** initiates an action when the left mouse button is clicked (pressed and released).
- **Mouse Enter** initiates an action when the pointer moves into the image field.
- **Mouse Leave** initiates an action when the pointer moves out of the image field.
- **On Focus** initiates an action when the image field is selected.
- **On Blur** initiates an action when the image field is deselected.
- Click the ellipsis icon on the right of actions to add/edit image field actions:
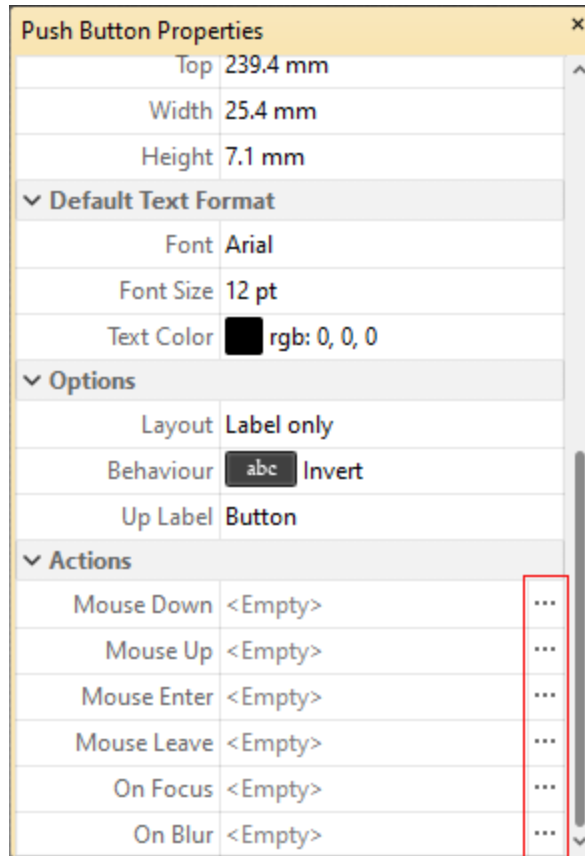
Figure 7. Image Field Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 992

5.3.1.3   Menu Toolbar

Menu Toolbar

The **Menu Toolbar** is located at the top of the main window:
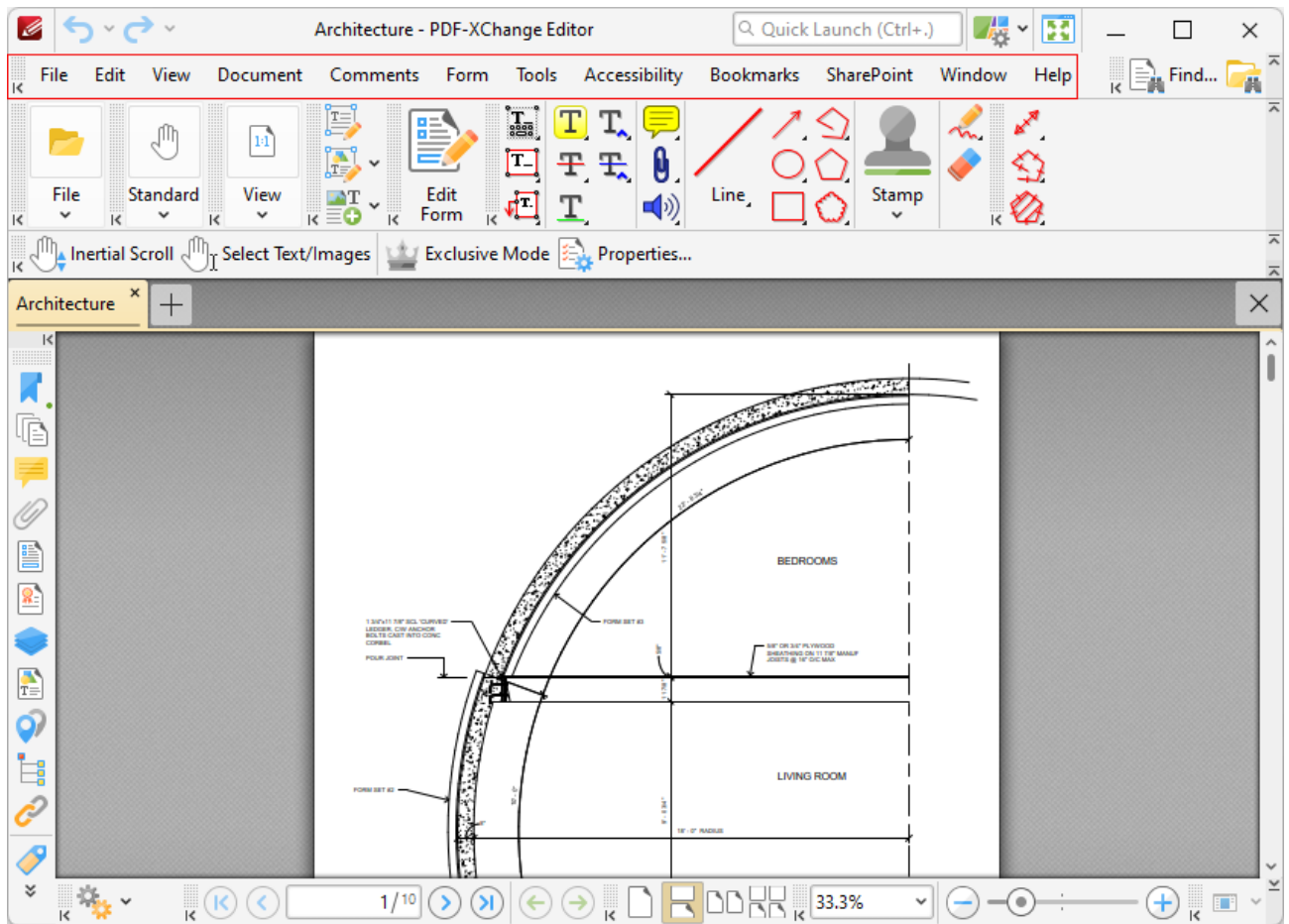
Figure 1. Menu Toolbar

- The **File** [86] tab contains file-level operations such as file select/save, document properties editing and print options.
- The **Edit** [203] tab contains editing functions for documents and their preferences.
- The **View** [312] tab determines the viewing settings of the application.
- The **Document** [631] tab contains features for editing documents.

- The **Comments** ⌐773⌐ tab contains editing options for comments.
- The **Form** ⌐793⌐ tab contains options for managing and editing forms and form data.
- The **Tools** ⌐803⌐ tab contains the **PDF-XChange Editor** tools for the manipulation and editing of documents.
- The **Bookmarks** ⌐1042⌐ tab contains options that relate to document bookmarks.
- The **Sharepoint** ⌐1091⌐ tab allows users to work with documents located on **Sharepoint** servers.
- The **Window** ⌐1096⌐ tab contains layout options for the panes and windows of open documents.
- The **Help** ⌐1098⌐ tab contains help options, as well as options for updating license keys and reporting bugs.

When the Alt key is pressed each tab features an underlined letter. Press the letter on the keyboard to open the associated submenu.

The **Menu Toolbar** can be repositioned as desired. Hover the pointer over the grid of dots in the top-left of the **Menu Toolbar** to reposition it. The pointer will change from a standard icon to a four-way arrow. Click and hold the **Menu Toolbar** to reposition it. It is also possible to customize the **Menu Toolbar**. See **here** ⌐492⌐ for further information.

5.3.1.4   Other Toolbars

Other Toolbars

The other toolbars in the **PDF-XChange Editor** user interface are detailed below:

▼ **Document Options Toolbar**

The **Document Options Toolbar** is located in the lower left corner of the main window:
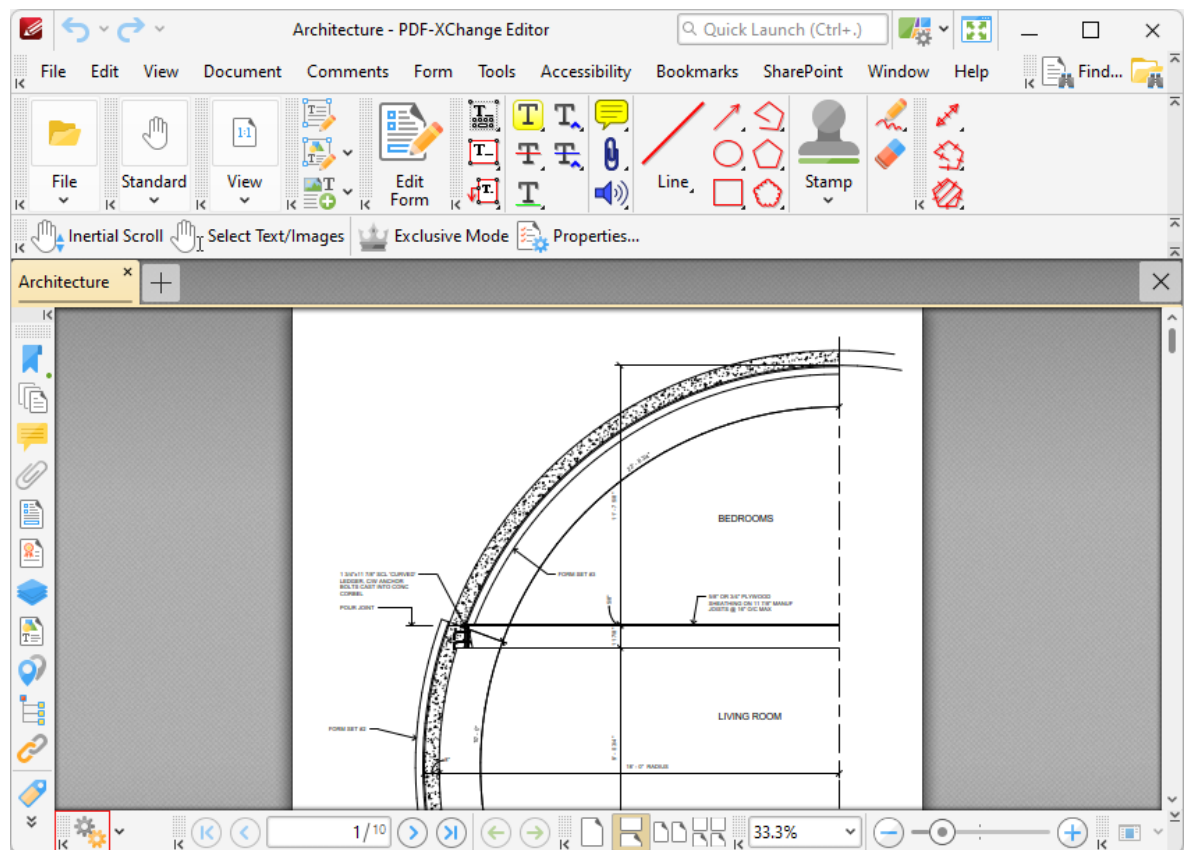
Figure 1. Document Options Toolbar

Click the dropdown arrow to access the options detailed below:
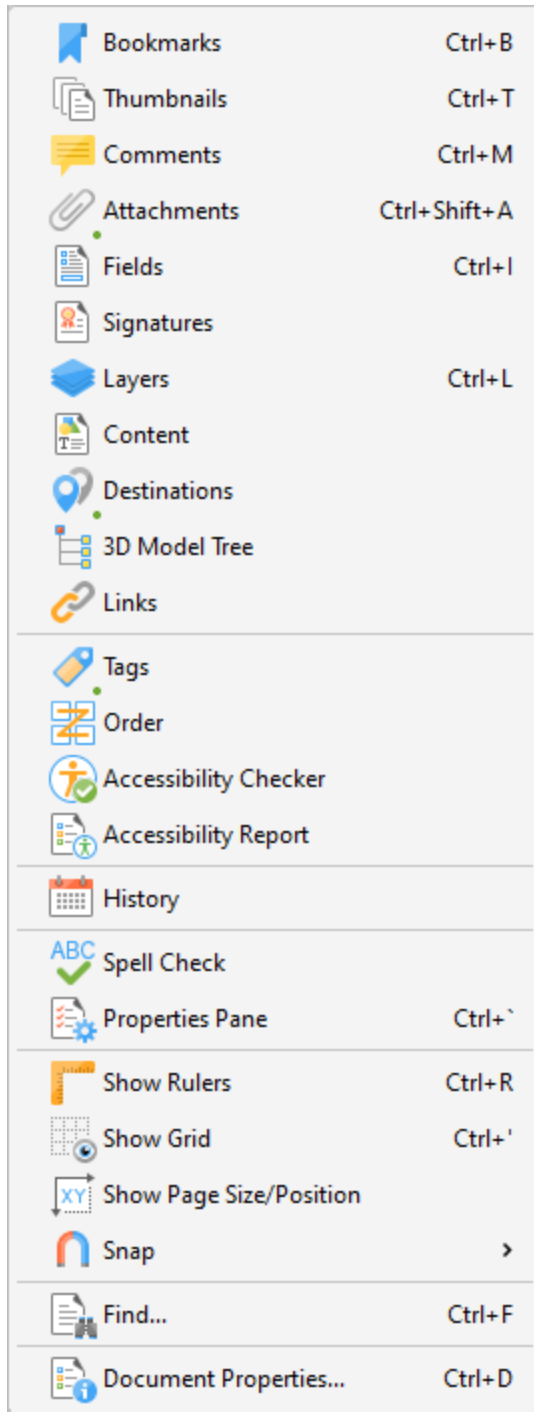
Figure 2. Document Options Menu

- Click **Bookmarks** to open the **Bookmarks** pane. See <u>here</u> ⬚504 for further information.
- Click **Thumbnails** to open the **Tumbnails** pane. See <u>here</u> ⬚510 for further information.
- Click **Comments** to open the **Comments** pane. See <u>here</u> ⬚519 for further information.
- Click **Attachments** to open the **Attachments** pane. See <u>here</u> ⬚524 for further information.
- Click **Fields** to open the **Fields** pane. See <u>here</u> ⬚527 for further information.

- Click **Signatures** to open the **Signatures** pane. See **here** 741 for further information.
- Click **Layers** to open the **Layers** pane. See **here** 535 for further information.
- Click **Content** to open the **Content** pane. See **here** 548 for further information.
- Click **Destinations** to open the **Destinations** pane. See **here** 553 for further information.
- Click **3D Model Tree Pane** to open the **3D Model Tree** pane. See **here** 561 for further information.
- Click **Links** to open the **Links** pane. See **here** 565 for further information.
- Click **Tags** to open the **Tags** pane. See **here** 569 for further information.
- Click **Order** to open the **Order** pane. See **here** 574 for further information.
- Click **Accessibility Checker** to open the **Accessibility Checker** pane. See **here** 579 for further information.
- Click **Accessibility Report** to open the **Accessibility Report** pane. See **here** 582 for further information.
- Click **History** to open the **History** pane. See **here** 600 for further information.
- Click **Spell Check** to check the spelling of the active document. See **here** 766 for further information.
- Click **Properties Pane** to open the **Properties** pane. See **here** 213 for further information.
- Click **Show Rulers** to view/hide the document rulers. See **here** 610 for further information.
- Click **Show Grid** to insert a grid behind the active document to assist in the accurate placement of document content. See **here** 610 for further information.
- Click **Show Page Size/Position** to view/hide **Page Measurement** information.
- Hover over **Snap** to view options for snapping:
  - Click **Enable Snapping** to enable/disable snapping.
  - Click **Snap to Grid** to enable/disable snapping to grids.
  - Click **Snap to Guides** to enable/disable snapping to guides.
  - Click **Snap to Objects** to enable/disable snapping to objects.
  - Click **Snap Options** to customize options for snapping, as detailed **here.** 615
- Click **Find** to launch the find text function. See **here** 215 for further information.
- Click **Document Properties** to launch the **Document Properties** dialog box. See **here** 185 for further information.

▼ **Edit Content Toolbar**

The **Edit Content Toolbar** contains options for editing document content:
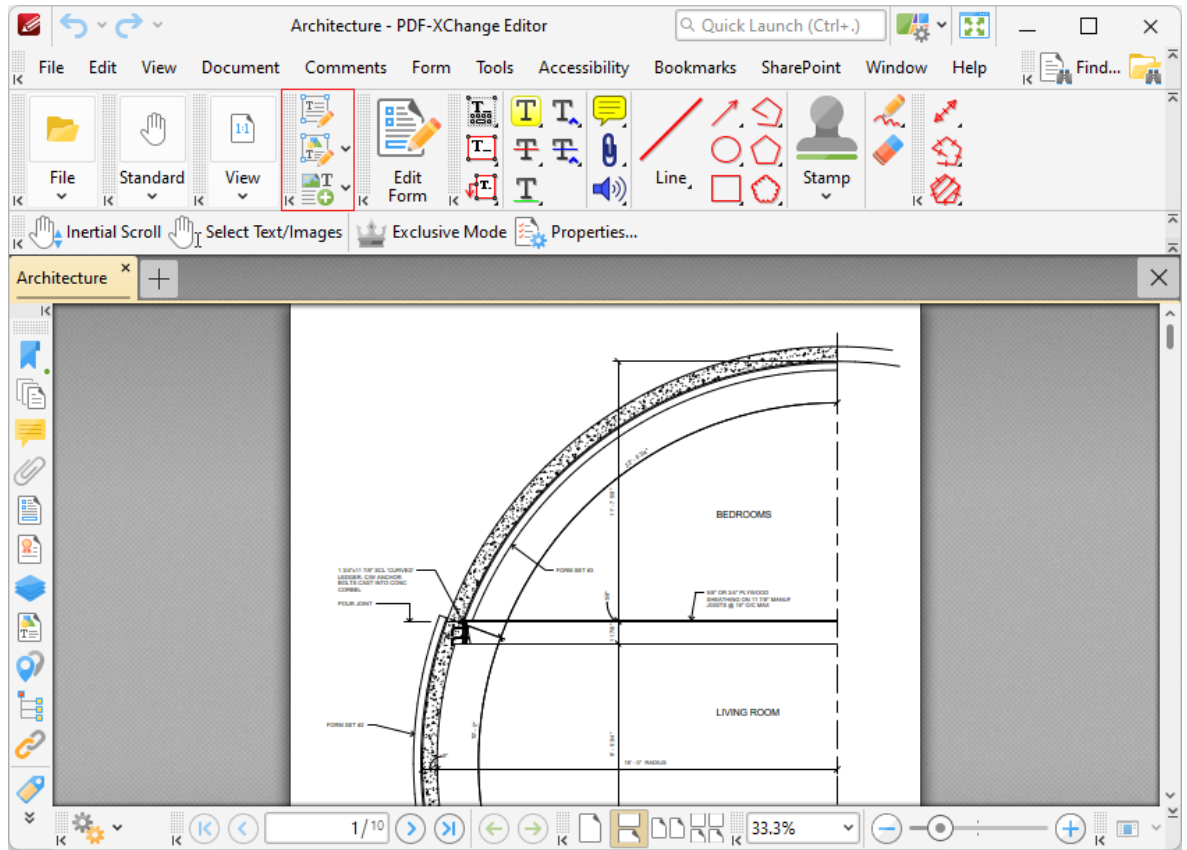
Figure 3. Edit Content Toolbar

- Click **Edit Objects** to activate the **Edit Objects Tool** ⌐824⌐ and edit page content. When this tool selected, the active document is divided into editable sections based on the images and text it contains. These sections can then be resized, repositioned and edited as desired. Click the dropdown arrow next to this icon for further options:
  - Select **All** to edit all page content. The **Edit Objects Tool** will then select all document text when it is used to edit documents.
  - Select **Text Elements** to edit only textual page content. The **Edit Objects Tool** will then select only document text.
  - Select **Images** to edit only document images. The **Edit Objects Tool** will then select only images.
  - Select **Shapes** to edit only document shapes. The **Edit Objects Tool** will then select only paths and shadings.
- Click **Add** to add content to documents. The following options are available:
  - Click **Add Text** to add text to documents, as detailed **here.** ⌐835⌐
  - Click **Add Image** to add images to documents, as detailed **here.** ⌐839⌐
  - Click **Add Barcode** to add barcodes to documents, as detailed **here.** ⌐842⌐

Further information about editing pages is available **here.** ⌐1138⌐

▼ File Toolbar

The **File Toolbar** contains file-level options for documents:
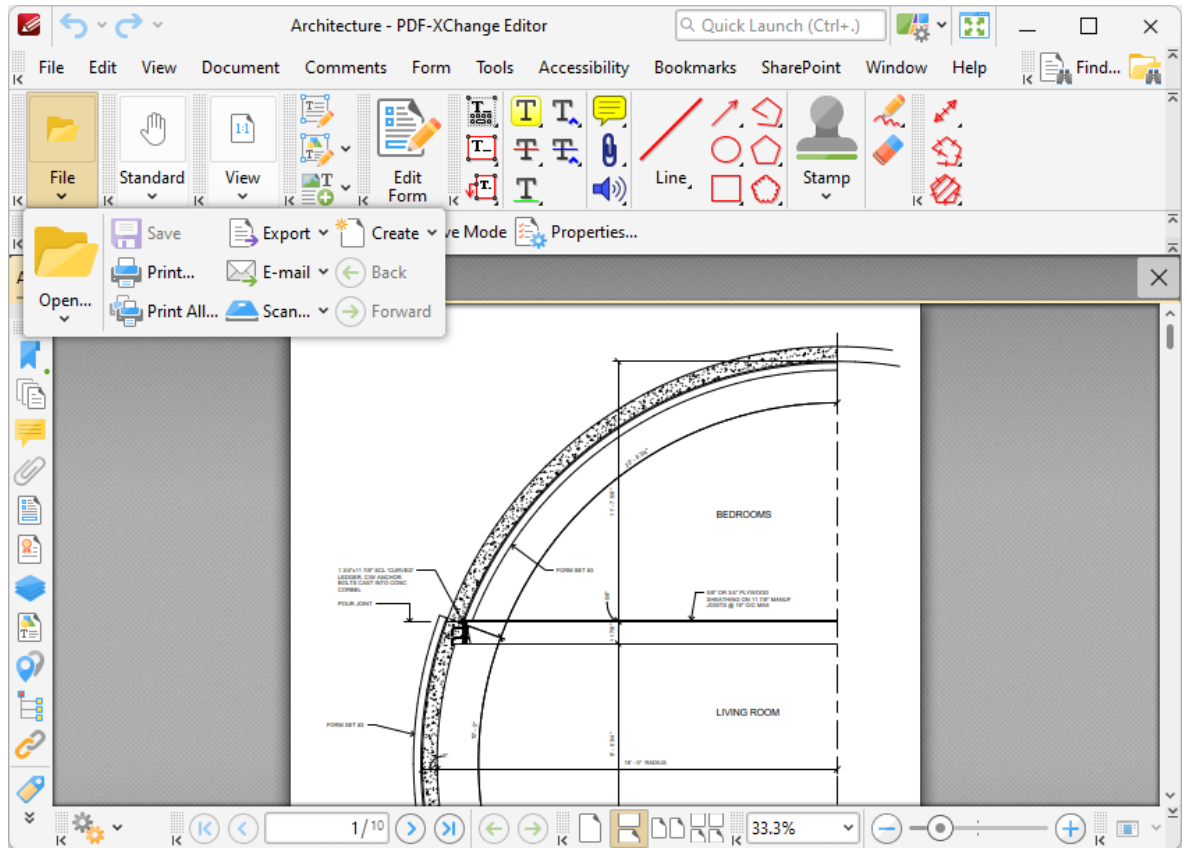
Figure 4. File Toolbar

- Click **Open** to open documents. Click the dropdown arrow to view recent documents.
- Click **Save** to save documents.
- Click **Print** to print documents. See **here** [179] for further information.
- Click **Scan** to scan documents. See **here** [152] for further information.
- Click **Email** to email documents from **PDF-XChange Editor.** See **here** [159] for further information.
- Click **Back** (or Ctrl+left arrow key) to move to the previous document location.
- Click **Forward** (or Ctrl+right arrow key) to move to the next document location. This action becomes available when the **Back** action has been used.

▼ **Launch Application Toolbar**

The **Launch Application Toolbar** is located on the lower-right corner of the main window:
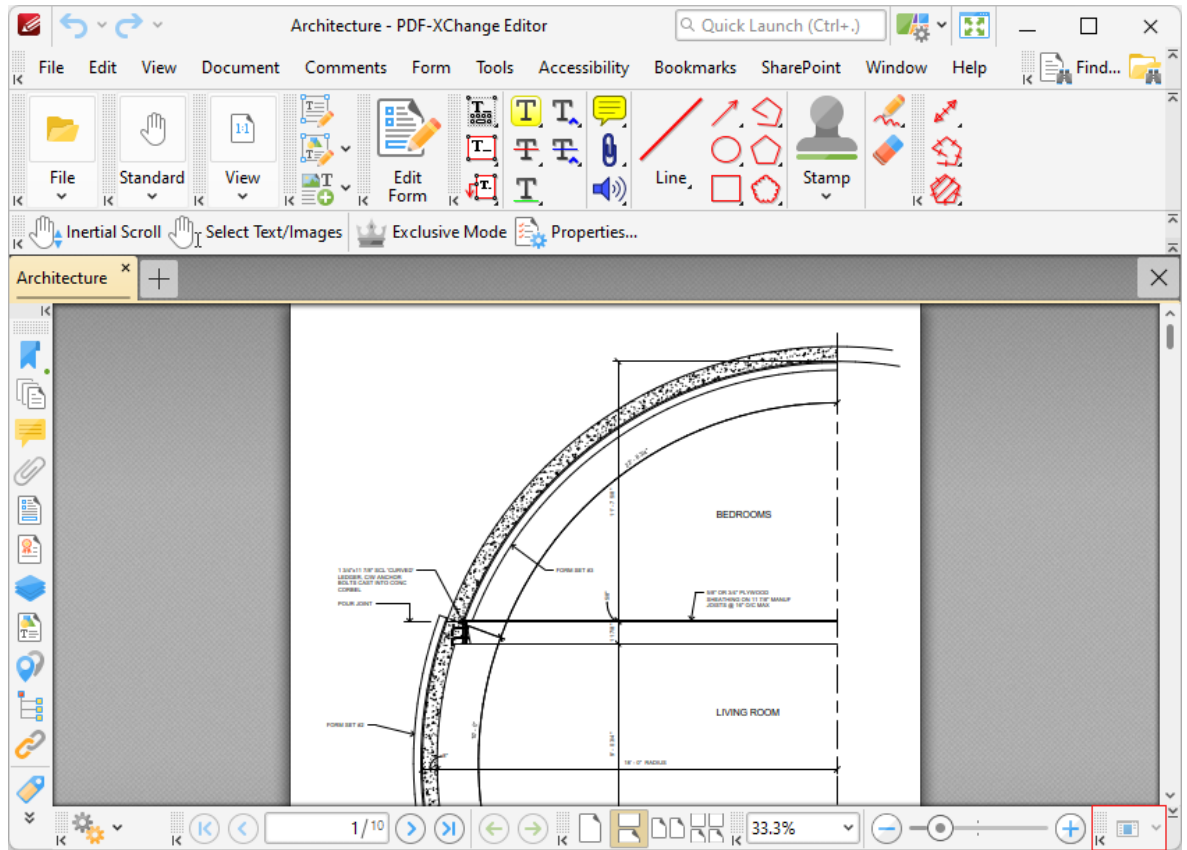
Figure 5. Launch Application Location

This toolbar provides a convenient way to open active documents using third party applications. Click the dropdown arrow to view applications currently available via the **Launch Application Toolbar**:
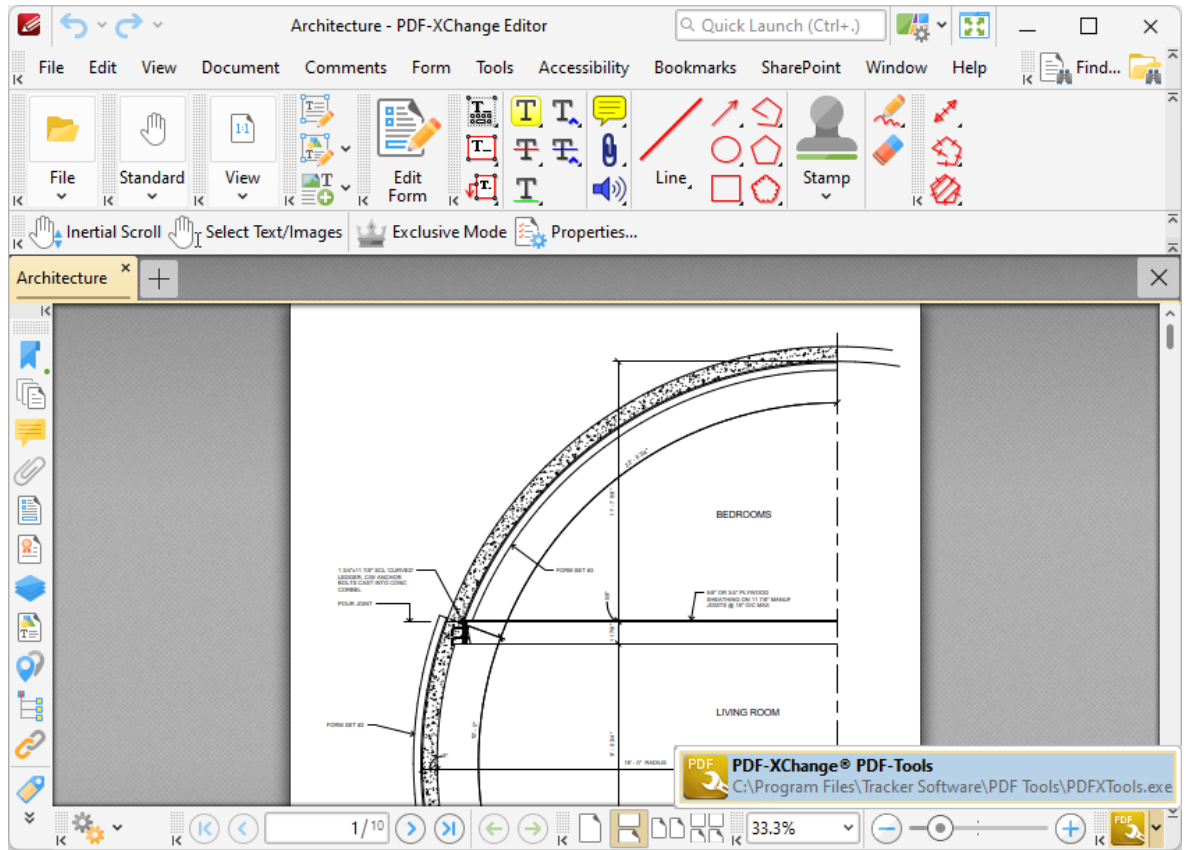
Figure 6. Launch Application Toolbar Active

See **here** 271 for instructions on how to add applications to this toolbar.

▼ **Measure Toolbar**

The **Measure Toolbar** contains options for measuring specific elements of documents:
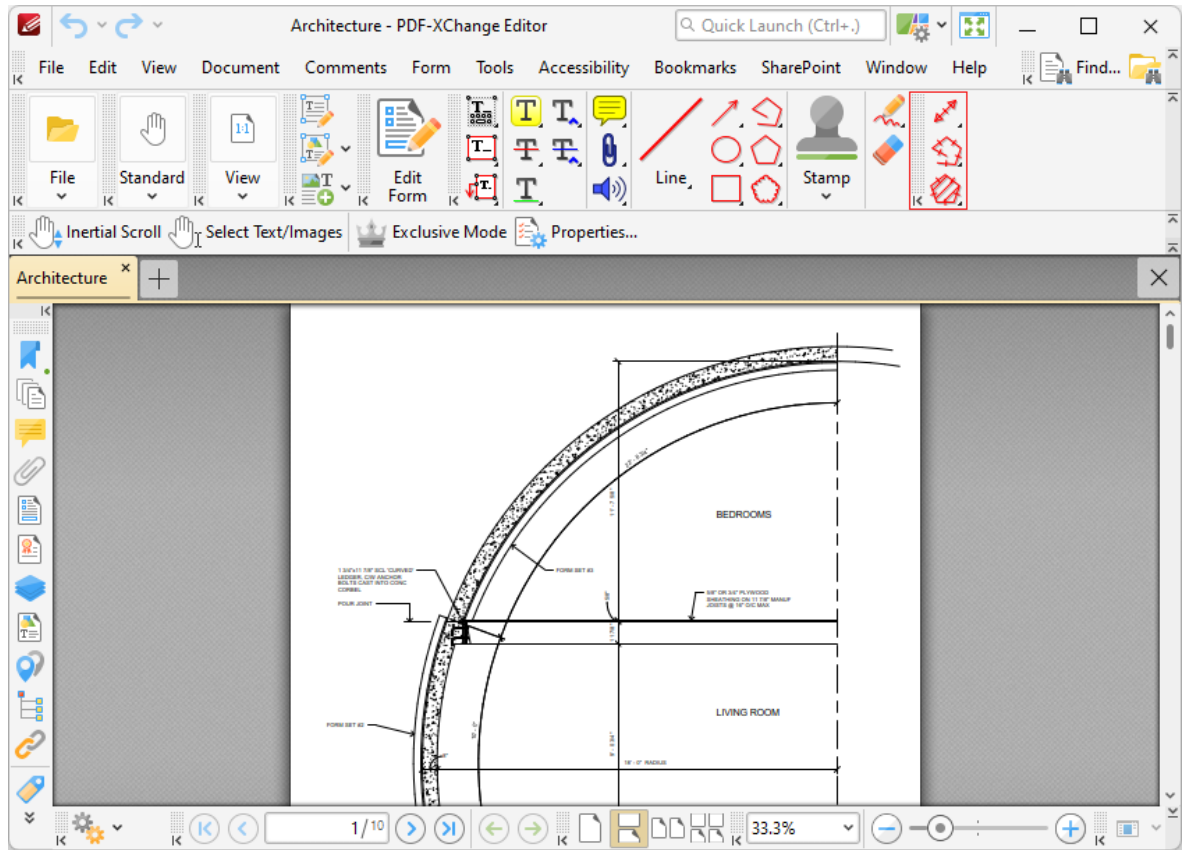
Figure 7. Measure Toolbar

The following options are available:

The **Distance Tool** is used to measure the distance between two points. See **here** [971] for further information.

The **Perimeter Tool** is used to measure the distance between multiple points. See **here** [976] for further information.

The **Area Tool** is used to measure the area within designated lines. See **here** [981] for further information.

▼ **Page Layout Toolbar**

The **Page Layout Toolbar** is located on the lower right side of the main window:
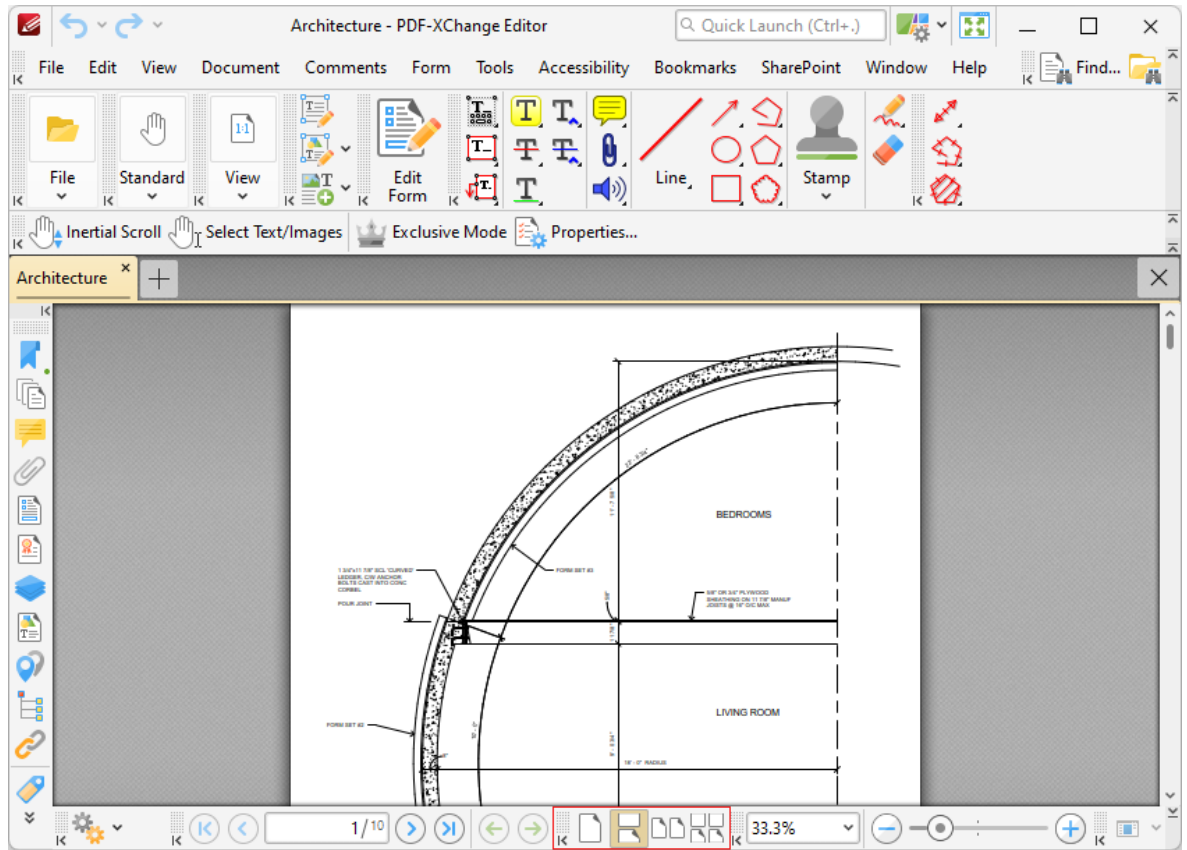
Figure 8. Page Layout Toolbar

- 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:
    - **Single Page** displays documents a single whole page at a time.
    - **Continuous** displays documents as single pages continuously, which means consecutive pages can be viewed at the same time when scrolling.
    - **Two Pages** displays documents two whole pages at a time. Pages are placed adjacently in the main window.
    - **Two Pages Continuous** displays documents as two pages continuously, which means consecutive pairs of pages can be viewed at the same time when scrolling.

Further options relating to the page display are available **here.**

▼ **Page Navigation Toolbar**

The **Page Navigation Toolbar** is located at the bottom of the main window:
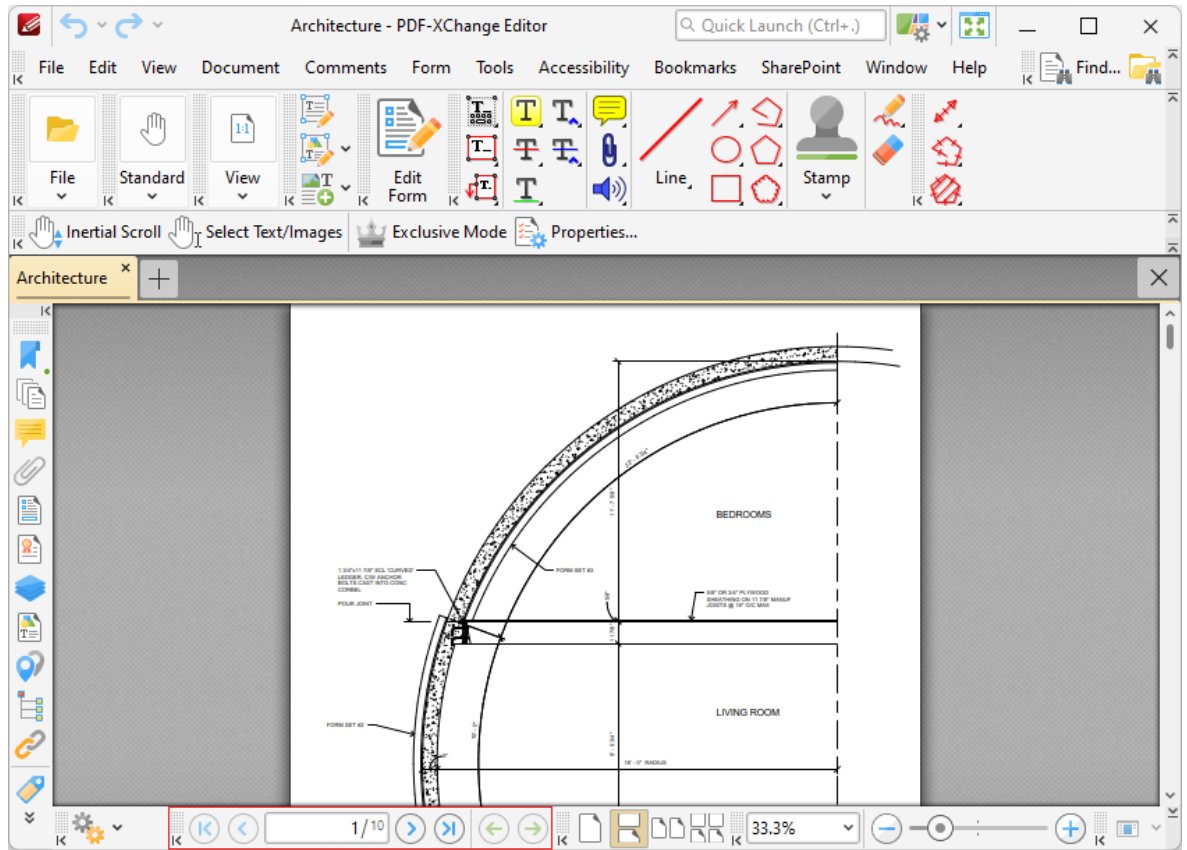
Figure 9. Page Navigation Toolbar

- Click the blue arrow icons to move to the first page, previous page, next page or last page of documents.
- Click the green arrow icons to move between the most recent document views.
- The number box at the center of the **Page Navigation** toolbar shows the current page and the total number of pages in the active document. Enter a page number and press **Enter** to move to it.

▼ **Page Zoom Toolbar**

The **Page Zoom Toolbar** is located in the lower-right section of the main window:
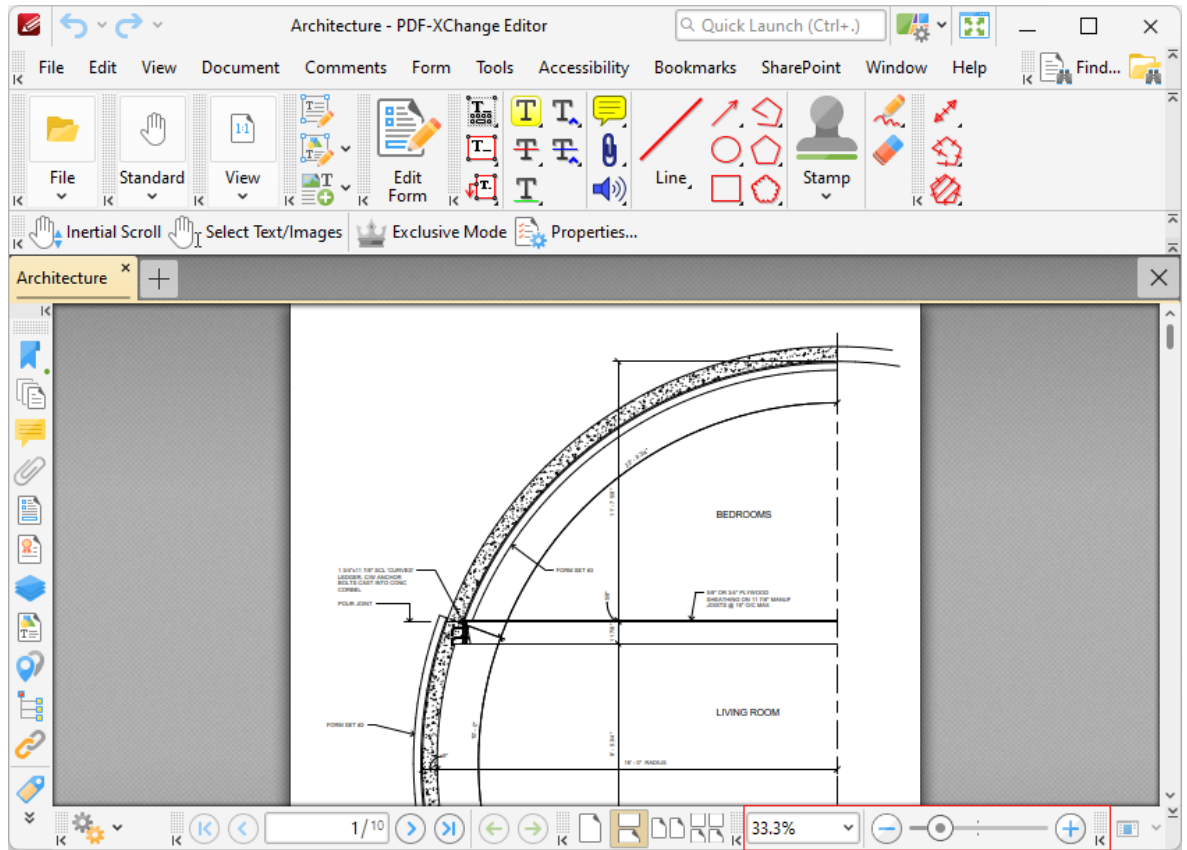
Figure 10. Page Zoom Toolbar

The **Page Zoom Toolbar** is used to zoom in on/out from the active document:

- Use the options in the dropdown menu to select a predefined zoom level.
- Clear the number box, then enter a custom zoom level and press Enter to zoom to a custom level.
- Click the plus and minus icons on either side of the zoom slider to move between predefined zoom levels.
- Click and drag the slider to move to a custom zoom level.

Properties Toolbar

The **Properties Toolbar** is located in the upper section of the main window:
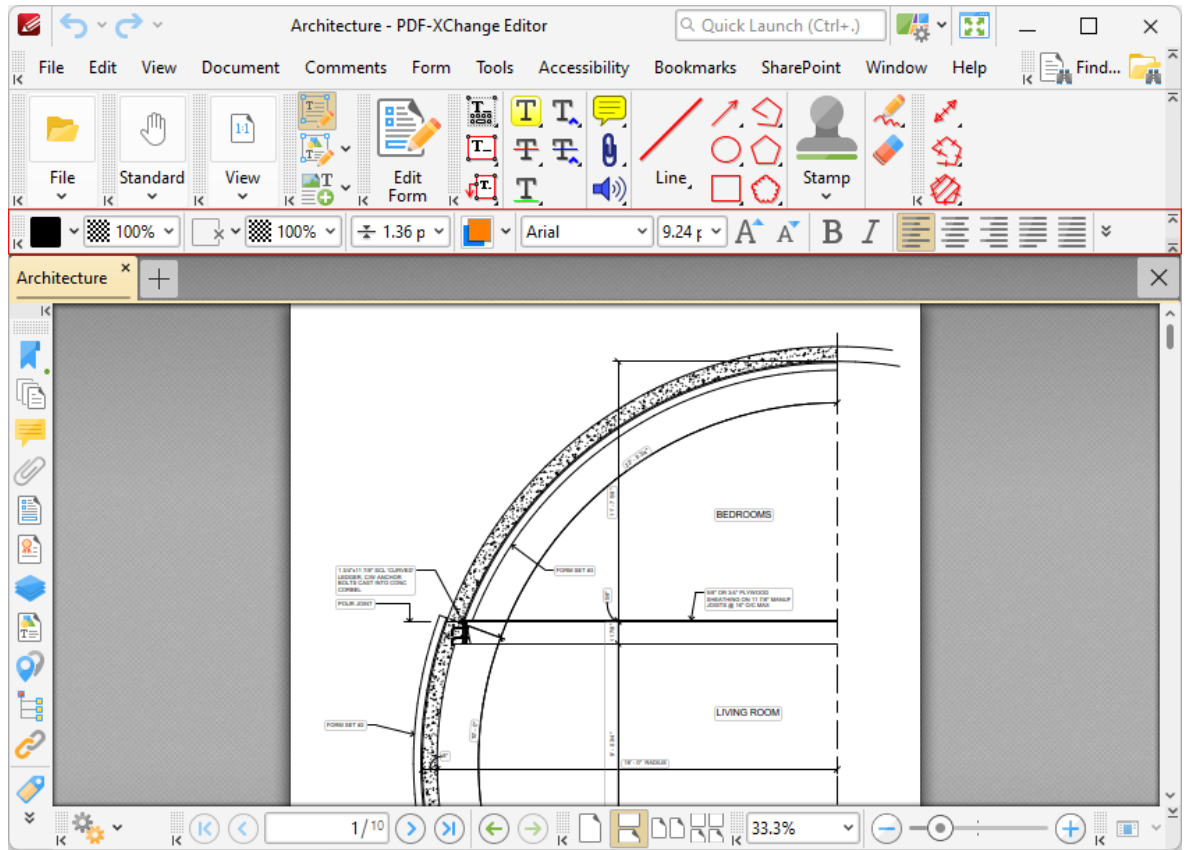
Figure 11. Properties Toolbar

The **Properties Toolbar** becomes active when an object or tool that features customizable options is selected. The options in the **Properties Toolbar** depend on the content selected:

- The properties available when tools are in use are detailed on the tool pages, which are available **here.** 803
- Text editing options are detailed in the **Properties Toolbar** when tools that feature text options are in use. See **here** 1288 for further information.
- Press Ctrl+E to show/hide the **Properties Toolbar.**

Quick Access, Quick Find and Quick Launch Toolbars

These toolbars are located in the upper section of the user interface:
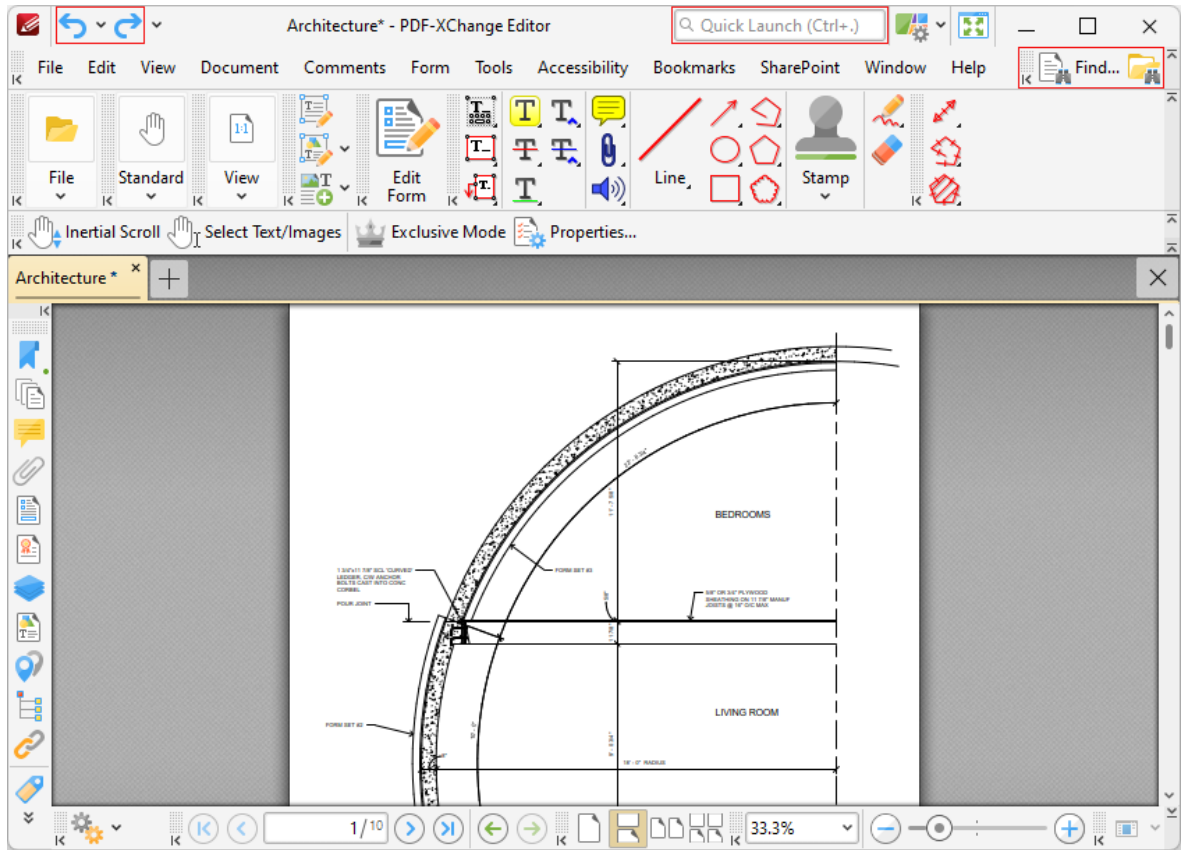
Figure 12. Quick Access, Quick Launch and Quick Find Toolbars

- Click ↺ **Undo** to undo the most recent editing action.
- Click ↻ **Redo** to reverse the most recent undo action.
- Click 🔍 **Find** to activate the **Find**[215] function and locate specified text in the active document.
- Click 🔍 **Search** to open the **Search**[217] pane and search documents open in **PDF-XChange Editor** or folders on the local computer.
- Click ⛶ **Full Screen Mode** to view the active document in full screen mode.
- Click 🔍 **Quick Launch** text box to find and launch commands in **PDF-XChange Editor** - enter search terms in the text box and then click search results to activate them.
- Click ⚙ **UI Options** to toggle between the options for the display of the user interface:
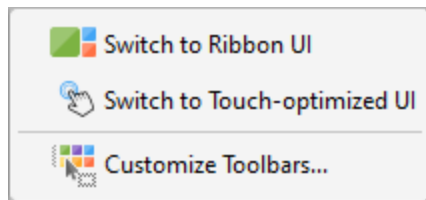
Figure 13. UI Options

- Click **Switch to Ribbon UI** to switch to the ribbon layout:
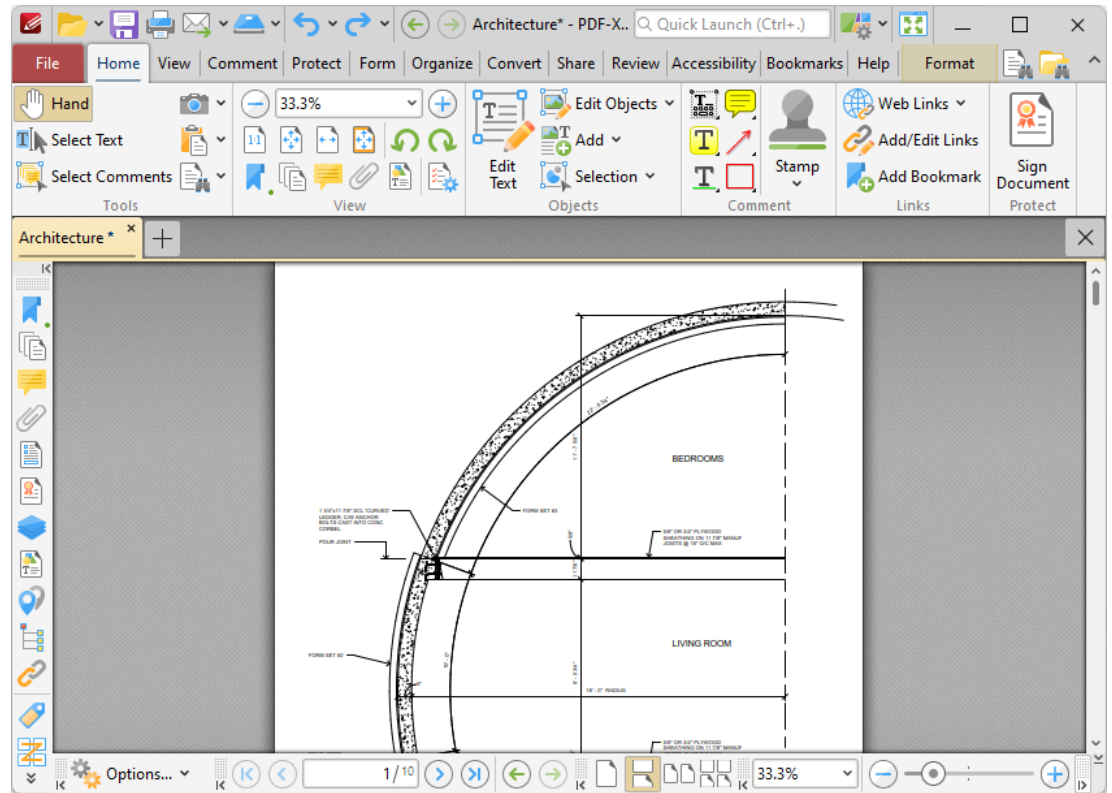
Figure 14. Ribbon UI Layout

The ribbon layout utilizes contextual tabs instead of menus and submenu items. This means that the submenu items displayed in the classic UI layout are displayed instead as icons in the user interface, which eliminates the need for several parallel toolbars and streamlines the use of **PDF-XChange Editor.** The layout of the features and functionality in the ribbon UI varies from the classic UI. The manual will be updated to include the ribbon UI in the near future.

- Click **Switch to Touch-optimized UI** to switch from **Mouse-optimized UI** to **Touch-Optimized UI** and vice versa. The **Touch-optimized UI** features larger icons and is intended for use in conjunction with tablets, smartphones and similar devices.
- Click **Customize Toolbars** to customize the layout of toolbars, the commands that they contain and their display/locking options. See **here** 492 for further information.

▼ **Standard Toolbar**

The **Standard Toolbar** contains options for viewing/editing documents:
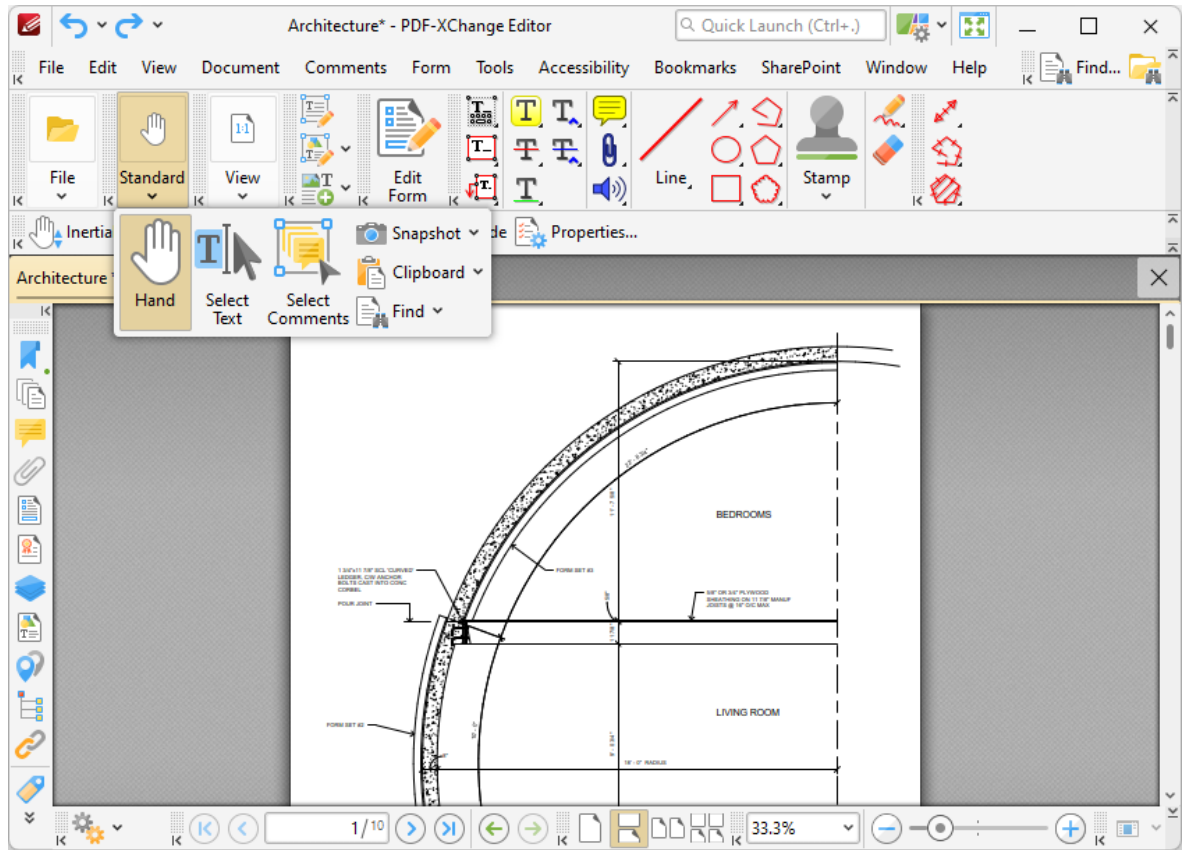
Figure 15. Standard Toolbar

- Click **Hand** to activate the **Hand Tool** ⁸⁰⁷ and scroll through documents.
- Click **Select Text** to activate the **Select Text Tool** ⁸¹¹ and select text for editing purposes.
- Click **Select Comments** to activate the **Select Comments Tool** ⁸⁴⁶ and select comments for editing purposes.
- Click **Snapshot** to activate the **Snapshot Tool** ⁸⁰⁹ to take snapshots of pages areas/images.
- Click **Clipboard** to cut/copy/paste from the clipboard.
- Click **Find** to activate the **Find,** ²¹⁵ **Search** ²¹⁷ or **Internet Search** ⁸¹¹ features. These features are used to locate specified text in documents or on the internet.

▼ View Toolbar

The **View Toolbar** contains options to manipulate the page view and enable the **Zoom Tools:**
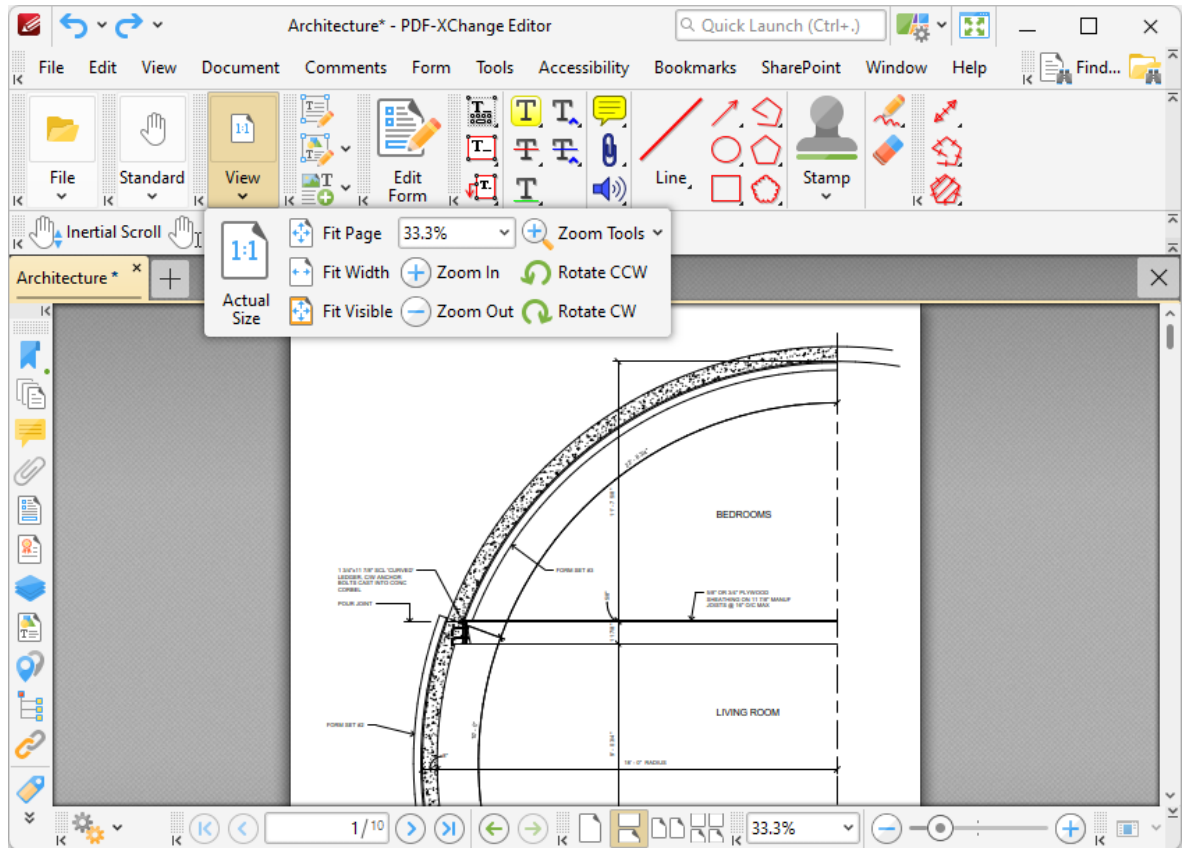
Figure 16. View Toolbar

- Click **Actual Size** to set the zoom level to 100% and view pages at their actual size.
- Click **Fit Page** 🔲 to fit the page length to the editing space of the user interface.
- Click **Fit Width** 🔲 to fit the page width to the editing space of the user interface.
- Click **Fit Visible** 🔲 to fit the page width to the editing space of the user interface and ignore white page margins.
- Click **Zoom In/Zoom Out** to zoom in on/out from the active document.
- Click **Zoom Tools** 🔍 to activate the **Zoom Tools:**
  - The **Zoom In/Out Tool** is used to zoom in on/out from the active document. The pointer becomes a magnifying glass icon when this tool is enabled. Move it to the desired location and then click to zoom. Hold down Ctrl and click to zoom out.
  - The **Loupe Tool** utilizes a zoom pane that magnifies page portions to assist in document editing. See **here** 817 for further information.
  - The **Pan and Zoom Tool** utilizes a zoom pane that enables dynamic page navigation. See **here** 820 for further information.
- Click **Rotate CCW** 🔄 to rotate the current view ninety degrees counter-clockwise.
- Click **Rotate CW** 🔄 to rotate the current view ninety degrees clockwise.

5.3.1.5   Customize Toolbars

Customize Toolbars

Click **Customize Toolbars** to determine toolbar settings and create/edit customized toolbars:
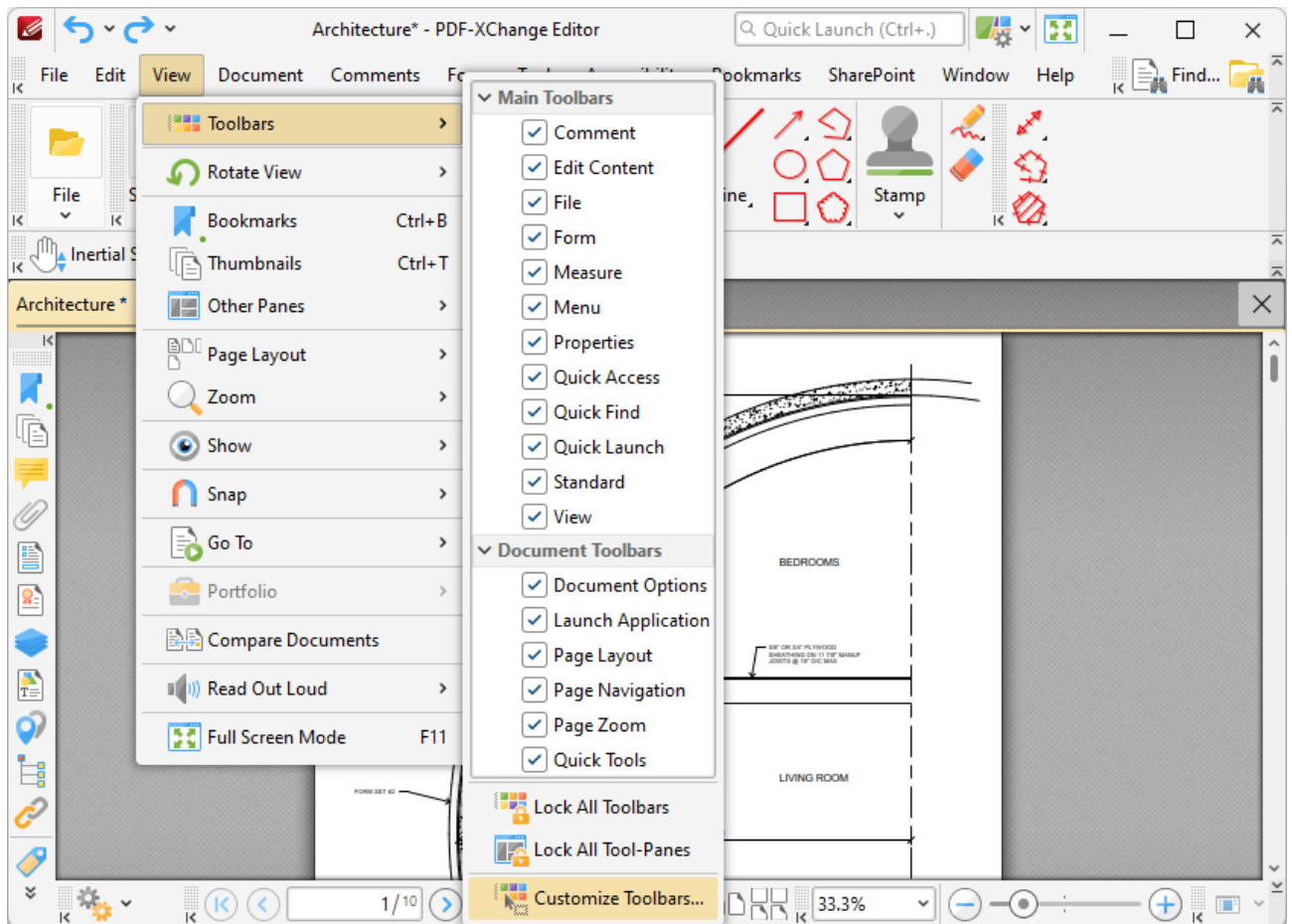
Figure 1. View Tab Submenu. Customize Toolbars

The **Customize Toolbars** dialog box will open:
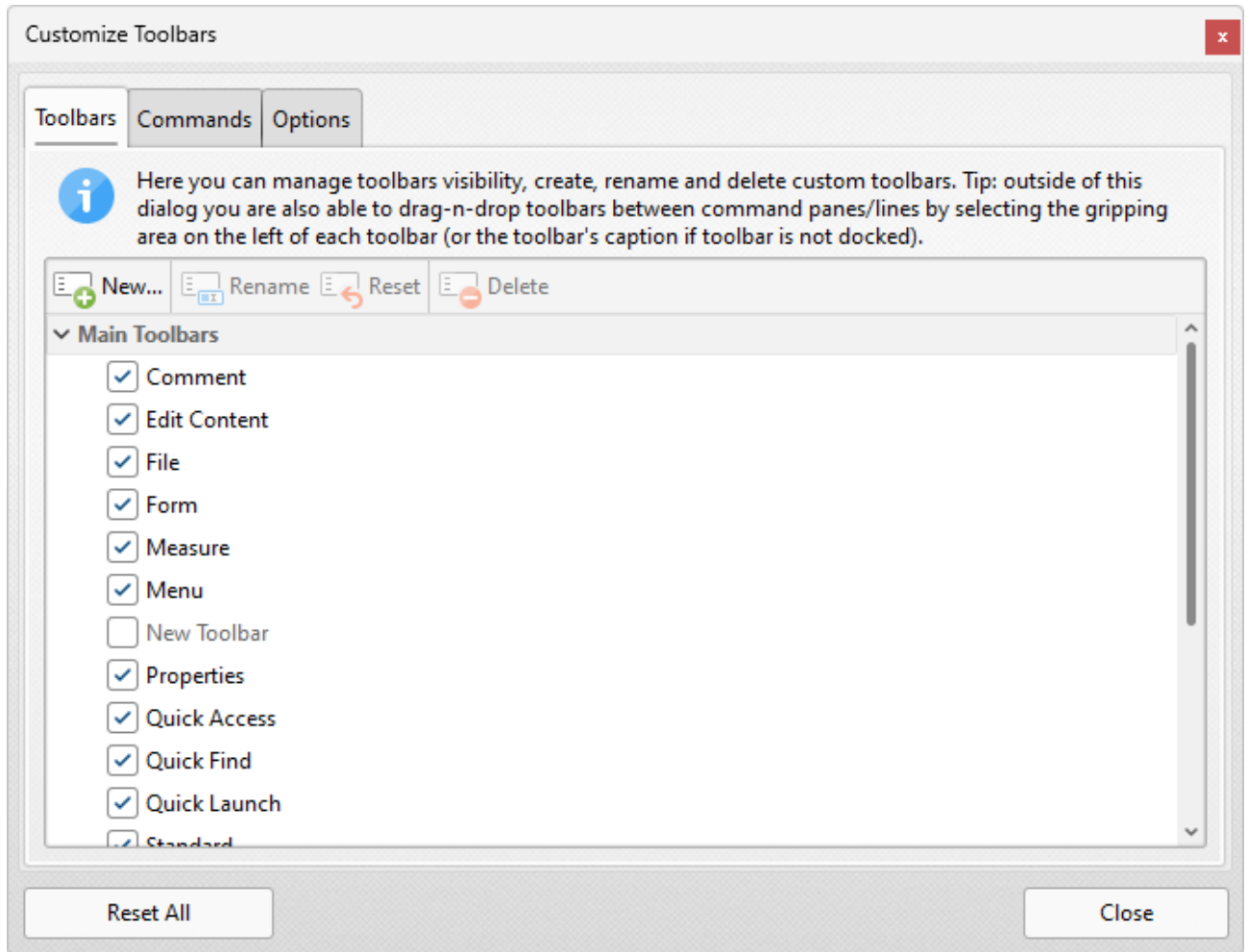
Figure 2. Customize Toolbars Dialog Box, Toolbars Tab Selected

All application toolbars are displayed in the **Toolbars** tab.

- Select/clear toolbar check boxes to show/hide toolbars in the main window.
- Click **New** to create new toolbars. The **New Toolbar** dialog box will open. Enter a title for the new toolbar and click **OK.** The new toolbar will appear on the left side of the **Properties Toolbar,** as detailed in *(figure 5).*
- Click **Rename** to rename selected toolbars. (Please note that this setting is intended for use with custom toolbars. The default application toolbars cannot be renamed).
- Click **Reset** to restore selected toolbars to their default settings.
- Click **Delete** to delete selected toolbars. (Please note that this setting is intended for use with custom toolbars. The default application toolbars cannot be deleted).

All the available commands in **PDF-XChange Editor** are contained in the **Commands** tab:
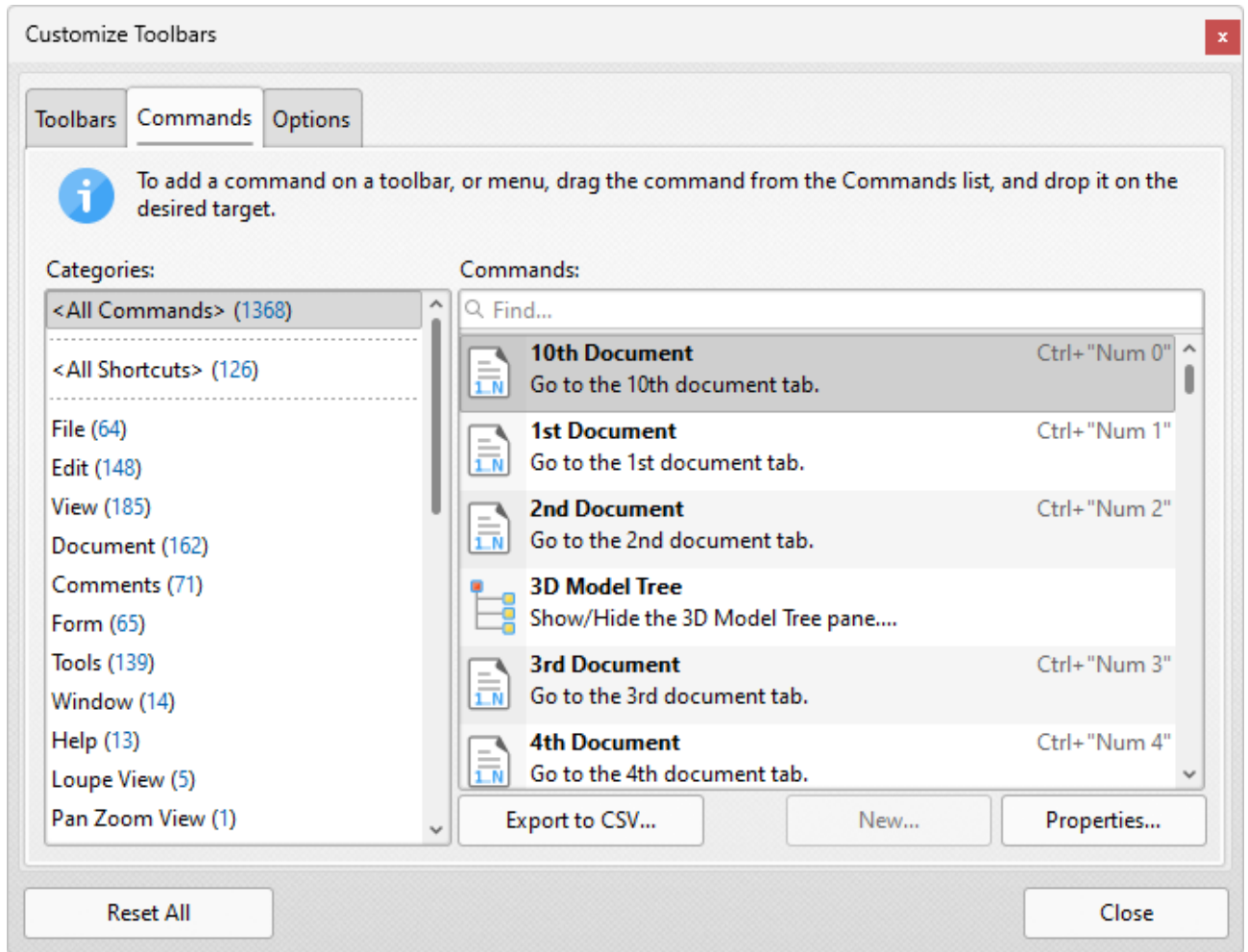
Figure 3. Customize Toolbars Dialog Box, Commands Tab Selected

- Use the **Categories** menu to determine the group of commands displayed in the viewing pane.
- Use the **Commands** text box to search for commands.
- Click and drag commands to the desired toolbar/submenu in the main window of **PDF-XChange Editor.**
- Click **Properties** to view/edit the properties/tooltip/keyboard shortcuts and other variables for selected commands.
- Click **Export to CSV** to export a list of all available commands to a comma-separated-values file.
- Please note that customized comment styles are available in the **Custom Comment Styles** category. Options for customizing comment styles are detailed **here.** ⁷⁹¹

Click the **Options** tab to enable/disable further toolbar options:
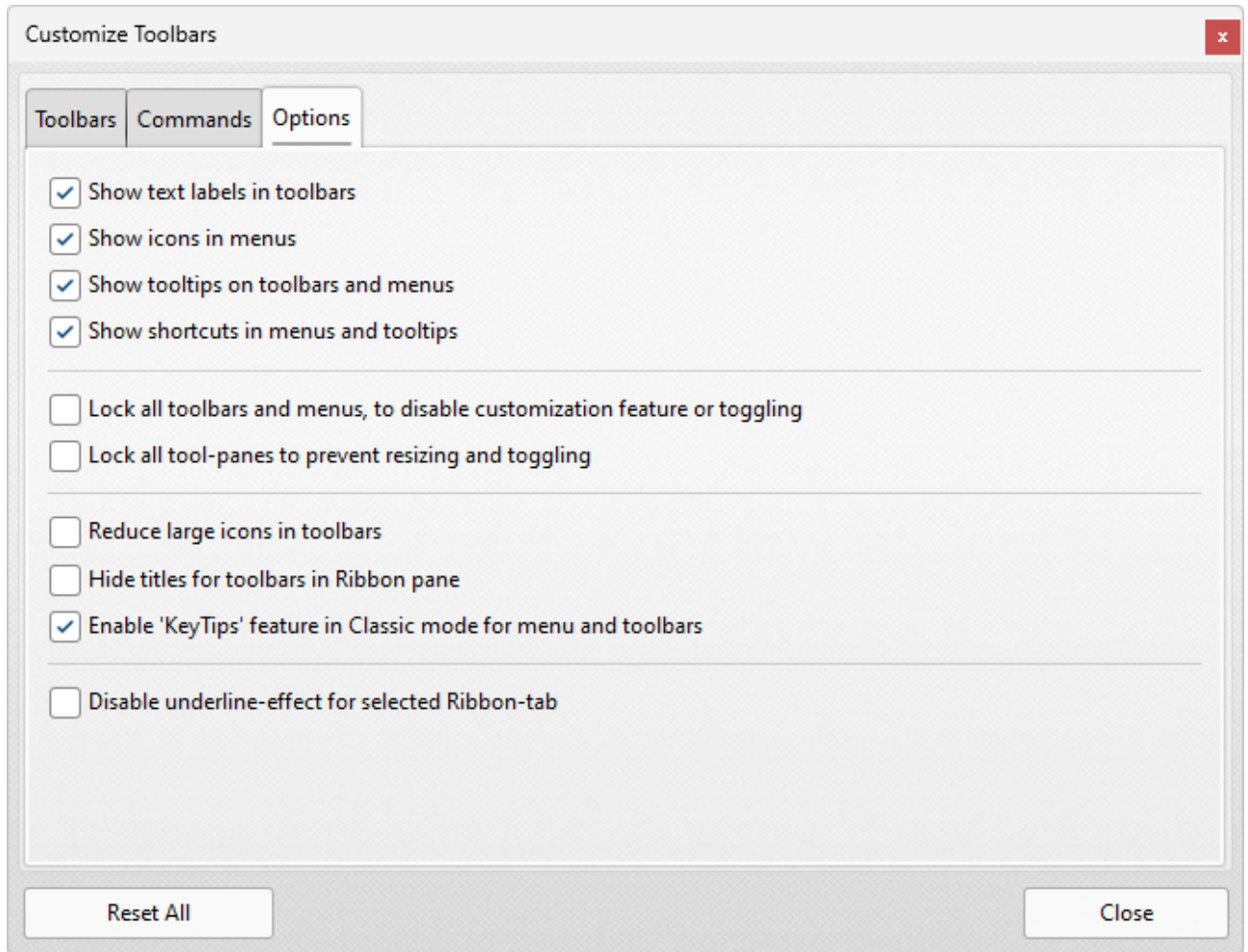
Figure 4. Customize Toolbar Options

New toolbars appear as below:
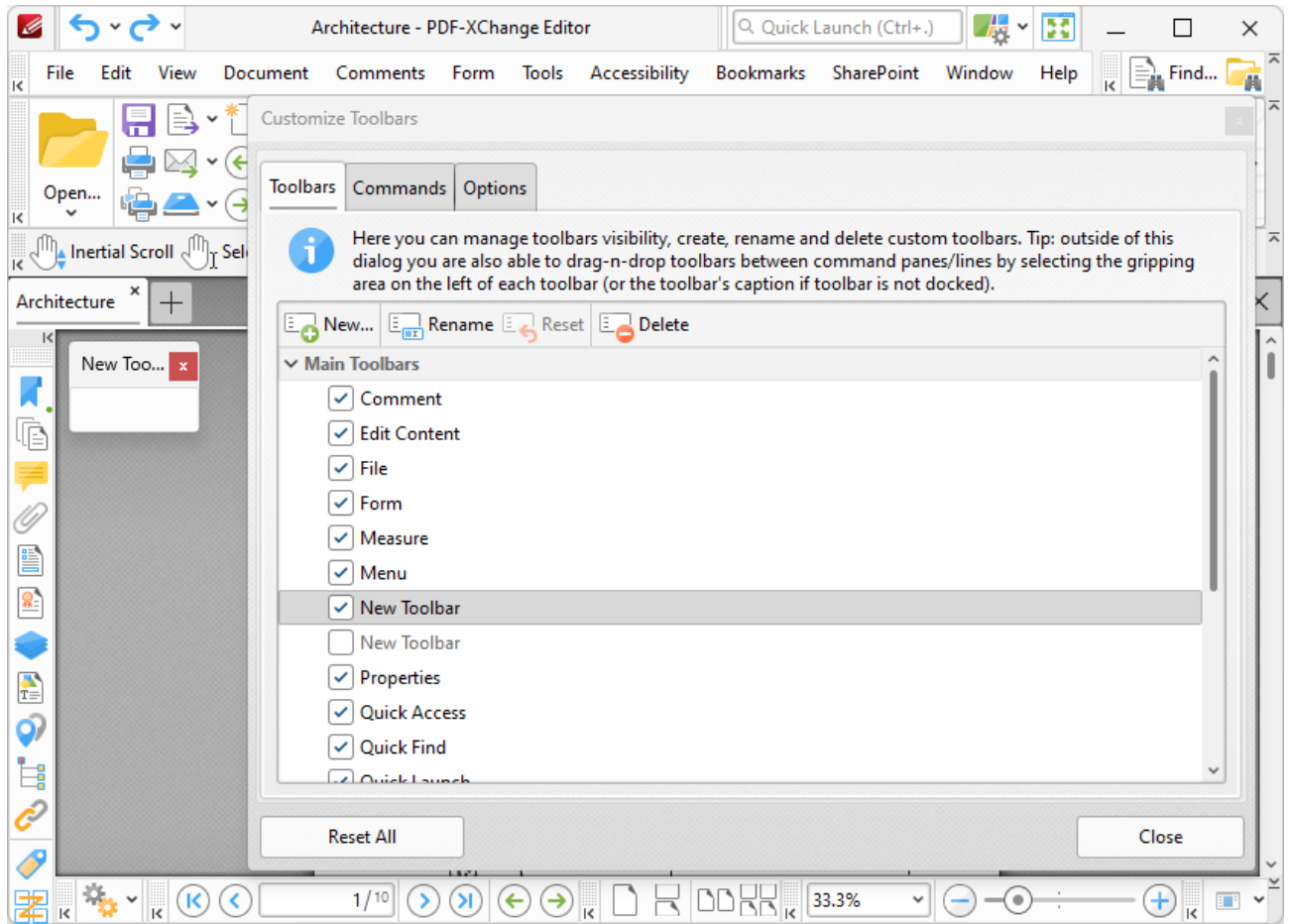
Figure 5. New Toolbar

Click and drag commands from the list of commands to add them to toolbars. A sample new toolbar is detailed below:
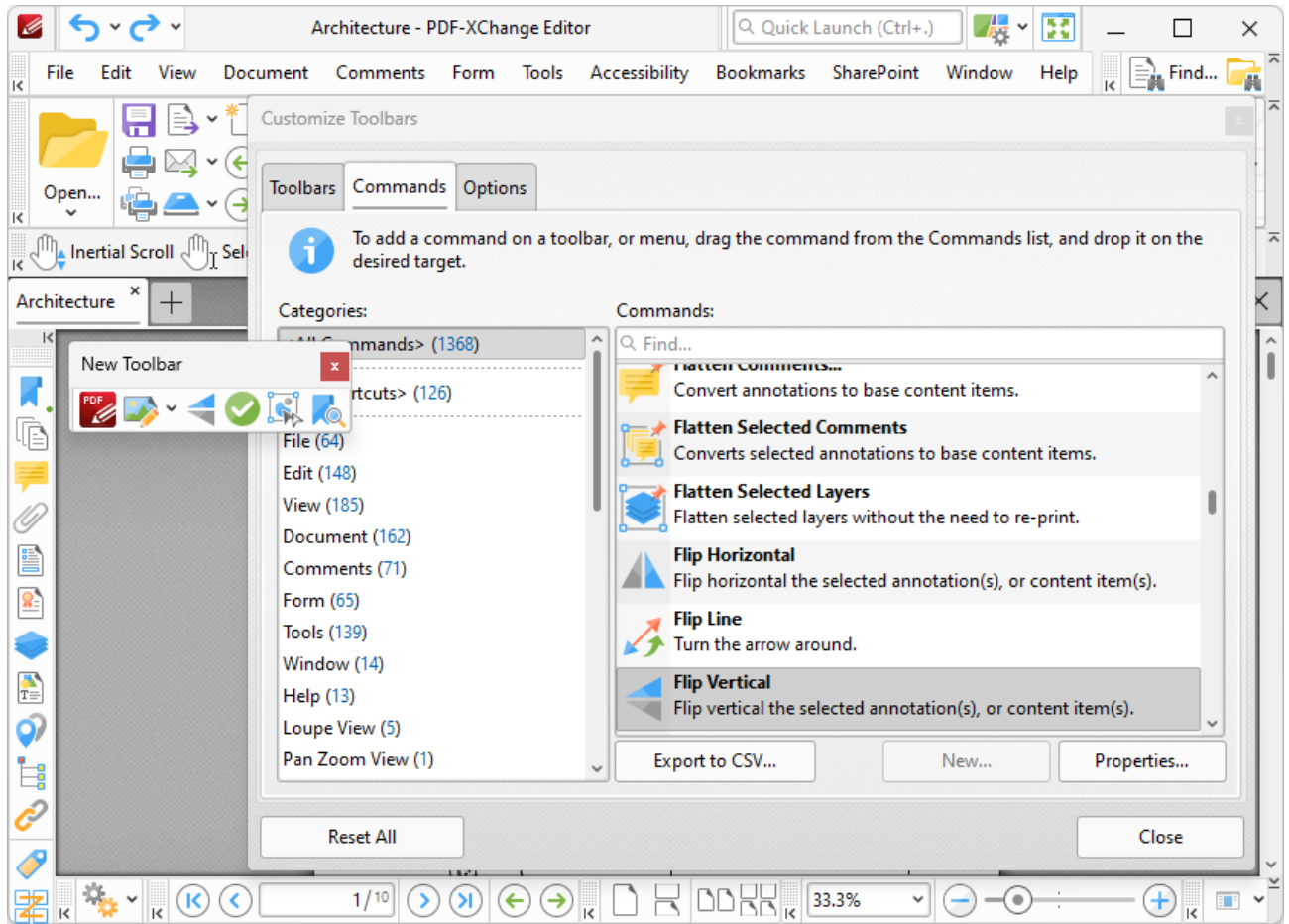
Figure 6. Sample Toolbar

This toolbar contains the following commands:

- **About**
- **Edit Image**
- **Flip Vertical**
- **Finish Editing**
- **Duplicate**
- **Change Bookmarks Zoom Factor**

Click to activate commands. Click and drag toolbars to change their location in the workspace. If toolbars are hovered over compatible areas in the workspace then the icon beneath the pointer will change. This indicates that the toolbar can be docked to the interface. Docked toolbars appear as below:
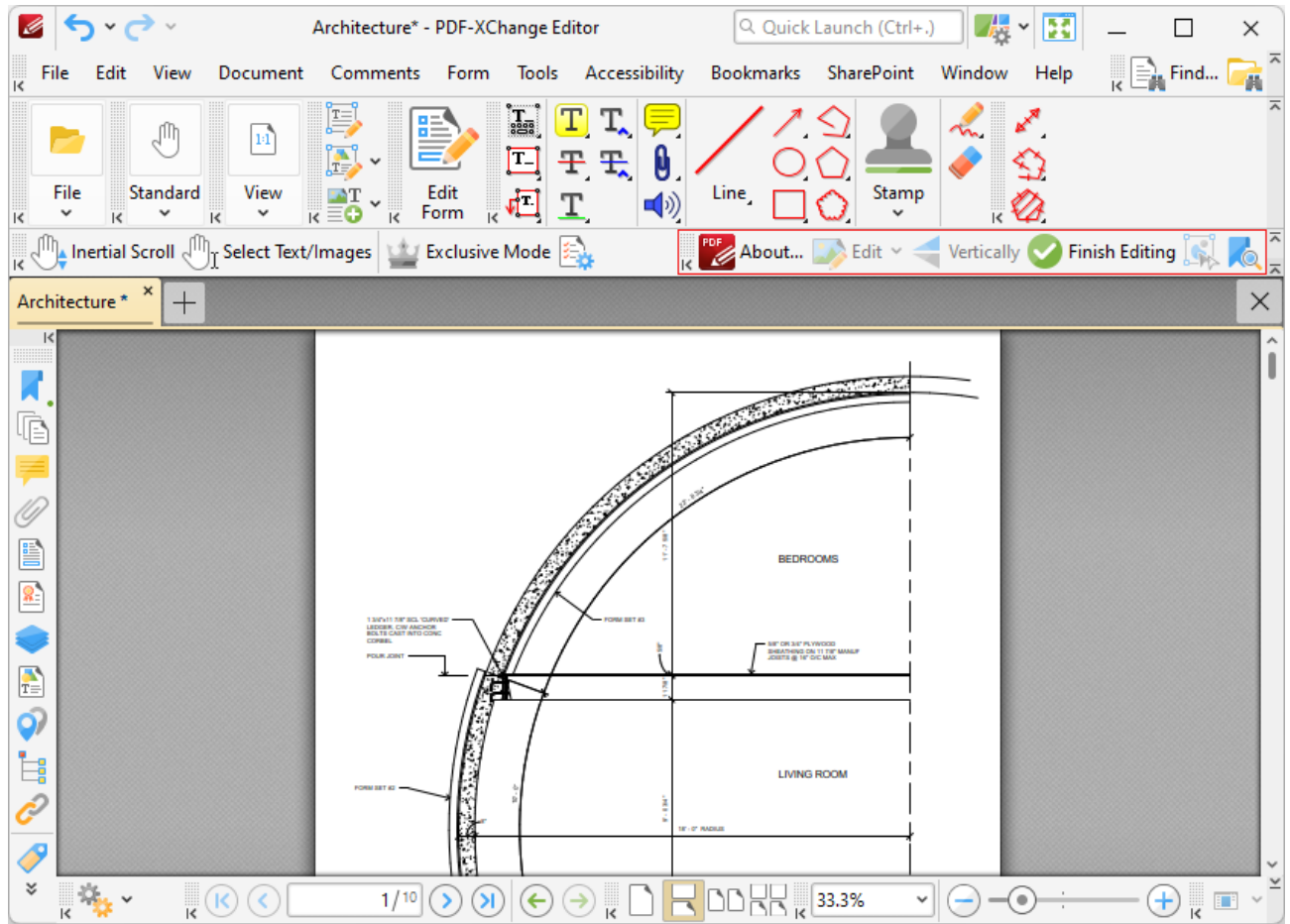
Figure 7. New Toolbar Docked to Main Window

Please note that additional options are available when the **Customize Toolbars** dialog box is open and toolbar items are right-clicked:
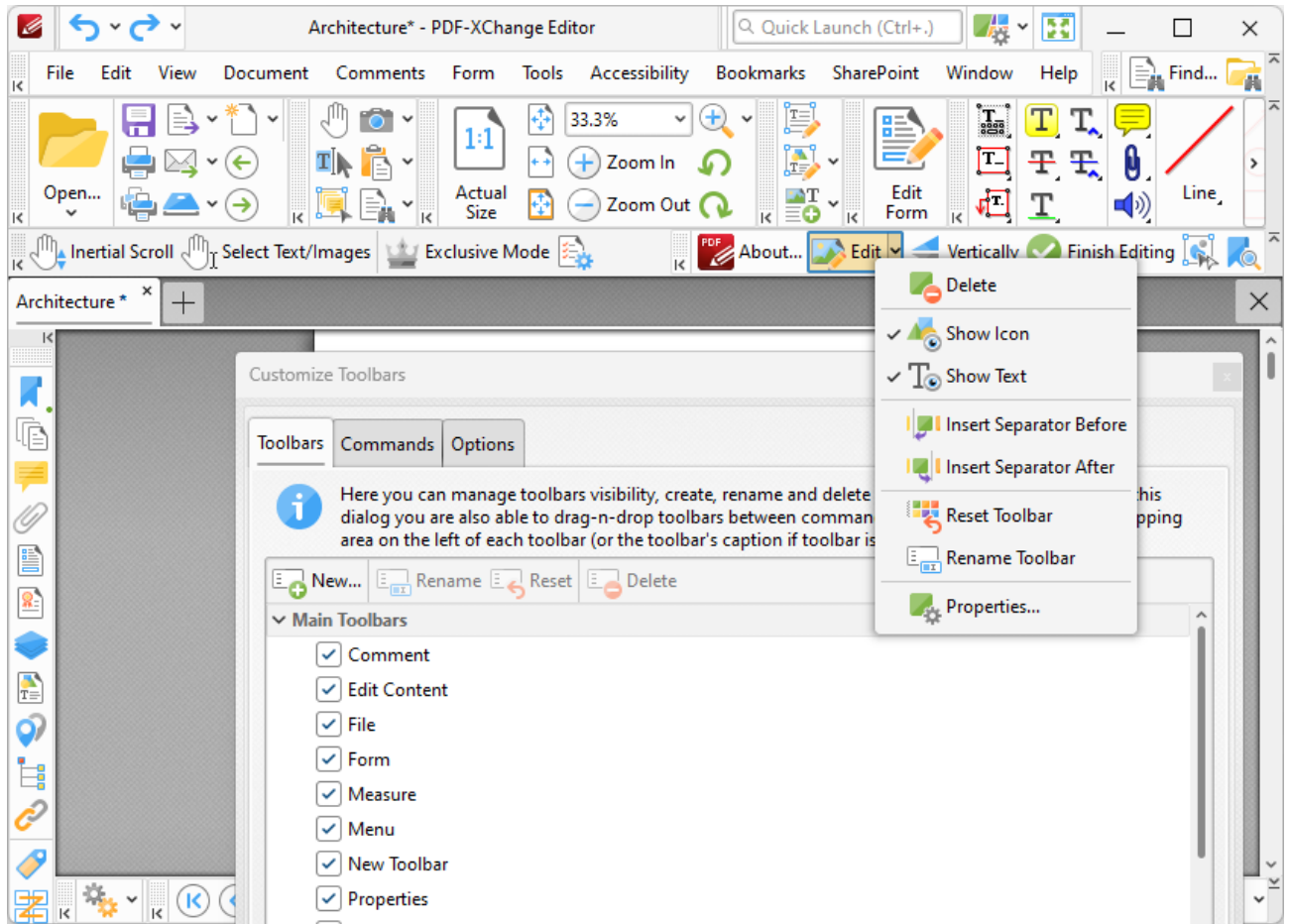
Figure 8. Shortcut Menu for Toolbar Items

- Click **Delete** to remove the selected item from the toolbar.
- Click **Show Icon** to show/hide the icon of the selected item.
- Click **Show Text** to show/hide the text for the selected item.
- Click **Insert Separator Before/After** to insert an item separator before/after the selected item. Separators are used to define areas in which toolbar items can be placed.
- Click **Reset Toolbar** to reset the selected toolbar.
- Click **Rename Toolbar** to rename the selected toolbar.
- Click **Properties** to view/edit the properties of the selected item. Please note that properties are read-only, except for those that relate to the keyboard shortcut for the item. The process of creating/editing keyboard shortcuts is detailed **here.** 1153

Reposition Toolbars

When the **Customize Toolbars** option is enabled in the **PDF-XChange Editor** user interface, you can reposition toolbars as desired in the main window of the application. Simply click and drag the grid of dots on the right side of toolbars to perform this operation:
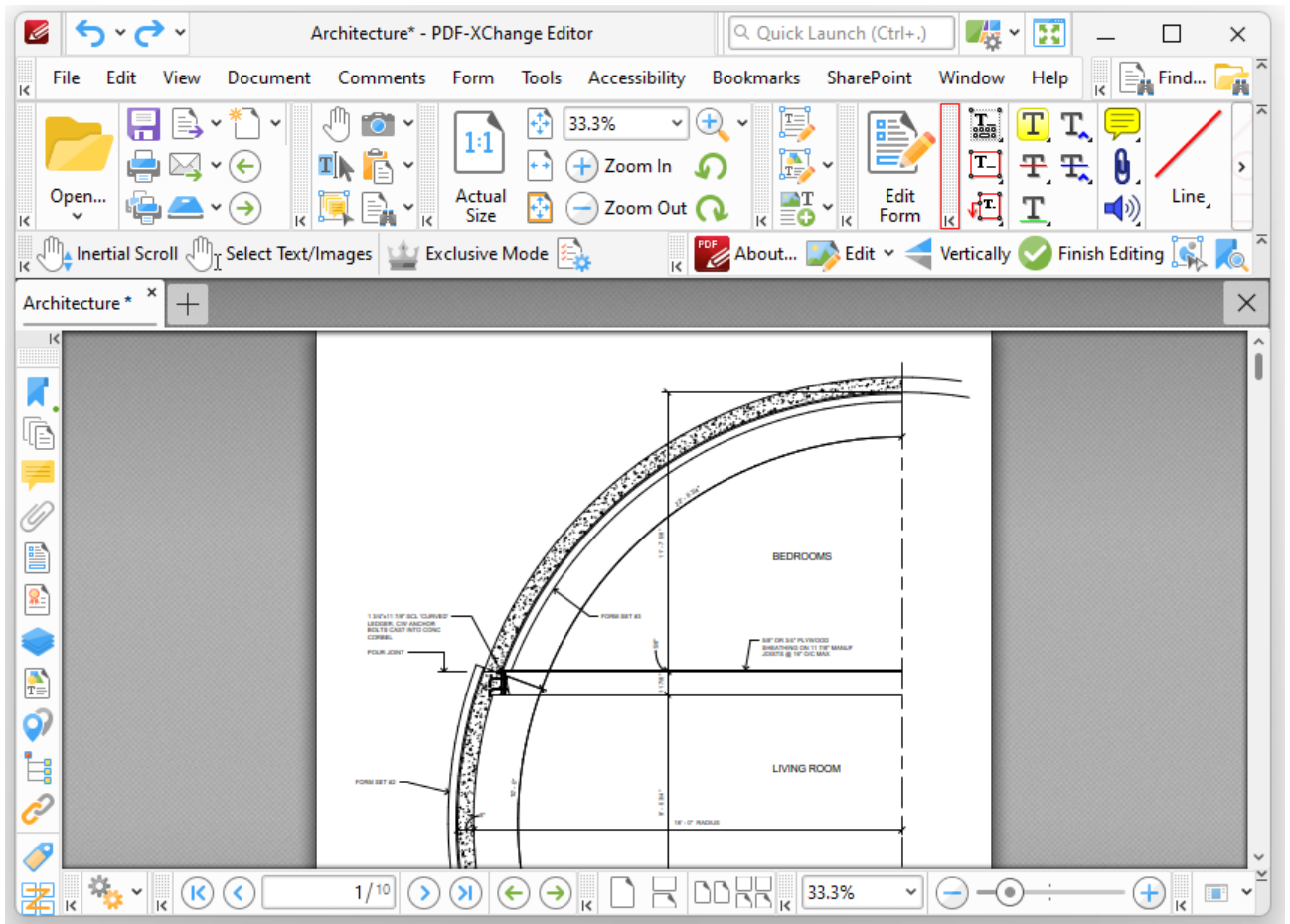
Figure 16. Customize Toolbars, Grid of Dots Highlighted for Comment Toolbar

When you drag the toolbar around the user interface, the blue box that represents it will change shape when it is hovered over a compatible docking location:
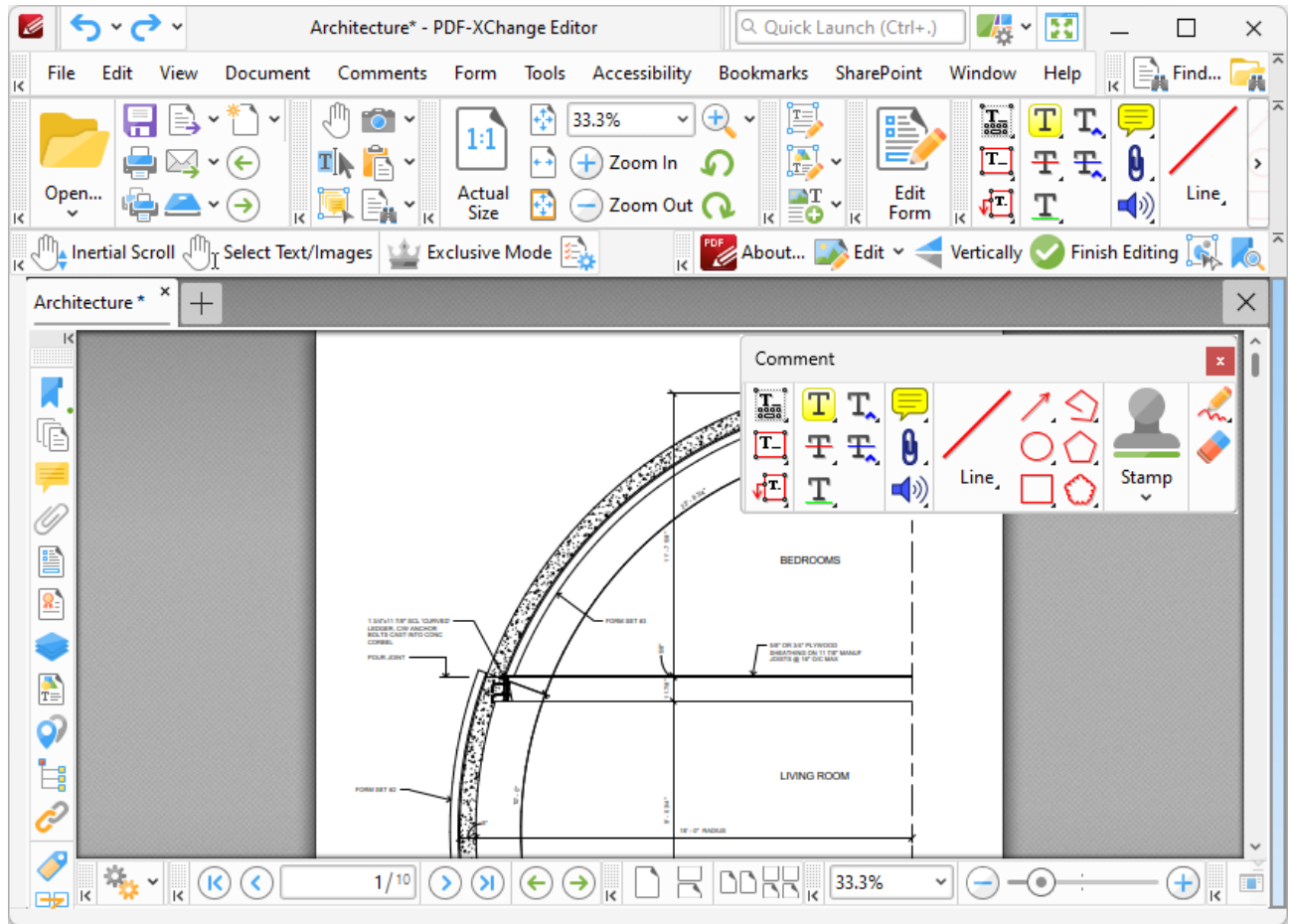
Figure 17. Customize Toolbars, Comment Toolbar Hovered over Compatible Docking Location

Release the mouse to add the toolbar to the new location:

Figure 18. Customize Toolbars, Comment Toolbar Docked on Left Side

5.3.2 **Rotate View**

Rotate View

Hover over **Rotate View** to rotate the current view of the document:

Click **Rotate CW** to rotate the view clockwise. Pages will be rotated ninety degrees each time the icon is clicked.

Click **Rotate CCW** to rotate the view counterclockwise. Pages will be rotated ninety degrees each time the icon is clicked.

Please note that rotations are intended for viewing/editing purposes only and will not be saved. (The settings in the **Thumbnails pane** 510 can be used to rotate pages permanently).

5.3.3 Bookmarks

 Bookmarks

Click **Bookmarks** (or press Ctrl+B) to show/hide the **Bookmarks** pane:
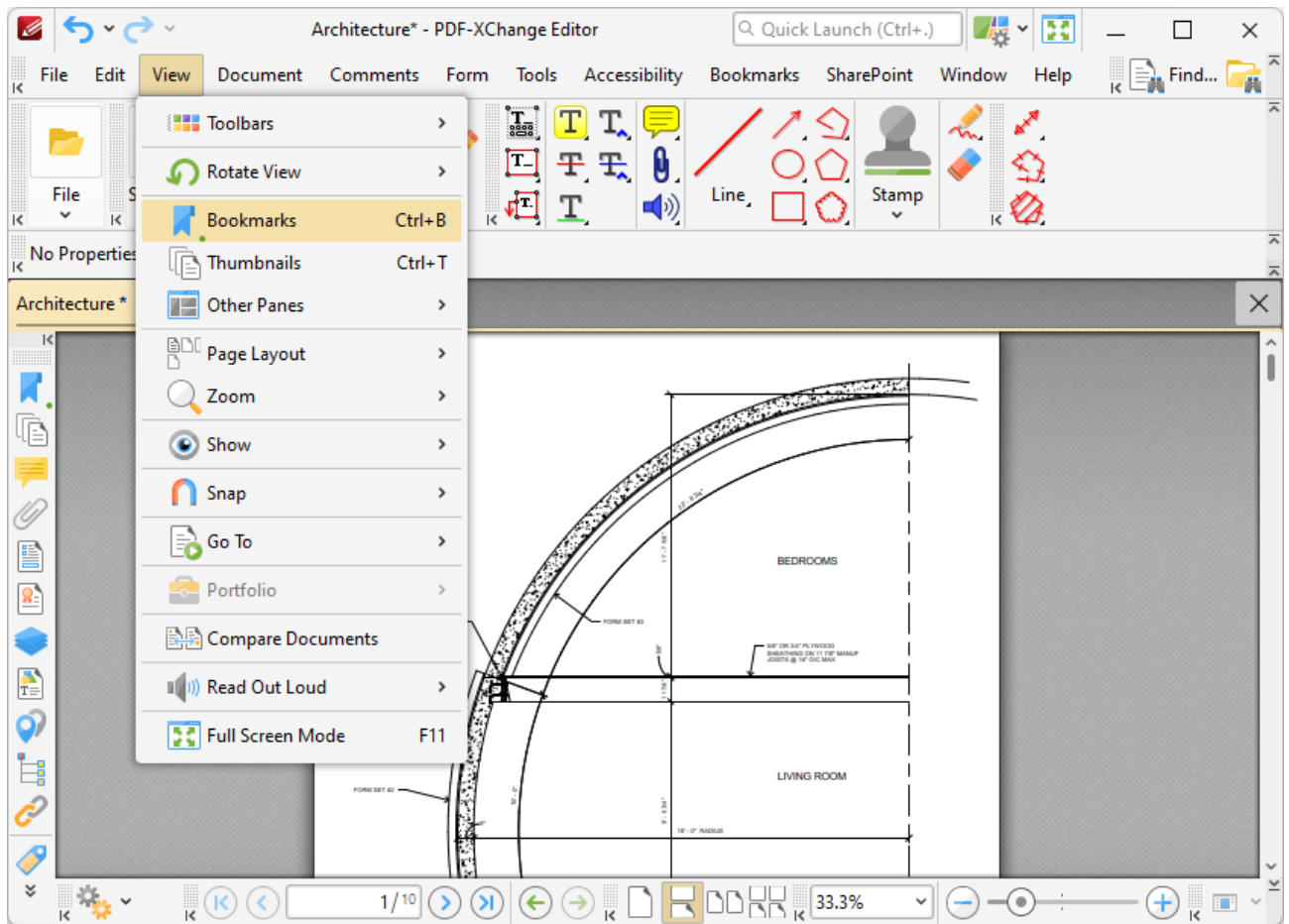
Figure 1. View Tab Submenu, Bookmarks

The **Bookmarks** pane appears as detailed below:
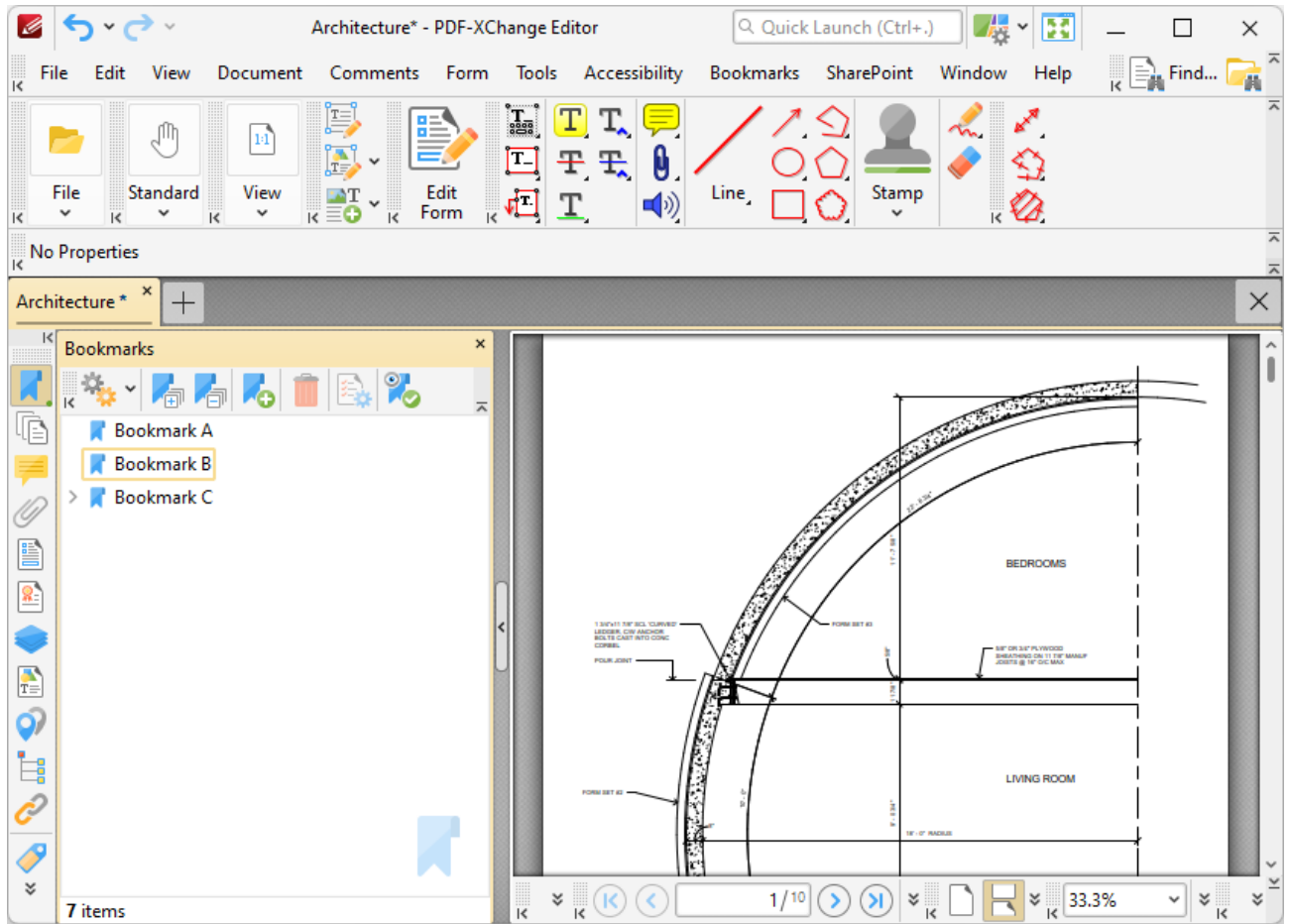
Figure 2. Bookmarks Pane

Bookmarks are used to designate specific places of importance within documents. All bookmarks contained within the active document are displayed in the **Bookmarks** pane. Use the icons in the **Bookmarks** pane to perform the following operations:

Click **Expand All Bookmarks** to expand all bookmarks.

Click **Collapse All Bookmarks** to collapse all bookmarks.

Click **New Bookmark** to create a new bookmark. See **Keyboard Shortcuts** 1141 for available keyboard shortcuts when creating new bookmarks.

Click **Delete** to delete selected bookmarks.

Click **Ensure Visibility of Corresponding Bookmark** to expand parent bookmarks in a manner that ensures the visibility of corresponding bookmarks.

Click **Properties** to view/edit the properties of selected bookmarks. The **Bookmark Properties** pane will open:
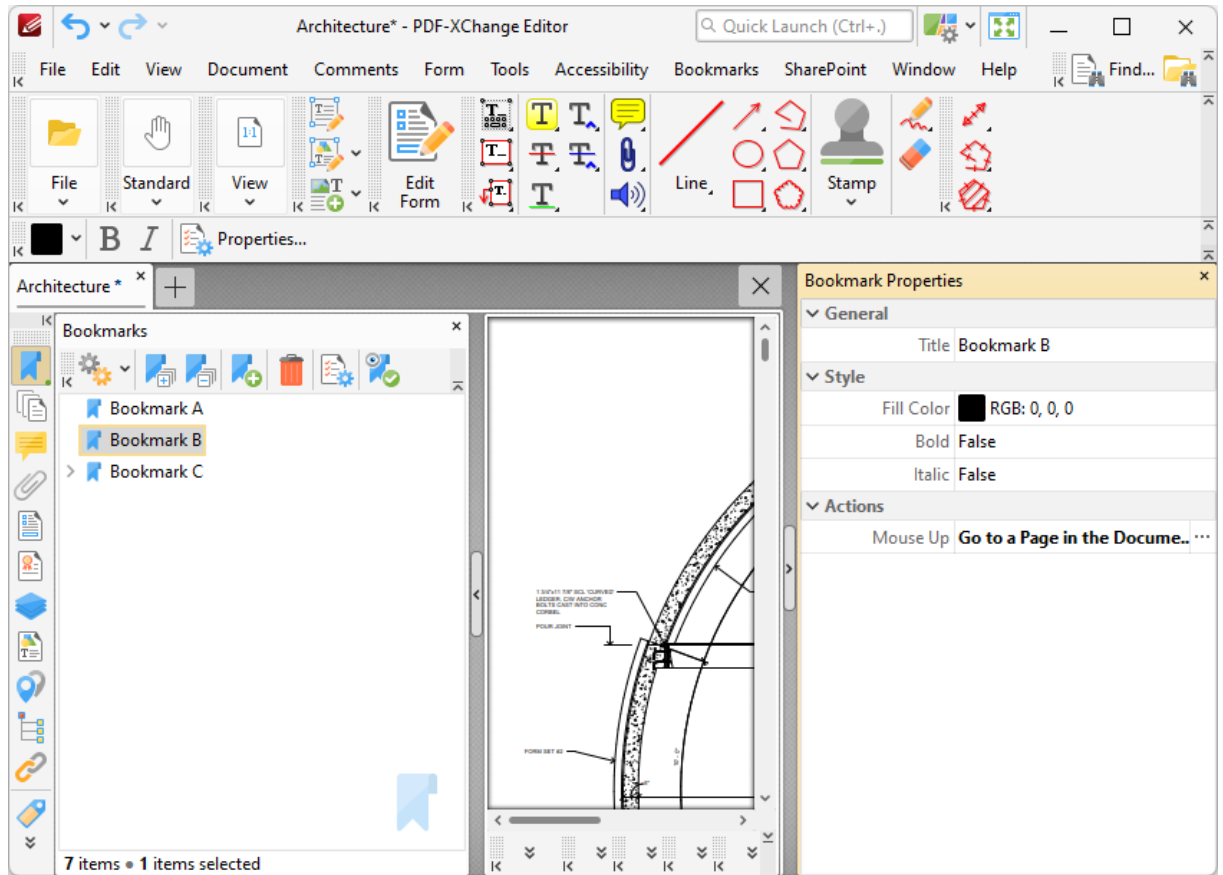
Figure 3. Bookmark Properties Pane

- The **Title** property displays the bookmark title. Click the text to edit the bookmark title.
- The **Fill Color** property displays the color of the bookmark title. Click to edit the color of the bookmark title.
- The **Bold** and **Italic** properties display the parameter values for whether or not the bookmark title is bold or italic. Click values to change the property from **False** to **True** as desired.
- The **Mouse Up** property displays the action performed when the bookmark is clicked. The default action is **Go to a Page in the Document**, which is the standard action that bookmarks perform. However, there are a range of alternative actions available, including the activation of JavaScript, opening of weblinks and execution of **PDF-XChange Editor** commands. A comprehensive list of available actions, and instructions on how to add/edit their parameters, is available **here.** 992

Click ⚙ **Options,** or right-click bookmarks, for bookmark options:

Figure 4. 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** to perform these actions on selected bookmarks. If you have copied text to the clipboard then you can click **Paste as plain text** to create a bookmark that uses the copied text as a bookmark title.
- Click **Expand/Collapse All Bookmarks** to expand/collapse all bookmarks.
- Click **Ensure Visibility of Corresponding Bookmark** to expand parent bookmarks in a manner that ensures the visibility of corresponding bookmarks.
- Click **Automatically Expand Bookmarks** to expand all child bookmarks by default.
- Click **Rename** to rename selected bookmarks.
- Click **Set Destination** to change the location of the selected bookmark to the current view of the active document.
- Click **Set Destination from Selection** to change the location of the selected bookmark to the current selection in the active document.
- Click **Make Current Properties Default** to set the properties of the current bookmark as the default setting for subsequent bookmarks.
- Click **Apply Default Properties** to apply the default bookmark properties to selected bookmarks.
- Hover over **Text Size** to set the font size of bookmark titles, then select either **Small, Medium** or **Large** in the submenu.
- Click **Wrap Long Bookmarks** to fit bookmarks with long names to the dimensions of the **Bookmarks** pane. If this option is not enabled then bookmark titles will be a single line regardless of their length.
- Click **Show/Hide Icons** as desired.
- Hover over **Create Options** to view customizable options for creating bookmarks:
    - Click **Use Inherited Zoom** to retain the current zoom level when bookmarks are clicked. If this option is disabled then the zoom level will change to the level that was current when the bookmark was created.
    - Click **Use Current Page** to use the current page as the destination when bookmarks are created. If this option is not selected then the first visible page after the current page will be used.
    - Click **Use Selected Text as Title** to use selected text as the title for the bookmark in cases where you are creating a bookmark from selected text.
    - Click **Use Selected Region as Destination** to use selected regions as the bookmark destination when you are creating new bookmarks.
- Hover over **Pages** to view options for pages:
    - Click **Print** to print the pages designated to the bookmark and its child bookmarks. The **Print** 179 dialog box will open with the designated pages in the **Page Range** box.
    - Click **Extract** to extract the pages designated to the bookmark and its child bookmarks to a new document. The **Extract Pages** 658 dialog box will open with the designated pages in the **Page Range** box.
    - Click **Select** to select the pages designated to the bookmark and its child bookmarks in the **Thumbnails** 510 pane, which will open with the designated pages selected.

- Click **Remove** to remove the pages designated to the bookmark and its child bookmarks.
- Hover over **Sections** to view options for sections:
    - Click **Print** to print the sections designated to the bookmark and its child bookmarks. The **Print** 179 dialog box will open with the designated sections in the **Page Range** box.
    - Click **Extract** to extract the sections designated to the bookmark and its child bookmarks to a new document. The **Extract Pages** 658 dialog box will open with the designated sections in the **Page Range** box.
    - Click **Select** to select the sections designated to the bookmark and its child bookmarks in the **Thumbnails** 510 pane, which will open with the designated sections selected.
    - Click **Remove** to remove the sections designated to the bookmark and its child bookmarks.
- Click **Import Bookmarks** to import saved bookmarks.
- Click **Export Selected Bookmarks** to export selected bookmarks.
- Click **Export All Bookmarks** to export all bookmarks.
- Click **Show Info Bar** to show/hide the information bar at the bottom of the **Bookmarks** pane.
- Click **Properties** to view/edit the properties of selected bookmarks, as detailed in *(figure 3).*

5.3.4   **Thumbnails**

Thumbnails

Click **Thumbnails** (or press Ctrl+T) to show/hide the **Thumbnails** pane:
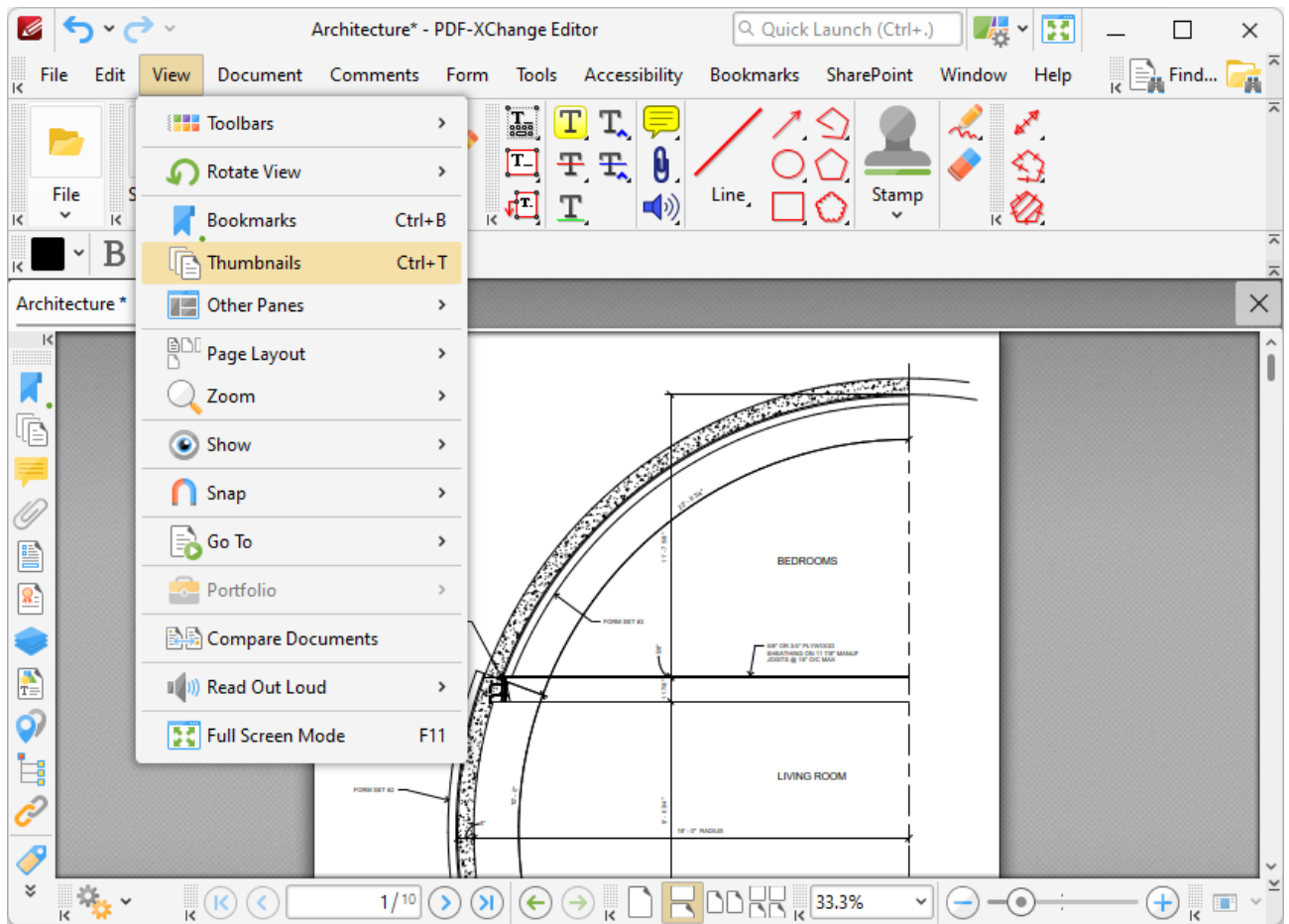
Figure 1. View Tab Submenu, Thumbnails

The **Thumbnails** pane appears as detailed below:
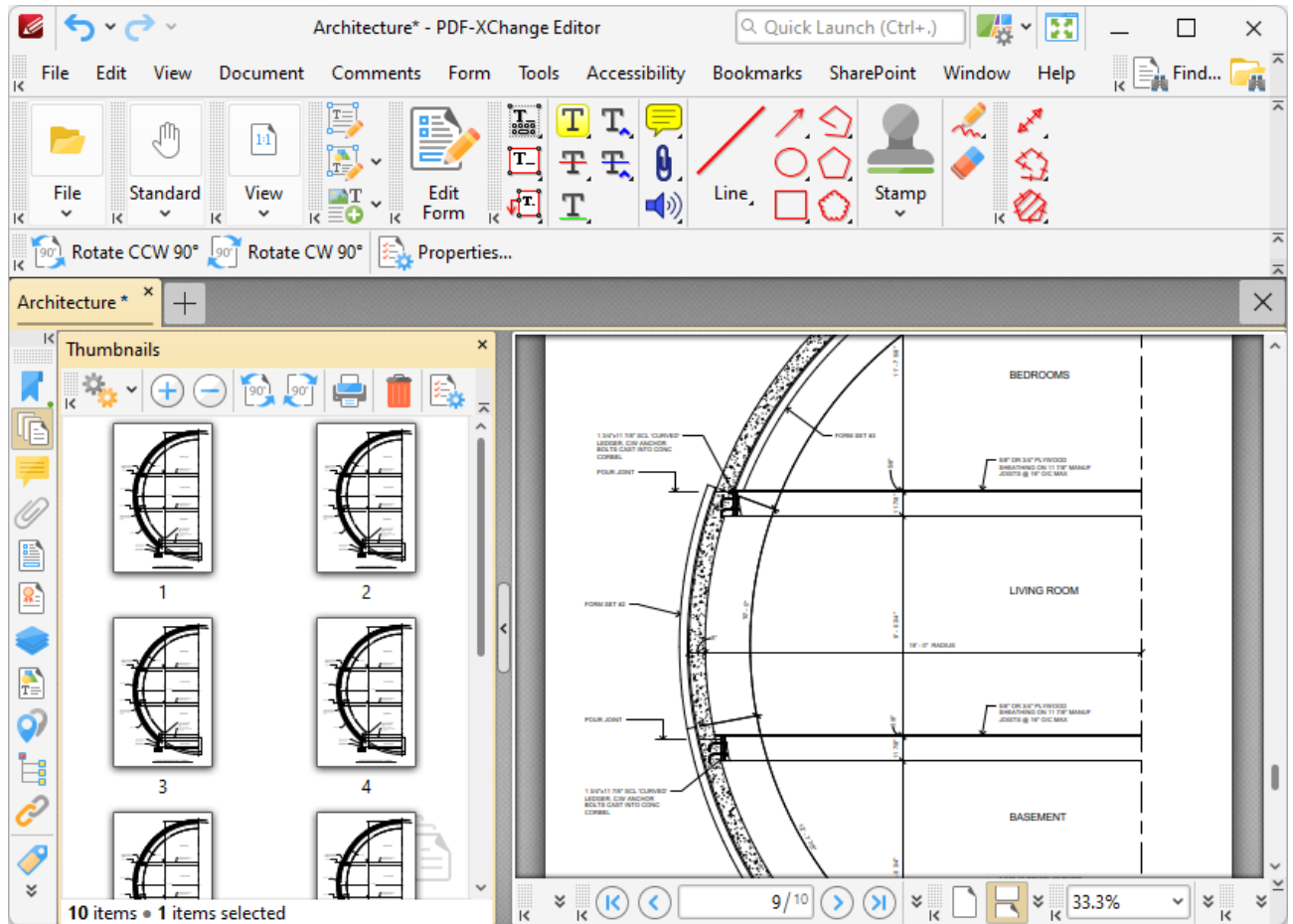
Figure 2. Thumbnails Pane

Thumbnails are a convenient method to view, manage and edit document pages. A smaller representation of document pages is displayed in the **Thumbnails** pane.

- The orange rectangle represents the current page view.
- Click on pages/page locations in the thumbnails pane to move to those locations in the active document.
- Click and drag thumbnail pages to reorder them in the active document.
- Press and hold Ctrl to select multiple pages for group-editing.
- Press Ctrl+A to select all pages in the **Tumbnails** pane.
- The **Thumbnails** pane can be used to create page ranges. Click the first page of the desired range, then press and hold Shift and click the final page of the desired range.
- The **Thumbnails** pane can also be used to copy pages between open documents. Select the desired pages, then right-click and select **Copy** in the submenu. Move to the desired location in the **Thumbnails** pane of the destination document, then right-click and select **Paste** to complete the operation.

Use the icons in the **Thumbnails** pane to perform the following operations:

Click ⊕ **Zoom In** to zoom in on thumbnails.

Click ⊖ **Zoom Out** to zoom out from thumbnails.

Click 🔄 **Rotate Pages CCW 90°** to rotate selected pages ninety degrees counterclockwise.

Click 🔄 **Rotate Pages CW 90°** to rotate selected pages ninety degrees clockwise.

Click 🖨 **Print** to print documents.

Click 🗑 **Delete** to delete selected pages.

Click 📄 **Properties** to view the properties of selected pages. The **Page Properties** pane will open:
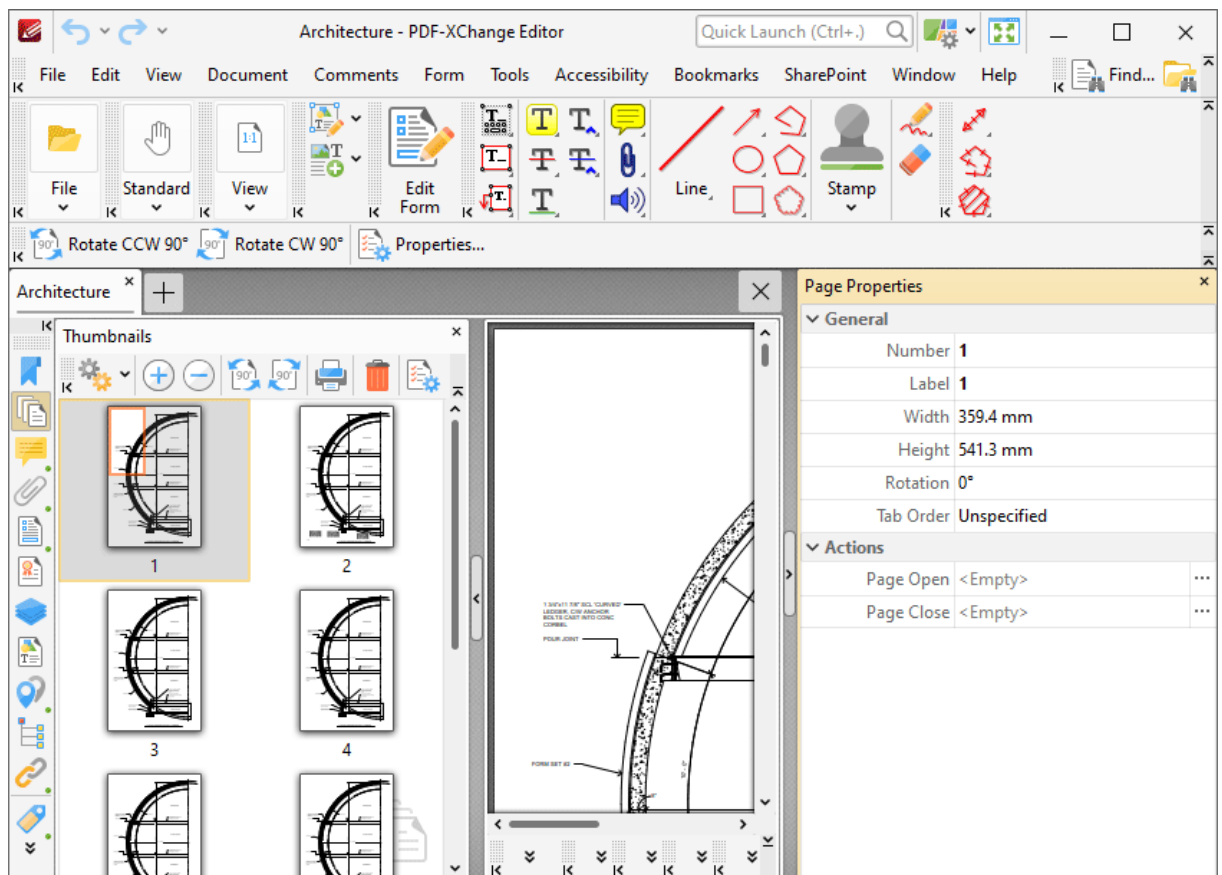
Figure 3. Page Properties Pane

- The **Number** property displays the physical page number of document pages.
- The **Label** property displays the logical page number of document pages. The **Number Pages** [709] feature can be used to edit this property.
- The **Width** and **Height** properties display the physical size of document pages. The **Resize Pages** [684] feature can be used to adjust the size of document pages.
- The **Rotation** property displays the current page rotation. Click the property and then use the dropdown menu to adjust the page rotation as desired.

- The **Tab Order** property displays the designated tab order of pages. This property determines the method used to scroll through page items such as comments, form fields and images. Click the property and select an option from the dropdown menu as desired.
- The **Page Open** and **Page Close** properties enable the activation of custom actions when document pages are opened/closed. Click the ellipsis icon on the right of these properties to add/edit actions. There are a range of actions available, including the activation of JavaScript, opening of weblinks and execution of **PDF-XChange Editor** commands. A comprehensive list of available actions, and instructions on how to add/edit their parameters, is available **here.** 992

Click **Options,** or right-click thumbnails, for thumbnail options:
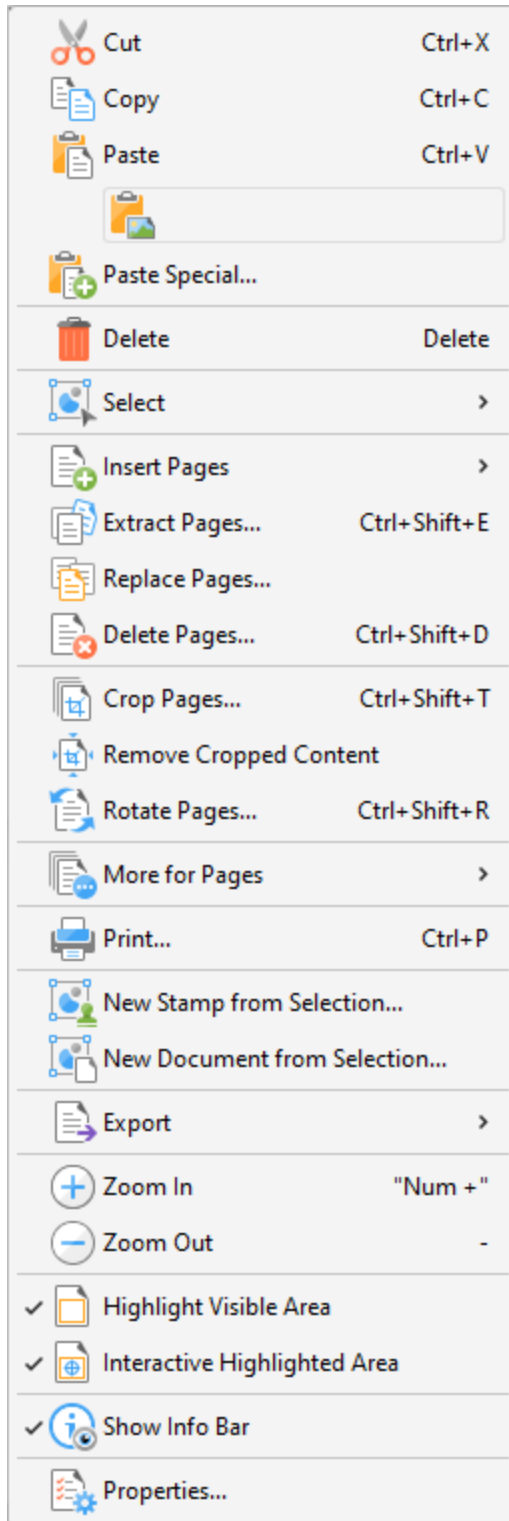
Figure 4. Thumbnails Options

- Click **Cut, Copy, Paste** or **Delete** to perform these actions on selected thumbnails.
- If you have copied content to the clipboard, then it can be used to create a new page via the **Thumbnails** pane. Right-click in the **Thumbnails** pane, then click the special paste options

Paste as Plain Text, Paste as Rich Text or **Paste as Image** as desired. Note that the available paste options depend on the format of the content in the clipboard.
- Click **Select** to select a subset of pages in the **Thumbnails** pane, then select the desired option in the shortcut menu:
    - Click **Select All** to select all pages.
    - Click **Pages with Comments** to select all pages that contain comments.
    - Click **Pages with Links** to select all pages that contain links.
    - Click **Pages with Form Fields** to select all pages that contain form fields.
    - Click **Pages with Bookmarks** to select all pages that contain bookmarks.
    - Click **Pages with Text** to select all pages that contain text.
    - Click **Pages with Images** to select all pages that contain images.
    - Click **Pages with Path Items** to select all pages that contain path items.
    - Click **Pages with Search Results** to select all pages that contain search results returned via the **Search** 217 feature.
    - Click **Pages with...** to select all pages that contain a combination of the options detailed in the **Select** dropdown menu. The **Select Pages With** dialog box will open. Select the boxes of the desired items and then click **OK** to select the corresponding pages.
    - Click **Empty Pages** to select all empty pages.
    - Click **Invert Selection** to invert the current selection of pages in the **Thumbnails** pane.
- Click **Insert Pages** to insert pages at the selected location in the **Thumbnails** pane, as detailed **here.** 648
- Click **Extract Pages** to copy and save selected pages, as detailed **here.** 658
- Click **Replace Pages** to replace selected pages, as detailed **here.** 664
- Click **Delete Pages** to delete selected pages, as detailed **here.** 667
- Click **Crop Pages** to crop selected pages, as detailed **here.** 674
- Click **Remove Cropped Content** to remove cropped content from documents. This feature is intended for use in conjunction with the **Crop Pages** feature. Cropping pages reduces the visible page area, but cropped content remains available (and takes up memory) unless this option is also used.
- Click **Rotate Pages** to view the **Rotate Pages** options, which are explained **here.** 678
- Click **More for Pages** to view/select further options for pages:
    - Click **Duplicate Pages** 682 to duplicate pages.
    - Click **Resize Pages** 684 to resize pages.
    - Click **Split Pages** 661 to split pages.
    - Click **Merge Pages** 694 to merge pages
    - Click **Swap Pages** 697 to swap the location of two pages.
    - Click **Move Pages** 699 to move the location of pages.
    - Click **Page Transitions** 707 to change the manner in which documents browse between pages in fullscreen mode.
    - Click **Number Pages** 709 to number document pages and create number ranges.
- Click **Print** to print documents, as detailed **here.** 179
- Click **New Stamp from Selection** to create a new stamp from selected thumbnails, as detailed **here.** 943

- Click **New Document from Selection** to create a new document from selected thumbnails.
- Click **Export** to view export options:
  - Click **Export to Image(s)** to convert selected thumbnails into images. The **Export to Image(s)** dialog box will open. See **here** 166 for further information.
  - Click **Export selection to Microsoft Word Document** to convert and save selected thumbnails in **(*.docx)** format.
  - Click **Export selection to Microsoft Excel** to convert and save selected thumbnails in **(*.xlsx)** format.
  - Click **Export selection to Microsoft Powerpoint Presentation** to convert and save selected thumbnails in **(*.pptx)** format.
- Click **Zoom In** to zoom in on the thumbnails pane.
- Click **Zoom Out** to zoom out from 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 corresponding page of the **Thumbnails** pane. Disable this option to remove the highlight box.
- **Interactive Highlighted Area** is selected by default. This means it is possible to click and drag the **Highlight Visible Area** detailed above to adjust the page view in the main window. Click and drag the ⊕ icon to adjust the page view.
- Click **Show Info Bar** to enable/disable the display of the information bar at the bottom of the **Thumbnails** pane.
- Click **Properties** to launch the **Properties** pane for selected pages. This pane is detailed beneath *(figure 3)* above.

5.3.5   Other Panes

Other Panes

Hover over **Other Panes** to view/select additional panes in **PDF-XChange Editor** that can be used for editing purposes:
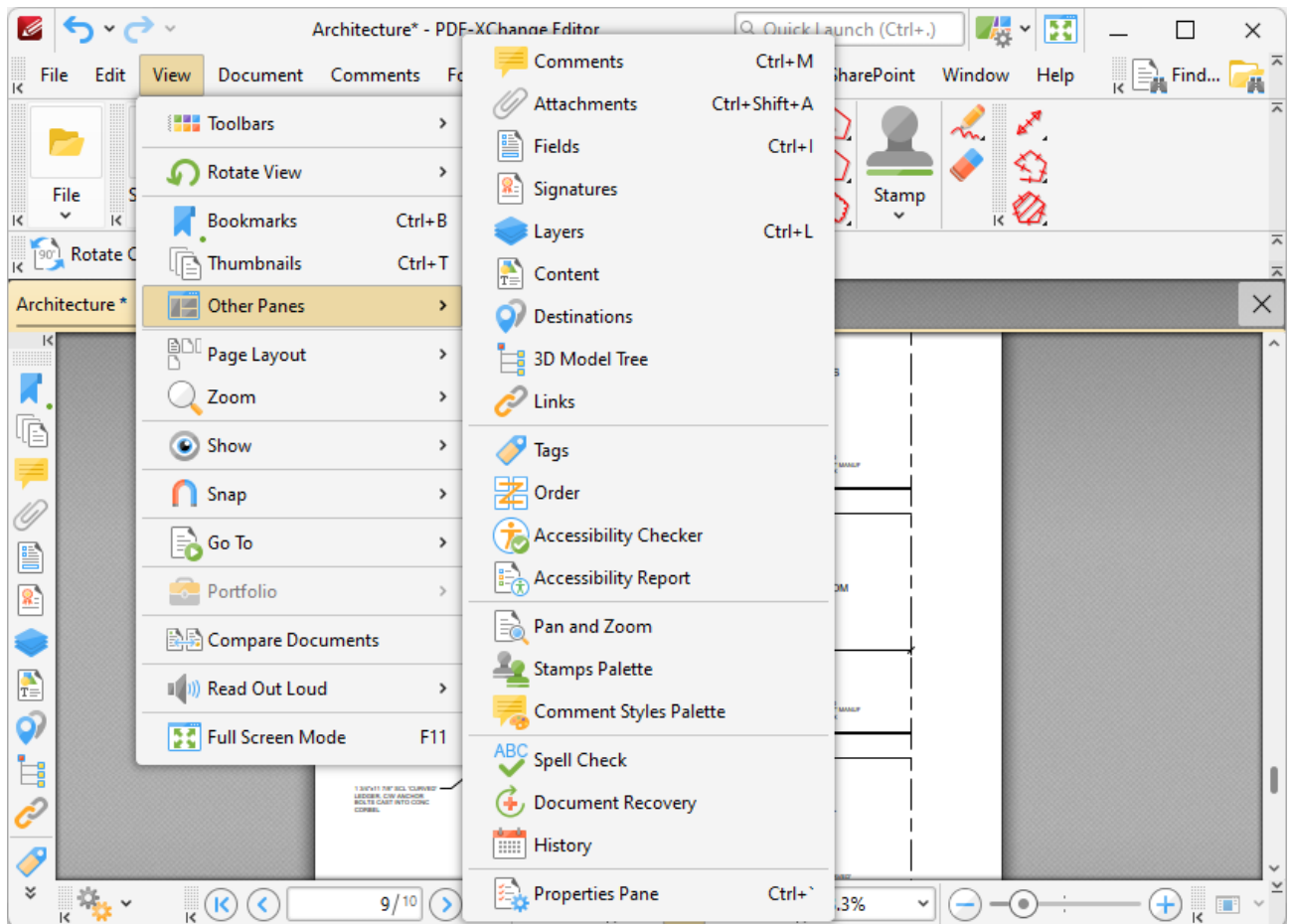
Figure 1. View Tab Submenu, Other Panes

- Click **Comments** 519 to open the **Comments** pane, which is used to view/edit comments, annotations and markups.
- Click **Attachments** 524 to open the **Attachments** pane, which is used to view/edit attachments.

- Click **Fields** 527 to open the **Fields** pane, which is used to view/edit form fields such as radio buttons and dropdown menus.
- Click **Signatures** 532 to open the **Signatures** pane, which is used to view/edit digital signatures.
- Click **Layers** 535 to open the **Layers** pane, which is used to view/edit document layers, such as those used by **InDesign, AutoCAD** and **Visio.**
- Click **Content** 548 to open the **Content** pane, which is used to view/edit base content.
- Click **Destinations** 553 to open the **Named Destinations** pane, which is used to view/edit named destinations.
- Click **3D Model Tree** 561 to open the **3D Model Tree** pane, which displays the hierarchy of selected 3D content in documents.
- Click **Links** 565 to open the **Links** pane, which displays the links in documents.
- Click **Tags** 569 to open the **Tags** pane, which displays all tags in the document structure and can be used to create new or edit existing tags.
- Click **Order** 574 to open the **Order** pane, which displays the current document order and can be used to reorder and re-tag structured document information.
- Click **Accessibility Checker** 579 to open the **Accessibility Checker** pane, which details accessibility check information about the current document, and can be used to view a breakdown of specific document components and repair accessibility errors.
- Click **Accessibility Report** 582 to open the **Accessibility Report** pane, which displays accessibility reports after an accessibility check has been performed. It details the results for all accessibility rules and offers hints on how any issues can be resolved.
- Click **Pan and Zoom** 584 to open the **Pan and Zoom** pane, which assists in document editing.
- Click **Stamps Palette** 588 to open the **Stamps Palette** pane, which is used to view/edit stamps.
- Click **Comment Styles Palette** 791 to open the **Comment Styles Palette**, which is used to view/edit comment styles.
- Click **Spell Check** 596 to open the **Spell Check** pane, which is used to check document spelling.
- Click **Document Recovery** 598 to open the **Document Recovery** pane, which is used to view/edit information recovered through the autosave/autorecovery features.
- Click **History** 600 to open the **History** pane, which displays the history of documents opened in **PDF-XChange Editor** and can be used to browse/open those documents.
- Click **Properties Pane** 213 to open the **Properties** pane, which is used to view/edit the properties of selected document content.

5.3.5.1 **Comments**

Comments

Click **Comments** to open the **Comments** pane:
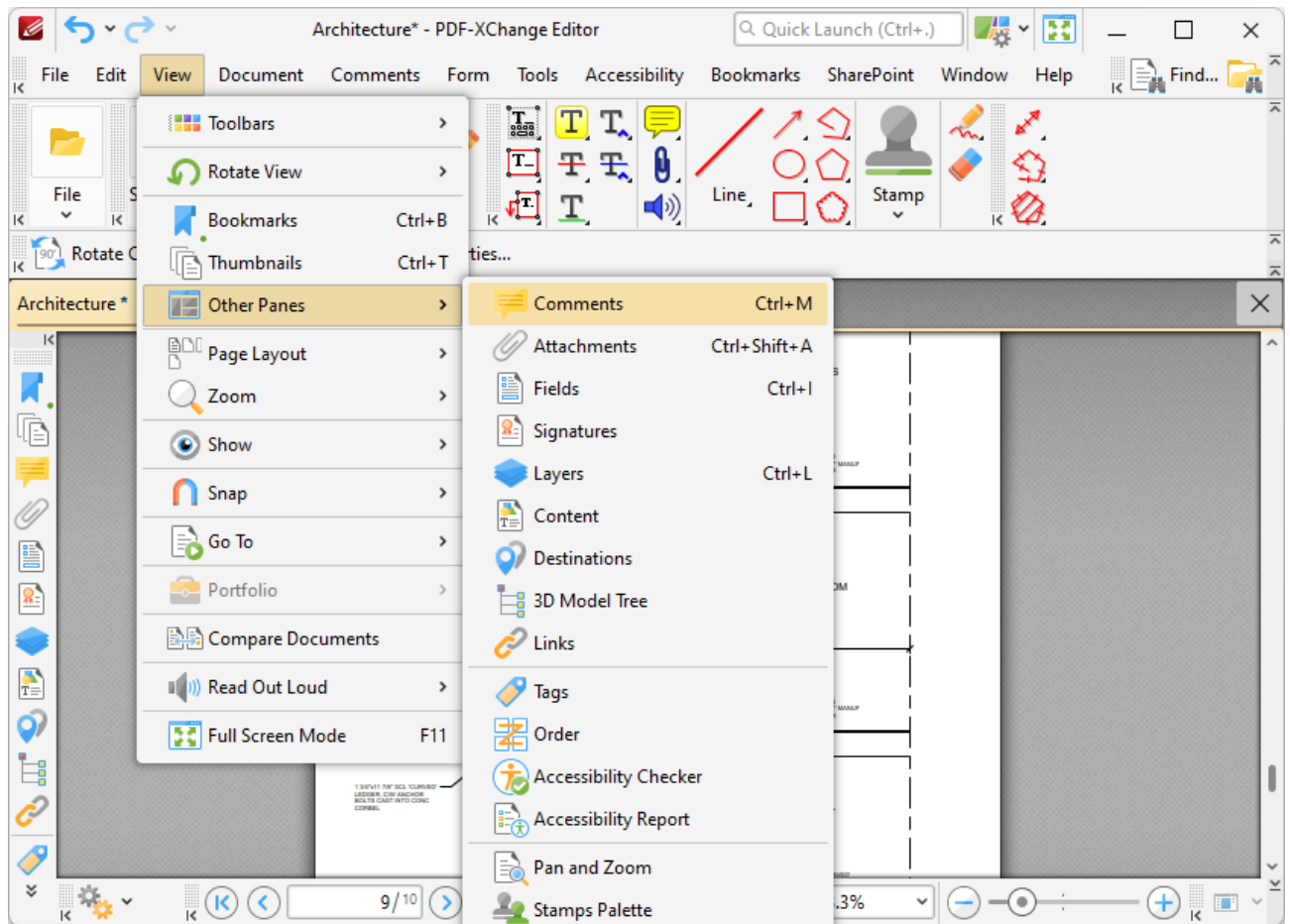
Figure 1. View Tab Submenu, Other Panes, Comments

The **Comments** pane displays a list of comments, annotations and markups in the active document:
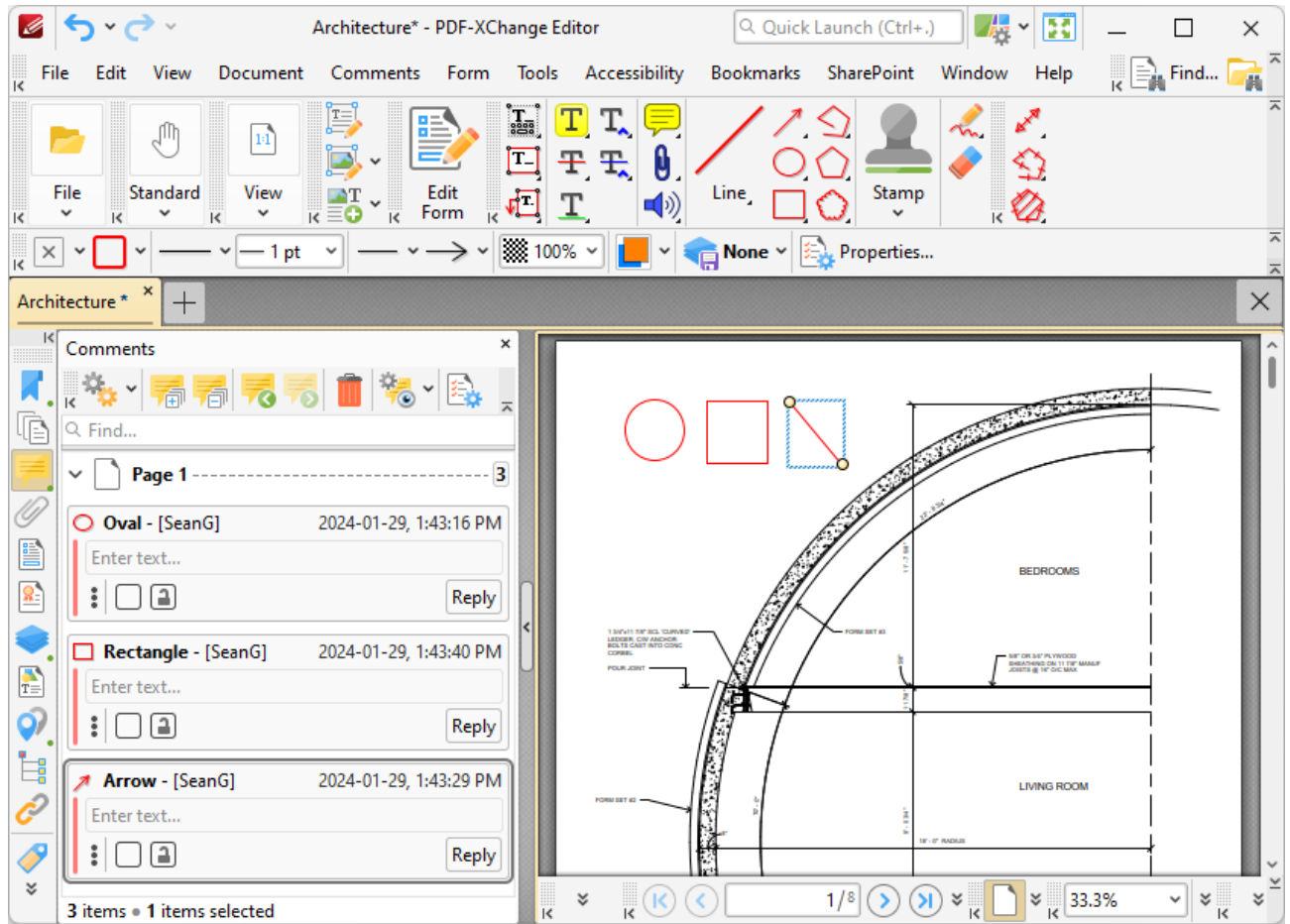
Figure 2. Comments Pane

Click items in the **Comments** pane to move to their location in the document. You can use the lock/unlock and reply buttons to lock/unlock and reply to comments. Use the icons in the **Comments** pane to perform the following operations:

Click **Next Comment** to move to the next comment.

Click **Previous Comment** to move to the previous comment.

Click **Add Reply** to add a reply to the selected annotation. Replies appear in the pop-up note of annotations, and are useful for the editing process of documents.

Click **Summarize Comments** to create a summary of comments in the document, as detailed **here.** 777

Click **Delete** to delete selected comments.

Click **Show** to determine the content displayed with comments, and the manner in which comments are displayed.

Click ⬛ **Properties** to view/edit the properties of selected annotations. The **Properties** pane will open:
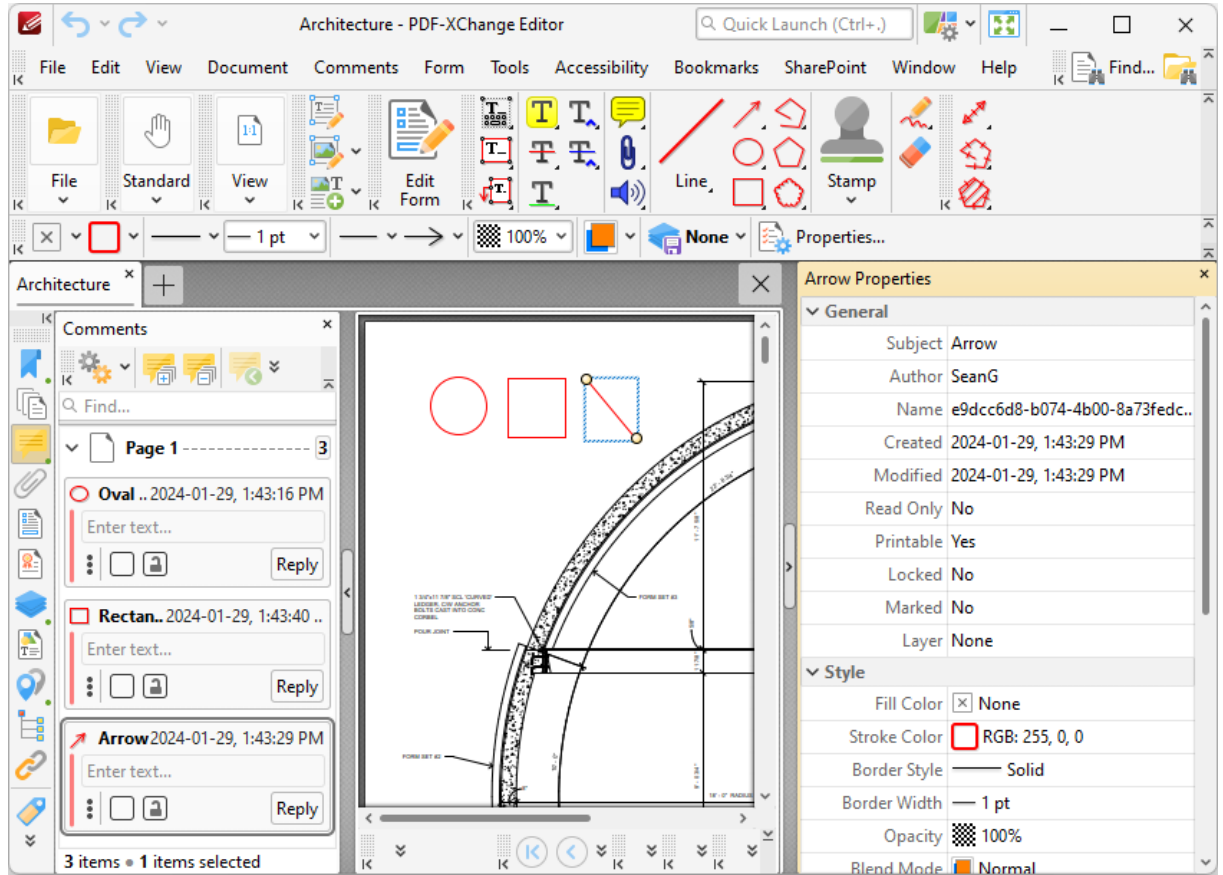
Figure 3. Properties Pane

Click to edit properties as desired. Please note that the properties available depend on the the type of annotation selected, and not all properties are editable. Definitions and functions of properties are available on the **Tools** pages, which are detailed **here.** [803]

Click ⬛ **Options** for comment options:
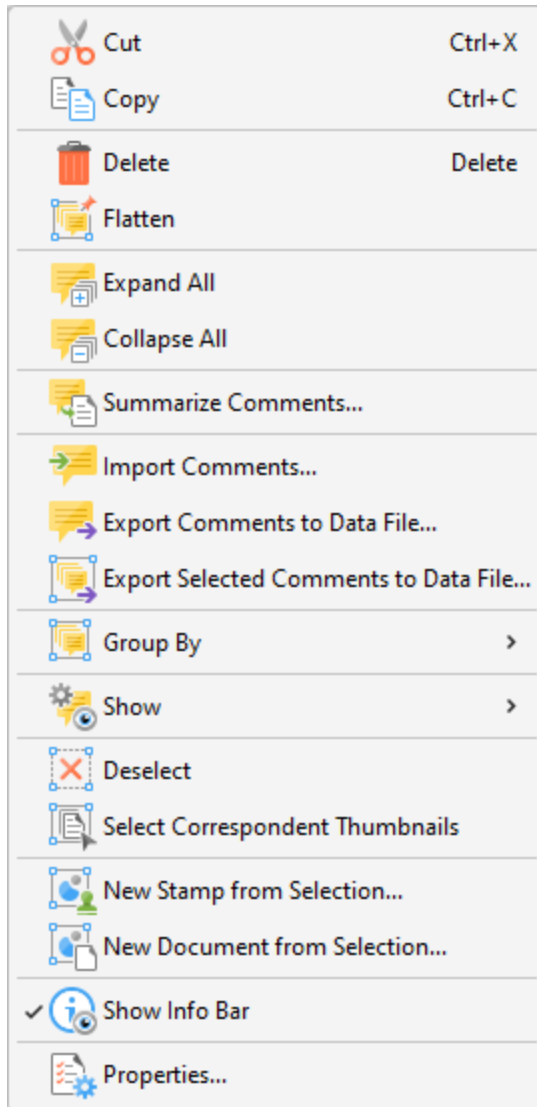
Figure 4. Comments Options

- Click **Cut, Copy, Delete** or **Flatten** to perform these operations on comments.
- Click **Expand All/Collapse All** to expand/collapse all comments.
- Click **Summarize Comments** to create a summary of comments, as detailed **here.** 777
- Click **Import Comments** to import comments from file, as detailed **here.** 784
- Click **Export Comments to Data File** to export comments, as detailed **here.** 786
- Click **Export Selected Comments to Data File** to export a summary of selected comments to file, as detailed **here.** 786
- Click **Group By** to determine how comments are grouped, then select **Page, Type, Modification Date, Creation Date, Author, Color, Subject, Status, Status and Author** or **Author of Last Status** to determine how comments are grouped.
- Use the **Show** options to determine the information displayed with comments in the **Comments** pane.
- Click **Deselect** to deselect selected comments.

- Click **Select Correspondent Thumbnails** to select the corresponding thumbnails of selected comments in the **Thumbnails** pane.
- Click **New Stamp from Selection** to create a new stamp from selected comments, as detailed **here.** 943
- Click **New Document from Selection** to create a new document from selected comments.
- Click **Show Info Bar** to show/hide the information bar at the bottom of the **Comments** pane.
- Click **Properties** to view/edit the properties of selected comments, as detailed above.

5.3.5.2   Attachments

Attachments

Click **Attachments** to open the **Attachments** pane:
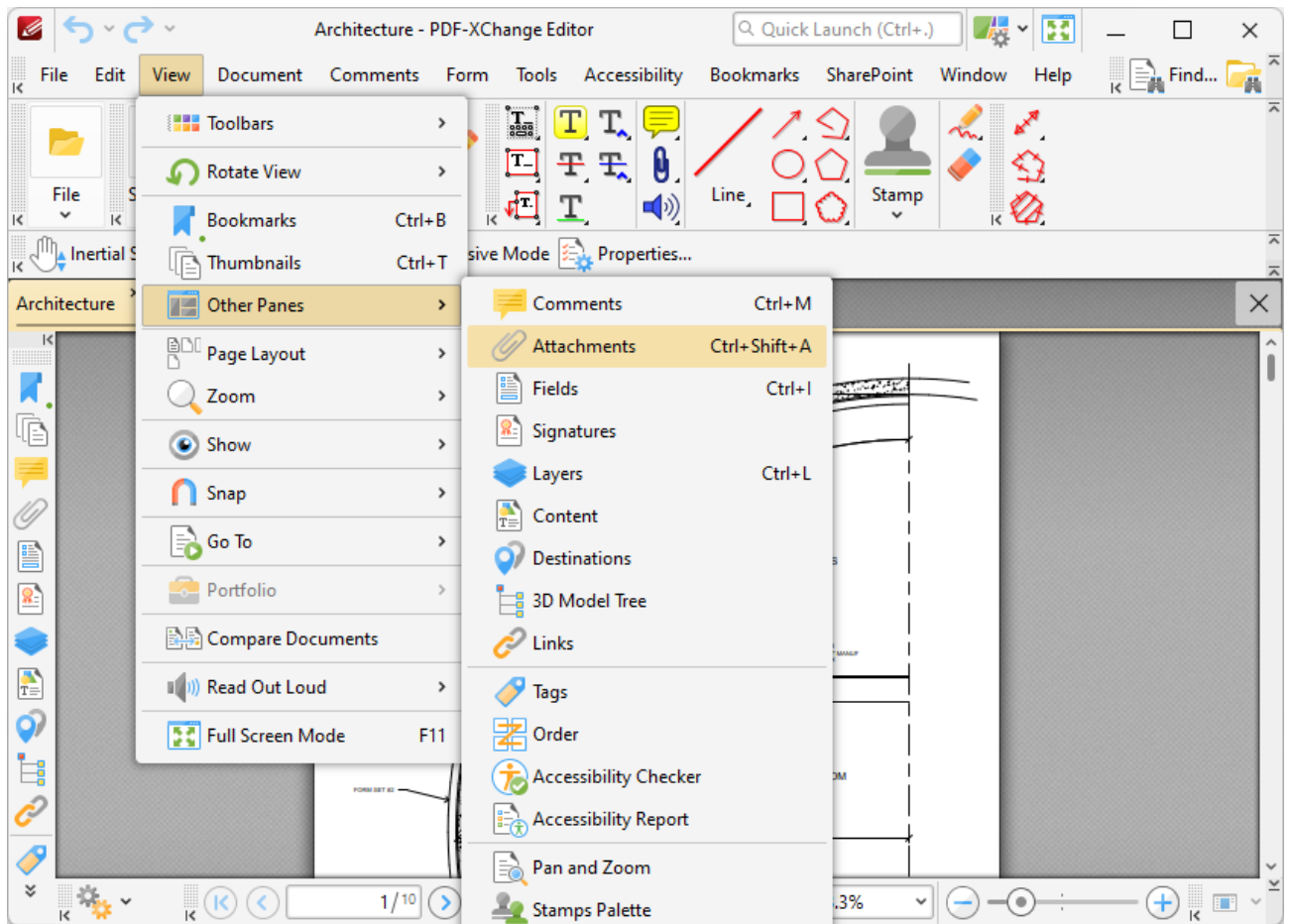
Figure 1. View Tab Submenu, Other Panes, Attachments

The **Attachments** pane details current document attachments and facilitates the creation/editing/removal of attachments:
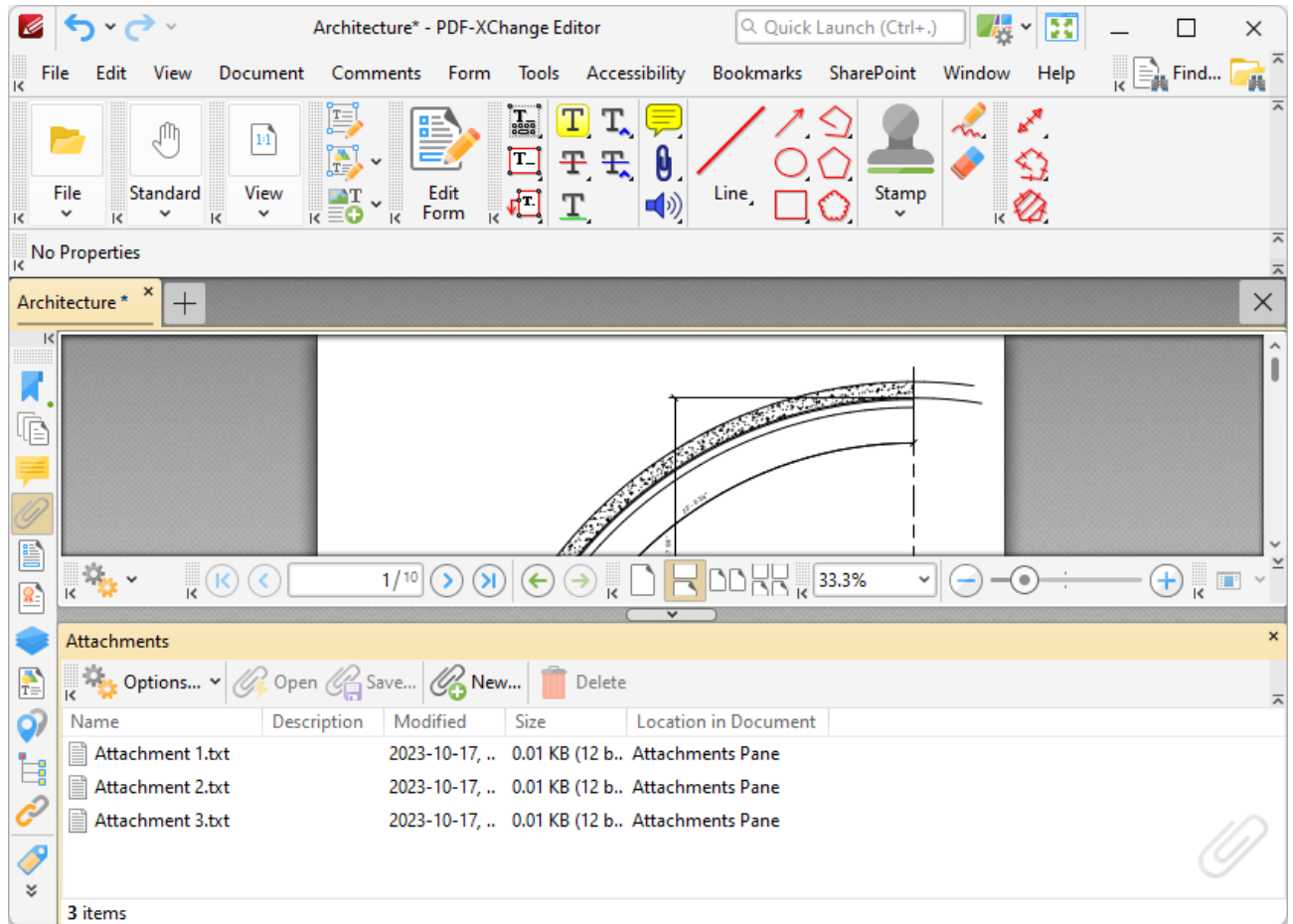
Figure 2. Attachments Pane

Double-click to open attachments. Use the icons in the **Attachments** pane to perform the following operations:

> Click **Open** to open attachments in their default applications.
> Click **Save** to save selected attachments.
> Click **New** to add new attachments to documents. The **Open Files** dialog box will open. Select the desired files and click **Open** to add them as attachments. Alternatively, click and drag documents into the **Attachments** pane.
> Click **Delete** to delete selected attachments.

Click **Options** for additional attachment options:
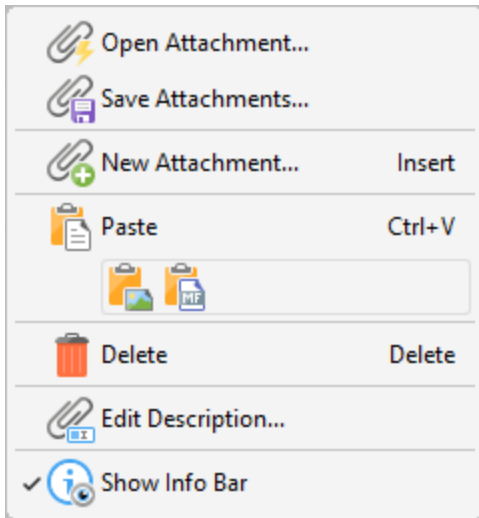
Figure 3. Attachment Options

- Click **Open Attachment** to open selected attachments.
- Click **Save Attachment** to save selected attachments to an external file.
- Click **New Attachment** to add a new attachment to the current document.
- Click **Paste** to paste the current clipboard content as a new attachment to the current document.
- Click **Delete** to delete selected attachments.
- Click **Edit Description** to edit the description of selected attachments in the **Attachments** pane.
- Click **Show Info Bar** to show/hide the info bar at the bottom of the **Attachments** pane.

If you have copied content to the clipboard, then it can be used to create a new attachment. Right-click in the **Attachments** pane, then click the special paste options **Paste as Plain Text, Paste as Rich Text** or **Paste as Image** as desired. Note that the available paste options depend on the format of the content in the clipboard.

5.3.5.3 Fields

Fields

Click **Fields** to open the **Fields** pane:
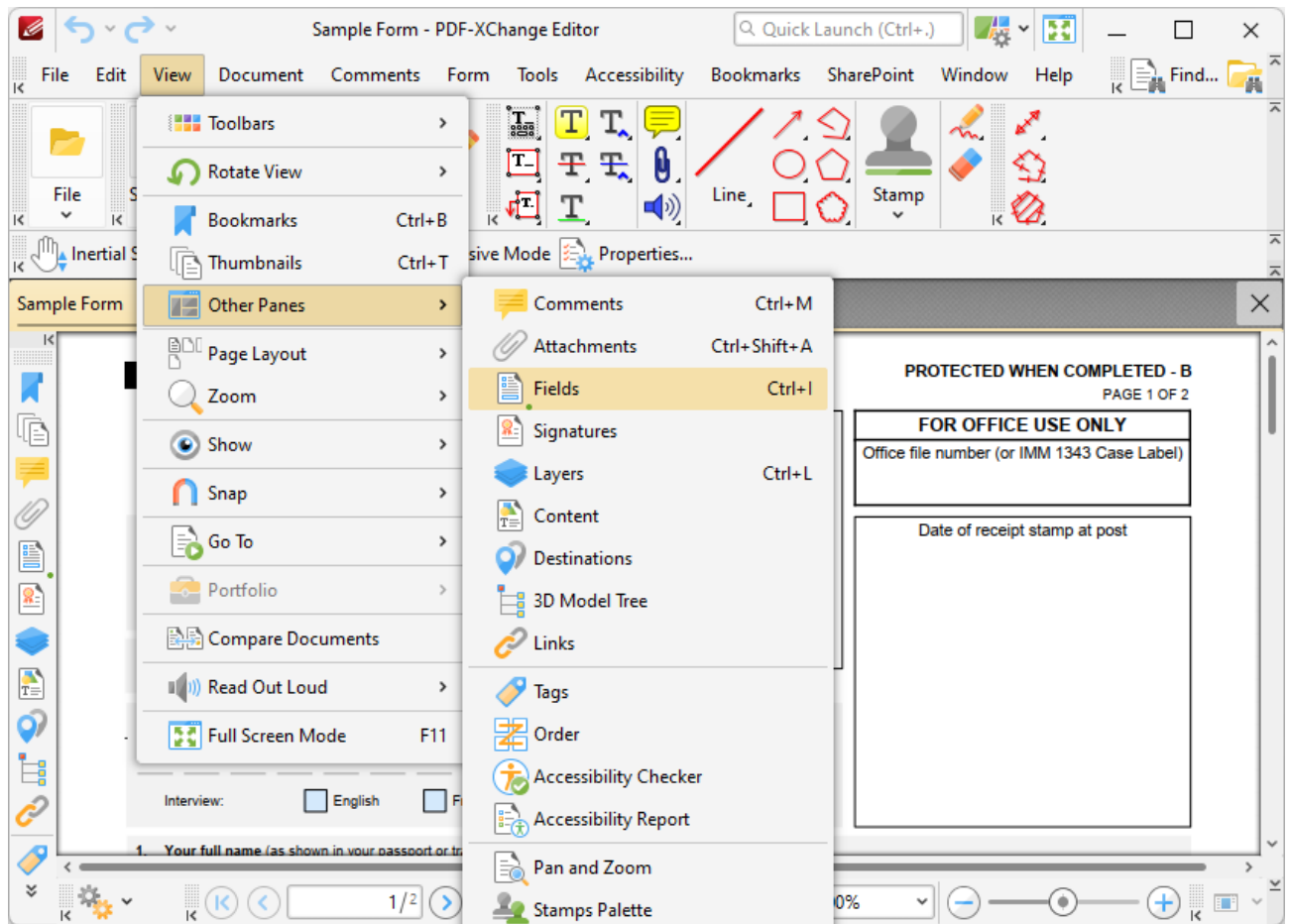
Figure 1. View Tab Submenu, Other Panes, Fields

The **Fields** pane details and facilitates the editing of existing document form fields:
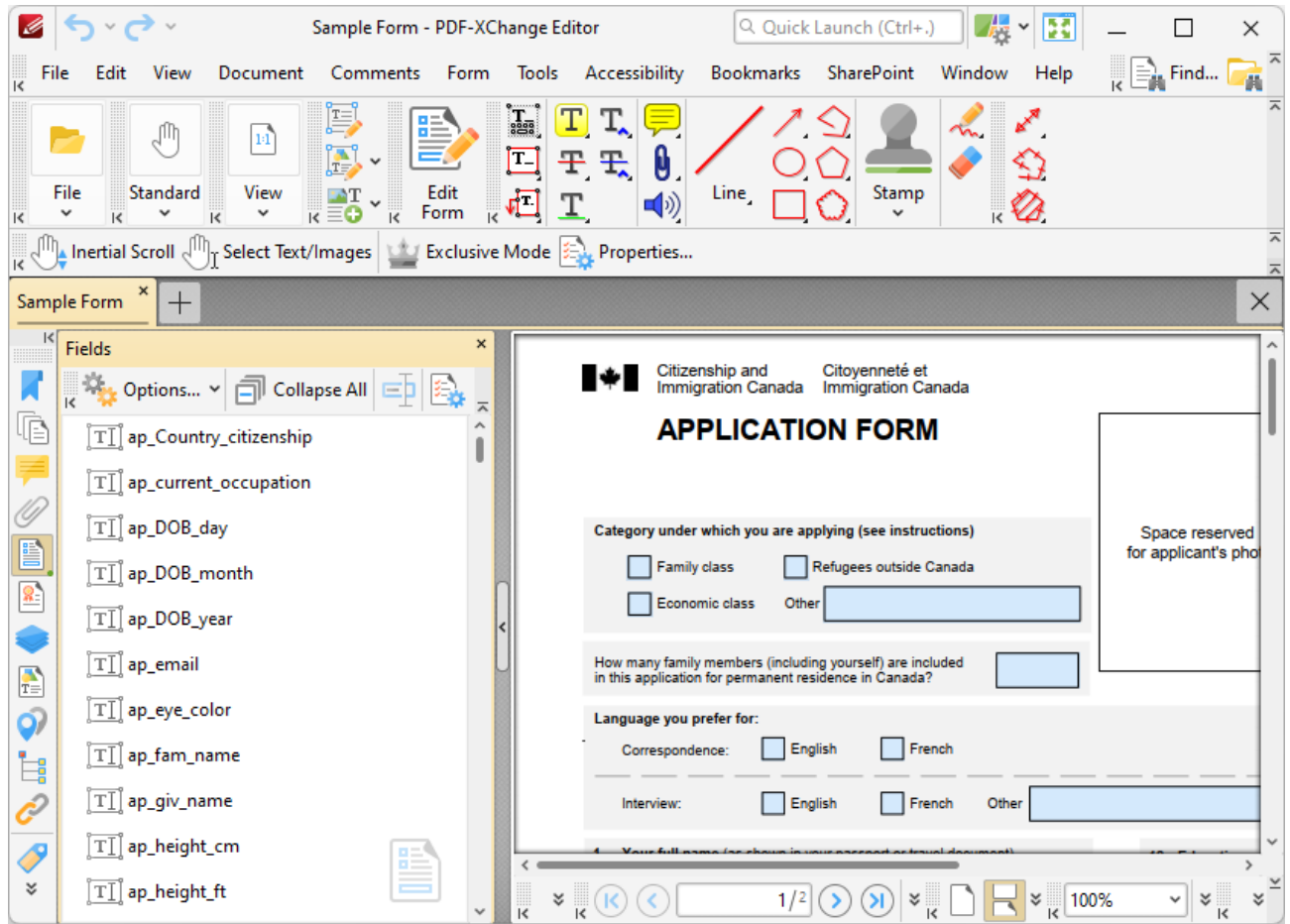
Figure 2. Fields Pane

Enable the **Edit Form** 319 feature (highlighted in the image above) then click fields in the **Fields** pane to select them in the document. Use the icons in the **Fields** pane to perform the following operations:

Click ⊡ Rename to rename selected fields.

Click 🔧 Properties... to view/edit properties of selected fields. The **Properties** pane will open. This pane details the status of properties for selected form fields. The properties detailed depend on the format of selected fields. Comprehensive information on form fields and their properties is available **here.** 319

Click 🔧 Options... for fields options:
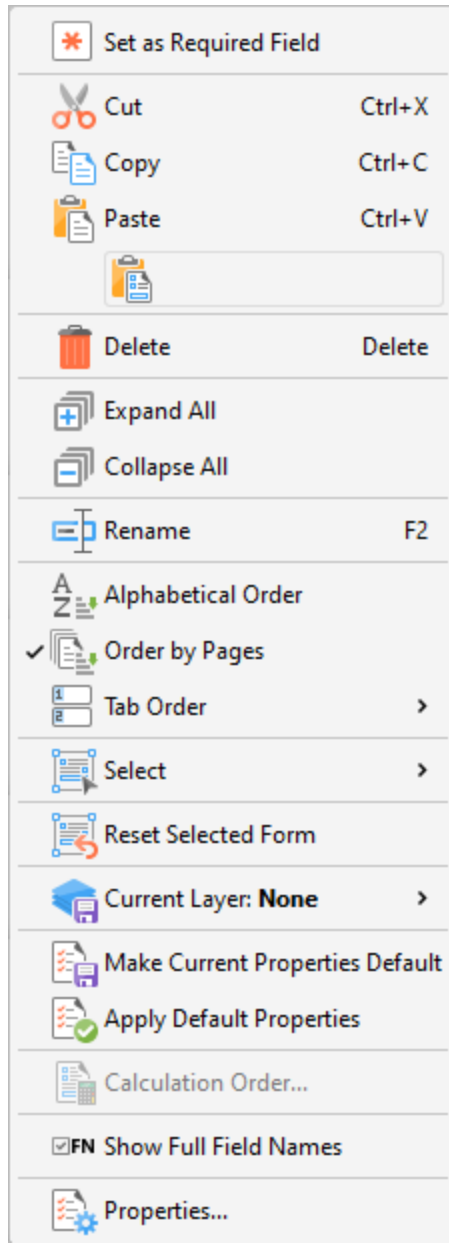
Figure 3. Forms Options

- Click **Set as Required Field** to set selected fields as required fields, which must be filled before documents can be submitted. These fields will also be highlighted when the **Highlight Required Fields Only** option outlined **here** 260 is enabled.
- Click **Cut, Copy, Paste** or **Delete** to perform these actions on selected fields.
- Click **Expand All/Collapse All** to expand/collapse all fields.
- Click **Rename** to rename selected fields.
- Select either **Alphabetical Order** or **Order by Pages** to order forms alphabetically or by page order as desired.

- Select an option from the **Tab Order** submenu to determine the order in which fields are tabbed through with when the Tab key is used. Note that **Order by Pages** must be enabled for the **Tab Order** option to be available.
- Click **Select** to select a fields of a specific type, or all fields, in the **Fields** pane.
- Click **Reset Selected Form** to reset form data entered into selected fields.
- Hover over **Current Layer** to move selected fields to an optional content layer. Further information about layers is available **here.** 535
- Click **Make Current Properties Default** to make the properties of selected fields the default properties for new fields of the same type.
- Click **Apply Default Properties** to apply default properties to selected fields.
- Click **Calculation Order** to determine the order of calculation when more than one form field in the document contains value calculation properties. See **here** 339 for further information.
- Click **Properties** to view/edit form properties. Note that the **Select Fields** feature must be enabled to view form properties, as detailed in *(figure 2)*. Form properties are detailed **here.** 793
- Click **Show Full Fields Name** to show/hide the full names of child fields in cases where fields are grouped according to name. The shared section of names is displayed when this option is enabled and hidden when it is disabled, as detailed below:
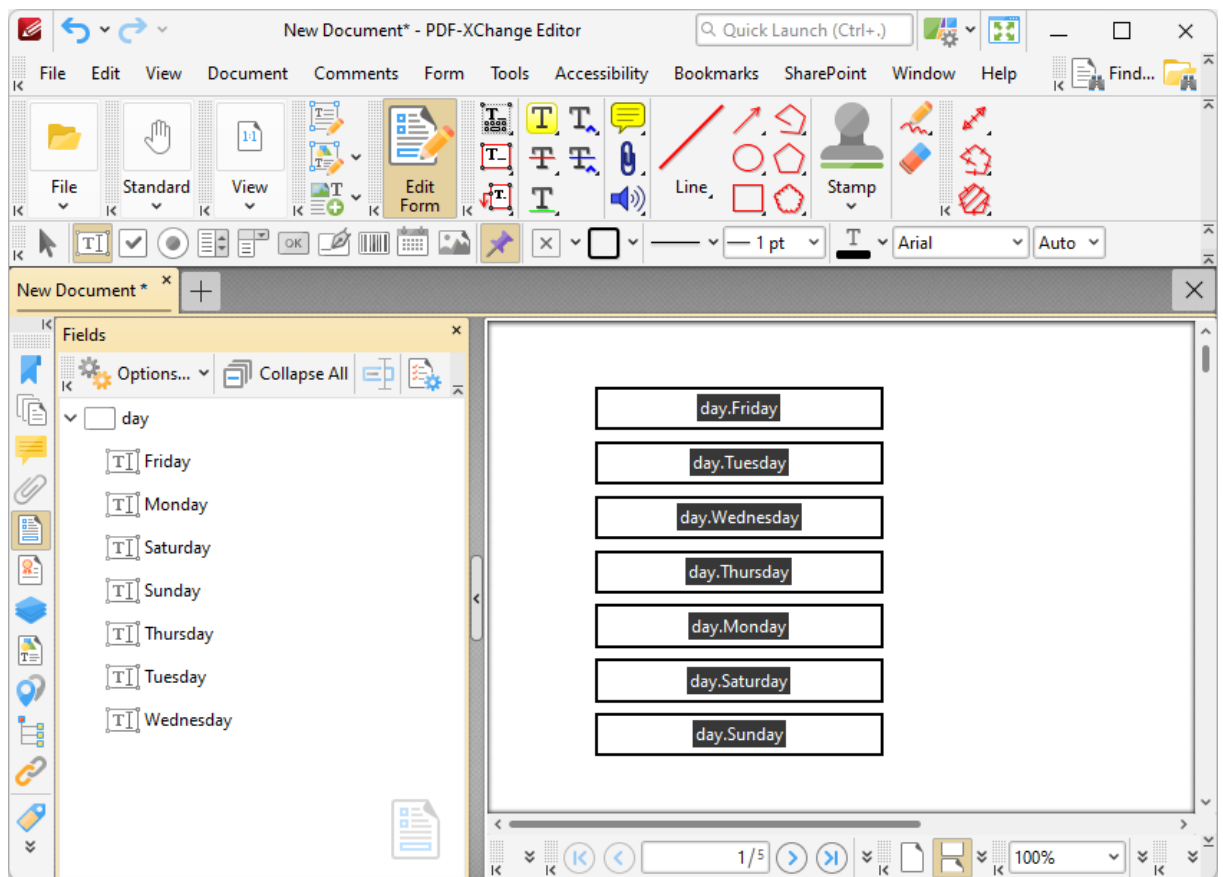
Figure 4. Fields Pane, Show Full Fields Name Enabled
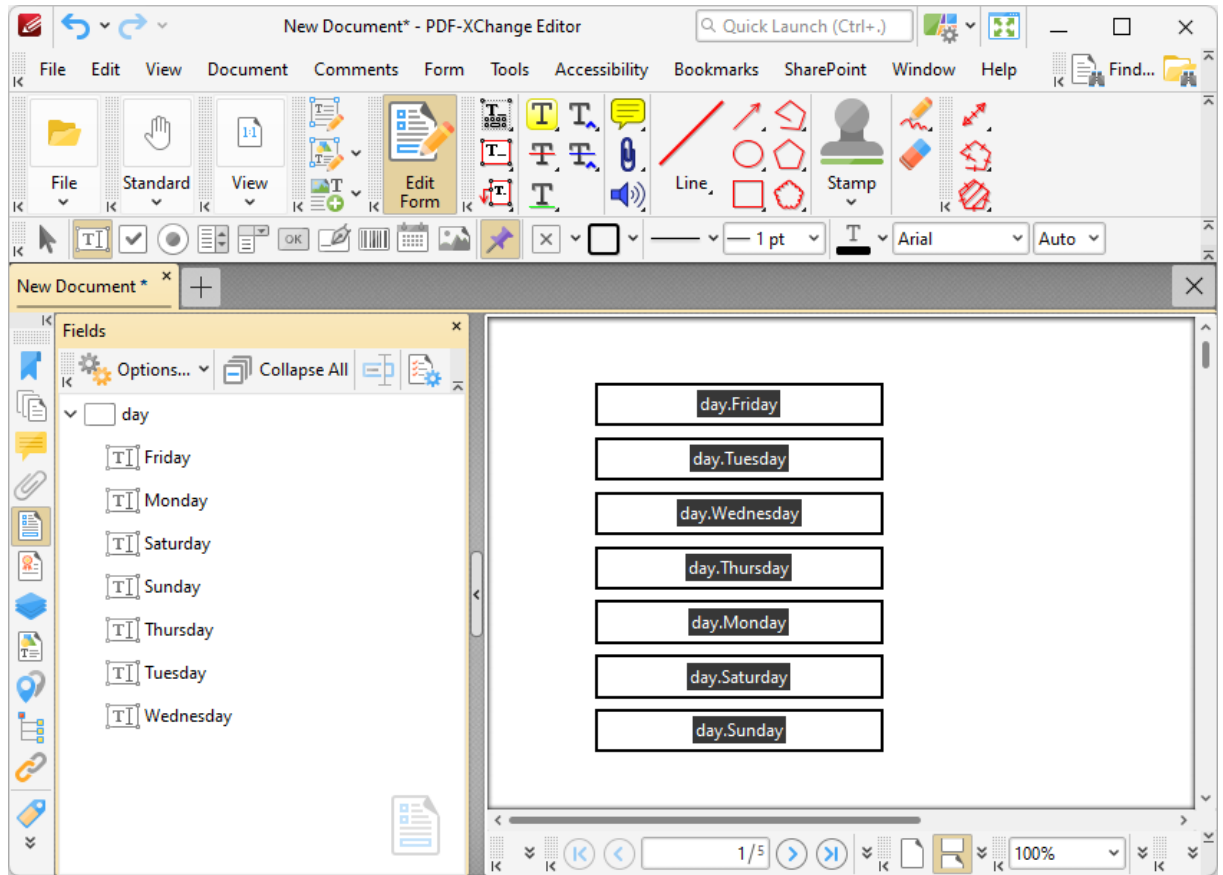
Figure 5. Fields Pane, Show Full Fields Name Disabled

Please note that additional editing options are available for forms when they are selected in the active document. These options are detailed **here.** 319

The keyboard shortcut to show/hide the **Fields** pane is Ctrl+I.

5.3.5.4 Signatures

Signatures

Click **Signatures** to open the **Signatures** pane:
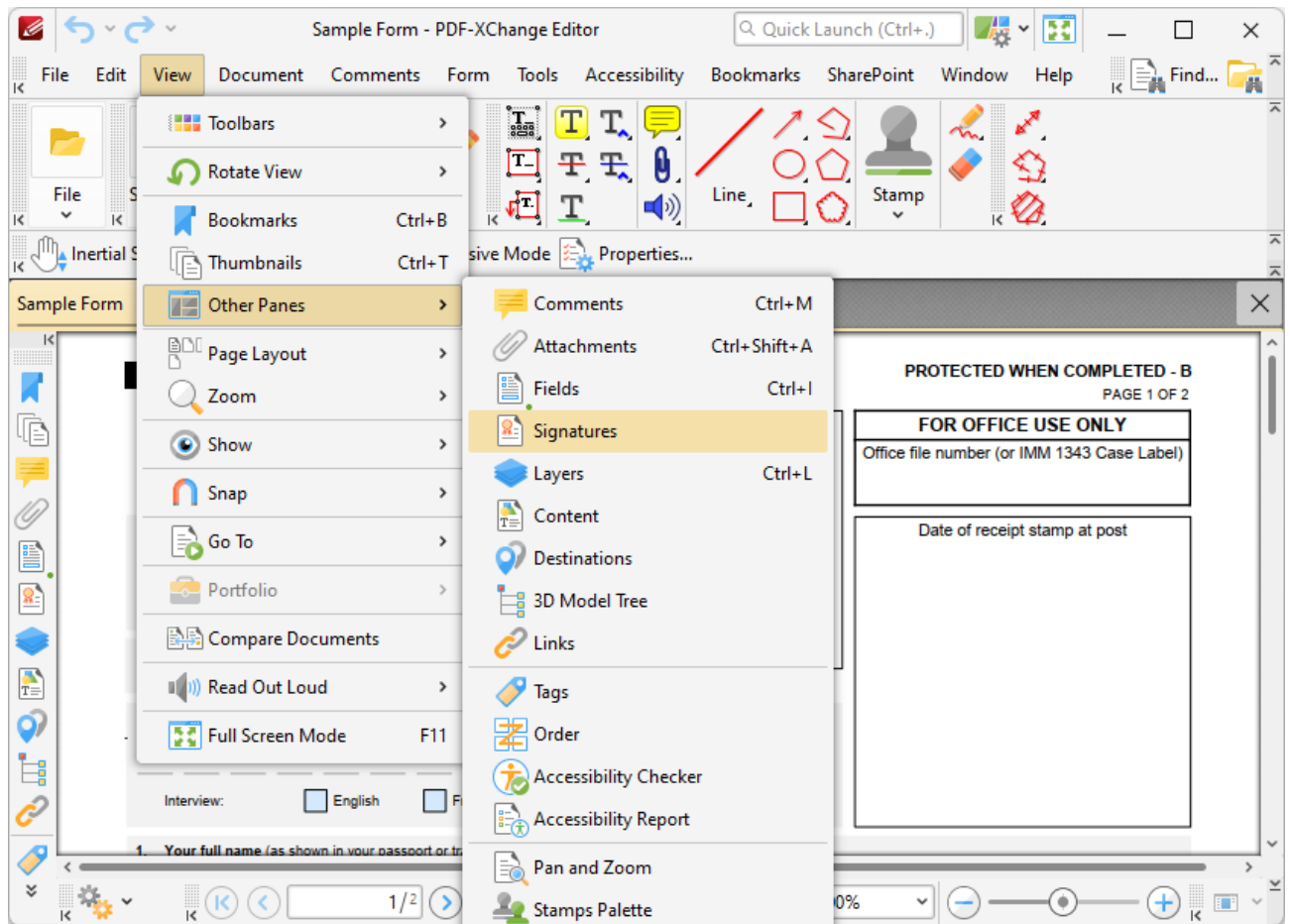
Figure 1. View Tab Submenu, Other Panes, Signatures

The **Signatures** pane displays information about existing digital signatures in the current document:
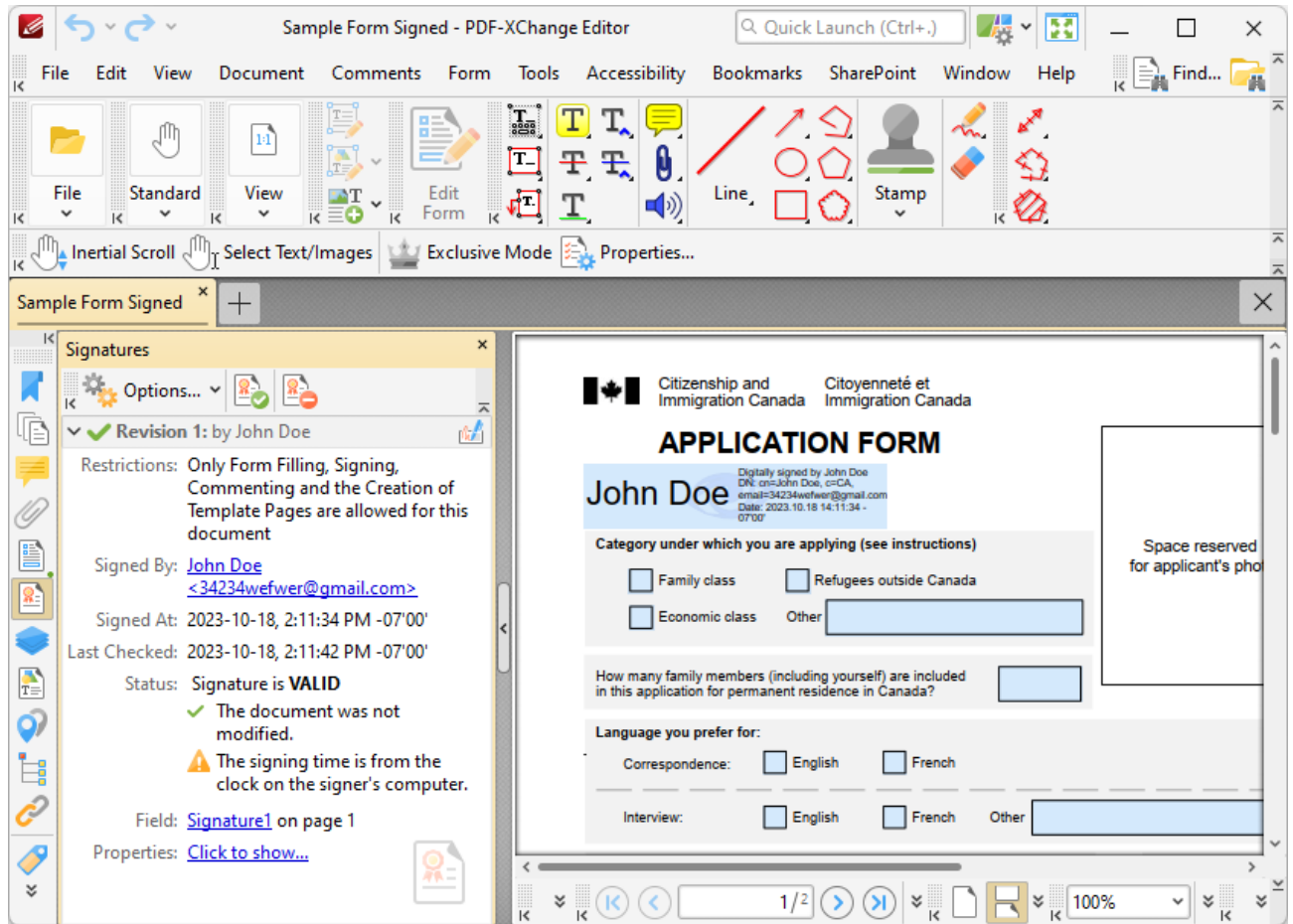
Figure 2. Signatures Pane

Digital signatures are used to demonstrate the authenticity of documents and increase their security. They can also be used to determine editing permissions for documents and/or utilize timestamp servers in order to further increase document security and integrity. The **Signatures** pane displays details about digital signatures in the current document, such as the restrictions that the signature imposes, the name of the person who added the digital signature, the time at which the document was signed and whether or not the signature conforms to the EU 910/2014 standard. Information and instructions about adding/editing digital signatures is available **here.** [741] Use the icons in the **Signatures** pane to perform the following operations:

Click ![Validate All Signatures icon] Validate All Signatures to validate all document signatures.

Click ![Clear All Signatures icon] Clear All Signatures to clear all digital signature fields in the document.

Click ![Options icon] Options... for signature options:
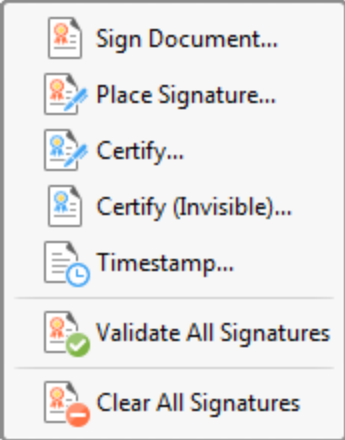
Figure 3. Signatures Options Submenu

These options are detailed **here.** 741

5.3.5.5 Layers

Layers

Click **Layers** to open the **Layers** pane:
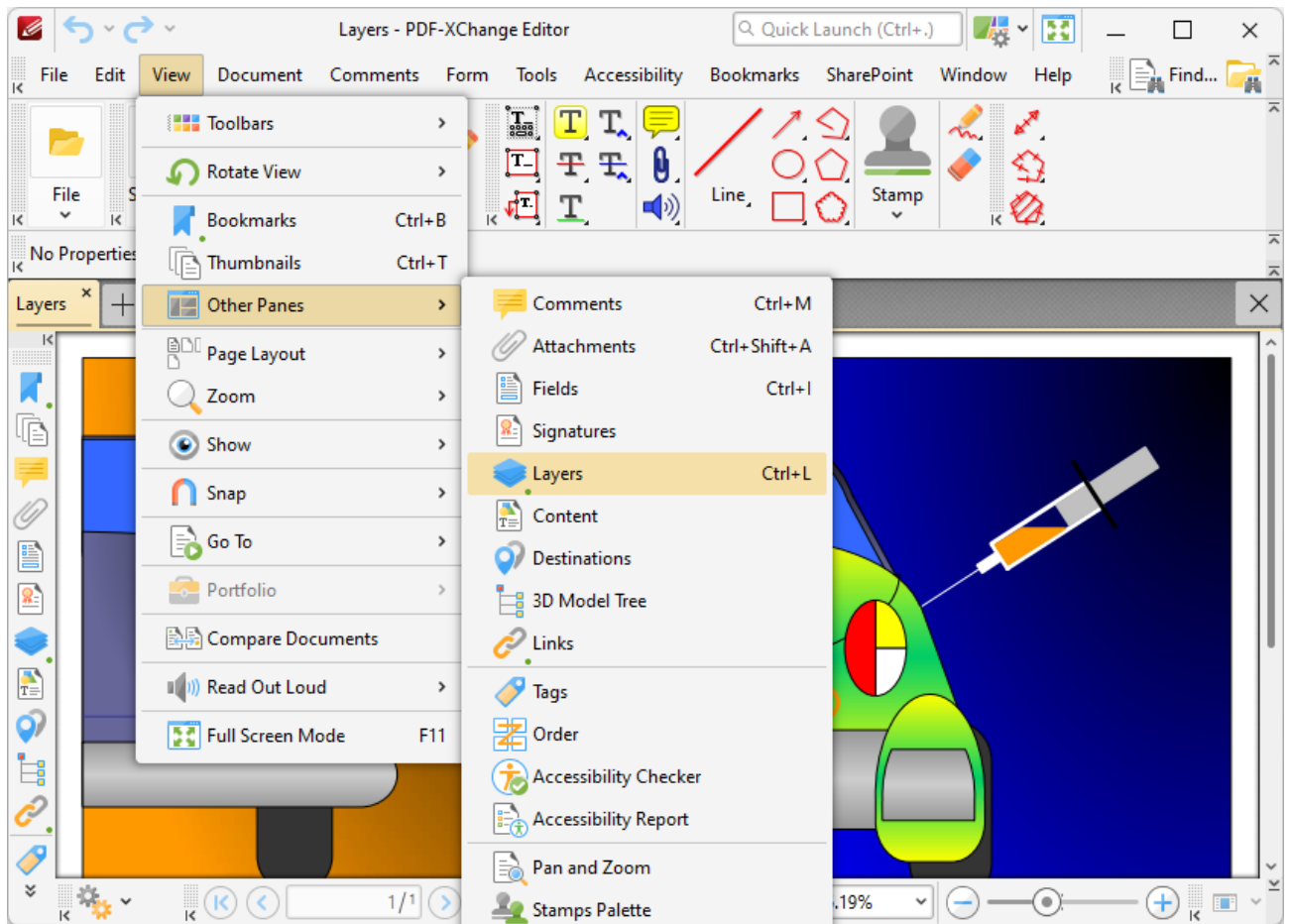
Figure 1. View Tab Submenu, Other Panes, Layers

The **Layers** pane displays information about document layers, which can be created using applications such as **InDesign, AutoCAD, Visio** and **PDF-XChange Editor**:
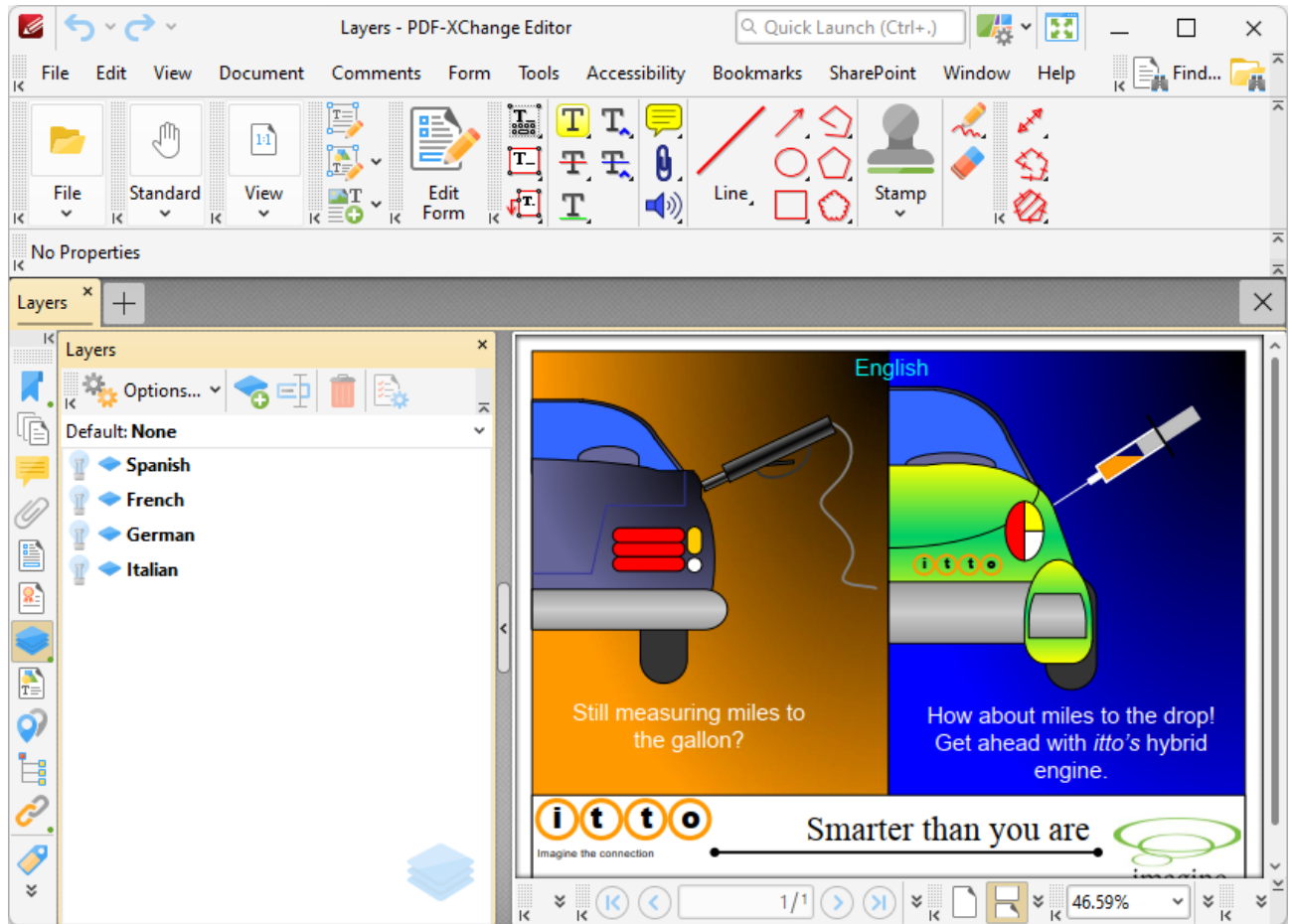
Figure 2. Layers Pane

Layers contain page content that can be displayed/hidden as desired. They are a useful feature in cases where documents need to feature a varying appearance depending on the intended audience. For example it is possible to create text-based layers that each feature a different language and fit over image-based content. The desired layer can then be enabled in order to match the language of the target audience:
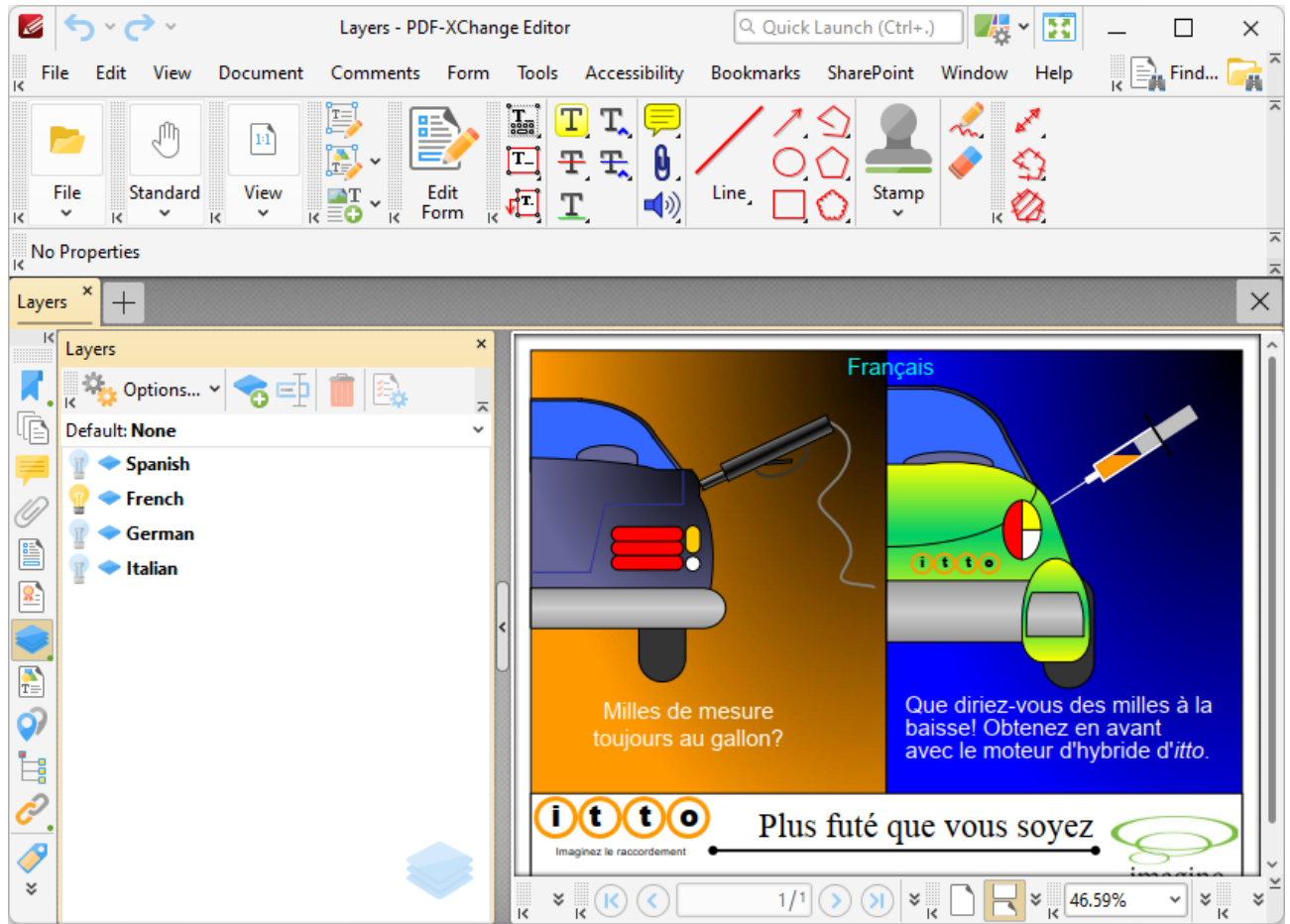
Figure 3. Sample Layers Document, French Layer Enabled
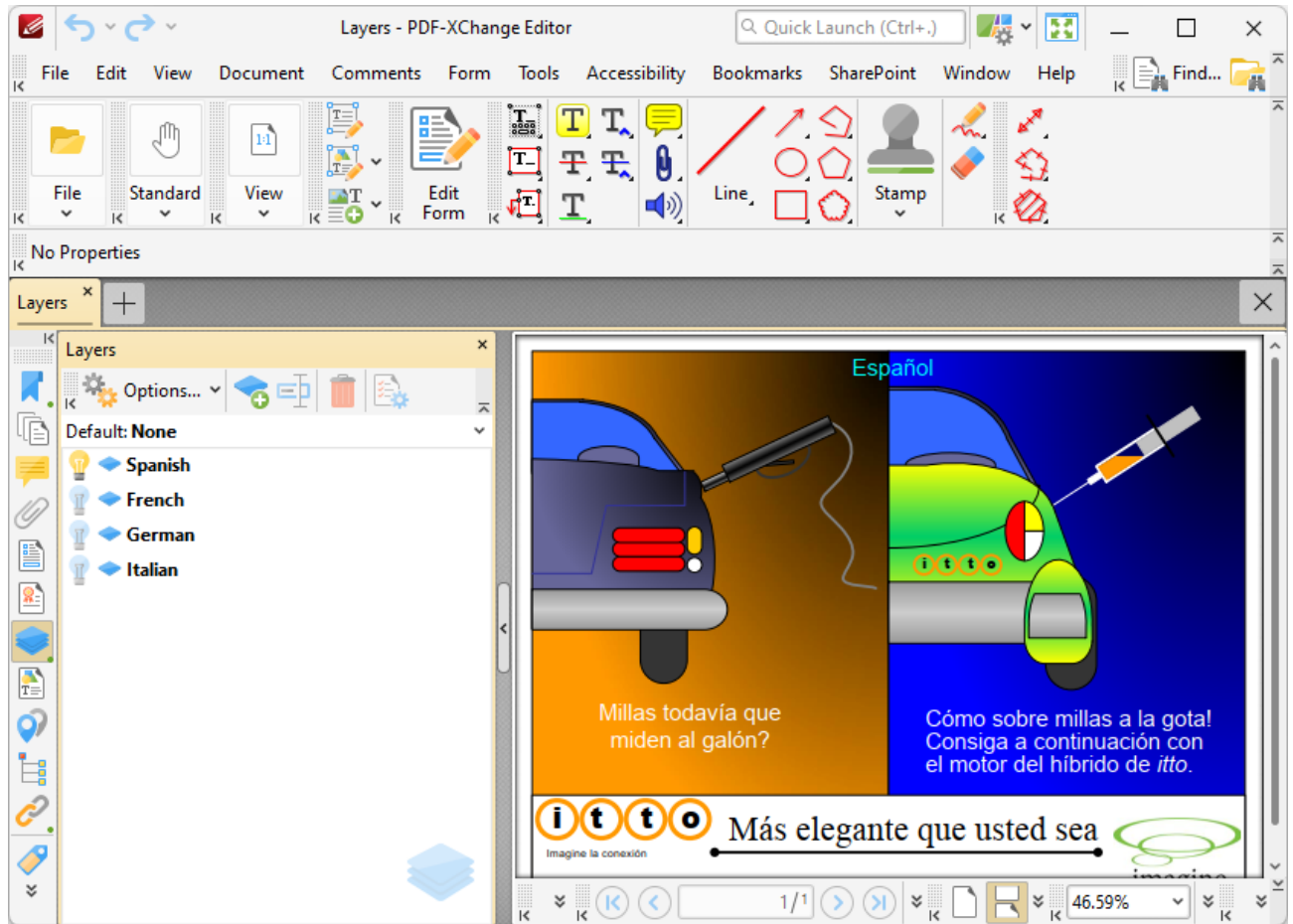
Figure 4. Sample Layers Document, Spanish Layer Enabled

Use the features in the **Layers** pane to perform the following operations:

Click **Options** to view options for layers, as detailed below.

Click **Add New Layer** to add a new layer to the current document, as detailed below.

Click **Rename** to rename selected layers.

Click **Delete** to delete selected layers.

Click to show/hide layers.

Use the **Default Layer** dropdown menu to determine the default layer of documents:
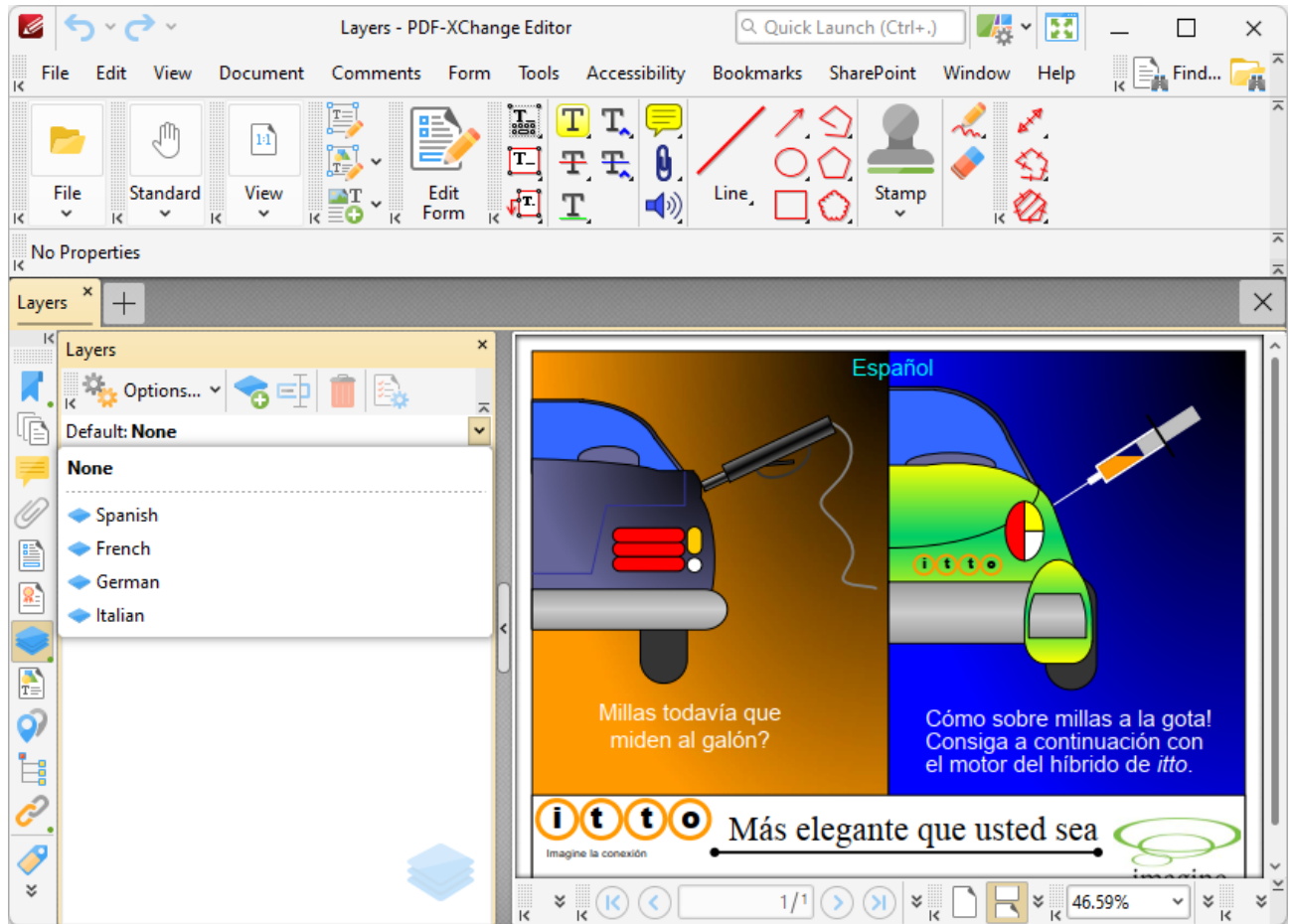
Figure 5. Layers Pane, Default Layer Dropdown Menu

When a default layer is specified all new content and comments added to the document will be added to this layer when the **Layers** pane is open. This enables you to save time and avoid the need to manually specify the layer to which new content and comments belong. Note that you can also drag and drop content/comments from their respective panes into the **Layers** pane to determine the layer to which they belong:
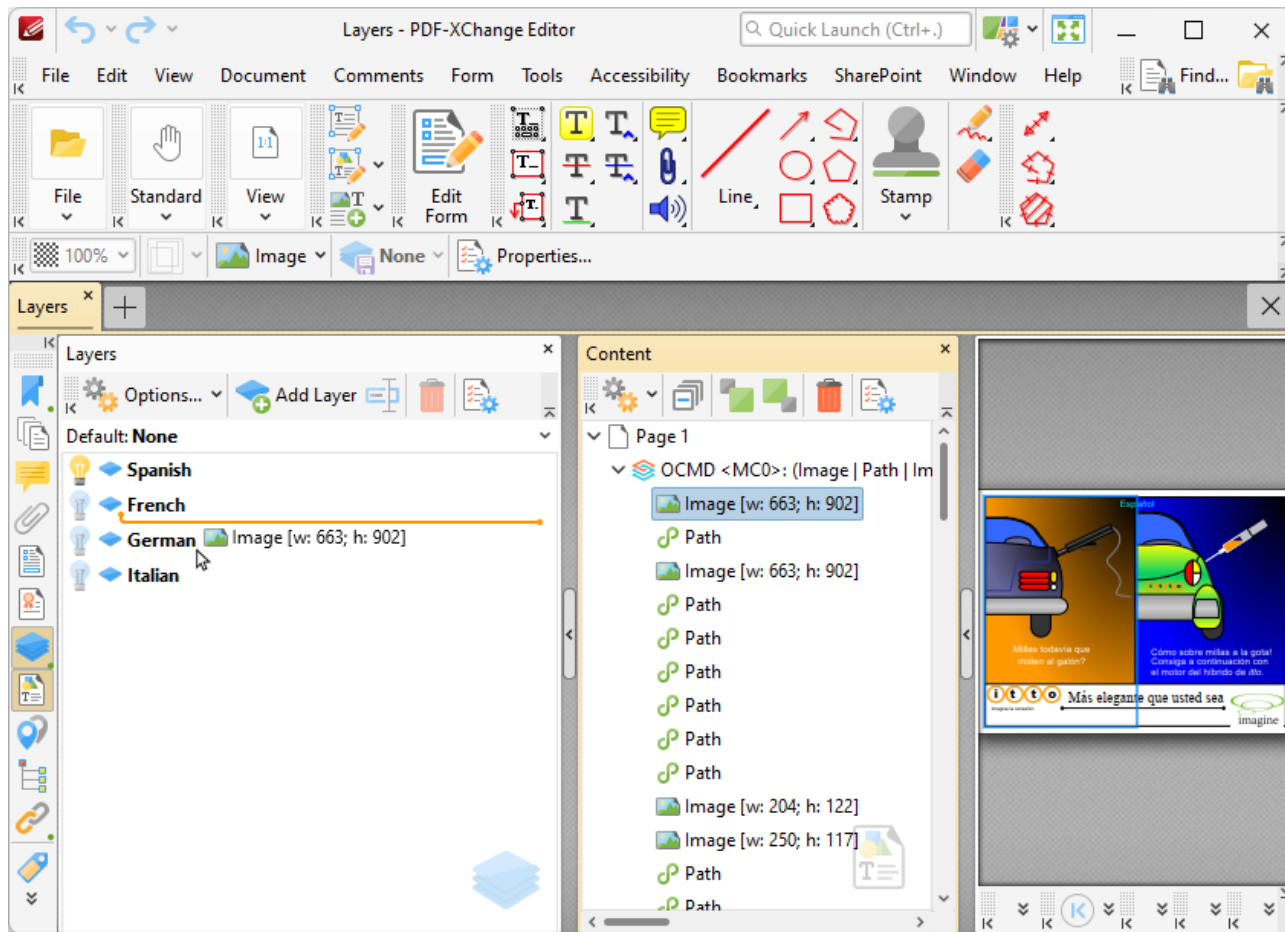
Figure 6. Moving Content from the Content Pane to the Layers Pane

Click **Properties** to view/edit the properties of selected layers. The **Layer Properties** pane will open:
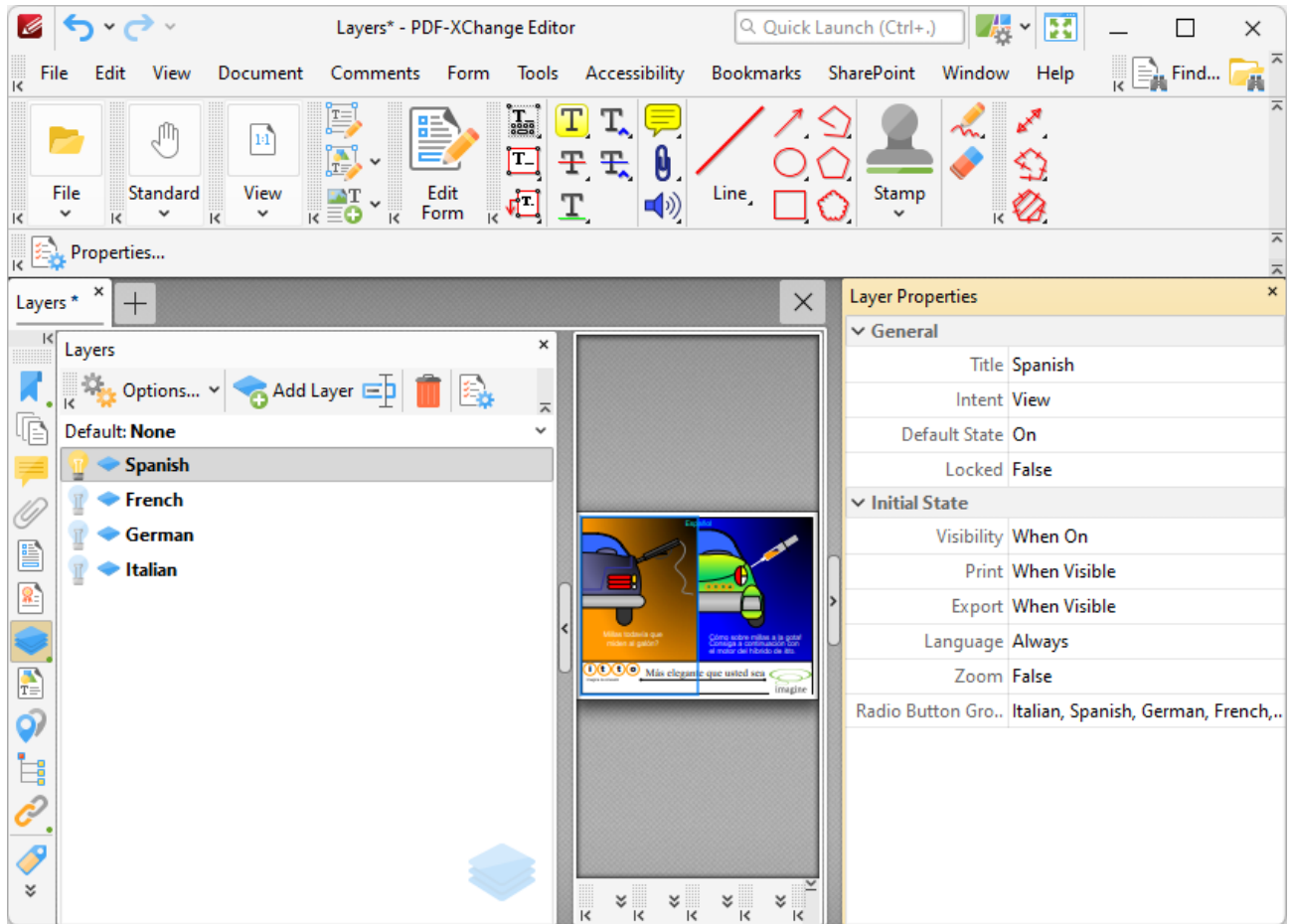
Figure 7. Sample Layers Document, Layer Properties Pane

- The **Title** property displays the title of layers as they appear in the **Layers** pane.
- The **Intent** property displays the intended use for layers:
  - **None** means there is no specified intent.
  - **View** means that the layer is intended for use as a viewing aid.
  - **Design** means the layer is intended for use in understanding the design of the document.
  - **Design and View** means both **Design** and **View** as detailed above.
  - Please note that PDF applications may use the **Intent** property to determine whether or not layers are displayed.
- The **Default State** property displays the default (initial) state of layers when the document that contains them is opened,
- The **Locked** property displays the editable status of the layer.
- The **Visibility** property displays the visibility status of layers.
- The **Print** property displays the printing status of layers.
- The **Export** property displays the export status of layers. This property determines whether or not layers appear in resulting documents when the file is exported to an application/file format that supports layers.
- The **Language** property determines layer visibility according to the user interface language. If **Always** is selected then the layer is visible regardless of the language of the user interface. If a

language is specified, then the layer will only be visible when the language of the user interface matches the language specified for this property.

- The **Zoom** property determines layer visibility according to the document zoom level. If **False** to selected then the layer will be visible regardless of the document zoom level. If **True** is selected then the layer will only be visible when the document zoom level is between the zoom levels specified.
- The **Radio Button Group** property displays the radio button group to which the layer belongs. Layers that belong to a radio button group are mutually exclusive - when one layer from a group is enabled, the other layers in the group are automatically disabled and cannot be enabled.

Click ⚙ **Options** to view layers options:
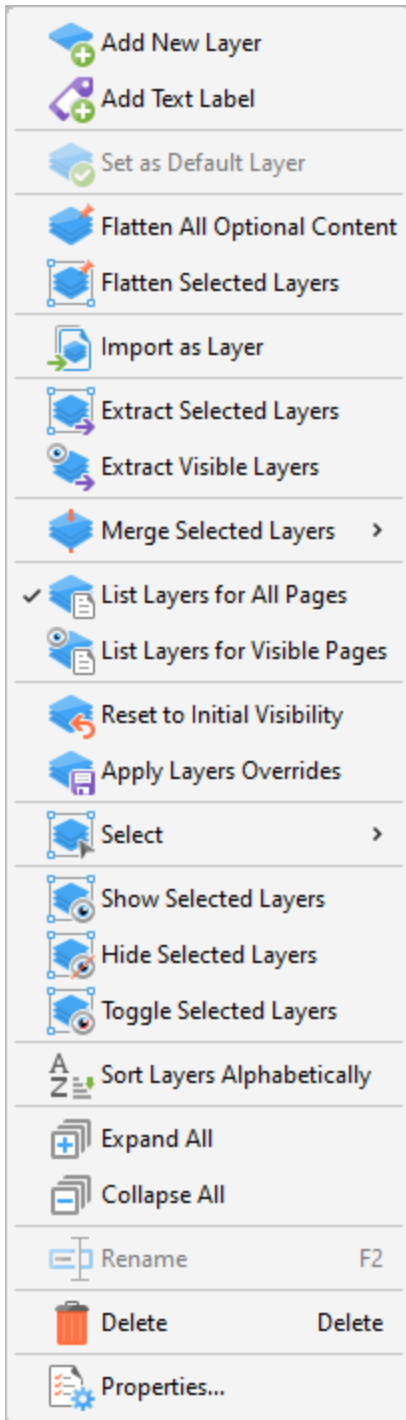
Figure 8. Layers Options

- Click **Add New Layer** to add a new layer to the current document. The **Add New Layer** dialog box will open, as detailed below.
- Click **Add Text Label** to add a text label to selected layers.
- Click **Set as Default Layer** to set the selected layer as the default layer. All content and comments added to the document will be added to this layer.

- Click **Flatten All Optional Content** to flatten optional content to the base content layer of the document.
- Click **Flatten Selected Layers** to convert selected layers into base content. Layers converted in this manner can then be edited using the **Edit Objects Tool.** [823]
- Click **Import as Layer** to import pages from a different document as a new layer, as detailed below.
- Click **Extract Selected Layers** to extract selected layers to a new document.
- Click **Extract Visible Layers** to extract visible layers to a new document.
- Click **Merge Selected Layers** to merge selected layers.
- Click **List Layers for All Pages** to display layers on every page of the document.
- Click **List Layers for Visible Pages** to display layers on the pages currently visible in the document.
- Click **Reset to Initial Visibility** to revert all layers to their default state.
- Click **Apply Layers Overrides** to display all layers. This option includes layers not listed in the **Layers** pane.
- Hover over **Select** to view options for selecting a subset of items in the **Layers** pane:
    - Click **Select All** to select all layers.
    - Click **Text Labels** to select all text labels.
    - Click **Visible** to select all visible items.
    - Click **Hidden** to select all hidden items.
    - Click **Empty** to select all items that do not belong to content items or annotations.
    - Click **Invert Selection** to invert the current selection of items in the **Layers** pane.
- Click **Show/Hide/Toggle Selected Layers** to show/hide/toggle selected layers in the document.
- Click **Sort Layers Alphabetically** to sort layers into alphabetical order.
- Click **Expand All** to expand all layers in the **Layers** pane.
- Click **Collapse All** to collapse all layers in the **Layers** pane.
- Click **Rename** to rename selected layers.
- Click **Delete** to delete selected layers.
- Click **Properties** to view/edit the properties of the selected layer, as detailed above.
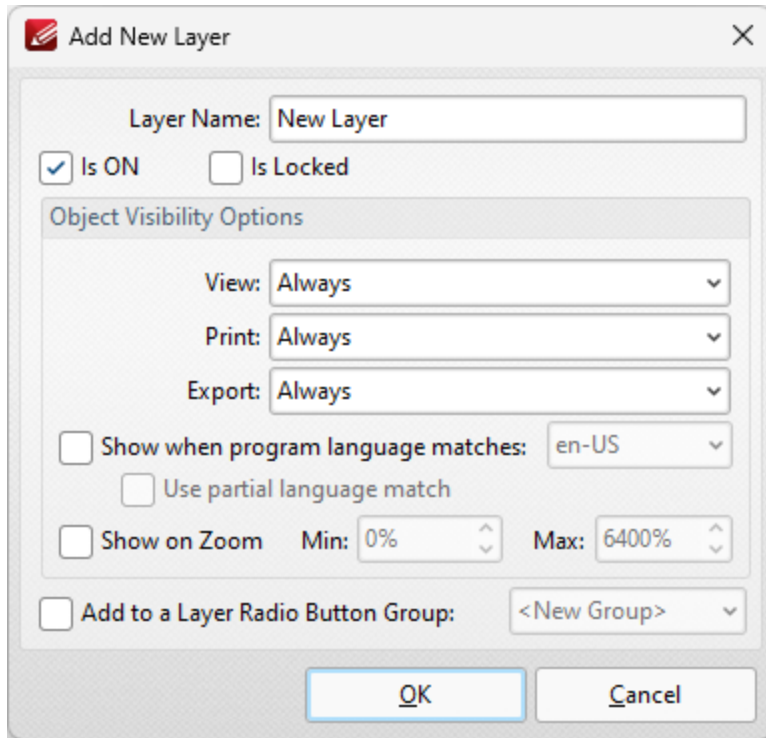
Figure 9. Add New Layer Dialog Box

- Enter the name of the new layer in the **Layer Name** text box.
- Select/clear the **is ON** box to set the default state of the layer to on/off.
- Select the **Add to Layers Pane** box to add the new layer to the **Layers** pane.
- Select/clear the **Is Locked** box to disable/enable subsequent users from changing the state of the layer.
- Use the **Object Visibility Options** dropdown menus to determine the visibility of the layer when the documents that contains it is viewed/printed/exported.
- Select the **Show when system language matches** box to show the layer when the application language matches a given language, then select the desired language in the adjacent dropdown menu.
- Select the **Use partial language match** to display the layer when there is a partial language match with the language specified. A partial language match occurs when the region of the language is the same as in the language specified but the locale is different. For example, if **US English** is specified in the **Show when system language matches** dropdown menu and the **Use partial language match** box is selected, then the layer will be displayed when the application language is identified as **US English, United Kingdom English, South African English** and all other derivatives of English listed in the dropdown menu.
- Select the **Show on Zoom** box to display the layer when the zoom function is used. Use the adjacent number boxes to specify the minimum and maximum levels of zoom at which the layer is displayed.
- Select the **Add to a Layer Radio Button Group** to add the layer to a **Layer Radio Button Group.** Layers contained in a radio button group are mutually exclusive - if one layer is enabled then the rest are disabled.

- Select the **Add selected Comments to this layer** box to add selected comments to the layer.

Click **OK** to save changes.

Import as Layer
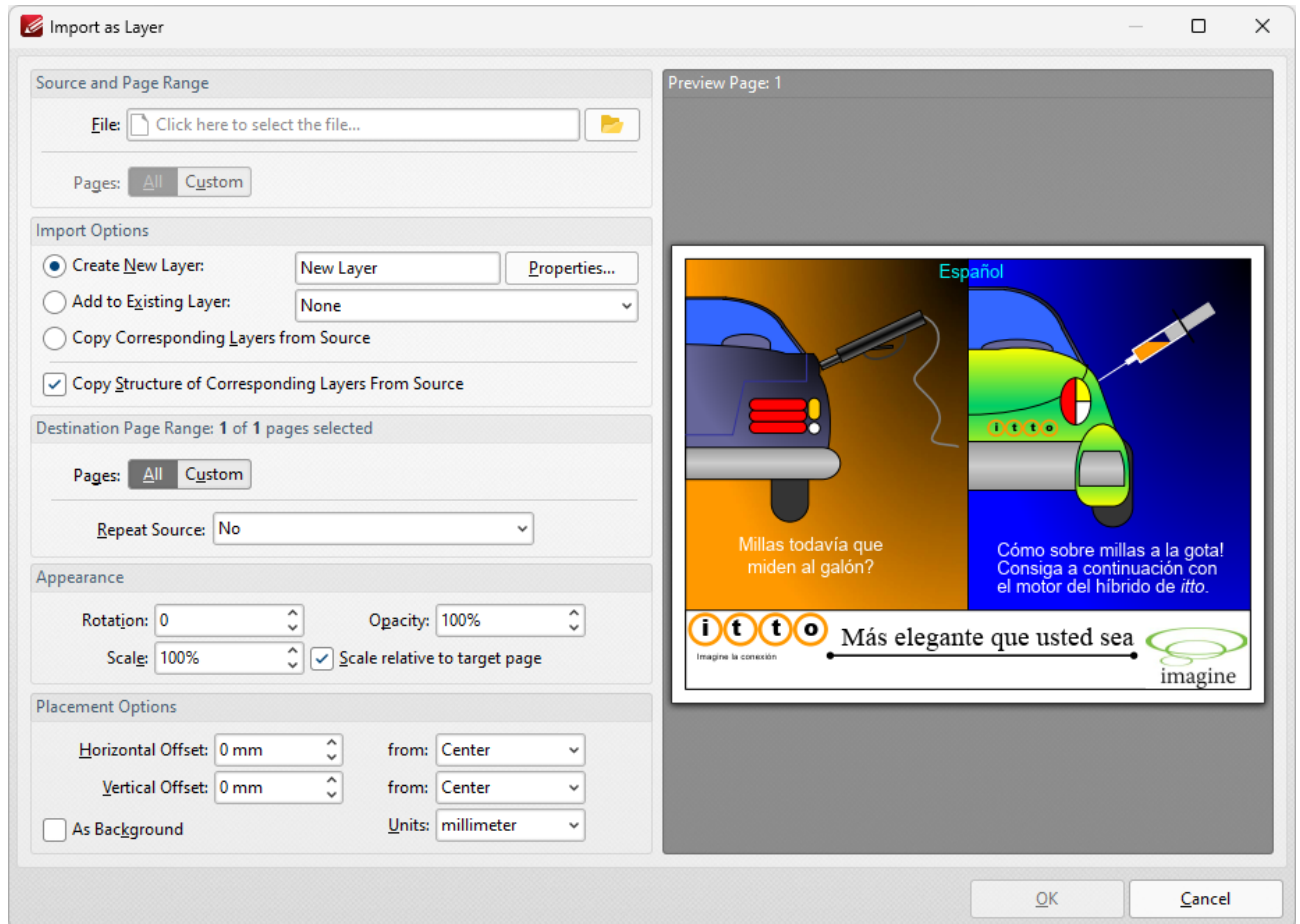
Figure 10. Import as Layer Dialog Box

- Use the **File** dropdown menu to select a file to import as a layer into the document.
- Use the **Pages** option to determine the pages used from the source document. Click **All** to use all pages, or **Custom** to specify a custom page range.
- Use the **Import Options** to determine import options for the new layer:
  - Click **Create New Layer** to create a new layer for the imported content. Enter a name for the new layer in the text box and click **Properties** to determine layer properties, as detailed in *(figure 9)* above.
  - Click **Add to Existing Layer** to add imported content to an existing layer, then selected the desired layer from the dropdown menu.
  - Click **Copy Corresponding Layers from Source** to copy corresponding layers from the source document into the current document.

- Click **Copy Structure of Corresponding Layers From Source** to copy the layer structure from the source document into the current document.
- Use the **Destination Page Range** options to determine the page range into which layers are imported:
  - Use the **Pages** option to determine the pages used from the source document. Click **All** to use all pages, or **Custom** to specify a custom page range.
  - Use the **Repeat Source** dropdown menu to determine repeat options for the source document in cases where it contains fewer pages than the current document:
    - Select **No** to disable the repeating of layers from the source document in the current document.
    - Select **Last selected page** to repeat the last selected layer in the source document.
    - Select **Continuously repeat selected pages** to repeat the layers selected in the source document repeatedly until they fill the current document.
- Use the **Appearance** options to determine the appearance of layers from the source document in the current document:
  - Select an option in the **Rotation** dropdown menu to determine the rotation of the layers.
  - Select an option in the **Opacity** dropdown menu to determine the opacity of the layers.
  - Select an option in the **Scale** dropdown menu to determine the scaling of the layers.
- Use the **Placement Options** to determine the placement of layers:
  - Use the **Horizontal Offset** number box to determine the horizontal offset of layers. Use the adjacent dropdown to determine the location from which the offset is made.
  - Use the **Vertical Offset** number box to determine the vertical offset of layers. Use the adjacent dropdown to determine the location from which the offset is made.
  - Use the **Units** dropdown menu to specify the units of measurement for offsets.
  - Select the **As Background** box to import layers as a background.

Click **OK** to import layers.

Please note that it is necessary to save, close and reopen documents in order for some of the settings detailed above to be displayed.

5.3.5.6   Content

Content

Click **Content** to open the **Content** pane:
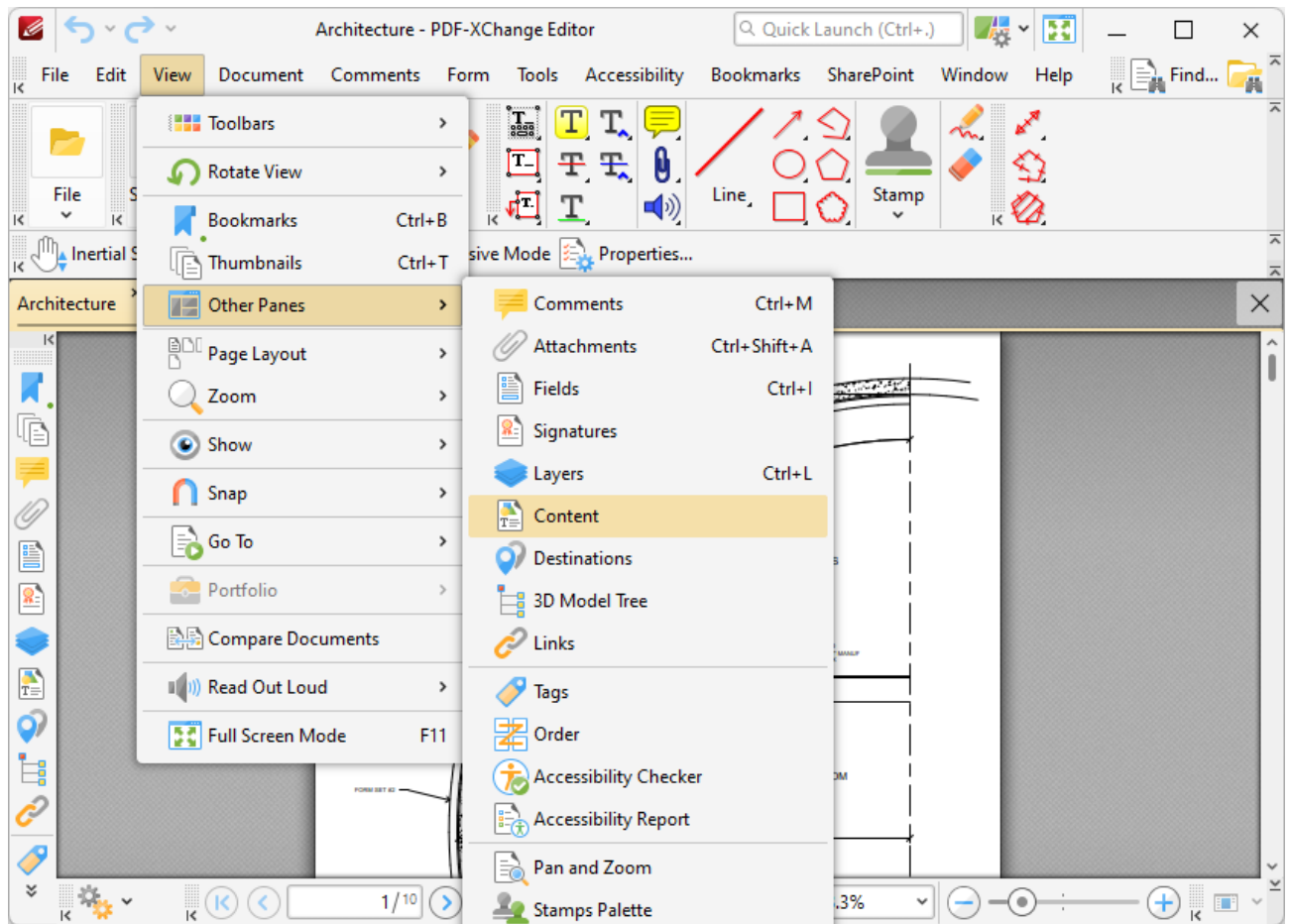
Figure 1. View Tab Submenu, Other Panes, Content

The **Content** pane displays a list of the document pages and the base content that they contain:
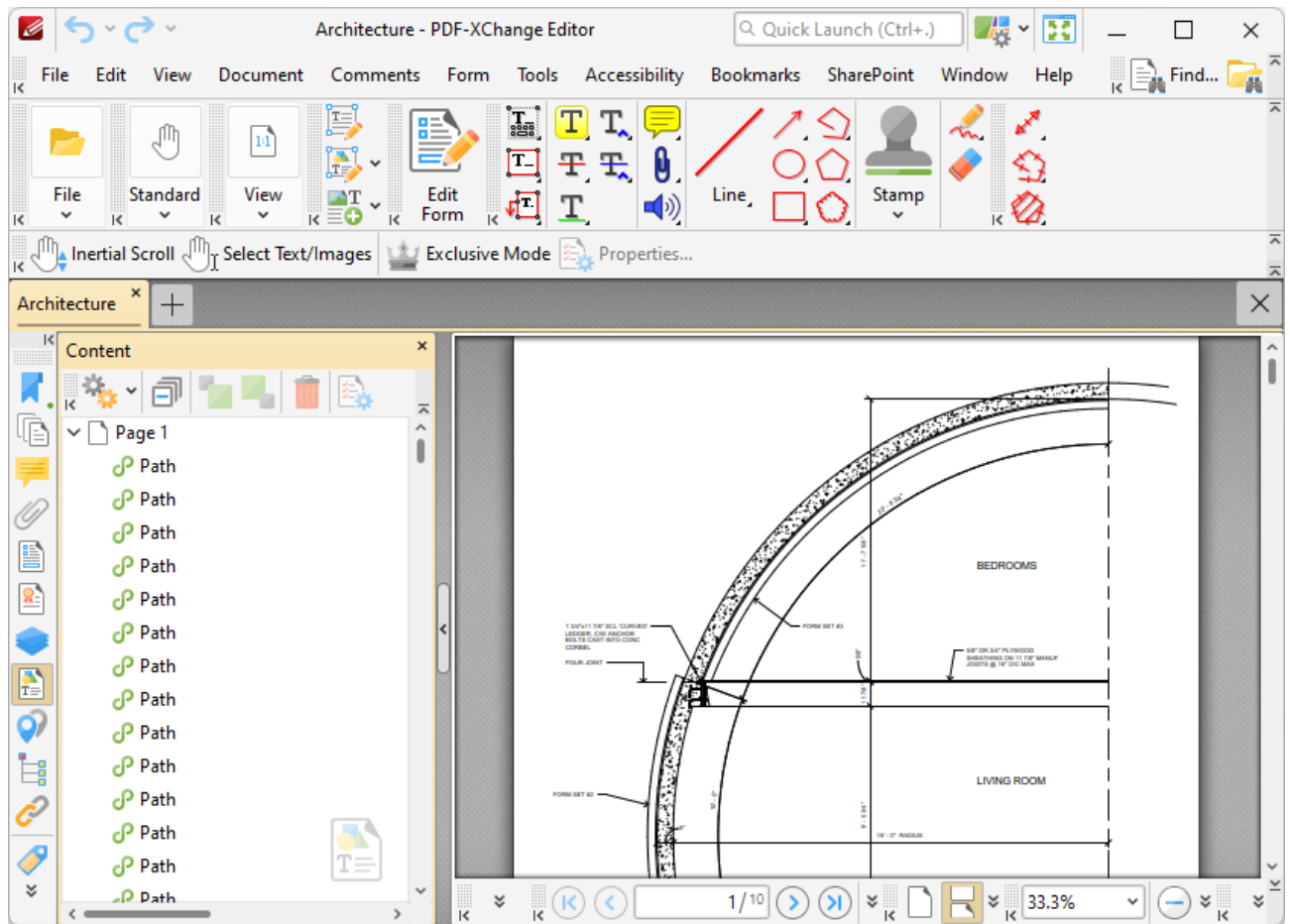
Figure 2. Content Pane

Click items in the **Content** pane to select them in the active document. They can then be edited as detailed **here.** 1138 Use the icons in the **Content** pane to perform the following operations:

Click ⬚ **Collapse All** to collapse all items in the **Content** pane.

Click ⬚ **Bring Forward** to bring selected content forward in cases where multiple content items overlap.

Click ⬚ **Send Backward** to send selected content backward in cases where multiple content items overlap.

Click 🗑 **Delete** to delete selected content.

Click ⬚ **Properties** to view/edit the properties of selected content. The **Page Content Properties** pane will open. This pane details the status of properties for selected content:

Figure 3. Page Content Properties Pane

Click to edit properties as desired. Please note that not all properties are editable. The following properties are available for content items:

- **Layer** determines the optional content layer to which document content belongs. Further information about layers is available **here.** 535
- **Fill Color** displays the fill color.
- **Opacity** displays the level of transparency.
- **Stroke Color** displays the border color.
- **Stroke Opacity** displays the border transparency level.
- **Border Width** displays the border width.
- **Line Cap** displays the shape used at the start and endcaps for open stroked paths or the caps at both ends of dashes in stroked paths.
- **Line Join** displays the shape used at joints between connected segments of stroked paths.
- **Filling Rule** determines the manner in which fills are defined and displayed.
- **Blend Mode** displays the blend mode when items overlap. Further information on blend modes is available **here.** 1107
- **Width** displays the width of images.
- **Height** displays the height of images.

- **Type** displays the format of images.
- **BPC** displays the color depth.
- **Color Space** displays the color model.
- **Mask Type** displays the mask type.
- **Object Number** displays the object number of selected content items.
- **Font** displays the font.
- **Font Size** displays font size.
- **Bold** displays the bold status.
- **Italic** displays the italic status.
- **Transparency Group** displays the transparency group value for XForms.

Click ⚙ Options... **Options** for content item options:
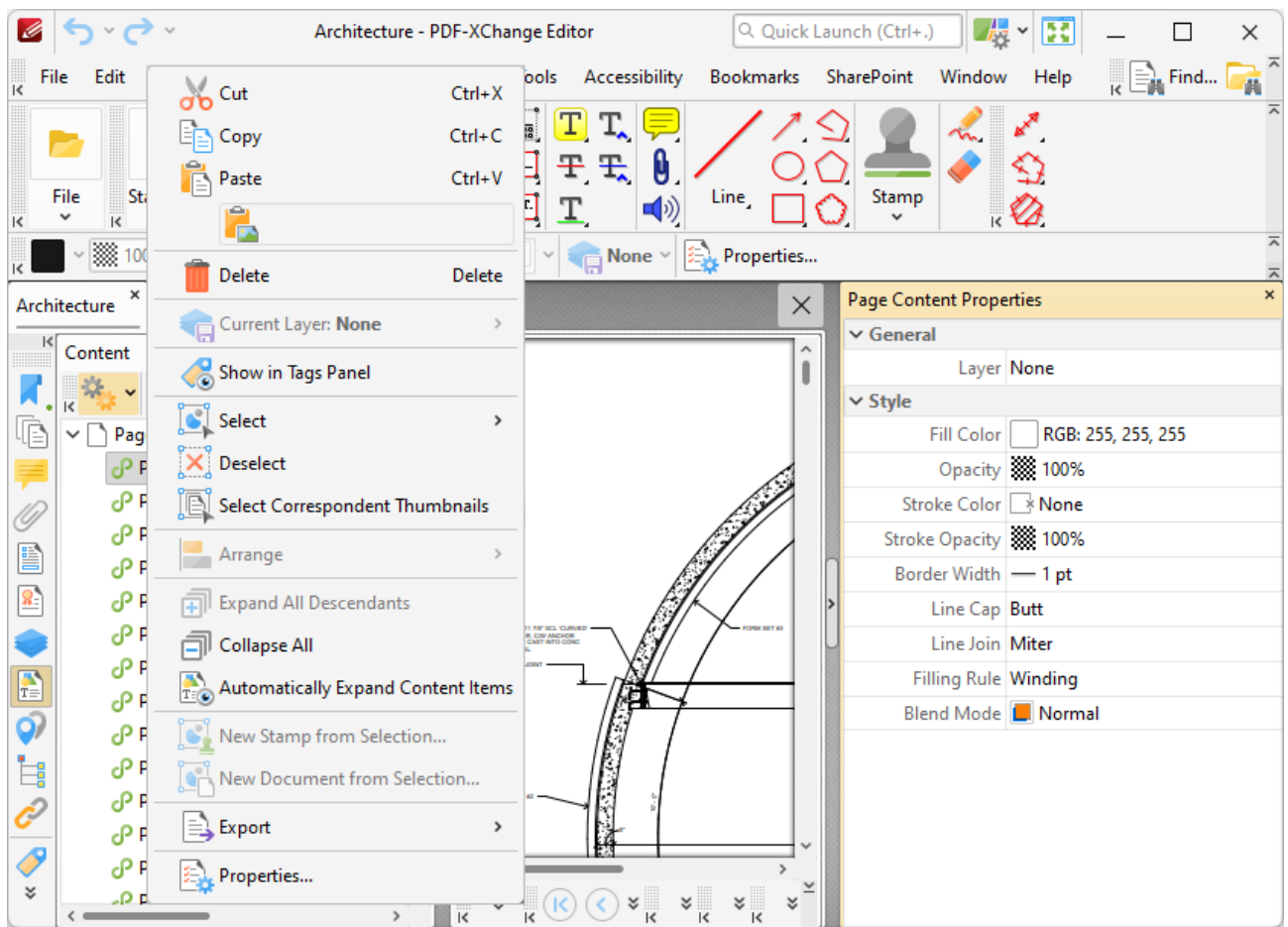
Figure 4. Content Options

- Click **Cut, Copy, Paste** or **Delete** to perform these operations on selected content items.
- Hover over **Current Layer** to view/edit the layer to which selected content belongs.
- Click **Show in Tags Panel** to view selected content in the **Tags** [569] pane in cases where the content has been tagged.

- Hover over **Select** to view selection options:
  - Click **All** to select all content items.
  - Click **Text** to select all textual content items.
  - Click **Images** to select all image items.
  - Click **Shapes** to select all shape items.
  - Click **XForms** to select all XForms items.
- Note that editing options such as **Cut, Copy, Paste, Delete** - and changes made to properties in the **Page Content Properties** pane - will apply to all content selected via the choice made in the **Select** submenu.
- Click **Deselect** to deselect all selected content items.
- Click **Select Correspondent Thumbnails** to select the corresponding thumbnails of selected content in the **Thumbnails** [510] pane.
- Click **Arrange** to arrange selected content items, as detailed **here.** [1120]
- Click **Expand All Descendants** to expand all descendant items of selected content items.
- Click **Collapse All** to collapse all items in the **Content** pane.
- Click **Automatically Expand Content Items** to expand content items in the **Content** pane automatically when they are selected with content-editing tools in the document.
- Click **New Stamp from Selection** to create a new stamp from selected content, as detailed **here.** [946]
- Click **New Document from Selection** to create a new document from selected content.
- Click **Export** to export selected content to image format, as detailed **here.** [168]
- Right-click items in the **Content** pane for additional editing options, as detailed **here.** [824]

5.3.5.7   Destinations

Destinations

Click **Destinations** to open the **Named Destinations** pane:
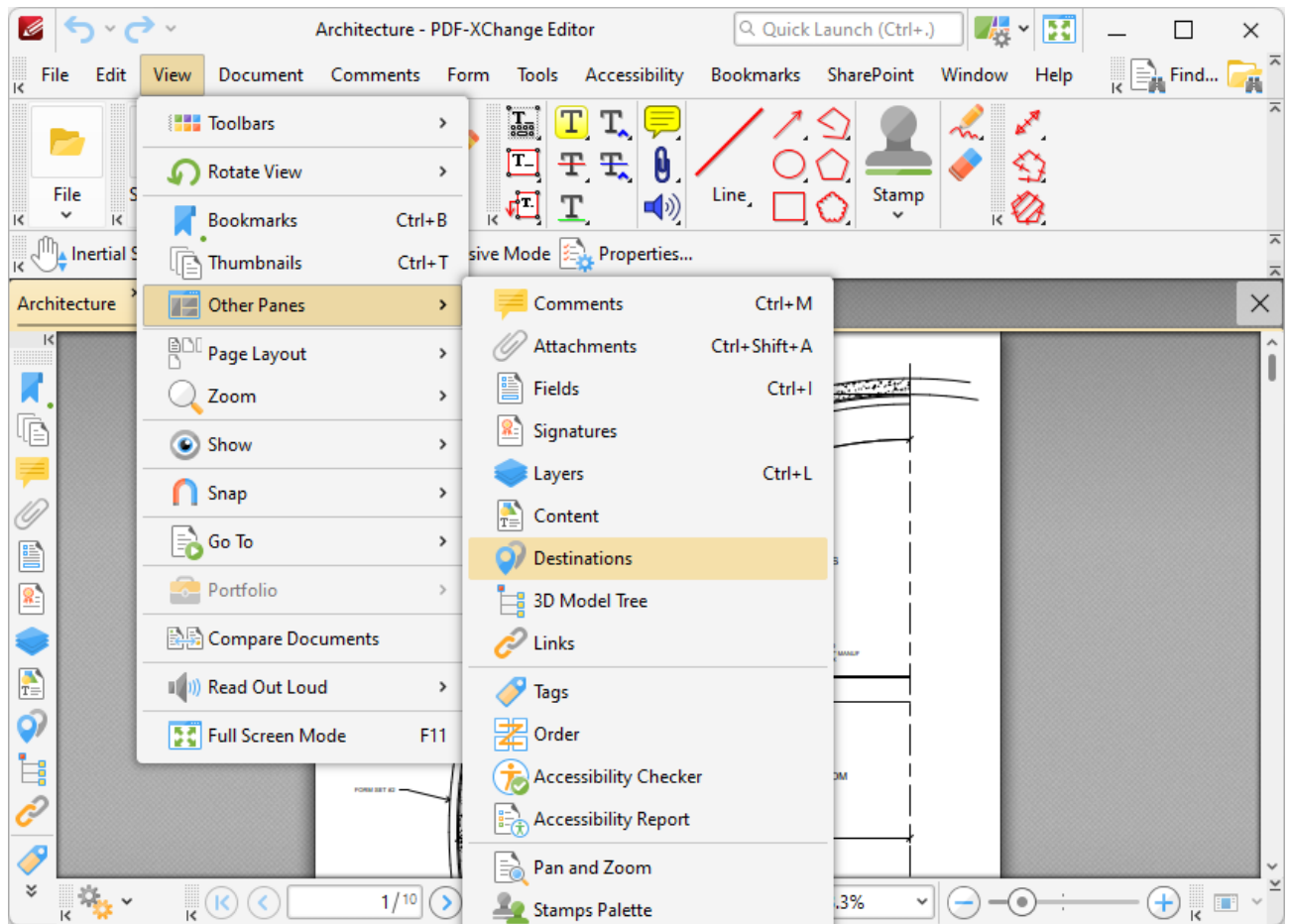
Figure 1. View Tab Submenu, Other Panes, Destinations

The **Named Destinations** pane is used to view/edit named destinations:
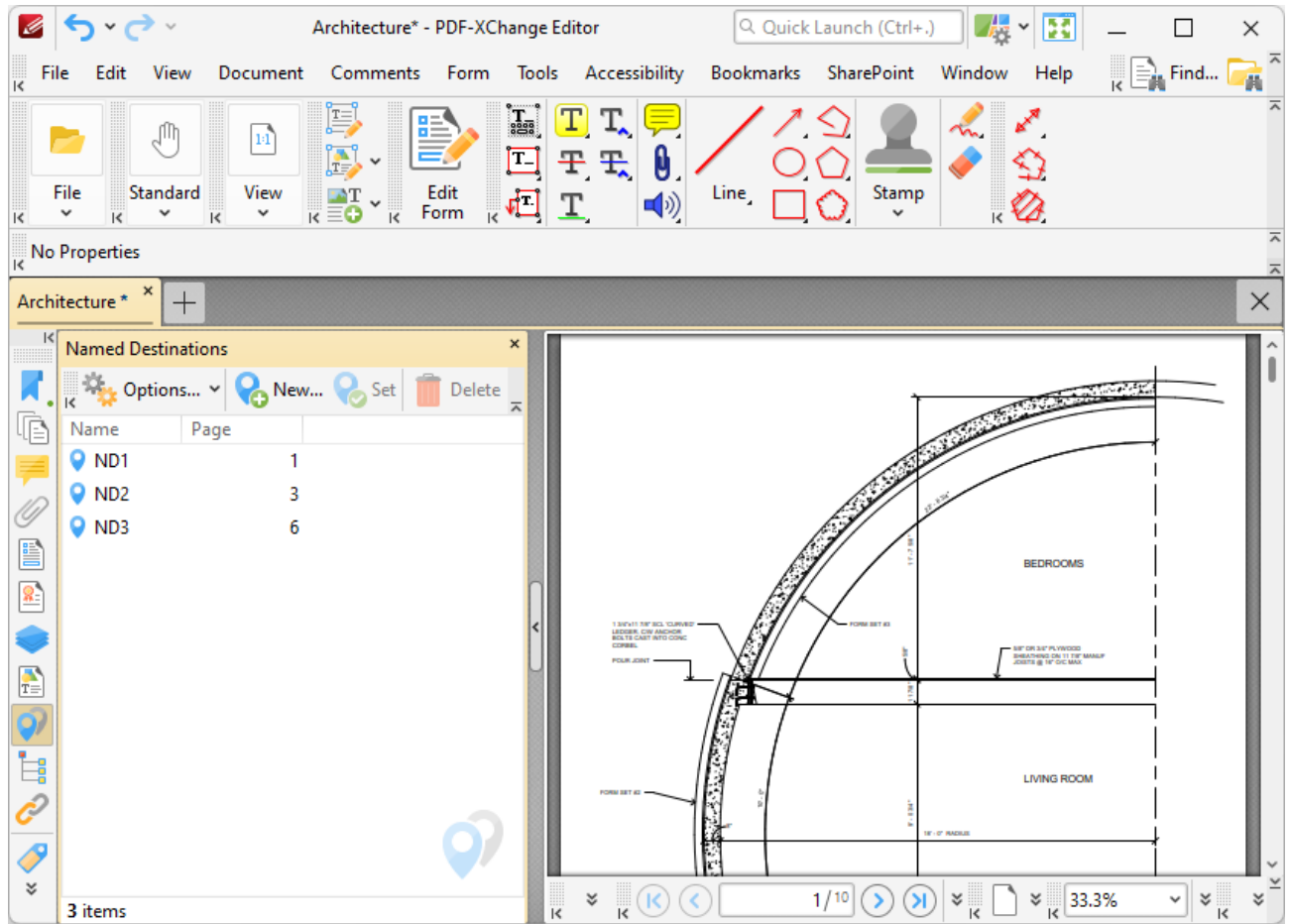
Figure 2. Named Destinations Pane

Named destinations are user-defined locations in documents. They can be used in conjunction with **Bookmarks,** 504 **Go To Page** 997 actions and the **/Open** 1114 command line to navigate to specified locations. Double-click named destinations to move to their location in the document. Use the icons in the **Named Destinations** pane to perform the following operations:

Click **New Destination** to create a new named destination from the current view.

Click **Set** to set the current view as the new view for the selected named destination.

Click **Delete** to delete selected named destinations.

Click **Options** for named destination options:
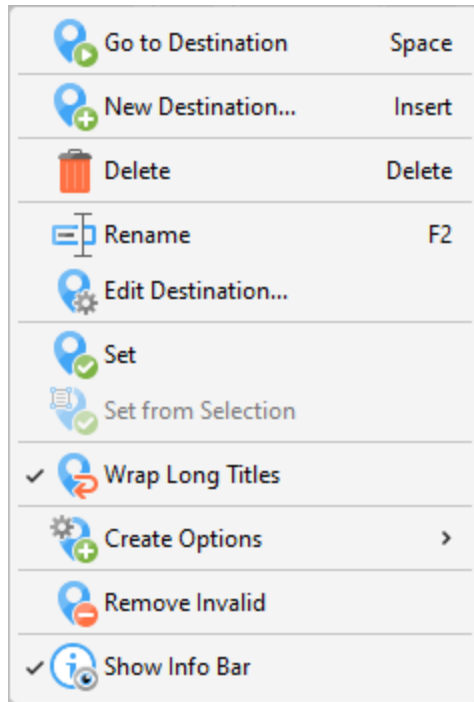
Figure 3. Named Destination Options

- Click **Go to Destination** to move to selected destinations.
- Click **New Destination** (or press Insert) to create a new named destination from the current view.
- Click **Delete** to delete selected named destinations.
- Click **Rename** to rename selected named destinations.
- Click **Edit Destination** to edit the location of the named destination, as detailed below.
- Click **Set** to set the current view as the target for the selected named destination.
- Click **Set from Selection** to set the current selection as the target for the selected named destination.
- Click **Wrap Long Titles** to spread long named destination titles over multiple lines.
- Click **Create Options** to view options for creating named destinations
  - Click **Use Inherited Zoom** to enable/disable inherited zoom in the creation of named destinations.
  - Click **Use Current Page** to specify the use of the current page for named destinations. If this option is not selected then the first visible page will be used.
  - Click **Use Selected Text** as title to use selected text as the title when creating new named destinations.
  - Click **Use Selected Region as Destination** to use selection regions as the destination when creating new named destinations.
- Click **Remove Invalid** to remove named destinations that do not have a valid destination.
- Click **Show Info Bar** to show/hide the information bar at the bottom of the **Named Destinations** pane.

Create Named Destinations from Selected Text

When you are creating named destinations, it is also possible to use the **Select Text Tool** to create a named destination from selected text in the current document. Follow the steps below to use this method to create named destinations:

1. Click the **Tools** tab, then click **Basic Tools** and click to enable the **Select Text Tool** and click and drag to highlight the text you want to use to create the named destination:
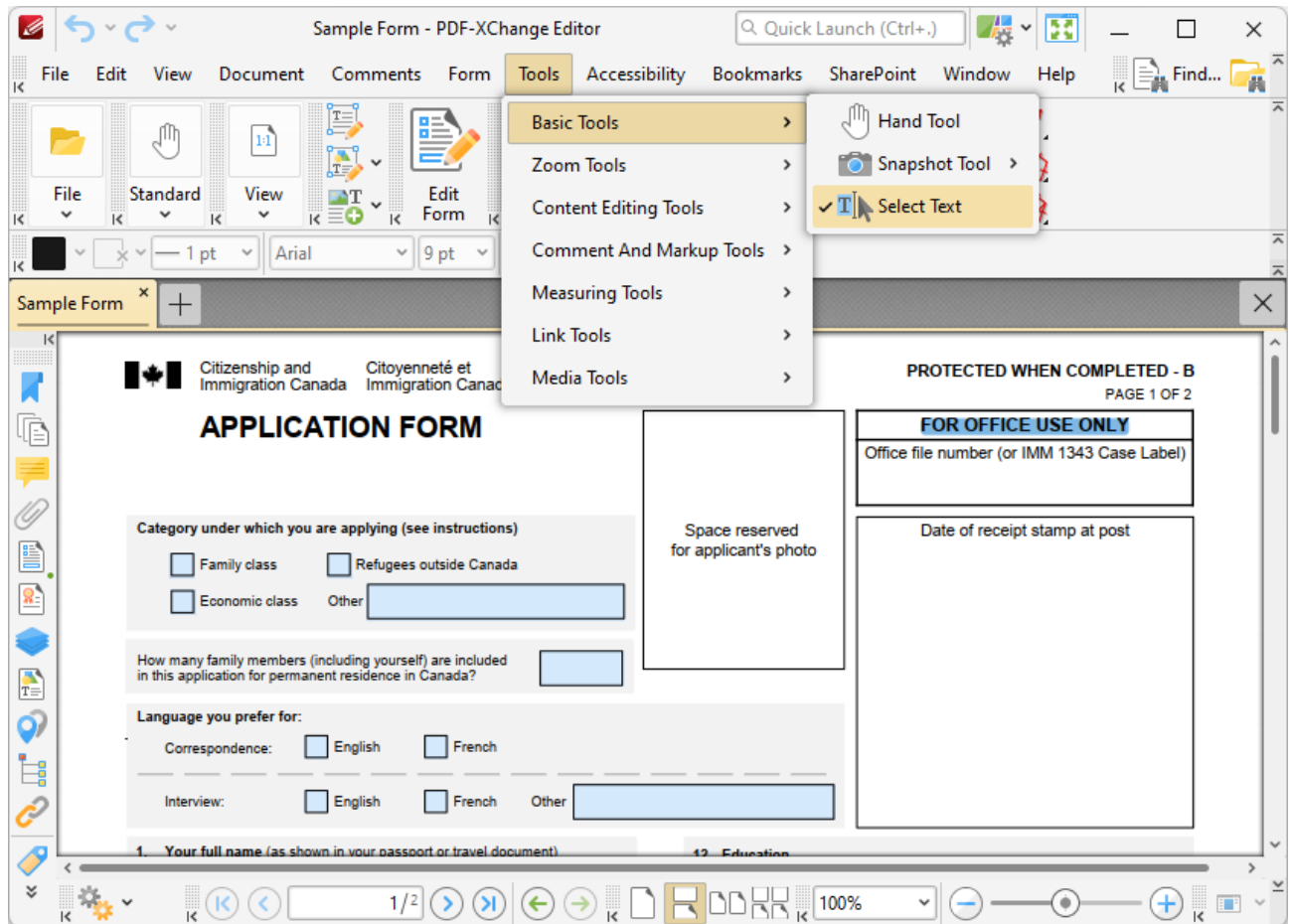
Figure 4. Home Tab, Select Text Tool Enabled, Text Highlighted

2. Click the **Destinations** shortcut in the **Quick Tools** toolbar to open the **Named Destinations** pane:
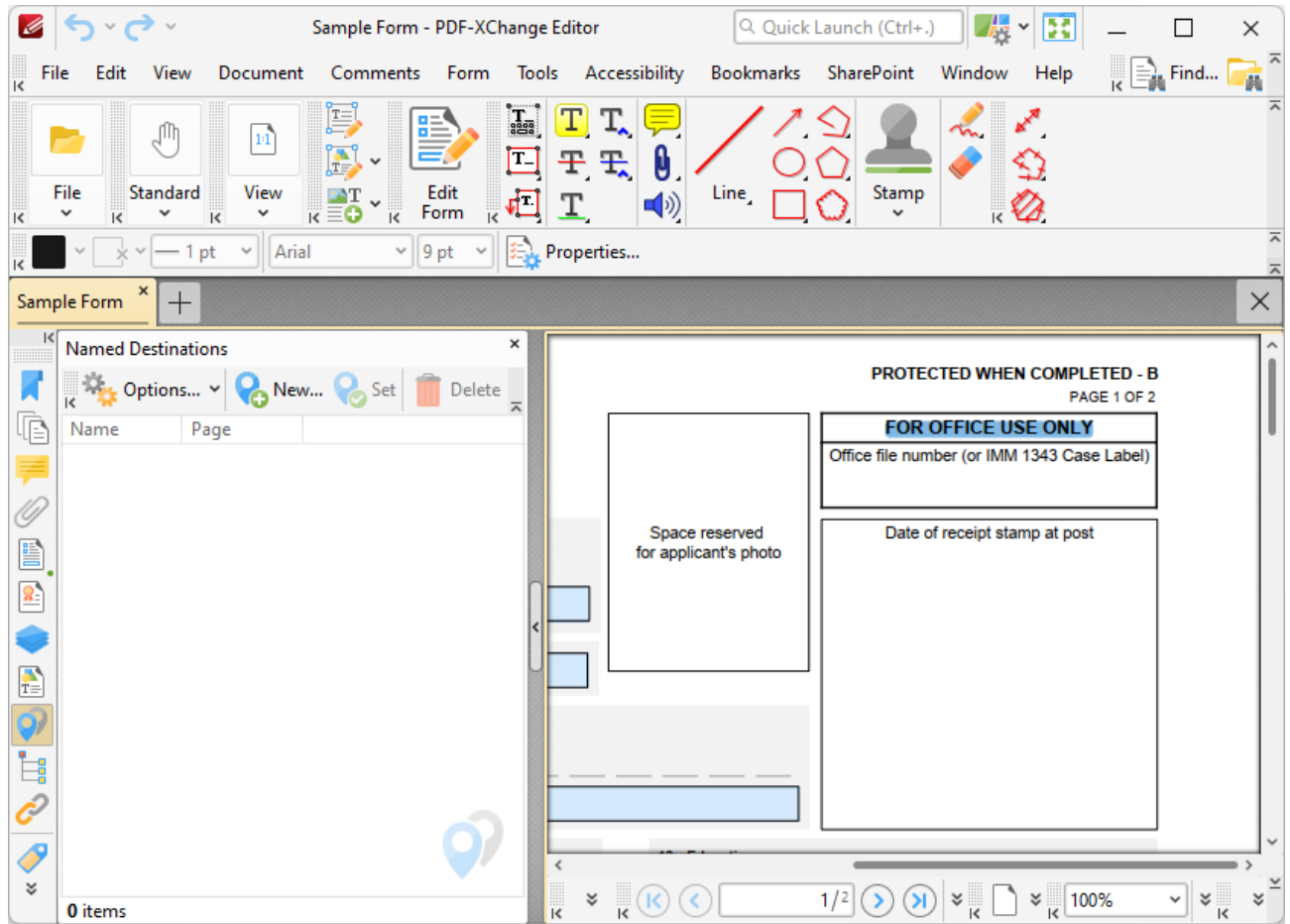
Figure 5. Named Destinations Pane Open

3. Click **New** in the **Named Destinations** pane to create a new named destination that uses the highlighted text as the name of the new named destination:
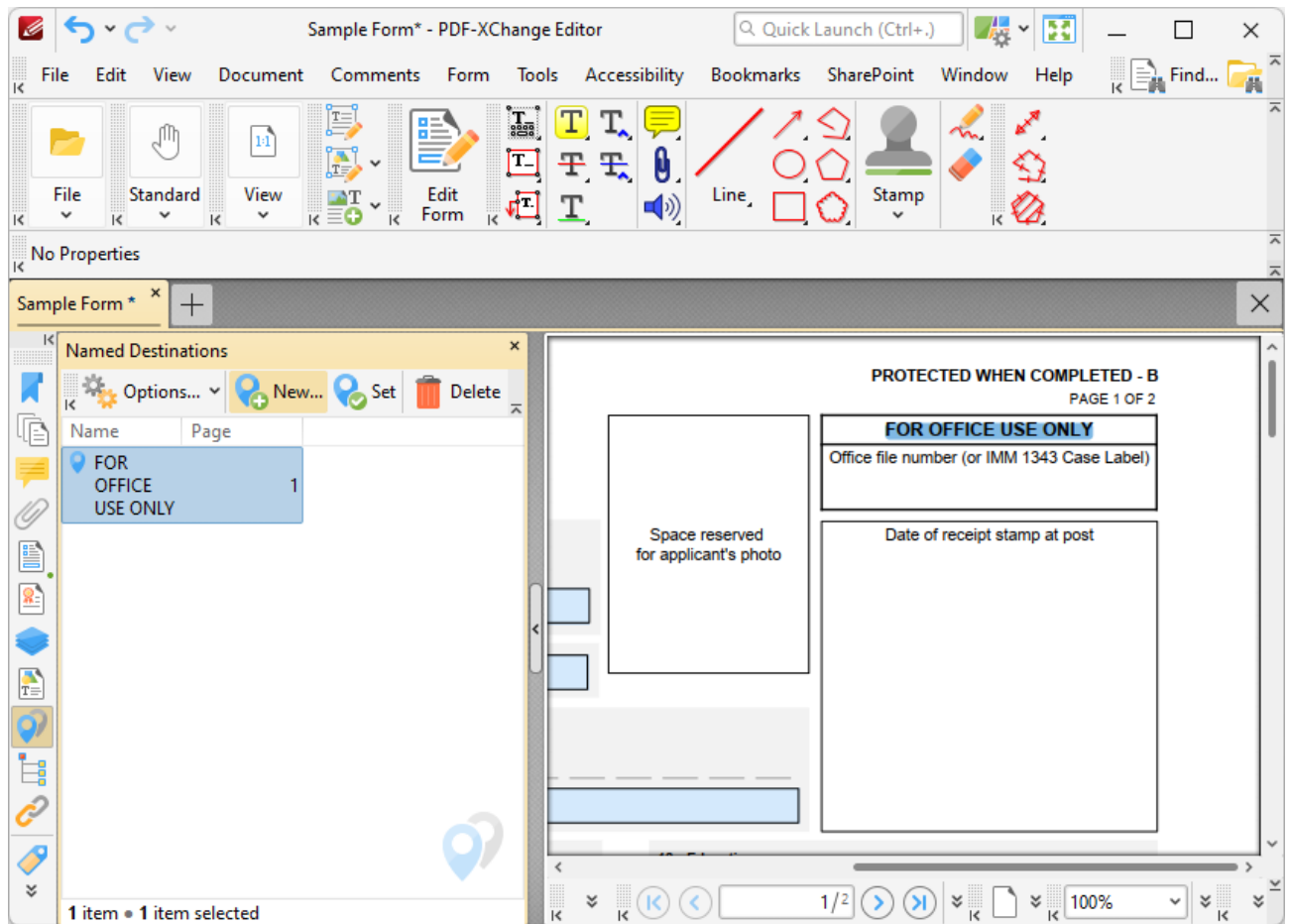
Figure 6. New Named Destination Created from Selected Text

Editing the Location of Named Destinations

Right-click named destinations in the **Named Destinations** pane and click **Edit Destination** to edit the location of named destinations:
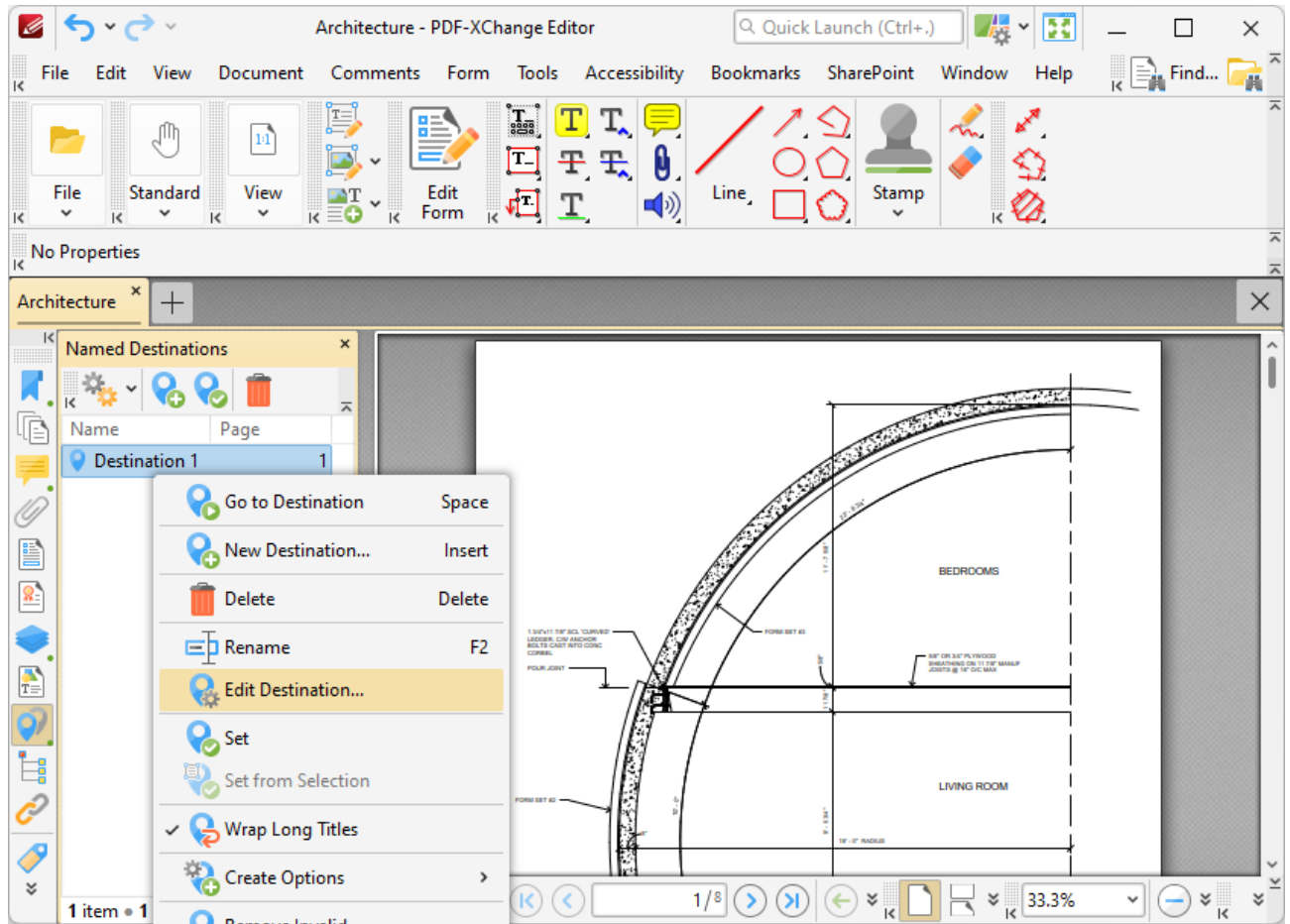
Figure 7. Named Destinations Submenu, Edit Destination Highlighted

The **Edit Destination** dialog box will open:
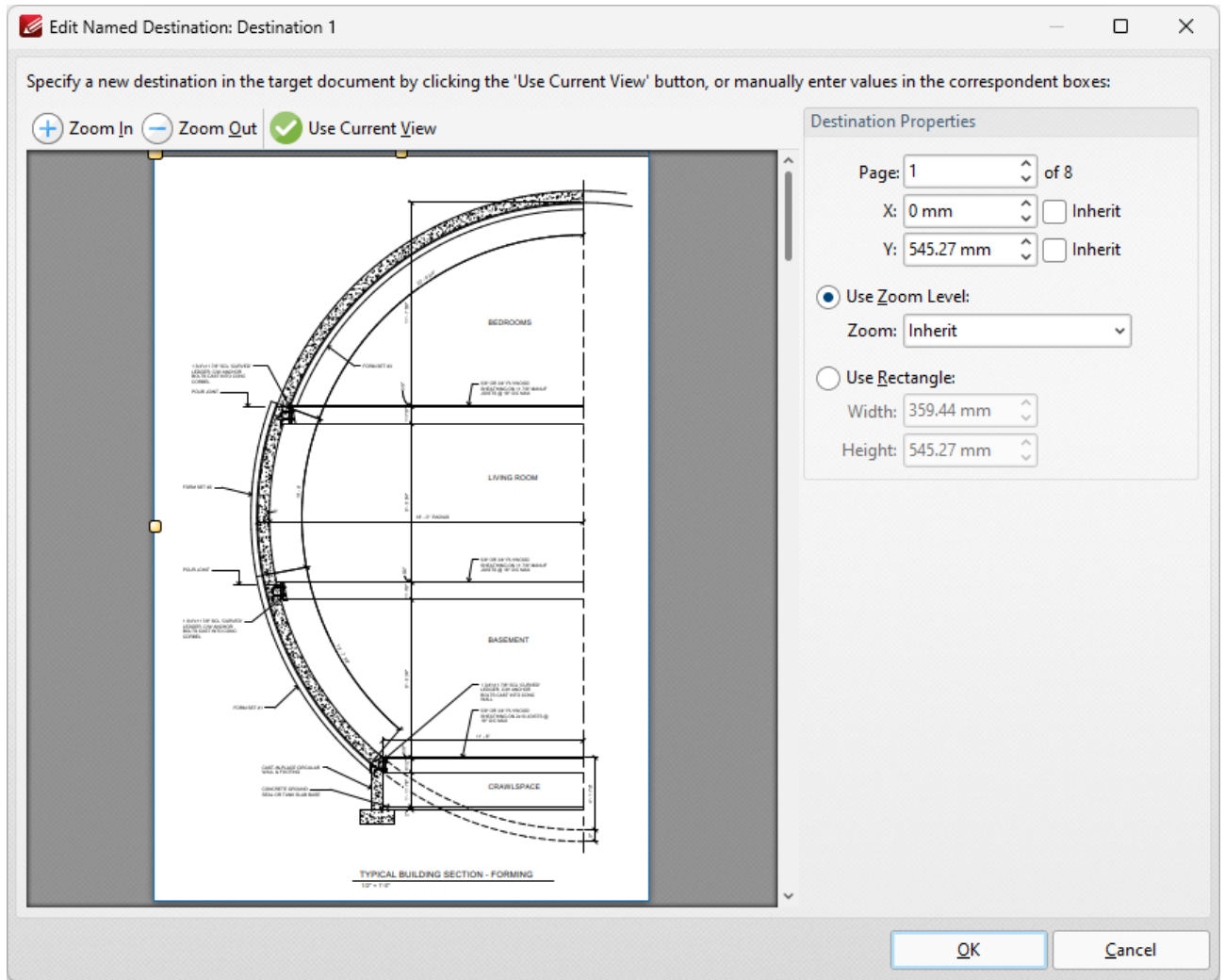
Figure 8. Edit Destination Dialog Box

- Use the **Page** dropdown menu to set the page number for the named destination.
- Use the **X** and **Y** dropdown menus to determine the X and Y coordinates of the named destination, or select the **Inherit** box to use the existing X/Y coordinates of the named destination.
- Select an option in the **Zoom** dropdown menu to determine the zoom used for the named destination. Alternatively, select the **Use Rectangle** button to specify a rectangle to use, then enter the desired dimensions in the **Width** and **Height** number boxes.
- Note that you can also click and drag the yellow points in the dialog box to specify X/Y coordinates/width and height values as desired.

Click **OK** to save changes.

5.3.5.8 3D Model Tree

3D Model Tree

Click **3D Model Tree** to open the **3D Model Tree** pane:
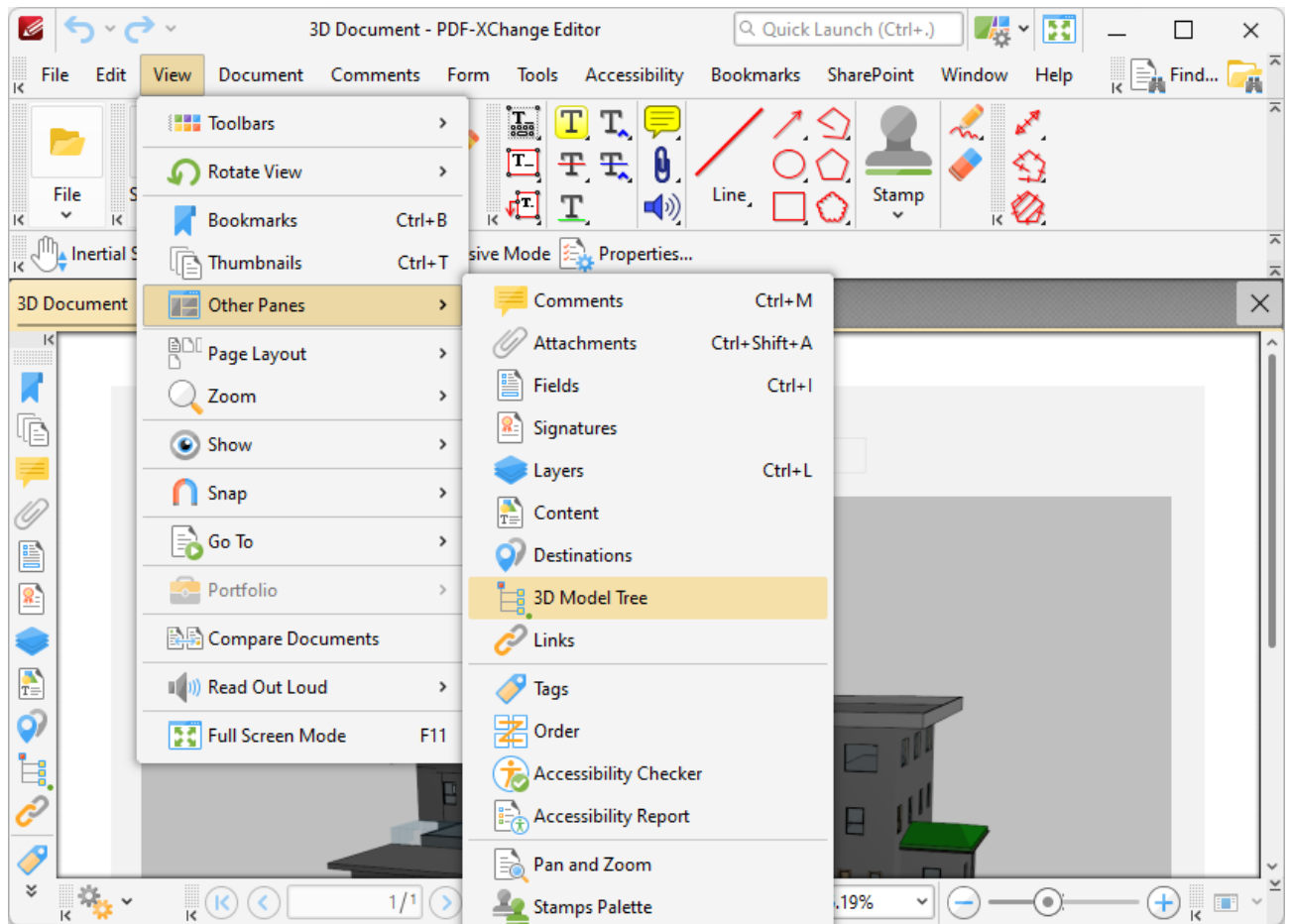
Figure 1. View Tab Submenu, Other Panes, 3D Model Tree

The **3D Model Tree** pane displays the hierarchy of selected 3D content in documents:
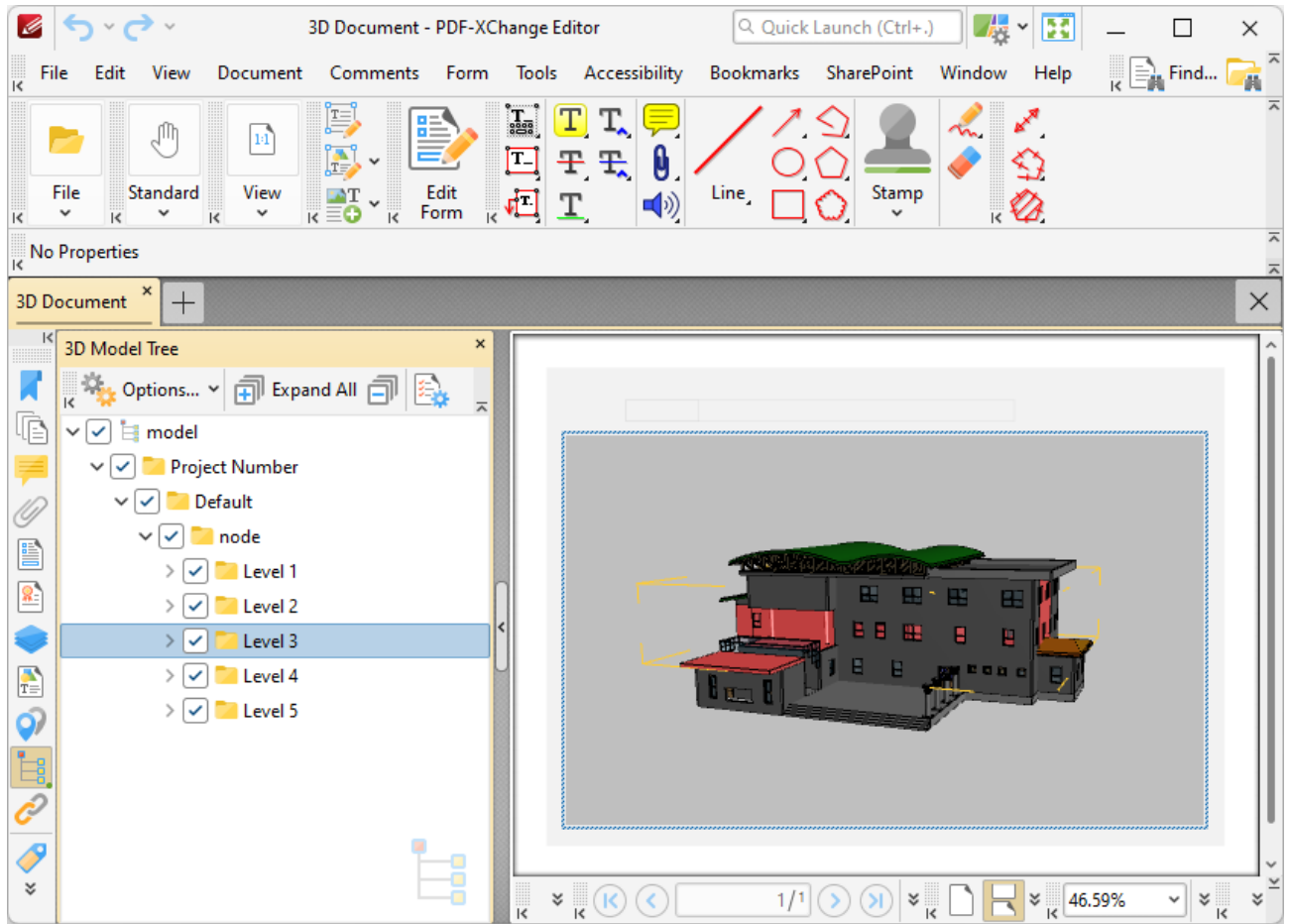
Figure 2. 3D Model Tree Pane

Note that it is necessary to click 3D content in order to select/activate them in documents. If 3D content is not selected then the **3D Model Tree** pane will be empty.

Click items in the **3D Model Tree** pane to select them in the document. Use the icons in the **3D Model Tree** pane to perform the following operations:

Click ⊞ **Expand All** to expand all branches in the **3D Model Tree** hierarchy.

Click ⊟ **Collapse All** to collapse all branches in the **3D Model Tree** hierarchy.

Click 🗎 **Properties** to view/edit the properties of selected content. The **3D Properties** pane will open. This pane details the status of properties for selected content:
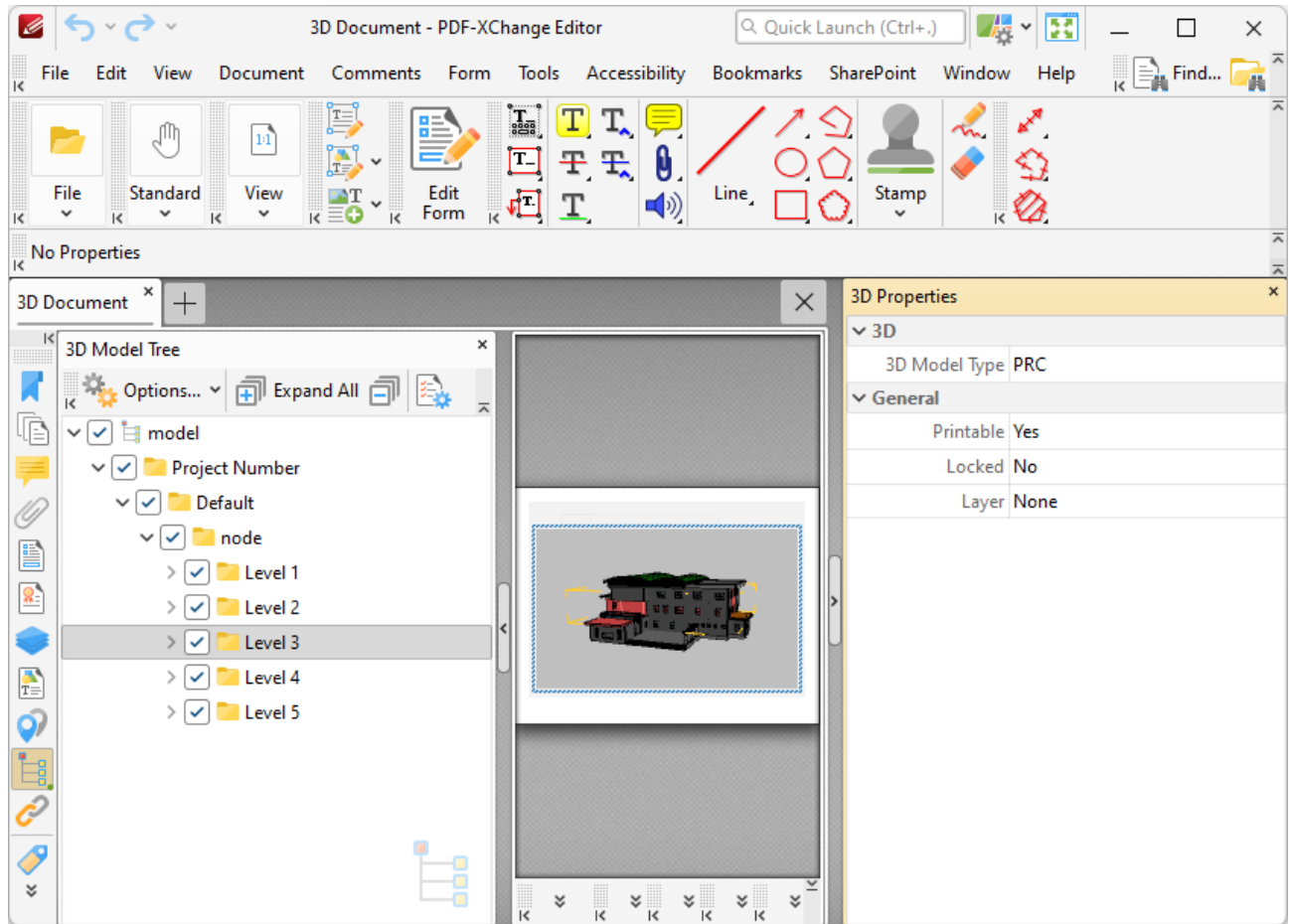
Figure 3. 3D Properties Pane

Click to edit properties as desired. Please note that not all properties are editable. The following properties are available for 3D content:

- **3D Model Type** displays the file format of the 3D content.
- **Printable** displays the print status of the 3D content. If this property is enabled then the comment is printed with the document. If this property is not enabled then it is not printed.
- **Locked** determines the locked status of the 3D content. If this property is enabled then the content cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** determines the optional content layer to which the 3D content belongs. Further information about layers is available **here.** [535]

Click **Options** to view/select 3D content item options:
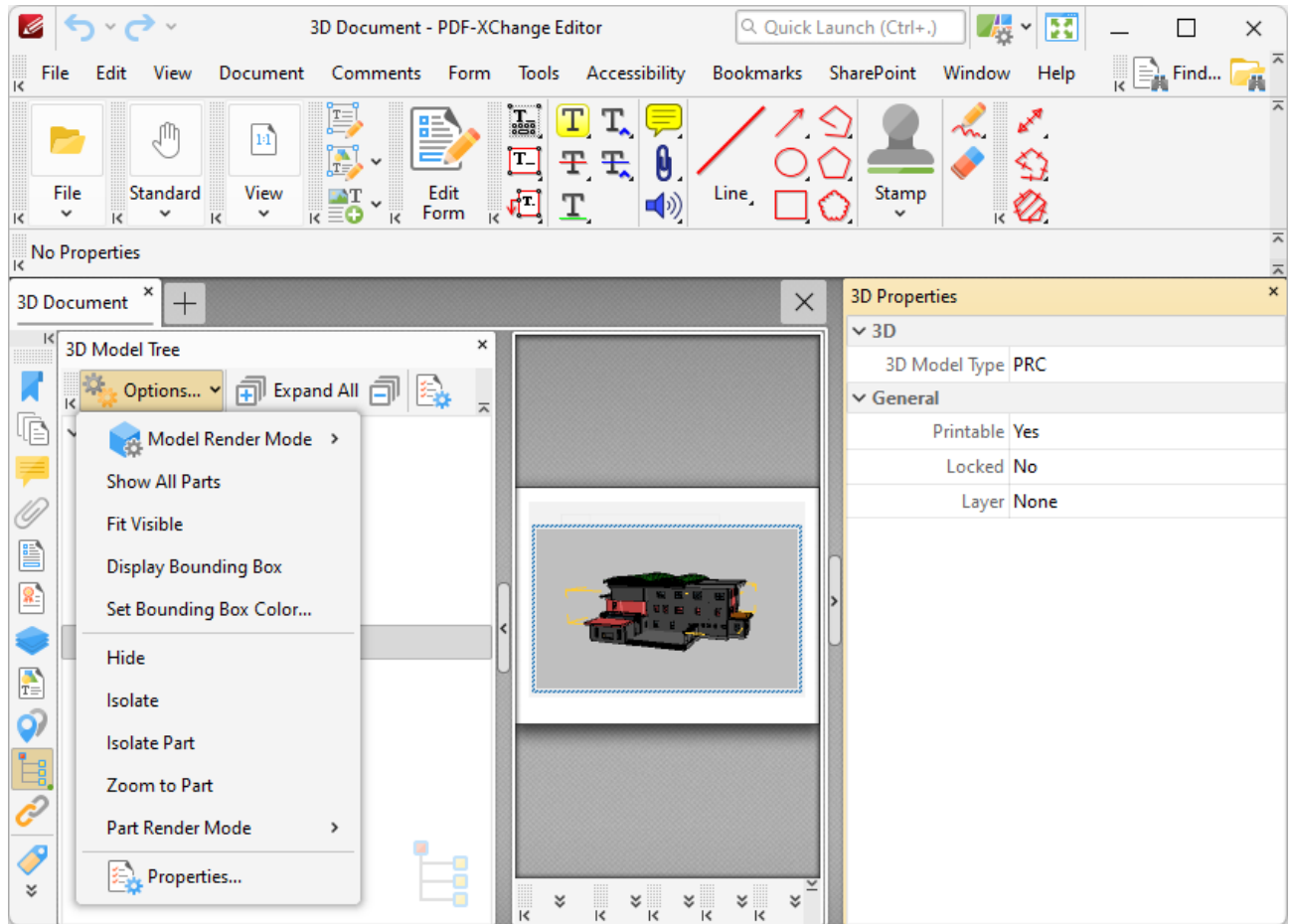
Figure 4. 3D Content Options

- Hover over **Model Render Mode** to view/select alternative rendering modes for the 3D content.
- Click **Show All Parts** to display all parts of the 3D content in the document.
- Click **Fit Visible** to zoom the view in order to display all 3D content.
- Click **Display Bounding Box** to display a bounding box around the 3D node selected in the **3D Model Tree** pane.
- Click **Set Bounding Box Color** to change the color of the bounding box around the 3D content.
- Click **Hide** to hide the node of the 3D content selected in the **3D Model Tree** pane.
- Click **Isolate** to display only the node of the 3D content selected in the **3D Model Tree** pane.
- Click **Isolate Part** to display only the part of the 3D content selected in the **3D Model Tree** pane. Note that parts are the parents of nodes in the **3D Model Tree** pane.
- Click **Zoom to Part** to zoom to the part selected in the **3D Model Tree** pane.
- Hover over **Part Render Mode** to view/select alternative rendering modes for the part of 3D content selected in the **3D Model Tree** pane.
- Click **Properties** to open the **3D Properties** pane, as detailed above.

5.3.5.9   Links

Links

Click **Links** to open the **Links** pane:
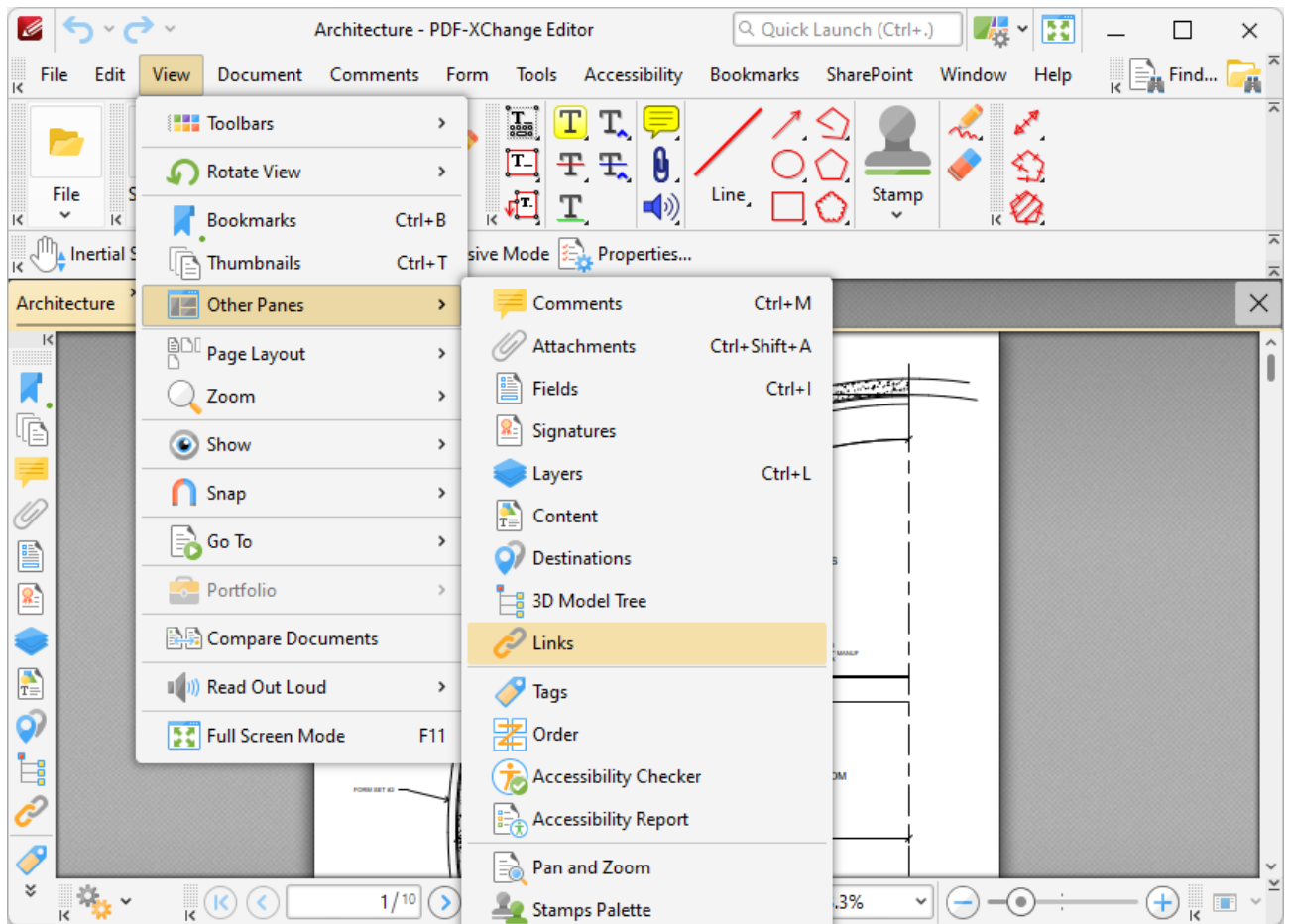
Figure 1. View Tab Submenu, Other Panes, Links

The **Links** pane displays links in documents:
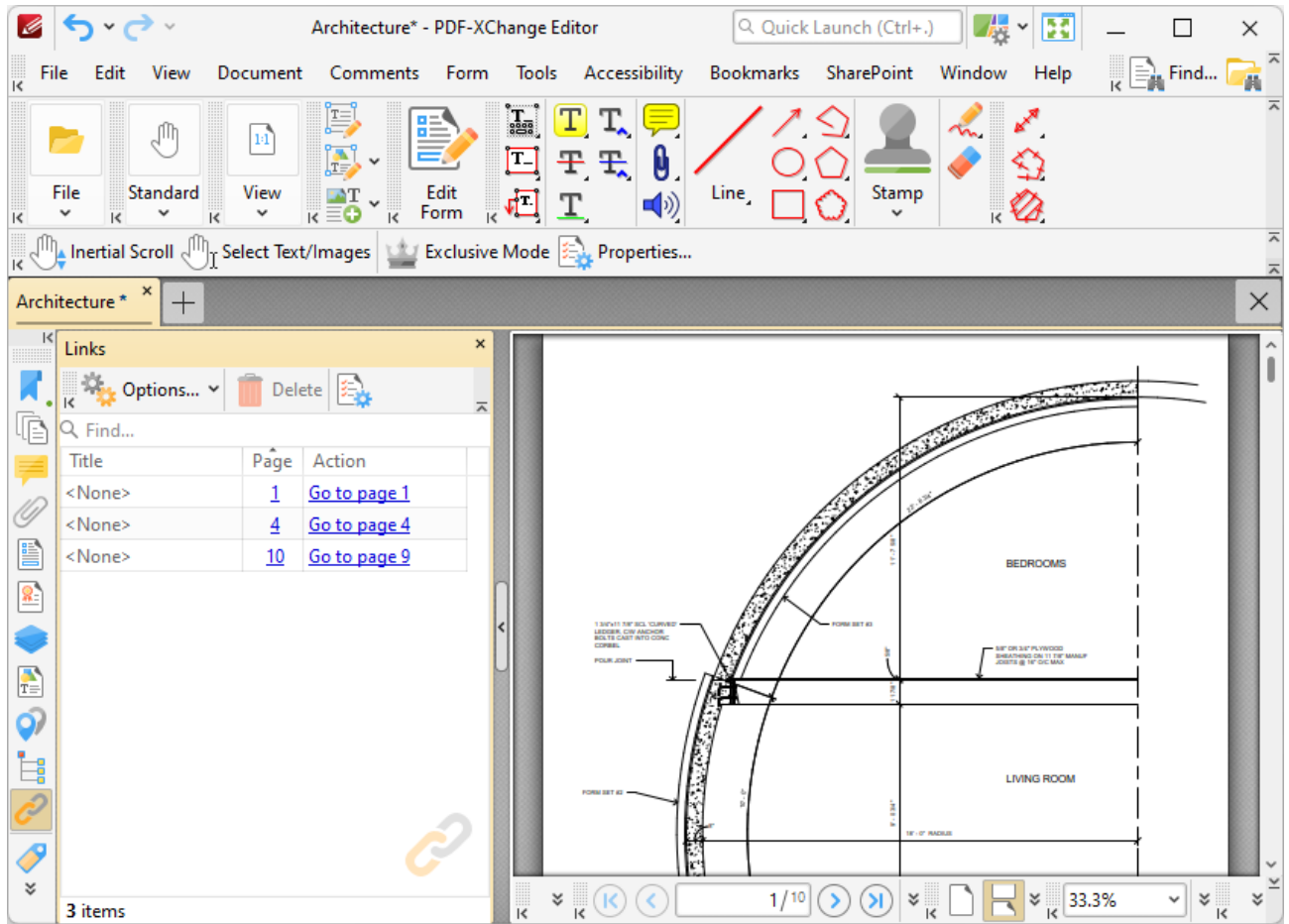
Figure 2. Links Pane

Click items in the **Links** pane to select them in the document. Use the icons in the **Links** pane to perform the following operations:

Click [icon] **Delete** to delete selected links.

Click [icon] **Properties** to view/edit the properties of selected links. The **Links** pane will open. This pane details the status of properties for links:
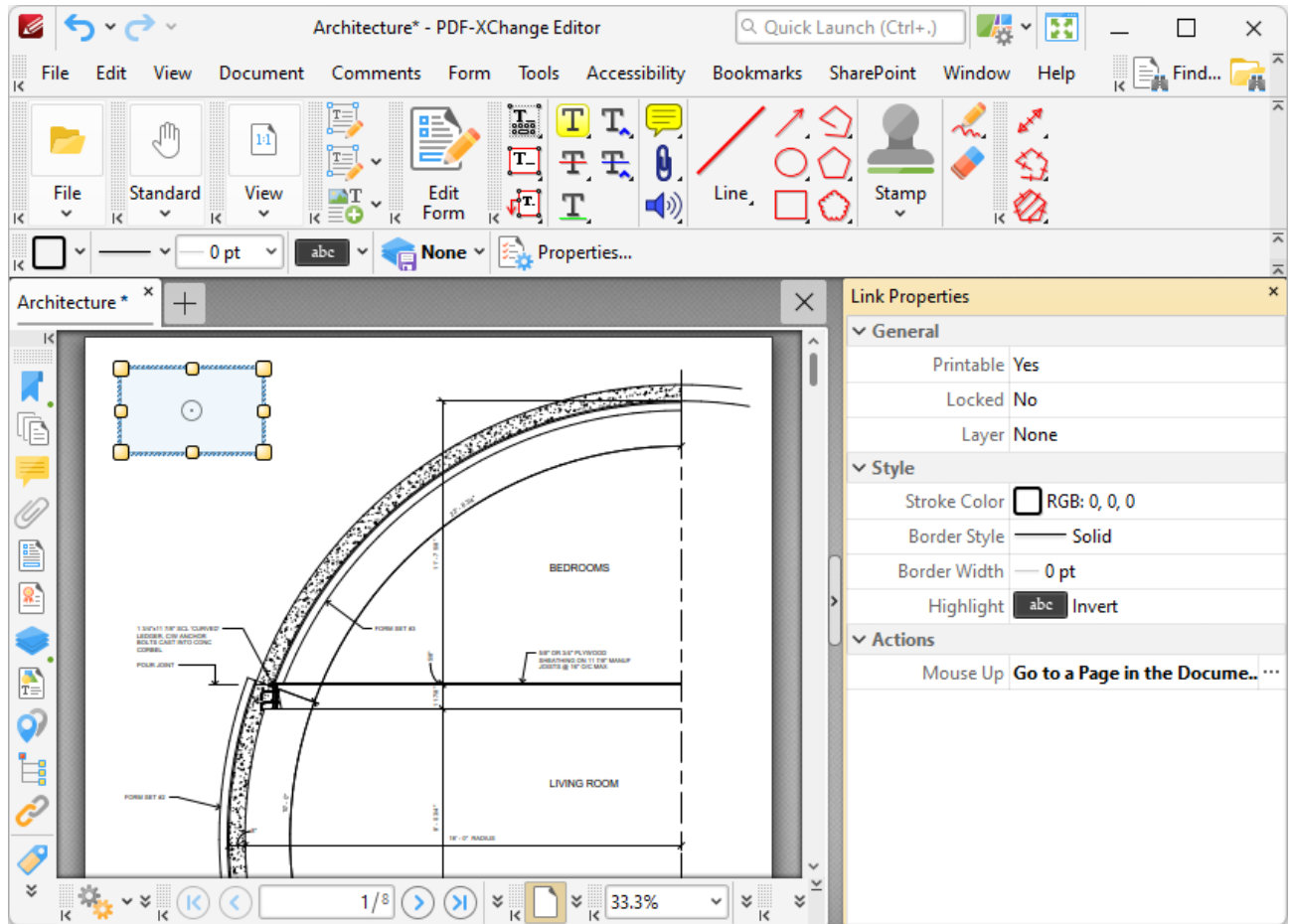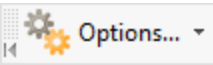
Figure 3. Link Properties Pane

Click to edit properties as desired. Please note that not all properties are editable. The following properties are available for links:

- **Printable** is the print status of the link. If this property is enabled then the link is printed with the document. If this property is not enabled then the link is not printed.
- **Locked** is the locked status of the link. If this property is enabled then the link cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the link belongs. Further information about layers is available **here.** 535
- **Stroke Color** determines the border color of the link.
- **Border Style** determines the border style of the link
- **Border Width** determines the border width of the link.
- **Highlight** determines the visual effect when the link is clicked.
- **Mouse Up** determines the action taken when the link is clicked. Click the ellipsis icon on the right of the action to view/edit/add actions, as detailed **here.** 992

Click **Options...** for link options:

Figure 4. Link Options

- Click **Cut, Copy** or **Delete** to perform these operations on selected links.
- Hover over **Current Layer** to view/edit the layer to which selected links belong.
- Hover over **Web Links** to view options for weblinks, then click **Create Web-Links from URLs** or **Remove All Web-Links** as desired. Further information about these features is available **here.** [989]
- Click **Wrap Long Titles** to spread the title of links over multiple lines in cases where links have long names.
- Click **Import/Export Links** to import links from/to file.
- Click **Export Links to CSV File** to export links to a CSV file.
- Click **Show Info Bar** to show/hide the info bar at the bottom of the pane.
- Click **Properties** to open the **Link Properties** pane, as detailed above.

5.3.5.10 Tags

Tags

Click **Tags** to open the **Tags** pane:
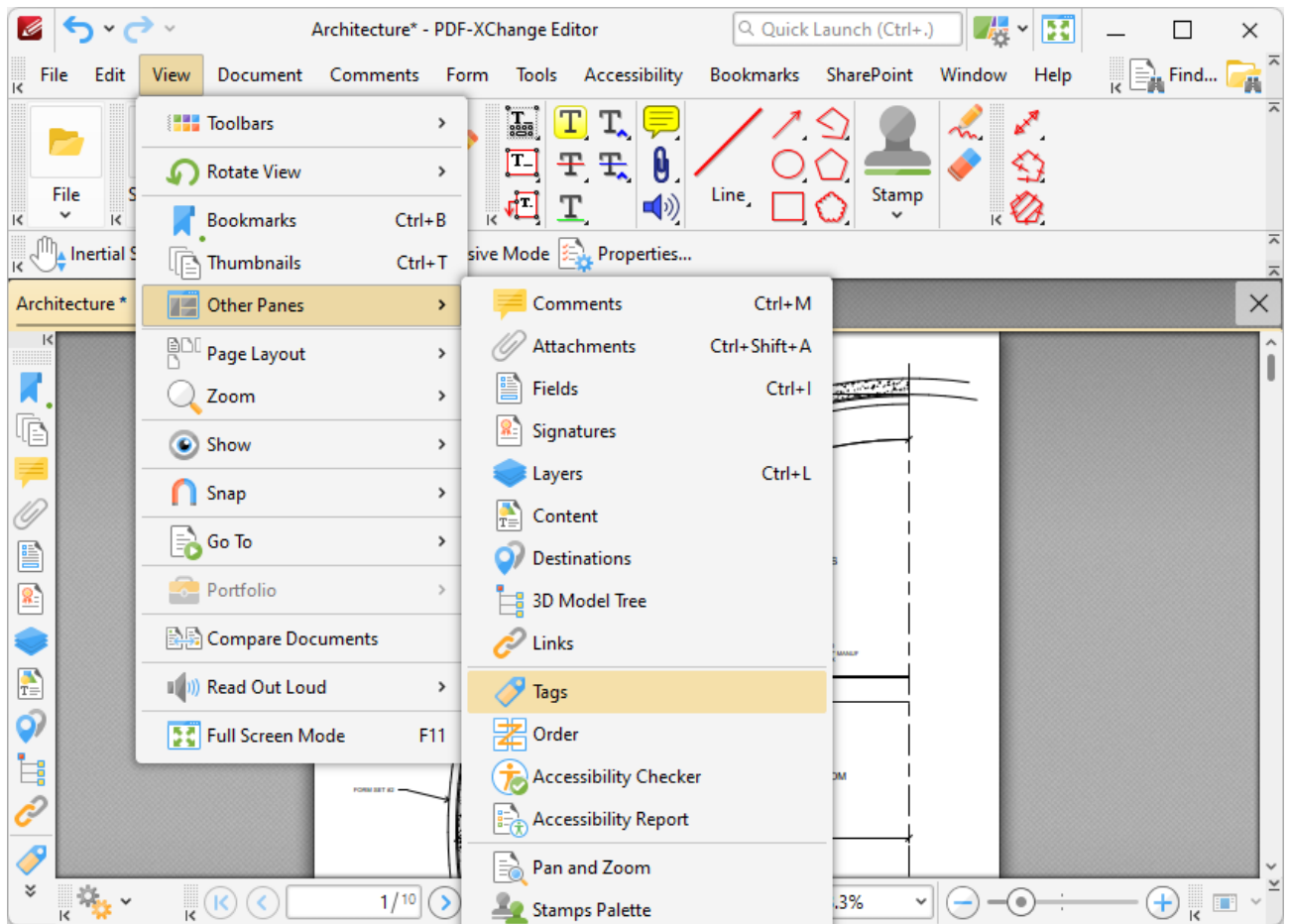
Figure 1. View Tab Submenu, Other Panes, Tags

The **Tags** pane displays tags in documents:
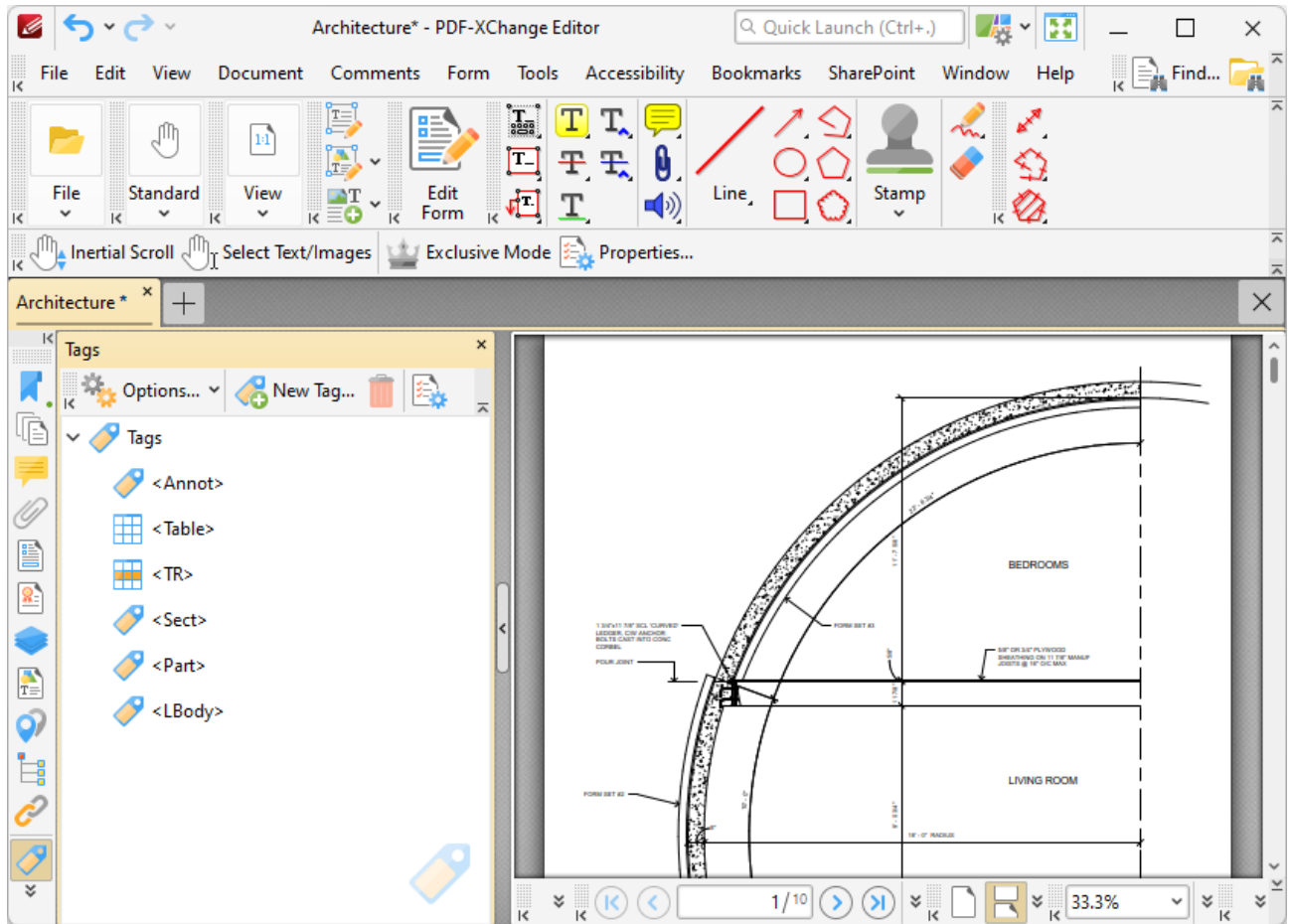
Figure 2. Tags Pane

Use the icons in the **Tags** pane to perform the following operations:

Click [icon] **New Tag** to create a new tag. The **New Tag** dialog box will open. Select the type of tag you want to create, then enter a title for the tag and click **OK** to create it.

Click [icon] **Delete** to delete selected tags.

Click [icon] **Properties** to view/edit the properties of selected tags. The **Tag Properties** pane will open. This pane details the status of properties for tags:
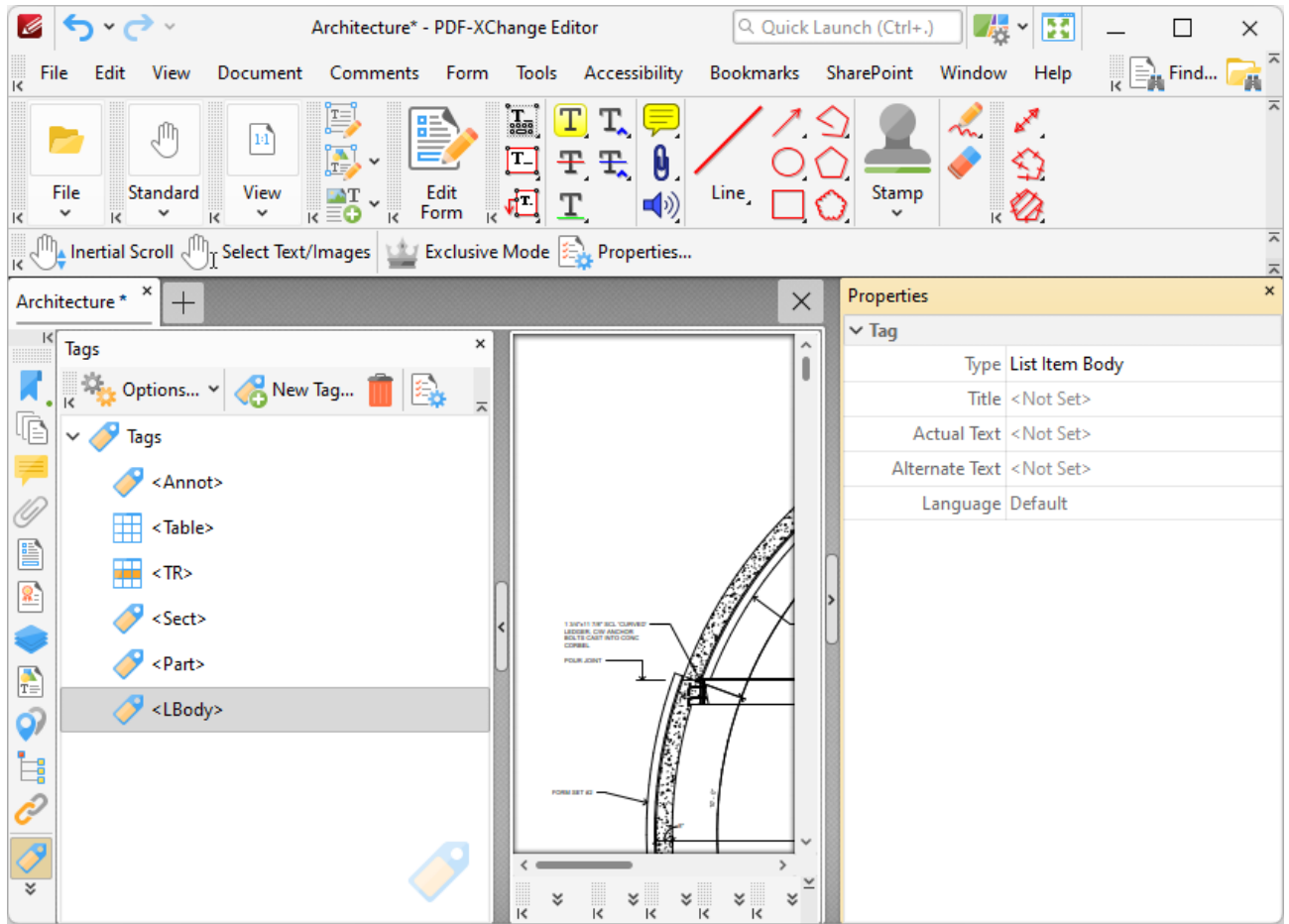
Figure 3. Tag Properties Pane
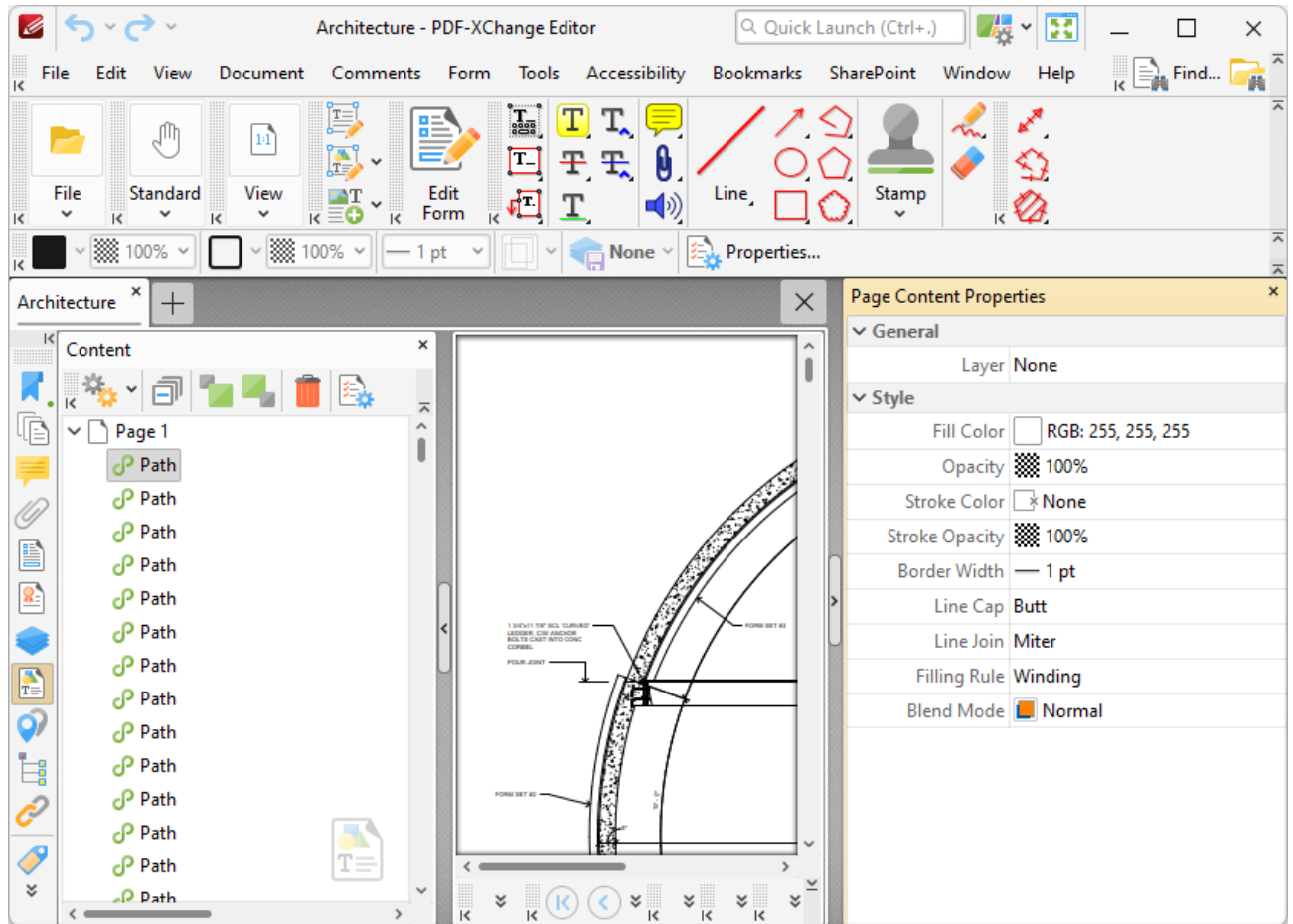
Click to edit properties as desired. The following properties are available for tags:

- **Type** is the tag type.
- **Title** is the name of the tag.
- **Actual Text** is the actual text in cases where the tagged content is text-based.
- **Alternate Text** is alternate text to the actual text. This is a necessary requirement of tagged content in documents in order to pass accessibility checks.
- **Language** is the specified language of the tag.

Click **Options** to view/edit tag options:
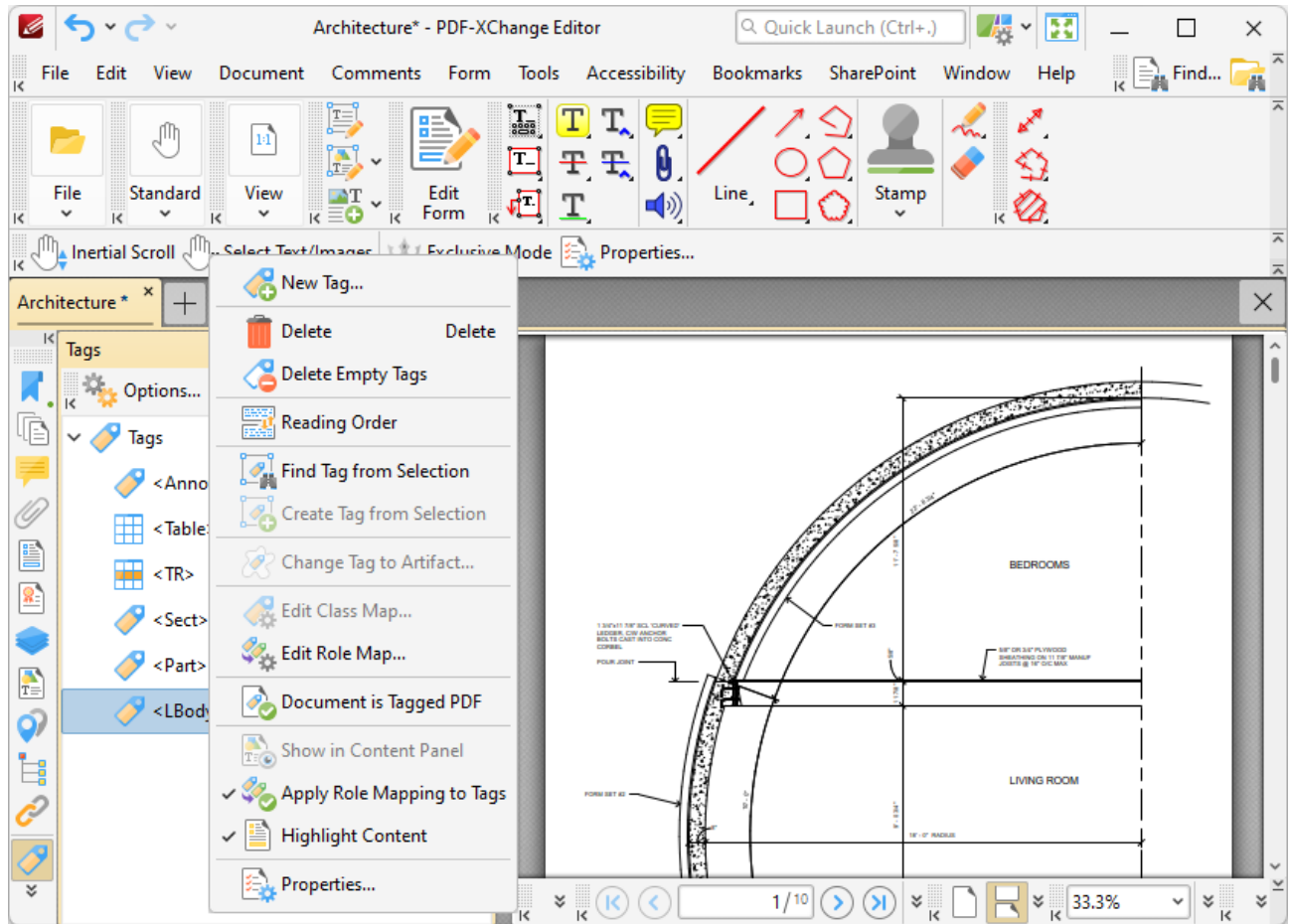
Figure 4. Tag Options

- Click **New Tag** to create a new tag, as detailed above.
- Click **Delete** to delete selected tags.
- Click **Delete Empty Tabs** to delete empty tags.
- Click **Reading Order** to determine the reading order of tags. The **Order** tab will open, as detailed **here.** 574
- Click **Find Tag from Selection** to search for the tag that contains the text/object selected in the document.
- Click **Create Tag from Selection** to create a tag from selected document content.
- Click **Change Tag to Artifact** to change selected tags to artifacts. Artifacts are ignored by screen readers and other assistive technologies.
- Click **Edit Class Map** to create, edit or delete the class map (style dictionary) of the document.
- Click **Edit Role Map** to create, edit or delete the role map of the document. Role maps allow documents to contain a unique tag set definition. It is easier to identify and edit custom tags when they are mapped to predefined tags.
- Click **Document is Tagged PDF** to add/remove a flag to the document that recognizes it as a tagged PDF.
- Click **Show in Content Panel** to display the content of selected tags in the **Content** 548 pane.
- Click **Apply Role Mapping to Tags** to enable/disable the application of role mapping to tags.

- Click **Highlight Content** to enable/disable the highlighting of document content that is associated with tags when those tags are selected in the **Tags** pane.
- Click **Properties** to view/edit the **Properties** pane for tags, as detailed above.

5.3.5.11 Order

Order

Click **Order** to open the **Order** pane:
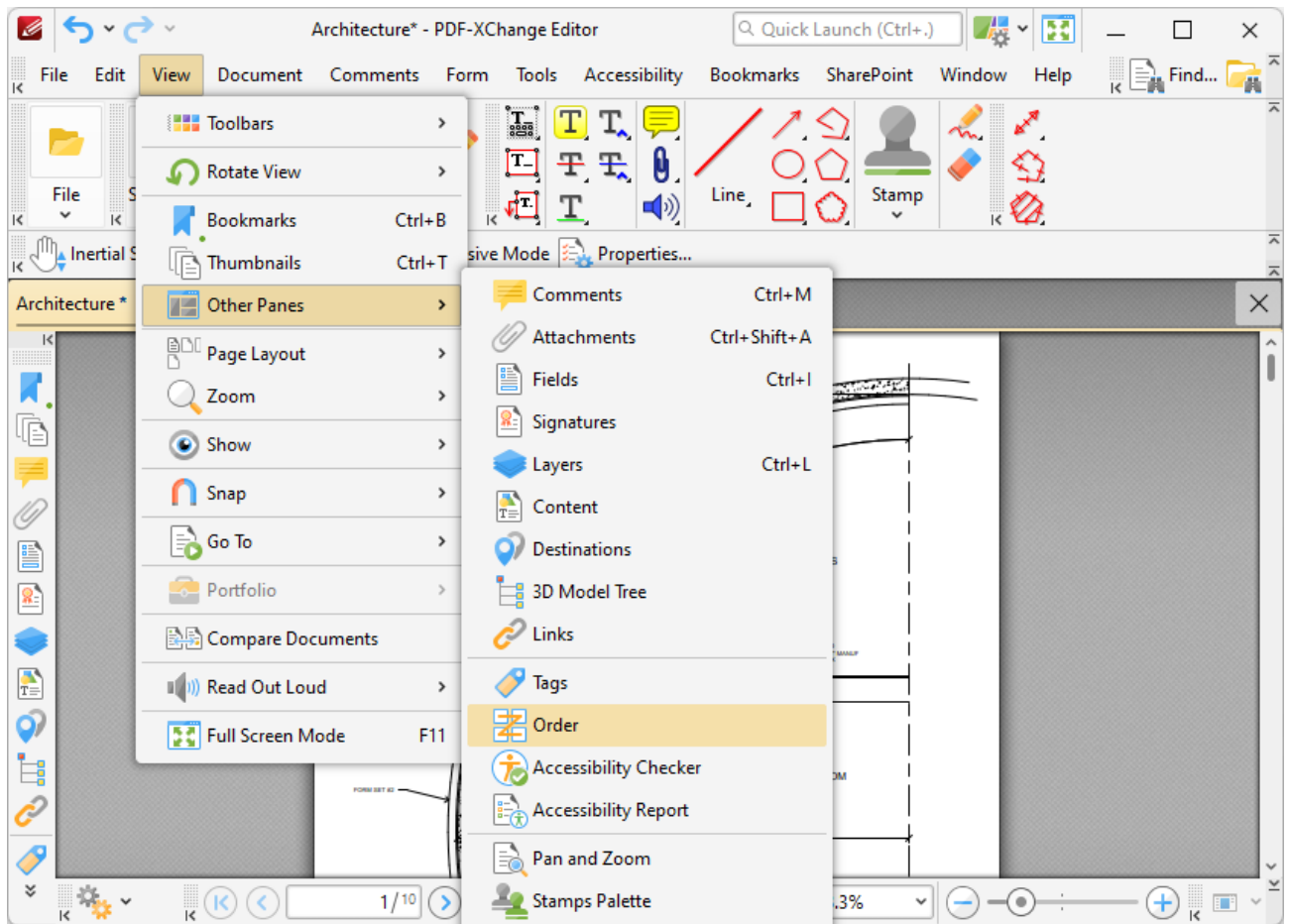
Figure 1. View Tab Submenu, Other Panes, Order

The **Order** pane displays the reading order for document tags:
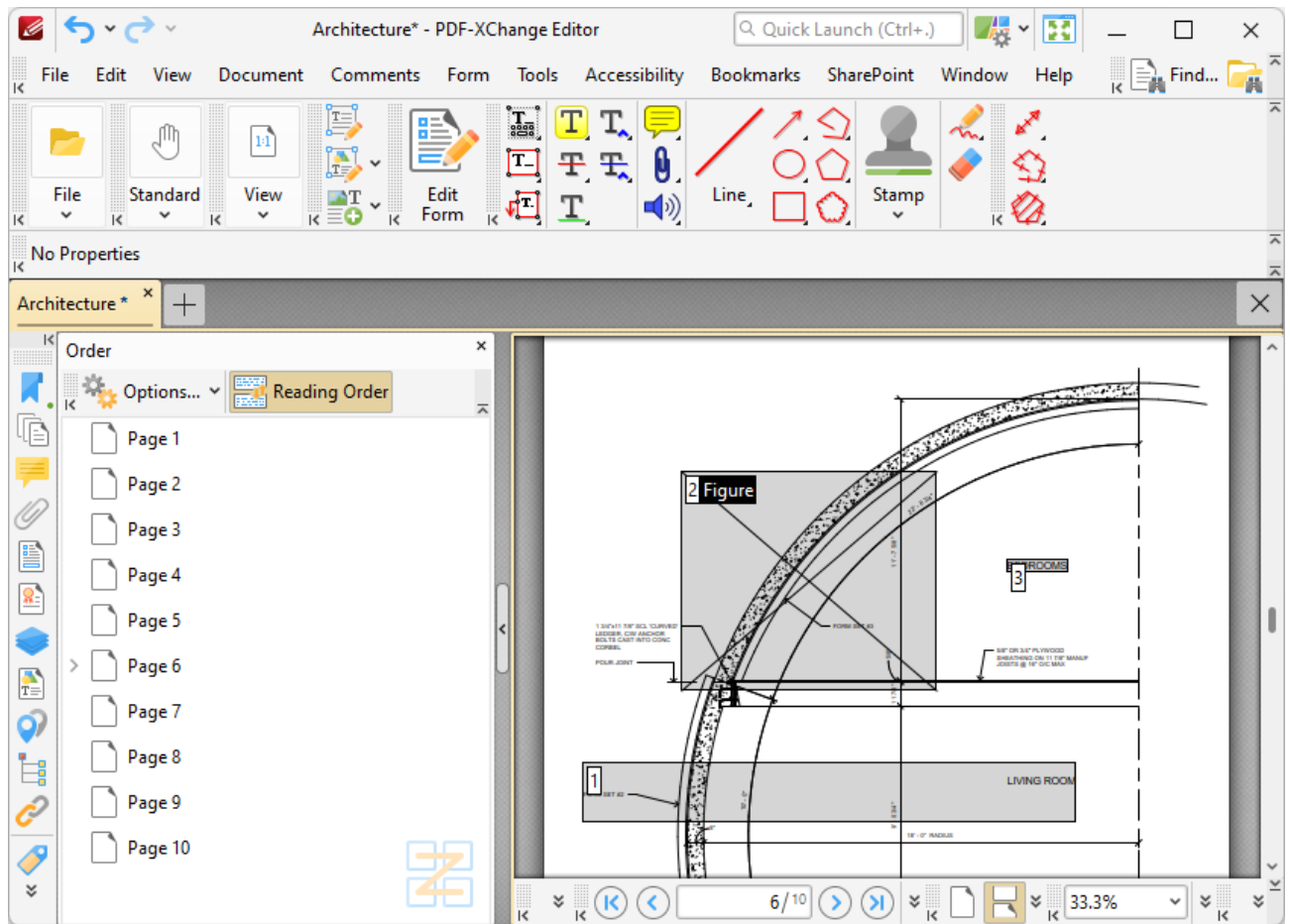
Figure 2. Order Pane

Click and drag items in the **Order** pane to determine the reading order of tagged items in the document. Click **Reading Order** to create/customize tags, as detailed below.

Click **Options** for additional options:
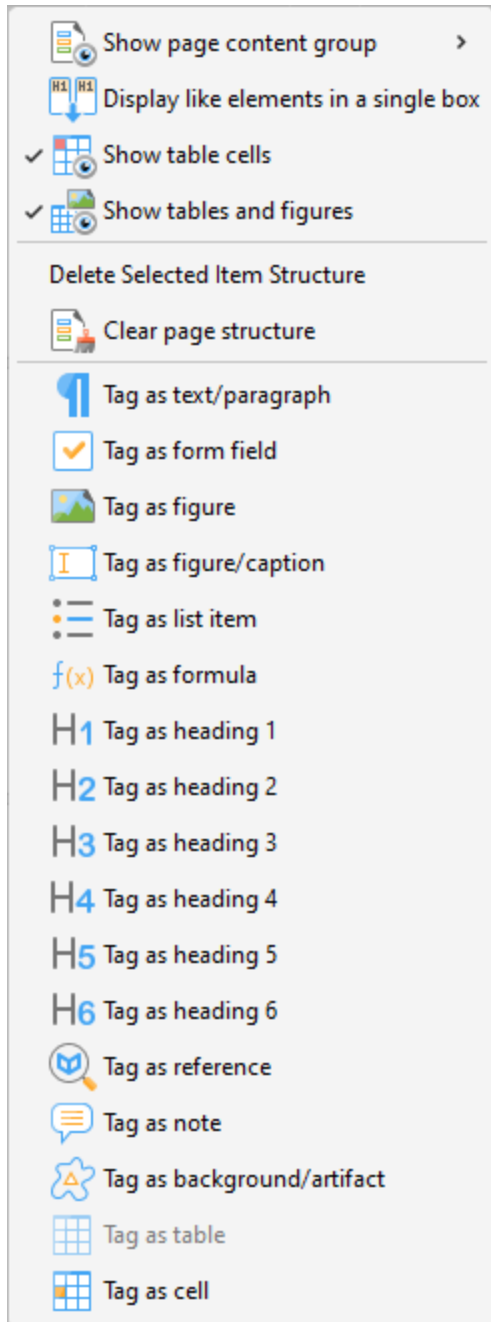
Figure 3. Options Submenu

- Click the **Show page content group** dropdown menu, then click **Page content order, Structure types** or **None** in the submenu to determine the page content groups that are displayed in the document.
- Click **Display like elements in a single box** to display elements of the same type in a single box.
- Click **Show table cells** to display content that has been tagged as a table cell in the document.
- Click **Show tables and figures** to display content that has been tagged as a tables or figure in the document.

- Click **Delete Selected Item Structure** to delete selected item structures.
- Click **Clear page structure** to delete the page structure.
- When the **Reading Order** feature is enabled in the **Order** pane, click and drag to select document content and then use the tagging options in the **Options** dropdown menu to specify how you want to tag the document content.

Setting a Reading Order and Determining Tags

Specifying a reading order for document content and tagging document structure is necessary in order to meet accessibility requirements. Follow the steps below to set a reading order and determine tags for documents:

1. Open the **Order** [574] pane and click the **Reading Order** button.

2. Click and drag to determine the first location of the reading order. Highlights will appear around the selected content:
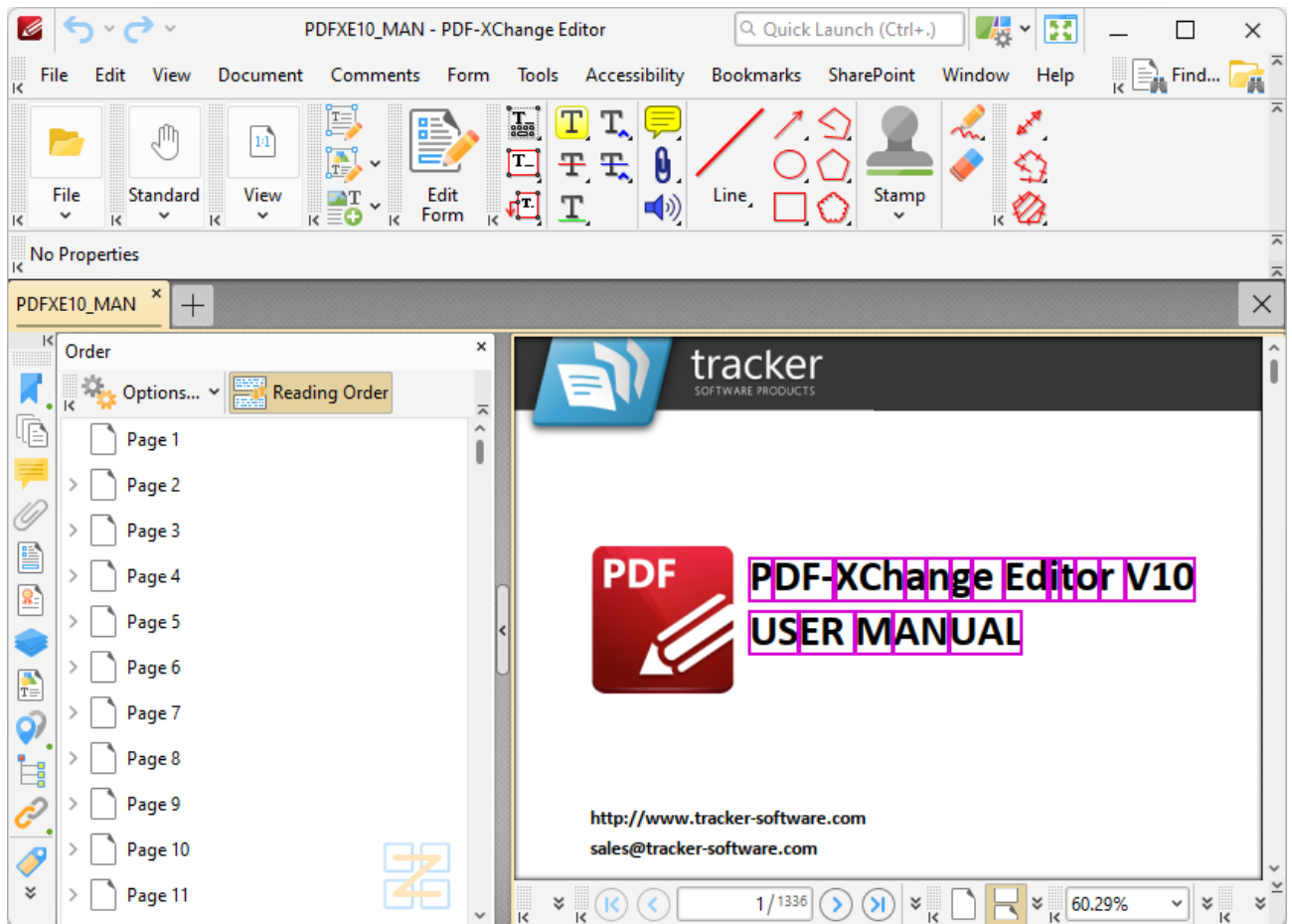
Figure 2. Active Reading Order Determination

3. Right-click and select the type of tag that you want to apply to the selected area. The first item in the reading order will then be defined, and the tag will be applied to the document and detailed in the **Tags** pane:
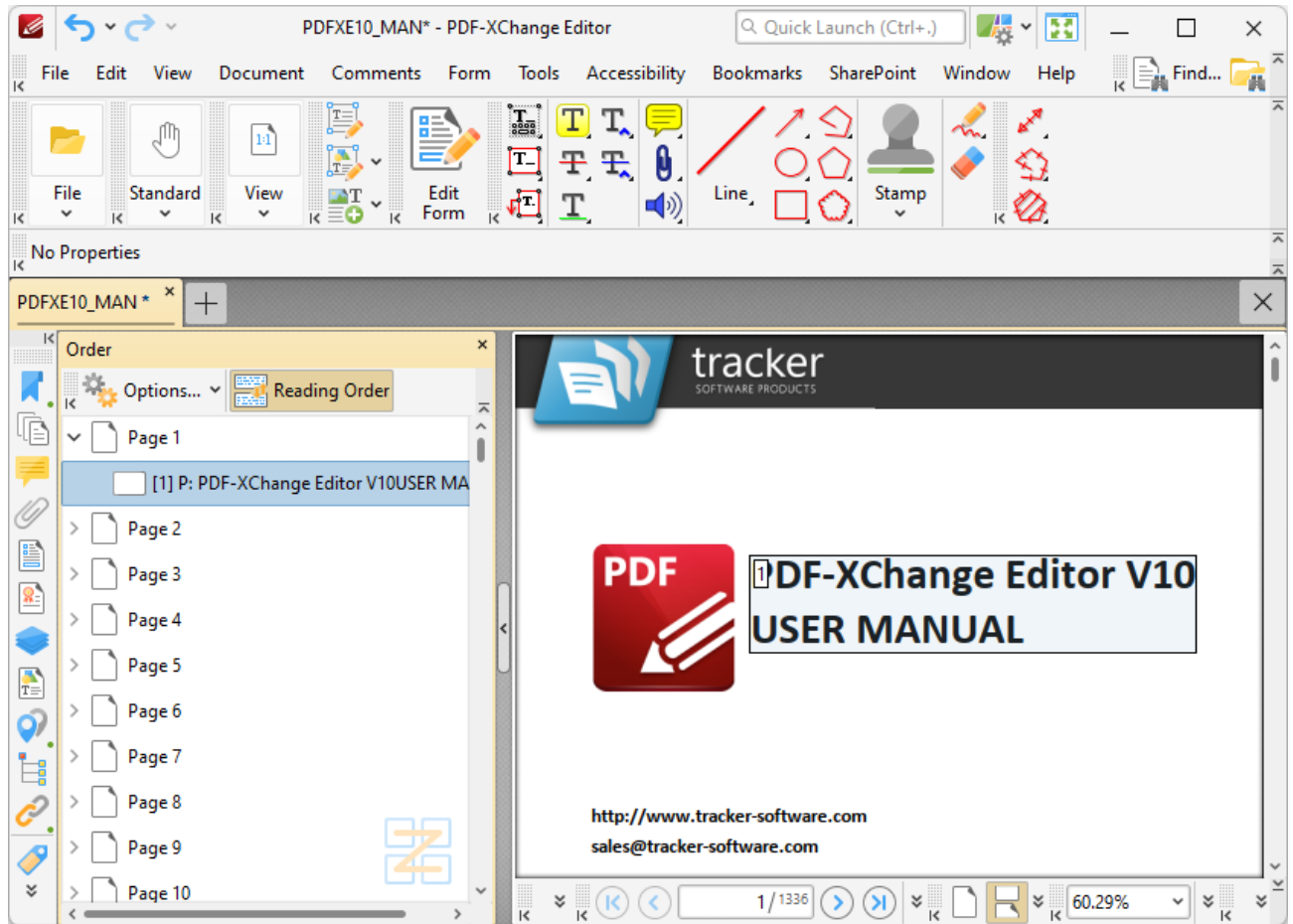
Figure 3. Tag Applied to Document Content

4. Repeat this process until all necessary document content is tagged and ordered.

Note that you can use the settings in the **Options** dropdown menu detailed in *(figure 3)* above to interact with tagged document content.

5.3.5.12 Accessibility Checker

Accessibility Checker

Click **Accessibility Checker** to open the **Accessibility Checker** pane:
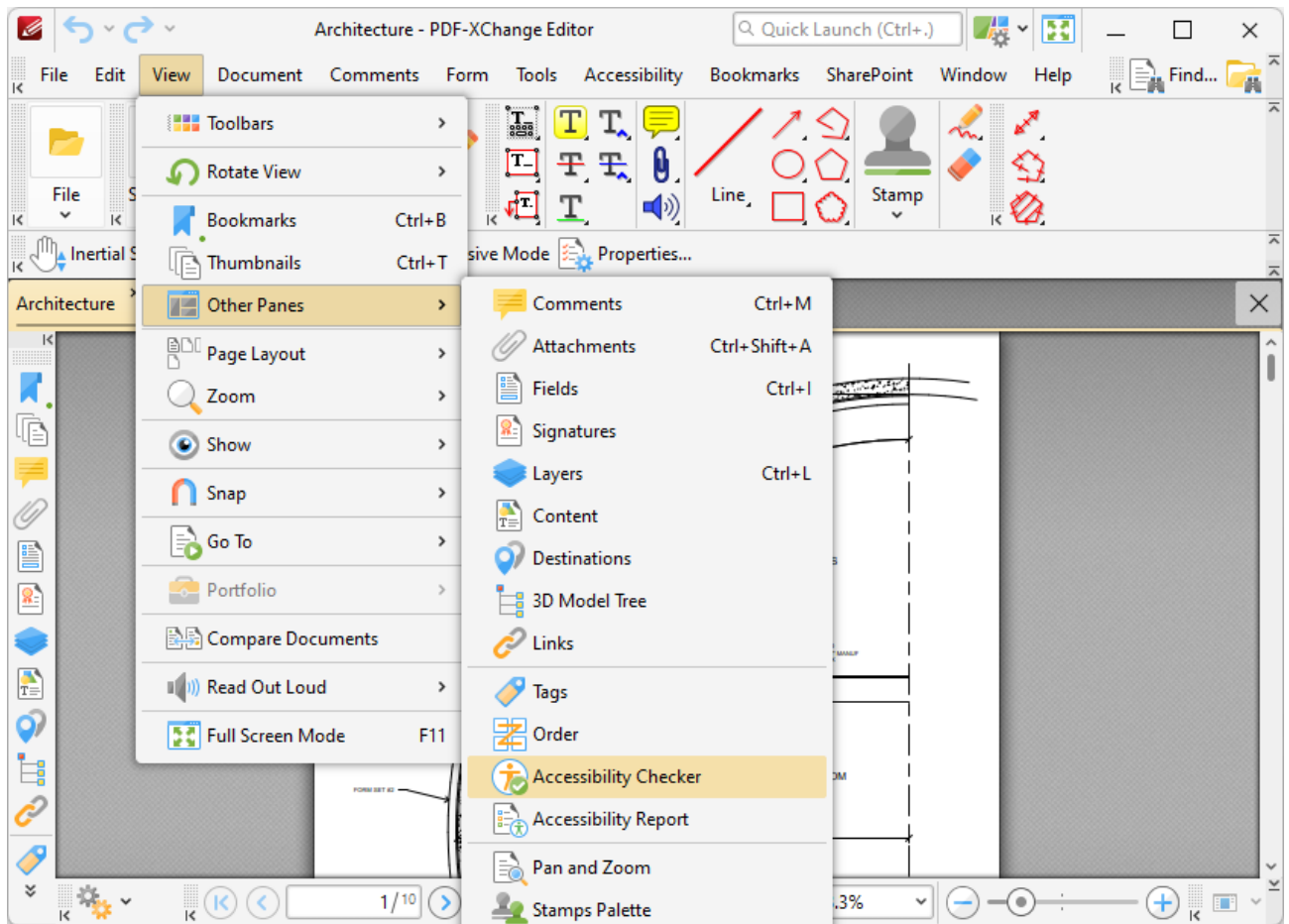
Figure 1. View Tab Submenu, Other Panes, Accessibility Checker

The **Accessibility Checker** pane displays the results of accessibility checks:
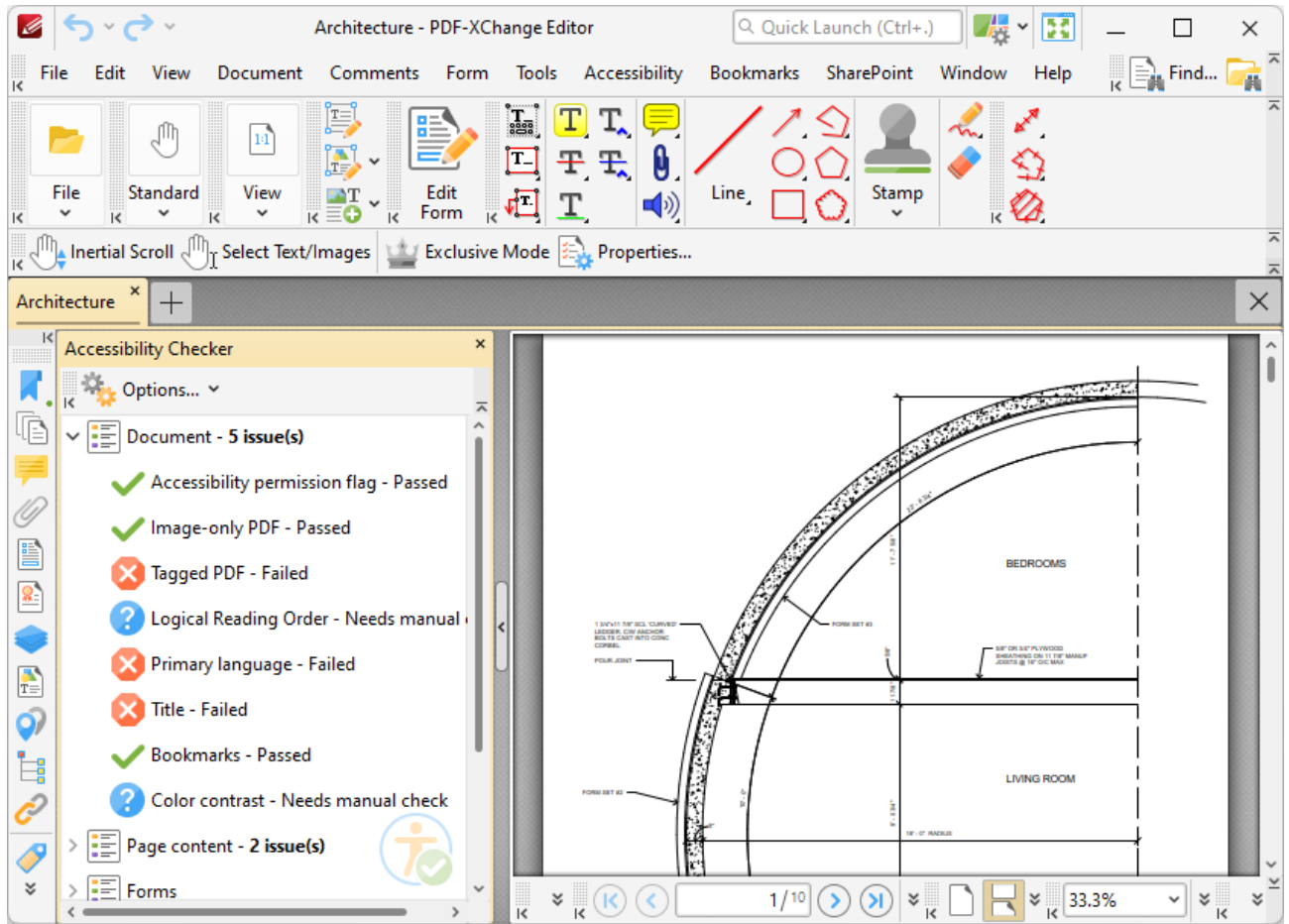
Figure 2. Accessibility Checker Pane

PDF-XChange Editor checks thirty-two rules when documents are checked for accessibility, and documents must pass all rules in order to meet accessibility standards. The results of checking these rules are detailed in the **Accessibility Checker** pane. Right-click failed rules to view options on the action to take for the rule:
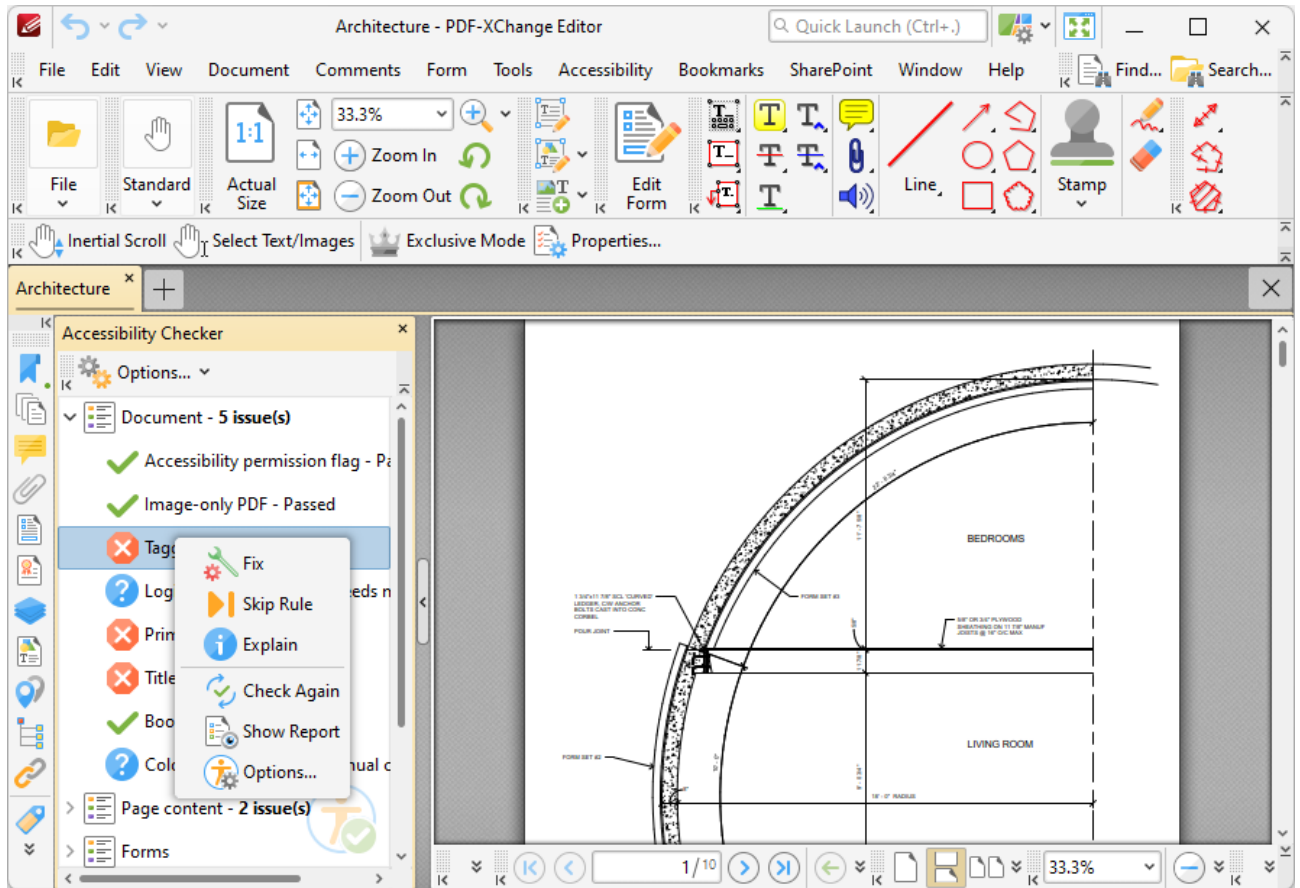
Figure 3. Accessibility Checker Pane, Right-Click Options for Failed Rules

- Click **Fix** to fix the document in order to pass the rule. Note that some rules require a manual fix.
- Click **Skip Rule** to omit the rule from the accessibility check.
- Click **Explain** to view an explanation of the rule.
- Click **Check Again** to check the rule again. You can use this option to save time instead of running a full accessibility check after you have performed manual repairs on the document.
- Click **Show Report** to open the **Accessibility Report** 582 pane and view the accessibility report for the current document.
- Click **Options** to determine options for when the accessibility check runs, as detailed **here.** 1038

5.3.5.13 Accessibility Report

Accessibility Report

Click **Accessibility Report** to open the **Accessibility Report** pane:
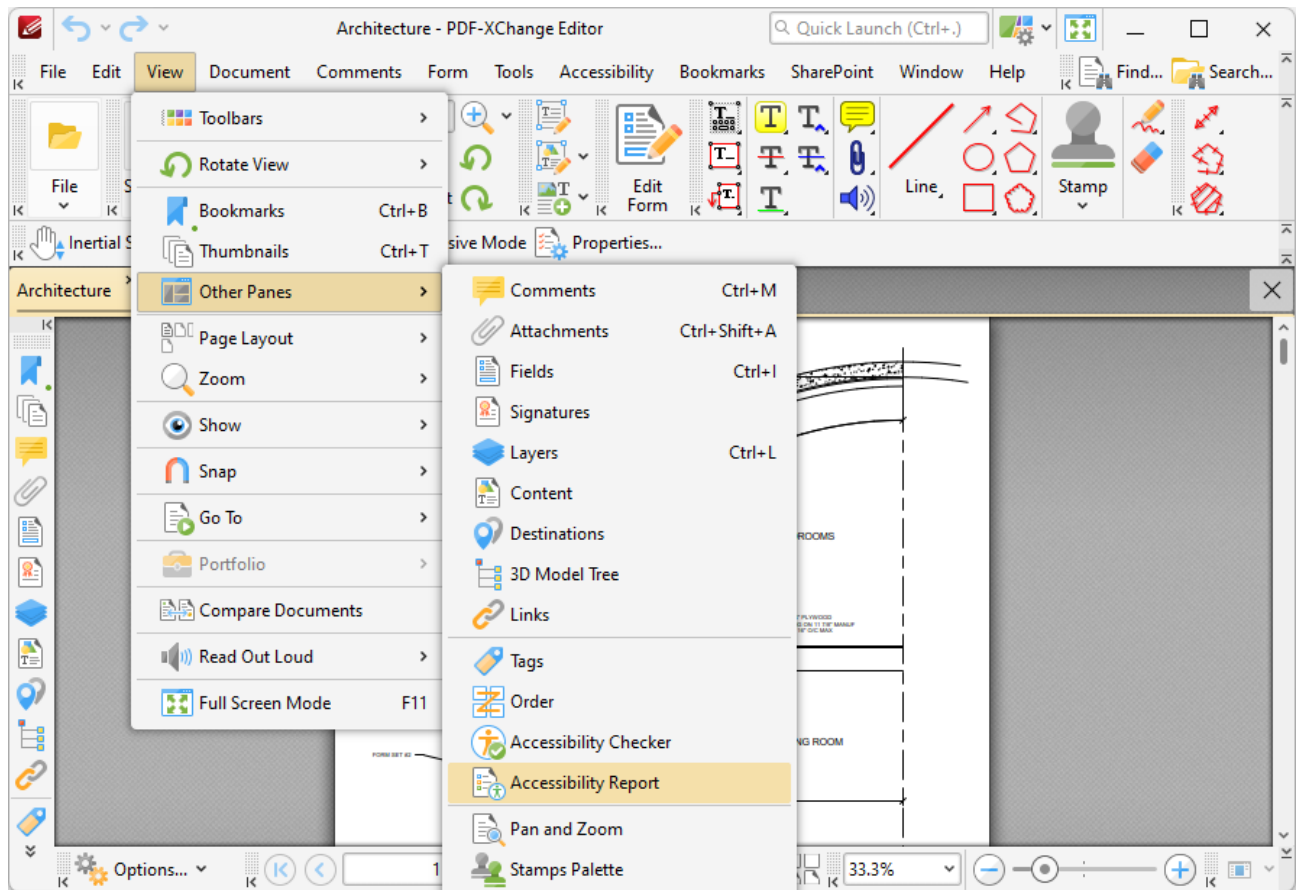
Figure 1. View Tab Submenu, Other Panes, Accessibility Report

The **Accessibility Report** pane displays a report after an accessibility check is performed:
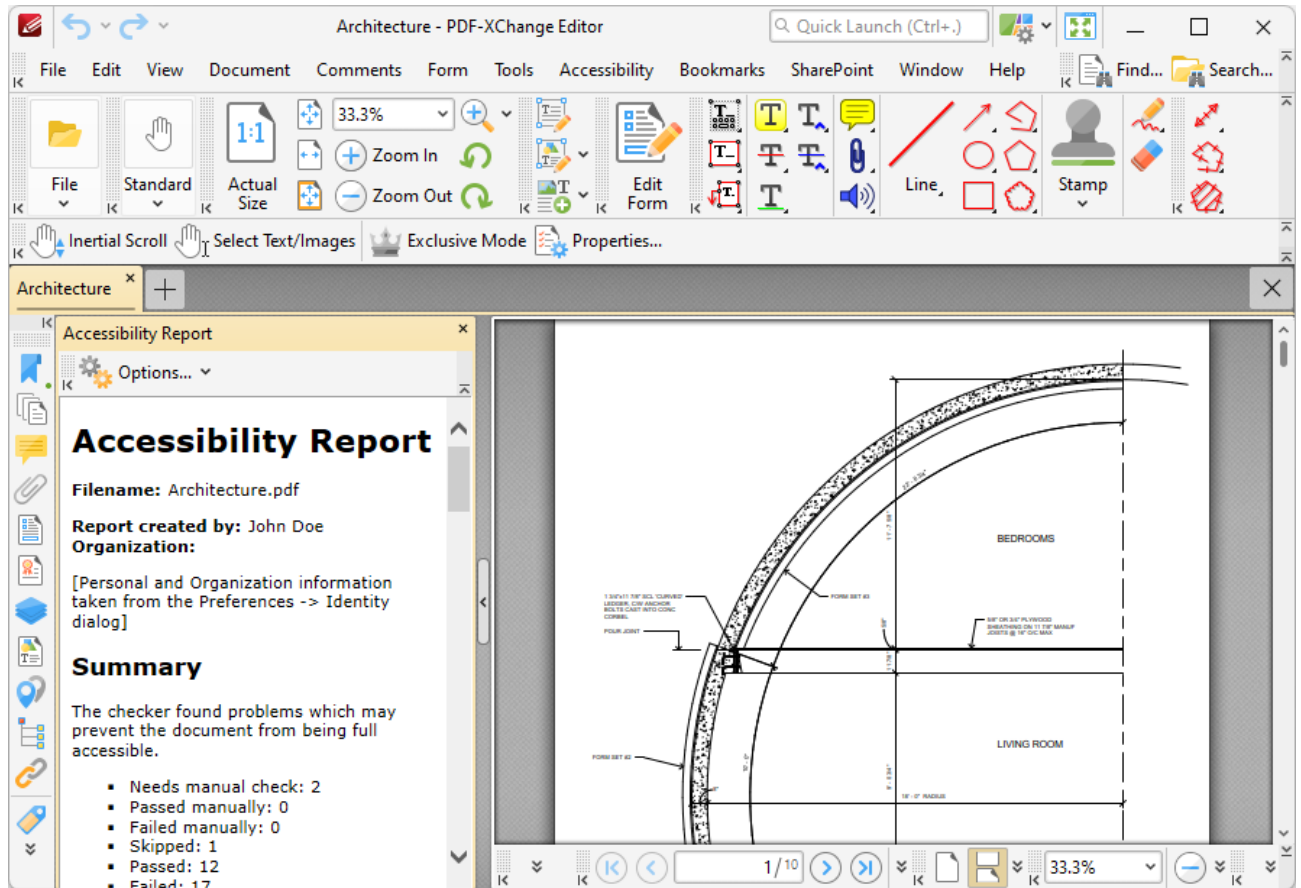
Figure 2. Accessibility Report Pane

This report details a summary of the results of the accessibility check. It also lists the current status of the document in relation to each rule in the accessibility check. Click rules to view further information. A complete breakdown of these rules is available **here.** 1102 You can use the **Accessibility Checker** pane to view further information about the results of each rule and fix any issues that are preventing the document from passing the accessibility check.

5.3.5.14 Pan and Zoom

Pan and Zoom

Click **Pan and Zoom** to open the **Pan and Zoom** pane:
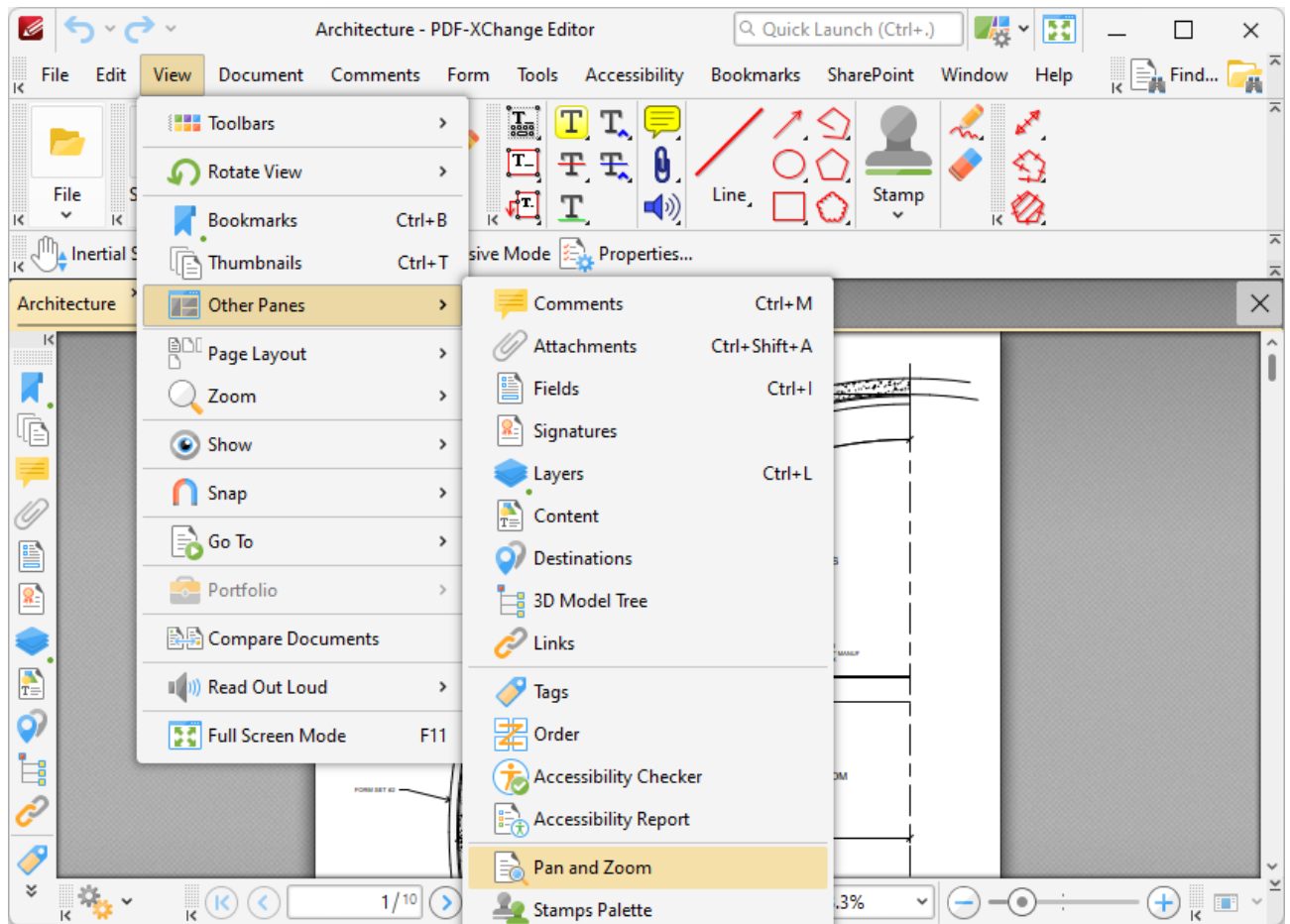
Figure 1. View Tab Submenu, Other Panes, Pan and Zoom

The **Pan and Zoom** pane displays a miniature version of the current page to assist in editing documents:

Figure 2. Active Pan and Zoom Pane

The blue rectangle in the **Pan and Zoom** pane determines the current view in the main window.

- Click and drag the rectangle to adjust the current view.
- Click and drag the yellow control points to manipulate the pan and zoom in the main window.
- Click and drag the **Pan and Zoom** pane to reposition it on the screen. When it is selected, four icons will appear in the center of the borders of the main window:

Figure 3. Pan and Zoom Pane Docking Options

Move the pointer to these icons and then release the mouse button to dock the **Pan and Zoom** pane. Use the icons in the **Pan and Zoom** pane to perform the following operations:

Use the [100%] zoom dropdown menu, or enter a value manually, to adjust the zoom level of the view in the pan and zoom pane.

Use the [+] [−] **Zoom in/Zoom Out** buttons to zoom in/out to predefined levels of zoom.

Use the [K] [>I] **First Page/Last Page** buttons to move to the first/last page of documents.

Use the [<] [>] **Previous Page/Next Page** buttons to move to the previous/next page of documents.

Use the [3/5] **Page** box to browse to document pages. Enter page numbers and press enter

Use the [camera] **Snapshot** icon to copy the current view to the clipboard. Further information about taking snapshots is available **here.** [305]

When the **Pan and Zoom** feature is in operation two options are available in the **Properties Toolbar:** ₄₈₅

- **Exclusive Mode** simplifies the process of using the **Pan and Zoom** feature. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to select areas without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Pan and Zoom** feature**.** See **here** ₁₂₉₂ for information on tool properties.

5.3.5.15 Stamps Palette

Stamps Palette

Click **Stamps Palette** to open the **Stamps Palette:**
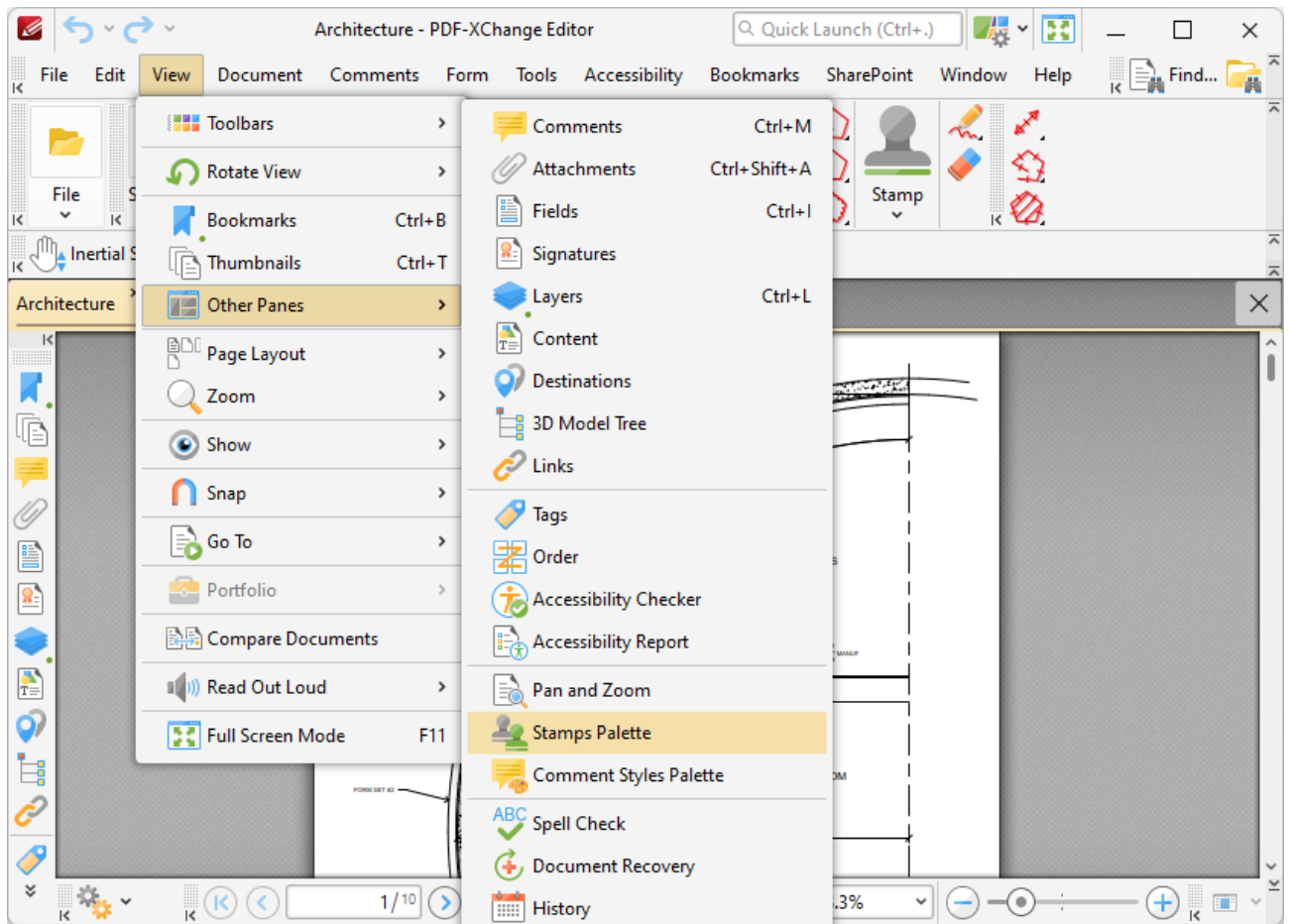
Figure 1. View Tab Submenu, Other Panes, Stamps Palette

The **Stamps Palette** contains all default and custom stamps:
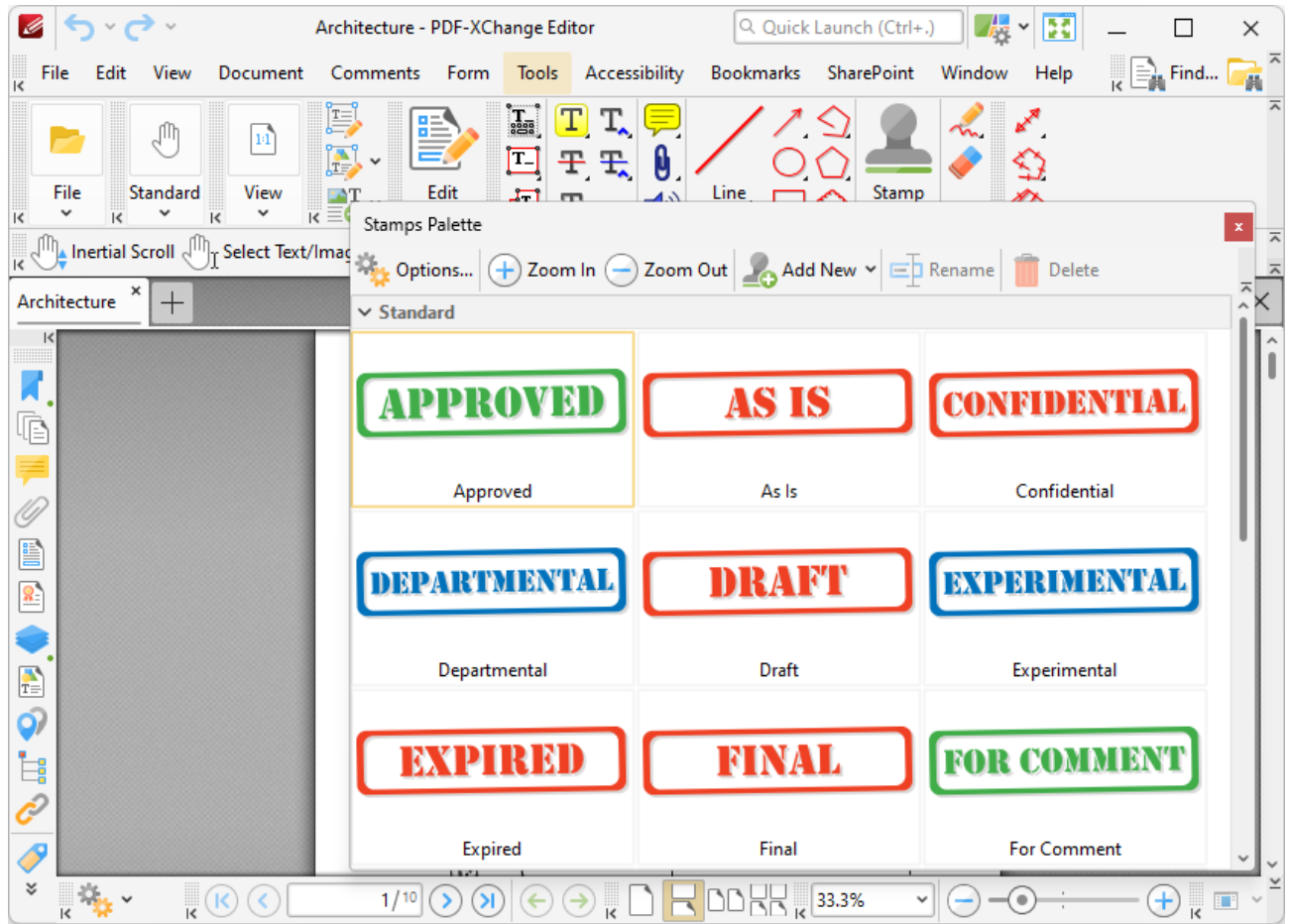
Figure 2. Stamps Palette

Stamps are used to give documents specific designations, as detailed in *(figure 2).* Click to select stamps, then click again to add them to documents. Use the icons in the **Stamps Palette** to perform the following operations:

Use the ⊕ ⊖ **Zoom in/Zoom Out** buttons to adjust the zoom level.

Click ⊟ **Rename** to rename selected stamps.

Click 🗑 **Delete** to delete selected stamps.

Click 🖼 **Add New** to view stamp creation options:
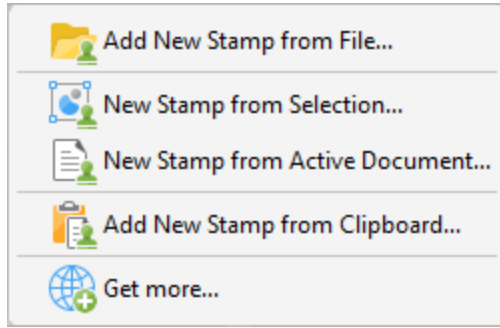
Figure 3. Stamp Creation Options

- Click **Add New Stamp from File** to create a stamp from an existing file.
- Click **New Stamp from Selection** to create a stamp from selected document content.
- Click **New Stamp from Active Document** to create a stamp from the active document.
- Click **Add New Stamp from Clipboard** to create a new stamp from the current clipboard content.
- Click **Get More** to view/download free stamps collections on the **PDF-XChange Co** website.
- Click and drag the **Stamps Palette** to reposition it in the user interface. When it is selected, four icons will appear in the center of the borders of the main window:
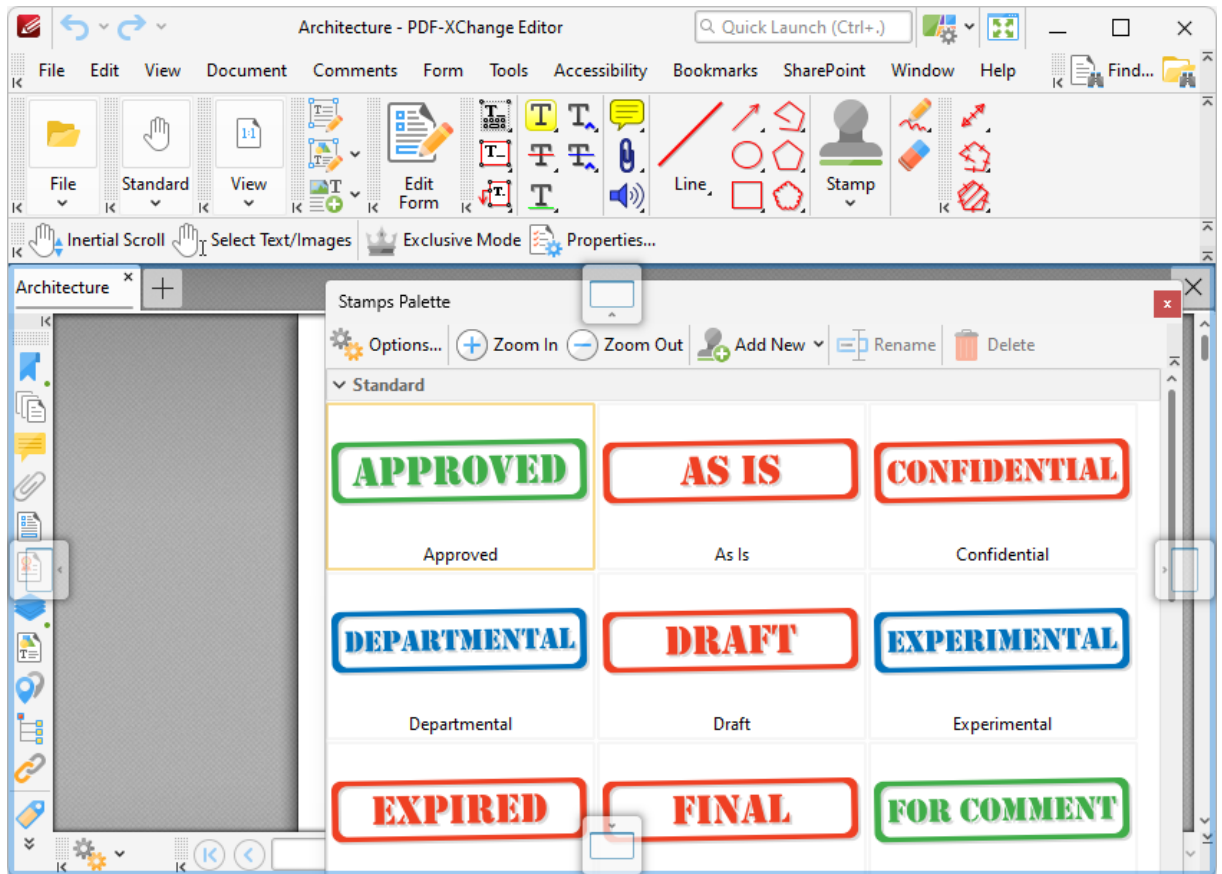
Figure 4. Stamps Palette Docking Options

Move the pointer to these icons and then release the mouse button to dock the **Stamps Palette.**

Further information about stamps and stamp creation is available **here.** 943

5.3.5.16   Comment Styles Palette

Comment Styles Palette

Click **Comment Styles Palette** to open the **Comment Styles Palette:**
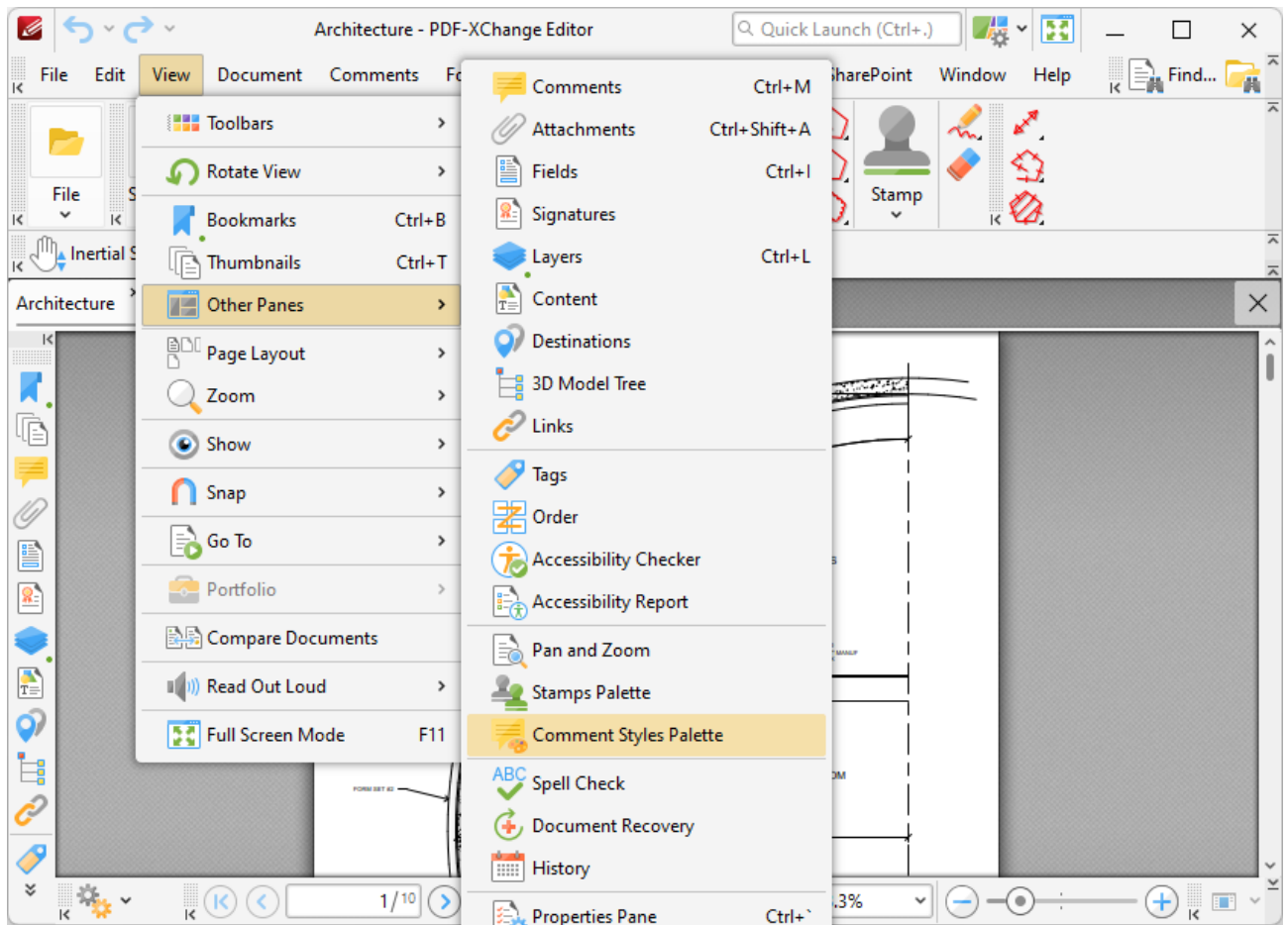
Figure 1. View Tab Submenu, Other Panes, Comment Styles Palette

The **Comment Styles Palette** contains all default and customized comment styles:
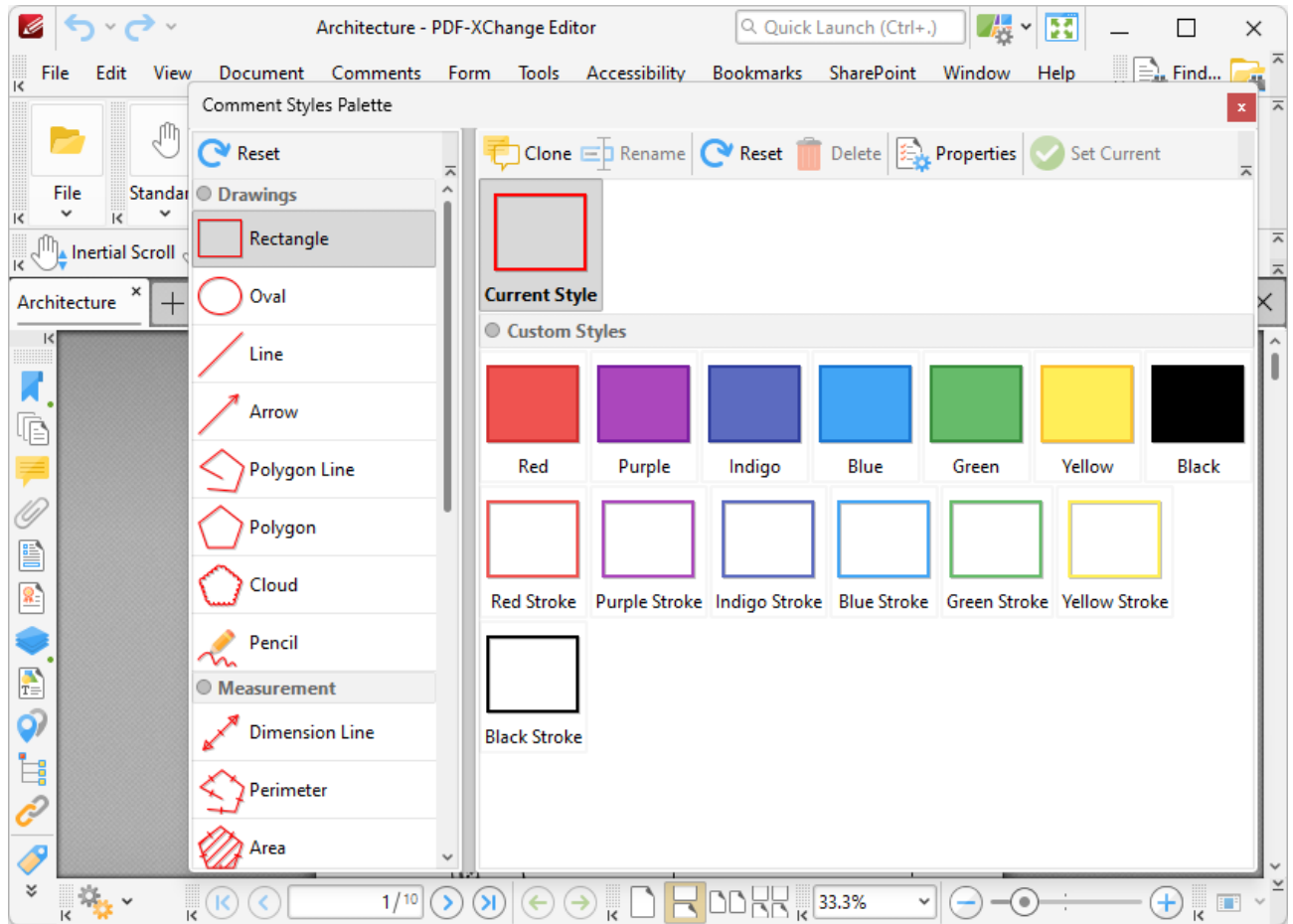
Figure 2. Comment Styles Palette

Comments are used to markup and annotate documents. The **Comment Styles Palette** facilitates the creation, saving and selection of custom comment styles. Select comment formats in the **Drawings** list and then click **Properties** to view/edit the properties of the comment style. All comment properties are detailed <u>here.</u> 1292 Double-click to enable comment styles for use in **PDF-XChange Editor.** Click and drag the **Comment Styles Palette** to reposition it on the screen. When it is selected, four icons will appear in the center of the borders of the main window:
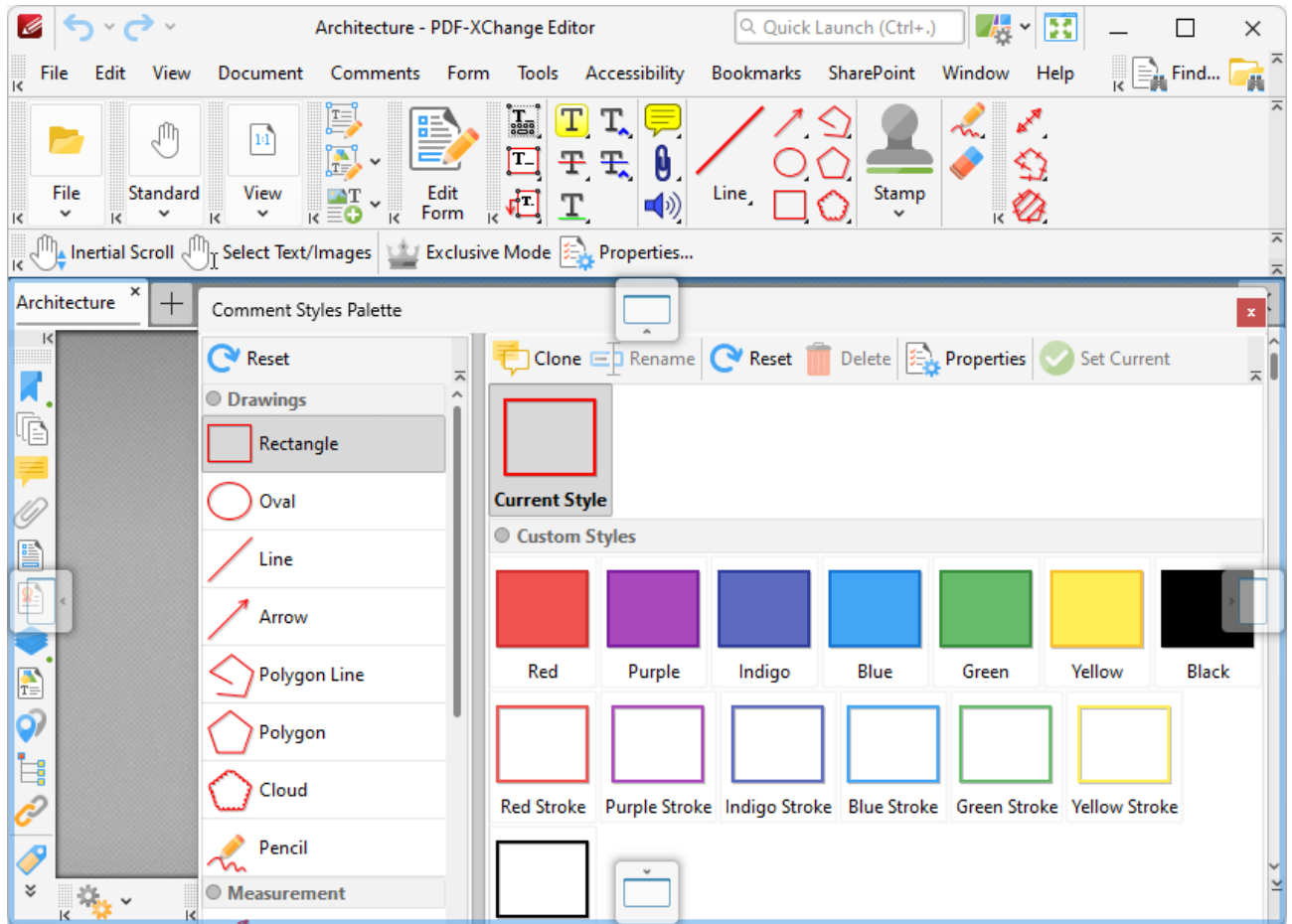
Figure 3. Comment Styles Palette Docking Options

Move the pointer to these icons and then release the mouse button to dock the **Comment Styles Palette** pane. Use the icons in the **Comment Styles Palette** to perform the following operations:

Click the ↻ **Reset** icon above the **Drawings** list to reset all comment styles.

Click 🗨 **Clone** to clone the selected style. The feature creates a clone of an existing style, which is useful when it is desired to edit the properties of a style without losing the original customization.

Click ▦ **Rename** to rename selected comment styles.

Click the ↻ **Reset** icon in the center pane to reset selected comment styles.

Click 🗑 **Delete** to delete selected comment styles. Please note that it is not possible to delete the default comment styles.

Click 📝 **Properties** to view/edit the properties of selected comment styles, as detailed above.

Click ✅ **Set Current** to set the selected comment style as the current style for the selected comment format.

5.3.5.17 Spell Check Pane

Spell Check Pane

Click **Spell Check** to open the **Spell Check** pane:
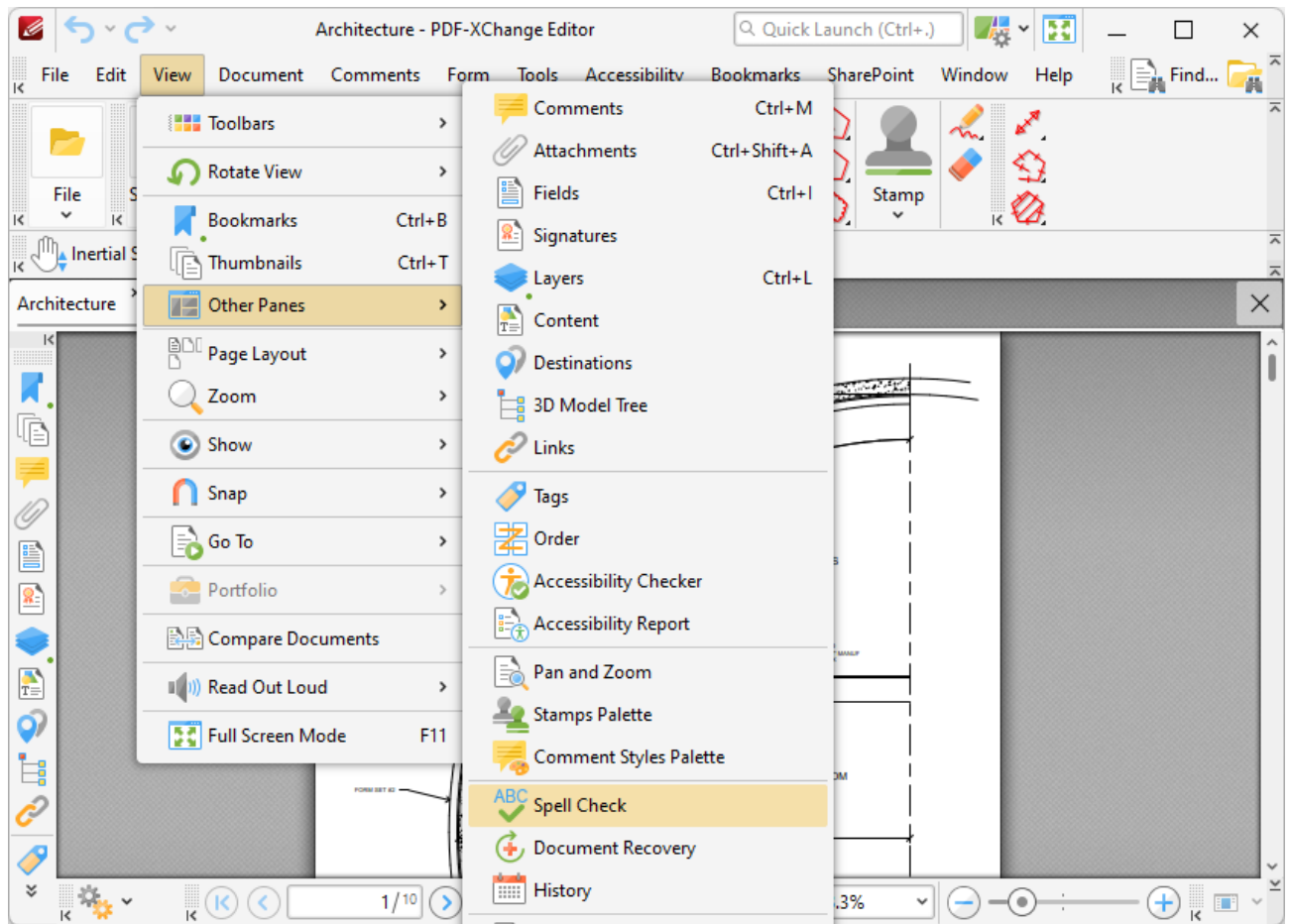
Figure 1. View Tab Submenu, Other Panes, Spell Check

The **Spell Check** pane is used to perform spell checks on documents:
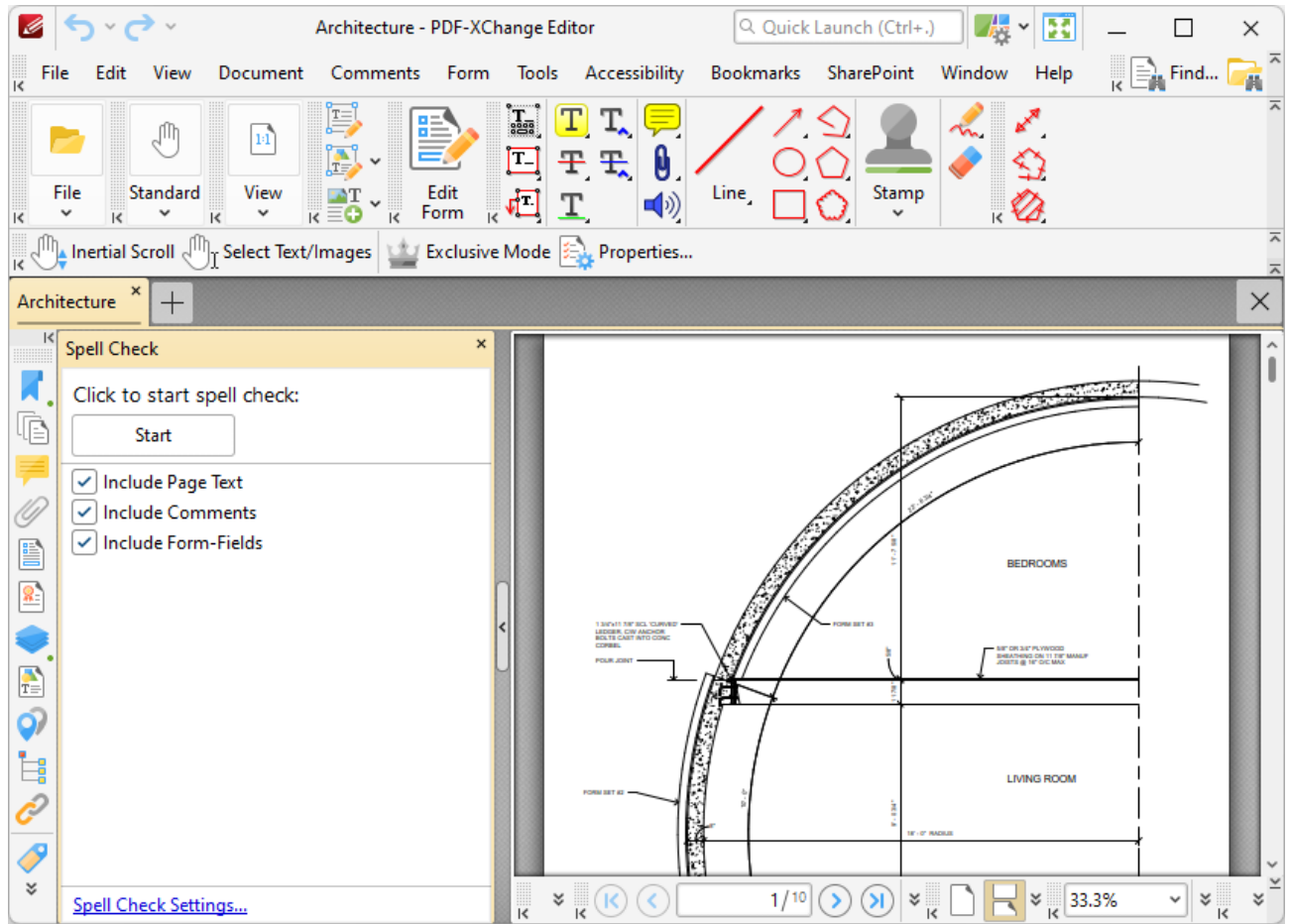
Figure 2. Spell Check Pane

Click **Start** to initiate spell checks. Further information on the **Spell Check** feature and its associated settings are available **here.** 766

5.3.5.18 Document Recovery Pane

Document Recovery Pane

Click **Document Recovery** to open the **Document Recovery** pane:
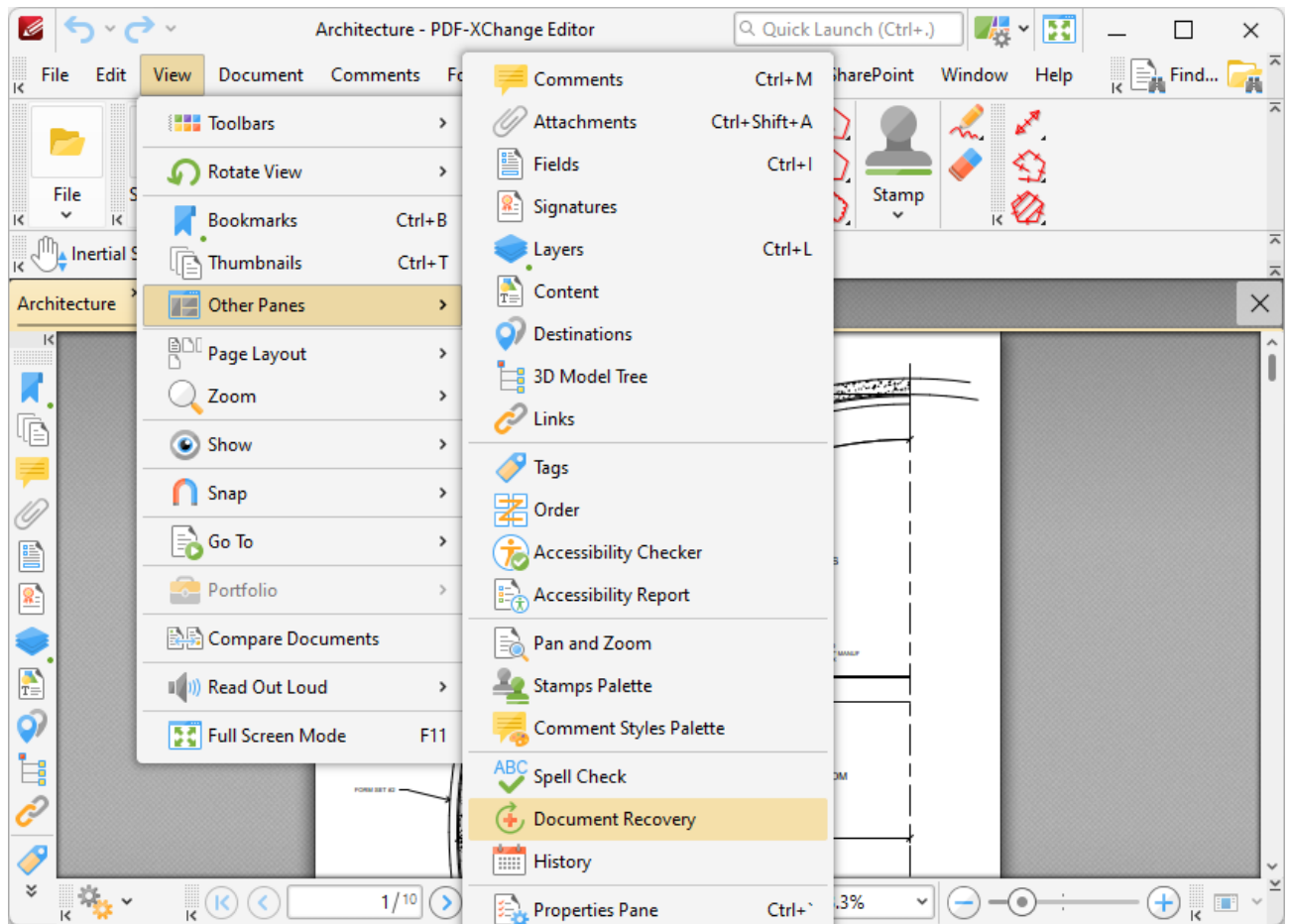
Figure 1. View Tab Submenu, Other Panes, Document Recovery

The **Document Recovery** pane details documents recovered when **PDF-XChange Editor** is closed and unsaved changes are present:
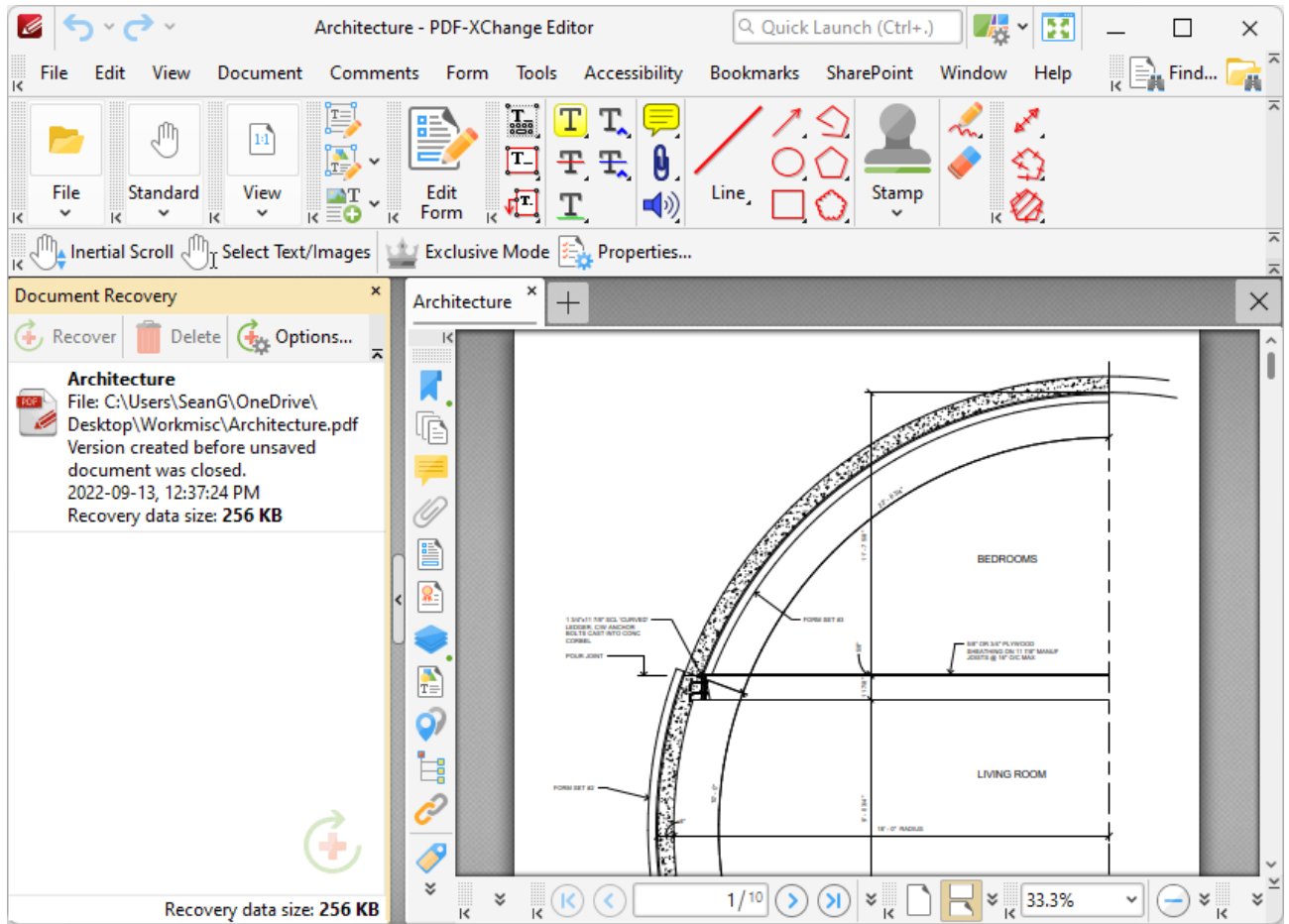
Figure 2. Document Recovery Pane

Recovered documents are detailed in the pane. Use the icons in the **Recovery** pane to perform the following operations:

Click ![Recover icon] **Recover** to recover selected documents. Recovered documents will be displayed in the main window.

Click ![Delete icon] **Delete** to delete selected recovered documents.

Click ![Options icon] **Options** to view/determine recovery options. The **Documents** preferences will open. These preferences are detailed **here.** [231]

5.3.5.19 History

Links

Click **History** to open the **History** pane:
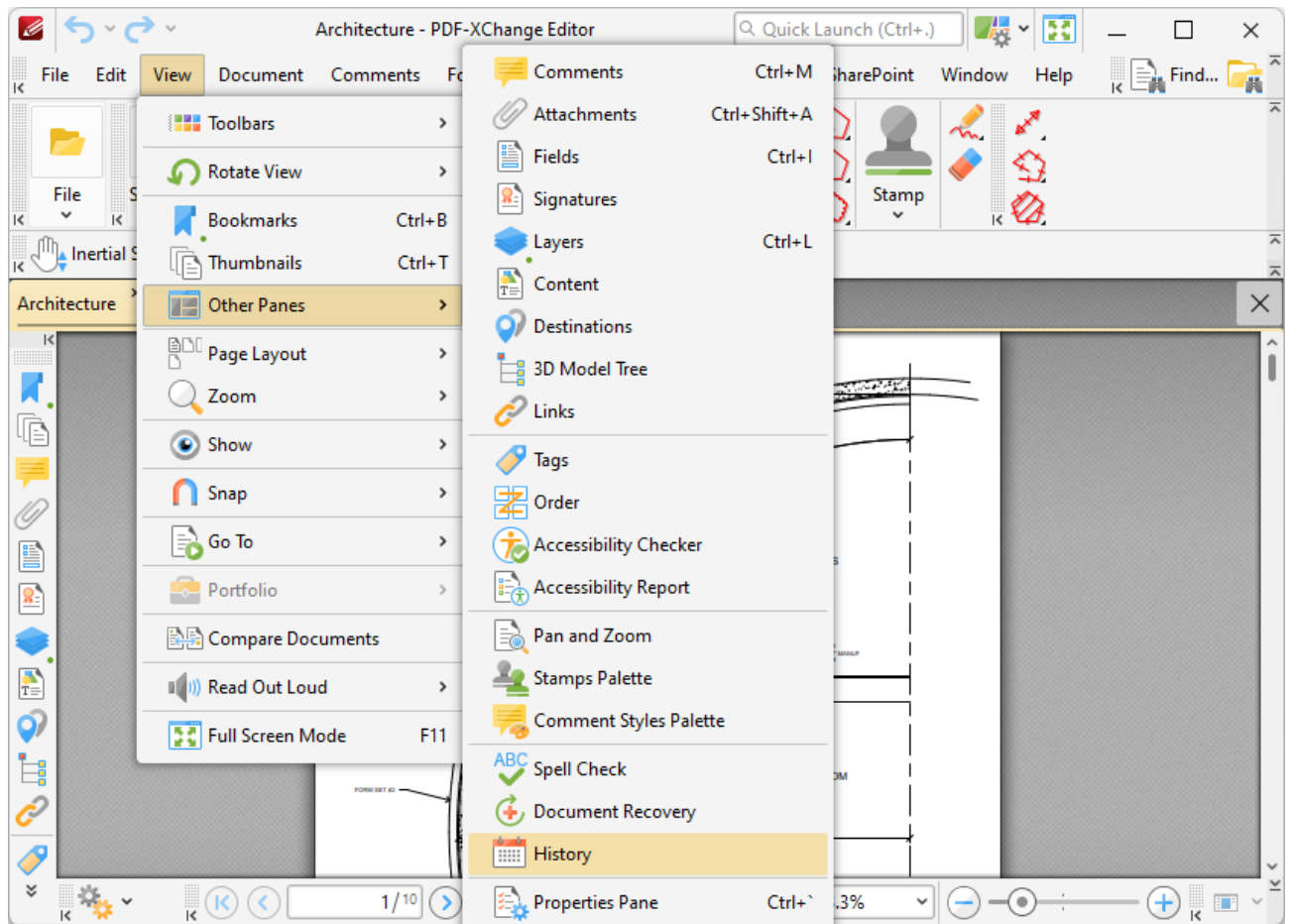
Figure 1. View Tab Submenu, Other Panes, History

The **History** pane details the history of documents opened in **PDF-XChange Editor:**
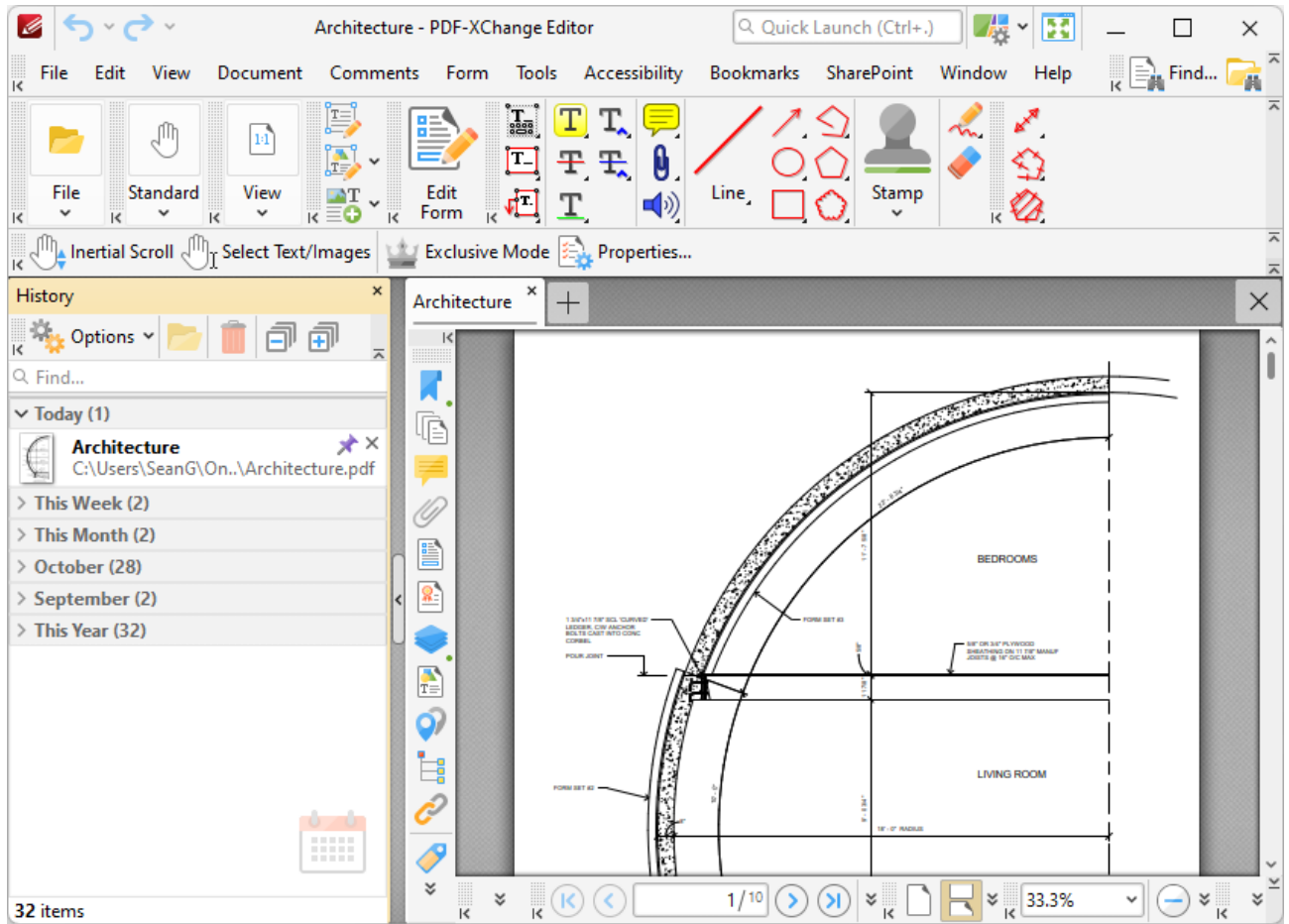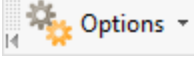
Figure 2. History Pane

The history of opened documents is detailed in the pane. Click the dropdown menus to view documents opened in the last hour/yesterday/last week/last month, and double-click to open documents. Use the **Find** search box to search for/open documents. Use the icons in the pane to perform the following operations:

Click   **Open** to open selected documents.

Click   **Remove** to remove selected documents from the pane.

Click   **Collapse** to collapse all groups in the pane.

Click   **Expand** to expand all groups in the pane.

Click   **Options** for additional options:
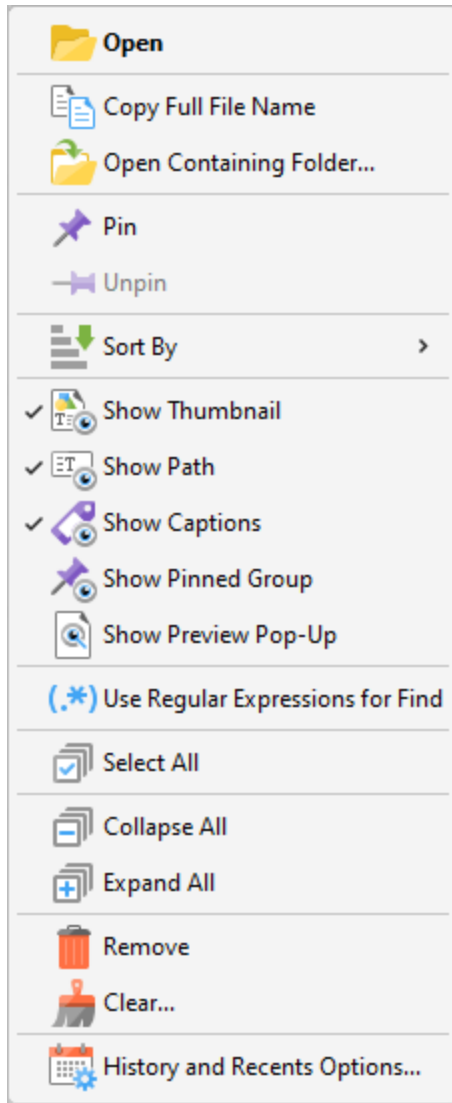
Figure 3. History Options

- Click **Open** to open selected documents.
- Click **Copy Full File Name** to copy the full name of selected documents to the clipboard.
- Click **Open Containing Folder** to open the containing folder of selected documents.
- Click **Pin/Unpin** to pin/unpin selected documents. Pinned documents remain at the top of the **Recent Files** | 88 | list, which makes them easier to locate and open. You can use the **Show Pinned Group** option detailed below to show/hide pinned documents in the **History** pane.
- Hover over **Sort by** to determine how files in the **History** pane are sorted, then select **Opened time, Modified time, Closed time** or **Alphabetical** as desired. Click **Show Groups** to show/hide groups in the **History** pane.
- Click **Show Thumbnail** to show/hide document thumbnails in the **History** pane.
- Click **Show Path** to show/hide document paths in the **History** pane.
- Click **Show Captions** to show/hide document names in the **History** pane.
- Click **Show Pinned Group** to show/hide the pinned documents in the **History** pane.

- Click **Show Preview Pop-Up** to enable/disable the display of document preview pop-ups when the pointer is hovered over documents in the **History** pane.
- Click **Use Regular Expressions for Find** to enable the use of **ECMAScript** syntax-based regular expressions in the **Find** search box of the **History** pane.
- Click **Select All** to select all documents in the **History** pane.
- Click **Collapse All/Expand All** to collapse/expand all groups of documents in the **History** pane.
- Click **Remove** to remove selected documents from the **History** pane.
- Click **Clear** to remove specified documents from the **History** pane.
- Click **History and Recents Options** to manage options for the document history and recent documents. The **Manage History and Recents** dialog box will open, as detailed **here.** 88

5.3.5.20 Properties Pane

Properties Pane

Click **Properties Pane** (or press Ctrl+') to open the **Properties** pane:
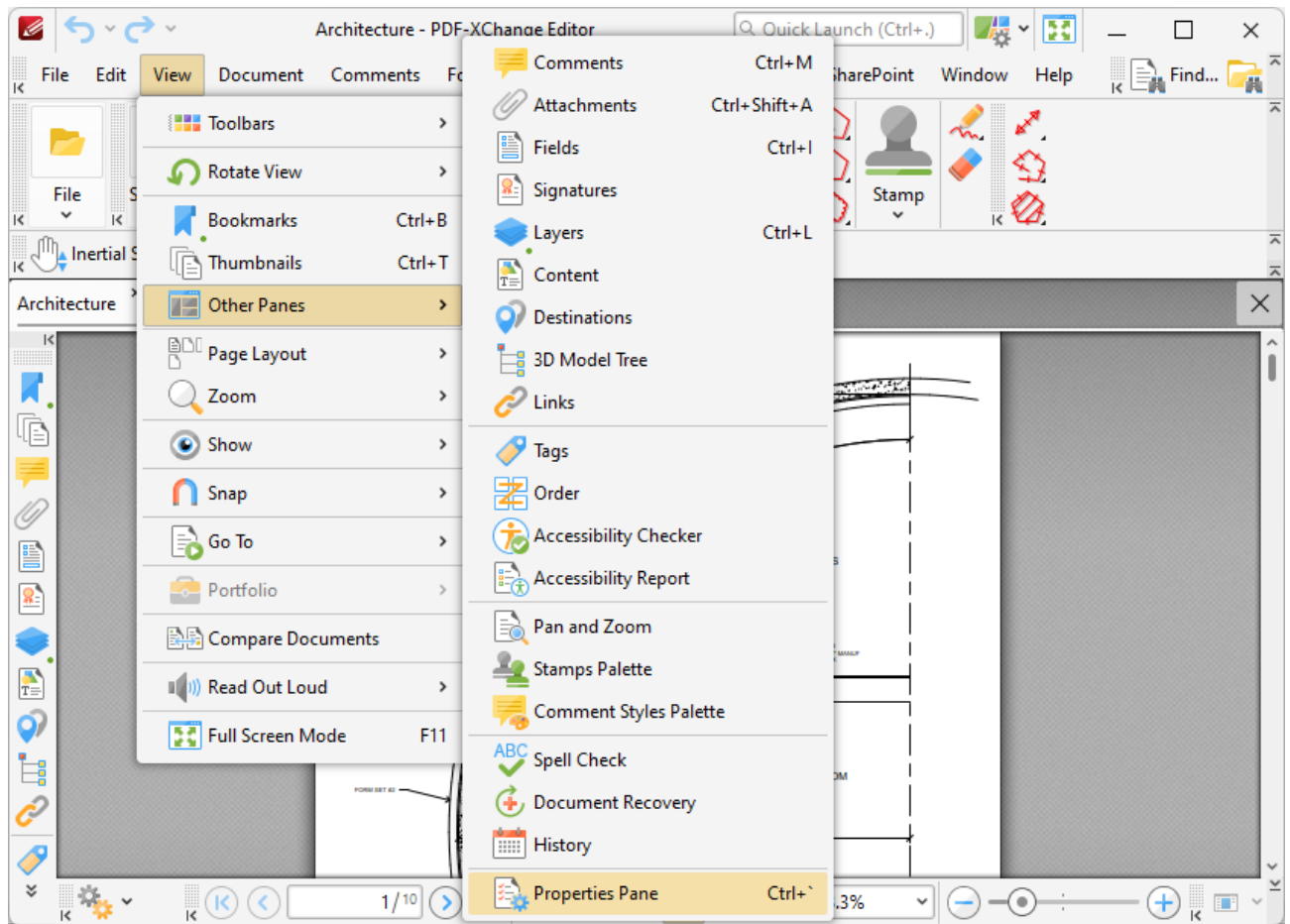
Figure 1. Edit Tab Submenu, Properties

This pane displays the properties of selected document content:
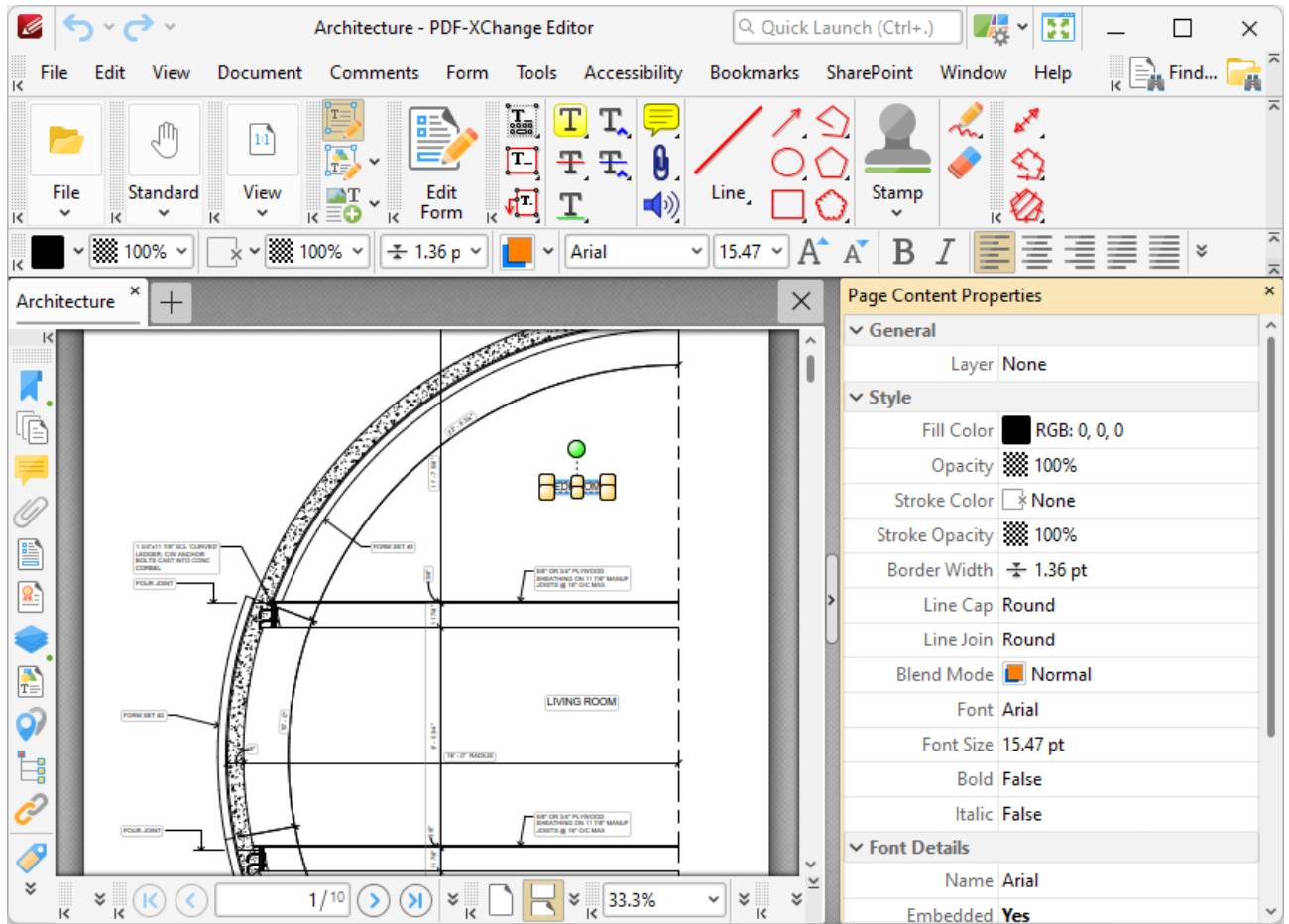
Figure 2. Properties Pane

Click properties in the **Properties** pane to edit them as desired. (Please note that not all properties can be edited). Definitions of tool and comment properties are detailed **here.** [1292]

5.3.6   Page Layout

Page Layout

Hover over **Page Layout** to view document layout options:
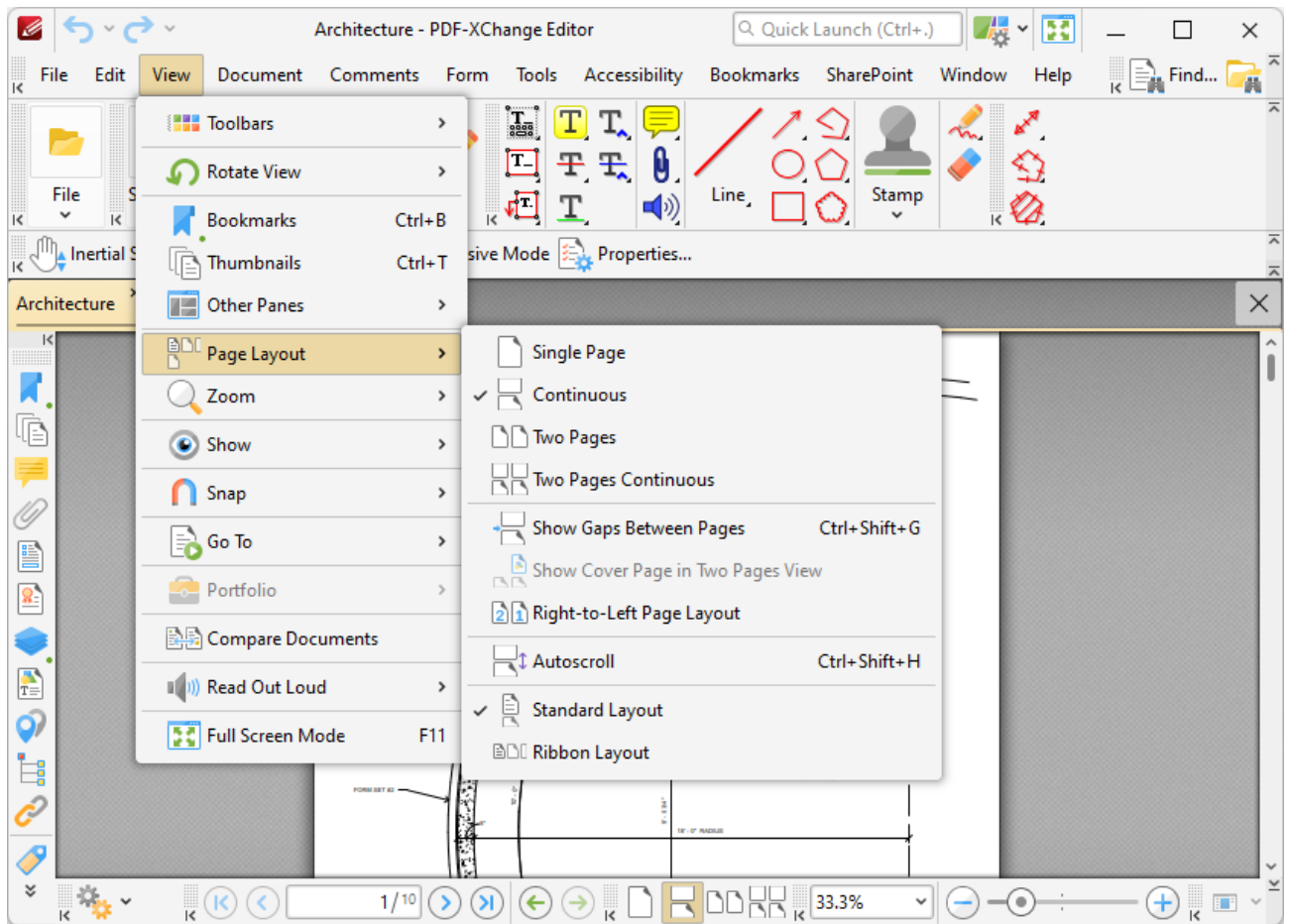
Figure 1. View Tab Submenu, Page Layout Options

The **Page Layout** options determine the page display in **PDF-XChange Editor:**

- Select **Single Page** to display documents a single whole page at a time.
- Select **Continuous** to display documents as single pages continuously, which means consecutive pages can be viewed at the same time when scrolling.

- Select **Two Pages** to display documents two whole pages at a time. Pages are placed adjacently in the main window.
- Select **Two Pages Continuous** to display documents as two pages continuously, which means consecutive pairs of pages can be viewed at the same time when scrolling.
- 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 the two-page layout modes detailed above.
- Select **Right-to-Left Pages Layout** to view pages in right-to-left format when viewing documents in the two-page layouts detailed above.
- Select **Autoscroll** to activate the autoscroll feature. The keyboard shortcut to enable/disable autoscroll is Ctrl+Shift+H. Use the up and down arrows to adjust the autoscoll speed, and/or press the minus key to change the autoscroll direction.
- Select **Standard Layout** to view documents in standard layout, which means pages are ordered from top to bottom.
- Select **Ribbon Layout** to view document in ribbon layout, which means pages are ordered from left to right.

5.3.7   Zoom

Zoom

Hover over **Zoom** to view zoom options:
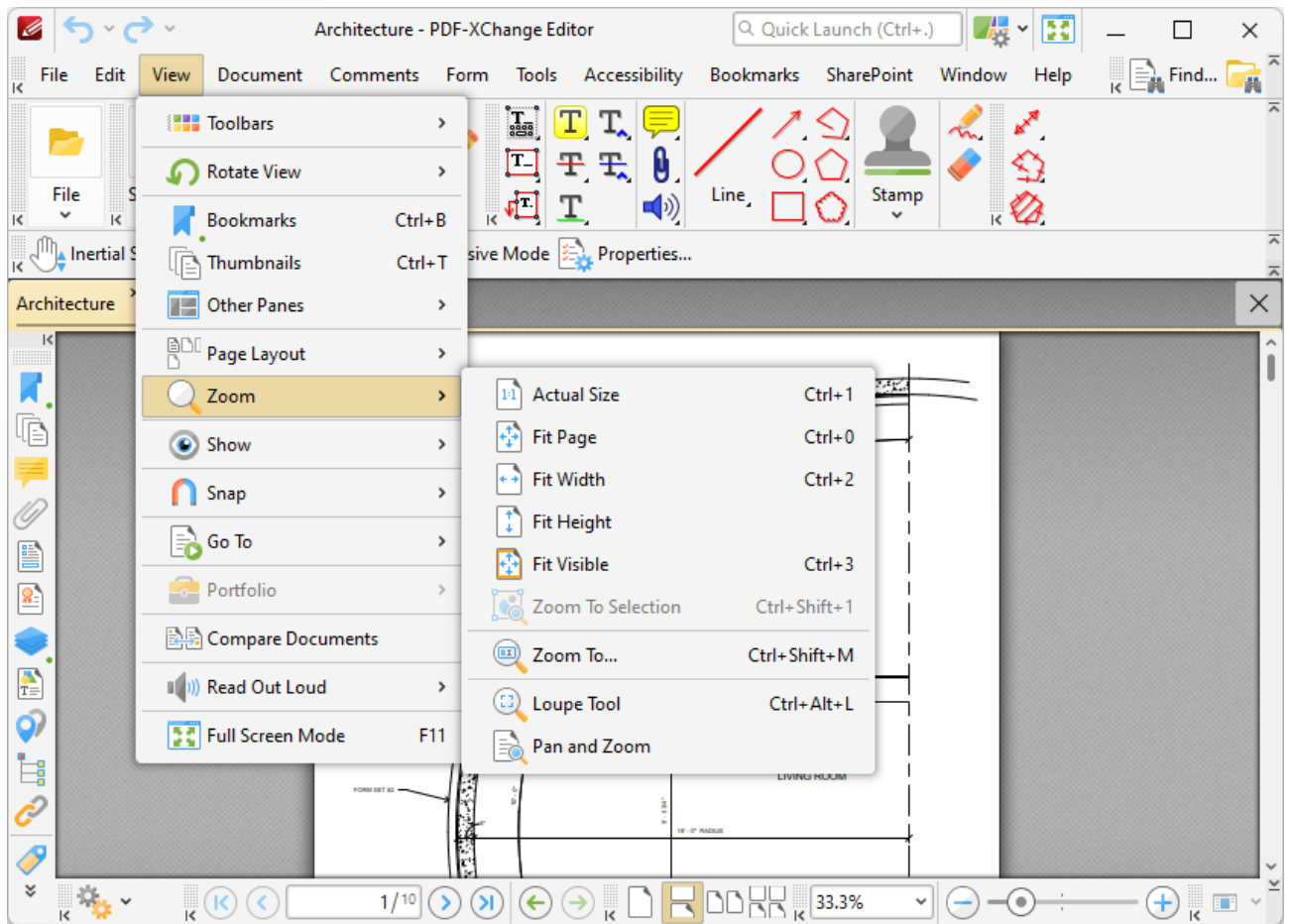
Figure 1. View Tab Submenu, Zoom Options

- Click **Actual Size** to view pages at their actual size.
- Click **Fit Page** to fit pages to the main window.
- Click **Fit Width** to fit the page width to the main window.
- Click **Fit Height** to fit the the page height to the main window.
- Click **Fit Visible** to fit visible page content (which excludes white margins) to the main window.

- Click **Zoom to Selection** to zoom to the content currently selected in the active document.
- Click **Zoom To** to specify a magnification level. The **Zoom To** dialog box will open. Select an option from the dropdown menu, or enter a value manually, then click **OK** to zoom.
- Click **Loupe Tool** to activate the **Loupe Tool,** which is detailed **here.** 817
- Click **Pan and Zoom** to activate the **Pan and Zoom** feature, which is detailed **here.** 820

5.3.8   Show

Show

Hover over **Show** to enable/disable additional features in the main window of **PDF-XChange Editor:**
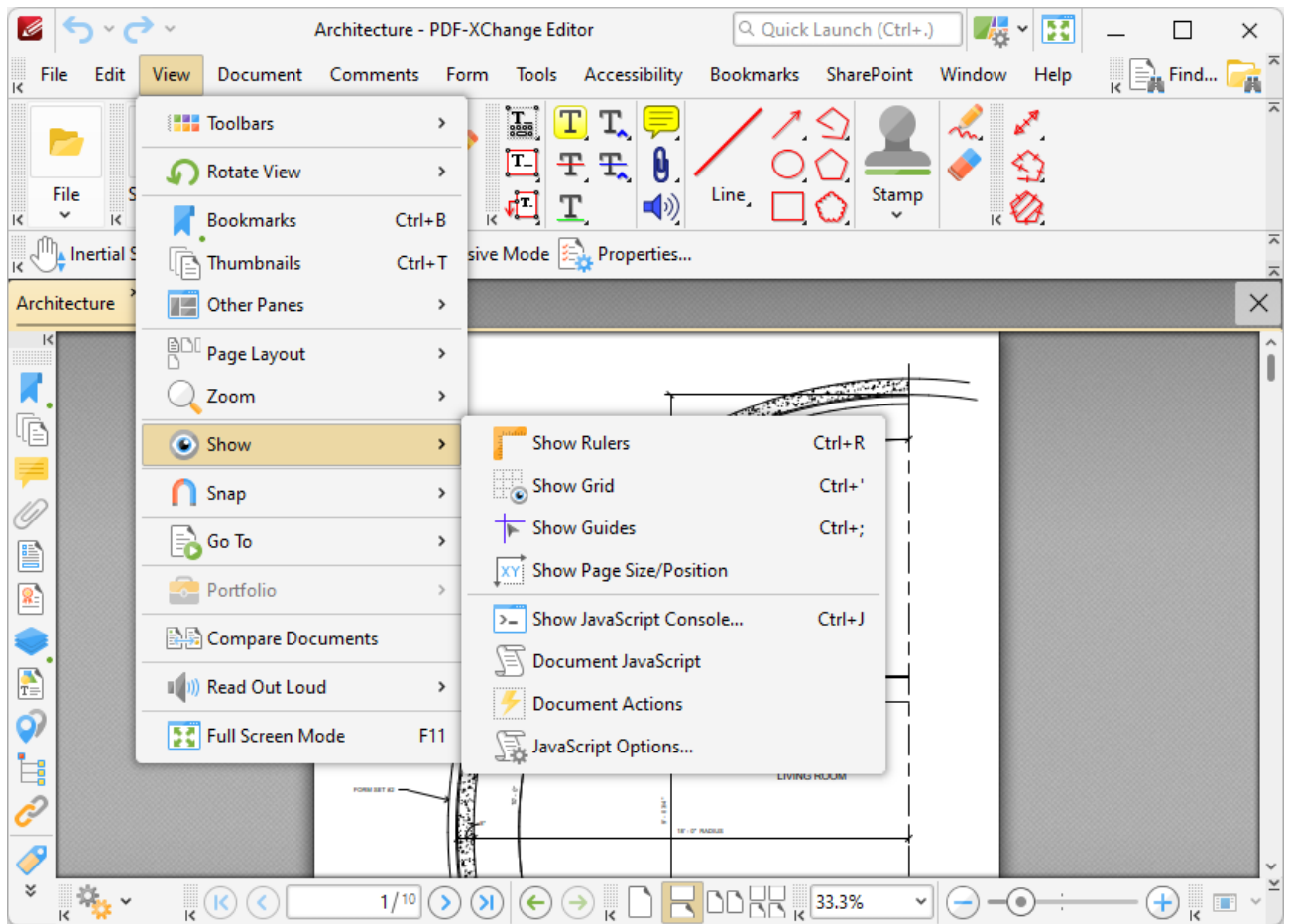
Figure 1. View Tab Submenu, Show Options

- Click **Show Rulers** to enable/disable rulers. Rulers display along the top and left side of the main window, and facilitate the convenient measurement of document elements. Rulers are enabled in **(figure 2).**
- Click **Show Grid** to enable/disable the **PDF-XChange Editor** grid. This grid is positioned on top of pages and assists in the accurate placement/alignment of text, objects and other document

content. It is especially useful when used in conjunction with the snapping feature, which is detailed **here.** [615] The grid is enabled in *(figure 2).*

- Click **Show Guides** to enable/disable guides, which are used in conjunction with rulers to simplify the process of aligning text and objects. Click and drag from rulers to launch guides. Guides are detailed in *(figure 2)*.
- Click **Show Page Size/Position** to enable/disable the display of the current page size and coordinates of the pointer location. This information is displayed in the **Document Options Toolbar,** [475] which is located on the lower left side of the main window.
- Click **Show JavaScript Console** to show/hide the **JavaScript Console**, which can be used to add/edit document JavaScript. The **JavaScript Console** is detailed in *(figure 5).*
- Click **Document JavaScript** to open the **Document JavaScript** section of the document properties, which details existing JavaScript in the current document, as detailed **here.** [197]
- Click **Document Actions** to open the **Actions** section of the document properties, which details existing JavaScript in the current document that executes on specific document operations, as detailed **here.** [196]
- Click **JavaScript Options** to open the **JavaScript** preferences and view/edit JavaScript preferences, as detailed **here.** [267]
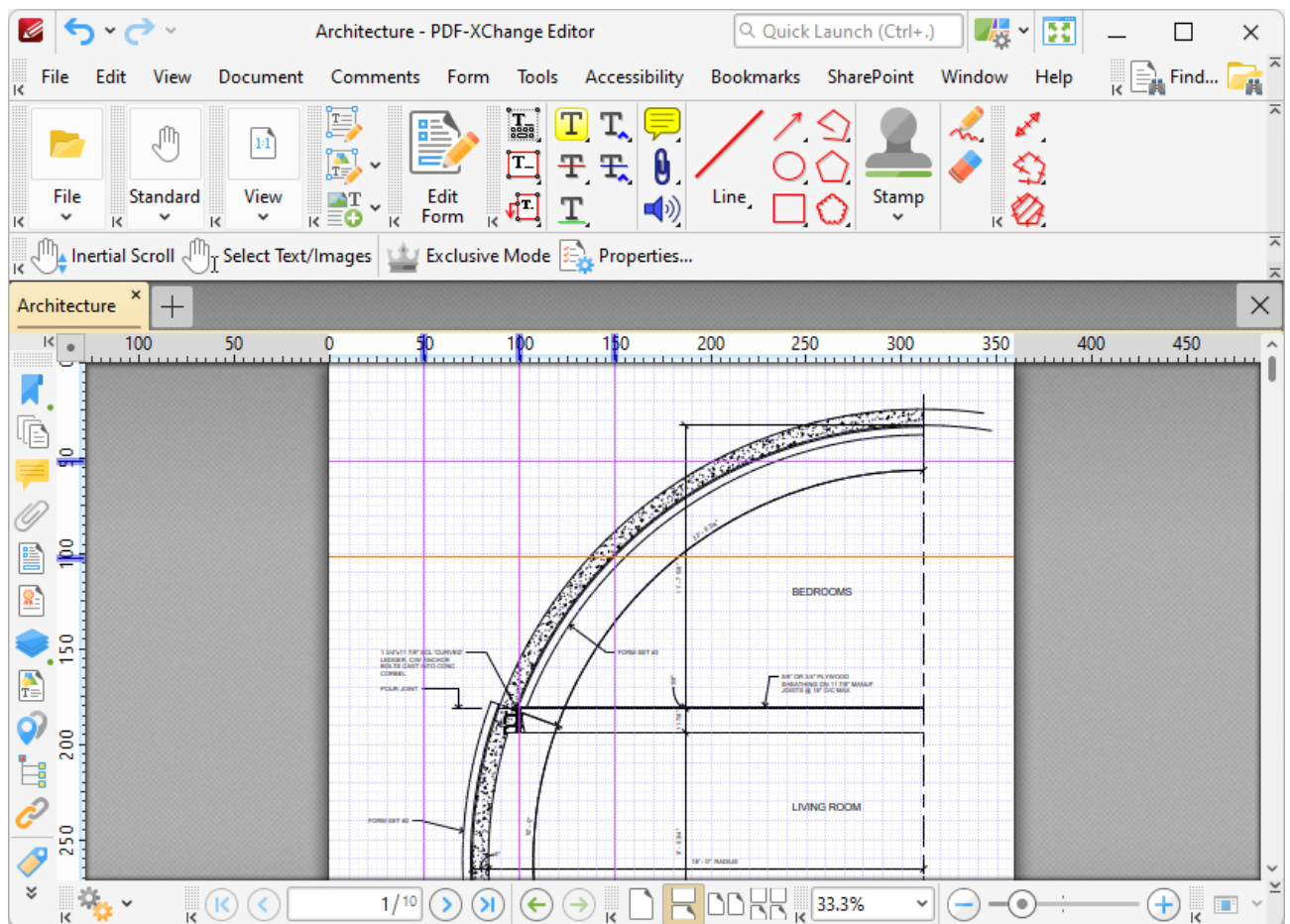
Figure 2. Show Options

Right-click rulers for additional options:
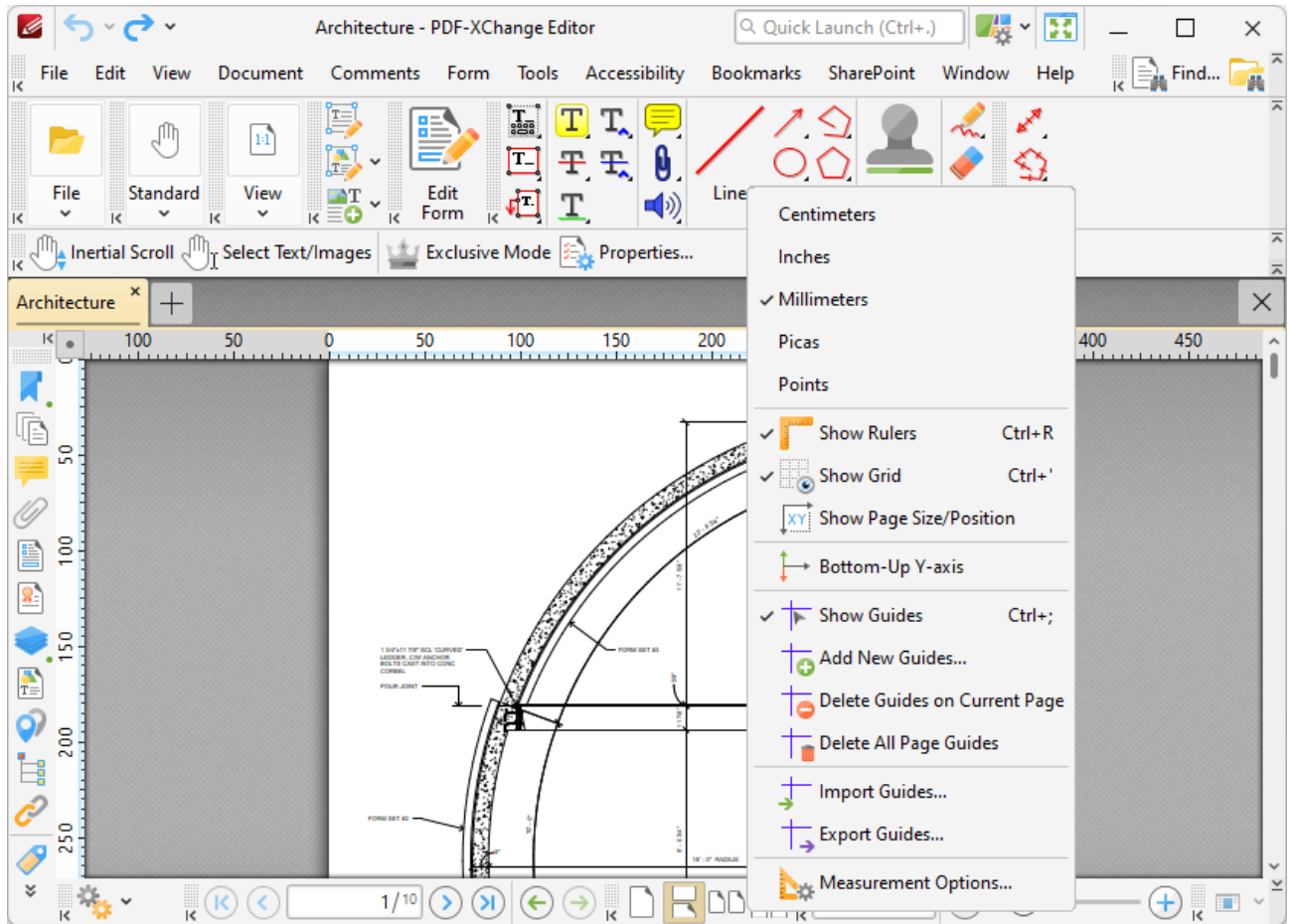
Figure 3. Rulers Right-Click Shortcut Menu

- Click **Centimeters, Inches, Millimeters, Picas** or **Points** to determine the units of measurement that rulers use.
- Click **Show Rulers** to show/hide rulers.
- Click **Show Grid** to show/hide the grid, as detailed below.
- Click **Show Page Size/Position** to show/hide the current page size and pointer location. These details are displayed in the **Document Options** toolbar, which is in the lower-left section of the user interface.
- Click **Bottom Up Y-axis** to enable/disable the displaying of units in the y-axis from the bottom of the UI.
- Click **Show Guides** to show/hide guides that have been created as detailed above.
- Click **Add New Guides** to add new guides to documents. This feature allows you to add guides to multiple pages of documents. When it is selected, the **Add Page Guides** dialog box will open, as detailed below.
- Click **Delete Guides on Current Page** to delete guides from the current page.
- Click **Delete All Page Guides** to delete all page guides from the current document.
- Click **Import Guides** to import guides into documents.

- Click **Export Guides** to export guides to file. Exported guides can be imported into documents using the **Import Guides** feature.
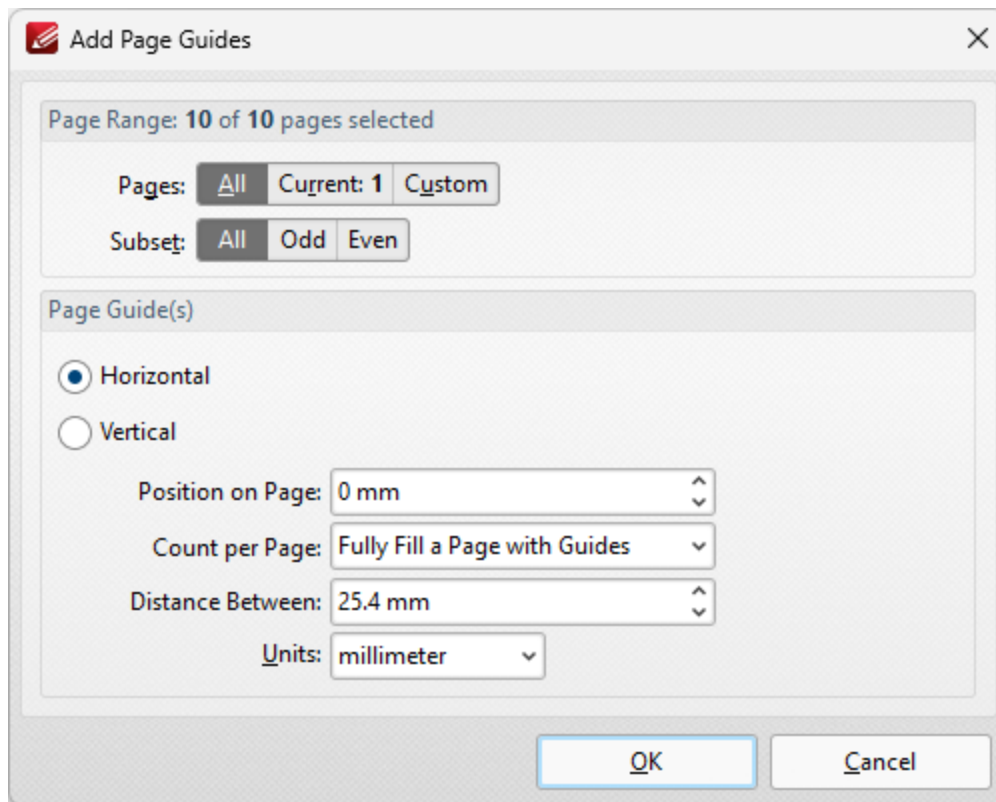
Figure 4. Add Page Guides Dialog Box

- Use the **Page Range** options to determine the pages to which new guides are added, as detailed **here.** ⧉ 1274
- Select **Horizontal** or **Vertical** to specify the type of guides you want to add to the document.
- Use the **Position on Page** dropdown menu to determine the position at which the guides are added.
- Use the **Count per Page** dropdown menu to determine how many guides are added to each page.
- Use the **Distance Between** dropdown menu to determine the distance between each guide.
- Use the **Units** dropdown menu to determine the units used in the **Distance Between** dropdown menu.

Click **OK** to add page guides to the document.
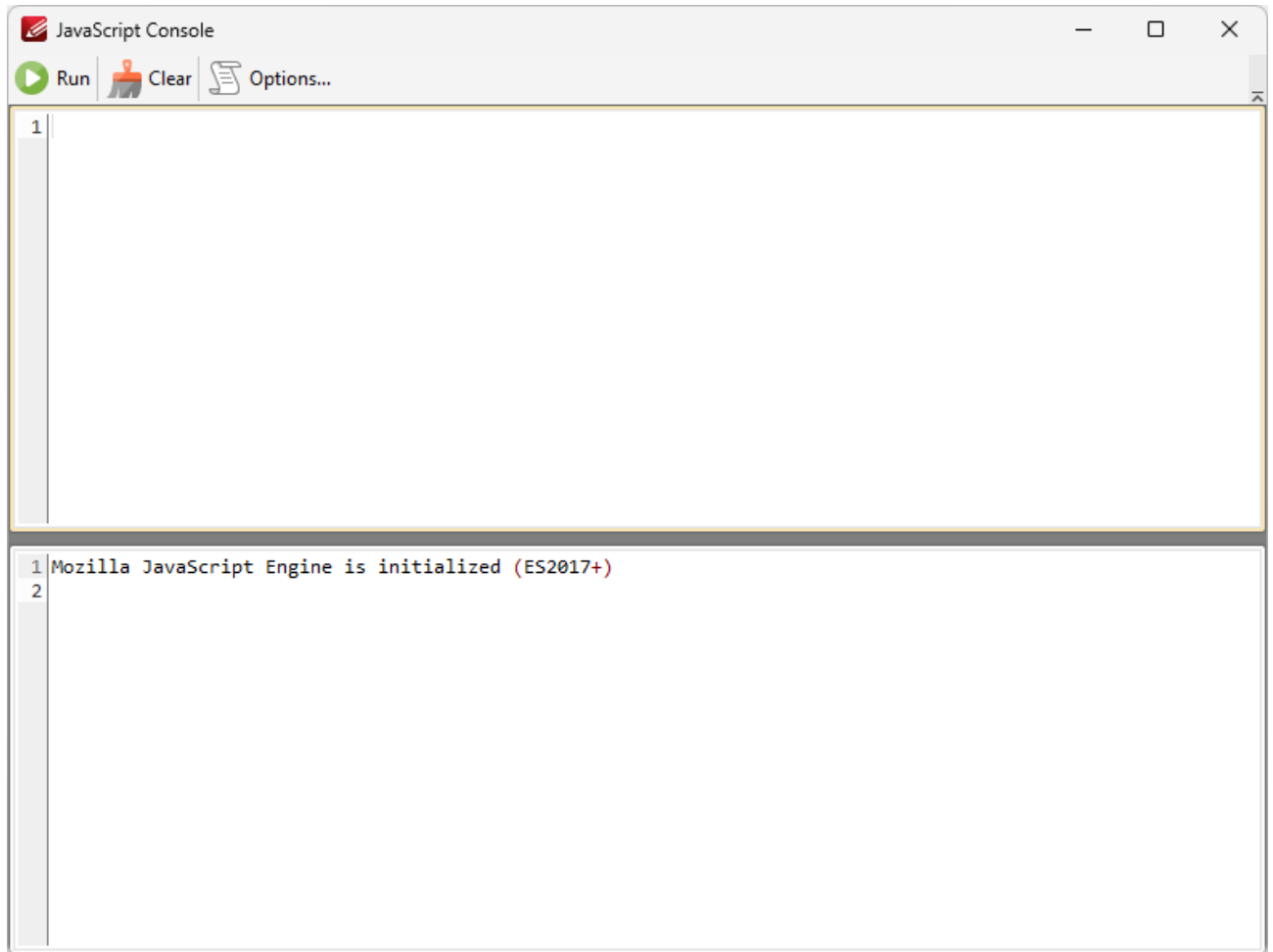
Figure 5. JavaScript Console

JavaScript is a high-level programming language that can be used to perform a range of operations. See **here** for an index of existing JavaScript operations that **PDF-XChange Editor** supports and additional information about JavaScript. https://help.pdf-xchange.com/pdfxe10c/customize-toolbars_ed.html?zoom_highlightsub=customize+toolbar

- Enter the desired JavaScript in the main window, then click **Run** (or press Ctrl+Enter) to run JavaScript. Errors in JavaScript will be displayed in the lower window.
- Click **Clear** to remove error messages from the lower window.
- Click **Options** to customize JavaScript preferences, as detailed **here.** [267]
- The keyboard shortcut to launch the JavaScript console is Ctrl+J.
- The **Add/Edit Link Tool** [989] can be used to create JavaScript-enabled links.

5.3.9 Snap

Snap

Hover over **Snap** to view the **PDF-XChange Editor** snapping options:
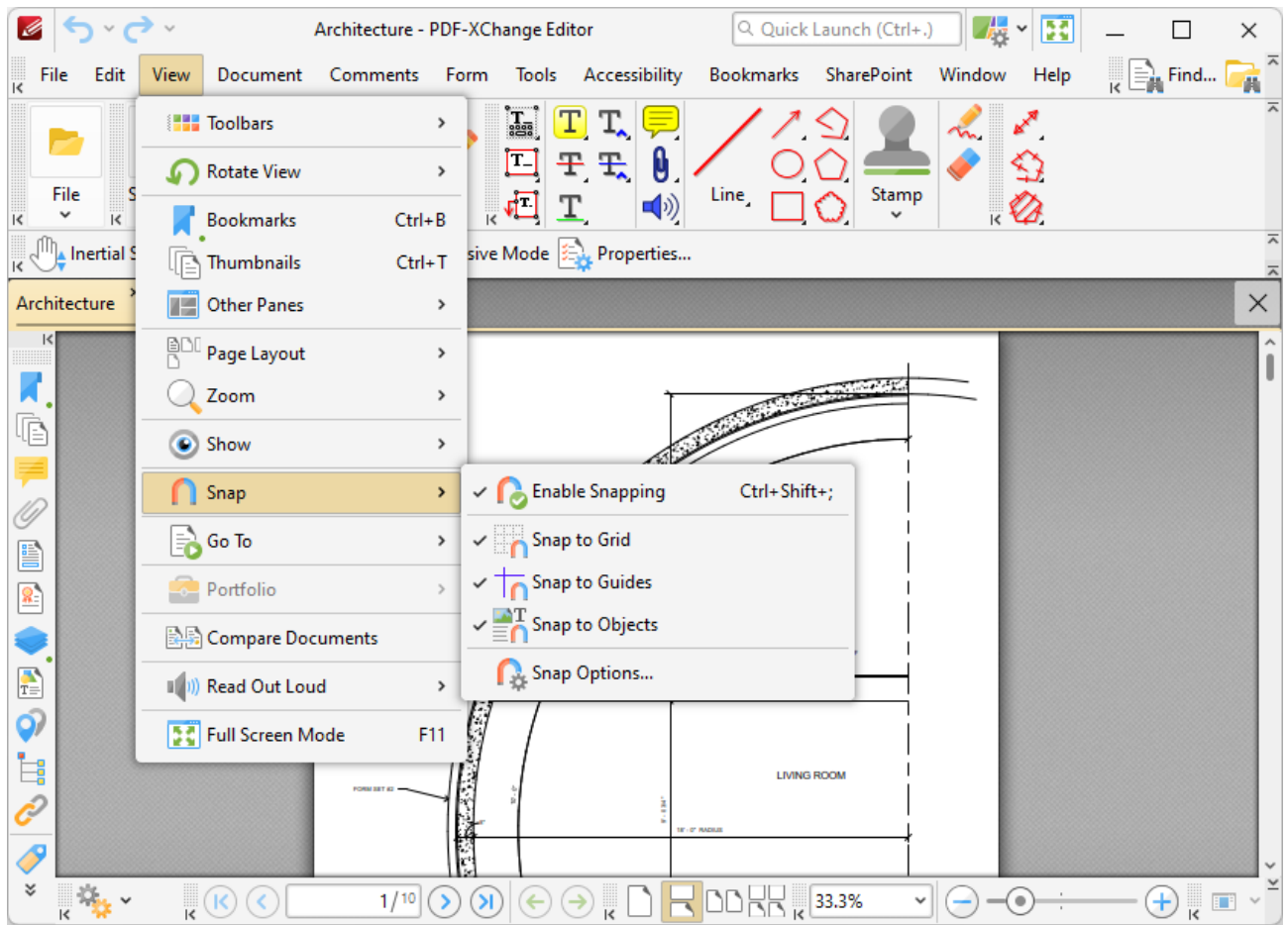
Figure 1. View Tab Submenu, Snap Options

Click **Enable Snapping** to enable the snapping feature. Snapping assists in the precise placement of annotations, comments and other page content. There are three snapping options that can be combined as desired:

- **Snap to Grid** snaps content to the placement grid, as detailed in *(figure 2)*. The placement grid is detailed **here.** [610]
- **Snap to Guides** snaps content to the guides detailed **here.** [610]
- **Snap to Objects** snaps content to document objects.

The **Snap to Grid** setting is active in the image below, and the **Rectangle Tool** is selected. This means that the rectangle corners must be located at grid intersections, and an icon displays at the current intersection during rectangle creation:
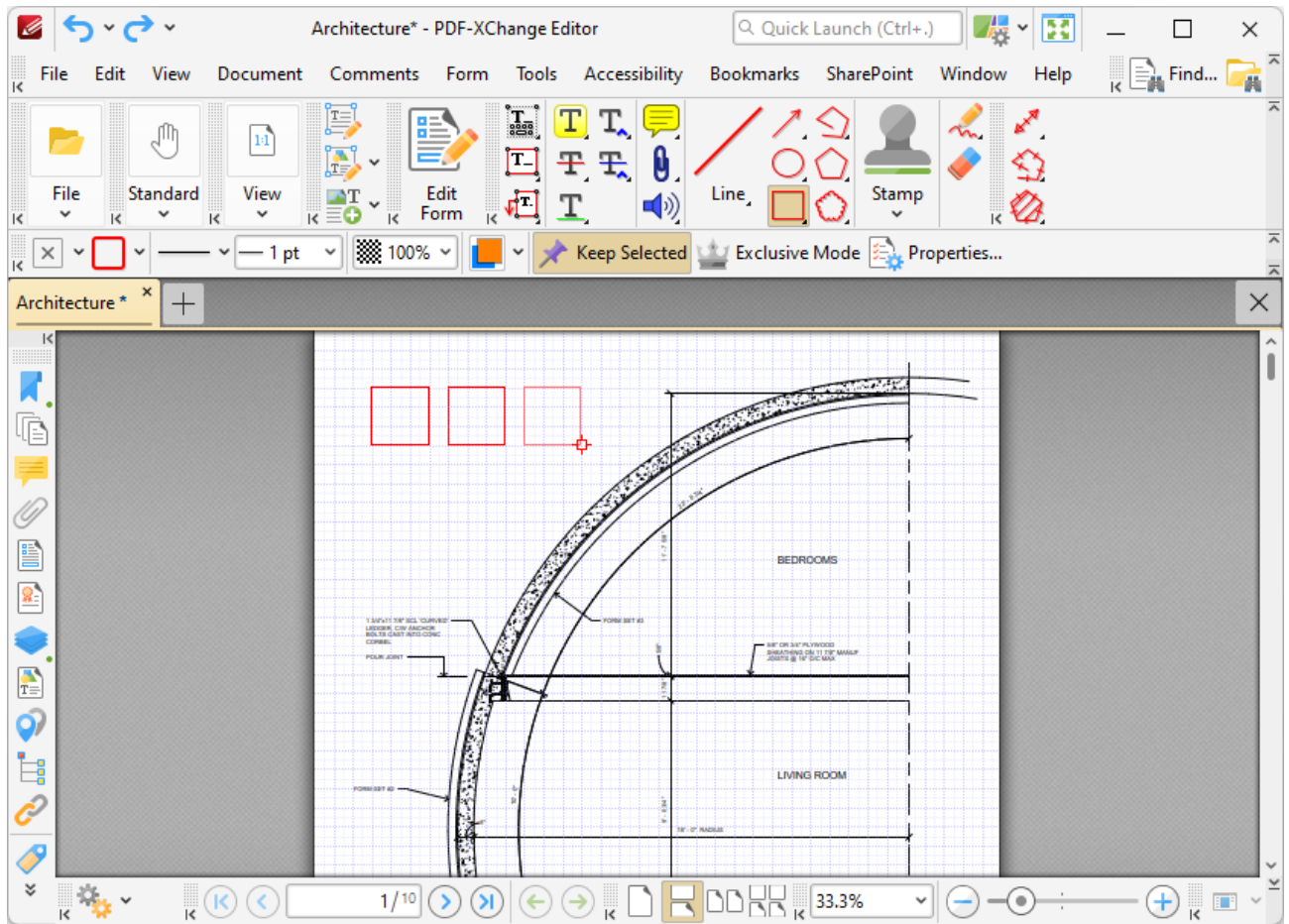
Figure 2. Snap to Grid Enabled

The **Measurement** preferences can be used to specify snapping parameters:
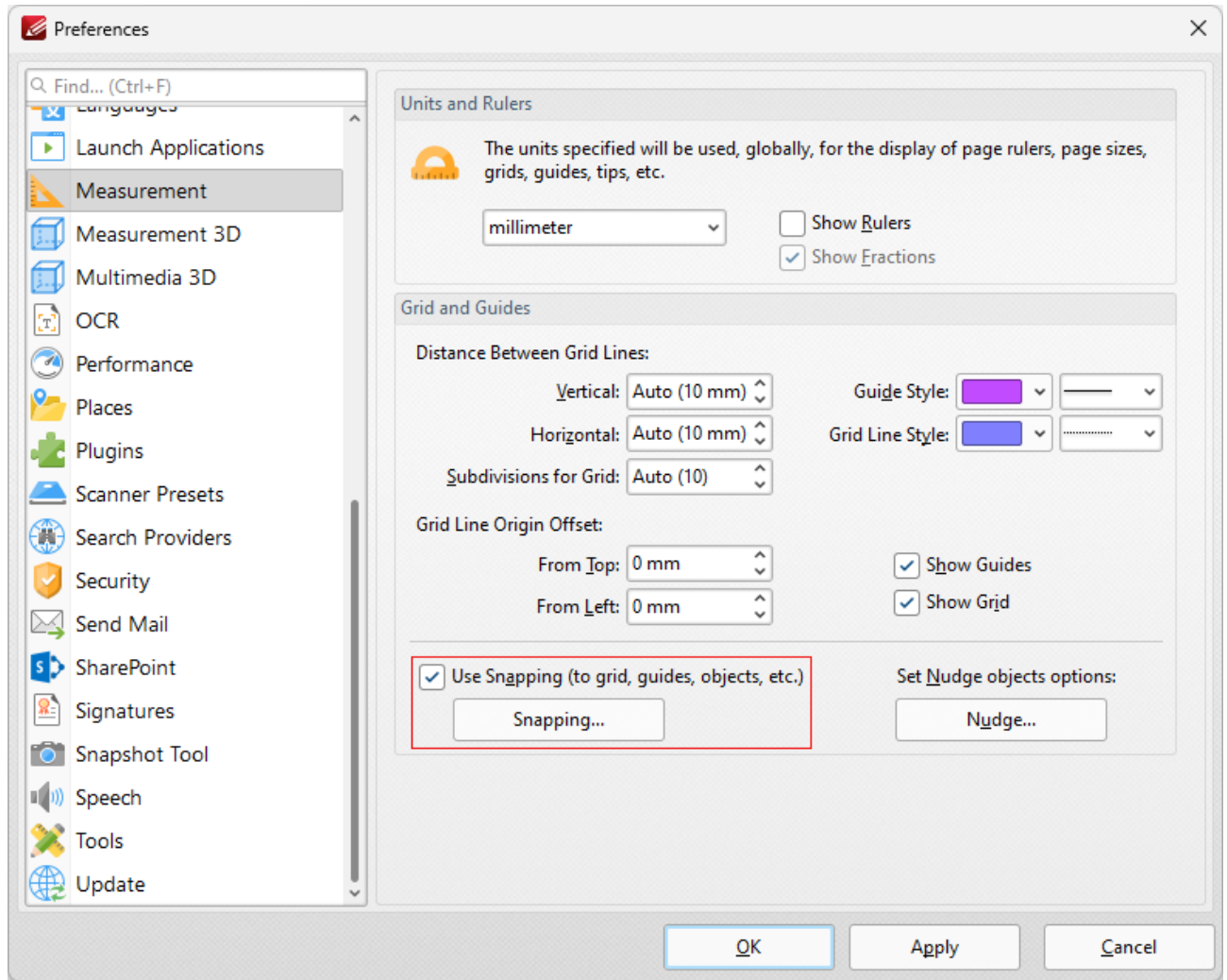
Figure 3. Measurement Preferences

When the **Use Snapping** box is selected, it is possible to click **Snapping** in order to customize additional options:
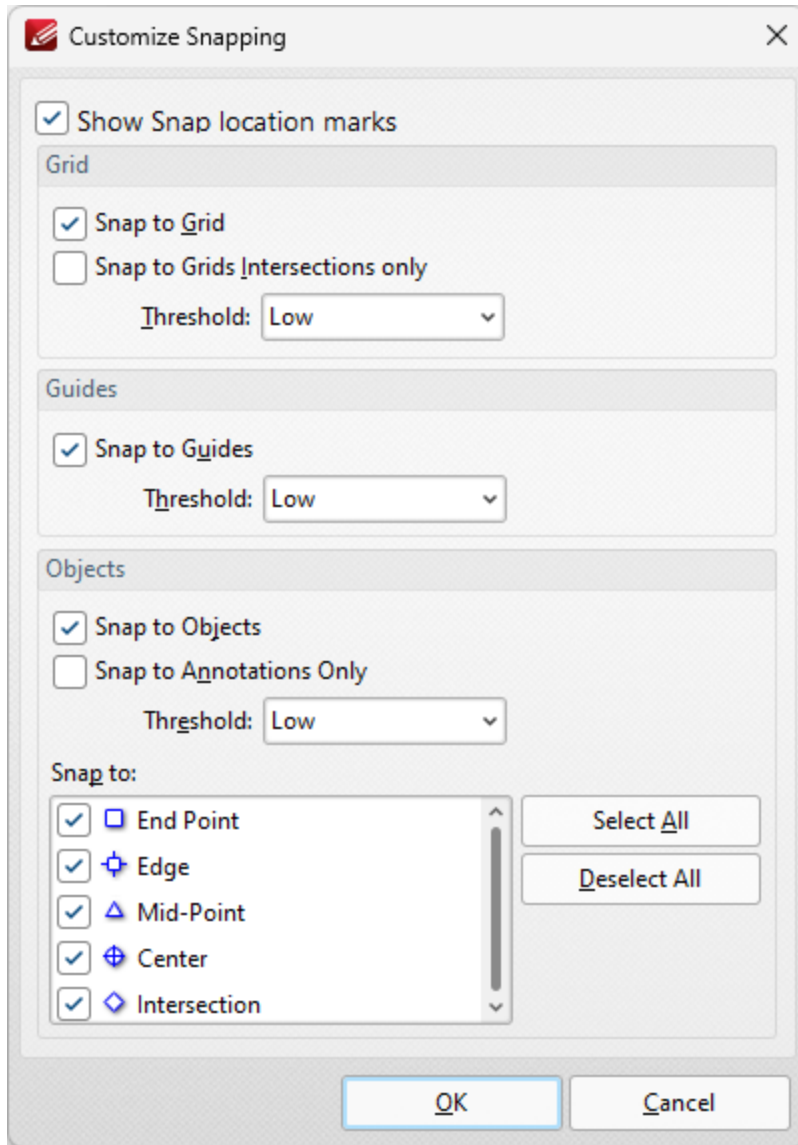
Figure 4. Customize Snapping Dialog Box

- Clear the **Show Snap location marks** box to disable the snapping icons that indicate the current location during the editing of document content.
- Clear the **Snap to Grid** box to disable snapping to grids.
- Select the **Snap to Grids Intersections only** box to snap only to the locations at which grid lines intersect, as opposed to at any location on grid lines, which is the default setting. Use the **Threshold** dropdown menu to determine sensitivity as desired.
- Clear the **Snap to Guides** box to disable snapping to guides. When this box is selected, use the **Threshold** dropdown menu to determine sensitivity.
- Clear the **Snap to Objects** box to disable snapping to objects. Select the **Snap to Annotations Only** box as desired. Use the **Threshold** dropdown menu to determine sensitivity as desired.
- Use the **Snap to** options to determine the locations at which snapping is operational. The icons detailed in the box will appear when the pointer is hovered over these locations in the active document.

Click **OK** to save changes.

5.3.10   Go To

Go To

Hover over **Go To** to view document navigation options:
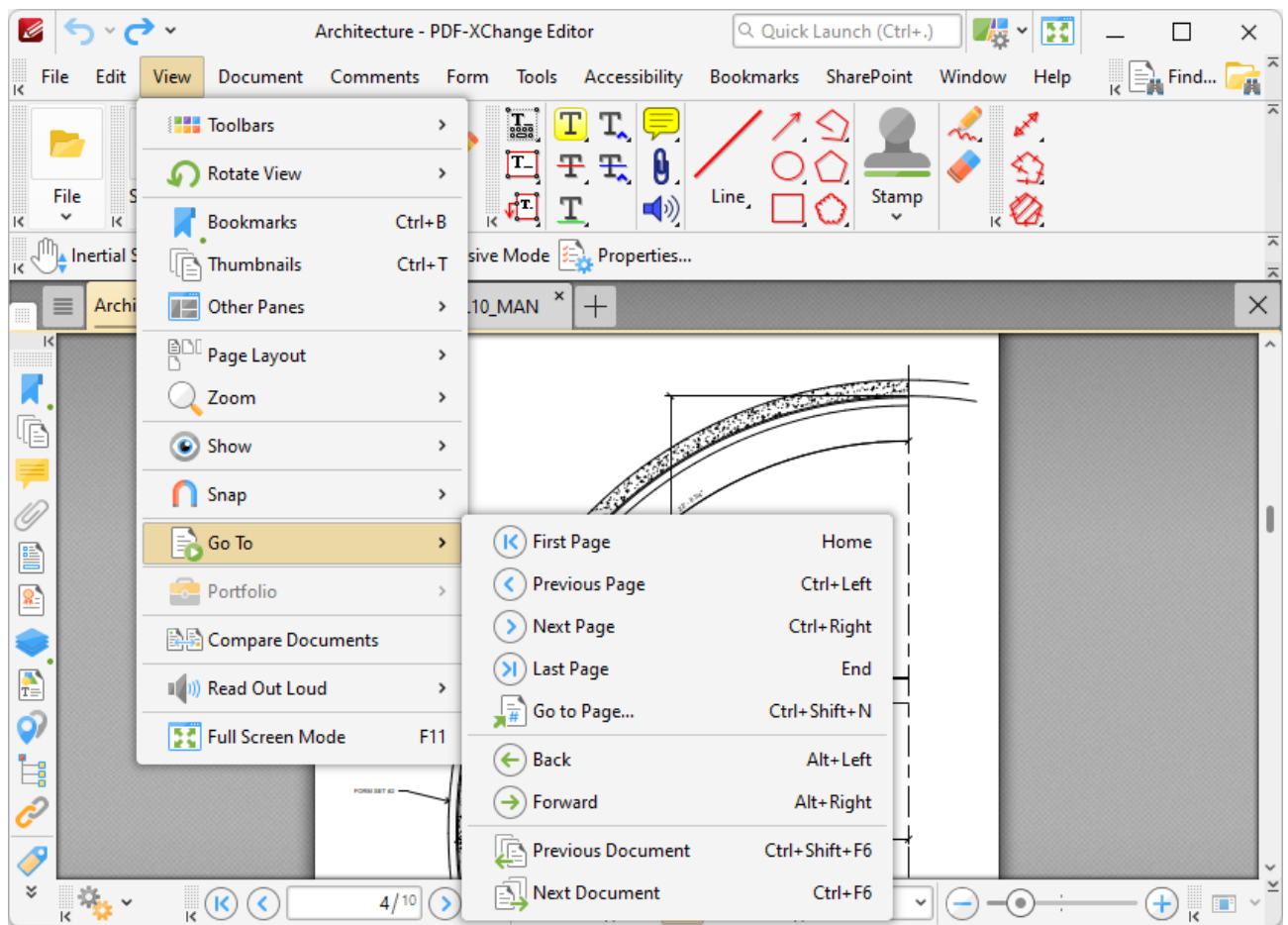
Figure 1. View Tab Submenu, Go To Options

These options enable quick navigation between documents and document pages:

- Click **First Page** to move to the first page of the active document.
- Click **Previous Page** to move to the previous page.
- Click **Next Page** to move the next page.

- Click **Last Page** to move to the last page.
- Click **Go To Page** to move to a specific page. The **Go To Page** dialog box will open. Enter the desired page in the number box and click **OK** to move there.
- Click **Back** to move to the previous view.
- Click **Forward** to move to the next view. This option is available when the **Back** option has been used.
- Click **Previous Document** to move to the previous open document.
- Click **Next Document** to move to the next open document.

5.3.11   Portfolio

Portfolio

Hover over **Portfolio** to view the portfolio submenu:
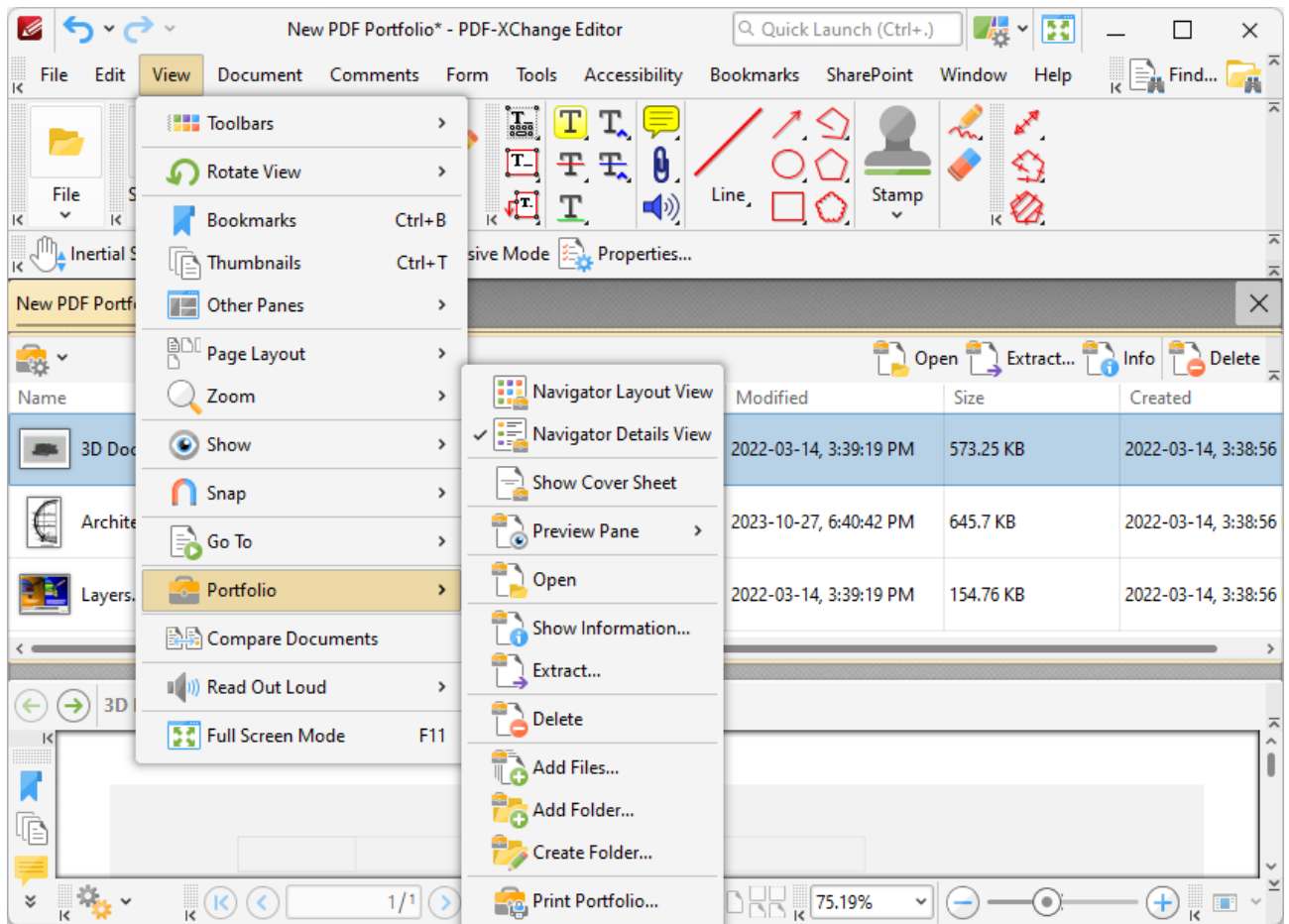
Figure 1. View Tab Submenu, Portfolio Options

PDF portfolio files are a unique format of PDF file in which multiple files are assembled into an integrated PDF unit. The **Portfolio** settings detailed below are for PDF portfolio files and are only available when these files are open in **PDF-XChange Editor:**

- Click **Navigator Layout View** to display the content of portfolio files in their expanded format, or **Navigator Details View** to display the content of portfolio files in list format.
- Click **Show Cover Sheet** to show/hide the portfolio cover sheet.
- Click **Preview Pane** to set the location of the preview pane as **Auto, Right** or **Bottom** (in the **PDF-XChange Editor** window), or select **Off** to disable the preview pane.
- Click **Open,** or double-click documents in the list of documents in the portfolio file, to open documents in the default application for their file format.
- Click **Show Information** to view the file properties of selected files in the list of files within the portfolio file.
- Click **Extract** to extract selected files from the portfolio file.
- Click **Delete** to delete selected files from the portfolio file.
- Click **Add Files/Folder** to add files/folders to the portfolio file.
- Click **Create Folder** to add a new folder to the portfolio file. You can click and drag documents in the portfolio file into new folders as desired.
- Click **Print Portfolio** to print portfolio files, as detailed **here.** [179]

If the portfolio file contains PDF documents, then you can use the editing options in the preview pane, or the main tabs of **PDF-XChange Editor,** to edit the PDF documents:
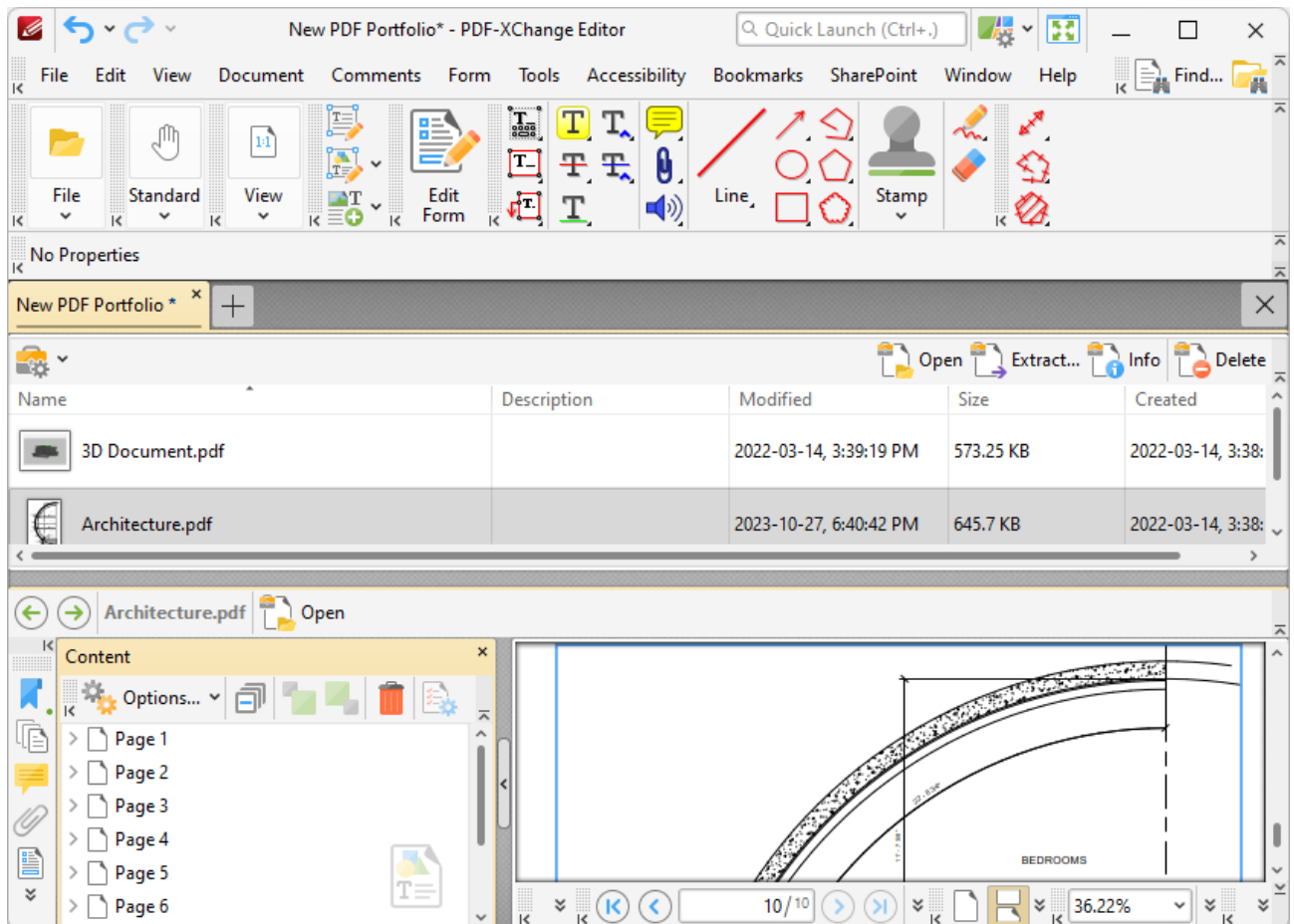
Figure 3. Document Edited via the Preview Pane

Right click the main window for additional options:
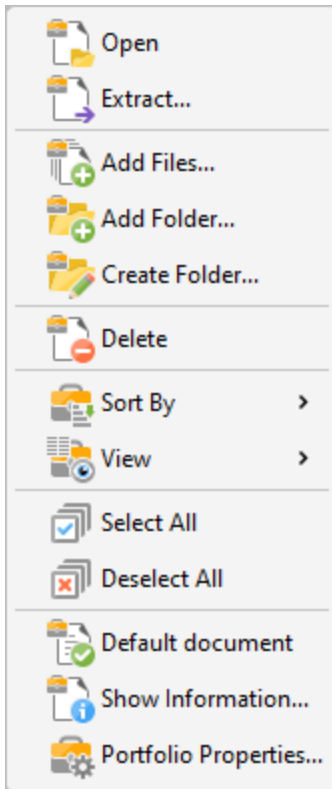
Figure 4. Portfolio File Right-Click Submenu

- Click **Open** to open documents in the default application for their file format.
- Click **Extract** to extract selected files from the portfolio file.
- Click **Add Files/Folder** to add files/folders to the portfolio file.
- Click **Create Folder** to add a new folder to the portfolio file.
- Click **Delete** to delete selected files from the portfolio file.
- Click **Sort by** to determine the criteria used to sort the component files of portfolio files.
- Click **View** to determine the file information that is displayed in the file list of the main window when portfolio files are open.
- Click **Select All/Deselect All** to select/deselect all files in portfolio files.
- Click **Default document** to specify selected documents as the default document in portfolio files. The default document is displayed when the portfolio file is opened.
- Click **Show Information** to view the file properties of files within portfolio files.
- Click **Portfolio Properties** to view/edit file properties for portfolio files. The **Portfolio Properties** dialog box will open, as detailed below.
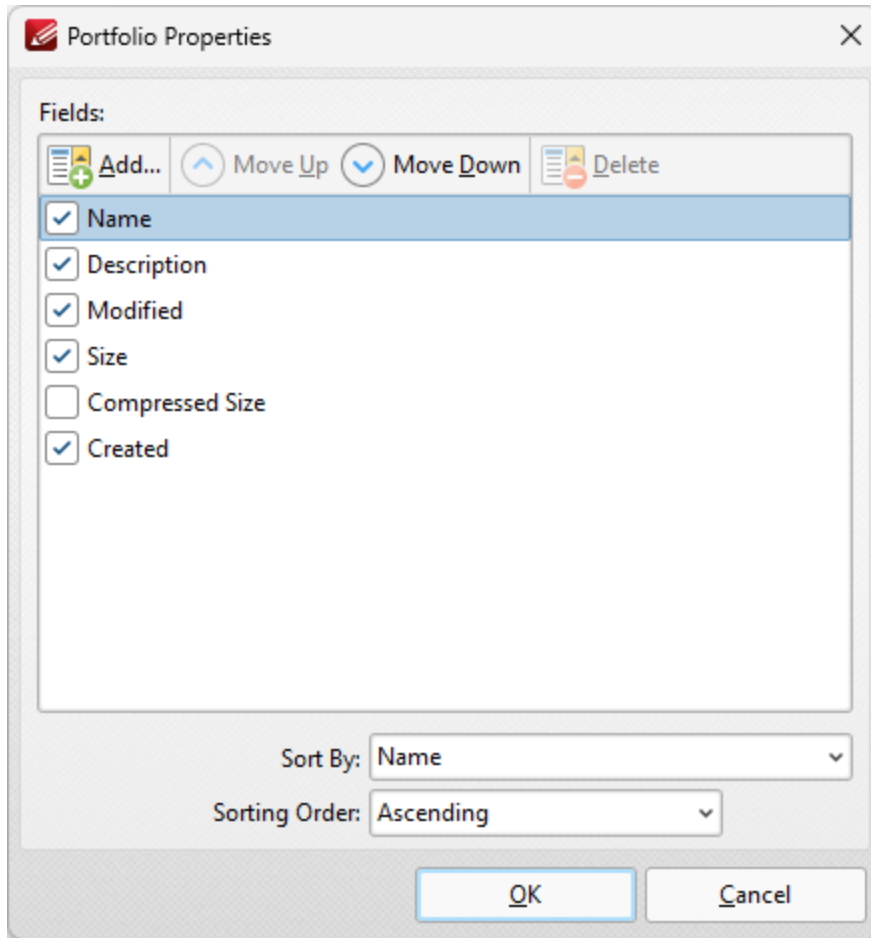
Figure 5. Portfolio Properties Dialog Box

- Select or clear property boxes to determine which properties are displayed in the main window of **PDF-XChange Editor.**
- Click **Add** to add new portfolio properties to the portfolio file. The **New Schema Field** dialog box will open. Enter a name for the new property and use the dropdown menu to determine the type of property to be created, then click **OK** to create the new portfolio property.
- Click **Move Up/Move Down** to move selected properties up or down within the list of properties. Note that the order of properties in the **Portfolio Properties** dialog box determines the order in which properties are displayed in the main window of **PDF-XChange Editor.**
- Click **Delete** to delete selected properties. Note that this option is only available for custom properties.
- Use the **Sort By** dropdown menu to determine the property used to sort documents in the main window of **PDF-XChange Editor.**
- Use the **Sorting Order** dropdown menu to specify either **Ascending** or **Descending** as the order in which documents are sorted according to the **Sort by** property in the main window of **PDF-XChange Editor.**

You can create portfolio files in **PDF-XChange Editor** via the **New Document** option detailed <u>here.</u> 116

5.3.12   Compare Documents

![PDF-XChange Editor icon] **Compare Documents**

Click **Compare Documents** to compare documents:
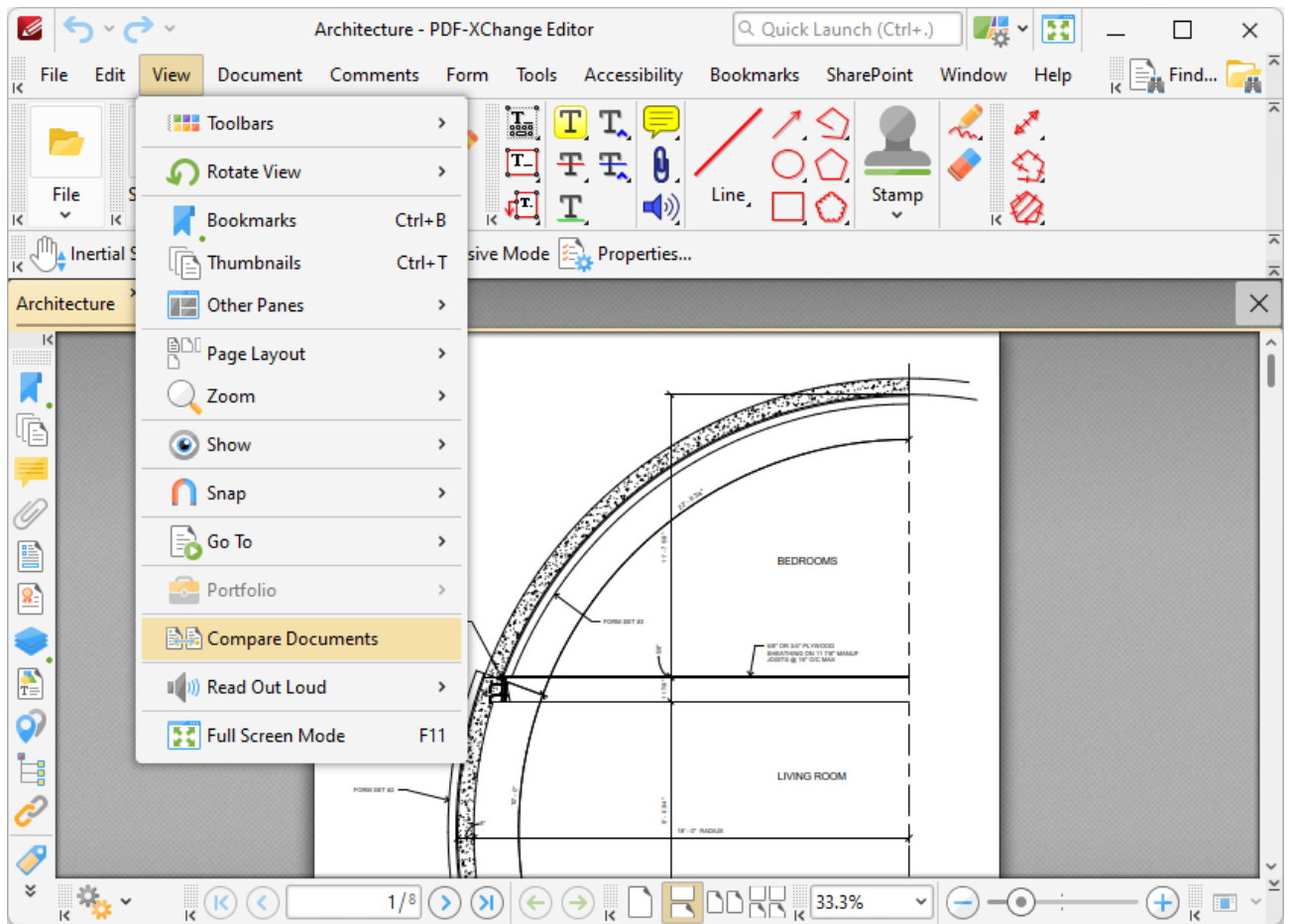
Figure 1. View Tab Submenu, Compare Documents

The **Compare Documents** dialog box will open:
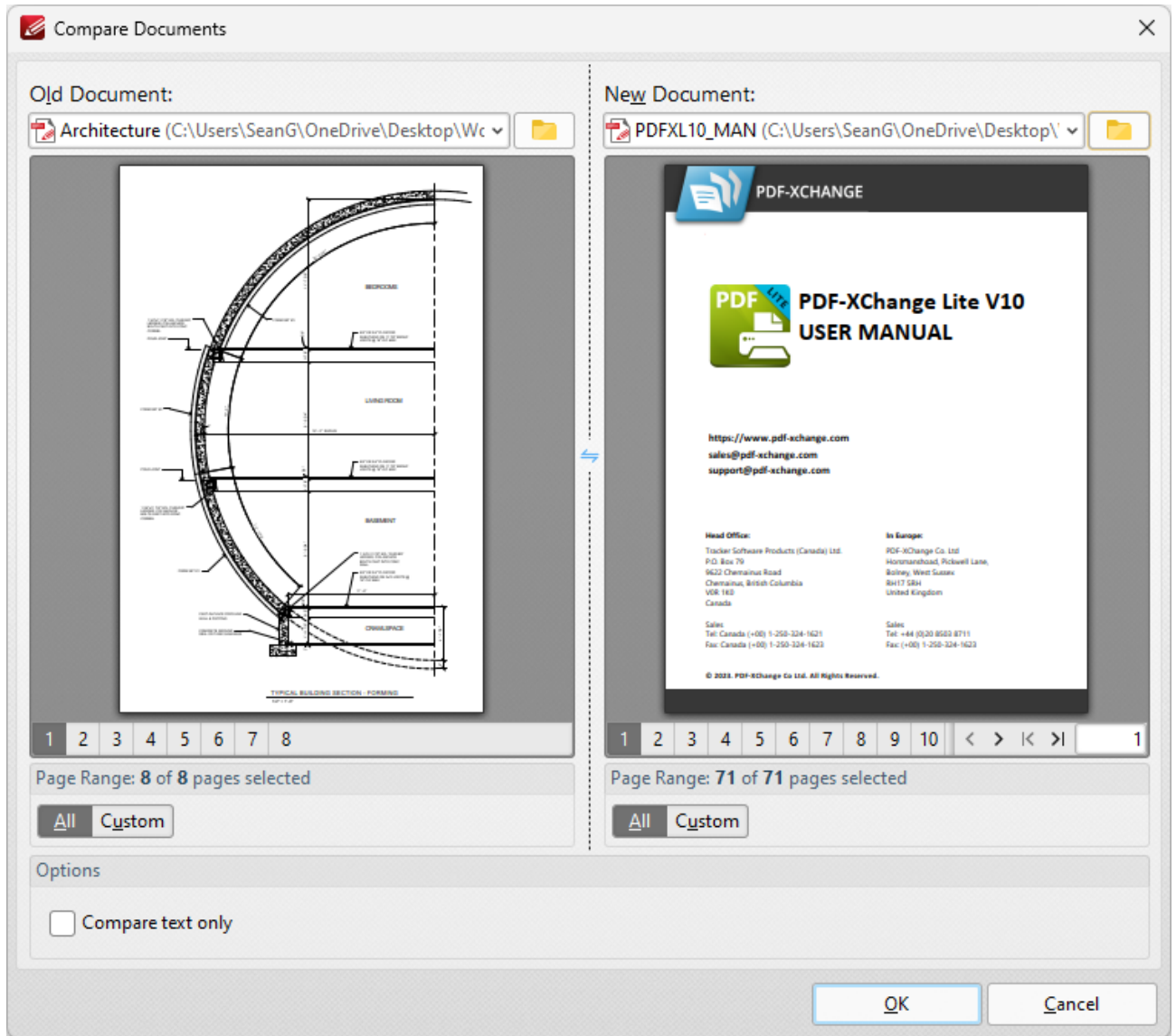
Figure 2. Compare Documents Dialog Box

The current document is detailed in the left pane. Use the dropdown menu in the right pane to determine the document to which you want to compare the current document, or click and drag the document into the pane, then click **OK** to perform the document comparison. Select the **Compare Text Only** box if you want to compare only text between the documents, and not text styles such as fonts, colors and text size. When the document comparison is complete a new document tab will open with the results:
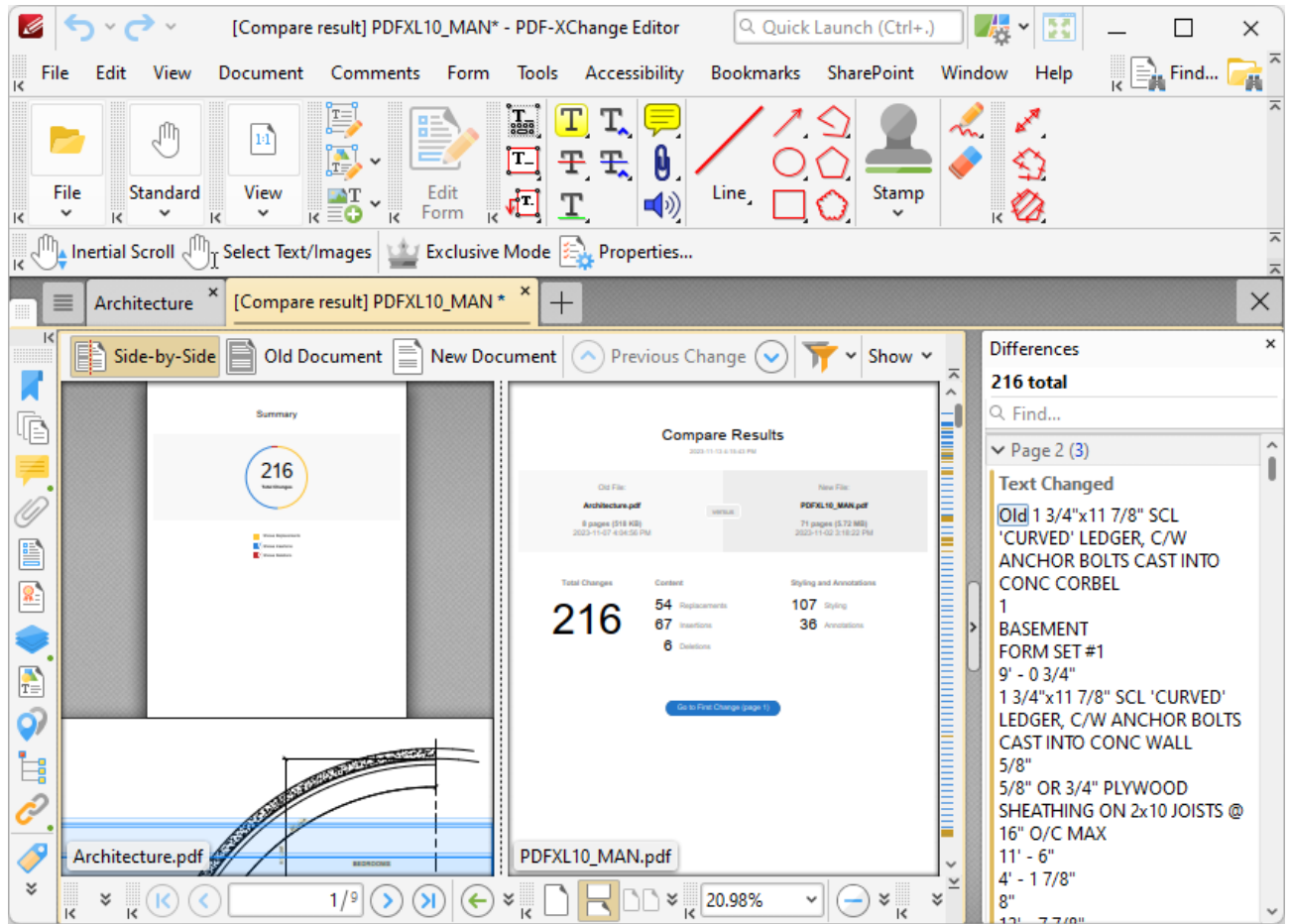
Figure 3. Compare Documents Output

Browse through the output document to view replacements, insertions and deletions between the two source documents. The **Differences** pane displays a breakdown of changes to text between the documents. Use the options in the viewing window for further options:

- Click **Old Document** to view the initial document that was open in **PDF-XChange Editor.**
- Click **New Document** to view the document to which the initial document was compared.
- Click **Previous Change** to scroll backwards to the previous change between the documents.
- Click **Next Change** to scroll forward to the next change between the documents.
- Click the filter icon to determine which changes are displayed. The options are **Text, Formatting, Images, Annotations, Headers and Footers** and **Backgrounds.**
- Click the **Show** dropdown menu to determine how results are displayed.

Please note that a license for **PDF-XChange Editor Plus/PDF-XChange PRO** is required in order to use this feature in an unrestricted capacity.

5.3.13   **Full Screen Mode**

 Full Screen Mode

Click **Full Screen** to enable full screen mode:
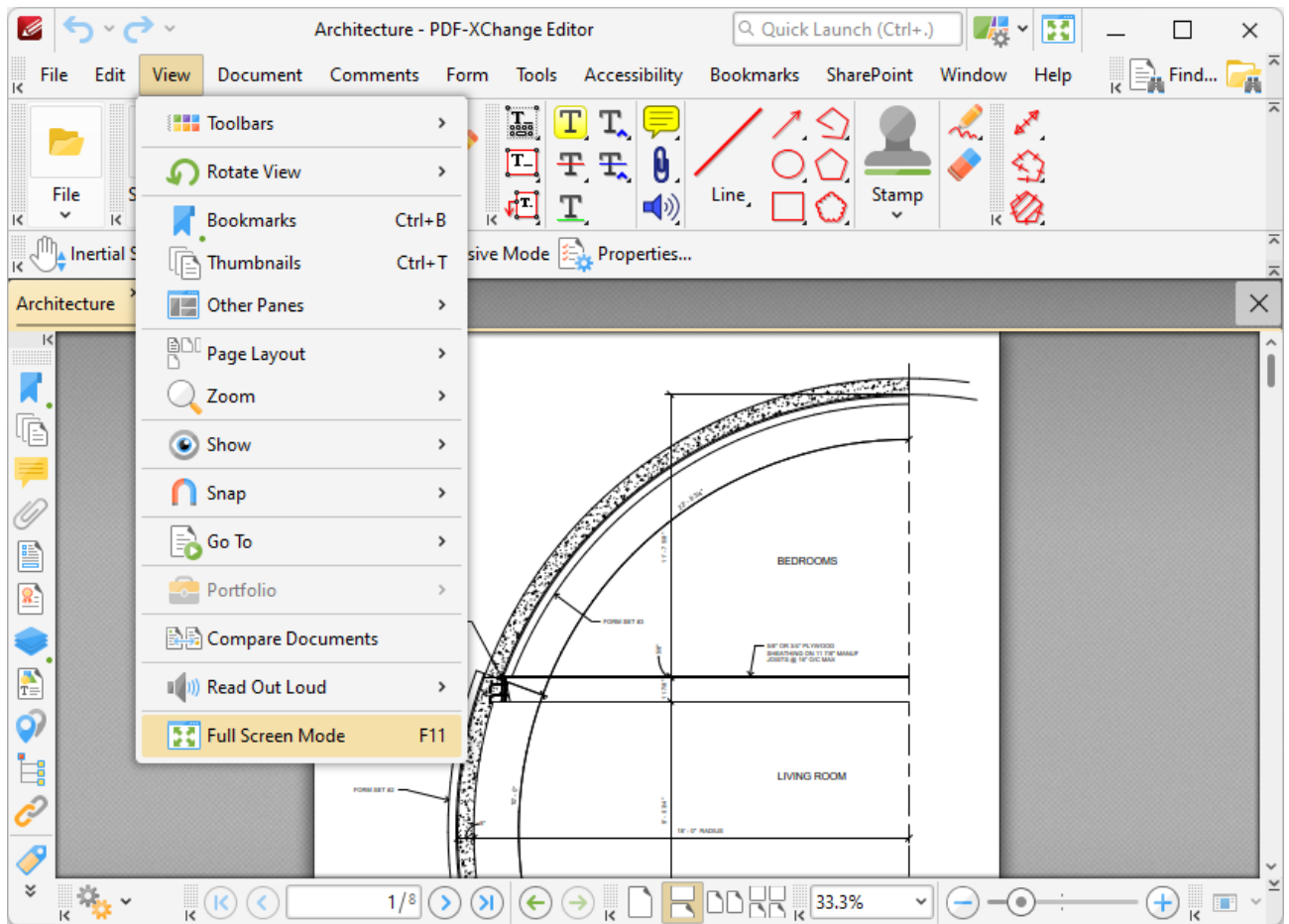
Figure 1. View Tab Submenu, Full Screen Mode

See **here** 262 to view/edit adjustable parameters for full screen mode.

5.4   Document

Document

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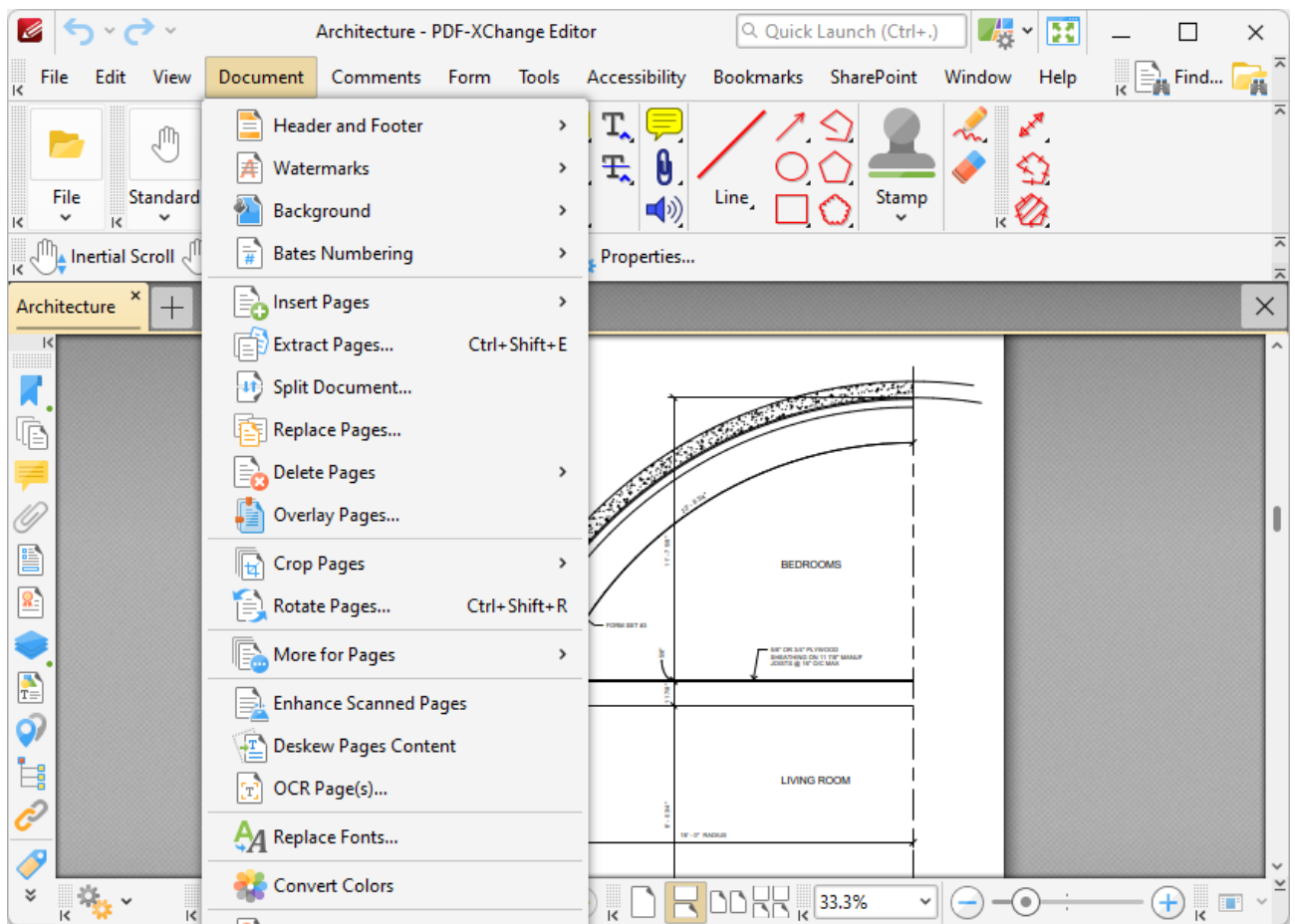
Figure 1. Document Tab Submenu

These options are used to edit documents. Click the links below for further information:

- **Header and Footer** 633
- **Watermarks** 637
- **Background** 640

5.4.1 **Header and Footer**

Header and Footer

Hover over **Header and Footer** to view header and footer options:
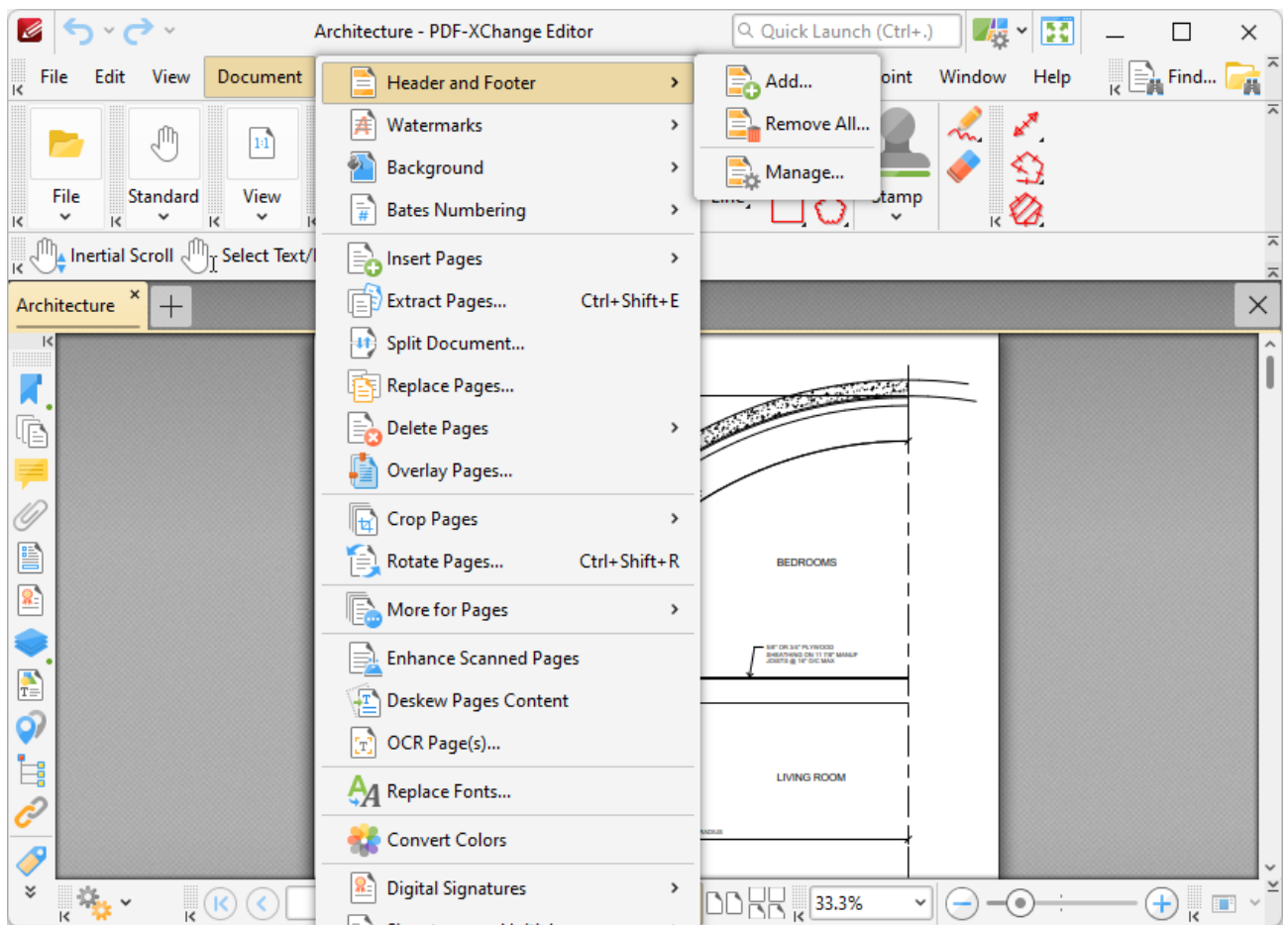
Figure 1. Document Tab Submenu, Header and Footer

- Click **Add** to add new headers and footers. The **Add Header and Footer** dialog box will open, as detailed in *(figure 2)*.
- Click **Remove All** to remove all existing headers and footers.
- Click **Manage** to manage existing headers and footers.
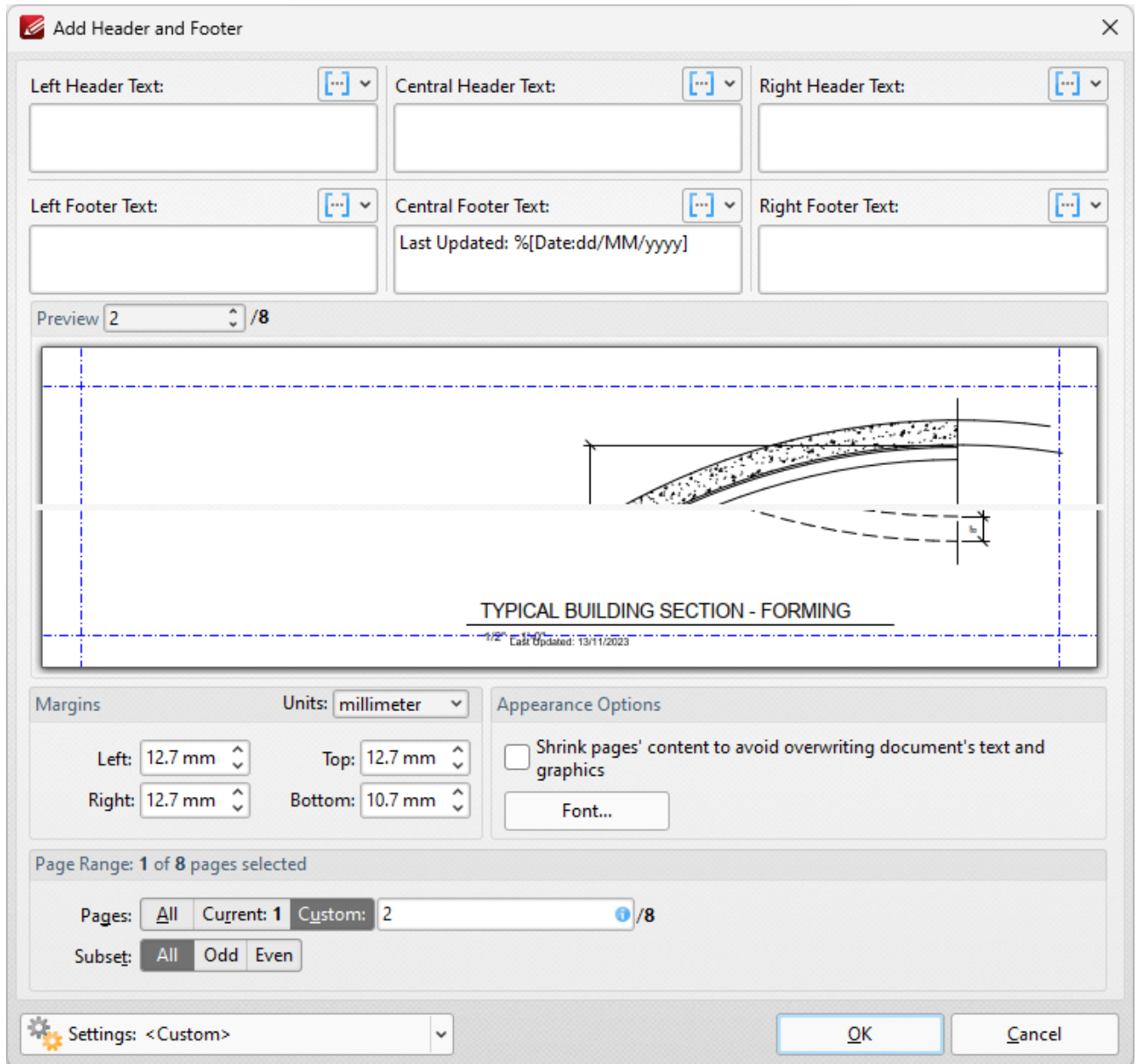
Figure 2. Add Header and Footer Dialog Box

- Enter text in the text boxes to insert headers/footers on the left/center/right of pages as desired. Alternatively, click the [macro icon] macro icon to use macros as the source for header/footer text. Further information about macros is available **here.** [1157]
- Click **Font** to determine the font settings for headers and footers, as detailed below.
- Use the **Margins** settings to reposition the location of headers/footers.
- Select the **Shrink pages' content to avoid overwriting document's text and graphics** box to shrink page content in order to ensure headers and footers do not overlap with existing page content when they are added to the document.
- Enter page numbers in the **Preview Page** number box to view a preview of headers/footers in the preview window.
- The **Page Range** options are as follows:

- Select **All** to add headers/footers to all pages.
- Select **Current** to add headers/footers to only the current page.
- Select **Custom** to add headers/footers to a custom page range. Further information on creating custom page ranges is available **here.** 1274
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Click the **Settings** dropdown arrow to save/delete customized settings and/or manage existing customized settings:

  - Click 🖫 to save settings.
  - Click 🗑 to remove settings.
  - Click ⚙ to manage settings.

Click **OK** to create headers/footers.
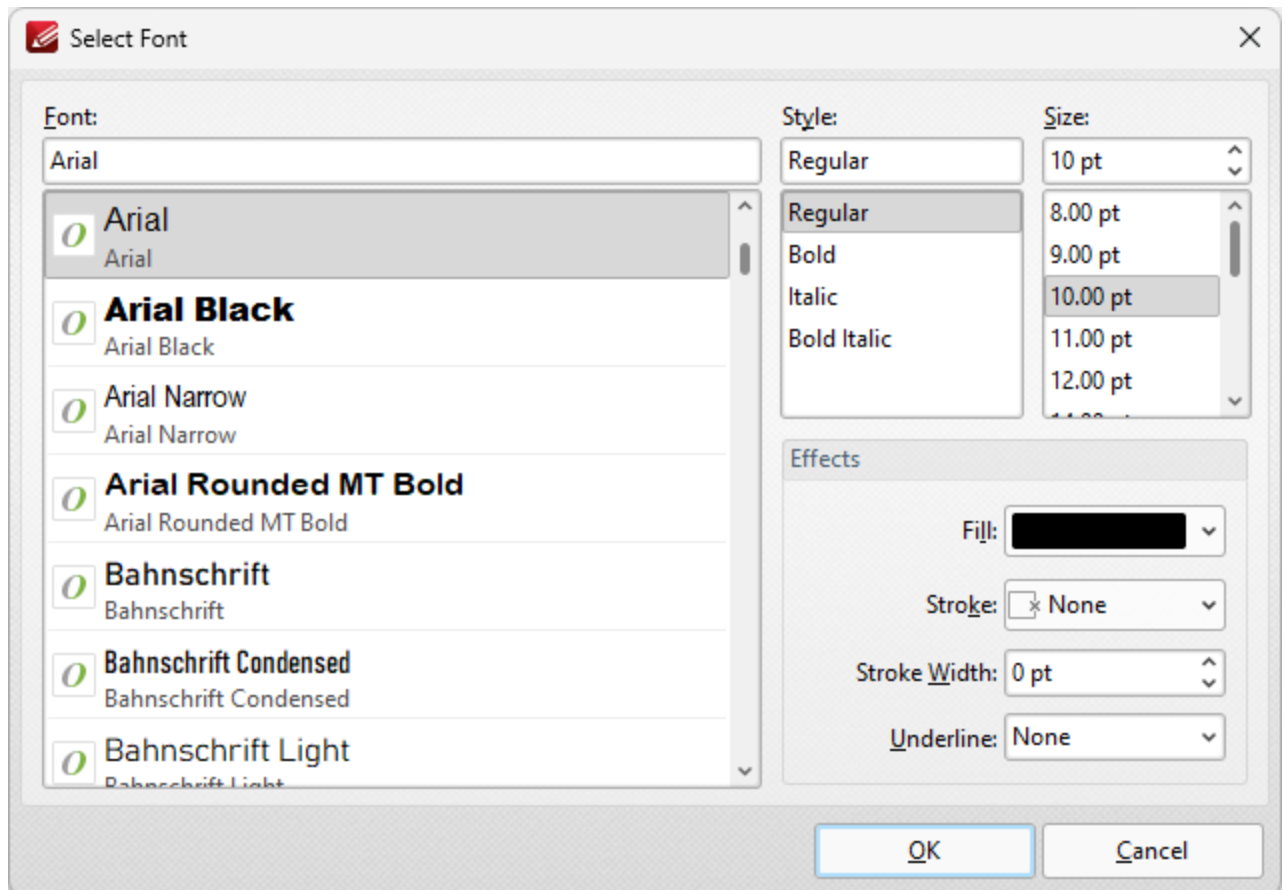
Figure 3. Select Font Dialog Box

- Use the **Font** text box to enter the name of the desired font, or select one from the options listed below the text box.
- 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.

5.4.2 Watermarks

 Watermarks

Hover over **Watermarks** to view watermark options:
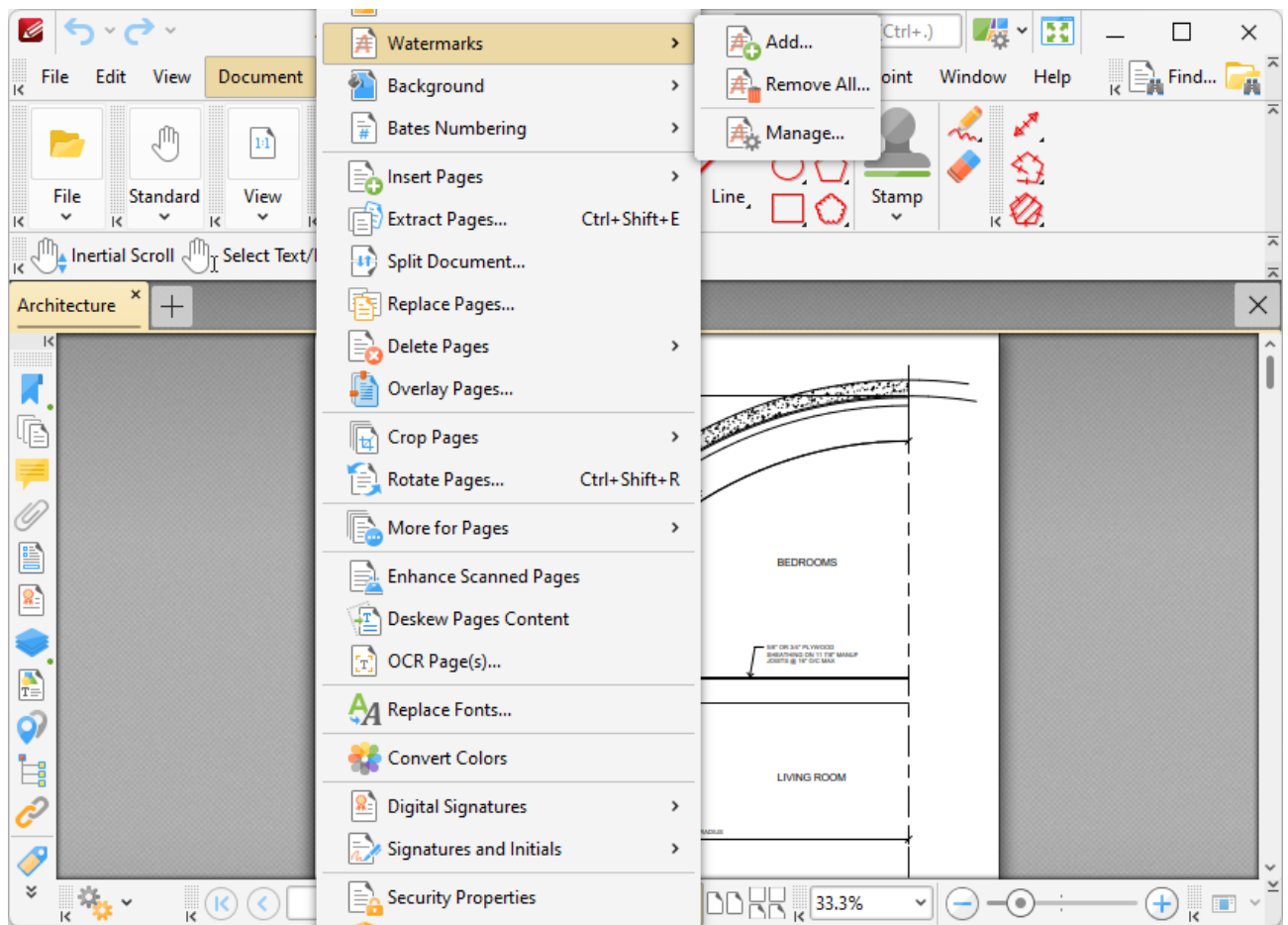
Figure 1. Document Tab Submenu, Watermarks

- Click **Add** to add new watermarks. The **Add Watermark** dialog box will open, as detailed in *(figure 2).*
- Click **Remove All** to remove all existing watermarks.
- Click **Manage** to manage existing watermarks.
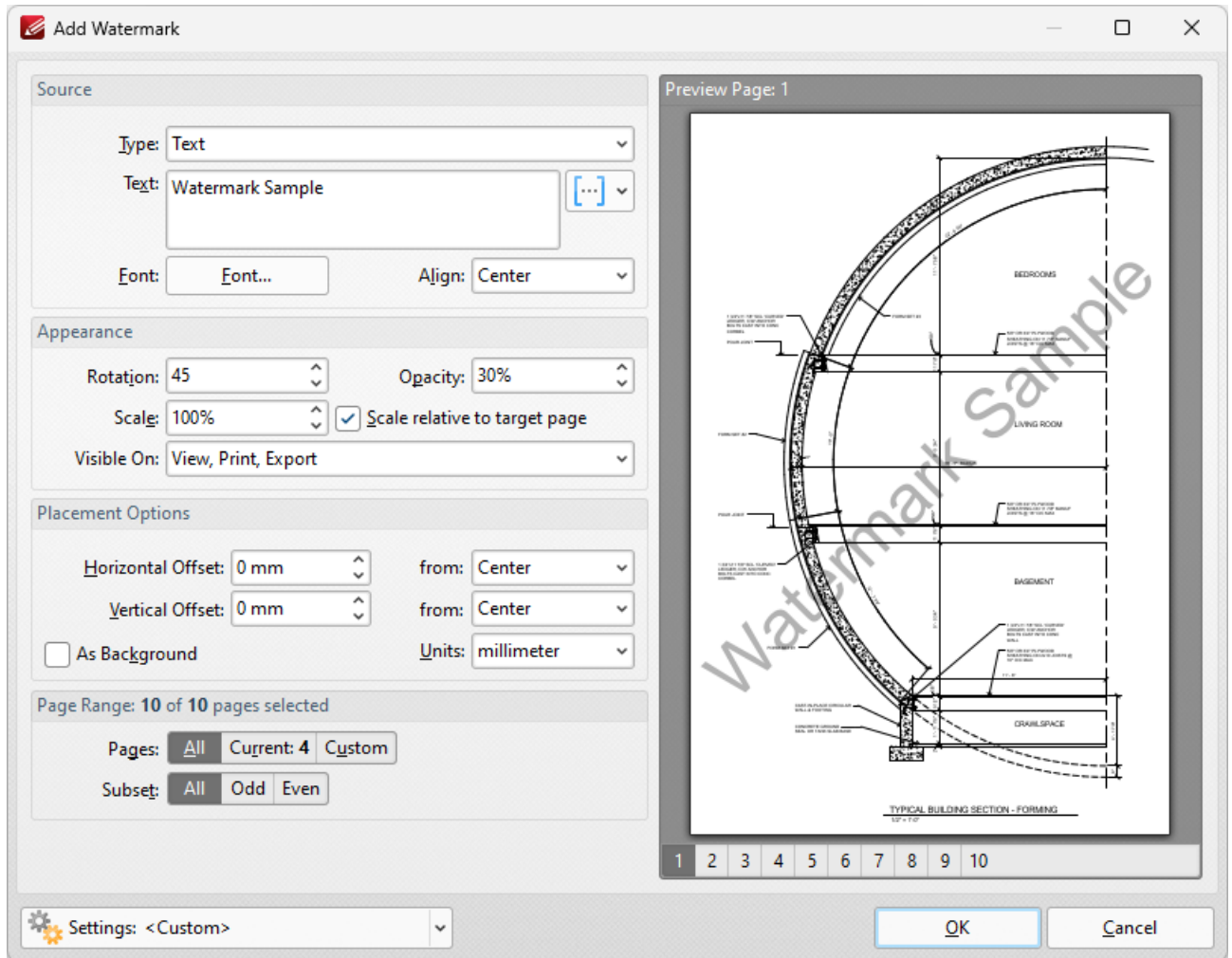
Figure 2. Add Watermark Dialog Box

- The **Source** options determine the source of watermarks. Enter text into the box or select a file. Use the font, **macro** [1157] and alignment options to customize watermarks when text is used.
- The **Appearance** options determine the rotation, opacity and scale of the watermark:
  - The **Rotation** value determines the rotation (in degrees) of watermarks.
  - The **Opacity** value determines the opacity (transparency) of watermarks.
  - The **Scale** value determines the scale of watermarks. Select the check box to scale watermarks to the target page. If this box is not selected then the scale is relative to the size of the original image used as the source for the watermark.
  - The **Visible On** dropdown menu determines when the watermark will be visible. Select **View, Print** and/or **Export** as desired.
- 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 watermarks into the background as opposed to the foreground of documents.
- The **Page Range** options are as follows:
  - Select **All** to add watermarks to all pages.

- Select **Current** to add a watermark to only the current page.
- Select **Custom** to add a watermark to a custom page range. Further information on creating custom page ranges is available **here.** 1274
- 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 pane to preview the corresponding document pages.
- The **Settings** menu features two predefined watermarks: **Draft** and **Confidential**. The remaining options relate to customized settings:

  - Click to save settings.
  - Click to remove settings.
  - Click to manage settings.

Click **OK** to create watermarks.

5.4.3   **Background**

Background

Hover over **Background** to view background options:
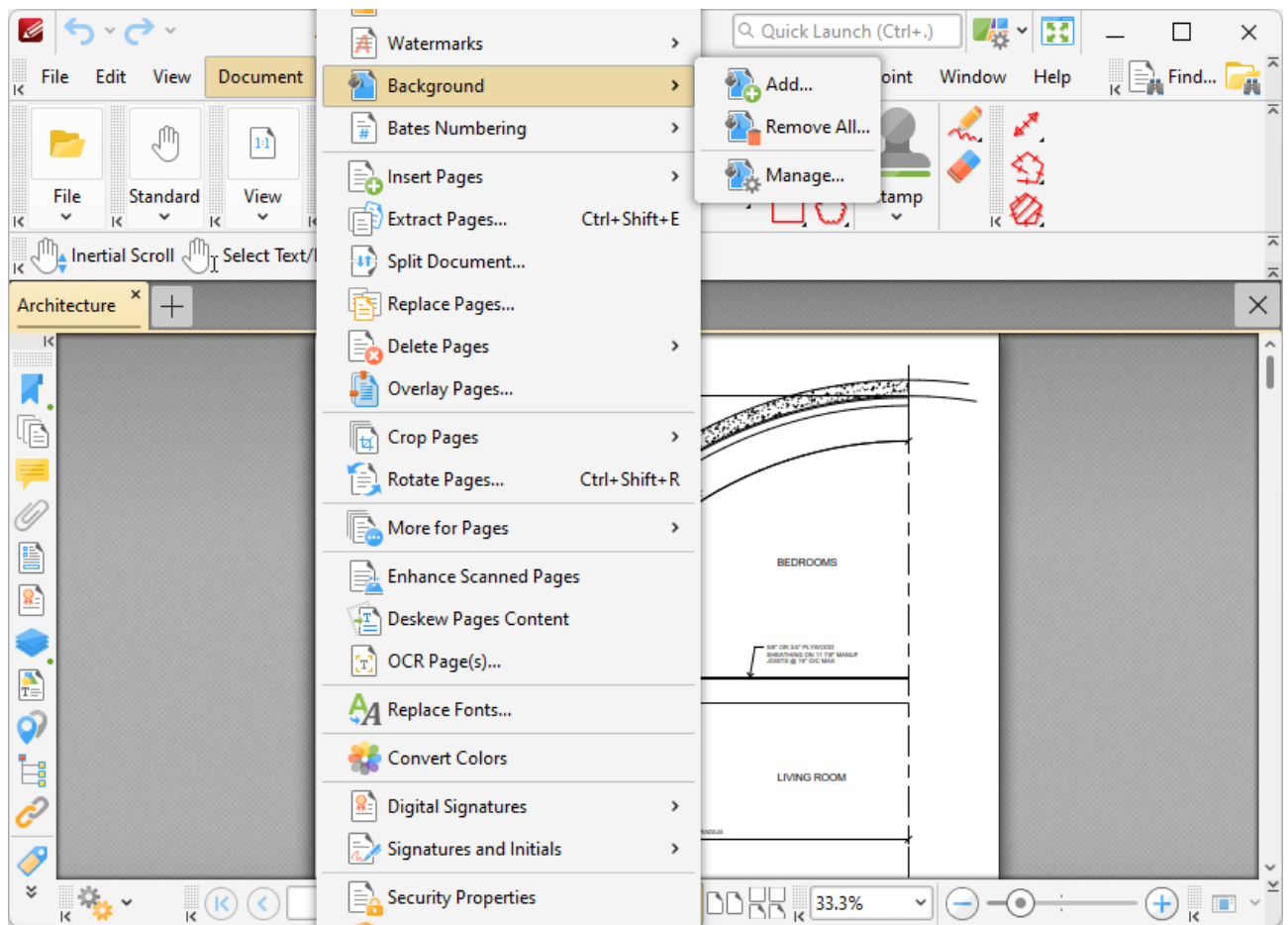
Figure 1. Document Tab Submenu, Background

- Click **Add** to add new backgrounds. The **Add Background** dialog box will open, as detailed in **(figure 2).**
- Click **Remove All** to remove all existing backgrounds.
- Click **Manage** to manage existing backgrounds.
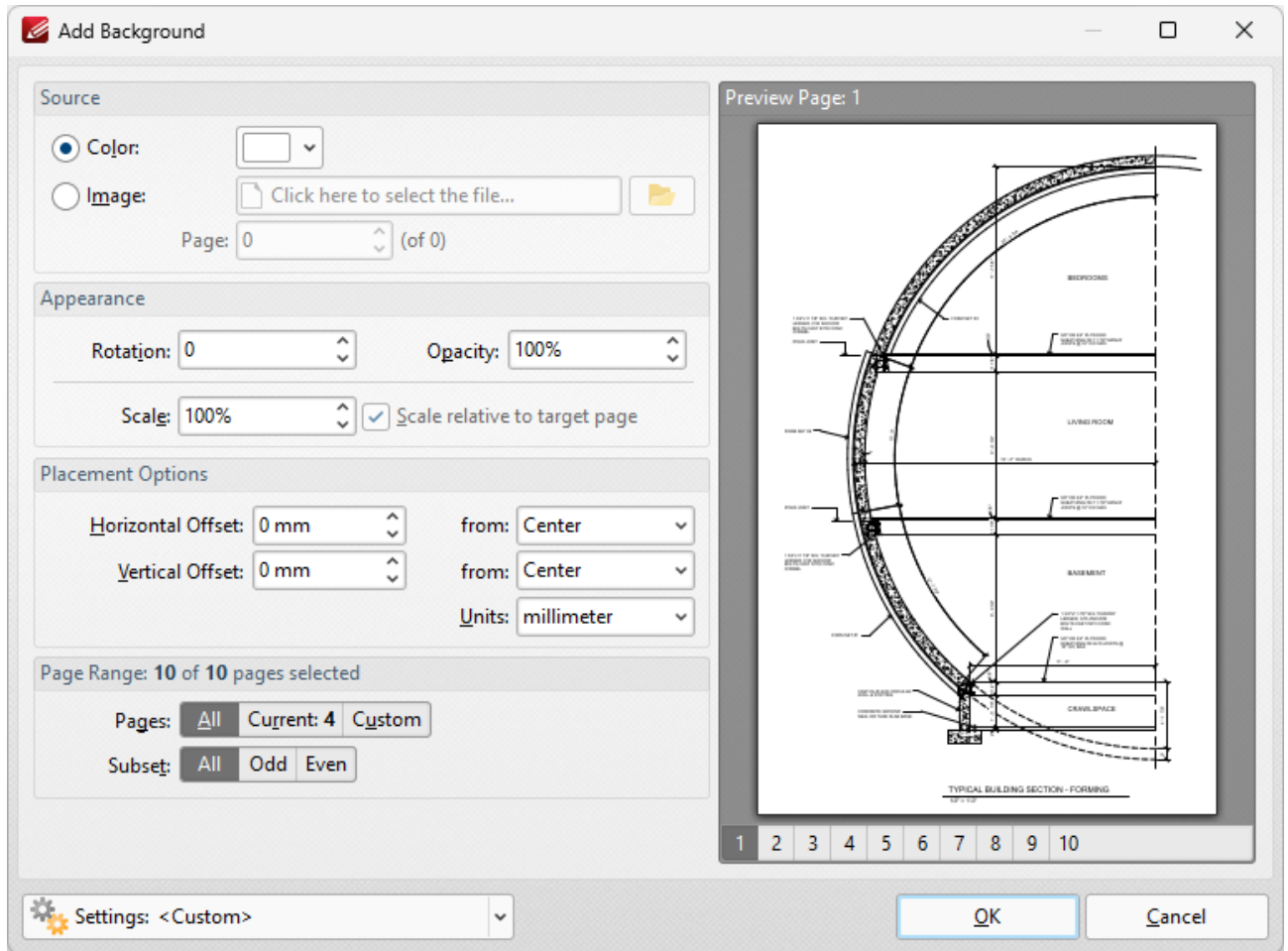
Figure 2. Add Background Dialog Box

- The **Source** options determine the source of the background:
  - Select **From Color** to add 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. Enter the page number of the desired background in the **Page** number box.
- The **Appearance** options determine the rotation, opacity and scale of the background:
  - The **Rotation** value determines the rotation (in degrees) of the background.
  - The **Opacity** value determines the opacity (transparency) of the background.
  - The **Scale** value determines the scale of backgrounds. Select the check box to scale watermarks to the target page. If this box is not selected then the scale is relative to the size of the original image used as the source for the background.
- The **Placement** options determine the horizontal and/or vertical offset of the background from the left, right or center of the document.
- The **Page Range** options are as follows:
  - Select **All** to add backgrounds to all pages.
  - Select **Current** to add a background to only the current page.

- Select **Custom** to add backgrounds to a custom page range. Further information on creating custom page ranges is available **here.** ⌐1274
- 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 pane to preview the corresponding document pages.
- Use the **Settings** dropdown menu to save/delete customized settings and/or manage existing customized settings:

  - Click 💾 to save settings.
  - Click 🗑 to remove settings.
  - Click ⚙ to manage settings.

Click **OK** to create backgrounds.

5.4.4   Bates Numbering

Bates Numbering

Hover over **Bates Numbering** to view the Bates numbering options:
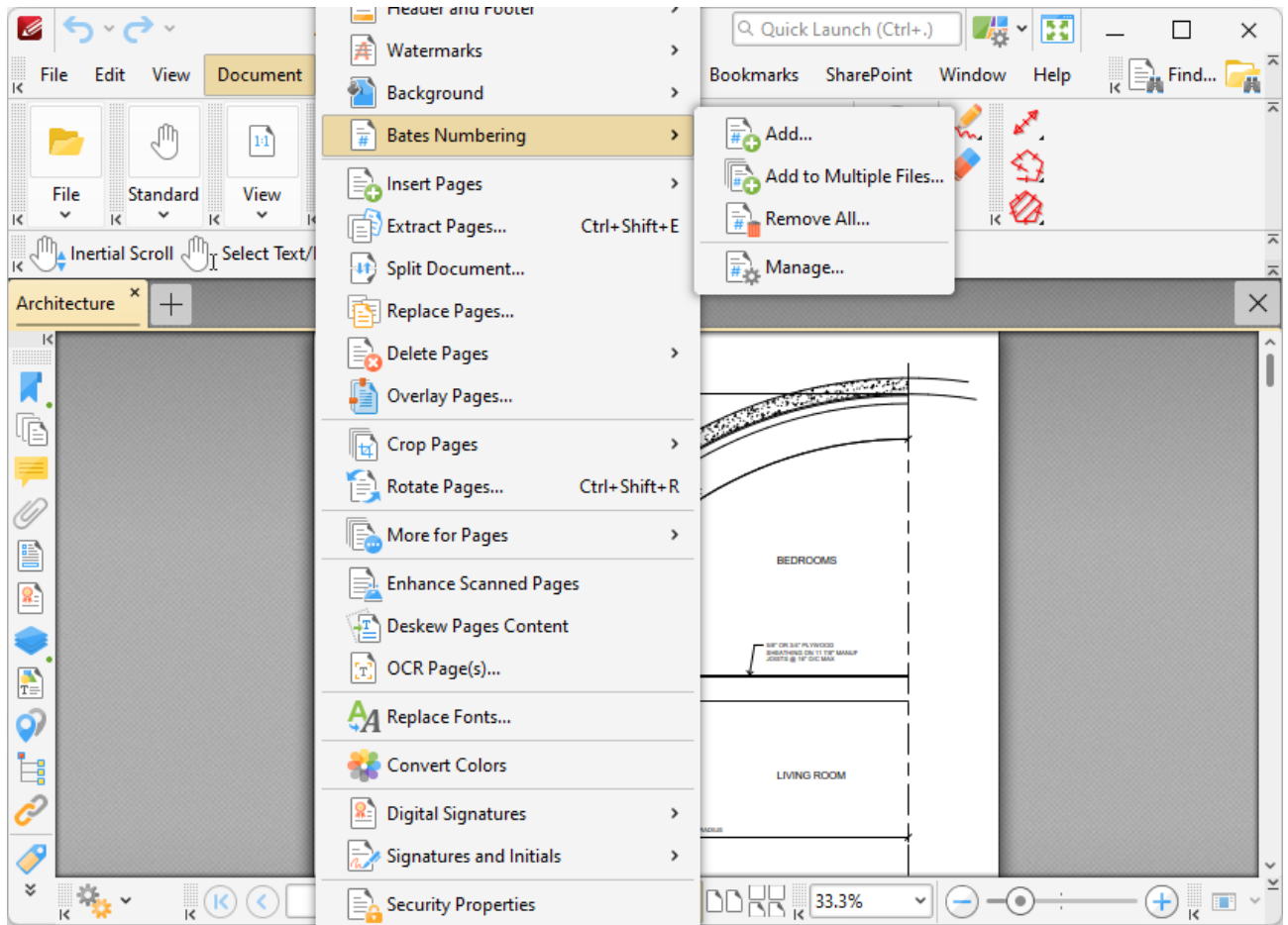
Figure 1. Document Tab Submenu, Bates Numbering

Bates numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned.

- Click **Add** to add Bates numbering to documents. The **Add Bates Numbering** dialog box will open, as detailed in *(figure 2).*

- Click **Add to Multiple Files** to add Bates numbering to multiple files. The **Add Bates Numbering to Files** dialog box will open, as detailed in *(figure 3).*
- Click **Remove All** to remove all existing Bates numbering.
- Click **Manage** to manage existing Bates numbering.

Add Bates Numbering
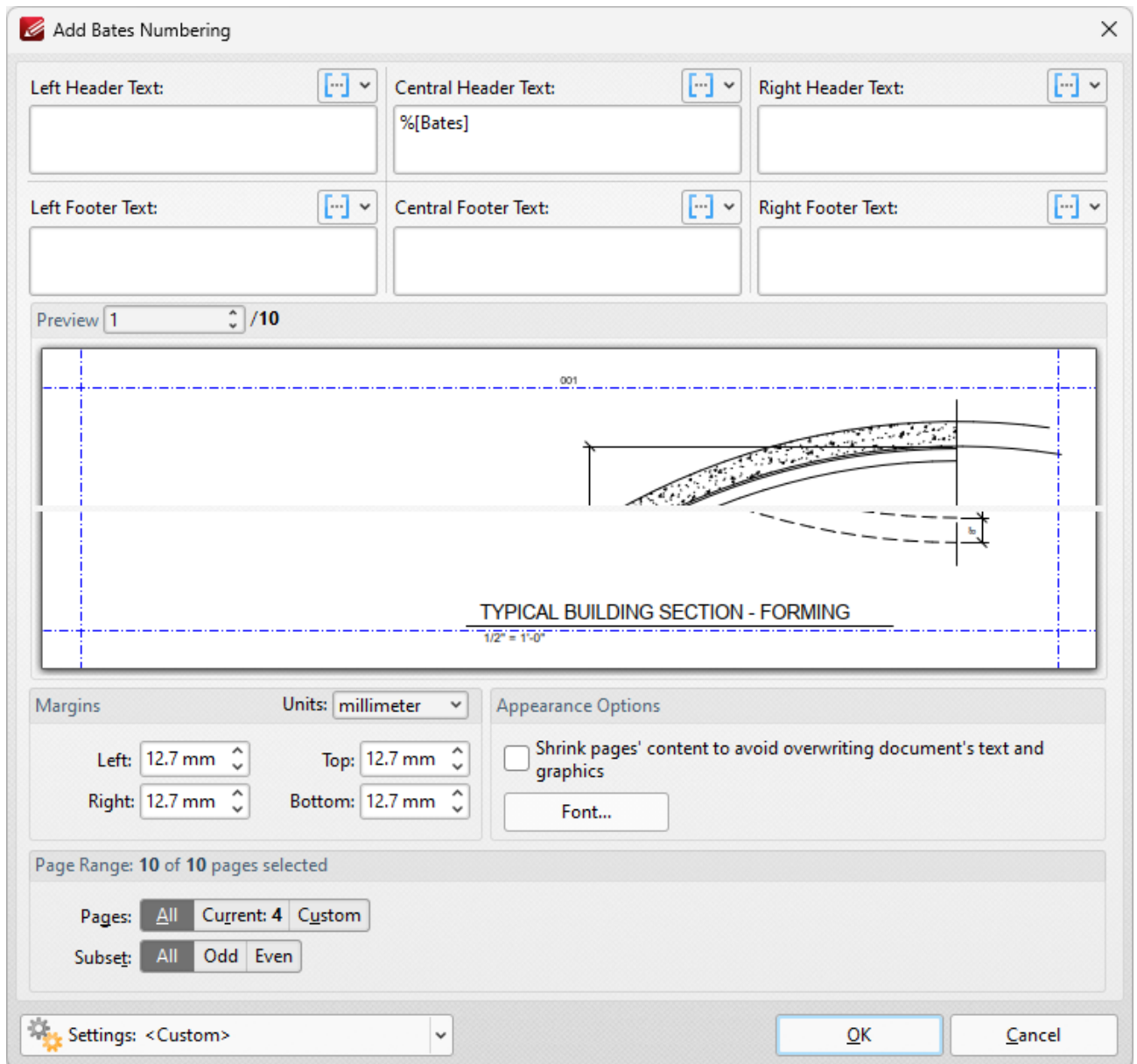
Figure 2. Add Bates Numbering Dialog Box

- Enter text in the text boxes to insert Bates numbering on the left/center/right and as a header/footer of pages as desired. Alternatively, click the macro icon to source the content of Bates numbering with macros. Further information about macros is available **here.** [1157]

- Click **Font** to determine the font settings for Bates numbering, as detailed **here.** 146
- Use the **Margins** settings to reposition the location of Bates numbering.
- Select the **Shrink pages' content to avoid overwriting document's text and graphics** box to shrink page content in order to ensure Bates numbering does not overlap with existing page content when it is added to the document.
- Enter page numbers in the **Preview Page** number box to view a preview of Bates numbering in the preview window.
- The **Page Range** options are as follows:
    - Select **All** to add Bates numbering to all pages.
    - Select **Current** to add Bates numbering to only the current page.
    - Select **Custom** to add Bates numbering to a custom page range. Further information on creating custom page ranges is available **here.** 1274
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Use the **Settings** dropdown menu to save/delete customized settings and/or manage existing customized settings:

    - Click ⊞ to save settings.
    - Click 🗑 to remove settings.
    - Click ⚙ to manage settings.

Click **OK** to create Bates numbering.

Add to Multiple Files

Click **Add to Multiple Files** to add continuous Bates numbering to multiple files. The following dialog box will open:
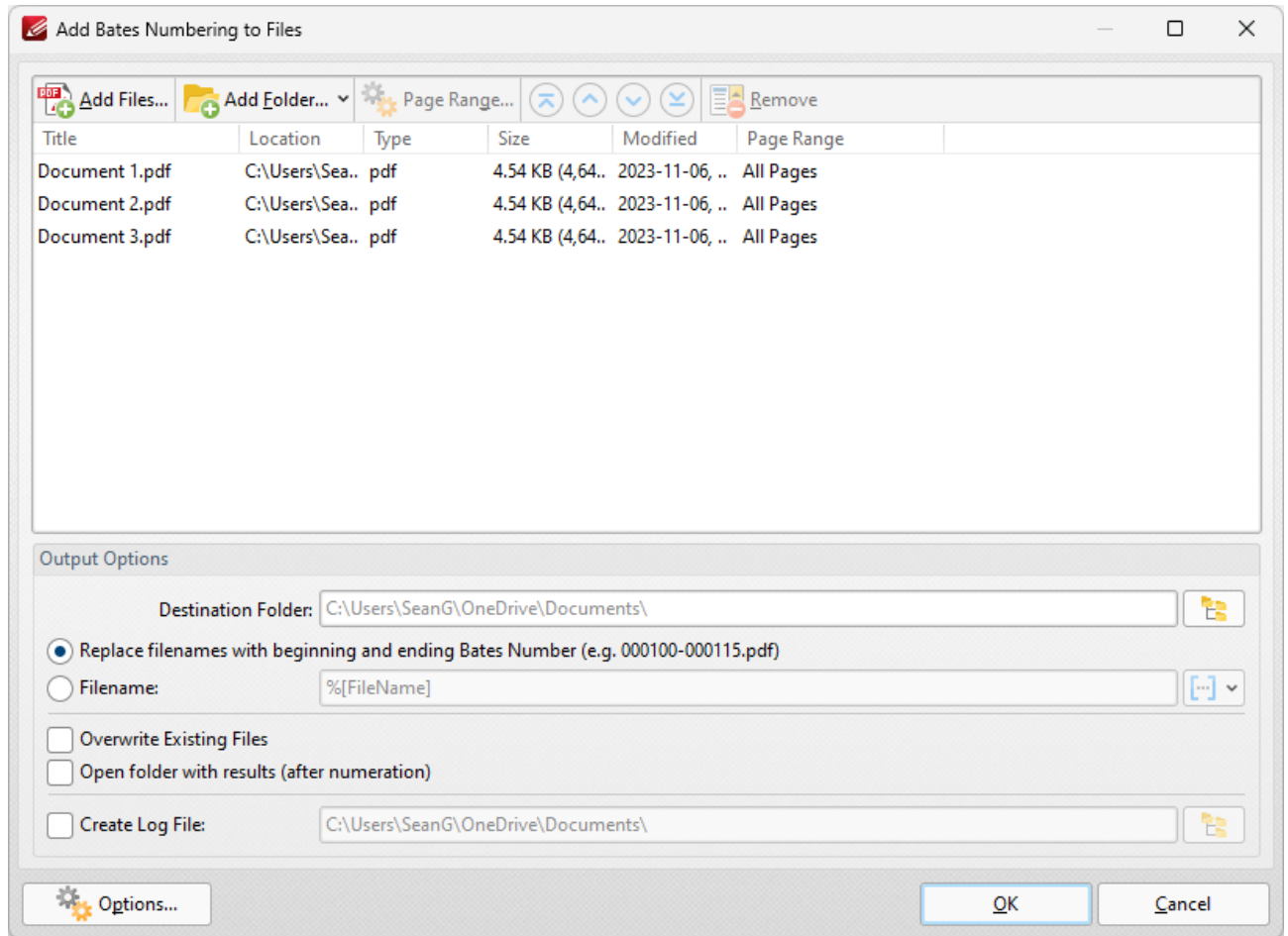
Figure 3. Add Bates Numbering to Files Dialog Box

- Click **Add Files** to add files from the local computer to the list of source files.
- Click **Add Folder** to add folders to the list of source files.
- Select files and then click **Page Range** to determine page ranges for Bates numbering.
- Use the blue arrow icons to move selected documents to the top/bottom of the list, or to move them up/down in the order of documents. The order in which documents are listed determines the order of Bates numbering throughout the documents.
- Click **Remove** to remove selected documents from the list.
- Select **Replace file names with starting and ending Bates number** as desired.
- Use the **Output Options** to determine options for output files:
    - Select the upper radio button to convert filenames to Bates numbering.
    - Select the lower radio button to enter a custom name for converted files. Enter the desired name/folder in the text boxes. Click the blue icon to use **macros** [1157] as desired. Use the **Destination Folder** test box, or click the yellow icon, to determine the location of converted files.
    - Select the **Overwrite Existing Files, Open folder with results** and **Create Log File** boxes as desired..
- Click **Options** to determine the Bates numbering options as detailed in *(figure 2)* above.

Click **OK** to insert Bates numbering into the documents.

5.4.5   **Insert Pages**

Insert Pages

Hover over **Insert Pages** to view image insertion options:
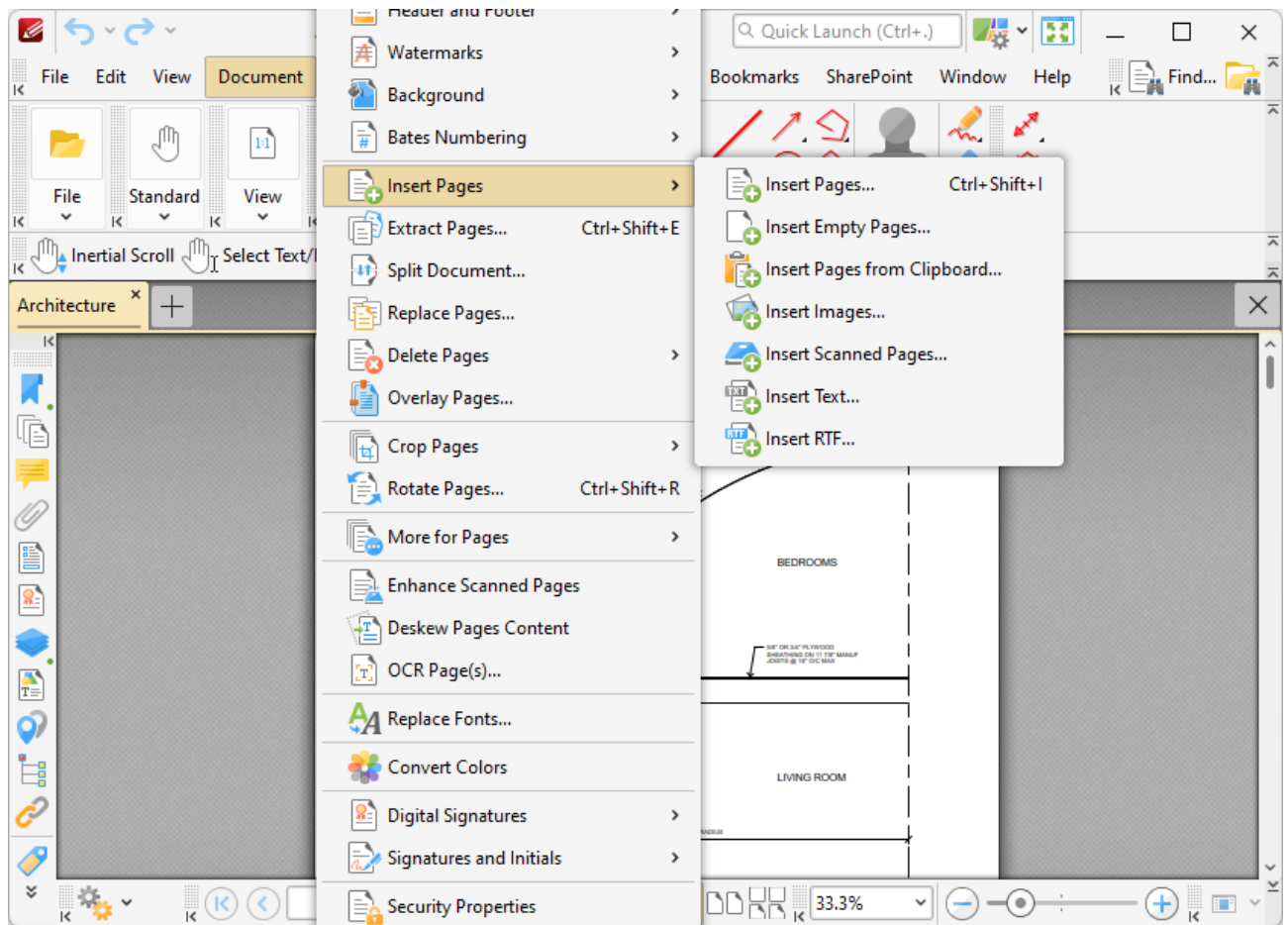
Figure 1. Document Tab Submenu, Insert Pages

Click **Insert Pages** to insert pages into the active document:
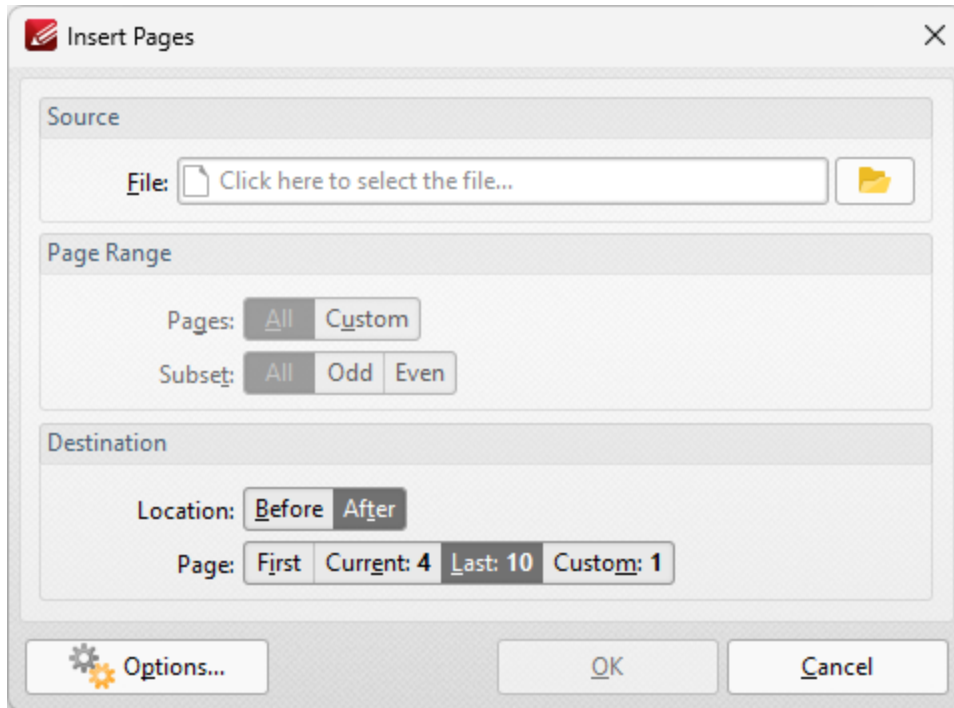
Figure 2. Insert Pages Dialog Box

- Click the **File** text box to specify the document from which to insert pages into the active document.
- Use the **Page Range** options to determine which pages are inserted:
  - Select **All** to insert all pages.
  - Select **Custom** to insert a custom page range. Further information on creating custom page ranges is available **here.** 1274
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Use the **Destination** options to determine the location at which the new pages are inserted.
- Click **Options** to determine additional options for content in inserted pages:
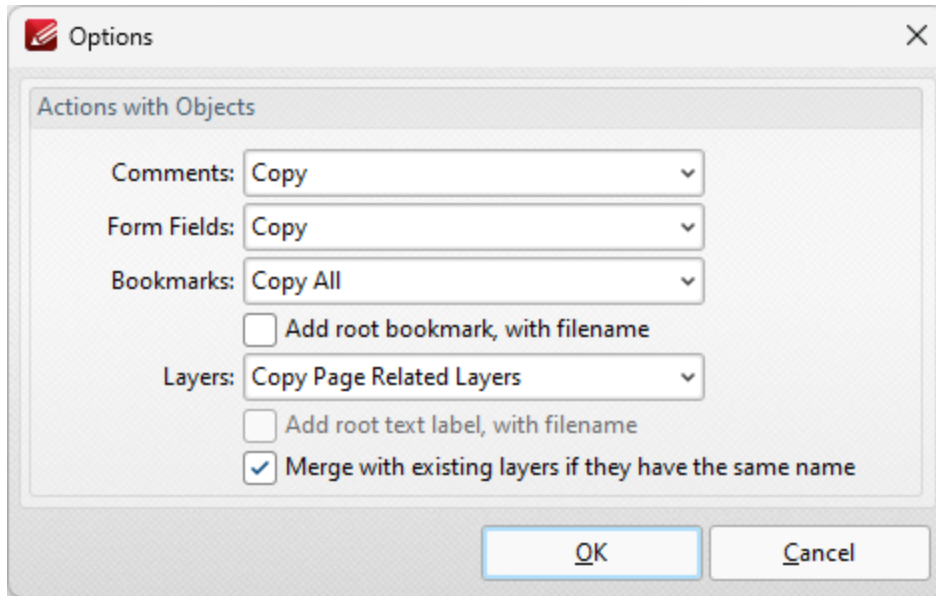
Figure 3. Options Dialog Box

- Use the **Comments** dropdown menu to determine the action taken from comments:
  - Select **Copy** to copy comments.
  - Select **Flatten** to flatten comments.
  - Select **Do Not Copy** to not copy comments.
- Use the **Form Fields** dropdown menu to determine the action taken for form fields:
  - Select **Copy** to copy form fields.
  - Select **Flatten** to flatten form fields.
  - Select **Do Not Copy** to not copy form fields.
  - Select **Copy with Rename** to copy and rename form fields in cases where the names are the same in both documents.
- Use the **Bookmarks** dropdown menu to determine the action taken for bookmarks:
  - Select **Do Not Copy** to not copy bookmarks.
  - Select **Copy All** to copy all bookmarks.
  - Select **Copy Related** to copy only bookmarks that are contained in the pages that are being inserted.
- Select the **Add root bookmark, with file name** box to create a root bookmark from inserted pages.
- Use the **Layers** dropdown menu to determine actions taken for layers in inserted pages:
  - Select **Do Not Copy** to not copy layers when pages are inserted.
  - Select **Copy All** to copy all layers from the source document when pages are inserted.
  - Select **Copy Page Related Layers** to copy only layers that are contained in the pages that are being inserted.
- Select the **Add root text label, with filename** box to add a root text label in the **Layers** pane of the new document, which features the name of the document from which pages were inserted.

- Select the **Merge with existing layers if they have the same name** box to merge layers that have the same name in both documents used for the operation.

Click **OK** to insert pages.

Click **Insert Empty Pages** to insert empty pages into the active document:
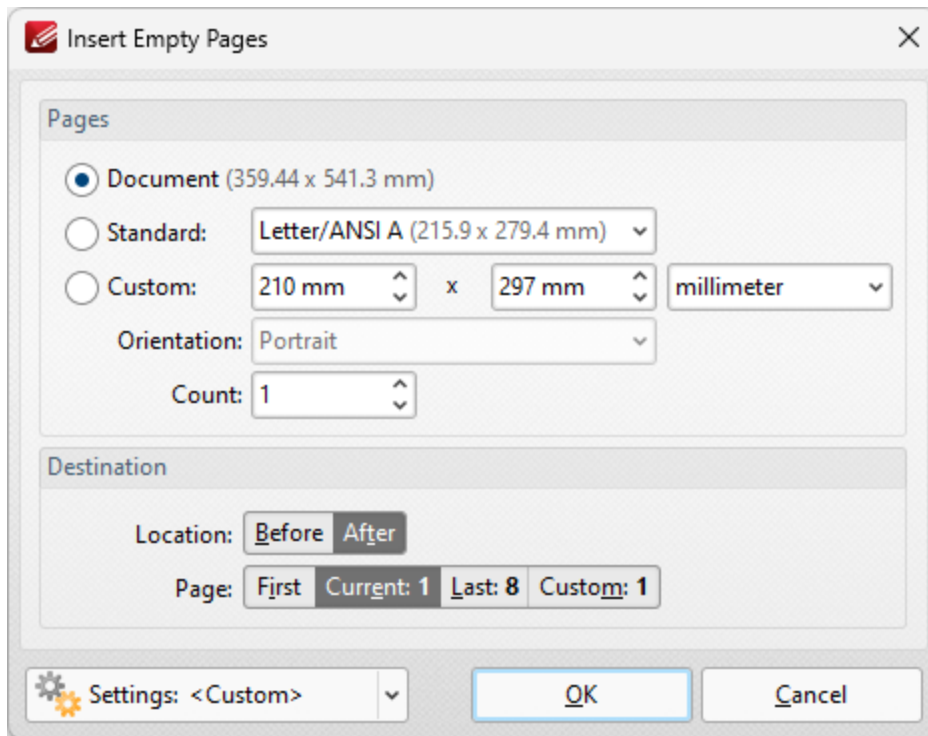
Figure 4. Insert Empty Pages Dialog Box

- Select an option in the **Pages** section to determine the dimensions of new pages:
  - Select **Document** to match the dimensions of the current document.
  - Select **Standard** to select a standard document size, such as those used by the **ISO** and **ANSI.**
  - Select **Custom** to enter custom dimensions. Enter the desired dimensions into the number boxes.
  - Select either **Portrait** or **Landscape** for the orientation of new pages.
  - Use the **Count** menu to determine the number of pages inserted.
- Use the **Destination** options to determine the location at which the new pages are inserted.
- Click **Settings** to view/edit/select preset settings for this feature.

Click **OK** to insert empty pages.

Click **Insert Pages from Clipboard** to insert pages from the clipboard on your machine:

Figure 5. Insert Pages from Clipboard Dialog Box

The current clipboard content on your machine is detailed in the dialog box. Select the content that you want to insert as a page, then use the **Location** and **Page** options to specify the location at which you want to insert the pages and click **OK** to perform the operation. Click **Options** for additional insertion options. Note that the options available depend on the type of content that you are inserting into the document.

Click **Insert Images** to insert images into the active document:
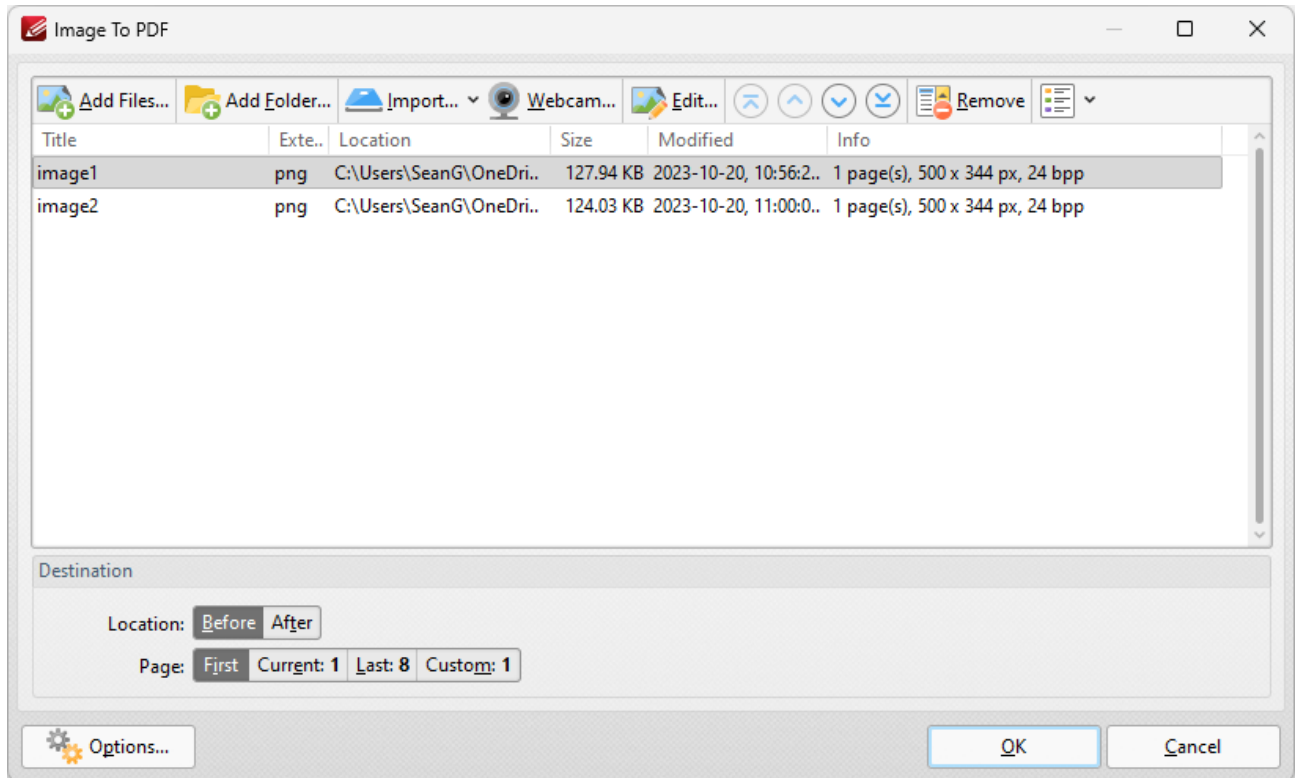
Figure 6. Images to PDF Dialog Box

- Click **Add Files** to add images to the list of source files.
- Click **Add Folder** to add folders of images to the list of source files.
- Click **Import** to add images from the local scanner. See **here**|152| for further details.
- Click **Edit** to edit selected images before insertion.
- Use the blue arrow icons to reorder images. The order of images in the **Image to PDF** dialog box determines the order in which images are inserted into the active document.
- Click **Remove** to remove selected images.
- Use the **Change View Mode** button to select **Details, Icons** or **Thumbnails** as the display mode of list items.
- Use **Destination** options to determine at which images are inserted.
- Click **Options** to determine the options for inserted images. See **here**|141| for further details.

Click **OK** to insert images.

Click **Insert Scanned Pages** to insert scanned pages into the active document:
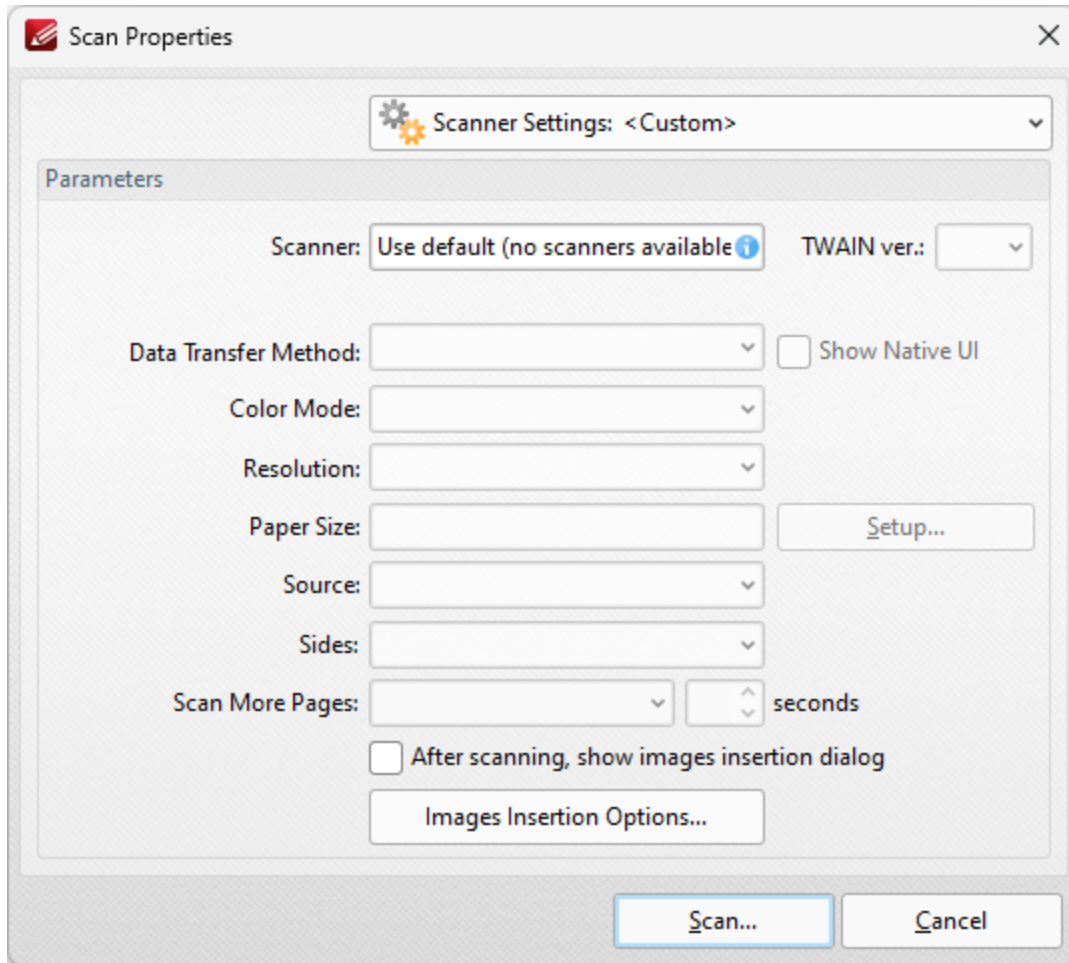
Figure 7. Scan Properties Dialog Box

- Click the **Scanner Settings** menu to select a preset scanning mode.
- Click the **Scanner** menu to select a scanner.
- Use the **TWAIN** dropdown menu to specify the **TWAIN** version in use.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode:**
  - **Native Mode** uses a single memory buffer. This is the default and fastest mode, and is compatible with the broadest range of scanners.
  - **Memory Mode** enables the use of multiple memory buffers. This is a useful function in cases where memory is low and/or when large images are scanned.
- The **Show Native UI** box is selected by default, which means the user interface of the device driver is used. This is the most reliable option, and the scanner will select certain parameters of the scan itself: **Color Mode, Resolution, Paper Size** and **Source.** Clear the **Show Native UI** box to customize these options:
  - **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:

- **Automatic** set the paper size automatically.
- **Standard** contains standard sizes such as those used by the **ISO** and **ANSI**.
- **Custom** can be used to enter custom dimensions.
- **Source** has three options **Auto, Flatbed and Feeder**. These refer to the type of scanner used.
- Click **Sides** to determine which sides of documents are scanned. There are three options: **Simple Scan, Manual Duplex** and **Manual Duplex Reversed.** Click the dropdown arrow for an explanation of these options.
- Click **Scan More Pages** to determine when additional pages are scanned.
- Select the **After scanning, show images insertion dialog** box to view the images insertion dialog box after the scan has been performed. This enables the customization of images and image settings.
- Click **Images Insertion Options** to determine further options for images. These options are detailed **here.** 141
- Please note that the **Save Current Settings** option in the **Scanner Settings** dropdown menu can be used to save customized settings.

Click **Scan** to scan images.

Click **Insert Text** to insert text files into the active document:
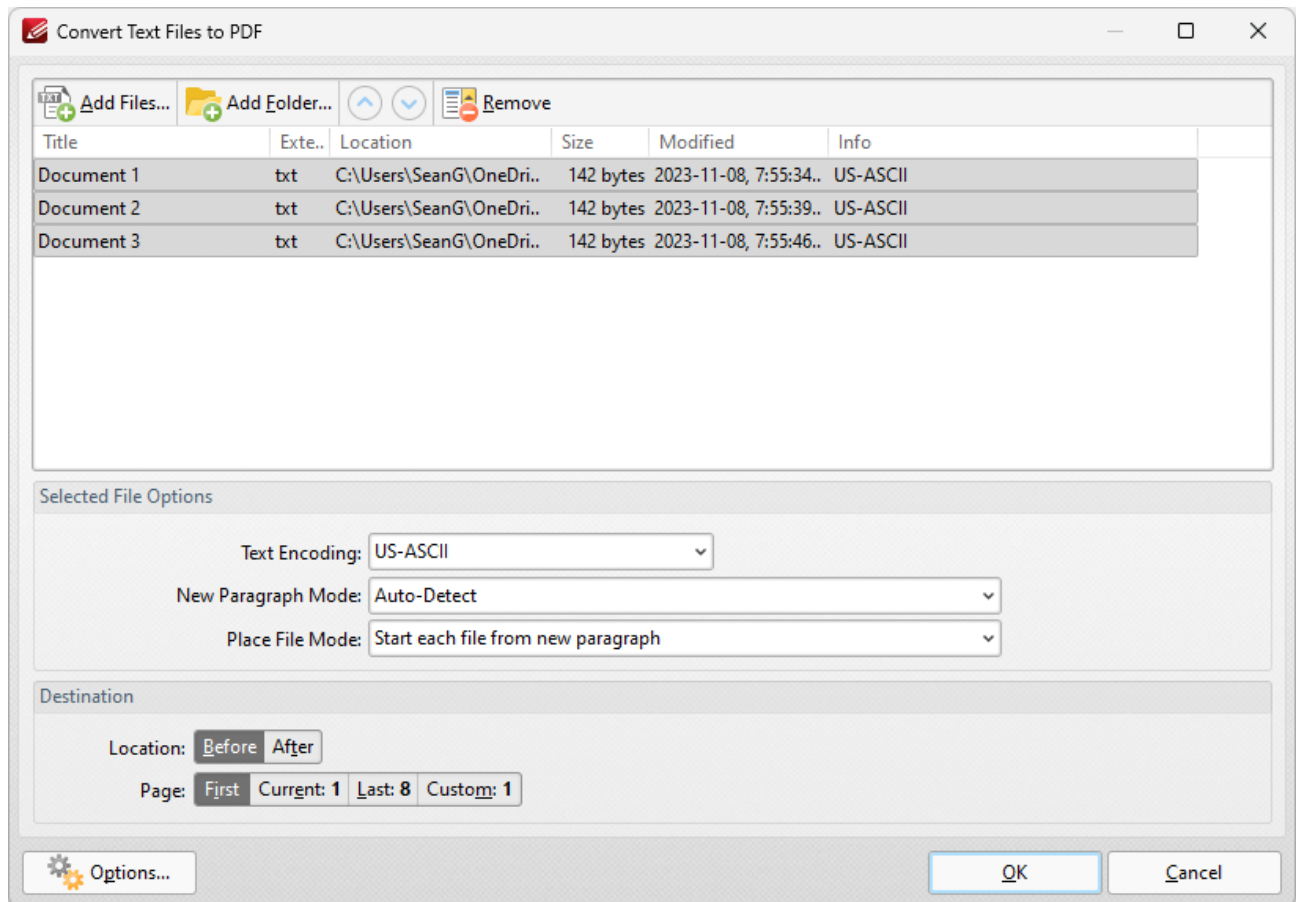
Figure 8. Convert Text Files to PDF Dialog Box

- Click **Add Files** to add text files to the list of source files.
- Click **Add Folder** to add all text files from a folder to the list of source files.
- Use the blue arrows to reorder files. The order of files in the list determines the order in which they are added to the document.
- Click **Remove** to remove selected files.
- Select files to enable the **Selected File Options:**
  - **Text Encoding** determines character encoding of text.
  - **New Paragraph Mode** determines how **PDF-XChange Editor** defines paragraphs in inserted text:
    - **Auto-Detect** searches for and identifies paragraphs automatically.
    - **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 characters start a new paragraph, single is ignored.**
    - **A double newline character starts a new paragraph, a single is converted to a space.**
  - **Place File Mode** determines how files are placed:
    - **Start each file from new paragraph** places each file in a new paragraph, and files can share the same page.
    - **Start each file from new page** places each file in a new page.

- Use the **Destination** options to determine the location at which scanned pages are inserted.
- Click **Options** to determine the options for inserted text files, as detailed **here.** [121]

Click **OK** to insert text files.

Click **Insert RTF** to insert RTF files into documents:
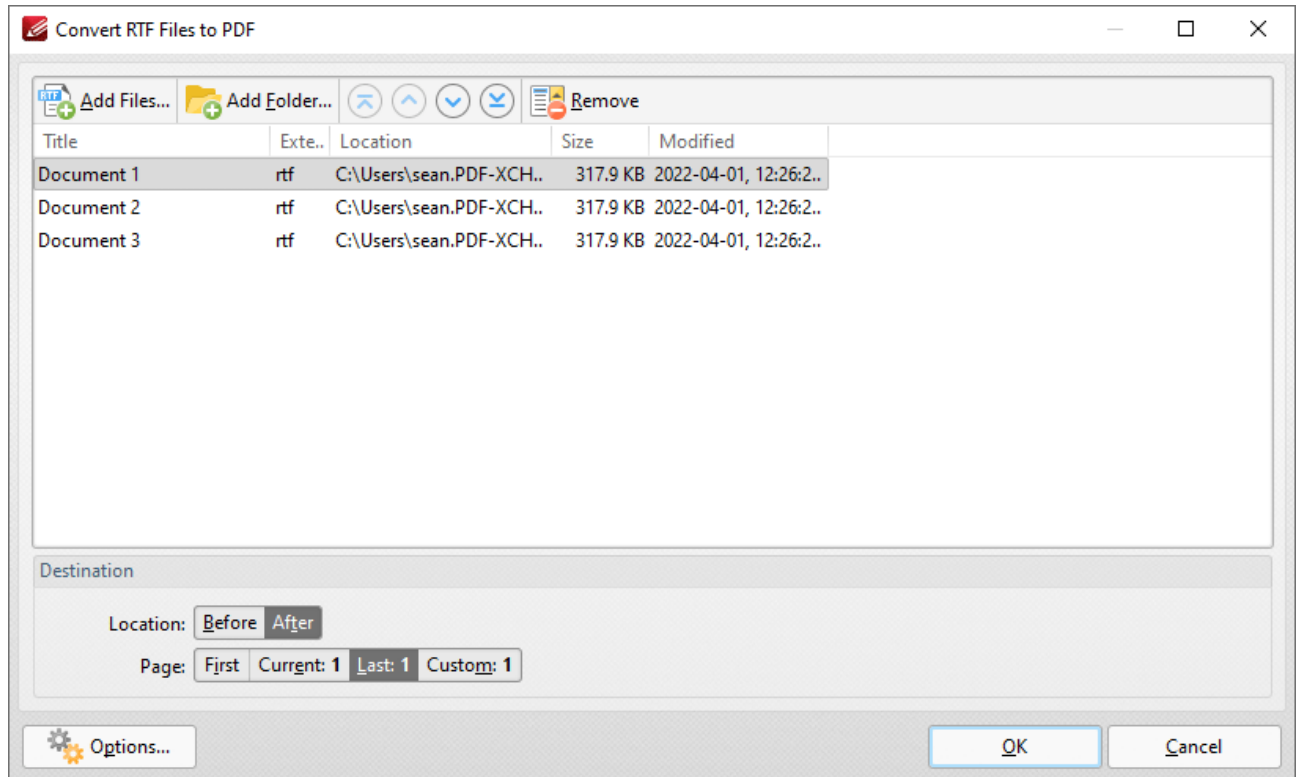
Figure 9. Convert RTF Files to PDF Dialog Box

- Click **Add Files** to add RTF files to the list of source files.
- Click **Add Folder** to add all RTF files from a folder to the list of source files.
- Use the blue arrows to reorder files. The order of files in the list determines the order in which they are added to the document.
- Click **Remove** to remove selected files.
- Use the **Destination** options to determine the location at which files are inserted.
- Click **Options** to determine the relative path and bookmark options for inserted files.

Click **OK** to insert files.

5.4.6 **Extract Pages**

![PDF-XChange Editor icon]**Extract Pages**

Click **Extract Pages** to extract document pages:
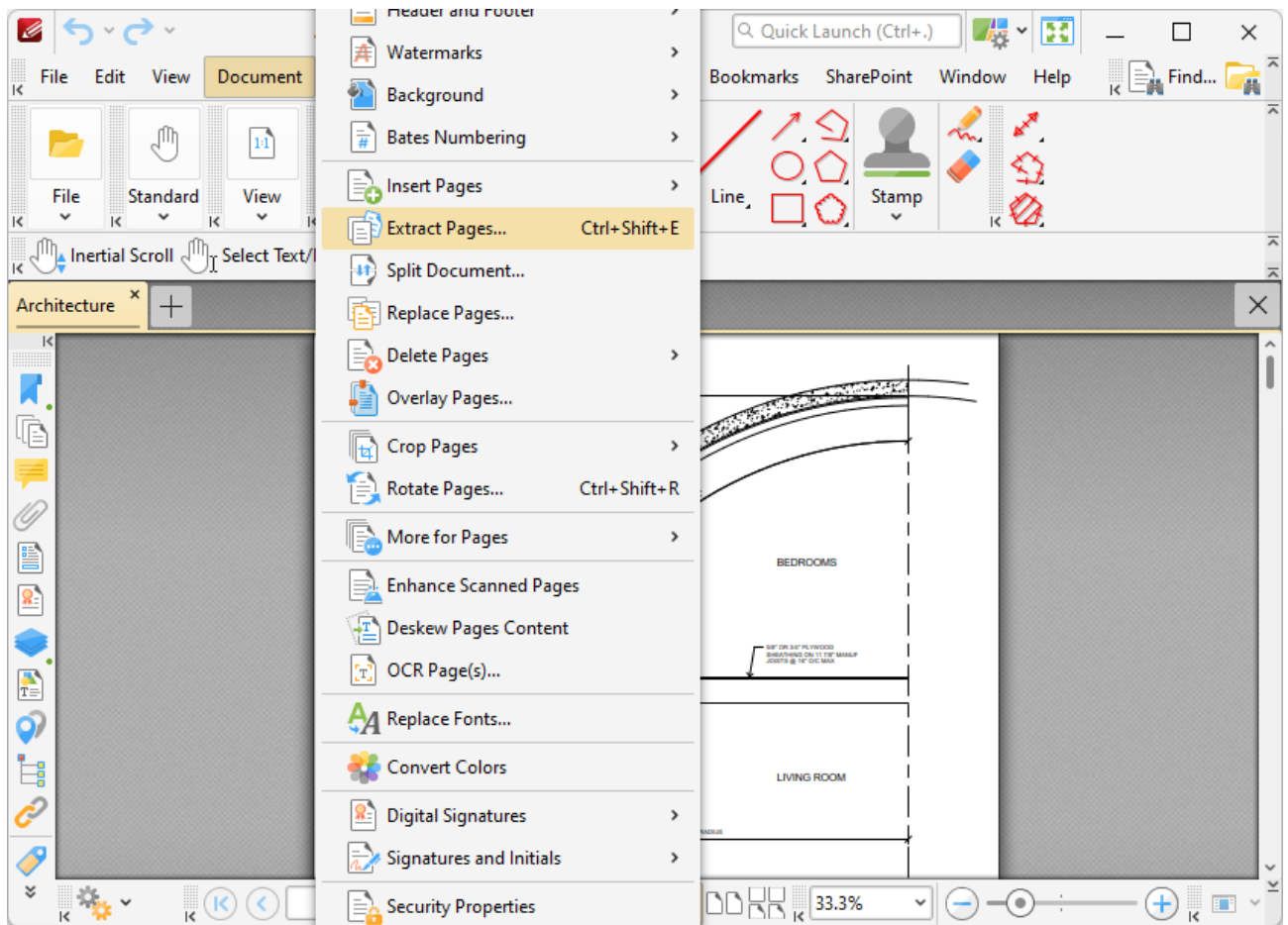
Figure 1. Document Tab Submenu, Extract Pages

The **Extract Pages** dialog box will open:
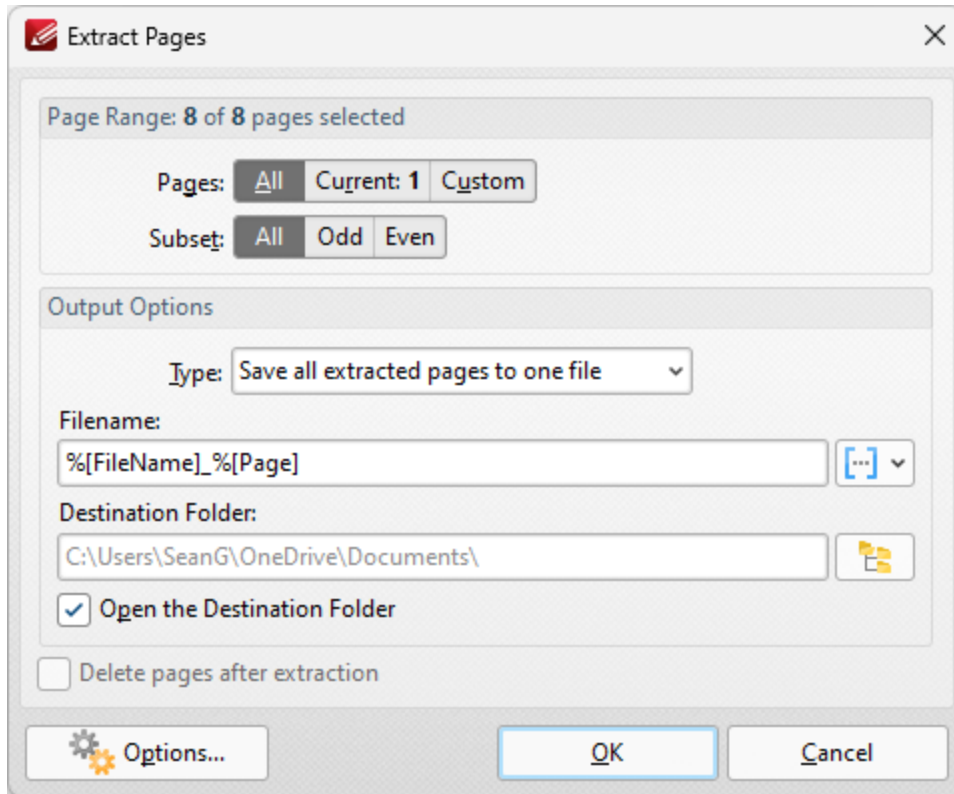
Figure 2. Extract Pages Dialog Box

- Use the **Page Range** settings to determine the page range of extracted pages:
- The **Page Range** options are as follows:
  - Select **All** to extract all pages.
  - Select **Current** to extract only the current page.
  - Select **Custom** to extract a custom page range. Further information on creating custom page ranges is available **here.** [1274]
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Use the **Output Options** to determine output options for extracted pages:
  - Use the **Type** dropdown menu to determine the grouping of extracted pages. The options are:
    - **Extract all pages to a new document.**
    - **Save all extracted pages to one file.**
    - **Save each page to a separate file.**
    - **Save each pages range to a separate file.**
  - Use the **Filename** text box to set a file name for extracted pages. Click the blue icon to use **macros.** [1157]
  - Use the **Destination Folder** text box to set the destination folder, or click the yellow icon to select a folder.
  - Select the **Open the Destination Folder** box to open the destination folder when the operation is complete.

- Select the **Delete pages after extraction** box to delete pages from the source document after they are extracted.
- Click **Options** to determine the action taken for **Comments, Form Fields, Bookmarks** and **Layers** in extracted pages:

Figure 3. Options Dialog Box

- Use the **Comments** dropdown menu to determine the action taken from comments:
  - Select **Copy** to copy comments.
  - Select **Flatten** to flatten comments.
  - Select **Do Not Copy** to not copy comments.
- Use the **Form Fields** dropdown menu to determine the action taken for form fields:
  - Select **Copy** to copy form fields.
  - Select **Flatten** to flatten form fields.
  - Select **Do Not Copy** to not copy form fields.
- Use the **Bookmarks** dropdown menu to determine the action taken for bookmarks:
  - Select **Do Not Copy** to not copy bookmarks.
  - Select **Copy All** to copy all bookmarks.
  - Select **Copy Related** to copy only bookmarks that are contained in the pages that are being extracted.
- Use the **Layers** dropdown menu to determine actions taken for layers in extracted pages:
  - Select **Do Not Copy** to not copy layers when pages are extracted.
  - Select **Copy All** to copy all layers from the source document when pages are extracted.
  - Select **Copy Page Related Layers** to copy only layers that are contained in the pages that are being extracted.

Click **OK** to extract pages.

The keyboard shortcut for this feature is Ctrl+Shift+E.

5.4.7   Split Document

Split Document

Click **Split Document** to split documents:
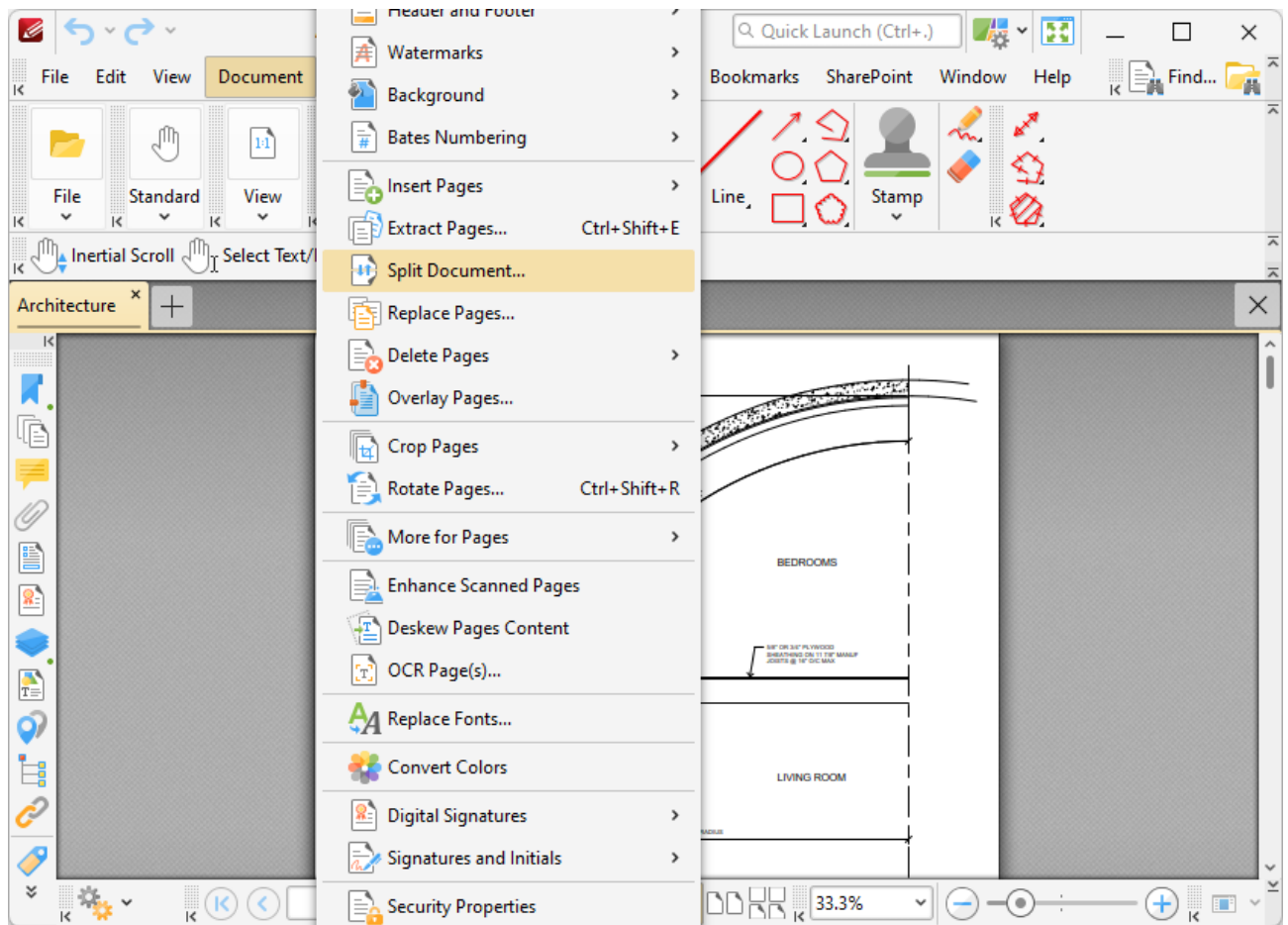
Figure 1. Document Tab Submenu, Split Document

The **Split Document** feature is useful for the breaking down of one document into several smaller documents, such as books into chapters:
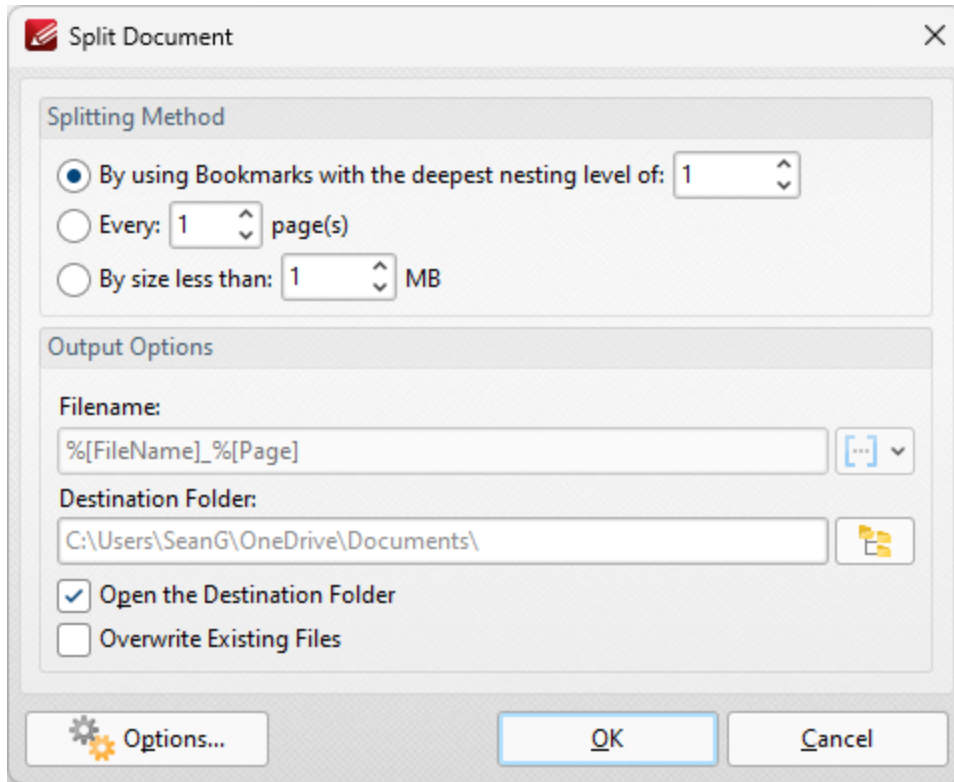
Figure 2. Split Document Dialog Box

- Select a **Splitting Method** to determine how the document is split:
  - Select **By using Bookmarks with the deepest nesting level of** to split documents according to its deepest nesting-level of bookmarks.
  - Select **Every 'n' pages** to split the document every *n* pages. For example, enter the value '3' to place a split after every third page.
  - Select **By Size less then** to split documents into smaller documents that have a maximum size of that specified in the number box.
- Use the **Output Options** to determine how split documents are saved:
  - Enter the filename in the **Filename** text box. Click the blue icon to use **macros.** 1157
  - Enter the name of the desired folder in the **Destination Folder** text box, or click the icon to select a folder.
  - Select the **Open the Destination Folder** box to open the destination folder when the process is complete.
  - Select the **Overwrite Existing Files** box to overwrite existing files that have the same name as those being saved. This is a useful feature when documents need to be split multiple times.
- Click **Options** to determine the action taken for **Comments, Form Fields, Bookmarks** and **Layers** in split documents:

Figure 3. Options Dialog Box

- Use the **Comments** dropdown menu to determine the action taken from comments:
  - Select **Copy** to copy comments.
  - Select **Flatten** to flatten comments.
  - Select **Do Not Copy** to not copy comments.
- Use the **Form Fields** dropdown menu to determine the action taken for form fields:
  - Select **Copy** to copy form fields.
  - Select **Flatten** to flatten form fields.
  - Select **Do Not Copy** to not copy form fields.
- Use the **Bookmarks** dropdown menu to determine the action taken for bookmarks:
  - Select **Do Not Copy** to not copy bookmarks.
  - Select **Copy All** to copy all bookmarks.
  - Select **Copy Related** to copy only bookmarks that are contained in the pages that are being split.
- Use the **Layers** dropdown menu to determine actions taken for layers in split documents:
  - Select **Do Not Copy** to not copy layers when documents are split.
  - Select **Copy All** to copy all layers when documents are split.
  - Select **Copy Page Related Layers** to copy only layers that are contained in the pages that are being split.

Click **OK** to split documents.

5.4.8   **Replace Pages**

Replace Pages

Click **Replace Pages** to replace document pages with pages from other documents:
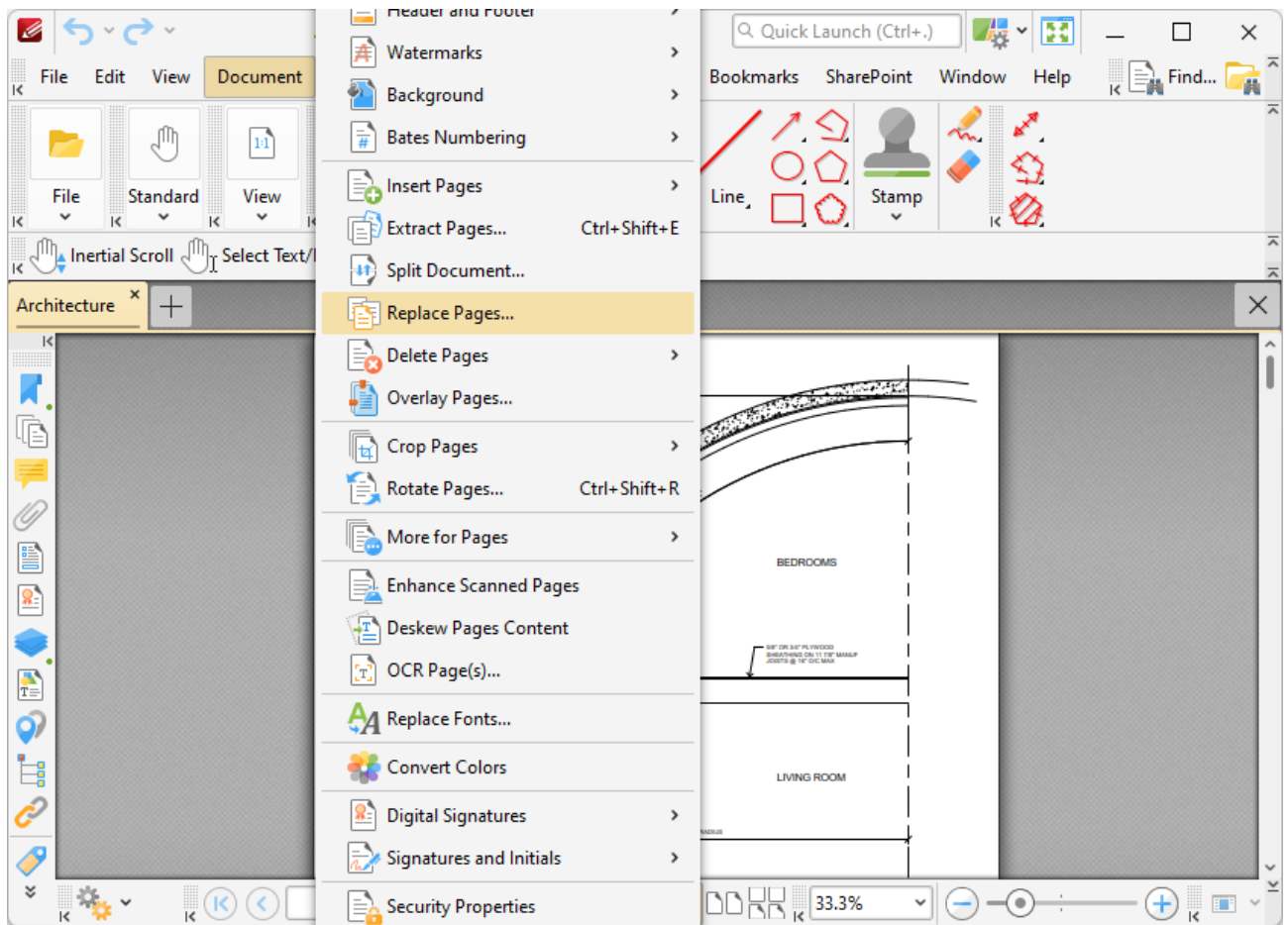
Figure 1. Document Tab Submenu, Replace Pages

The following dialog box will open:

Figure 2. Replace Pages Dialog Box

- Use the **Page Range** settings to determine the page range of replaced pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
  - Select the box to retain interactive features such as comments and form fields on the places being replaced.

Use the **New Pages from File** settings to determine options for the replacement pages:

- Use the **File** box to specify the file to be used to replace document pages.
- Use the **Page Range** settings to determine the page range used from the source document:
  - Select **All** to specify all pages.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **Options** for additional options:

Figure 3. Options Dialog Box

- Use the **Comments** dropdown menu to determine the action taken from comments:
  - Select **Copy** to copy comments.
  - Select **Flatten** to flatten comments.
  - Select **Do Not Copy** to not copy comments.
- Use the **Form Fields** dropdown menu to determine the action taken for form fields:
  - Select **Copy** to copy form fields.
  - Select **Flatten** to flatten form fields.
  - Select **Do Not Copy** to not copy form fields.
- Use the **Bookmarks** dropdown menu to determine the action taken for bookmarks:
  - Select **Do Not Copy** to not copy bookmarks.
  - Select **Copy All** to copy all bookmarks.
  - Select **Copy Related** to copy only bookmarks that are contained in the pages that are used for the replacement.
- Use the **Layers** dropdown menu to determine actions taken for layers in pages that are used for the replacement:
  - Select **Do Not Copy** to not copy layers when documents are replaced.
  - Select **Copy All** to copy all layers when documents are replaced.
  - Select **Copy Page Related Layers** to copy only layers that are contained in the pages used for the replacement.
- Select the box to merge layers with existing layers in cases where both sets of layers have the same name.

Click **OK** to replace pages.

5.4.9 **Delete Pages**

Delete Pages

Hover over **Delete Pages** to view the **Delete Pages** submenu:
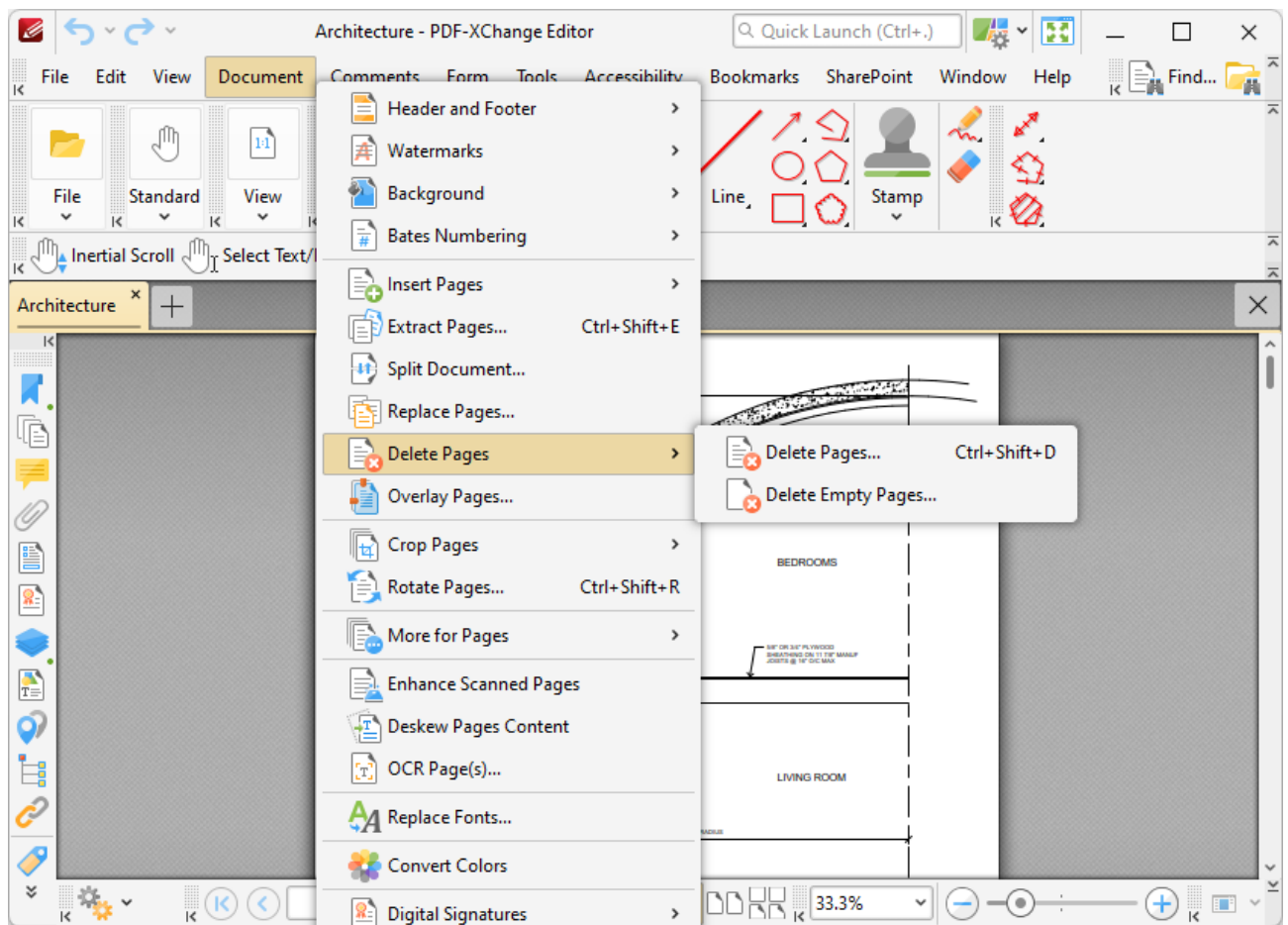
Figure 1. Document Tab Submenu, Delete Pages

Click **Delete Pages** to delete document pages:
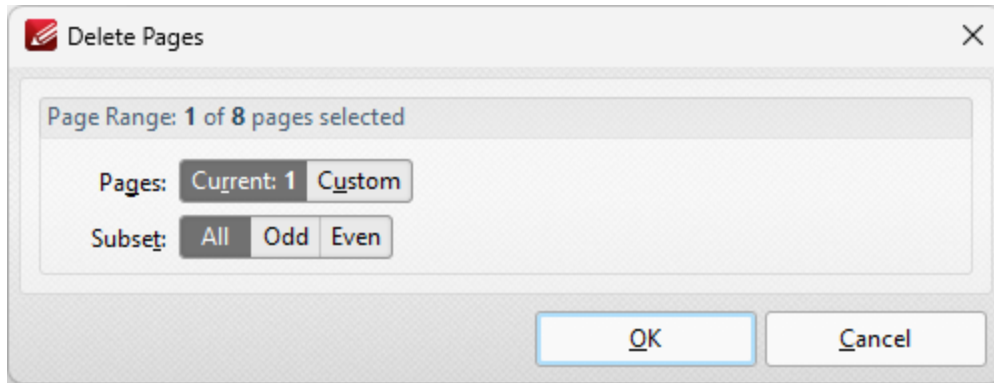
Figure 2. Delete Pages Dialog Box

- The **Page Range** options are as follows:
  - Select **Current** to delete only the current page.
  - Select **Custom** to delete a custom page range. Further information on creating custom page ranges is available **here.** [1274]
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**

Click **OK** to delete the pages.

Click **Delete Empty Pages** to delete empty document pages:
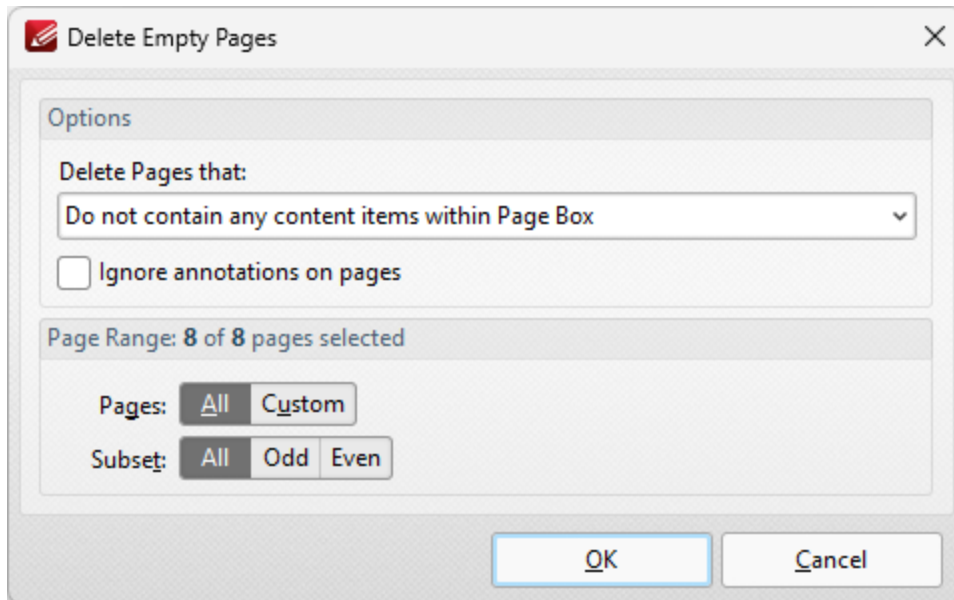
Figure 3. Delete Empty Pages Dialog Box

- Use the **Delete pages that:** dropdown menu to specify the deletion of specific types of pages:
  - Select **Do no contain any content items within Page Box** to delete only pages that do not contain content items in the page box of the document. The

page box is defined as the intersection between the crop box and the media box, as detailed **here.** `1271`

- Select **Do not contain any content items** to delete only pages that do not contain content items.
- Select **Have only a solid background** to delete pages that contain only a solid background.
- Select the **Ignore annotations on pages** dialog box to include pages that contain only annotations in the deletion process.
- The **Page Range** options are as follows:
    - Select **All** to delete all pages.
    - Select **Custom** to delete a custom page range. Further information on creating custom page ranges is available **here.** `1274`
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**

Click **OK** to delete the pages.

5.4.10   Overlay Pages

Overlay Pages

Click **Overlay Pages** to overlay document pages:
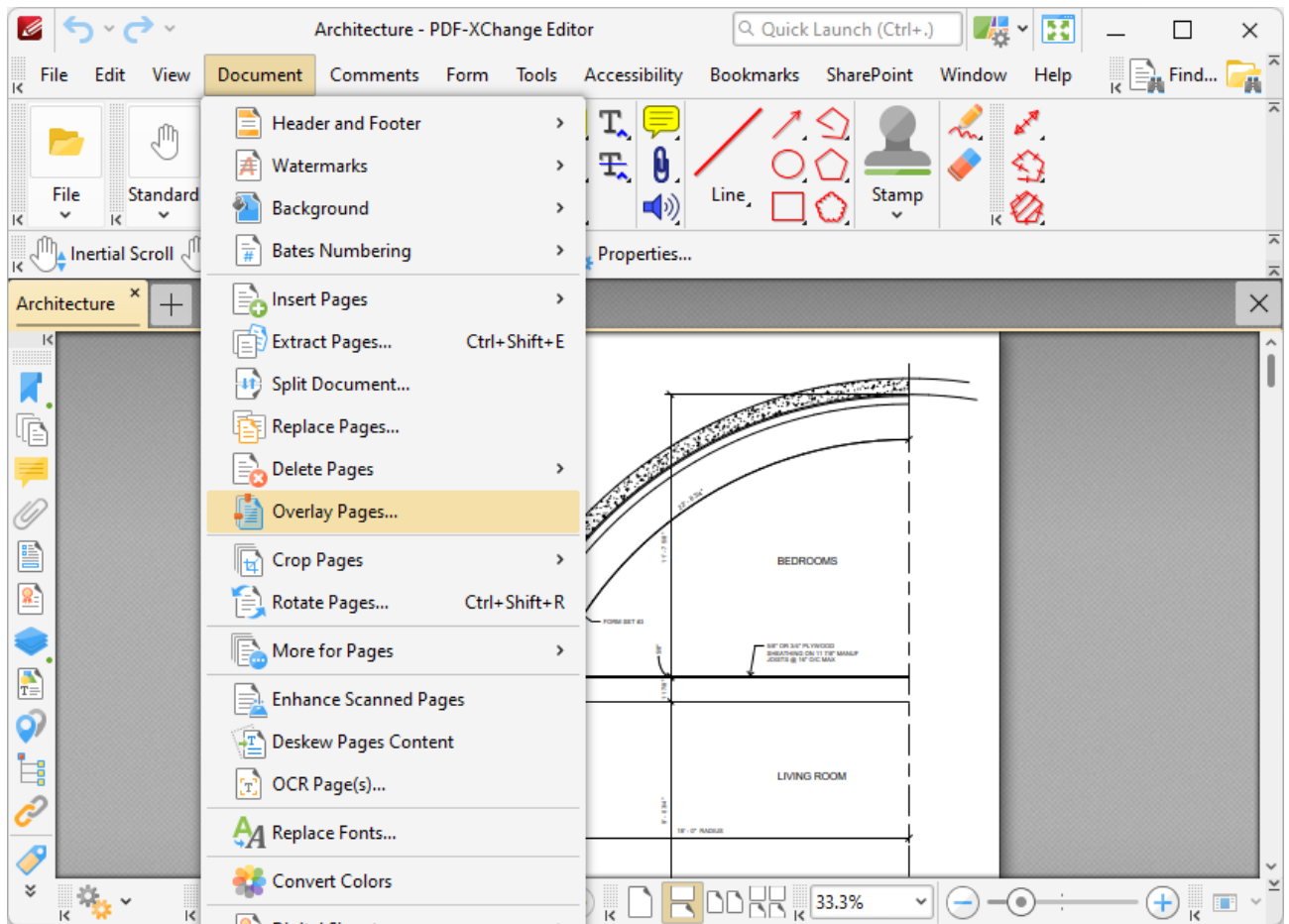
Figure 1. Document Tab Submenu, Overlay Pages

The **Overlay Pages** dialog box will open:
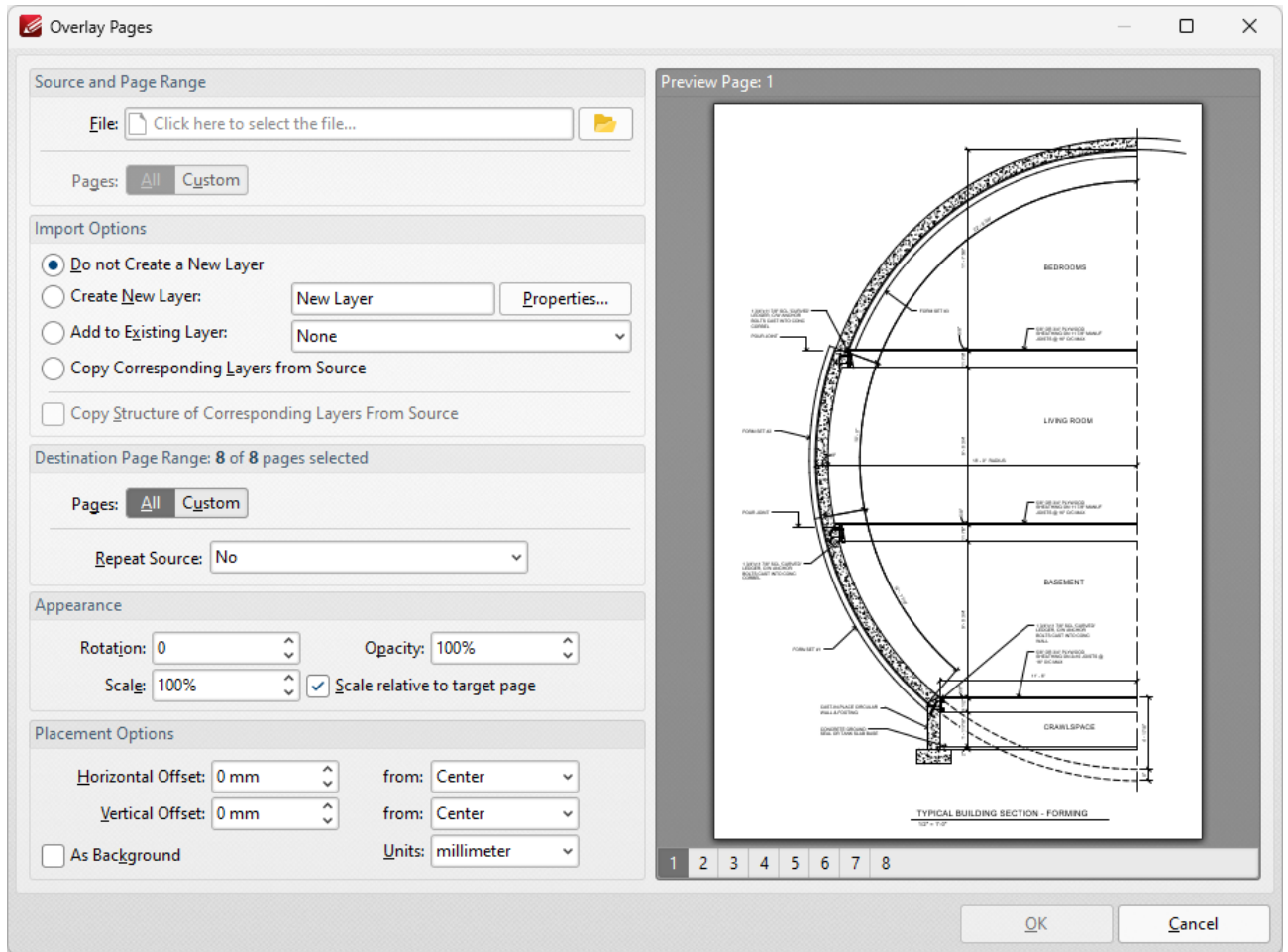
Figure 2. Overlay Pages Dialog Box

- Use the **File** dropdown menu to select a file to use as an overlay on the document.
- Use the **Pages** option to determine the pages used from the source document. Click **All** to use all pages, or **Custom** to specify a custom page range.
- Use the **Import Options** to determine import options for the overlay:
  - Click **Do not Create a New Layer** to not add the overlay as a new layer in the document.
  - Click **Create New Layer** to create a new layer for the overlay. Enter a name for the new layer in the text box and click **Properties** to determine layer properties, as detailed below.
  - Click **Add to Existing Layer** to add the overlay to an existing layer, then selected the desired layer from the dropdown menu.
  - Click **Copy Corresponding Layers from Source** to copy corresponding layers from the overlay document into the current document.
  - Click **Copy Structure of Corresponding Layers From Source** to copy the layer structure from the overlay document into the current document.
- Use the **Destination Page Range** options to determine the page range into which the overlay is imported:

- Use the **Pages** option to determine the pages used from the overlay. Click **All** to use all pages, or **Custom** to specify a custom page range. Further information on creating custom page ranges is available **here.** 1274
- Use the **Repeat Source** dropdown menu to determine repeat options for the overlay in cases where it contains fewer pages than the current document:
  - Select **No** to disable the repeating of the overlay pages from the source document in the current document.
  - Select **Last selected page** to repeat the last selected page of the overlay in the source document.
  - Select **Continuously repeat selected pages** to repeat the overlay pages until they fill the current document.
- Use the **Appearance** options to determine the appearance of the overlay:
  - Select an option in the **Rotation** dropdown menu to determine the rotation of the overlay.
  - Select an option in the **Opacity** dropdown menu to determine the opacity of the overlay.
  - Select an option in the **Scale** dropdown menu to determine the scaling of the overlay.
- Use the **Placement Options** to determine the placement of the overlay:
  - Use the **Horizontal Offset** number box to determine the horizontal offset the overlay. Use the adjacent dropdown to determine the location from which the offset is made.
  - Use the **Vertical Offset** number box to determine the vertical offset of the overlay. Use the adjacent dropdown to determine the location from which the offset is made.
  - Use the **Units** dropdown menu to specify the units of measurement for offsets.
  - Select the **As Background** box to import the overlay as a background.

Click **OK** to overlay the document.
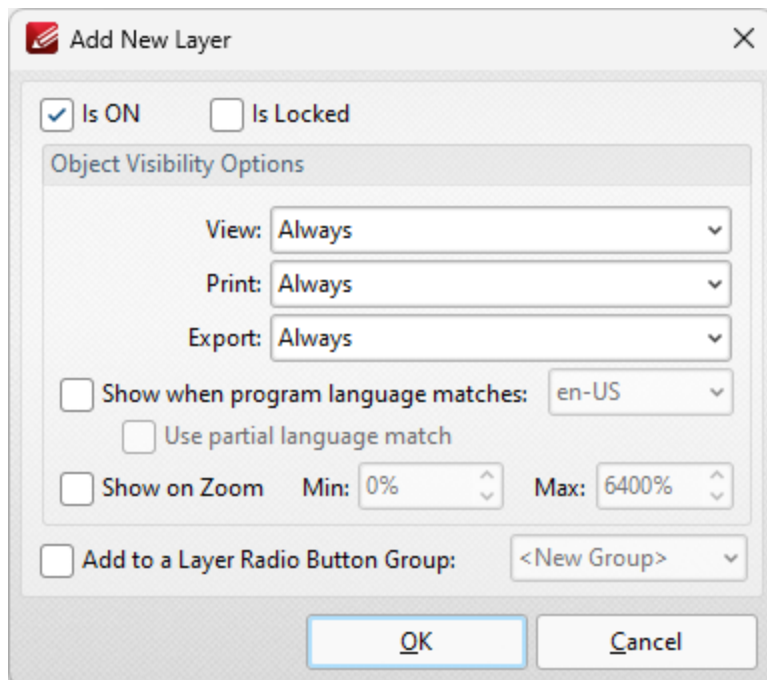
Figure 3. Add New Layer Dialog Box

- Select/clear the **is ON** box to set the default state of the layer to on/off.
- Select/clear the **Is Locked** box to disable/enable subsequent users from changing the state of the layer.
- Use the **Object Visibility Options** dropdown menus to determine the visibility of the layer when the documents that contains it are viewed/printed/exported.
- Select the **Show when system language matches** box to show the layer when the application language matches a given language, then select the desired language in the adjacent dropdown menu.
- Select the **Use partial language match** to display the layer when there is a partial language match with the language specified. A partial language match occurs when the region of the language is the same as in the language specified but the locale is different. For example, if **US English** is specified in the **Show when system language matches** dropdown menu and the **Use partial language match** box is selected, then the layer will be displayed when the application language is identified as **US English, United Kingdom English, South African English** and all other derivatives of English listed in the dropdown menu.
- Select the **Show on Zoom** box to display the layer when the zoom function is used. Use the adjacent number boxes to specify the minimum and maximum levels of zoom at which the layer is displayed.
- Select the **Add to a Layer Radio Button Group** to add the layer to a **Layer Radio Button Group.** Layers contained in a radio button group are mutually exclusive - if one layer is enabled then the rest are disabled.

Click **OK** to save changes.

5.4.11 **Crop Pages**

Crop Pages

Hover over **Crop Pages** to view page-cropping options:
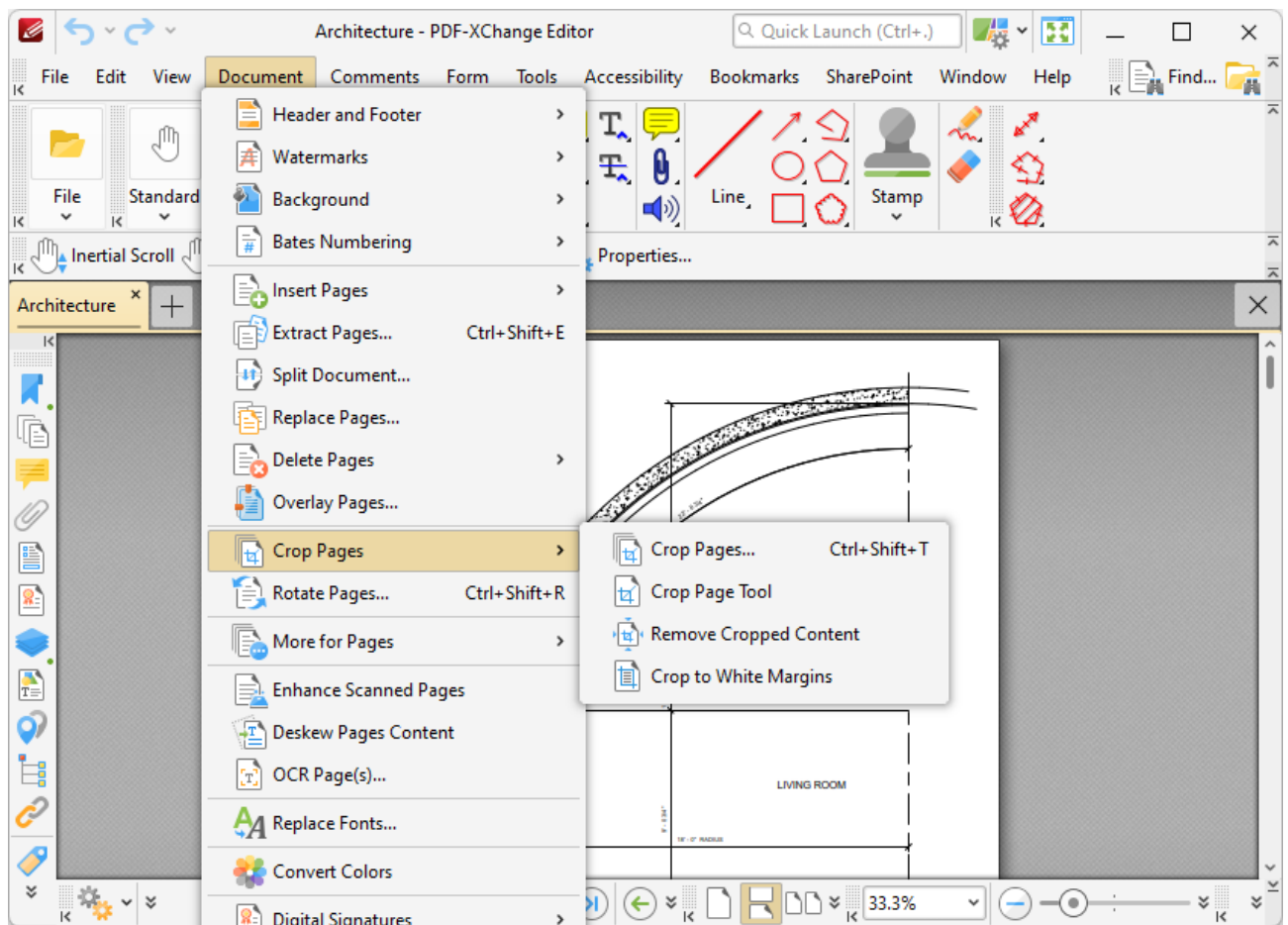
Figure 1. Document Tab Submenu, Crop Pages

Click **Crop Pages** to crop document pages:
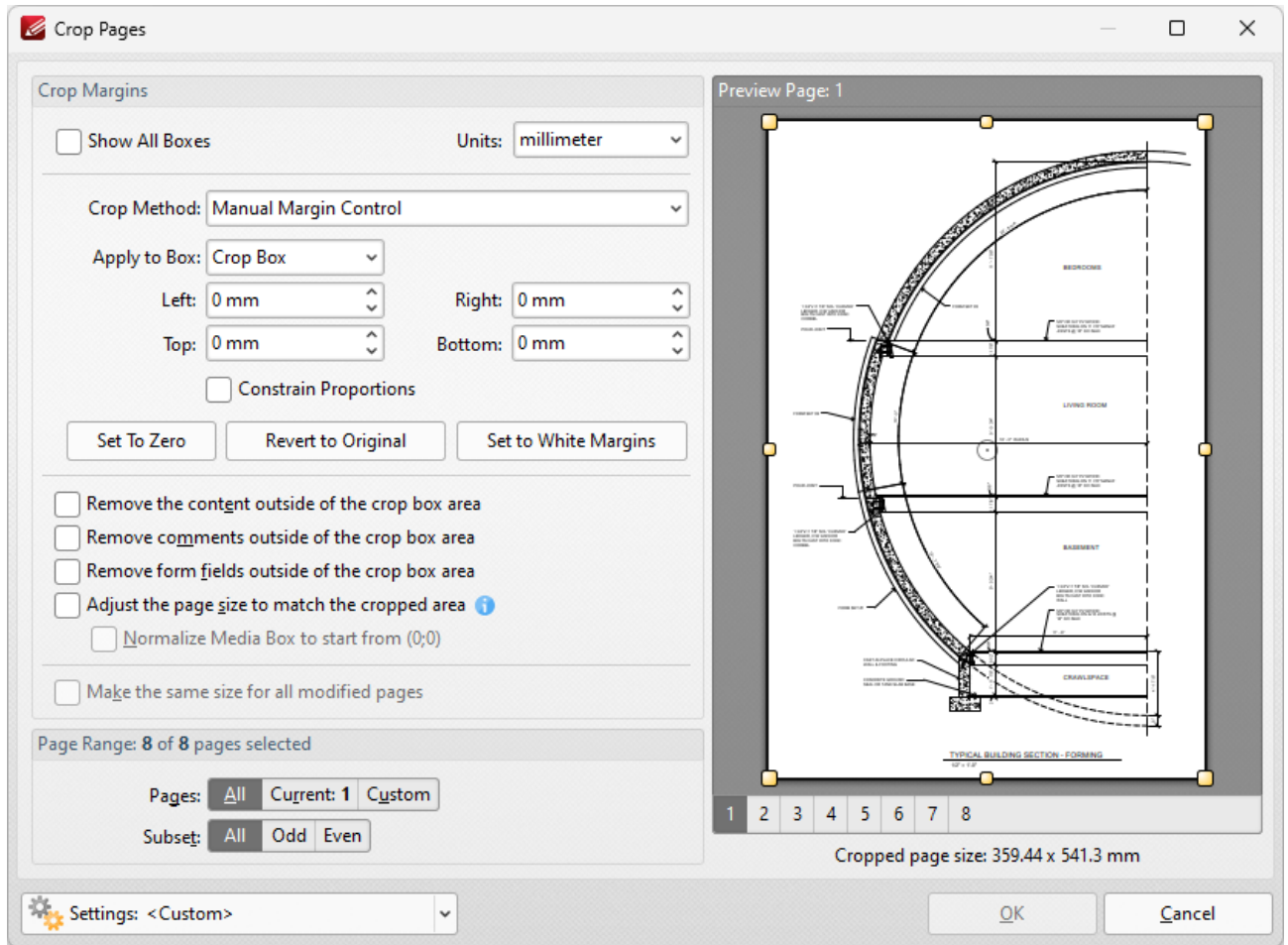
Figure 2. Crop Pages Dialog Box

PDF documents define five boundaries that control the imaging process: the **Crop Box, Bleed Box, Trim Box, Art Box** and **Media Box. PDF-XChange Editor** uses these boxes to determine areas when the **Crop Pages** feature is used. Use the **Apply to Box** dropdown menu, detailed below, to display the editing boxes in the preview pane, then click and drag boxes and/or use the number boxes to adjust their dimensions. Further information about editing boxes is available **here.** 1271 The following options are available in the **Crop Pages** dialog box:

- Click **Show All Boxes** to view the **Crop Box, Bleed Box, Trim Box** and **Art Box** in the preview pane. (Please note that the **Bleed Box, Trim Box** and **Art Box** use the same dimensions as the **Crop Box** by default.
- Use the **Crop Method** dropdown menu to determine the crop method used:
  - **Manual Margin Control** enables the user to determine the cropping margins. Click the text of menu entries in the **Apply to Box** dropdown menu to view them in the preview pane. Click and drag boxes in the preview pane, or use the number boxes, to adjust their dimensions. Select the check boxes of menu entries in the **Apply to Box** dropdown menu to include them in the **Crop Pages** operation.

- **Remove All White Space** is a predefined mode that removes all white space from documents.
- **Remove Horizontal White Space/Remove Vertical White Space** are predefined modes that remove horizontal/vertical white space as required.
- **None** adjusts the page size to the crop box without changing existing crop boxes.
- 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** dropdown menu.
- Select the **Remove the content/comments/form fields outside of the crop box area** box to remove content/comments/form fields outside of the **Crop box**. Please note that cropping pages reduces the visible page content, but the cropped content is still present in the file's underlying code and, for example, will be visible if the document pages are increased in size. Select this option to remove cropped content from the file.
- Select the **Normalize Media Box to start from (0;0)** box to reset the media box coordinates in cases where previous operations have shifted them from the default location.
- Use the **Page Range** settings to determine the page range of cropped pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to crop pages.

Click **Crop Page Tool** to crop documents manually. The **Crop Tool** dialog box will open:
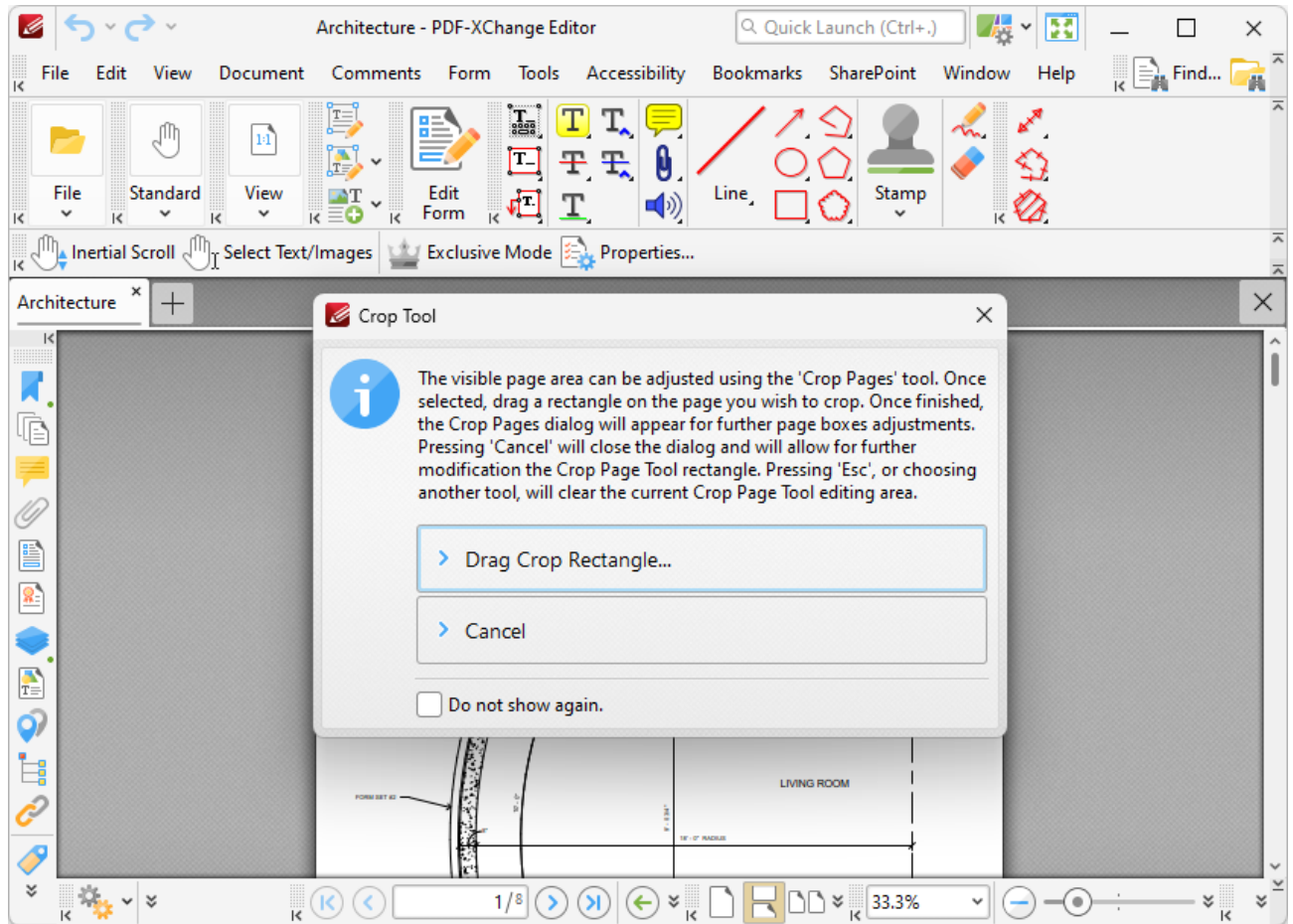
Figure 3. Crop Page Tool, Crop Tool Dialog Box

Click **Drag Crop Rectangle**. The pointer will turn into a crosshairs icon. Click and drag to select the area to be cropped. When the mouse button is released, the dialog box detailed in *(figure 2)* will launch. Configure the parameters as detailed above and then click **OK** to crop documents.

Click **Remove Cropped Content** to remove cropped content from documents. Please note that content is not removed by default. Cropping pages reduces the visible page content, but the content remains available (and takes up memory) unless the **Remove Cropped Content** option is used.

Click **Crop to White Margins** to redefine the visible area of documents to match the bounding box of content on each page.

5.4.12 Rotate Pages

Rotate Pages

Click **Rotate Pages** (or press Ctrl+Shift+R) to rotate document pages:
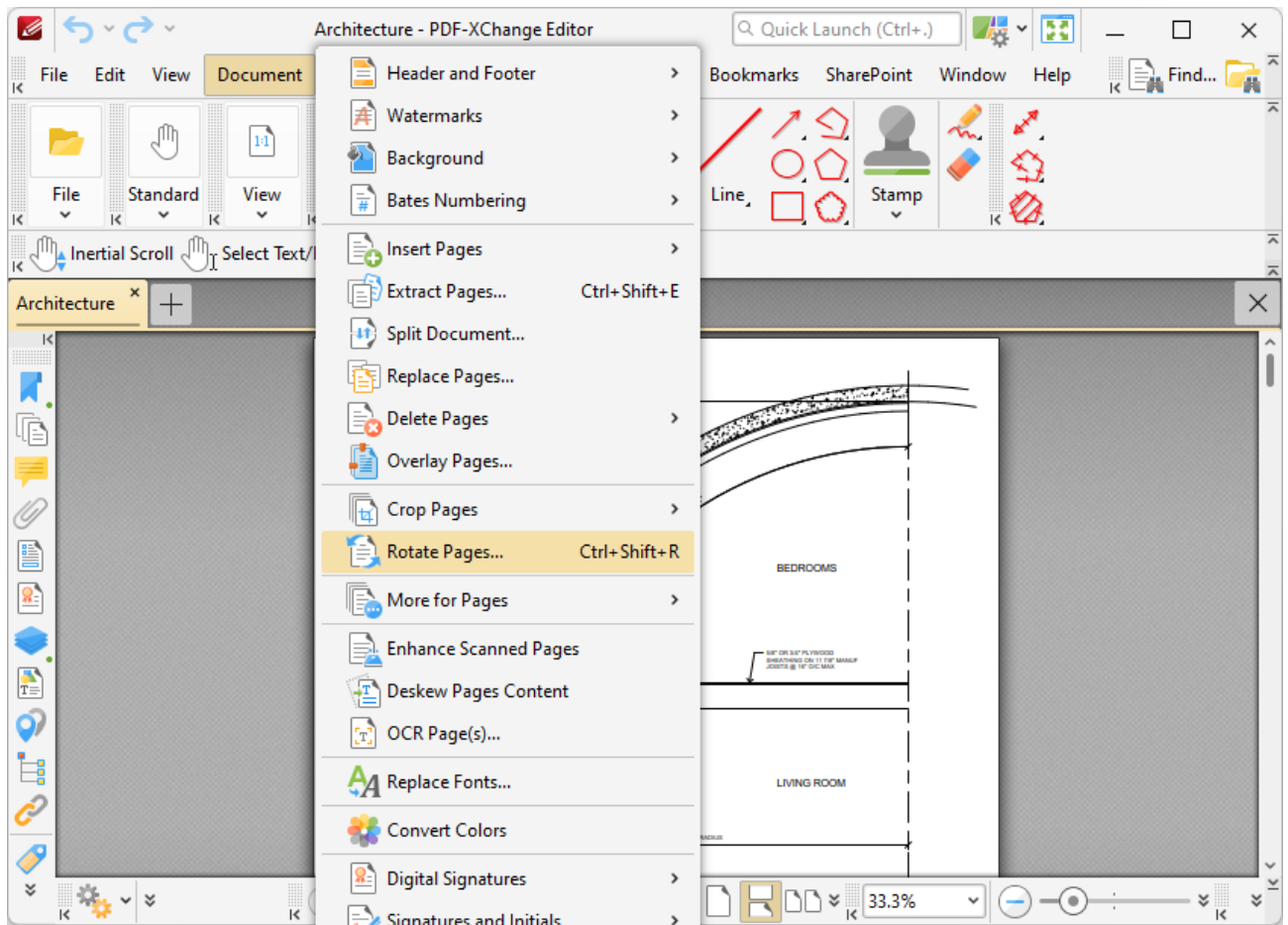
Figure 1. Document Tab Submenu, Rotate Pages

The **Rotate Pages** dialog box will open:
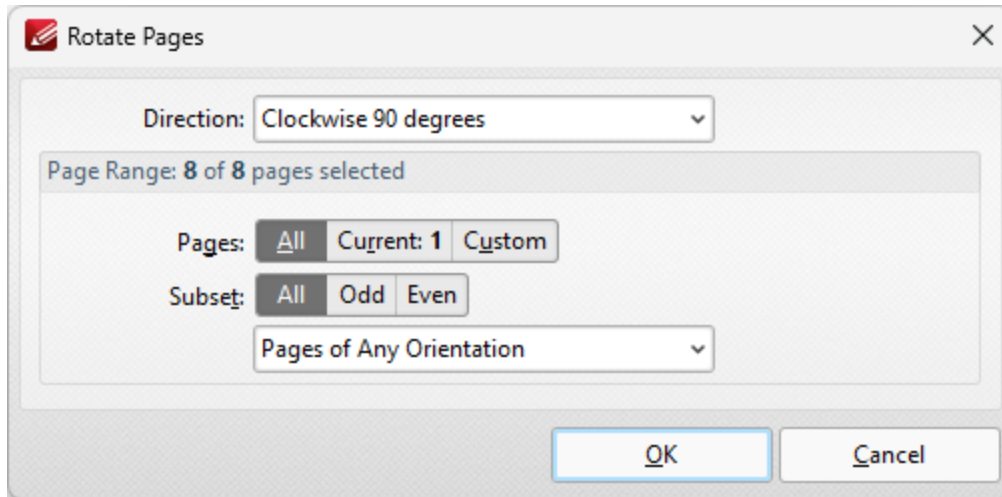
Figure 2. Rotate Pages Options

- Use the **Direction** dropdown menu to determine the rotation.
- Use the **Page Range** settings to determine the page range of rotated pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to rotate pages.

5.4.13 **More for Pages**

More for Pages

Hover over **More for Pages** to view further page-editing options:
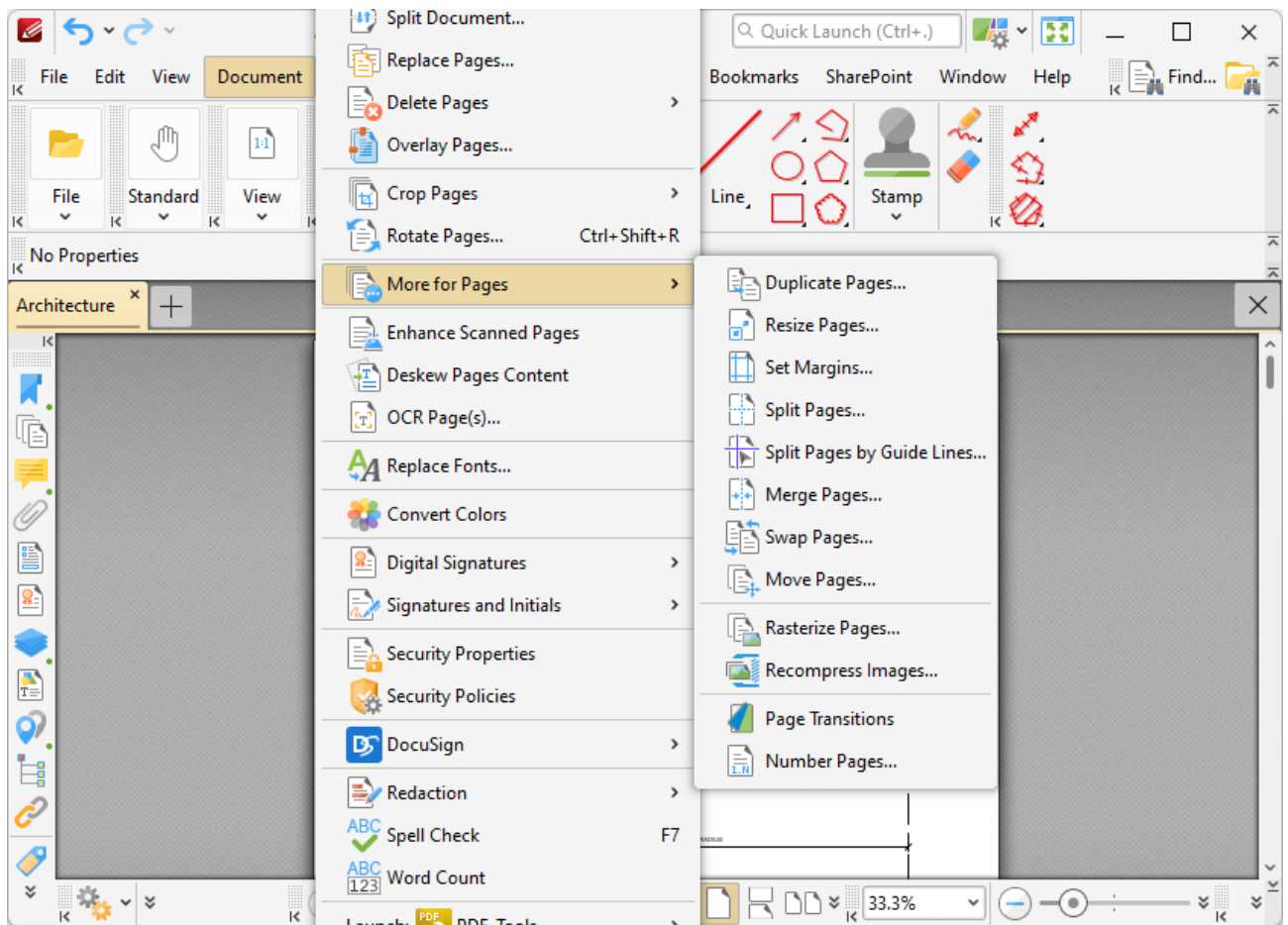
Figure 1. Document Tab Submenu, More for Pages

- Click **Duplicate Pages** to duplicate selected pages, as detailed **here.** 207
- Click **Resize Pages** to resize selected pages, as detailed **here.** 684
- Click **Set Margins** to set page margins, as detailed here.
- Click **Split Pages/Split Pages by Guide Lines** to split selected pages, as detailed **here.** 689
- Click **Merge Pages** to merge document pages, as detailed **here.** 694

- Click **Swap Pages** to swap the location of two document pages. The **Swap Pages** dialog box will open. Enter the page numbers of the pages to be swapped and click **OK** to swap.
- Click **Move Pages** to move a specified page range to a new document location, as detailed **here.** [699]
- Click **Rasterize Pages** to rasterize pages, as detailed **here.** [701]
- Click **Recompress Images** to recompress document images, as detailed **here.** [704]
- Click **Page Transitions** to determine how **PDF-XChange Editor** moves between pages in **Full Screen Mode.**
- Click **Number Pages** to view the **Number Pages** options, as detailed **here.** [709]

5.4.13.1 Duplicate Pages

Duplicate Pages

Click **Duplicate Pages** to duplicate document pages and insert them at a specified document location:
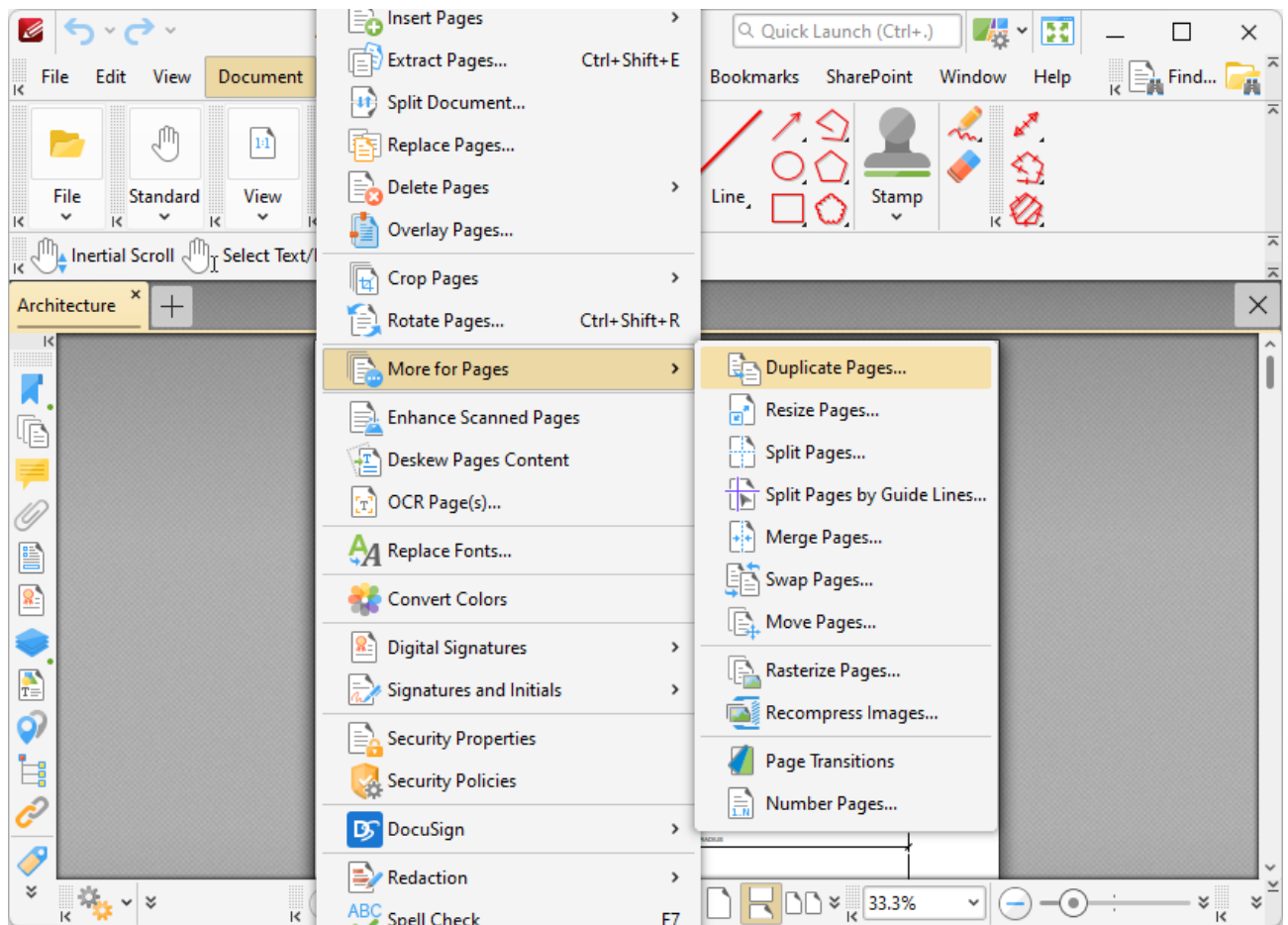
Figure 1. Document Tab Submenu, More for Pages, Duplicate Pages

The following dialog box will open:
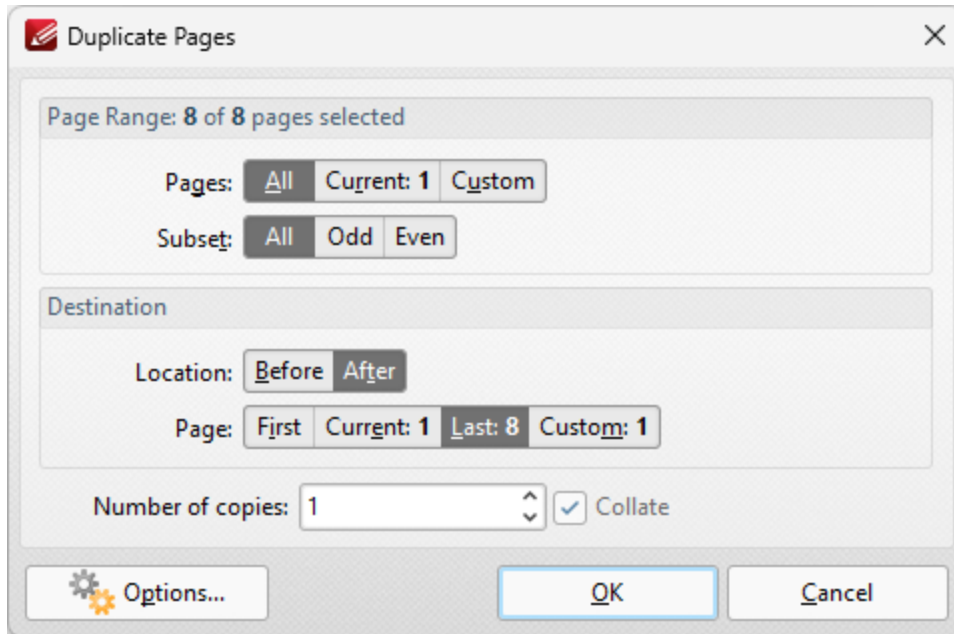
Figure 2. Duplicate Pages Dialog Box

Use the **Actions with Objects** dropdown menus to determine the actions taken for comments and form fields contained within duplicated pages.

Use the **Page Range** settings to determine the page range of duplicated pages:
- Select **All** to specify all pages.
- Select **Current** to specify only the current page.
- Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Use the **Destination** settings to determine the insertion location of duplicated pages:

- Select either **Before** or **After** in the **Location** dropdown menu.
- Select **First Page** or **Last Page** as desired. Alternatively, select **Page** to specify a different document page.
- Use the **Number of copies** dropdown menu to determine the amount of duplicates created.

Click **OK** to duplicate pages.

5.4.13.2 Resize Pages

Resize Pages

Click **Resize Pages** to resize document pages:
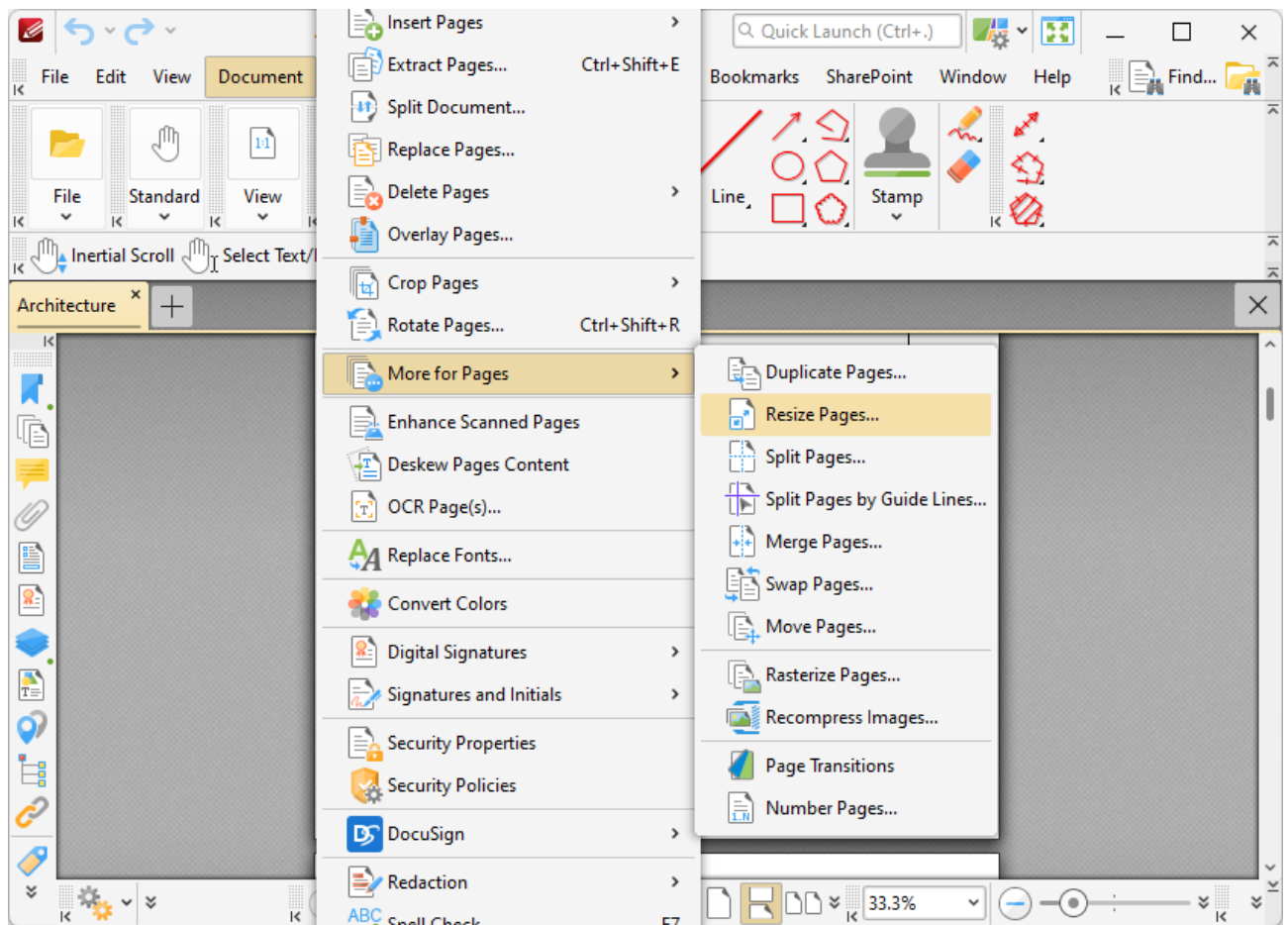
Figure 1. Document Tab Submenu, More for Pages, Resize Pages

The following dialog box box will open:
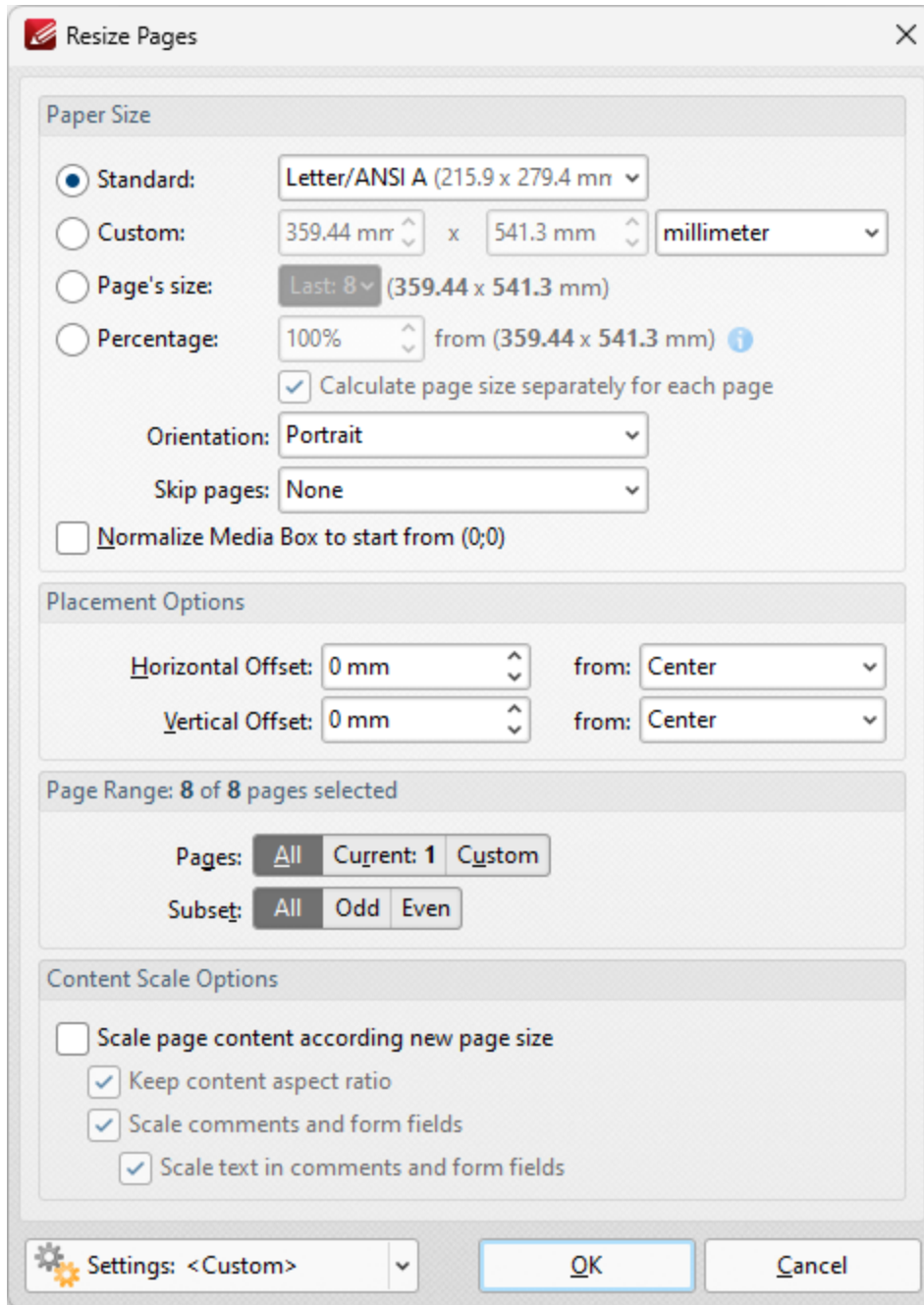
Figure 2. Resize Pages Dialog Box

- Use the **Paper Size** options to determine the size and layout of resized pages:
  - Click **Standard** to select a standard size, such as those used by the **ISO** and **ANSI**. Use the adjacent box to select either **Landscape** or **Portrait** as the page orientation.
  - Click **Custom** to enter custom dimensions. Enter the dimensions in the number boxes and select the units of measurement as desired.
  - Click **Page's Size** to use the dimensions of an existing document page, then select the desired page in the dropdown menu.
  - Click **Percentage** to resize pages to a percentage of the existing page size.

- Use the **Orientation** dropdown menu to determine the orientation of resized pages.
- Use the **Skip Pages** dropdown menu to skip document pages from being resized as required.
- Select the **Normalize Media Box to start from (0;0)** box to reset the media box coordinates in cases where previous operations have shifted them from the default location.
- Use the **Placement** options to determine the horizontal/vertical offset of resized pages and the location from which the offset is made.
- Use the **Page Range** settings to determine the page range of resized pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** [1274]
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Use the **Content Scale Options** to determine the scale of page content in relation to the new page size:
  - Select the **Scale page content according new page size** box to scale the content of resized pages to the new page size.
  - Clear the **Keep content aspect ratio** box to scale all content of resized pages to the new page size.
  - Select the **Scale comments and form fields** and **Scale text in comments and form fields** boxes as desired.

Click **OK** to resize pages.

5.4.13.3 Set Margins

Set Margins

Click **Set Margins** to set the margins of the current document:
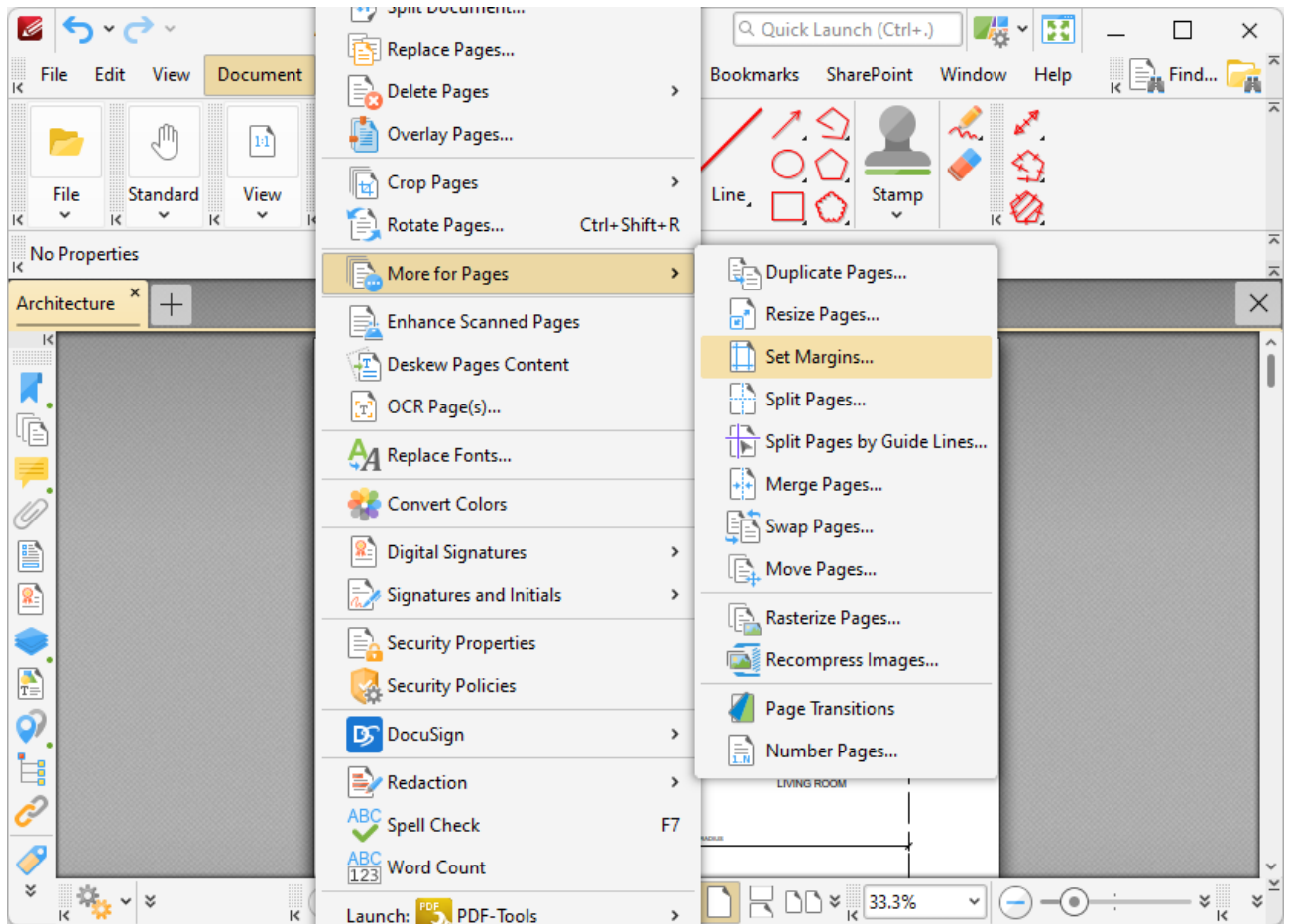
Figure 1. Document Tab Submenu, More for Pages, Set Margins

The **Set Margins** dialog box box will open:
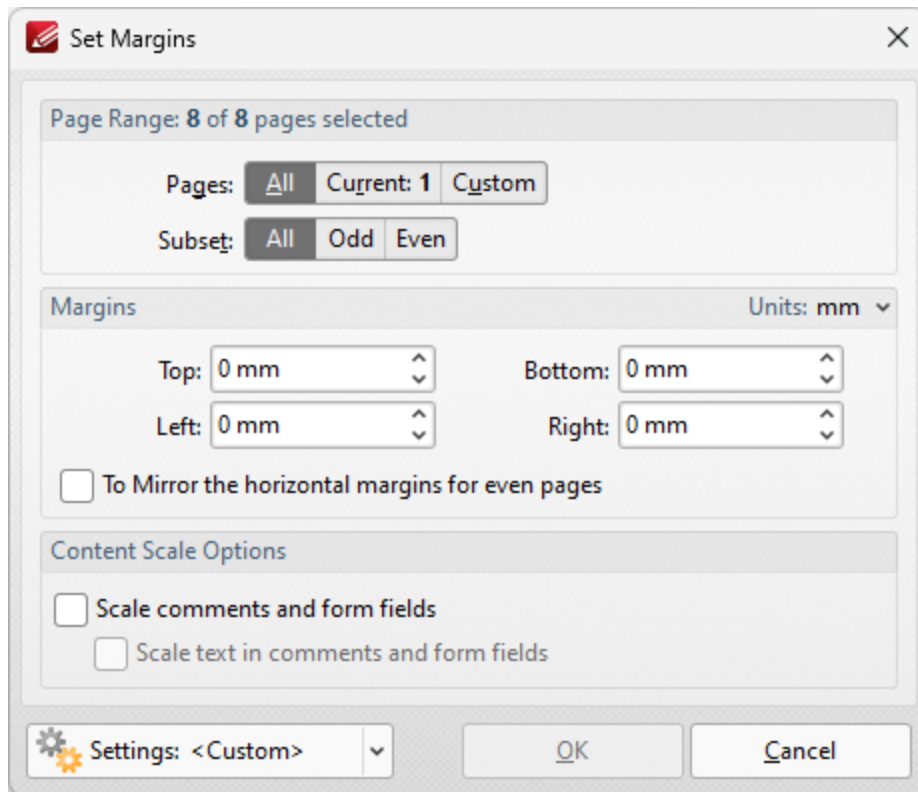
Figure 2. Set Margins Dialog Box

- Use the **Page Range** settings to determine the page range for the new margins:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** [1274]
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Use the **Margins** dropdown menus to determine the new margins for the document.
- Use the **Units** dropdown menu to determine the units used for the margins.
- Select the **To Mirror the horizontal margins for even pages** box to create mirror-image margins for even pages in the document. This is a useful feature if you are printing books/booklets, or printing on both sides of each paper sheet.
- Select the **Scale comments and form fields** and **Scale text in comments and form fields** boxes as desired.

Click **OK** to set margins.

5.4.13.4 Split Pages

Split Pages

Click **Split Pages** to split document pages:
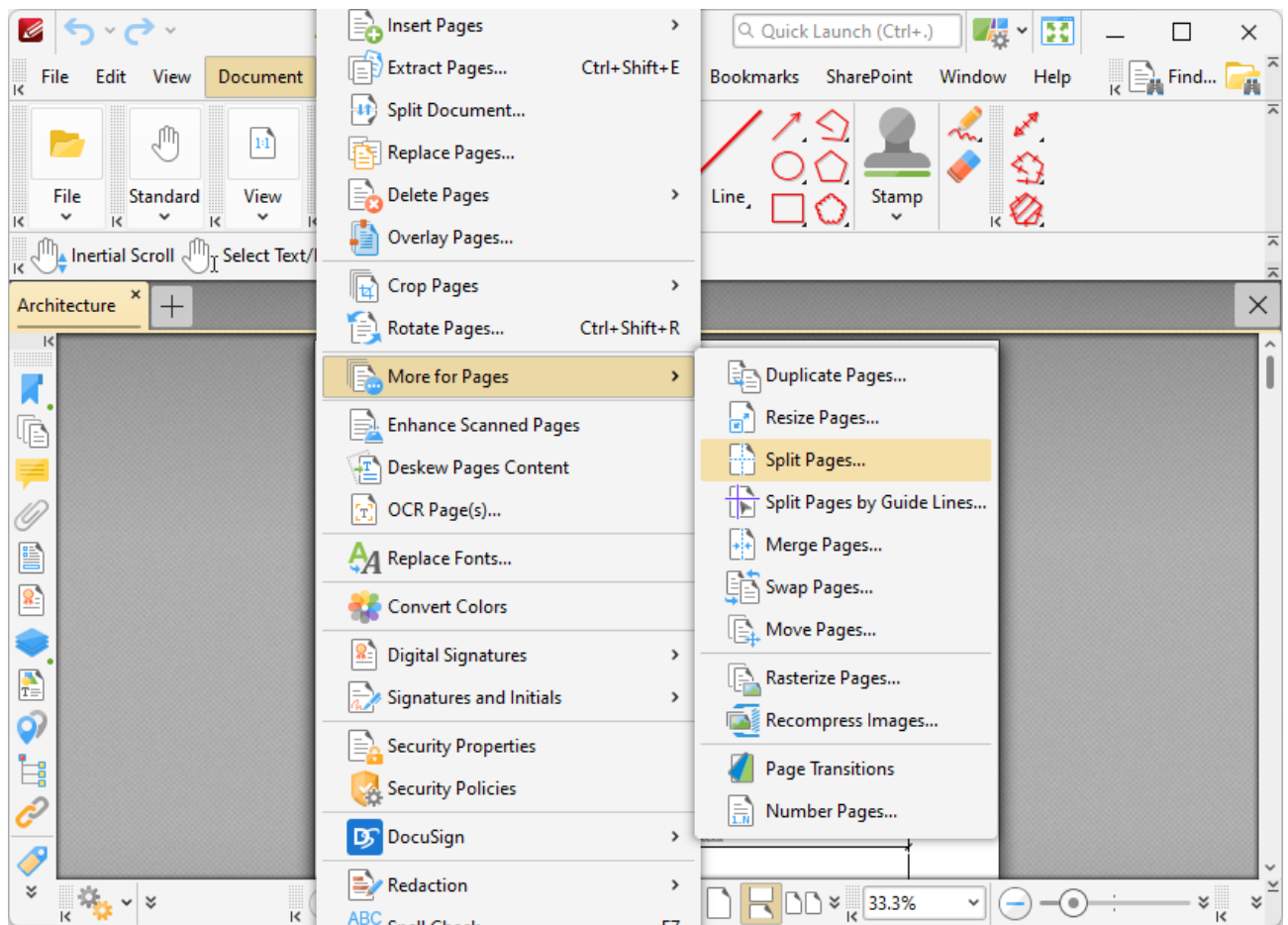
Figure 1. Document Tab Submenu, More for Pages, Split Pages

The **Split Pages** feature is a convenient feature for splitting document pages into smaller sections. When it is selected, the following dialog box will open:
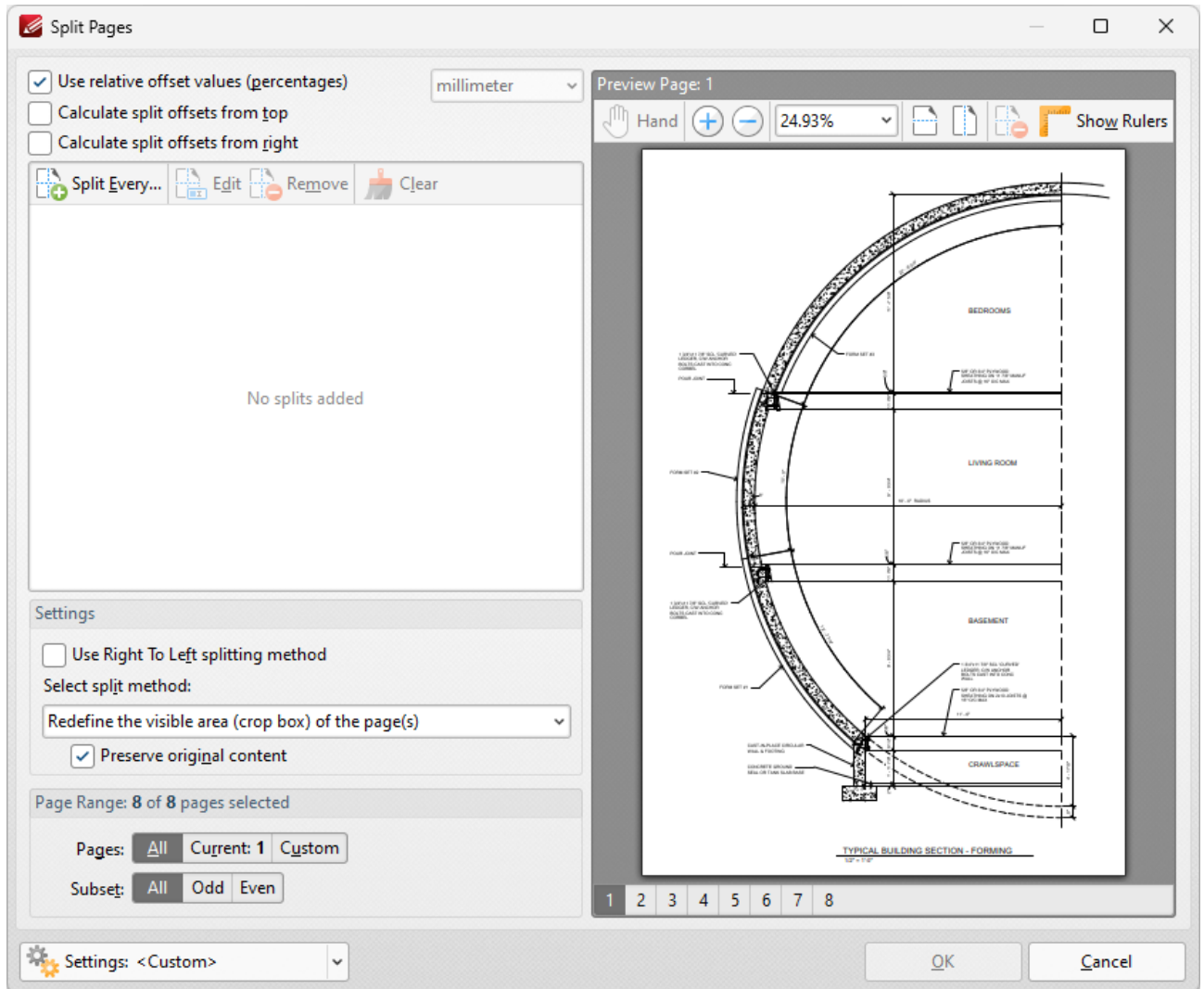
Figure 2. Split Pages Dialog Box

- Percentage is the default method used to split pages. Clear the **Use relative offset values** box to use metric measurements instead.
- Click **Split Every** to split at even intervals throughout the document. The **Split Every** dialog box will open, as detailed below.
- Click **Add Horizontal Split** and/or **Add Vertical Split** at the top of the preview pane to add splits to documents. Splits are inserted at 50% by default and will appear in the preview pane and the list of splits when these options are used, as detailed above. Click and drag to reposition splits as desired.
- Use the plus and minus zoom icons to edit the view of the preview pane.
- Click **Edit Split/Remove Split** to edit/remove selected splits in the list of splits.
- Select the **Use Right To Left splitting method** box to split documents from right to left. Note that the order in which documents are split determines the order of sections in the split document.

- 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.
- Select an option from the **Select split method** dropdown menu to determine the method used to split documents:
    - **Change the physical size of the pages** adjusts the size of pages in order to split them.
    - **Redefine the visible area (crop box) of the pages** adjusts the crop box of pages. Further information about the crop box and other page boxes is available **here.** 1271 When this option is used the **Preserve original content** box is available. If this option is enabled then the visible page area will be reduced, but the cropped content will remain available and be present if, for example, pages are resized subsequently.
- Use the **Page Range** settings to determine the page range of split pages:
    - Select **All** to specify all pages.
    - Select **Current** to specify only the current page.
    - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
    - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to split pages.
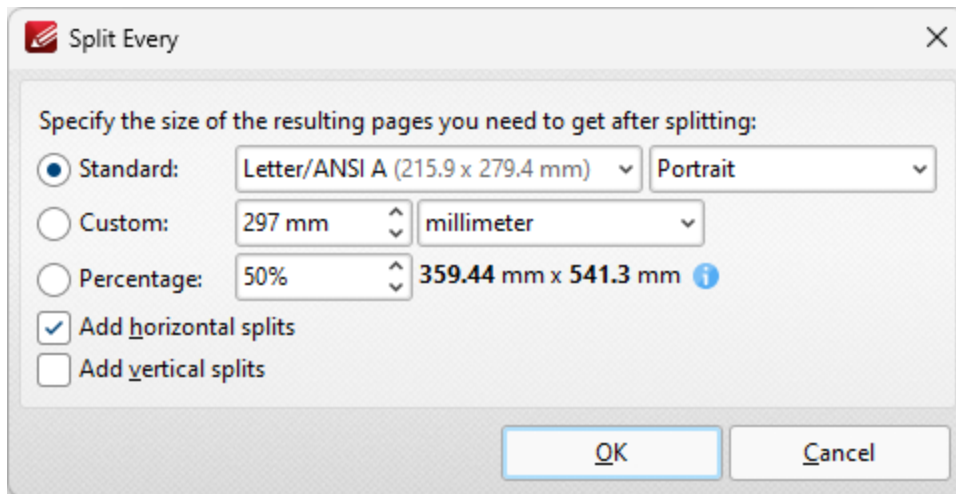
Figure 3. Split Every Dialog Box

- Select **Standard** to split documents at intervals of standard dimensions, then select the desired dimension in the dropdown menu, and specify the desired orientation in the second dropdown menu.
- Select **Custom** to split documents at intervals of custom dimensions, then enter the desired dimensions and units of measurement in the adjacent number box and dropdown menu.
- Select **Percentage** to split documents according to a percentage of the document page size.
- Select the **Add horizontal/vertical splits** boxes as desired.

Click **OK** to split pages.

Split Pages by Guide Lines

The **Split Pages by Guide Lines** feature is used to split documents according to guide lines, which you can create and edit as detailed **here.** 610 When this option is selected the **Split Pages** dialog box will open:
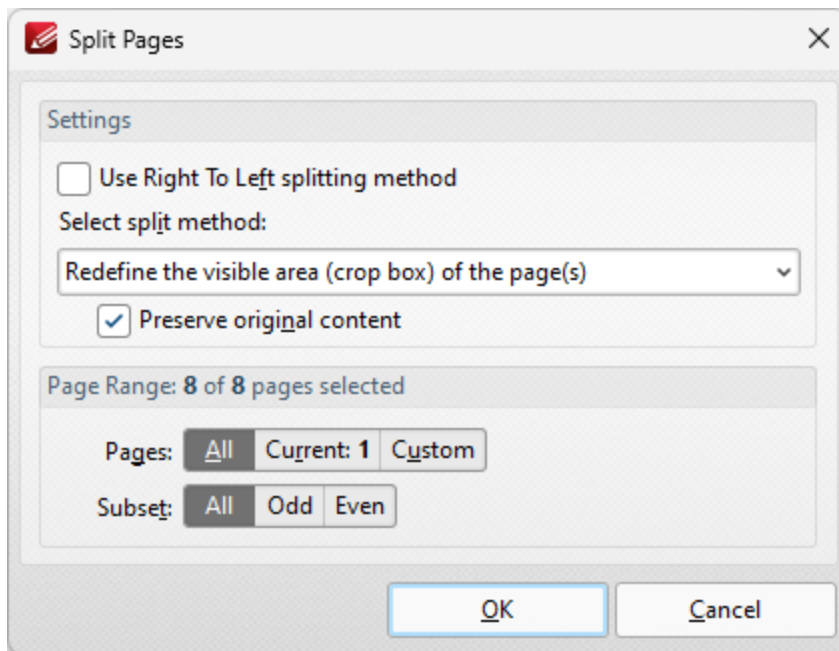
Figure 4. Split Pages Dialog Box

- Select the **Use Right to Left splitting method** box to split documents from the top-right corner, or clear this box to split documents from the top-left corner.
- Select the **Remove source pages after splitting them** box to remove split pages from the document when the split is performed.
- Use the **Select split method** dropdown menu to determine the type of split that is performed:
    - Select **Redefine the visible area (crop box) of the page(s)** to redefine the **crop box** 1271 in order to crop pages.
    - Select **Change the physical size of the pages** to change the size of pages in order to crop pages.
    - Select the **Preserve original content** to preserve the original document content when pages are split.
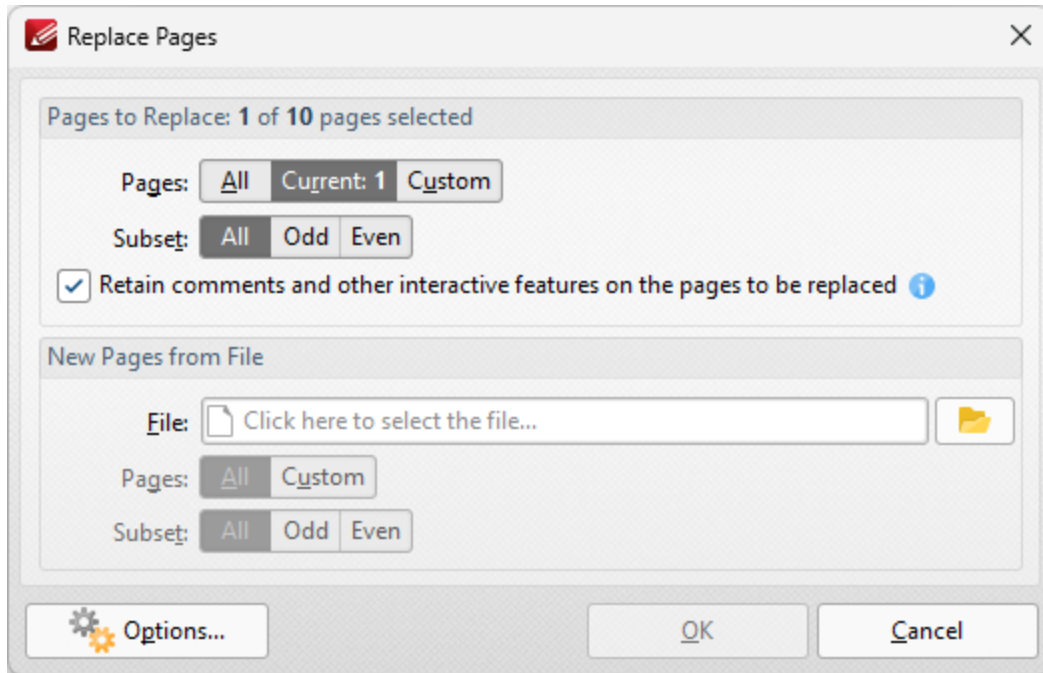- Use the **Page Range** settings to determine the page range of split pages:
    - Select **All** to specify all pages.
    - Select **Current** to specify only the current page.

- Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to split pages.

5.4.13.5 **Merge Pages**
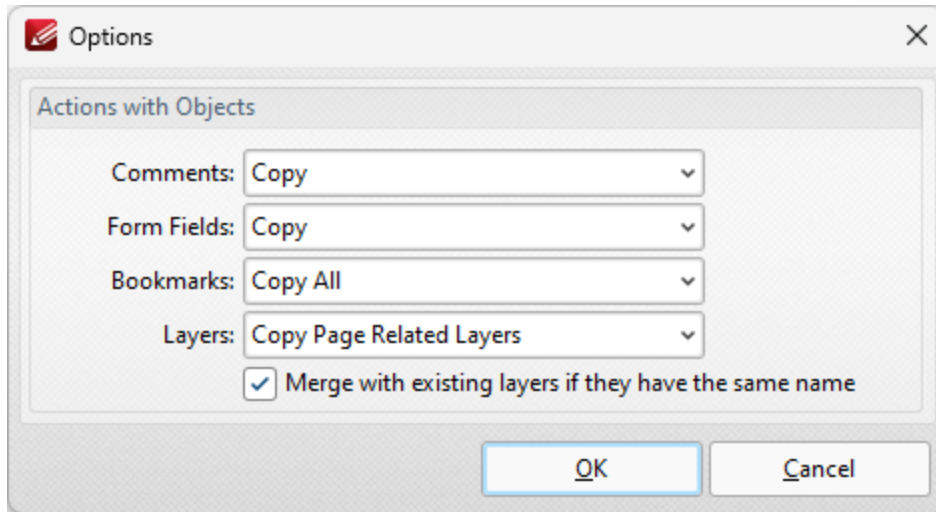
Merge Pages

Click **Merge Pages** to merge document pages:
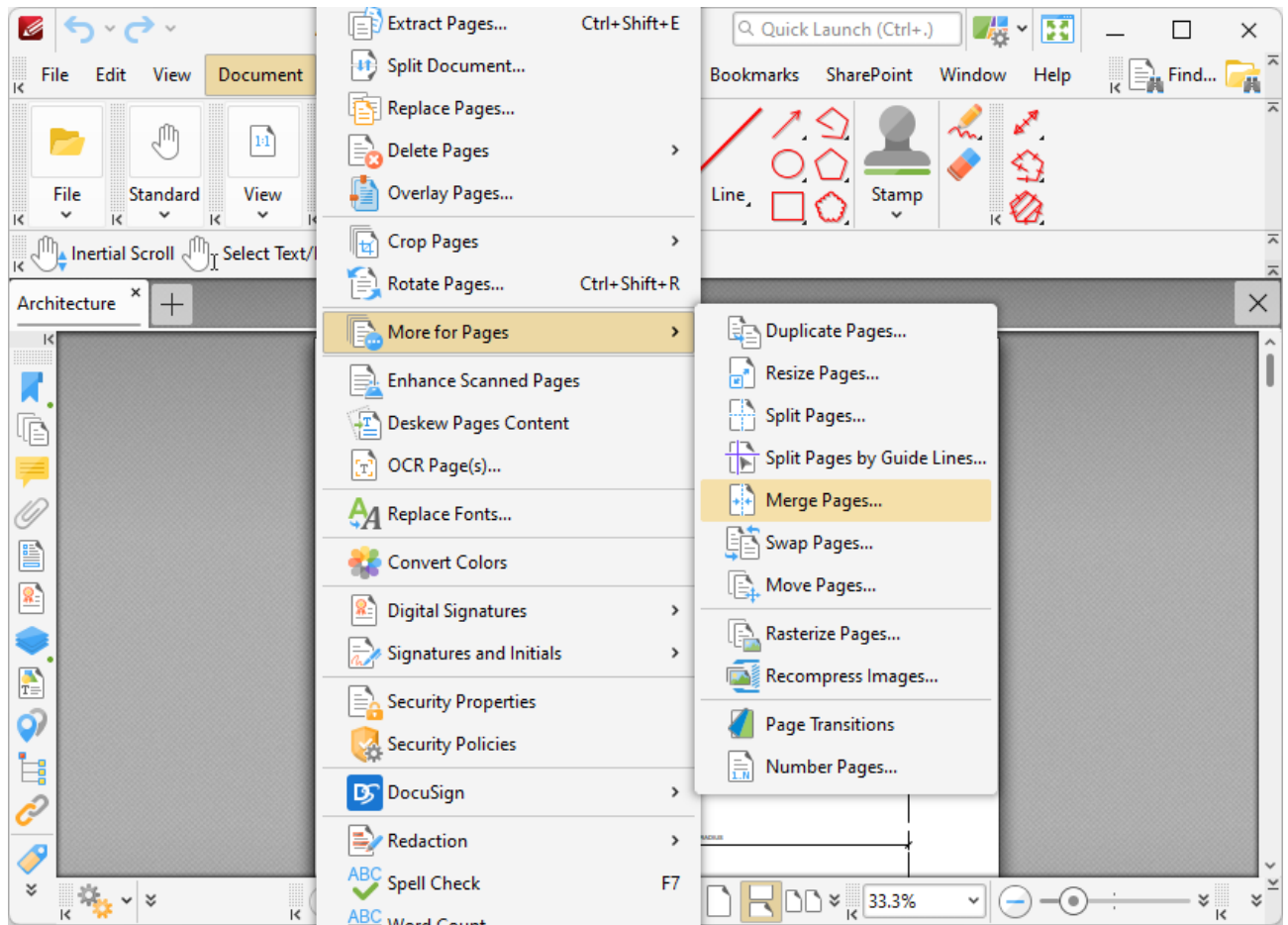
Figure 1. Document Tab Submenu, More for Pages, Merge Pages

The **Merge Pages** dialog box will open:
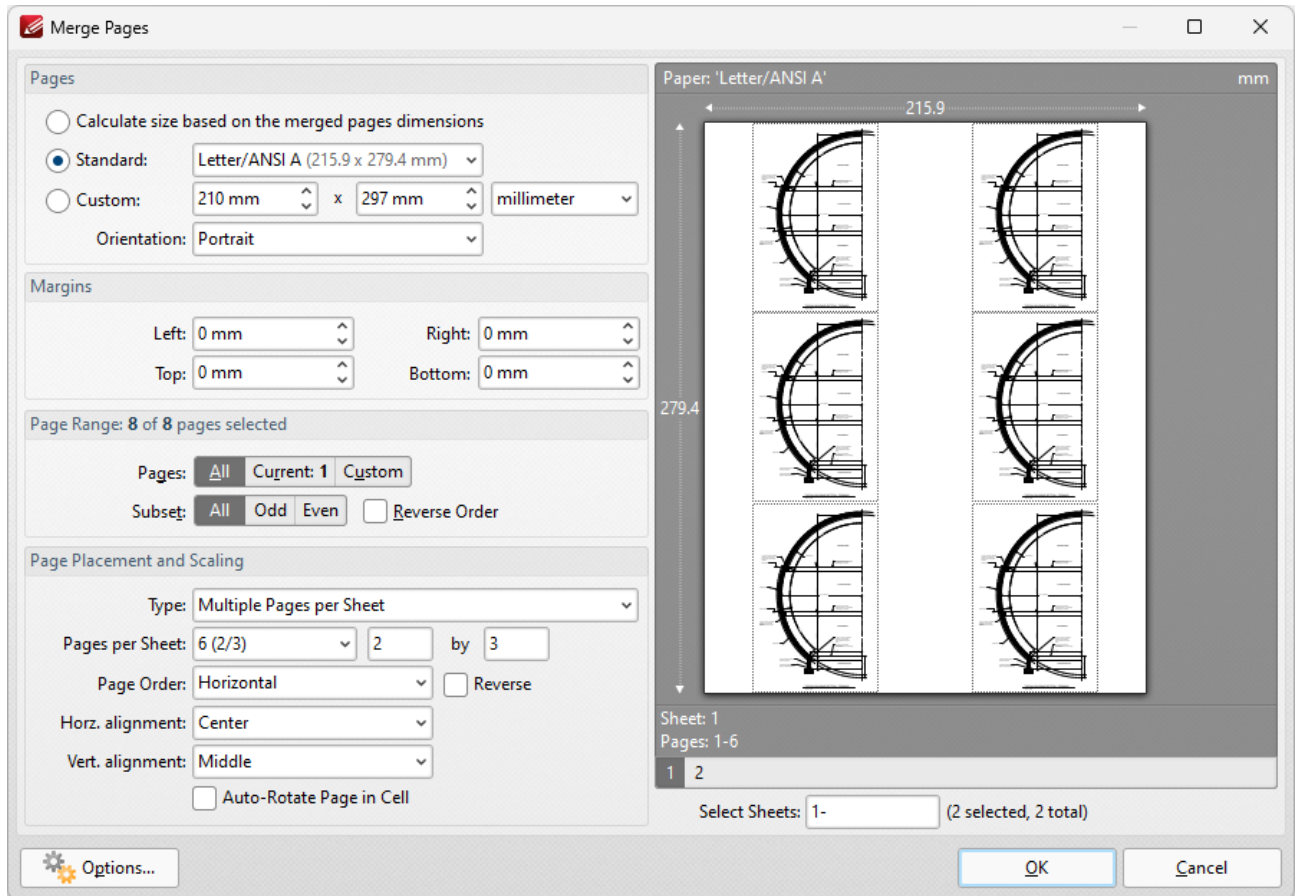
Figure 2. Merge Pages Dialog Box

- Use the **Pages** options to determine the size of the new page:
  - Click **Calculate Size based on the merged pages dimensions** to retain the size of the source pages in the output document.
  - Click **Standard** to use a standard page size for the output document, then select an option in the dropdown menu.
  - Click **Custom** to use a custom page size for the output document, then enter the measurements in the combo boxes and select a unit of measurement as desired.
  - Use the **Orientation** dropdown menu to determine the orientation of the output document.
- Use the **Margins** number boxes to determine the margins of the output document.
- Use the **Page Range** settings to determine the page range of merged pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

- Use the **Page Placement and Scaling** options to determine how source pages are placed in the output document, as detailed in the preview pane when settings are edited.
- Select/clear the **Remove source pages after merging them** box as desired.

Click **OK** to merge pages.

5.4.13.6 Swap Pages

Swap Pages

Click **Swap Pages** to swap the location of two document pages:
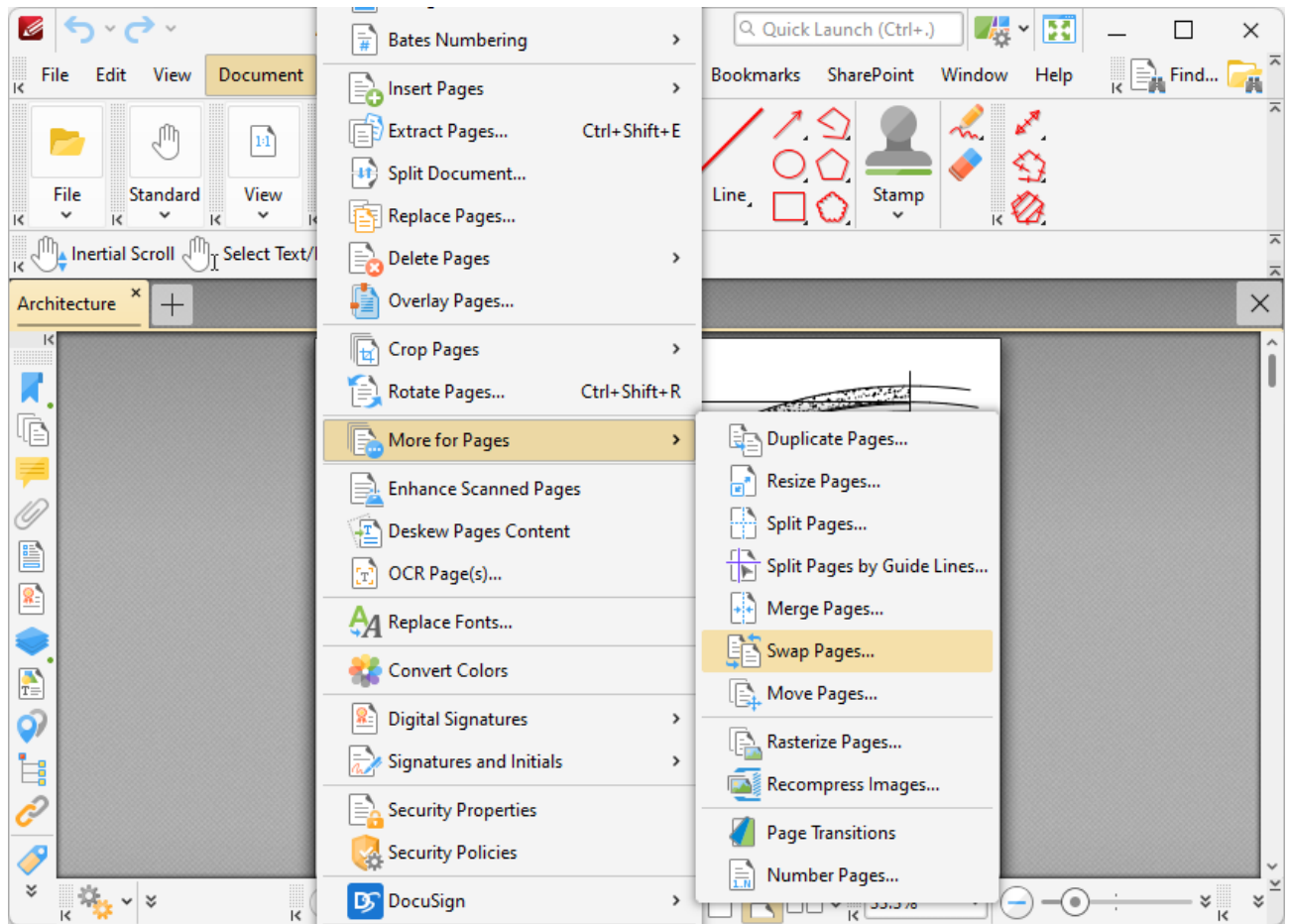
Figure 1. Document Tab Submenu, More for Pages, Swap Pages

The following dialog box will open:
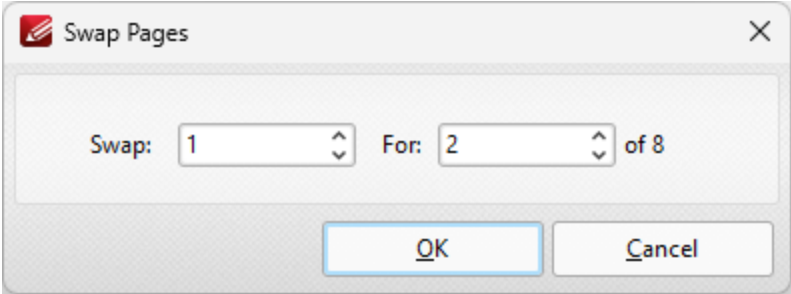
Figure 2. Swap Pages Dialog Box

Enter the page numbers of the pages to swap and then click **OK** to swap pages.

5.4.13.7 Move Pages

Move Pages

Click **Move Pages** to move a specified page range to a new document location:
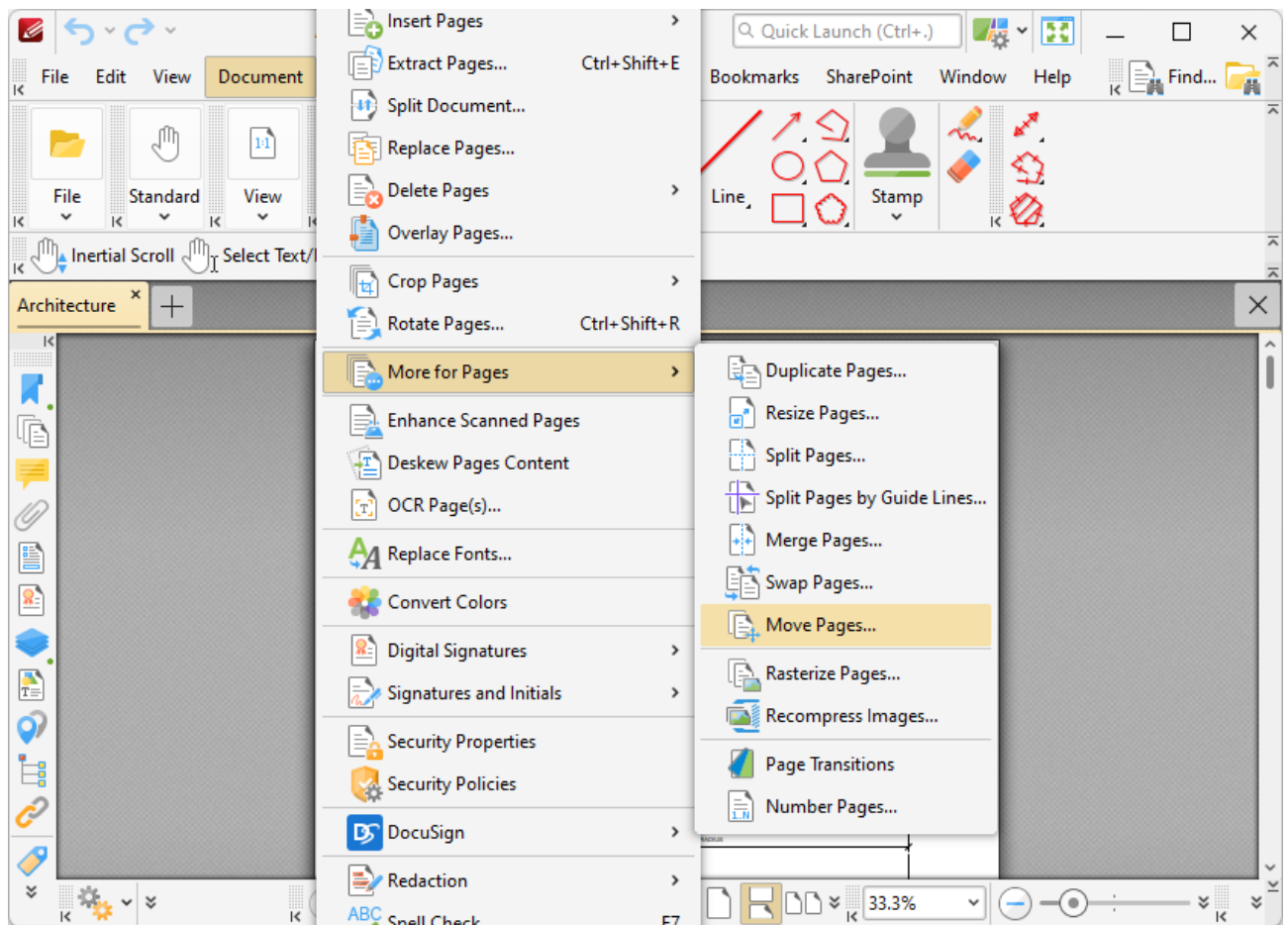
Figure 1. Document Tab Submenu, More for Pages, Move Pages

The following dialog box will open:
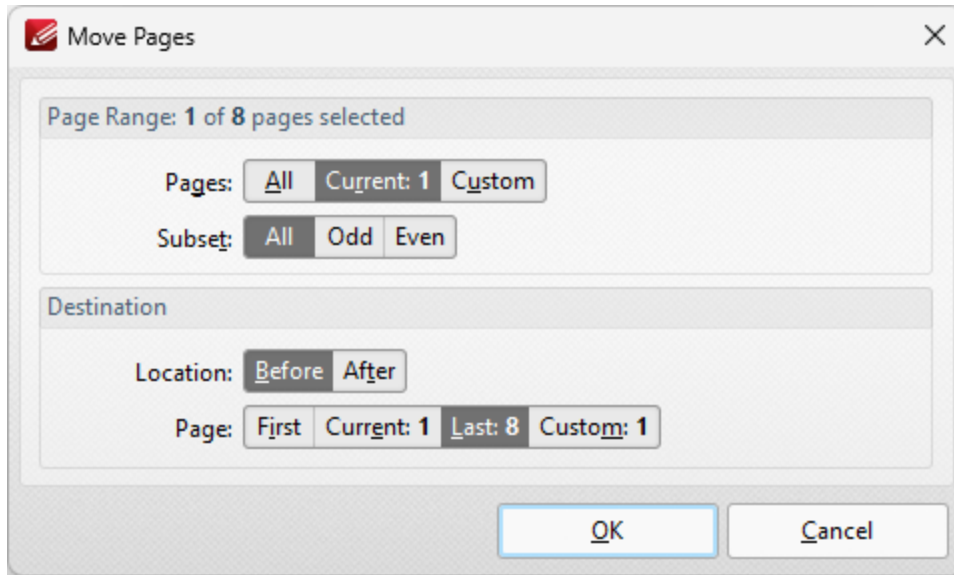
Figure 2. Move Pages Dialog Box

Use the **Page Range** settings to determine the page range of moved pages:
- Select **All** to specify all pages.
- Select **Current** to specify only the current page.
- Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Use the **Destination** settings to determine the new location of the specified pages:

- Select either **Before** or **After** in the **Location** dropdown menu.
- Select **First Page** or **Last Page** as desired. Alternatively, select **Page** to specify a different document page.

Click **OK** to move pages.

5.4.13.8   **Rasterize Pages**

 Rasterize Pages

Click **Rasterize Pages** to rasterize document pages:
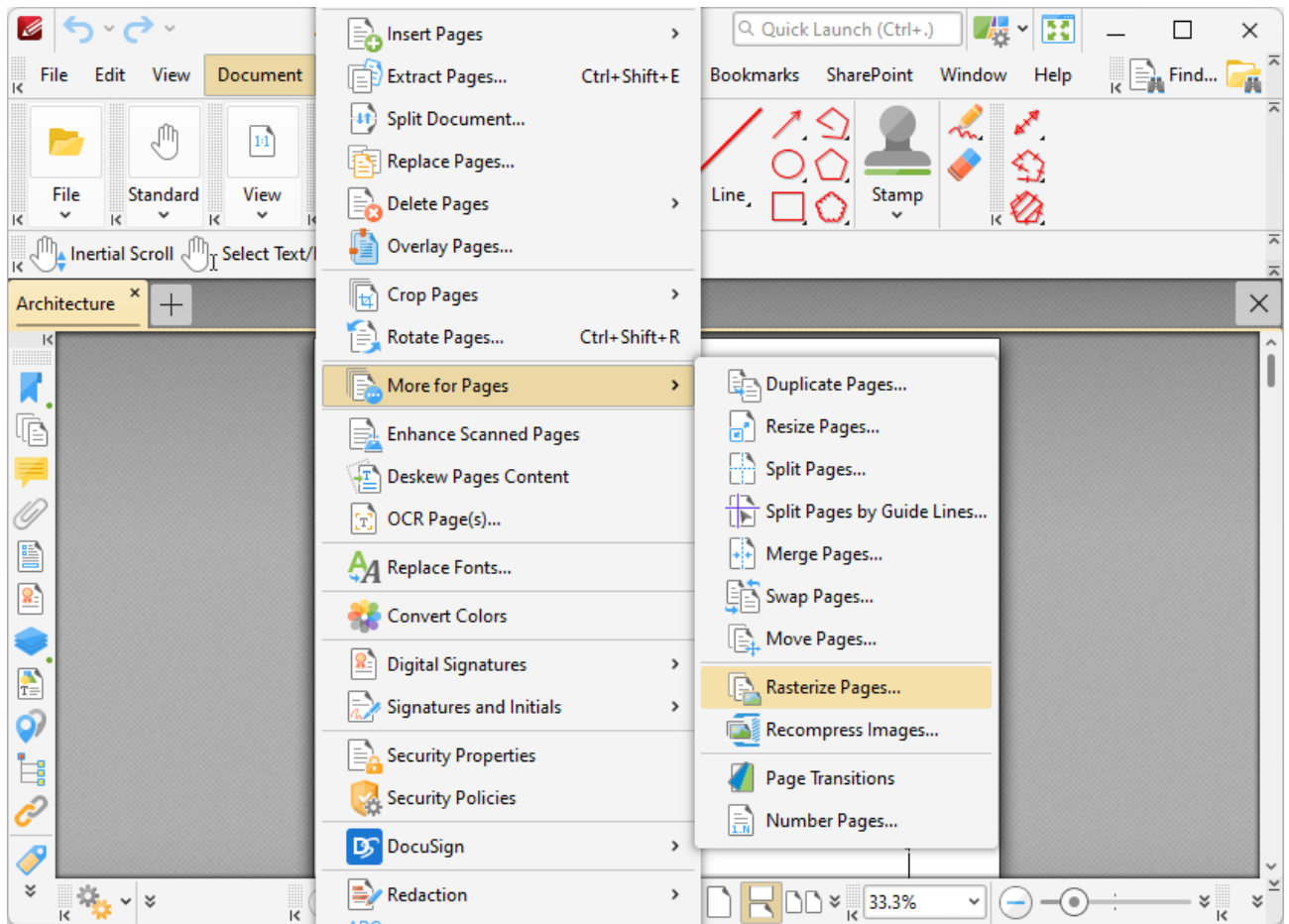
Figure 1. Convert Tab, Rasterize Pages Highlighted

Rasterization converts vector graphics into raster images. The main purpose of this process is to preserve resolution, as rasterized images always display in the the same manner regardless of their size. Vector images may not scale or print to an acceptable standard, and many printers use dots in order to print - which means they must first rasterize the content.

This can become a problematic process, and if you instead perform the rasterization before printing then you can avoid these issues.

When this feature is selected, the **Rasterize Pages** dialog box will open:
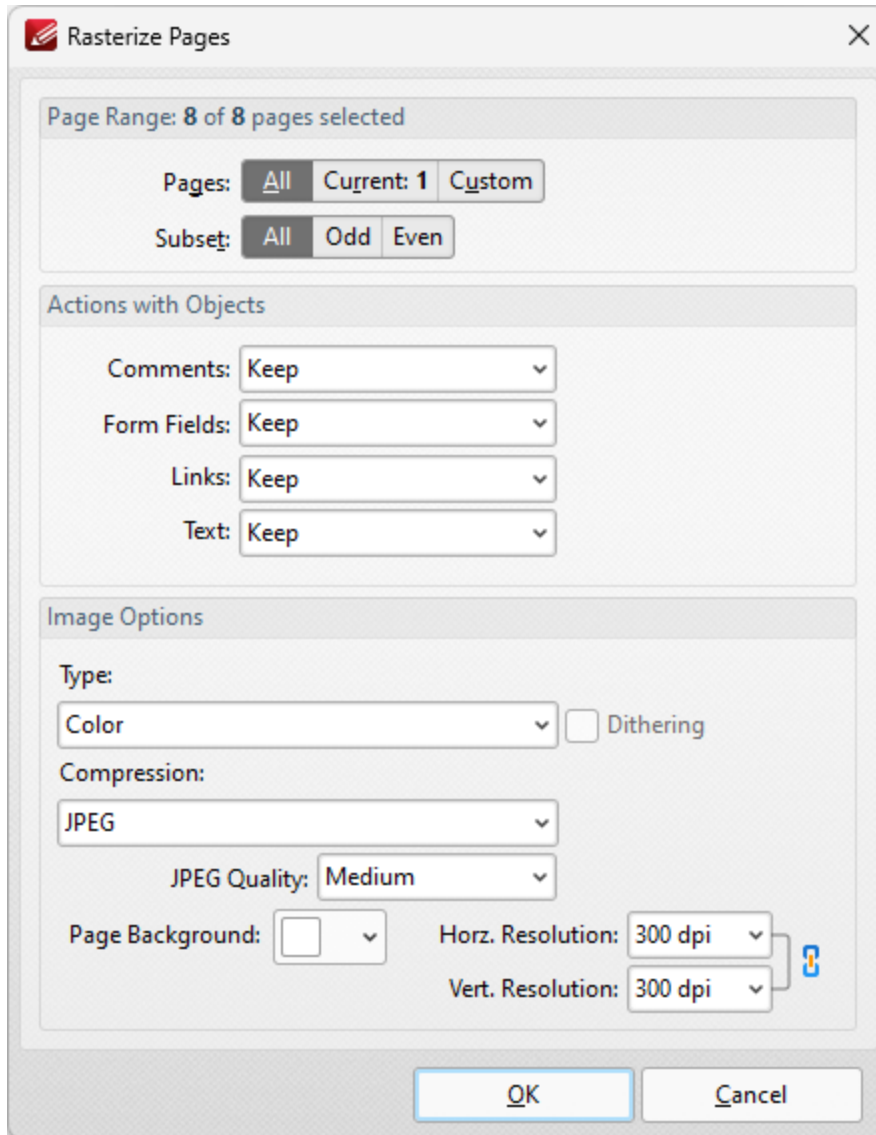
Figure 2. Rasterize Pages Dialog Box

- Use the **Page Range** settings to determine the page range of moved pages:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

- Use the **Actions with Objects** dropdown menus to determine the action taken for comments, form fields and links when rasterization is performed.
- Use the **Type** dropdown menu to determine the type of rasterization performed on the document.
- Use the **Compression** dropdown menu to determine the type of compression used for the rasterization.
- Use the **Page Background** dropdown menu to determine the fill color for transparent sections of the document when rasterization takes place.
- Use the **JPEG Quality** dropdown menu to determine the JPEG quality when JPEG compression is used.
- Use the **Horizontal and Vertical Resolution** number boxes to determine the resolution of rasterized images.

Click **OK** to rasterize pages.

5.4.13.9   Recompress Images

Recompress Images

Click **Recompress Images** to recompress document images:
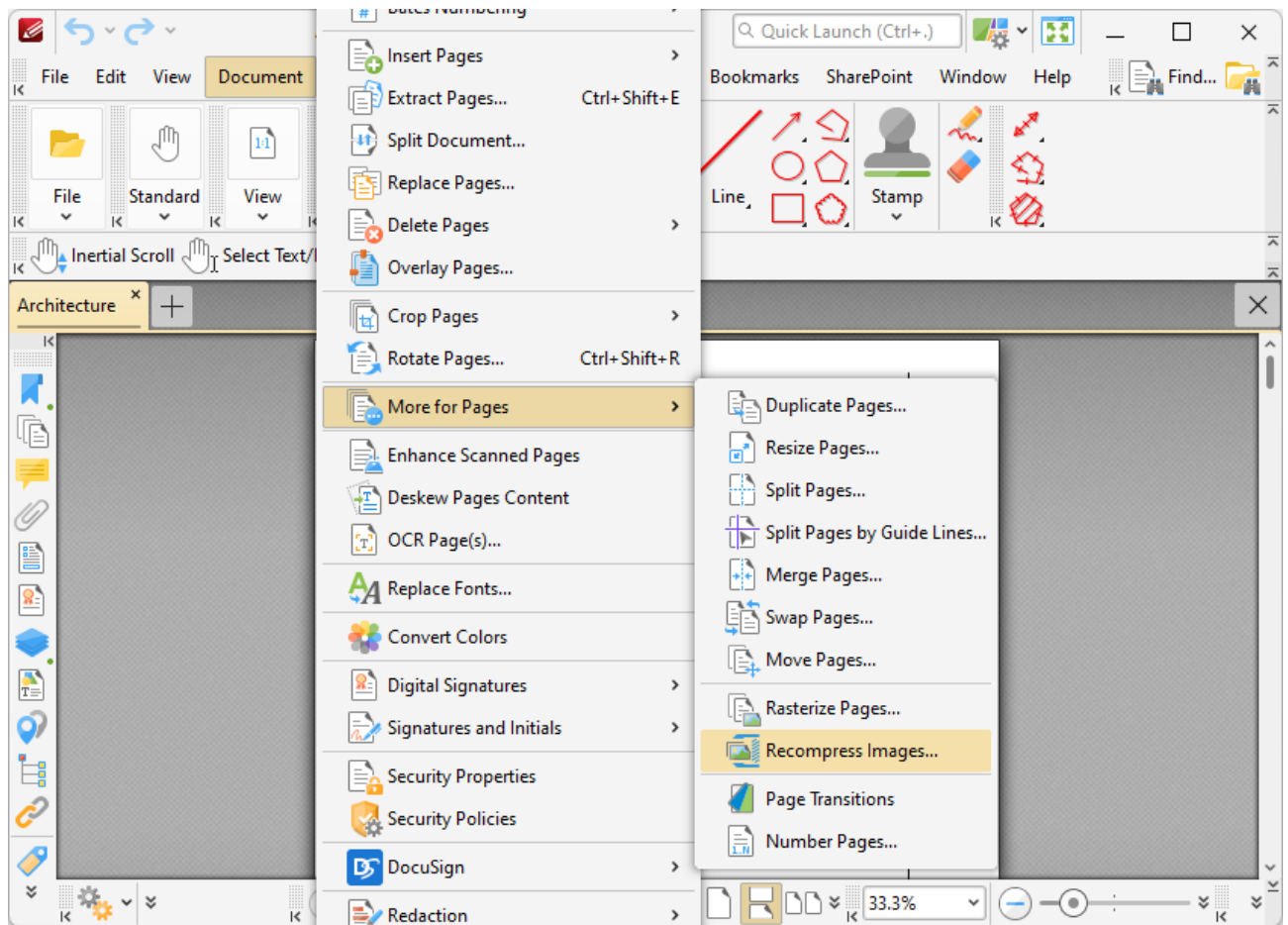
Figure 1. Document Tab Submenu, More for Pages, Recompress Images

The **Recompress Images** dialog box will open:
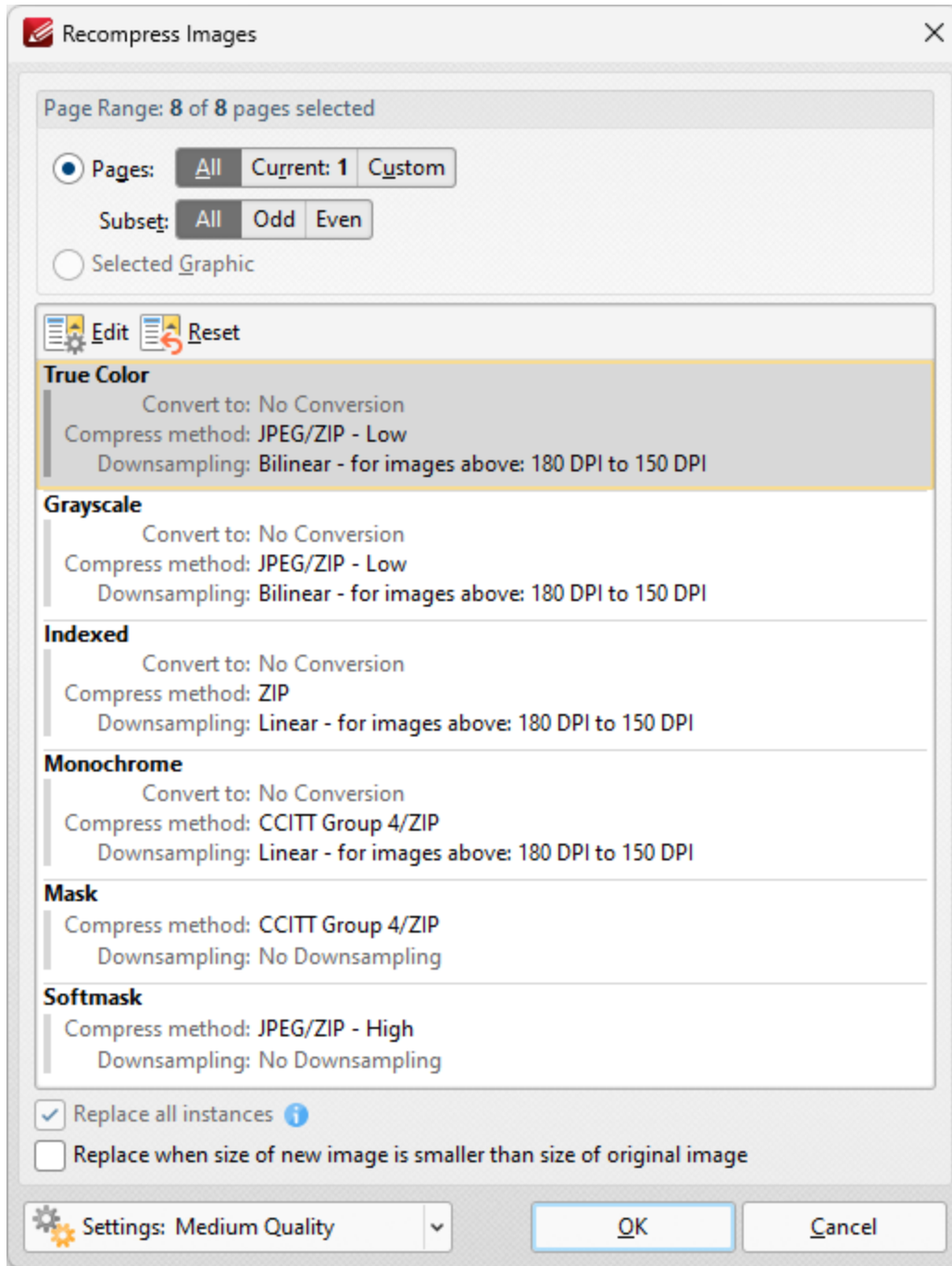
Figure 2. Recompress Images Dialog Box

- Use the **Page Range** options to determine the page range of images to be recompressed:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** [1274]

- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Alternatively, select the **Selected Graphic** button to recompress only the graphic currently selected in the document.

- Select a recompression option in the pane to determine the type of image recompression for the operation. Note that you can click **Edit** or **Reset** to edit/reset recompression settings.
- Select the **Replace all instances** box to replace all instances of the graphic that is being recompressed in cases where the graphic appears multiple times in the same document.
- Select the **Replace when size of new image is smaller than size of original image** box to replace recompressed images when they are smaller than the source image used to create them.
- Use the **Settings** dropdown menu to determine the quality of the recompression. Note that increasing quality will increase the file size and vice versa.

Click **OK** to recompress images.

5.4.13.10 Page Transitions

Page Transitions

Click **Page Transitions** to determine how **PDF-XChange Editor** moves through pages in full screen mode:
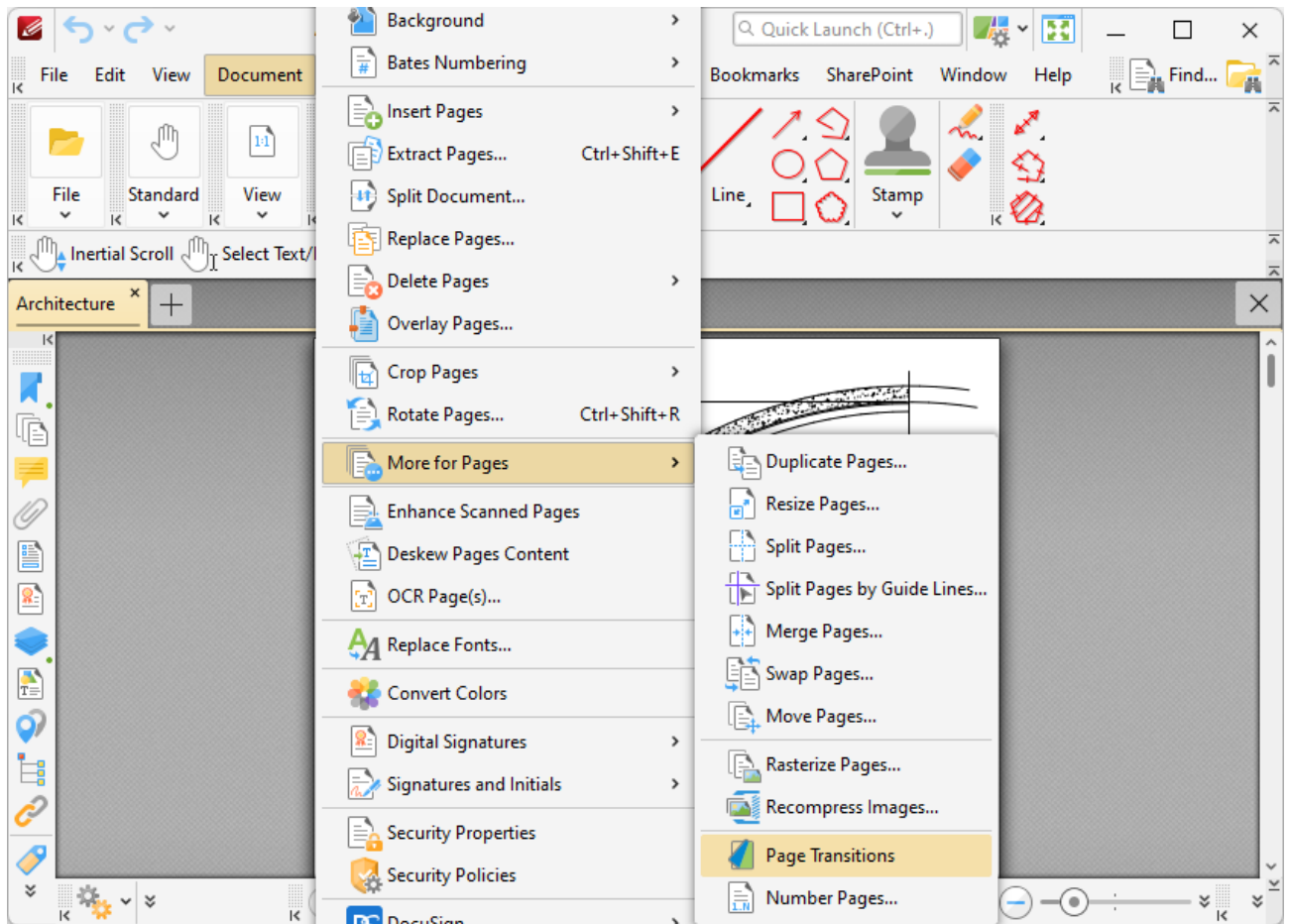
Figure 1. Document Tab Submenu, More for Pages, Page Transitions

The following dialog box will open:
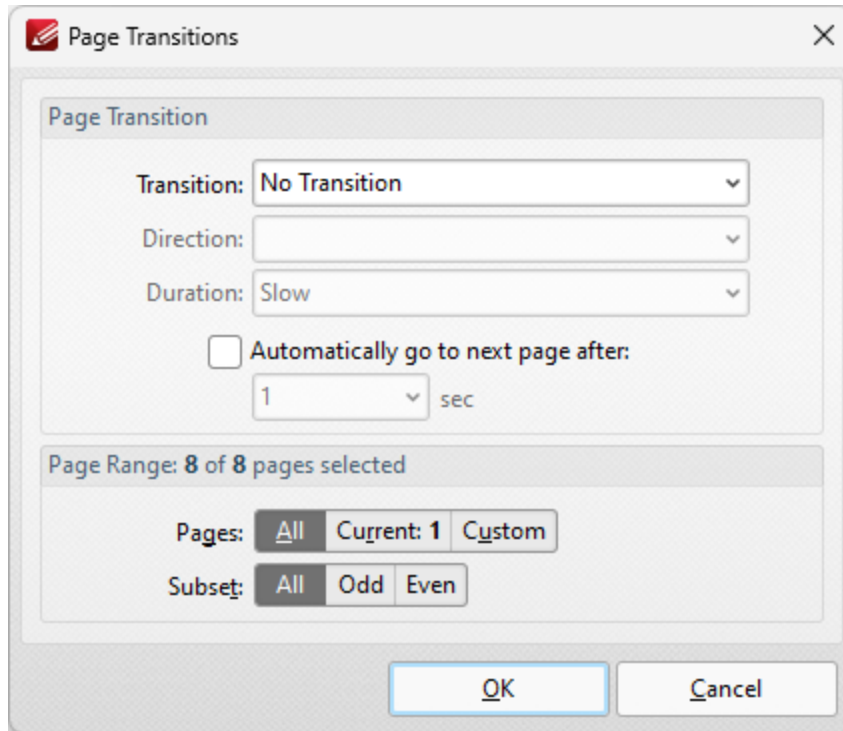
Figure 2. Page Transitions Dialog Box

Use the **Page Transition** settings to determine transition parameters:

- Use the **Transition** dropdown menu to determine the transition style.
- Use the **Direction** dropdown menu to determine the direction of transitions.
- Use the **Duration** dropdown menu to determine the rate of transitions.
- Select the check box to move automatically through pages, then select an option from the dropdown menu to set an automatic scrolling rate.

- Use the **Page Range** options to determine the page range of pages to be transitioned:
    - Select **All** to specify all pages.
    - Select **Current** to specify only the current page.
    - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
    - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to save transition settings.

5.4.13.11 Number Pages

Number Pages

Click **Number Pages** to number document pages and create number ranges:
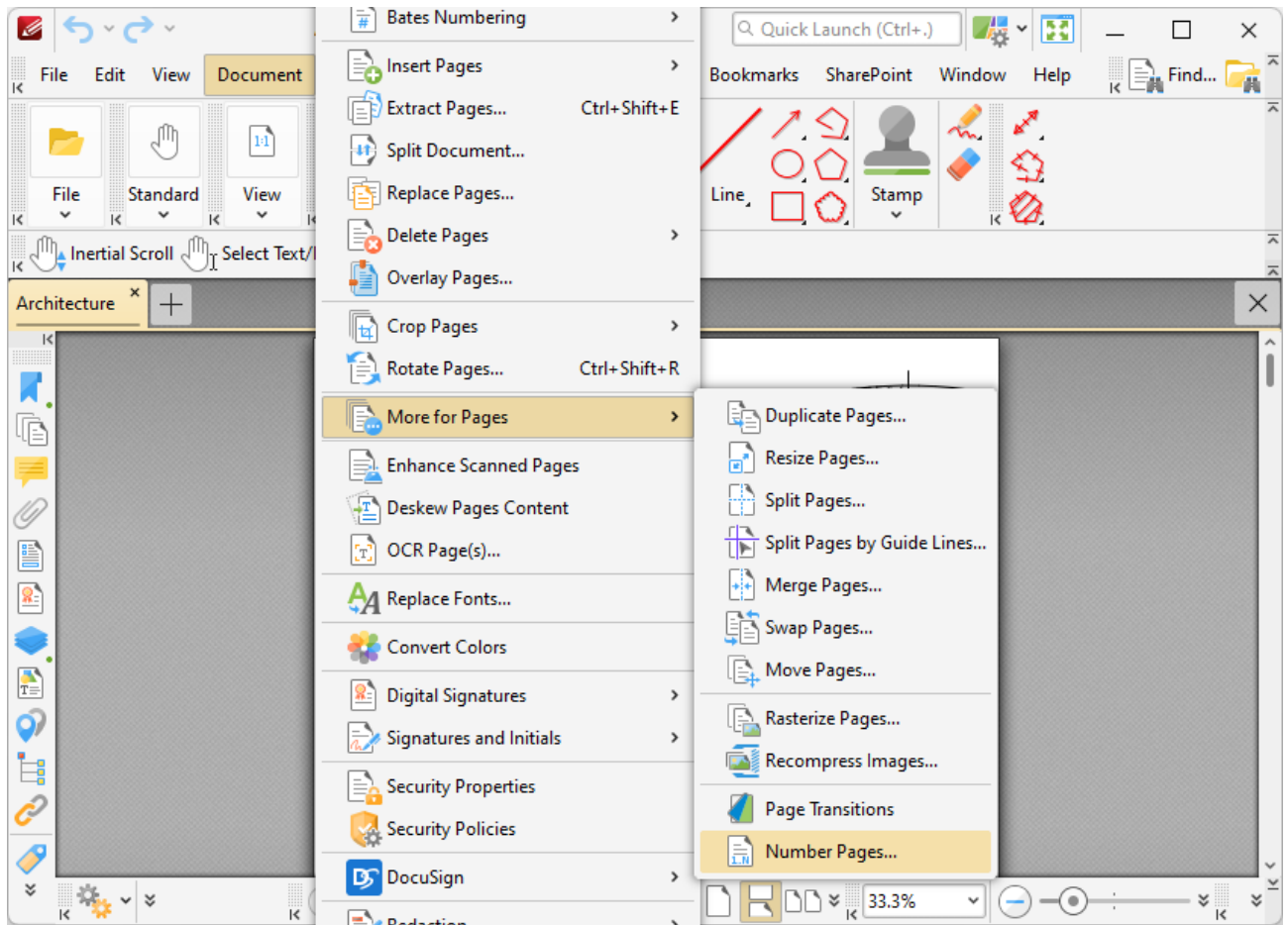
Figure 1. Document Tab Submenu, More for Pages, Number Pages

Please note that this feature relates to page numbers/ranges as they appear in the **Thumbnails** 510 pane and the **Page Navigation** 483 toolbar. (The **Header and Footer** 633 feature can be used to create/edit physical page numbers). The main purpose of this feature is to rectify cases where the page numbers on document pages do not match the page numbers that appear in the **Thumbnails** pane and the **Page Navigation** toolbar. This is often the case in documents that feature 'front matter' such as

copyright pages and/or a table of contents and other similar pages. Additionally, it is necessary to select the **Use logical page numbers** box in the **Page Display** ⎡238⎤ preferences tab, as detailed in **(figure 7),** in order for changes made with this feature to be visible.

When this option is selected, the following dialog box will open:
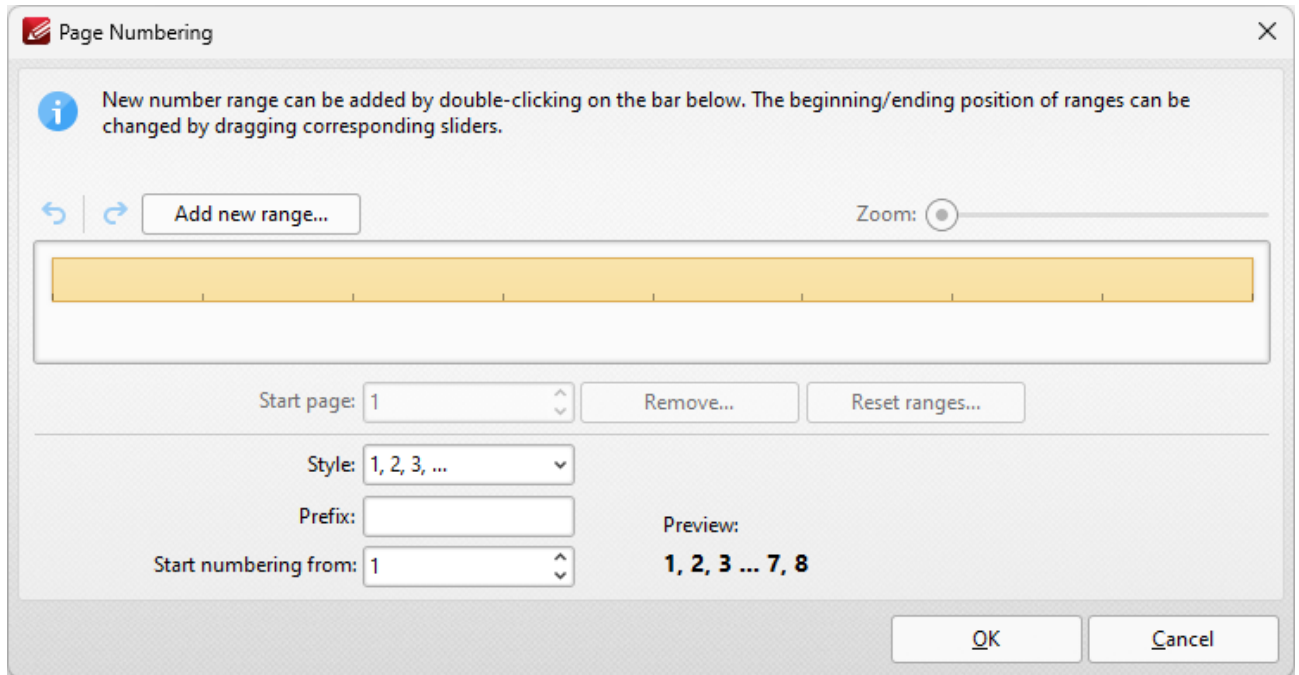
Figure 2. Page Numbering Dialog Box

- Existing page ranges are detailed in the dialog box. Click **Add new range** to add a new page range to the active document. The **Add new range** dialog box will open. Enter the number of the first page in the number box and click **OK** to create the page range.
- Use the sliders detailed in **(figure 2)** to adjust page ranges.
- Click **Remove** to remove the selected page range.
- Click **Reset ranges** to reset all page ranges.
- Use the **Style** menu to set the numbering style of the selected page range.
- Use the **Prefix** box to add a prefix to page numbers in the selected page range.
- Use the **Start numbering from** box to determine the first number of the selected page range.
- Use the arrow icons on the left of the **Add New Range** button to redo/undo operations.

Click **OK** to apply changes.

Number Pages Example

The document detailed below contains a copyright page and a table of contents, which results in a two-page difference between the page numbering of pages in the **Thumbnails** pane and the **Page Navigation** toolbar in comparison to the page numbers of the document:
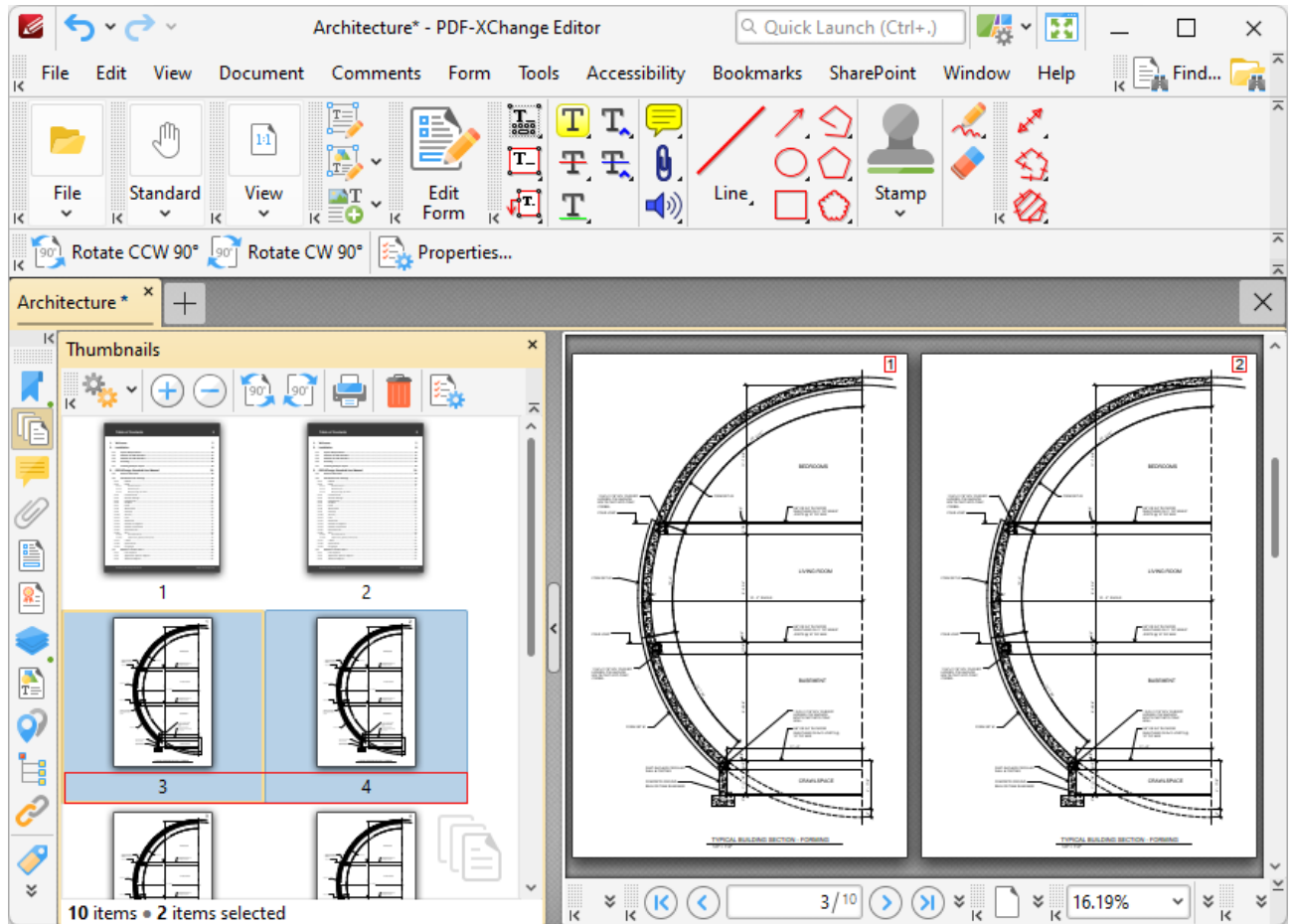
Figure 3. Number Pages Example, Page Number Disparity

Follow the steps below to resolve this issue:

1. Click **Document** in the **Menu Toolbar,** then hover over **More for Pages** and click **Number Pages:**
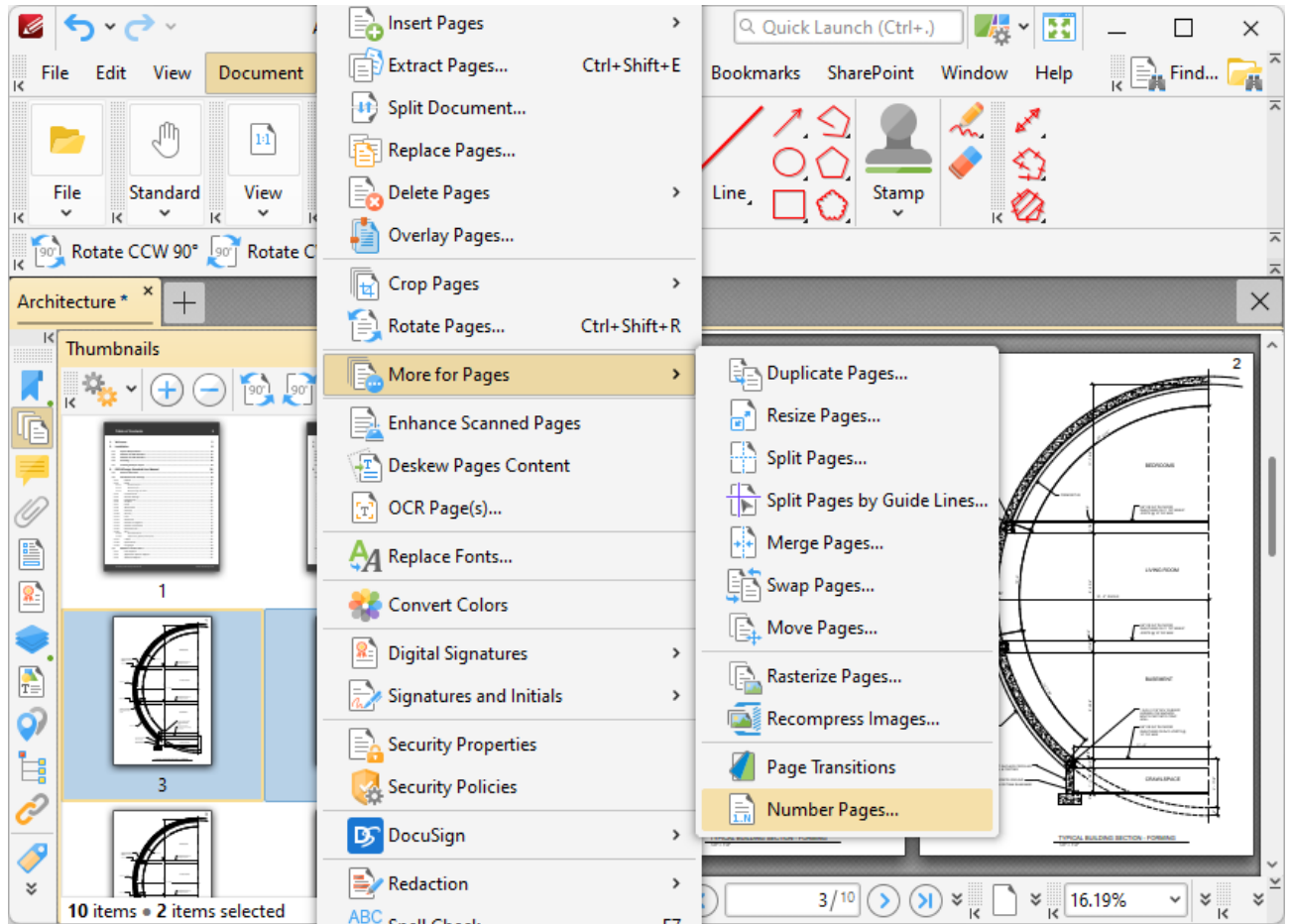
Figure 4. Number Pages Example, More for Pages Submenu, Number Pages

The **Page Numbering** dialog box will open.

2. Click **Add new range.** The **Add New Range** dialog box will open:
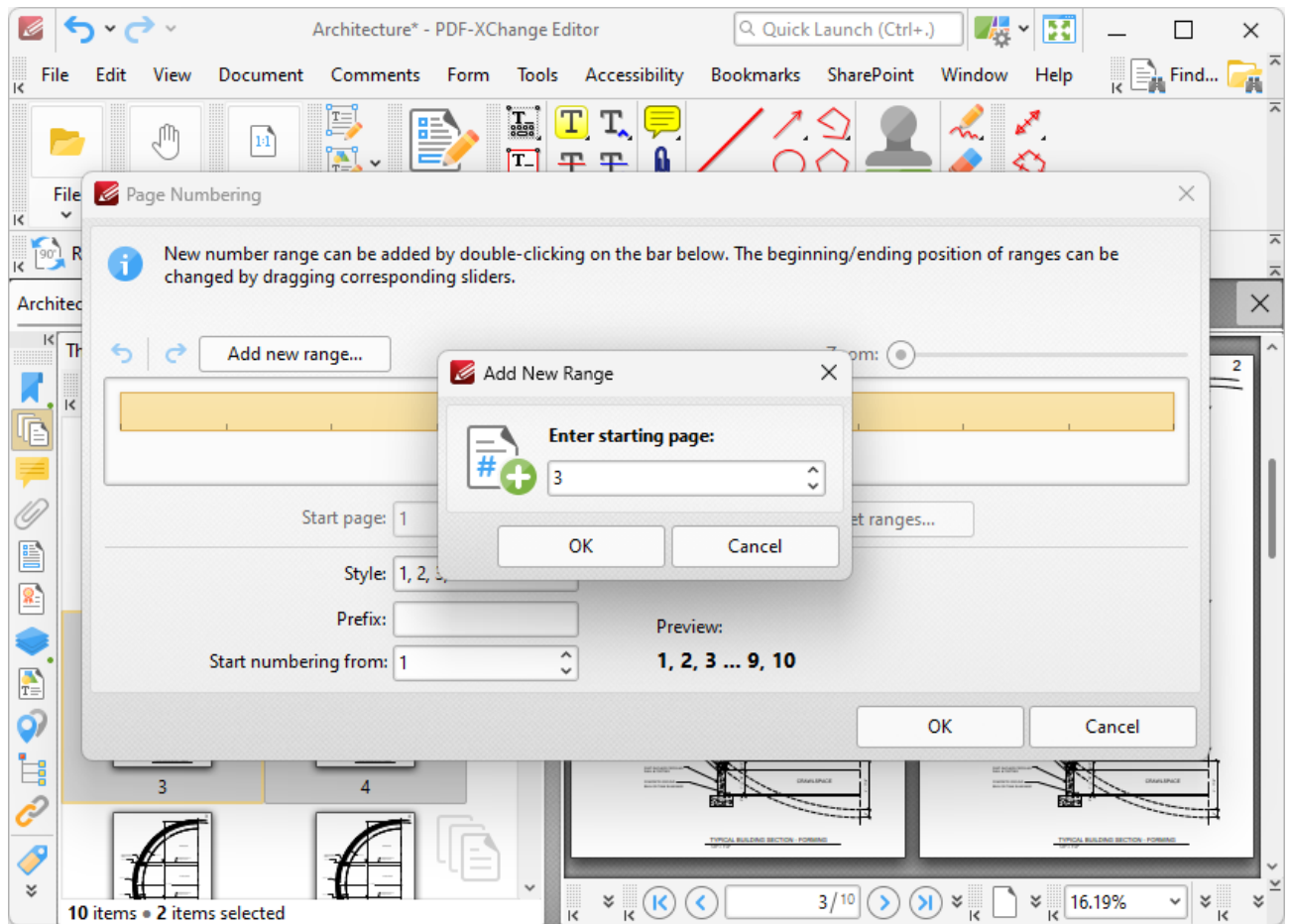
Figure 5. Page Numbering Dialog Box

3. Enter the desired starting page for the new range. (Note that the issue detailed above requires page three to be the first page of the new range).

4. Click **OK** in the **Add New Range** and **Page Numbering** dialog boxes.

5. Click **Edit** in the **Menu Toolbar,** then click **Preferences:**
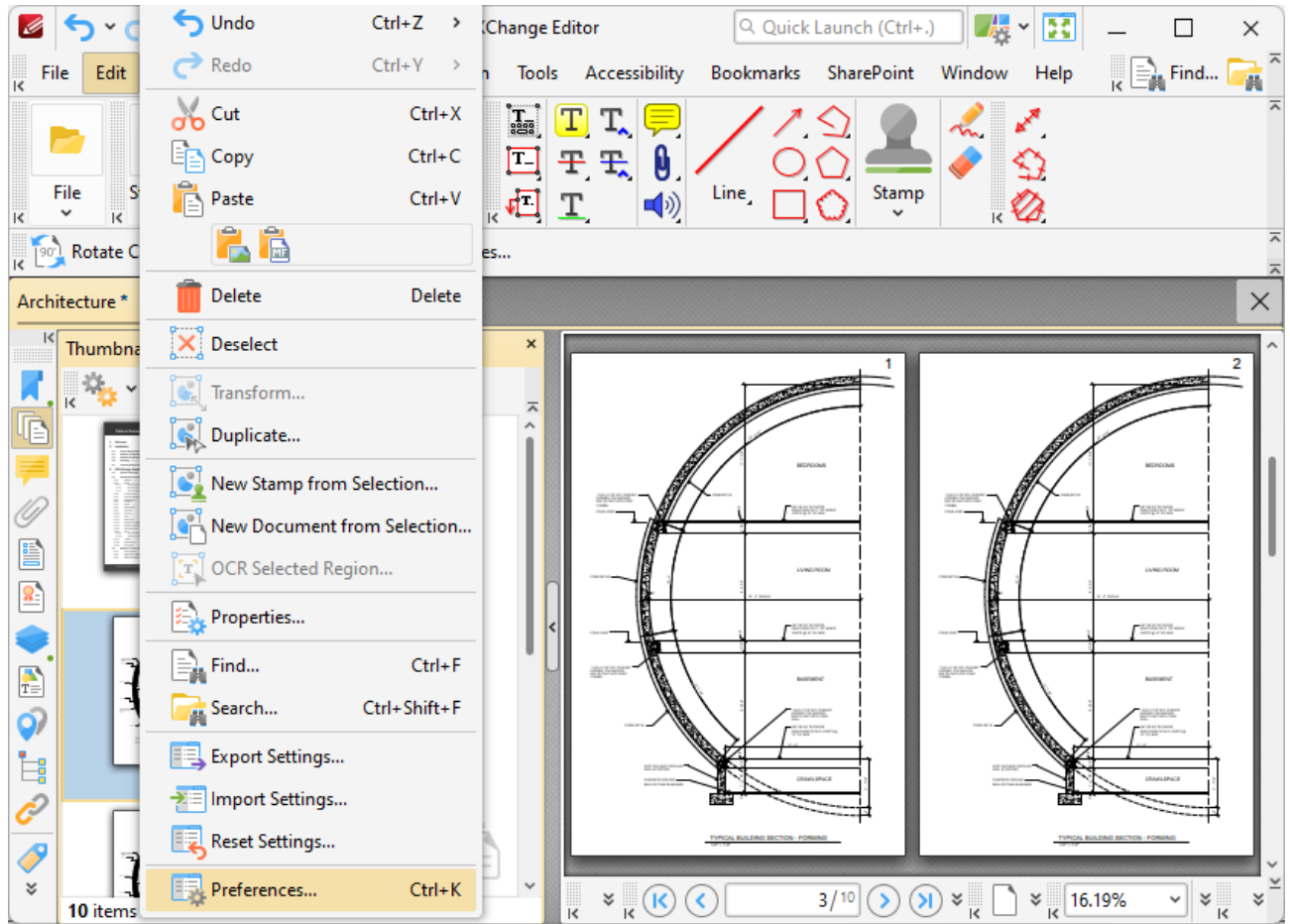
Figure 6. Edit Tab Submenu, Preferences.

The **Preferences** dialog box will open.

6. Click **Page Display** in the **Categories** menu, then select the **Use logical page numbers** box:
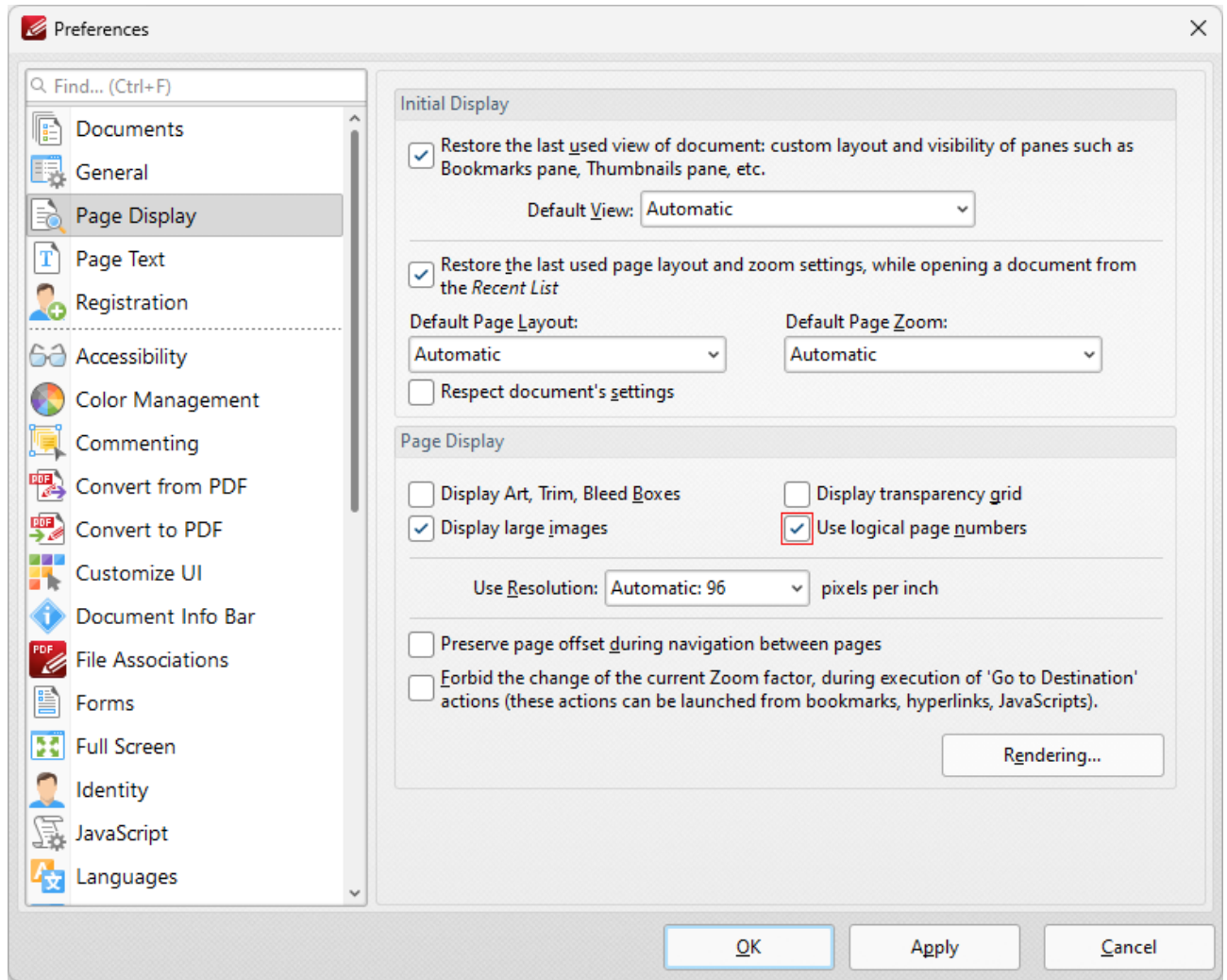
Figure 7. Page Display Preferences, Use Logical Page Numbers Highlighted

    7. Click **Apply** and then click **OK.**

The page numbering of pages in the **Thumbnails** pane and the **Page Navigation** toolbar will then match the page numbering of the main document:
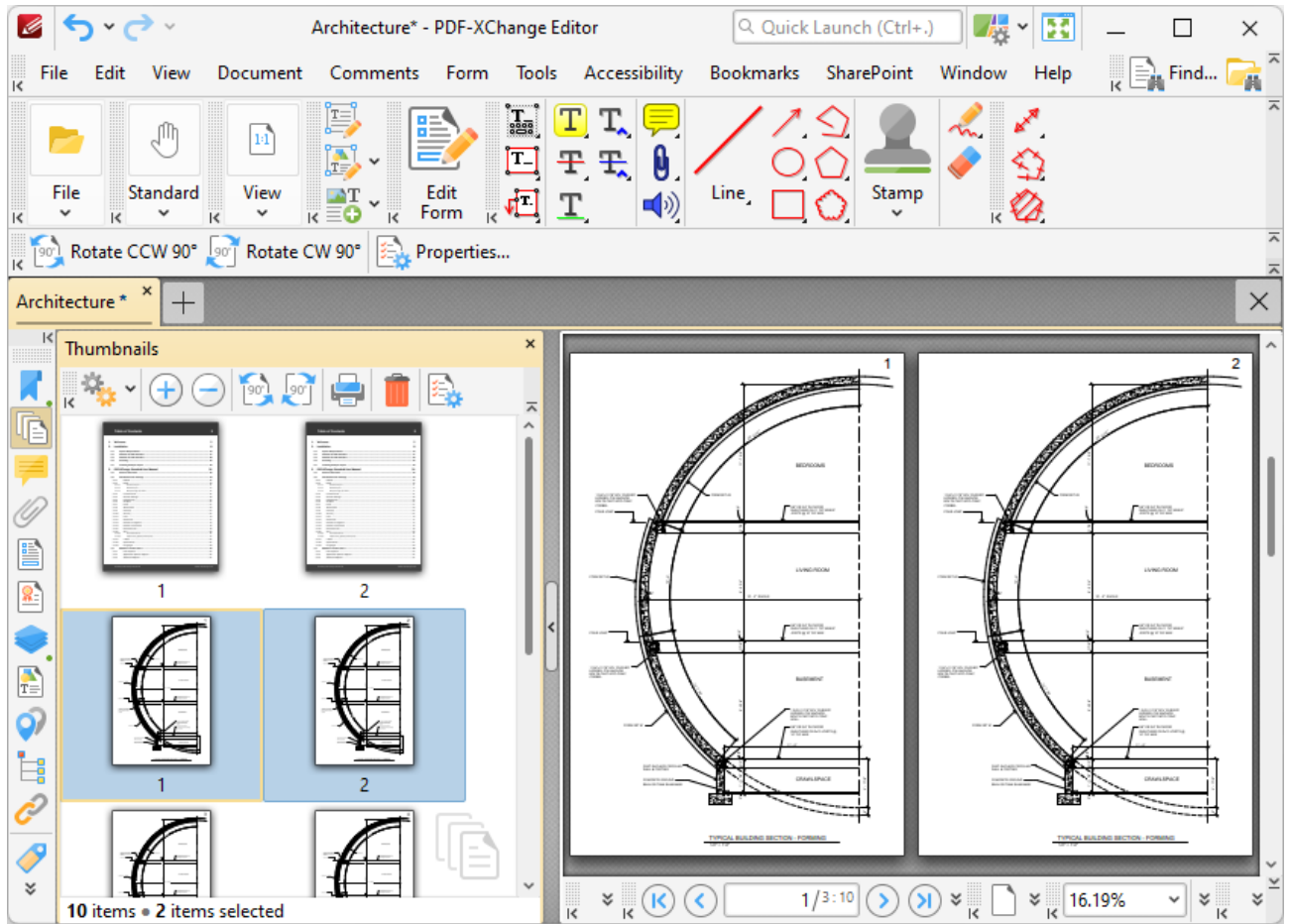
Figure 8. New Page Range

Note that the physical page numbers are also displayed in the **Page Navigation** toolbar. Additionally, the copyright and table of contents pages retain their existing page numbering. If desired, this can be adjusted as follows:

1. Click **Document** in the **Menu Toolbar,** then hover over **More for Pages** and click **Number Pages:**
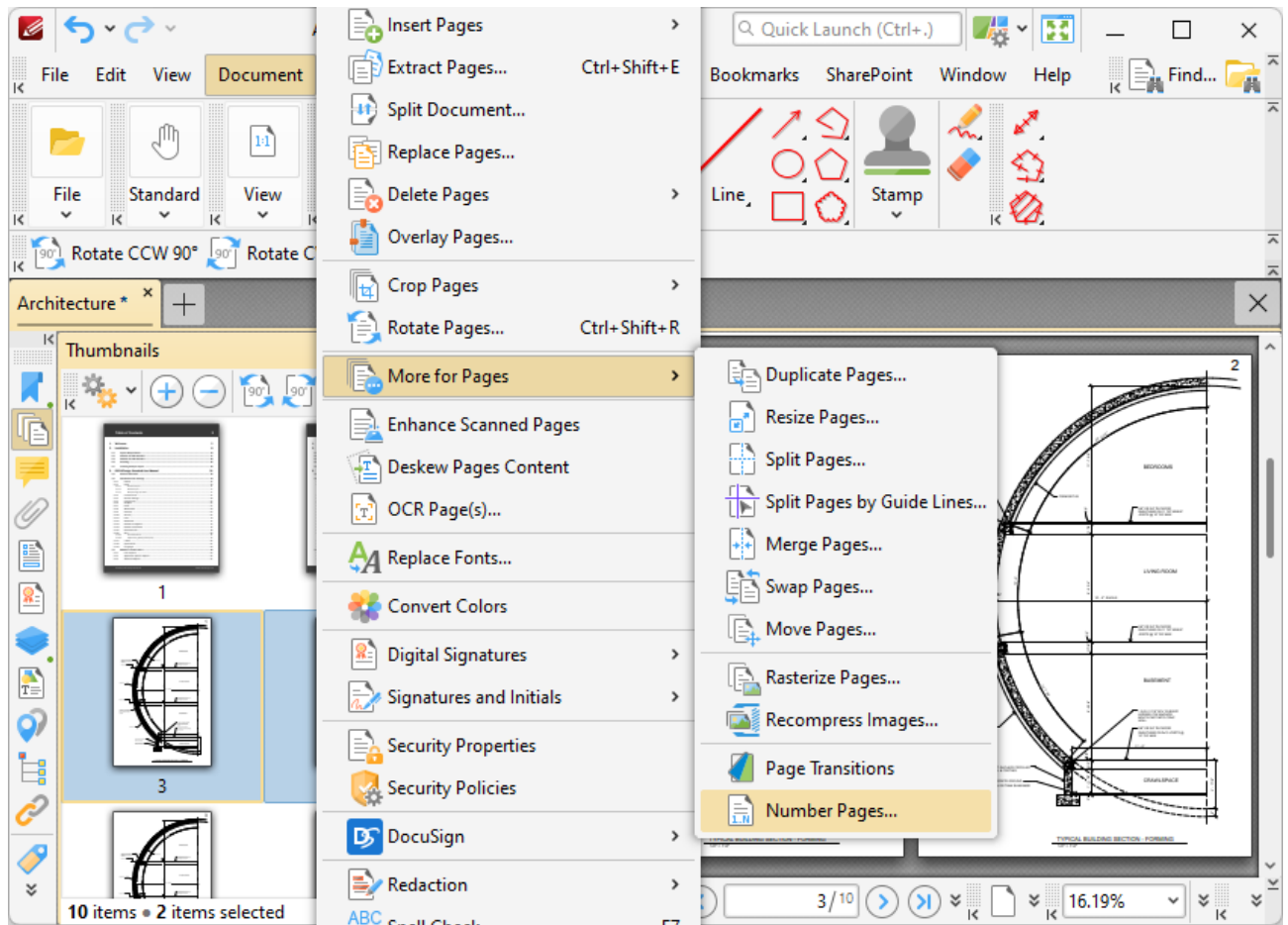
Figure 9. Document Tab, More for Pages Submenu, Number Pages

The **Page Numbering** dialog box will open.

2. Click the page range that contains the copyright and table of contents pages, then click the **Style** dropdown menu and select a new style, such as Roman numerals:
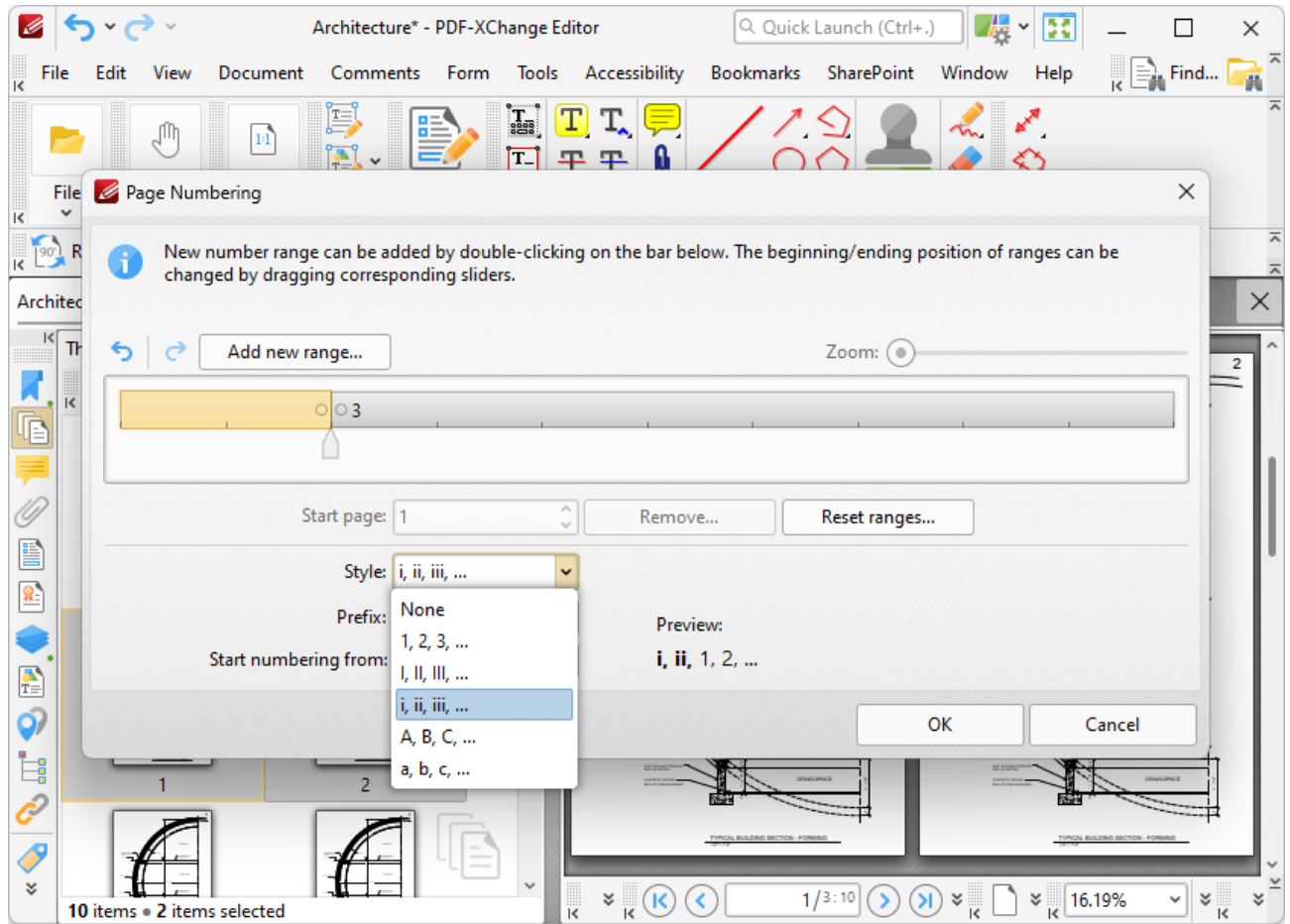
Figure 10. Page Numbering Dialog Box, Roman Numerals Selected

3. Click **OK.** The process is then complete:
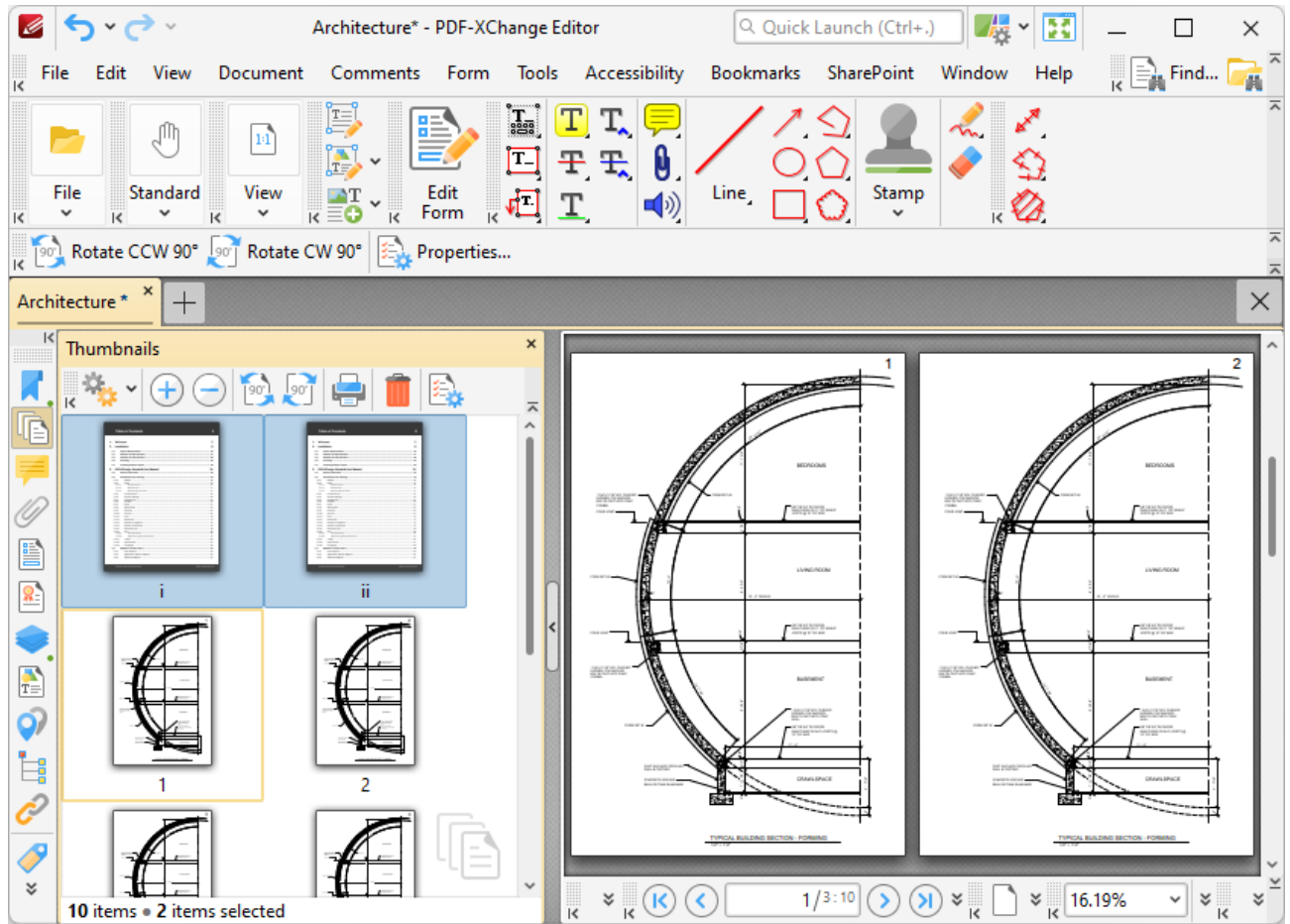
Figure 11. Number Pages Process Complete

5.4.14   Enhance Scanned Pages

Enhance Scanned Pages

Click **Enhance Scanned Pages** to enhance the quality of scanned pages:
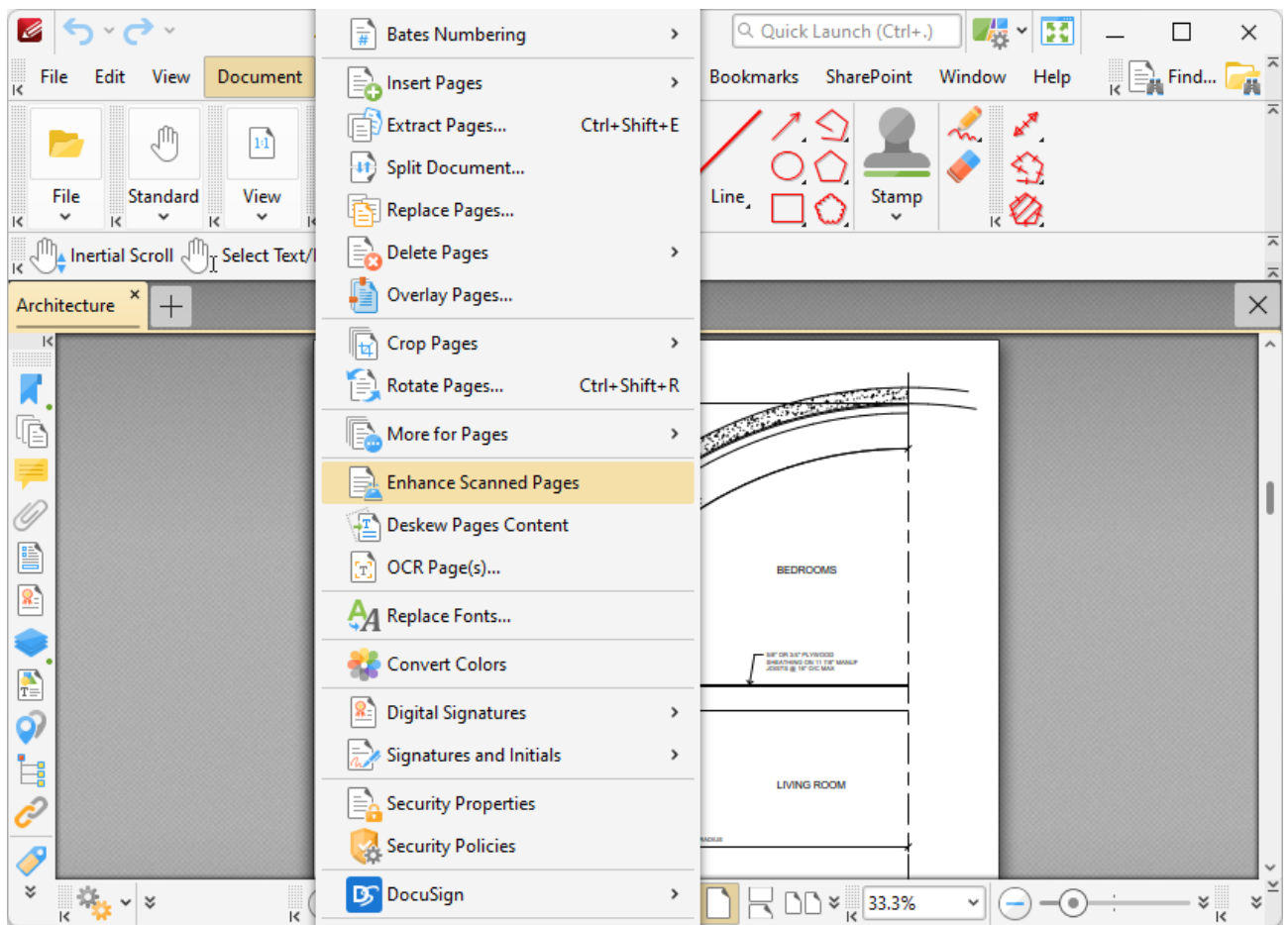
Figure 1. Document Tab Submenu, Enhance Scanned Pages

The **Enhance Scanned Pages** dialog box will open:
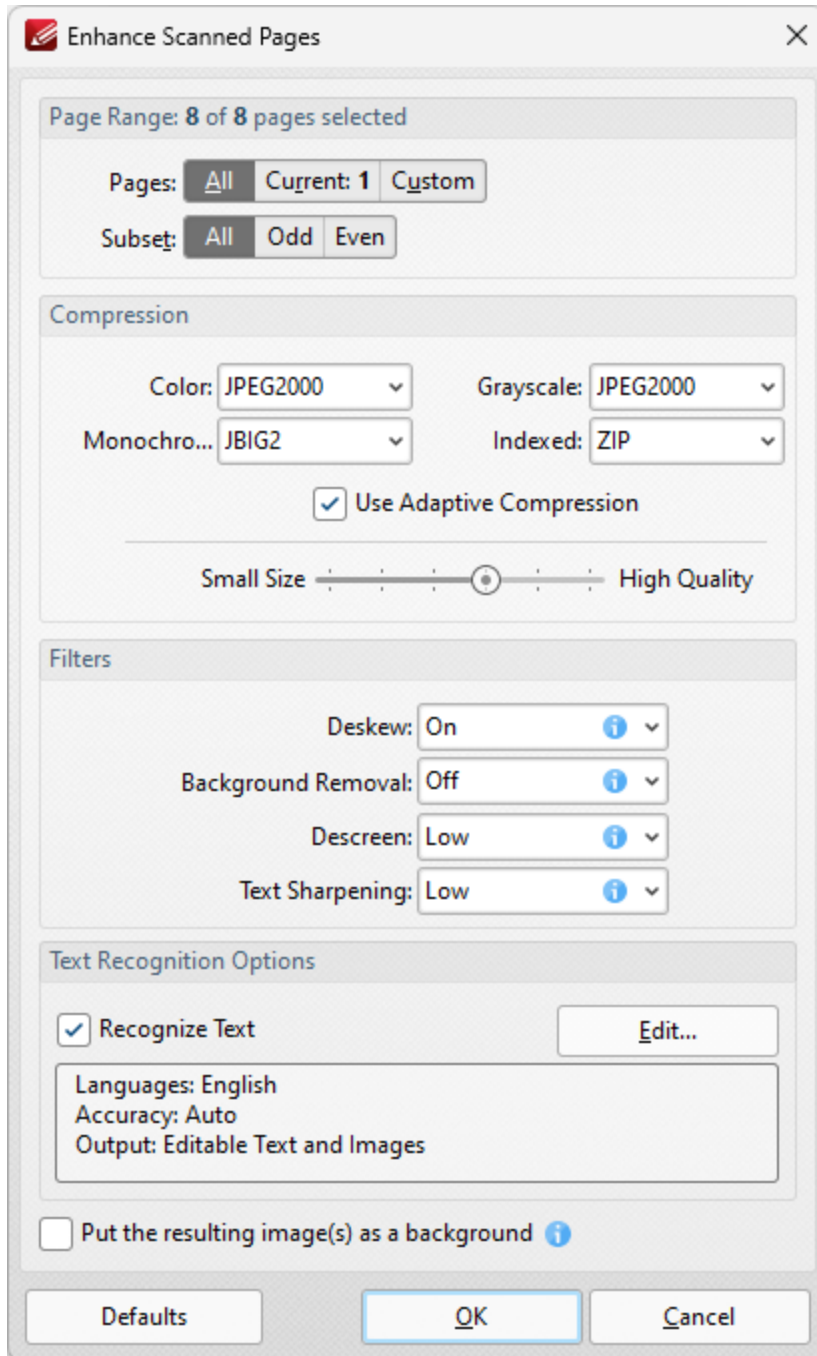
Figure 2. Enhance Scanned Pages Dialog Box

- Use the **Page Range** options to determine the page range of pages to be enhanced:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274

- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Use the **Color/Grayscale, Monochrome, Grayscale** and **Indexed** dropdown menus to determine the type of compression for these formats.
- Select/clear the **Apply Adaptive Compression** box as desired.
- Use the slider to select between **Small Size** and **High Quality** as desired.
- Use the **Filters** dropdown menus to set options for deskewing, background removal, descreening and text sharpening as desired.
- Select the **Recognize Text** box to perform **OCR** on the pages.
- Click **Edit** to change the language and/or accuracy of the OCR operation. Note than increasing the accuracy will also increase the time taken to perform the operation and vice versa. Note that two optical character recognition engines are available in **PDF-Exchange Editor:** the **Default** OCR engine and the **Enhanced** OCR engine, which is available when **PDF-Exchange Editor Plus** is purchased (either as a stand-alone product or as part of the **PDF-XChange PRO** bundle). The **Enhanced** OCR engine is faster, more accurate and more dynamic than the default OCR engine, and it also contains some extra features. Further information about the **Enhanced** OCR engine is available **here.** The differences between these engines are detailed **here.** 725

Click **OK** to enhance pages.

5.4.15 **Deskew Pages Content**

Deskew Pages Content

Click **Deskew Pages Content** to deskew document pages:
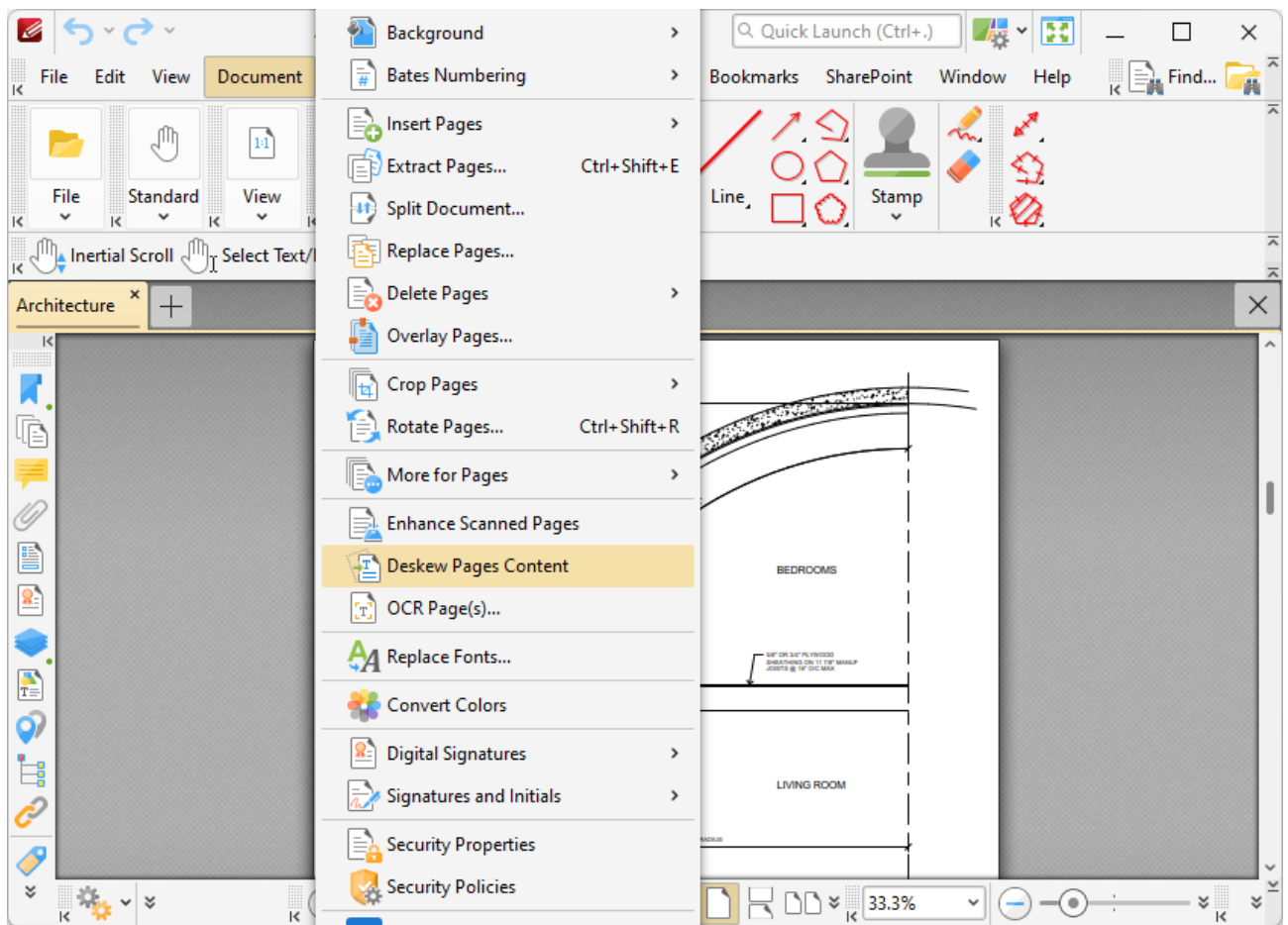
Figure 1. Document Tab Submenu, Deskew Pages Content

The **Deskew Pages** feature is intended for use in cases where documents have been scanned crookedly. It is used to straighten the edges of these documents. When it is selected, the following dialog box will open:
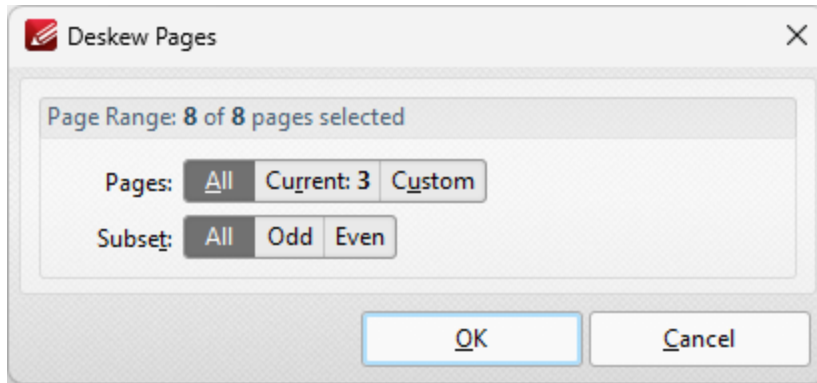
Figure 2. Deskew Pages Dialog Box

- Use the **Page Range** options to determine the page range of pages to be deskewed:
    - Select **All** to specify all pages.
    - Select **Current** to specify only the current page.
    - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
    - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Click **OK** to deskew pages.

5.4.16 OCR Pages

OCR Pages

Click **OCR Pages** to perform optical character recognition on documents:
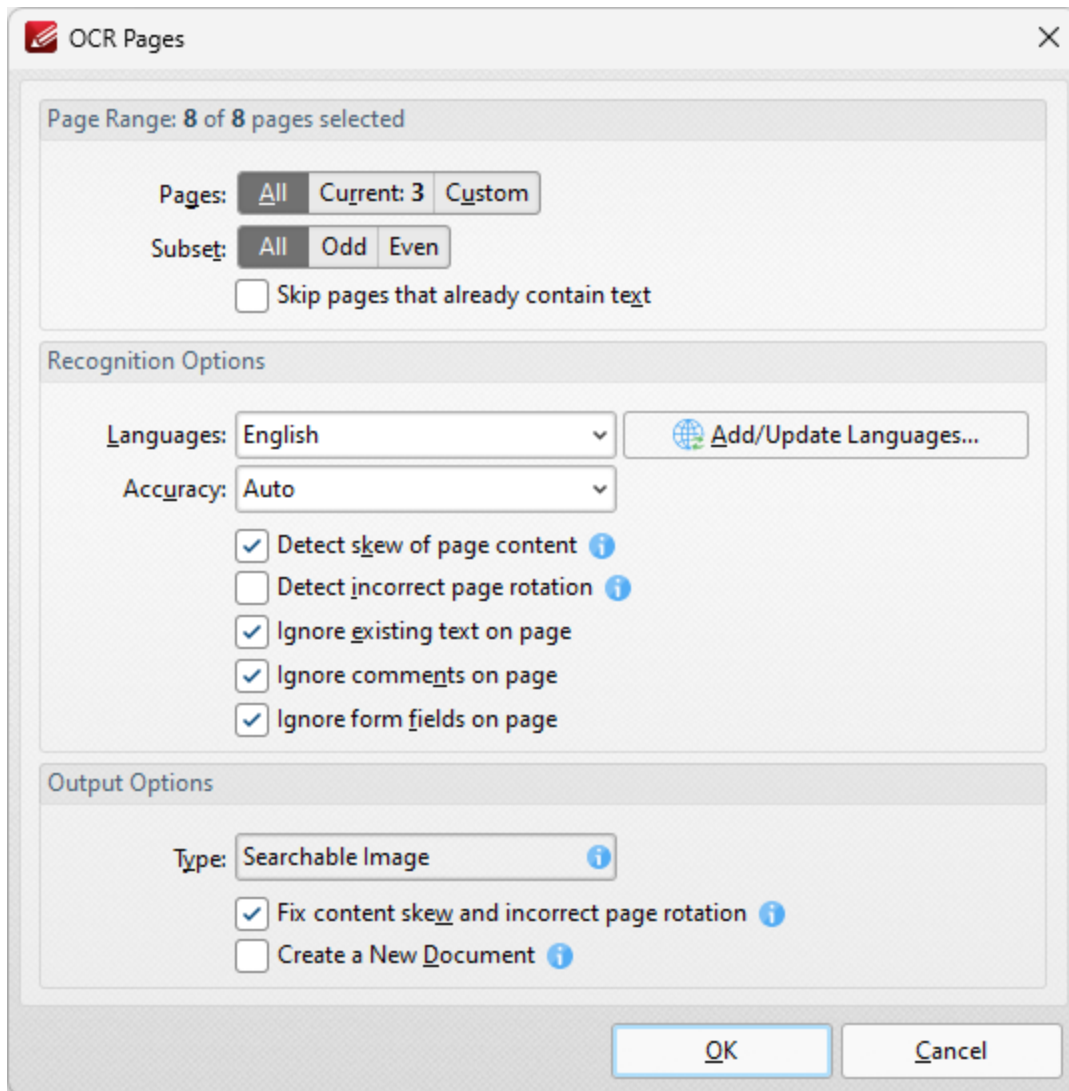
Figure 1. Document Tab Submenu, OCR Pages

Note that two optical character recognition engines are available in **PDF-Exchange Editor:** the **Default** OCR engine and the **Enhanced** OCR engine, which is available when **PDF-Exchange Editor Plus** is purchased (either as a stand-alone product or as part of the **PDF-XChange PRO** bundle). The **Enhanced** OCR engine is faster, more accurate and more dynamic than the default OCR engine, and it also contains some extra features. Further information about the **Enhanced** OCR engine is available **here.** You can use the **OCR Preferences** (available via the **Preferences** option in the **File** tab) to switch between default and enhanced OCR:
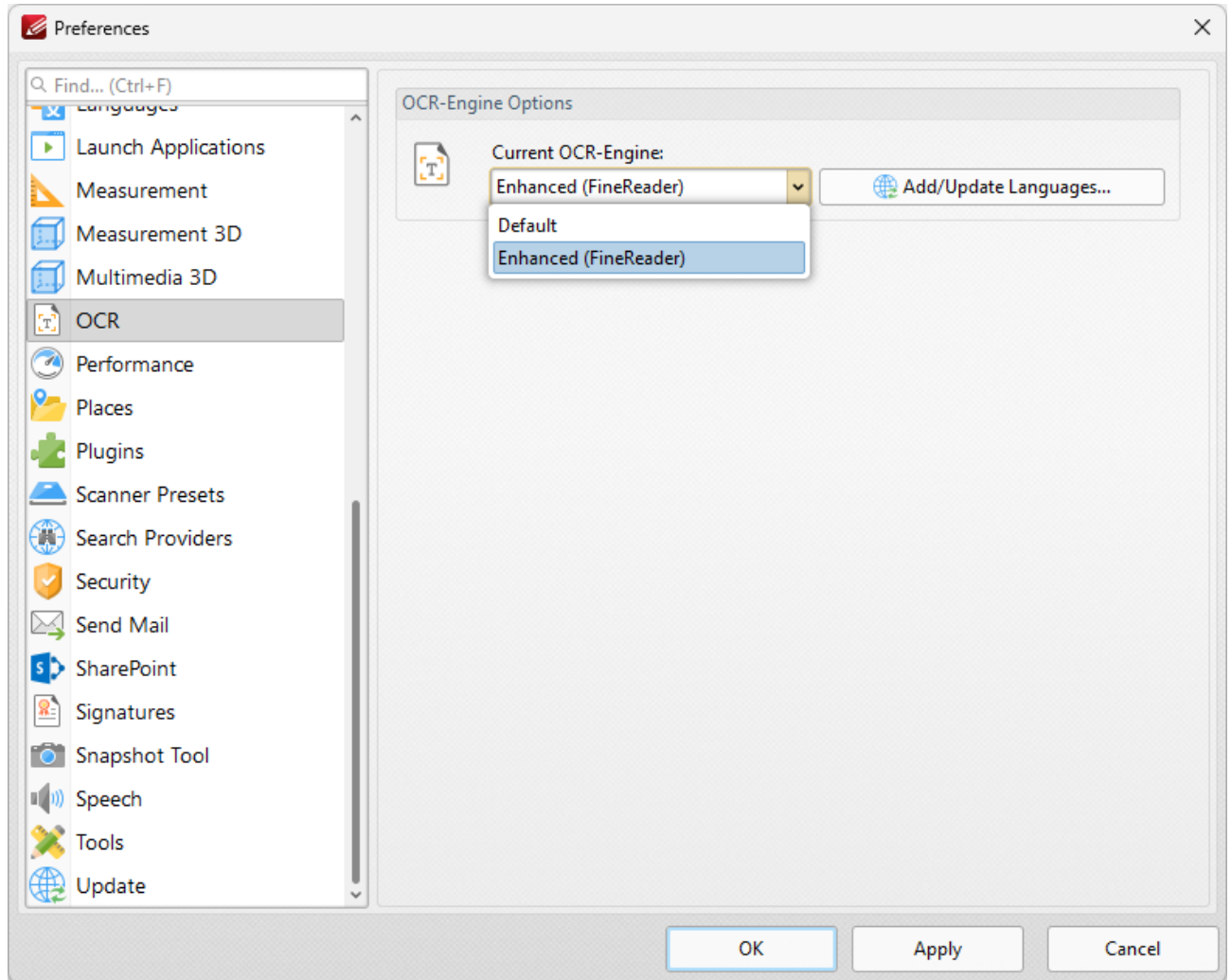
Figure 2. Preferences Dialog Box, OCR Category, OCR Engine Dropdown Menu

Default OCR Engine

The default engine's OCR process in **PDF-XChange Editor** analyzes image-based documents, recognizes text and then places a duplicate, invisible text layer over it, which makes the source text selectable and searchable in the same manner as ordinary text. When this option is selected the **OCR Pages** dialog box will open:
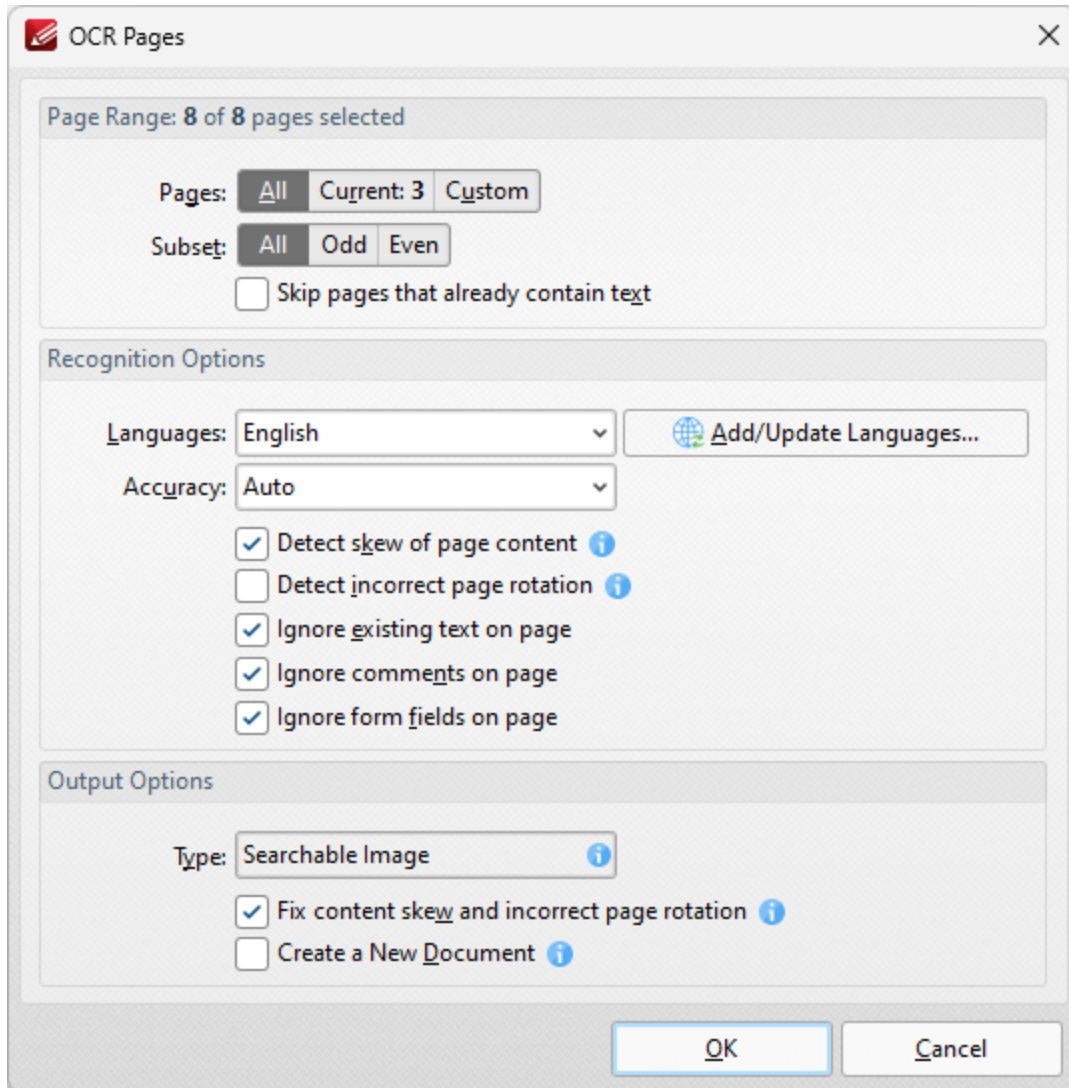
Figure 3. OCR Pages Dialog Box

- Use the **Page Range** options to determine the page range of pages for OCR:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** [1274]
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.

Use the **Recognition Options** to determine the language and accuracy of the OCR process. Please note that increasing the accuracy also increases the time that the process takes and vice versa. Additionally, it should be noted that setting the accuracy to high may result in unusual output if the document contains imperfections. This is because the software will search to a greater depth and may attempt to

recognize imperfections as text. Click **Add/Update Languages** to add/update the language packs used for OCR.

- Select the **Detect skew of page content** box to enable automatic detection of skewed pages, which happens when documents are scanned crookedly.
- Select the **Detect incorrect page rotation** box to enable the automatic detection of incorrect page rotation in documents.
- Select the **Ignore existing text on page** box to omit existing text from the process of optical character recognition.
- Select the **Ignore comments on page** box to omit comments from the process of optical character recognition.
- Select the **Ignore form fields on page** box to omit form fields from the process of optical character recognition.

Use the **Output Options** to determine the format and quality of output from the OCR process:

- Select the **Fix content skew and incorrect page rotation** box to deskew pages that are scanned crookedly and auto-correct page rotation issues.
- Select the **Create a New Document** box to create a new document for the output of the optical character recognition. If this box is not selected, then the original document will be updated with the output instead.

Click **OK** to OCR documents.

Enhanced OCR Engine

The **Enhanced OCR** dialog box appears as detailed below:
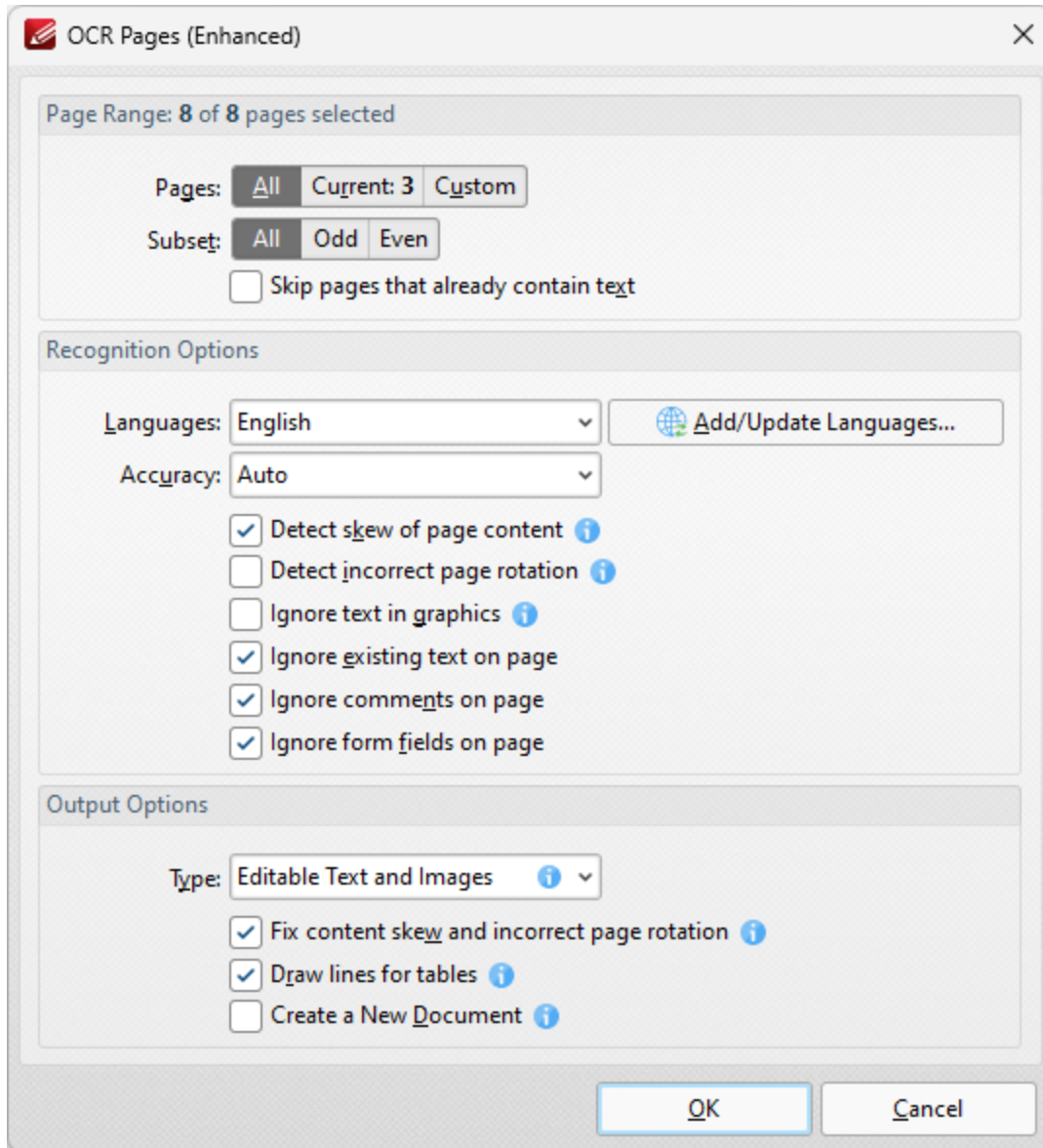
Figure 4. OCR Pages (Enhanced) Dialog Box

The options in this dialog box are the same as those detailed in *(figure 3)* but with additional **Output Options:**

- Select **Searchable Image** to retain the image-based content on which OCR is performed and insert a duplicate, invisible text layer on the text recognized during the operation. This will make the source text selectable and searchable in the same manner as ordinary text.
- Select **Editable Text and Images** to replace image-based text in source documents with the text recognized in the process of optical character recognition. This will convert image-based text into editable text, and retain existing content such as text and images.
- Select **Fine Page Content** to replace the content of source documents with new content that contains only the text and images recognized during optical character recognition.

- Select the **Draw Lines for tables** box to replace recognized column/row lines in tables with editable vector lines in output documents.

Please note that in some cases (for example documents that contain one large graphic zone that takes up the whole page area and has some text zones over it) the visual output for **Editable Text and Images** and **Fine Page Content** will be very similar.

Click **OK** to OCR documents.

OCR Selected Region

It is also possible to perform OCR on selected regions of documents. This is possible after either the **Snapshot Tool** 305 or the **Crop Page Tool** 676 has been used to define a page area, and the option is available in the right-click shortcut menu. For example, click **Standard,** then click the **Snapshot Tool** and click and drag the mouse to define a snapshot area:
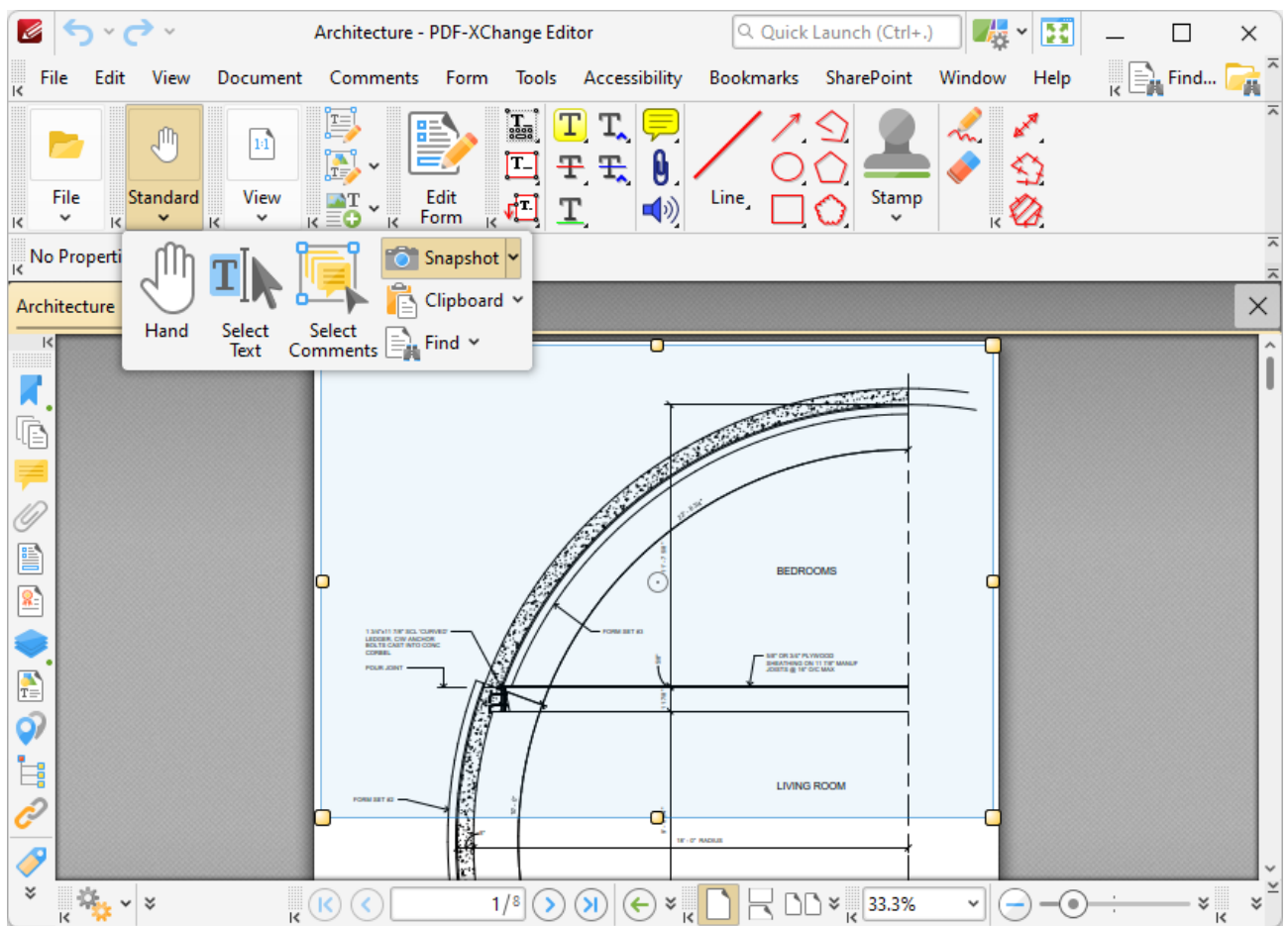
Figure 5. Active Snapshot Tool

When the area has been defined, right-click it and then click **OCR Selected Region** in the shortcut menu:
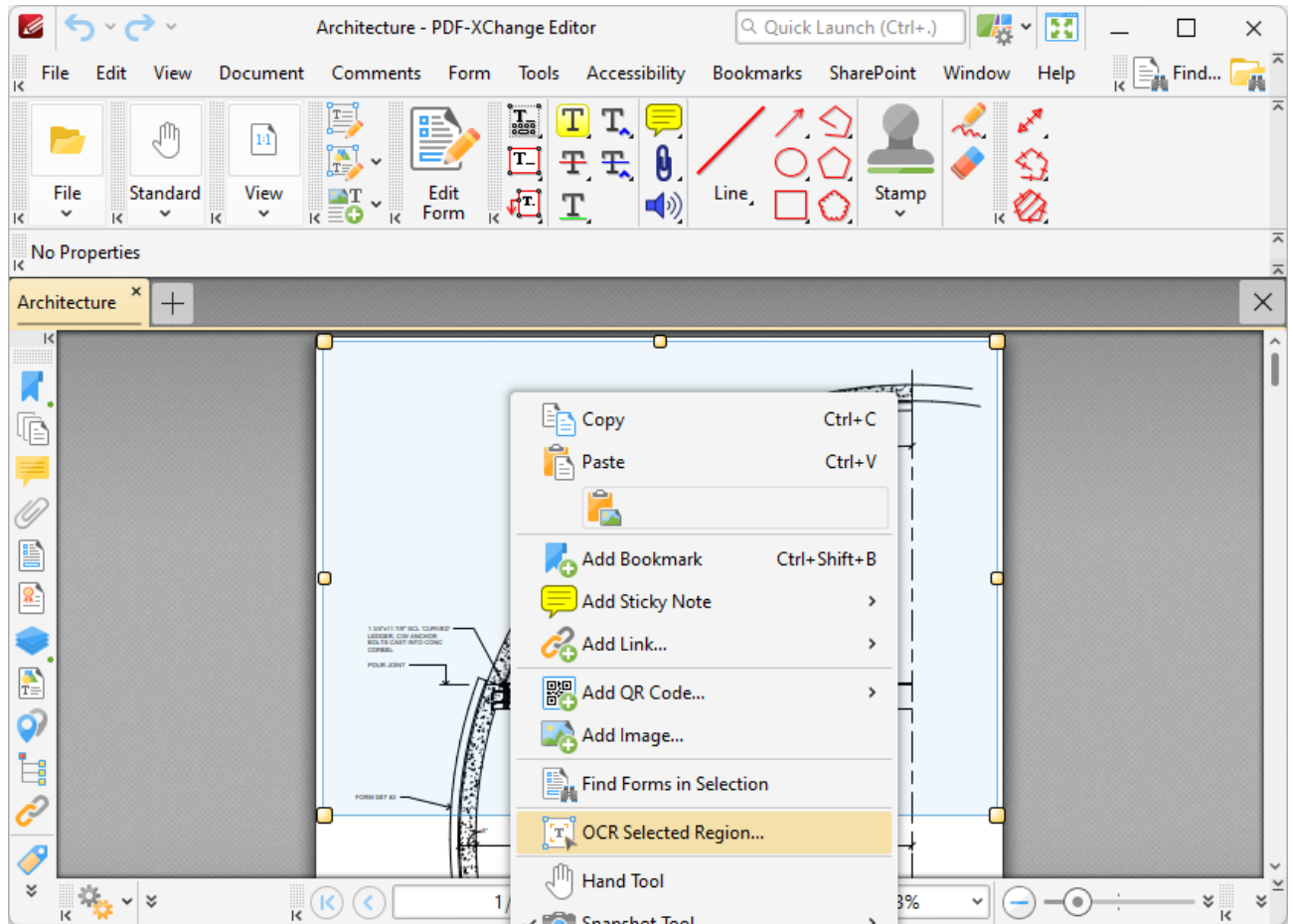
Figure 6. Right-Click Shortcut Menu, OCR Selected Region Highlighted

The **OCR Options** dialog box will open. Determine parameters as detailed above and then click **OK** to perform OCR on only the selected region in the document.

5.4.17   Replace Fonts

Replace Fonts

Click **Replace Fonts** to replace document fonts:
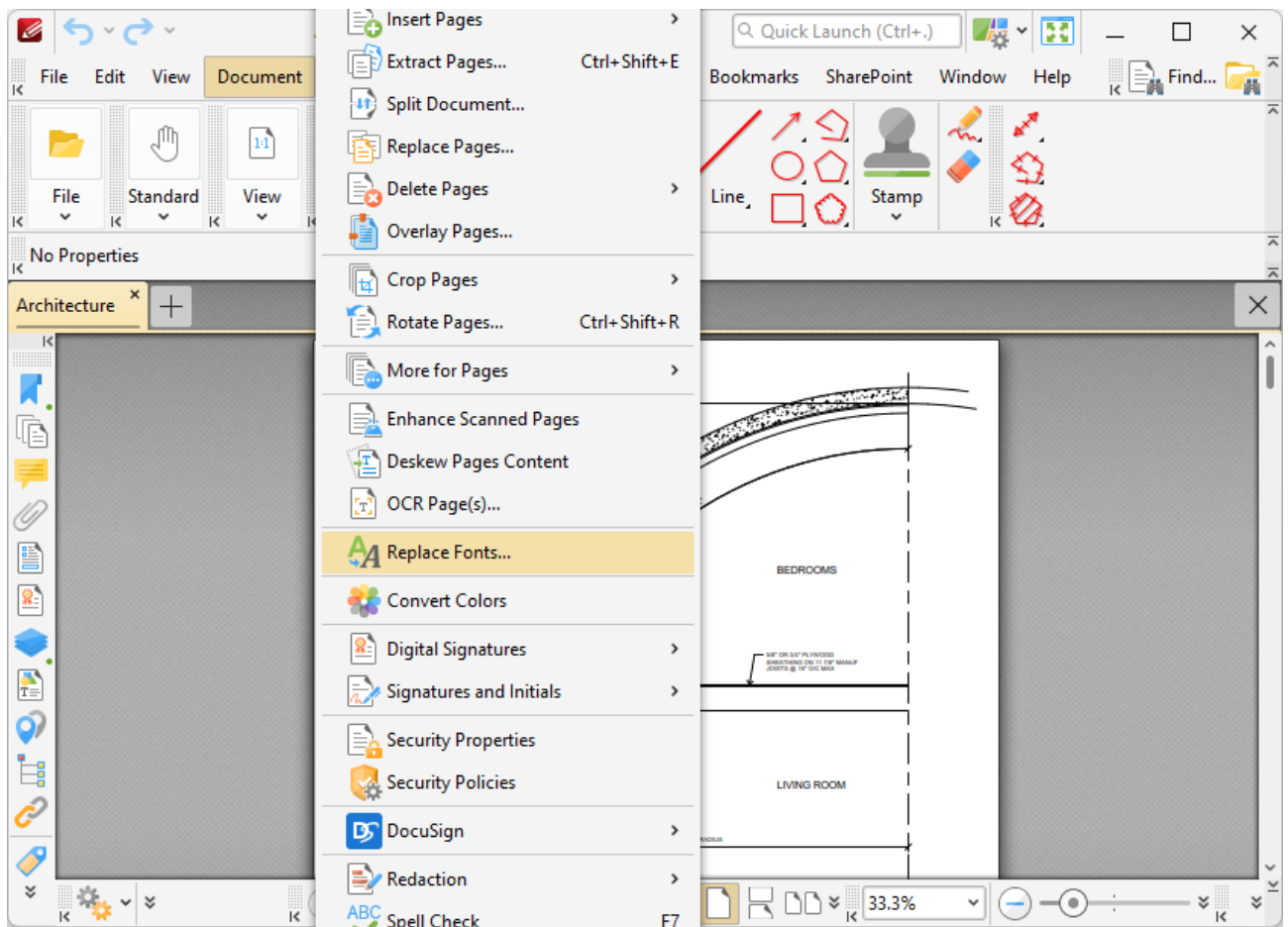
Figure 1. Document Tab Submenu, Replace Fonts

The **Replace Fonts** dialog box will open:
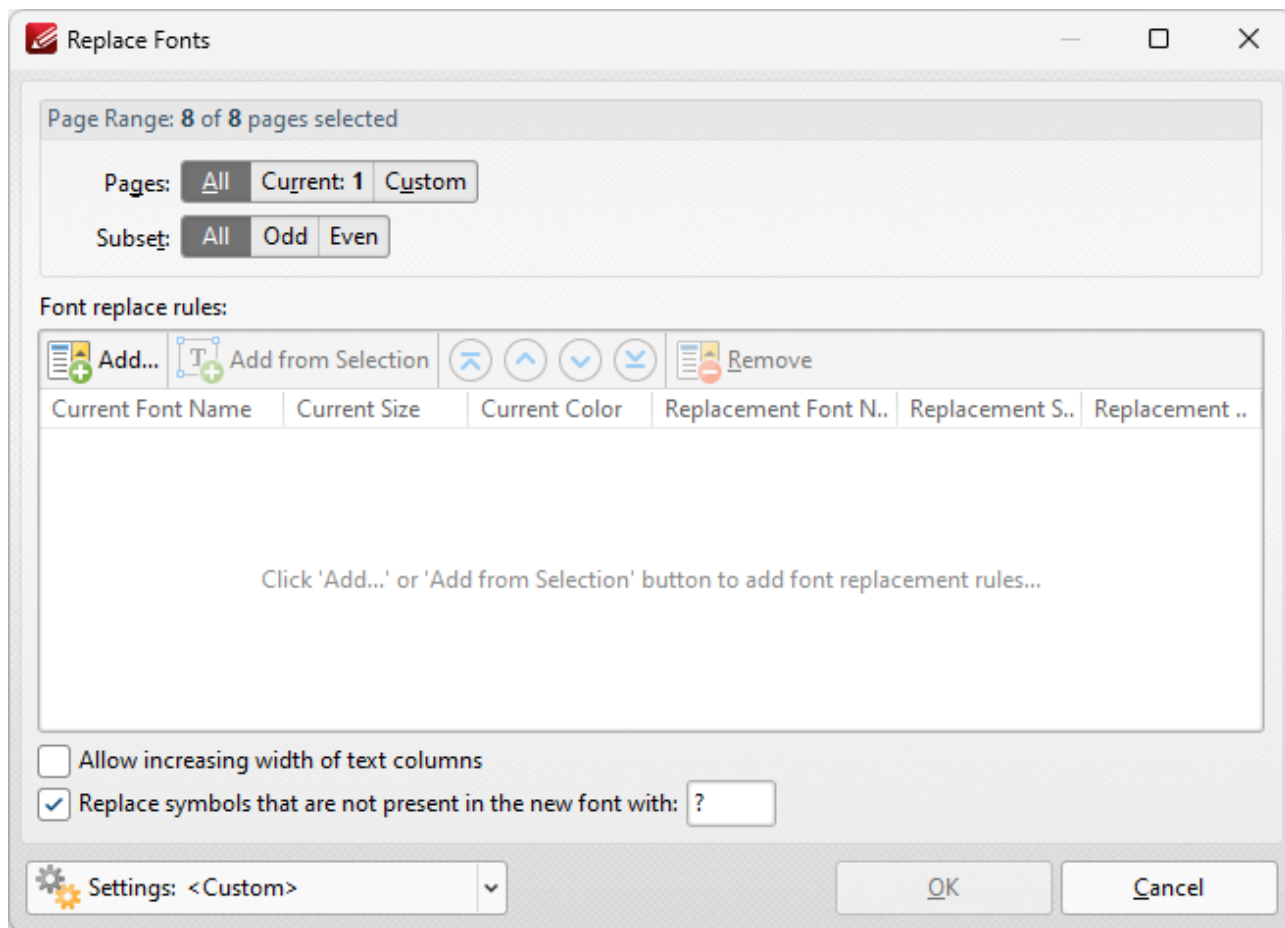
Figure 2. Replace Fonts Dialog Box

- Use the **Page Range** options to determine the page range for replaced fonts:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.
  - Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
  - Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Use the **Subset** option to specify a subset of pages.
- Click **Add** to add a new font to be replaced. The **Add Rule(s)** dialog box will open, as detailed in *(figure 3).*
- Click **Add from Selection** to add text currently selected in the document as the template for text to be replaced in the document. Note that text must be selected with the **Select Text Tool** 824 in order for this feature to operate.
- Use the arrow buttons to move items up or down in the list, and use the **Remove** feature to remove items from the list.
- Select the **Allow increasing width of text columns** box to allow the width of columns of text to become wider when you are increasing the size of fonts.

- Select the **Replace symbols that are not present in the new font** box to replace symbols that are present in the current font but absent in the replacement font, then enter the desired font in the text box.
- Click **Settings** to manage saved custom settings. The **Manage Presets** dialog box will open, as detailed in *(figure 4).*

Click **OK** to replace fonts.
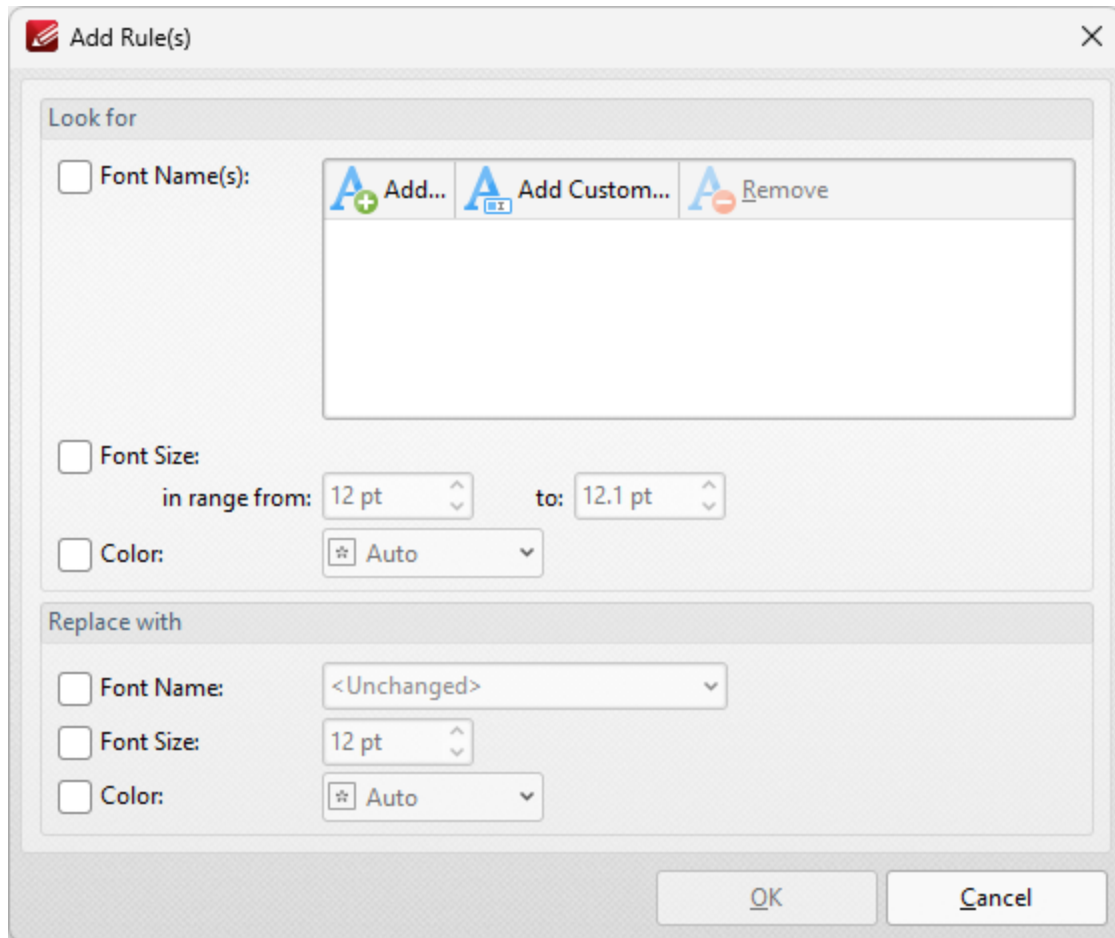
Figure 3. Add Rules Dialog Box

- Select the **Font Names** box to specify fonts to be replaced in the document. Click **Add** to add existing fonts in the document, or click **Add Custom** to add custom fonts. Note that you can leave the **Font Names** box unchecked if you want to specify only all fonts within a size and/or color range, and then use the settings below to specify the desired parameters.
- Select the **Font Size** box to specify the size range of fonts to be replaced.
- Select the **Color** box to specify the color of fonts to be replaced.
- Use the **Replace with** check boxes to specify the **Font Name, Size** and **Color** that you want to use to replace the text in the document.

Click **OK** to save changes.
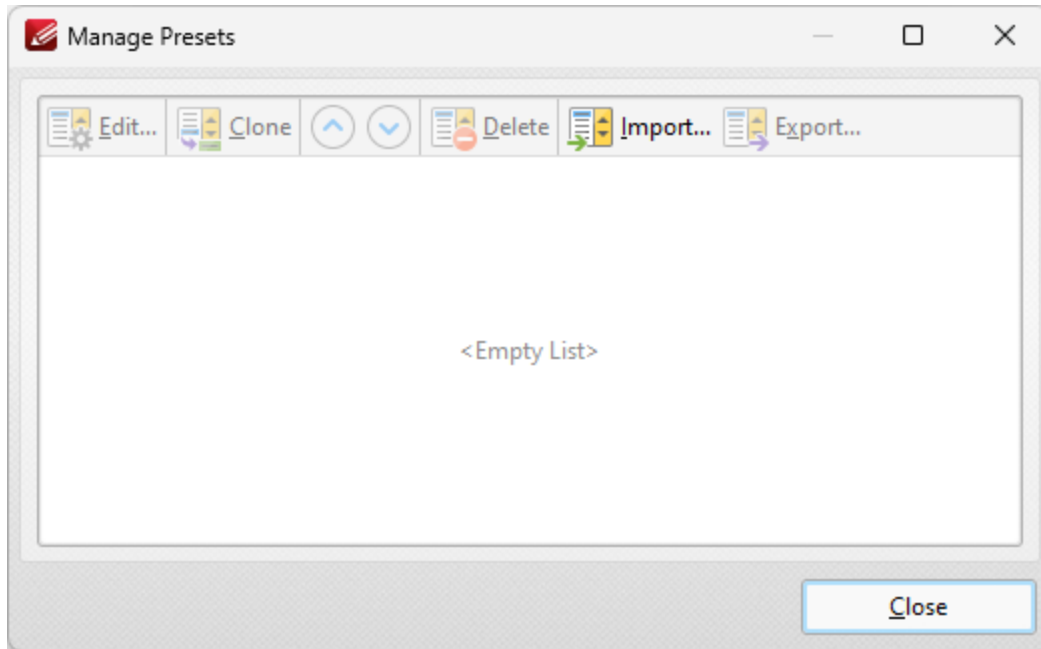
Figure 4. Manage Presets Dialog Box

- Click **Edit** to edit selected profiles.
- Click **Clone** to clone selected profiles. This makes it possible to duplicate profiles and then customize their settings whilst retaining the existing profile and its parameters.
- Use the up/down arrow to move selected profiles up or down in the list.
- Click **Delete** to delete selected profiles.
- Click **Import** to import profiles from a saved file.
- Click **Export** to export profiles to file.

5.4.18   **Convert Colors**

Convert Colors

Click **Convert Colors** to convert document colors:
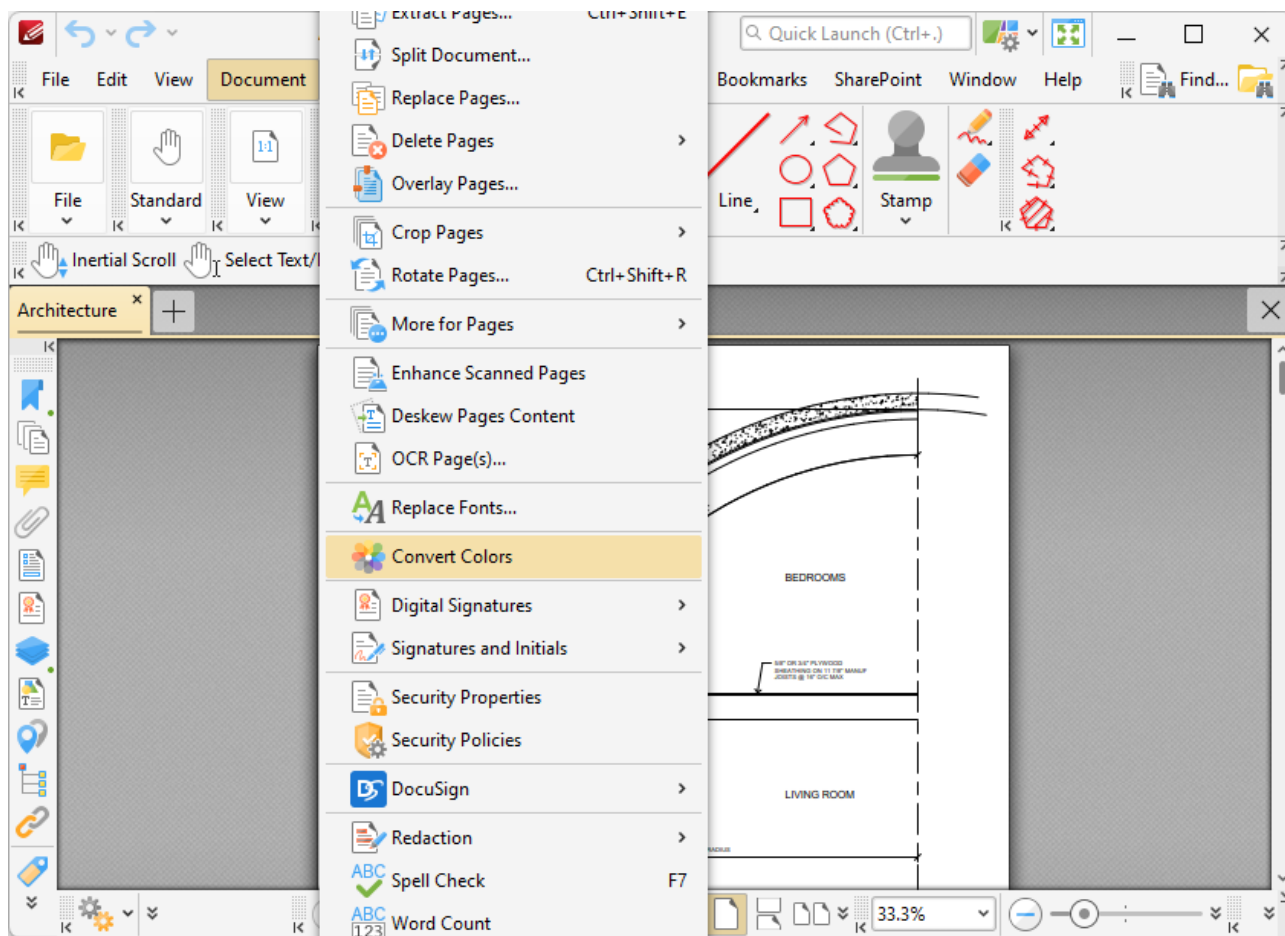
Figure 1. Document Tab Submenu, Convert Colors

The **Convert Colors** dialog box will open:
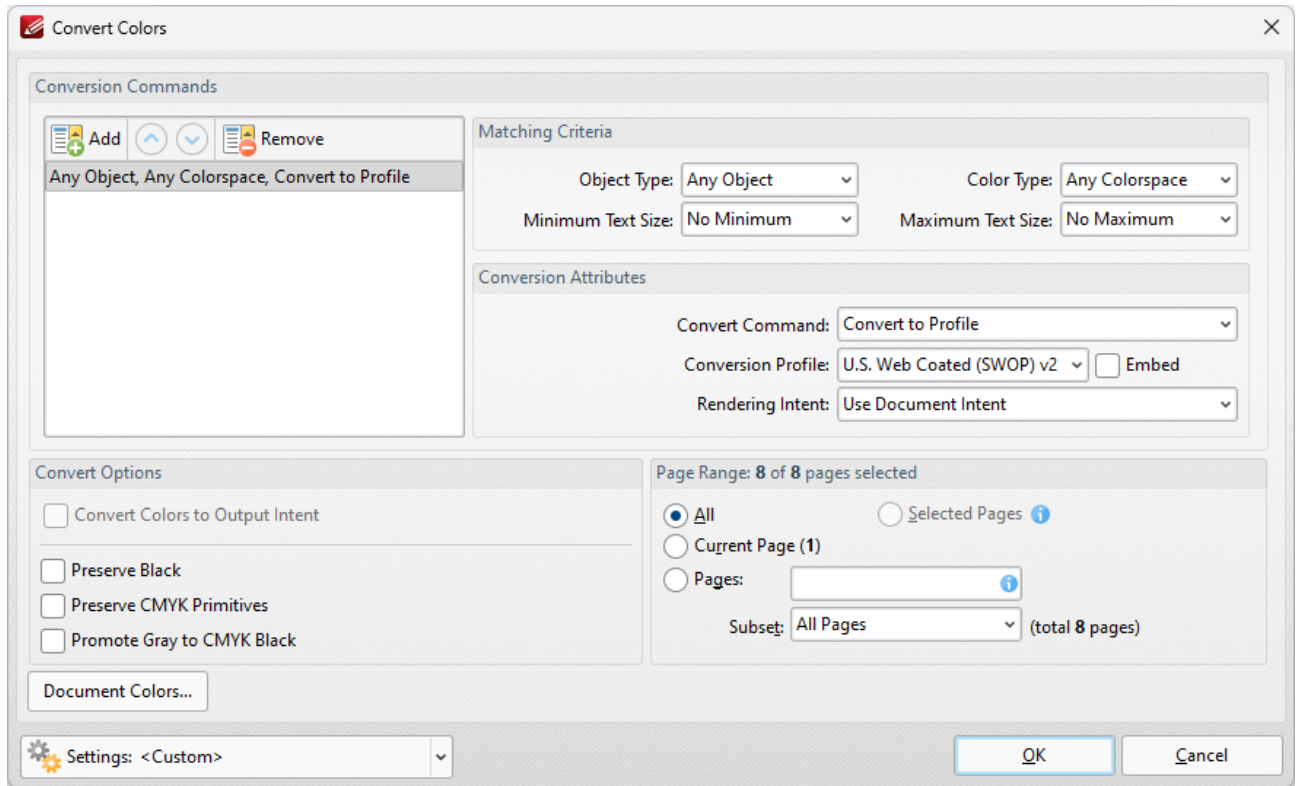
Figure 2. Convert Colors Dialog Box

- The default settings profile for color conversion are available in the pane on the left. If you want to create customized settings for color conversion, then click **Add** and customize the settings as detailed below:
  - Use the **Matching Criteria** section to determine the characteristics of content that will have its color converted:
    - Use the **Object Type** dropdown menu to specify the type of objects that you want to convert.
    - Use the **Color Type** dropdown menu to specify the color space you want to convert.
    - Use the **Minimum/Maximum Text Size** dropdown menus to specify the minimum/maximum size for converted text.
  - Use the **Conversion Attributes** to determine how the colors of objects in the document that meet the **Matching Criteria** are converted:
    - Use the **Convert Command** dropdown menu to determine the conversion operation performed:
      - **Preserve** preserves objects from conversion.
      - **Convert to Profile** converts objects to the destination colorspace using the profile selected in the **Conversion Profile** dropdown menu.
      - **Decalibrate** removes embedded profiles from objects.
    - Use the **Conversion Profile** dropdown menu to determine the profile to which objects are converted. Select the **Embed** box to tag objects with

the selected **ICC** profile to calibrate color, which is useful when PDFs are shared between users on different devices.
- Use the **Rendering Intent** dropdown menu to determine the rendering intent used during color conversion.
- Use the **Convert Options** to determine additional options:
  - Select the **Convert Colors to Output Intent** box to convert document colors to the **Output Intent** specified in the **Rendering Intent** dropdown menu. Note that documents must contain the output intent profile in order for their colors to be converted.
  - Select the **Preserve Black** box to preserve black objects in **CMYK, RGB** or **Grayscale** content of converted documents, for example to prevent **RGB** text from converting into rich black **CMYK** when conversion is performed.
  - Select the **Preserve CMYK Primitives** to preserve colors that contain only one colorant.
  - Select the **Promote Gray to CMYK Black** to convert device gray to CMYK black with only a black component.
- Use the **Page Range** options to determine the page range on which color conversion takes place in input documents. Further information on the specification of page ranges is available **here.** ⌐1274⌐
- Click **Document Colors** to view a breakdown of colors in the current document and determine which colors are converted, as detailed in **(figure 4)** below.
- Click the **Settings** dropdown arrow to save/manage/delete custom settings:
  - Click **Save Current Settings** to save the current settings as a profile for subsequent use.
  - Click **Delete** to delete selected profiles. Note that this option is only available for customized profiles.
  - Click **Manage** to manage preset/customized profiles. The **Manage Presets** dialog box will open:

Figure 3. Manage Presets Dialog Box

- Click **Edit** to edit selected profiles. Note that this option is only available for customized profiles.
- Click **Clone** to clone selected profiles. This option can be used to customize the settings of preset profiles, which cannot be customized in the default state.
- Use the up and down arrows to move selected profiles up or down in the list.
- Click **Delete** to delete selected profiles. Note that this option is only available for customized profiles.
- Click **Import** to import profiles from a saved file.
- Click **Export** to export profiles to file.

Document Colors
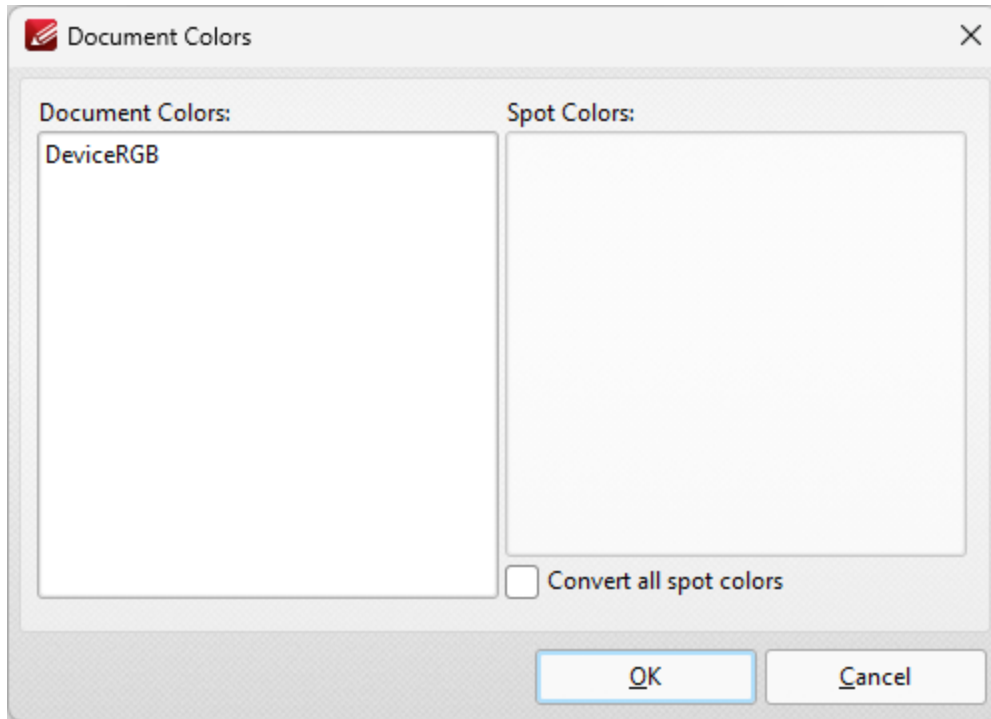
Figure 4. Document Colors Dialog Box

All colors contained in the document are detailed in this dialog box. Select the boxes of spot colors to include them in the conversion, or select the **Convert all spot colors** box to convert all spot colors.

5.4.19   Digital Signatures

Digital Signatures

Hover over **Digital Signatures** to view the digital signatures submenu:
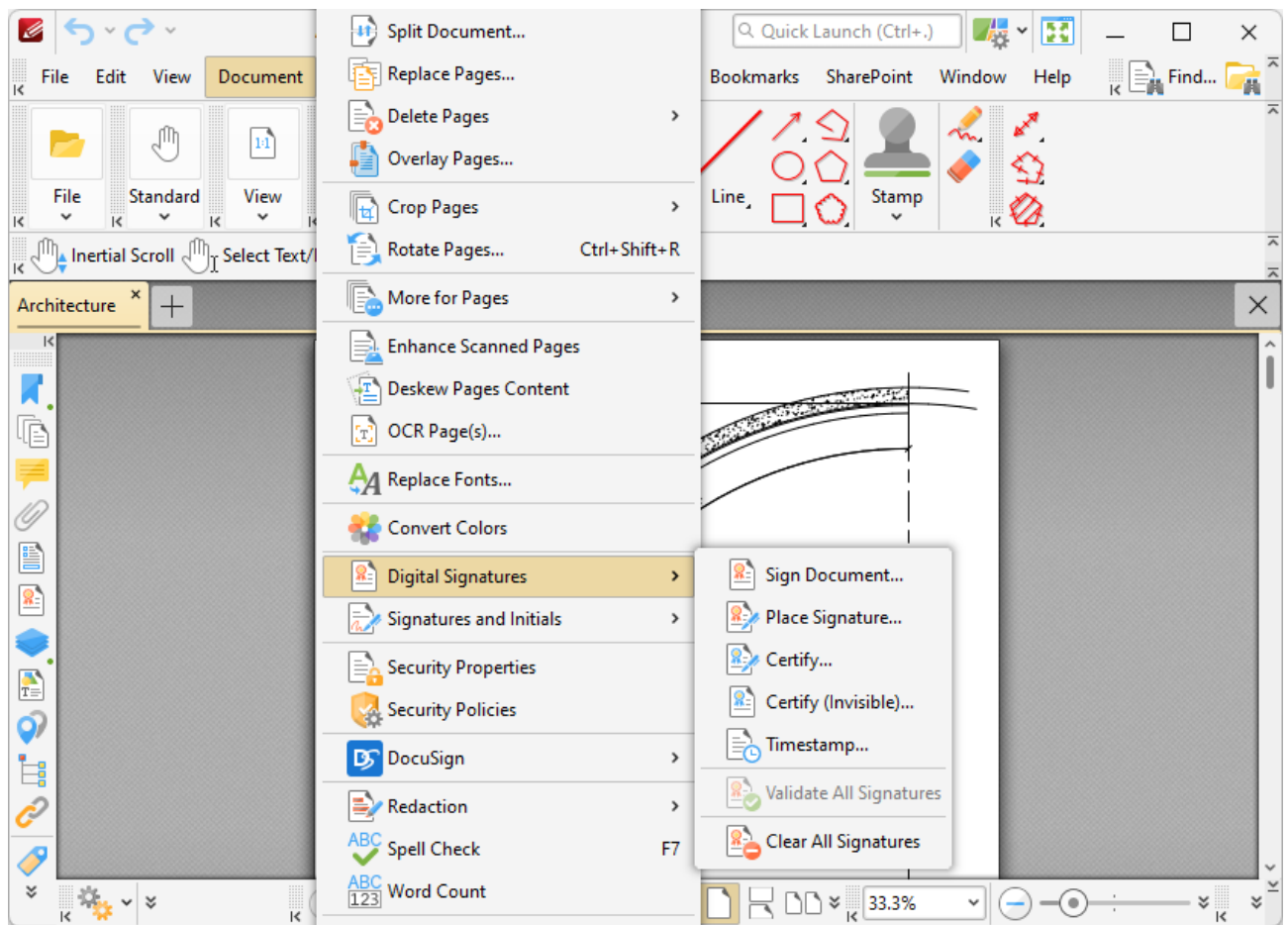
Figure 1. Document Tab Submenu, Digital Signature Options

Digital signatures are used to demonstrate the authenticity of documents and increase their security. They can also be used to determine editing permissions for documents, and to add timestamp server verification to them. The **Form Toolbar** [319] can be used to add digital signature fields to documents. Digital signatures utilize a digital ID in order to operate. Digital IDs are used to create digital signatures and to decrypt documents that have been encrypted for the owner. They contain the

information detailed in *(figure 3)* below, as well as two keys: the *public* key and the *private* key. The public key contains the information about its owner, and can be shared by the owner in order for a recipient to encrypt information that is intended for only the owner to view. The public key can also be used to validate the digital signature of the owner. The private key is used to create/apply digital signatures, and to decrypt documents that have been encrypted via certificate security.

Sign Document

Click **Sign Document** to sign existing signature fields. The dialog box detailed in *(figure 2)* will open. If more than one signature field is present then it is necessary to select the desired field. If there are no existing signature fields then the pointer will transform into a blue rectangle. This represents a new signature field. Place it at the desired location in the document and then click to create the signature field. The **Sign Document** dialog box will open:
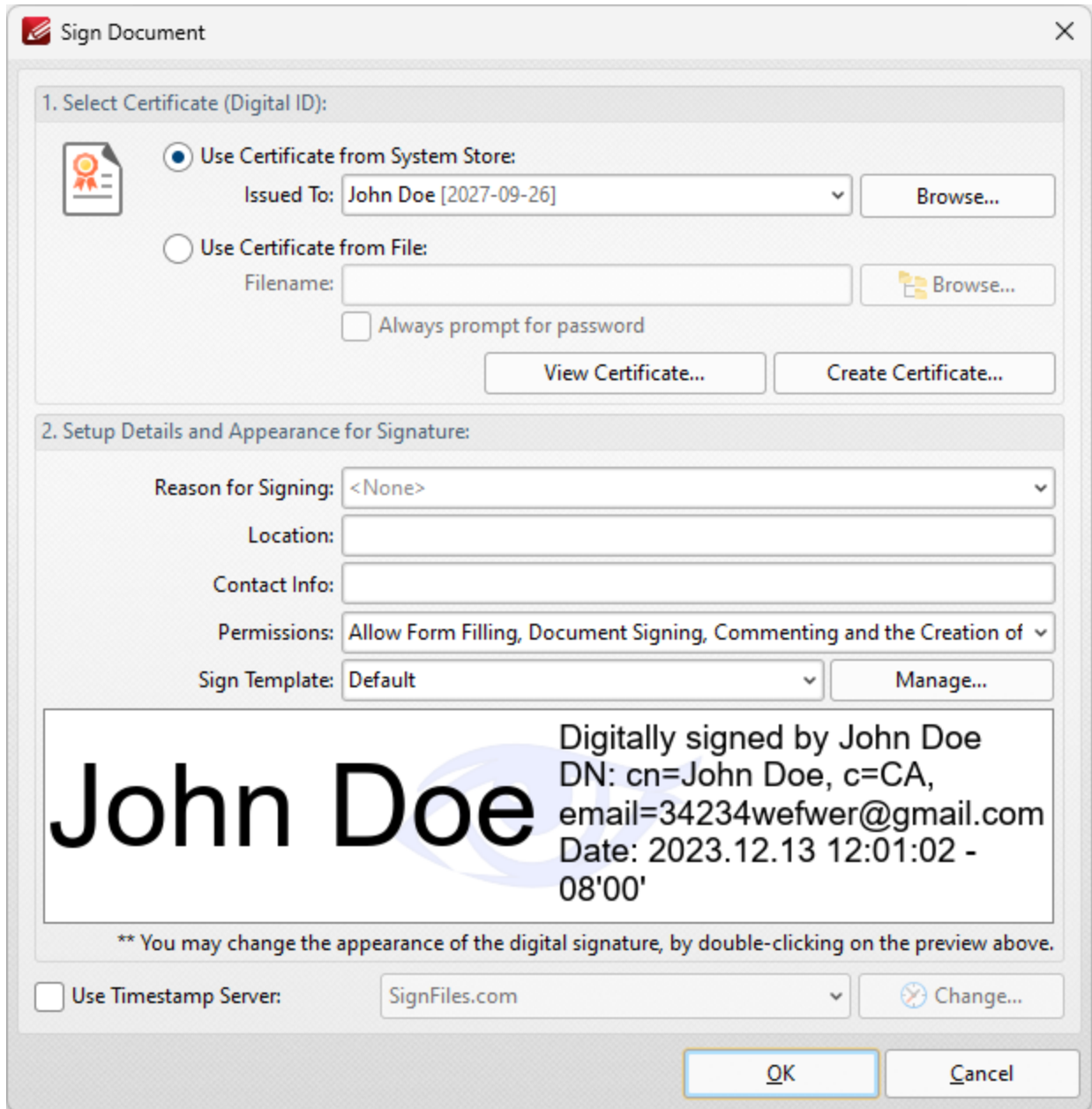
Figure 2. Sign Document Dialog Box

- Select a certificate from the system store or the local computer.
- Click **View Certificate** to view details about the selected certificate.
- Click **Create Certificate** to create a new certificate. The dialog box displayed in *(figure 3)* will open.
- 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 as desired.
- Click the **Contact Info** box to add contact information to the signature.
- Click the **Permissions** box to determine the changes that are permitted after the document has been signed.

- Click the **Sign Template** menu to select layout options for the signature and associated information.
- Click **Manage** to manage/customize/create signature templates. The **Digital Signature Appearance Templates** dialog box will open, as detailed below.
- Select the **Use Timestamp Server** box to select a timestamp server to add to the signature, then select a timestamp server from the dropdown menu. Click **Change** to view/edit the details of the timestamp server used.

Click **OK** to add the digital signature to the document.

Figure 3. Digital Signature Appearance Templates Dialog Box

- Select signature templates, then select **Clone/Reset/Edit** as desired:
  - Click **Clone** to clone the selected signature template. This is a useful feature if parameters of existing signature templates need to be changed and saved without editing the original template.
  - Click **Reset** to revert the values of the the selected signature template to its default state.
  - Click **Edit** to adjust the values of the selected signature template:

Figure 4. Edit Template of Digital Sign Dialog Box

- Use the **Template Name** text box to edit the name of the signature template.
- Use the **Icon** dropdown menu to specify the icon used with the signature, and use the adjacent **Font** dropdown menu to specify the font used.
- Use the **Background Logo** dropdown menu to specify the logo used with the signature, and use the adjacent **Opacity** number box to specify the transparency level of the background.
- Use the **Display Text** check box options to specify the text that is displayed with the signature.

Click **OK** to save changes.

Creating Digital Certificates

The following dialog box is used to create digital certificates:
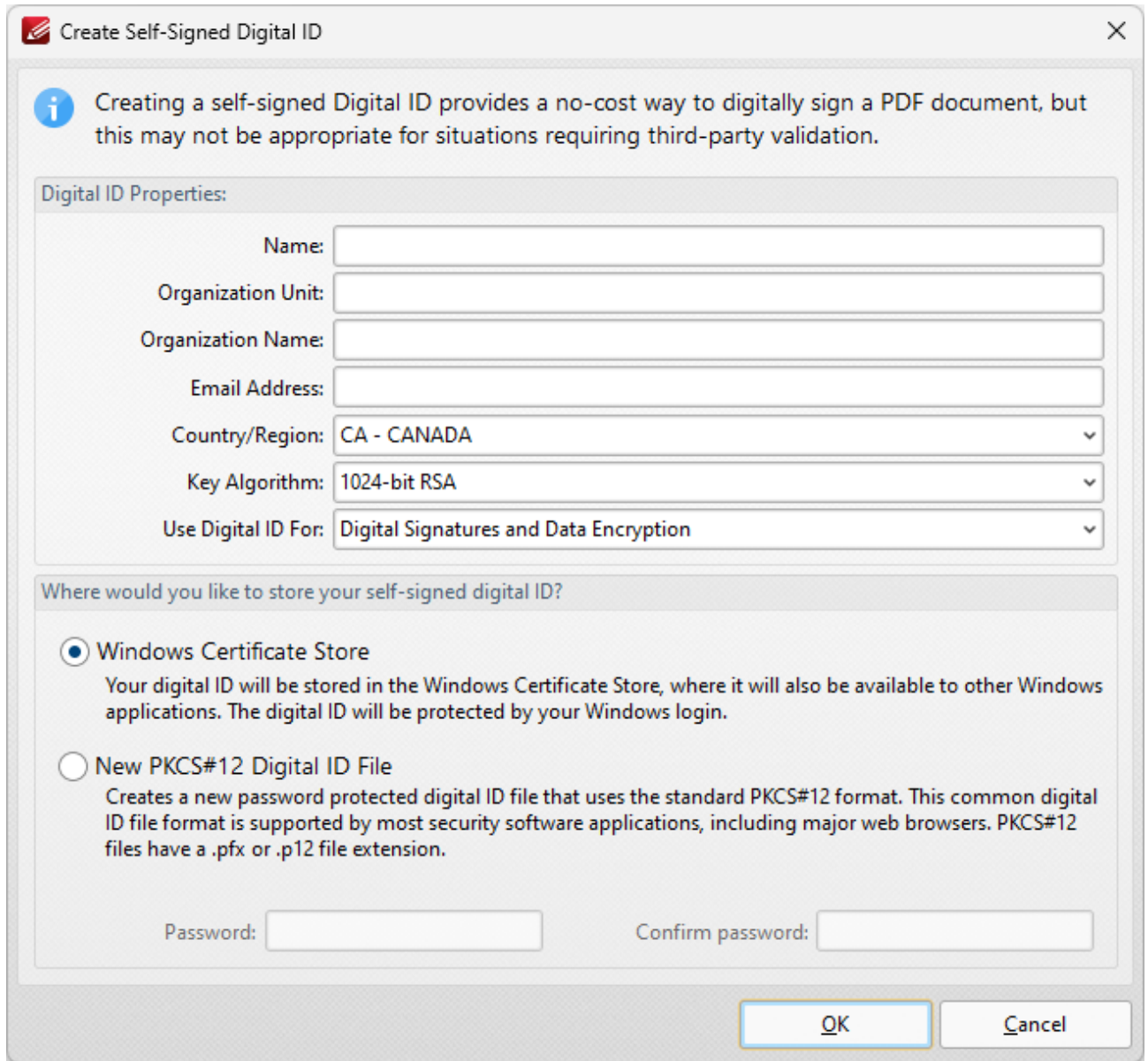
Figure 3. Create Self-Signed Digital ID Dialog Box

- Enter the desired user information in **Name, Organization** and **Email** text boxes.
- Use the **Country/Region** dropdown menu to enter the nationality of the owner of the digital certificate.
- Select either **1024-bit RSA** or **2048-bit RSA** as the key algorithm. **1024-bit RSA** is more universally compatible than **2048-bit RSA,** but **2048-bit RSA** offers more security.
- Select a storage location for the digital certificate. If the **PKCS#12** option is used then enter and confirm a password in the **Password** text boxes.

Click **OK** to create the digital certificate. It will then be available in the **Use Certificate from System Store** dropdown menu detailed in *(figure 2).*

Place Signature

Click **Place Signature** to create and sign a digital signature field in one step. A blue rectangle will appear beneath the pointer. This rectangle represents the new signature field. Move it to the desired location and then click to add it to the document. The **Sign Document** dialog box will open. Follow the instructions as detailed beneath **(figure 2).**

Certify (Visible) and (Invisible)

Click **Certify (Visible)** to certify documents and add a visible signature. This process is identical to the **Sign Document** process detailed above. However, it is only possible to certify documents a single time, whereas is it possible to digitally sign documents multiple times.

Click **Certify (Invisible)** to certify documents and add an invisible signature. This process is identical to the **Certify (Visible)** process detailed above, but the physical signature is excluded from the process.

Timestamp

Click **Timestamp** to add timestamps to documents. The following dialog box will open:
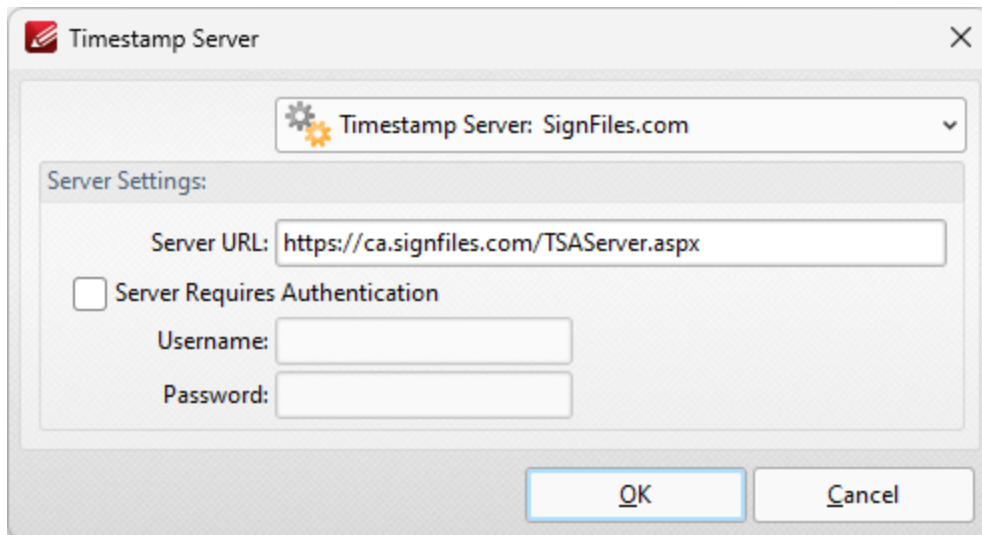
Figure 4. Timestamp Server Dialog Box

Timestamps are used to ensure the long-term preservation of digital signatures, time-seal date objects (to prove when they were received), protect copyrights/intellectual property and provide notarization services.

- Use the **Timestamp Server** dropdown menu to select a timestamp server.
- If a timestamp server is being used for the first time then 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 associated text boxes.

Click **OK** to timestamp documents.

Validate All Signatures

Click **Validate All Signatures** to validate all document signatures. (Please note that the default settings of the computer on which the files are viewed may result in this happening automatically when documents are opened).

Clear all Signatures

Click **Clear All Signatures** to clear all digital signatures/certificates from signature fields. Please note that this process does not remove the signature field itself. The **Edit Form** 319 feature is used for this purpose.

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, as detailed **here.** 231

5.4.20 Signatures and Initials

Signatures and Initials

Hover over **Signatures and Initials** to view customized (non-digital) signatures/initials and manage, apply or cancel current signatures/initials:
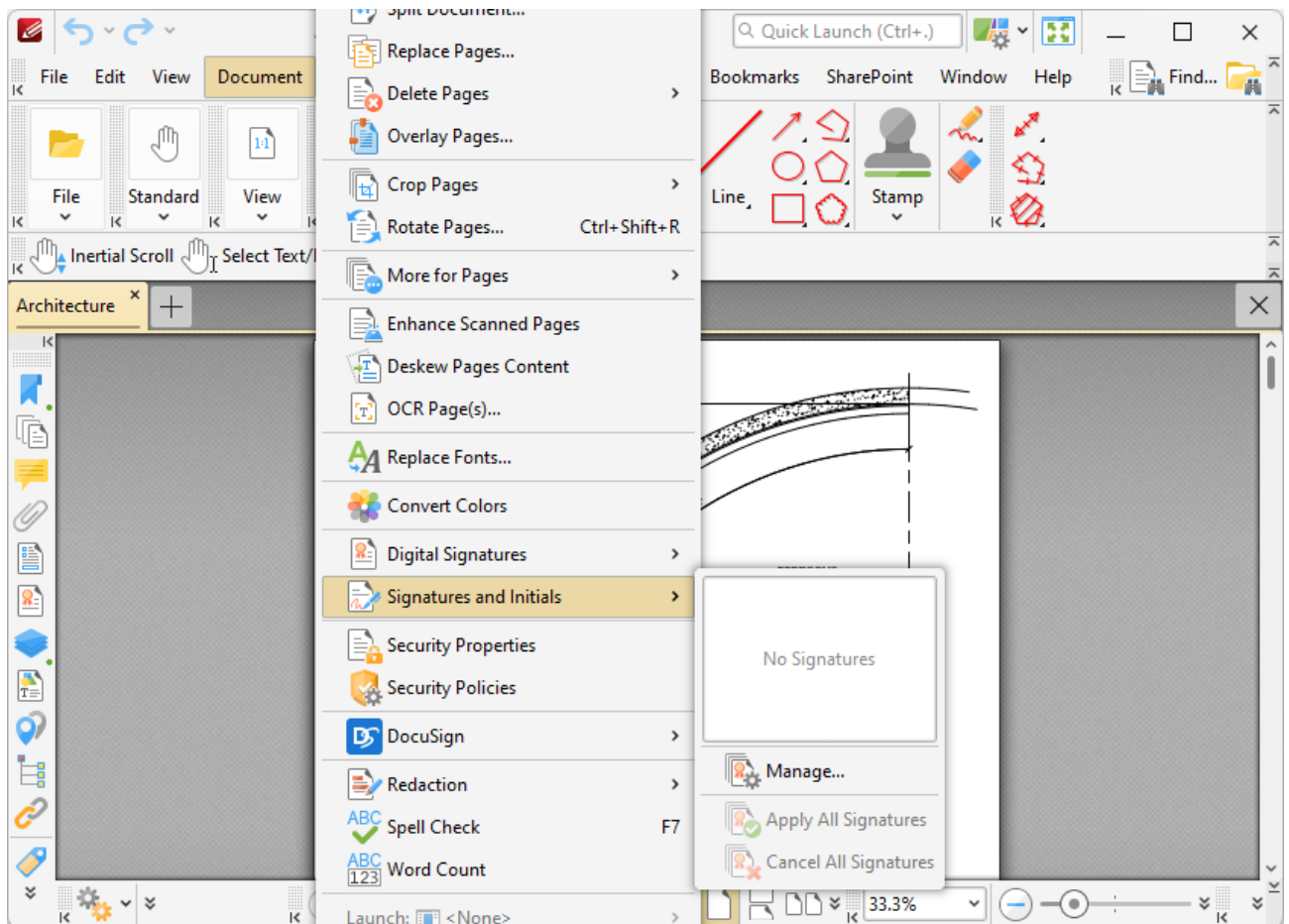
Figure 1. Document Tab Submenu, Signatures and Initials

- Available signatures are displayed at the top of the submenu. Click to select signatures and then add them at the desired location. They can then be resized and/or repositioned as detailed **here.** 1138
- Click **Manage** to manage signatures. The dialog box detailed in **(figure 2)** will open.

- Click **Apply All Signatures** to apply all placed signatures to the document. This process converts signatures from editable objects into base content of documents.
- Click **Cancel All Signatures** to remove signatures that have been placed in documents. (This action will not remove signatures that have been applied. The **Undo** [203] action can be used to remove applied signatures).
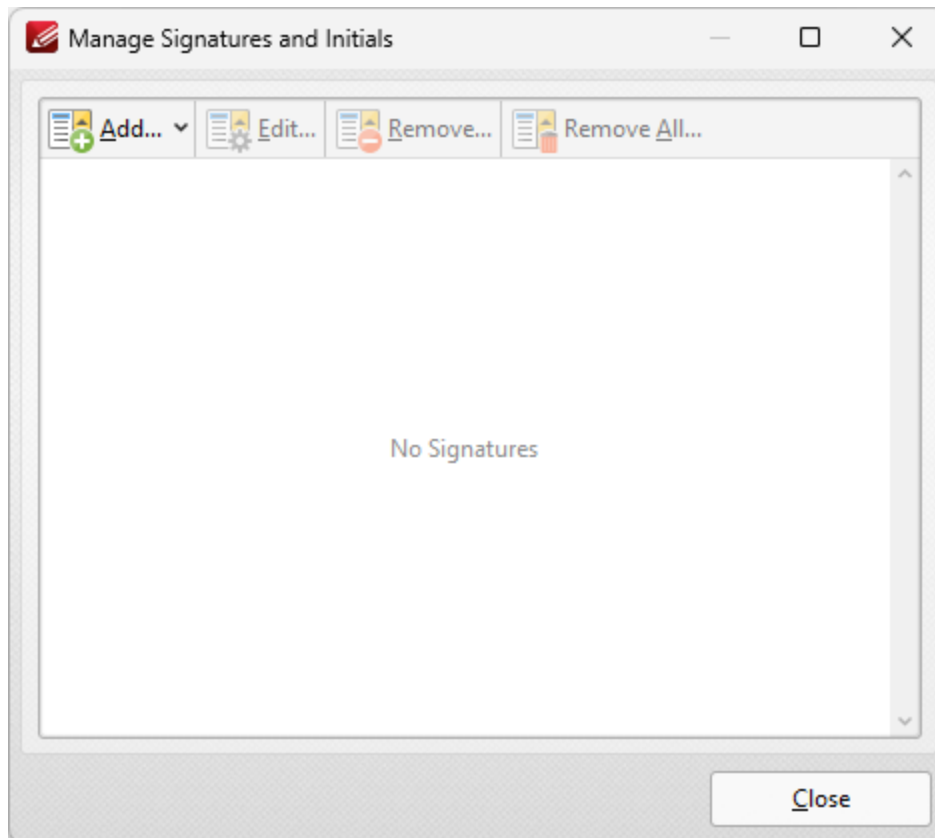
Figure 2. Manage Signatures and Initials Dialog Box

- Click **Add** to add new signatures/initials to the list of available options:
    - Click **From File** to add a new signature from a file.
    - Click **From Clipboard** to use the current clipboard content to create a new signature.
    - Click **Draw Signature** to draw a new signature.
    - Click **Type Signature** to type a new signature.
    - Click **From Webcam** to create a new signature using your webcam.
- Click **Edit** to edit selected signatures. The **Edit Signatures/Initials Information** dialog box will open. Update the signature name/password as desired then click **OK.**
- Click **Remove** to remove selected signatures, or **Remove All** to remove all signatures.
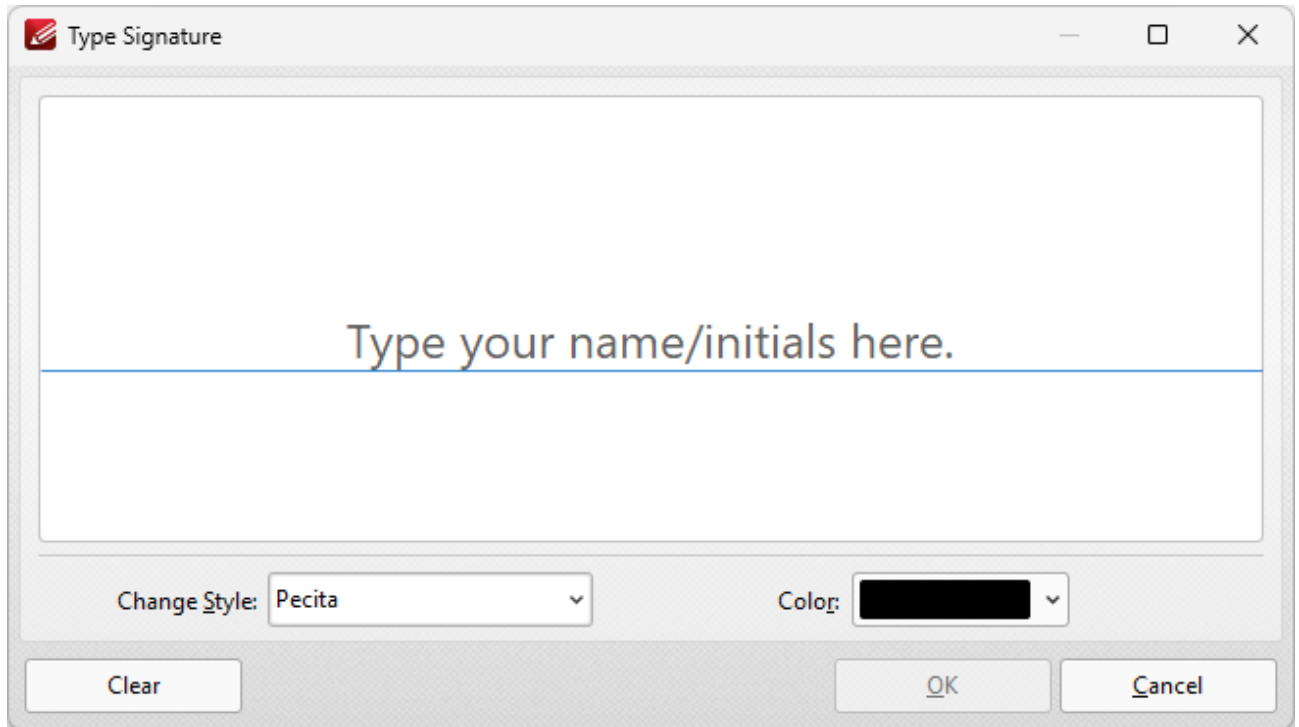
Figure 3. Type Signature Dialog Box

- Enter the name to be used for the signature in the window.
- Use the **Color** dropdown menu to determine the color of the signature.
- Click **Clear** to clear existing text from the signature pane.
- Use the **Change Style** dropdown menu to change the font used for the signature. **Pecita** is the only font available by default, but you can use any **TrueType/OpenType** font for this purpose. If you want to make additional fonts available, then copy the corresponding **.ttf/.otf** file from **"C:\Windows\Fonts"** into the folder **"C:\Program Files\Common Files\Tracker Software\Common\SignatureFonts".**

Click **OK** to create the new signature.

5.4.21   DocuSign

DocuSign

Hover over **DocuSign** to view the **DocuSign** options in **PDF-XChange Editor:**
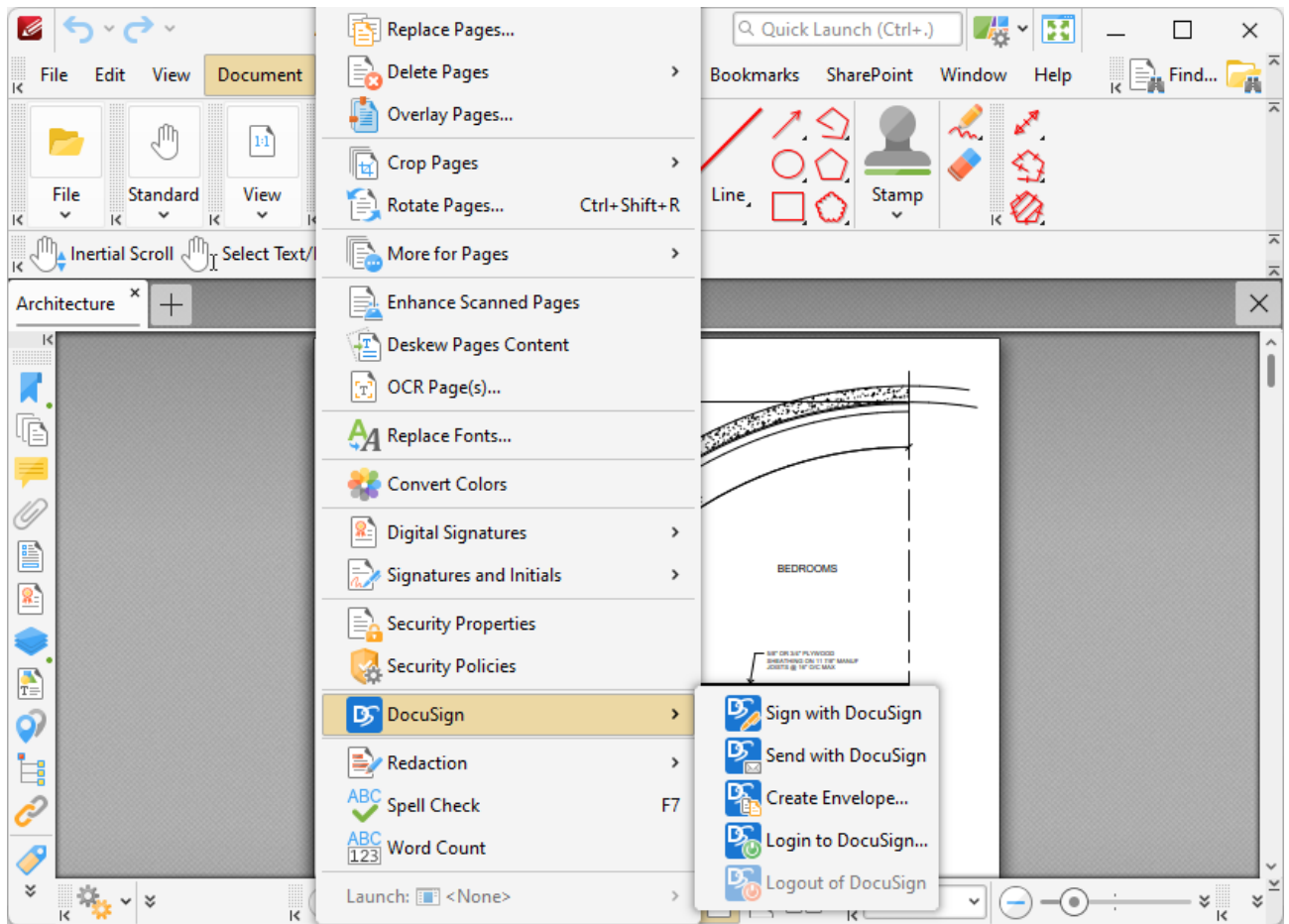
Figure 1. Document Tab, DocuSign Options

- Click **Sign with DocuSign** to sign the current document with **DocuSign.**
- Click **Send with DocuSign** to send the current document with **DocuSign.**
- Click **Create Envelope** to create a **DocuSign** envelope, as detailed below.
- Click **Login to DocuSign** to log in to **DocuSign.**
- Click **Logout of DocuSign** to log out from **DocuSign.**

Create DocuSign Envelope

When you click **Create Envelope** in the **DocuSign** submenu, the **Choose Files** dialog box will open:
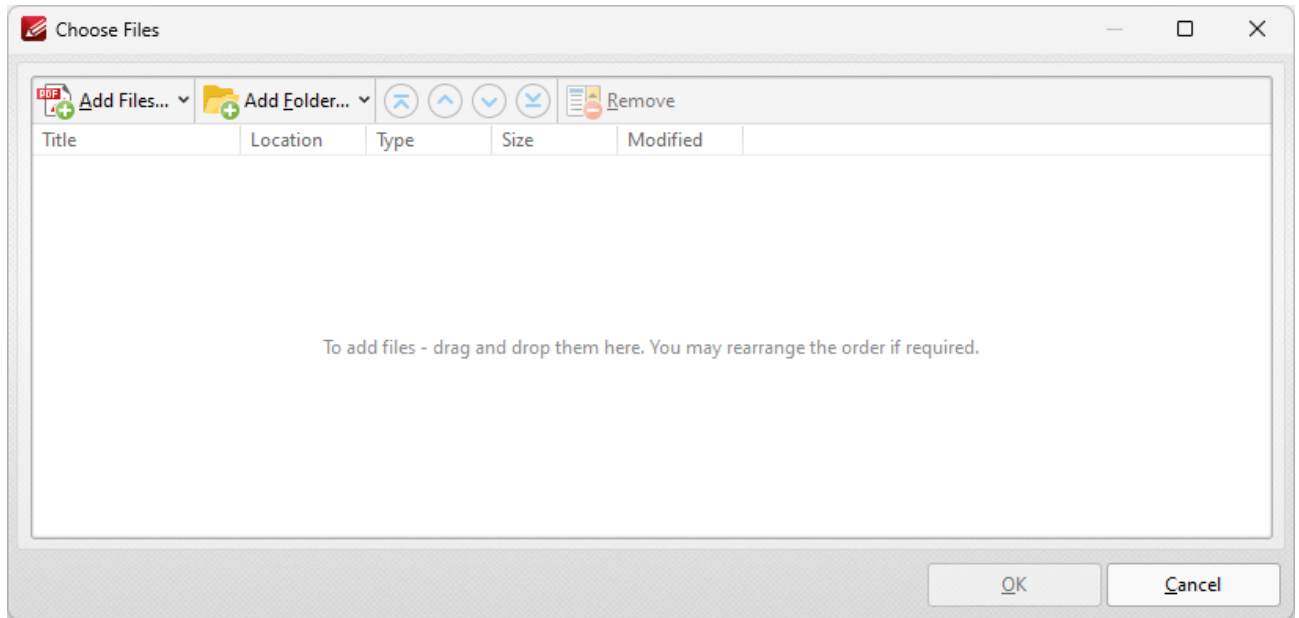
Figure 2. Choose Files Dialog Box

- Click **Add Files** to select files from the local computer to add to the list of source files. Click the dropdown arrow for additional options:
    - Click **Add All Opened Documents in Opened Order** to add all open documents in the order in which they were opened.
    - Click **Add All Opened Documents in the Current Tab Order** to add all open documents in their current order in the document tab.
- 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 3)*.
- If you want to use a custom page range from a document in the list, then double-click it and specify the desired page range in the **Page Range Setup** dialog box. Page range settings are deatiled **here.** ¹²⁷⁴
- Use the arrow icons (or click and drag) to reorder selected documents in the list. This determines the order in which they appear in the new document.
- 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.

Click **OK** to create a **DocuSign** envelope from all files in the **Combine Files** dialog box.

Figure 3. 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 **Include Subfolders** box to include subfolders of the parent folder when the software searches for files to add to the list of source files.
- Select the **Select 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 **Add Custom Filter** to open the **Add Custom Filter** dialog box:

Figure 4. 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.

5.4.22 **Redaction**

Redaction

Hover over **Redaction** to view redaction options:
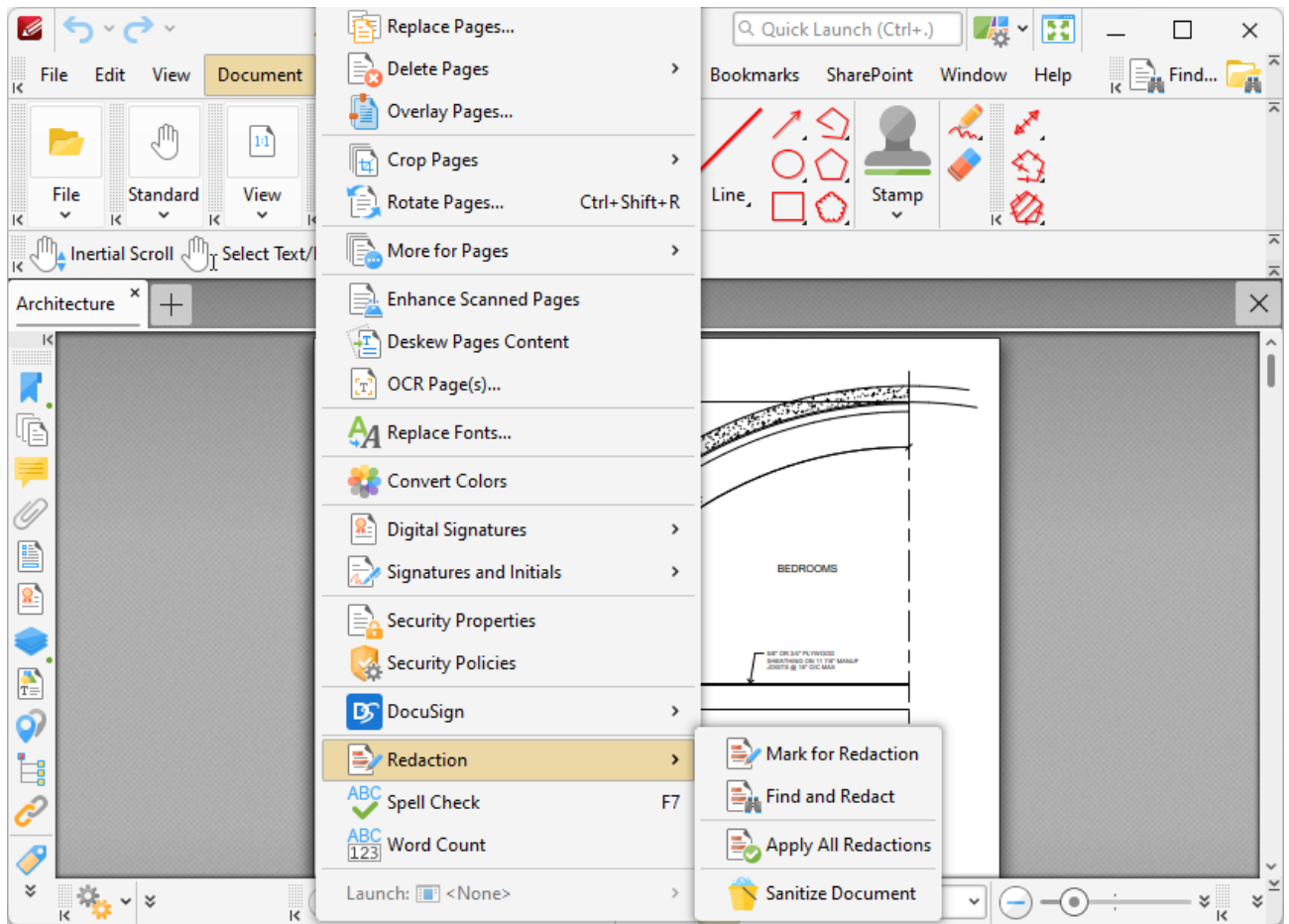
Figure 1. Document Tab Submenu, Redaction

Redaction "blacks out" designated document content. Click **Mark for Redaction** to determine sections of the document for redaction. The pointer will turn into a crosshairs icon. Click and drag to determine areas for redaction:
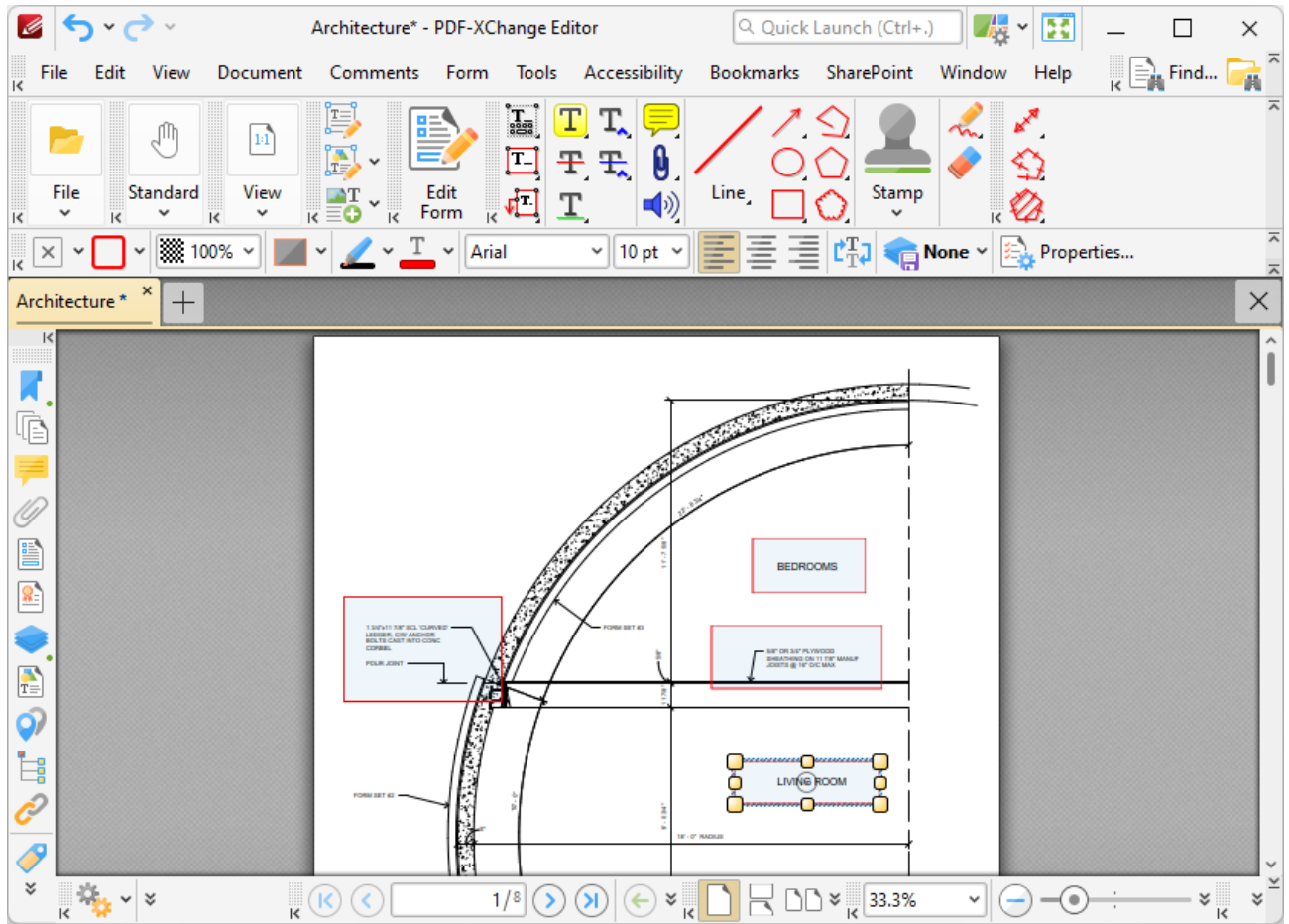
Figure 2. Areas Marked for Redaction

The lower area has just been determined, which means editing options are available:

- Use the control points to resize areas.
- Use the editing aids detailed **here** |610| to assist in the precise placement of areas marked for redaction.
- Click and drag areas to reposition them.
- Right-click areas for further options:
    - Click **Apply All Redactions** to redact all areas marked for redaction.
    - Click **Apply Selected Redaction(s)** to redact only selected areas. (The **Select Comments Tool** |846| can be used to select multiple areas).
    - See **here** |1120| for an explanation of the remaining options.

Click **Apply All Redactions** to perform the redaction. Marked areas will be replaced with black fill:
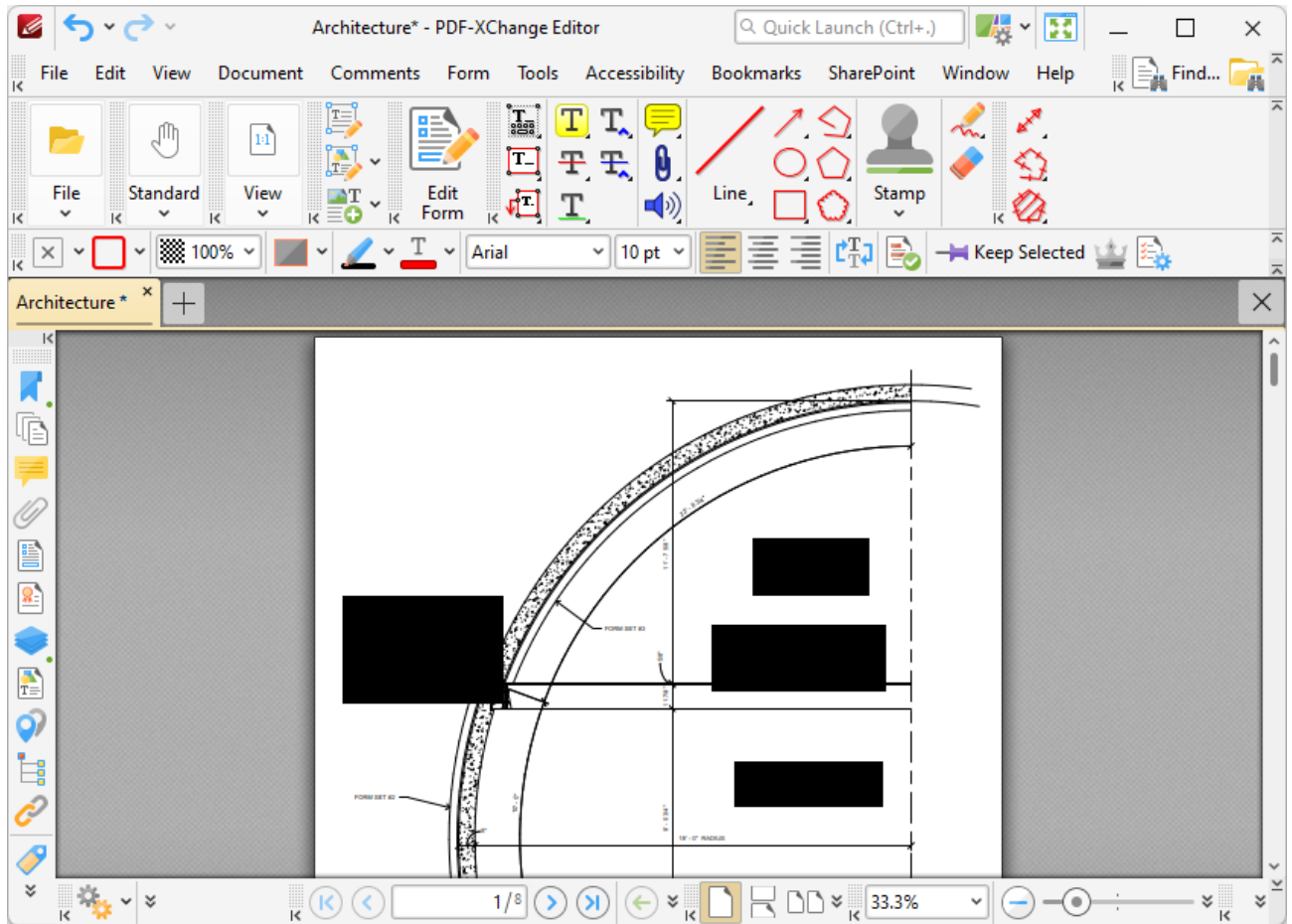
Figure 3. Redacted Areas

When the **Redaction** tool is selected, the following options are enabled in the **Properties Toolbar:** [485]

- **Fill Color** determines the color of areas marked for redaction.
- **Stroke Color** determines border color of areas marked for redaction.
- **Opacity** determines the level of transparency in areas marked for redaction.
- Use the **Overlay Type** dropdown menu to determine the type of overlay used for the reaction:
    - Click **Standard** to use stand redaction overlays, which are a fill of a specified color.
    - Click **Blur** to use a blur for redaction overlays, or **Blur Extra** to use a stronger blur than the default option.
    - Click **Pixelate** to use pixelation for redaction overlays, or **Pixelate Extra** to use a stronger pixelation than the default option.
- **Redaction Fill Color** determines the color of redacted areas.
- **Text Color** determines the color of text used to overlay redacted areas when the text option is enabled for redactions. The text content must be specified in the relevant area of the **Properties** [213] pane before areas are marked for redaction in order to enable this option.
- **Font** determines the font used when the text option is enabled for redactions.
- **Font Size** determines the font size when the text option is enabled for redactions.

- The **Align** options determine the alignment of text when the text option is enabled for redactions.
- **Repeat Overlay Text** repeats the text used within redacted areas when the text option is enabled for redactions.
- **Apply All** performs the redaction on all areas marked for redaction.
- **Keep Selected** determines whether or not the **Redaction** feature remains selected after a single area has been marked for redaction. If this option is enabled then the tool will remain selected and can be used to create areas consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after a single area is marked
- **Exclusive Mode** simplifies the process of using the **Redaction** feature. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to mark areas for redaction without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit the **Redaction Properties** pane. See **here** 1292 for further information. Note that the options in the **Overlay** section apply to completed redactions.

Find and Redact

Click **Find and Redact** to launch the **Find and Redact** feature:
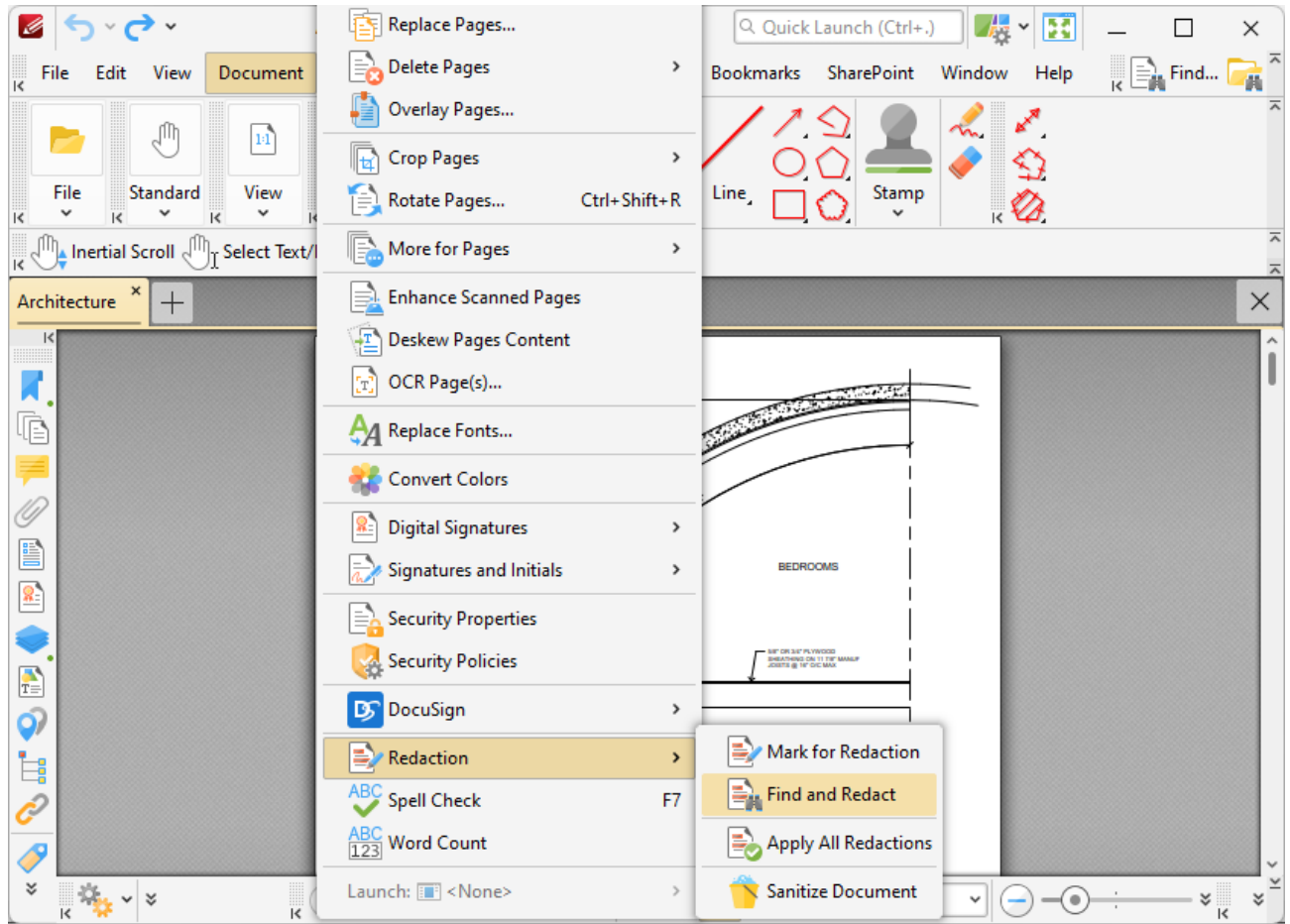
Figure 4. Document Tab Submenu, Redaction Options, Find and Redact

This feature is used to search for specific words or patterns (phone numbers, credit card numbers, social security numbers, emails or dates) in documents and then either mark them for redaction or redact them immediately. When it is selected, the **Find and Redact Text** dialog box will open:
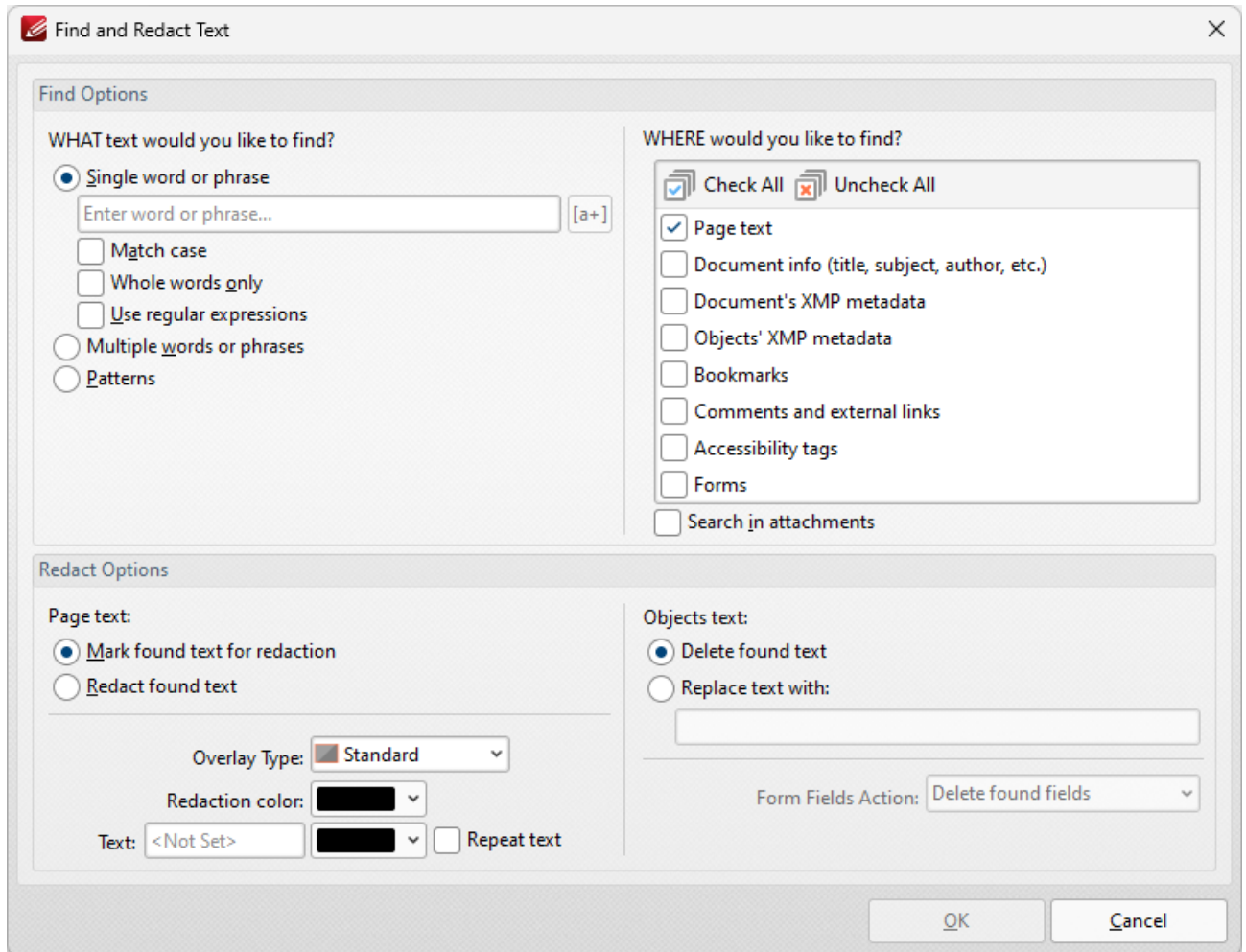
Figure 5. Find and Redact Text Dialog Box

- Select **Single word or phrase** to search for a single word/phrase, then enter the desired word/phrase in the text box.
  - Select the **Match Case** box to match the case of word entered in the text box.
  - Select the **Whole Words Only** box to match only whole words in the document to the word entered in the text box.
  - Select the **Use regular expressions** box to enable the use of **ECMAScript** syntax-based regular expressions in the search. Further information about regular expressions is available **here.**
- Select **Multiple words or phrases** to search for multiple words/phrases. Click **Add/Remove** to add/remove words/phrases, then enter the desired words/phrases in the text box. Click **Save** to save the current word list to a plain text file for subsequent use. Click **Load** to load a plain text file of words into the text box.
- Select **Patterns** to search for specific patterns, then select either **Phone numbers, Credit cards, Social security numbers, Emails** or **Dates** to determine the patterns that you want to find.
  - Select an option in the **Locale** dropdown menu to determine the language used in the search.

- Click **Add** to add a custom pattern to the available search options. Enter the name, value and description of the custom pattern and click **OK** to save. The custom pattern will then be available in the list of patterns.
- Click **Remove** to remove selected custom patterns.
- Select a **Page text** radio button to determine the outcome of the operation for page text:
  - Select **Mark found text for redaction** to mark search results for redaction.
  - Select **Redact found text** to immediately redact search results.
- Select the check boxes on the right side of the dialog box to determine where you want to search for text to redact.
- Select an **Objects text** radio button to determine the outcome of the operation for object-based text (such as text in comments):
  - Select **Delete found text** to delete text that matches the search terms.
  - Select **Replace text with:** to replace text that matches the search terms, then enter the desired replacement text in the text box.

Click **OK** to find and mark/redact content.

Sanitize Document

Click **Sanitize Document** to remove sensitive information from documents:
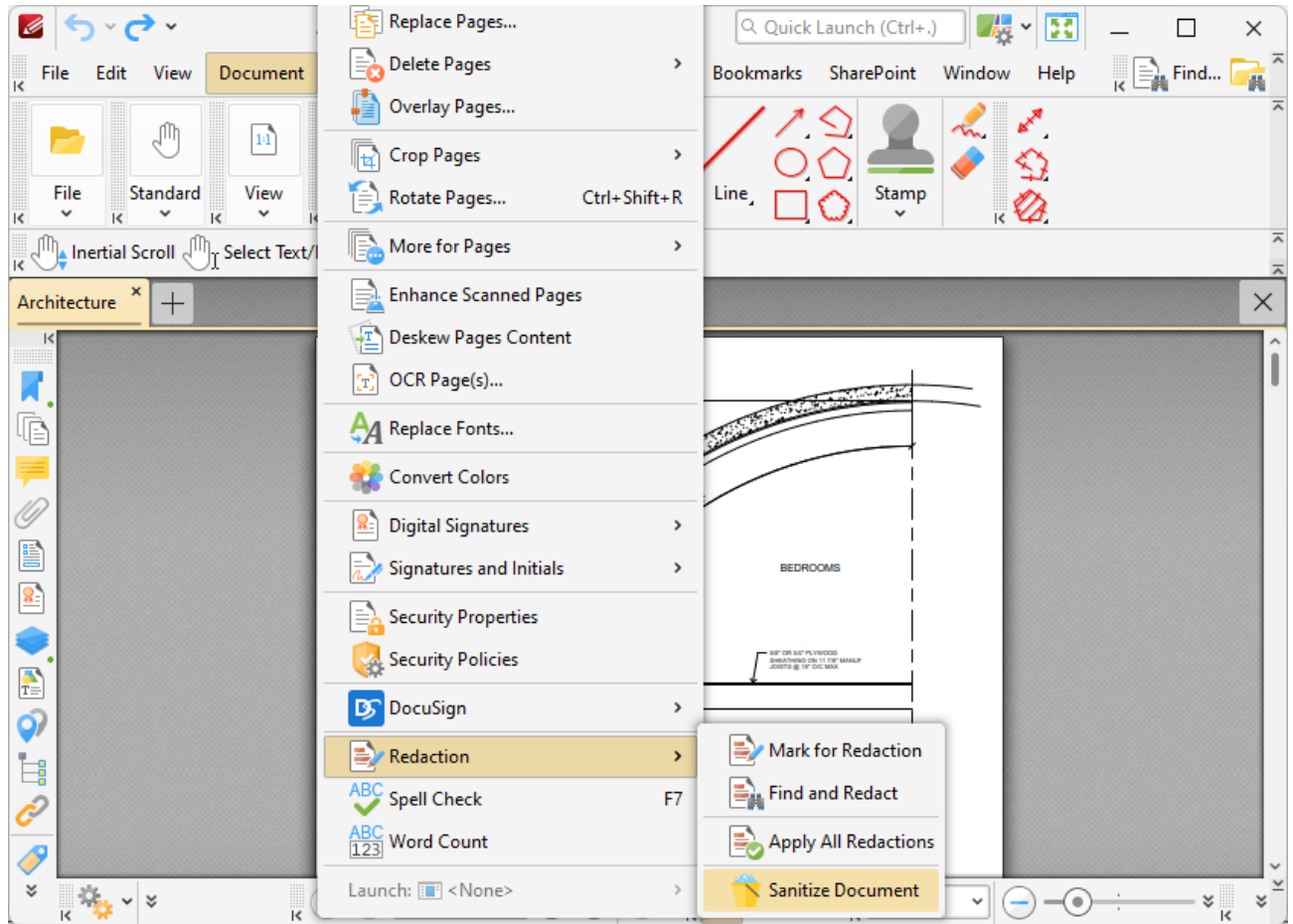
Figure 6. Document Tab Submenu, Redaction Options, Sanitize Document

The **Sanitize Document Options** dialog box will open:
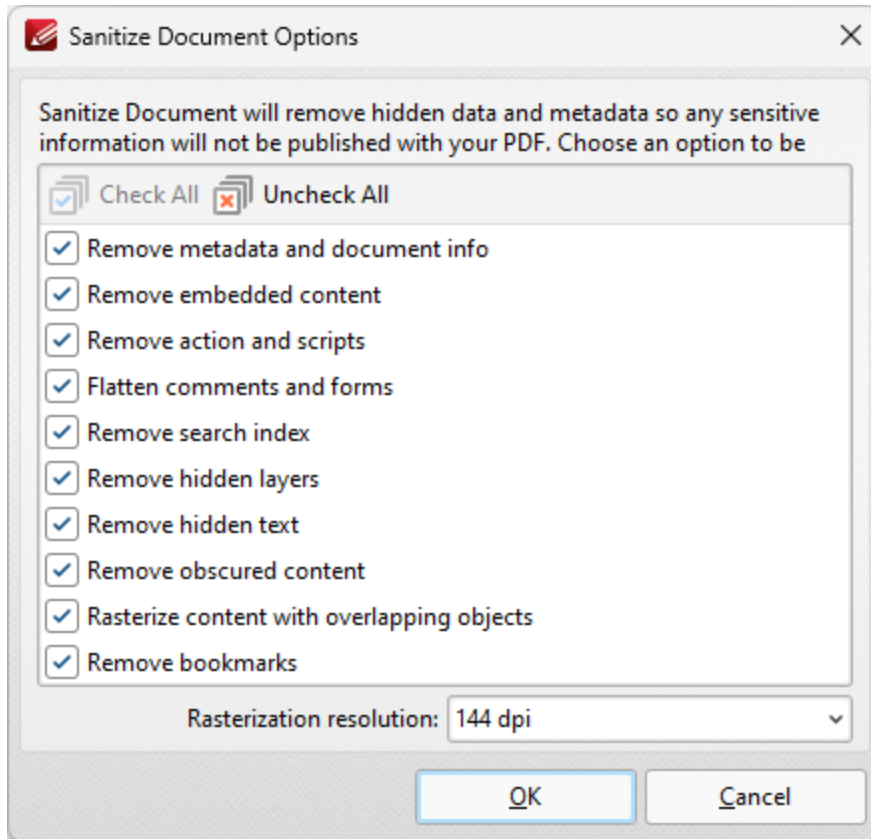
Figure 7. PDF-XChange Editor Dialog Box

Select the check boxes of the document content that you want to sanitize in the document, then use the **Rasterization resolution** dropdown menu to specify the desired resolution for sanitization, and click **OK** to sanitize the document.

5.4.23 **Spell Check**

Spell Check

Click **Spell Check** to launch the spell check feature:
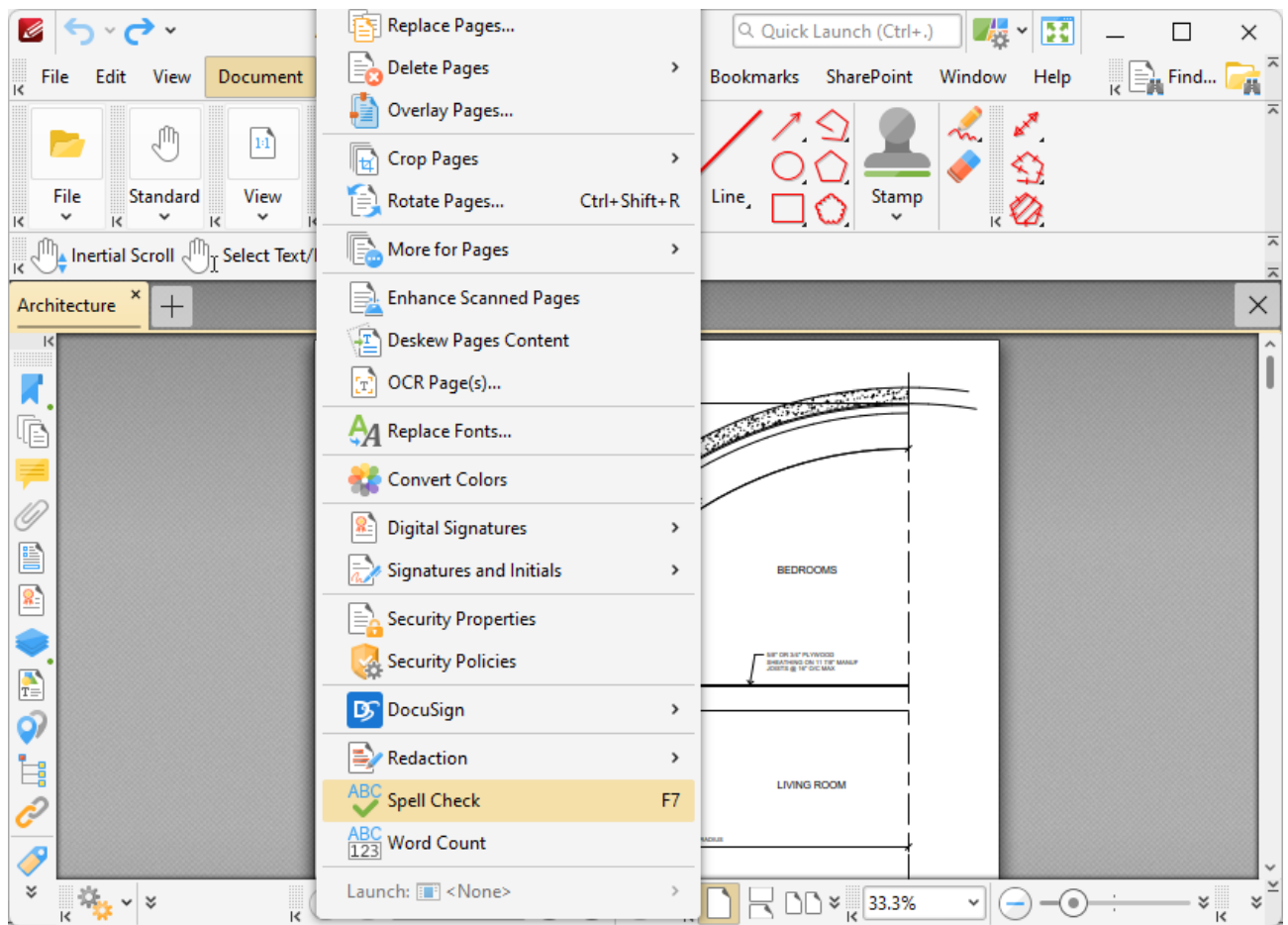
Figure 1. Document Tab Submenu, Spell Check

PDF-XChange Editor will then scan the document text. Words that are not contained in its dictionary will be underlined in the document and displayed one at a time in the spell check pane:
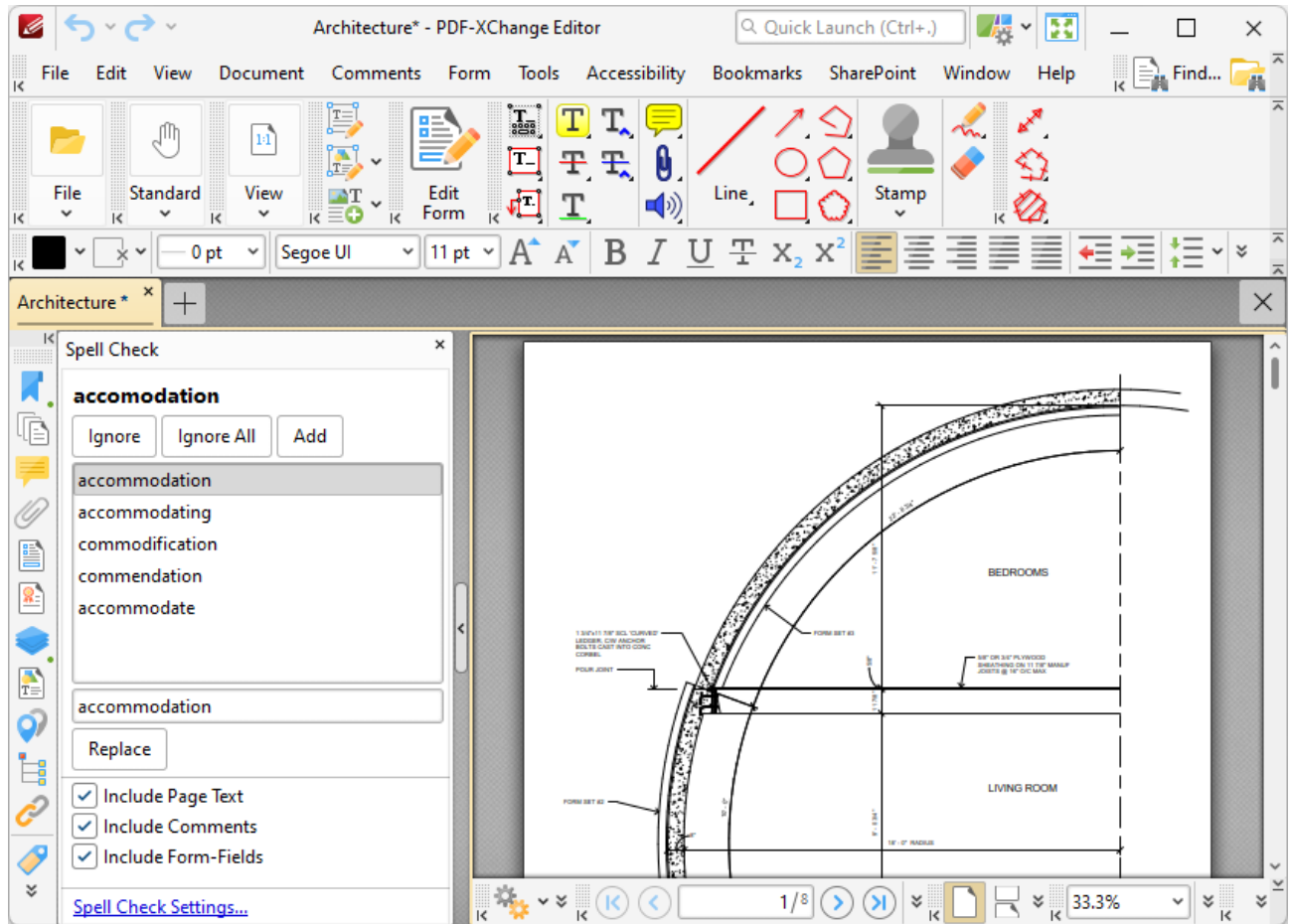
Figure 2. Spell Check Pane

The **Spell Check** feature is correcting the word "accomodation" 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 remaining instances of the selected word.
- Click **Add** to add the selected word to the custom word list. The **Spell Check** feature includes the words in the custom word list in its dictionary.
- Use the check boxes to determine which document elements are included in the spell-check process.
- Click **Spell Check Settings** to view/edit the settings for this feature. See **here** for a list of alternative dictionaries that can be used.
- Press F7 to enable the spell check feature. F7 is also used to move to the next misspelled word when moving through the results of spell checks. Press Alt+F7 to move to the previous misspelled word.

5.4.24 Word Count

Word Count

Click **Word Count** to perform a word count for the current document:
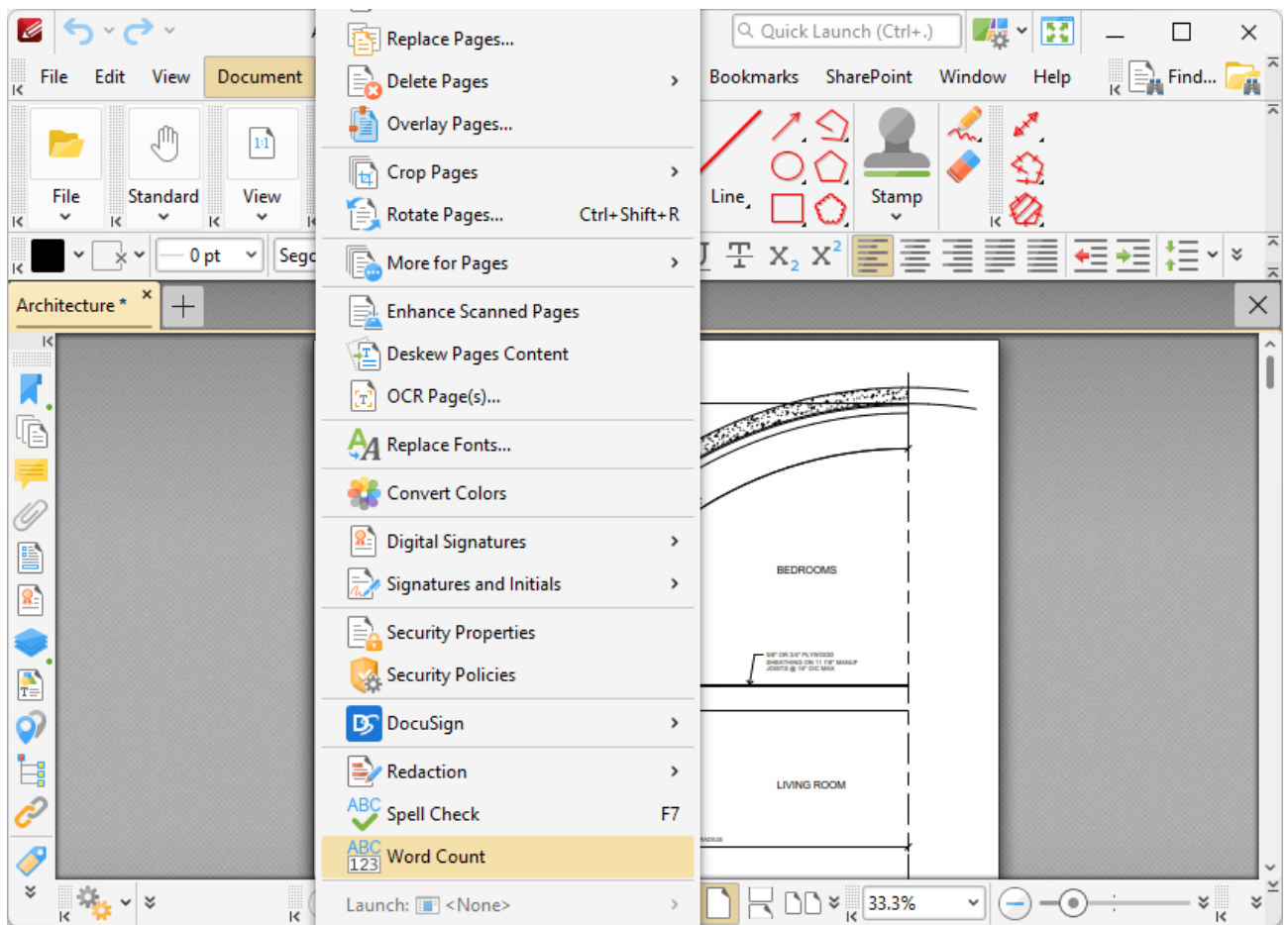
Figure 1. Document Tab Submenu, Word Count

The **Word Count** dialog box will open and display a breakdown of words in the document:
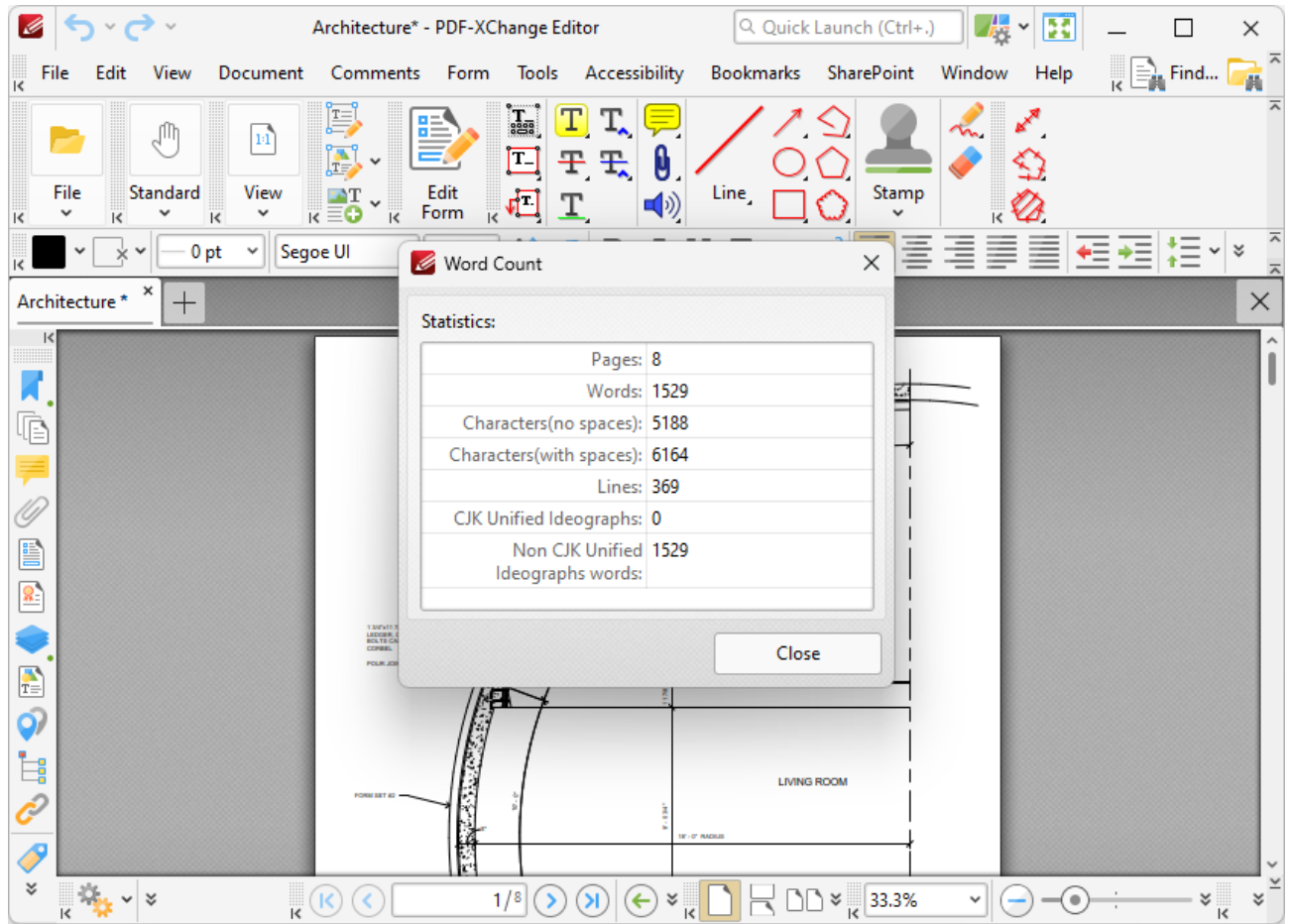
Figure 2. Word Count Dialog Box

5.4.25 **Launch**

Launch

Hover over **Launch** to view the list of applications in the **Launch Application Toolbar:** [479]
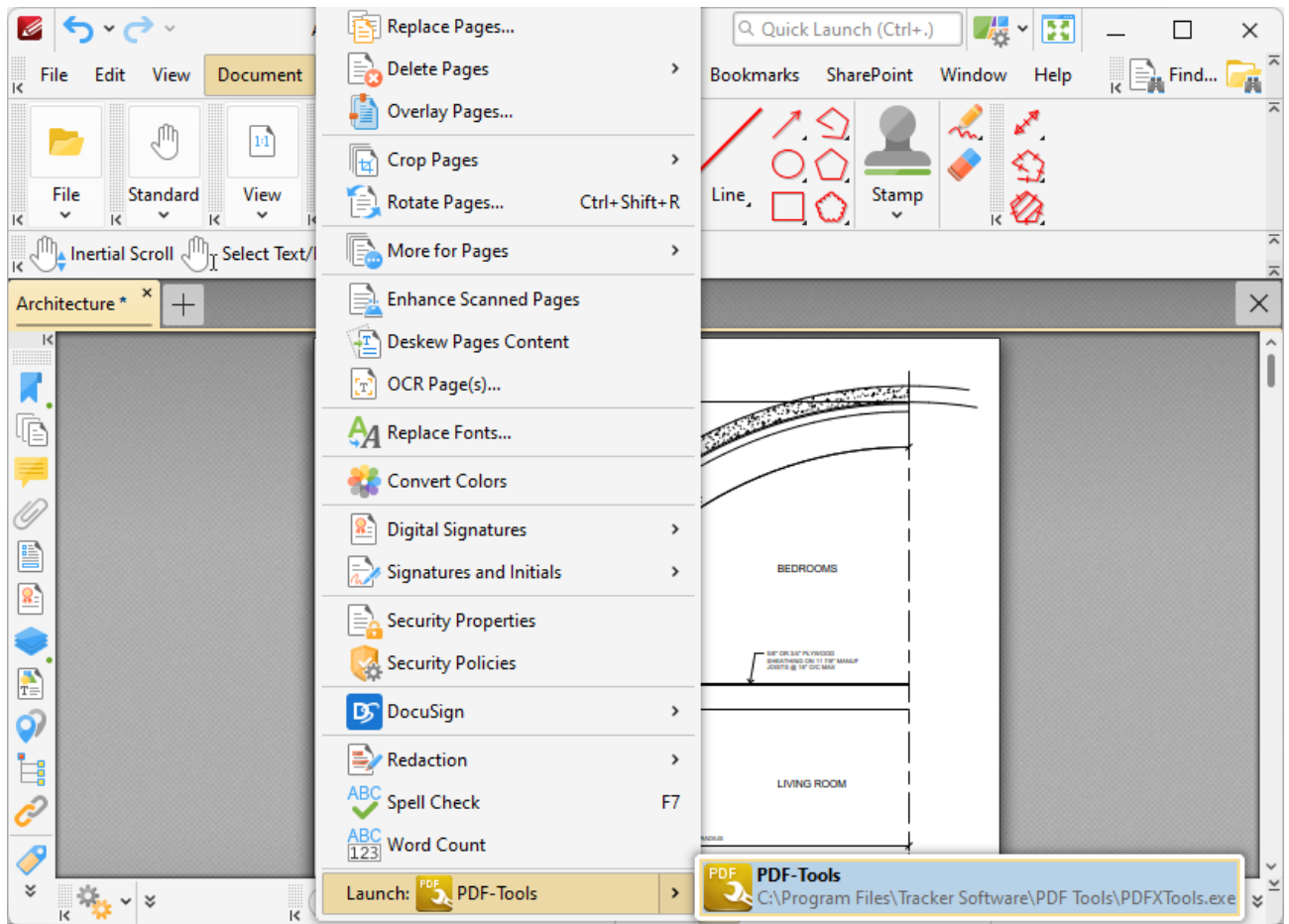
Figure 1. Document Tab Submenu, Launch Options

This toolbar provides a convenient way to launch active documents in an alternative application. Click applications in the list to launch them on the local computer. Use the **Launch Applications** [271] preferences tab in to view/manage launch applications.

5.5 Comments

 Comments

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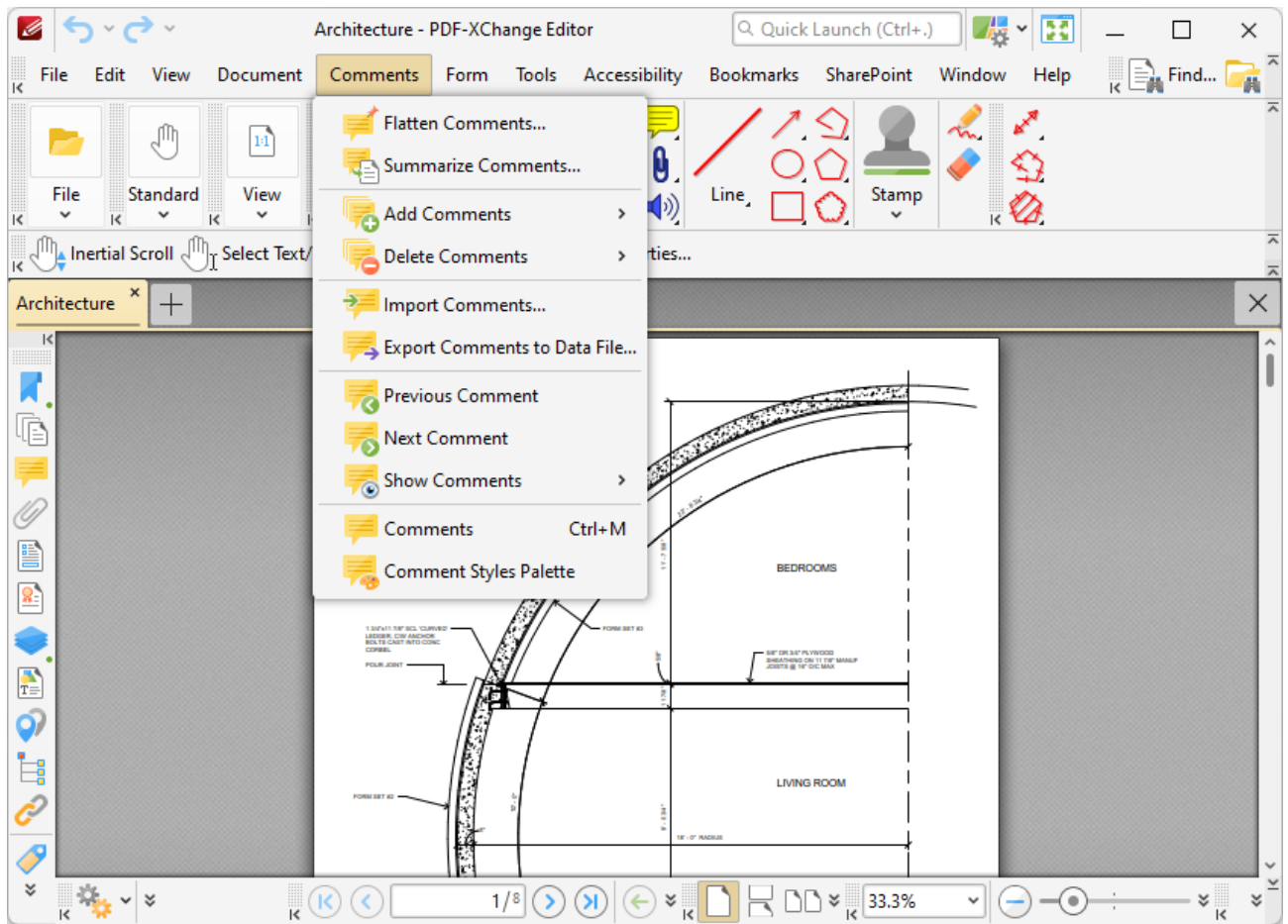
Figure 1. Comments Tab Submenu

Comments are a convenient and customizable way to markup and annotate documents. The comment creation tools are detailed **here.** [803] The commands in **Comments** tab relate to the group-editing/management of comments:

- Click **Flatten Comments** 775 to convert comments into base content.
- Click **Summarize Comments** 777 to create a summary of document comments.
- Hover over **Add Comments** to view options for adding comments to documents.
- Hover over **Delete Comments** to view options for deleting comments from documents.
- Click **Import Comments** 784 to import comments from a saved file.
- Click **Export Comments to Data File** 786 to export comments for subsequent use.
- Click **Previous Comment** to move to the previous comment.
- Click **Next Comment** to move to the next comment.
- Click **Show Comments** 788 to determine visibility settings for comments.
- Click **Comments** 790 to launch the **Comments Pane** and view a breakdown of comments in documents.
- Click **Comment Styles Palette** 791 to launch the **Comment Styles Palette,** which is used to create/select customized comment styles.

Additionally, please note that several of the keyboard shortcuts relate to comments. See **here** 1141 for a comprehensive list of available shortcuts.

5.5.1 Flatten Comments

Flatten Comments

Click **Flatten Comments** to flatten comments and annotations to the base content layer of documents:
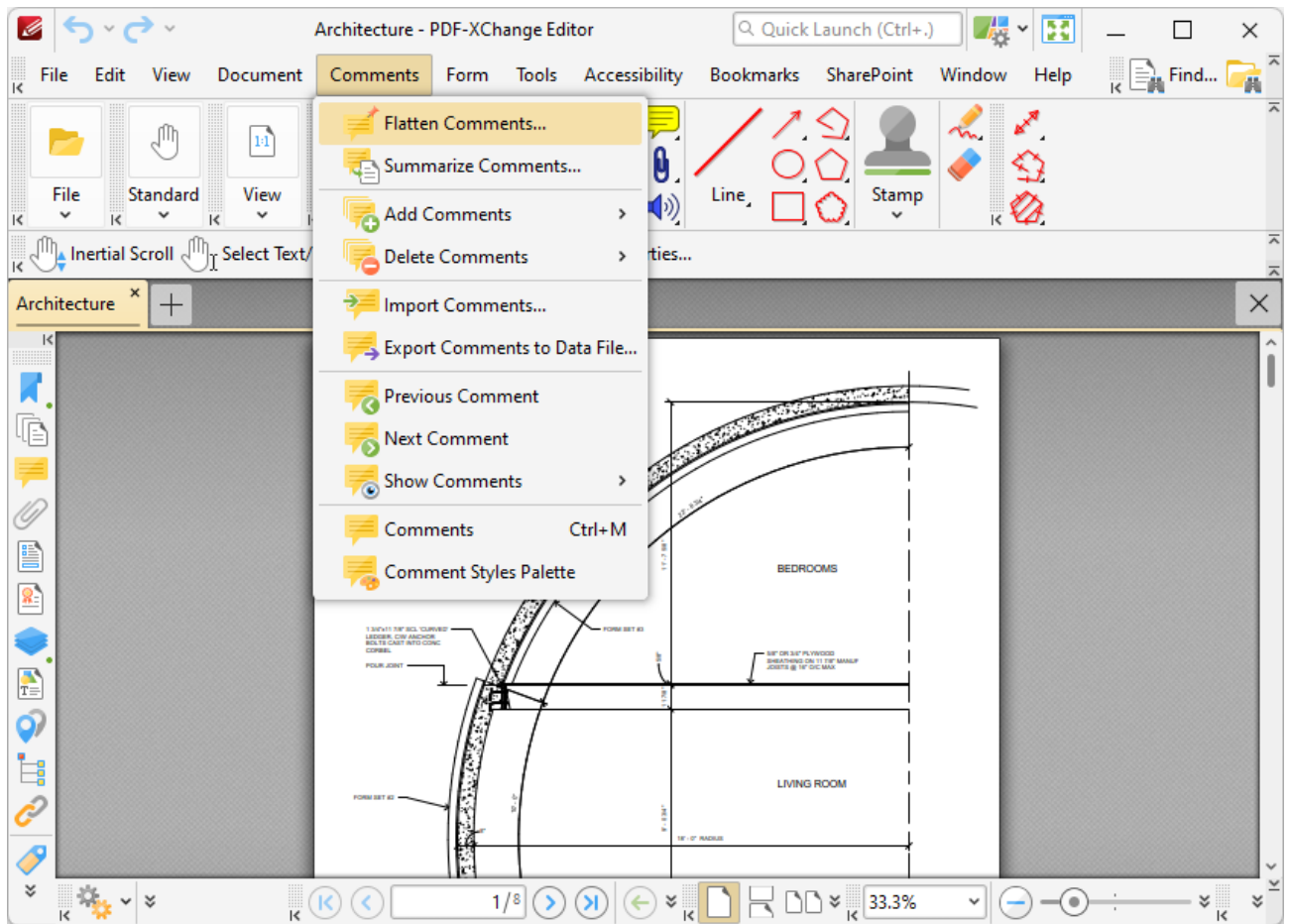
Figure 1. Comments Tab Submenu, Flatten Comments

The **Flatten Annotations** dialog box will open:
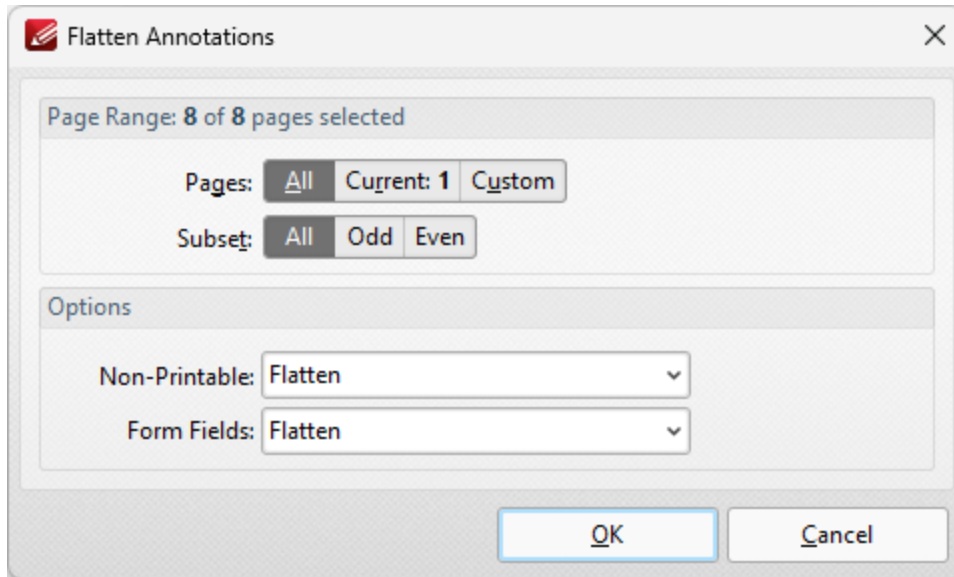
Figure 1. Flatten Annotations Dialog Box

- Use the **Page Range** options to determine the page range in which comments are flattened:
  - Select **All** to flatten comments/annotations on all pages.
  - Select **Current Page** to flatten comments/annotations on only the current page.
  - Use the **Pages** box to specify a custom page range in which to flatten comments/annotations. Further information on the specification of page ranges is available **here.** [1274]
  - Use the **Subset** option to specify a subset of custom page ranges. Select **All Pages, Odd Pages Only** or **Even Pages Only** as desired.
- Use the **Non-Printable** and **Form Fields** options to determine the outcome of the flattening process for non-printable annotations and form fields. (The **Properties** options for comments/annotations can be used to determine whether or not they are printable):
  - Select **Flatten** to flatten content
  - Select **Left as Is** to retain the existing state of content.
  - Select **Remove** to remove the content from the document.

Click **OK** to flatten comments.

5.5.2 Summarize Comments

Summarize Comments

Click **Summarize Comments** to create a summary of document comments:
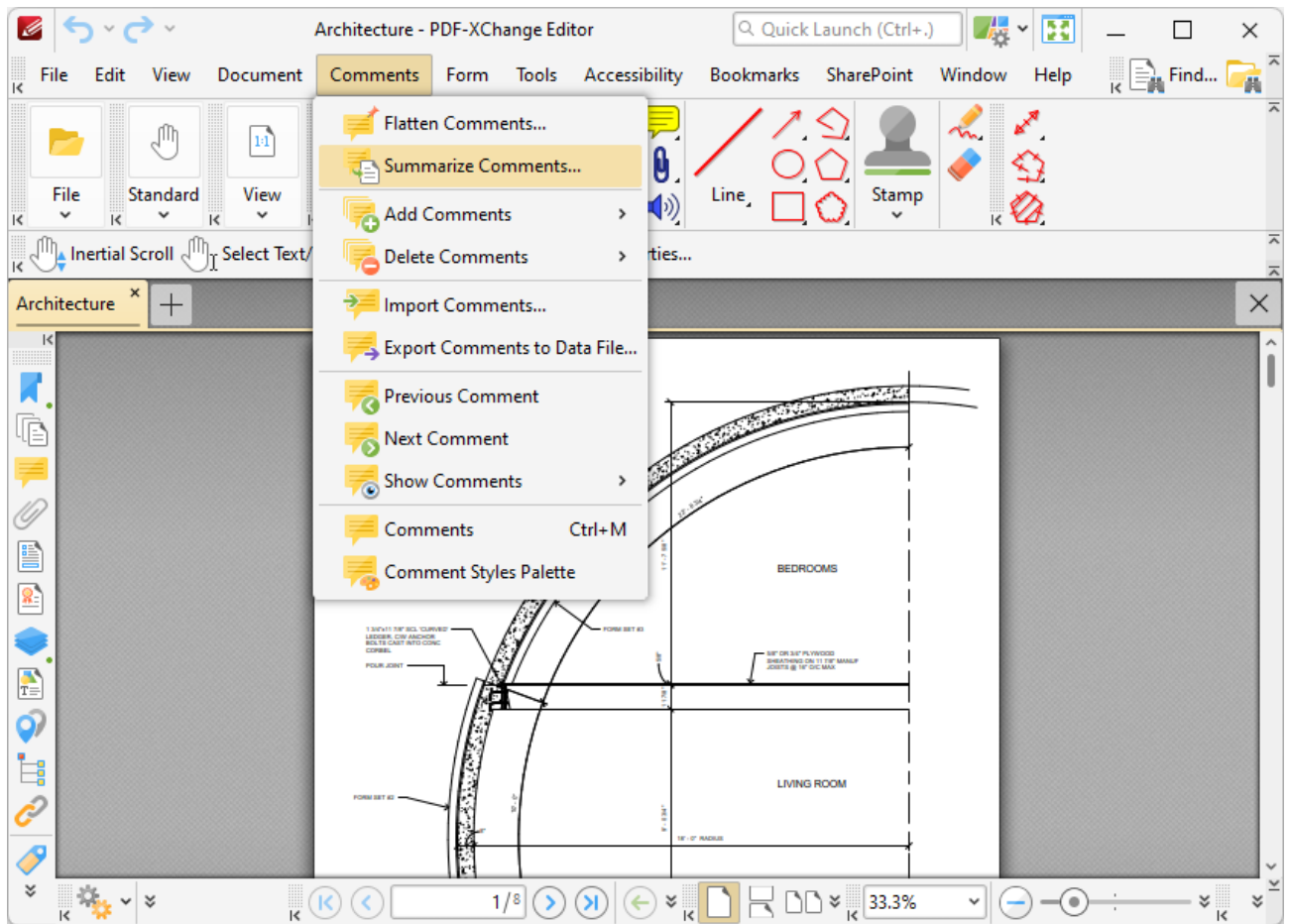
Figure 1. Comments Tab Submenu, Summarize Comments

The **Summarize Comments** dialog box will open:
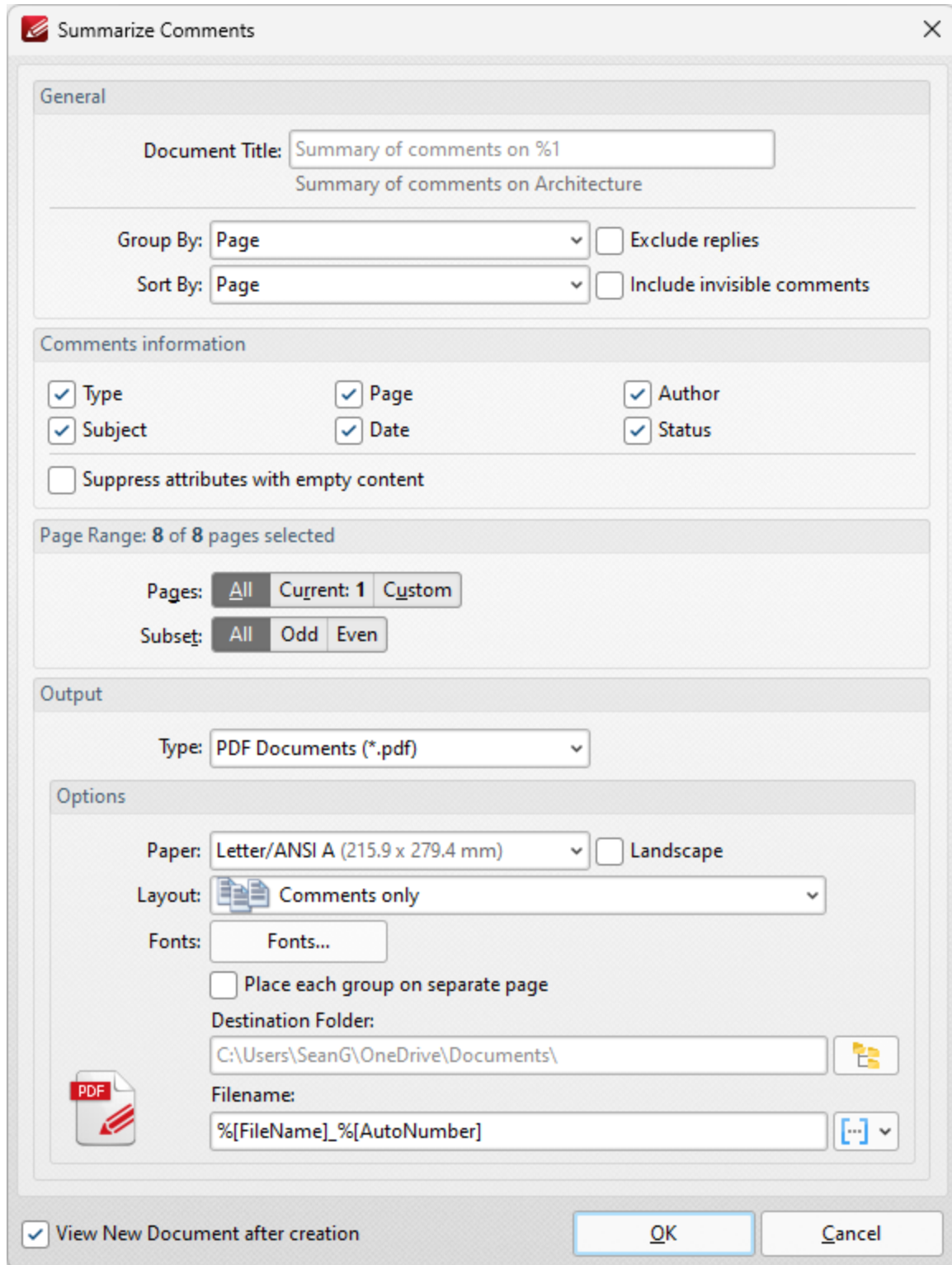
Figure 1. Summarize Comments Dialog Box

- Use the **Group by** and **Sort By** dropdown menus to determine how comments are grouped and summarized:
    - Select **Page** to group/sort comments by page.

- Select **Type** to group/sort comments by type.
- Select **Author** to group/sort comments by author.
- Select **Date** to group/sort comments by date.
- Select **Subject** to group/sort comments by subject.
- Select **Visual Order** to sort comments by their visual order.
- 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.
- Use the **Page Range** settings to determine the page range from which the comment summary comes:
  - Select **All** to include all pages.
  - Select **Current** to use only the current page.
  - Select **Custom** to use a custom page range, then ensure the desired page range in the number box. Further information on the specification of page ranges is available **here.** `1274`
  - Use the **Pages** box to specify a custom page range.
  - Use the **Subset** option to specify a subset of custom page ranges. Select **All Pages, Odd Pages Only** or **Even Pages Only** as desired.
- Use the **Output** dropdown menu to determine the format of the summary.
- Use the **Options** dropdown boxes to determine customizable options for the selected output format:
  - Use the **Paper** dropdown menu to determine the paper size used.
  - Use the **Layout** dropdown menu to determine the layout used.
  - Click **Fonts** to determine the fonts used for the summary.
- Use the **Destination Folder** text box to determine the destination folder for the summary, or click the icon to select a folder on the local computer.
- Use the **Filename** text box to determine the name of the summary. Click the macro dropdown menu to add **macros** `1157` as desired.
- Select the **View New Document after creation** box to open the document when the process is complete.

Click **OK** to create the summary.

N.b. Text that the **Highlight, Strikeout** and **Underline Tools** have been used to annotate is not included in comment summaries by default. Add text to the pop-up note of these annotations in order to include them in the comment summary. (This is true for all comments that feature pop-up notes). There is an option in the **Commenting Preferences** `250` that automatically adds annotated text to the associated pop-up note of annotations.

5.5.3   Add Comments

Add Comments

Hover over **Add Comments** to view options for adding comments to documents:
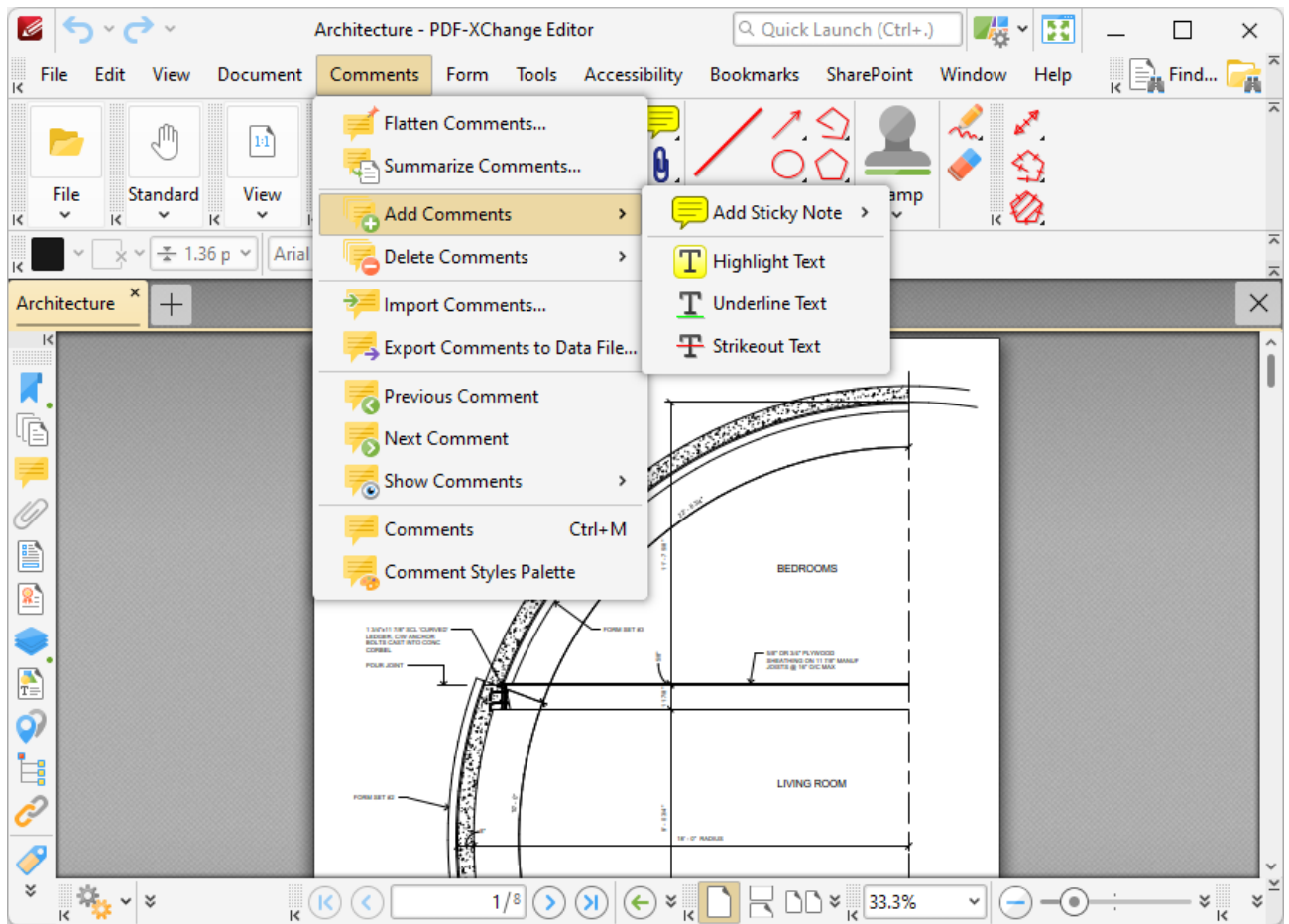
Figure 1. Comments Tab Submenu, Add Comments Options

- Click **Add Sticky Note** to add a sticky note at the center of the current view. Further information about the **Sticky Note Tool** is available **here.** [849]
- Click **Highlight Text** to add a highlight annotation to selected text in the document. Further information about the **Highlight Text Tool** is available **here.** [869]

- Click **Underline Text** to add an underline annotation to selected text in the document. Further information about the **Underline Text Tool** is available here.⁸⁷⁷
- Click **Strikeout Text** to add a strikeout annotation to selected text in the document. Further information about the **Strikeout Text Tool** is available here.⁸⁷³

5.5.4 **Delete Comments**

Delete Comments

Hover over **Delete Comments** to view options for deleting comments in documents:
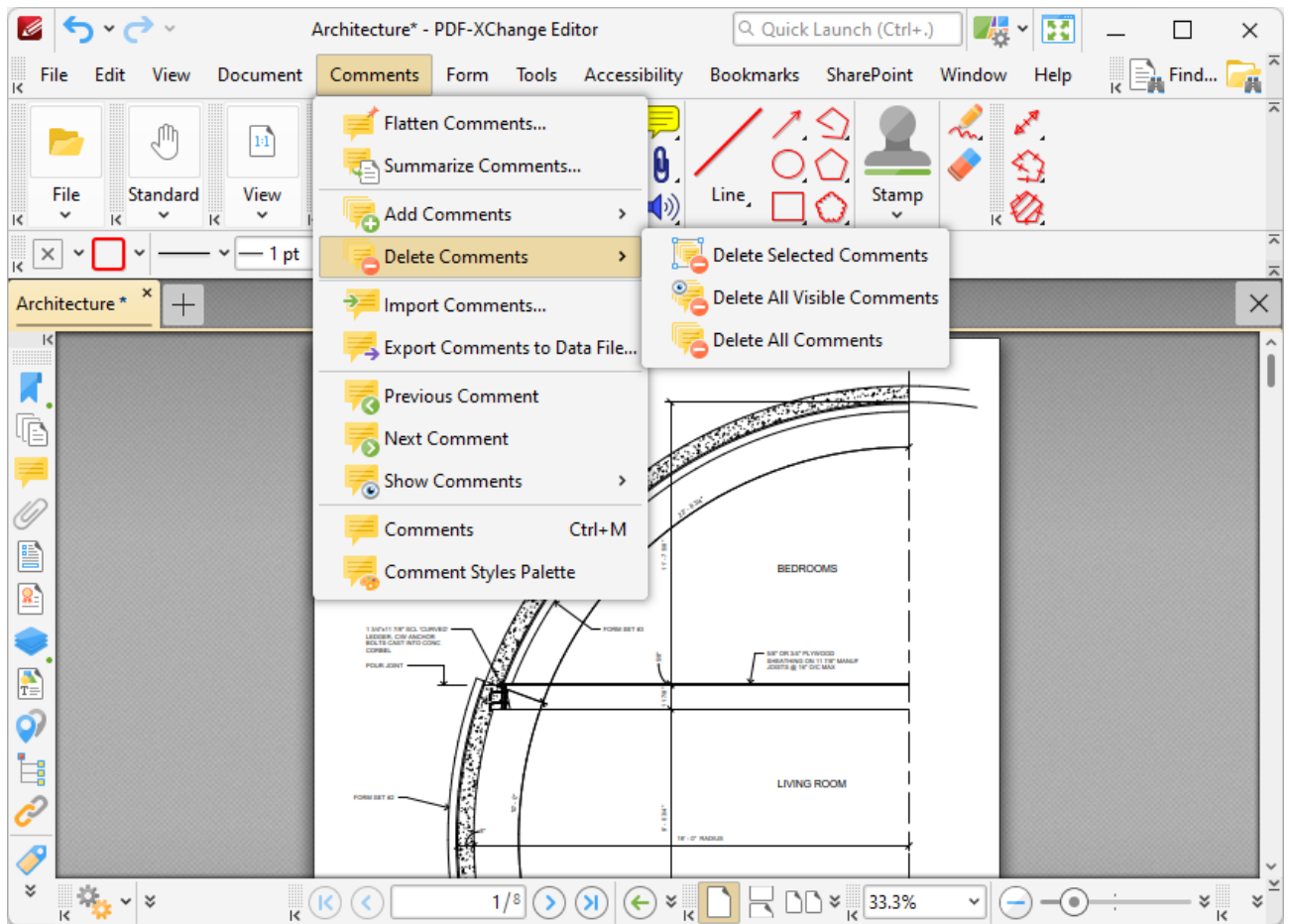
Figure 1. Comments Tab Submenu, Delete Comments Options

- Click **Delete Selected Comments** to delete selected comments in documents.
- Click **Delete All Visible Comments** to delete all visible comments in documents.
- Click **Delete All Comments** to delete all comments in documents.

5.5.5   Import Comments

Import Comments

Click **Import Comments** to import comments into the active document:
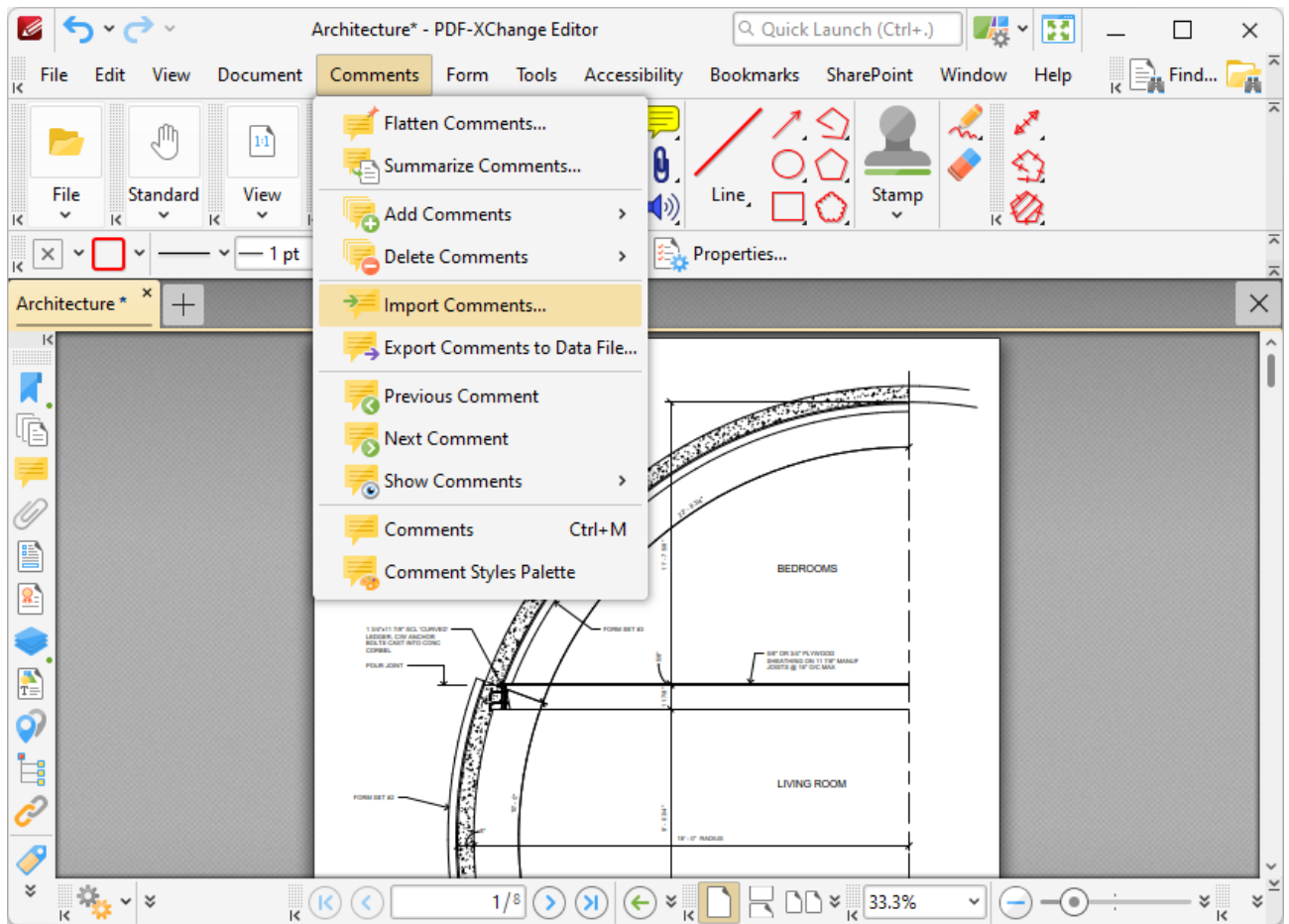
Figure 1. Comments Tab Submenu, Import Comments

The **Open Files** dialog box will open. Select the desired file and click **Open** to import comments.

Comments can be imported from **(*.fdf)** or **(*.xfdf)** files. FDF format is the file format used to submit, receive and incorporate 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. Use the **Export Comments to Data File** 786 feature of **PDF-XChange Editor** to export document comments to **(*.fdf)** or **(*.xfdf)** files.

Please note that the document location of imported comments matches that of the file used for the import. If comments appear to be placed incorrectly then it is probable that the source and recipient files are different in format. For example, if comments from a ten-page document are imported into a two-page document, then comments from only the first two pages will be imported.

5.5.6 **Export Comments to Data File**

 Export Comments to Data File

Click **Export Comments to Data File** to export comments from the active document to **(*.fdf)** or **(*.xfdf)** files:
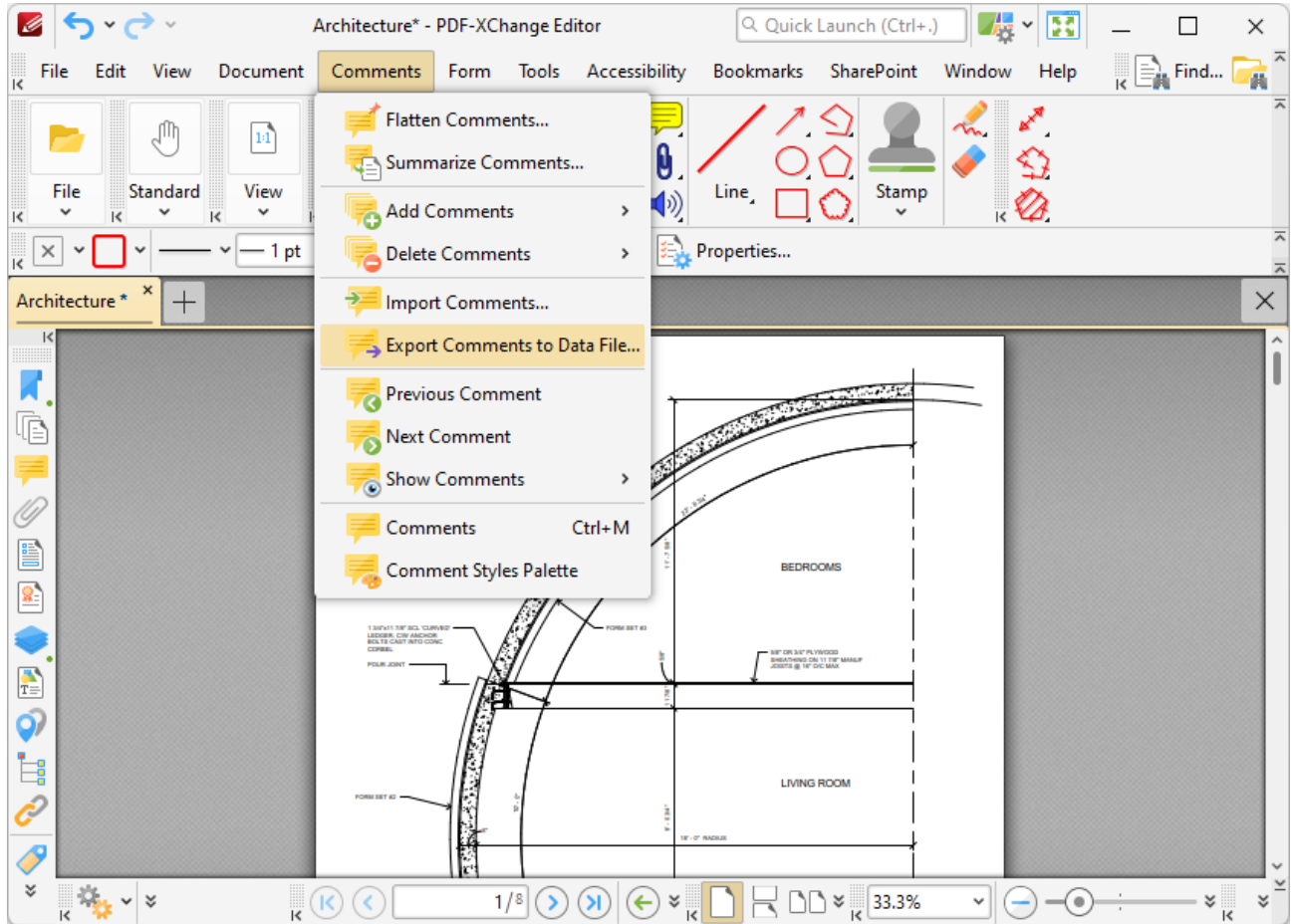
Figure 1. Comments Tab Submenu, Export Comments to Data File

The **Save File** dialog box will open. Enter the desired file name and location, then click **Save** to export and save the document comments.

5.5.7   **Show Comments**

Show Comments

Hover over **Show Comments** to view comment display options:
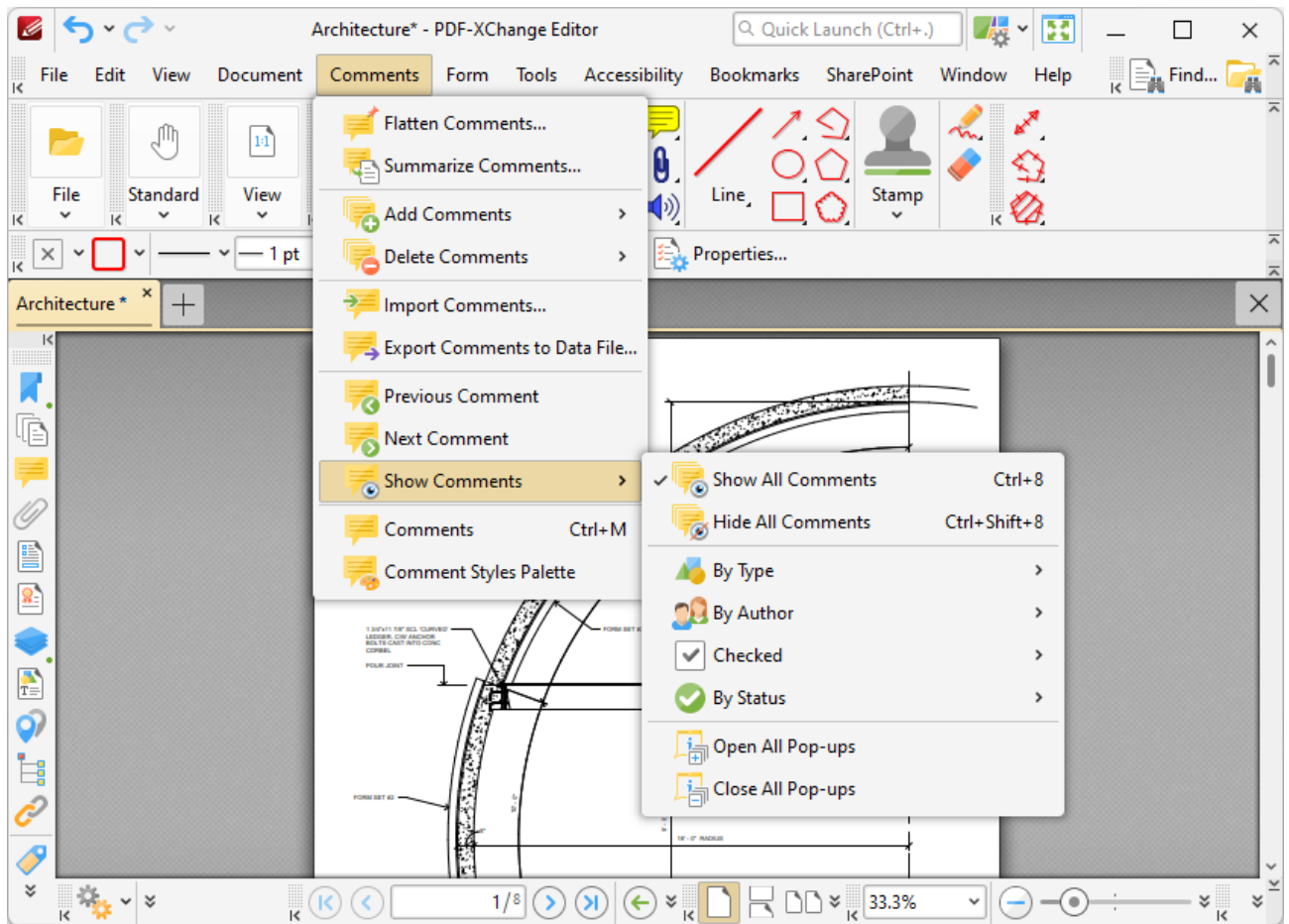
Figure 1. Comments Tab Submenu, Show Comments Options

These options are used to determine the display options for comments and comment pop-ups:

- Click **Show All Comments/Hide All Comments** to show/hide all document comments.

- Hover over **By Type** to determine comment display options according to their format. A submenu containing all comment formats in the document will be displayed. Select the check boxes of the desired comment formats to be displayed.
- Hover over **By Author** to determine comment display options according to their author. A submenu containing all comment authors will be displayed. Select the check boxes of the desired comment authors to be displayed.
- Hover over **Checked** to determine comment display options according to their checked/unchecked status in the **Comments Pane.** 519 (Please note that each comment in the **Comments** pane features a check box, and it is these check boxes that are referenced with regard to this setting). A submenu containing all available options will be displayed. Select the check boxes of the desired comment statuses to be displayed.
- Hover over **By Status** to determine comment display options according to their current editing status. (Right click comments and hover over **Status** in the submenu to view/edit the editing status of comments. The options are **None, Accepted, Cancelled, Completed** and **Rejected.** Click options to set them as the comment editing status). A submenu containing all available options will be displayed. Select the check boxes of the desired comment statuses to be displayed.
- Select **Open All Pop-ups** or **Close All Pop-ups** to open/close the pop-up annotations of all comments.

5.5.8   **Comments**

 Comments

Click **Comments** (or press Ctrl+M) to open the **Comments Pane** [519]:
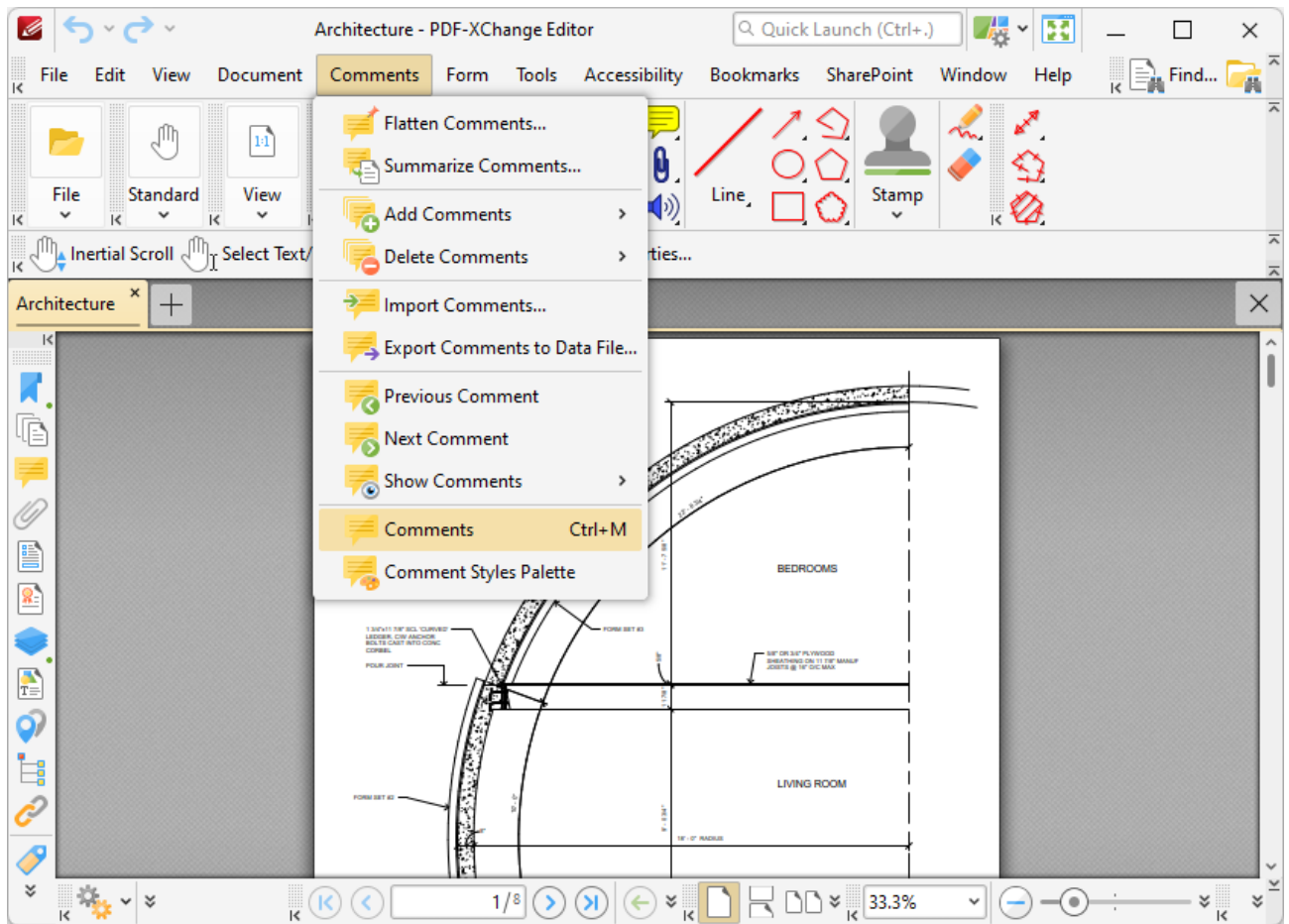
Figure 1. Comments Tab Submenu, Comments

The **Comments** pane is detailed **here.** [519]

5.5.9 Comment Styles Palette

Comment Styles Palette

Click **Comment Styles Palette** to open the **Comment Styles Palette**:
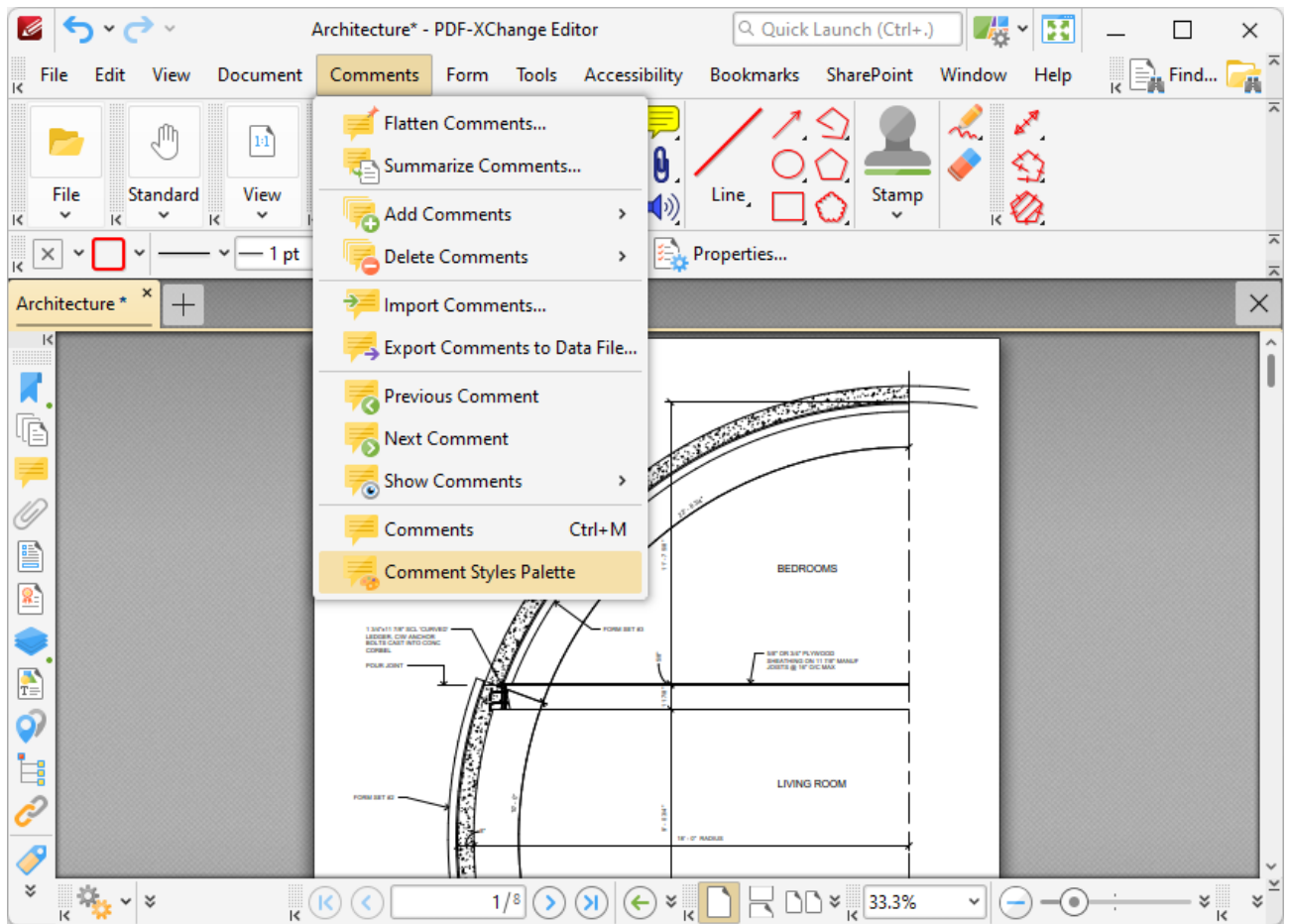
Figure 1. Comments Tab Submenu, Comment Styles Palette

The **Comment Styles Palette** will open:
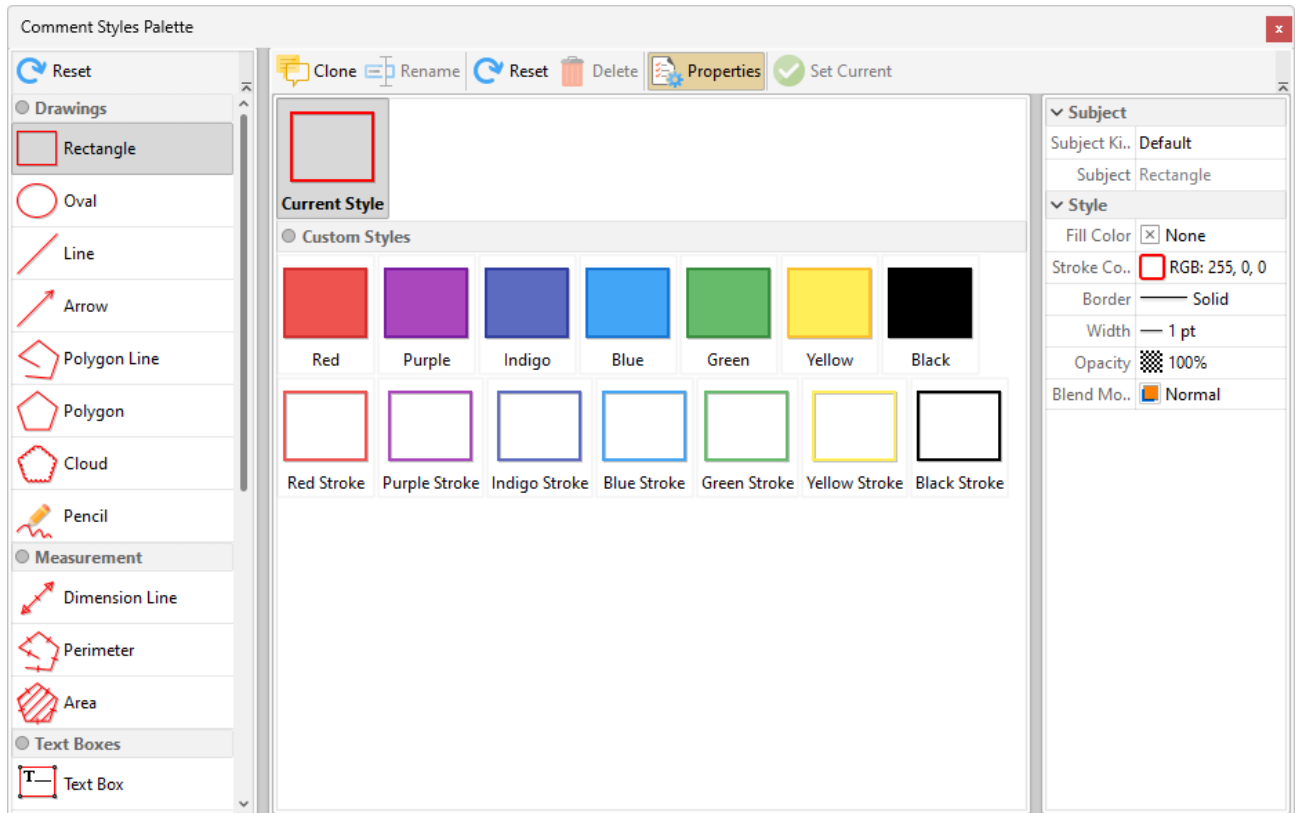
Figure 2. Comment Styles Palette

The **Comment Styles Palette** details current comment styles. Click comment formats in the pane on the left to view available comment styles. Several default comment styles are available for each format, and they are displayed in the central pane. Double-click to select styles (which will also update selected annotations in the current document). The following options are then available:

- Click **Clone** to clone the selected style. This feature creates a duplicate of styles in order to enable editing without the loss of the existing style. The cloned style will appear in the **Comment Styles Palette.** Select it and then click **Properties** to edit the properties of the style. Available properties depend on the annotation format. All available properties are detailed **here.** 1292
- Click **Rename** to rename the selected style, then enter the new name in the **Rename Comment Style** dialog box and click **OK.**
- Click **Reset** to reset the selected style to its default values.
- Click **Delete** to delete the selected style.
- Click **Set Current** to set the selected style selected as the active style for the tool. The active style is displayed in tool icons in the **Comment Toolbar.** 317

5.6   Form

 Form

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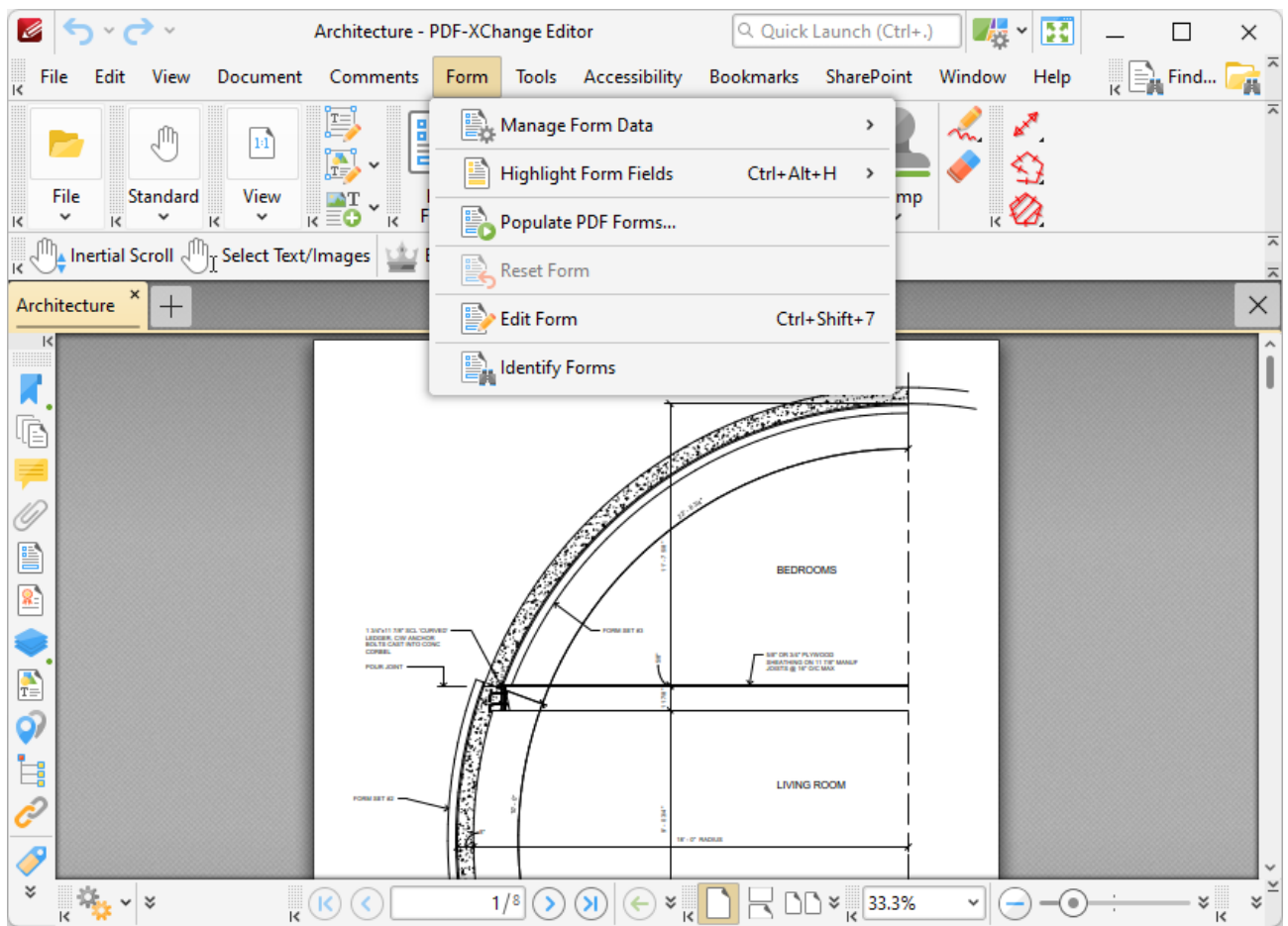
Figure 1. Form Tab Submenu

These options facilitate the editing of **Form Fields:** 319

- Hover over **Manage Form Data** to view options for **Form Data:**

- Click **Import Form Data** to import data into the forms of the current document. The **Open Files** dialog box will open. Select the desired files and click **OK** to import form data. Please note that the field names of forms must match in order for form data to be imported. For example, if there are three forms in the file from which data is imported that have the field names **'Text1', 'Text2'** and **'Text3'** respectively, then the current document must feature forms with the same field names in order for form data to import. The field name property can be viewed/edited in the **Properties** pane for forms, as detailed **here.** 328
- Click **Export Form Data** to export all data from the forms of the current document. The **Save File** dialog box will open. Enter a name for the new file in the text box, then select a file format from the **Save as type** dropdwon menu and click **Save** to export the form data.
- Click **Email Form Data** to email the current document form data. The **PDF-XChange Editor** dialog box will open. Select the desired file format and then click **OK** to email the form data. **PDF-XChange Editor** will use the current email method as defined in the **Send Mail** 297 preferences to email the form data. Please note that only the form data is sent, and not the form itself. Recipients of these emails can use the **Import Form Data** option detailed above to import the form data.
- Click **Highlight Form Fields** to highlight all form fields in the active document. Hover over **Highlight Form Fields** to view the **Highlight Form Fields** submenu:
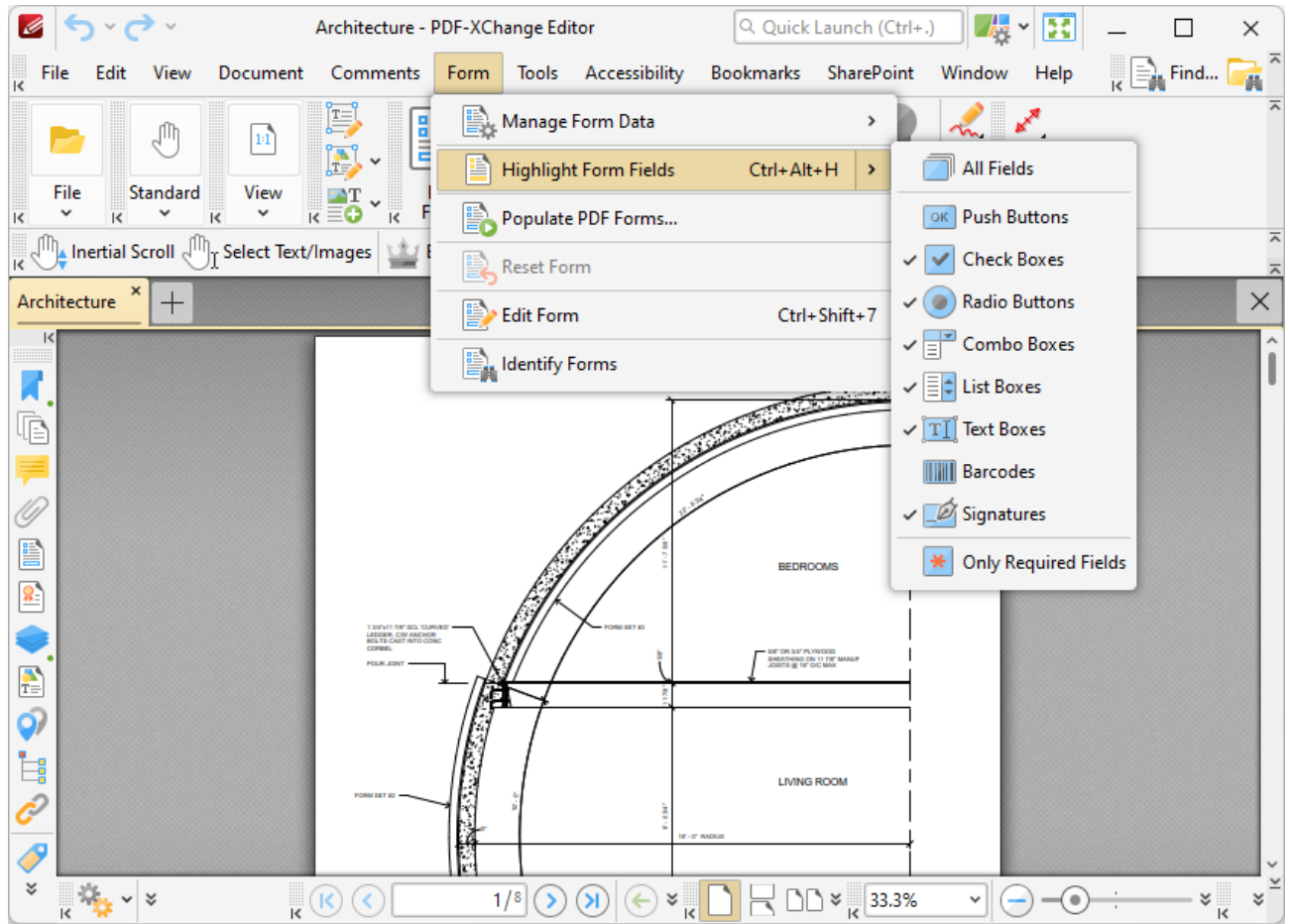
Figure 2. Form Tab Submenu, Highlight Form Fields Submenu Options

Select either **All Fields, Only Required Fields** or a combination of the desired field formats for highlighting.

- Click **Populate PDF Forms** to create and populate PDF forms with data from a .csv (comma separated values) file, as detailed **here.** 796
- Click **Reset Form** to reset all forms in the document.
- Click **Edit Form** to enable the editing/creation of forms, as detailed **here.** 319
- Click **Identify Forms** to form fields in documents that have been converted to PDF, as detailed **here.** 801

5.6.1   Populate PDF Forms

 Populate PDF Forms

Click **Populate Forms** to create and populate forms with data from a .csv (comma-separated-values) file:
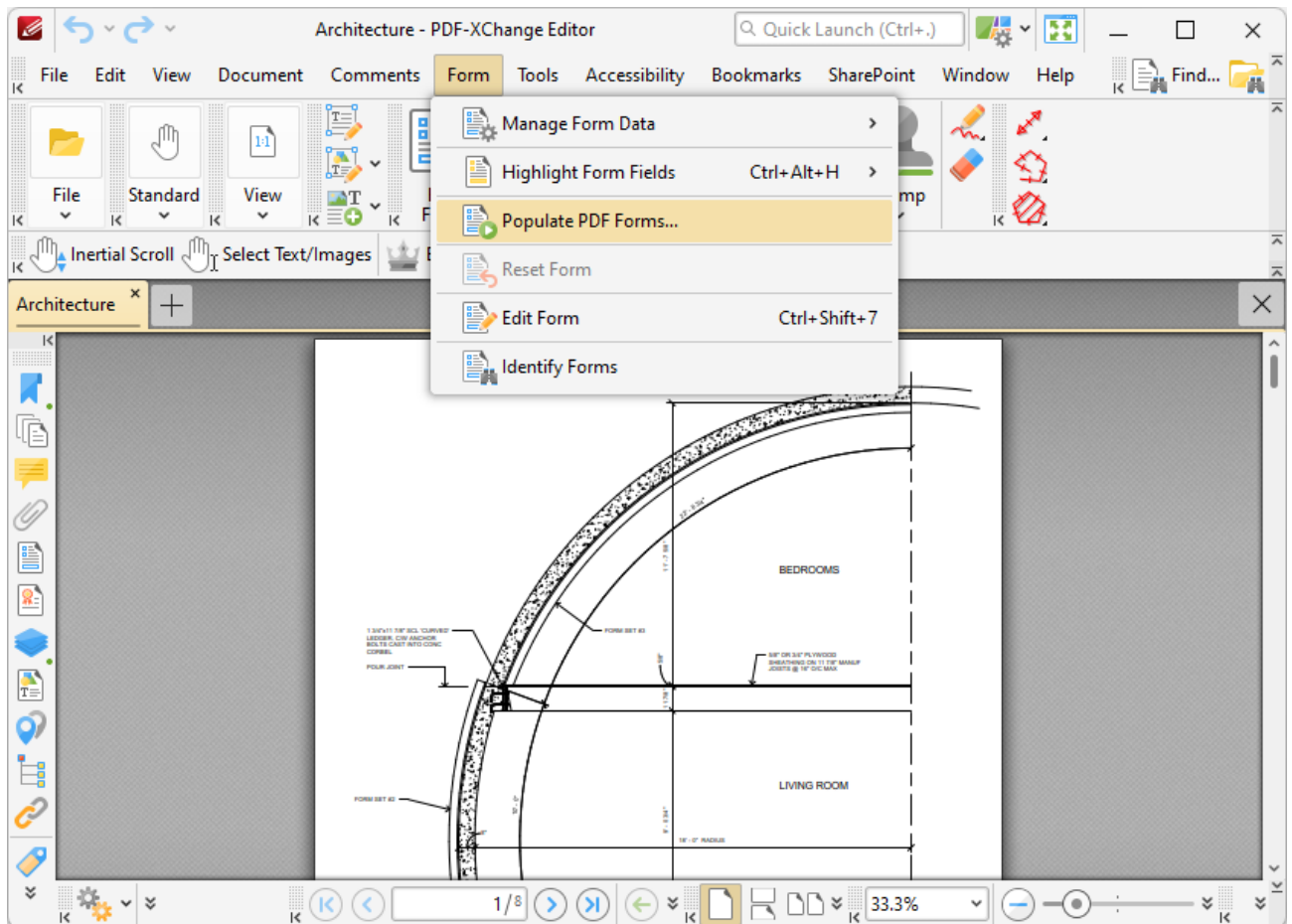
Figure 1. Forms Tab, Populate Forms

The **Populate PDF Forms** dialog box will open:
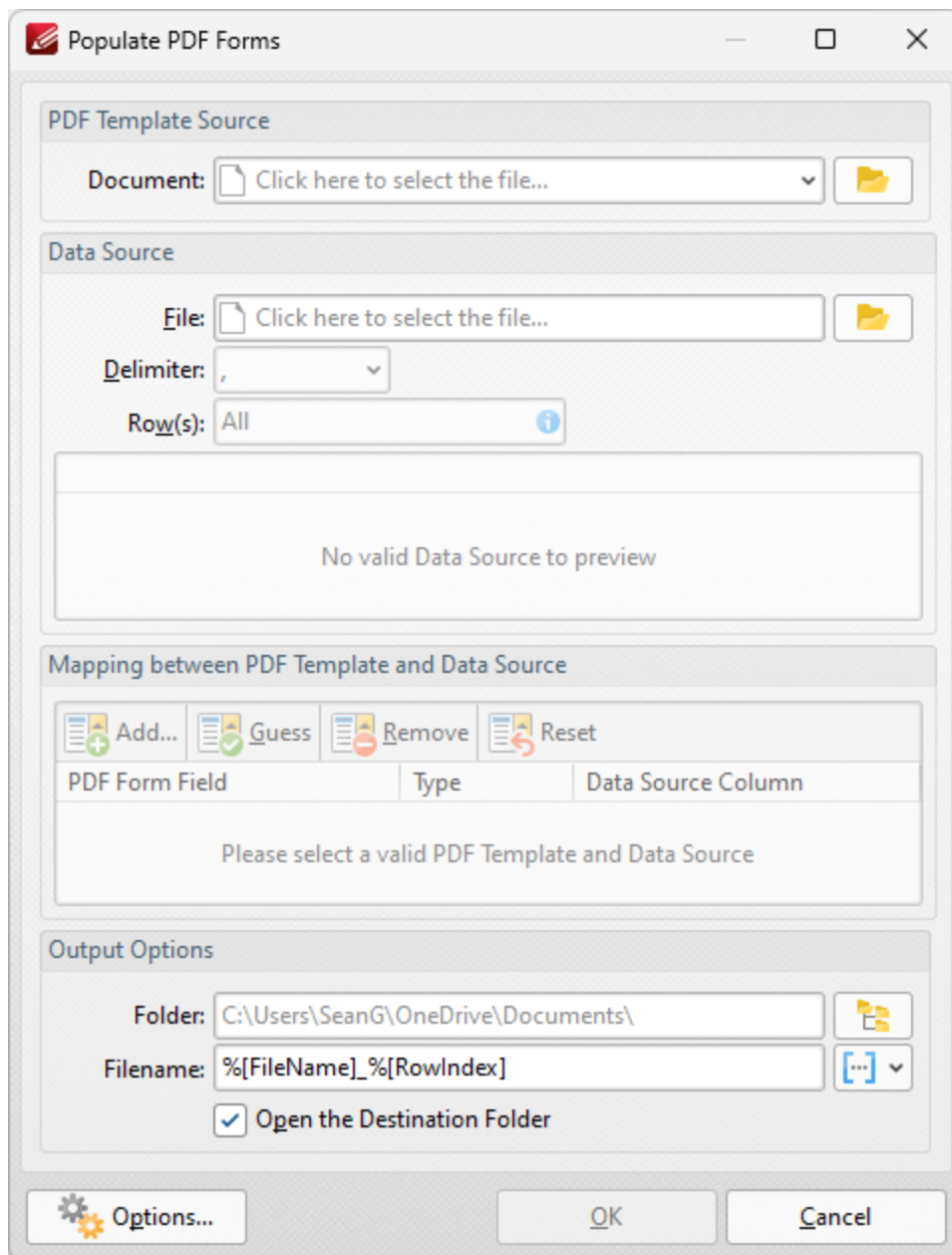
Figure 2. Populate PDF Forms Dialog Box

- Use the **Document** dropdown menu to determine the template used to create the form.
- Use the **File** dropdown menu to determine the file used to populate the form fields in the output document, and the **Delimiter** dropdown menu to determine the delimiter used to define files and values in the data source document. If you want to specify image files to be used to populate form fields then you must specify the full file name of the image in the input file. Note that it is only necessary to specify the delimiter when plain text files are used, and it may be necessary to add these delimiters before the document is used for this feature.
- Use the **Rows** dropdown menu to determine the rows of information used in cases where the source document contains more than one set of form information.

When you have selected a template and a data source file, the **Mapping between PDF Template and Data Source** section will display the form fields from the template file in the left column:
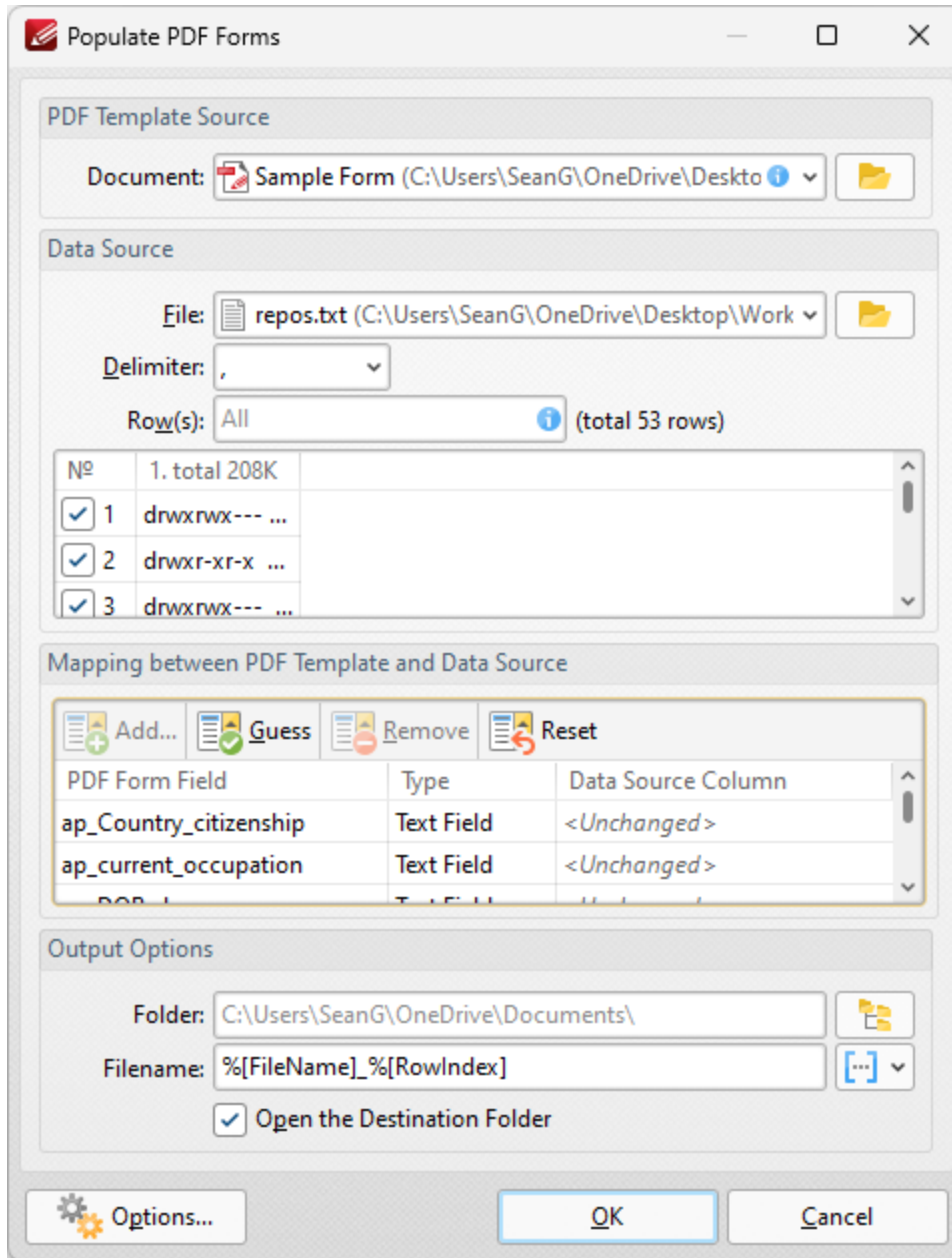
Figure 3. Populate PDF Forms Dialog Box, Data Source Column Selection Active

- Select entries in the **PDF Form Field** column and click **Add** (or click the associated entry in the **Data Source Column)** to add data from the data source file to the selected form field in output documents.
- Click **Guess** to auto-fill forms. This is a useful feature when the names of the forms in the template document match the names of the forms in the data source document, as they will populate automatically with the matching information.
- Click **Remove** to remove selected entries from the **Data Source Column.**

- Click **Reset** to reset all entries in the **Data Source Column.**
- Use the **Destination Folder** dropdown menu to determine the folder for created documents.
- Use the **Filename** dropdown menu to determine the filename of created documents. Note that you can use **macros** 1157 when creating the file name. Two of the available macros apply specifically to the populate forms feature:
  - **Row Data by Column** uses the form data from either the **Column Index** or the **Column Name** to determine the file name.
  - **Row Index** uses the index values of the rows of data in the data source document to determine the file name.

Click **OK** to create and populate the form.

Click **Options** for additional options:
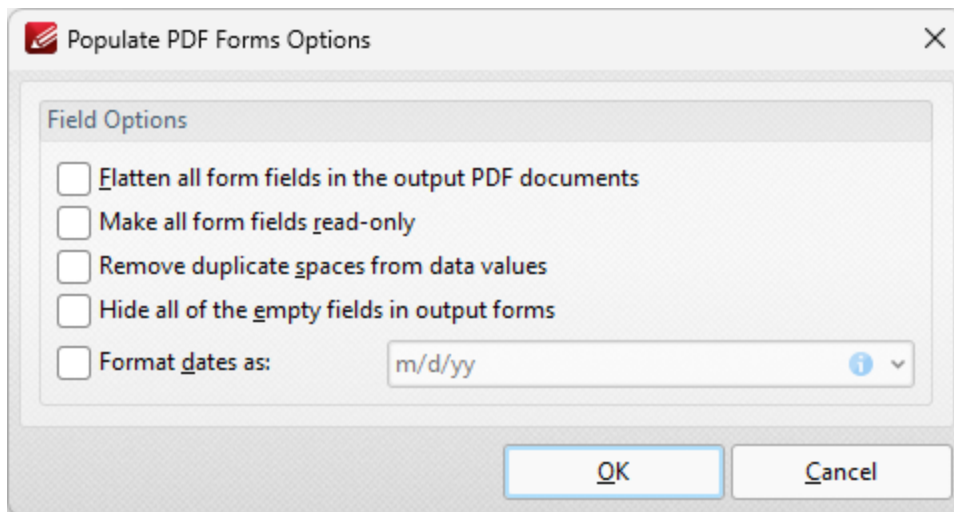
Figure 4. Populate PDF Forms Options

- Select the **Flatten all form fields in the output PDF documents** box to flatten form fields into base content when the output documents are created.
- Select the **Make all form fields read-only** to enable the read-only property of form fields in output documents. This means that form fields cannot be edited unless the read-only property is subsequently disabled.
- Select the **Remove duplicate spaces from data values** box to remove duplicated spaces from data values in output documents.
- Select the **Hide all of the empty fields in output forms** to hide empty fields in output documents.
- Select the **Format dates as** box to specify the use of a date format, then select the desired format in the adjacent dropdown menu.

Click **OK** to save changes.

Note that you can use the **Export Form Data** [793] feature to export data from filled-out forms to **(*.csv)** format for subsequent use as data source files with the **Populate Forms** feature.

5.6.2 **Identify Forms**

Identify Forms

Click **Identify Forms** to identify form fields in documents:
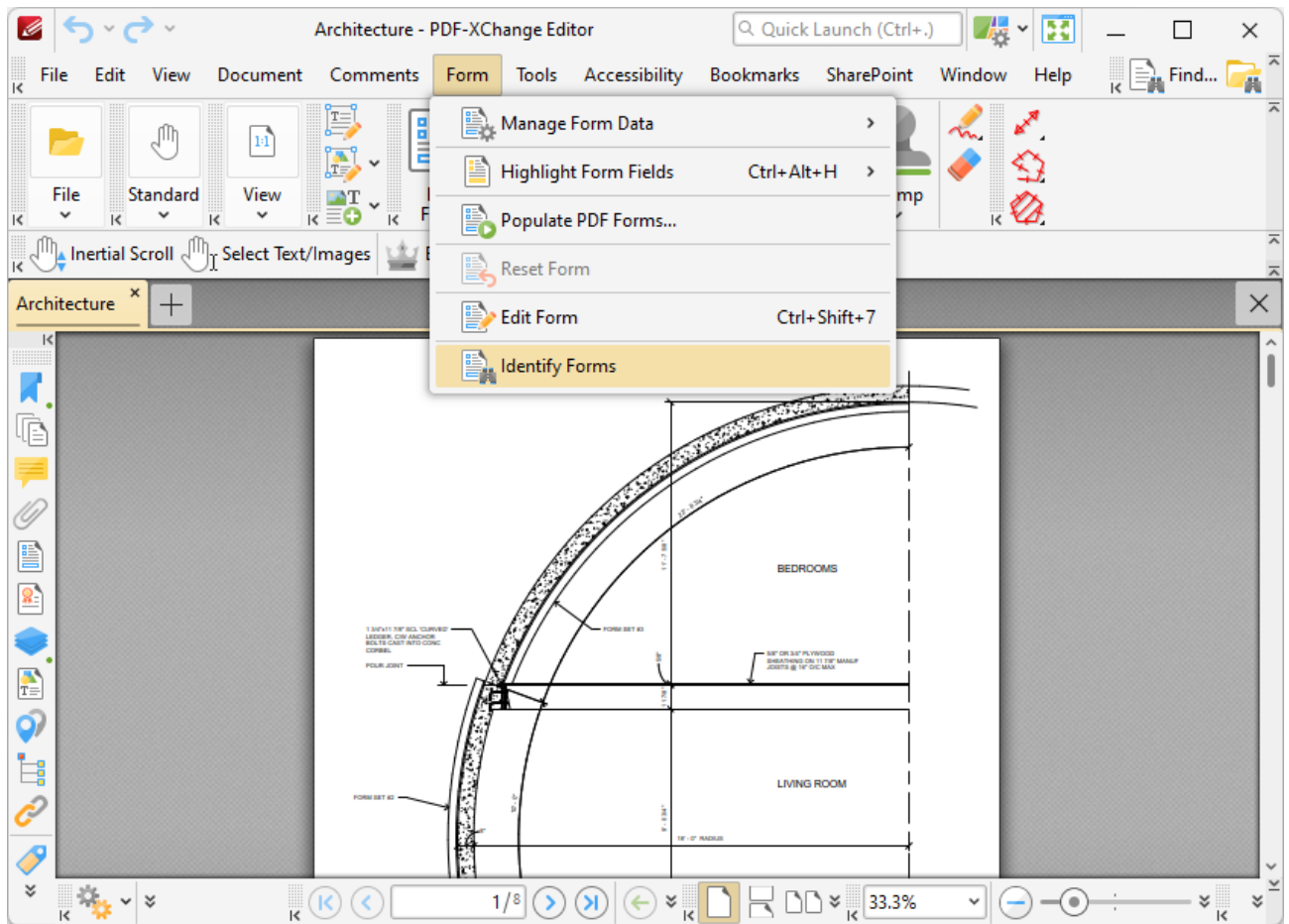
Figure 1. Forms Tab, Identify Forms

This feature is intended to identify content that is structured like form fields (for example in forms converted from other formats to PDF). When it is selected, the **Identify Forms** dialog box will open:
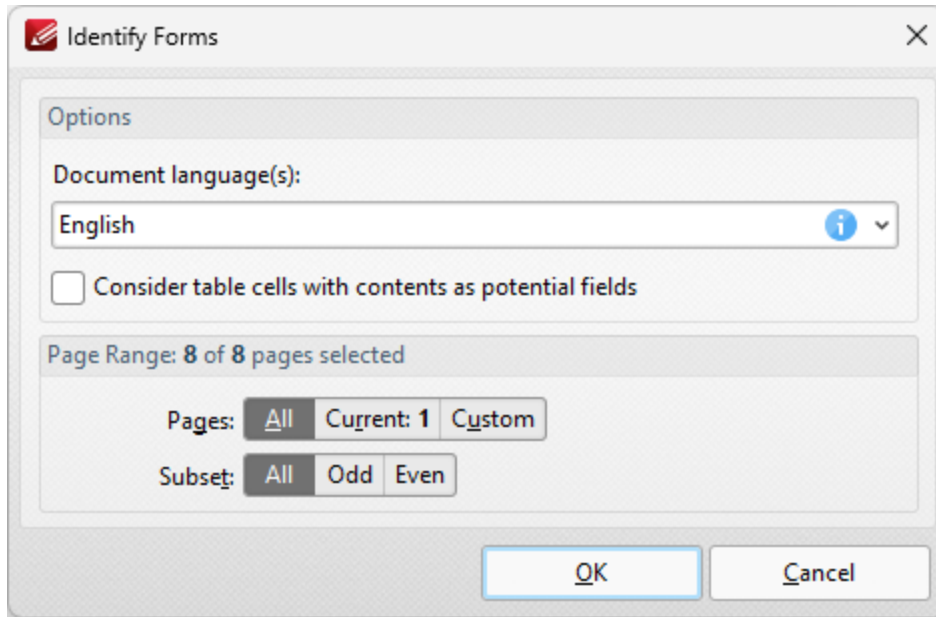
Figure 2. Identify Forms Dialog Box

- Use the **OCR languages** dropdown menu to determine the OCR language used when identifying forms.
- Select the box to include table cells when the OCR engine identifies forms in the document.
- Use the **Pages** option to determine the page range included in the operation. Further information about the specification of page ranges is available **here.** [1274]

Click **OK** to identify forms.

5.7   Tools

Tools

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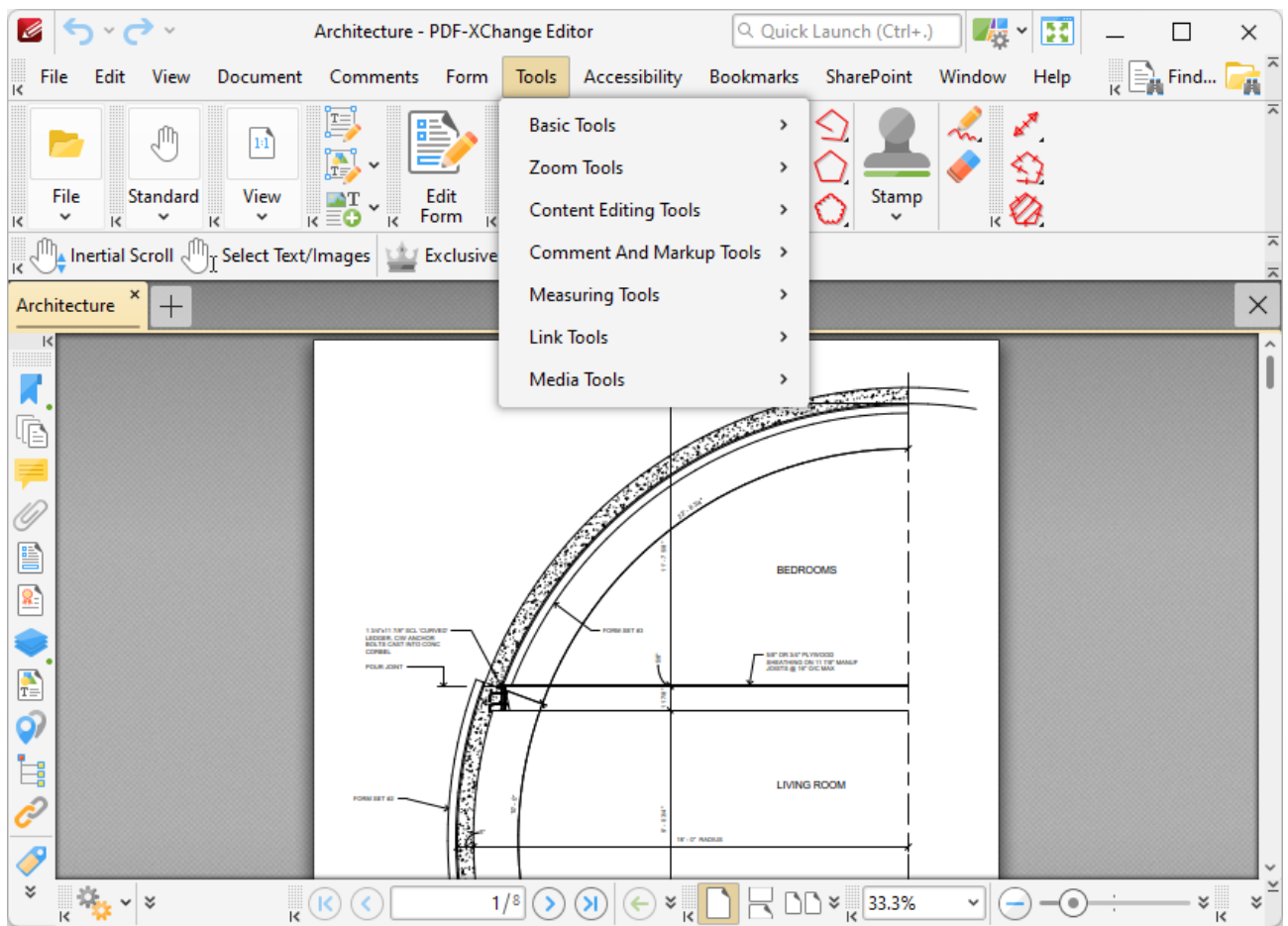
Figure 1. Tools Tab Submenu

The tools in **PDF-XChange Editor** are used to navigate, manipulate, edit, annotate, measure and enhance documents. They are grouped as follows:

- **Basic Tools** 805 - the **Hand Tool, Snapshot Tool** and **Select Text Tool**, which perform the most basic operations in the software - browsing documents, taking snapshots and selecting text.
- **Zoom Tools** 813 - the **Zoom Tool, Loupe Tool** and **Pan and Zoom Feature,** which assist in editing documents via zoom-related features.
- **Content Editing Tools** 823 - the **Edit Objects Tool** and the **Add Tool**, which facilitate the editing of base content and the insertion of text, images and barcodes into documents.
- **Comment and Markup Tools** 844 - nineteen tools that enable the creation of document comments/markups, as well as the **Select Comments Tool,** which is used to select and edit comments. The **Comment Styles Palette** and **Stamps Palette** are also available through this submenu.
- **Measuring Tools** 969 - the **Distance, Perimeter and Area Tools,** which enable the measurement of document dimensions, and the **Set Scale** feature, which is used to calibrate scales to use in conjunction with tools. The **Export Measurements to CSV File** feature is also available in this submenu.
- **Link Tools** 989 - the **Add/Edit Link Tool,** which is used to add dynamic links to documents. The **Create/Remove All Web-Links** features are also available in this submenu.
- **Media Tools** 1023 - the **Add/Edit Video, Sound** and **3D Annotation Tools,** which are used to add/edit video, sound and 3D content in documents.

5.7.1   **Basic Tools**

Basic Tools

Hover over **Basic Tools** to open the following submenu:
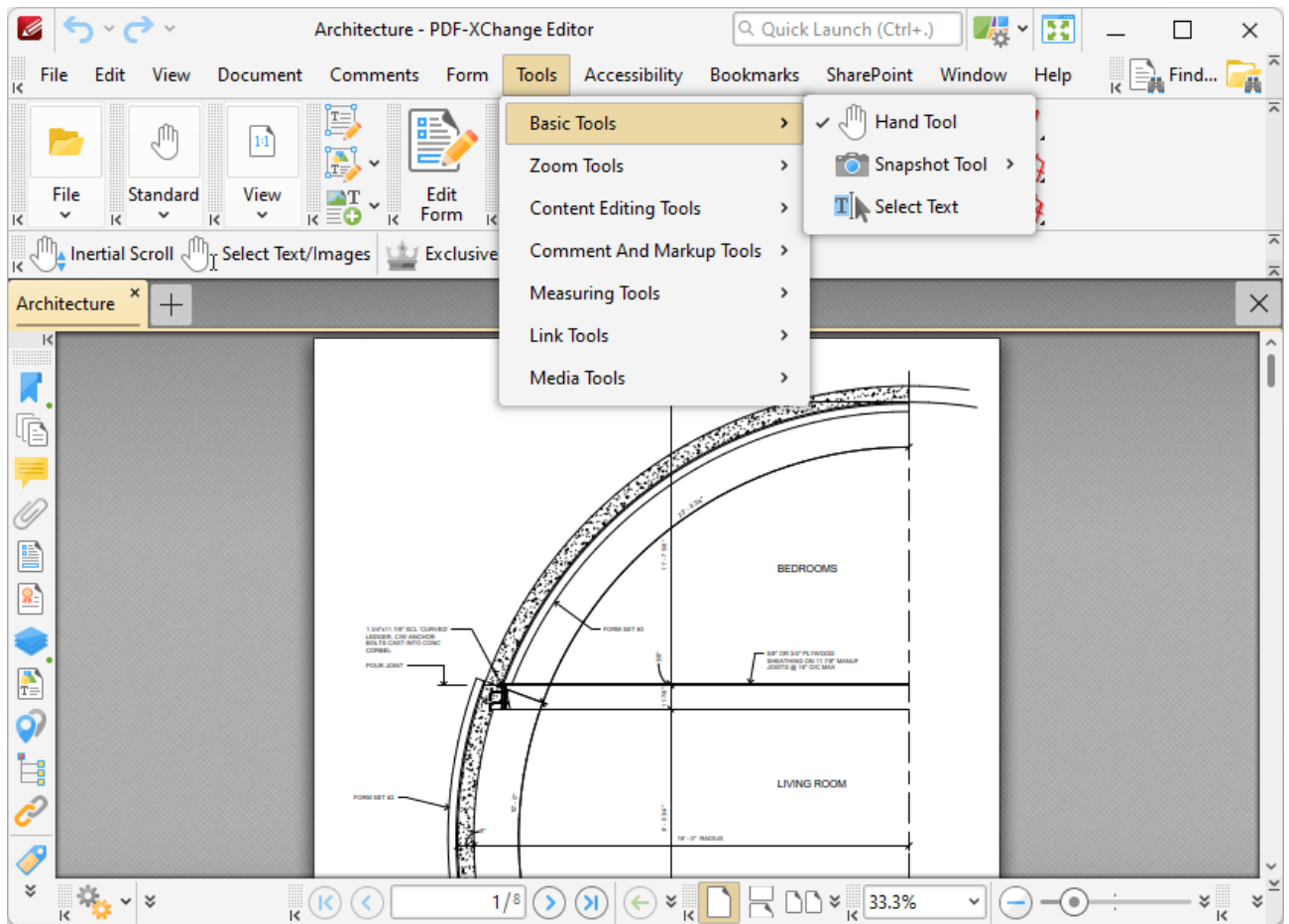
Figure 1. Tools Tab Submenu, Basic Tools

- The **Hand Tool** [807] is the default tool in **PDF-XChange Editor,** and is used to navigate document pages.
- The **Snapshot Tool** [305] is used to create image files from documents/document sections.
- The **Select Text Tool** [811] is used to select and edit document text.

5.7.1.1   Hand Tool

Hand Tool

Click **Hand Tool** to enable this tool:
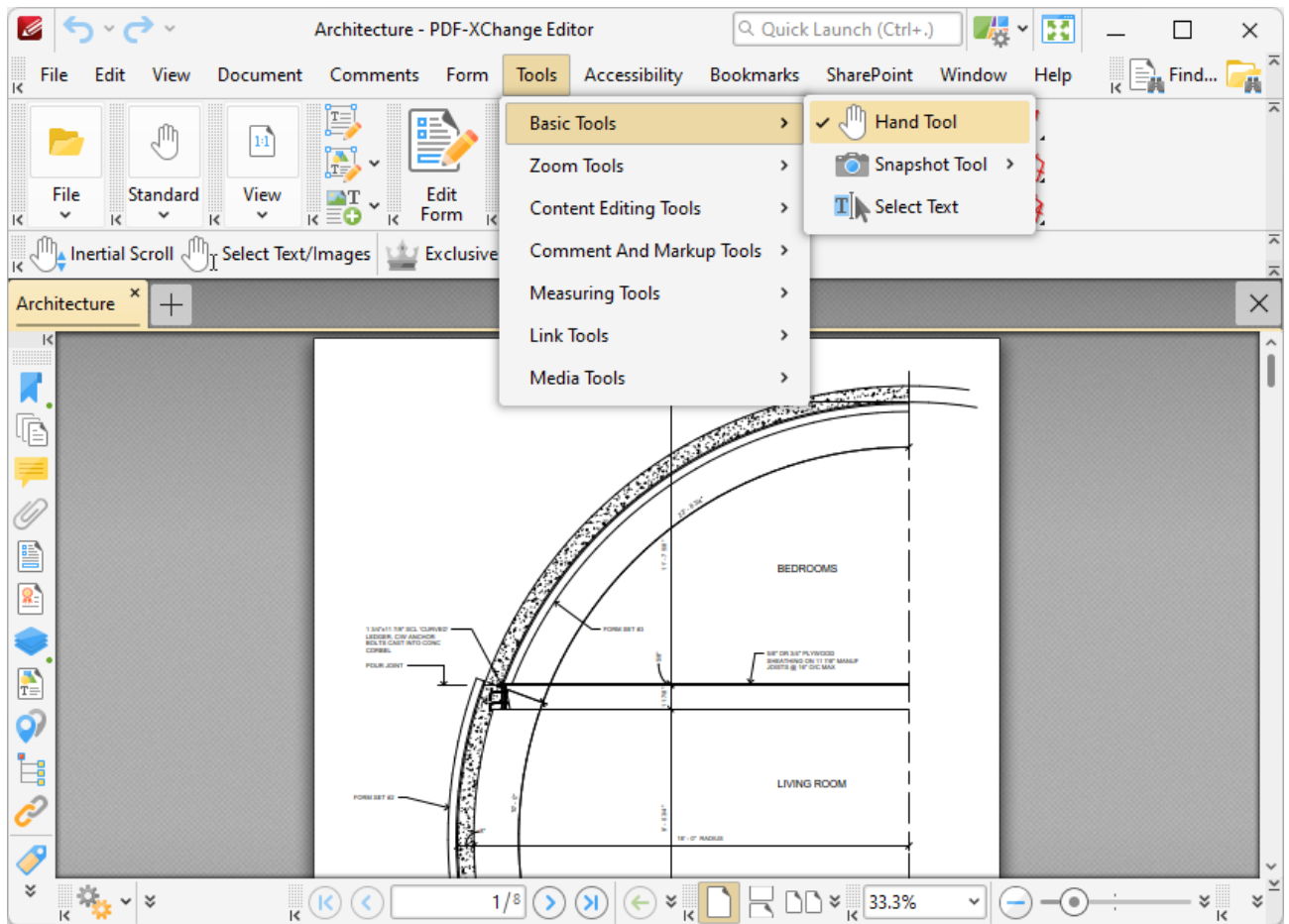
Figure 1. Basic Tools Submenu, Hand Tool

The **Hand Tool** is used as a basic scrolling device and navigation aid when browsing through documents. When it is enabled, click and drag the page in the desired scrolling direction in order to browse through documents.

When this tool is in operation four options are available in the **Properties Toolbar:** 485

- **Inertial Scroll** is used to enhance the **Hand Tool.** When this feature is enabled, document pages will continue to scroll and come to a stop gradually after scrolling actions are performed. When it is disabled document pages will scroll in synchronization with the pointer.
- Click **Select Text/Images** to enable the selection of text and images with the **Hand Tool.** The tool will then be able to select text/images when it is hovered over text-based/image content, and indicates that it is able to do so via a change in the cursor. Click and drag to select text, or click to select images. Note that you can also double/triple/quadruple-click text to select words/paragraphs/all document text. Click outside of selected text/images to cancel the selection. If you are using a touch-based device then tap text to enable text-selection mode, or tap images to select them. Touch outside selected text/images and then move and release in order to cancel the selection mode. If the page has no regions that do not contain text/images, touch on any image then move and release in order to cancel the selection mode, or simply tap outside of the page. Note that if you are using a touchscreen in conjunction with a stylus/digitizer, then the behavior is identical to using a mouse in desktop mode.
- **Exclusive Mode** simplifies the process of using the **Hand Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to browse quickly through documents without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- **Properties** opens the **Properties Pane** to view/edit the properties for the **Hand Tool.** Further information on tool properties is available **here.** ⃞1292

5.7.1.2   Snapshot Tool

Snapshot Tool

Click **Snapshot Tool** to enable this tool:
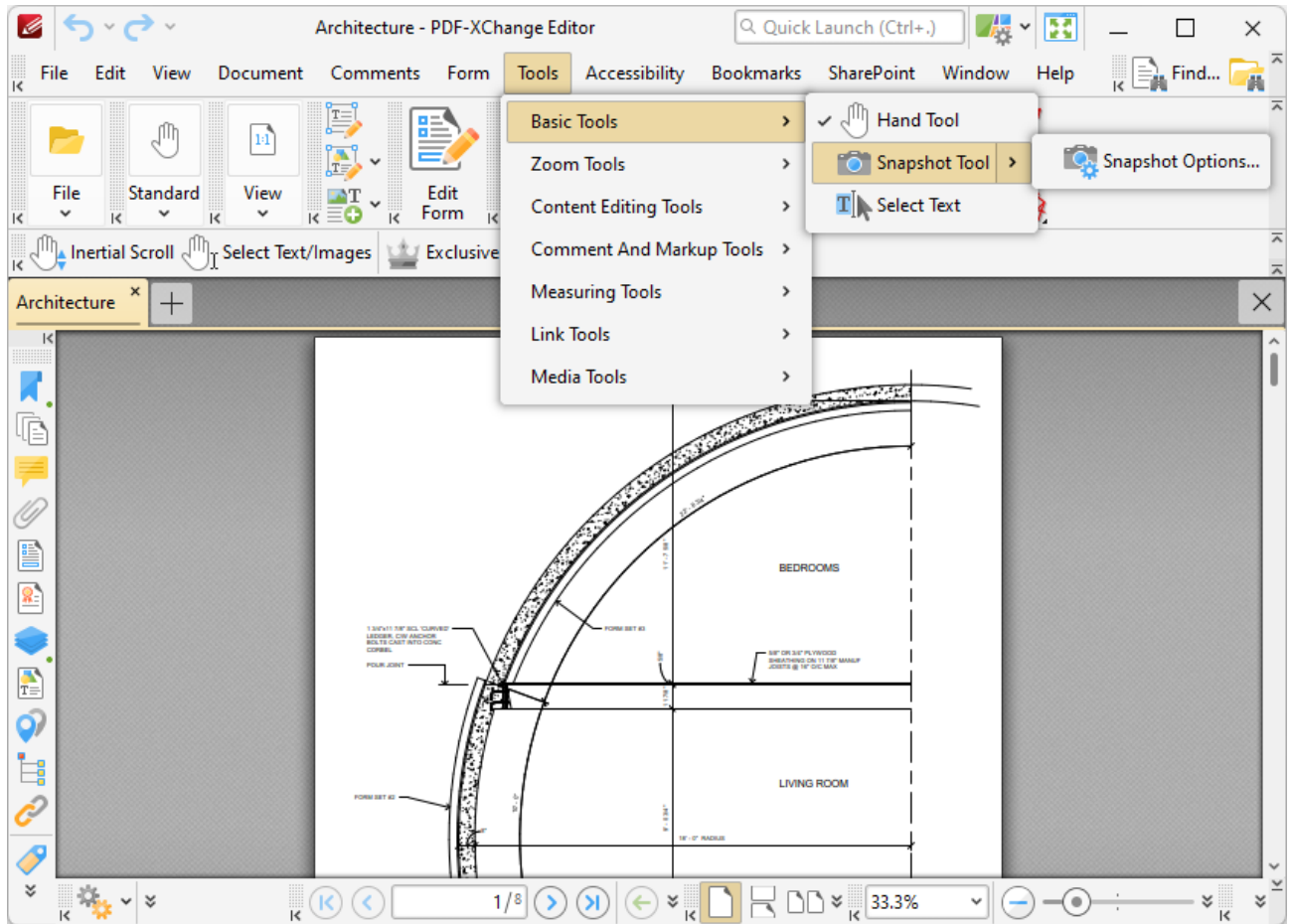
Figure 1. Basic Tools Submenu, Snapshot Tool

The **Snaphsot Tool** is used to take document snapshots. When it is enabled, click pages/objects take snapshots. Alternatively, click and drag the pointer to select a custom page area. Release the mouse button to take a snapshot. A bitmap copy of the selection will be pasted to the clipboard.

Click **Snapshot Options** to determine customizable options for the **Snapshot Tool** in the **Snapshot Tool Preferences,** which are detailed **here.** 305

5.7.1.3   Select Text Tool

Select Text Tool

Click **Select Text** to enable this tool:
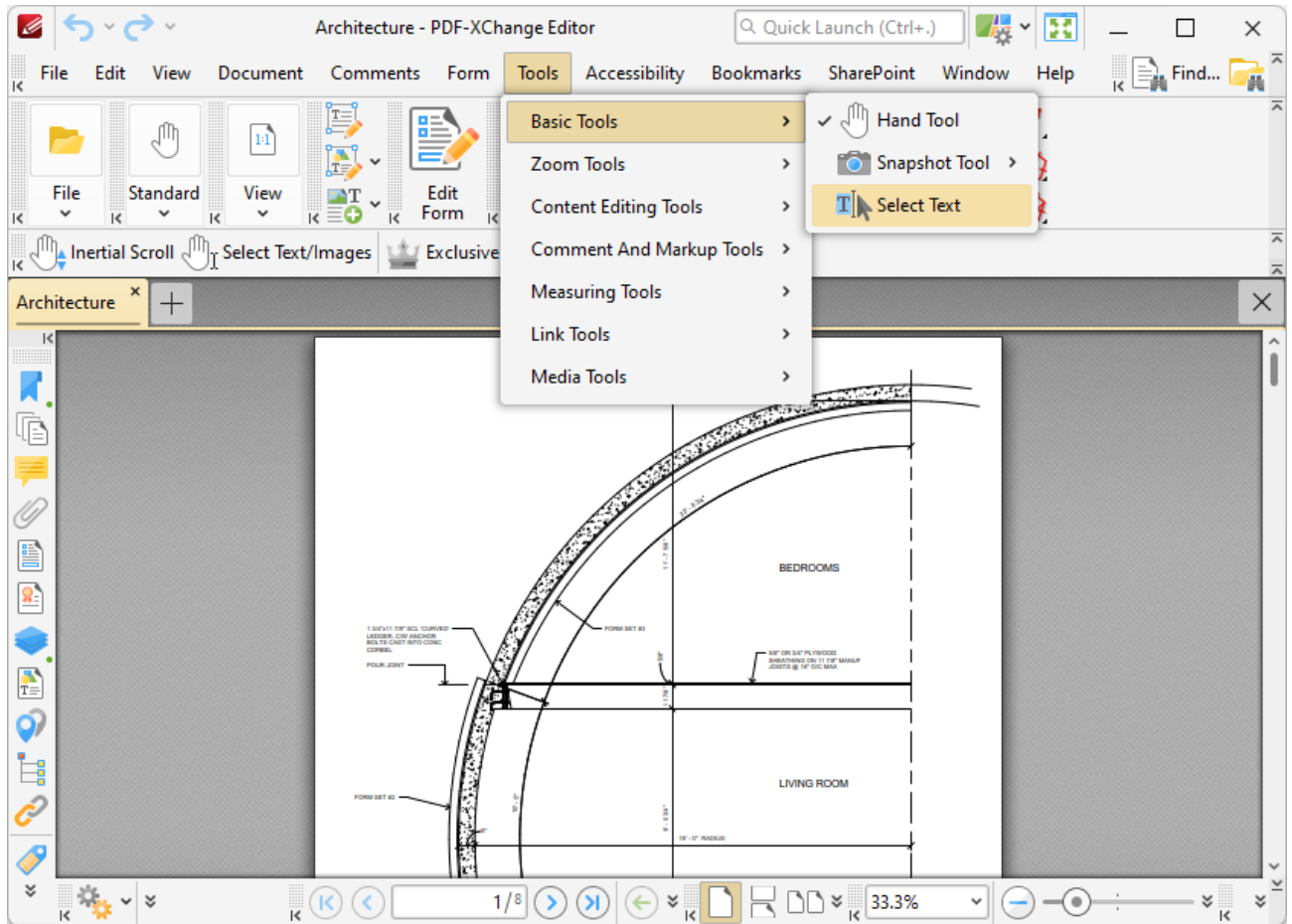
Figure 1. Basic Tools Submenu, Select Text Tool

The **Select Text Tool** is used to select base-content text. When it is enabled, click and drag the pointer to select text. Double-click to select words, triple-click to select paragraphs and quadruple-click to select all text on the current page. Right-click selections for editing options, as detailed **here.** [837] Note that the default setting of the **Select Text Tool** results in it selecting entire lines of text. If you instead want to select a custom area of text, such as text that is located over several lines at the center of a

larger block of surrounding text, simply press and hold the Alt key and then select the desired text. Additionally, please note that when text is copied from PDF documents and pasted into applications/locations outside of **PDF-XChange Editor** (such as **Microsoft Word**) additional page breaks may appear. This is a recognized issue with PDF documents. The **Edit Objects Tool** 823 should be used instead of the **Select Text Tool** in order to avoid this issue when copying text.

When this tool is in operation two options are available in the **Properties Toolbar:** 485

- **Exclusive Mode** simplifies the process of using the **Select Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to select text without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Select Text Tool.** Further information on tool properties is available **here.** 1292

Additionally, it should be noted that when text is copied from PDF documents and pasted in applications/locations outside of **PDF-XChange Editor** (such as **Microsoft Word**) additional page breaks may appear. This is a recognized issue with PDF documents. The **Edit Objects Tool** 823 should be used instead of the **Select Text Tool** in order to avoid this issue. When the **Edit Objects Tool** is enabled, select text and then press Ctrl+C to copy it.

5.7.2   Zoom Tools

Zoom Tools

Hover over **Zoom Tools** to open the following submenu:
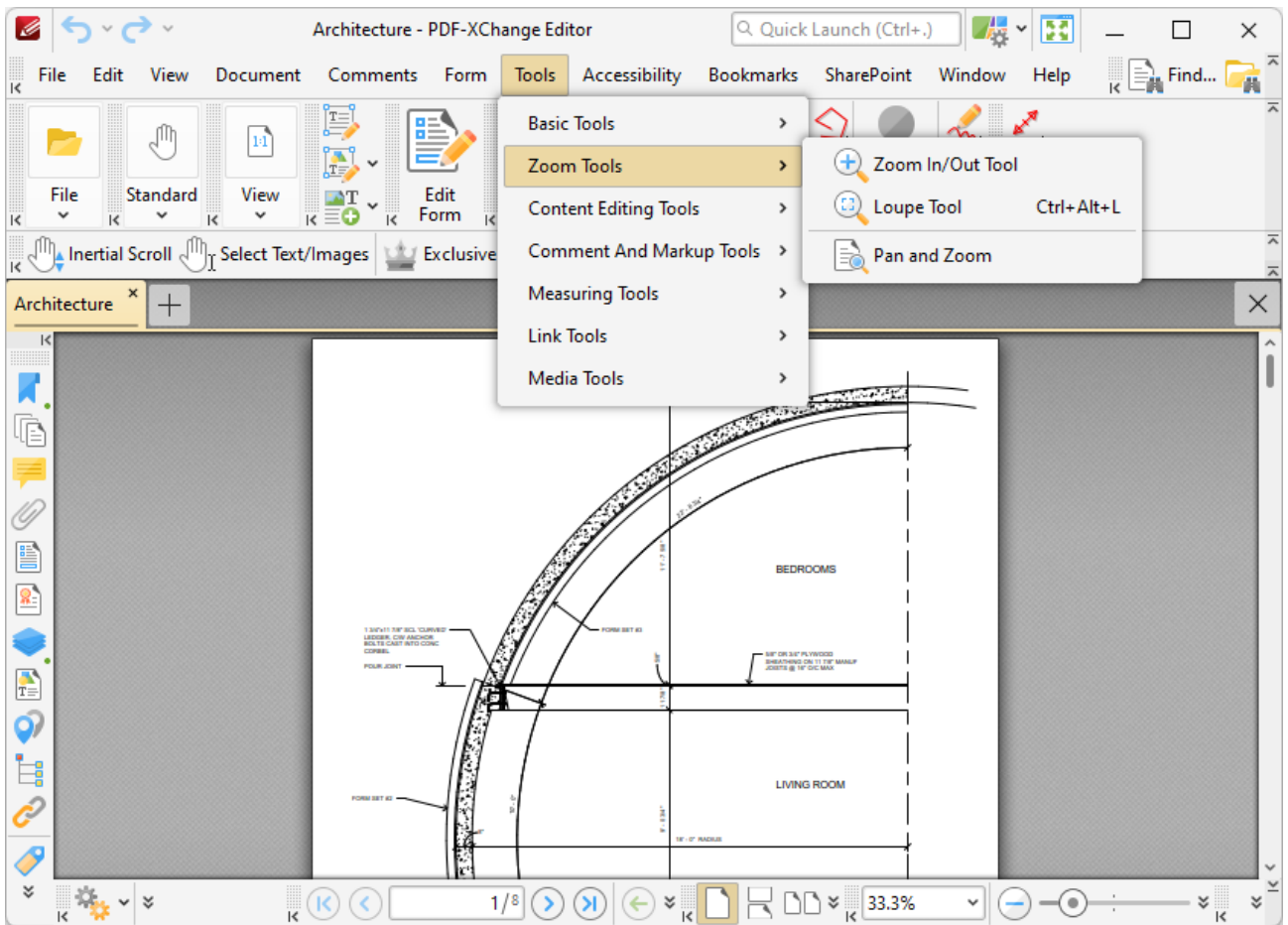
Figure 1. Tools Tab Submenu, Zoom Tools

These tools are zoom-related and assist in the viewing/editing of documents:

- The **Zoom In/Out Tool** 815 is used to zoom in on/out from documents.
- The **Loupe Tool** 817 utilizes the dynamic loupe window to display a magnified selection of the current document.

- The **Pan and Zoom** [820] feature utilizes the **Pan and Zoom** window, which displays a miniature of the current document page to assist in editing. Specifically, it enables the efficient manipulation of the page zoom and current view.

5.7.2.1   Zoom In/Out Tool

![PDF icon] **Zoom In/Out Tool**

Click **Zoom In/Out Tool** to enable this tool:
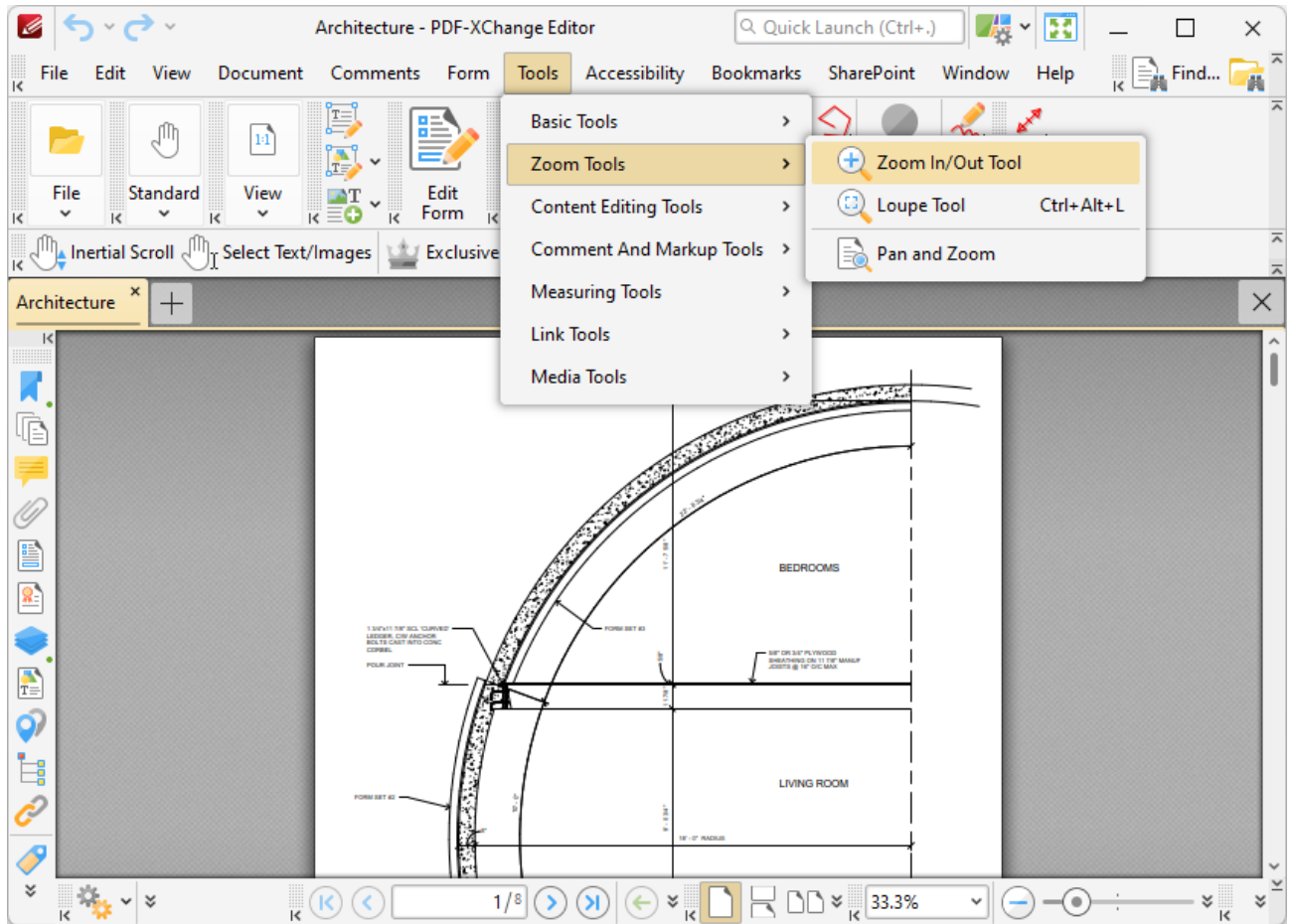
Figure 1. Tools Tab Submenu, Zoom In/Out Tool

The **Zoom In/Out Tool** is used to adjust the zoom level. When it is selected the pointer becomes a magnifying glass icon. Click to zoom to the location at which the icon is located. Hold Ctrl and click to zoom out. Alternatively, click and drag the pointer to determine an area. The **Zoom In/Out Tool** will move the current view to the area specified when the mouse button is released.

When this tool is in operation two options are available in the **Properties Toolbar:** 485

- **Exclusive Mode** simplifies the process of using the **Zoom In/Out Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to select areas without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Zoom In/Out Tool.** Further information on tool properties is available **here.** 1292

5.7.2.2   Loupe Tool

Loupe Tool

Click **Loupe Tool** to enable this tool:
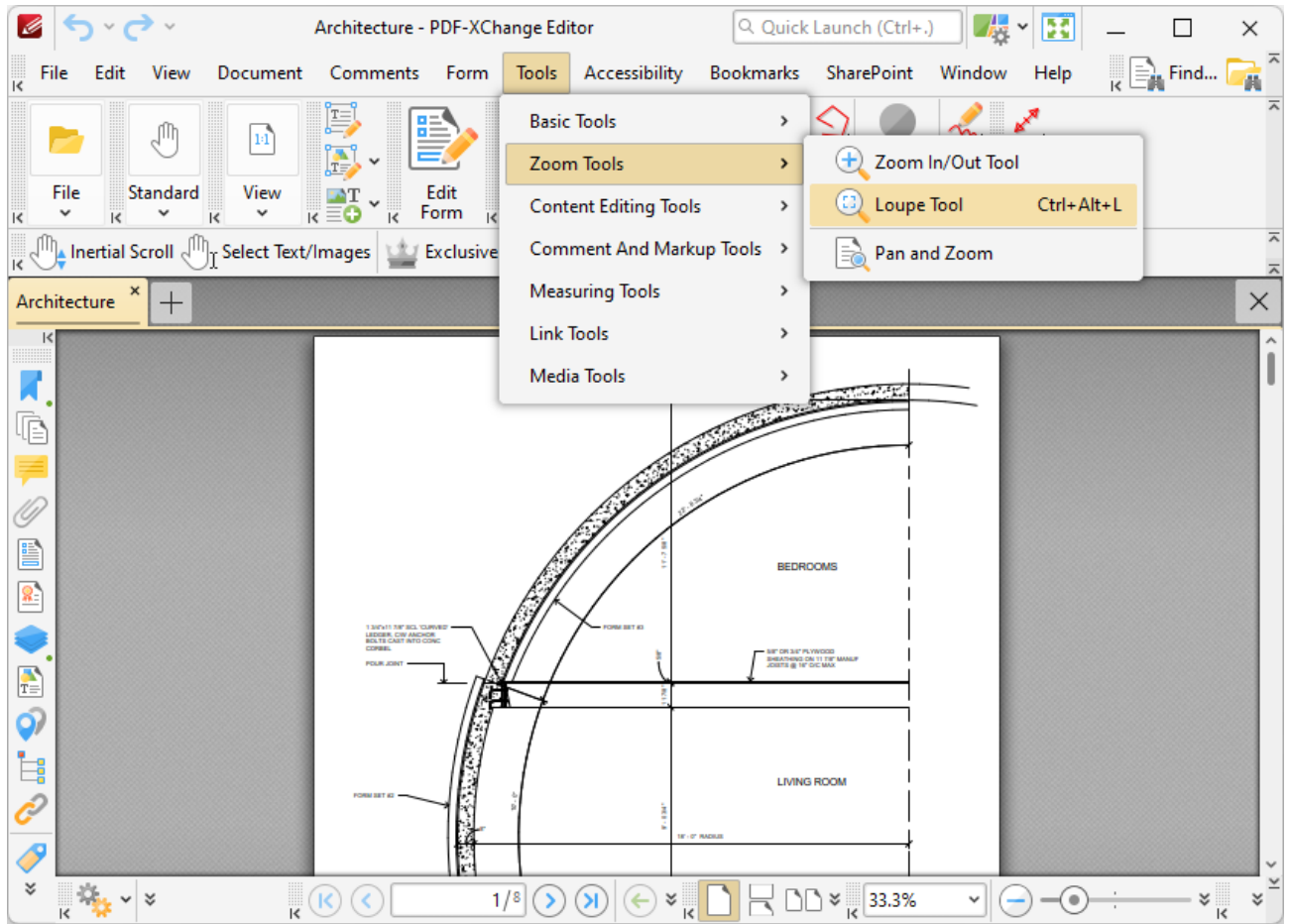
Figure 1. Tools Tab Submenu, Loupe Tool

The **Loupe Tool** is used to assist in the editing of PDF documents and to examine documents in closer detail. When the **Loupe Tool** is enabled, a customizable bounding box is displayed in the current document. The content of this box determines the content of the **Loupe** window:
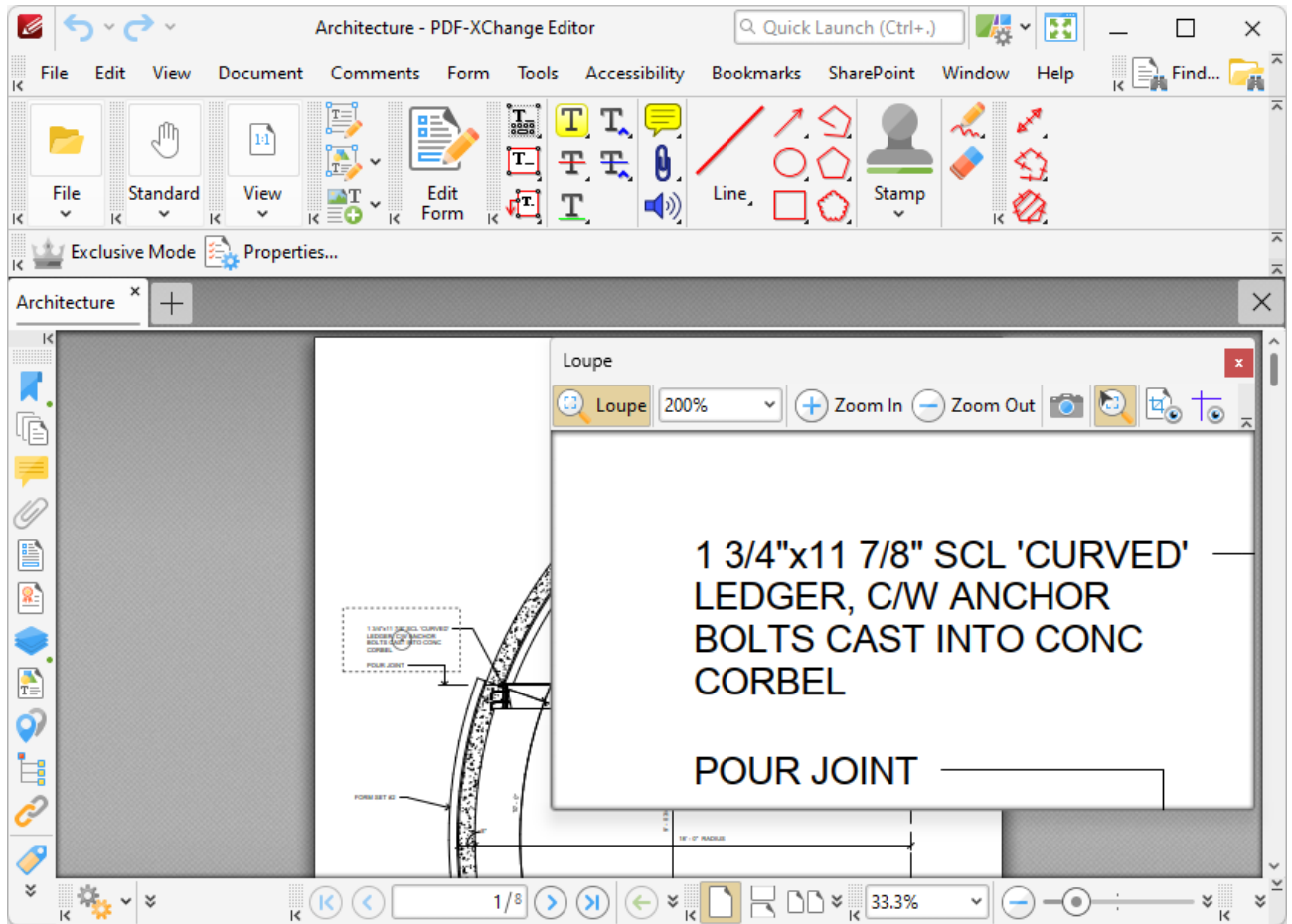
Figure 2. Active Loupe Tool

- Adjust the size of the **Loupe** window to determine the proportions of the **Loupe** box.
- Use the zoom number box in the **Loupe** window toolbar, or the plus and minus icons, to determine the level of zoom displayed in the window.
- Click the camera icon in the loupe window toolbar to take a snapshot of the current view. A bitmap copy of the selection will be pasted to the clipboard.
- Click the track mouse icon in the loupe window toolbar to enable/disable the **Track Mouse** feature. When this feature is enabled the **Loupe Tool** will follow the pointer. Disable this feature to adjust the size of the **Loupe** box as a standard content item.
- Click the **Show Page Boxes** icon to show/hide page boxes. Page boxes determine the content and appearance of PDF documents, especially with regards to printing. Further information on page boxes is available **here.** 1271
- Click and drag the loupe window to reposition it on the screen. When the mouse button is clicked, four icons will appear in the center of the borders of the main window. Move the pointer onto these icons and release the mouse button to dock the loupe window.

When the **Loupe Tool** is in use, there are two options are available in the **Properties Toolbar:** 485

- **Exclusive Mode** simplifies the process of using the **Loupe Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to select areas without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- **Properties** opens the **Properties** window to view/edit the properties for the **Loupe Tool.** Further information on tool properties is available **here.** 1292

5.7.2.3 **Pan and Zoom**

 Pan and Zoom

Click **Pan and Zoom** to enable the **Pan and Zoom** window:
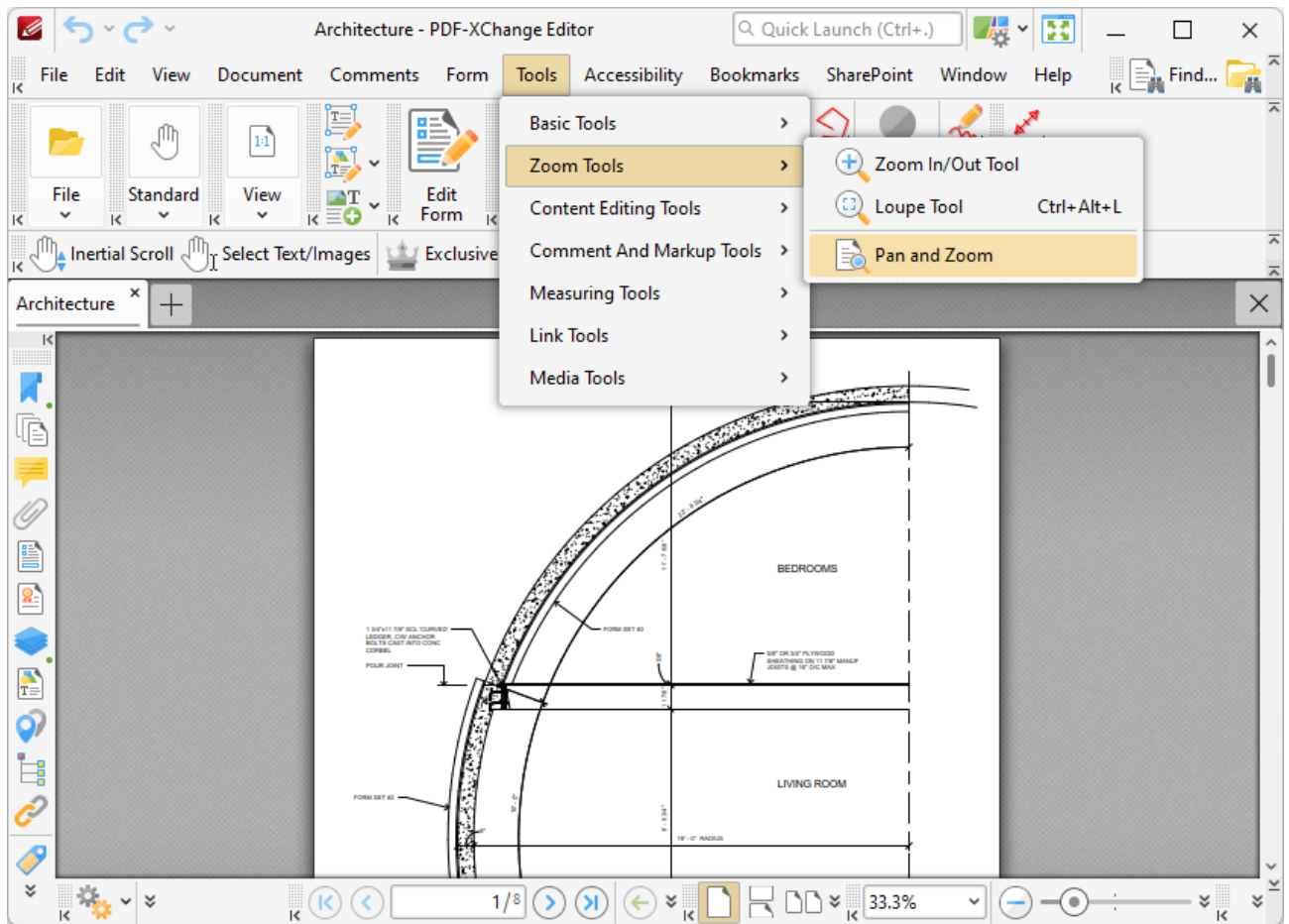
Figure 1. Tools Tab Submenu, Pan and Zoom

The **Pan and Zoom** window is used to navigate and zoom in on/out from documents:
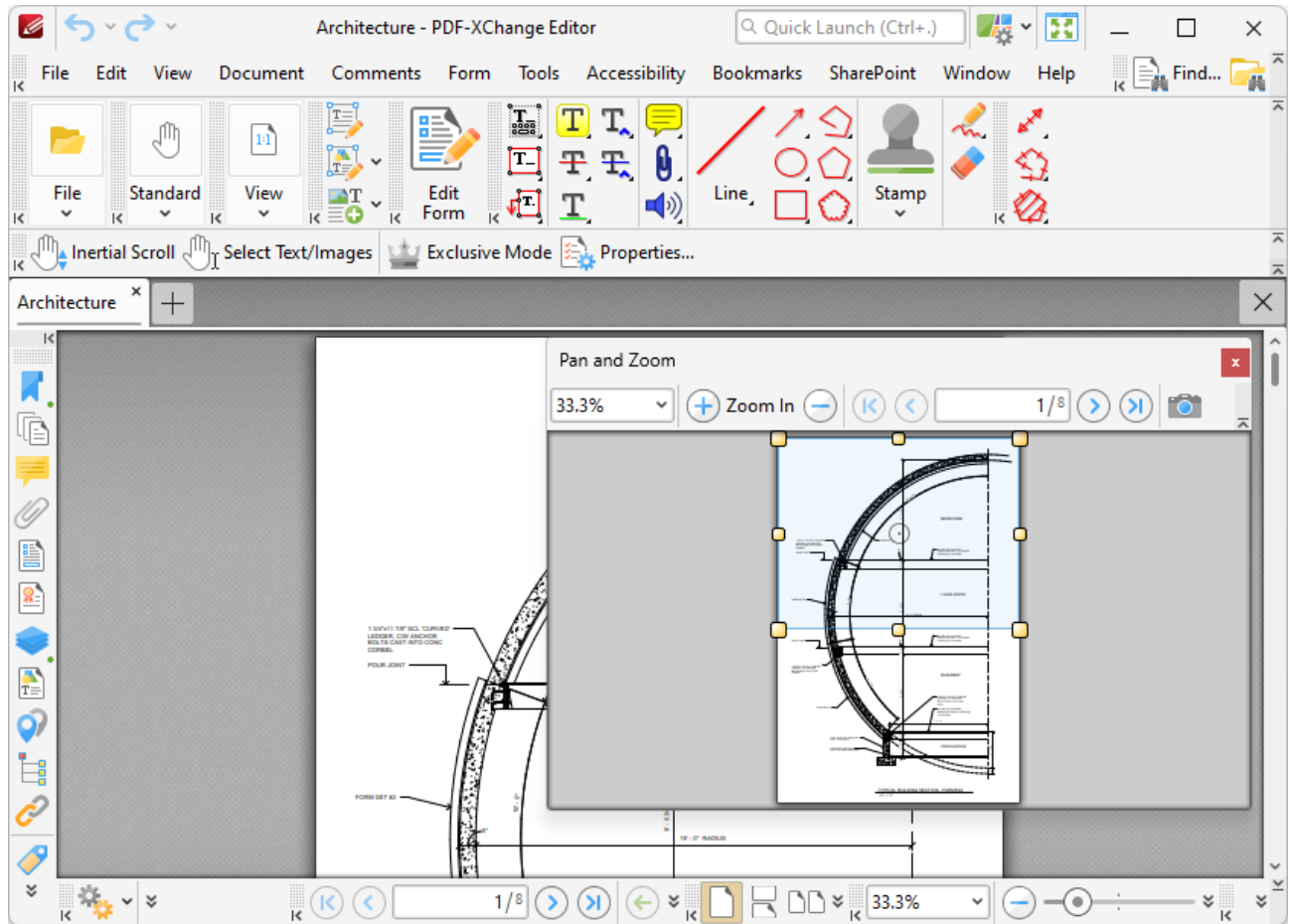
Figure 2. Pan and Zoom Window

- The blue rectangle determines the current view in the main window. Click and drag the rectangle to adjust the current view.
- Adjust the yellow control points to manipulate the pan and zoom. Alternatively, use the plus and minus icons in the toolbar to zoom incrementally, or enter a zoom level in the number box.
- Use the arrow icons in the **Pan and Zoom** toolbar to move between document pages.
- Click the camera icon in the **Pan and Zoom** toolbar to take a snapshot of the current view. A bitmap copy of the selection will be pasted to the clipboard, and can then be edited as detailed **here.** [305]
- Click and drag the loupe window to reposition it on the screen. When it is selected, four icons will appear in the center of the borders of the main window. Move the pointer onto these icons and release the mouse button to dock the **Pan and Zoom** window.

When the **Pan and Zoom** feature is in operation two options are available in the **Properties Toolbar:** [485]

- **Exclusive Mode** simplifies the process of using the **Pan and Zoom** feature. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base

content. This makes it possible to select areas without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the standard manner.

- **Properties** opens the **Properties** window to view/edit the properties for the **Pan and Zoom** feature. Further information on tool properties is available **here.** 1292

5.7.3   **Content Editing Tools**

 Content Editing Tools

Hover over **Content Editing Tools** to open the following submenu:
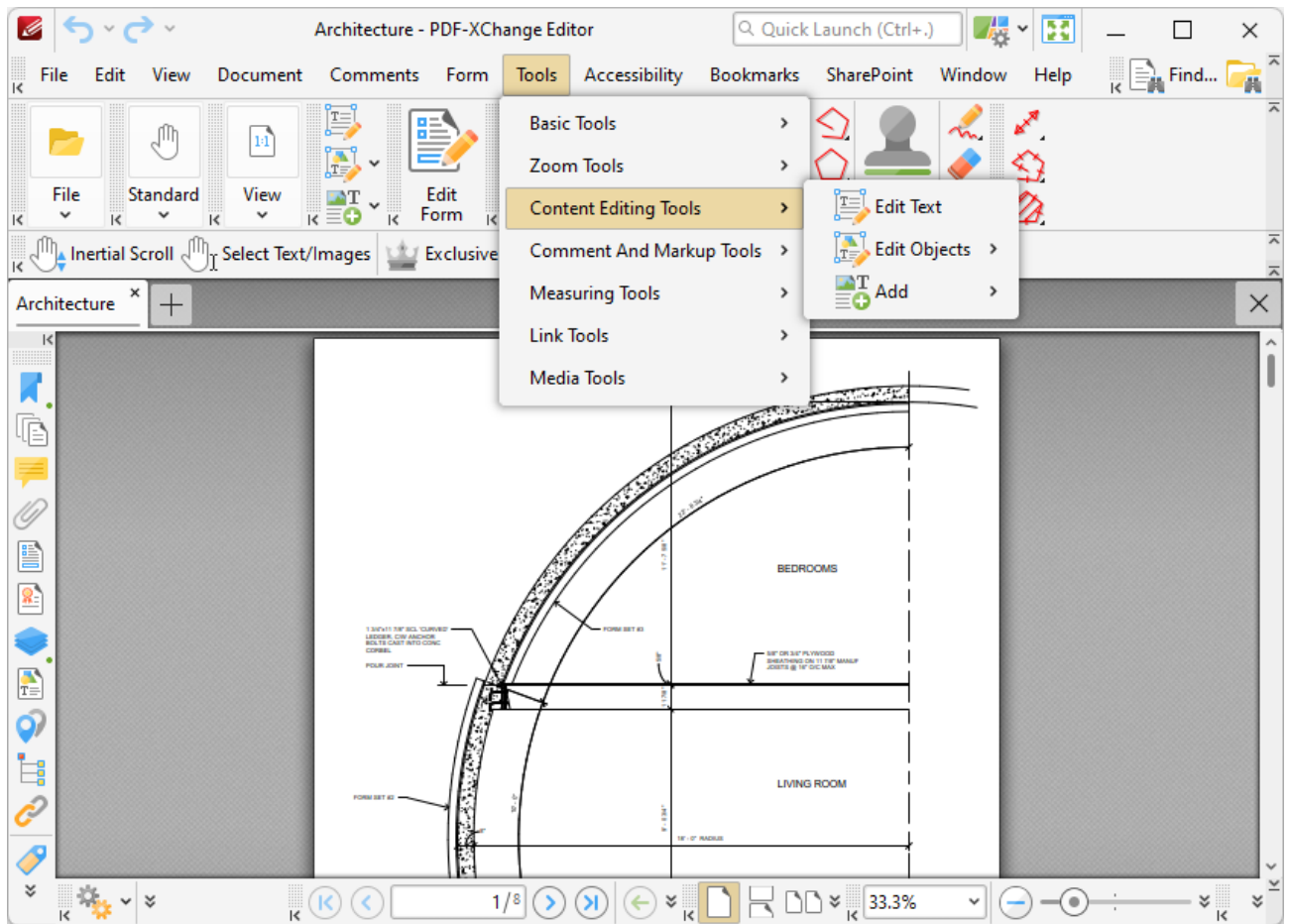
Figure 1. Tools Tab Submenu, Content Editing Tools

The content editing tools are used to edit the base content of documents and add text, images and barcodes to their base content layer. Please note that the **Content** 548 pane is a very useful feature to use in conjunction with the content editing tools. Shortcuts to the **Edit Objects** and **Add** submenus are available in the **Edit Content Toolbar:**

Figure 2. Edit Content Toolbar

▼ **Edit Objects Tool**

Hover over **Edit Objects** to open the **Edit Objects Tool** submenu:
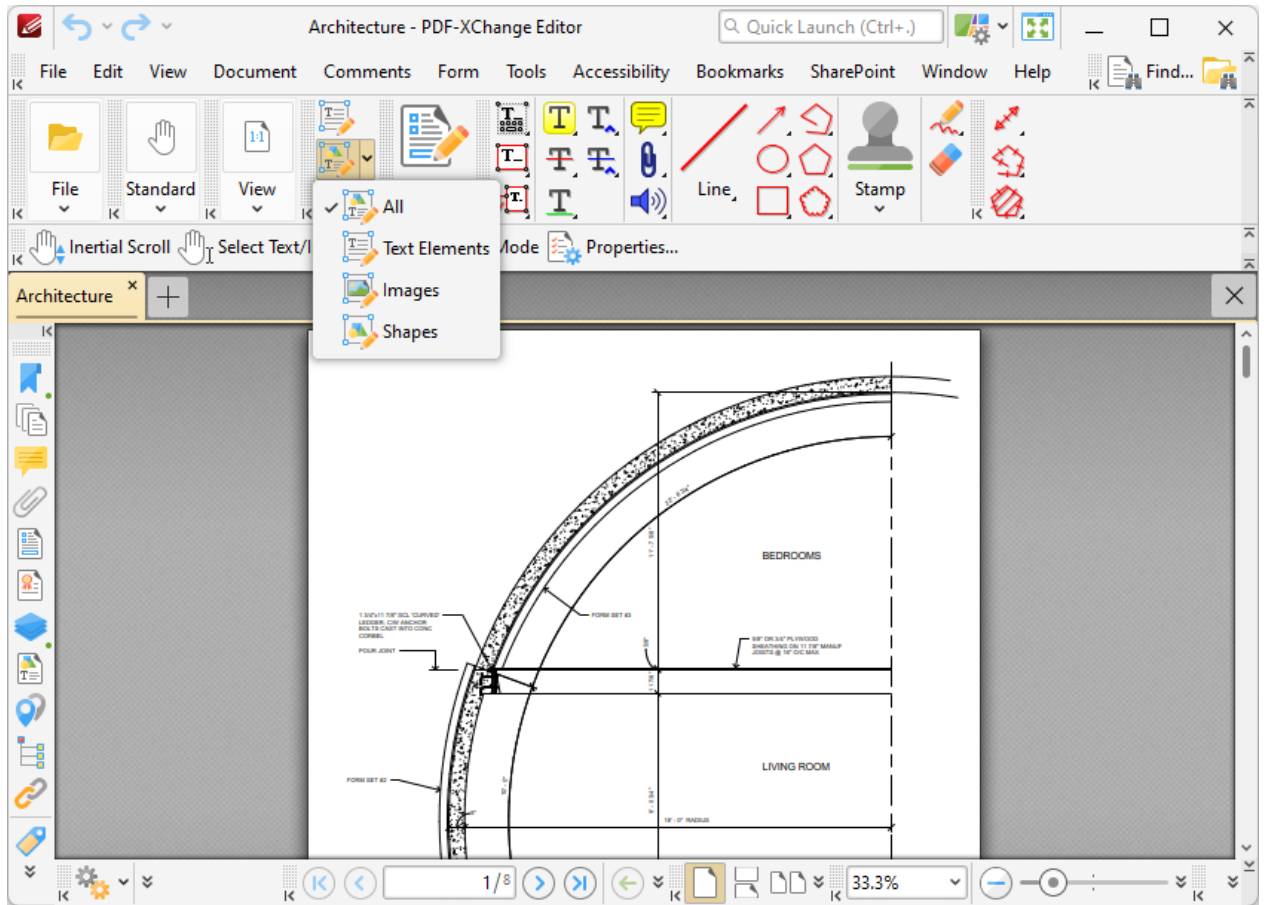
Figure 3. Tools Tab Submenu, Content Editing Tools, Edit Objects Options

The option selected in this submenu determines the document content that the **Edit Objects Tool** selects and edits:

- Select **All** to edit text, images and shapes simultaneously.
- Select **Text Elements** to edit only text.
- Select **Images** to edit only images.
- Select **Shapes** to edit only shapes. Shapes are defined as paths, shading, XForms and all other document base content that is neither text nor imaged-based.

When the **Edit Objects Tool** is selected, click to select content items, or click and drag to group-select content items. When items are group selected they are edited simultaneously. Selected content items appear as below:
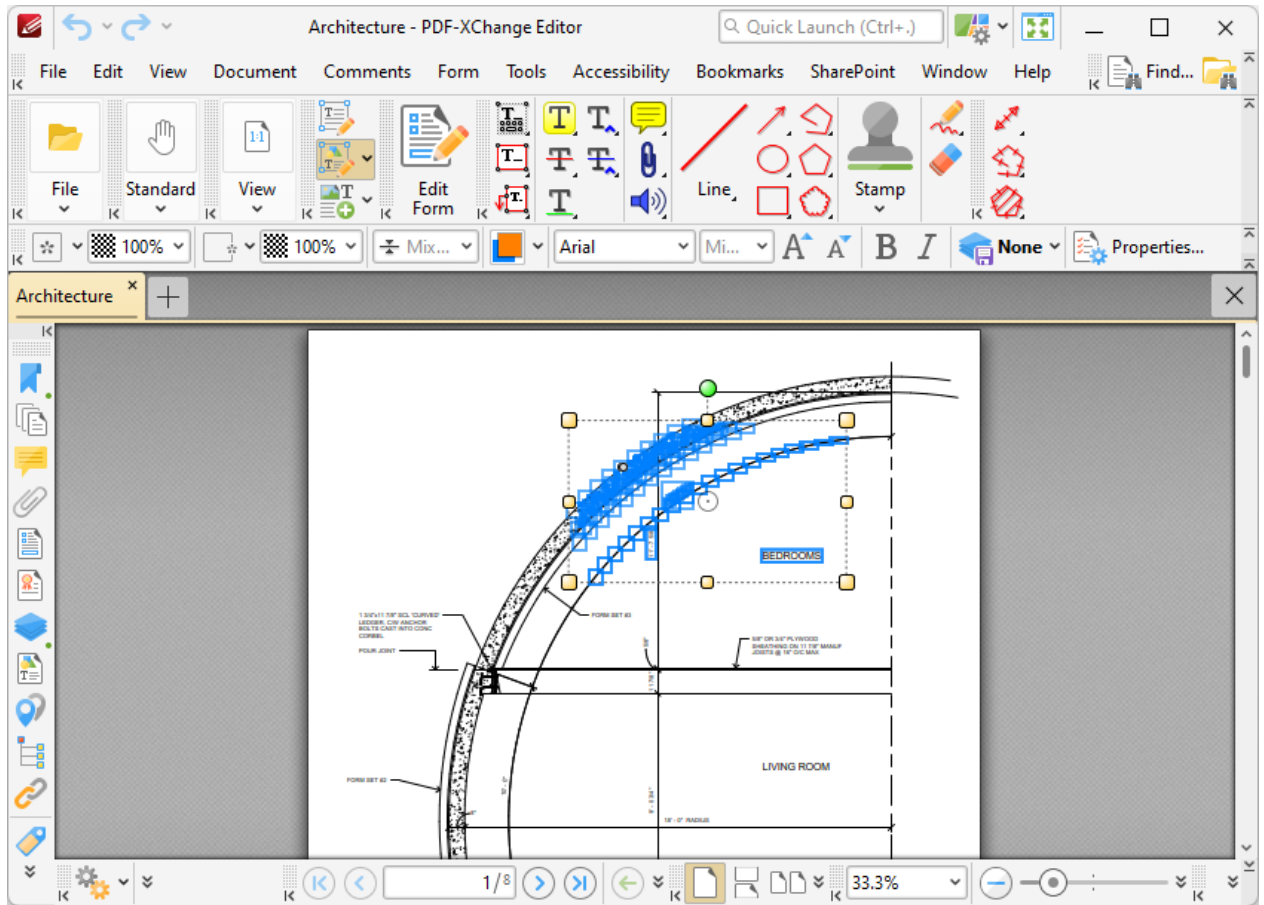
Figure 4. Selected Content Item

- Click and drag the yellow control points to resize content.
- Click and drag the circle at the center to reposition content.
- Click and drag the green control point at the top to rotate content items. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition content.
- Use the editing aids detailed **here** 610 to assist in the precise placement of document content.
- Click **Properties** in the **Properties Toolbar** 485 to open the **Properties** 213 pane and view/edit content item properties. Please note that not all properties are editable.
- Right-click content for further options. Please note that available options depend on the format of selected content. The menu below contains all available options:
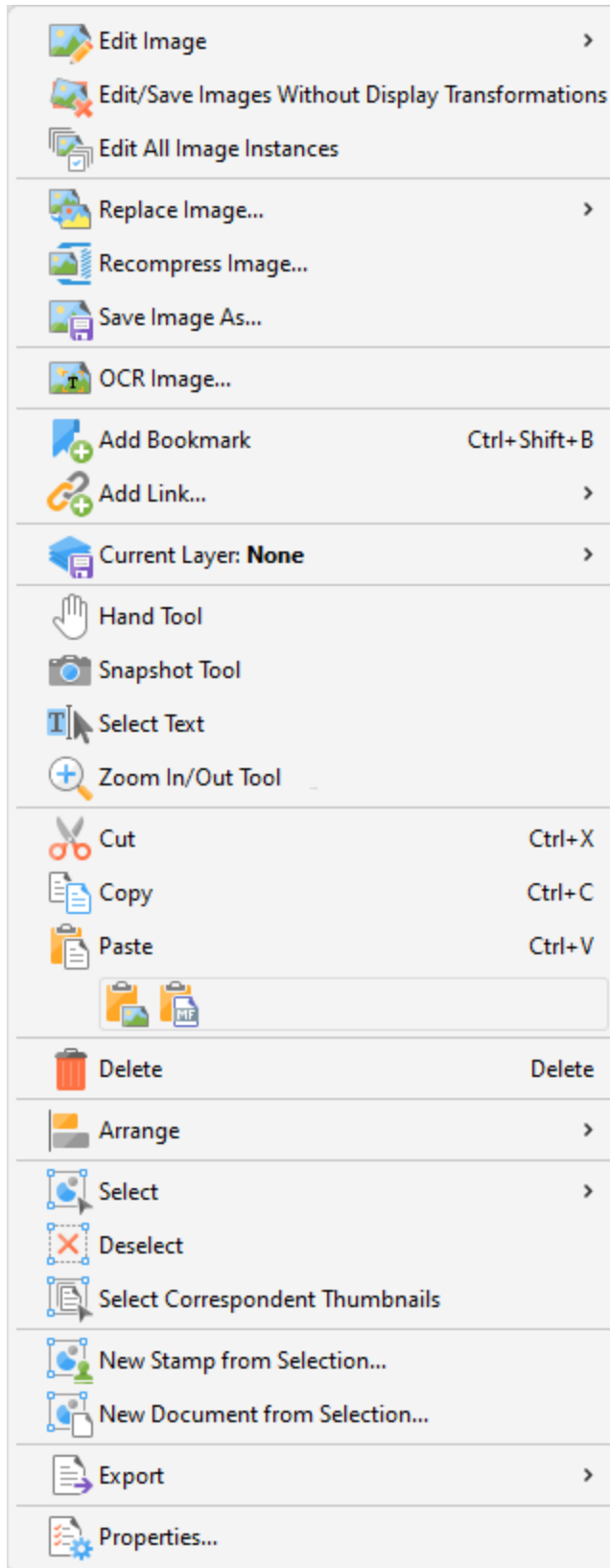
Figure 5. Content Items Right-Click Context Menu

- Hover over **Edit Image** to view editing options for images:
  - Click **Default Application** to edit the image in the default application for editing images. Note that changes made to images in the application will be updated in the current document when the image is saved.
  - Click **Open With** to select a non-default application with which to edit the image. The **Open with** dialog box will open. Selected the desired application and click **OK** to launch it.
- Click **Edit/Save Images Without Display Transformations** to enable/disable this feature. When it is enabled, images can be edited/saved in the state that they were in when added to the document. All subsequent rotations, transformations and scaling operations applied to the image/page are ignored.
- Click **Edit All Image Instances** to edit all instances of images simultaneously in documents. When this option is enabled and an image is edited, all identical images in the document will be edited in the same manner.
- Click **Replace Image** to replace selected images with an image from file. Note that replacement images are automatically scaled to match the dimensions of images that they replace.
- Click **Recompress Image** to recompress images, as detailed below.
- Click **Save Image As** to save a copy of selected images to file. The **Save File As** dialog box will open. Enter a file name in the **File name** text box, then click **Save** to save the image.
- Click **OCR Image** to perform optical character recognition on selected images. The **OCR Image** dialog box will open. Select the desired language and accuracy then click **OK** to perform OCR.
- Click **Add Bookmark** to add a bookmark at the selected location. Further information on bookmarks is available **here.** [504]
- Hover over **Add Link** to view the options for adding links:
  - Click **Add Goto Link** to create a link from the selected location to a location within the current document. The **Browse for Link Target** dialog box will open. Move to and select the desired document location and then click **Set Link** to create the link.
  - Click **Add Weblink** to create a link from the selected location to an internet location. The **Add Action: "Open a Web Link"** dialog box will open. Enter the desired **URL** in the text box and then click **OK** to create the link.
  - Click **Add Open File Link** to create a link from the selected location to a file on the local computer. The **Add Action: "Open a File"** dialog box will open. Determine options as detailed **here** [1002] then click **OK** to create the link.
  - Click **Add Custom Link** to create a custom link. Custom links can be used to create a range of dynamic links, such as links that launch JavaScript actions, move to pages in other documents, open files, execute **PDF-XChange Editor** commands, reset/submit forms, play sounds and show/hide form fields. The **Edit Action List** dialog box will open. Determine options as detailed **here** [991] then click **OK** to create the link.

- **Current Layer** displays the current layer to which selected content belongs. Hover over this option to view a list of all layers in the document. Click a layer to move the selected content there, or click **New Layer** to move the selected content to a new layer. Further information about layers and layer creation is available **here.** 535
- Click **Hand Tool, Snapshot Tool, Select Text** or **Zoom In/Out Tool** to enable these tools.
- Click **Cut, Copy, Paste** or **Delete** to perform these actions on selected content. If you have selected text then additional options are available:
  - Click **Paste as plain text** to paste text as plain text.
  - Click **Paste as Rich Text** to paste text as rich text.
- Hover over **Arrange** to view arranging options for selected content:
  - Use the **Align** options to align selected content items.
  - Use the **Distribute** options to distribute selected content items evenly on the horizontal or vertical axis as desired.
  - Click **Make Same Width/Height/Size** to make selected content items the same width/height/size as desired.
  - Use the **Rotate/Flip** options to rotate/flip selected content.
  - Click **Transform** to edit the position, size and/or rotation of selected content, as detailed **here.** 205
  - Click **Duplicate** to to duplicate selected content items, as detailed **here.** 207
  - Click **Bring Forward** to bring content items forward one step in cases of multiple items overlapping.
  - Click **Send Backward** to send content items back one step in cases of multiple items overlapping.
  - Click **Bring to Front** to bring content items to the front in cases of multiple items overlapping.
  - Click **Send to Back** to send content items to the back in cases of multiple items overlapping.
- Hover over **Select** to view options for selecting all content of a specific format in documents:
  - Click **All** to select all content items in the document.
  - Click **Text** to select all text in the document.
  - Click **Images** to select all images in the document.
  - Click **Shapes** to select all shapes in the document.
  - Click **XForms** to select all XForms in the document.
- Click **Deselect** to deselect selected content.
- Click **Select Correspondent Thumbnails** to select the thumbnails of currently selected content. The corresponding thumbnails will then be selected in the **Thumbnails** 510 pane.
- Click **New Stamp from Selection** to create a new stamp from selected content, as detailed **here.** 946
- Click **New Document from Selection** to create a new document from selected content. The new document will open in a new window in **PDF-XChange Editor.**

- Hover over **Export** to view export options for selected content, then click **Export to Images** or **Export Selection to Microsoft Word Document/Excel/Powerpoint Presentation** as desired. If you are exporting to image format then you can customize options as detailed **here.** 168 If you are exporting to **MS Office** format then the **Save File** dialog box will open. Enter a name/location for the new file and then click **Save** to export the content.
- Click **Properties** to open the **Page Content Properties** pane for selected content. This pane is used to view/edit content properties, as detailed **here.** 549

Editing Shapes/Paths/Objects

Double-click shapes, or right-click shapes and and select **Edit Object** in the shortcut menu, to open the **Edit Path** toolbar in order to edit paths:
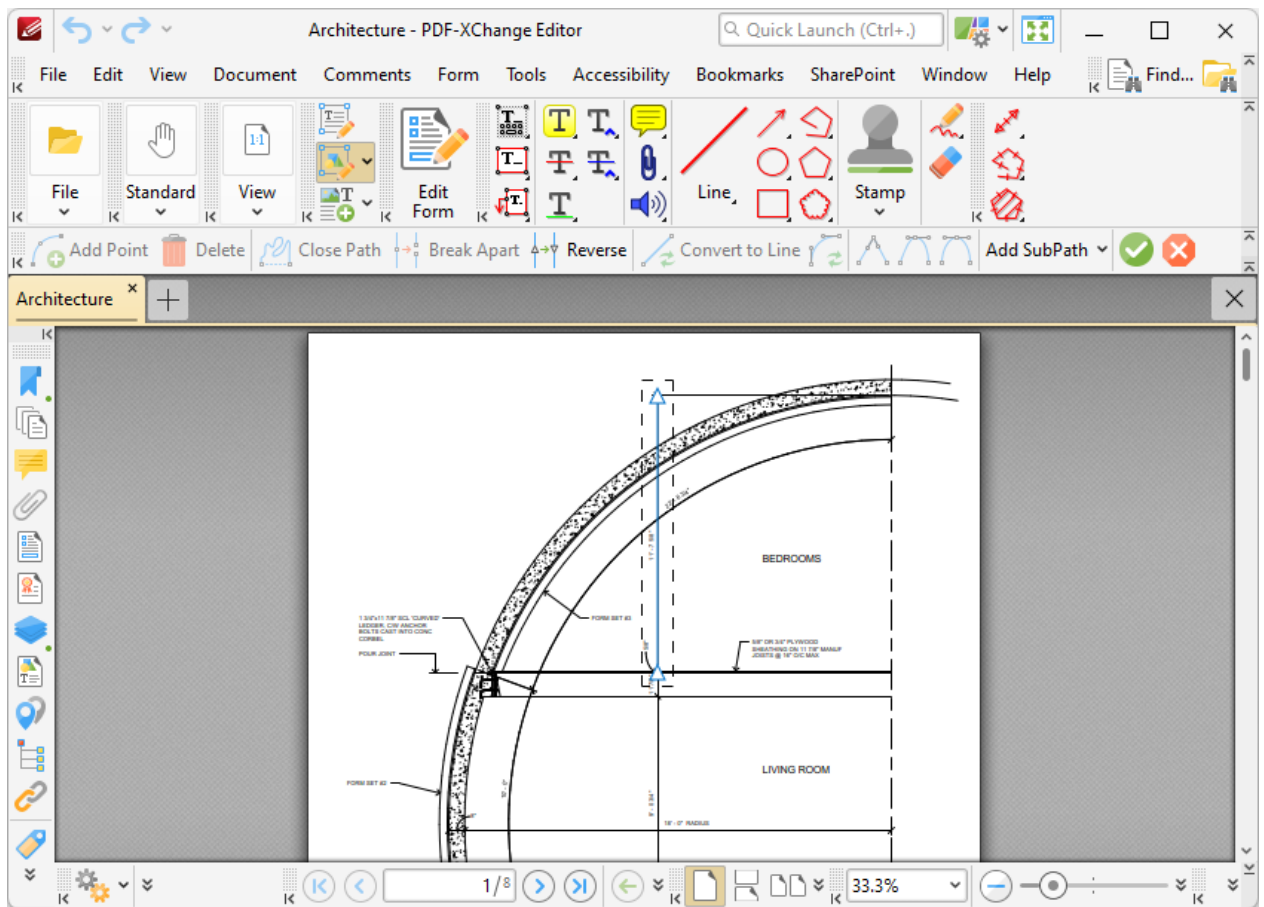
Figure 6. Edit Path Toolbar

You can use the options in this tab to edit paths as follows:

- Click the **Add SubPath** dropdown menu to add a subpath to selected paths:

- Click **Line, Corner Rectangle, 3-Point Rectangle, Parallelogram, Circle, Perimeter Circle, Centerpoint Arc, 3-Point Arc** or **Ellipse** to expand the selected path with the shape indicated, then click and drag to create the shape.
- Click **Add Polyline** to expand the selected path with a polyline, then click within the document to determine the shape of the polyline.
- Click **Add Bezier** to expand the selected path with a bezier curve, then click within the document to determine the shape of the curve.
- Click **Add Free Paint** to expand the selected path in freehand, then click and drag within the document to determine the created shape.

You can use the options in the **Edit Path** toolbar when you have selected a line within a path:

- Click **Add Point** to add a point to the line.
- Click **Delete** to delete the line.
- Click **Close Path** to complete the shape of paths that have open ends.
- Click **Break Apart** to break apart lines at points.
- Click **Reverse** to reverse sub-paths.
- Click **Convert to Line** to convert bezier curves to lines.
- Click **Convert to Bezier** to convert lines to bezier curves.
- Click **Corner** to specify the use of a corner for selected bezier handles.
- Click **Straight** to specify the use of a straight edge for selected bezier handles.
- Click **Smooth** to specify the use of a smooth edge for selected bezier handles.

Click **Finish Editing** to complete the current editing operation, or click **Cancel Editing** to cancel it.

Recompress Images
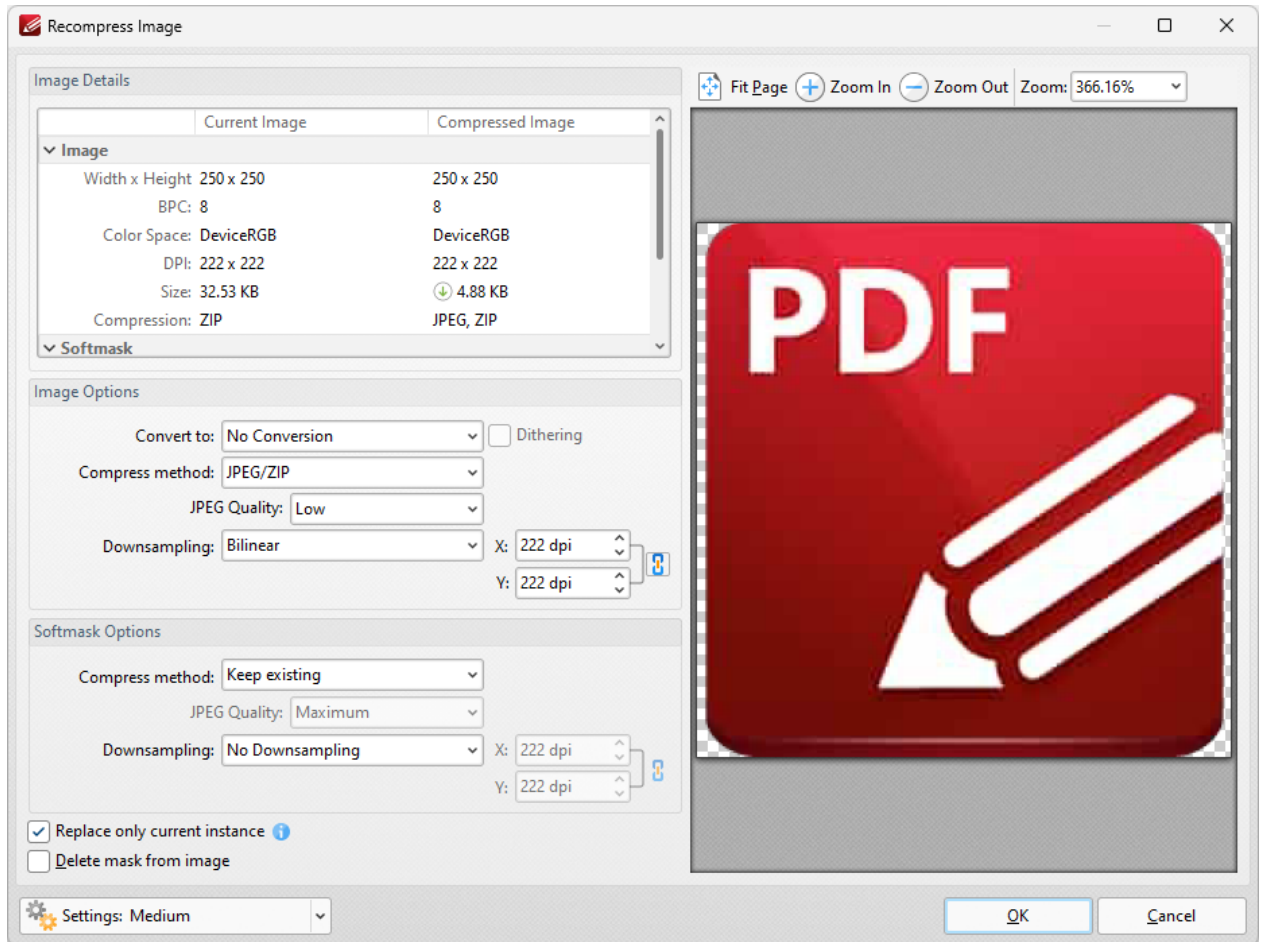
Figure 7. Recompress Image Dialog Box

These options are used to recompress document images. Use the **Image** options to determine conversion options:

- Use the **Convert to** dropdown menu to determine the format into which the image is compressed.
- Use the **Compress method** dropdown menu to determine the compression method.
- Use the **JPEG Quality** dropdown menu to determine the compression quality.
- Use the **Downsampling** method to determine the downsampling method used, and the adjacent number boxes to determine the downsampled resolution on the **X** and **Y** axes respectively.
- Select the **Replace current instance only** box to replace only the current instance of the image in documents where the same image is used multiple times.

Note that the values in the **Image Details** pane display details about the current image and the image after compression has taken place using the values entered in the **Recompress Image** dialog box. Additionally, the preview pane will update according to any changes made.

If you have multiple images selected and then click **Recompress Images,** then the following dialog box will open:
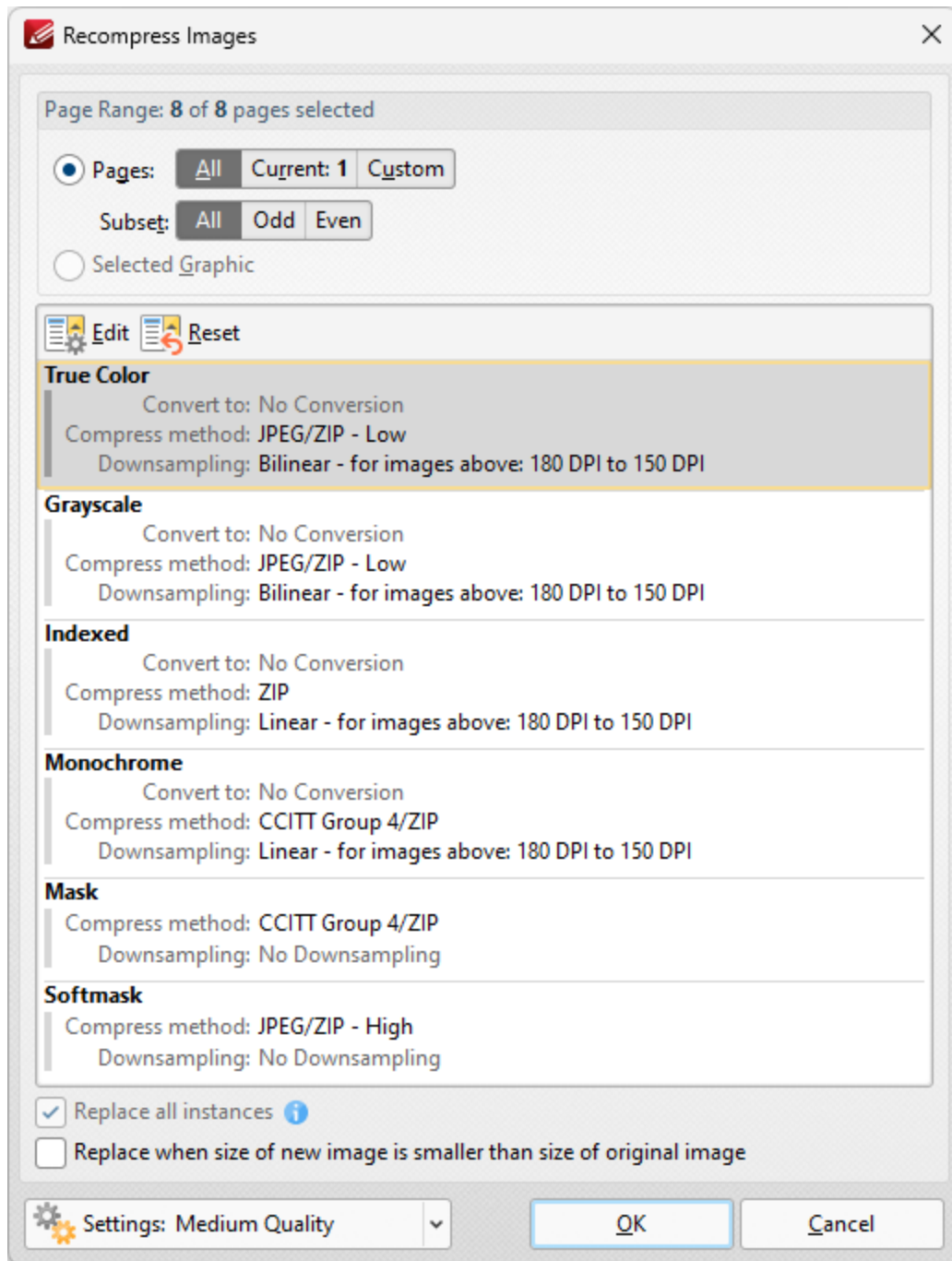
Figure 8. Recompress Images Dialog Box

- Use the **Page Range** options to determine the page range of images to be recompressed:
  - Select **All** to specify all pages.
  - Select **Current** to specify only the current page.

- Select **Custom** to specify a custom page range, then enter the desired page range in the adjacent number box. Further information about how to specify custom page ranges is available **here.** 1274
- Use the **Subset** options to specify a subset of selected pages. Select **All, Odd** or **Even** as desired.
- Alternatively, select the **Selected Graphic** button to recompress only the graphic currently selected in the document.

- Select a recompression option in the pane to determine the type of image recompression for the operation. Note that you can click **Edit** or **Reset** to edit/reset recompression settings.
- Select the **Replace all instances** box to replace all instances of the graphic that is being recompressed in cases where the graphic appears multiple times in the same document.
- Select the **Replace when size of new image is smaller than size of original image** box to replace recompressed images when they are smaller than the source image used to create them.
- Use the **Settings** dropdown menu to determine the quality of the recompression. Note that increasing quality will increase the file size and vice versa.

Click **OK** to recompress images.

▼ **Add Text/Images/Barcodes to Documents**

Hover over **Add** to open the following submenu:
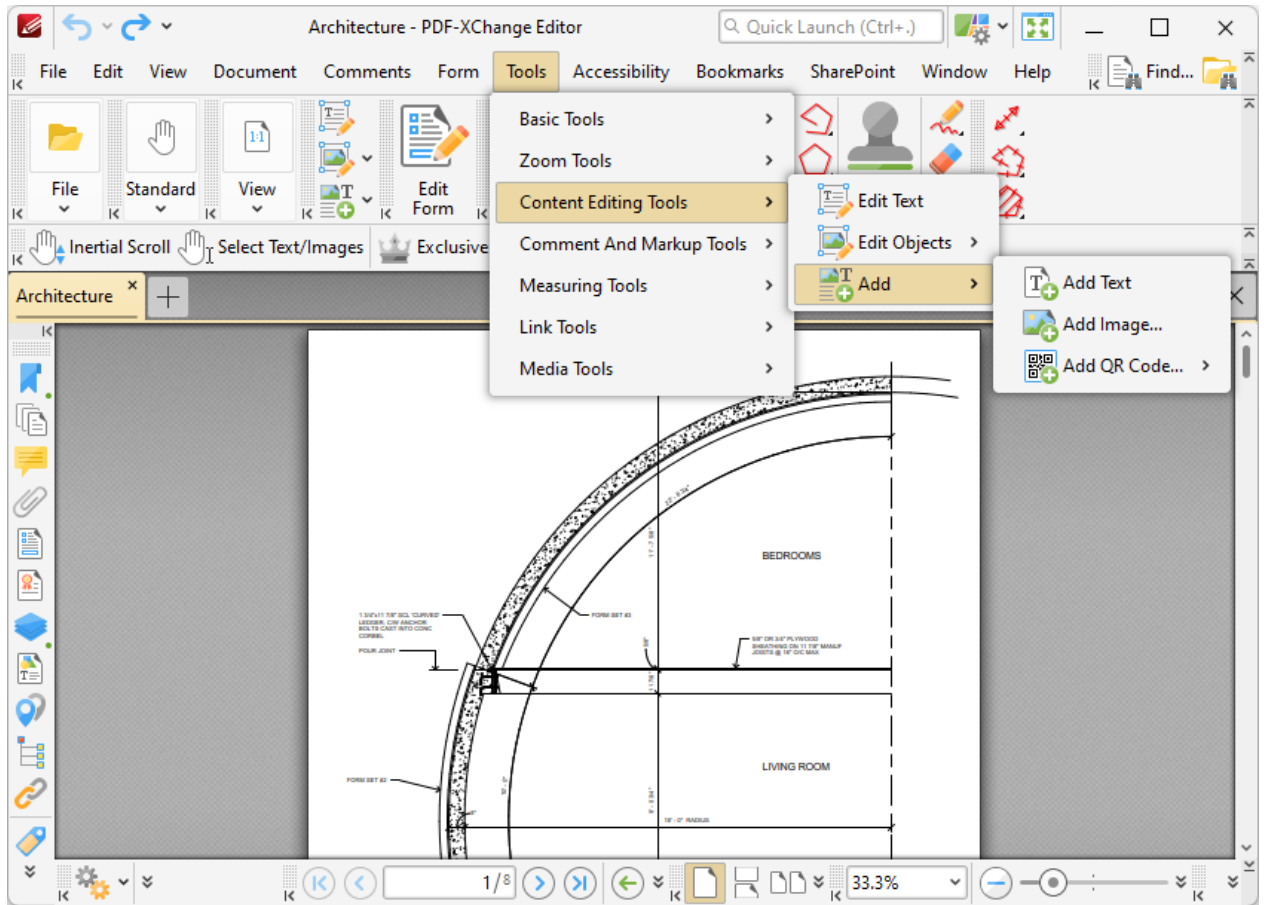
Figure 9. Tools Tab Submenu, Content Editing Tools, Add Options

These options are used to add text, images and barcodes to the base-content layer of documents:

▼ **Add Text**

Click **Add Text** to add text to documents:
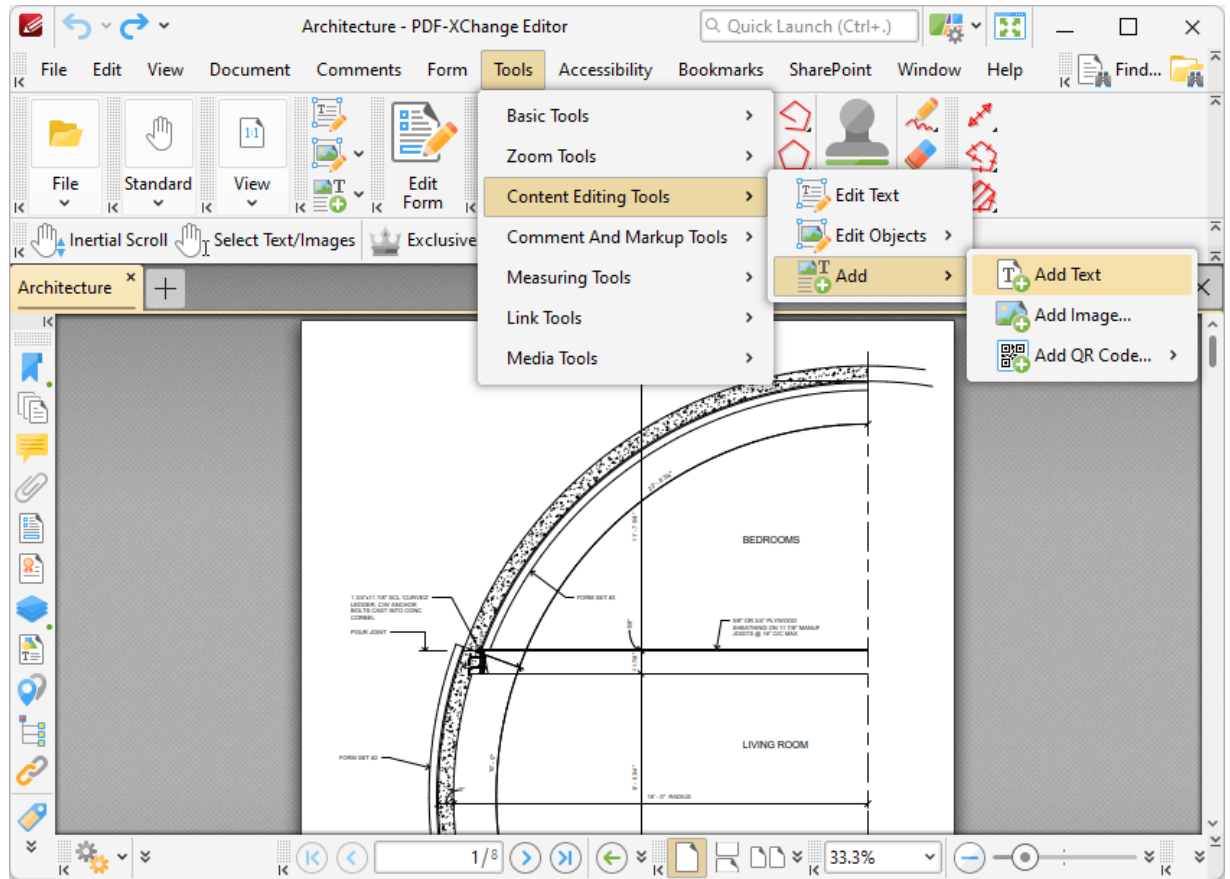
Figure 10. Tools Tab Submenu, Add Text Tool

When this tool is selected the pointer will become a cross icon. Move the icon to the desired location and click to designate the location of the new text box. Text can then be entered as desired:
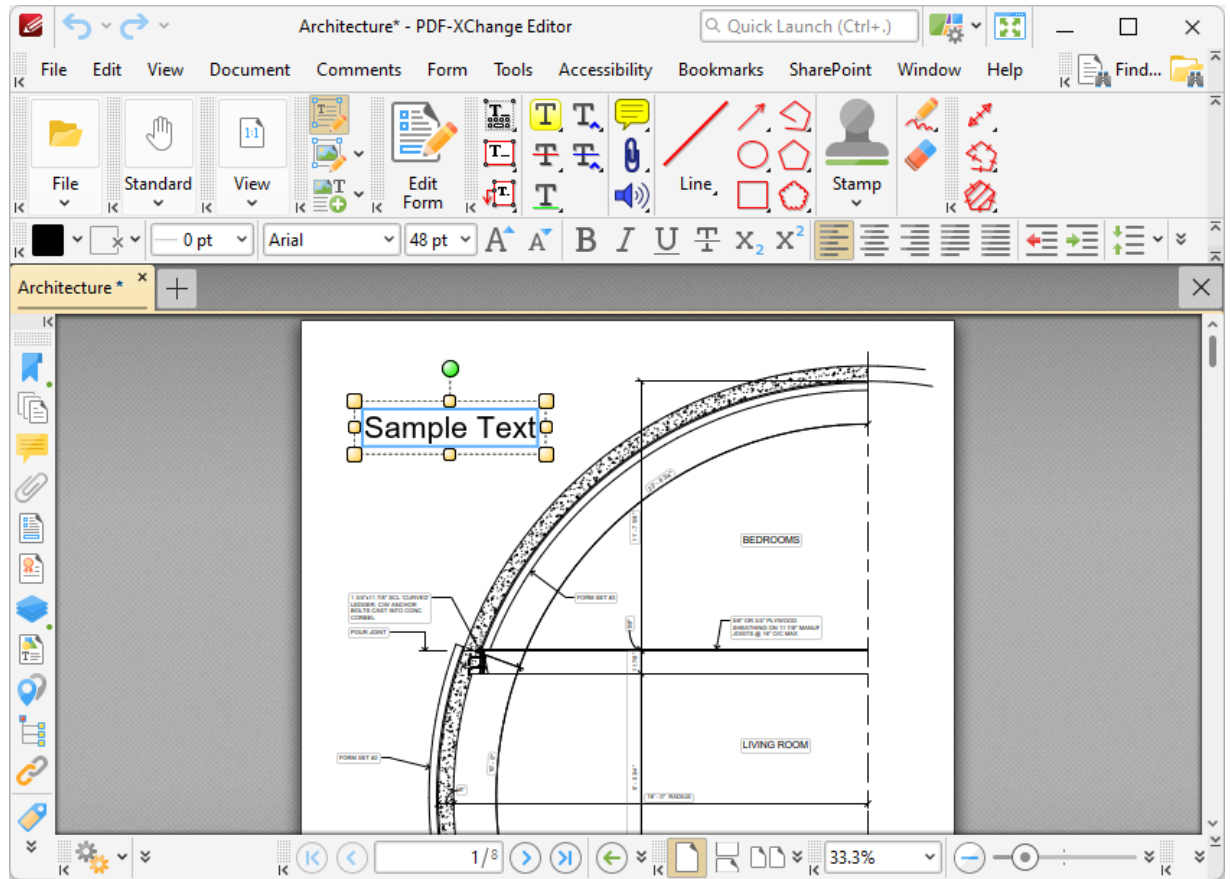
Figure 11. Add Text Tool Example

- Click and drag the central yellow control points on either side of text boxes to resize them horizontally. (It is not possible to resize text boxes vertically until text has been entered into them).
- Click and drag the green control point to rotate text boxes. Hold down Shift to rotate at increments of fifteen degrees.
- Use the editing aids detailed **here** 610 to assist in the precise placement of text boxes.
- Enter the desired text in the text box. Press **Enter** to start new lines. The options in the **Properties Toolbar** 485 can be used to adjust the text style. Further editing options are detailed **here.** 1288
- Note that to select text in completed text boxes it is necessary to click to select the text box and then click again to select the text.
- Press **Insert** to enable/disable the 'overtype' feature, which enters text over existing text.
- Right-click text for further options:
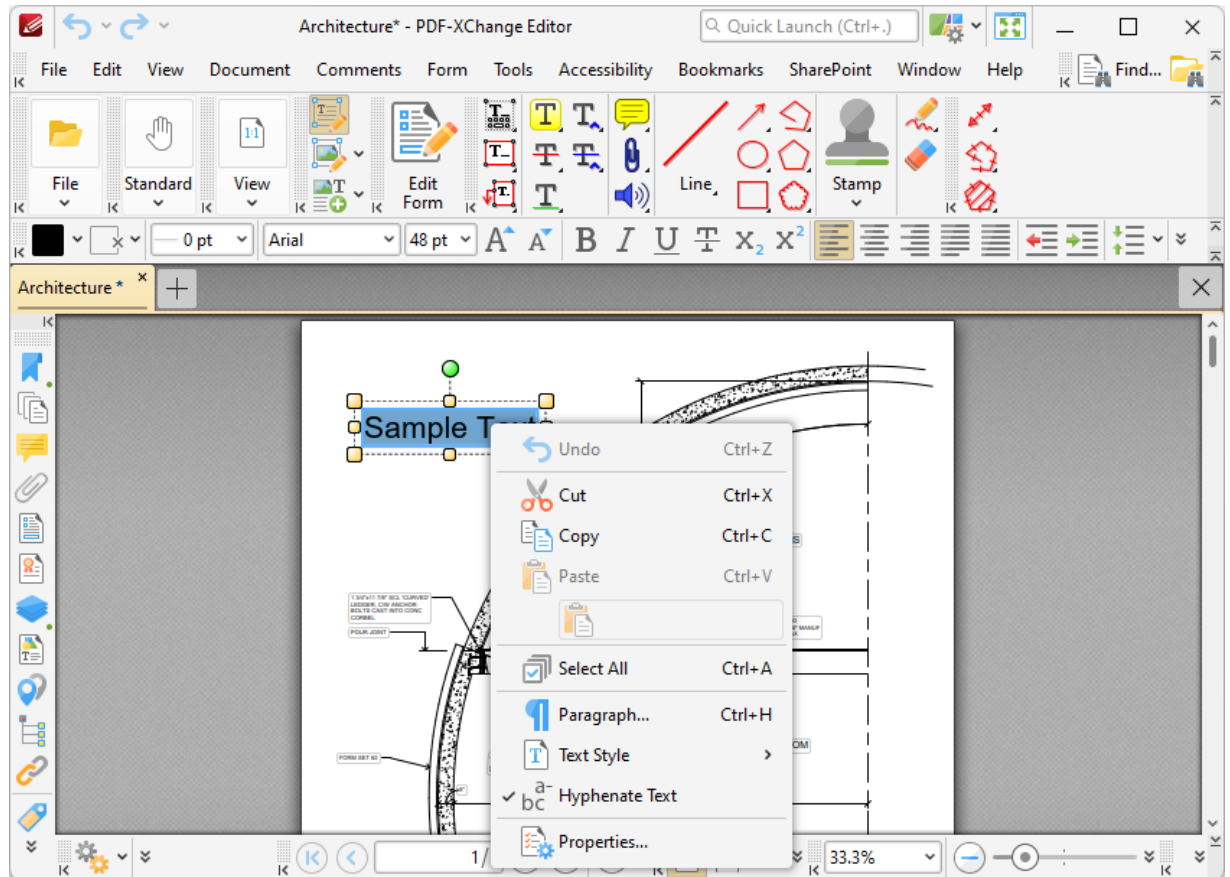
Figure 12. Editing Options

- Click **Undo** to reverse the most recent action.
- Click **Cut** to cut selected text to the clipboard.
- Click **Copy** to copy selected text to the clipboard.
- Click **Paste** to paste current clipboard text at the selected location.
- Click **Paste as Plain Text** to paste current clipboard text as plain text at the selected location.
- Click **Select All** to select all text in the selected area.
- Click **Paragraph** to edit paragraph settings, as detailed in *(figure 13)*.
- Click **Text Style** to update the style of selected text. The following options are available:
  - **Bold**
  - **Italic**
  - **Underline**
  - **Superscript** transforms selected text into superscript, which is used for specific purposes such as detailing chemical compounds.
  - **Subscript** transforms selected text into subscript, which is used for specific purposes such as detailing mathematical formulae.
  - **Clear Text Formatting** clears formatting from selected text.
  - **Make Current Text format Default** sets the format of selected text as the default format for subsequent text.

- **Apply Default Text Format** applies the default text format to selected text.
- Select **Hyphenate Text** to hyphenate text automatically when it crosses line endings.
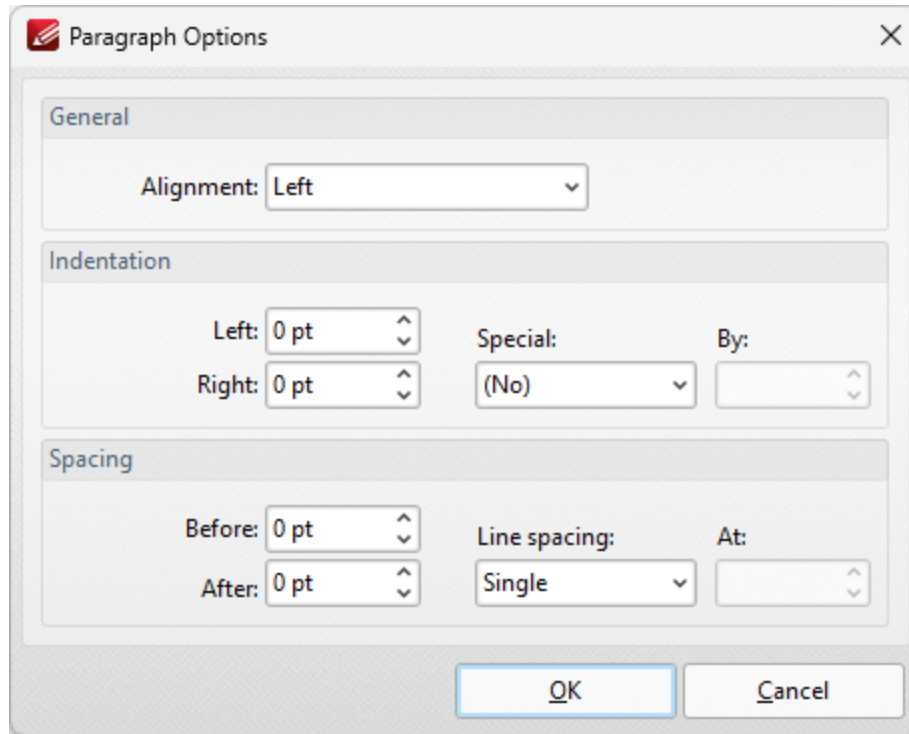
Figure 13. Paragraph Options

- Use the **Alignment** menu to determine the alignment of paragraphs.
- Use the **Indentation** number boxes to determine the indentation from the left and right margins, and the **Special** and **By** menus to determine hanging options.
- Use the **Spacing** options to determine line spacing.

Click **OK** to save paragraph settings.

▼ **Add Images**

Click **Add Image** to add images to documents:
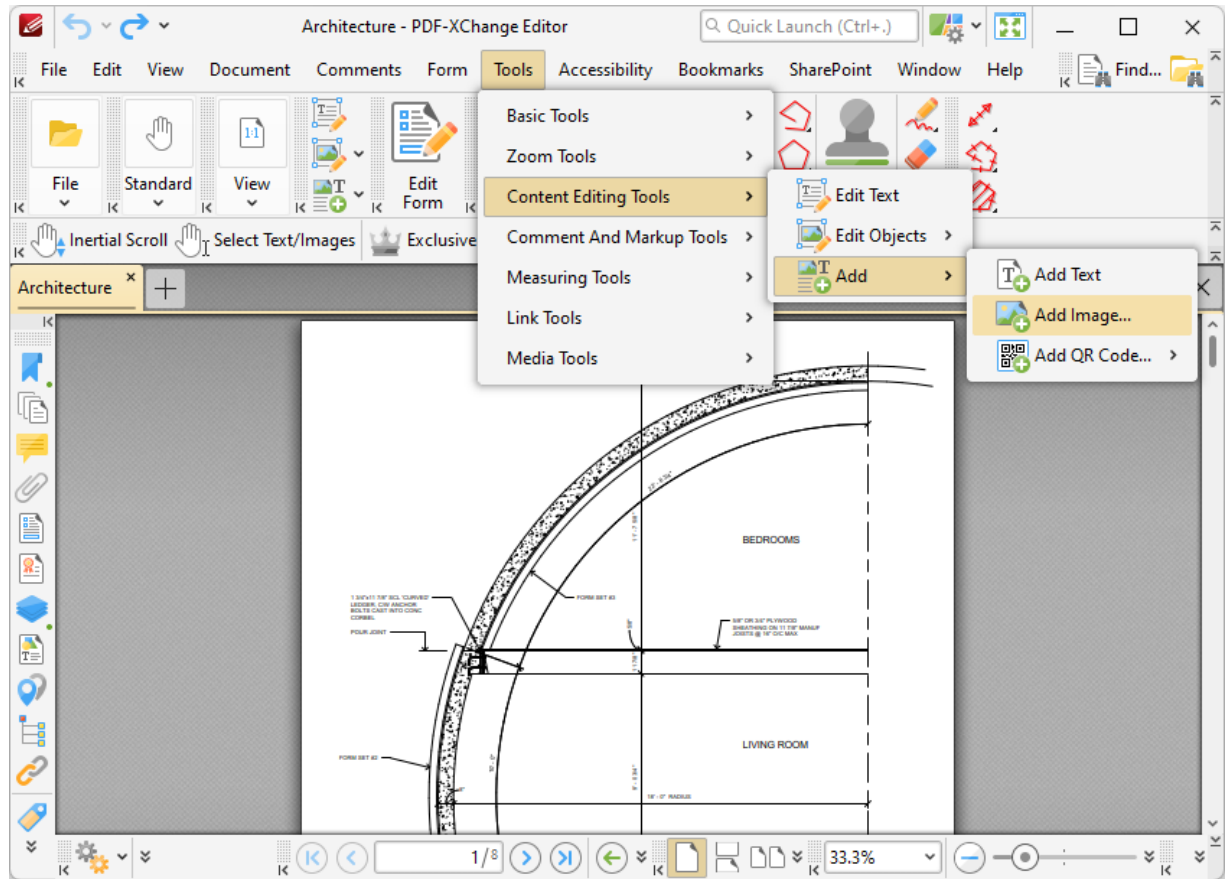
Figure 14. Tools Tab Submenu, Add Image Tool

The **Select Image Placement Tool** dialog box will open. Click **Drag Image Rectangle,** then click and drag to determine the location at which the image is inserted. The **Open Files** dialog box will open. Select an image from the local computer. The **Add Image** dialog box will open:

Figure 15. Add image Dialog Box

- Click the folder icon to select an alternative file.
- Select an option to determine how the image is added:
  - **As a Stamp** adds images as stamp annotations, as detailed **here.** [940]
  - **As a Content Item** adds images as content items.

Please note that stamps and content items feature different editing options.

Click **Place** to add images.

▼ **Add Barcodes**

Barcodes provide a useful method for the storage of information that barcode readers and mobile devices such as smartphones and tablets can access. Hover over **Add QRCode** to add barcodes to documents:
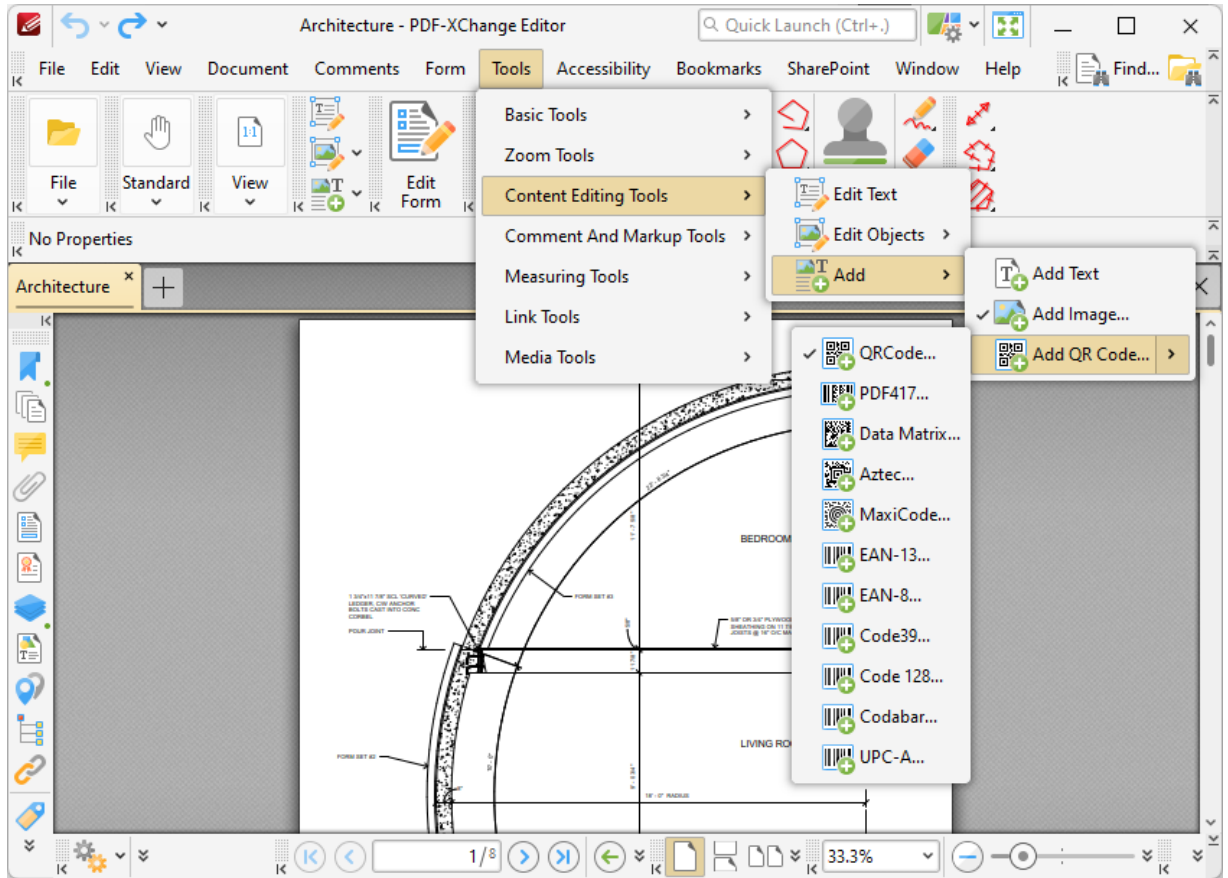
Figure 16. Add Submenu, Add Barcode

Select the type of barcode you want to add to the document. The **Select Barcode Placement Tool** dialog box will open. Click **Drag Barcode Rectangle** to add a new barcode. The pointer will turn into a crosshairs. Click and drag to determine the size and location of the barcode. The following dialog box will open:
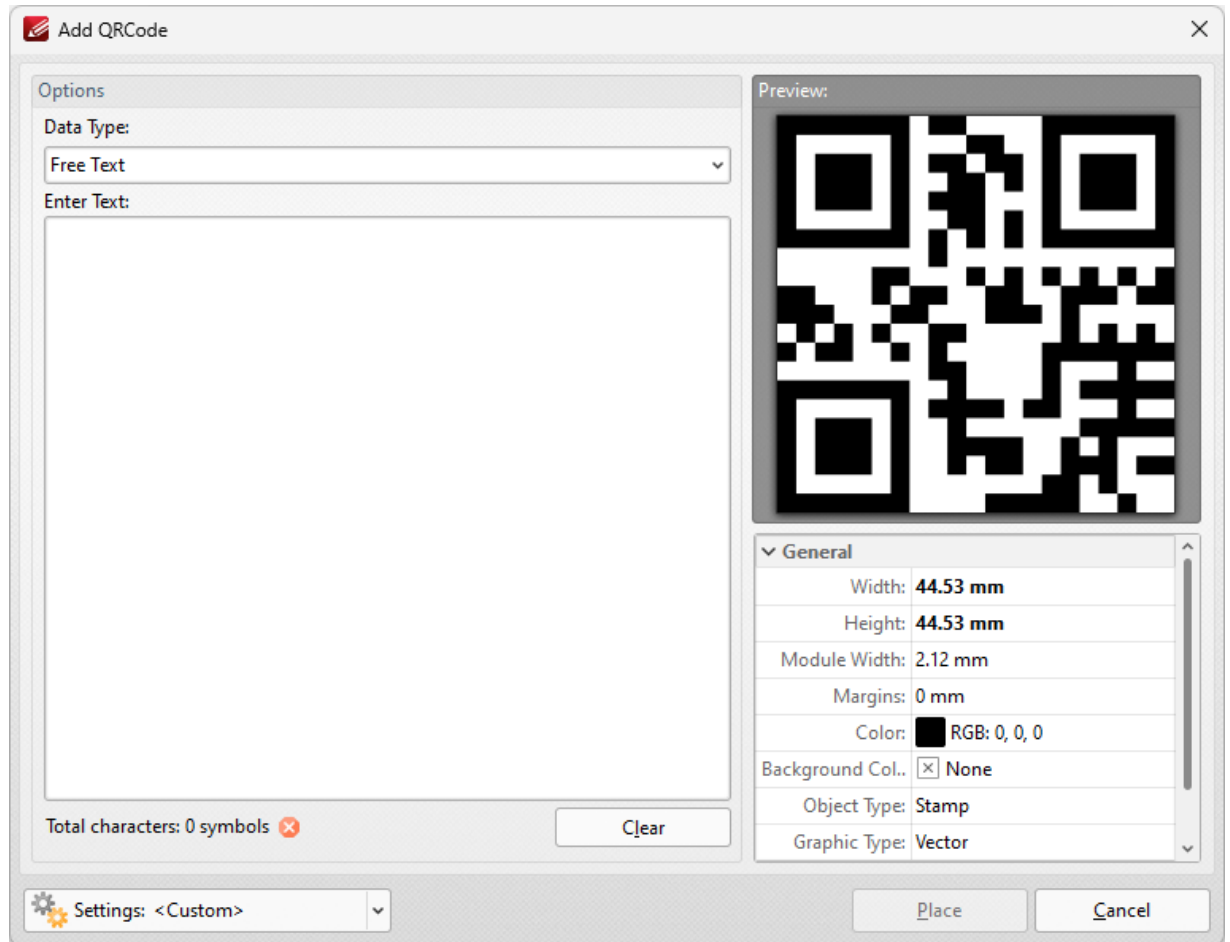
Figure 17. Add Barcode Dialog Box

- Use the **Data type** menu to set the format of the data contained in the barcode:
  - **Free Text** is used to store text-based content.
  - **URL** is used to store internet addresses.
  - **Email** is used to store information in email format.
  - **Telephone Number** is used to store information in phone number format.
  - **Contact (vCard)** is a file format standard that is used to store electronic business cards.
- Enter any desired test in the **Enter Text** window. Barcodes are created automatically when data is entered, and can be viewed in the preview pane.
- Barcode properties are detailed beneath the preview pane and can be edited as desired.

Click **Place** to add the barcode to the document.

5.7.4   Comment And Markup Tools

Comment And Markup Tools

Hover over **Comment And Markup Tools** to open the following submenu:
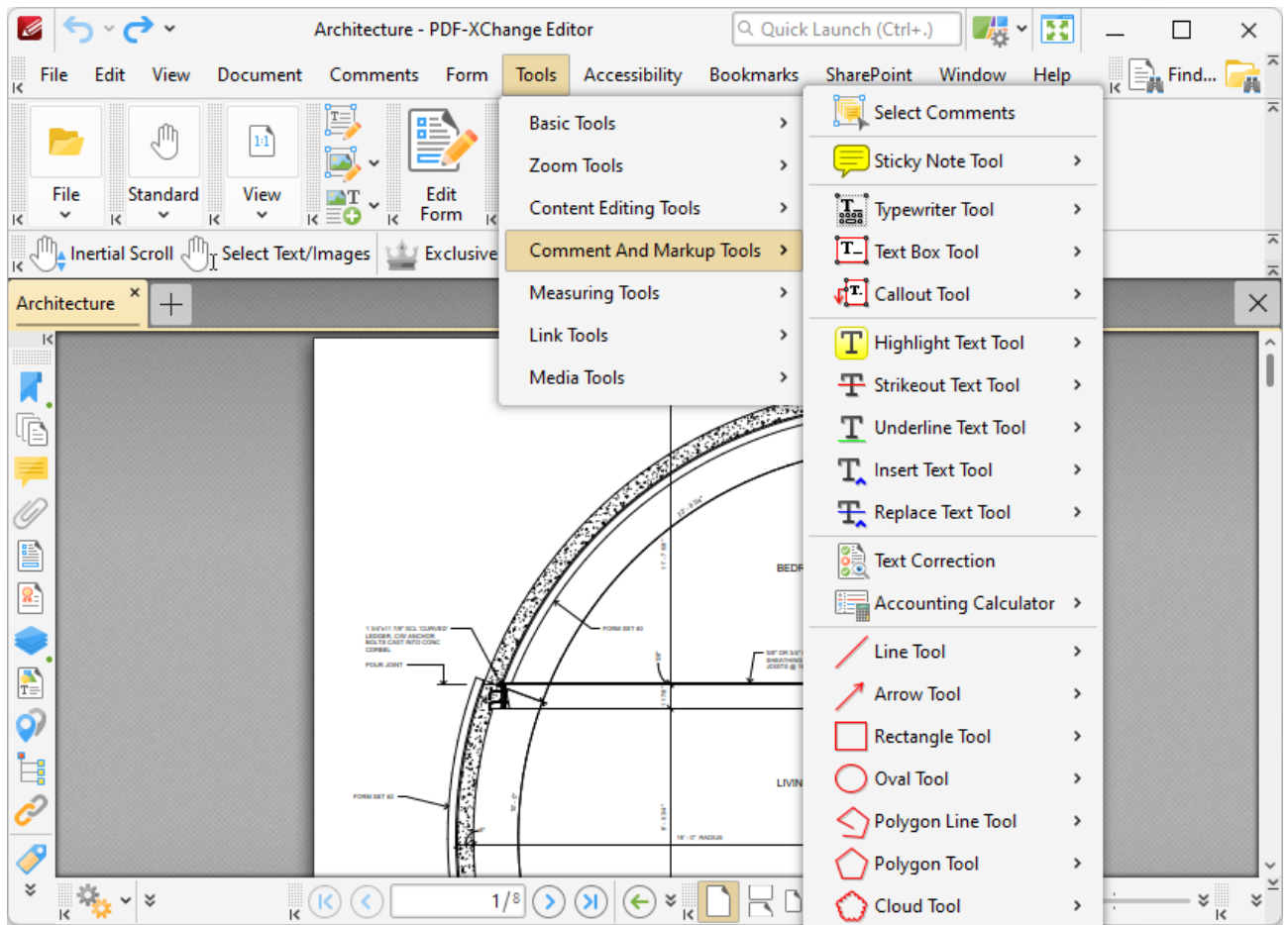
Figure 1. Comment and Markup Tools Submenu

These tools are used to mark up, comment and annotate documents:

- The **Select Comments Tool** 823 is used to select and edit comments.
- The **Sticky Note Tool** 849 is used to add sticky note annotations to documents.
- The **Typewriter Tool** 854 is used is to add typewriter note annotations to documents.

- The **Text Box Tool** [859] is used to add text boxes to documents.
- The **Callout Tool** [864] is used to add callout annotations to documents.
- The **Highlight Text Tool** [869] is used to highlight text.
- The **Strikeout Text Tool** [873] is used to strikeout text.
- The **Underline Text Tool** [877] is used to underline text.
- The **Insert Text Tool** [881] is used to assist in editing text, and inserts caret annotations that indicate where text should be inserted into the document.
- The **Replace Text Tool** [886] is used to assist in editing text, and inserts caret annotations that indicate where text should be replaced in the document.
- The **Text Correction** [892] option is used to assist in editing text, and inserts annotations that indicate text should be removed from documents or replaced with different text.
- The **Accounting Calculator** [894] is used to perform accounting calculations and create accounting lists that can be added to documents.
- The **Line Tool** [899] is used to add line annotations to documents.
- The **Arrow Tool** [899] is used to add arrow annotations to documents.
- The **Rectangle Tool** [911] is used to add rectangle annotations to documents.
- The **Oval Tool** [911] is used is used to add oval annotations to documents.
- The **Polygon Line Tool** [911] is used to create open shapes that have multiple segments.
- The **Polygon Tool** [911] is used to create closed, straight-line shapes that have multiple segments.
- The **Cloud Tool** [911] is used to create closed, squiggly-line shapes that have multiple segments.
- The **Stamp Tool** [940] is used to add stamps to documents. Several default stamps are available, such as 'Approved' and 'Confidential' - and it is also possible to create custom stamps.
- The **Pencil Tool** [911] is used to add pencil annotations to documents.
- The **Eraser Tool** [911] is used to erase pencil annotations.
- The **File Attachment Tool** [960] is used to attach files to documents, and places icons in documents that link to the specified file when they are clicked.
- The **Sound Tool** [964] is used to add sound effects to documents, and places icons in documents that play the specified sound when they are clicked.
- The **Comment Styles Palette** [791] is used to view/edit comment styles.
- and **Stamps Palette** [943] is used to view/edit stamps.

Note that the **Commenting** [250] preferences can be used to edit comment viewing/creation preferences.

5.7.4.1 Select Comments

Select Comments

Click **Select Comments** to edit comments/annotations:
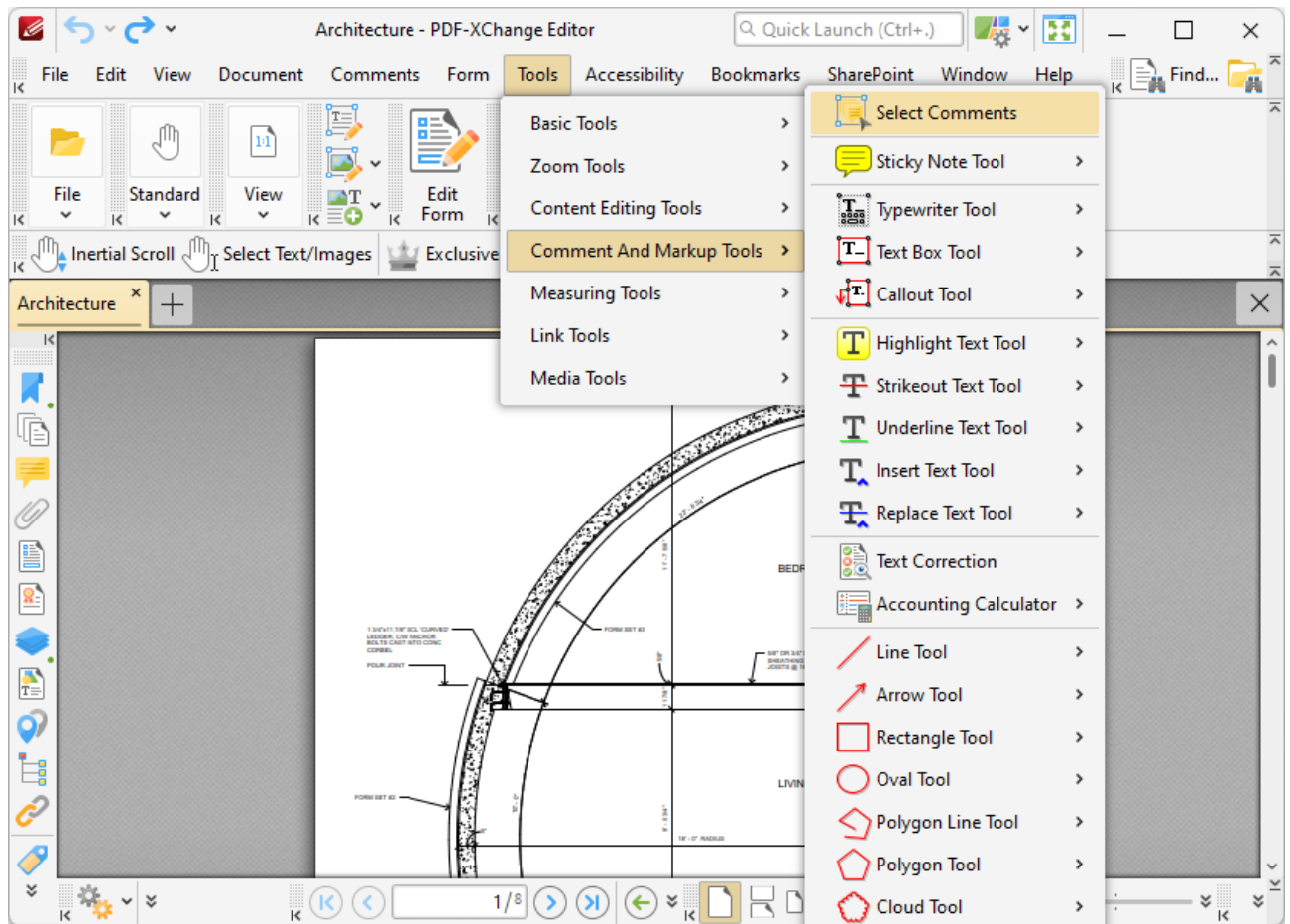
Figure 1. Tools Tab Submenu, Select Comments

Click to select comments, or click and drag to select multiple comments:
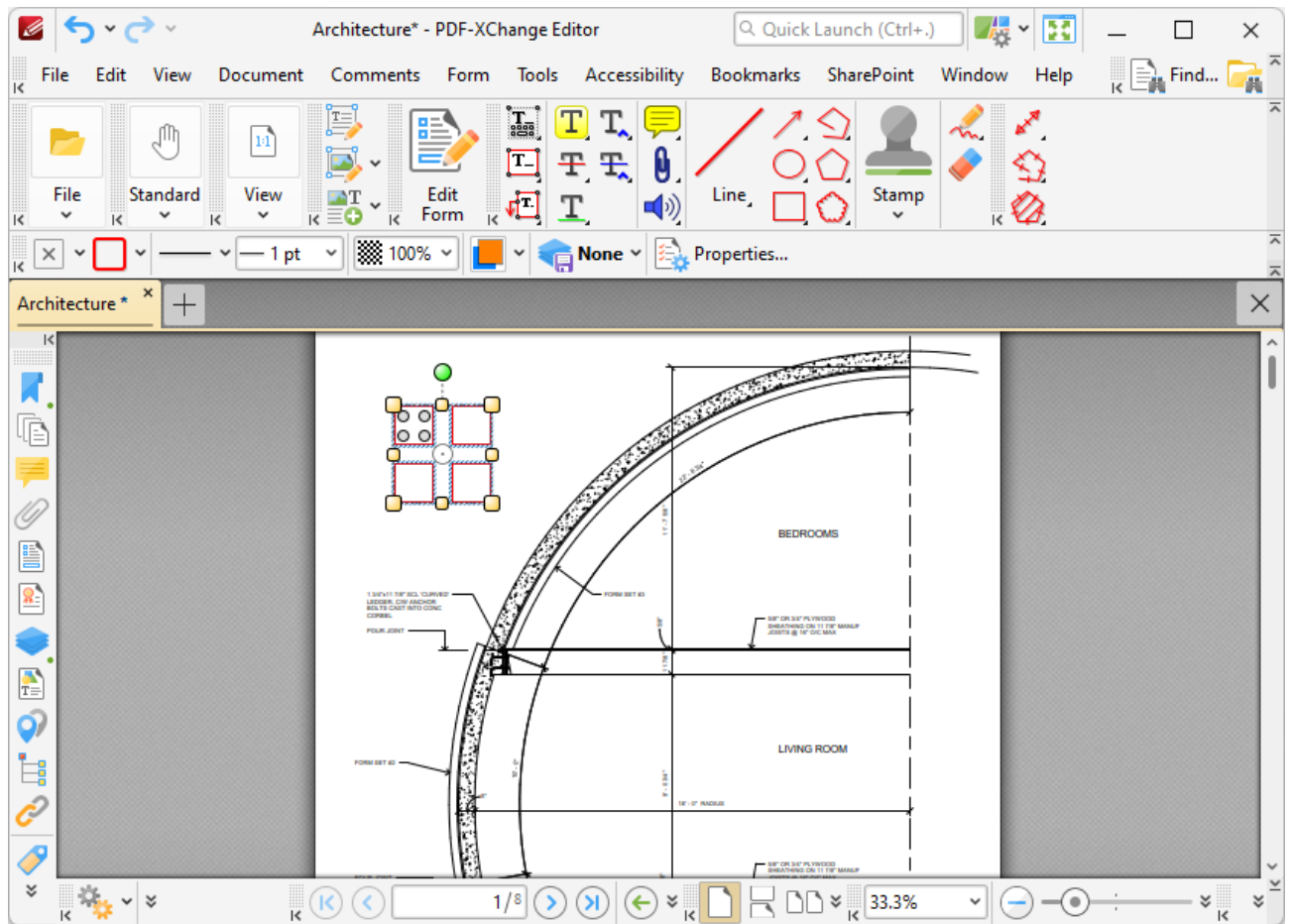
Figure 2. Select Comments, Group Select

- Click and drag control points to resize content.
- Click and drag content to reposition it. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate content. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition content.
- Use the editing aids detailed **here** [610] to assist in the precise placement of document content.
- The main properties of selected comments are detailed in the **Properties Toolbar** [485] and can be edited as desired. Click **Properties** to open the **Properties** pane and view/edit a complete list of properties for selected comments. Available properties depend on the type of comments selected. Note that the subject and author properties can be updated for multiple selected comments simultaneously.
- Right-click comments to enable further options. See **here** [1120] for an explanation of these options.
- The **Commenting** [250] section of the **Preferences** [228] dialog box can be used to view/edit preferences for comments.
- Please note that when **Customized Comment Styles** [791] have been created it is possible to switch between styles when comments are selected.

Please note that to select text after a text box has been completed it is necessary to click to select the text box and then click again to select the text. This is because **PDF-XChange Editor** must recognize text boxes and the text that text boxes contain as separate items as they feature different editing options. See **here** 837 for information on editing text boxes.

5.7.4.2   Sticky Note Tool

 Sticky Note Tool

Click **Sticky Note Tool** to add sticky note annotations to documents:
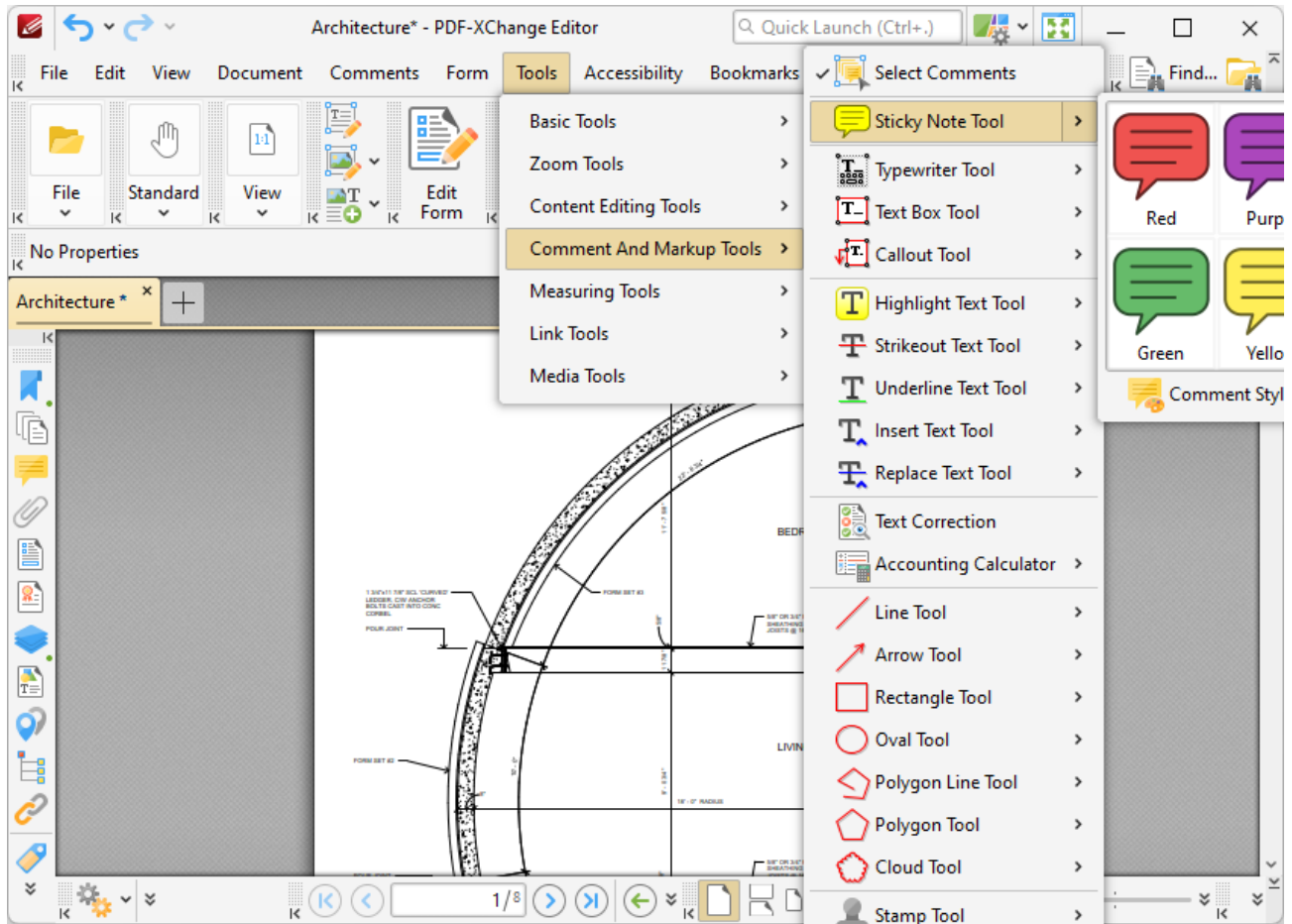
Figure 1. Tools Tab Submenu, Sticky Note Tool

Sticky note annotations enable the storage of text notes. Text is contained in a collapsible text box that can be expanded as required. When the text box is collapsed, only the sticky note icon remains in the document. This means that large text notes can be stored in documents without taking up excessive space.

When the **Sticky Note Tool** is selected, click to add sticky notes:
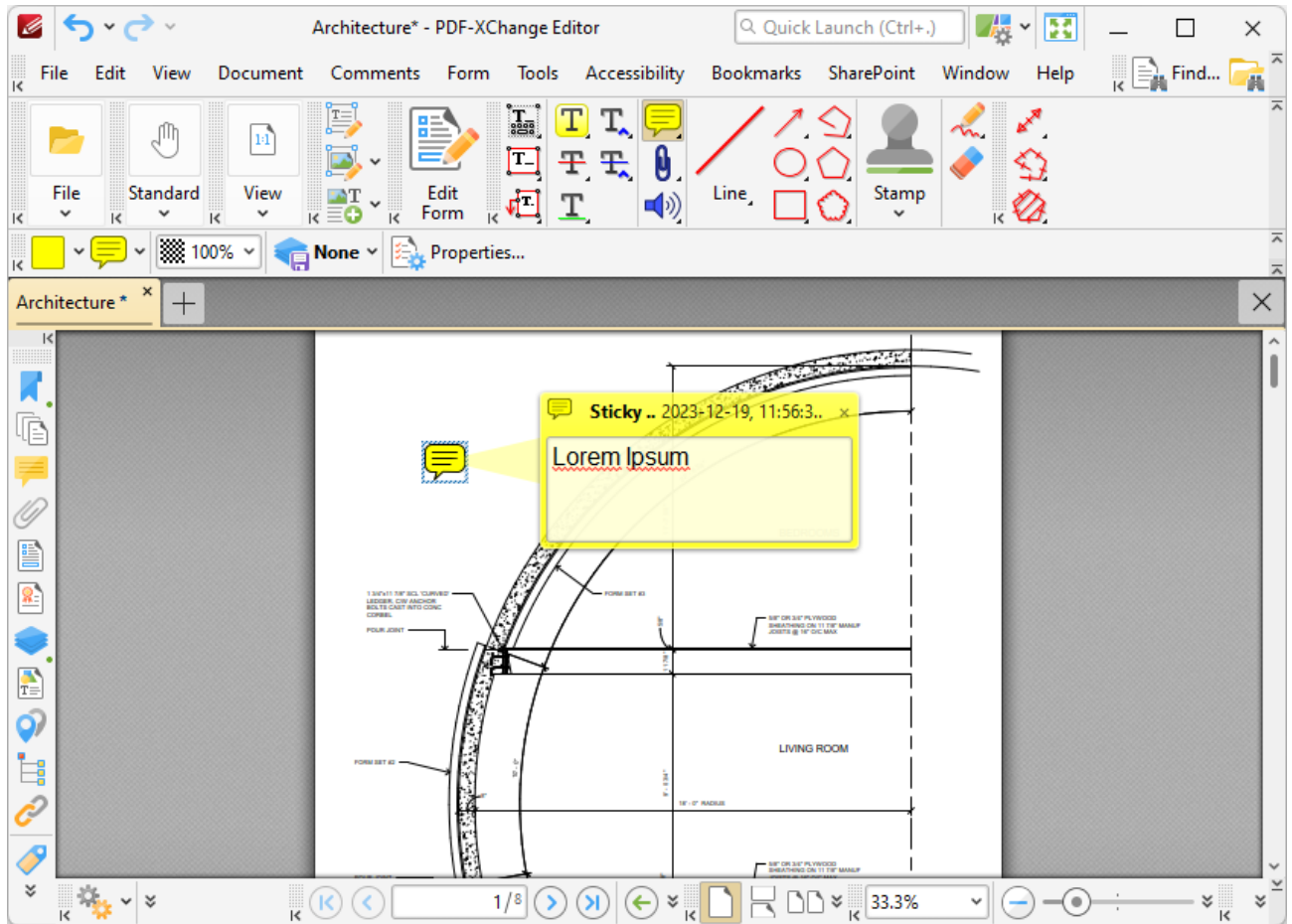
Figure 2. Sticky Note Tool Example

- Click and drag the sticky note to reposition it.
- Enter the desired note content within the associated pop-up note text box. This content will be displayed when the pointer is hovered over the icon subsequently. Text style options are enabled in the **Properties Toolbar** 485 when text is being entered. See **here** 1288 for an explanation of these options. Right-click when entering/editing text to launch the text editing options menu. These options are explained **here.** 835
- Use the arrow keys to reposition sticky notes. Hold down Shift to move at an increased increment.
- Right-click sticky notes for further options. See **here** 1120 for an explanation of these options.
- Sticky note options are enabled in the **Properties Toolbar** 485 when the **Sticky Note Tool** is selected:
    - **Fill Color** determines the color of the sticky note. Click the color box to select the fill color.
    - **Icon** determines the icon of the sticky note. Click the icon to select which icon to use for sticky notes.

- **Opacity** determines the level of transparency for the sticky note. Click the opacity icon to select a new value for the opacity.
- **Keep Selected** determines whether or not the **Sticky Note Tool** remains selected after a single sticky note has been created. If this option is enabled then the tool will remain selected and can be used to create several sticky notes consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a sticky note.
- **Exclusive Mode** simplifies the process of using the **Sticky Note Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create sticky notes on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional sticky note properties, as detailed below.
- Note that several default colors are available for sticky notes, as detailed in *(figure 1).* Click to select alternative sticky note colors. The **Comment Styles Palette** ⁷⁹¹ can be used to edit and save customized sticky note styles for subsequent use. Right-click the **Sticky Note** icon in the **Comment Toolbar** ³¹⁷ to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** ²⁵⁰ section of the **Preferences** ²²⁸ dialog box can be used to view/edit preferences for comments.

Sticky Note Properties Pane
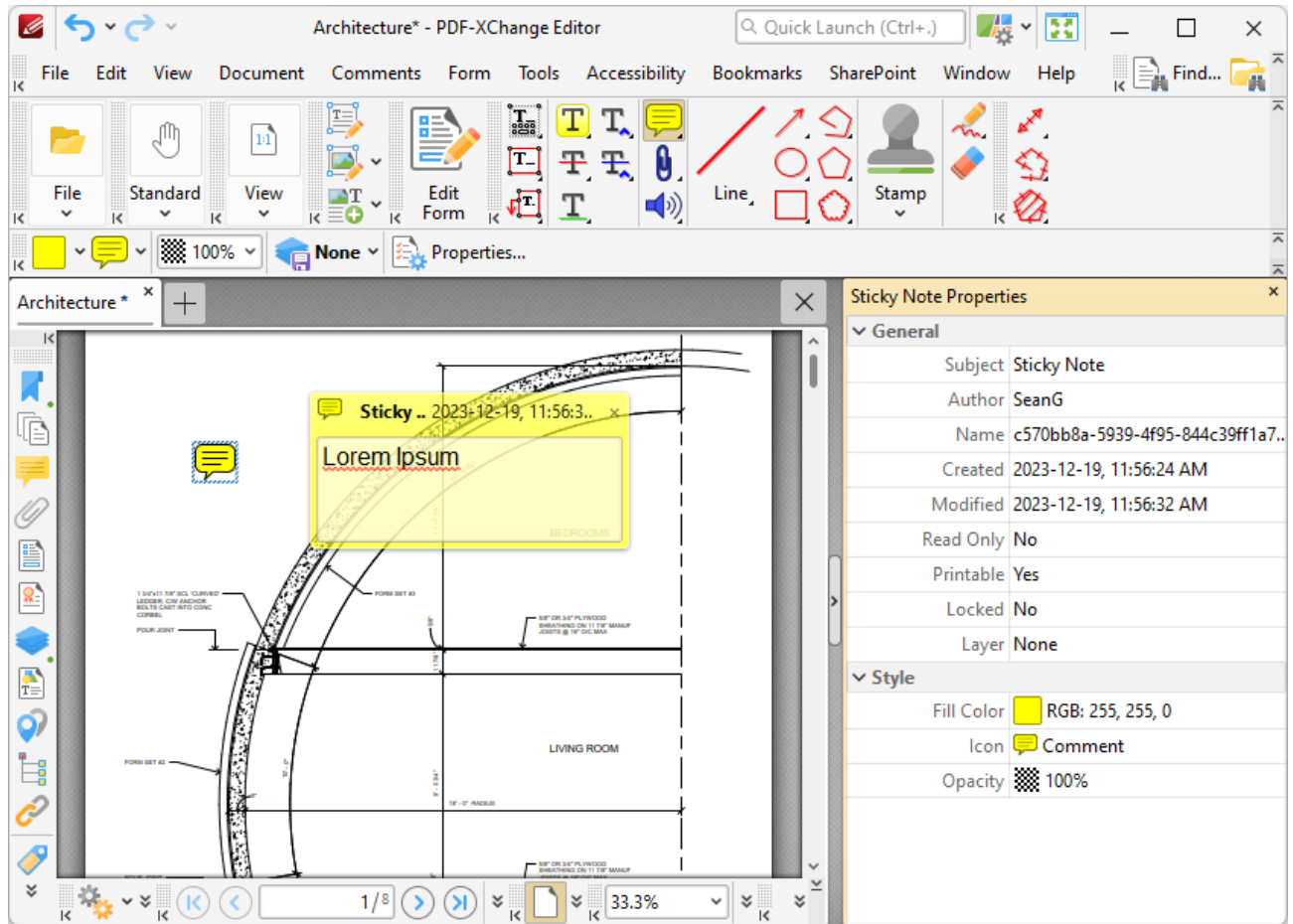
Figure 3. Sticky Note Properties Pane

- **Subject** is the name of the sticky note comment, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the sticky note comment.
- **Name** is the unique name of the sticky note comment, as referenced within the application.
- **Created** is the date and time at which the sticky note comment was created.
- **Modified** is the date and time at which the sticky note comment was last modified.
- **Read Only** is the read only status of the sticky note comment. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the sticky note comment. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Locked** is the locked status of the sticky note comment. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the sticky note comment belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the sticky note comment.
- **Icon** determines the icon used for the sticky note comment.

- **Opacity** determines the level of transparency in the sticky note comment.

5.7.4.3 **Typewriter Tool**

Typewriter Tool

Click **Typewriter Tool** to add typewriter annotations to documents:
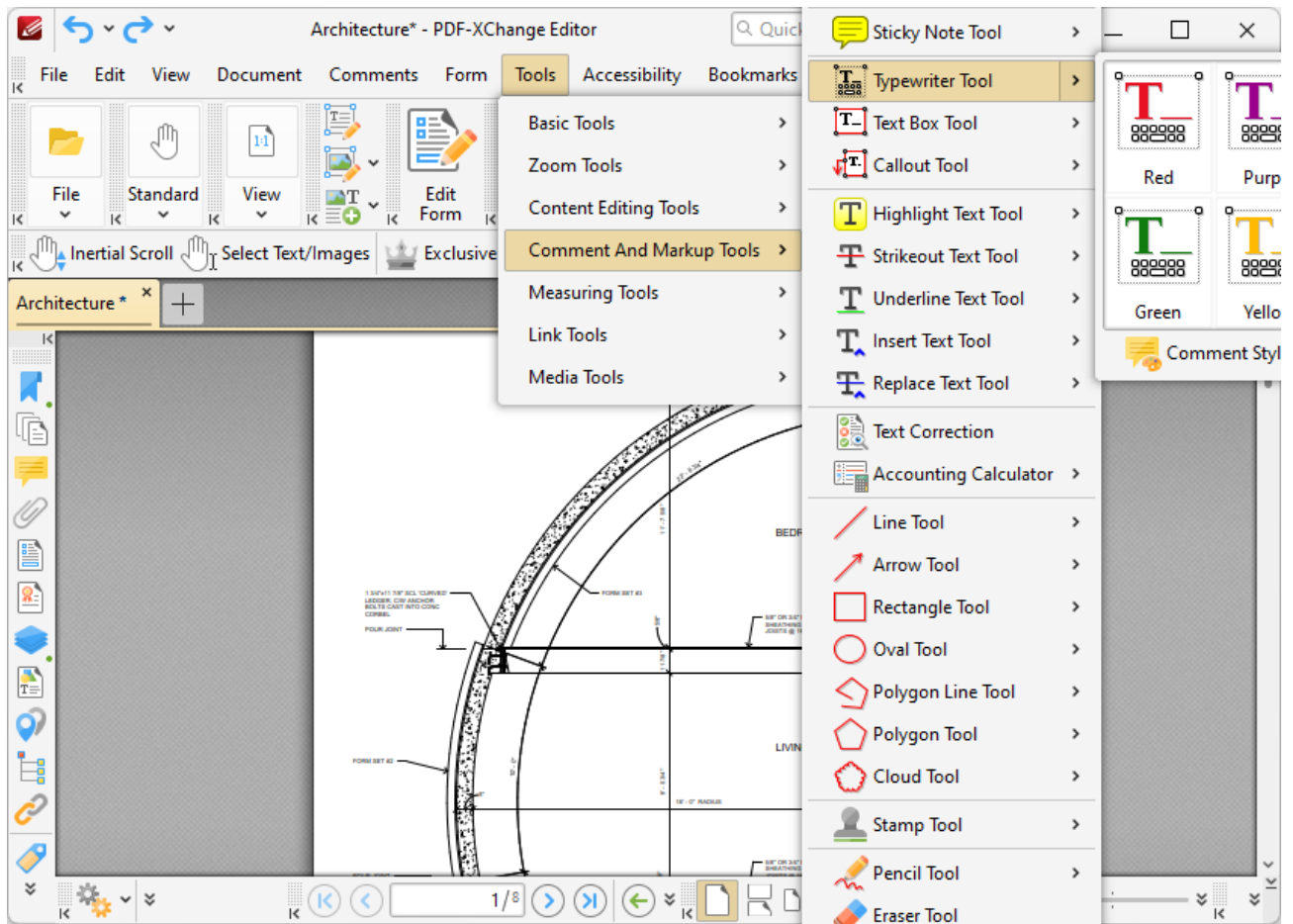
Figure 1. Tools Tab Submenu, Typewriter Tool

When the **Typewriter Tool** is selected, click to add typewriter notes:
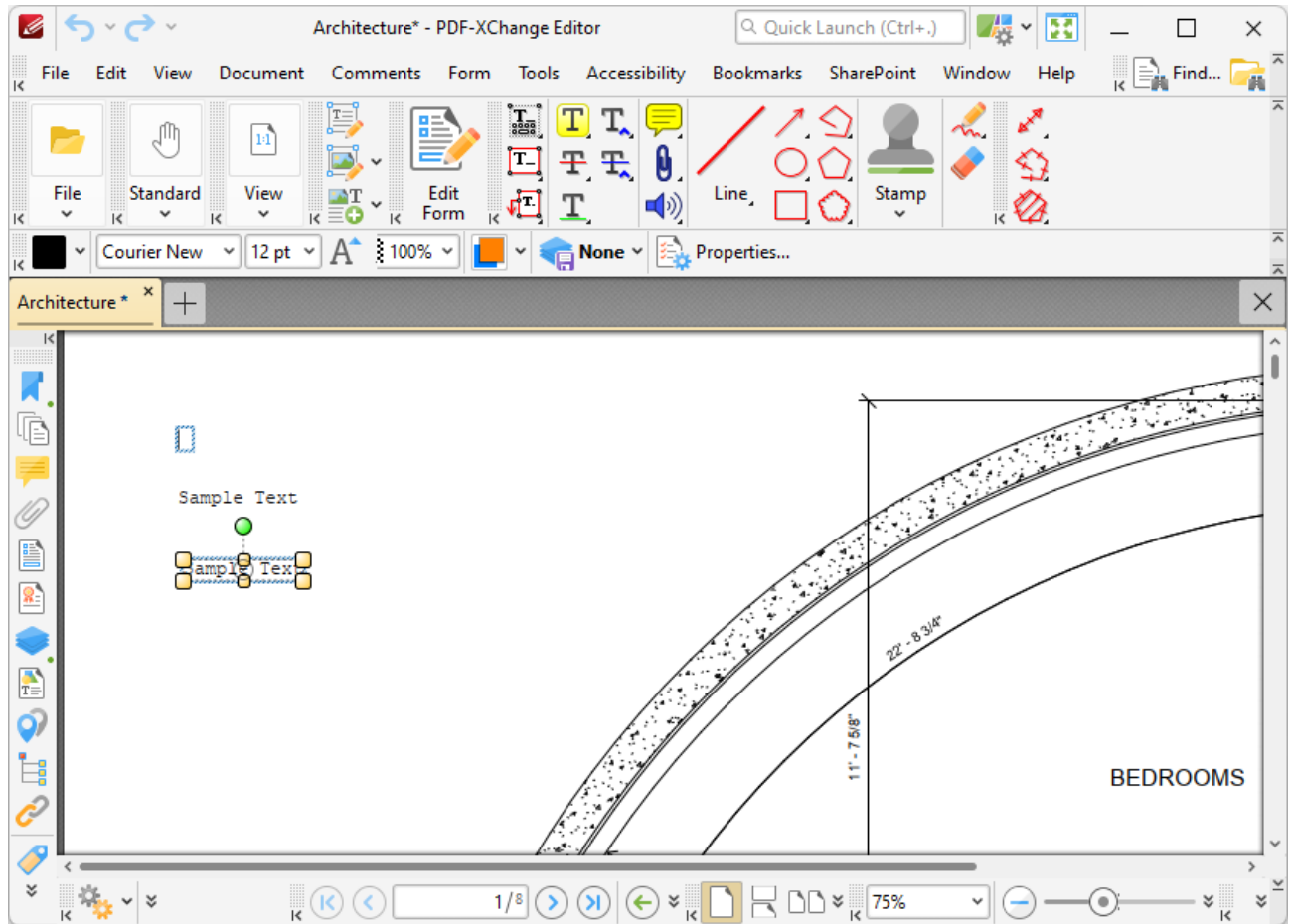
Figure 2. Typewriter Tool Examples

- The upper image is how a typewriter note appears when it is first inserted into a document. Enter the desired text using the keyboard. Press **Enter** to start new lines. Text style options are enabled in the **Properties Toolbar** ⌊485⌋ when text is being entered. See **here** ⌊1288⌋ for an explanation of these options.
- The central image is how a typewriter note appears when text is being entered. Right-click typewriter notes to launch the text editing options menu. Text editing options are explained **here.** ⌊835⌋
- The lower image is how a typewriter note appears when it is completed and subsequently selected.
    - Click and drag the control points to resize typewriter text boxes.
    - Click and drag typewriter text boxes to reposition them.
    - Click and drag the green control point to rotate typewriter text boxes. Hold down Shift to rotate at increments of fifteen degrees.
    - Use the arrow keys to reposition typewriter text boxes. Hold down Shift to move at an increased increment.
    - Use the editing aids detailed **here** ⌊610⌋ to assist in the precise placement of typewriter text boxes.

- Right-click typewriter text boxes for further options. See **here** 1120 for an explanation of these options.
- When the **Typewriter Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the color of the typewriter text box.
    - **Stroke Color** determines the the border color of the typewriter text box.
    - **Border Style** determines the style of the border used around the typewriter text box.
    - **Border Width** determines the width of the border used around the typewriter text box.
    - **Opacity** determines the level of transparency for typewriter text boxes and their content.
    - **Blend Mode** determines how typewriter text boxes blend with underlying content. These options are explained **here.** 1107
    - **Keep Selected** determines whether or not the **Typewriter Tool** remains selected after a typewriter note has been created. If this option is enabled then the tool will remain selected and can be used to create several typewriter notes consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a typewriter note.
    - **Exclusive Mode** simplifies the process of using the **Typewriter Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create typewriter notes on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
    - Click **Properties** to view/edit additional **Typewriter Tool** properties, as detailed below.
- Note that several default colors are available for typewriter notes, as detailed in *(figure 1).* Click to select alternative text colors for typewriter notes. The **Comment Styles Palette** 791 can be used to save customized typewriter note styles for subsequent use. Right-click the **Typewriter Note** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

Please note that to select text after a typewriter text box has been completed it is necessary to click to select the typewriter text box and then click again to select the text. This is because **PDF-XChange Editor** must recognize text boxes and the text that text boxes contain as separate items as they feature different editing options. See **here** 835 for information on editing typewriter text box text.

Typewriter Properties Pane
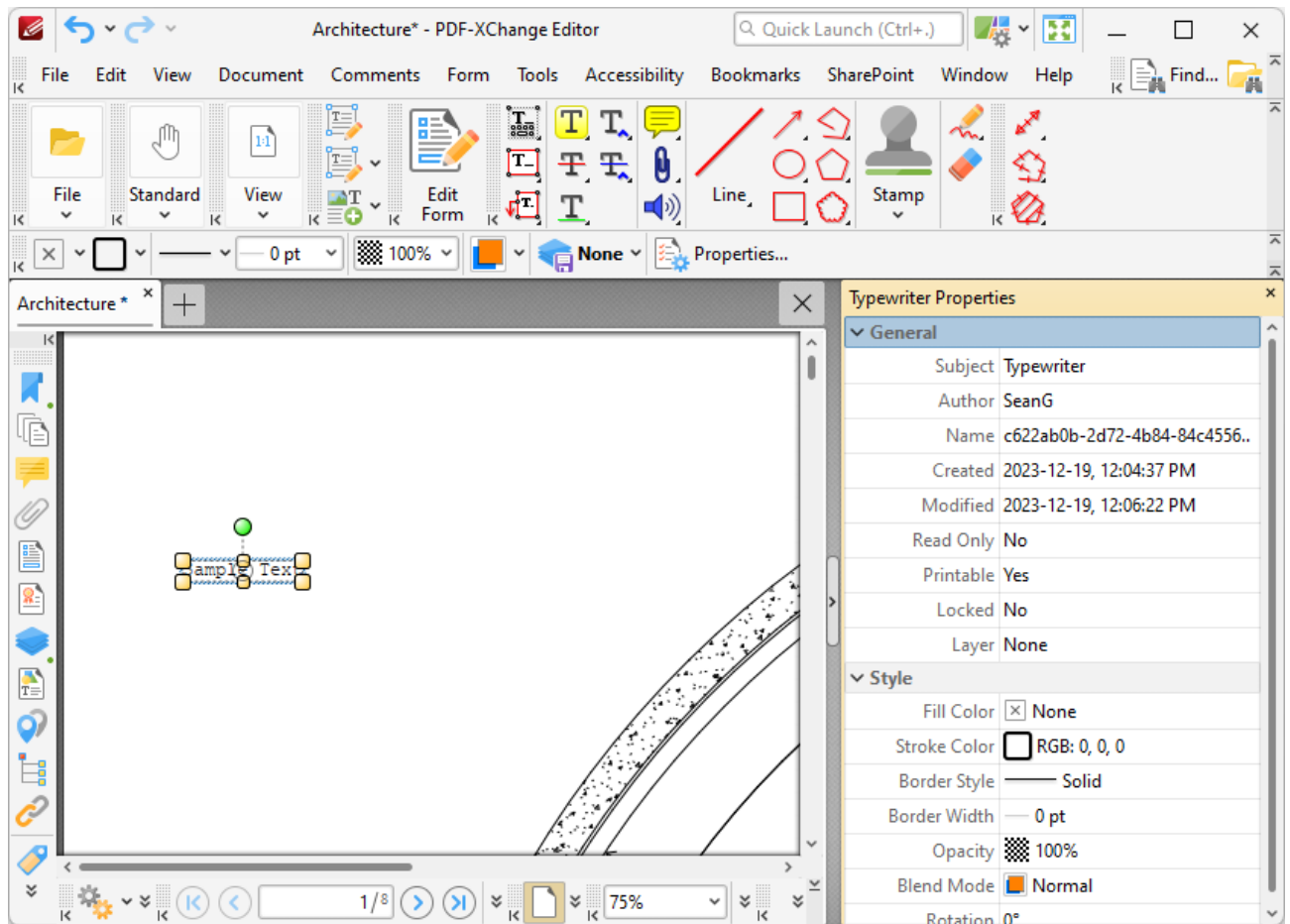
Figure 3. Typewriter Properties Pane

- **Subject** is the name of the typewriter note comment, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the typewriter note comment.
- **Name** is the unique name of the typewriter note comment, as referenced within the application.
- **Created** is the date and time at which the typewriter note comment was created.
- **Modified** is the date and time at which the typewriter note comment was last modified.
- **Read Only** is the read only status of the typewriter note comment. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the typewriter note comment. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Locked** determines the locked status of the typewriter note comment. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** determines the optional content layer to which the typewriter note comment belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the typewriter note comment.

- **Stroke Color** determines the border color of the typewriter note comment.
- **Border Width** determines the border width of the typewriter note comment.
- **Opacity** determines the level of transparency in the typewriter note comment.
- **Blend Mode** determines how the typewriter note comment blends with overlapping content, as detailed **here.** 1107
- **Rotation** determines the degrees of rotation of the typewriter note comment.

5.7.4.4   Text Box Tool

 Text Box Tool

Click **Text Box Tool** to add text box annotations to documents:
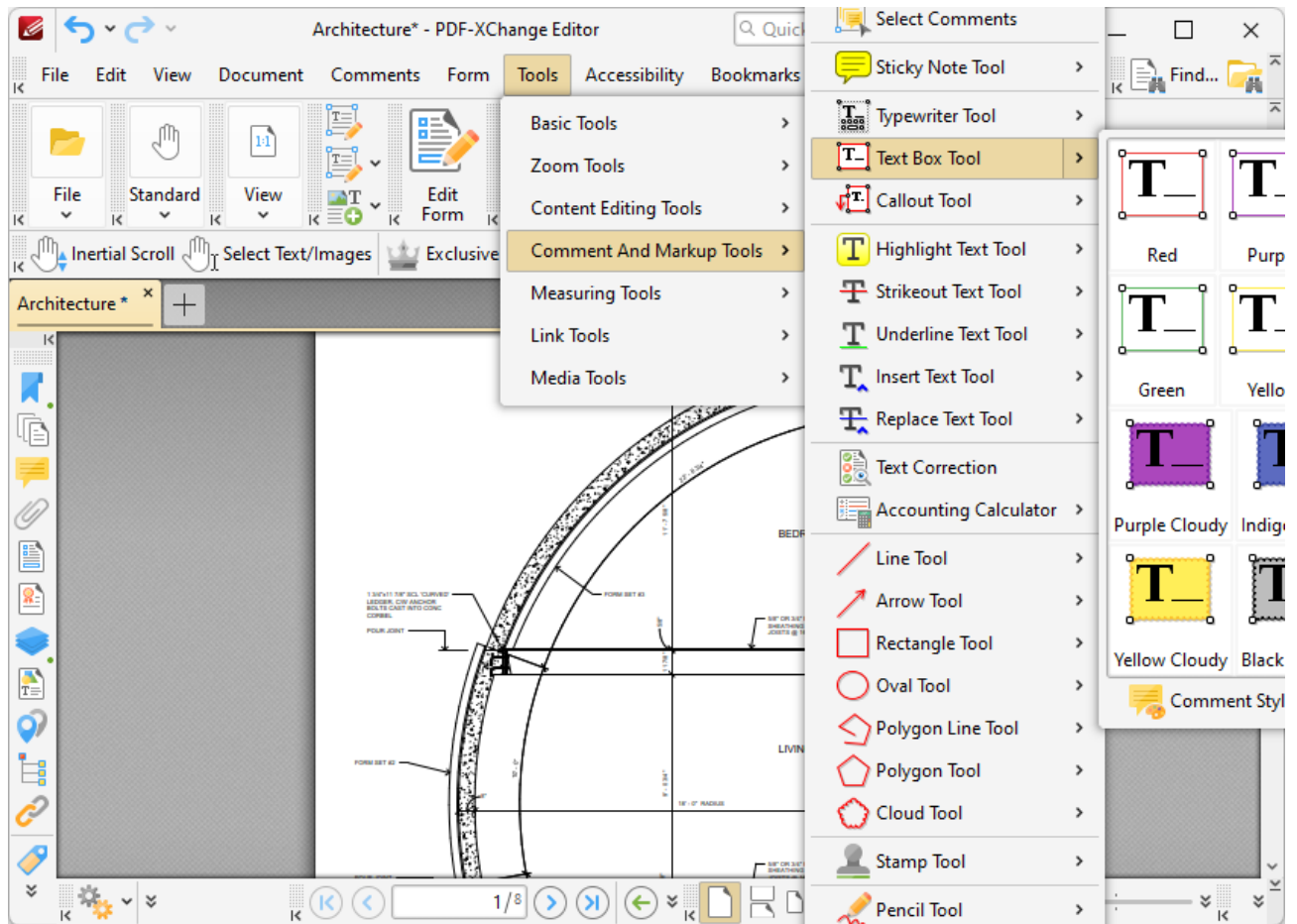
Figure 1. Tools Tab Submenu, Text Box Tool

When the **Text Box Tool** is selected, click and drag the pointer to determine the size of text boxes:
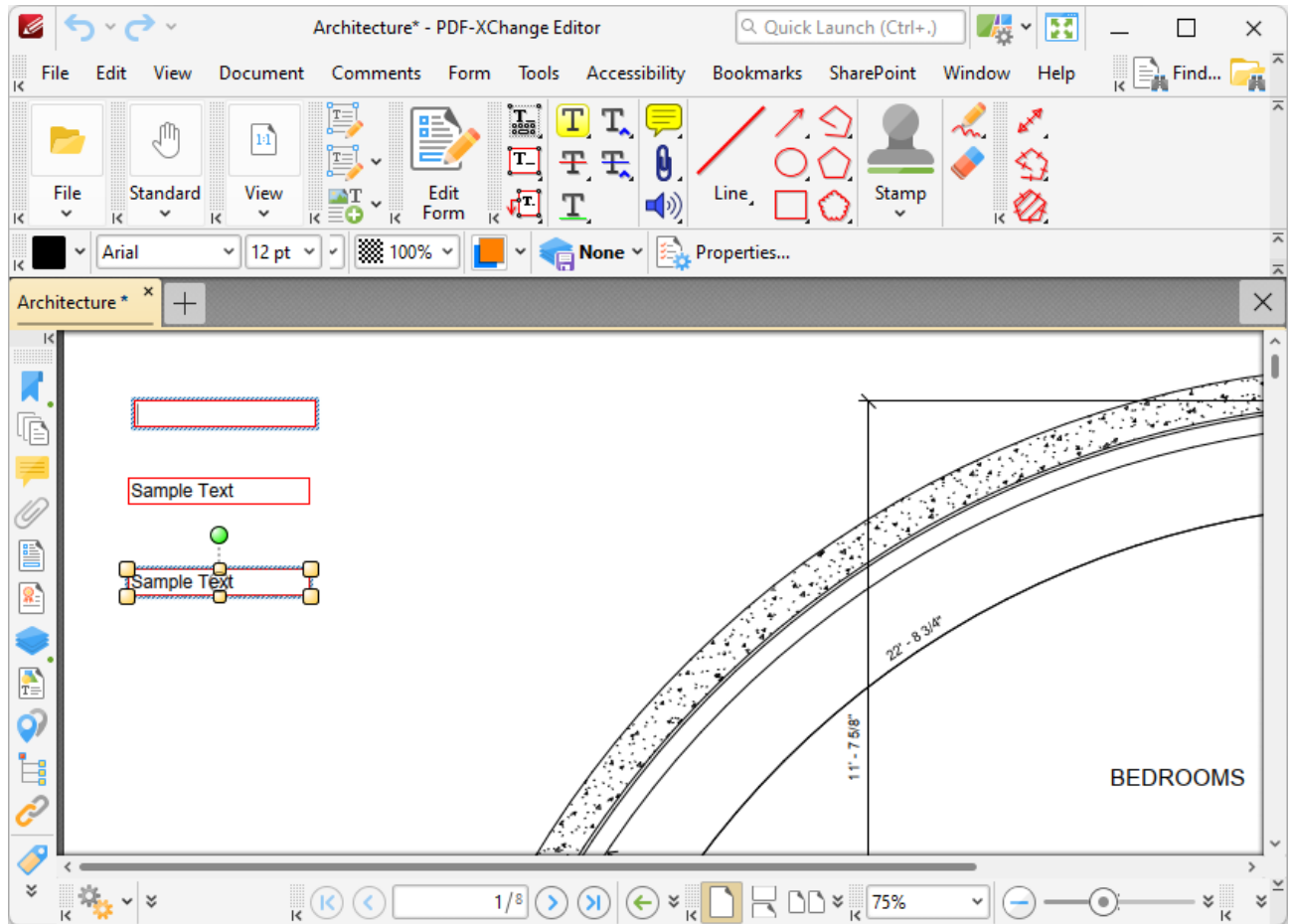
Figure 2. Text Box Tool Examples

- The upper image is how a text box appears when it is first inserted into a document. Enter the desired text using the keyboard. Press **Enter** to start new lines. Text style options are enabled in the **Properties** [485] **Toolbar** [485] when text is being entered. See **here** [1288] for an explanation of these options.
- The central image is how a text box appears when text is being entered. Right-click text boxes to launch the text editing options menu. Text editing options are explained **here.** [837]
- The lower image is how a text box appears when it is completed and subsequently selected.
  - Click and drag the control points to resize text boxes.
  - Click and drag text boxes to reposition them.
  - Click and drag the green control point to rotate text boxes. Hold down Shift to rotate at increments of fifteen degrees.
  - Use the arrow keys to reposition text boxes. Hold down Shift to move at an increased increment.
  - Use the editing aids detailed **here** [610] to assist in the precise placement of text boxes.
  - Right-click text boxes for further options. See **here** [1120] for an explanation of these options.
- When the **Text Box Tool** is selected, the following options are enabled in the **Properties Toolbar:** [485]
  - **Fill Color** determines the color of the text box.

- **Stroke Color** determines the the border color of the text box.
- **Border Style** determines the style of the border used around the text box.
- **Border Width** determines the width of the border used around the text box.
- **Opacity** determines the level of transparency for text boxes and their content.
- **Blend Mode** determines how text boxes blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Text Box Tool** remains selected after a text box has been created. If this option is enabled then the tool will remain selected and can be used to create several text boxes consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a text box.
- **Exclusive Mode** simplifies the process of using the **Text Box Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create text box notes on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit the additional text box properties, as detailed below.

- Note that several default styles are available for text boxes notes, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized text box styles for subsequent use. Right-click the **Text Box** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

Please note that to select text after a text box has been completed it is necessary to click to select the text box and then click again to select the text. This is because **PDF-XChange Editor** must recognize text boxes and the text that text boxes contain as separate items as they feature different editing options. See **here** 835 for information on editing text boxes.

Text Box Properties Pane
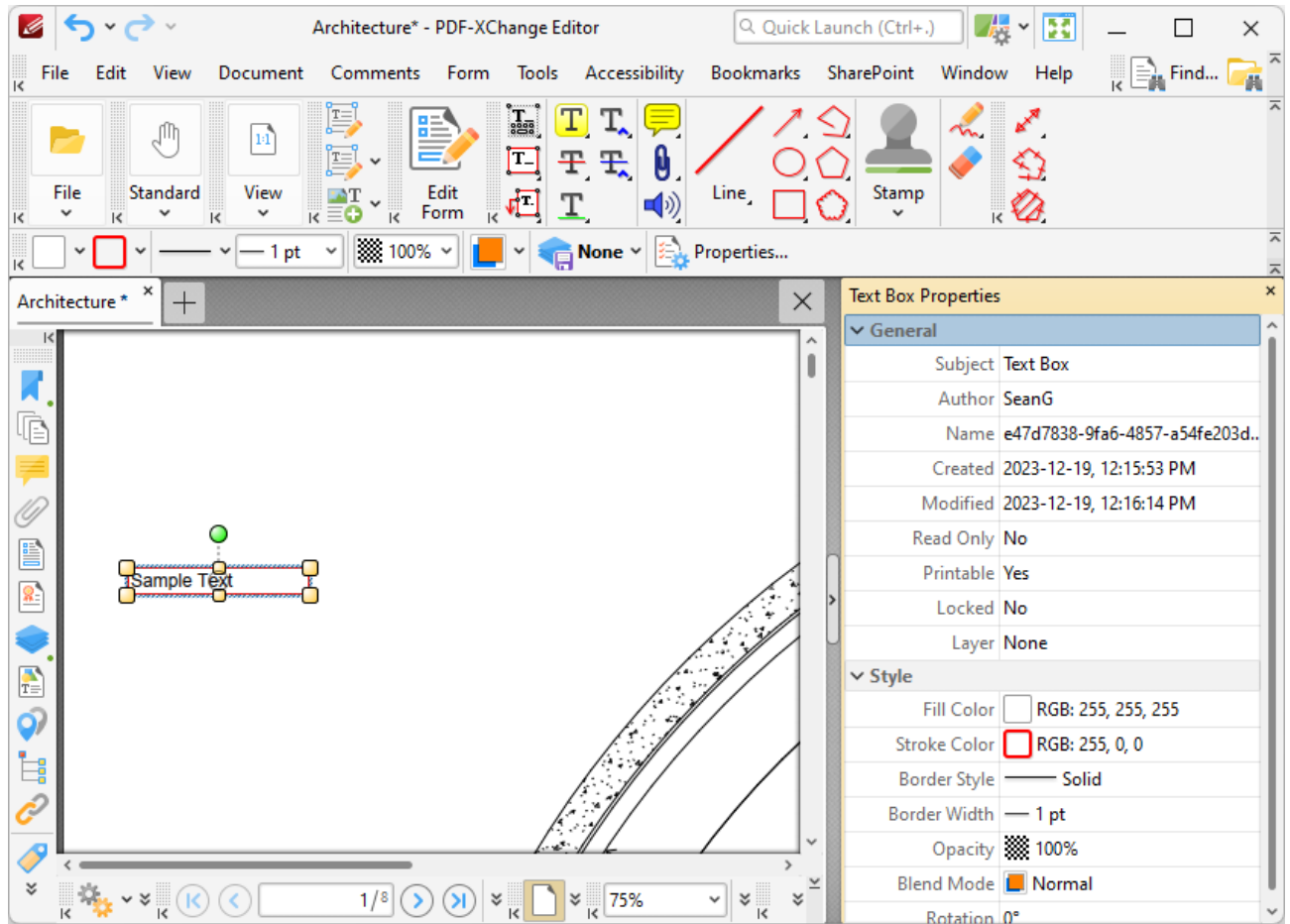
Figure 3. Text Box Properties Pane

- **Subject** is the name of the text box comment, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the text box comment.
- **Name** is the unique name of the text box comment, as referenced within the application.
- **Created** is the date and time at which the text box comment was created.
- **Modified** is the date and time at which the text box comment was last modified.
- **Read Only** is the read only status of the text box comment. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the text box comment. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Locked** is the locked status of the text box comment. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** is the optional content layer to which the text box comment belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the text box comment.
- **Stroke Color** determines the border color of the text box comment.

- **Border Style** determines the border style of the text box comment
- **Border Width** determines the border width of the text box comment.
- **Opacity** determines the level of transparency in the text box comment.
- **Blend Mode** determines how the text box comment blends with overlapping content, as detailed **here.** 1107
- **Rotation** determines the degrees of rotation of the text box comment.

5.7.4.5   Callout Tool

Callout Tool

Click **Callout Tool** to add callout annotations to documents:
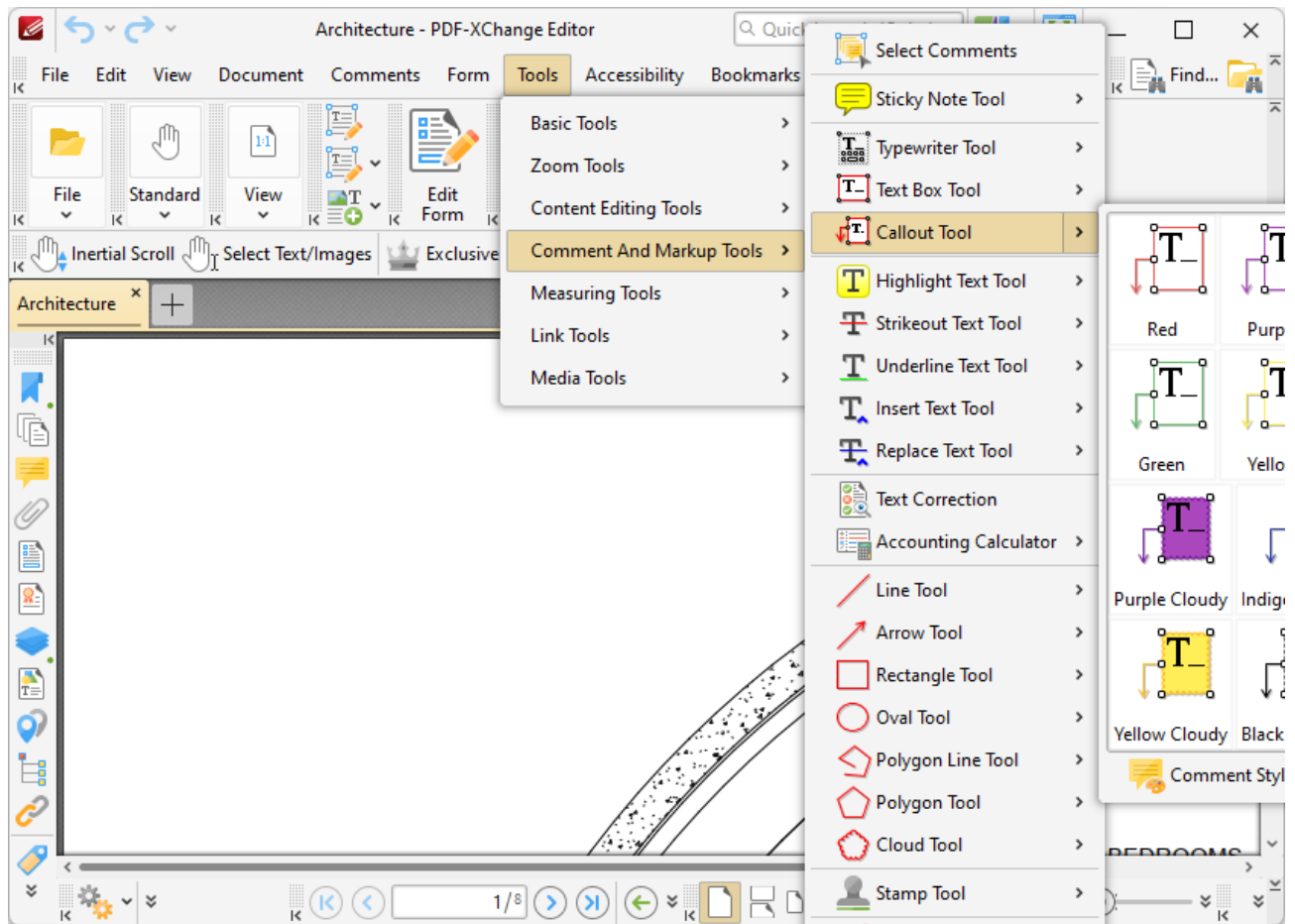
Figure 1. Tools Tab Submenu, Callout Tool

Callout annotations are used to highlight specific locations in documents. They are composed of a text box that features a linked arrow annotation, which is used to highlight the area of importance in the document.

When the **Callout Tool** is selected, click to add callout annotations. The position of the pointer when the mouse is clicked determines the initial position of the arrowhead in the callout arm. Detailed below are callout annotations at three stages of editing:
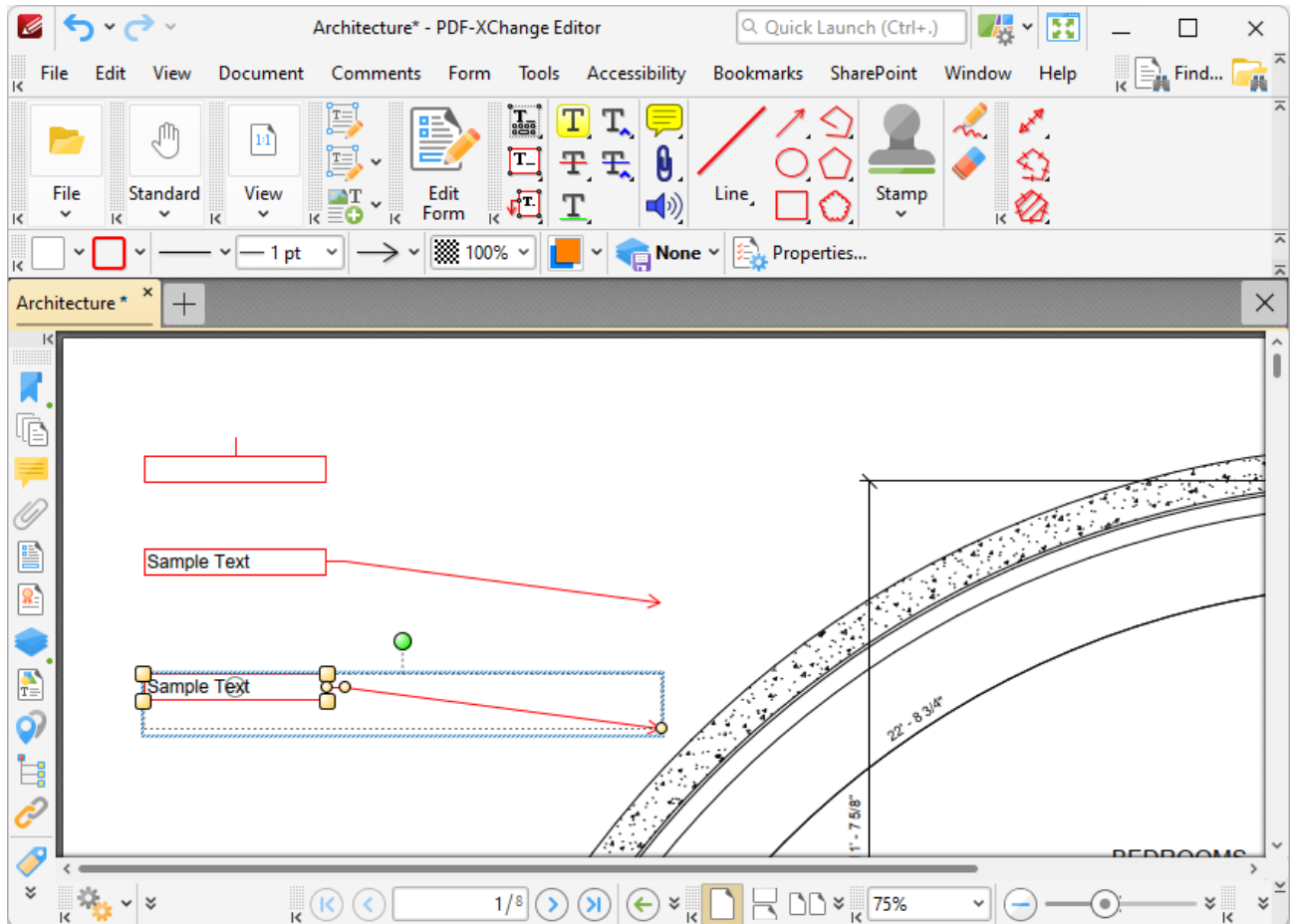
Figure 2. Callout Tool Examples

- The upper image is how a callout annotation appears when it is first inserted into a document. Enter the desired text using the keyboard. Press **Enter** to start new lines. Text style options are enabled in the **Properties Toolbar** 485 when text is being entered. See **here** 1288 for an explanation of these options.
- The central image is how a callout annotation appears when text is being entered. Right-click callout annotations to launch the text editing options menu. Text editing options are explained **here.** 835
- The lower image is how a callout annotation appears when it is completed and subsequently selected.
    - Click and drag the control points to resize callout annotations and/or reposition the callout arrow.
    - Click and drag callout annotations to reposition them.
    - Click and drag the green control point to rotate callout annotations. Hold down Shift to rotate at increments of fifteen degrees.

- Use the arrow keys to reposition callout annotations. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** ⌐610¬ to assist in the precise placement of callout annotations.
- Right-click callout annotations for further options. See **here** ⌐1120¬ for an explanation of these options.
- When the **Callout Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⌐485¬
  - **Fill Color** determines the color of the callout annotation.
  - **Stroke Color** determines the the border color of the callout annotation.
  - **Border Style** determines the style of the border used around the callout annotation.
  - **Border Width** determines the width of the border used around callout annotation.
  - **Line Ending Style** determines the shape at the end of the arm that comes from the callout annotation.
  - **Opacity** determines the level of transparency for callout annotations and their content.
  - **Blend Mode** determines how callouts blend with underlying content. These options are explained **here.** ⌐1107¬
  - **Auto Adjust Arm Position** relates to the callout arm. When this setting is disabled the control point from which the callout arm originates remains constant when callout annotations are repositioned. When this setting is enabled the control point from which callout arms originate changes automatically. The control point closest to the end of the callout arm will be used.
  - **Keep Selected** determines whether or not the **Callout Tool** remains selected after a callout annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several callout annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a callout text annotation.
  - **Exclusive Mode** simplifies the process of using the **Callout Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create callouts on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
  - Click **Properties** to view/edit additional callout properties, as detailed below.
- Note that several default styles are available for callout annotations, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** ⌐791¬ can be used to save customized callout annotation styles for subsequent use. Right-click the **Callout** icon in the **Comment Toolbar** ⌐317¬ to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** ⌐250¬ section of the **Preferences** ⌐228¬ dialog box can be used to view/edit preferences for comments.

Please note that to select text after a callout text box has been completed it is necessary to click to select the callout text box and then click again to select the text. This is because **PDF-XChange Editor**

must recognize callout text boxes and the text that they contain as separate items as they feature different editing options. See **here** 835 for information on editing callout text boxes.

Callout Properties Pane
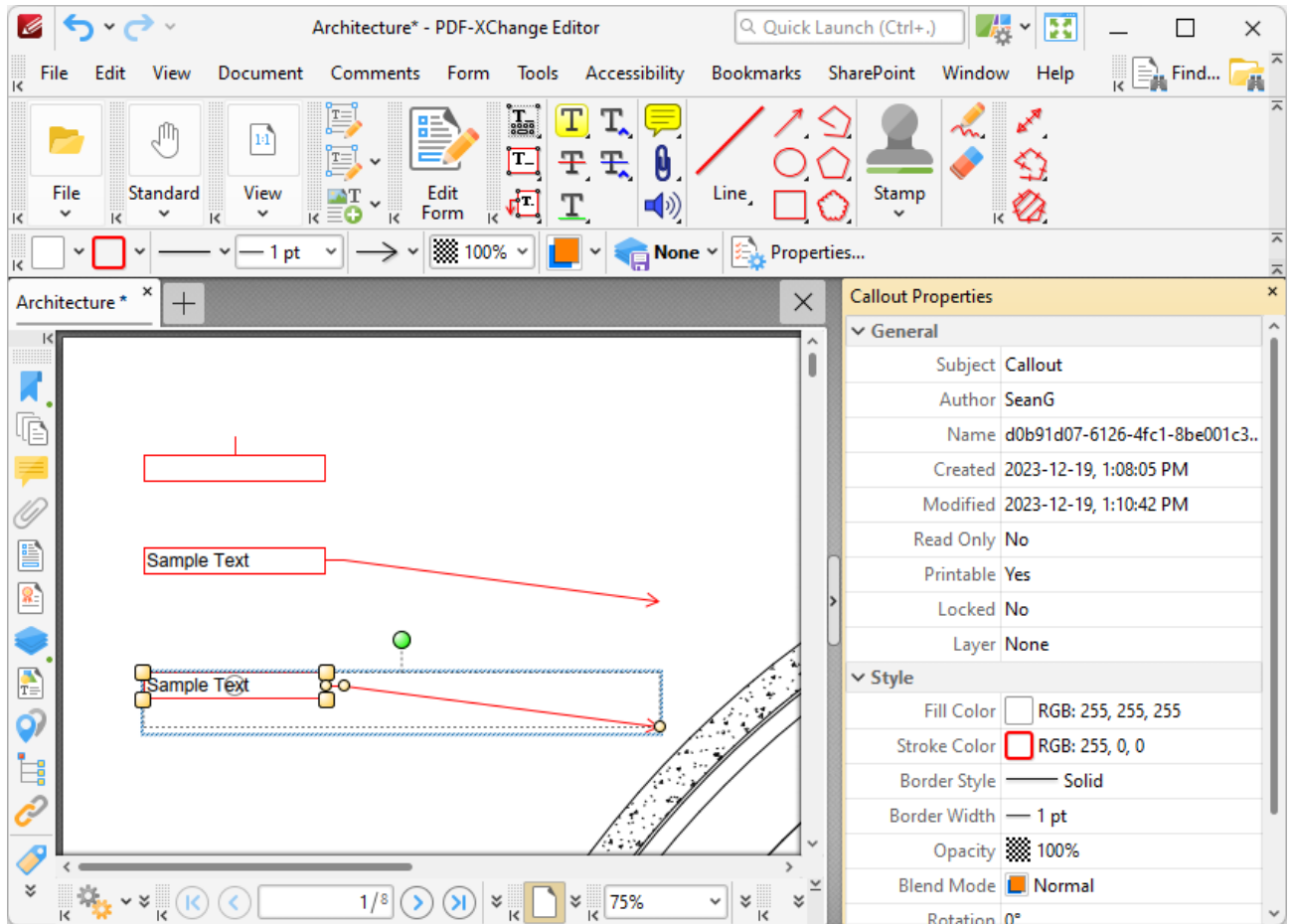
Figure 3. Callout Properties Pane

- **Subject** is the name of the callout comment, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the callout comment.
- **Name** is the unique name of the callout comment, as referenced within the application.
- **Created** is the date and time at which the callout comment was created.
- **Modified** is the date and time at which the callout annotation was last modified.
- **Read Only** is the read only status of the callout annotation. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the callout annotation. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.

- **Locked** is the locked status of the callout annotation. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** is the optional content layer to which the callout annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the callout annotation.
- **Stroke Color** determines the border color of the callout annotation.
- **Border Style** determines the border style of the callout annotation
- **Border Width** determines the border width of the callout annotation.
- **Opacity** determines the level of transparency in the callout annotation.
- **Blend Mode** determines how the callout annotation blends with overlapping content, as detailed **here.** [1107]
- **Rotation** determines the degrees of rotation of the callout annotation.
- **End** determines the line ending used for the arm of the callout annotation.
- **End Scale** determines the size of the line ending in relation to the rest of the callout annotation.

5.7.4.6 Highlight Text Tool

 Highlight Text Tool

Click **Highlight Text Tool** to add highlight annotations to document text:
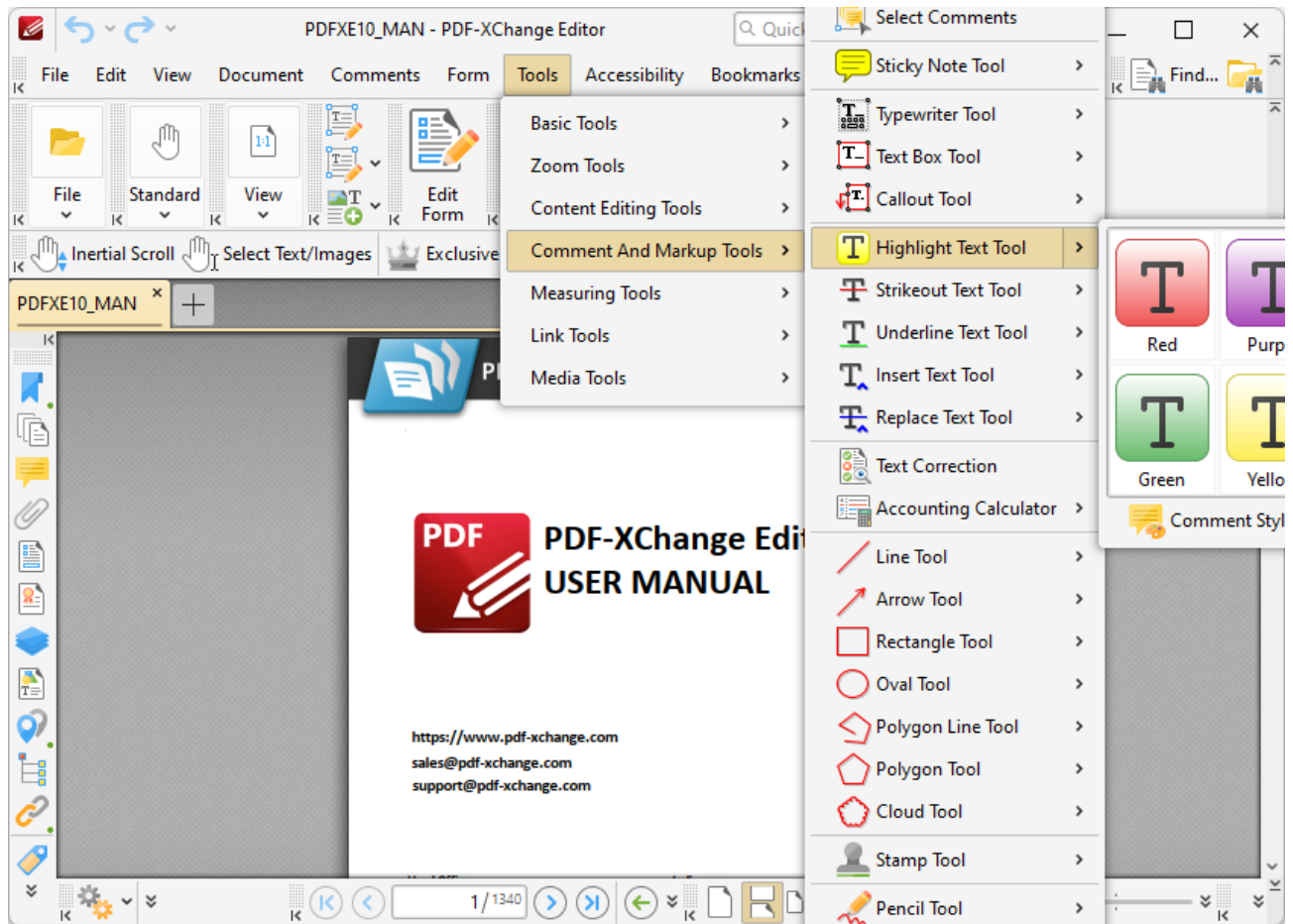
Figure 1. Tools Tab Submenu, Highlight Text Tool

When the **Highlight Text Tool** is selected, the pointer icon changes when it is hovered over text. Click and drag to highlight text:
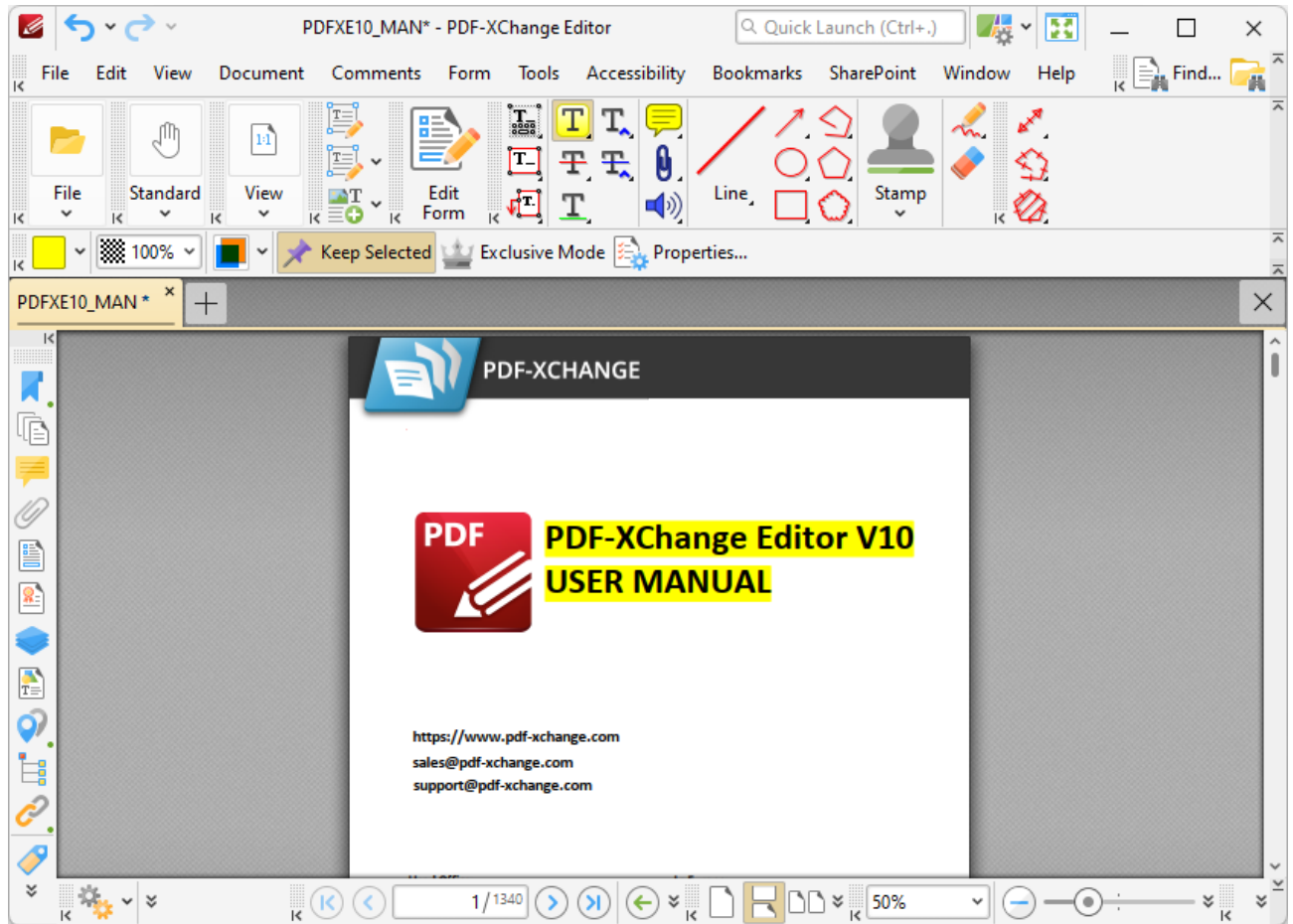
Figure 2. Highlight Text Tool Example

When the **Highlight Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

- **Fill Color** determines the highlight color.
- **Opacity** determines the level of transparency in the highlight.
- **Blend Mode** determines how highlights blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Highlight Text Tool** remains selected after a highlight has been created. If this option is enabled then the tool will remain selected and can be used to create several highlights consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a highlight markup.
- **Exclusive Mode** simplifies the process of using the **Highlight Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create highlights on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional highlight properties, as detailed below.

- Note that several default styles are available for highlights, as detailed in *(figure 1)*. Click to select alternative annotation styles. The **Comment Styles Palette** [791] can be used to save customized highlight styles for subsequent use. Right-click the **Highlight** icon in the **Comment Toolbar** [317] to view existing styles and/or access the **Comment Styles Palette.**

Highlight Properties Pane

Figure 3. Highlight Properties Pane

- **Subject** is the name of the highlight annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the highlight annotation.
- **Name** is the unique name of the highlight annotation, as referenced within the application.
- **Created** is the date and time at which the highlight annotation was created.
- **Modified** is the date and time at which the highlight annotation was last modified.
- **Read Only** is the read only status of the highlight annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the highlight annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.

- **Locked** is the locked status of the highlight annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the highlight annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the highlight annotation.
- **Opacity** determines the level of transparency in the highlight annotation.
- **Blend Mode** determines how highlight annotations blend with overlapping content. These options are explained **here.** 1107

Additionally, please note:

- Right-click highlighted text and select **Delete** to remove highlights. See **here** 1120 for an explanation of the other options in the right-click context menu.
- The **Highlight Text** tool cannot be used to highlight image-based text. Use the method detailed **here** for that purpose.
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

The **Comment Styles Palette** 791 can be used to save customized highlight styles for subsequent use. Right-click the **Highlight** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

5.7.4.7   **Strikeout Text Tool**

Strikeout Text Tool

Click **Strikeout Text Tool** to add strikeout annotations to document text:
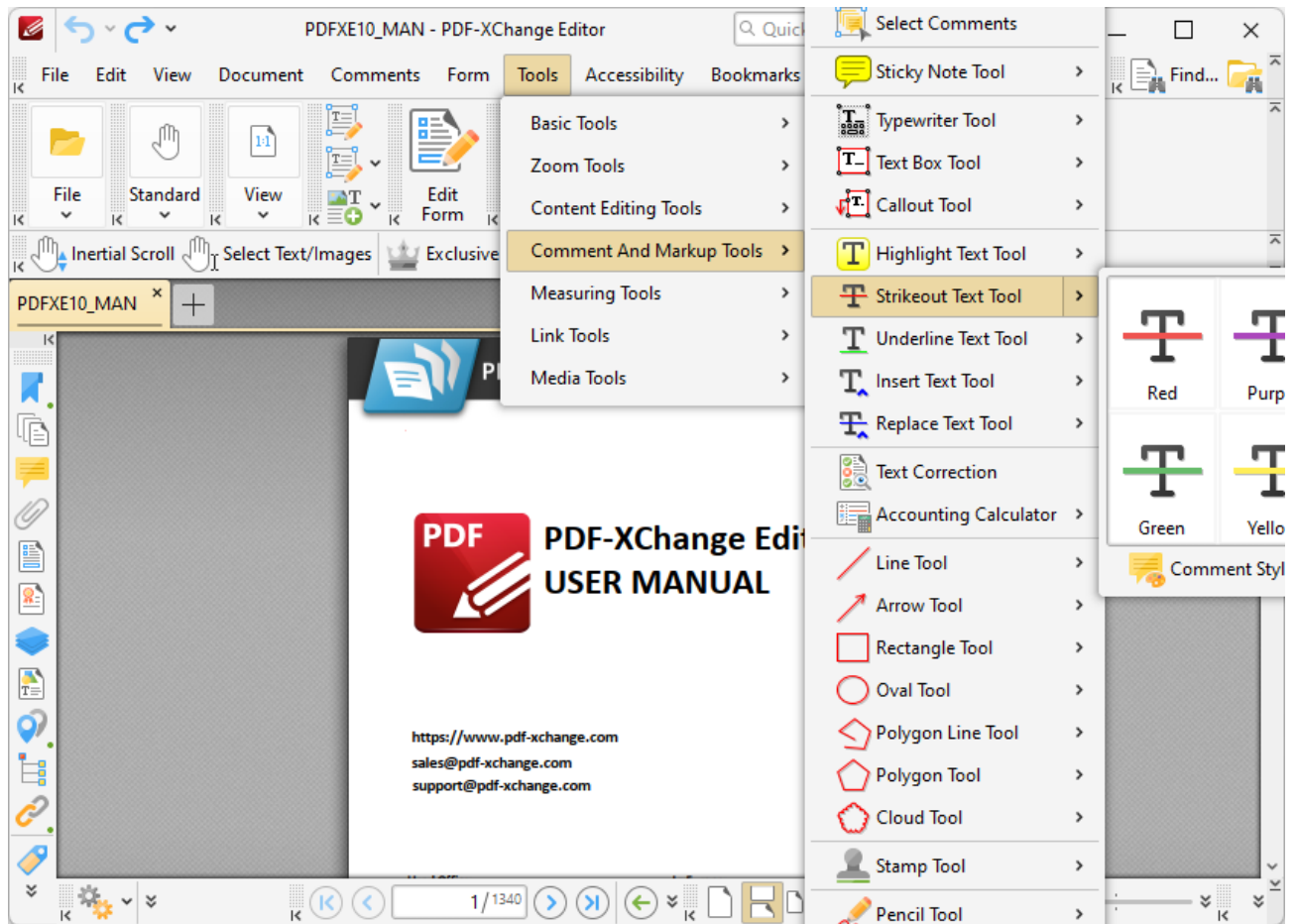
Figure 1. Tools Tab Submenu, Strikeout Text Tool

When the **Strikeout Text Tool** is selected, the pointer icon changes when it is hovered over text. Click and drag to strikeout text. Please note that it is not possible to strikeout image-based text. Struck-out text appears as below:
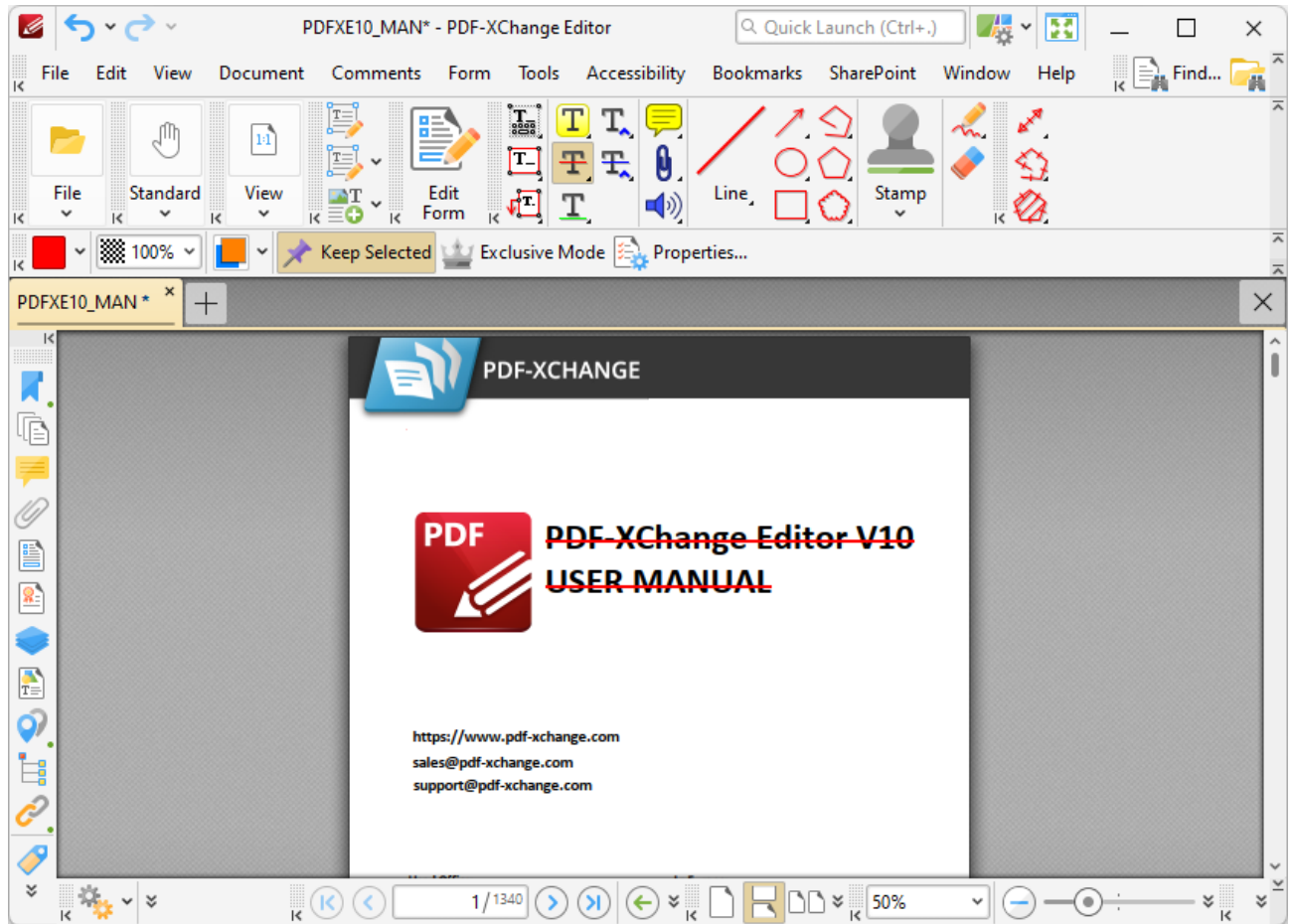
Figure 2. Strikeout Text Tool Example

When the **Strikeout Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

- **Fill Color** determines the strikeout color.
- **Opacity** determines the level of transparency in the strikeout.
- **Blend Mode** determines how strikeouts blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Strikeout Text Tool** remains selected after a strikeout has been created. If this option is enabled then the tool will remain selected and can be used to create several strikeouts consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a strikeout markup.
- **Exclusive Mode** simplifies the process of using the **Strikeout Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create strikeouts on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view additional strikeout properties, as detailed below.

- The **Commenting**₂₅₀ section of the **Preferences**₂₂₈ dialog box can be used to view/edit preferences for comments.
- Note that several default styles are available for strikeouts, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette**₇₉₁ can be used to save customized strikeout styles for subsequent use. Right-click the **Strikeout** icon in the **Comment Toolbar**₃₁₇ to view existing styles and/or access the **Comment Styles Palette.**
- Right-click struck-out text and select **Delete** to remove strikeout lines. See **here**₁₁₂₀ for an explanation of the other options in the right-click shortcut menu.

Strikeout Properties Pane
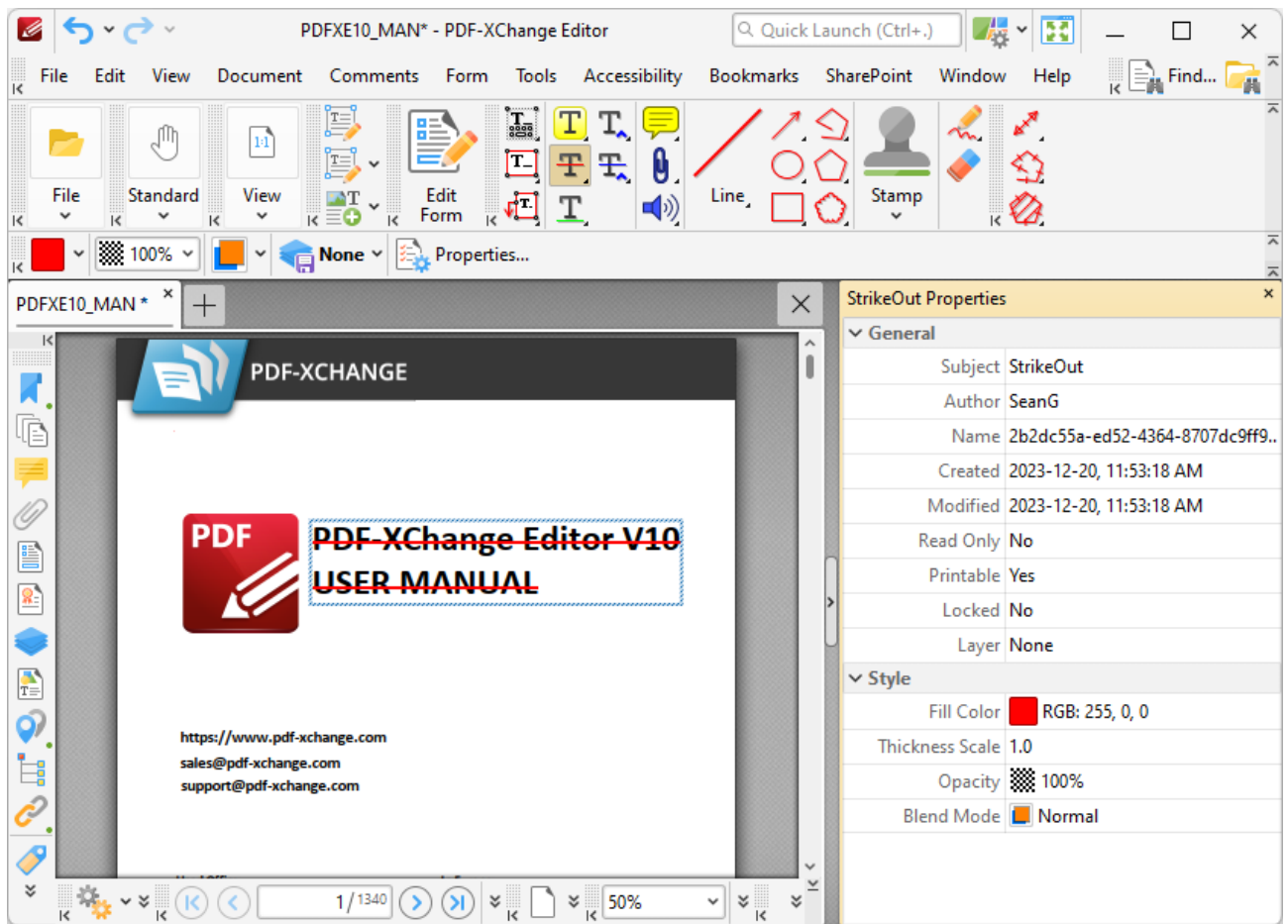
Figure 3. Strikeout Properties Pane

- **Subject** is the name of the strikeout annotation, as referenced in the **Comments**₅₁₉ pane.
- **Author** is the name of the user that created the strikeout annotation.
- **Name** is the unique name of the strikeout annotation, as referenced within the application.
- **Created** is the date and time at which the strikeout annotation was created.
- **Modified** is the date and time at which the strikeout annotation was last modified.

- **Read Only** is the read only status of the strikeout annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the strikeout annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the strikeout annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the strikeout annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the strikeout annotation.
- **Thickness Scale** determines the thickness of the strikeout annotation.
- **Opacity** determines the level of transparency in the strikeout annotation.
- **Blend Mode** determines how strikeout annotations blend with overlapping content. These options are explained **here.** 1107

The **Comment Styles Palette** 791 can be used to save customized strikeout styles for subsequent use. Right-click the **Strikeout** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

5.7.4.8 Underline Text Tool

Underline Text Tool

Click **Underline Text Tool** to add underline annotations to document text:
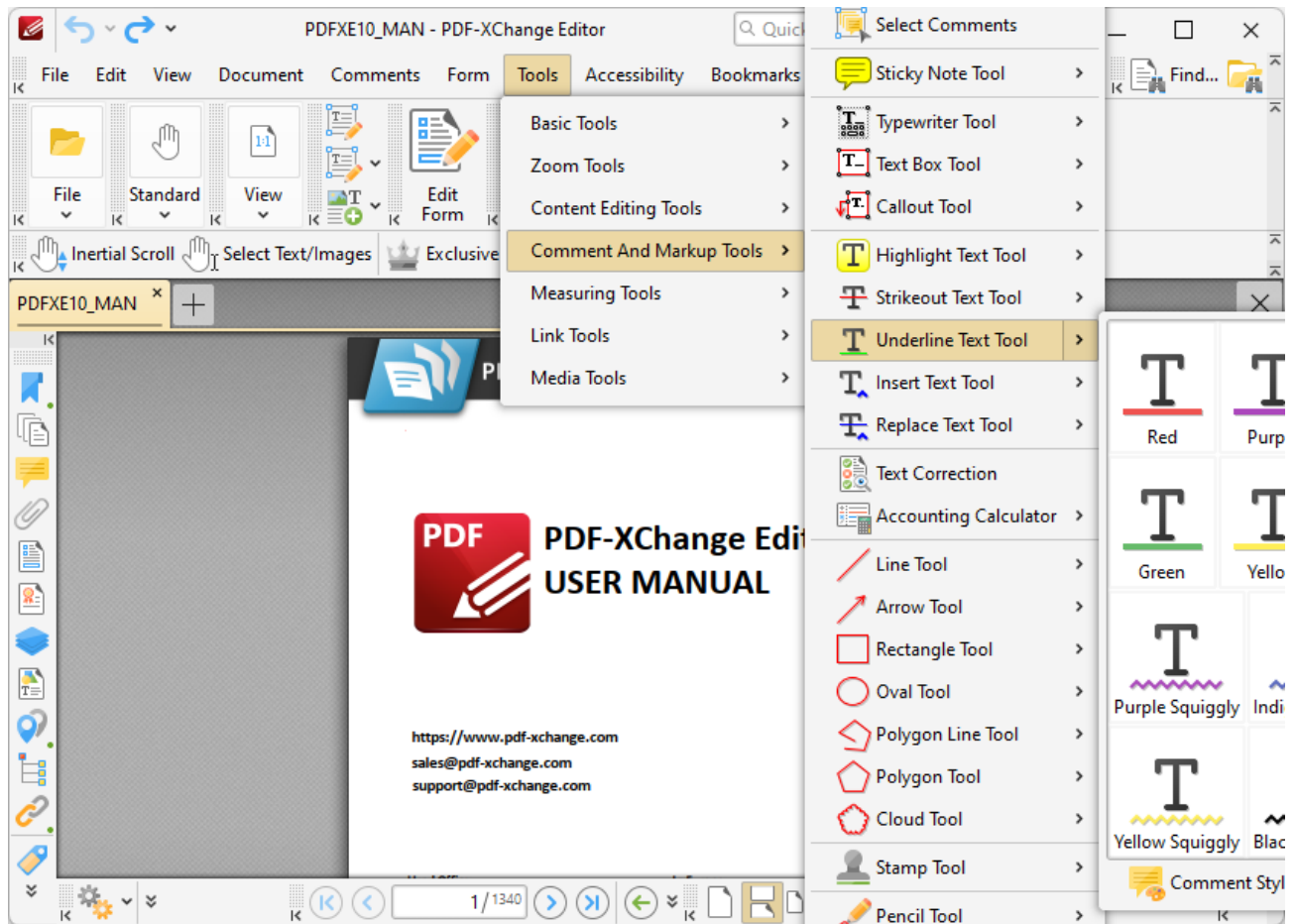
Figure 1. Tools Tab Submenu, Underline Text Tool

When the **Underline Text Tool** is selected, the pointer icon changes when it is hovered over text. Click and drag to underline text. Please note that it is not possible to underline image-based text. Underlined text appears as below:
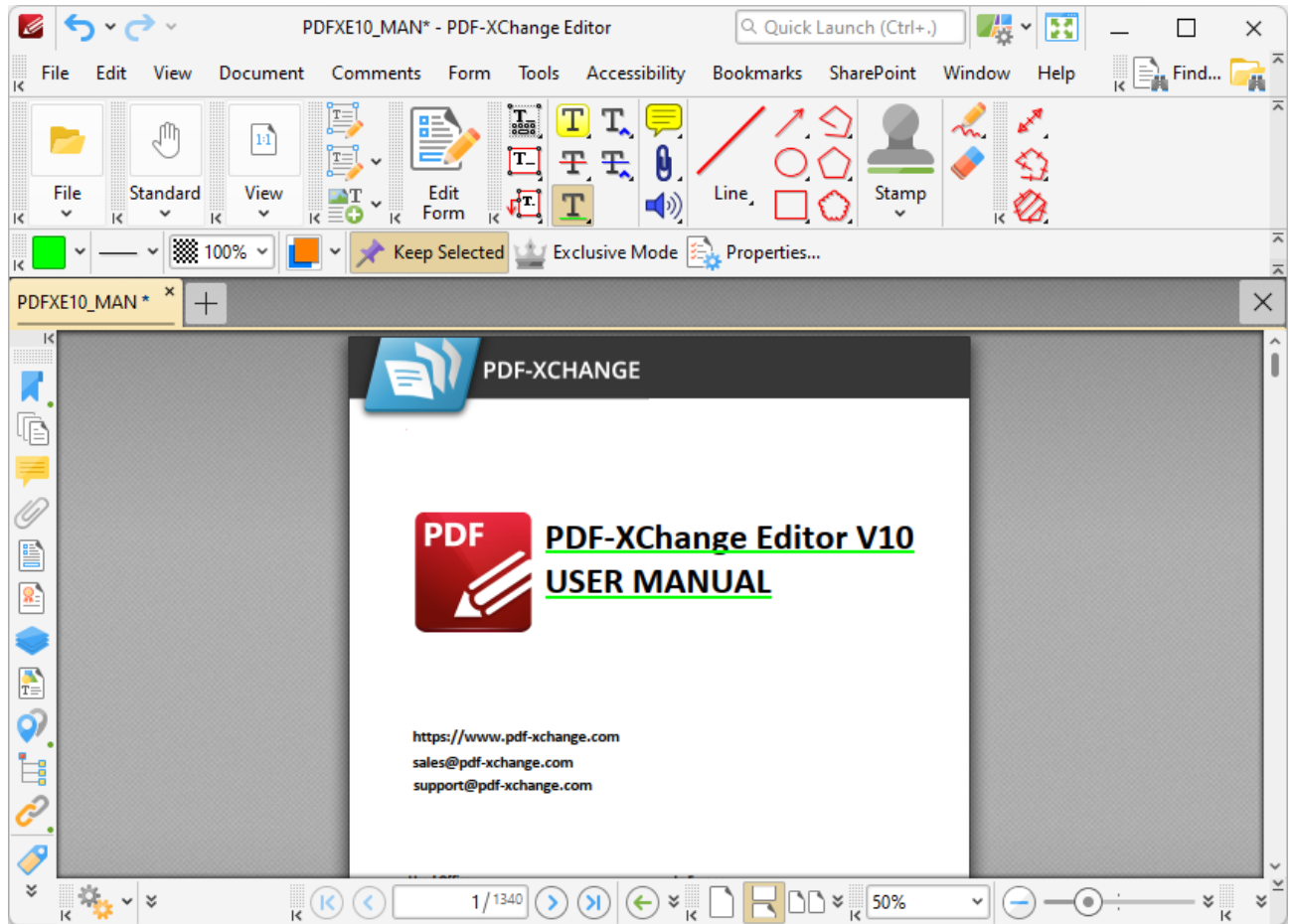
Figure 2. Underline Text Tool Example

When the **Underline Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

- **Fill Color** determines the underline color.
- **Underline Style** determines the style of the underline.
- **Opacity** determines the level of transparency in the underline.
- **Blend Mode** determines how underlines blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Underline Text Tool** remains selected after an underline has been created. If this option is enabled then the tool will remain selected and can be used to create several underlines consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating an underline markup.
- **Exclusive Mode** simplifies the process of using the **Underline Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create underlines on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.

- Click **Properties** to view/edit additional underline properties, as detailed below.
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.
- Note that several default styles are available for underlines, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized underline styles for subsequent use. Right-click the **Underline** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- Right-click underlined text and select **Delete** to remove underlines. See **here** 1120 for an explanation of the other options in the right-click shortcut menu.

Underline Properties
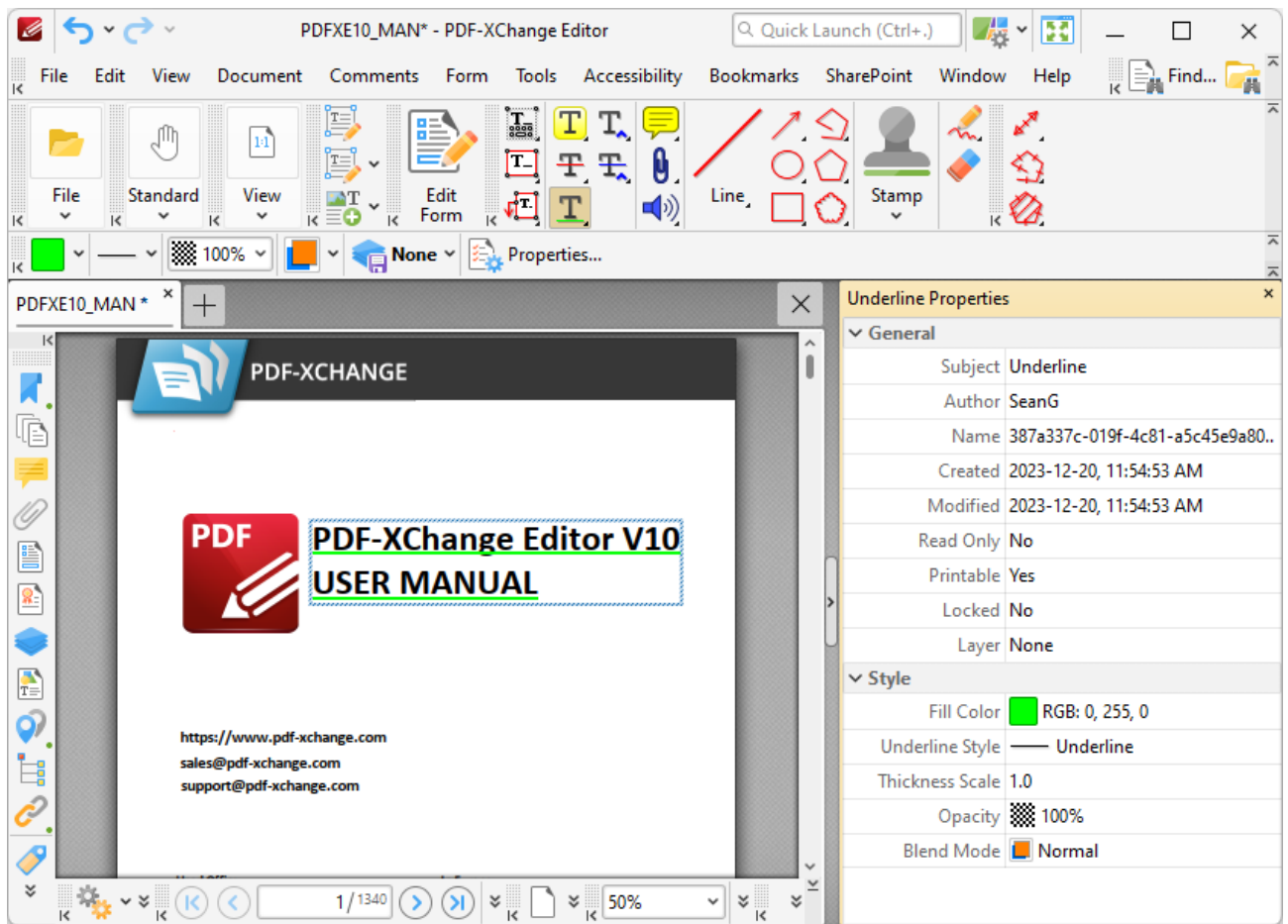
Figure 3. Underline Properties Pane

- **Subject** is the name of the underline annotation, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the underline annotation.
- **Name** is the unique name of the underline annotation, as referenced within the application.
- **Created** is the date and time at which the underline annotation was created.
- **Modified** is the date and time at which the underline annotation was last modified.

- **Read Only** is the read only status of the underline annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the underline annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the underline annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the underline annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the underline annotation.
- **Underline Style** determines the style used for the underline annotation.
- **Thickness Scale** determines the thickness of the underline annotation.
- **Opacity** determines the level of transparency in the underline annotation.
- **Blend Mode** determines how underline annotations blend with overlapping content. These options are explained **here.** 1107

The **Comment Styles Palette** 791 can be used to save customized underline styles for subsequent use. Right-click the **Underline** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

5.7.4.9   Insert Text Tool

Insert Text Tool

The **Insert Text** tool is used when editing documents that contain text. The tool inserts caret annotations that contain pop-up notes. The creator of the annotation can add their suggestions to the pop-up note for text that should be inserted at the location of the caret annotation. Subsequent users of the document can double-click the caret annotation in order to view its pop-up note and the suggested changes that it contains.

Click **Insert Text Tool** to use this tool:
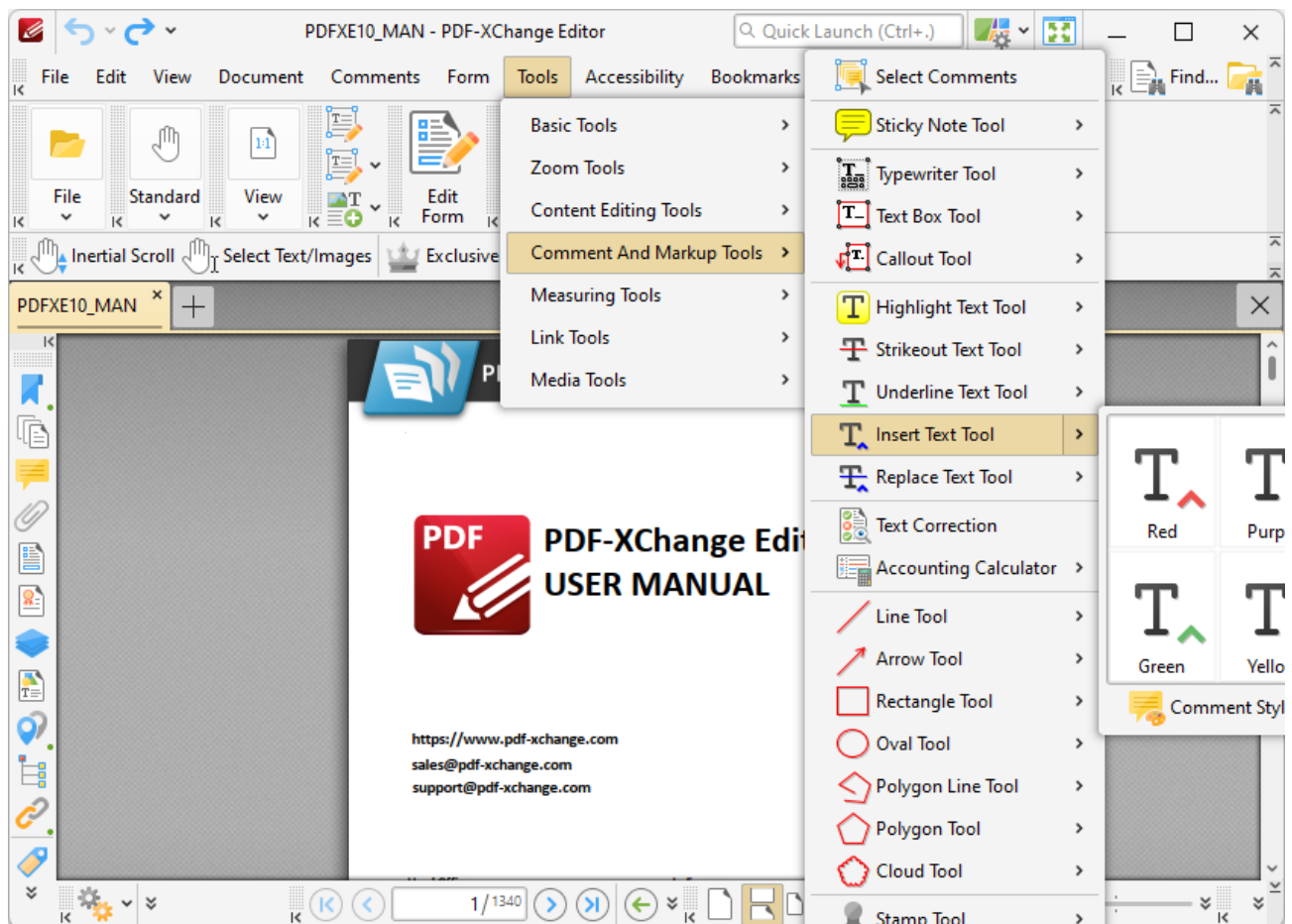
Figure 1. Tools Tab Submenu, Insert Text Tool

When the **Insert Text Tool** is enabled, click and drag over the text that you want to annotate:
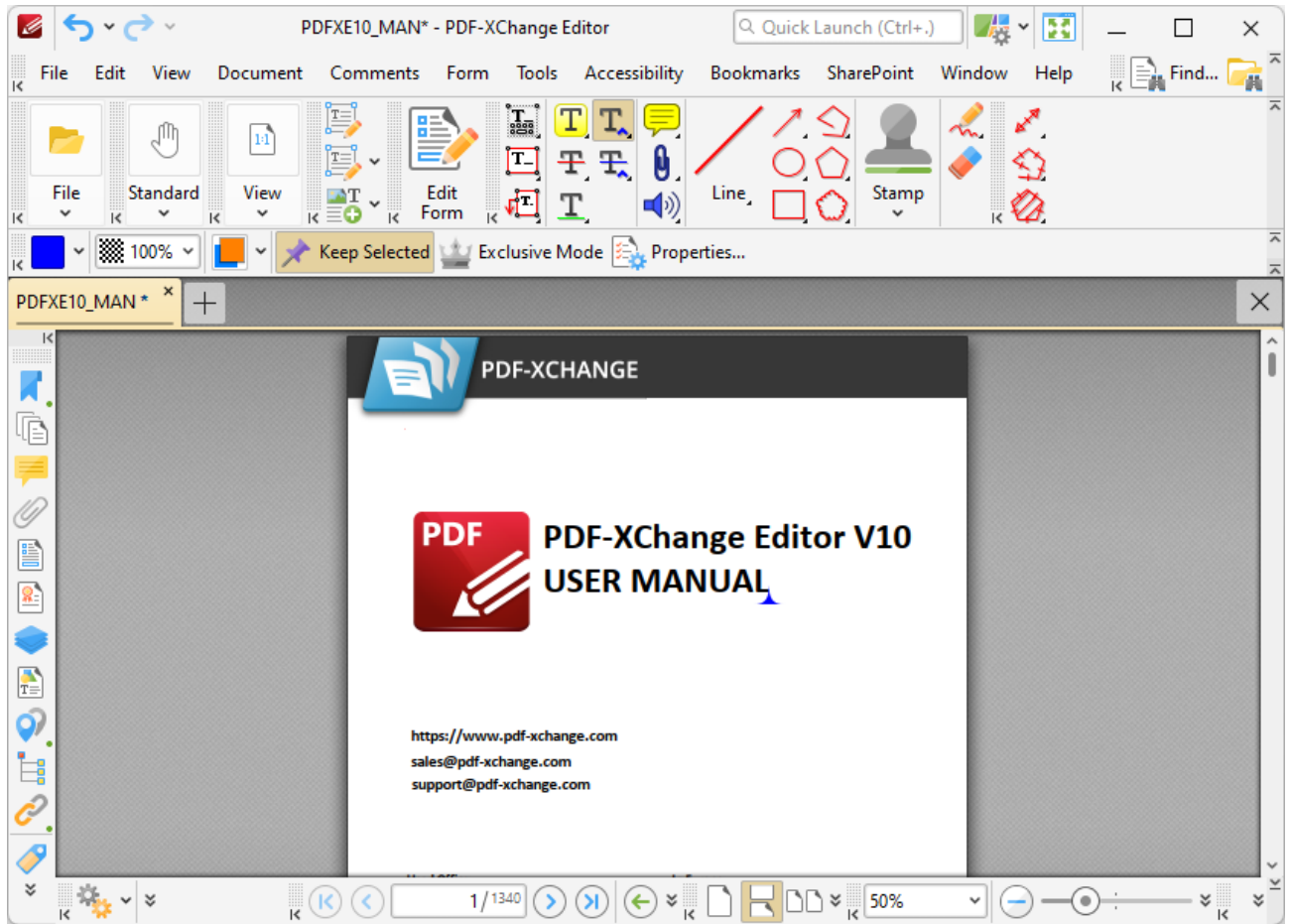
Figure 2. Insert Text Tool Active

When you release the mouse button, a caret annotation will be added on the right side of the selected text. Double click the annotation to open its pop-up note, then enter the desired text:
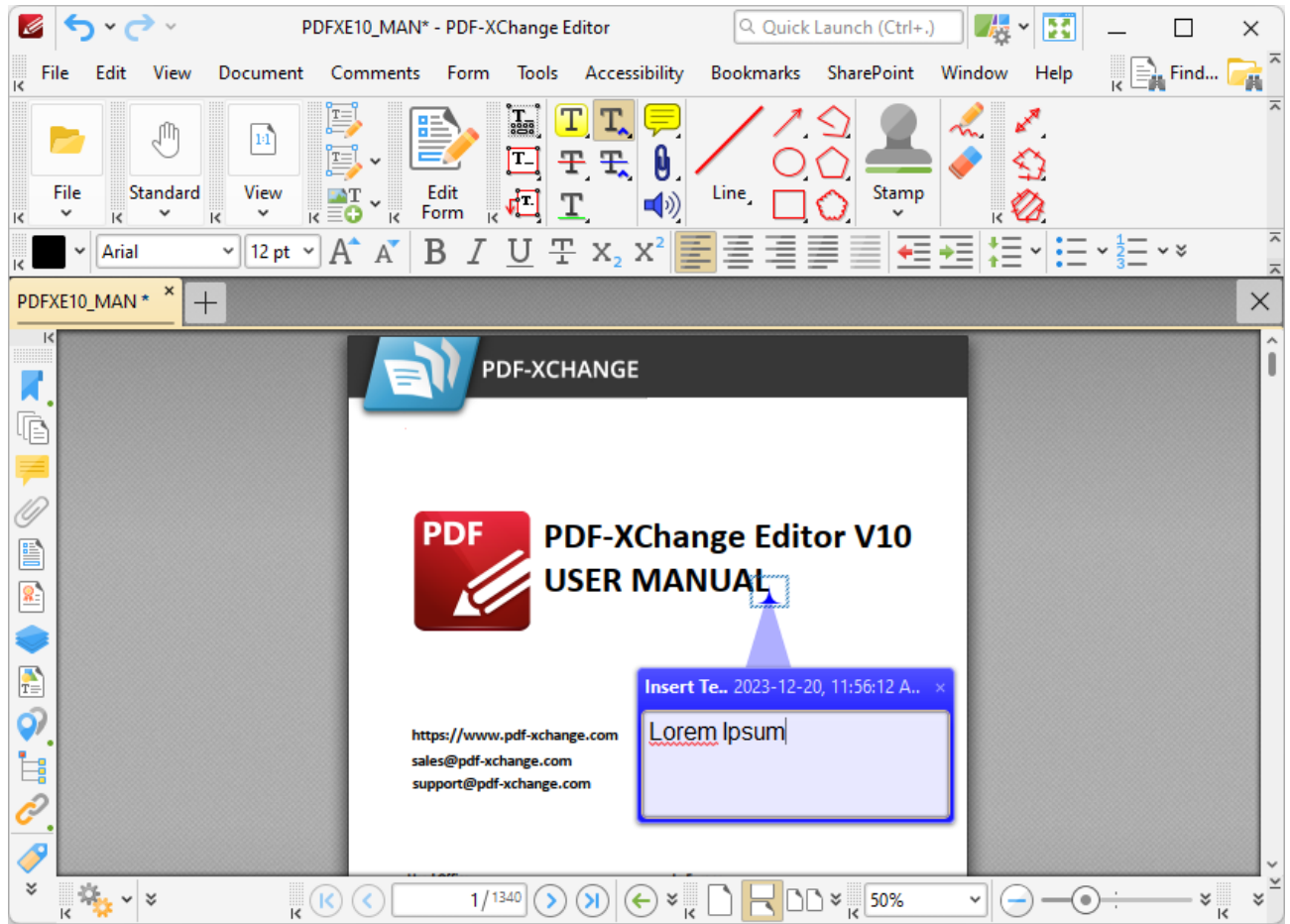
Figure 3. Insert Text Pop-up Note Expanded and Edited

Press Ctrl+' to open the **Properties** pane for selected annotations and view/edit properties:
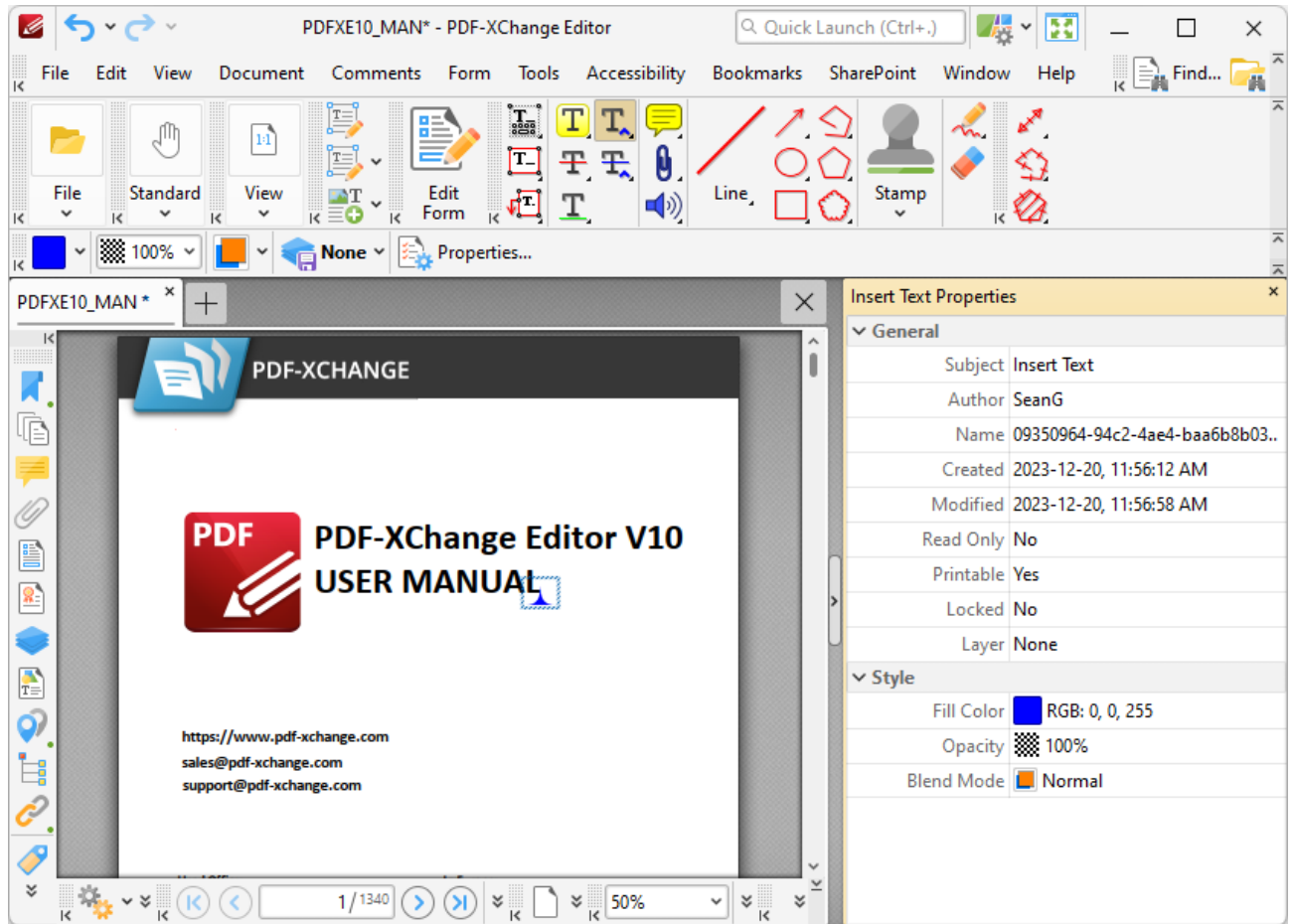
Figure 3. Insert Text Tool, Insert Text Properties Pane

- **Subject** is the name of the caret annotation, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the caret annotation.
- **Name** is the unique name of the caret annotation, as referenced within the application.
- **Created** is the date and time at which the caret annotation was created.
- **Modified** is the date and time at which the caret annotation was last modified.
- **Read Only** is the read only status of the caret annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the caret annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the caret annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the caret annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the caret annotation.
- **Opacity** determines the level of transparency in the caret annotation.

- **Blend Mode** determines how caret annotations blend with overlapping content. These options are explained **here.** 1107

When the **Insert Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

- **Fill Color** determines the color of the caret annotation.
- **Opacity** determines the level of transparency in the caret annotation.
- **Blend Mode** determines how annotations blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Insert Text Tool** remains selected after a caret annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a caret annotation.
- **Exclusive Mode** simplifies the process of using the **Insert Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create annotations on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional **Insert Text Tool** properties, as detailed above.
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.
- Note that several default styles are available for annotations, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized annotation styles for subsequent use. Right-click the **Insert Text Tool** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

Right-click annotations and select **Delete** to remove them. See **here** 1120 for an explanation of the other options in the right-click shortcut menu.

The **Comment Styles Palette** 791 can be used to save customized annotation styles for subsequent use. Right-click the **Insert Text** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

5.7.4.10 **Replace Text Tool**

Replace Text Tool

The **Replace Text** tool is used when editing documents that contain text. The tool inserts caret annotations that contain pop-up notes. The creator of the annotation can add their suggestions to the pop-up note for text that should be inserted to replace existing text at the location of the caret annotation. A strikeout is added to the existing text in order to indicate that it should be removed. Subsequent users of the document can double-click the annotation in order to view its pop-up note and the suggested changes that it contains.

Click **Replace Text Tool** to use this tool:
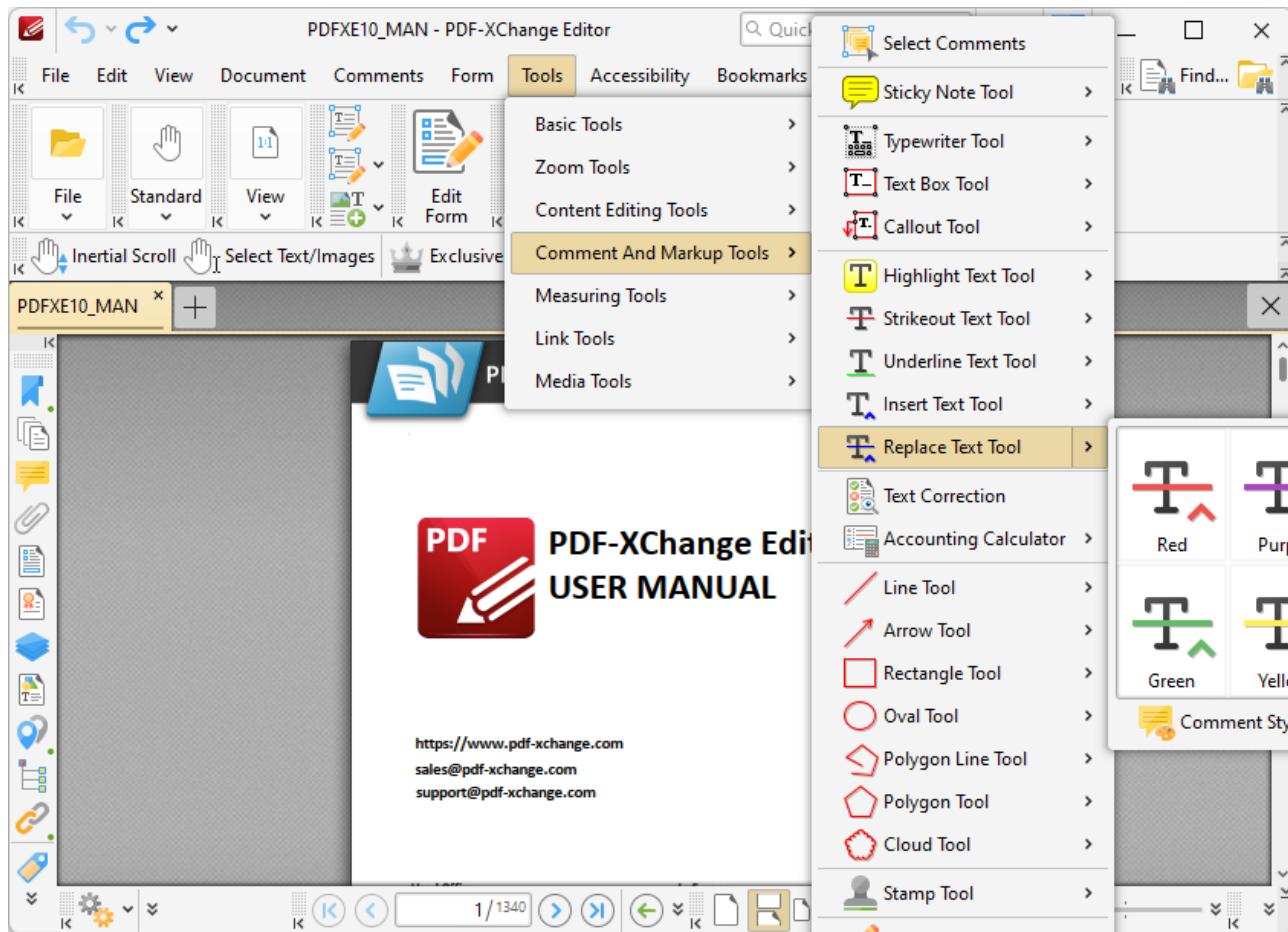
Figure 1. Tools Tab Submenu, Replace Text Tool

When the **Replace Text Tool** is enabled, click and drag over the text that you want to annotate:
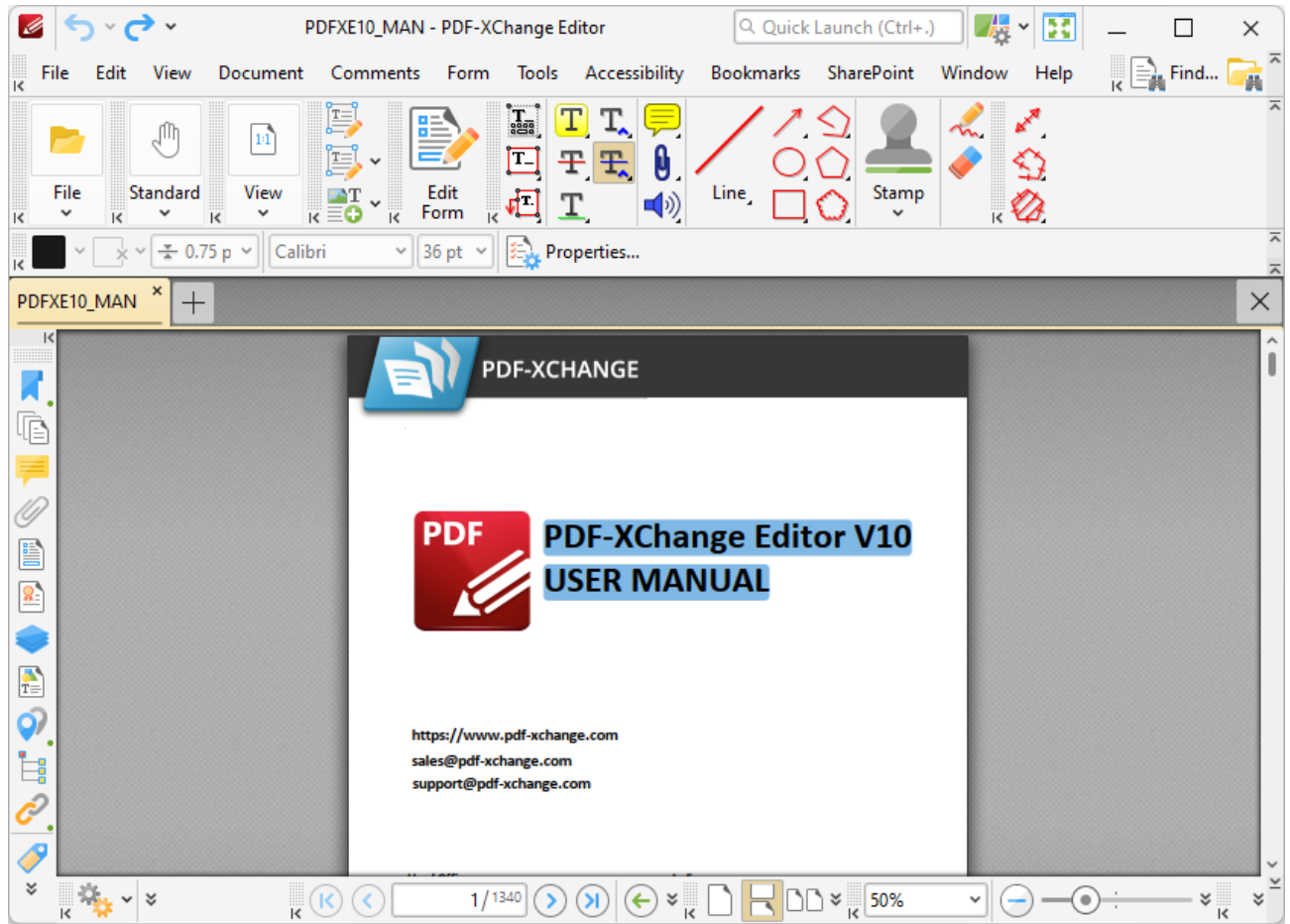
Figure 2. Replace Text Tool Active

When you release the mouse button, a strikeout annotation will be added to the text and a caret annotation will be added on the right side of it. Double click the annotation to open its pop-up note, then enter the desired text:
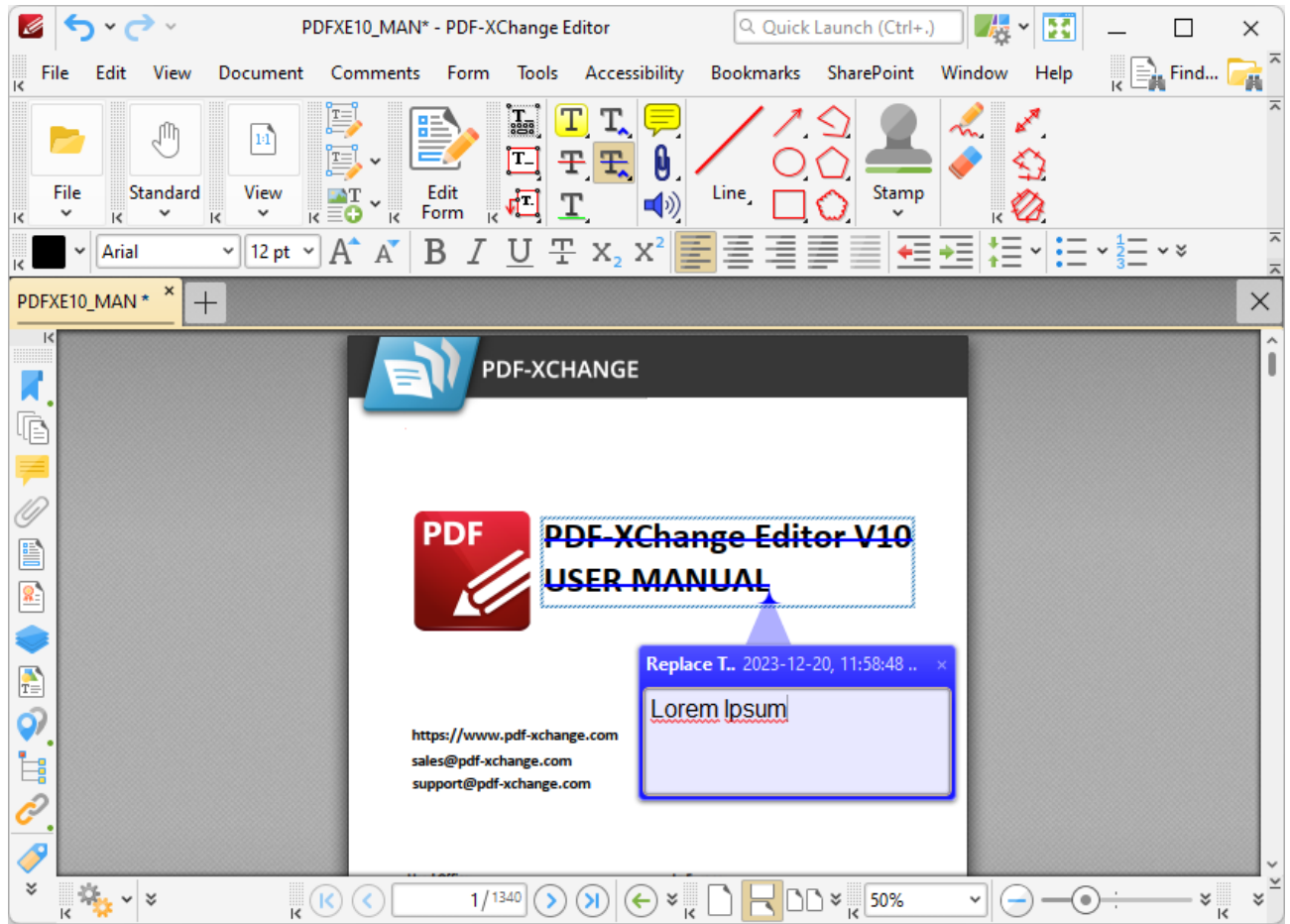
Figure 3. Replace Text Pop-up Note Expanded and Edited

Press Ctrl+' to open the **Properties** pane for selected annotations and view/edit properties:
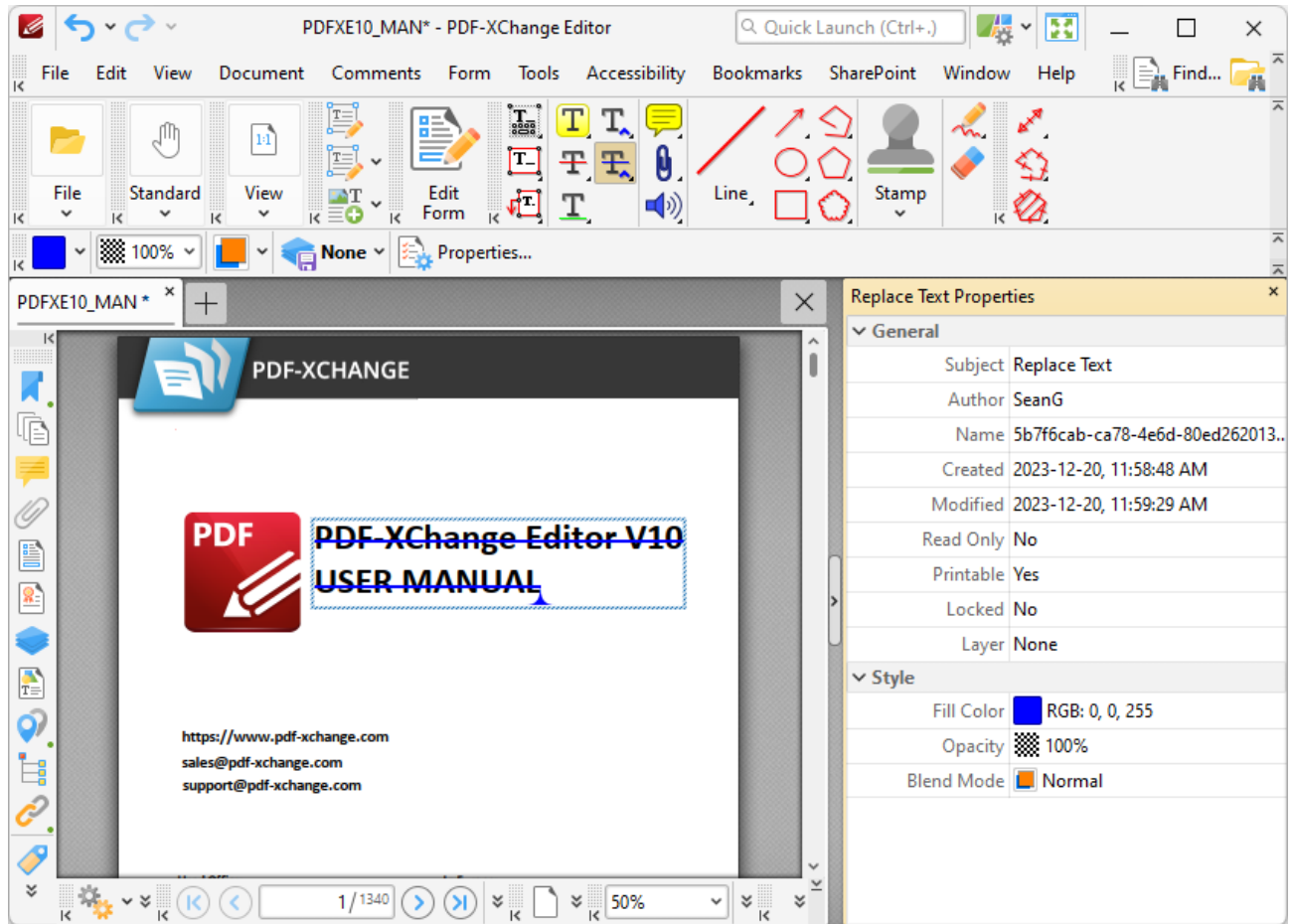
Figure 3. Replace Text Tool, Replace Text Properties Pane
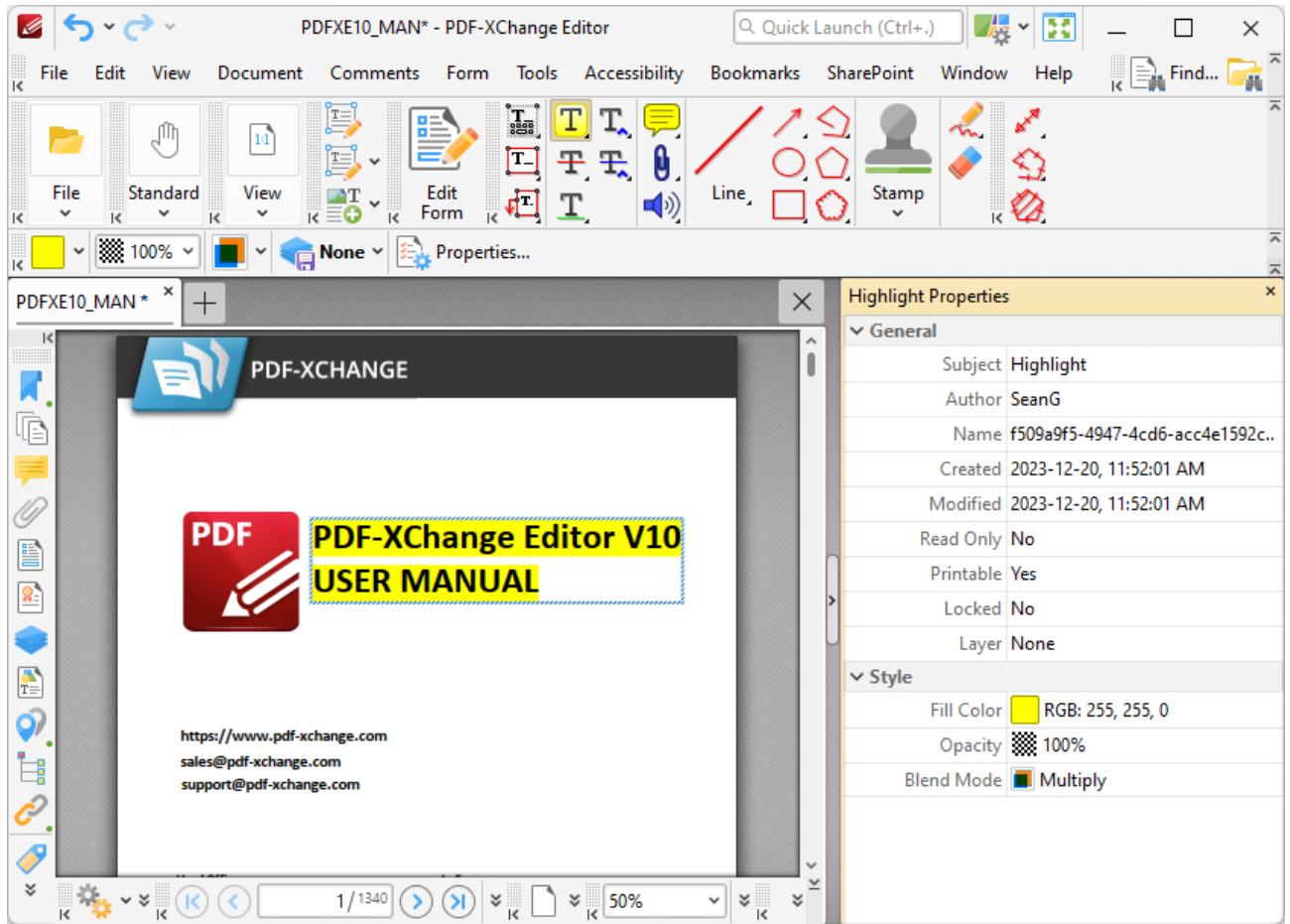
- **Subject** is the name of the annotation, as referenced in the **Comments** ₅₁₉ pane.
- **Author** is the name of the user that created the annotation.
- **Name** is the unique name of the annotation, as referenced within the application.
- **Created** is the date and time at which the annotation was created.
- **Modified** is the date and time at which the annotation was last modified.
- **Read Only** is the read only status of the annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the annotation belongs. Further information about layers is available **here.** ₅₃₅
- **Fill Color** determines the color of the annotation.
- **Opacity** determines the level of transparency in the annotation.

- **Blend Mode** determines how annotations blend with overlapping content. These options are explained **here.** ₁₁₀₇

When the **Replace Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** ₄₈₅

- **Fill Color** determines the color of the annotation.
- **Opacity** determines the level of transparency in the annotation.
- **Blend Mode** determines how annotations blend with underlying content. These options are explained **here.** ₁₁₀₇
- **Keep Selected** determines whether or not the **Replace Text Tool** remains selected after an annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating one annotation.
- **Exclusive Mode** simplifies the process of using the **Replace Text Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create annotations on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional **Replace Text Tool** properties pane, as detailed above.
- The **Commenting** ₂₅₀ section of the **Preferences** ₂₂₈ dialog box can be used to view/edit preferences for comments.
- Note that several default styles are available for annotations, as detailed in *(figure 1)*. Click to select alternative annotation styles. The **Comment Styles Palette** ₇₉₁ can be used to save customized annotation styles for subsequent use. Right-click the **Replace Text Tool** icon in the **Comment Toolbar** ₃₁₇ to view existing styles and/or access the **Comment Styles Palette.**

Right-click annotations and select **Delete** to remove them. See **here** ₁₁₂₀ for an explanation of the other options in the right-click context menu.

The **Comment Styles Palette** ₇₉₁ can be used to save customized annotation styles for subsequent use. Right-click the **Replace Text** icon in the **Comment Toolbar** ₃₁₇ to view existing styles and/or access the **Comment Styles Palette.**

5.7.4.11 Text Correction Tool

Text Correction Tool

The **Text Correction Text** tool is used when editing documents that contain text. It inserts annotations that indicate text should be removed from documents or replaced with different text. Click **Text Correction Tool** to use this tool:
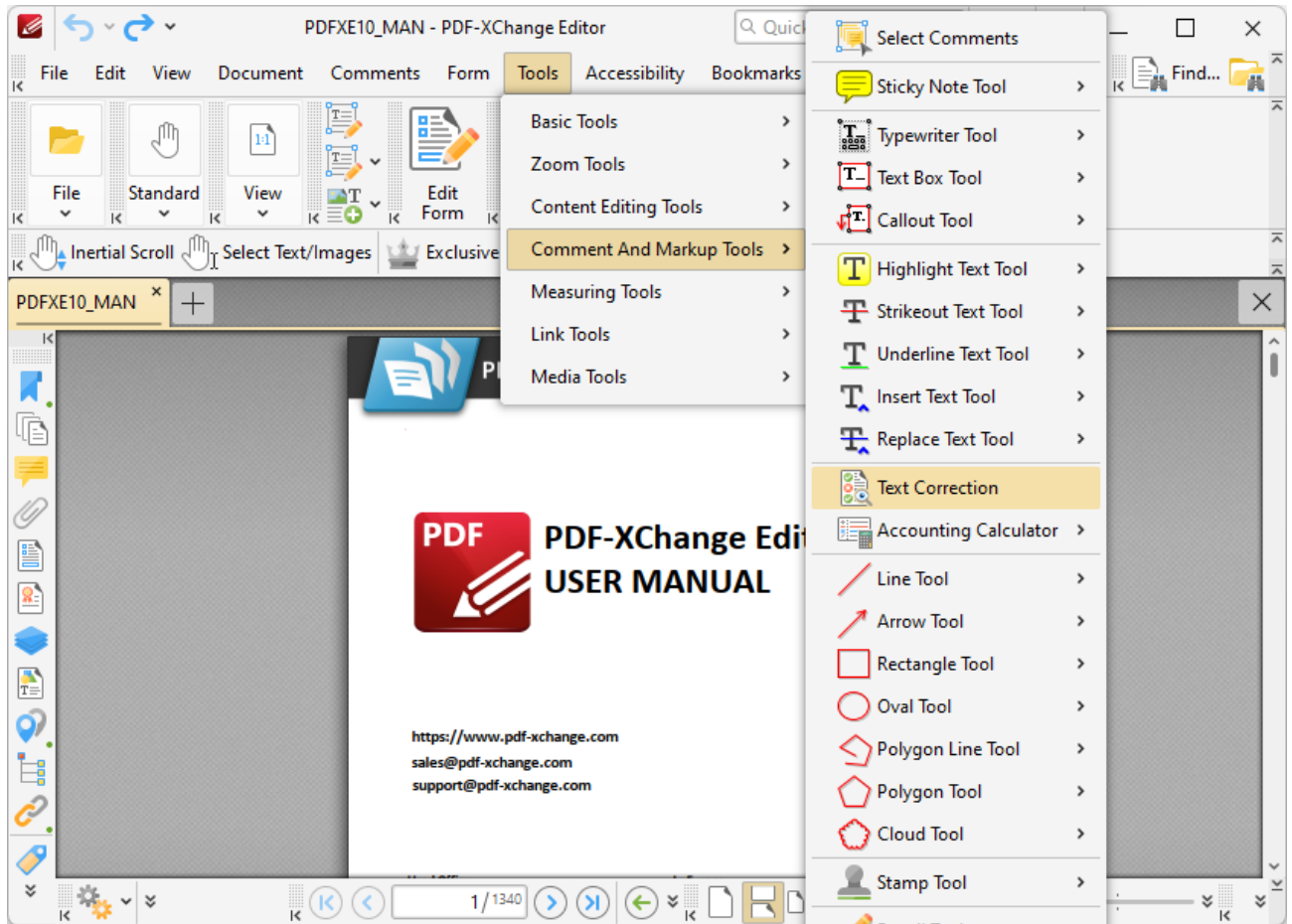
Figure 1. Tools Tab Submenu, Text Correction Tool

When the **Text Correction Tool** is enabled, click and drag over the text that you want to annotate:
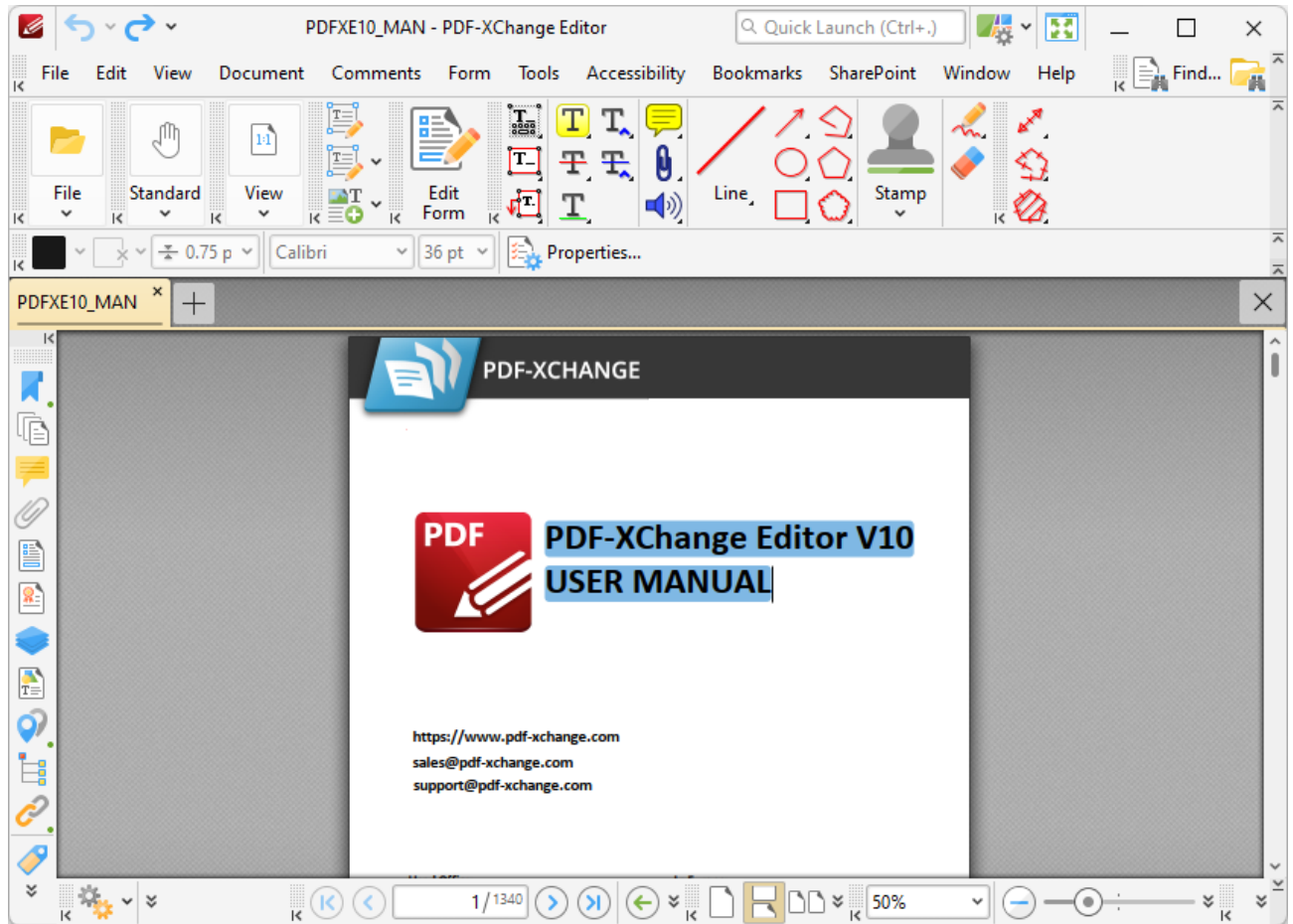
Figure 2. Text Correction Tool Active

Selected text can be edited as follows:

- Press **Delete** to add a strikeout annotation to selected text. Strikeout annotations indicate that text should be deleted and can be edited as detailed **here.** 873
- Press **Insert** to add a caret annotation to selected text. Caret annotations indicate that text should be replaced and can be edited as detailed **here.** 886
- Press **Ctrl+V** to add a caret annotation to selected text, as with the **Insert** option, and paste the content of the clipboard in the annotation's pop-up note.
- Use the keyboard to enter text. A caret annotation will be added to selected text, as with the **Insert** option, and the text entered will be added to the annotation's pop-up note.
- Press **Insert** when the **Text Correction Tool** is enabled, but no text is selected, to add caret annotations at the location of the pointer. Caret annotations indicate that text should be replaced and can be edited as detailed **here.** 886

5.7.4.12 Accounting Calculator

Accounting Calculator

The **Accounting Calculator** tool is used to perform accounting calculations and create accounting lists that can be added to documents. Click **Accounting Calculator** to use this tool:
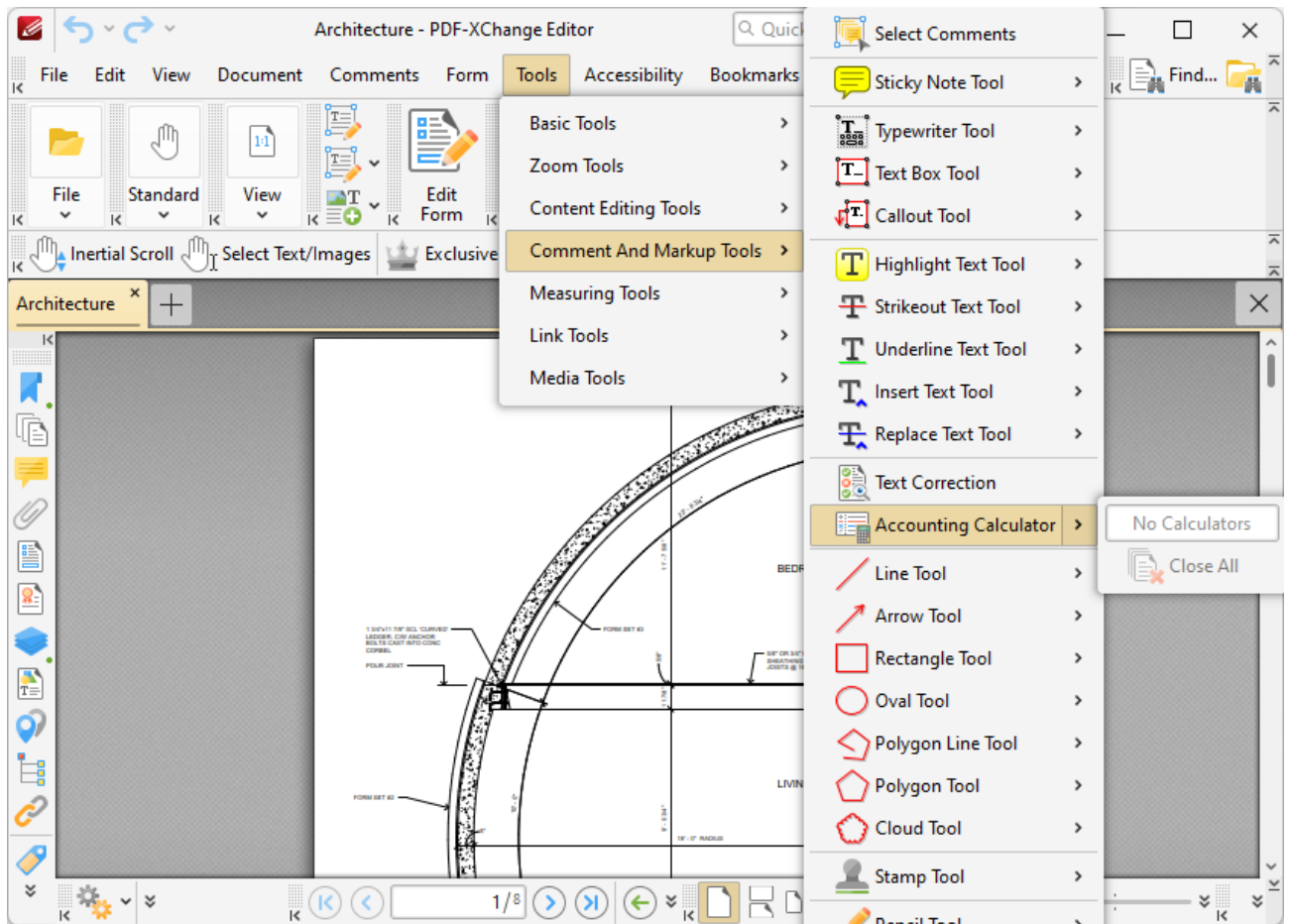
Figure 1. Comment Tab, Accounting Calculator

The **Accounting Calculator** dialog box will open:
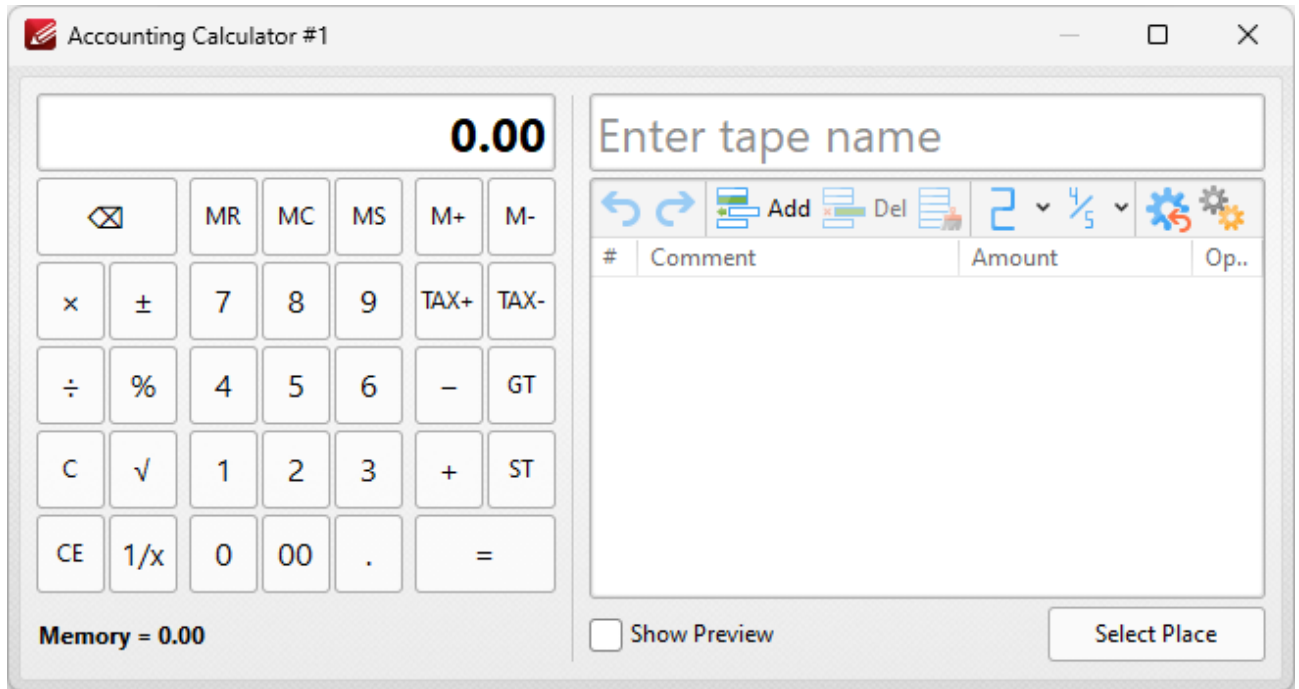
Figure 2. Accounting Calculator Dialog Box

Use the keys to perform calculations as desired. The operations you perform will be detailed in the pane on the right side:
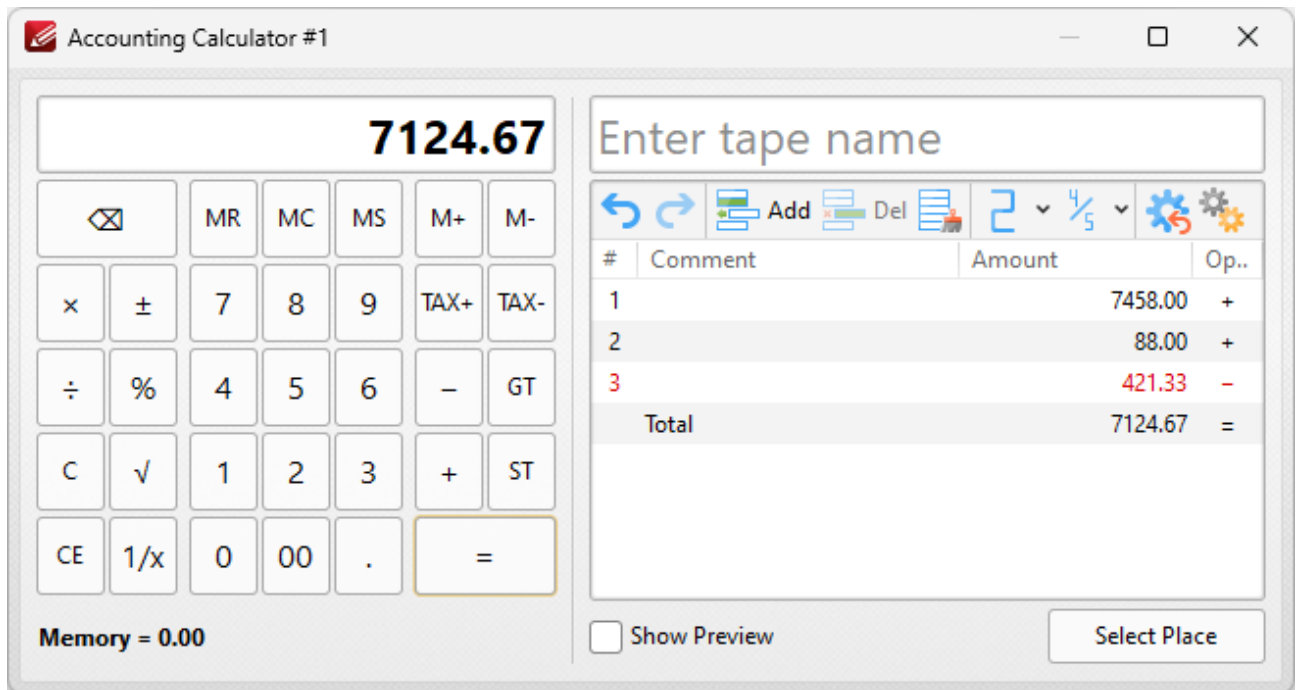
Figure 3. Accounting Calculator in Operation

You can use the controls in the pane as follows:

- Enter a name in the **Tape Name** text box to specify a name for the output tape used when the accounting list is added to the document.
- Click **Undo/Redo** to undo/redo calculation operations.
- Click **Add** to add a new calculation line in the calculation pane.
- Click **Delete** to delete selected calculation lines.
- Click **Clear** to clear all calculations from the calculation pane.
- Use the **Decimal Places** dropdown menu to determine how many decimal places the calculator uses.
- Use the **Rounding Mode** dropdown menu to determine how numbers are rounded.
- Click **Reset List** to reset all list settings to their default values.
- Click **Show Preview** to preview how the calculation tape will look when it is added to the document.
- Click **Settings** to open the **Settings** dialog box for the calculator:
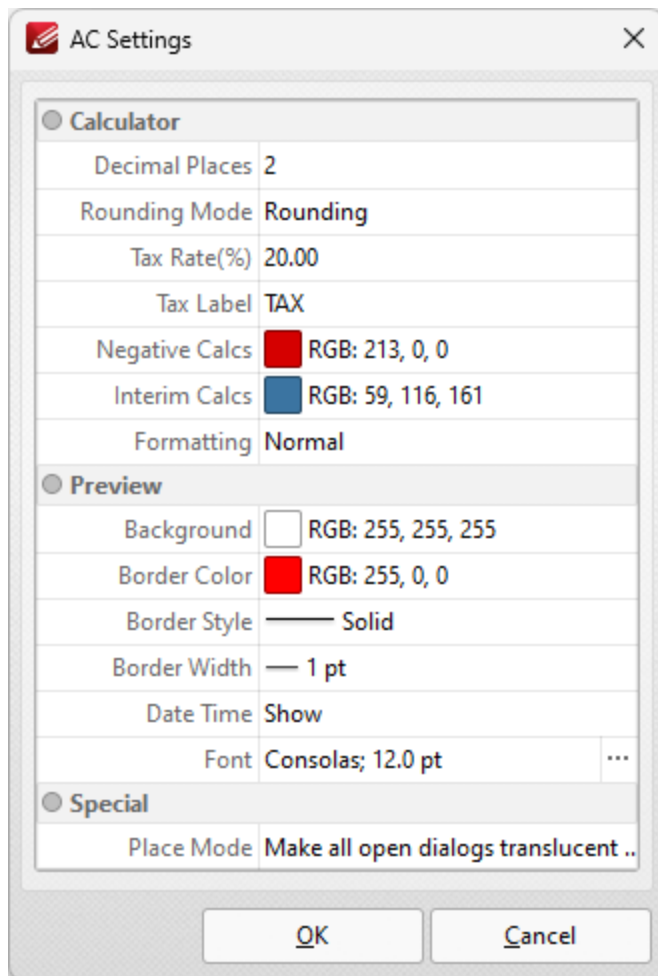
Figure 4. AC Settings Dialog Box

You can use the dropdown menus and text boxes to update the settings used for the calculator as desired.

When you have added all desired information to the calculator pane, click **Select Place** in the **Accounting Calculator** dialog box to specify where you want the tape to be located in the document. A preview of the accounting list will be displayed beneath the pointer:
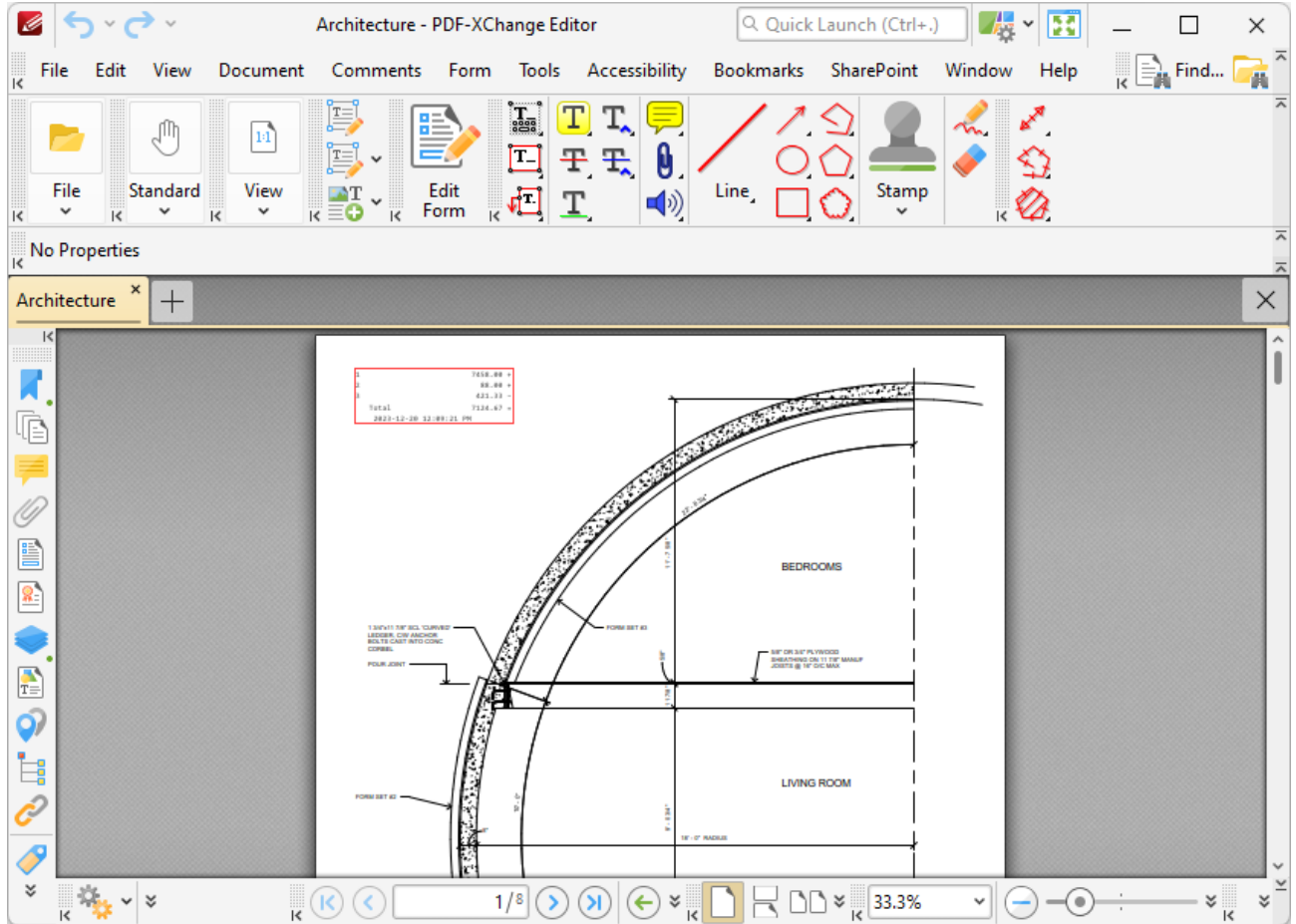
Figure 5. Accounting List Preview

Click to add the accounting list to the document:
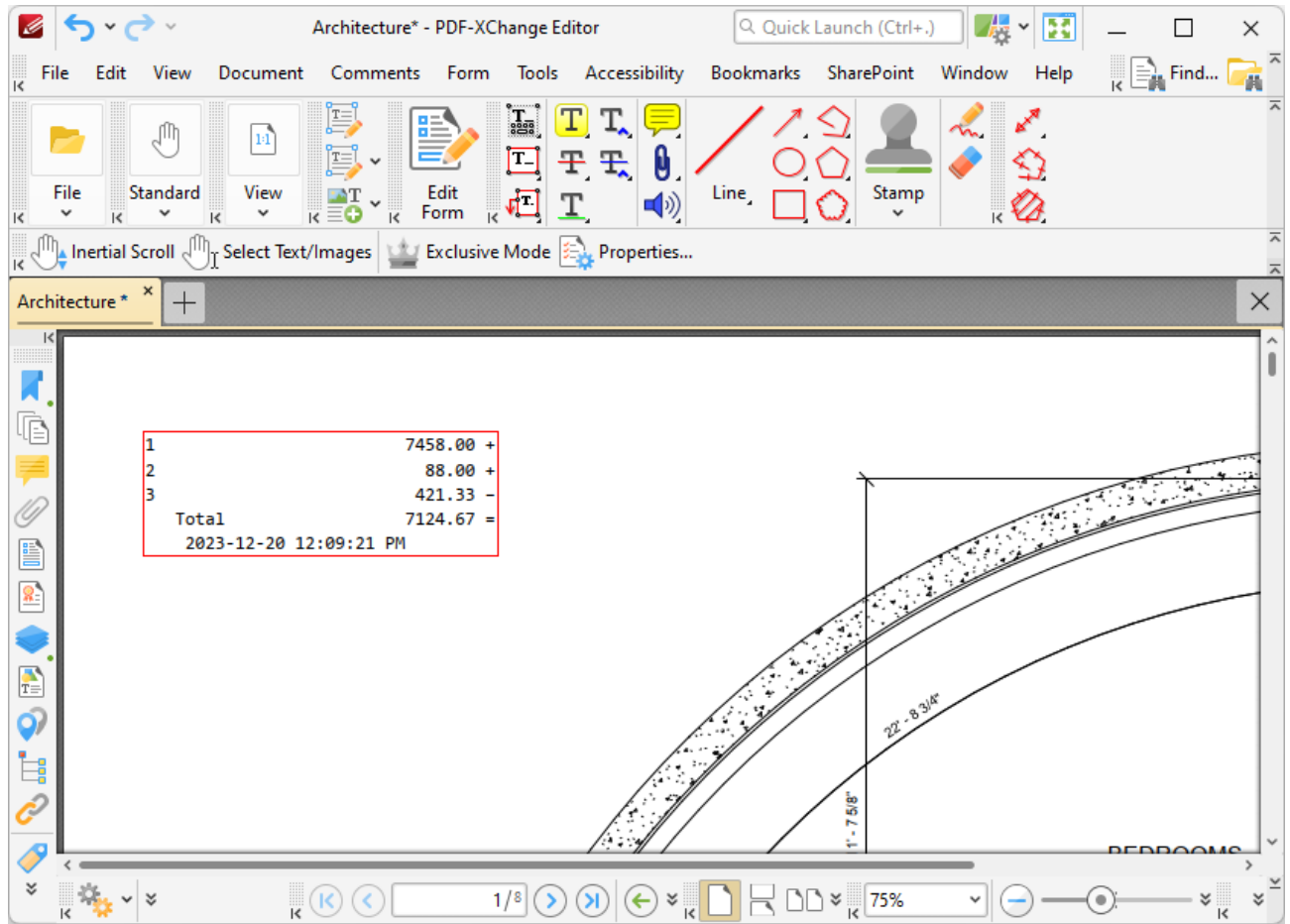
Figure 6. Accounting List Added

Note that accounting lists are contained with text box comments, and can therefore be edited in the same manner as text box comments, as detailed **here.** [859]

5.7.4.13 **Line Tool**

Line Tool

Click **Line Tool** to add line annotations to documents:
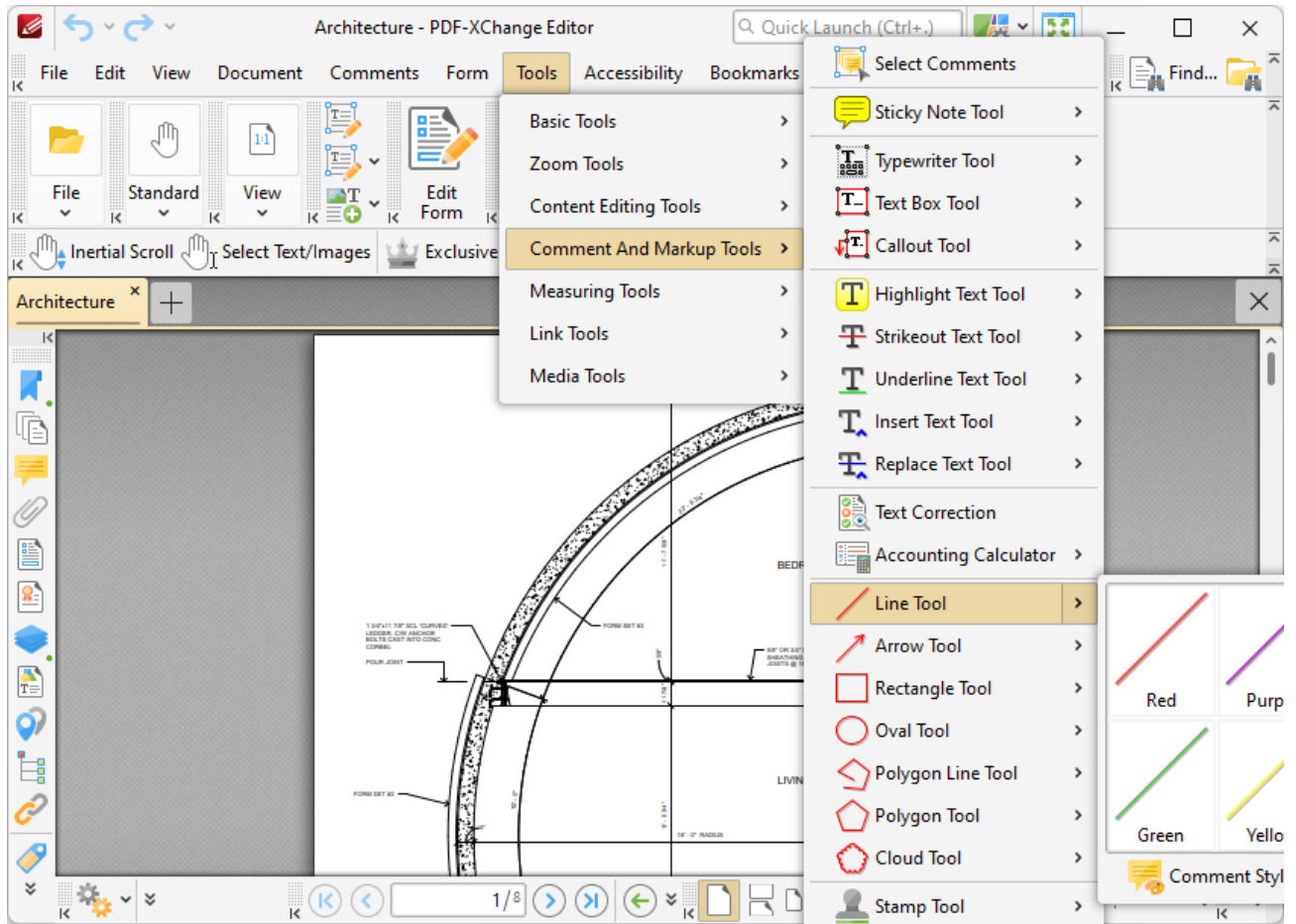
Figure 1. Tools Tab Submenu, Line Tool

The **Line Tool** is used to add line annotations to documents. When it is selected the pointer becomes a crosshairs icon. Click to initiate a line annotation, then drag to the desired location and click to complete the operation:
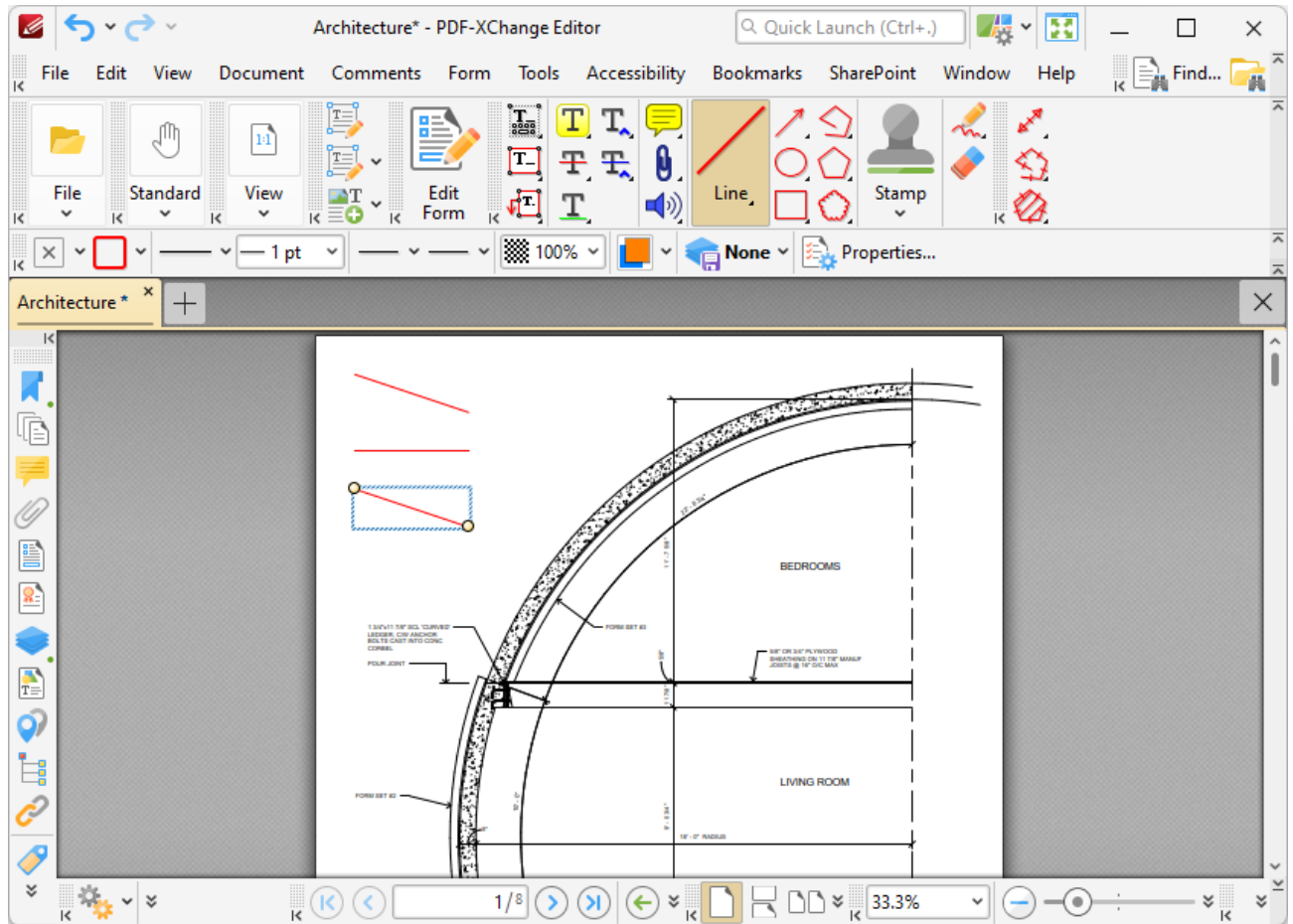
Figure 2. Line Annotation Examples

The lower line has just been placed, which means editing options are enabled:

- Click and drag the control points to reposition line endings.
- Click and drag line annotations to reposition it.
- Use the arrow keys to reposition line annotations. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** [610] to assist in the precise placement of line annotations.
- Right-click line annotations for further options. See **here** [1120] for an explanation of these options.
- Hold down Shift to create line annotations at increments of fifteen degrees.
- When the **Line Tool** is selected, the following options are enabled in the **Properties Toolbar:** [485]
  - **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
  - **Stroke Color** determines the line annotation color.
  - **Border Style** determines the line annotation style.
  - **Border Width** determines the size of the **Line Starting/Ending Styles** detailed below.
  - **Line Starting Style** determines the style used at the start of line annotations.
  - **Line Ending Style** determines the style used at the end of line annotations.

- **Opacity** determines the level of transparency in line annotations.
- **Blend Mode** determines how line annotations blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Line Tool** remains selected after an annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several line annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a single annotation.
- **Exclusive Mode** simplifies the process of using the **Line Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create content on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional line annotation properties, as detailed below.
- Note that several default styles are available for line annotations. Right-click the **Line** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette,** 791 which can be used to save customized line annotation styles for subsequent use.
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

Line Properties Pane
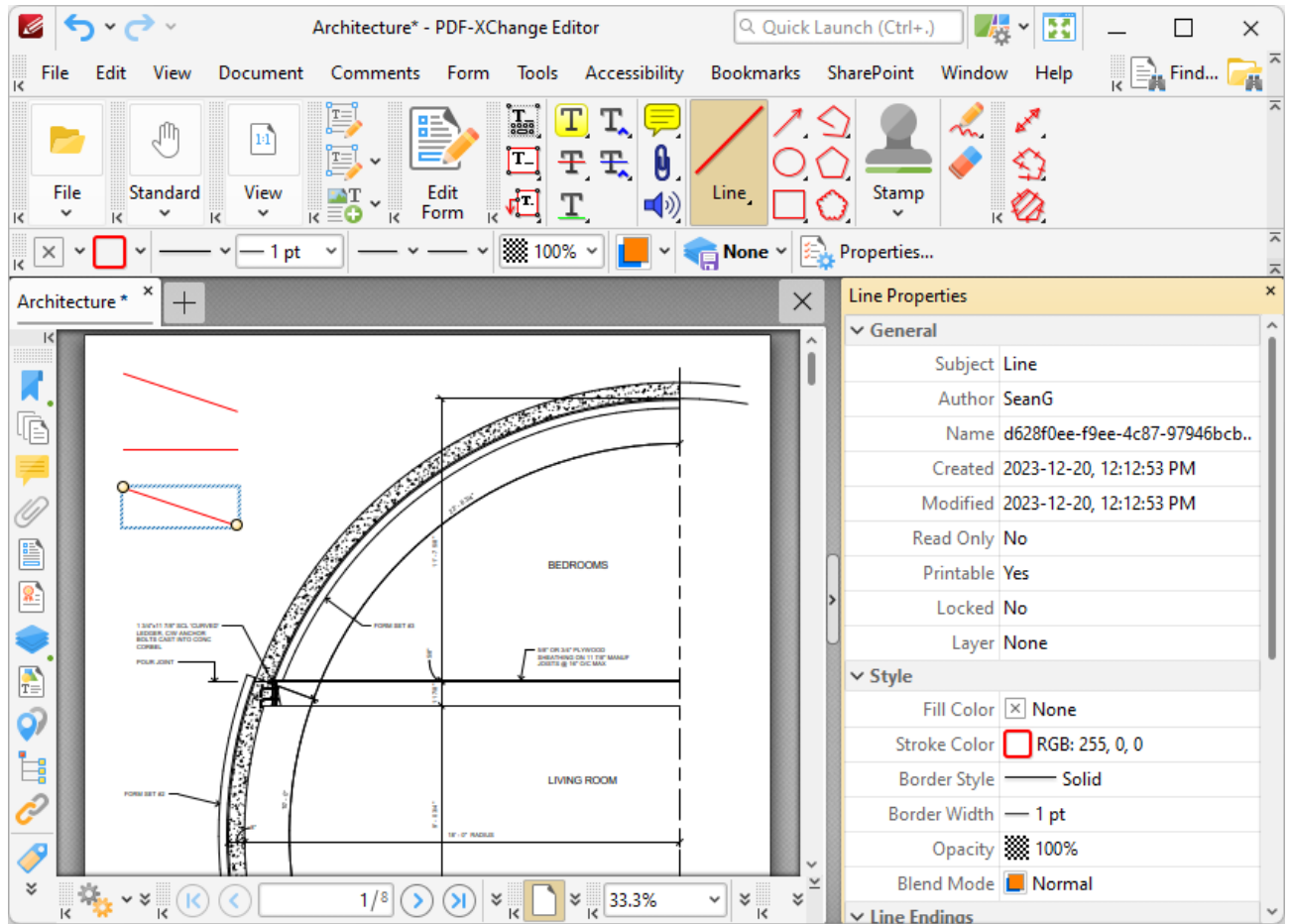
Figure 3. Line Properties Pane

- **Subject** is the name of the line annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the line annotation.
- **Name** is the unique name of the line annotation, as referenced within the application.
- **Created** is the date and time at which the line annotation was created.
- **Modified** is the date and time at which the line annotation was last modified.
- **Read Only** is the read only status of the line annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the line annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the line annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the line annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the line ending style used at the start of the line annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the line annotation.
- **Opacity** determines the level of transparency in the line annotation.
- **Blend Mode** determines how line annotations blend with overlapping content. These options are explained **here.** 1107
- **Start** determines the line ending style used at the start of the line annotation.
- **End** determines the line ending style used at the end of the line annotation.
- **Start Scale** determines the size of the line ending used at the start of the line annotation.
- **End Scale** determines the size of the line ending used at the end of the line annotation.
- **Leader Length** determines the length of the leader lines used for the line annotation. Leader lines extend from each endpoint of the line annotation, perpendicular to the annotation itself.
- **Leader Extension** determines the length of leader line extensions that extend from the line annotation.
- **Leader Offset** determines the length of the leader line offset, which is the amount of empty space between the endpoints of the line annotation and the beginning of the leader lines.
- **Show Caption** determines whether or not the text contained in the pop-up note of the annotation is displayed.
- **Inline Caption** determines whether or not the caption is an inline caption. If this option is enabled then captions are placed inside the line annotation instead of on top of the line annotation.
- **Length** determines the length of the line annotation.

Convert Line Annotations to Distance Annotations

If you want to convert line annotations to distance annotations, then right-click the annotation and click **Convert to Measurement:**
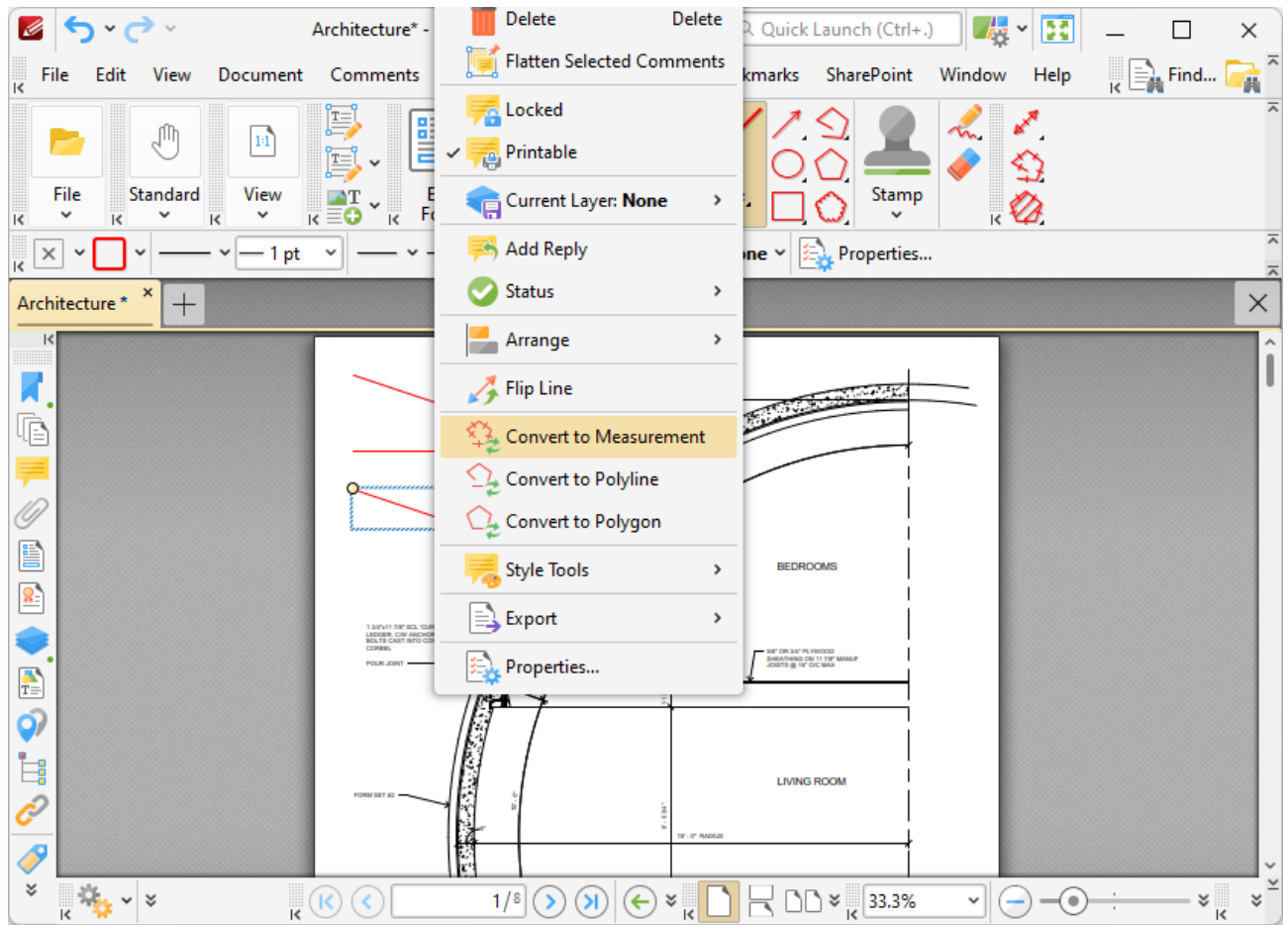
Figure 4. Right-Click Shortcut Menu, Convert to Measurement Highlighted

The annotation will then convert into a distance annotation. Note that it is possible to convert multiple annotations at the same time.

5.7.4.14 Arrow Tool

Arrow Tool

Click **Arrow Tool** to add arrow annotations to documents:
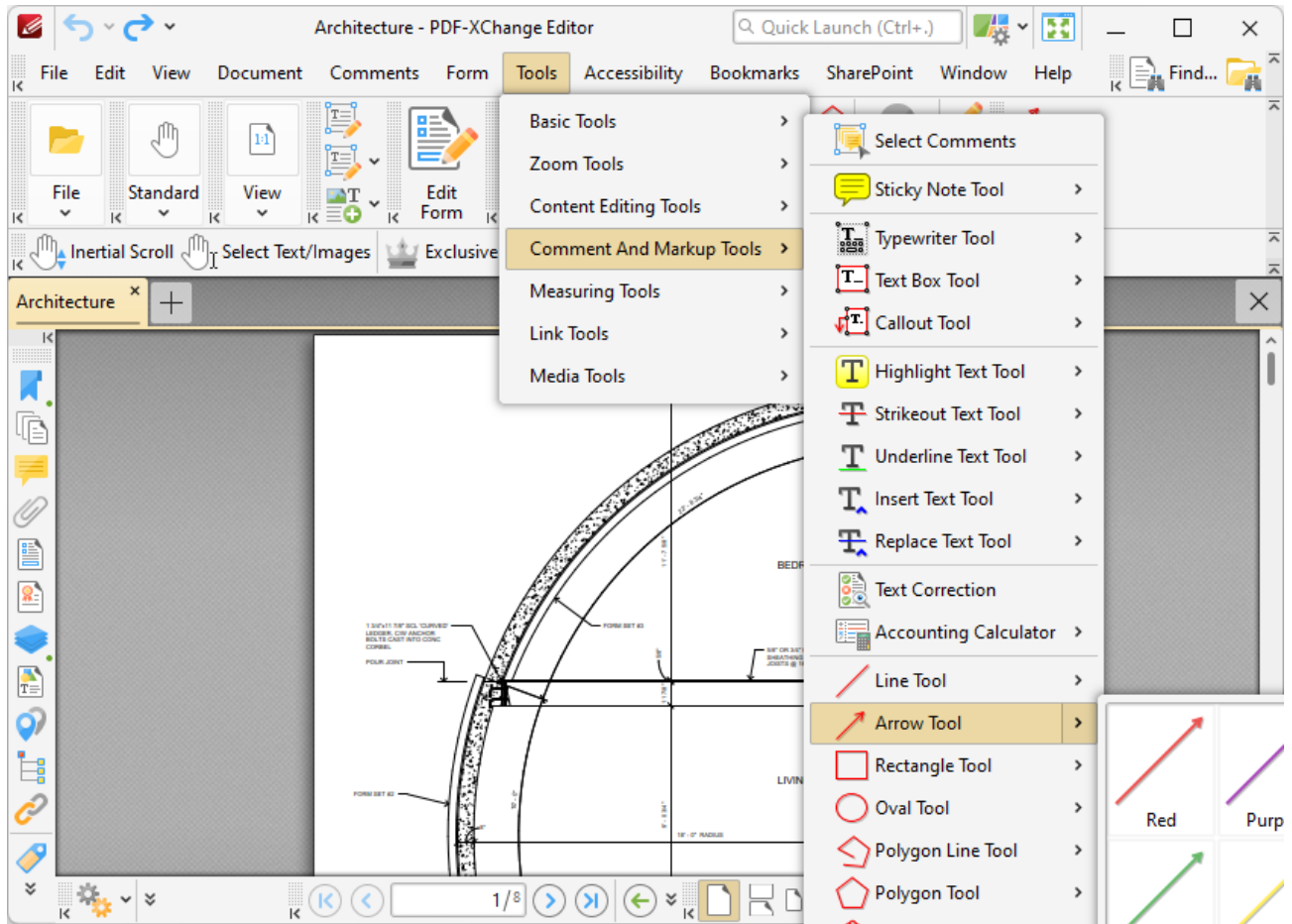
Figure 1. Tools Tab Submenu, Arrow Tool

The **Arrow Tool** is used to add arrow annotations to documents. When it is selected the pointer becomes a crosshairs icon. Click to initiate an arrow annotation, then drag to the desired location and click to complete the operation:
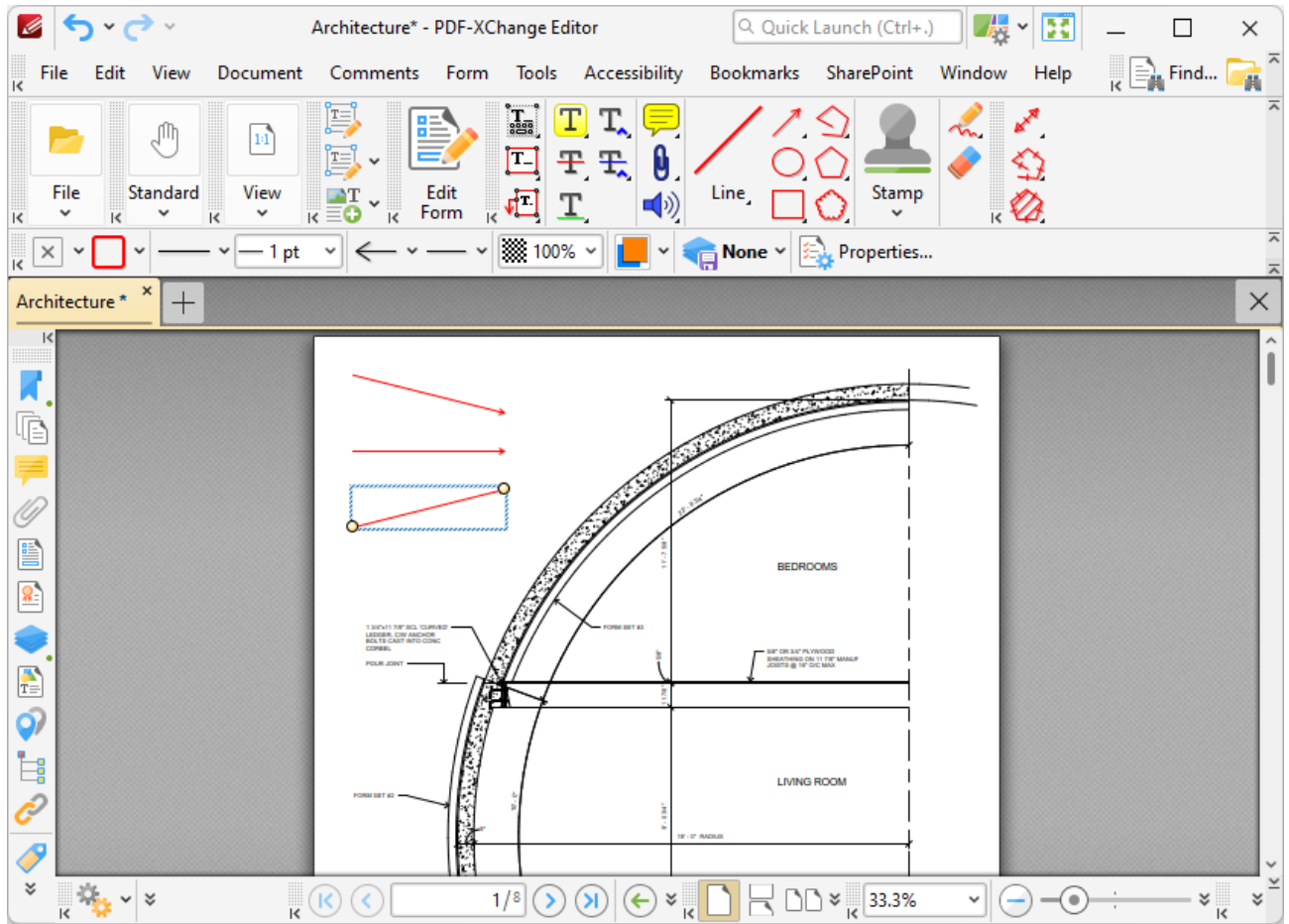
Figure 2. Arrow Annotation Examples

The lower arrow has just been placed, which means editing options are enabled:

- Click and drag the control points to reposition arrow annotation endings.
- Click and drag arrow annotations to reposition them.
- Use the arrow keys to reposition arrow annotations. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of arrow annotations.
- Right-click arrow annotations for further options. See **here** 1120 for an explanation of these options.
- Hold down Shift to create arrow annotations at increments of fifteen degrees.
- When the **Arrow Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
  - **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
  - **Stroke Color** determines the arrow annotation color.
  - **Border Style** determines the arrow annotation style.
  - **Border Width** determines the size of the **Line Starting/Ending Styles** detailed below.
  - **Line Starting Style** determines the style used at the start of arrow annotations.

- **Line Ending Style** determines the style used at the end of arrow annotations.
- **Opacity** determines the level of transparency in arrow annotations.
- **Blend Mode** determines how arrow annotations blend with underlying content. These options are explained **here.** ¹¹⁰⁷
- **Keep Selected** determines whether or not the **Arrow Tool** remains selected after an annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several arrow annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a single annotation.
- **Exclusive Mode** simplifies the process of using the **Arrow Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create content on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional arrow annotation properties, as detailed below.
- Note that several default styles are available for arrow annotations. Right-click the **Line** icon in the **Comment Toolbar** ³¹⁷ to view existing styles and/or access the **Comment Styles Palette,** ⁷⁹¹ which can be used to save customized arrow annotation styles for subsequent use.
- The **Commenting** ²⁵⁰ section of the **Preferences** ²²⁸ dialog box can be used to view/edit preferences for comments.

Arrow Properties Pane
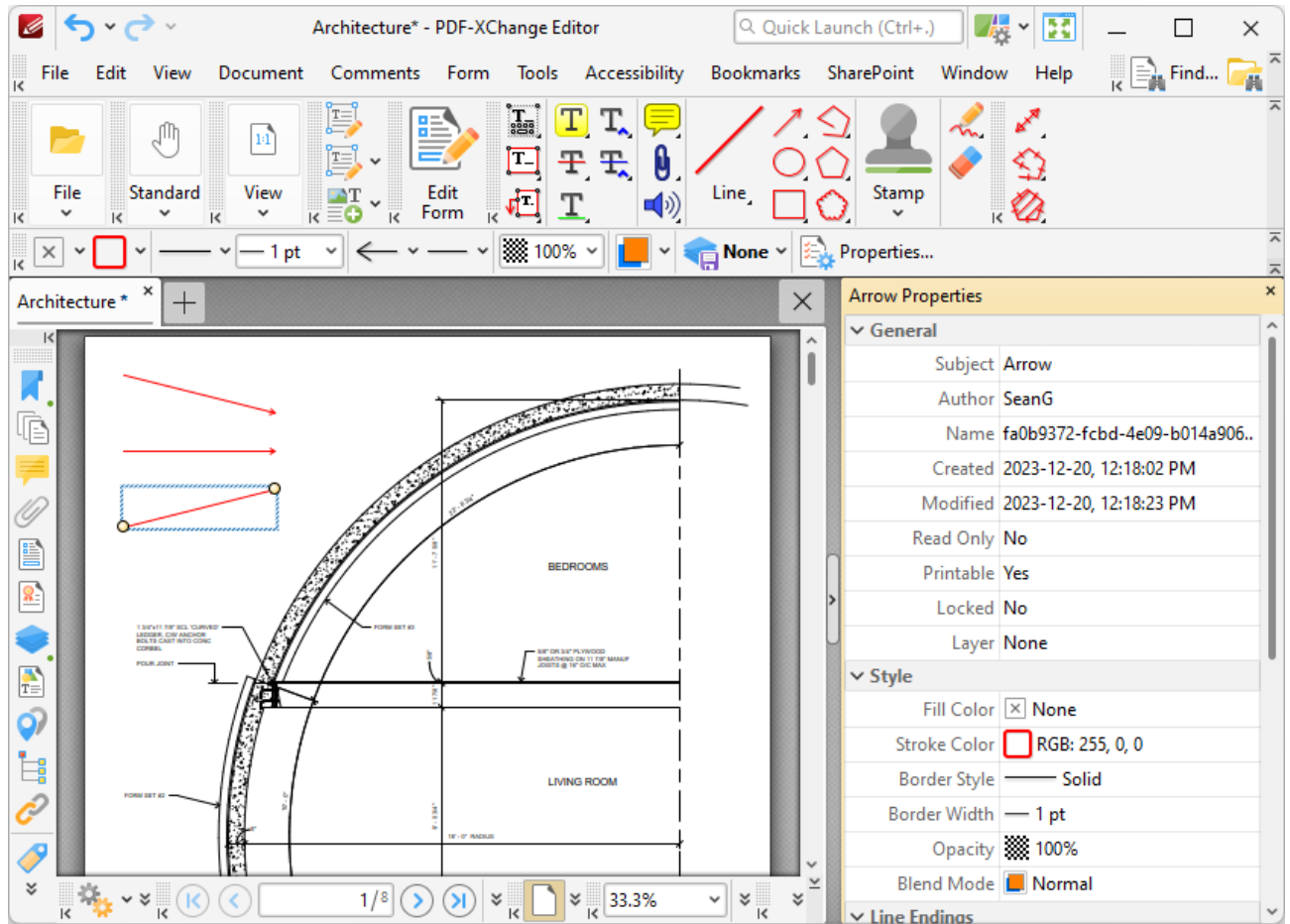
Figure 3. Arrow Properties Pane

- **Subject** is the name of the arrow annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the arrow annotation.
- **Name** is the unique name of the arrow annotation, as referenced within the application.
- **Created** is the date and time at which the arrow annotation was created.
- **Modified** is the date and time at which the arrow annotation was last modified.
- **Read Only** is the read only status of the arrow annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the arrow annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the arrow annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the arrow annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the line ending style used at the start of the arrow annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the arrow annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the arrow annotation.
- **Blend Mode** determines how arrow annotations blend with overlapping content. These options are explained **here.** 1107
- **Start** determines the line ending style used at the start of the arrow annotation.
- **End** determines the line ending style used at the end of the arrow annotation.
- **Start Scale** determines the size of the line ending used at the start of the arrow annotation.
- **End Scale** determines the size of the line ending used at the end of the arrow annotation.
- **Leader Length** determines the length of the leader lines used for the arrow annotation. Leader lines extend from each endpoint of the arrow annotation, perpendicular to the arrow annotation itself.
- **Leader Extension** determines the length of leader line extensions that extend from the arrow annotation.
- **Leader Offset** determines the length of the leader line offset, which is the amount of empty space between the endpoints of the arrow annotation and the beginning of the leader lines.
- **Show Caption** determines whether or not the text contained in the pop-up note of the annotation is displayed.
- **Inline Caption** determines whether or not the caption is an inline caption. If this option is enabled then captions are placed inside the arrow annotation instead of on top of the arrow annotation.
- **Length** determines the length of the arrow annotation.

Convert Arrow Annotations to Distance Annotations

If you want to convert arrow annotations to distance annotations, then right-click the annotation and click **Convert to Measurement:**
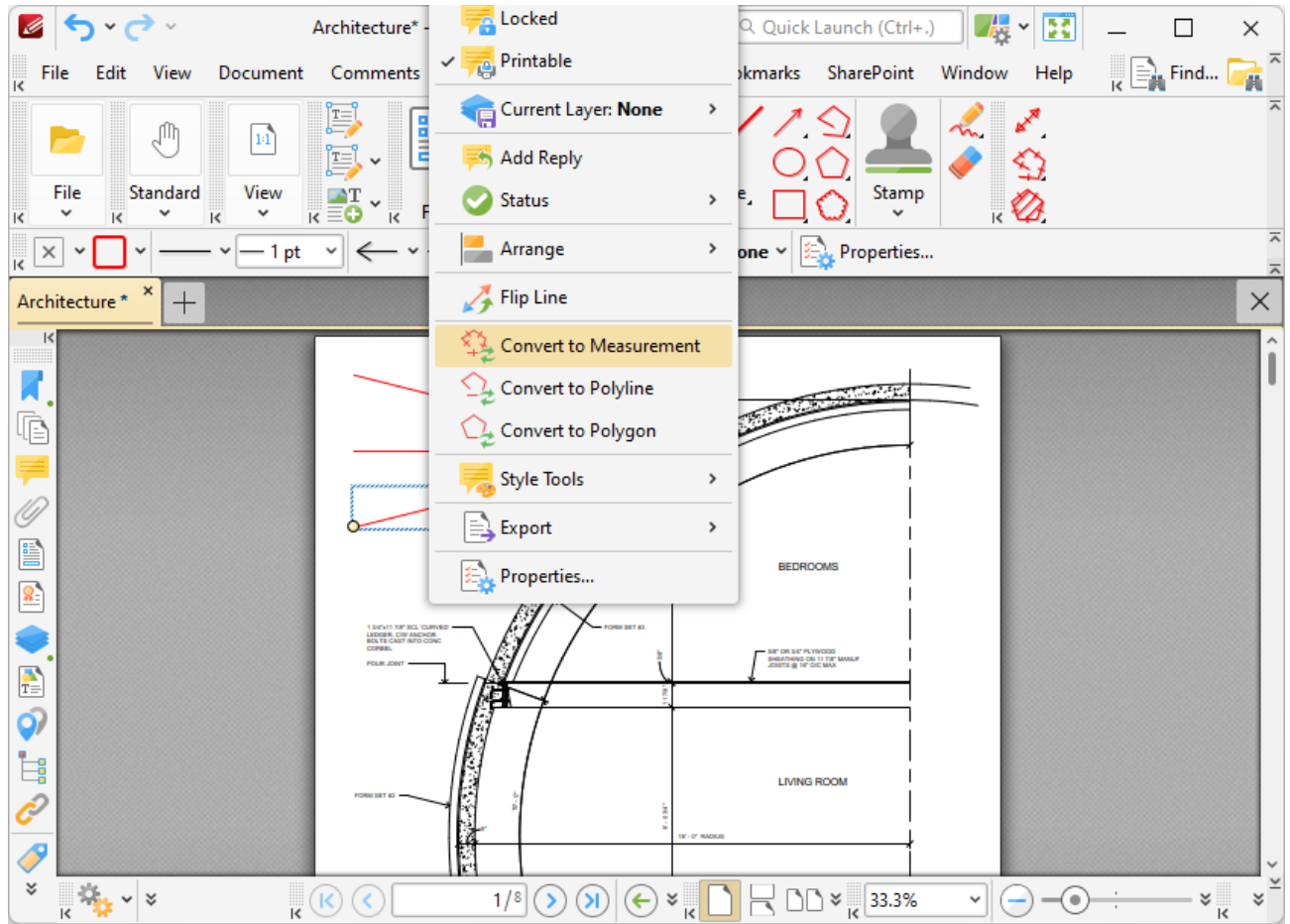
Figure 4. Right-Click Shortcut Menu, Convert to Measurement Highlighted

The annotation will then convert into a distance annotation. Note that it is possible to convert multiple annotations at the same time.

5.7.4.15   Rectangle Tool

 Rectangle Tool

Click **Rectangle Tool** to add rectangle annotations to documents:
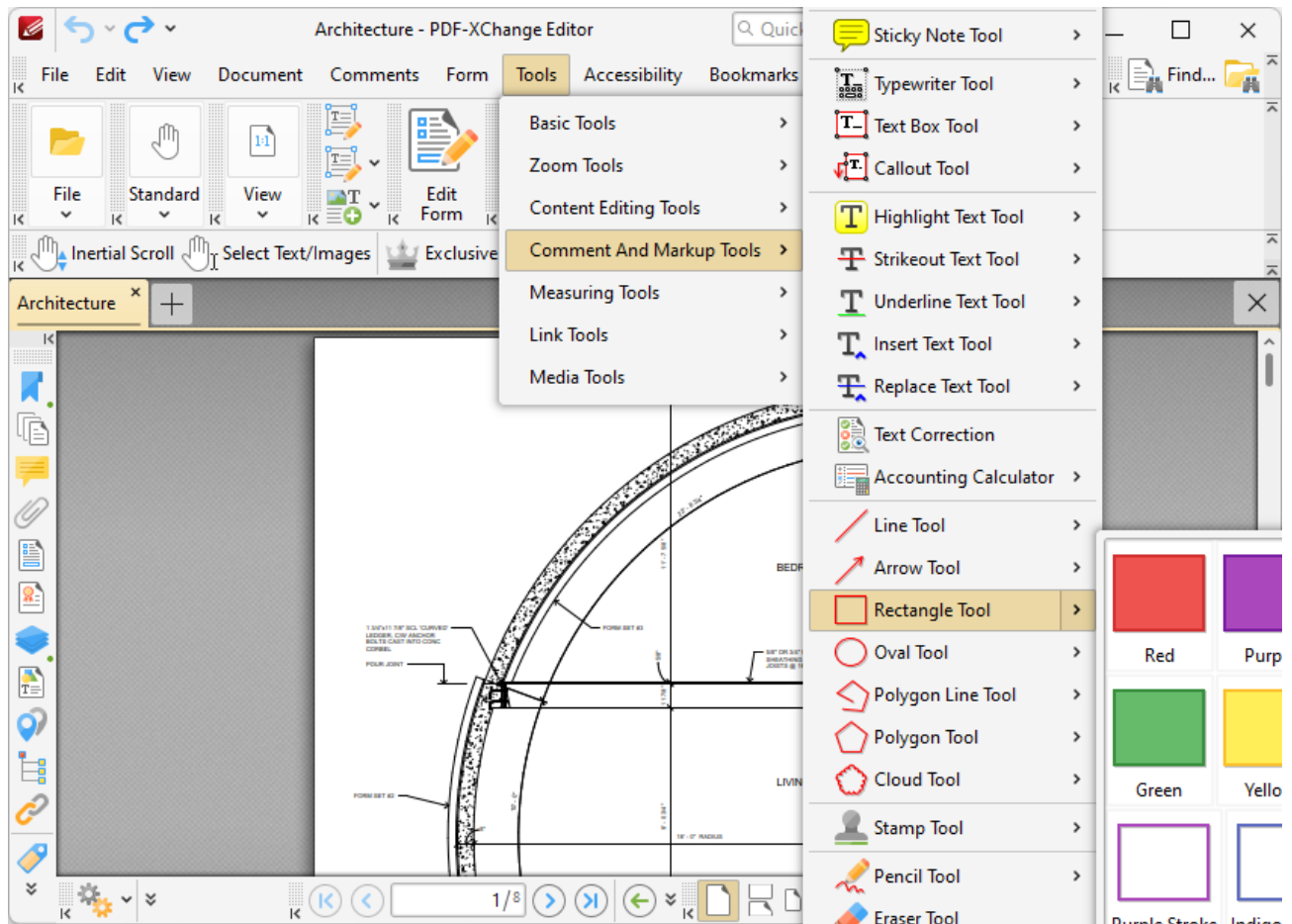
Figure 1. Tools Tab Submenu, Rectangle Tool

When the **Rectangle Tool** is selected, click and drag the pointer to determine rectangle borders:
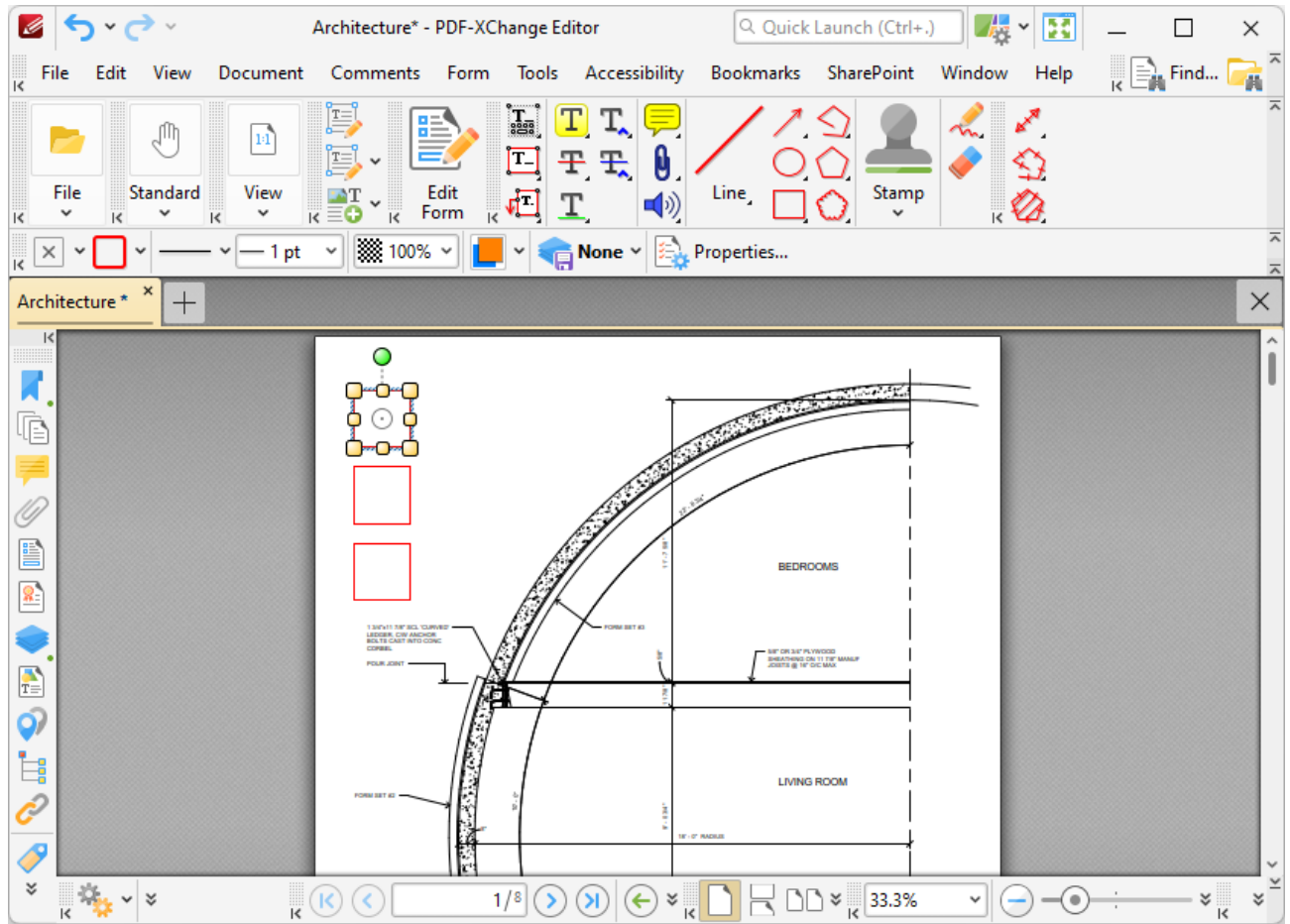
Figure 2. Rectangle Tool Examples

The upper rectangle has just been placed, which means editing options are enabled:

- Click and drag the control points to resize rectangles.
- Click and drag rectangles to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate rectangles. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition rectangles. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of rectangles.
- Right-click rectangles for further options. See **here** 1120 for an explanation of these options.
- Hold down Ctrl to create rectangles from their center.
- Hold down Alt to constrain rectangle proportions.
- When the **Rectangle Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the fill color of rectangles.
    - **Stroke Color** determines the color of rectangle borders.
    - **Border Style** determines the style of rectangle borders.

- **Border Width** determines the width of rectangle borders.
- **Opacity** determines the level of transparency in rectangles.
- **Blend Mode** determines how rectangles blend with underlying content. These options are explained **here.** [1107]
- **Keep Selected** determines whether or not the **Rectangle Tool** remains selected after a rectangle has been created. If this option is enabled then the tool will remain selected and can be used to create several rectangles consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a rectangle.
- **Exclusive Mode** simplifies the process of using the **Rectangle Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create rectangles on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional rectangle annotation properties, as detailed below.

- Note that several default styles are available for rectangles, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** [791] can be used to save customized rectangle styles for subsequent use. Right-click the **Rectangle** icon in the **Comment Toolbar** [317] to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** [250] section of the **Preferences** [228] dialog box can be used to view/edit preferences for comments.
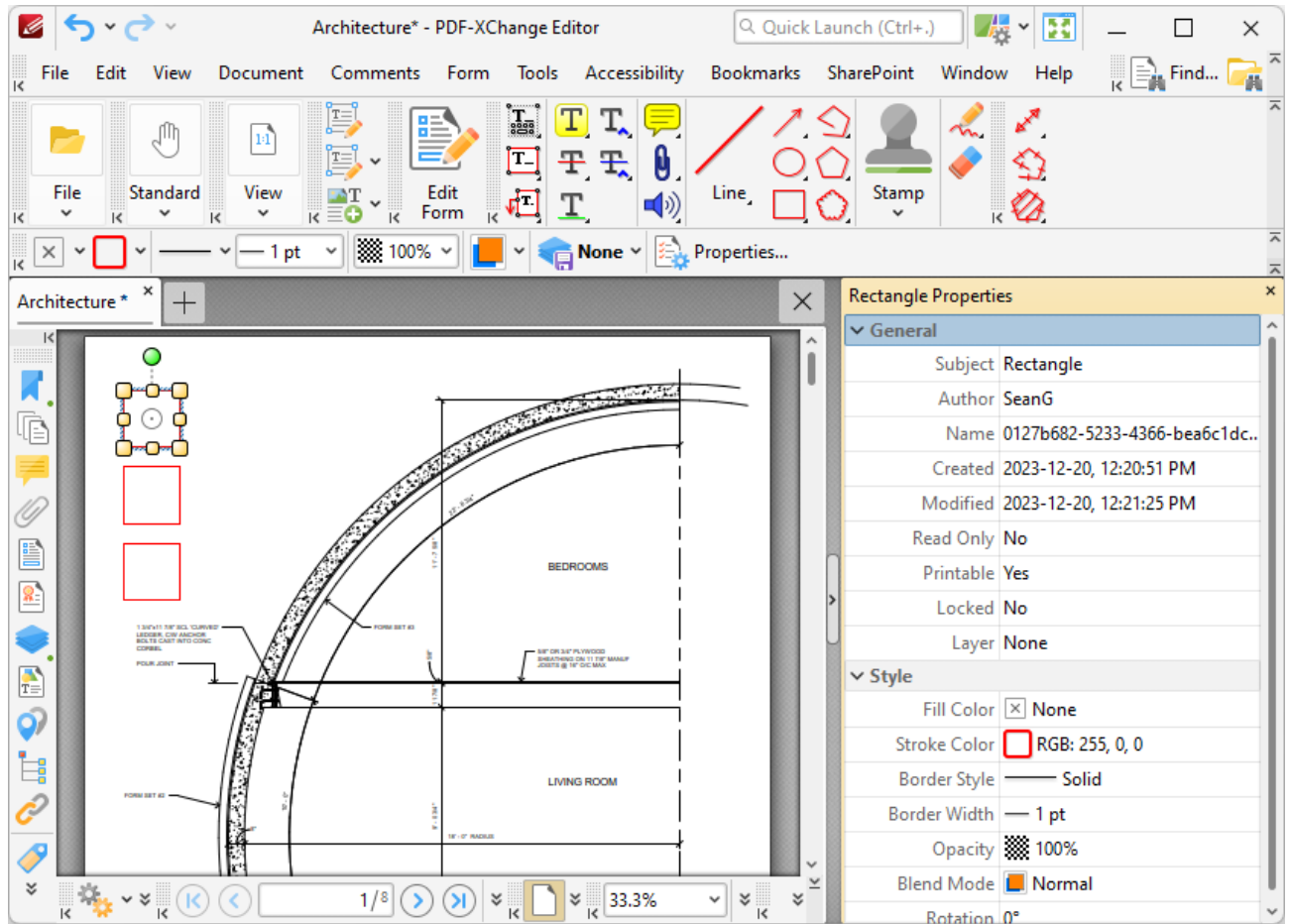
Figure 3. Rectangle Properties Pane

- **Subject** is the name of the rectangle annotation, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the rectangle annotation.
- **Name** is the unique name of the rectangle annotation, as referenced within the application.
- **Created** is the date and time at which the rectangle annotation was created.
- **Modified** is the date and time at which the rectangle annotation was last modified.
- **Read Only** is the read only status of the rectangle annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the rectangle annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the rectangle annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the rectangle annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the line ending style used at the start of the rectangle annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the rectangle annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the rectangle annotation.
- **Blend Mode** determines how rectangle annotations blend with overlapping content. These options are explained **here.** [1107]
- **Rotation** determines the degrees of rotation of the rectangle annotation.

Convert Rectangle Annotations to Measurement Annotations

If you want to convert rectangle annotations to measurement annotations, then right-click the rectangle annotation and click **Convert to Measurement:**
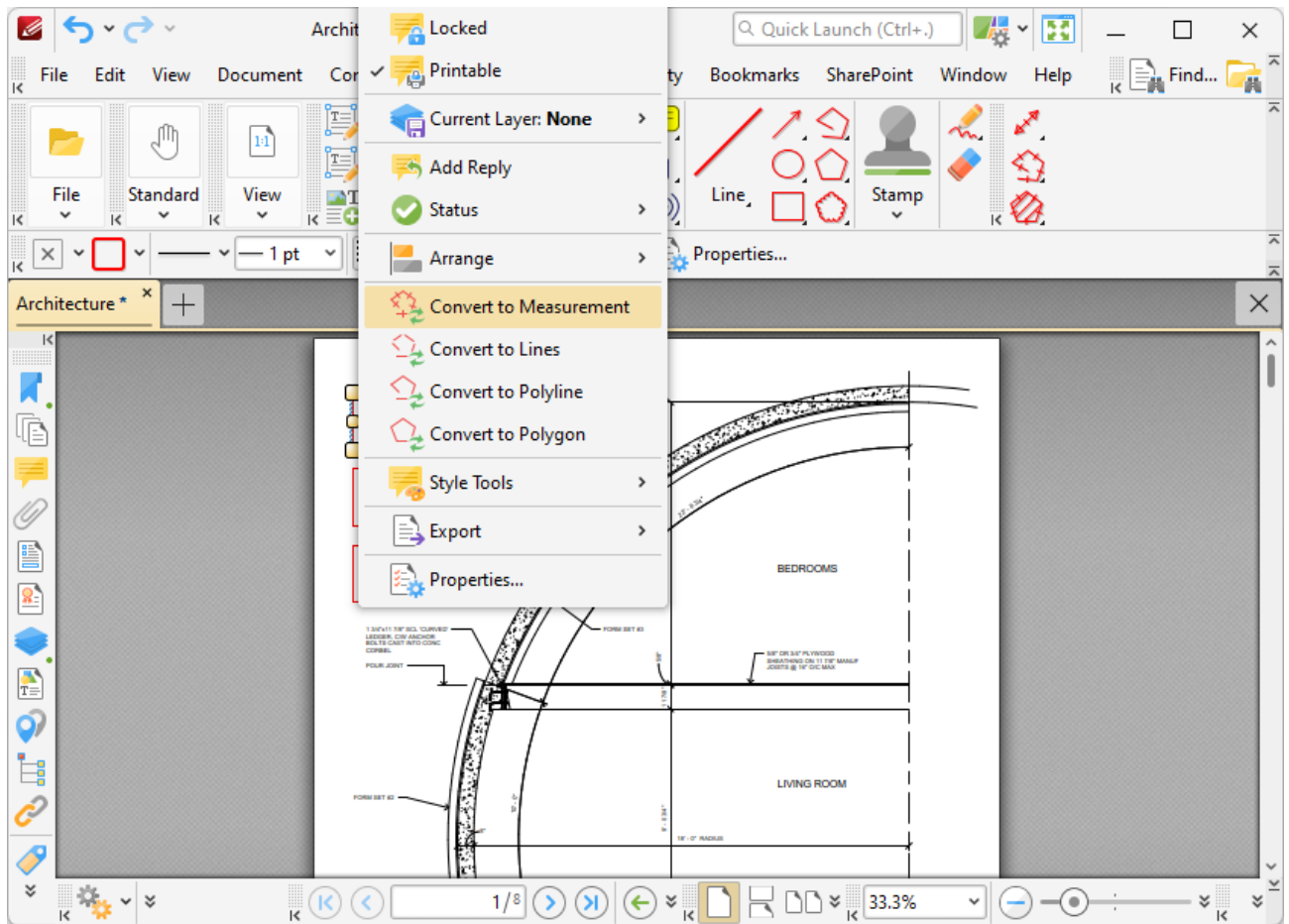
Figure 4. Right-Click Shortcut Menu, Convert to Measurement Highlighted

The rectangle annotation will then convert into a measurement annotation. Note that it is possible to convert multiple annotations at the same time.

5.7.4.16 Oval Tool

Oval Tool

Click **Oval Tool** to add oval annotations to documents:
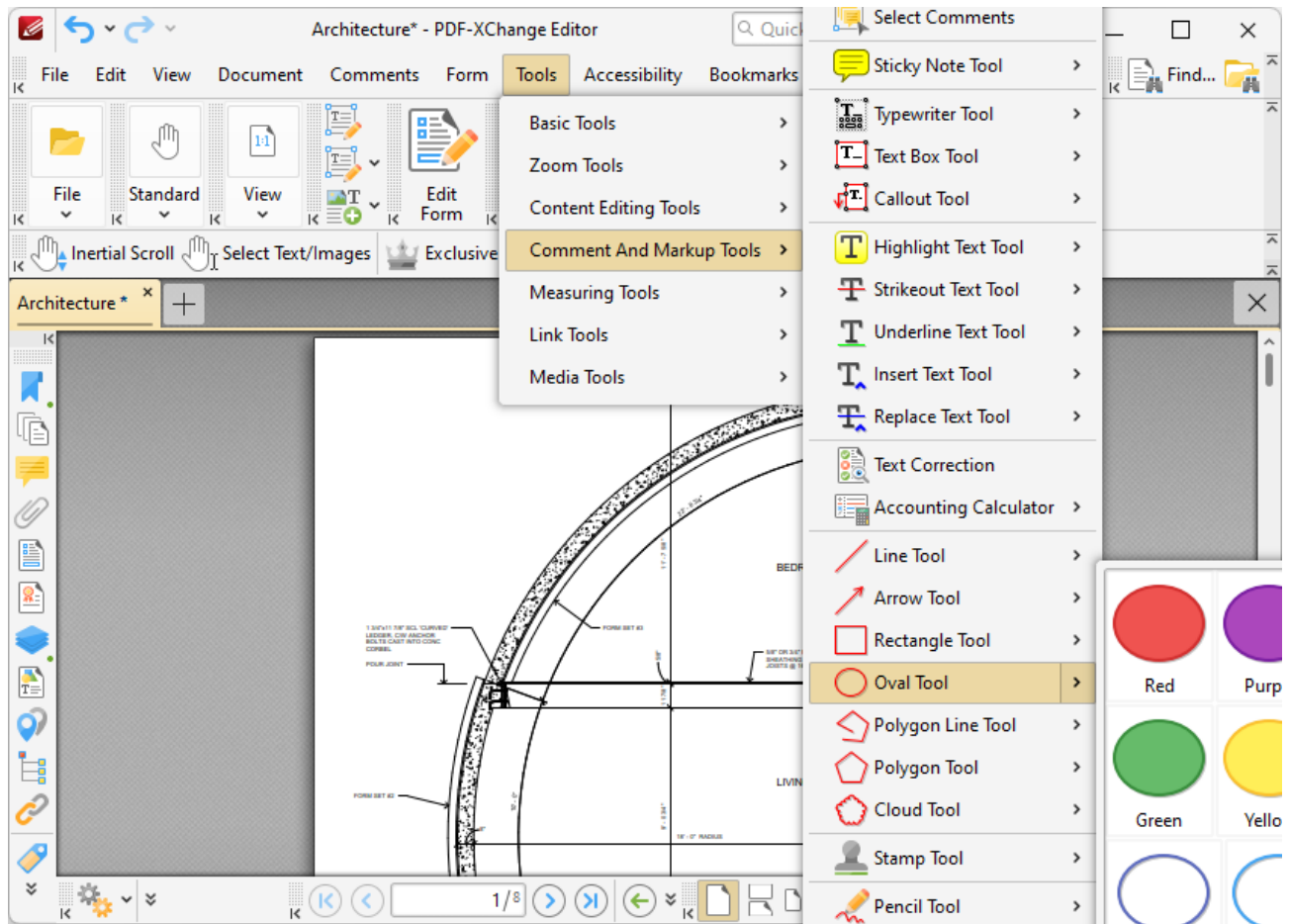
Figure 1. Tools Tab Submenu, Oval Tool

When the **Oval Tool** is selected, click and drag the pointer to define oval borders:
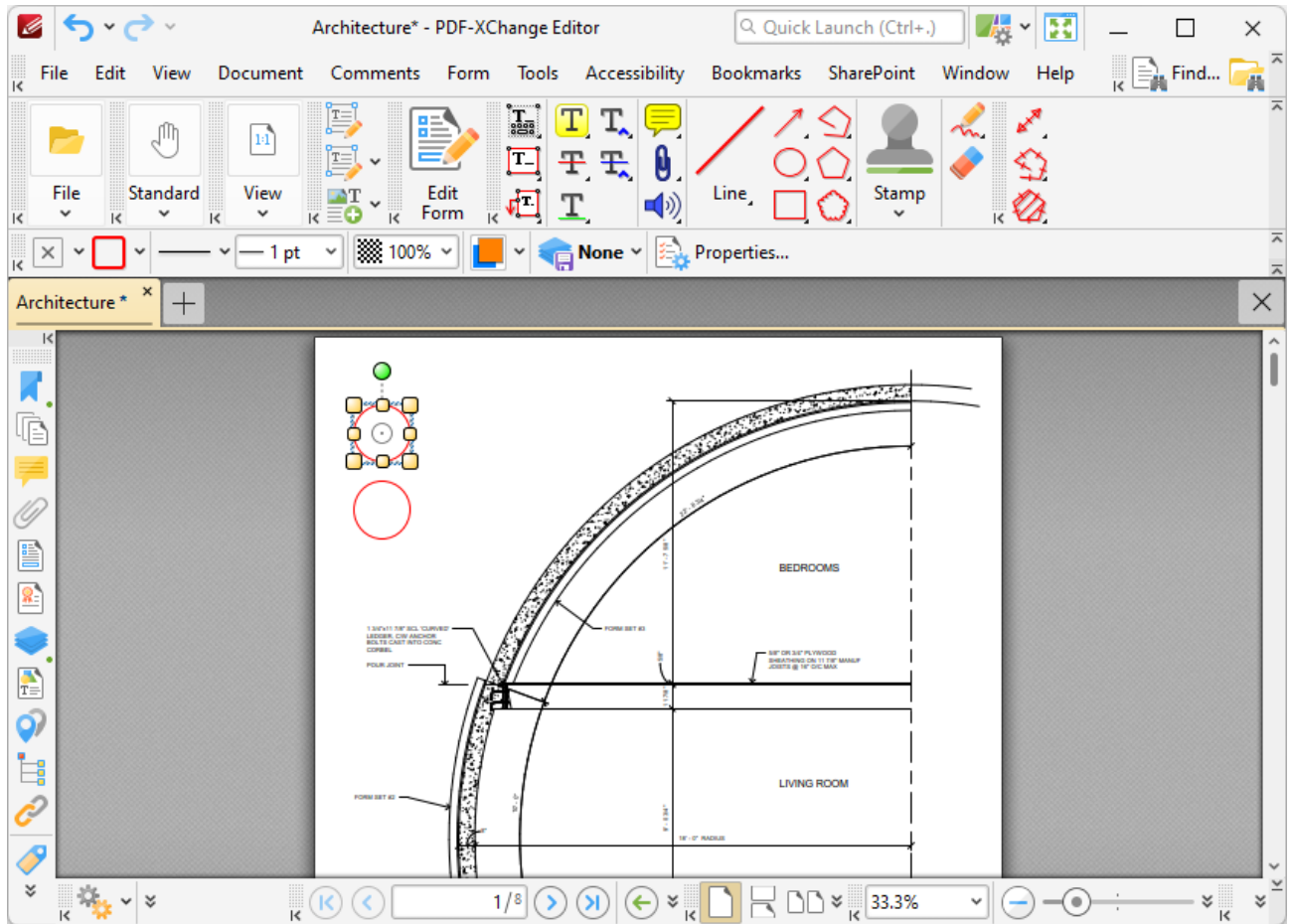
Figure 2. Oval Tool Examples

The upper oval has just been placed, which means editing options are enabled:

- Click and drag the control points to resize ovals.
- Click and drag ovals to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate ovals. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition ovals. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of ovals.
- Hold down Ctrl to create ovals from their center.
- Right-click ovals for further options. See **here** 1120 for an explanation of these options.
- When the **Oval Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
  - **Fill Color** determines the fill color of ovals.
  - **Stroke Color** determines the color of oval borders.
  - **Border Style** determines the style of oval borders.
  - **Border Width** determines the width of oval borders.
  - **Opacity** determines the level of transparency in ovals.

- **Blend Mode** determines how ovals blend with underlying content. These options are explained **here.** [1107]
- **Keep Selected** determines whether or not the **Oval Tool** remains selected after an oval has been created. If this option is enabled then the tool will remain selected and can be used to create several ovals consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating an oval.
- **Exclusive Mode** simplifies the process of using the **Oval Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create ovals on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional oval annotation properties, as detailed below.

- Note that several default styles are available for ovals, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** [791] can be used to save customized oval styles for subsequent use. Right-click the **Oval** icon in the **Comment Toolbar** [317] to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** [250] section of the **Preferences** [228] dialog box can be used to view/edit preferences for comments.

Oval Properties Pane
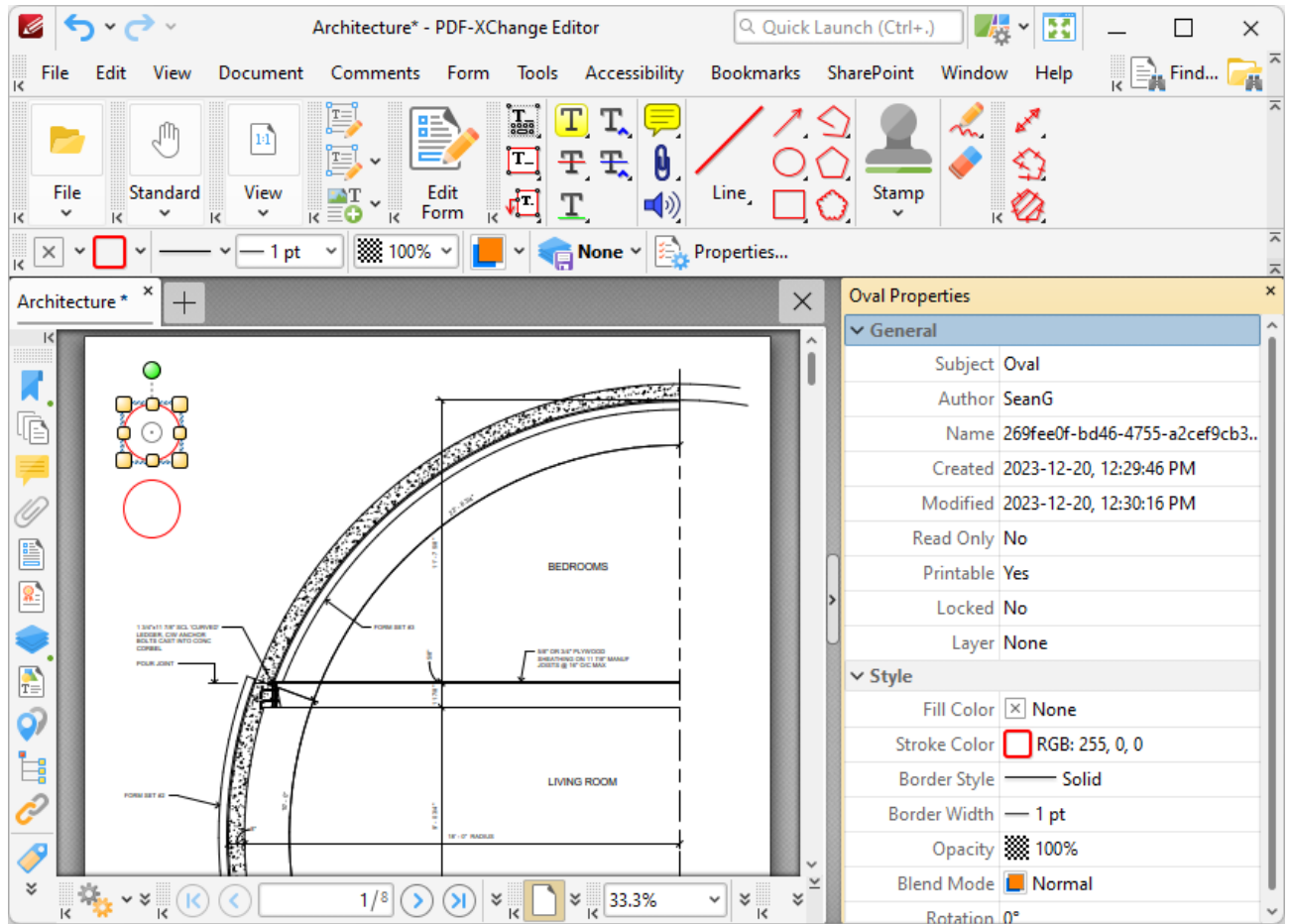
Figure 3. Oval Properties Pane

- **Subject** is the name of the oval annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the oval annotation.
- **Name** is the unique name of the oval annotation, as referenced within the application.
- **Created** is the date and time at which the oval annotation was created.
- **Modified** is the date and time at which the oval annotation was last modified.
- **Read Only** is the read only status of the oval annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the oval annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the oval annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the oval annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the line ending style used at the start of the oval annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the oval annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the oval annotation.
- **Blend Mode** determines how oval annotations blend with overlapping content. These options are explained **here.** [1107]
- **Rotation** determines the degrees of rotation of the oval annotation.

5.7.4.17 **Polygon Line Tool**

Polygon Line Tool

Click **Polygon Line Tool** to add polygon line annotations to documents:
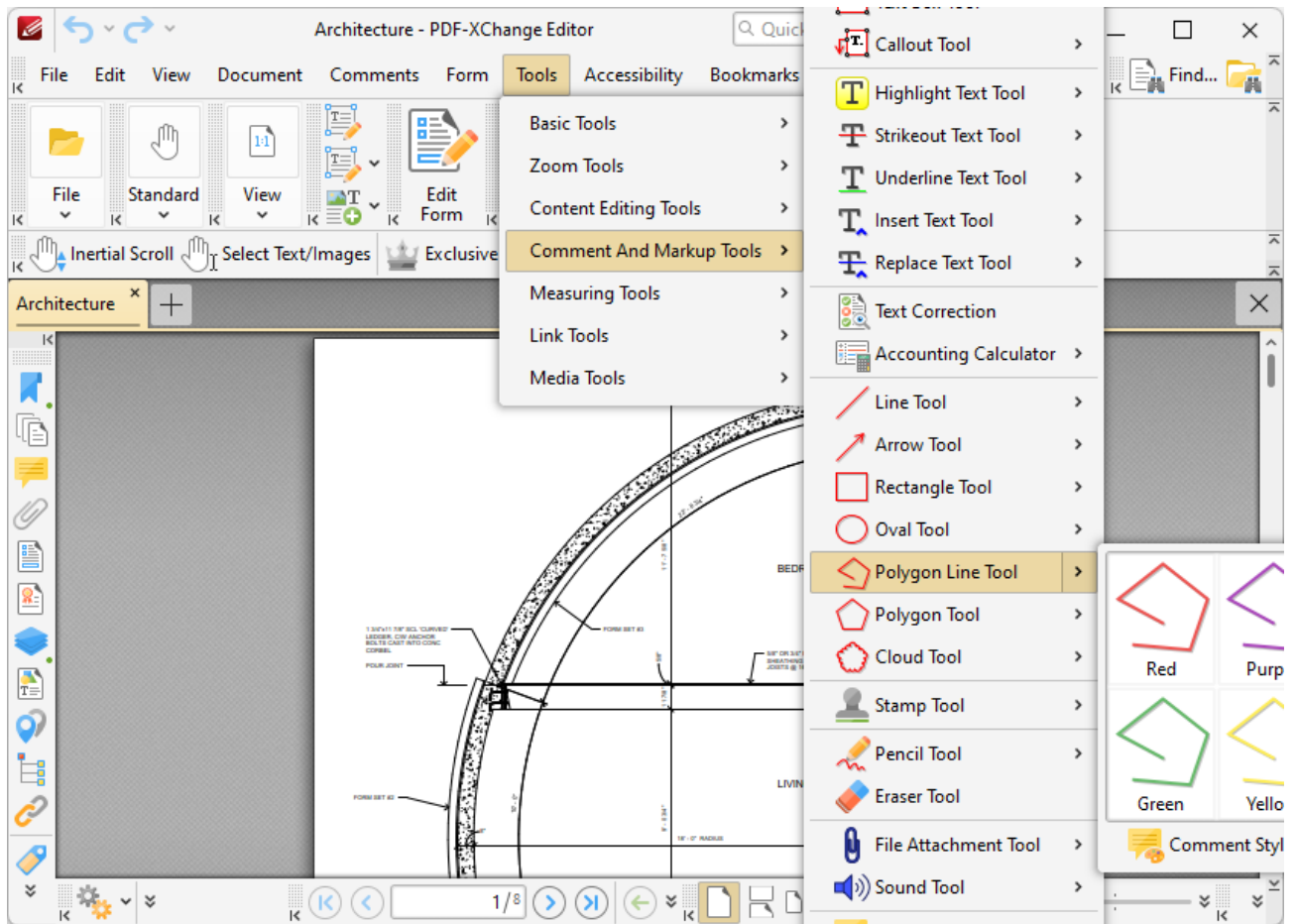
Figure 1. Tools Tab Submenu, Polygon Line Tool

When the **Polygon Line Tool** is selected, click to designate the starting point of the first line. Then move the pointer to the next desired location and click to designate the end of the first line and the beginning of the next line. Repeat this process until the final point of the desired shape is reached and then double-click to complete the line. Examples of the tool annotations are detailed below:

Figure 2. Polygon Line Tool Example

The upper polygon line has just been placed, which means editing options are enabled:

- Click and drag the outer control points to resize polygon lines.
- Click and drag the inner control points to reposition them.
- Click and drag polygon lines to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate polygon lines. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition polygon lines. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of polygon lines.
- Right-click polygon lines for further options. See **here** 1120 for an explanation of these options.
- When the **Polygon Line Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
    - **Stroke Color** determines the color of polygon line borders.
    - **Border Style** determines the style of polygon line borders.

- **Border Width** determines the width of polygon line borders.
- **Line Starting Style** determines the style at the start of polygon lines.
- **Line Ending Style** determines the style at the end of polygon lines.
- **Opacity** determines the level of transparency in polygon lines.
- **Blend Mode** determines how polygon lines blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Polygon Line Tool** remains selected after a polygon line has been created. If this option is enabled then the tool will remain selected and can be used to create several polygon lines consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a polygon line.
- **Exclusive Mode** simplifies the process of using the **Polygon Line Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create polygon lines on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional polygon line properties, as detailed below.
- Note that several default styles are available for polygon lines, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized polygon line styles for subsequent use. Right-click the **Polyline** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

Polygon Line Properties Pane

Figure 3. Polygon Line Properties Pane

- **Subject** is the name of the polygon line annotation, as referenced in the **Comments**[519] pane.
- **Author** is the name of the user that created the polygon line annotation.
- **Name** is the unique name of the polygon line annotation, as referenced within the application.
- **Created** is the date and time at which the polygon line annotation was created.
- **Modified** is the date and time at which the polygon line annotation was last modified.
- **Read Only** is the read only status of the polygon line annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the polygon line annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the polygon line annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the polygon line annotation belongs. Further information about layers is available **here.**[535]
- **Fill Color** determines the color of the line ending style used at the start of the polygon line annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the polygon line annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the polygon line annotation.
- **Blend Mode** determines how polygon line annotations blend with overlapping content. These options are explained **here.** [1107]
- **Rotation** determines the degrees of rotation of the polygon line annotation.
- **Start** determines the line ending style used at the start of the polygon line annotation.
- **End** determines the line ending style used at the end of the polygon line annotation.
- **Start Scale** determines the size of the line ending used at the start of the polygon line annotation.
- **End Scale** determines the size of the line ending used at the end of the polygon line annotation.

Convert Polygon Line Annotations to Perimeter Annotations

If you want to convert polygon line annotations to perimeter annotations, then right-click the polygon line annotation and click **Convert to Measurement:**
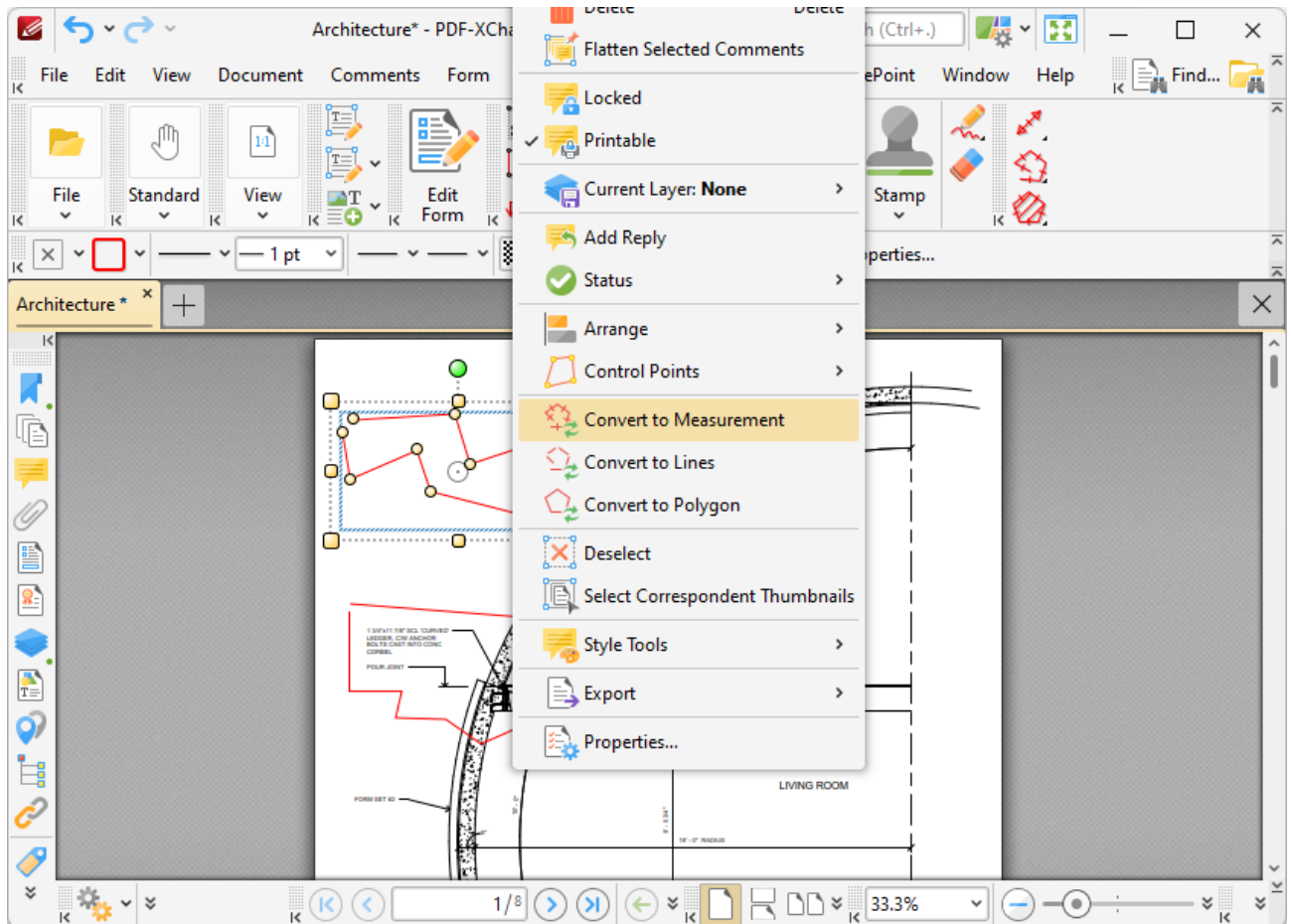
Figure 4. Right-Click Shortcut Menu, Convert to Measurement Highlighted

The polygon line annotation will then convert into a perimeter annotation. Note that it is possible to convert multiple annotations at the same time.

Convert Polygon Line Annotations to Multiple Line Annotations

If you want to convert polygon line annotations to multiple line annotations, then right-click the polygon line annotation and click **Convert to Lines:**

Figure 5. Right-Click Shortcut Menu, Convert to Lines Highlighted
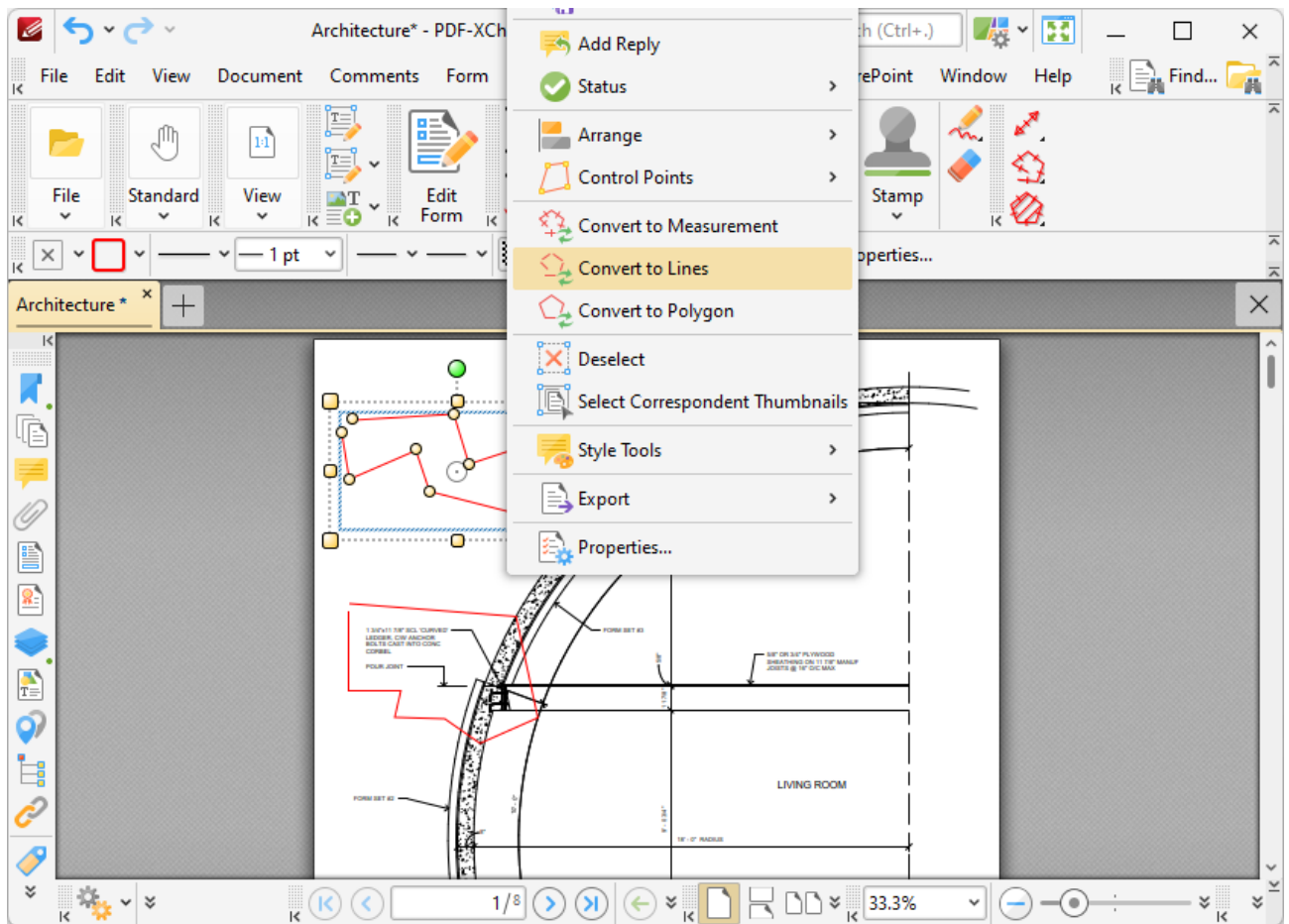
The polygon line annotation will then be converted into multiple line annotations that can be edited as separate annotations:

Figure 6. Polygon Line Annotation Converted into Line Annotations

5.7.4.18 Polygon Tool

Polygon Tool

Click **Polygon Tool** to add polygon annotations to documents:
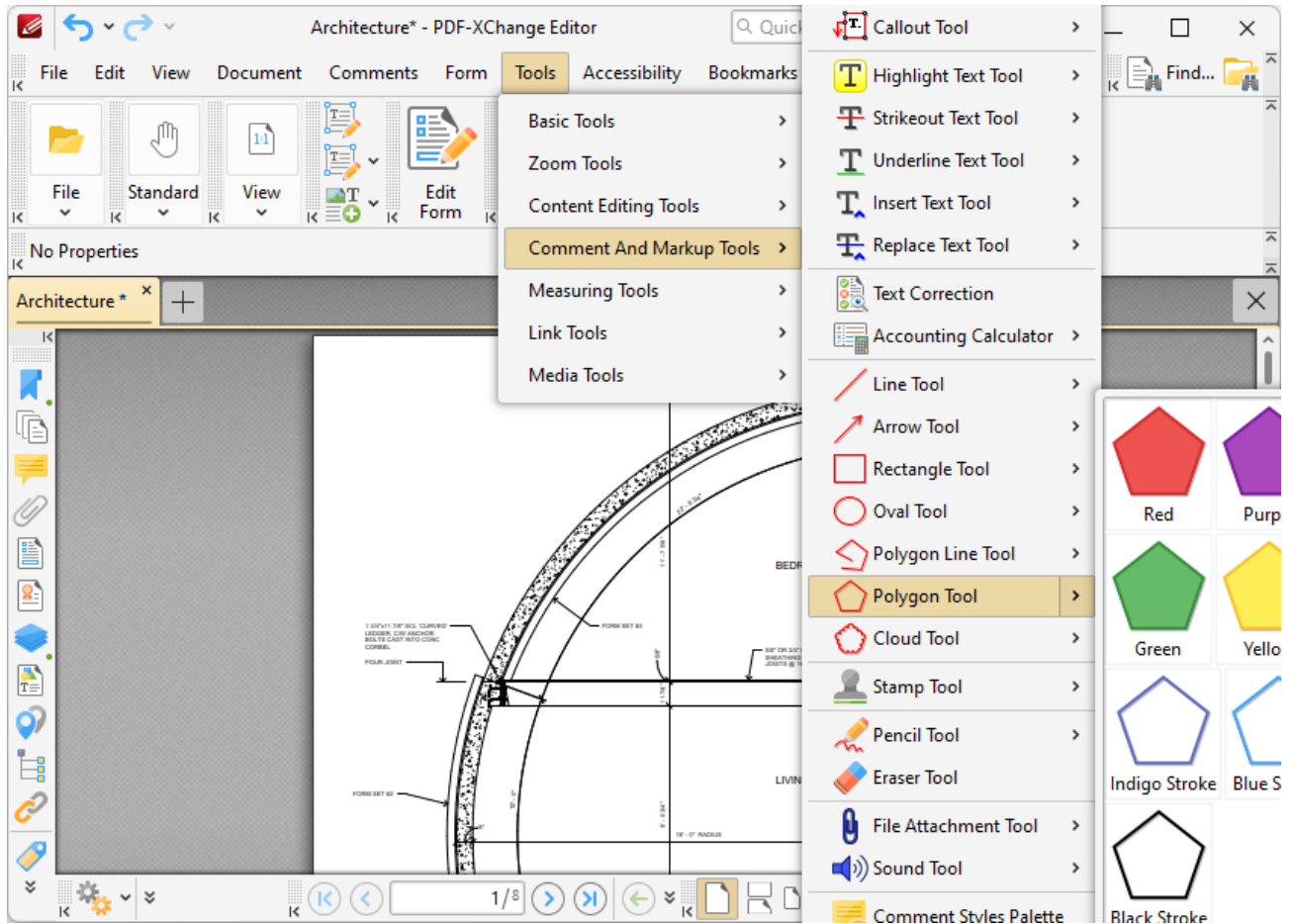
Figure 1. Tools Tab Submenu, Polygon Tool

When the **Polygon Tool** is selected, click to designate the first point of the polygon, then move the pointer to the next location and click to designate the second point. Repeat this process until the final point of the desired shape is reached and then double-click to complete the polygon:
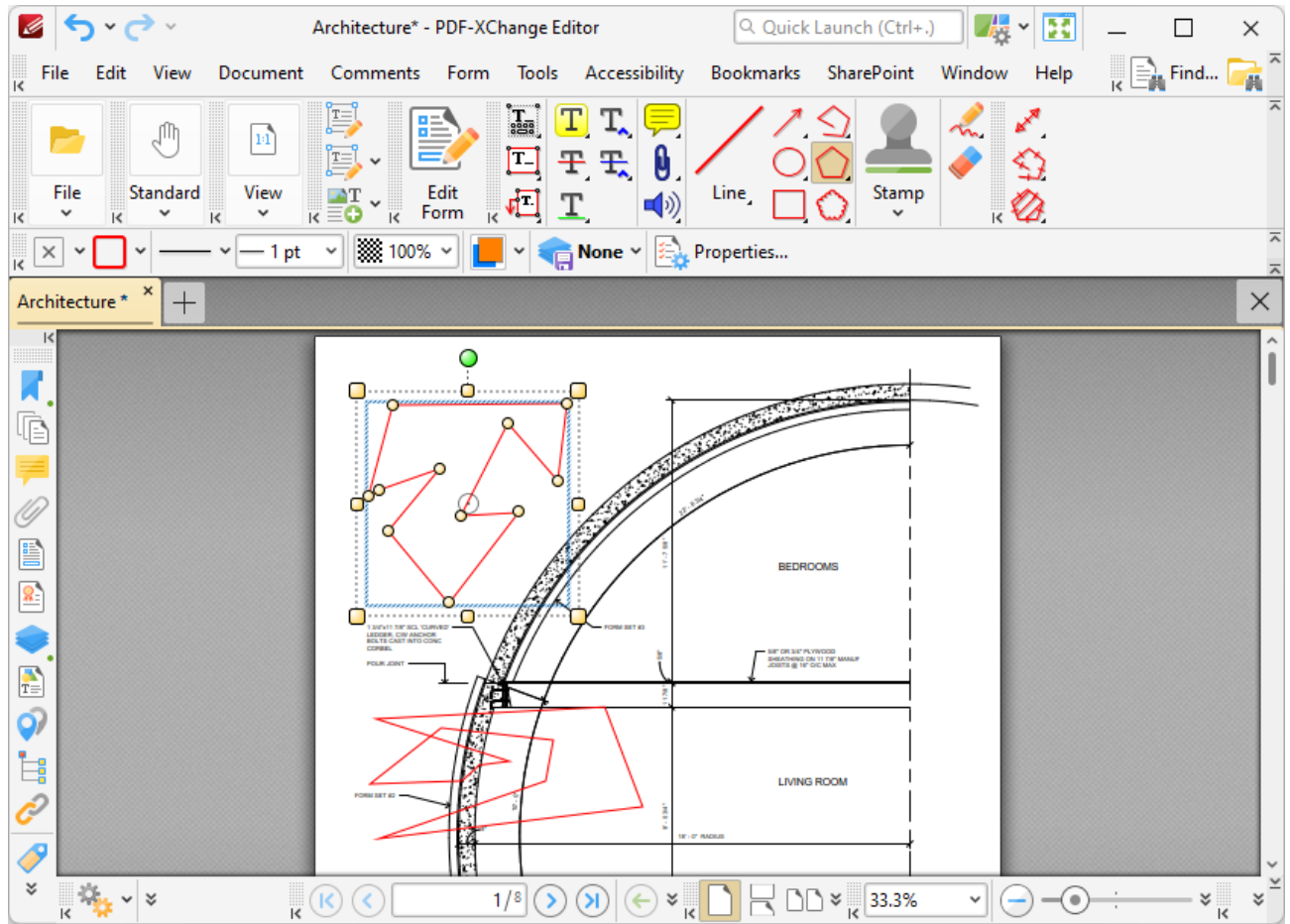
Figure 2. Polygon Tool Examples

The upper polygon has just been placed, which means editing options are enabled:

- Click and drag the outer control points to resize polygons.
- Click and drag the inner control points to reposition them.
- Click and drag polygons to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate polygons. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition polygons. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of polygons.
- Right-click polygons for further options. See **here** 1120 for an explanation of these options.
- When the **Polygon Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the fill color of polygons.
    - **Stroke Color** determines the color of polygon borders.
    - **Border Style** determines the style of polygon borders.
    - **Border Width** determines the width of polygon borders.
    - **Opacity** determines the level of transparency in polygons.

- **Blend Mode** determines how polygons blend with underlying content. These options are explained **here.** ₁₁₀₇
- **Keep Selected** determines whether or not the **Polygon Tool** remains selected after a polygon has been created. If this option is enabled then the tool will remain selected and can be used to create several polygons consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a polygon.
- **Exclusive Mode** simplifies the process of using the **Polygon Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create polygons on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional polygon properties, as detailed below.
- Note that several default styles are available for polygons, as detailed in *(figure 1)*. Click to select alternative annotation styles. The **Comment Styles Palette** ₇₉₁ can be used to save customized polygon styles for subsequent use. Right-click the **Polygon** icon in the **Comment Toolbar** ₃₁₇ to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** ₂₅₀ section of the **Preferences** ₂₂₈ dialog box can be used to view/edit preferences for comments.

Polygon Properties Pane
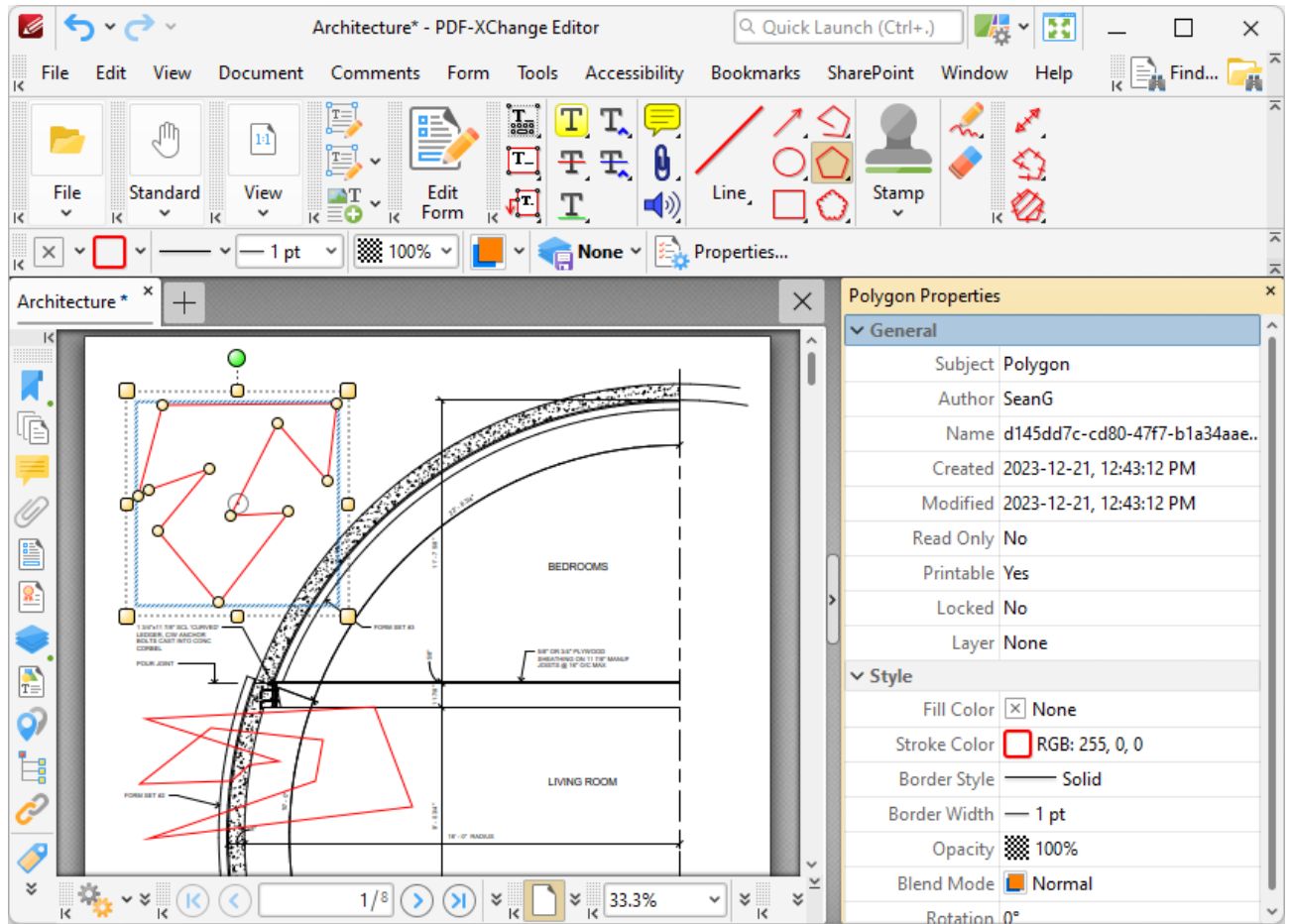
Figure 3. Polygon Properties Pane

- **Subject** is the name of the polygon annotation, as referenced in the **Coments** 519 pane.
- **Author** is the name of the user that created the polygon annotation.
- **Name** is the unique name of the polygon annotation, as referenced within the application.
- **Created** is the date and time at which the polygon annotation was created.
- **Modified** is the date and time at which the polygon annotation was last modified.
- **Read Only** is the read only status of the polygon annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the polygon annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the polygon annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the polygon annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the line ending style used at the start of the polygon annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the polygon annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the polygon annotation.
- **Blend Mode** determines how polygon annotations blend with overlapping content. These options are explained **here.** 1107
- **Rotation** determines the degrees of rotation of the polygon annotation.

Convert Polygon Annotations to Area Annotations

If you want to convert polygon annotations to area annotations, then right-click the polygon annotation and click **Convert to Measurement:**
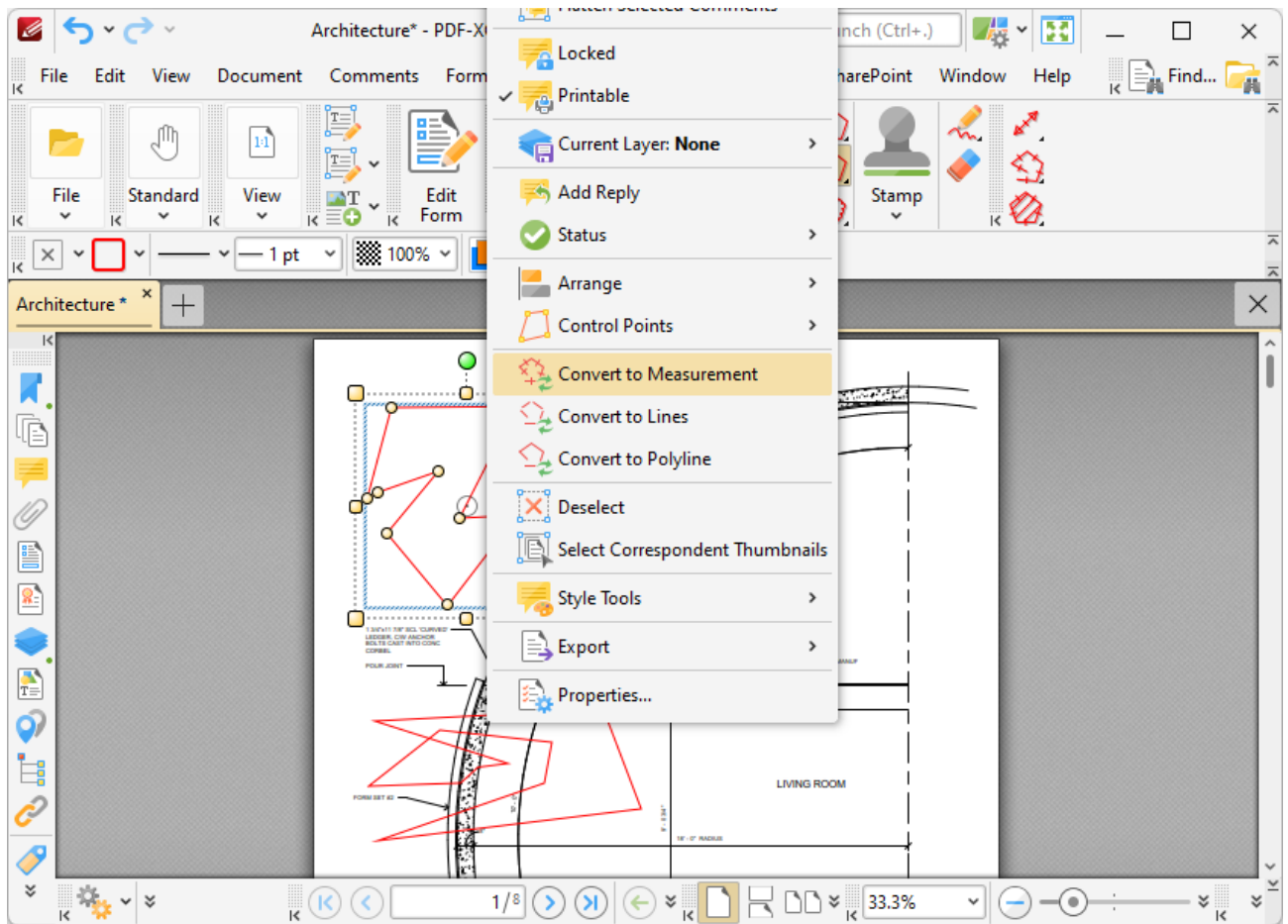
Figure 4. Right-Click Shortcut Menu, Convert to Measurement Highlighted

The polygon annotation will then convert into an area annotation. Note that it is possible to convert multiple annotations at the same time.

Convert Polygon Annotations to Multiple Line Annotations

If you want to convert polygon annotations to multiple line annotations, then right-click the polygon line annotation and click **Convert to Lines:**
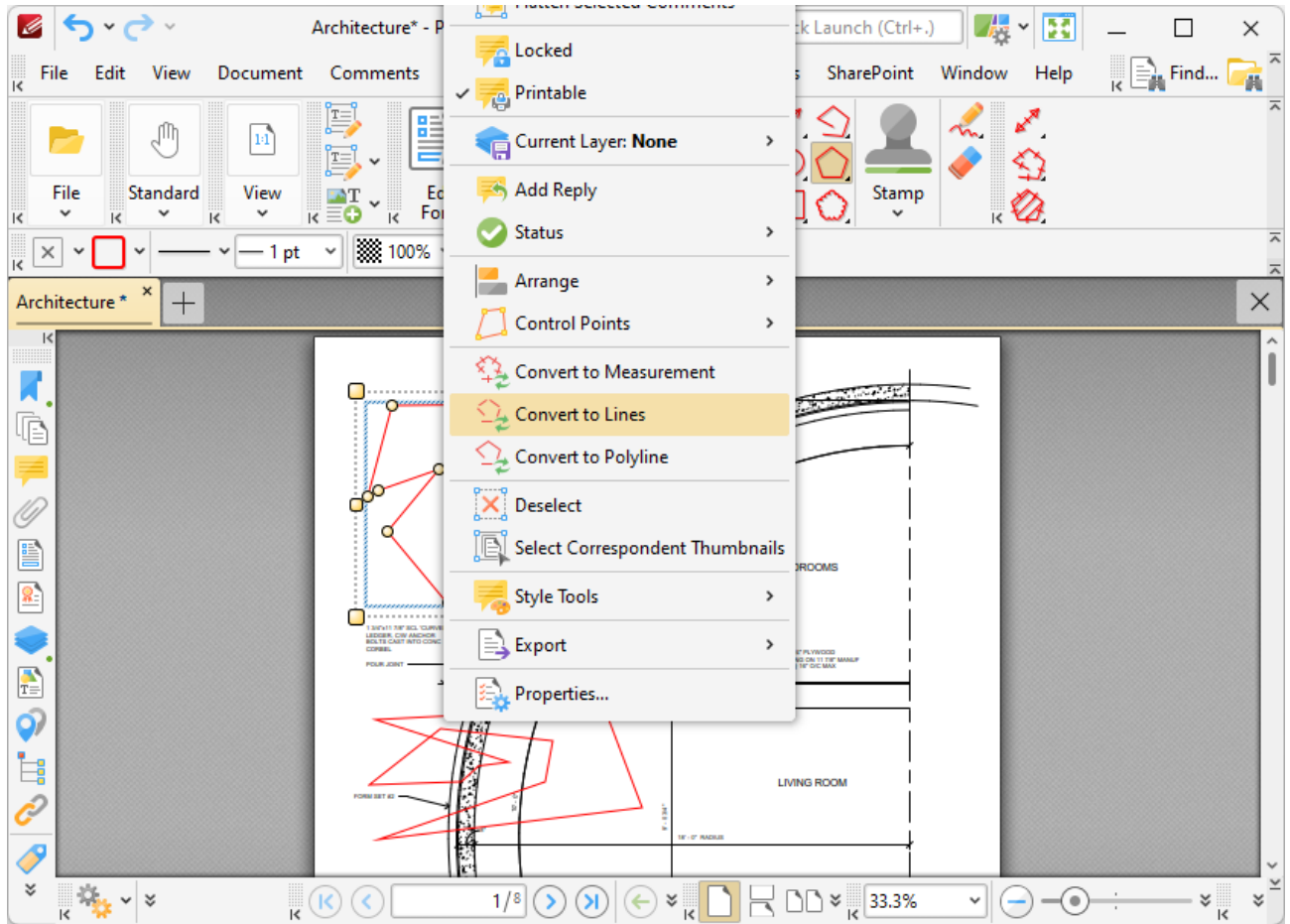
Figure 5. Right-Click Shortcut Menu, Convert to Lines Highlighted

The polygon annotation will then be converted into multiple line annotations that can be edited as separate annotations:
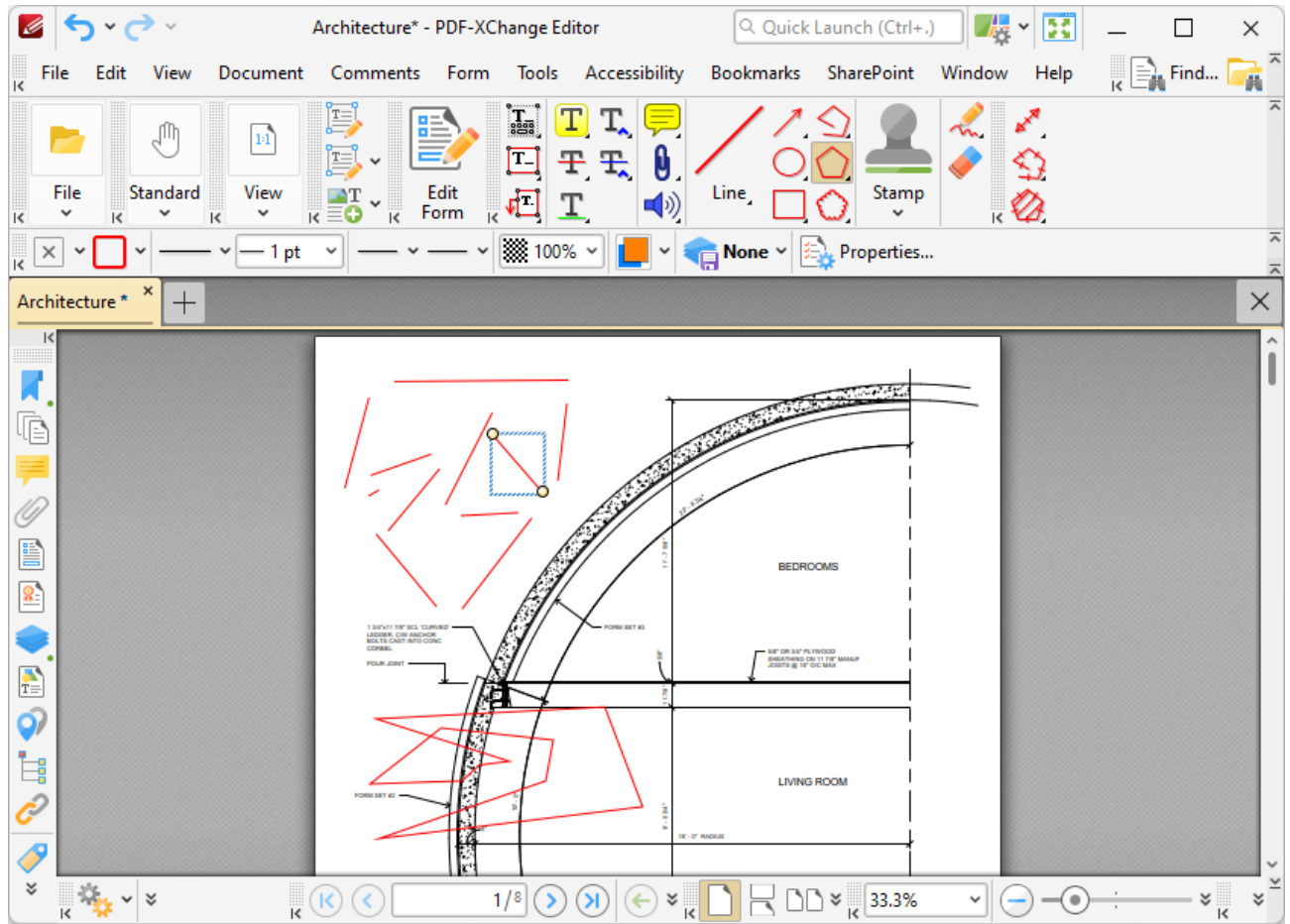
Figure 6. Polygon Annotation Converted into Line Annotations

5.7.4.19 Cloud Tool

Cloud Tool

Click **Cloud Tool** to add cloud annotations to documents:
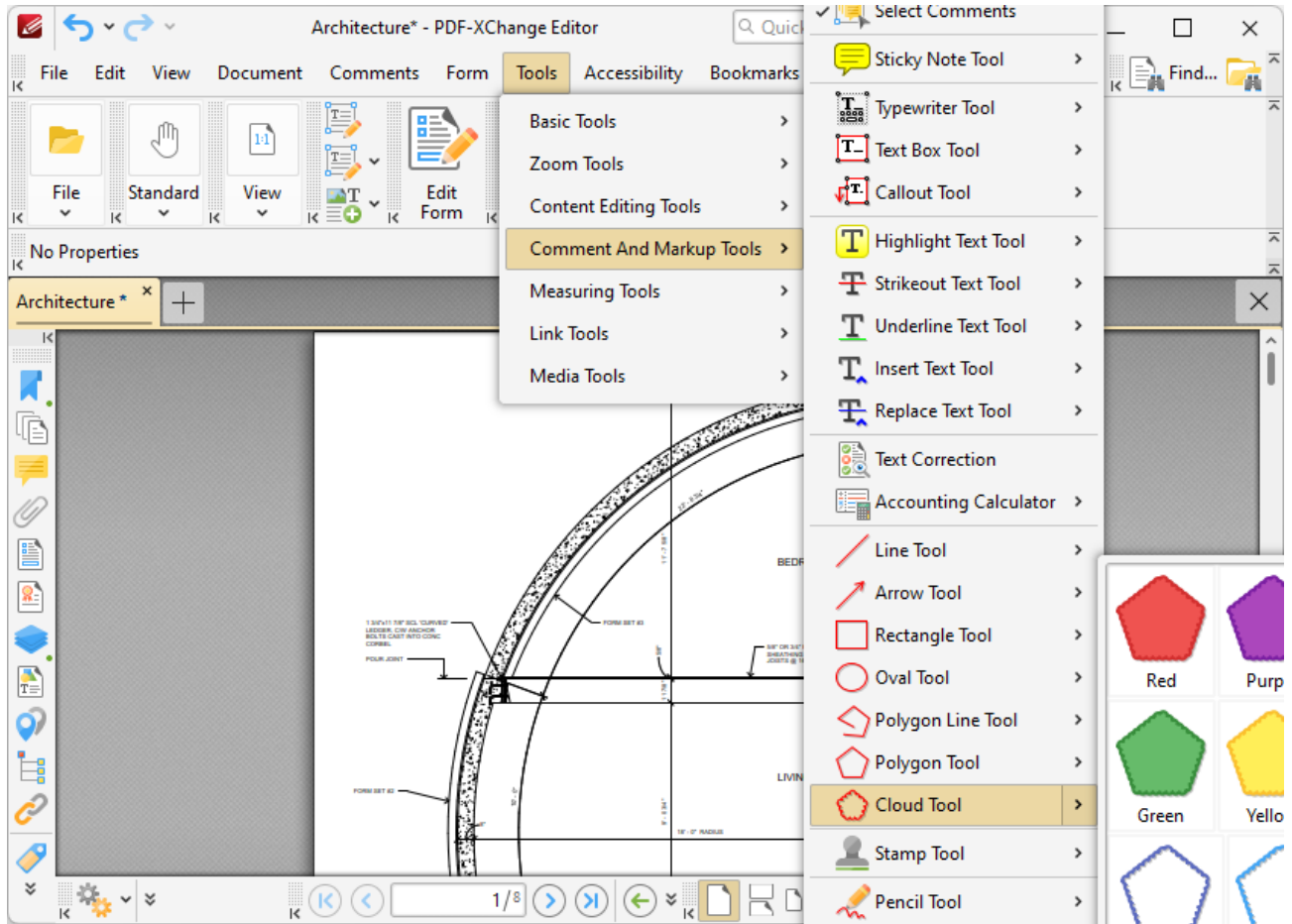
Figure 1. Tools Tab Submenu, Cloud Tool

When the **Cloud Tool** is selected, the pointer becomes a crosshairs icon. Click to designate the starting point of the annotation. Drag the crosshairs to the location at which the first line is to be made. Click again to define the first line of the annotation. Repeat the process until the desired shape is complete and then double-click to define the final point:
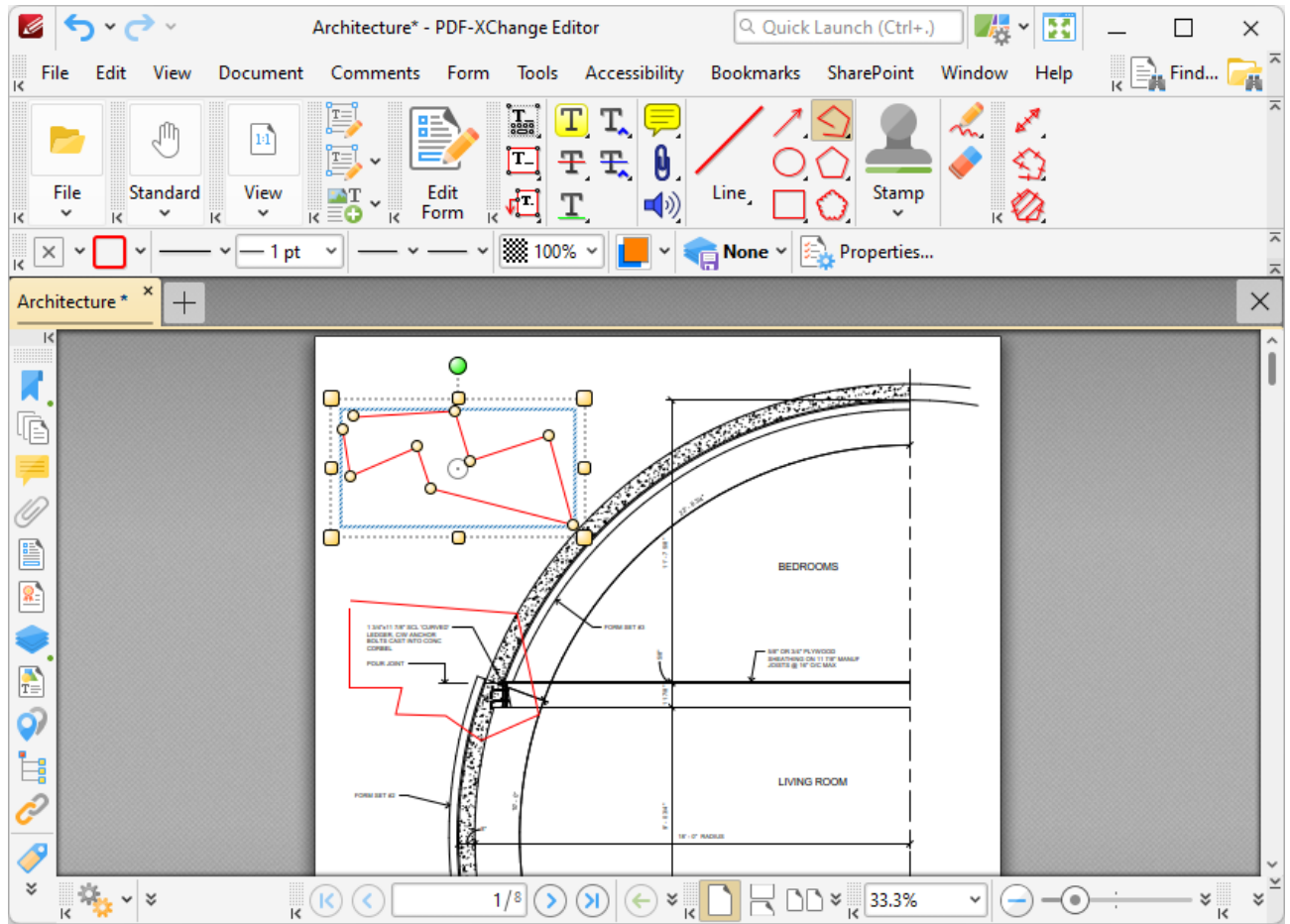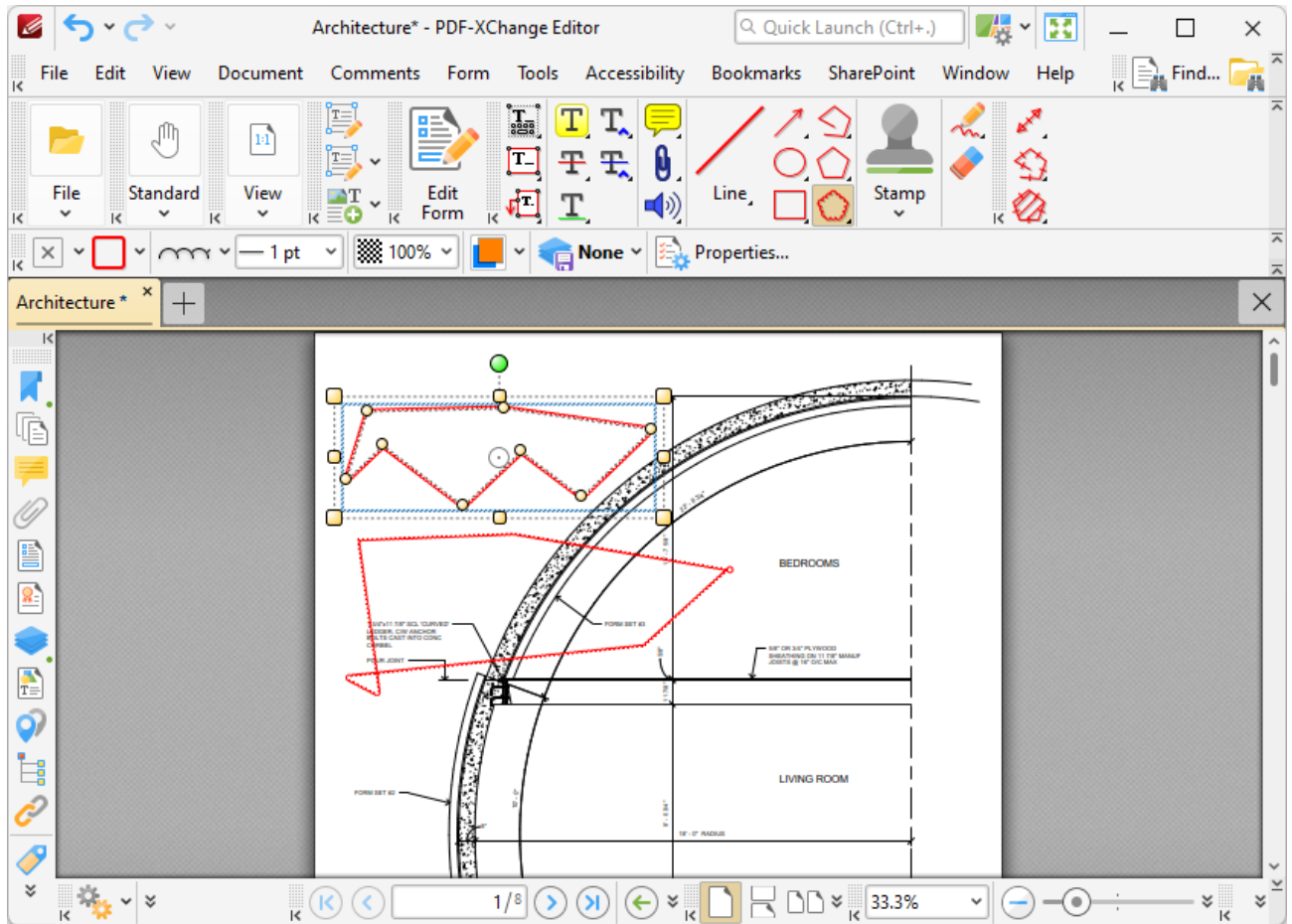
Figure 2. Cloud Tool Example

The upper cloud annotation has just been placed, which means editing options are enabled:

- Click and drag the outer control points to resize cloud annotations.
- Click and drag the inner control points to reposition them.
- Click and drag cloud annotations to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate cloud annotations. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition cloud annotations. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of cloud annotations.
- Right-click cloud annotations for further options. See **here** 1120 for an explanation of these options.
- When the **Cloud Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the fill color of cloud annotations.
    - **Stroke Color** determines the color of cloud annotation borders.
    - **Border Style** determines the style of cloud annotation borders.

- **Border Width** determines the width of cloud annotation borders.
- **Opacity** determines the level of transparency in cloud annotations.
- **Blend Mode** determines how cloud annotations blend with underlying content. These options are explained **here.** ⌐1107⌐
- **Keep Selected** determines whether or not the **Cloud Tool** remains selected after a cloud annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several cloud annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a cloud annotation.
- **Exclusive Mode** simplifies the process of using the **Cloud Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create cloud annotations on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional cloud annotation properties, as detailed below.
- Note that several default styles are available for cloud annotations, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** ⌐791⌐ can be used to save customized cloud annotation styles for subsequent use. Right-click the **Cloud** icon in the **Comment Toolbar** ⌐317⌐ to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** ⌐250⌐ section of the **Preferences** ⌐228⌐ dialog box can be used to view/edit preferences for comments.
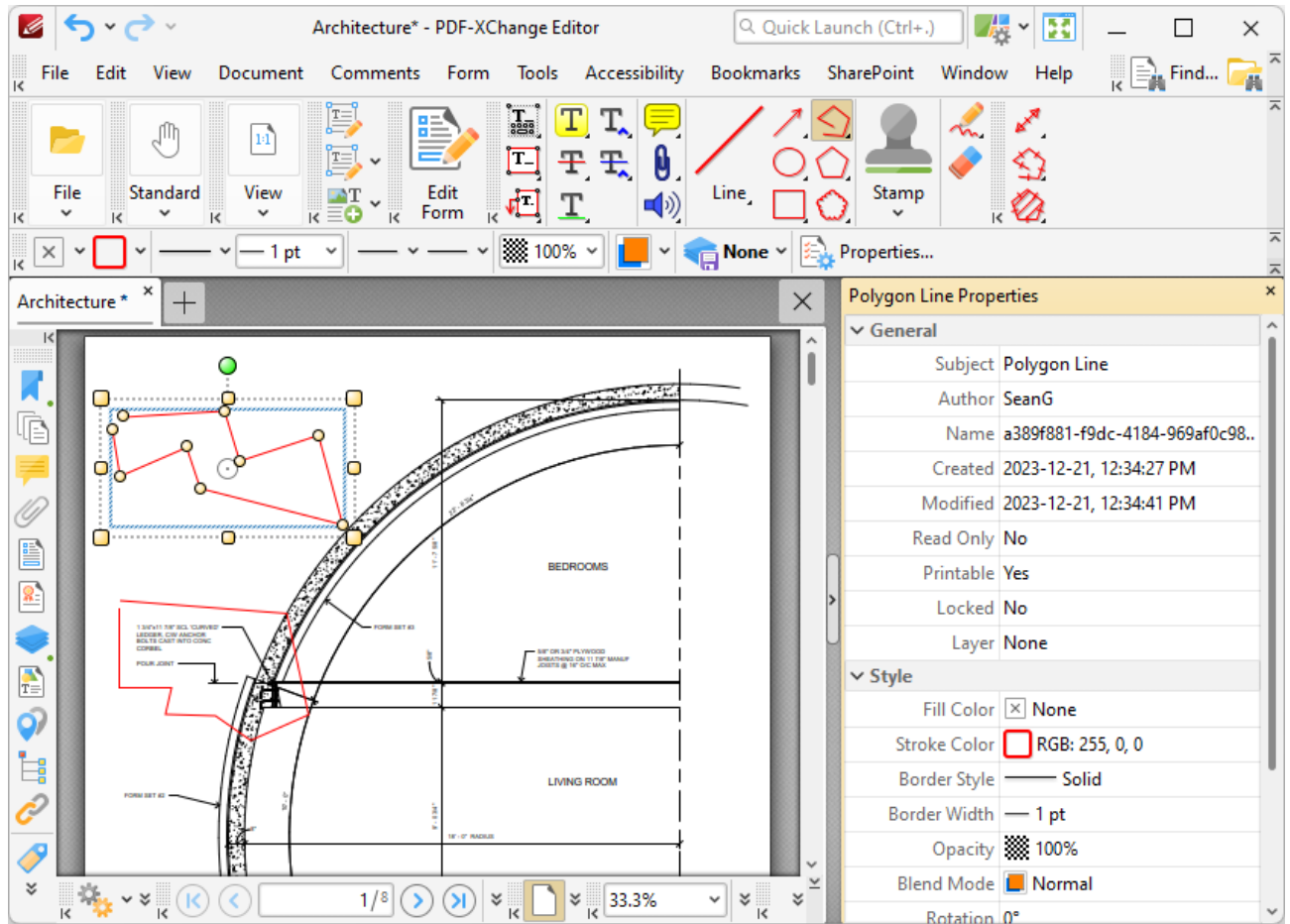
Cloud Properties Pane
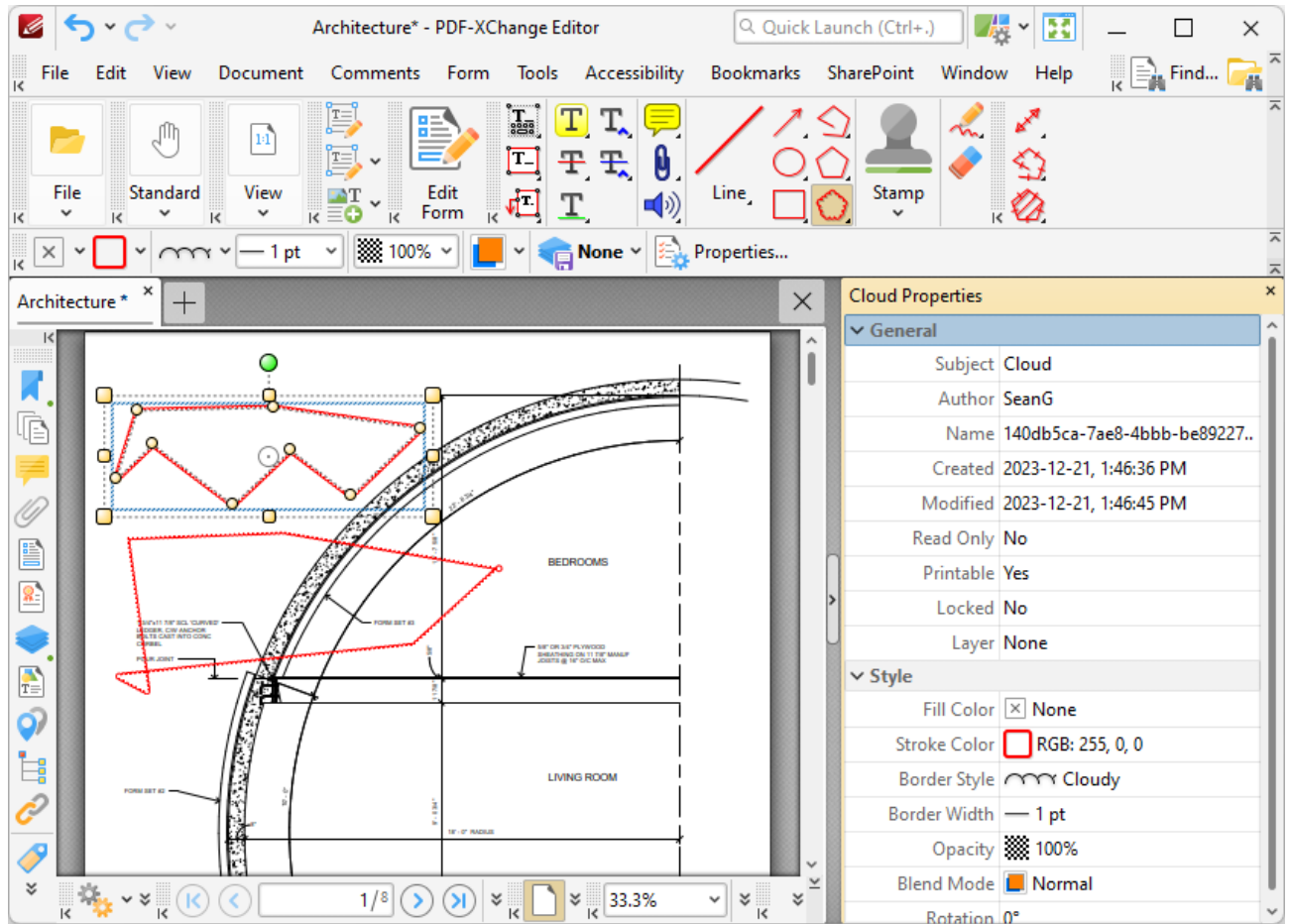
Figure 3. Cloud Properties Pane

- **Subject** is the name of the cloud annotation, as referenced in the **Comments**[519] pane.
- **Author** is the name of the user that created the cloud annotation.
- **Name** is the unique name of the cloud annotation, as referenced within the application.
- **Created** is the date and time at which the cloud annotation was created.
- **Modified** is the date and time at which the cloud annotation was last modified.
- **Read Only** is the read only status of the cloud annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the cloud annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the cloud annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the cloud annotation belongs. Further information about layers is available **here.**[535]
- **Fill Color** determines the color of the line ending style used at the start of the cloud annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the cloud annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the cloud annotation.
- **Blend Mode** determines how cloud annotations blend with overlapping content. These options are explained **here.** [1107]
- **Rotation** determines the degrees of rotation of the cloud annotation.

5.7.4.20 Stamp Tool

Stamp Tool

Click **Stamp Tool** to add stamp annotations to documents:
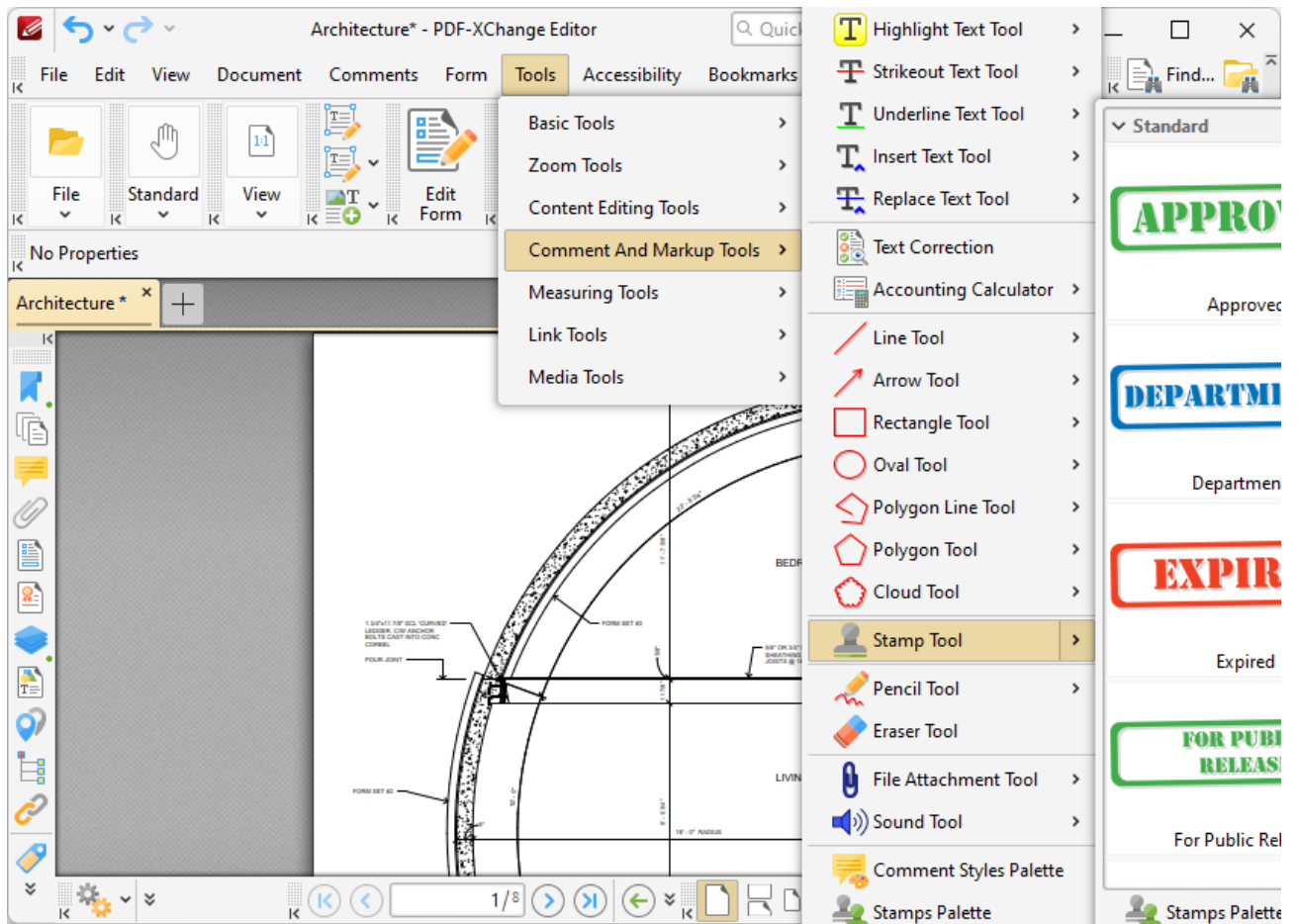
Figure 1. Tools Tab Submenu, Stamp Tool

When the **Stamp Tool** is selected, the active stamp will be displayed beneath the pointer. Move the pointer to the desired location and click to add stamps:
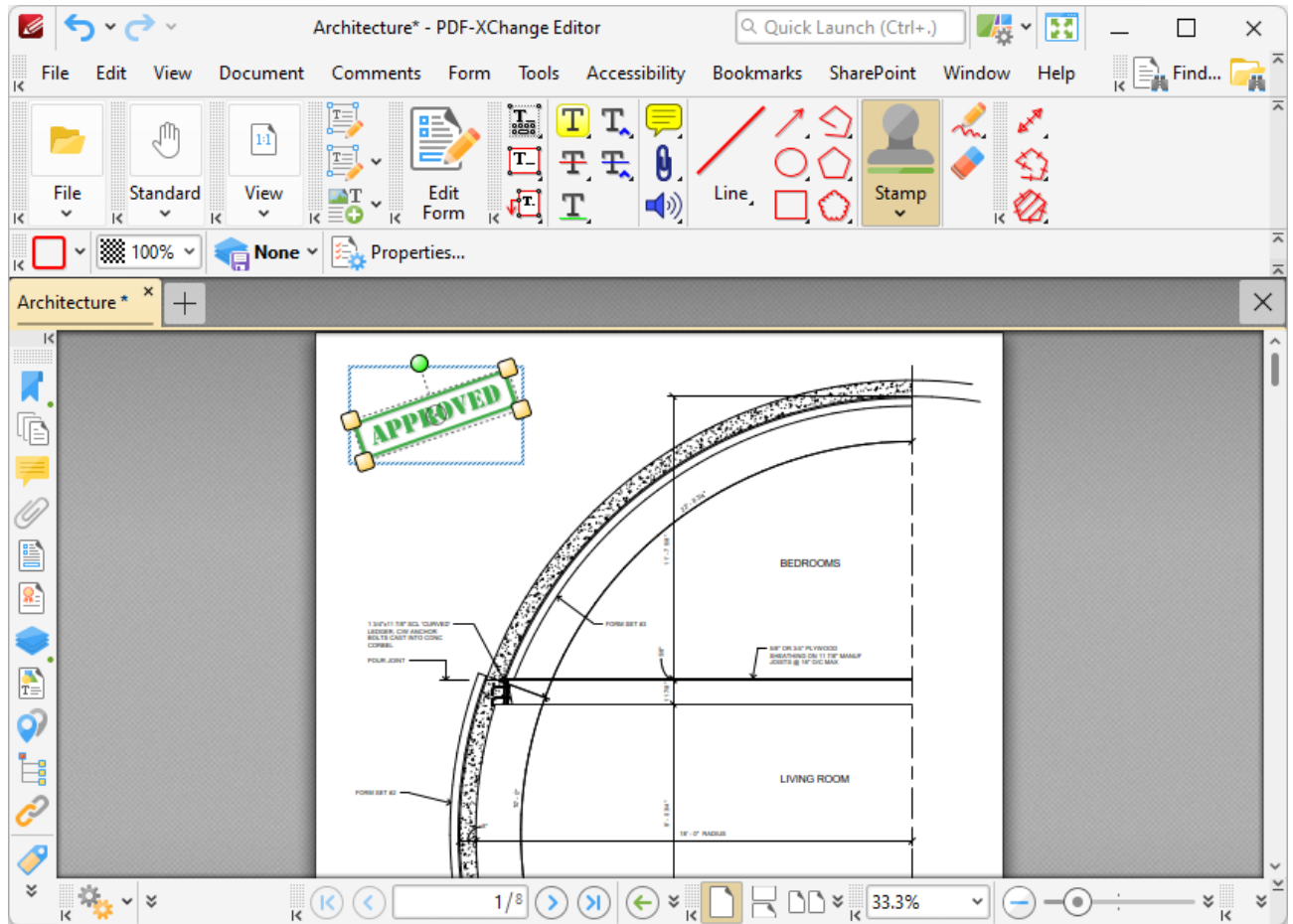
Figure 2. Sample Stamp

- Click and drag the yellow control points to resize stamps. Please note that stamp proportions are constrained.
- Click and drag stamps to reposition them.
- Click and drag the green control point to rotate stamps. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition stamps. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of stamps.
- Right-click stamps for further options. See **here** 1120 for an explanation of these options.
- When the **Stamp Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

    - **Stroke Color** determines the color of pop-up notes associated with stamps. (The color of default stamps is fixed and can only be adjusted after stamps have been flattened. However, new stamps can be created as desired - see below).
    - **Opacity** determines the level of transparency in stamps.
    - **Keep Selected** determines whether or not the **Stamp Tool** remains selected after a stamp has been created. If this option is enabled then the tool will remain selected and can be used to create several stamps consecutively. If this option is not enabled then **PDF-**

XChange Editor will revert to the designated default tool immediately after creating a stamp.

- **Exclusive Mode** simplifies the process of using the **Stamp Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create stamps on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional stamp properties, as detailed below.

- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.
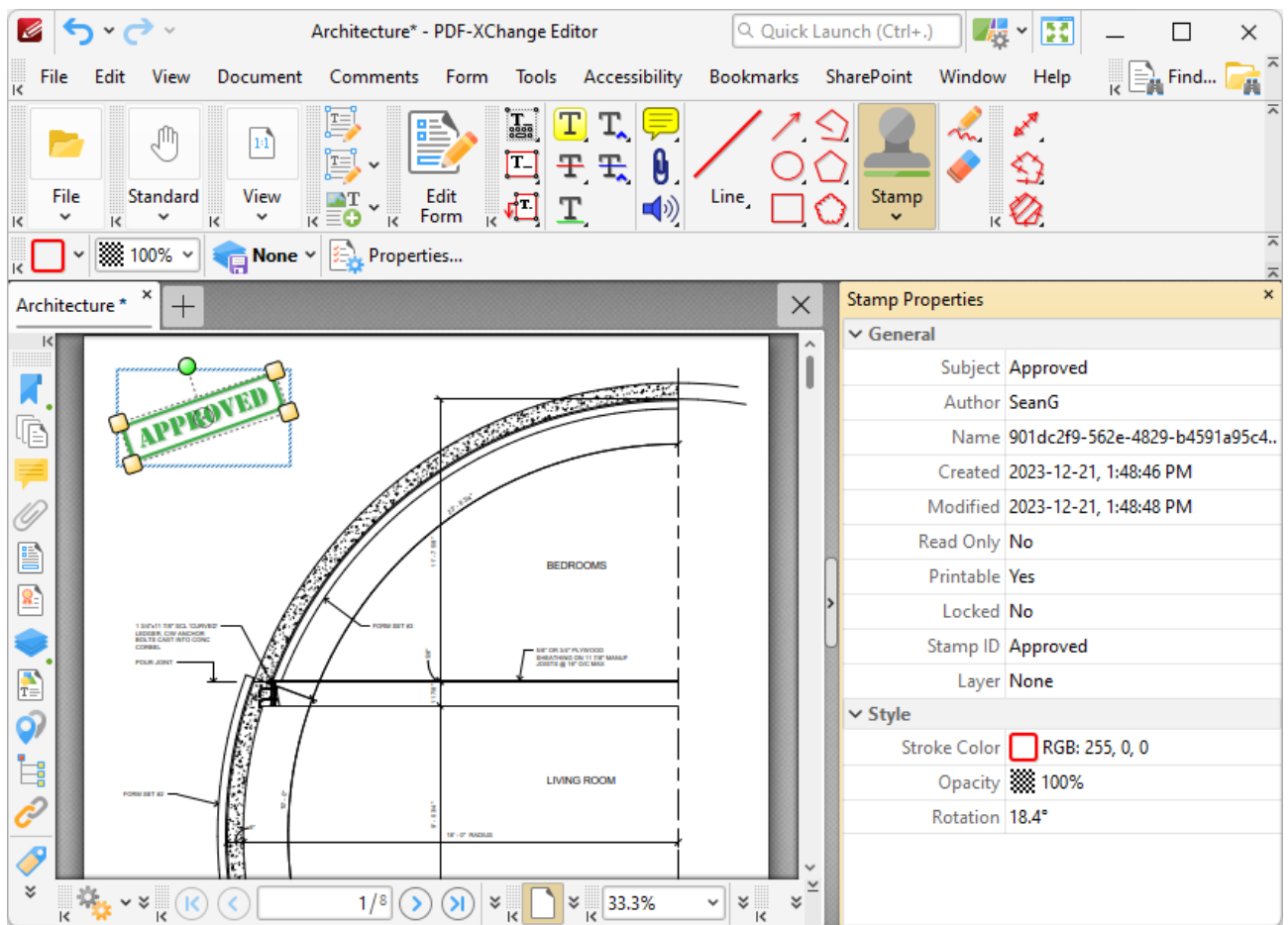
Figure 3. Stamp Properties Pane

- **Subject** is the name of the stamp annotation, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the stamp annotation.
- **Name** is the unique name of the stamp annotation, as referenced within the application.
- **Created** is the date and time at which the stamp annotation was created.
- **Modified** is the date and time at which the stamp annotation was last modified.

- **Read Only** is the read only status of the stamp annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the stamp annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the stamp annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Stamp ID** is the name of the icon used to display the stamp.
- **Layer** specifies the optional content layer to which the stamp annotation belongs. Further information about layers is available **here.** 535
- **Stroke Color** determines the stroke color of the stamp annotation.
- **Border Style** determines the style of the stamp annotation.
- **Border Width** determines the width of the stamp annotation.
- **Opacity** determines the level of transparency in the stamp annotation.
- **Blend Mode** determines how stamp annotations blend with overlapping content. These options are explained **here.** 1107
- **Rotation** determines the degrees of rotation of the stamp annotation.

Click the arrow beneath the **Stamp** icon in the **Shortcut Toolbar** 71 to access the **Stamps** pane, which details all default and custom stamps:

Figure 4. Stamps Pane

- Click to select stamps. They will then be displayed with the pointer. Click again to add stamps to the active document.
- Click **Stamps Palette** to open the **Stamps Palette,** which is a detached version of the **Stamps** pane. The following options are available:
- Click **Options** to determine additional settings for stamps, as detailed in *(figure 5).*
    - Click the **Zoom In** and **Zoom Out** icons to zoom in on/out from available stamps.
    - Click **Add New** for stamp creation options:
        - Click **Add New Stamp from File** to create a stamp from a document saved on the local computer. The **Open Files** dialog box will open. Select a file and click **Open.** The file will be displayed in the **Add New Stamp** dialog box, which is detailed in *(figure 6).*
        - Click **Add Custom Stamp** to add a custom stamp, as detailed below.

- Click **New Stamp from Selection** to create a stamp from selected content in the active document.
- Click **New Stamp from Active Document** to create a new stamp from the active document.
- Click **New Stamp from Clipboard** to create a new stamp from the current clipboard content.
- Click **Rename/Delete** to rename/delete selected stamps. Note that default stamps cannot be renamed/deleted.
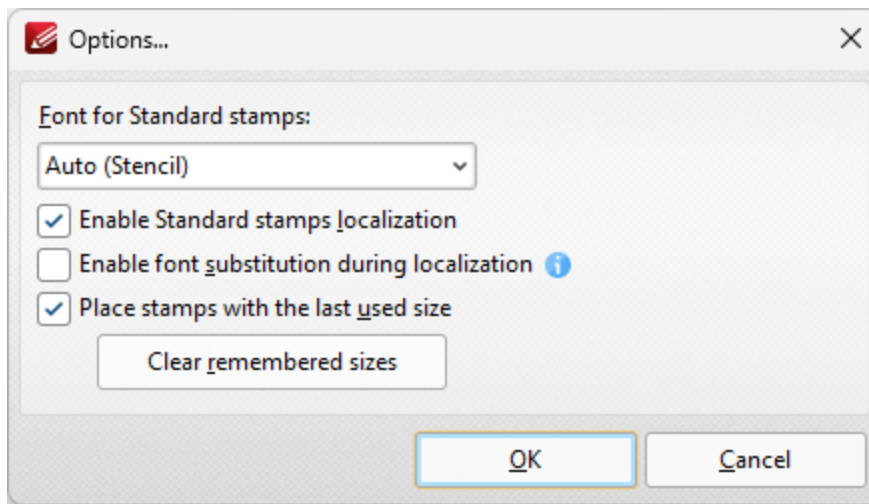
Figure 5. Stamps Options Dialog Box

- Use the **Font** dropdown menu to determine the font used in stamps.
- Select the **Enable Standard stamps localization** to enable localization for standard stamps.
- Select the **Enable font substitution during localization** to enable font substitution when necessary for stamp localization.
- Select the **Place stamps with the last used size** box to retain stamp sizes for subsequent use.
- Click the **Clear remembered sizes** box to clear stamp sizes that **PDF-XChange Editor** has remembered for subsequent use.

Figure 6. Add New Stamp Dialog Box

- Use the **Name** text box, or click the folder icon, to select a file to use as the stamp.
- The **Page 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. See **here** 1274 for further information. Note that if more than one page is selected then a new stamp will be created for each page.
- Enter a name in the **Stamp Title** text box. Click the blue icon to include **macros** 1157 as desired.
- Use the **Target Collection** menu to determine the collection in which the new stamp will be located.
- Click **Add New** to create a new stamp collection.

Click **OK** to create new stamps.

Please note the following:

- Images are usually in raster format and will pixellate if zoomed to a high degree. Therefore it is advisable to create stamps from pre-sized images. (Vector-based images do not experience this issue).
- If a transparent background is desired for stamps then a suitable image format must be used. The formats ***.gif** and ***.png** support transparency but ***.jpg** and ***.pdf** do not. N.b. **Microsoft Paint** does not handle ***.png** transparency well, but most modern graphics programs, such as **GIMP,** are compatible with ***.png** transparency. A free **GIMP** download is available **here.**
- PDF files that contain transparent images/objects without backgrounds (such as scanned signatures) can also be used to create transparent stamps - empty space on the page will be ignored.

Add New Custom Stamps
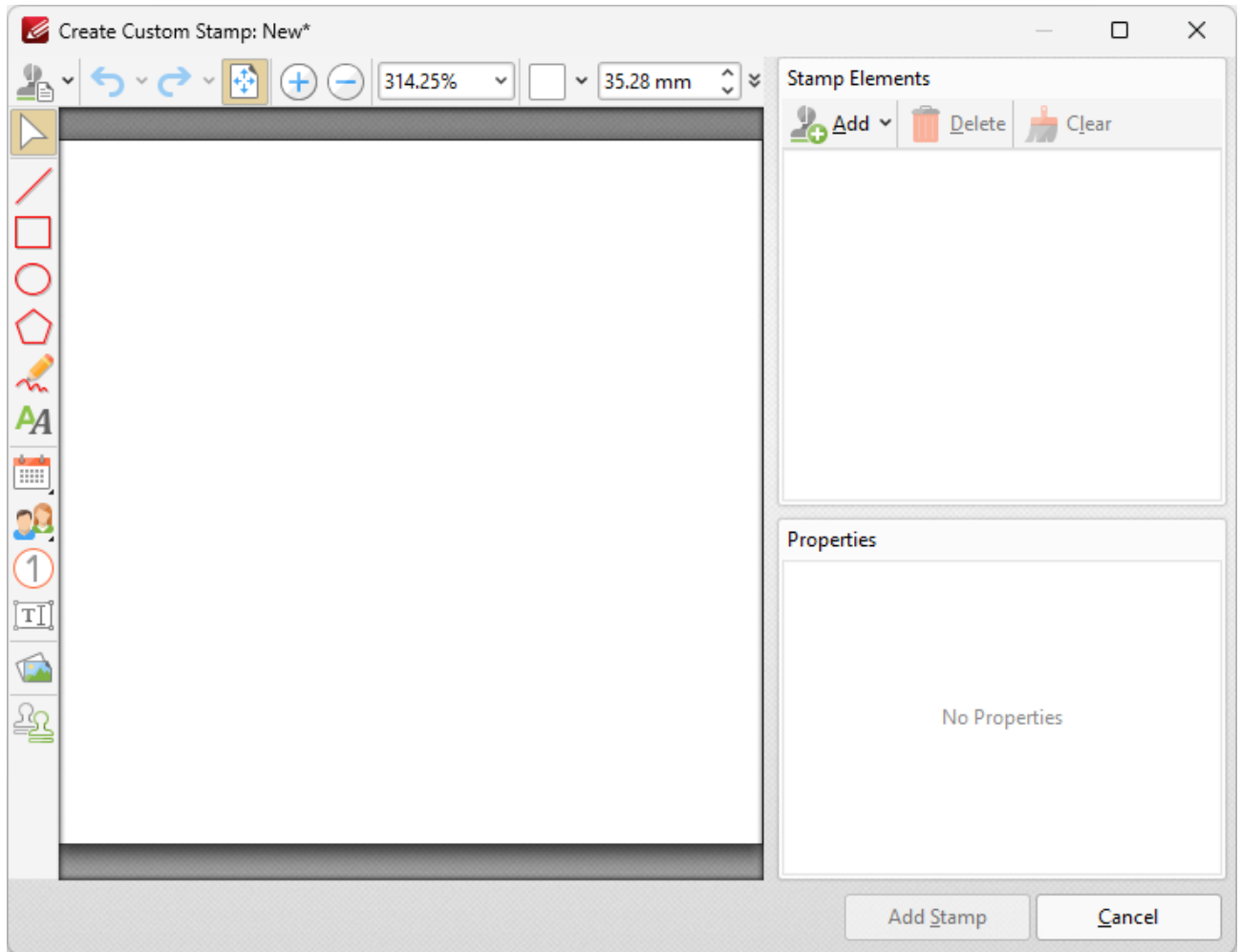
Figure 6. Create Custom Stamp Dialog Box

- Use the icons at the top of the dialog box to perform editing operations on custom stamps:
  - Click **Menu** for menu options:
    - Click **New** to create a new custom stamp.
    - Click **Open Template** to select a custom template to add to the stamp editing area.
    - Click **Recent Templates** to view/select from a list of recently used custom templates.
    - Click **Save** to save the current custom stamp.
    - Click **Save As** to save the current custom stamp with a new name.
    - Click **Crop White Margins** to crop white margins from the stamp.
  - Click **Undo/Redo** to undo/redo editing operations.
  - Click **Fit Page** to set the zoom level so that the page fits the document window.
  - Click **Zoom In/Zoom Out** to zoom in on/out from the document window, or enter the desired zoom level in the **Zoom** number box.
  - Click the **Background Color** box to determine a background color for the stamp.
  - Use the **Width** box to determine the width of the stamp.
- Use the icons on the left side of the dialog box as required:

- Click **Select** to select and interact with content in the document window.
- Click **Line, Rectangle, Oval, Polygon** or **Curve** to add these elements to stamps, then click and drag to add them in the stamp creation window.
- Click **Text** to add text to stamps.
- Click **Date** to add a dynamic date field to stamps. Date fields display the current date when stamps are added to documents.
- Click **Identity** to view identity options for adding content to stamps. Note that **PDF-XChange Editor** will use the identify information defined in the **Identity** 265 preferences for this option:
  - Click **Name** to add a field with your name.
  - Click **Login Name** to add a field with your login name.
  - Click **Email** to add a field with your email.
  - Click **Organization Name** to add a field with you organization name.
- Click **Counter** to add a counter field to stamps, which is a field that contains a number that starts at one and will increase by one each time the stamp is placed. The **Create Counter Field** dialog box will open:
  - Select **Per Document** if you want the counter to count per document, or **Global** if you want the counter to count continually through all documents.
  - Enter a name for counter in the **Counter Name** text box.
  - Use the **Format** dropdown menu to specify the format of the counter used in the field.
- Click **Interactive Field** to add an interactive field to stamps that users can interact with before the stamp is placed. The **Create Interactive Field** dialog box will open:
  - Enter the desired label for the dialog box field in the **Field Label** text box. This text will be displayed in the dialog box that appears when the stamp is added to documents.
  - Enter example field text in the **Example** text box. This text will be displayed as example text for the field in the stamp when it is added to documents.
  - Use the **Type** dropdown menu to specify the creation of a **Text** or **Date** field as desired.
- Click **From File** to add an image from file to the stamp, then click and drag to determine the area in which the image will be placed. The **Open Files** dialog box will open and you can then select the file that you want to use in the stamp.
- Click **From Template** to add a predefined template to stamps. The **Stamps Templates** dialog box will open. Select the desired template and click **OK** to add it to the stamp.
- When you have added stamp content in the document window, you can use the **Stamp Elements** and **Properties** panes to edit stamp content and content properties as desired.

Click **Add Stamp** to add new stamps to the stamps palette.

If **PDF-XChange Editor Plus** has been purchased, then the additional features below are also available:

Add Dynamic Elements to Stamps

Follow the steps below to add JavaScript to stamps:

1. Move to the **Stamps Palette.**

2. Click **Add New Stamp from File:**
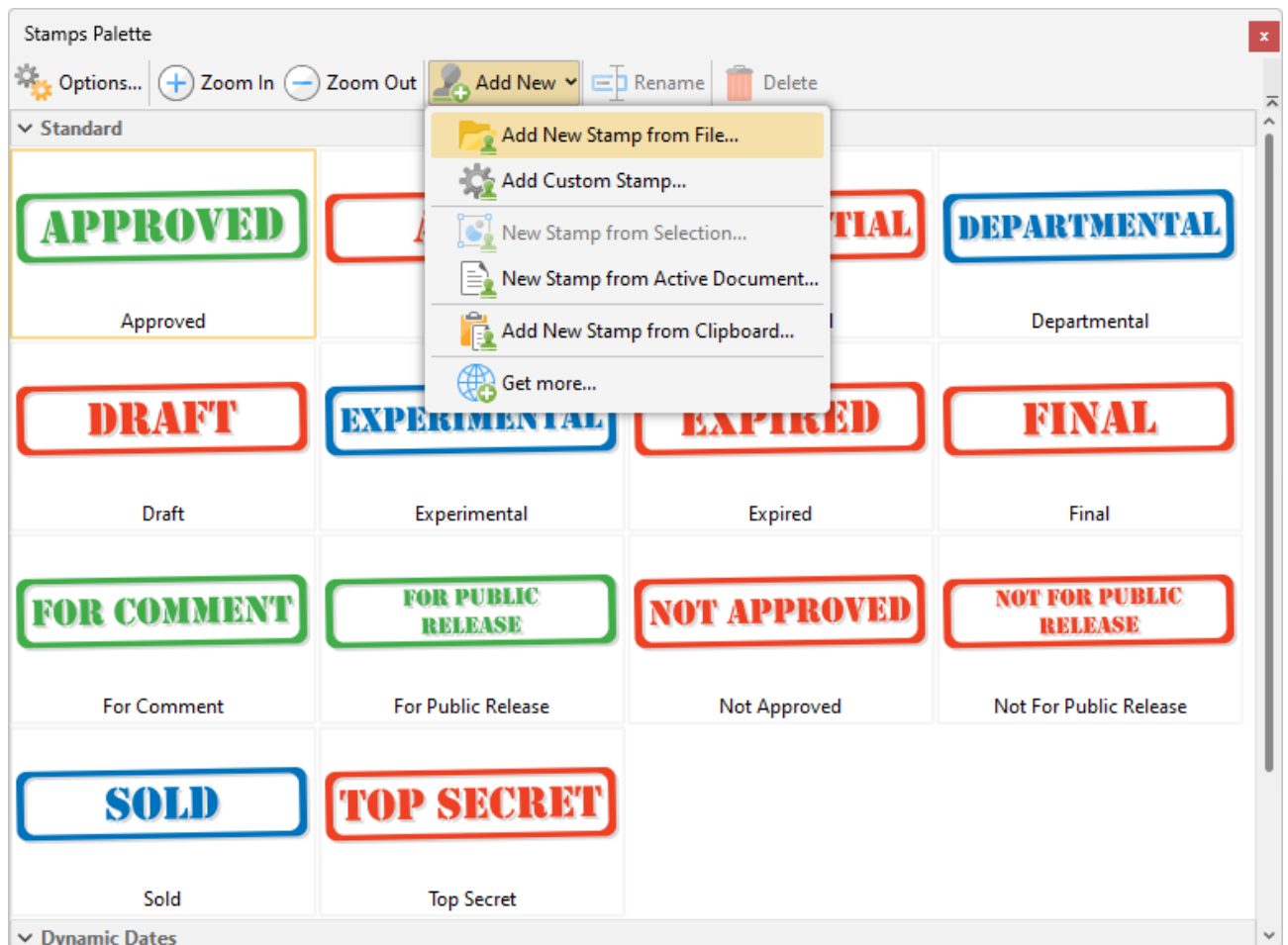
Figure 7. Stamps Palette, Add New Stamp from File

3. Select the desired file, then follow the steps outlined beneath **(figure 5)** to create and save a new stamp.

4. Close **PDF-XChange Editor.**

5. Open the file that contains the stamp. Note that the default folder is **%appdata%\Tracker Software\PDFXEditor\3.0** and all custom stamps are stored in the same file.

6. Move the file to the desktop. (This is a necessary step due to encoding parameters - if it is not included then the changes cannot be saved).

7. Open the file in **PDF-XChange Editor.**

8. Use the **Form Toolbar** 319 to add a text field to the stamp. (If you want the borders of the text field to be invisible then set the stroke color to **None.** The stroke color setting is available in the **Properties Toolbar** 485 when the text field is selected).

9. Click **Select Fields** in the **Form Toolbar,** 319 then right-click the text field and click **Properties** in the submenu. The **Properties** pane will open.

10. Scroll down to the **Value Calculation** property, then select **Custom Action** in the **Calculation** dropdown menu. The property **'Calculate action / Run a JavaScript'** will appear at the bottom of the **Properties** pane:
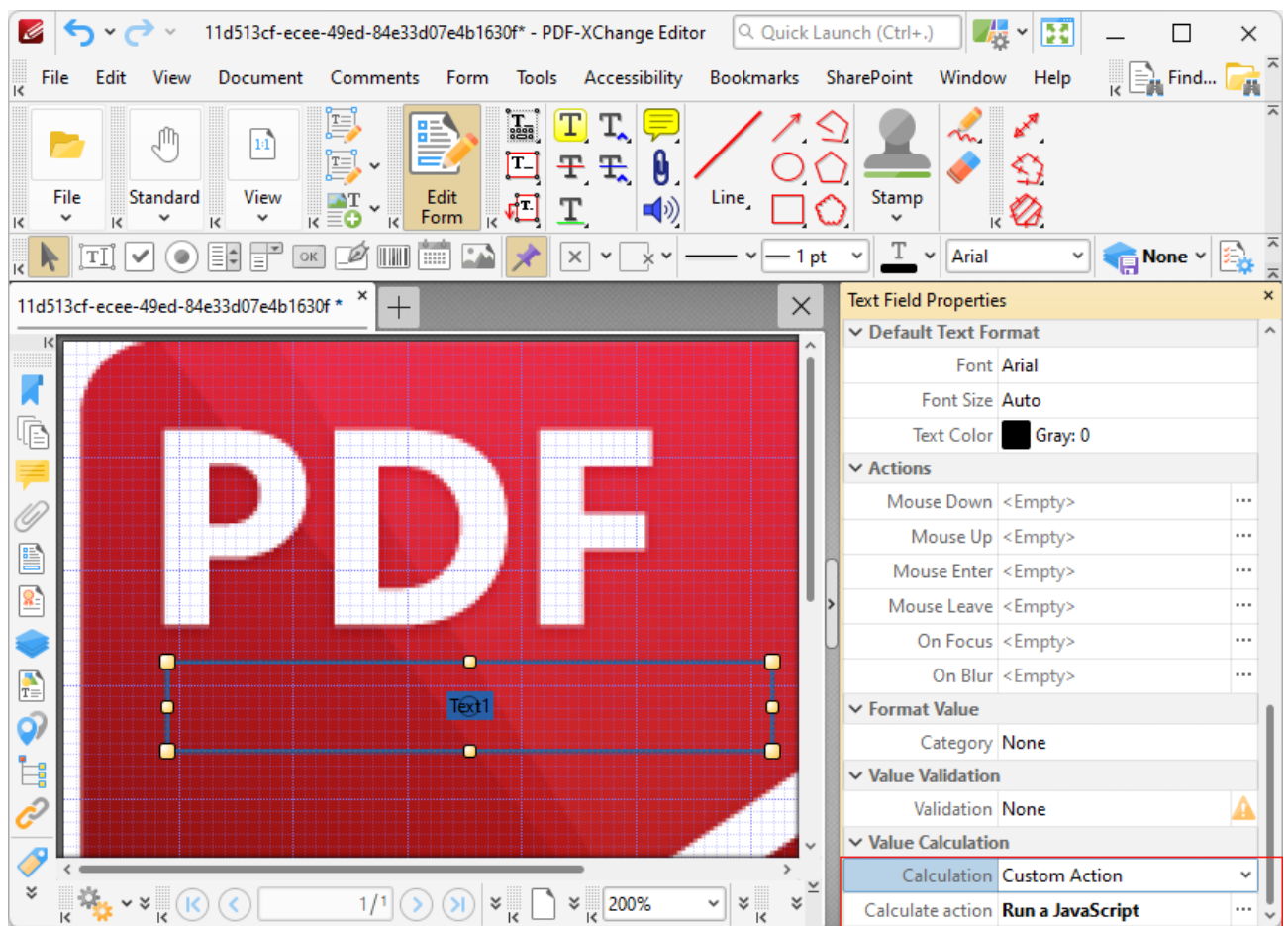
Figure 8. Dynamic Stamp Creation

11. Click the ellipsis icon (three dots) on the right of the **'Calculate action / Run a JavaScript'** property. The **Edit Action: "Run a JavaScript"** dialog box will open.

12. Enter the desired JavaScript and click **OK.**

13. Save the file and close **PDF-XChange Editor.**

14. Return the stamp file to its original destination folder. The updated stamp will then be available in the specified stamp collection.

For example, entering the following JavaScript returns the time and date when the stamp is added to the document:

```
var d = new Date;
event.value = util.printd("yyyy/mm/dd/ HH:MM:ss", d);
```

Please note that form content is evaluated immediately before stamps are placed and flattened immediately afterwards. The software will recognize it as a stamp, as opposed to a form field, despite the fact that it includes form field elements. Note that only the text field and barcode forms are compatible with this process - the other form fields do not retain their functionality.

Add Numbering to Stamps

Follow the steps below to add numbering to stamps:

1. Use the steps detailed above to create a dynamic stamp and enter the following JavaScript at step twelve:

```
if (event.source.forReal && (event.source.stampName == "TCS9kAUOm4Abn56QZCOZE3"))
{
  var counter = 0;
  if (typeof event.source.source.info.stampCounter != undefined)
  {
    counter = event.source.source.info.stampCounter;
  }
  counter++;
  event.source.source.info.stampCounter = counter;
  event.value = counter;
}
else
{
  event.value = 1;
}
```

2. Save the file and close **PDF-XChange Editor.**

3. Return the stamp to its destination folder. (It should have been moved to the desktop at step seven of the process - see steps for adding dynamic elements to stamps, above).

4. Open **PDF-XChange Editor** and create a new document.

5. Place the stamp in the new document and select it.

6. Press Ctrl+J. The **JavaScript Console** will open. Enter the following JavaScript:

this.selectedAnnots[0].AP

7. Click **Run** in the **JavaScript Console.**

8. An alphanumeric string will appear in the lower section of the **JavaScript Console.** Copy this string to the clipboard.

9. Close **PDF-XChange Editor.**

10. Move the stamp from its destination folder to the desktop.

11. Open **PDF-XChange Editor** and open the stamp.

12. Click **Select Fields** in the **Form Toolbar,** ³¹⁹ then select the text field of the stamp.

13. Click **Properties** in the **Edit** tab.

14. Under the **Value Calculation** property, use the menu to select **Custom Action.** The entry **Calculate action / Run a JavaScript** will appear at the bottom of the **Properties** pane.

15. Click the ellipsis icon on the right of the **Calculate action / Run a JavaScript** property. The **Edit Action: "Run a JavaScript"** dialog box will open.

16. Replace the alphanumeric string on line one of the **JavaScript Console** with the alphanumeric string in the clipboard.

17. Save the file and close **PDF-XChange Editor.**

18. Move the file from the desktop to its original folder. The stamp will then feature incremental numbering when it is placed in documents.

A complete list of JavaScript-supported actions is available **here.**

Please note that there are some limitations to the JavaScript functionality available for dynamic stamps. Stamp files do not execute JavaScript in the same manner as PDF files, and functions and variables cannot be defined in a document script. Calculation scripts of the field placed in stamps are the only scripts that are guaranteed to work, and everything that is necessary to execute the script must be present within it in order for it to operate as intended.

5.7.4.21 **Pencil Tool**

Pencil Tool

Click **Pencil Tool** to add pencil annotations to documents:
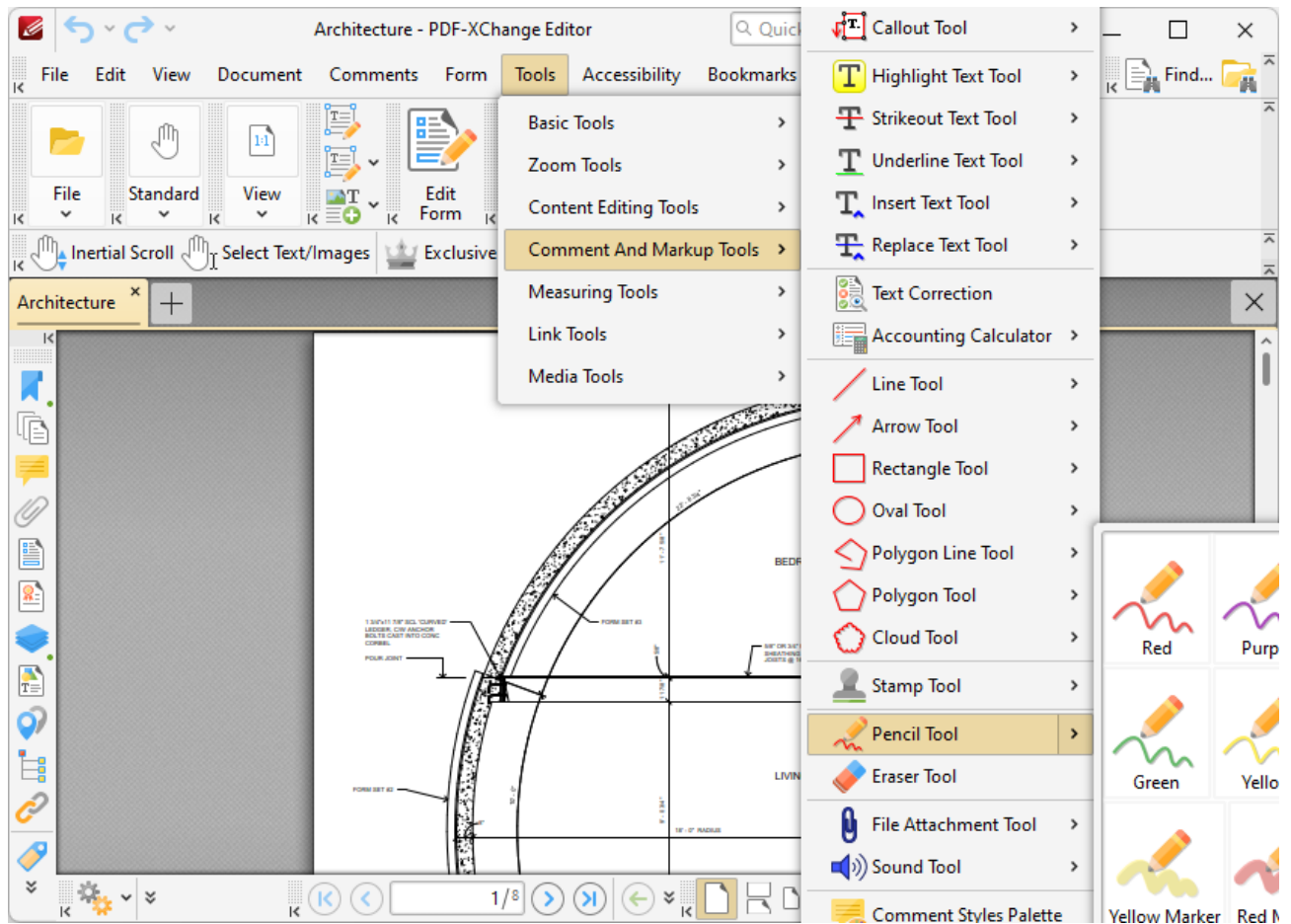
Figure 1. Tools Tab Submenu, Pencil Tool

When the **Pencil Tool** is selected, click and drag the pointer to create pencil annotations:
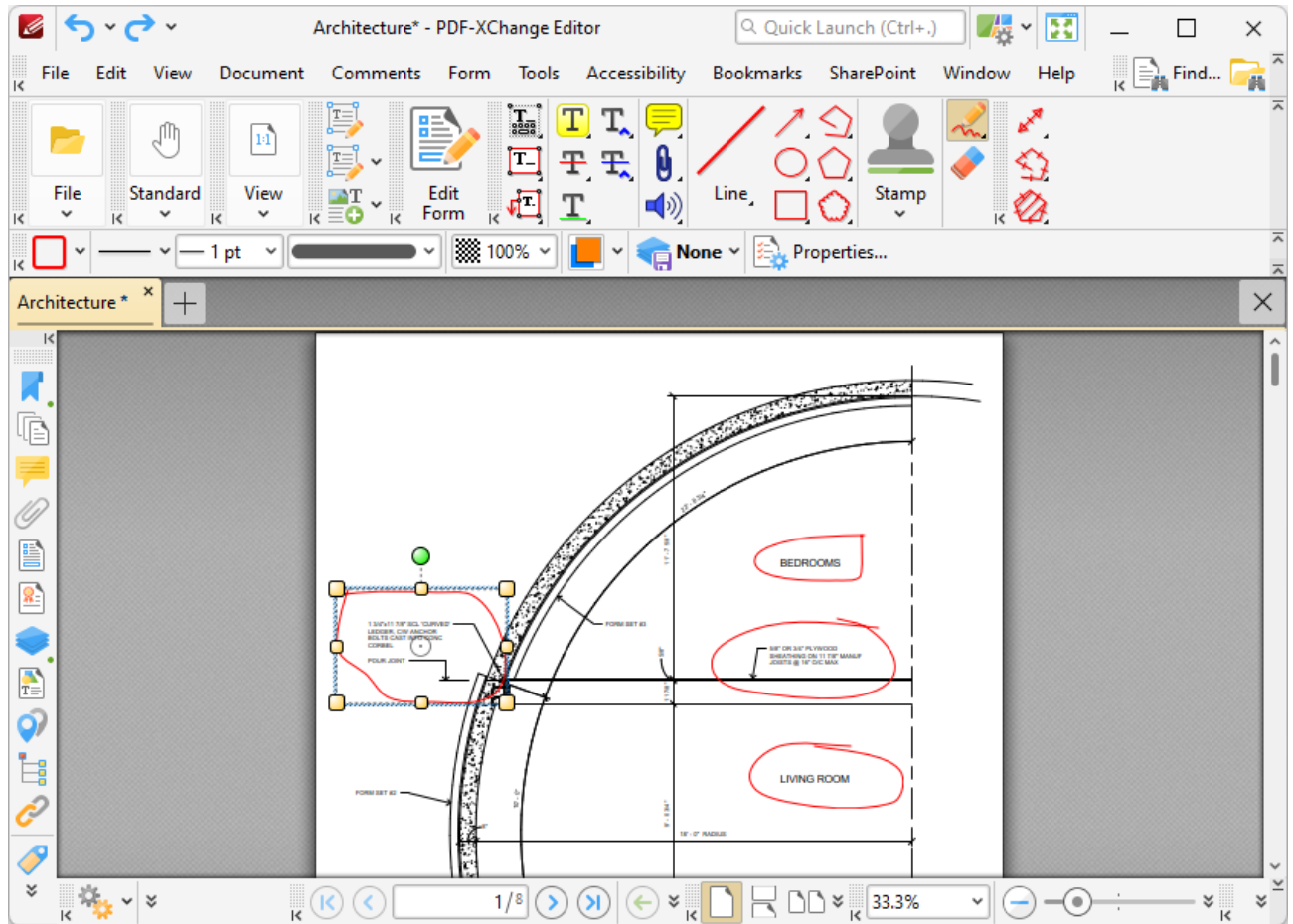
Figure 2. Pencil Tool Example

- Click to select completed pencil annotations, as in the example on the upper left in **(figure 2).** The following options are then available:
- Click and drag the control points to resize pencil annotations.
- Click and drag pencil annotations to reposition them. The circle at the center can also be used for this purpose.
- Click and drag the green control point at the top to rotate pencil annotations. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition pencil annotations. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of document content.
- Right-click pencil annotations for further options. See **here** 1120 for an explanation of these options.
- When the **Pencil Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Stroke Color** determines the color of pencil annotations.
    - **Border Style** determines the style of pencil annotations.
    - **Border Width** determines the width of pencil annotations.
    - **Line Width Profile** determines the profile used for pencil annotations.

- **Opacity** determines the level of transparency in pencil annotations.
- **Blend Mode** determines how pencil annotations blend with underlying content. These options are explained **here.** 1107
- **Keep Selected** determines whether or not the **Pencil Tool** remains selected after a pencil annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several pencil annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a pencil annotation.
- **Exclusive Mode** simplifies the process of using the **Pencil Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create pencil annotations on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional pencil annotation properties, as detailed below.
- Note that several default styles are available for pencil annotations, as detailed in *(figure 1)*. Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized pencil styles for subsequent use. Right-click the **Pencil** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

Pencil Properties Pane

Figure 3. Pencil Properties Pane

- **Subject** is the name of the pencil annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the pencil annotation.
- **Name** is the unique name of the pencil annotation, as referenced within the application.
- **Created** is the date and time at which the pencil annotation was created.
- **Modified** is the date and time at which the pencil annotation was last modified.
- **Read Only** is the read only status of the pencil annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the pencil annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the pencil annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the pencil annotation belongs. Further information about layers is available **here.** [535]
- **Stroke Color** determines the color of the pencil annotation.
- **Border Style** determines the style of the annotation.

- **Border Width** determines the width of the annotation.
- **Width Profile** determines the profile used for the annotation.
- **Opacity** determines the level of transparency in the pencil annotation.
- **Blend Mode** determines how pencil annotations blend with overlapping content. These options are explained **here.** 1107
- **Rotation** determines the degrees of rotation of the pencil annotation.

Eraser Tool

The **Eraser Tool** is used to erase pencil lines. When it is enabled the pointer becomes a white circle. Move the circle to the section of the pencil line to be erased and click to erase. Alternatively, click and drag the pointer to erase content continuously. When the eraser tool is enabled the following options are available in the **Properties Toolbar:** 485

- **Diameter** determines the diameter of the eraser.
- **Keep Selected** determines whether or not the **Eraser Tool** remains selected after a single use. If this option is enabled then the tool will remain selected and can be used several times consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after a single use of the tool.
- Click **Properties** to view/edit the **Eraser Tool Properties** pane. See **here** 1292 for information on tool properties.

5.7.4.22 File Attachment Tool

File Attachment Tool

Click **File Attachment Tool** to embed files into documents and insert an icon that links to the embedded content:
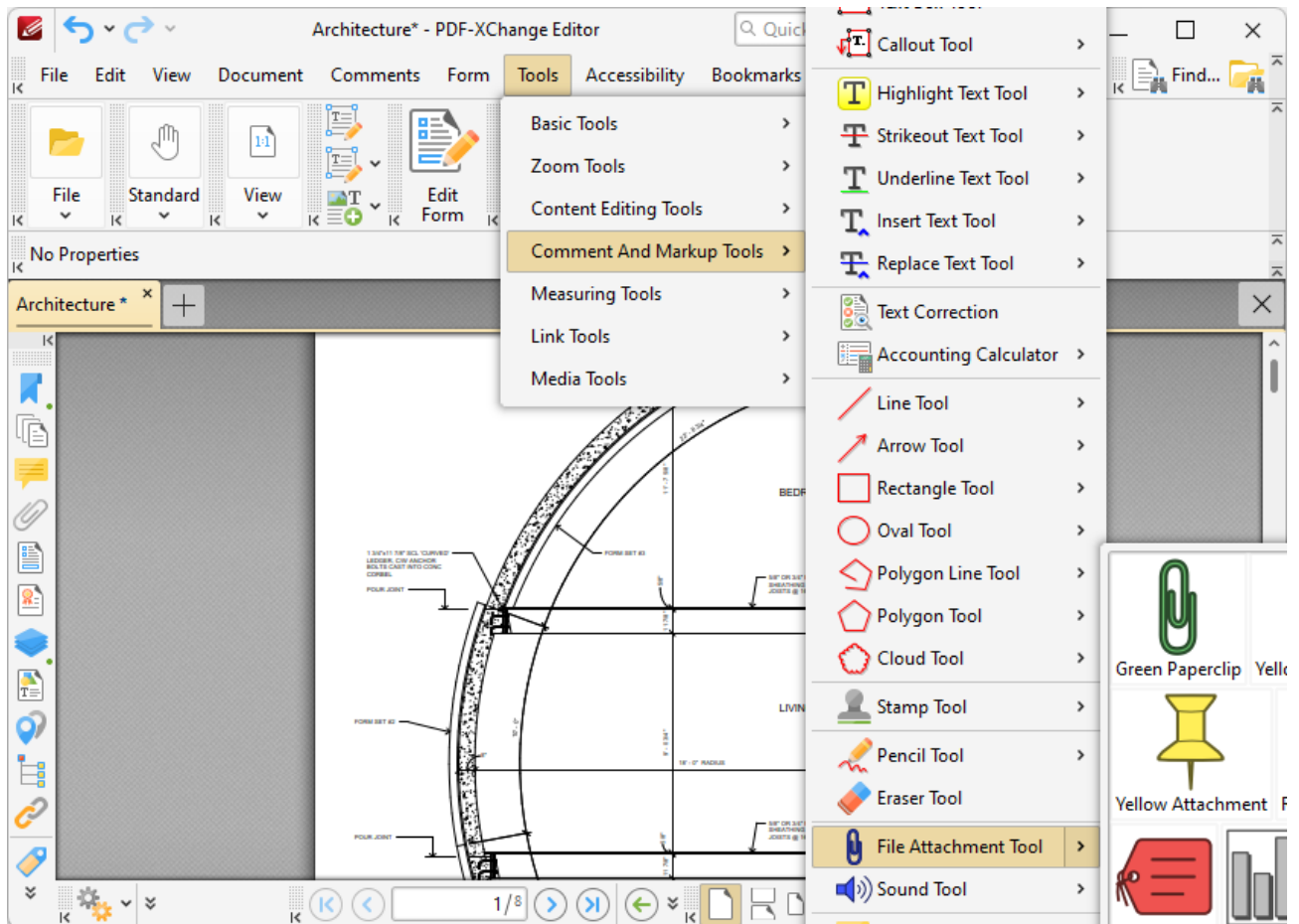
Figure 1. Tools Tab Submenu, File Attachment Tool

When the **File Attachment Tool** is selected, the pointer is replaced with a crosshairs icon. Move the crosshairs to the desired location and click to create the link. The **Open Files** dialog box will open. Select the desired file and click **Open.** The link to the embedded file will then appear in the document:
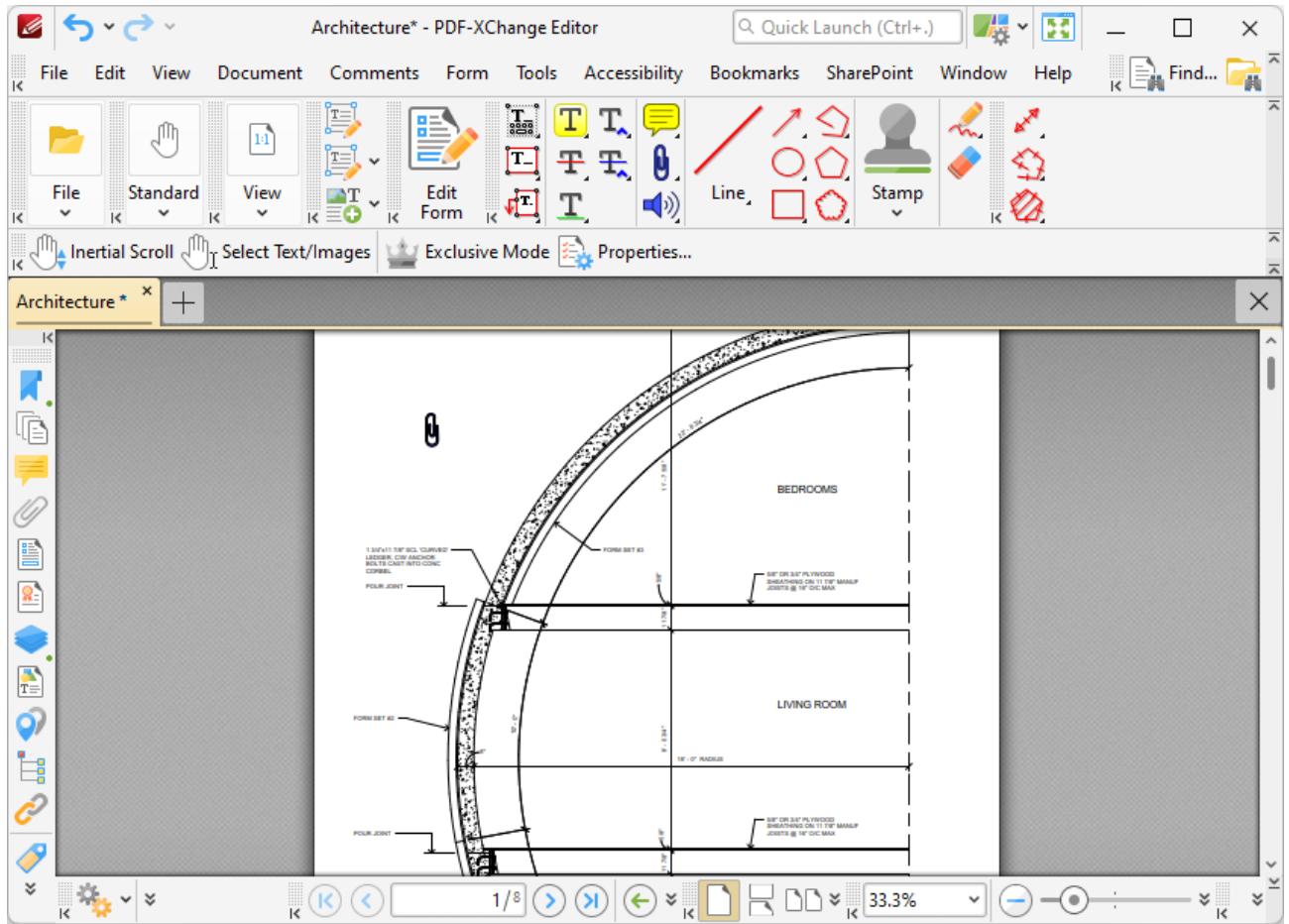
Figure 2. File Attachment Tool Example

- Click and drag the file attachment icon to reposition it. Alternatively, the arrow keys can be used for this purpose. Hold down Shift to move at an increased increment when using the arrow keys.
- Double-click the file attachment icon to open the attached file.
- Right-click file attachment icons for further options. See **here** 1120 for an explanation of these options.
- When the **File Attachment Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Fill Color** determines the file attachment icon color.
    - **Icon** determines the file attachment icon used for the tool.
    - **Opacity** determines the level of transparency in the file attachment icon.
    - **Keep Selected** determines whether or not the **File Attachment Tool** remains selected after a file attachment is created. If this option is enabled then the tool will remain selected and can be used to create several file attachments consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a file attachment.
    - **Exclusive Mode** simplifies the process of using the **File Attachment Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents

other than base content. This makes it possible to create file attachments on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.

- Click **Properties** to view/edit additional file attachment annotation properties, as detailed below.
- Note that several default styles are available for file attachment icons, as detailed in *(figure 1)*. Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized file attachment icon styles for subsequent use. Right-click the **File Attachment** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** 250 section of the **Preferences** 228 dialog box can be used to view/edit preferences for comments.

File Attachment Properties Pane
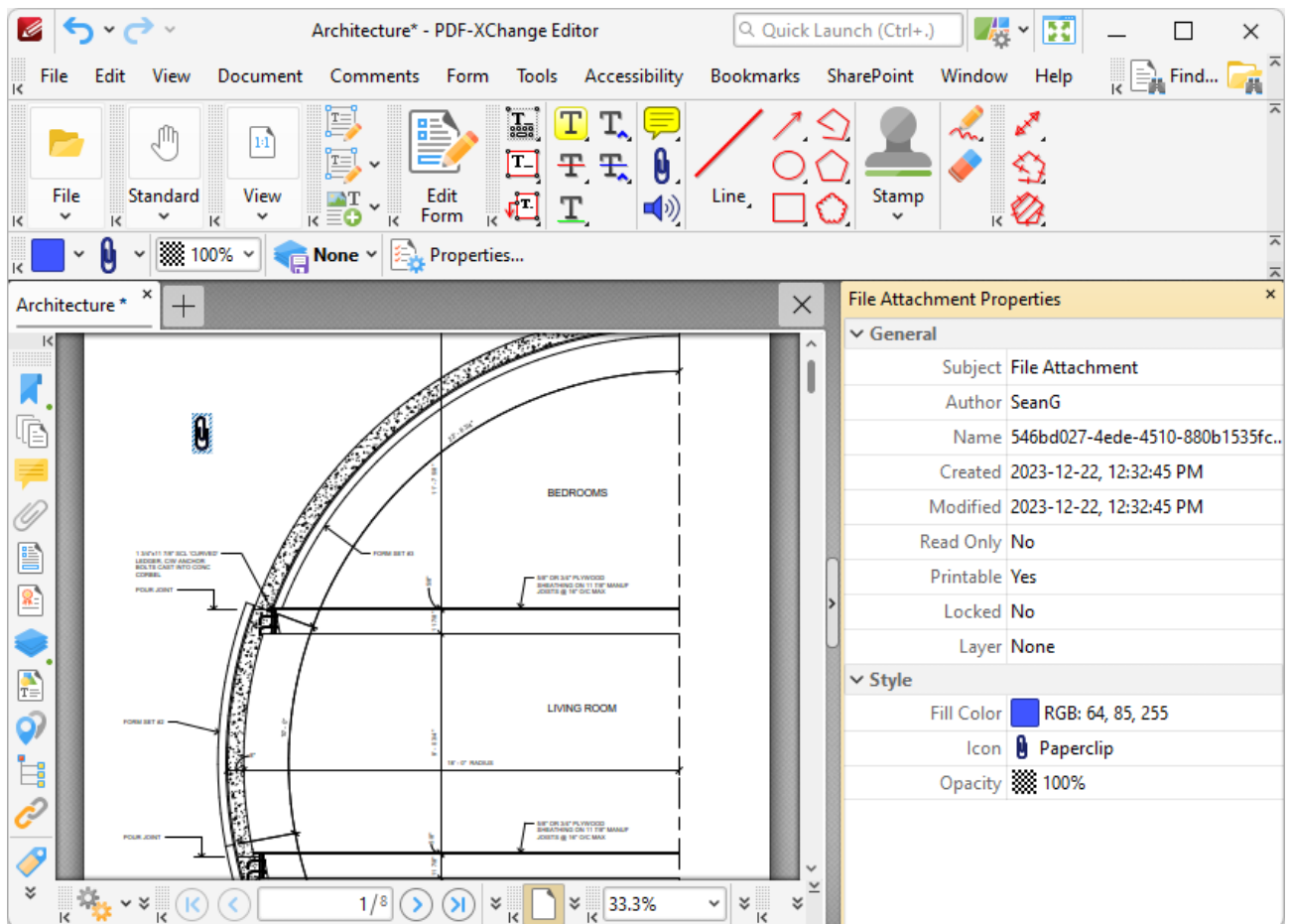
Figure 3. File Attachment Properties Pane

- **Subject** is the name of the file attachment comment, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the file attachment comment.

- **Name** is the unique name of the file attachment comment, as referenced within the application.
- **Created** is the date and time at which the file attachment comment was created.
- **Modified** is the date and time at which the file attachment comment was last modified.
- **Read Only** is the read only status of the file attachment comment. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the file attachment comment. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Locked** is the locked status of the file attachment comment. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the file attachment comment belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the file attachment comment.
- **Icon** determines the icon used for the file attachment comment.
- **Opacity** determines the level of transparency in the file attachment comment.

5.7.4.23 Sound Tool

Sound Tool

Click **Sound Tool** to add audio content annotations to documents:
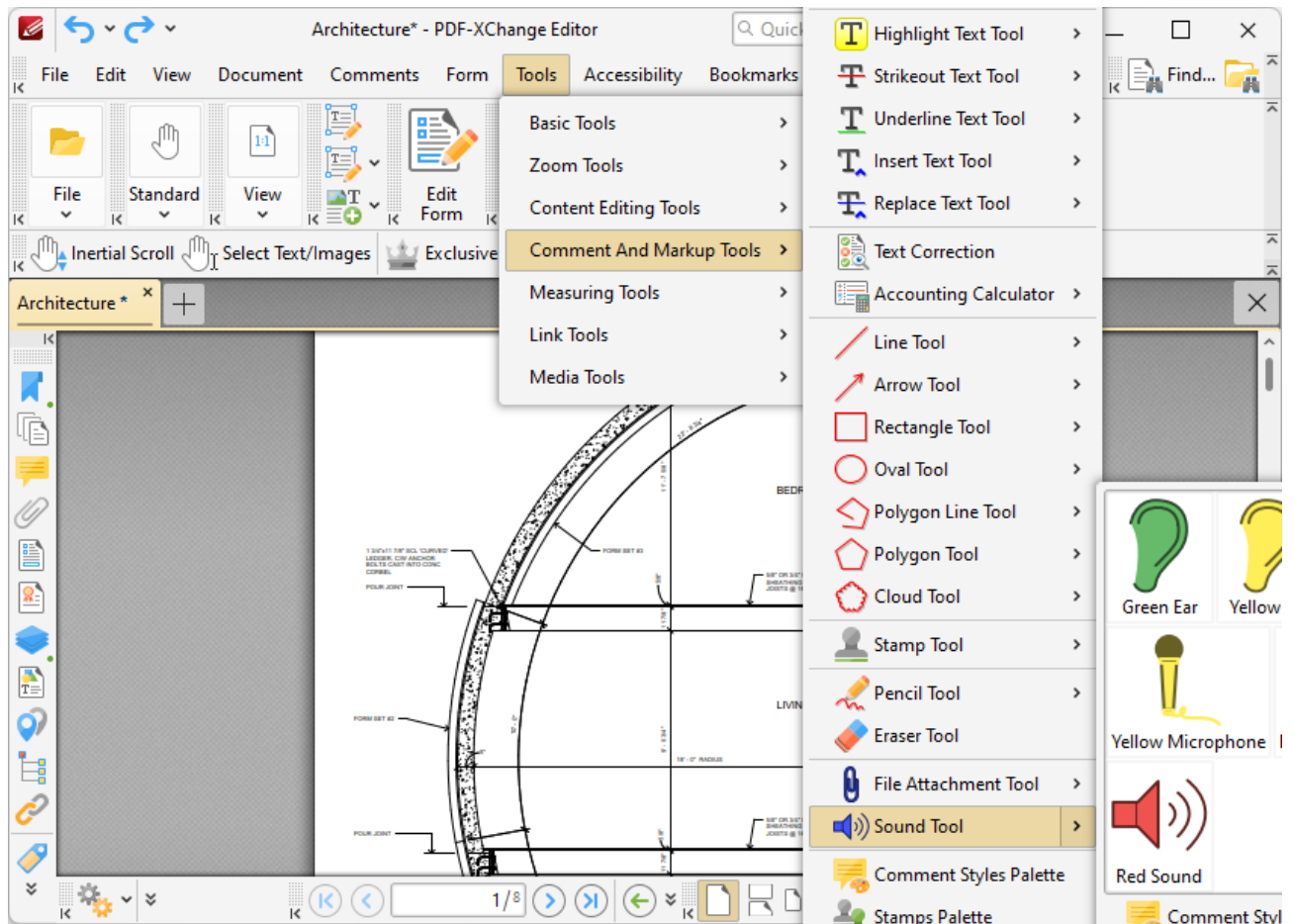
Figure 1. Tools Tab Submenu, Sound Tool

When the **Sound Tool** is selected, the pointer becomes a crosshairs icon. Move the icon to the desired location and click the mouse. The **Edit Action: "Play a Sound"** dialog box will open:
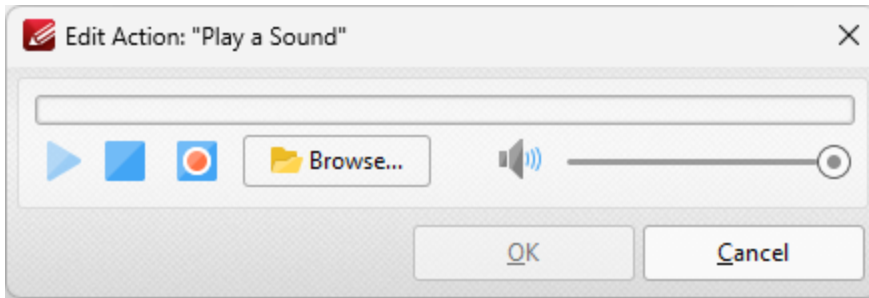
Figure 2. Edit Action: "Play a Sound" Dialog Box

- Click the **Browse** button to select a sound file from the local computer. The **Open Files** dialog box will open. Select the desired file and click **Open.** A link will appear in the document as detailed in *(figure 3).* The selected sound file will play when the link is clicked.
- Alternatively, click the record button to record a sound with a microphone. Click again to finish the recording. Click the play/stop buttons to review the sound, and use the slider to adjust the volume. Click **OK** when the desired sound has been recorded. The link will then appear in the document:
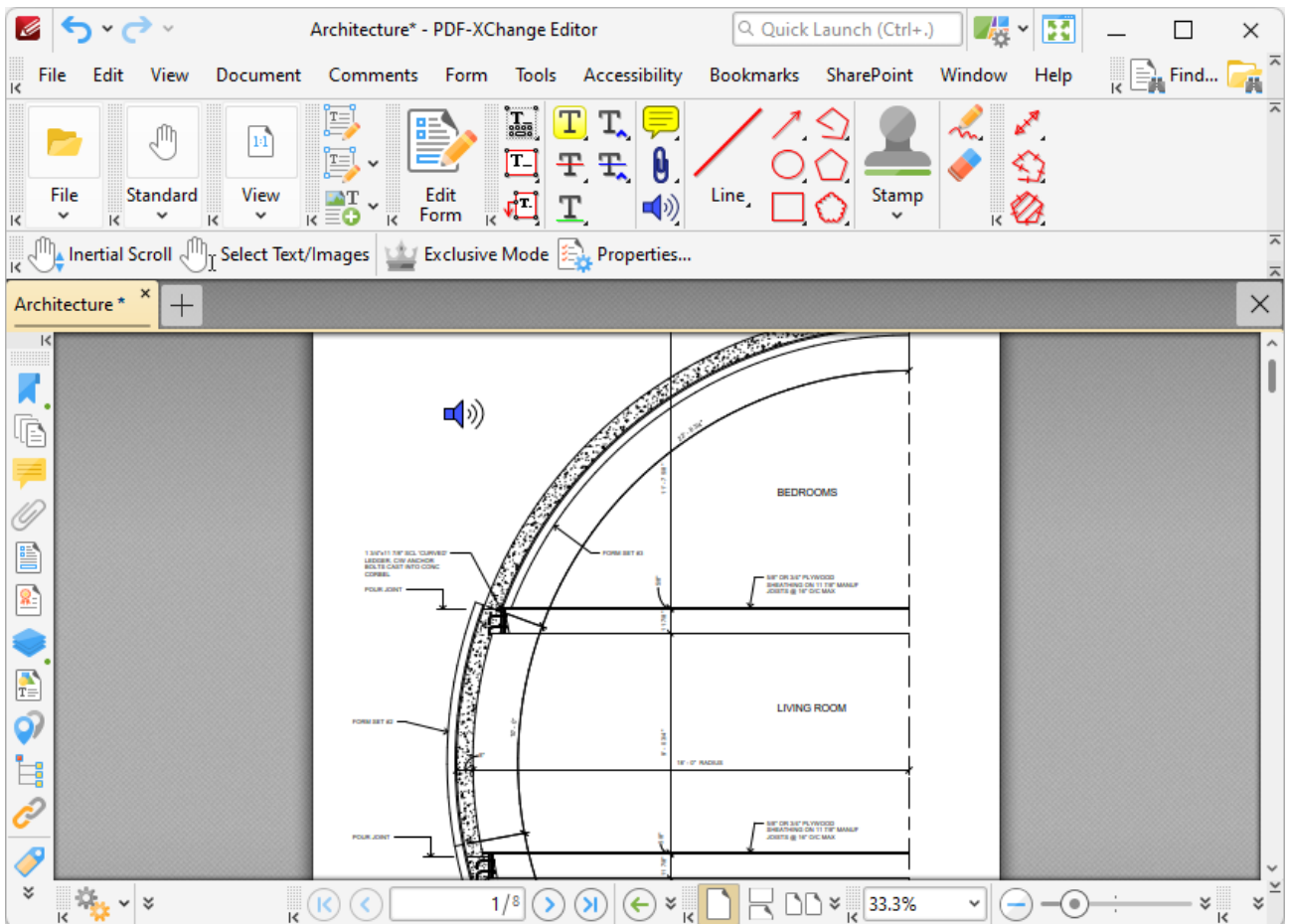
Figure 3. Sound Tool Example

- Click and drag the icon to reposition it. Alternatively, the arrow keys can be used for this purpose. Hold down Shift to move at an increased increment when using the arrow keys.
- Double-click icons to open the associated sound file.
- Right-click icons for further options. See **here** ⌷1120⌷ for an explanation of these options.
- When the **Sound Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⌷485⌷
    - **Fill Color** determines the icon color.
    - **Icon** determines the icon used for the tool.
    - **Opacity** determines the level of icon transparency.
    - **Keep Selected** determines whether or not the **Sound Tool** remains selected after an attachment has been created. If this option is enabled then the tool will remain selected and can be used to create several icons consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the the designated default tool immediately after creating the icon.
    - **Exclusive Mode** simplifies the process of using the **Sound Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create icons on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
    - Click **Properties** to view/edit additional sound annotation properties, as detailed below.
- Note that several default styles are available for sound tool icons, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** ⌷791⌷ can be used to save customized sound tool icon styles for subsequent use. Right-click the **Sound Tool** icon in the **Comment Toolbar** ⌷317⌷ to view existing styles and/or access the **Comment Styles Palette.**
- The **Commenting** ⌷250⌷ section of the **Preferences** ⌷228⌷ dialog box can be used to view/edit preferences for comments.
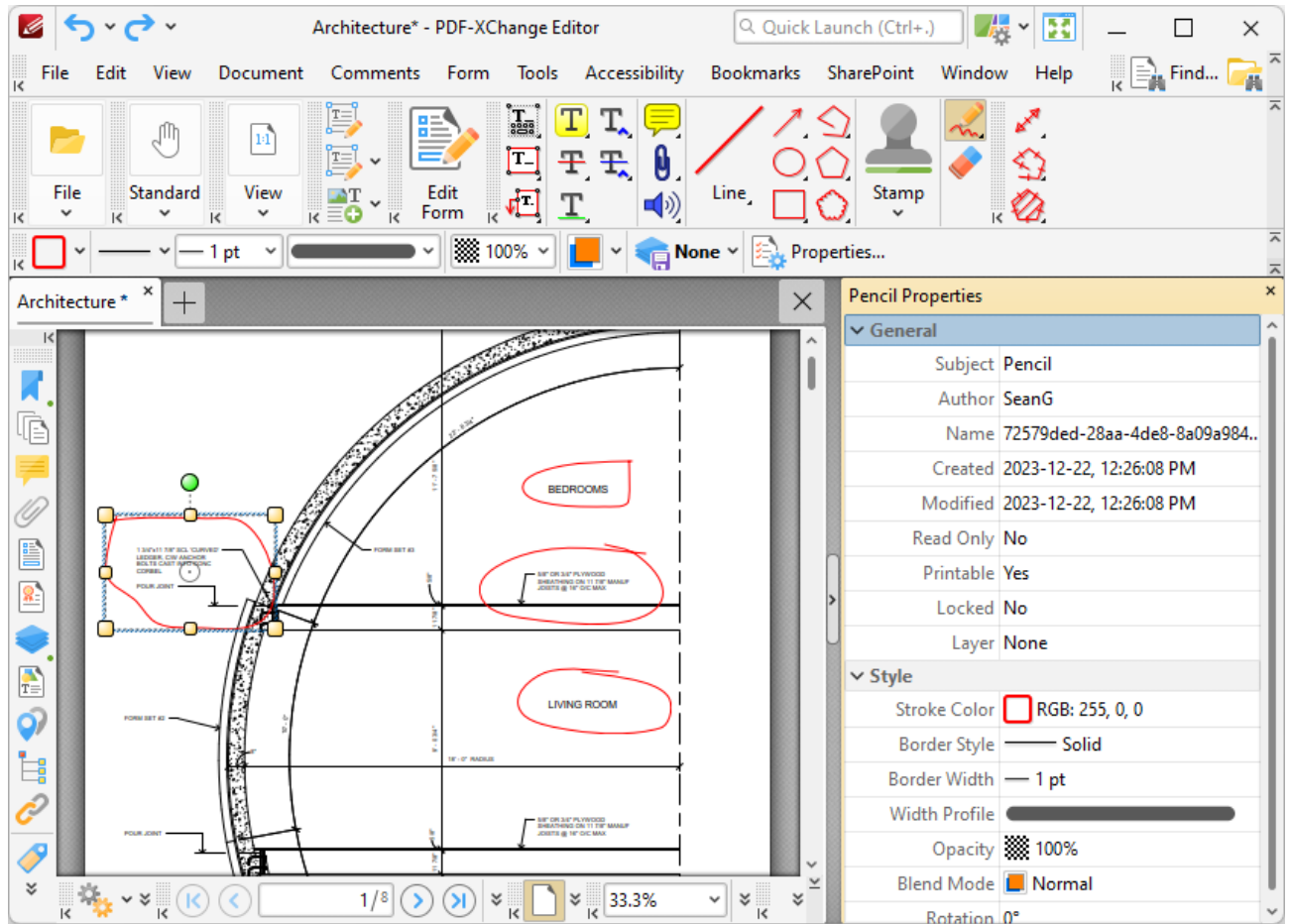
Sound Properties Pane
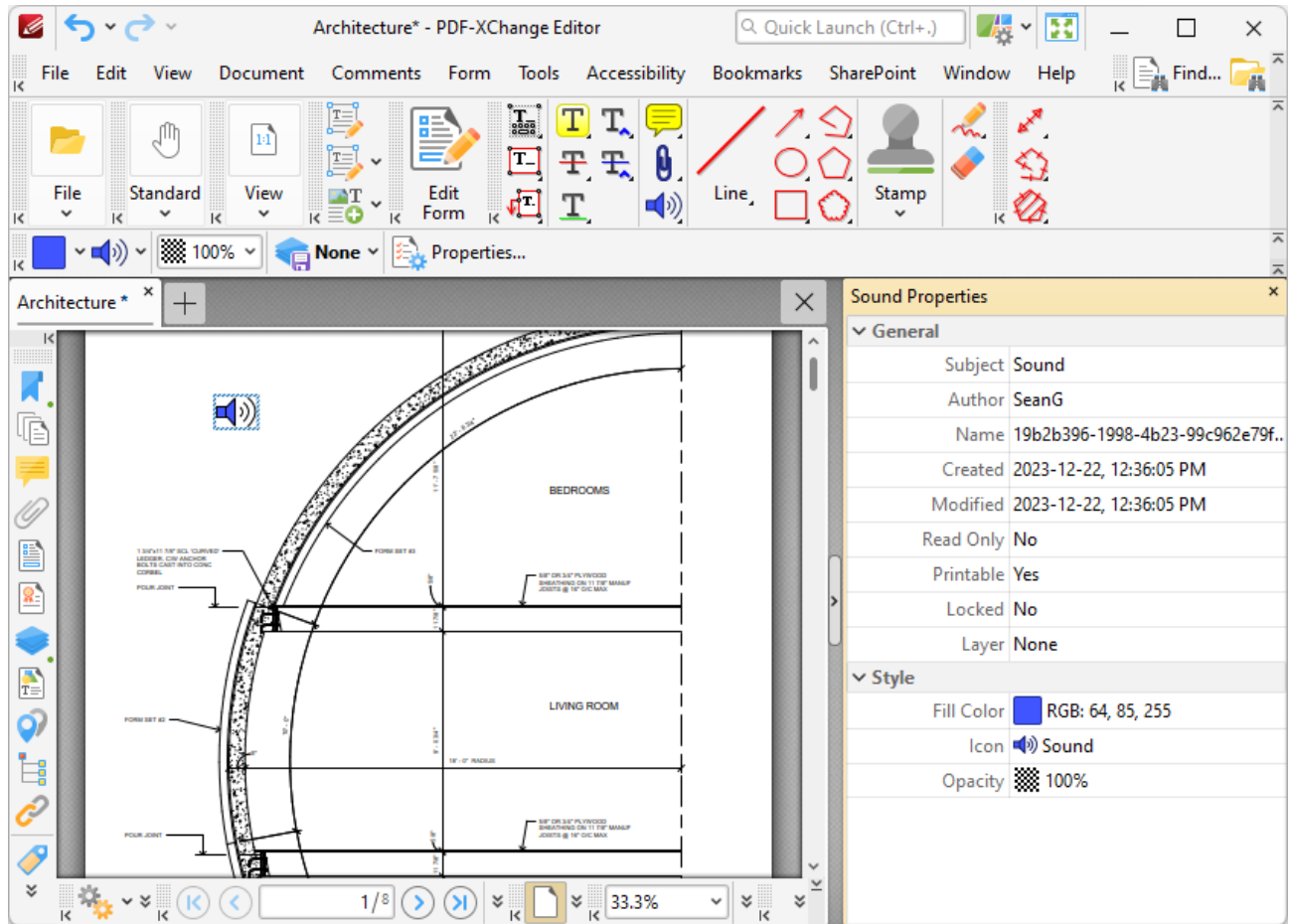
Figure 4. Sound Properties Pane

- **Subject** is the name of the sound comment, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the sound comment.
- **Name** is the unique name of the sound comment, as referenced within the application.
- **Created** is the date and time at which the sound comment was created.
- **Modified** is the date and time at which the sound comment was last modified.
- **Read Only** is the read only status of the sound comment. If this property is enabled then users cannot interact with the comment. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the sound comment. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Locked** is the locked status of the sound comment. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the sound comment belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the sound comment.
- **Icon** determines the icon used for the sound comment.

- **Opacity** determines the level of transparency in the sound comment.

5.7.5 **Measuring Tools**

Measuring Tools

Hover over **Measuring Tools** to open the following submenu:
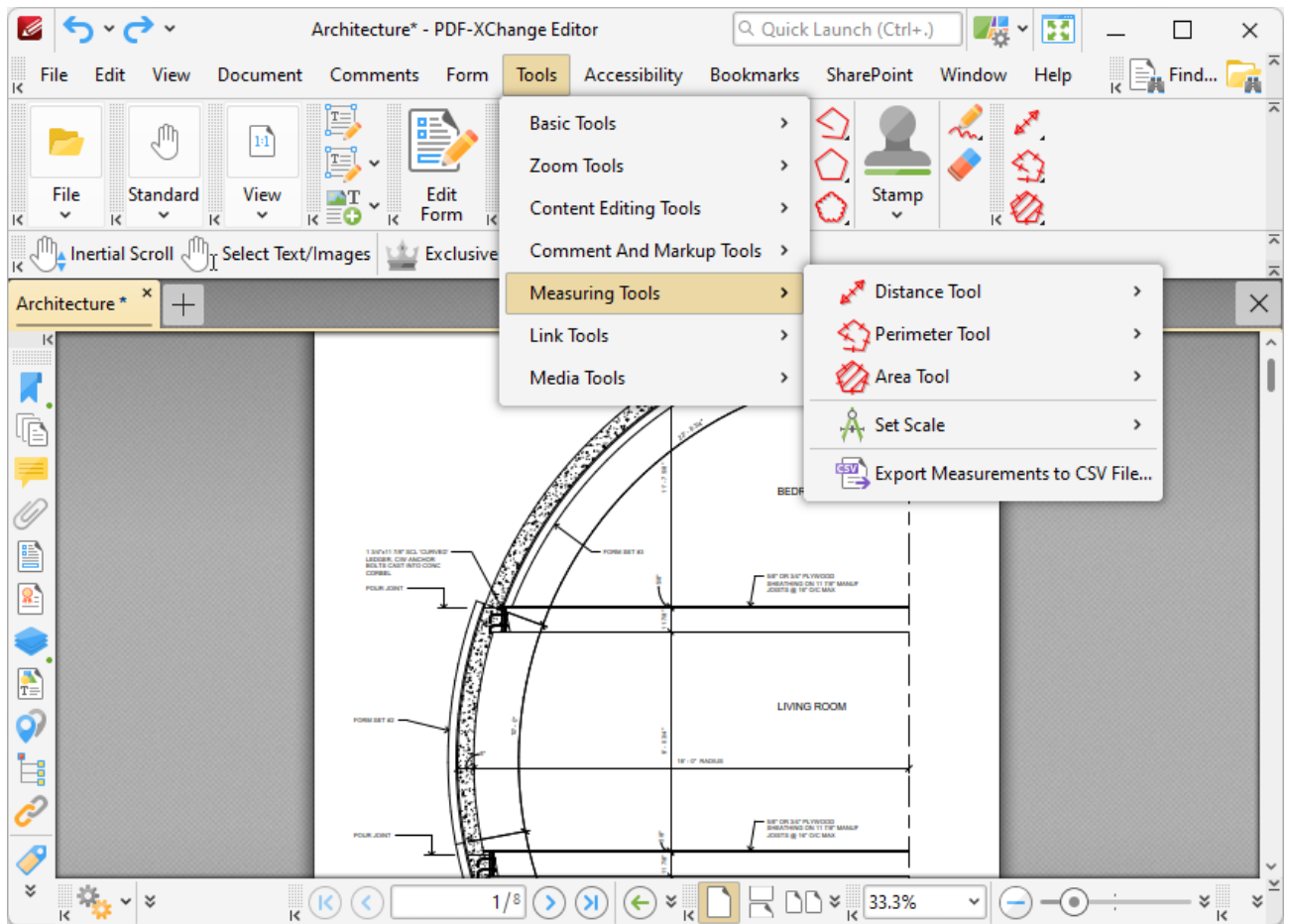
Figure 1. Tools Tab Submenu, Measuring Tools

The measuring tools are used to measure specific document dimensions:

- The **Distance Tool** is used to measure the distance between two points. See **here**⌐971⌐ for further information.

- The **Perimeter Tool** is used to measure the distance between multiple points. See **here** 976 for further information.
- The **Area Tool** is used to measure the area within designated borders. See **here** 981 for further information.
- The **Set Scale** feature is used to create/select/manage scales used in conjunction with the measuring tools. See **here** 986 for further information.
- Click **Export Measurements to CSV File** feature to export all measurements contained in the active document to file. Note that when documents that contain perimeter/area annotations are exported to comma-separated-values, the output document will contain an **"Alt. Value"** column for annotations. This value details the area of perimeter annotations and the perimeter of area annotations.

5.7.5.1 Distance Tool

Distance Tool

Click **Distance Tool** to add distance measurement annotations to documents:
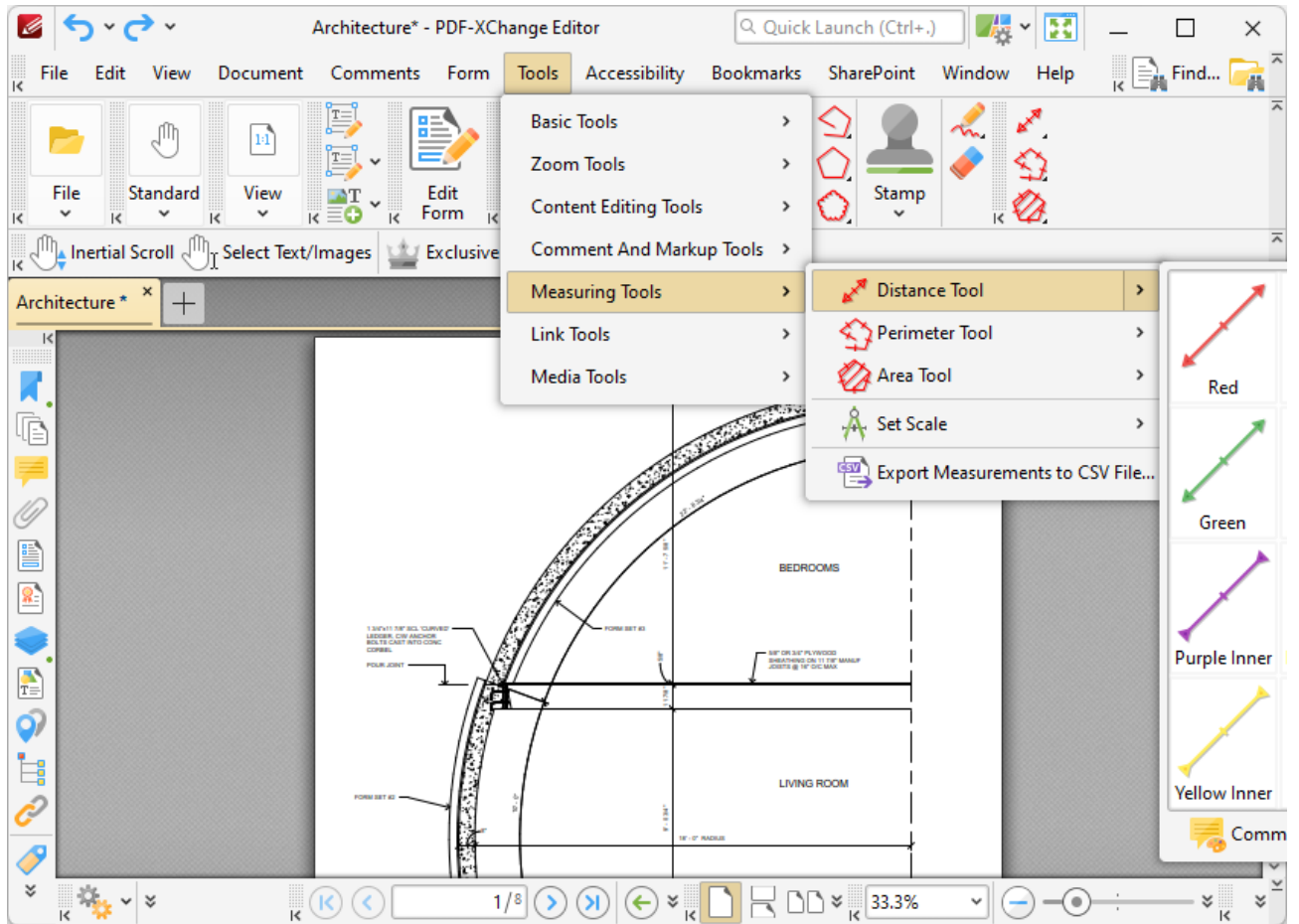
Figure 1. Tools Tab Submenu, Distance Tool

When the **Distance Tool** is selected the pointer becomes a crosshairs icon. Click to designate a starting point for the distance annotation. A red arrow will appear and the **Distance Tool** information box will be displayed in the lower right corner of the active window. Drag the crosshairs to the desired finishing point. The distance from the start point will be displayed as the pointer is moved, and further details will be displayed in the information box. Click to determine the measured distance. The baseline is then

established. Click again to set the baseline as the final measured distance. Alternatively, move the pointer up/down to reposition the baseline at a parallel position within the document and create perpendicular leader lines at either end. Click to complete the process:

Figure 2. Distance Tool Examples

- The **Distance Tool** calculates and displays distances measured according to the active scale. The **Scale** option in the **Properties Toolbar** 485 is used to determine the active scale. The scale reference figure will be displayed above the line. Right-click lines and select **Open Pop-Up Note** to customize the appearance of the scale reference figure.
- Click and drag the control points at either end of the baseline to adjust the length of the adjoining perpendicular lines.
- Click and drag the second pair of control points to adjust the length of the baseline and the angle of the annotation.
- Click and drag lines to reposition them.
- Use the arrow keys to reposition lines. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of lines.
- Hold down Shift to create lines at increments of fifteen degrees.
- Right-click lines for further options. See **here** 1120 for an explanation of these options.

- When the **Distance Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
  - **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
  - **Stroke Color** determines the color of lines.
  - **Border Style** determines the style of lines.
  - **Border Width** determines the size of the **Line Starting/Ending Styles**, detailed below.
  - **Line Starting Style** determines the style used at the start of lines.
  - **Line Ending Style** determines the style used at the end of lines.
  - **Opacity** determines the level of transparency in lines.
  - **Blend Mode** determines how lines blend with underlying content. These options are explained **here.** 1107
  - The **Scale** number boxes can be used to determine the scale of selected objects. Alternatively, click **Scale** to select/manage predefined scales or **calibrate a new scale.** 986
  - **Keep Selected** determines whether or not the **Distance Tool** remains selected after a line has been created. If this option is enabled then the tool will remain selected and can be used to create several lines consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating the line.
  - **Exclusive Mode** simplifies the process of using the **Distance Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create lines on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
  - Click **Properties** to view/edit additional distance annotation properties, as detailed below.
- Note that several default styles are available for distance tool annotations, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized distance line styles for subsequent use. Right-click the **Distance Tool** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**

Dimension Line Properties Pane

Figure 3. Dimension Line Properties

- **Subject** is the name of the distance annotation, as referenced in the **Comments** 519 pane.
- **Author** is the name of the user that created the distance annotation.
- **Name** is the unique name of the distance annotation, as referenced within the application.
- **Created** is the date and time at which the distance annotation was created.
- **Modified** is the date and time at which the distance annotation was last modified.
- **Read Only** is the read only status of the distance annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the distance annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the distance annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the distance annotation belongs. Further information about layers is available **here.** 535
- **Fill Color** determines the color of the line ending style used at the start of the distance annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the distance annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the distance annotation.
- **Blend Mode** determines how distance annotations blend with overlapping content. These options are explained **here.** 1107
- **Start** determines the line ending style used at the start of the distance annotation.
- **End** determines the line ending style used at the end of the distance annotation.
- **Start Scale** determines the size of the line ending used at the start of the distance annotation.
- **End Scale** determines the size of the line ending used at the end of the distance annotation.
- **Leader Length** determines the length of the leader lines used for the distance annotation. Leader lines extend from each endpoint of the distance annotation, perpendicular to the annotation itself.
- **Leader Extension** determines the length of leader line extensions that extend from the distance annotation.
- **Leader Offset** determines the length of the leader line offset, which is the amount of empty space between the endpoints of the distance annotation and the beginning of the leader lines.
- **Show Caption** determines whether or not the text contained in the pop-up note of the annotation is displayed.
- **Inline Caption** determines whether or not the caption is an inline caption. If this option is enabled then captions are placed inside the distance annotation instead of on top of the distance annotation.
- **Length** determines the length of the distance annotation.
- **Total Distance** displays the total distance of the annotation. If you have multiple distance annotations selected then the total length of the annotations will be displayed for this property.
- **Avg. Distance** displays the average distance of the annotation. If you have multiple distance annotations selected then the average length of the annotations will be displayed for this property.
- **Min. Distance** displays the minimum distance of the annotation. If you have multiple distance annotations selected then the length of the shortest annotation will be displayed for this property.
- **Max. Distance** displays the maximum distance of the annotation. If you have multiple distance annotations selected then the length of the longest annotation will be displayed for this property.
- **Scale** determines the scale used for the distance annotation. Further information about scales is available **here.** 986
- **Label** determines the text label displayed with the distance annotation.
- **Precision** determines the precision with which scale conversions are displayed.
- **Group** determines the symbol used as the group separator.
- **Decimal** determines the symbol used as the decimal separator.

5.7.5.2 Perimeter Tool

Perimeter Tool

Click **Perimeter Tool** to add perimeter measurement annotations to documents:

Figure 1. Tools Tab Submenu, Perimeter Tool

When the **Perimeter Tool** is selected the pointer becomes a crosshairs icon. Click to designate a starting point from which to measure. A red line will appear and the **Perimeter Tool** information box will be displayed in the lower right corner of the active window. This box will update as the tool is used. Drag the crosshairs to the location 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 a pop-up note is created automatically for the perimeter line and further options are enabled:
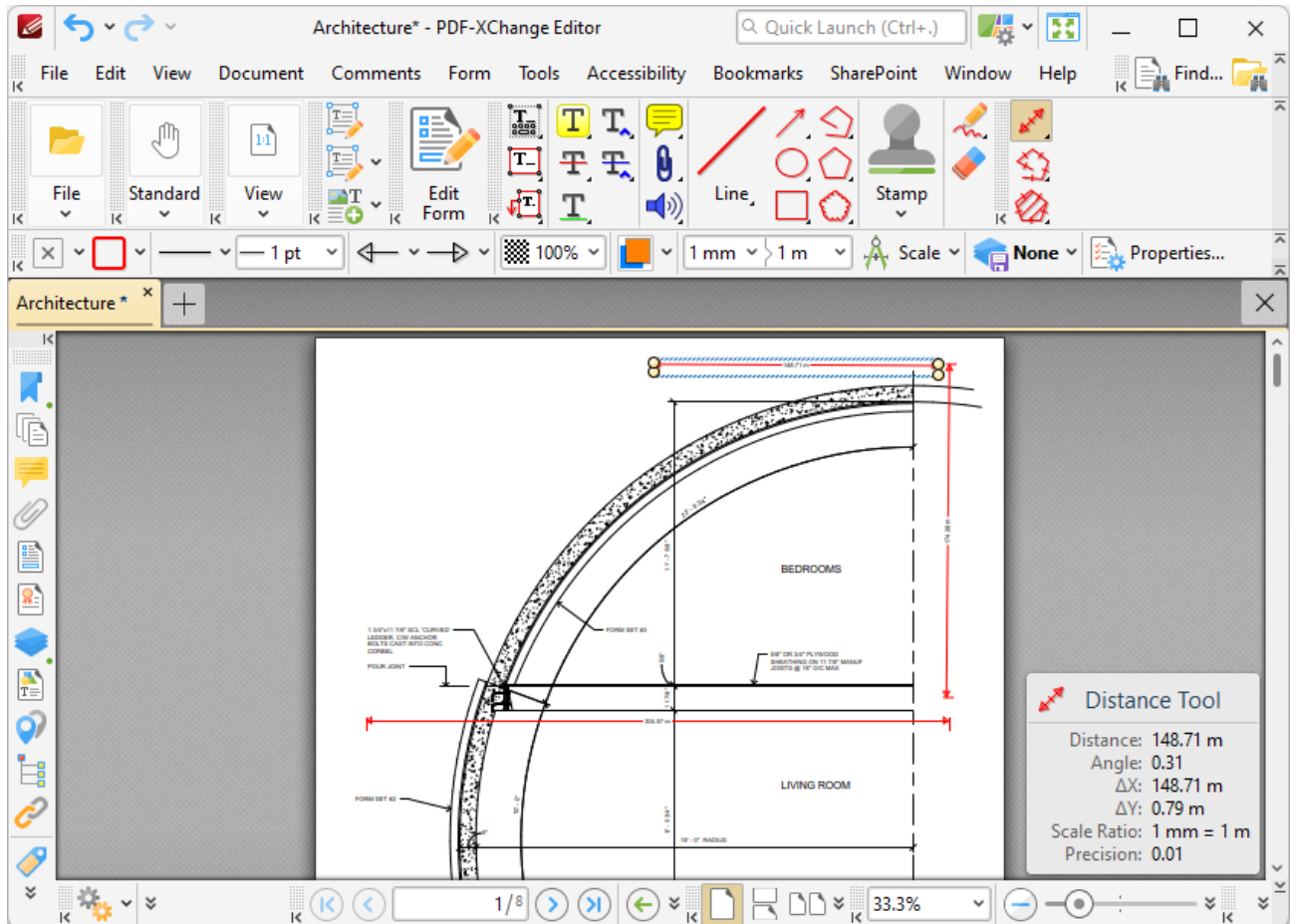

Figure 2. Perimeter Tool Example

- The **Perimeter Tool** calculates the distance measured according to the active scale. The **Scale** option in the **Properties Toolbar** [485] is used to determine the active scale.
- Click and drag the perimeter line to reposition it. The circle at the center can also be used for this purpose.
- Click and drag the outer control points to resize the perimeter line.
- Click and drag the inner control points to reshape the perimeter line.
- Click and drag the green control point at the top to rotate the perimeter line. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition perimeter lines. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** [610] to assist in the precise placement of perimeter lines.
- Hold down Shift to create perimeter lines at increments of fifteen degrees.
- Right-click perimeter lines for further options. See **here** [1120] for an explanation of these options.
- When the **Perimeter Tool** is selected, the following options are enabled in the **Properties Toolbar:** [485]

- **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
- **Stroke Color** determines the color of lines.
- **Border Style** determines the style of lines.
- **Border Width** determines the size of the **Line Starting/Ending Styles**, detailed below.
- **Line Starting Style** determines the style used at the start of lines.
- **Line Ending Style** determines the style used at the end of lines.
- **Opacity** determines the level of transparency in lines.
- **Blend Mode** determines how lines blend with underlying content. These options are explained **here.** 1107
- The **Scale** number boxes can be used to determine the scale of selected objects. Alternatively, click **Scale** to select/manage predefined scales or **calibrate a new scale.** 986
- **Keep Selected** determines whether or not the **Perimeter Tool** remains selected after a line has been created. If this option is enabled then the tool will remain selected and can be used to create several lines consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating the line.
- **Exclusive Mode** simplifies the process of using the **Perimeter Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create perimeter lines on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional perimeter annotation properties, as detailed below.
- Note that several default styles are available for perimeter tool annotations, as detailed in **(figure 1).** Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized perimeter line styles for subsequent use. Right-click the **Perimeter Tool** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
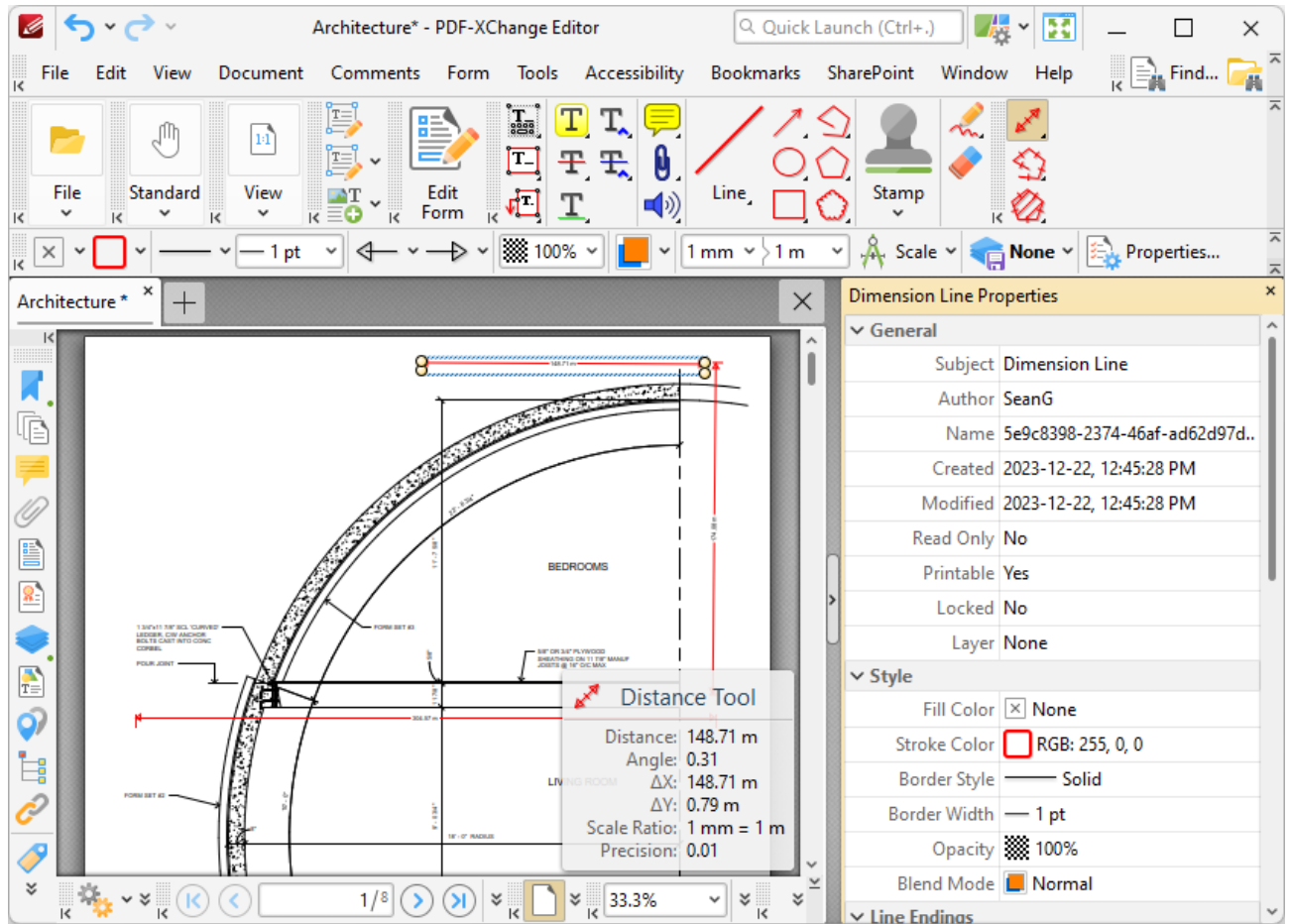
Perimeter Properties Pane

Figure 3. Perimeter Properties Pane

- **Subject** is the name of the perimeter annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the perimeter annotation.
- **Name** is the unique name of the perimeter annotation, as referenced within the application.
- **Created** is the date and time at which the perimeter annotation was created.
- **Modified** is the date and time at which the perimeter annotation was last modified.
- **Read Only** is the read only status of the perimeter annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the perimeter annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the perimeter annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the perimeter annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the line ending style used at the start of the perimeter annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the perimeter annotation.
- **Border Style** determines the style of the annotation.
- **Border Width** determines the width of the annotation.
- **Opacity** determines the level of transparency in the perimeter annotation.
- **Blend Mode** determines how perimeter annotations blend with overlapping content. These options are explained **here.** 1107
- **Rotation** determines the degrees of rotation of the perimeter annotation.
- **Start** determines the line ending style used at the start of the perimeter annotation.
- **End** determines the line ending style used at the end of the perimeter annotation.
- **Start Scale** determines the size of the line ending used at the start of the perimeter annotation.
- **End Scale** determines the size of the line ending used at the end of the perimeter annotation.
- **Scale** determines the scale used for the perimeter annotation. Further information about scales is available **here.** 986
- **Label** determines the text label displayed with the pop-up note of the perimeter annotation.
- **Precision** determines the precision with which scale conversions are displayed.
- **Group** determines the symbol used as the group separator.
- **Decimal** determines the symbol used as the decimal separator.
- **Total Perimeter** displays the total perimeter of the annotation. If you have multiple perimeter annotations selected then the total perimeter of the annotations will be displayed for this property.
- **Avg. Perimeter** displays the average perimeter of the annotation. If you have multiple perimeter annotations selected then the average perimeter of the annotations will be displayed for this property.
- **Min. Perimeter** displays the minimum perimeter of the annotation. If you have multiple perimeter annotations selected then the perimeter of the shortest annotation will be displayed for this property.
- **Max. Perimeter** displays the maximum perimeter of the annotation. If you have multiple perimeter annotations selected then the perimeter of the longest annotation will be displayed for this property.

5.7.5.3 Area Tool

Area Tool

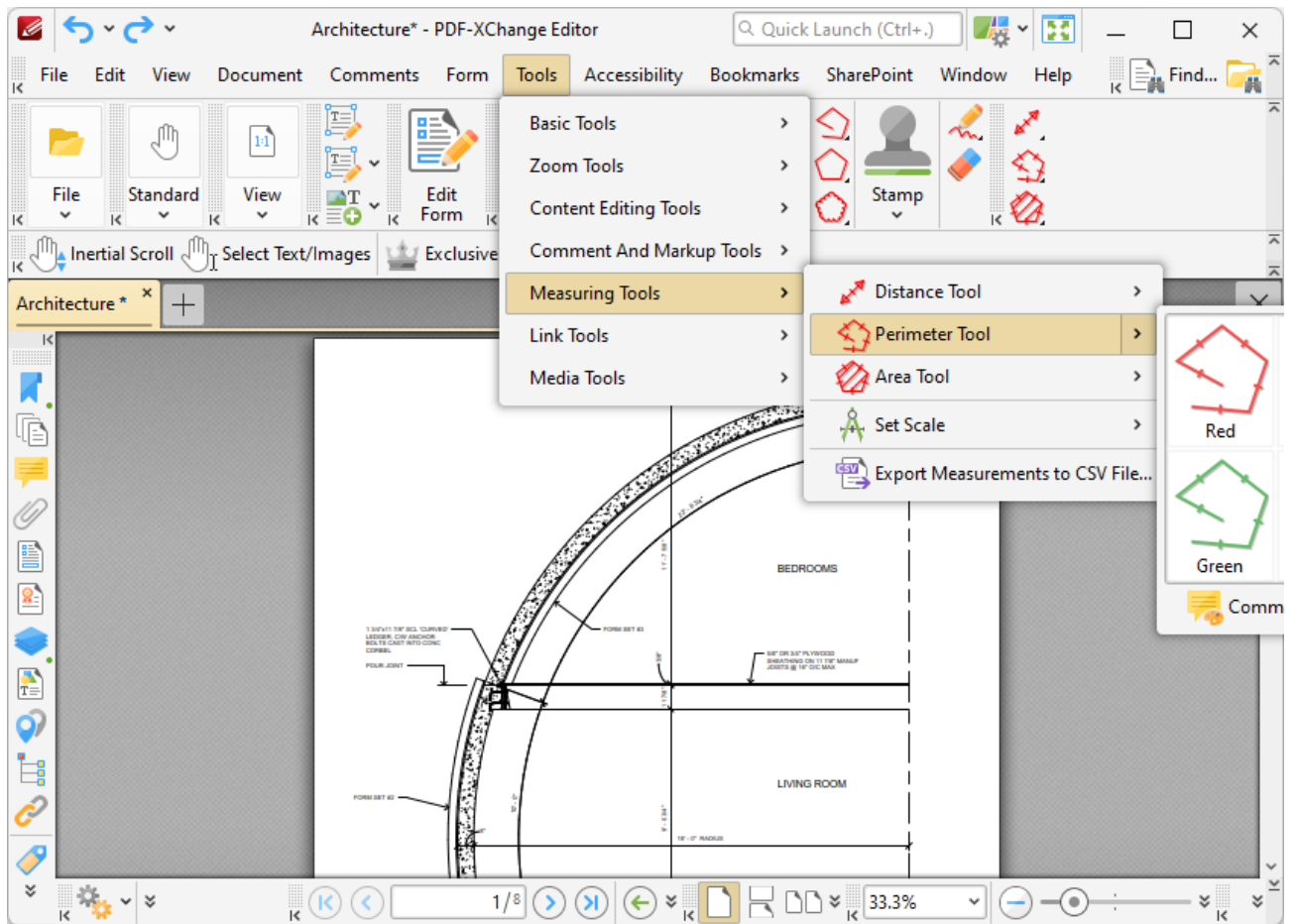Click **Area Tool** to add area measurement annotations to documents:
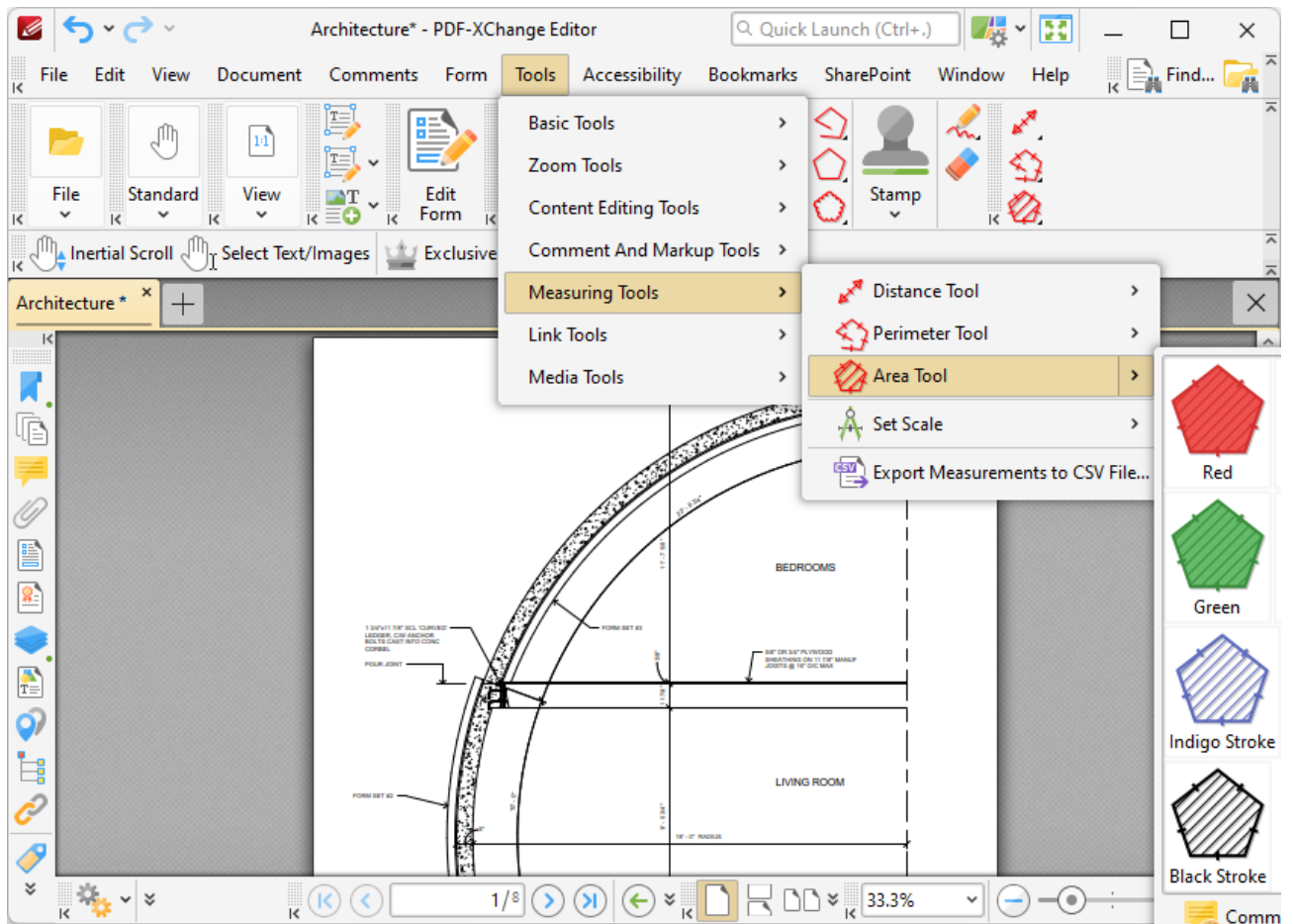
Figure 1. Tools Tab Submenu, Area Tool

When the **Area Tool** is selected the pointer becomes a crosshairs icon. Click to designate a starting point from which to measure. A red line will appear and the **Area Tool** information box will be displayed in the lower right corner of the active window. This box will update as the tool is used. Drag the crosshairs to the location 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 a pop-up note is created automatically for the area line and further options are enabled:
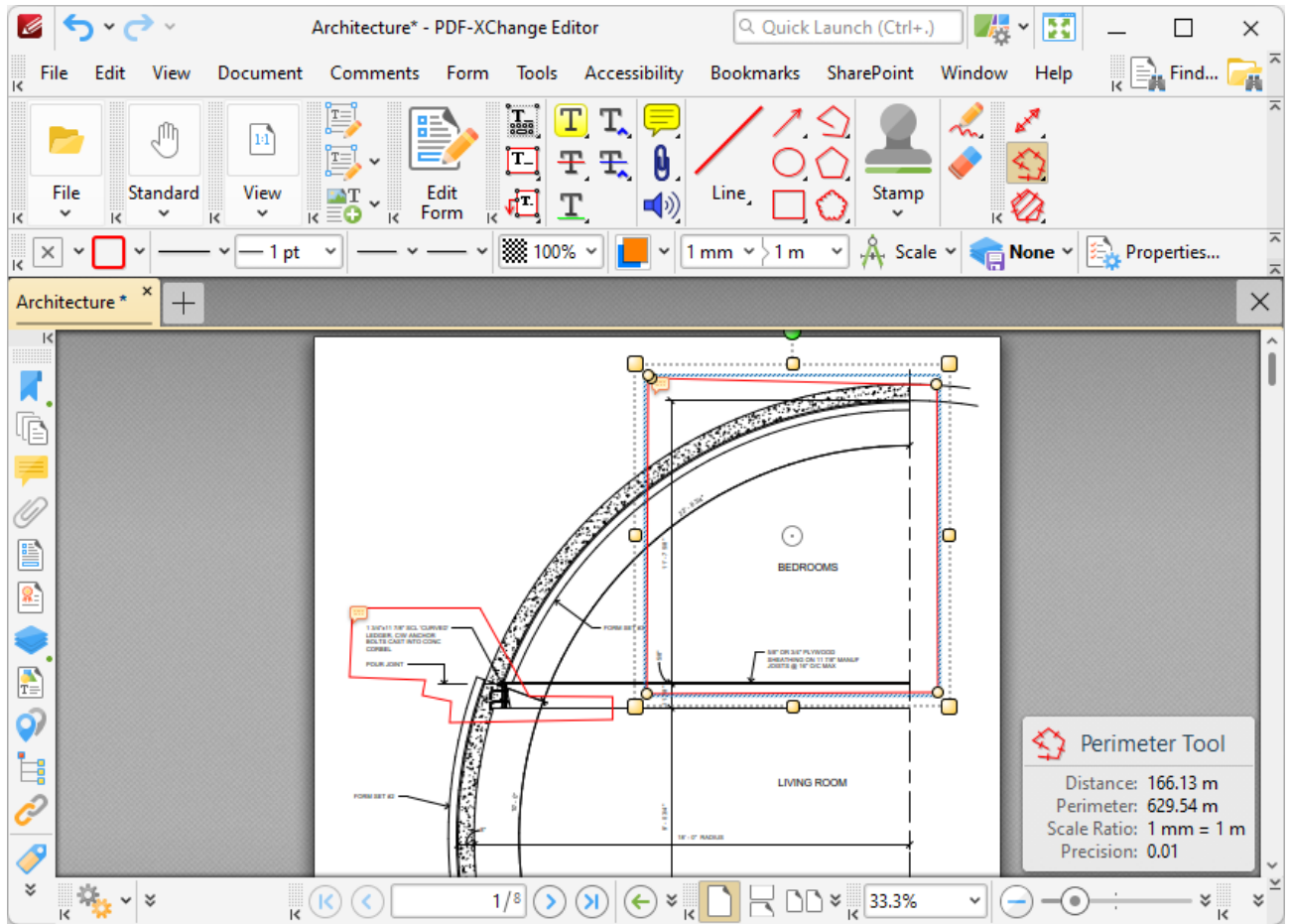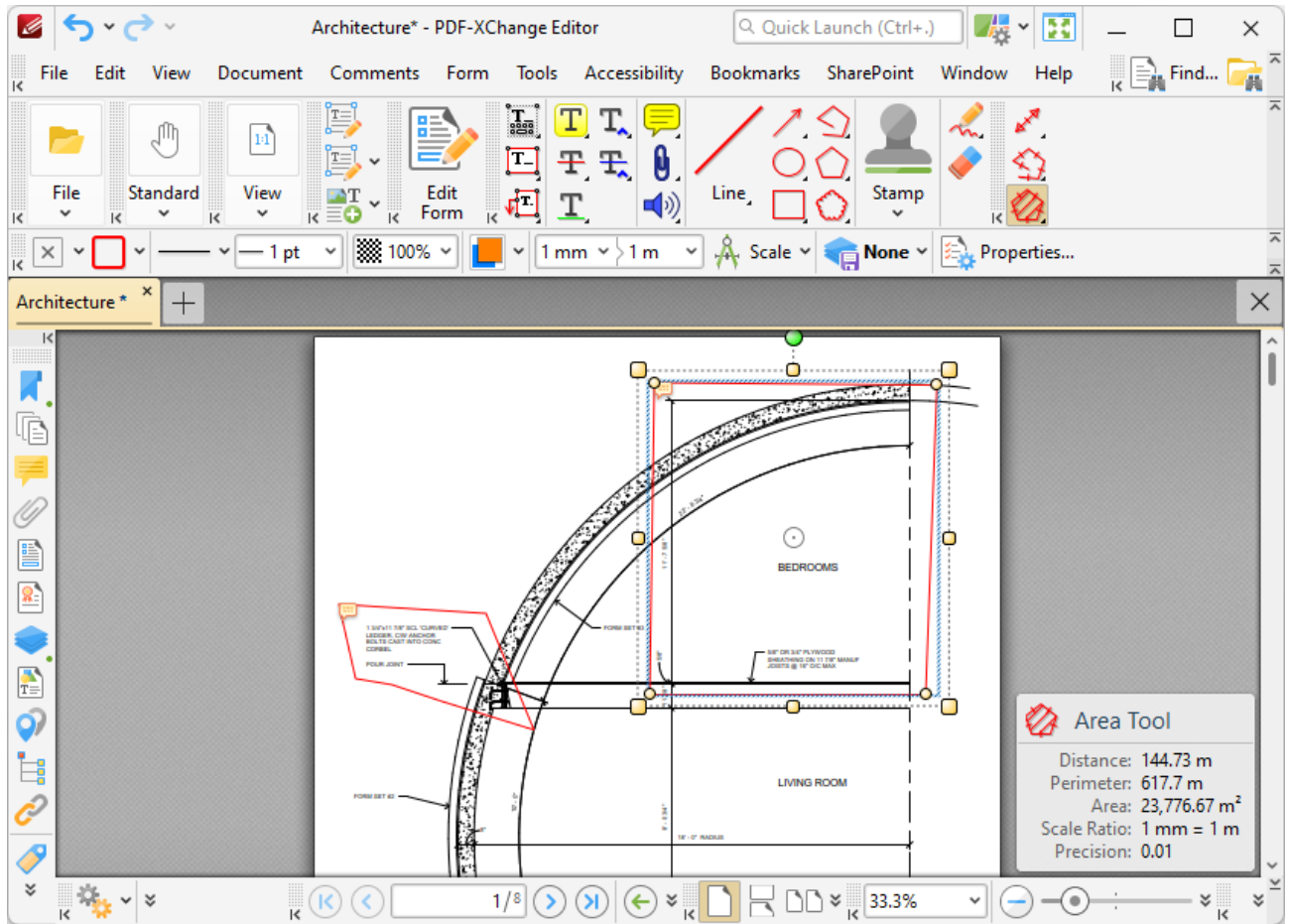

Figure 2. Area Tool Example

- The **Area Tool** calculates the distance measured and area according to the active scale. The **Scale** option in the **Properties Toolbar** 485 is used to determine the active scale.
- Click and drag the area shape to reposition it. The circle at the center can also be used for this purpose.
- Click and drag the outer control points to resize the area shape.
- Click and drag the inner control points to reshape the area shape.
- Click and drag the green control point at the top to rotate the area shape. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition area shapes. Hold down Shift to move at an increased increment.
- Use the editing aids detailed **here** 610 to assist in the precise placement of area shapes.
- Hold down Shift to create area lines at increments of fifteen degrees.
- Right-click area shapes for further options. See **here** 1120 for an explanation of these options.
- When the **Area Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485

- **Fill Color** determines the fill color of the area shape.
- **Stroke Color** determines the color of the area border.
- **Border Style** determines the style of the area border.
- **Border Width** determines the size of the **Line Starting/Ending Styles**, detailed below.
- **Line Starting Style** determines the style used at the start of area shapes.
- **Line Ending Style** determines the style used at the end of area shapes.
- **Opacity** determines the level of transparency in the area shape.
- **Blend Mode** determines how area shapes blend with underlying content. These options are explained **here.** 1107
- The **Scale** number boxes can be used to determine the scale of selected objects. Alternatively, click **Scale** to select/manage predefined scales or **calibrate a new scale.** 986
- **Keep Selected** determines whether or not the **Area Tool** remains selected after an area shape has been created. If this option is enabled then the tool will remain selected and can be used to create several area shapes consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating an area shape.
- **Exclusive Mode** simplifies the process of using the **Area Tool**. When **Exclusive Mode** is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create area shapes at locations that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
- Click **Properties** to view/edit additional area annotation properties, as detailed below.
- Note that several default styles are available for area shape annotations, as detailed in *(figure 1).* Click to select alternative annotation styles. The **Comment Styles Palette** 791 can be used to save customized area shape styles for subsequent use. Right-click the **Area Tool** icon in the **Comment Toolbar** 317 to view existing styles and/or access the **Comment Styles Palette.**
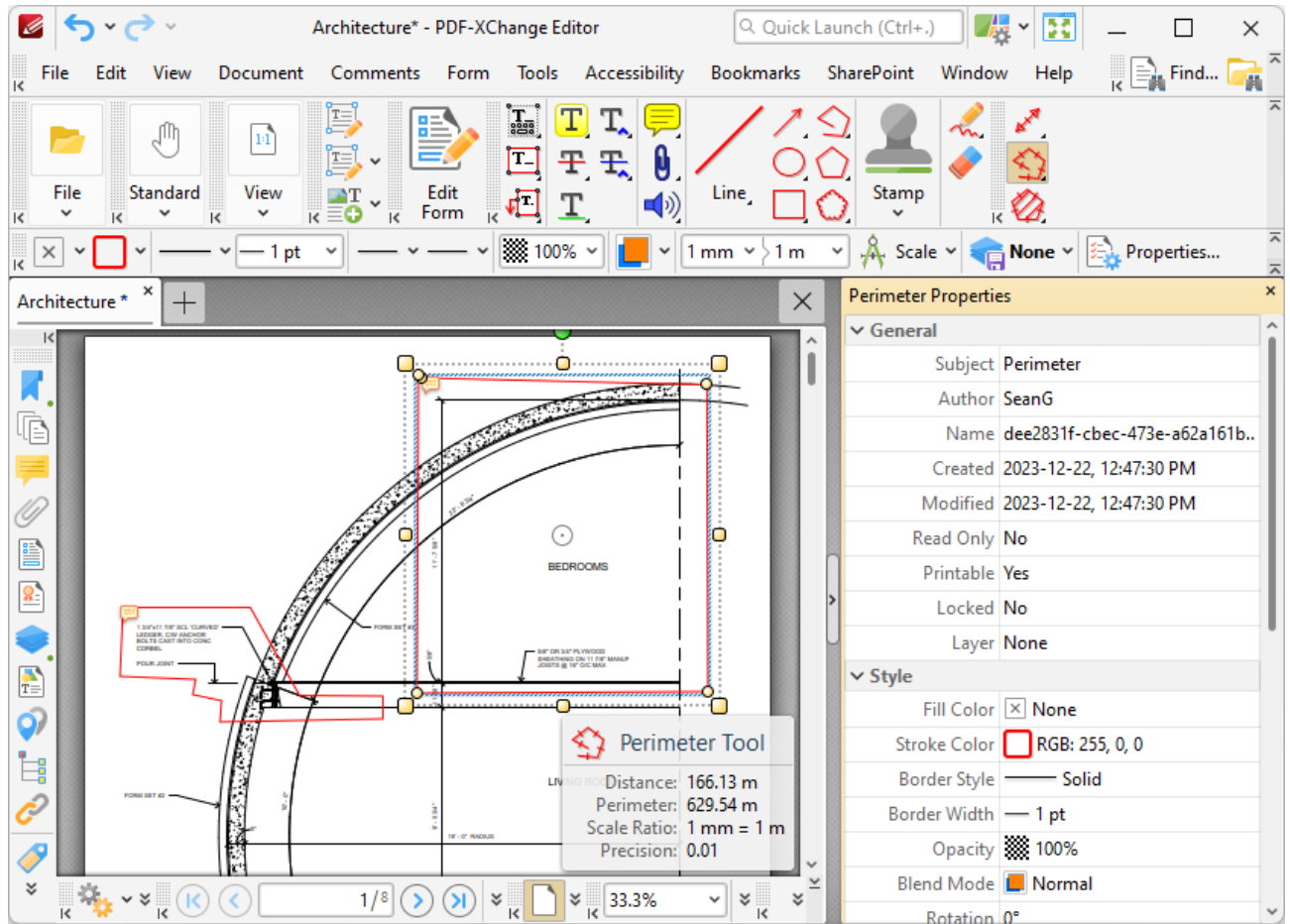
Area Properties Pane
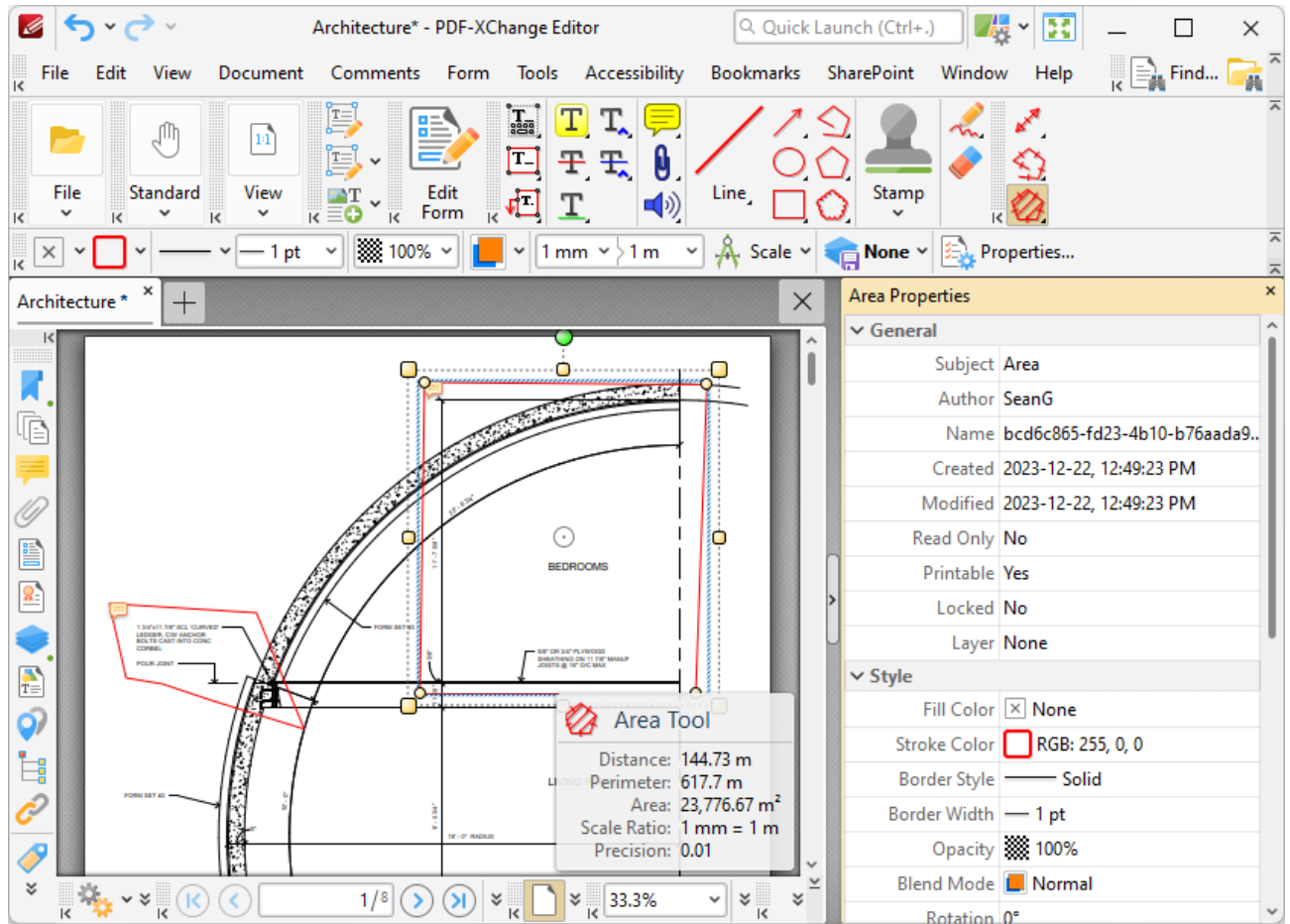
Figure 3. Area Properties Pane

- **Subject** is the name of the area annotation, as referenced in the **Comments** [519] pane.
- **Author** is the name of the user that created the area annotation.
- **Name** is the unique name of the area annotation, as referenced within the application.
- **Created** is the date and time at which the area annotation was created.
- **Modified** is the date and time at which the area annotation was last modified.
- **Read Only** is the read only status of the area annotation. If this property is enabled then users cannot interact with the annotation. Please note that it is necessary to use JavaScript to change the value of this property.
- **Printable** is the print status of the area annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the area annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the area annotation belongs. Further information about layers is available **here.** [535]
- **Fill Color** determines the color of the line ending style used at the start of the area annotation. The line ending property is detailed below.

- **Stroke Color** determines the color of the area annotation.
- **Border Style** determines the style of the area annotation.
- **Border Width** determines the width of the area annotation.
- **Opacity** determines the level of transparency in the area annotation.
- **Blend Mode** determines how area annotations blend with overlapping content. These options are explained **here.** 1107
- **Rotation** determines the degrees of rotation of the area annotation.
- **Scale** determines the scale used for the area annotation. Further information about scales is available **here.** 986
- **Label** determines the text label displayed with the pop-up note of the area annotation.
- **Precision** determines the precision with which scale conversions are displayed.
- **Group** determines the symbol used as the group separator.
- **Decimal** determines the symbol used as the decimal separator.
- **Total Perimeter** displays the total perimeter of the annotation. If you have multiple annotations selected then the total perimeter of the annotations will be displayed for this property.
- **Avg. Perimeter** displays the average perimeter of the annotation. If you have multiple annotations selected then the average perimeter of the annotations will be displayed for this property.
- **Min. Perimeter** displays the minimum perimeter of the annotation. If you have multiple annotations selected then the perimeter of the shortest annotation will be displayed for this property.
- **Max. Perimeter** displays the maximum perimeter of the annotation. If you have multiple annotations selected then the perimeter of the longest annotation will be displayed for this property.
- **Total Area** displays the total area of the annotation. If you have multiple area annotations selected then the total area of the annotations will be displayed for this property.
- **Avg. Area** displays the average area of the annotation. If you have multiple area annotations selected then the average area of the annotations will be displayed for this property.
- **Min. Area** displays the minimum area of the annotation. If you have multiple area annotations selected then the area of the shortest annotation will be displayed for this property.
- **Max. Area** displays the maximum area of the annotation. If you have multiple area annotations selected then the area of the longest annotation will be displayed for this property.

5.7.5.4 Set Scale

Set Scale

Hover over **Set Scale** to view scale options. These options are used in conjunction with the measuring tools:
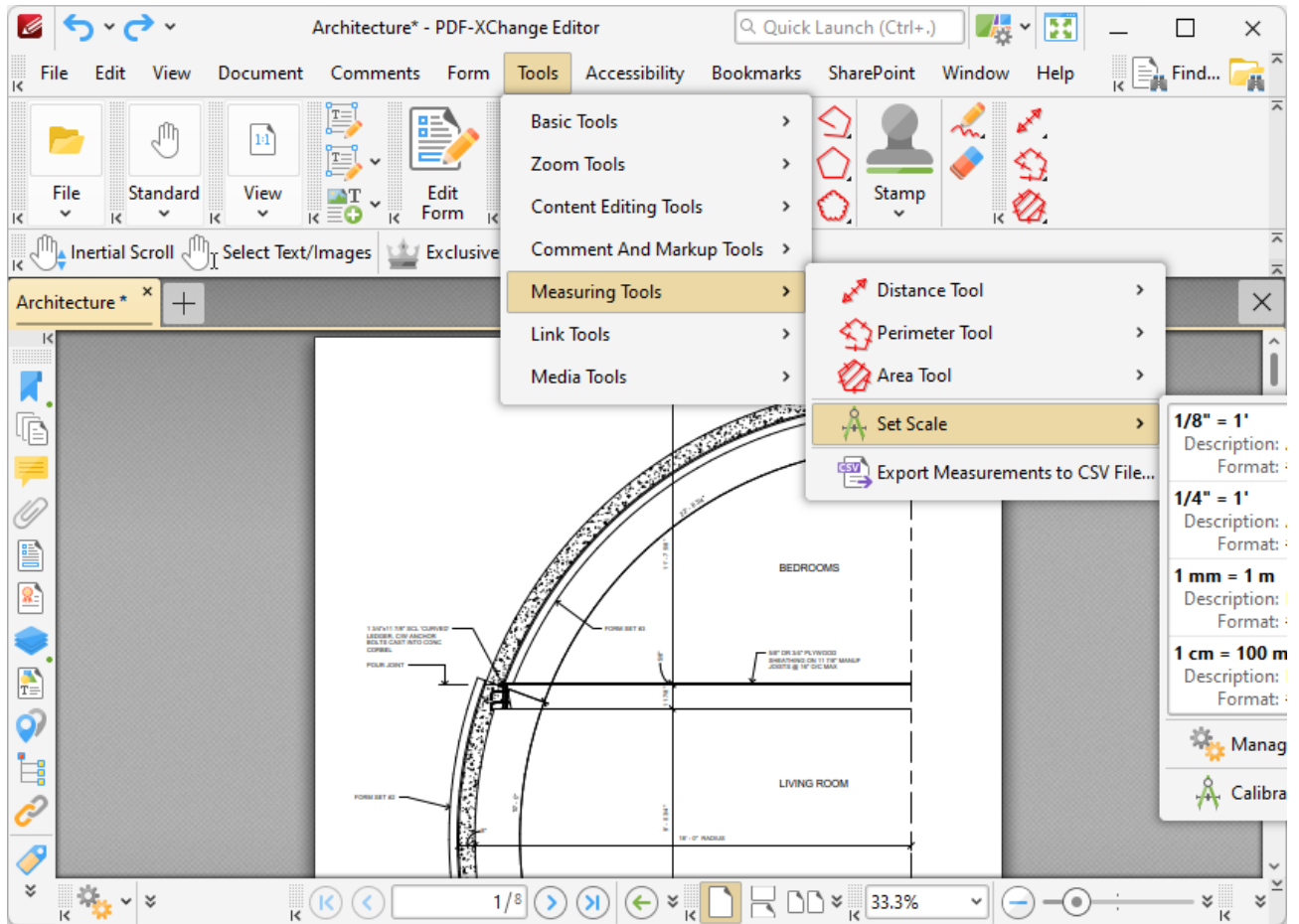
Figure 1. Tools Tab Submenu, Set Scale

The following options are available:
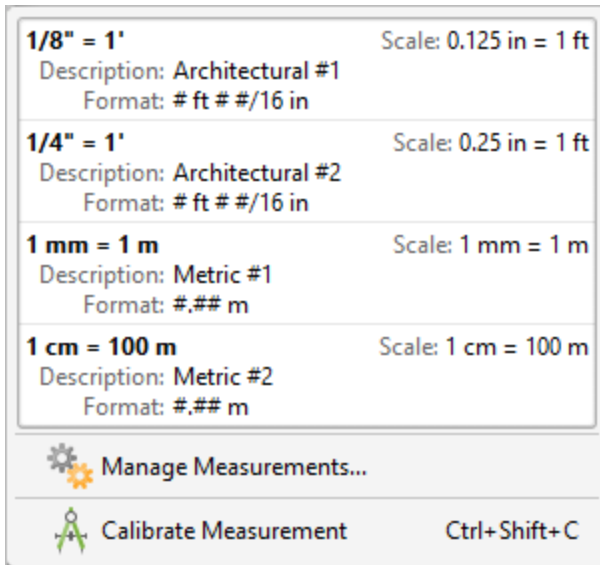
Figure 2. Set Scale Options

- Existing scales are detailed in the pane. Click to activate scales.
- Click **Manage Measurements** to view/edit/clone/delete scales.
- Click **Calibrate Measurement** to calibrate a new measurement. The pointer will become a crosshairs icon. Click and drag to determine a calibration distance. The **Calibration** dialog box will open:
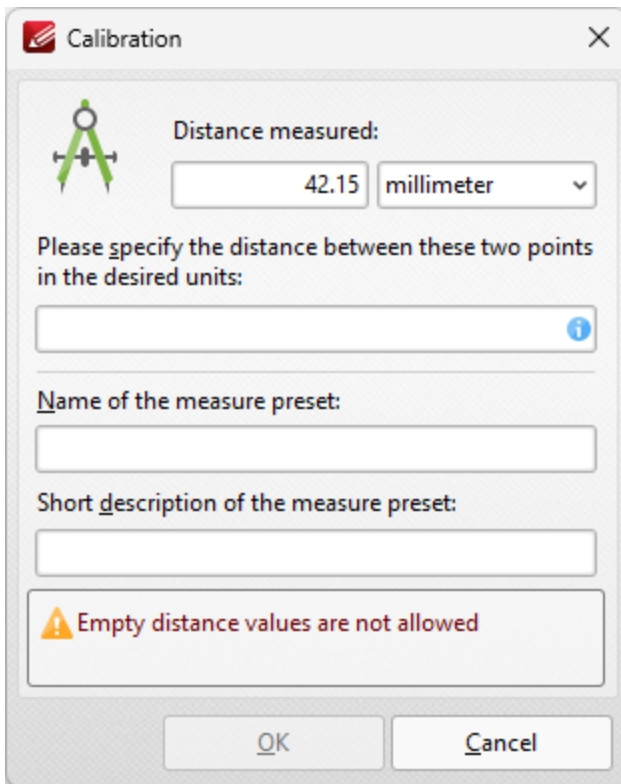
Figure 3. Calibration Dialog Box

- The distance determined in the document is detailed in the upper number box. Use the dropdown menu to select the desired units of measurement.
- Use the lower number box to determine the scale. Enter a numerical value and the desired units of measurement for the scale.
- Name and describe the calibration. The scale is detailed in **Scale** pane.

Click **OK** to save the calibration.

The keyboard shortcut to enable this feature is Ctrl+Shift+C.

5.7.6 **Link Tools**

Link Tools

Hover over **Link Tools** to open the following submenu:
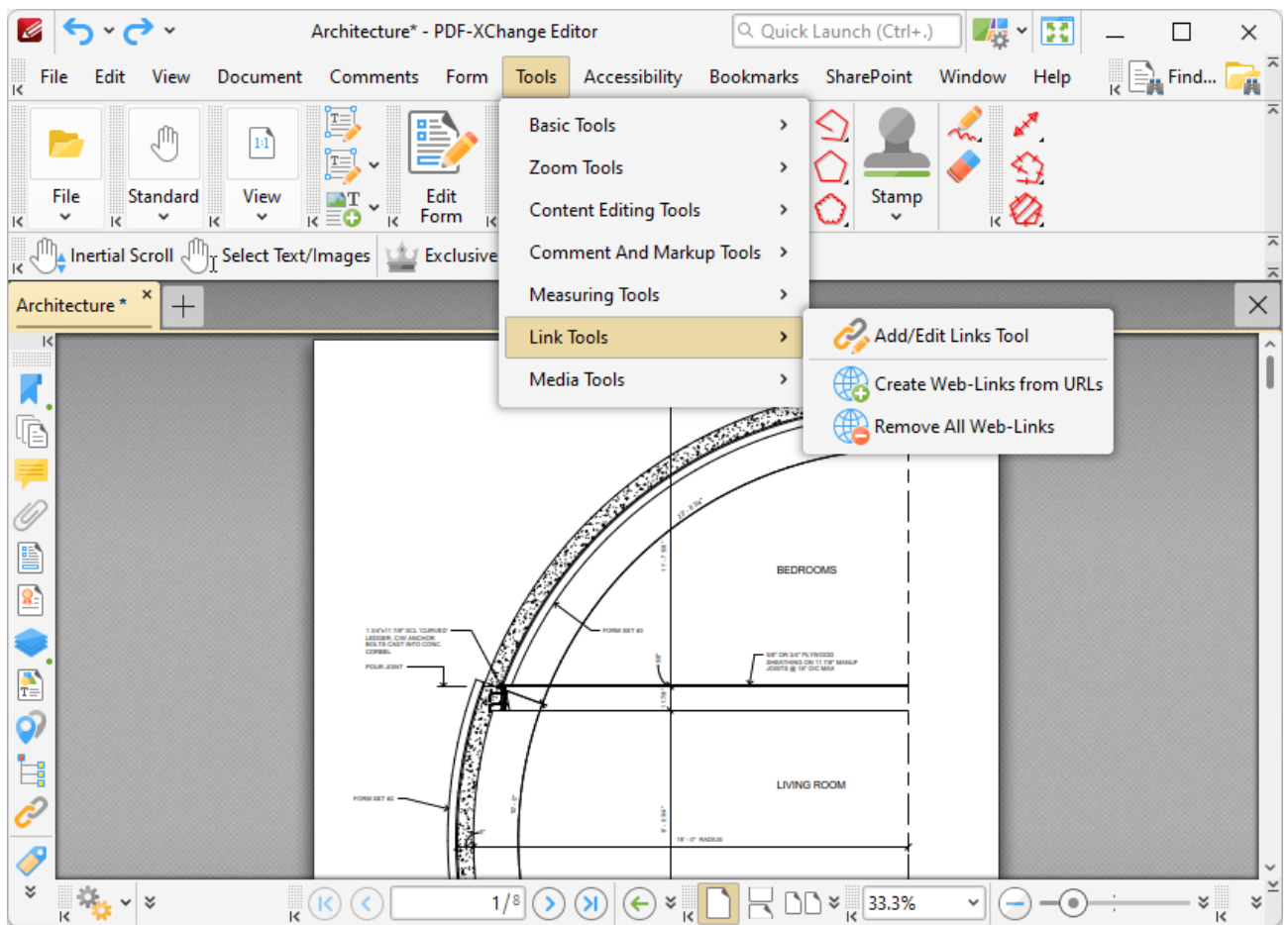
Figure 1. Tools Tab Submenu, Add/Edit Link Tool

These tools are used to create/remove weblinks:

Add/Edit Link Tool

The **Add/Edit Link Tool** is used to create links. When it is selected the pointer becomes a crosshairs icon. Click and drag to determine the location and size of the link:
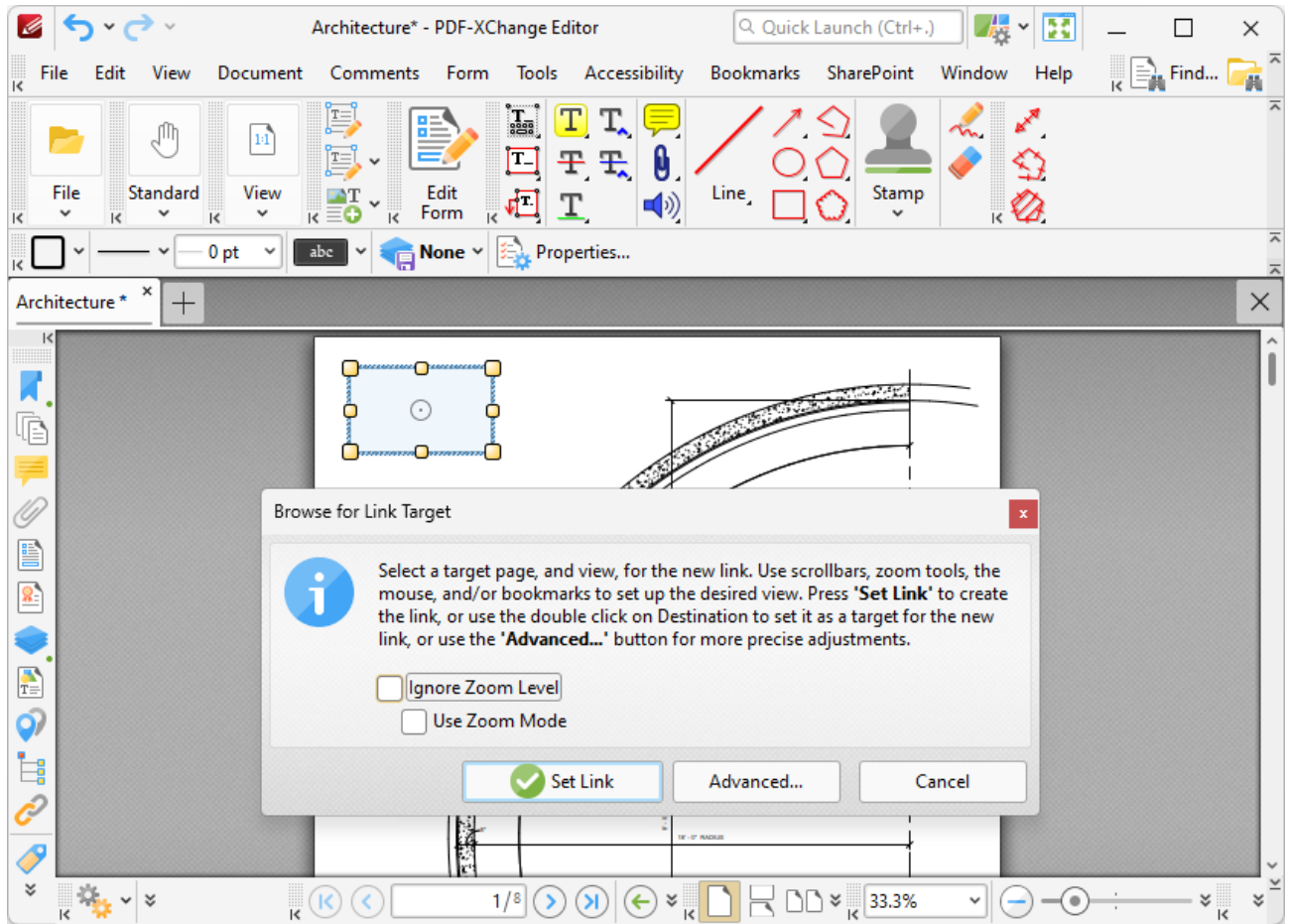
Figure 2. Add Link Example

- Click and drag the yellow control points to resize links.
- Click and drag link boxes to reposition them. Alternatively, the arrow keys can be used for this purpose. Hold down Shift to move at an increased increment when using the arrow keys.
- Use the editing aids detailed **here** 610 to assist in the precise placement of links.
- Right-click links for further options. See **here** 1120 for an explanation of these options.
- When the **Add/Edit Link Tool** is selected, the following options are enabled in the **Properties Toolbar:** 485
    - **Stroke Color** determines the color of the link border.
    - **Border Style** determines the style of the link border.
    - **Border Width** determines the width of the link border.
    - **Highlight Mode** determines the visual effect when the link is clicked.
    - **Keep Selected** determines whether or not the **Link Tool** remains selected after a link has been created. If this option is enabled then the tool will remain selected and can be used to create several links consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a link.

- Click **Properties** to view/edit additional link properties, as detailed in *(figure 4)* below.

The options in the **Browse for Link Target** dialog box are as follows:

- If the **Ignore Zoom Level** box is selected then **PDF-XChange Editor** will ignore the document zoom level when links are created. If this box is cleared then the zoom level will update to the zoom level that was present at the time of link creation when links are used.
- If the **Use Zoom Mode** box is selected then **PDF-XChange Editor** will ignore the active zoom mode when links are created. If this box is cleared then the zoom mode will update to the mode that was active at the time of link creation when links are used.
- Move to the desired link location and zoom level, then click **Set Link** to create the link.
- Note that when the **Browse for Link Target** dialog box is open, you can also click named destinations in the **Named Destinations** 553 pane to specify them as the target for the link.
- Click **Advanced** to determine advanced settings for links. The following dialog box will open:
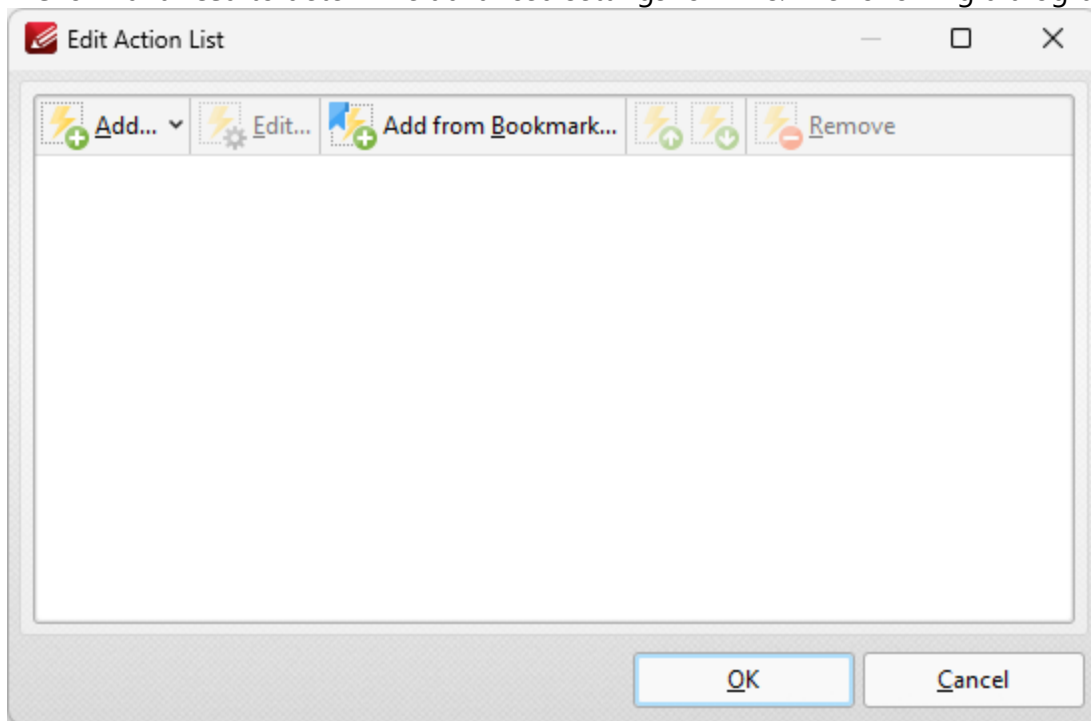
Figure 3. Edit Actions List Dialog Box

- Click **Add** to add actions to the list. Actions will be executed when the link is selected. All available actions are detailed below.
- Select actions and click **Edit** to adjust their settings.
- Click **Add from Boomark** to add **'Go to Page'** actions using link targets from bookmarks.
- Click the arrow icons to move selected actions up or down in the list.
- Click **Remove** to remove selected actions from the list.
- Note that it is possible to add multiple actions to the list. The order of actions in the **Edit Action List** dialog box determines the order in which they are performed.

The following actions are available:

- **Run a JavaScript** 995
- **Go to Page Options** 997 **(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** 1000
- **Open a File** 1002
- **Execute a Command** 1004
- **Reset a Form** 1008
- **Submit a Form** 1010
- **Play a Sound** 1013
- **Go to a 3D/Multimedia View** 1015
- **Show/Hide a Field** 1017
- **Set Layer Visibility** 1019
- **Read an Article**

Please note that the **Add/Edit Link Tool** must be selected in order to edit/delete links. It is also possible to press Ctrl+A in order to select all links in the current document when this tool is enabled.

Link Properties Pane
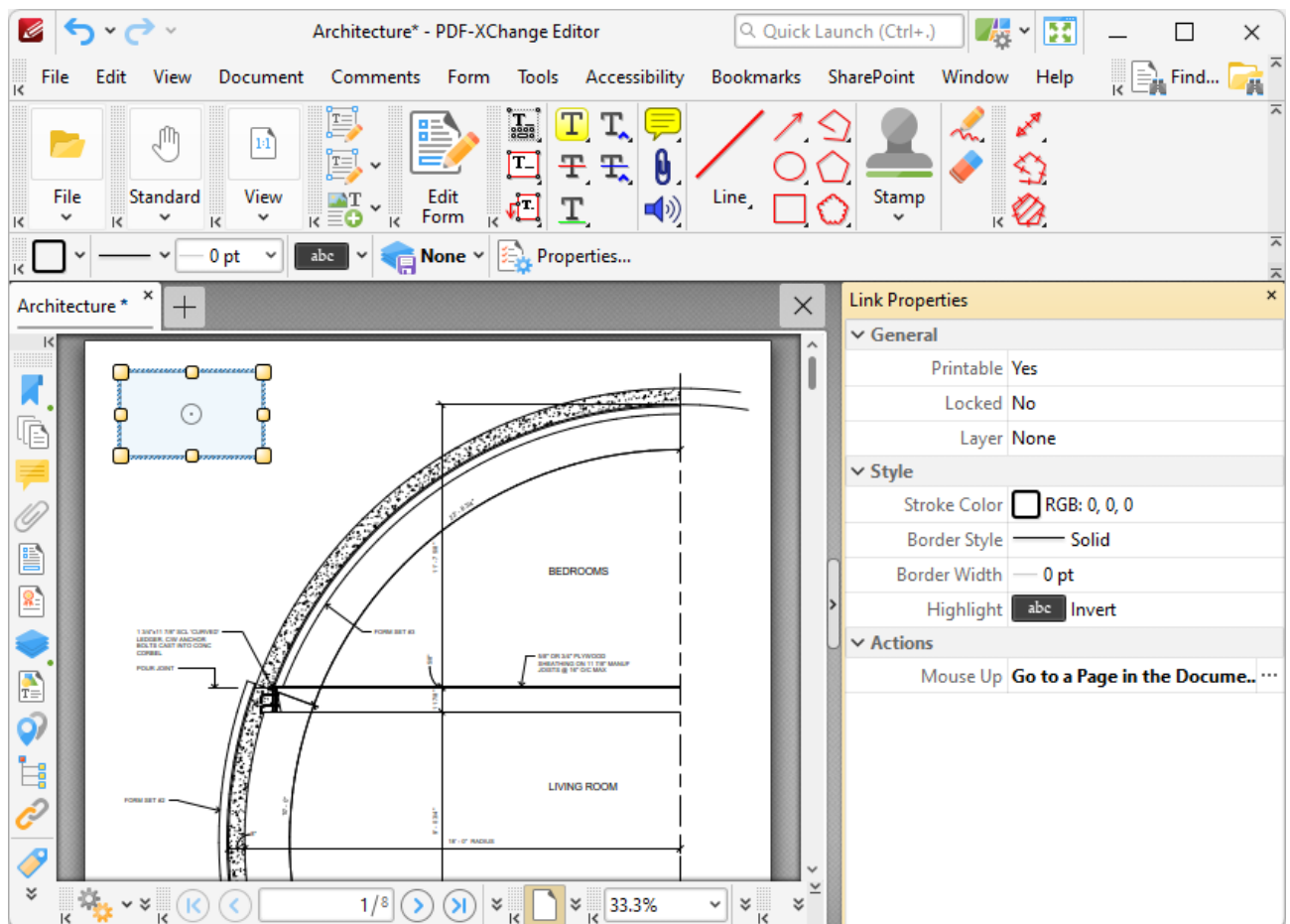
Figure 4. Link Properties Pane

- **Printable** is the print status of the link. If this property is enabled then the link is printed with the document. If this property is not enabled then the link is not printed.
- **Locked** is the locked status of the link. If this property is enabled then the link cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the link belongs. Further information about layers is available **here.** 535
- **Stroke Color** determines the border color of the link.
- **Border Style** determines the border style of the link
- **Border Width** determines the border width of the link.
- **Highlight** determines the visual effect when the link is clicked.
- **Mouse Up** determines the action taken when the link is clicked. Click the ellipsis icon on the right of the action to view/edit/add actions, as detailed above.

Create Web-Links from URLs

Click **Create Web-Links from URLs** to convert existing page text URLs into clickable hyperlinks.

Remove All Web-Links

Click **Remove All Web-Links** to remove existing hyperlinks from page text URLs.

Please note that it is necessary to disable the **Create links from URLs in page text** preference in the **Page Text** preferences for these features to operate in the correct manner:
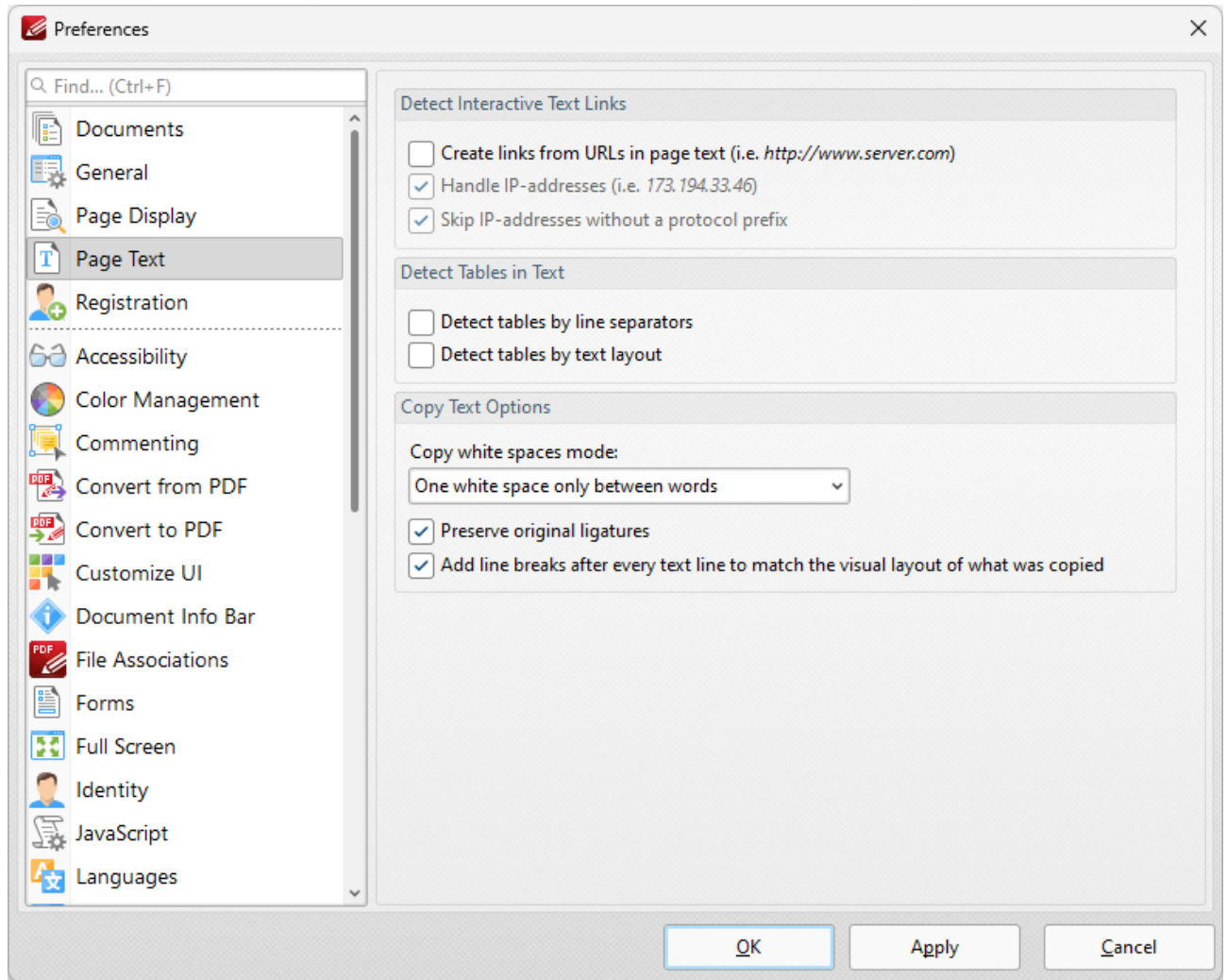
Figure 5. Create Links from URLs in Page Text Preference Disabled

5.7.6.1 Run a JavaScript

___

 Run a JavaScript

___

This action executes JavaScript when links are clicked:
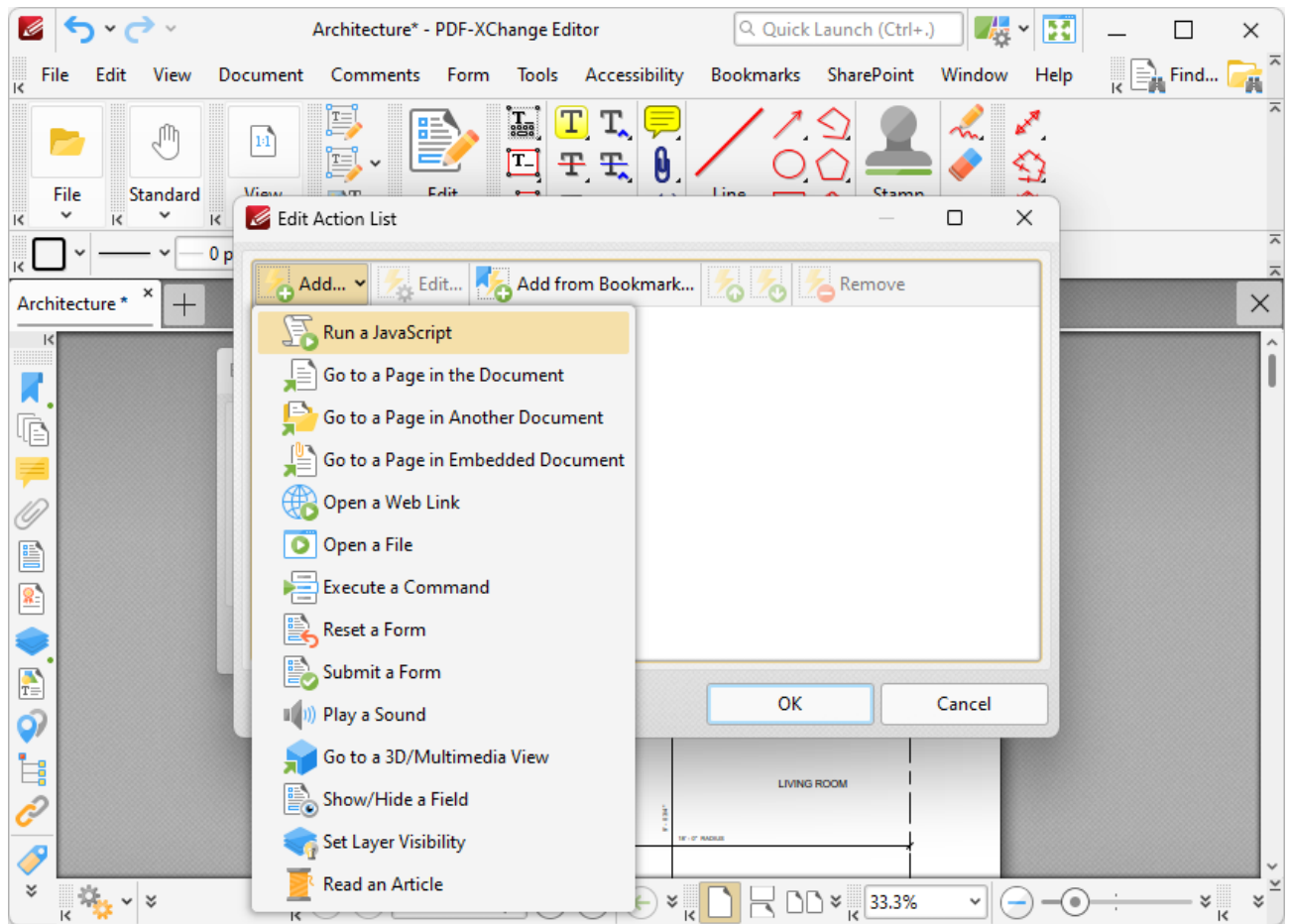
Figure 1. Edit Action List Dialog Box, Run a JavaScript

When it is selected the following dialog box will open:
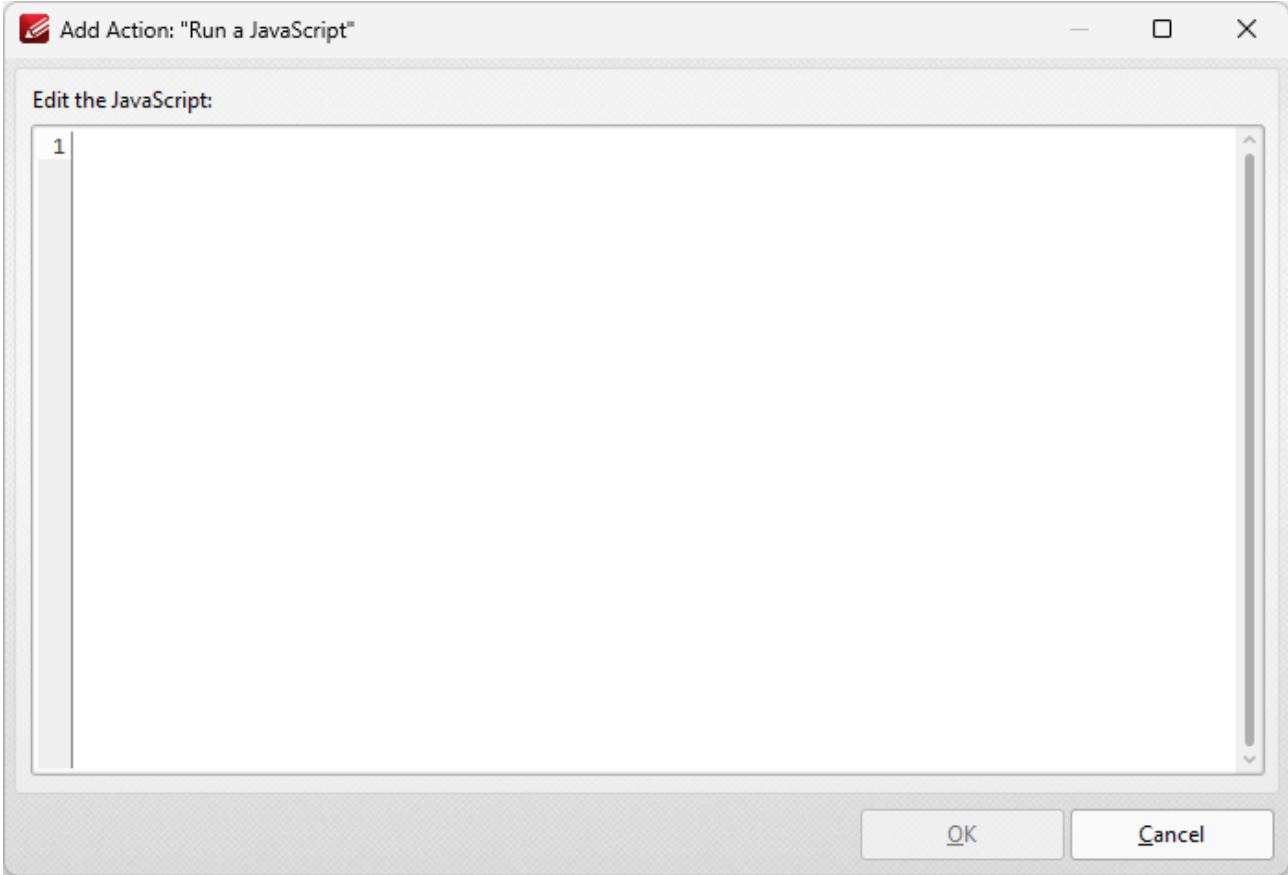
Figure 2. Add Action: "Run a JavaScript" Dialog Box

Enter the desired JavaScript and then click **OK** to save.

5.7.6.2   Go To Page Options

Go To Page Options

There are three **Go To Page** options available for links:
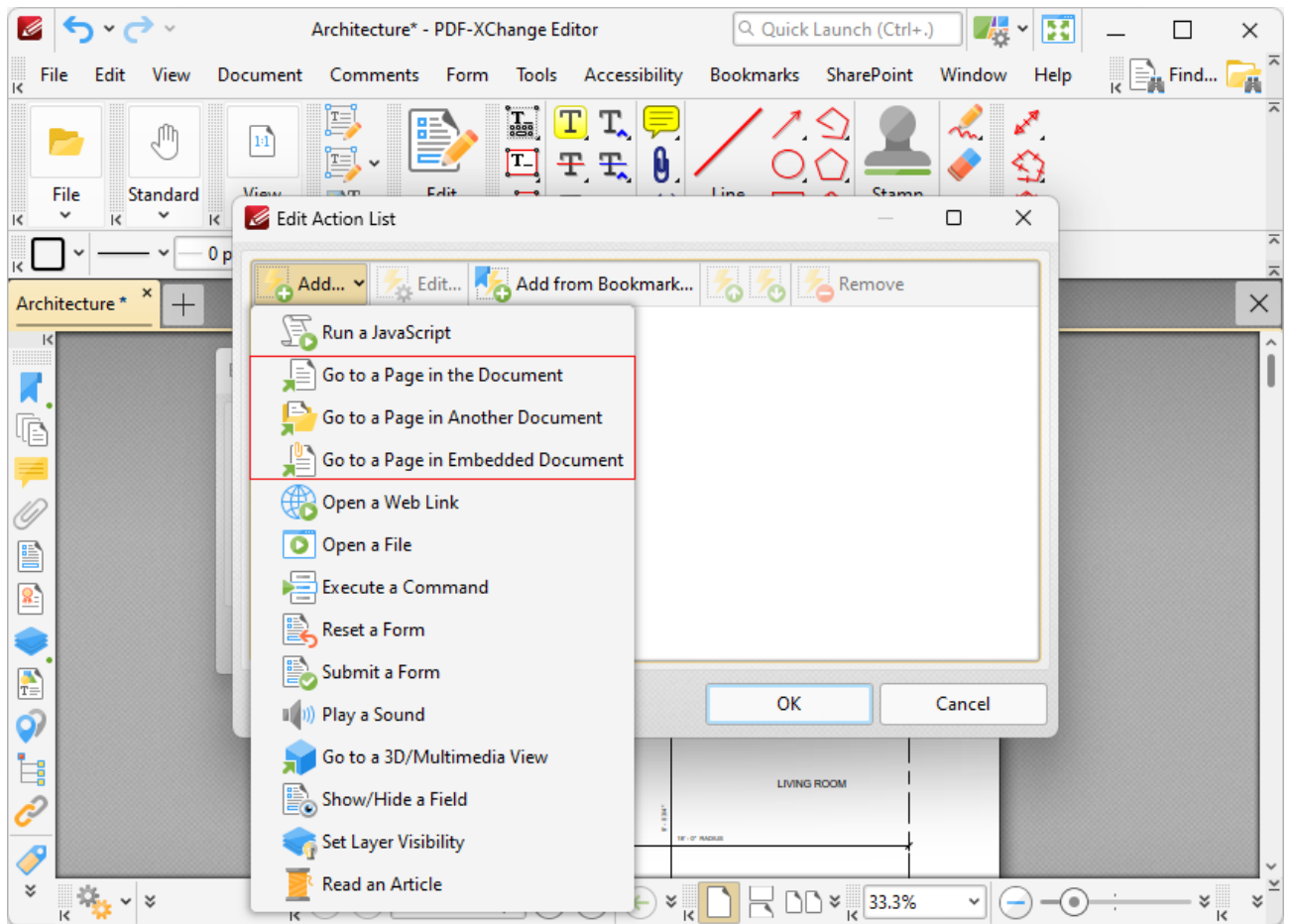
Figure 1. Edit Action List Dialog Box, Go to Page Options

Go To a Page in the Document

This action moves the main window to a different document page when links are clicked. When it is selected the following dialog box will open:
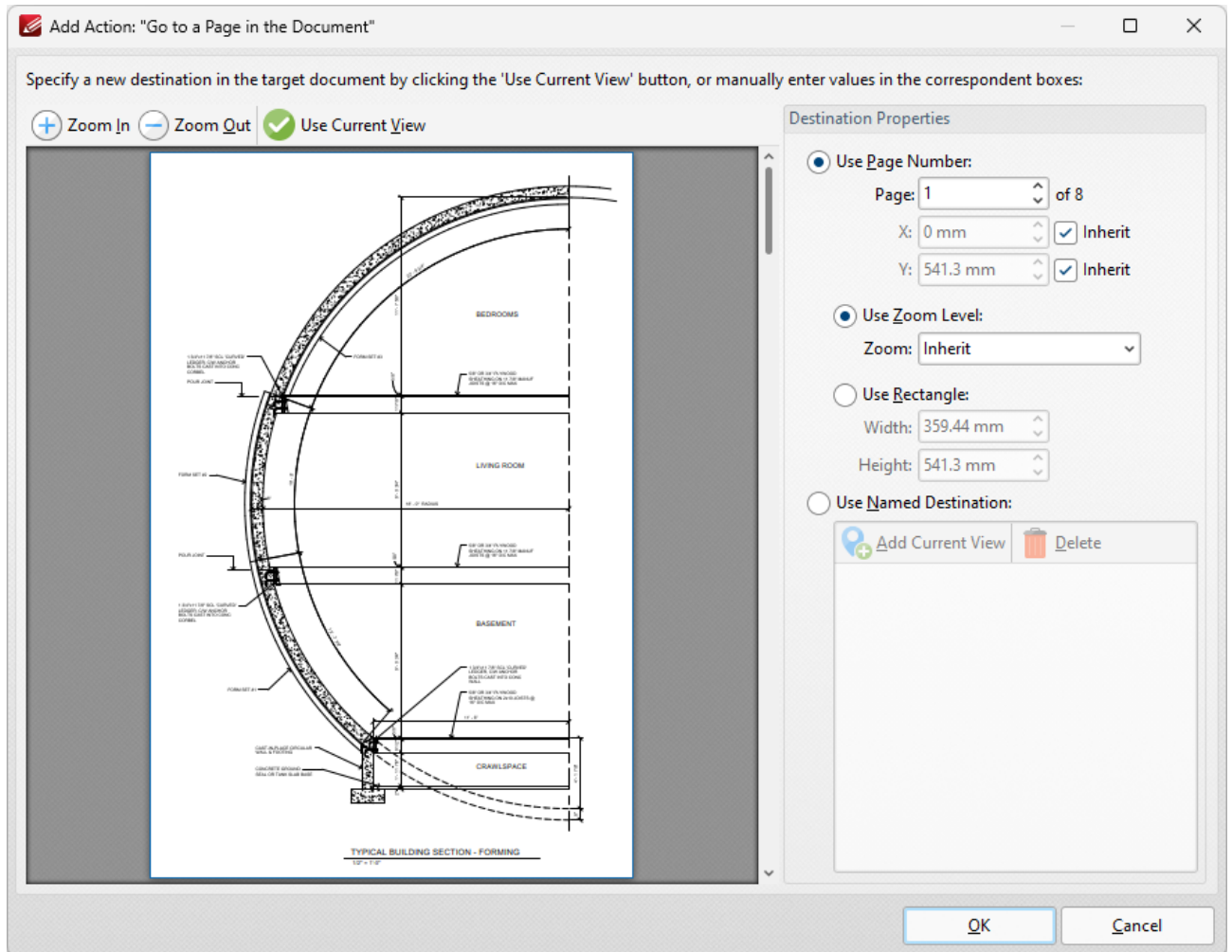
Figure 2. Add Action: "Go to a Page in the Document" Dialog Box

- Click the plus/minus icons to zoom in on/out from the current view.
- Click **Use Current View** to use the view currently displayed in the preview pane as the link destination. Note that this option can be used to link to locations on the same page as the parent link.
- Alternatively, use the **Destination Properties** options to select a page. Enter a page number or use a **Named Destination** 553 to determine the destination:
- Select the **Use Page Number** option button to specify a page number as the link location. The figures entered in the **X** and **Y** boxes determine the location on the horizontal and vertical planes respectively. When this option is used it is also possible to determine the zoom level, or use a rectangle to designate the destination:
  - Select the **Use Zoom Level** button to determine the level of zoom used in the link. Use **Inherit Zoom** to save the zoom level used when creating the link.
  - Select the **Use Rectangle** button to use a rectangle as the link location. Enter values for the **Width** and **Height** as desired.

- Alternatively, select the **Use Named Destination** option button to select a named destination to use as the link location, or click **Add Current View** to create a new named destination from the current view.
- Note that you can use the **Add from Bookmark** option in the **Edit Action List** dialog box to create **Go To Page** actions that use a link target taken from a bookmark.

Click **OK** to save settings.

Go To a Page in Another Document

This action moves the main window to a page in a different document when links are clicked. When it is selected the **Open Files** dialog box will be displayed. Select the file and click **Open.** The **Add Action: "Go to a Page in Another Document"** dialog box will open. The settings are the same as those detailed in *(figure 2).*

Go To a Page in an Embedded Document

This action moves the main window to a different page in an embedded document when links are clicked. When it is selected the **Choose Root Document** dialog box will be displayed. Select either **This document** or **Choose external document**. (When an external document is used, enter the name of the document in the text box or click the folder icon to select a document from the local computer). The **Add Action: "Go to a Page in Embedded Document"** dialog box will open. The settings are the same as those detailed in *(figure 2).*

5.7.6.3 Open a Web Link

 Open a Web Link

This action launches a web link in the default browser when links are clicked:
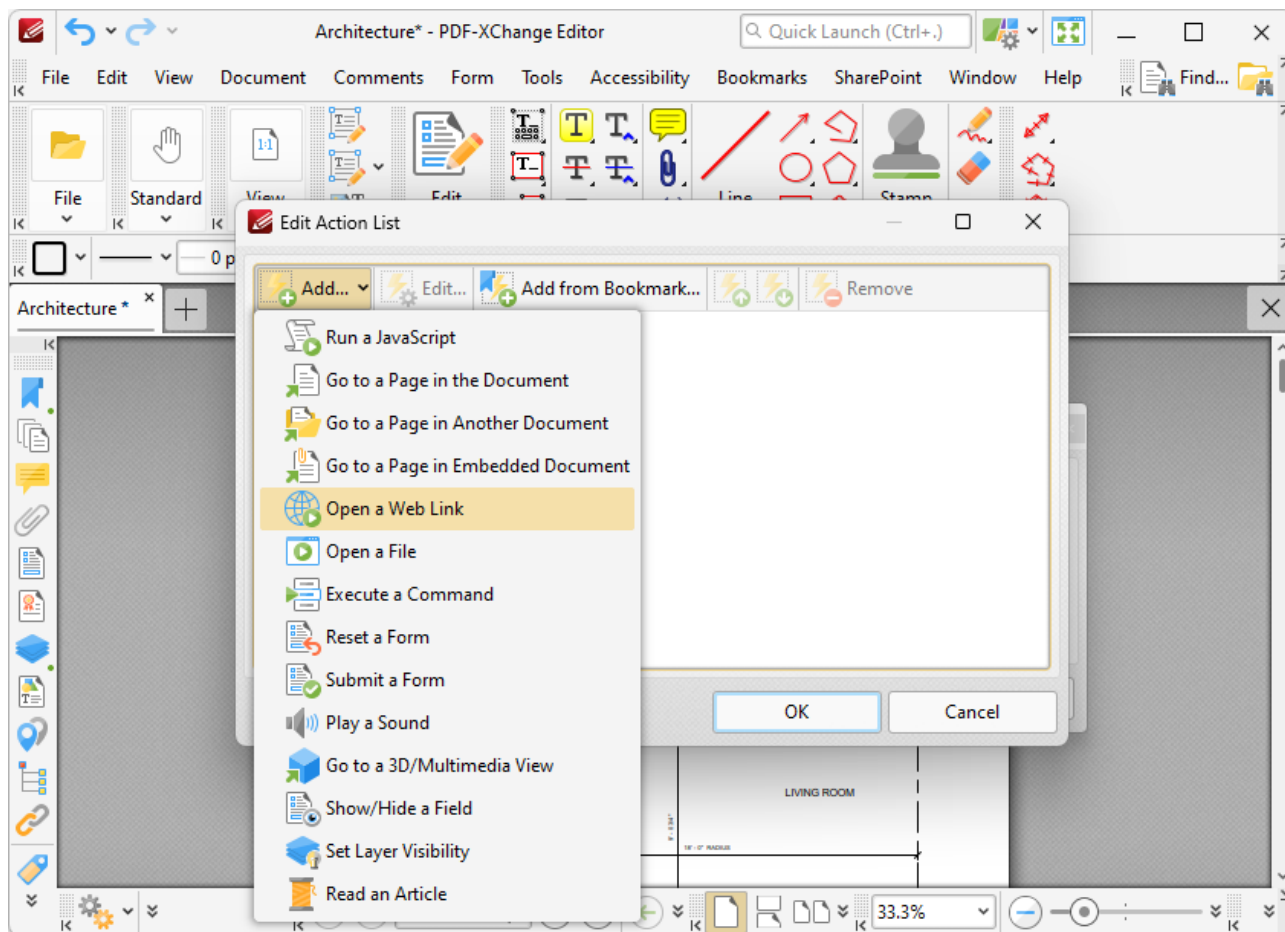
Figure 1. Edit Action List Dialog Box, Open a Web Link

When it is selected the following dialog box will open:
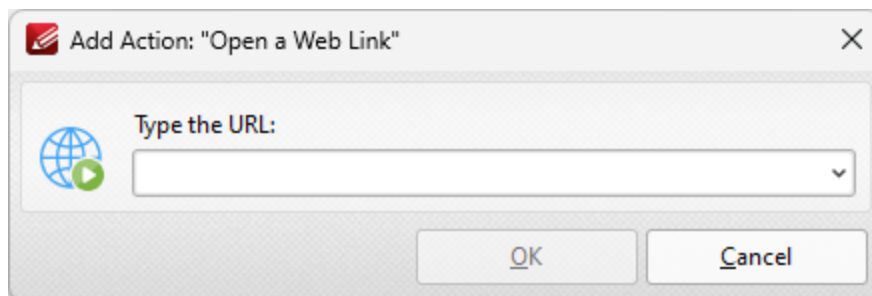
Figure 2. Add Action: "Open a Web Link" Dialog Box

Enter the desired URL in the text box and then click **OK** to save the link.

5.7.6.4 Open a File

Open a File

This action opens a file when links are clicked:
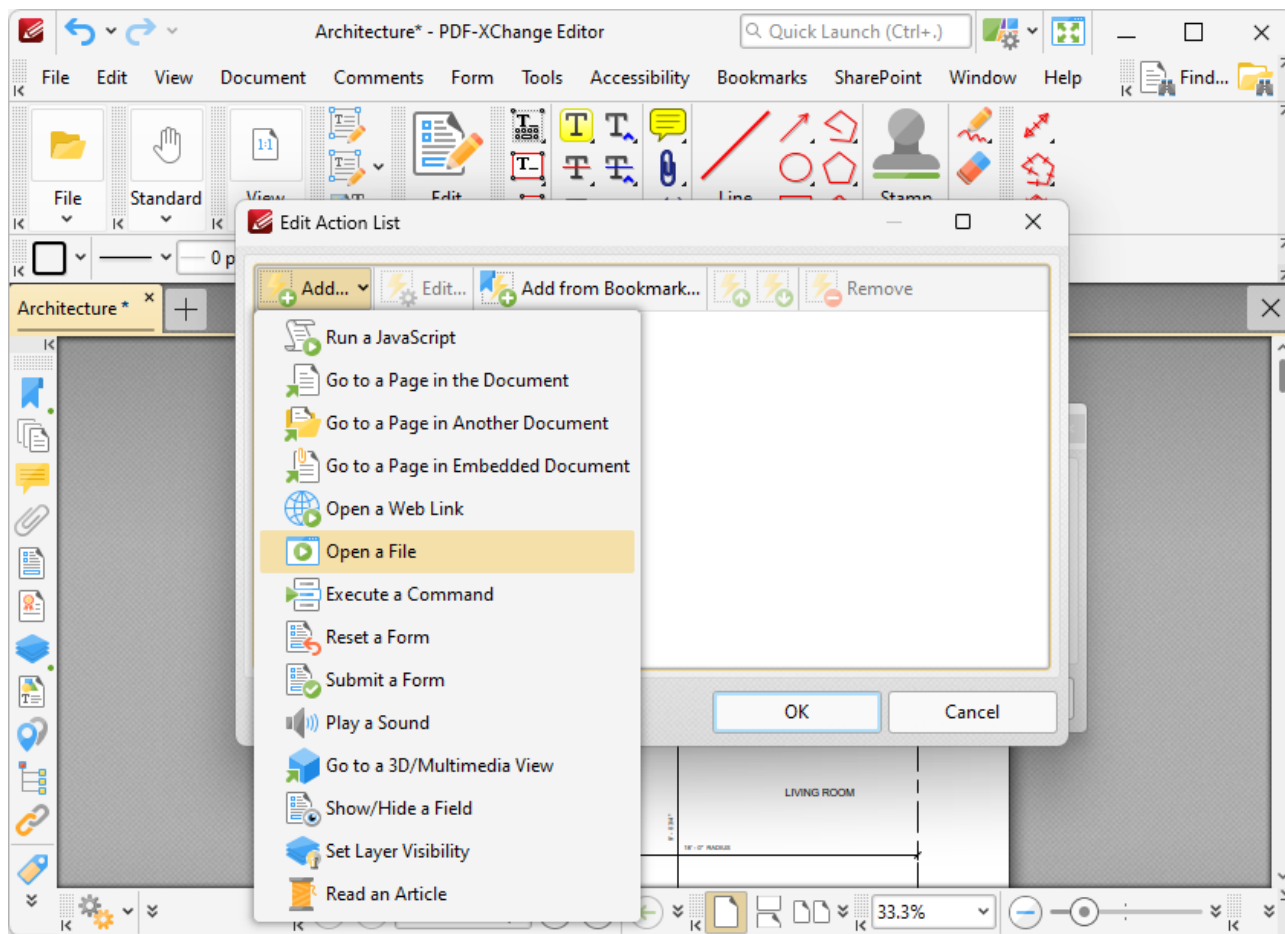
Figure 1. Edit Action List Dialog Box, Open a File

When it is selected the following dialog box will open:
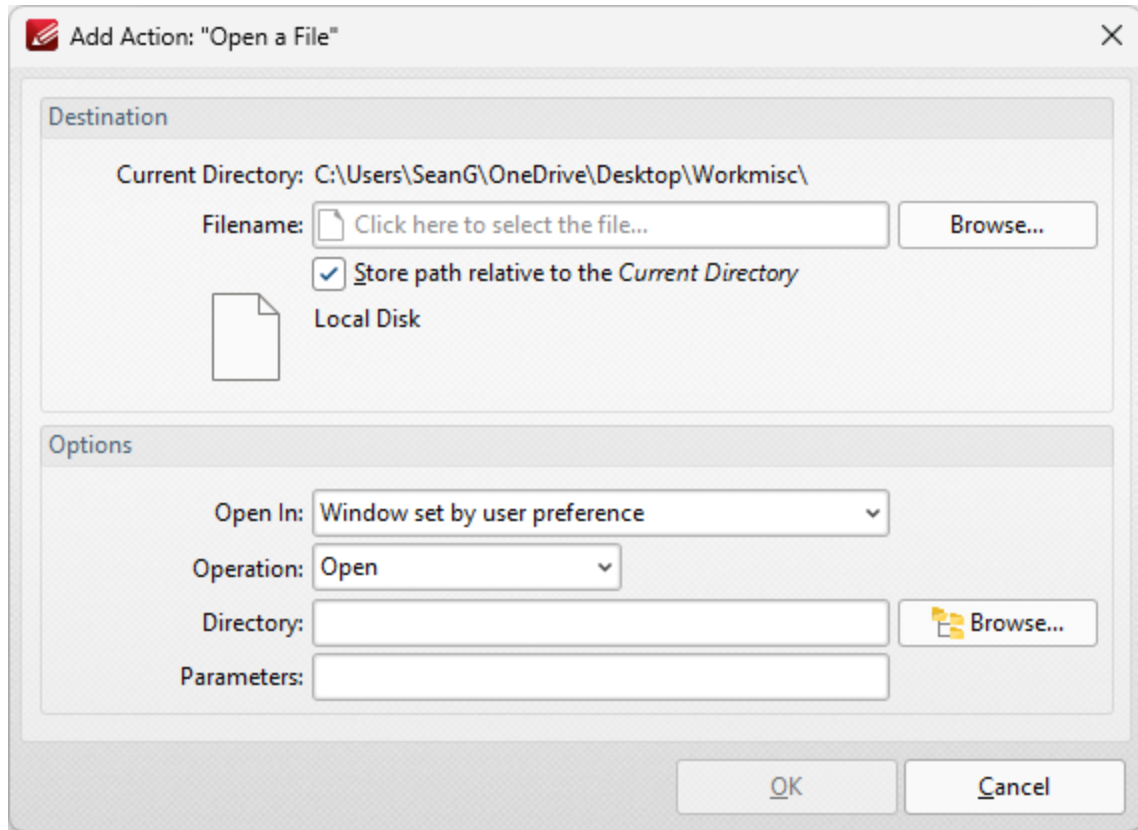
Figure 2. Add Action: "Open a File" Dialog Box

- Enter the name of the file to be opened in the **File Name** text box, or click **Browse** to select a file from the local computer.
- Use the **Open In** menu to select where the file opens.
- Select either **Open** or **Print** in the **Operation** dropdown menu to determine whether the designated file opens or prints when the link is clicked.
- Enter the directory of the file in the **Directory** text box, or click **Browse** to select a folder from the local computer.
- Use the **Parameters** text box to include further parameters of the default program used to open the file. Available parameters depend on the command line options available to the program used.

Click **OK** to save settings.

5.7.6.5   Execute a Command

Execute a Command

This action executes a command when links are clicked:
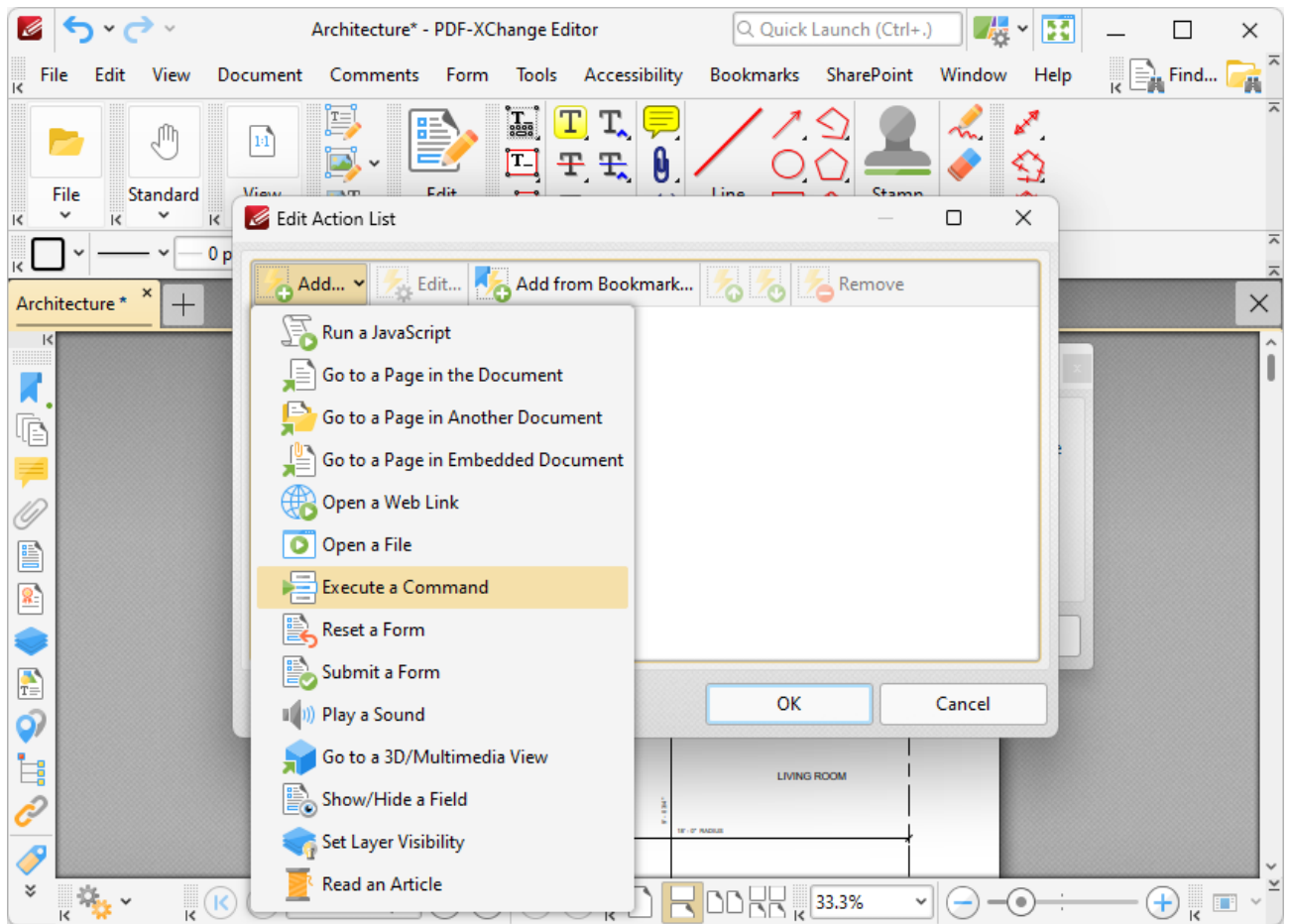
Figure 1. Edit Action List Dialog Box, Execute a Command

When it is selected the following dialog box will open:
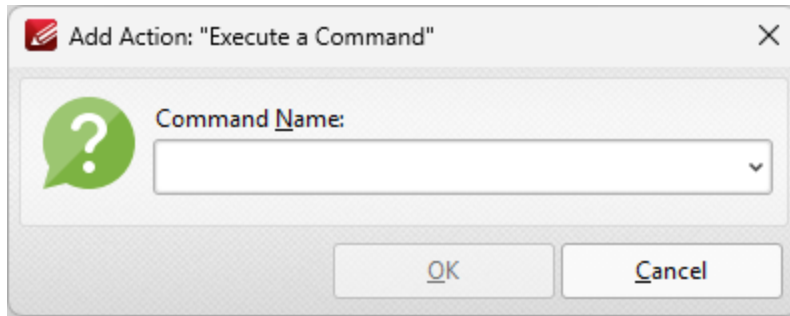
Figure 2. Add Action: **"Execute a Command"** Dialog Box

Click the dropdown arrow for a list of available commands. Select commands and then click **OK** to add them to the link. Note that multiple commands can be added as desired. The following commands are available:

- **AcroForm:Form Data_Export Data -** exports form data to file.
- **AcroForm:Form Data_Import Data -** imports form data from a file.
- **AcroSendMail:SendMail -** emails a copy of the document to a recipient.
- **ActualSize -** sets the zoom level of the document to 100% and shows document pages at their actual size.
- **AddFileAttachment -** adds an attachment to the document.
- **Annots:Tool:InkMenuItem -** enables the **Pencil Tool** for creating freehand annotations.
- **AutoScroll -** enables the autoscroll, which scrolls through documents automatically.
- **COMP:AddBackground -** adds a background to the document.
- **COMP:HeadFoot -** adds headers and footers to the document.
- **COMP:AddWatermark -** adds a watermark to the document.
- **Clear -** deletes the current selection.
- **Close -** closes the document.
- **Copy -** copies the current selection to the clipboard.
- **CopyFileToClipboard -** copies the name and path of the current document to the clipboard.
- **CropPages -** redefines the visible area of the document, and removes content outside of the cropped area as desired.
- **Cut -** cuts the current selection from the document and copies it to the clipboard.
- **DIGSIG:CertifyInvisible -** certifies the document without adding a visible signature.
- **DIGSIG:ClearAll -** clears all digital signatures in the document.
- **DIGSIG:NextSigPullRight -** signs existing/creates and signs a new signature field.
- **DIGSIG:SaveAndAuthenticateTask -** certifies the document and adds a visible signature.
- **DIGSIG:ValidateAll -** validates all digital signatures in the document.
- **DeleteEmptyPages -** deletes empty pages from the document.
- **DeletePages -** deletes pages from the document.
- **Editor:New -** creates a new document.
- **ExtractPages -** extracts pages from the current document to other documents.
- **Find -** finds user-specified text in the current document.

- **FindCurrentBookmark -** expands all parent bookmarks to ensure the visibility of corresponding bookmarks.
- **FindSearch -** opens the advanced search pane.
- **FirstPage -** moves to the first page of the document.
- **FitHeight -** sets the zoom level so the height of the page fits the document window.
- **FitPage -** sets the zoom level so the page fits the document window.
- **FitVisible -** sets the zoom level so the page content fits the document window.
- **FitWidth -** sets the zoom so the width of the page matches the width of the document window.
- **FullScreen -** displays the document in full screen mode.
- **GeneralInfo -** displays the properties of the document.
- **GeneralPrefs -** displays the **Preferences** dialog box.
- **GoBack -** navigates one step backward in the document.
- **GoBackDoc -** navigates to the previous document.
- **GoForward -** navigates one step forwards in the document.
- **GoForwardDoc -** navigates to the next document.
- **GoToPage -** navigates to a specific page of the document.
- **HandMenuItem -** enables the **Hand Tool** for document navigation.
- **InsertPages -** inserts pages from a different document into the current document.
- **LastPage -** navigates to the last page of the document.
- **LoupeMenuItem -** launches the **Loupe Tool** to assist in viewing/editing documents.
- **NewBookmark -** creates a new bookmark that points to the current page.
- **NextPage -** navigates to the next page of the document.
- **OneColumn -** sets the viewing mode to display a single page continuously.
- **Open -** opens a document.
- **PanAndZoomMenuItem -** shows/hides the **Pan and Zoom** pane.
- **Paste -** pastes the current clipboard content into the document.
- **PrevPage -** navigates to the previous page of the document.
- **Print -** prints the current document.
- **Property Toolbar -** show the properties of selected objects.
- **Quit -** exits **PDF-XChange Editor** (and will prompt to save any unsaved changes in the current document).
- **Redo -** redoes the last operation that was undone.
- **ReplacePages -** replaces pages in the current document with pages from a different document.
- **Revert -** reverts the current document to its original state.
- **RotateCCW -** rotates the current view counter-clockwise.
- **RotateCW -** rotates the current view clockwise.
- **RotatePages -** rotates pages in the current document.
- **RotatePagesCCW -** rotates selected pages ninety degrees counter-clockwise.
- **RotatePagesCW -** rotates selected pages ninety degrees clockwise.
- **RotatePagesCW180 -** rotates selected pages one hundred and eighty degrees.
- **Save -** saves the current document.
- **SaveAs -** saves the current document with a new name/location.
- **Scan -** creates a new document using custom scan options.

- **Scan:Create -** inserts new pages into the current document from scanned image files.
- **SelectAll -** selects all items.
- **ShowCoverPage -** displays the first page of documents separately when two-page viewing modes are enabled.
- **ShowGaps -** enables/disables the display of a gap between document pages.
- **ShowGrid -** enables the grid in order to assist with object placement in documents.
- **ShowGuides -** enables the guide line feature in order to assist with lining up objects in documents such as annotations.
- **ShowHideAnnotManager -** shows/hides the **Comments** pane to view/edit document comments.
- **ShowHideArticles -** shows/hides the **Articles** pane.
- **ShowHideBookmarks -** shows/hides the **Bookmarks** pane, to view/edit document bookmarks.
- **ShowHideContentPanel -** shows/hides the **Content** pane, to view/edit document content.
- **ShowHideDestinations -** shows/hides the **Named Destinations** pane, to view/edit named destinations.
- **ShowHideFileAttachment -** shows/hides the **Attachments** pane, to view/edit attachments in the document.
- **ShowHideLinks -** shows/hides the **Links** pane, to view/edit links in the document.
- **ShowHideOptCont -** shows/hides the **Layers** pane, to view/edit optional content layers in the document.
- **ShowHideSignatures -** shows/hides the **Signatures** pane, to view/edit signatures in the document.
- **ShowHideThumbnails -** shows/hides the **Thumbnails** pane, to view/edit thumbnails in the document.
- **ShowRulers -** shows/hides the rulers in order to assist in measuring document objects.
- **SinglePage -** toggles the single-page mode and displays document pages one at a time.
- **SnapToGrid -** enables the snap to grid setting, which means that document content will align to the grid when it is moved manually.
- **TwoColumns -** sets the viewing mode to display two pages continuously.
- **TwoPages -** sets the page-viewing mode to display two pages side-by-side.
- **Undo -** undoes the most recent action.
- **ZoomTo -** sets a custom zoom level for the document.
- **ZoomViewIn -** zooms in on the page.
- **ZoomViewOut -** zooms out from the page.

5.7.6.6   Reset a Form

Reset a Form

This action resets form data when links are clicked:
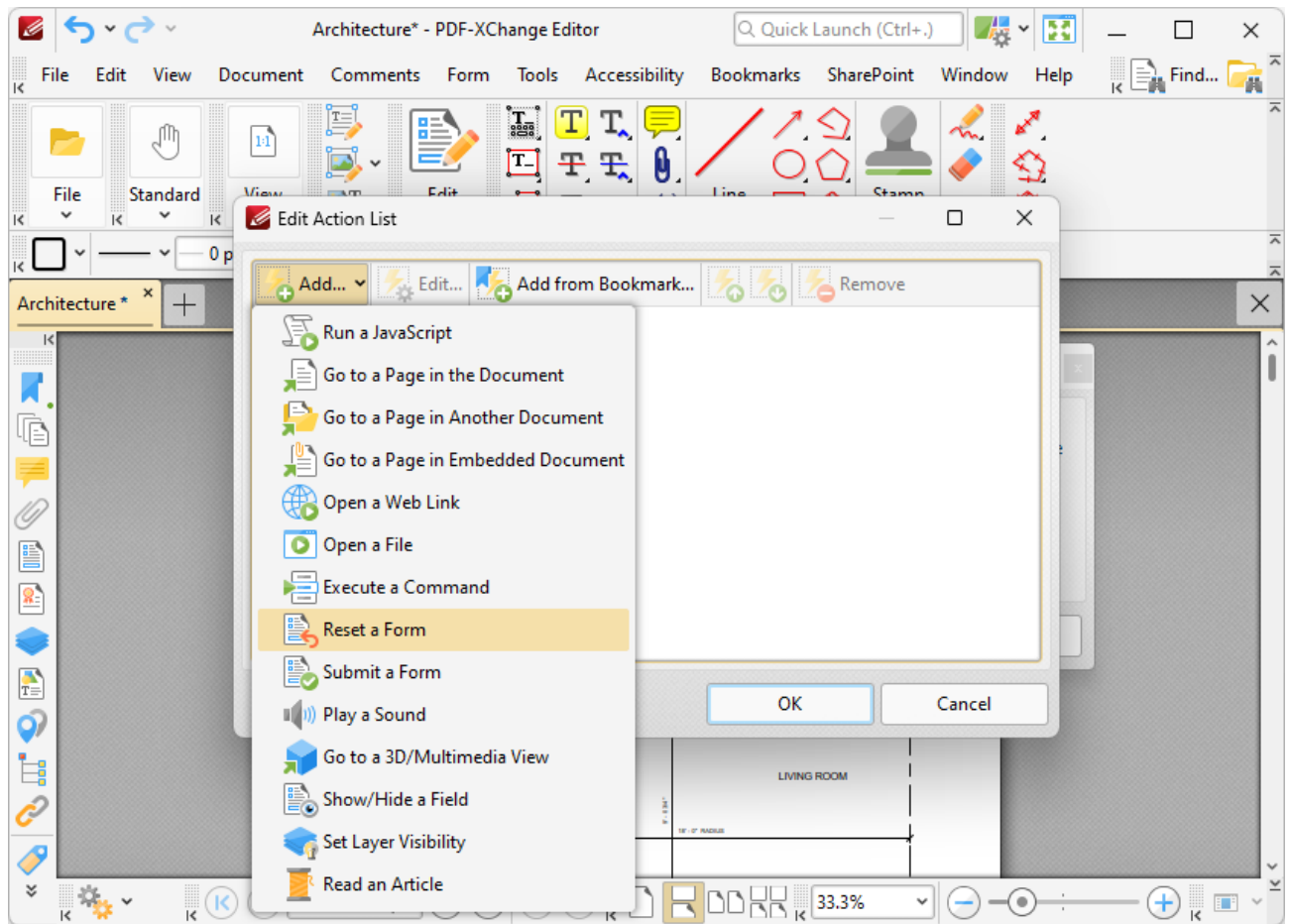
Figure 1. Edit Action List Dialog Box, Reset a Form

Form data is information entered into fillable forms, such as those that the **Form Toolbar** [319] can be used to create in **PDF-XChange Editor.** The following dialog box opens when this action is selected:
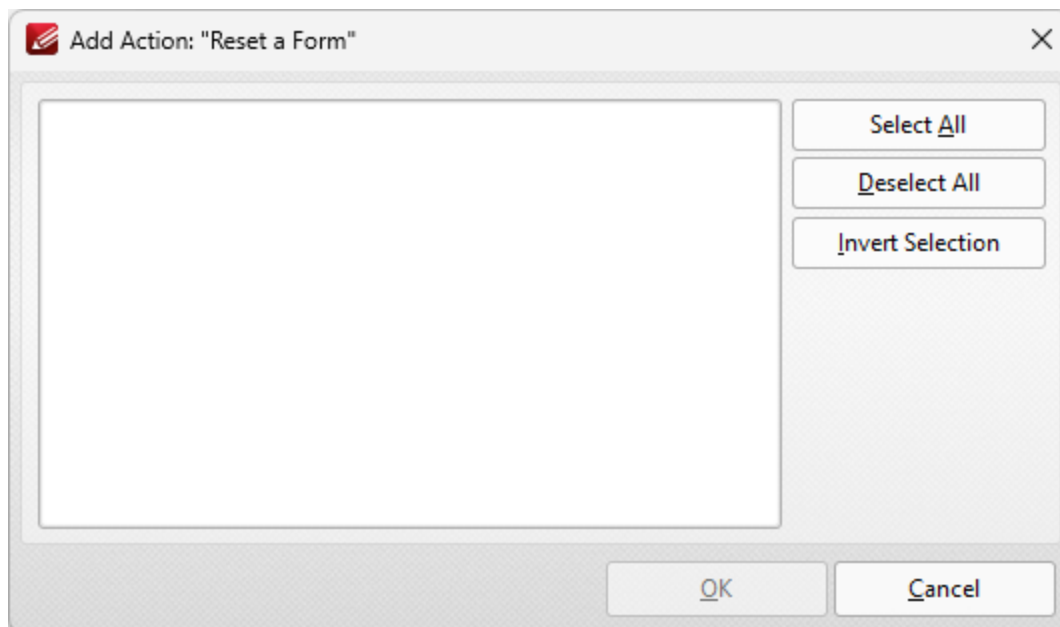
Figure 2. Add Action: "Reset a Form" Dialog Box

- Click **Select All** to select all forms.
- Click **Deselect All** to deselect all forms.
- Click **Invert Selection** to invert the current form selection.

The specified forms will be reset when the link is clicked.

Click **OK** to save settings.

5.7.6.7   Submit a Form

Submit a Form

This action sends specified form data to a URL when links are clicked:
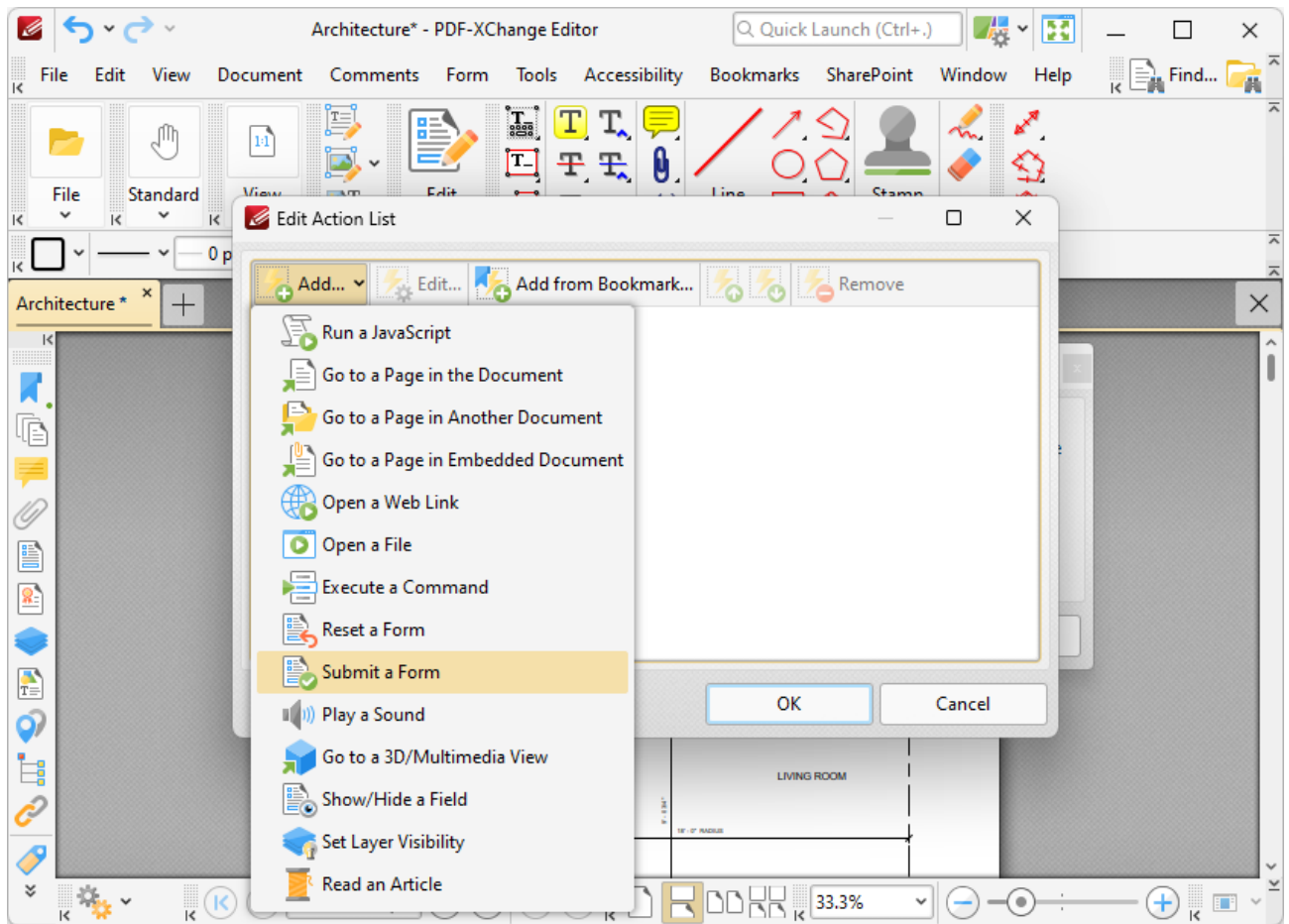
Figure 1. Edit Action List Dialog Box, Submit a Form

When it is selected the following dialog box will open:
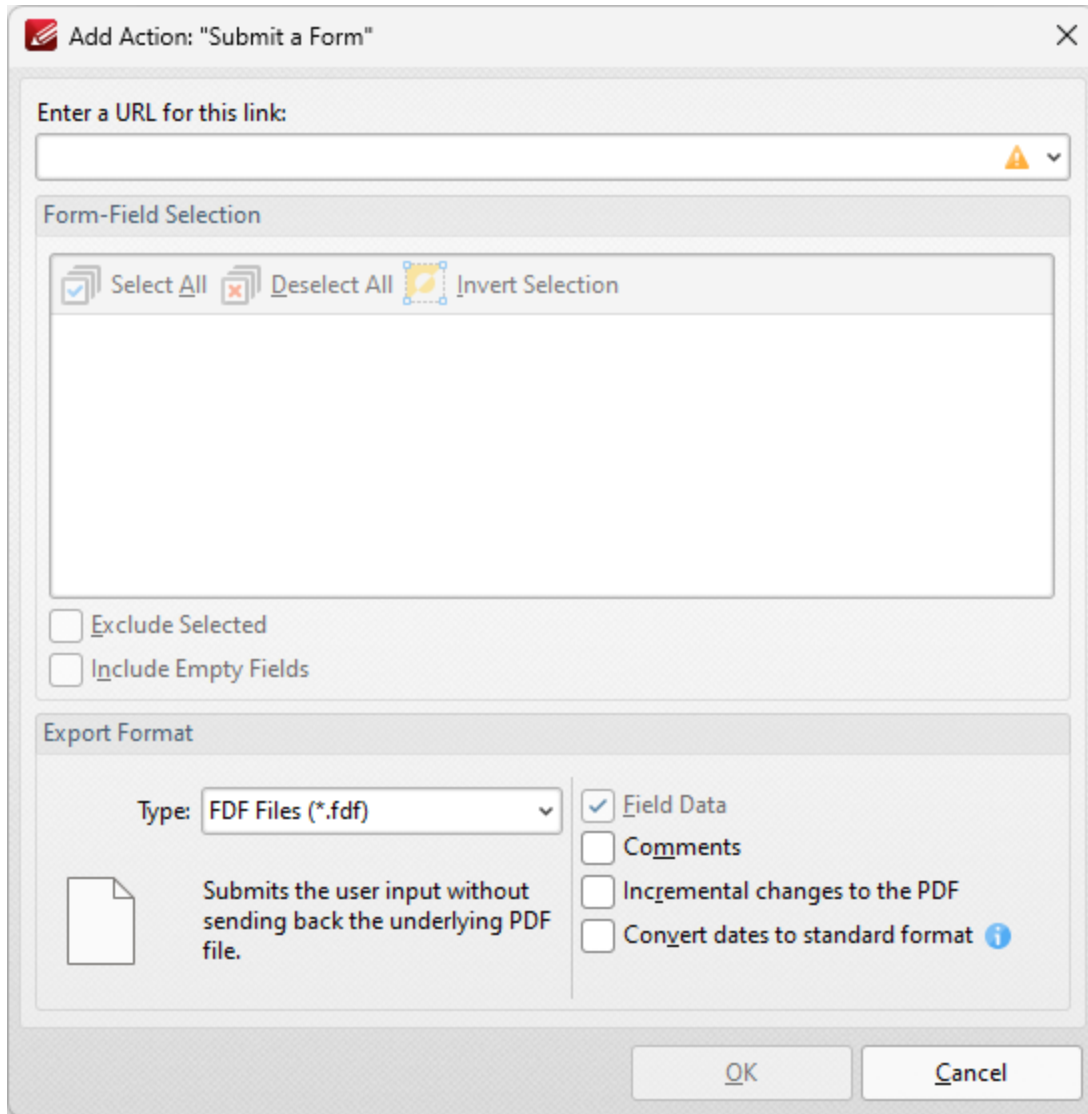
Figure 1. Add Action: "Submit a Form" Dialog Box

- Enter the desired URL in the text box. The specified form data will be sent to this address when the link is clicked.
- All document forms are detailed in the **Form-Field Selection** pane. Use the check boxes to select forms to be sent when the link is clicked.
  - Click **Select All** to select all forms.
  - Click **Deselect All** to deselect all forms.
  - Click **Invert Selection** to invert the current form selection.
  - Select the **Exclude Selected** and **Include Empty Fields** boxes as desired.
- Use the **Export Format** options to determine export format options:
  - Use the **Type** dropdown menu to determine the format of submitted content.
  - Select the **Convert dates to standard format** box as desired.
  - Select the **Field Data, Comments** and/or **Incremental changes** boxes as desired. Selected elements will be included in the submitted content.

Click **OK** to save settings.

Note that the **Form Toolbar** 319 can be used to create/edit forms to use in conjunction with this feature.

5.7.6.8   Play a Sound

Play a Sound

This action plays a sound when links are clicked:
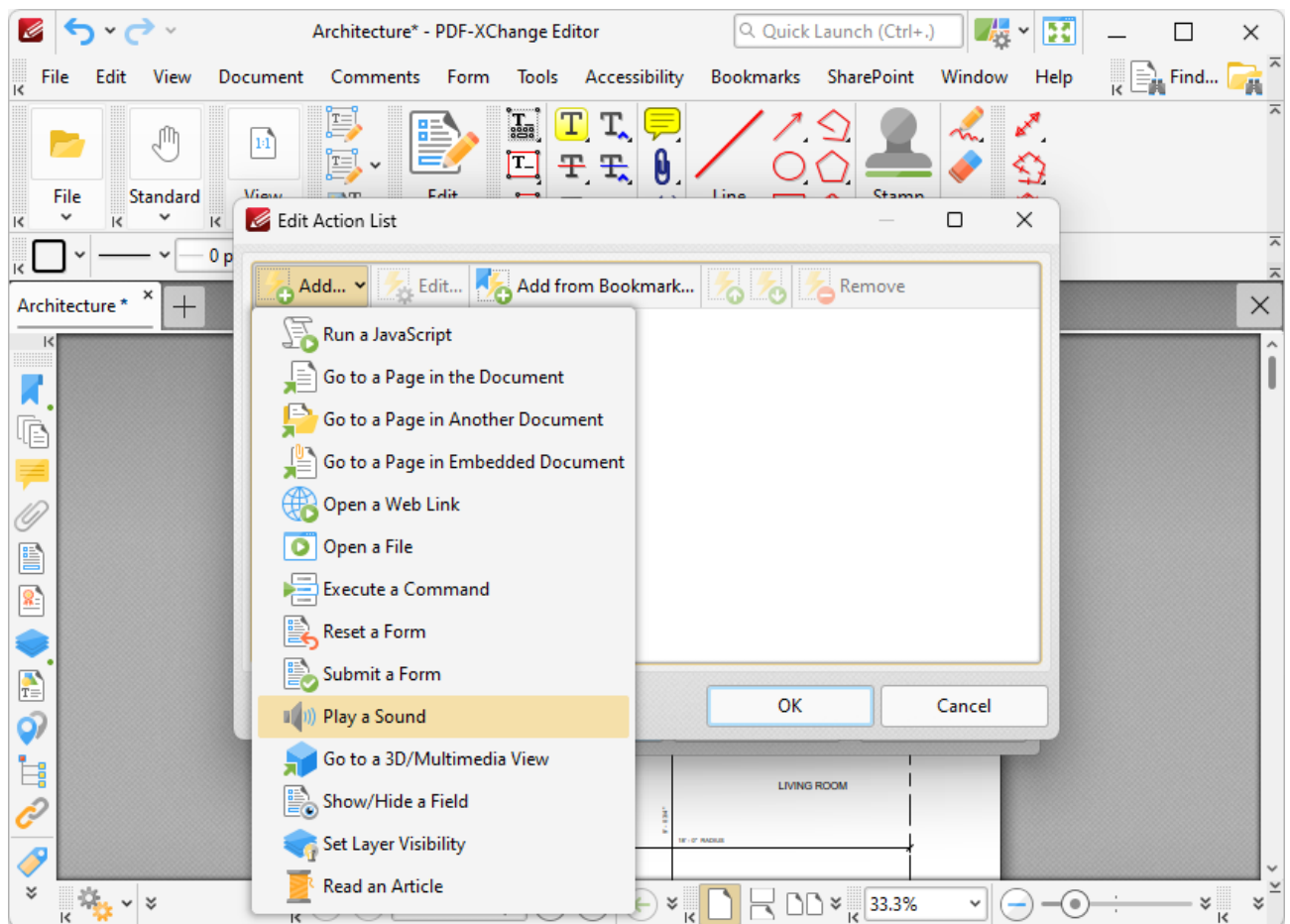
Figure 1. Edit Action List Dialog Box, Play a Sound

When it is selected the following dialog box will open:
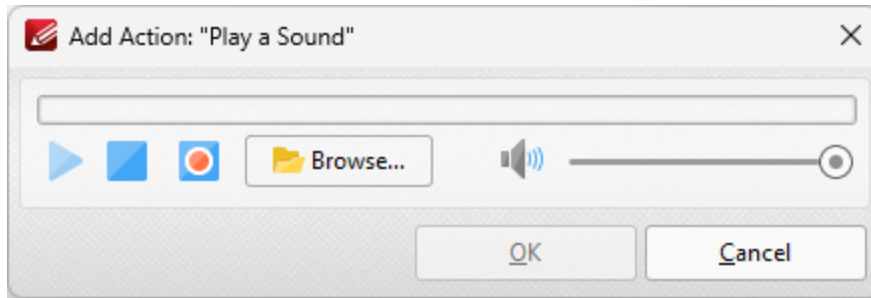
Figure 1. Add Action: "Play a Sound" Dialog Box

- Click the **Browse** button to select a sound file from the local computer. The **Open Files** dialog box will open. Select the desired file and click **Open.** The selected sound file will play when the link is clicked.
- Alternatively, click the record button to record a sound. Click again to finish the recording. Click the play and stop buttons to review the sound. Use the volume slider to adjust the volume of the sound.

Click **OK** to save the file.

5.7.6.9   Go to a 3D/Multimedia View

Go to a 3D/Multimedia View

This action moves the main window to a specified 3D/multimedia view:
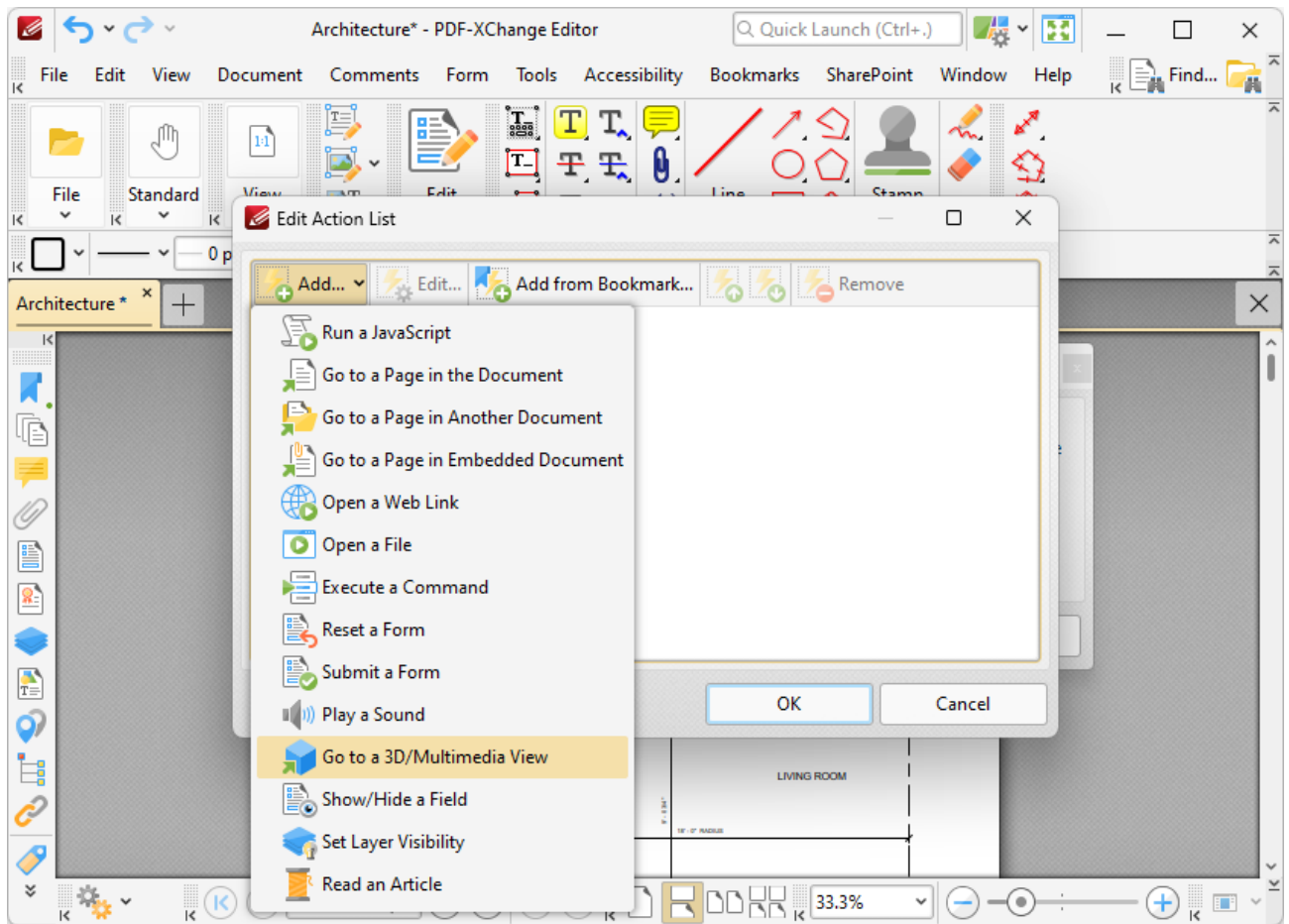
Figure 1. Edit Action List Dialog Box, Go to a 3D/Multimedia View

When it is selected the following dialog box will open:
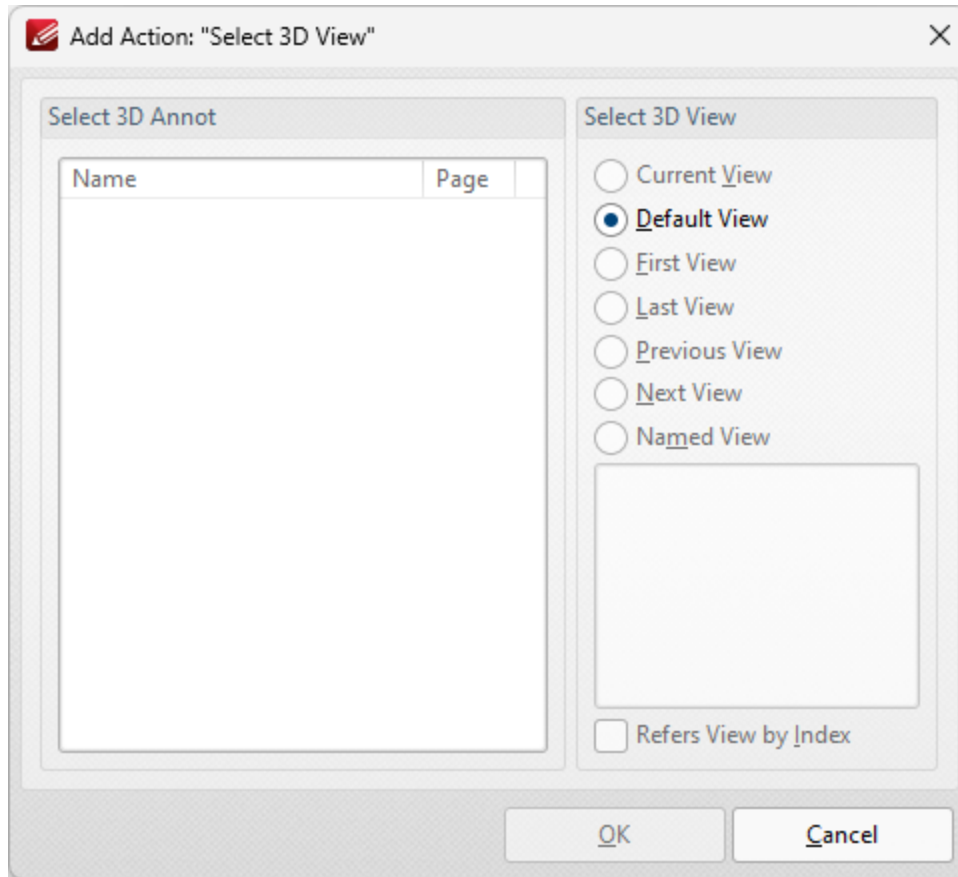
Figure 2. Add Action: "Select 3D View" Dialog Box

- Select the 3D annotation you want the link to open in the **Select 3D Annot** list.
- Select the view of the 3D annotation you want the link to open in the **Select 3D View** list.
- Select **Named View** to specify a named view for the link to open, then select the desired view in the pane.
- Select the **Refers View by Index** box to refer to the view by its index number in the order of 3D views in the document. If this box is not selected then the name of the view is used instead. Note that if the order of objects is subsequently changed then the location at which the link opens will also change.

Click **OK** to save settings.

5.7.6.10 Show/Hide a Field

Show/Hide a Field

This action is used to show/hide form fields when links are clicked:
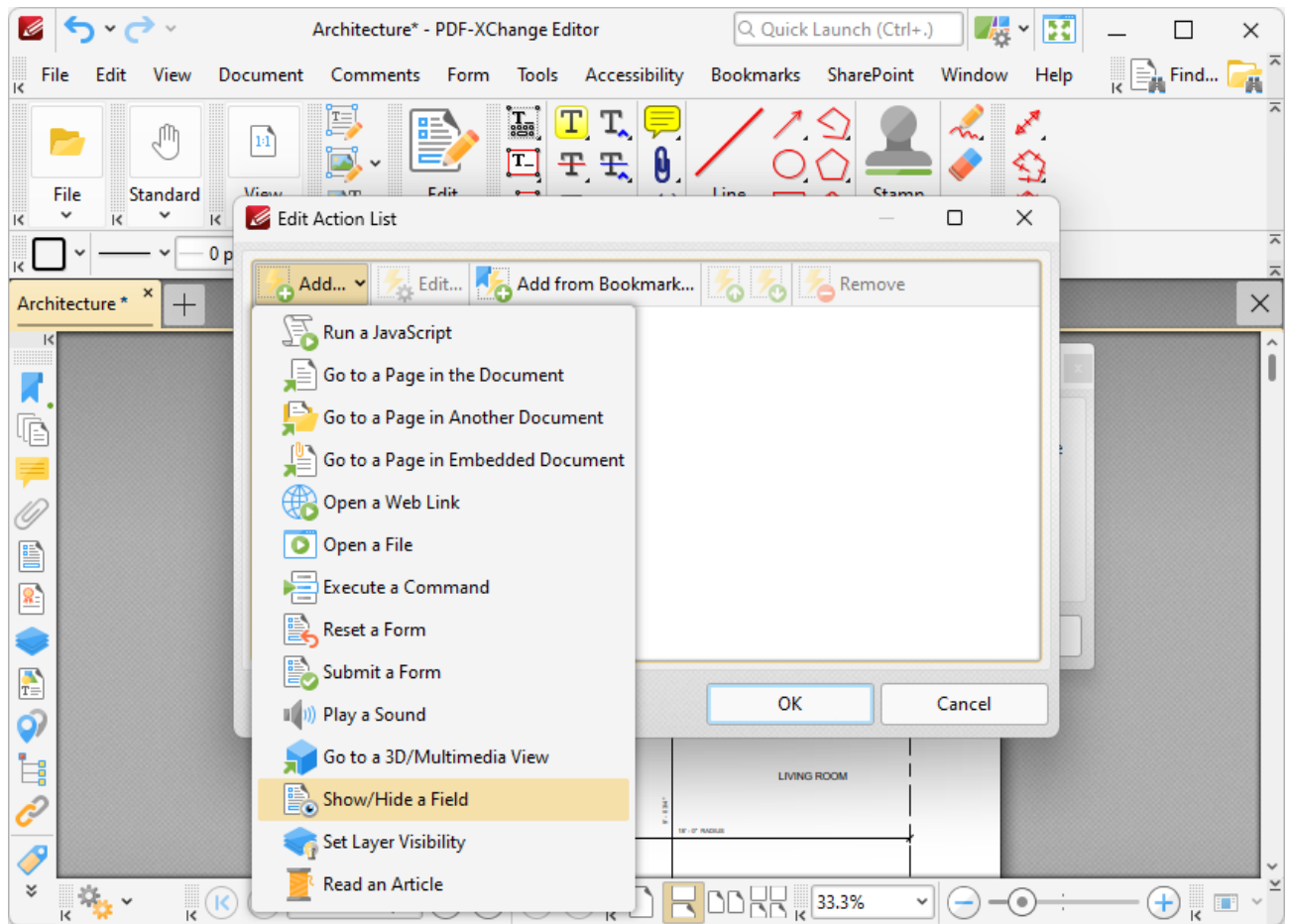
Figure 1. Edit Action List Dialog Box, Show/Hide a Field

When it is selected the following dialog box will open:
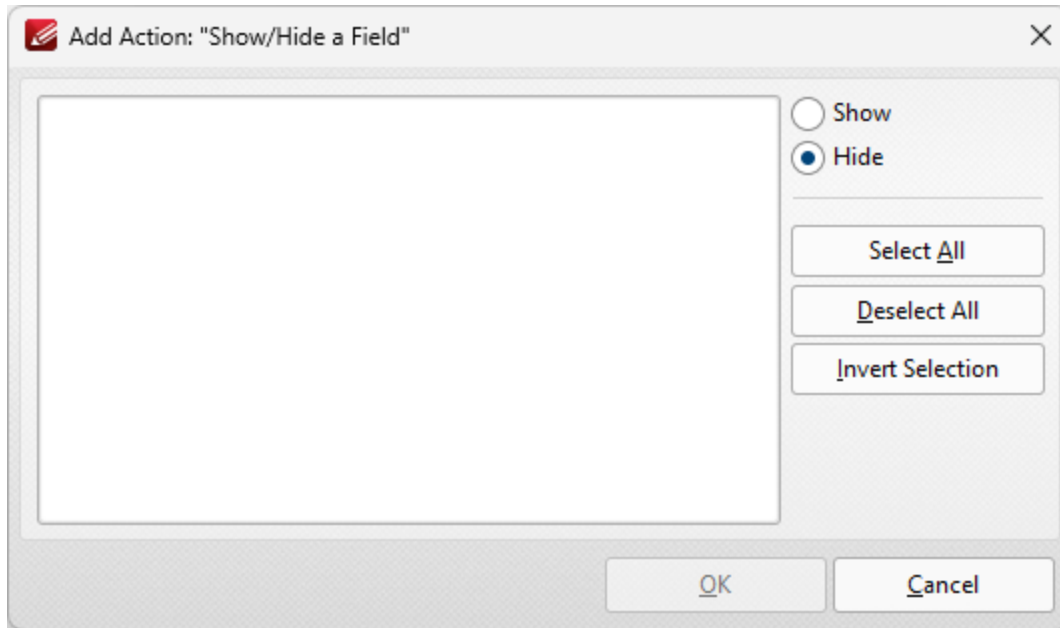
Figure 2. Add Action: "Show/Hide a Field" Dialog Box

All document forms are detailed in the dialog box.

- Select forms and then click either **Show** or **Hide** as desired.
- Click **Select All** to select all forms.
- Click **Deselect All** to deselect all forms.
- Click **Invert Selection** to invert the current form selection.

Click **OK** to save settings.

5.7.6.11 Set Layer Visibility

Set Layer Visibility

This action is used to set layer visibility when links (or form fields/bookmarks that contain actions) are clicked:
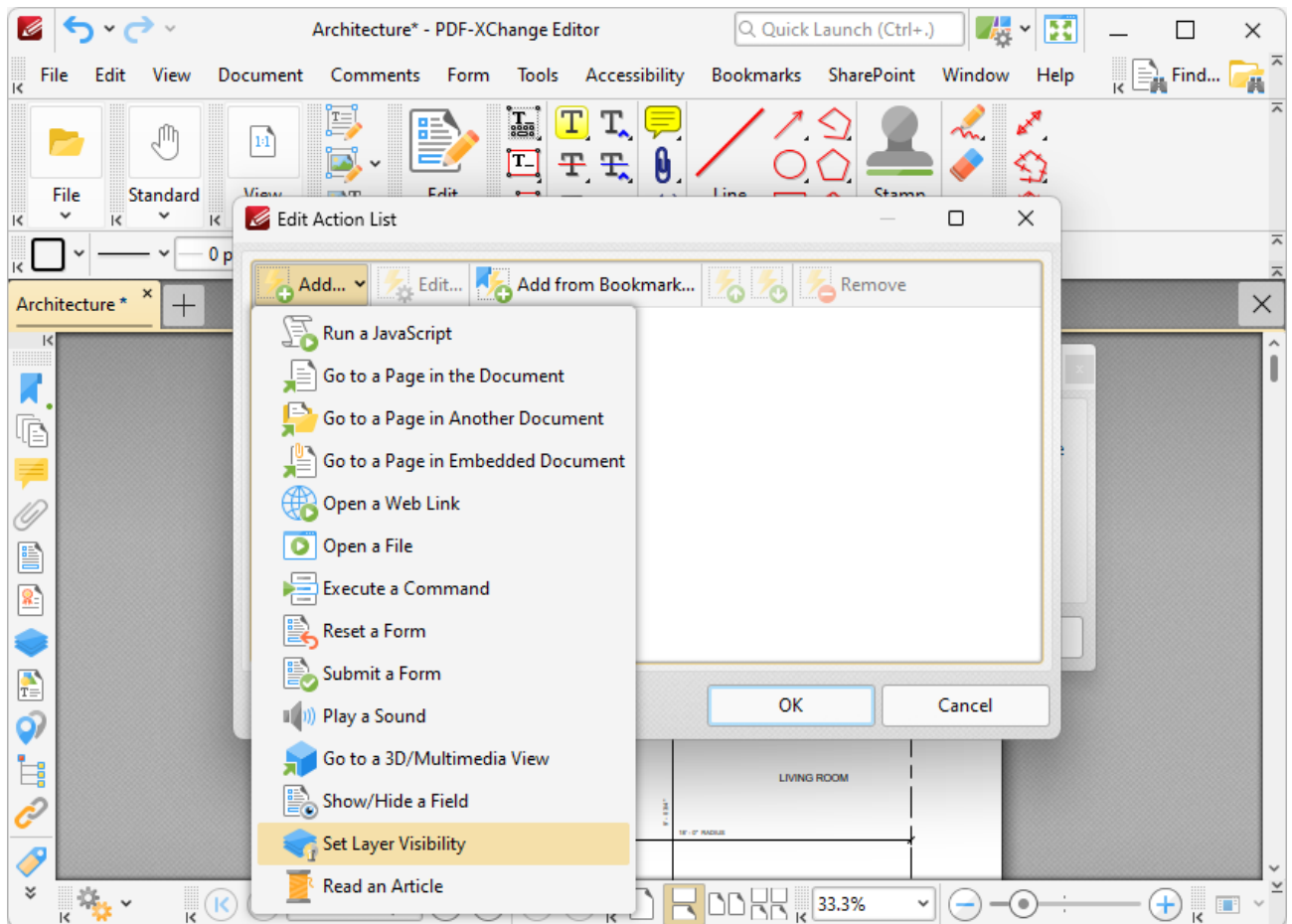
Figure 1. Edit Action List Dialog Box, Set Layer Visibility

When it is selected the following dialog box will open:
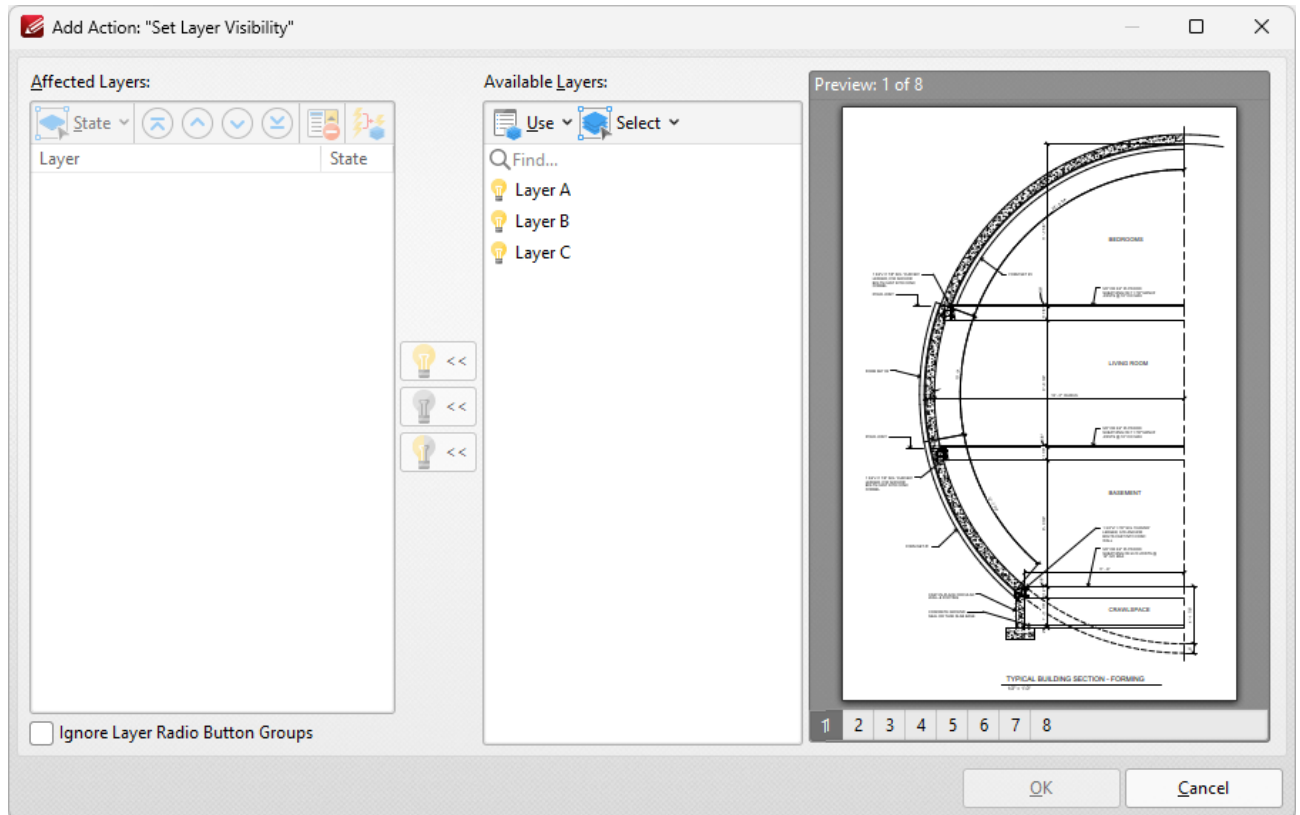
Figure 2. Add Action: "Set Layer Visibility" Dialog Box

Available layers are detailed in the **Available Layers** pane. Please note the following:

- The **Use** dropdown menu can be used to specify either the use of **All Layers** in the document, or only the layers presented in the **Layers** pane.
- The **Select** dropdown menu can be used to **Select All** layers, **Visible** layers or **Hidden** layers, and also to invert the current selection of layers in the dialog box.
- When layers are selected in the **Available Layers** pane, click the lightbulb icons to move them to the **Affected Layers** pane. Layers that are placed into the **Affected Layers** pane are the layers that will be affected when the action executes.
  - Click the activated lightbulb to enable the layer when the action executes.
  - Click the deactivated lightbulb to disable the layer when the action executes.
  - Click the semi-activated lightbulb to toggle the layer when the action executes. This means that enabled layers will be disabled, and disabled layers will be activated in the document when the action executes.
- Use the **State** dropdown menu to change the state of layers in the **Affected Layers** pane. Additionally, the blue arrow icons can be used to move layers up or down in the **Affected Layers** pane.
- Click **Remove** to remove layers from the **Affected Layers** pane.
- Click **Simplify** to simplify layer overrides in the **Affected Layers** pane.
- Select the **Ignore Radio Button Groups** box to ignore radio button groups when this feature is used in conjunction with radio buttons.

Click **OK** to save changes.

5.7.6.12 **Read an Article**

Read an Article

This action is not currently available. It will be available in future builds.

5.7.7   **Media Tools**

 Media Tools

Hover over **Media Tools** to open the following submenu:
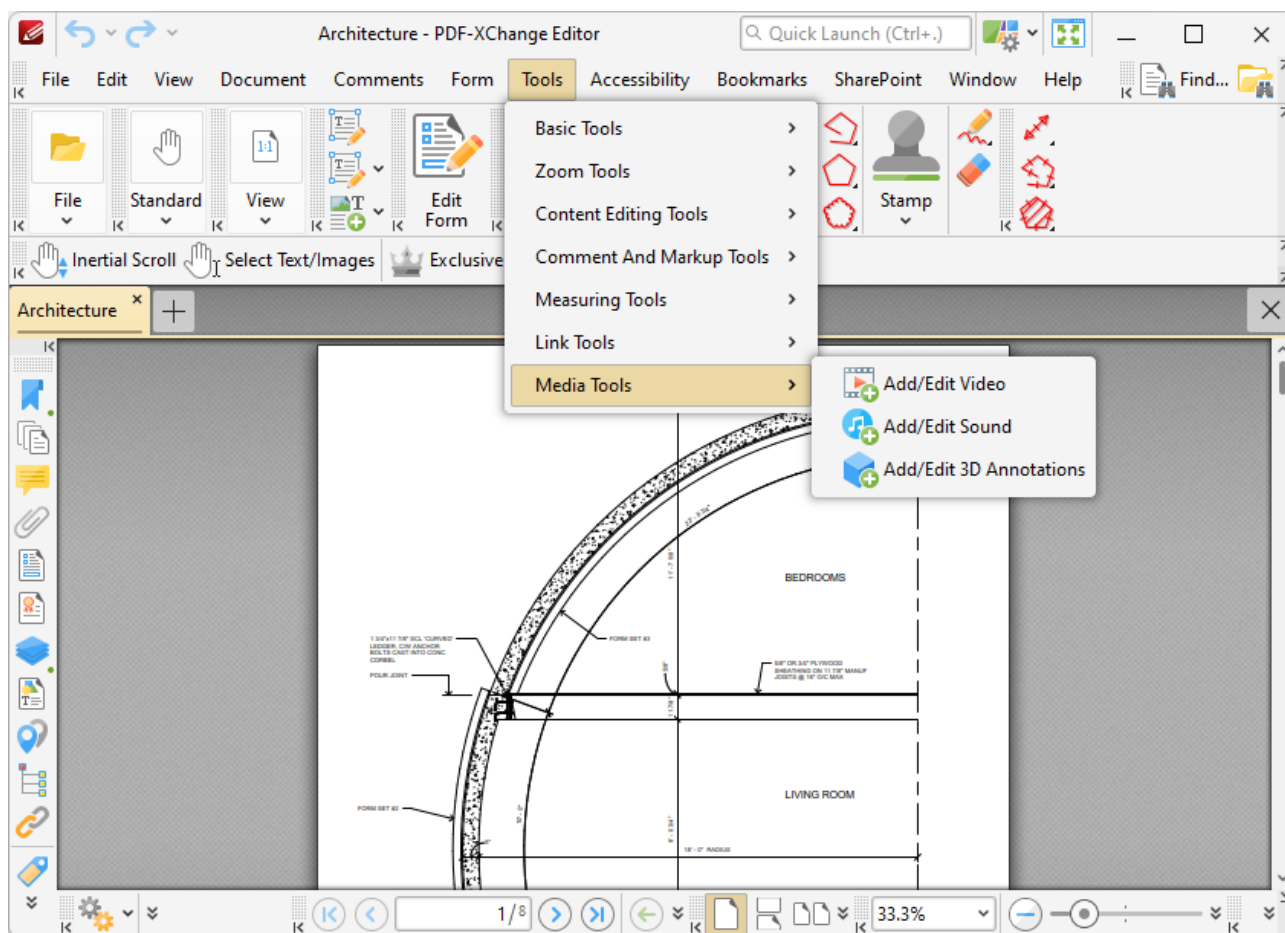
Figure 1. Tools Tab Submenu, Media Tools

These tools are used to add media content to documents:

- **Add/Edit Video Tool** 1025
- **Add/Edit Sound Tool** 1029
- **Add/Edit 3D Annotations** 1033

5.7.7.1 Add/Edit Video Annotations

Add/Edit Video Annotations

Click **Add/Edit Video** to add/edit video annotations:

Figure 1. Comment Tab, Add/Edit Video Highlighted

The pointer will become a crosshairs icon. Click and drag to determine the location at which you want to insert the video annotation. The **Insert Video** dialog box will open:
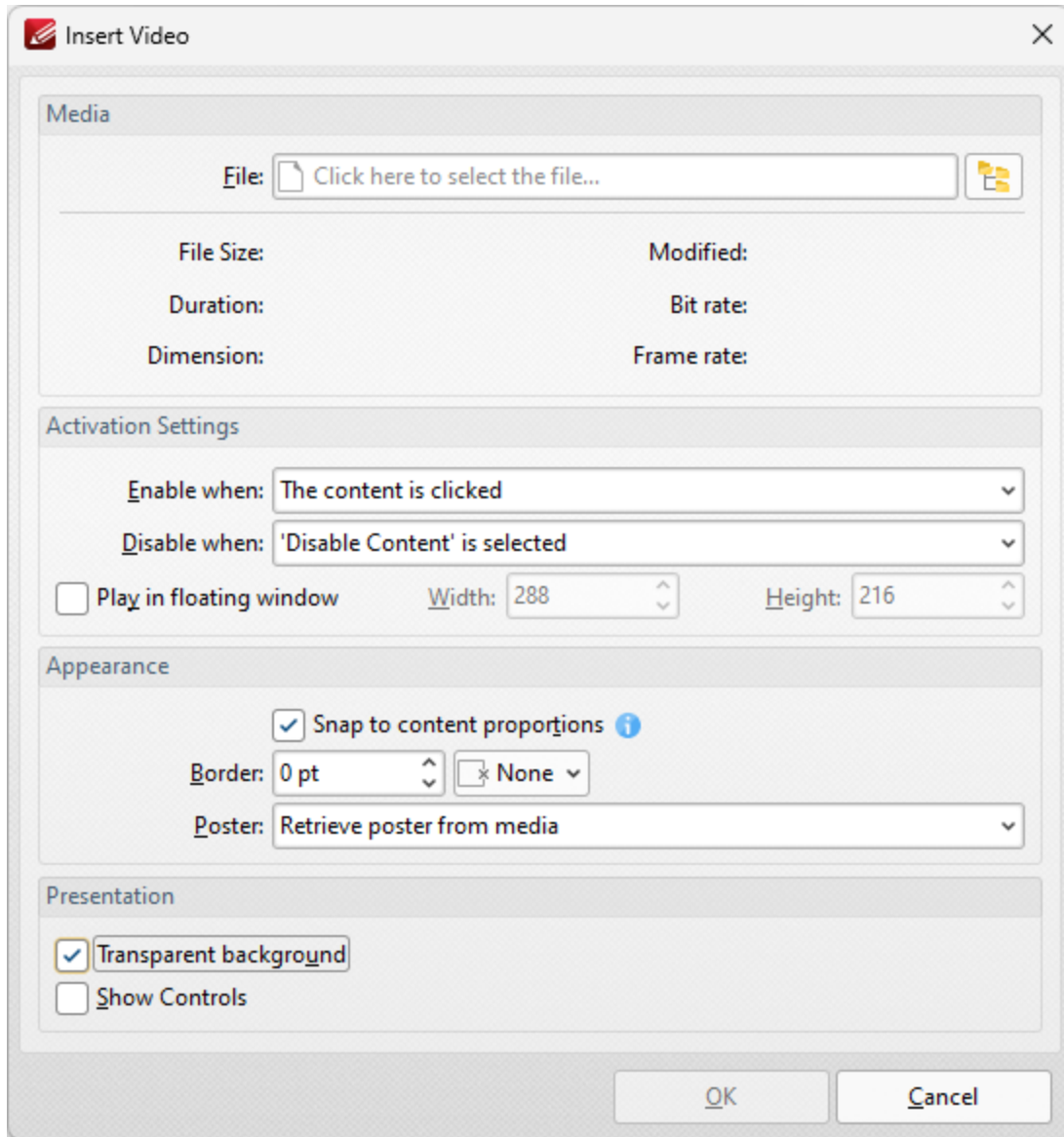
Figure 2. Insert Video Dialog Box

- Click the **File** text box/icon to select the file to be inserted into the document.
- Use the **Enable when** dropdown menu to determine when the video is enabled.
- Use the **Disable when** dropdown menu to determine when the video is disabled.
- Select the **Play in floating window** box to play the video in a floating window when the annotation is selected. Use the **Width** and **Height** boxes to determine the width and height of the floating window.
- Select the **Snap to content proportions** to scale the rectangle in which the video is placed to the same proportions as the video content.
- Use the **Border** dropdown menus to determine the size and color of the border used for the annotation.
- Use the **Poster** dropdown menu to determine the image used as the poster for the annotation.
- Select the **Transparent** background box to give the annotation a transparent background.

- Select the **Show Controls** box to display controls for playing, pausing, stopping and controlling the volume when the video plays.

Click **OK** to add the video annotation.

Rich Media Properties Pane

When video annotations are selected, it is possible to view/edit their properties in the **Rich Media Properties** pane:

Figure 3. Rich Media Properties Pane

- **Media Type** is the media type of the annotation.
- **Printable** is the print status of the annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the annotation belongs. Further information about layers is available **here.** [535]

- **Stroke Color** determines the border color of the annotation.
- **Border Width** determines the border width of the annotation.
- **Enable On** determines when the annotation is enabled.
- **Disable On** determines when the annotation is disabled.

Note that it is necessary to click **Add/Edit Video** in order to edit existing video annotations.

5.7.7.2   Add/Edit Sound Annotations

Add/Edit Sound Annotations

Click **Add/Edit Sound** to add/edit sound annotations:
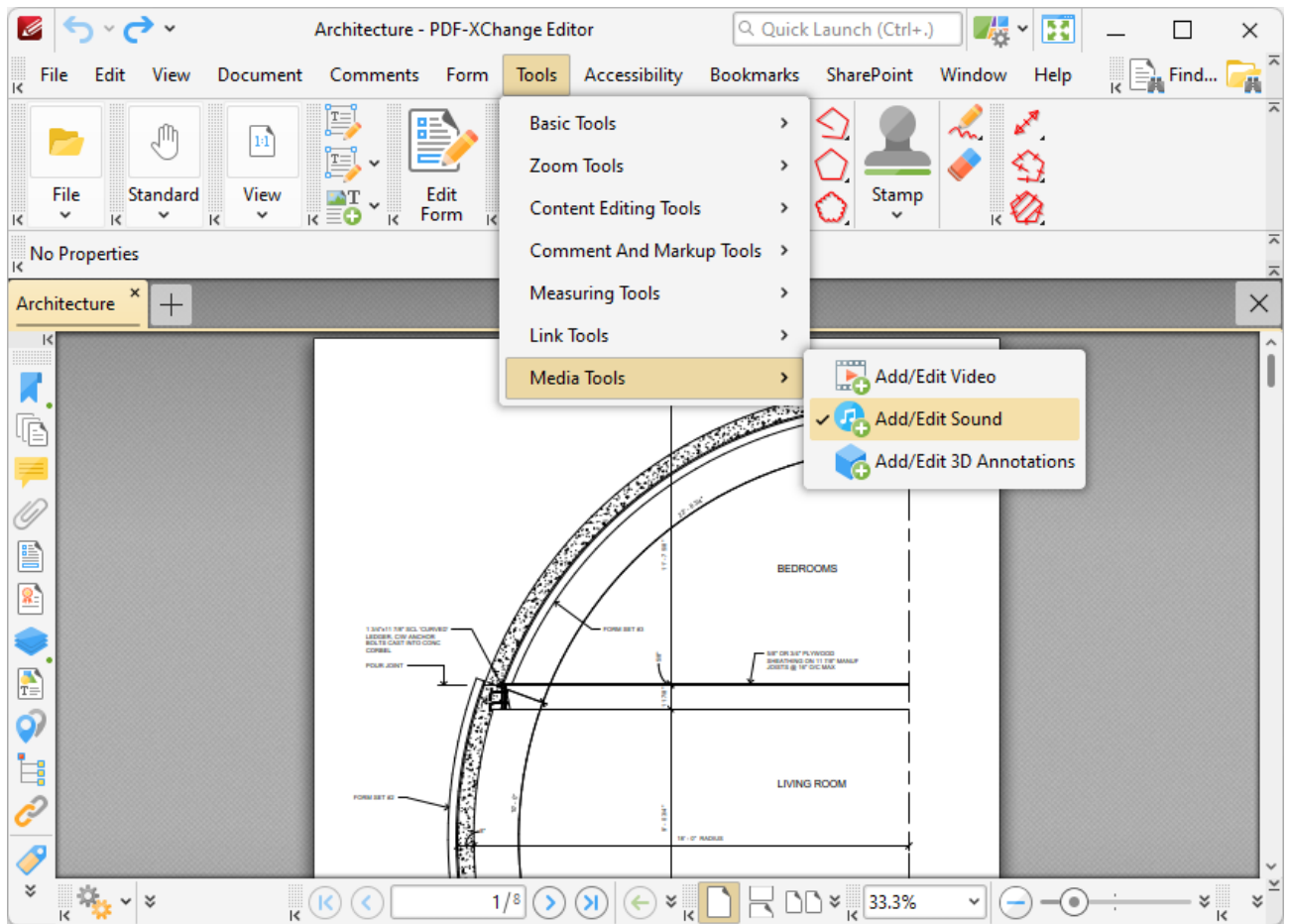
Figure 1. Comment Tab, Add/Edit Sound Highlighted

The pointer will become a crosshairs icon. Click and drag to determine the location at which you want to insert the sound annotation. The **Insert Sound** dialog box will open:
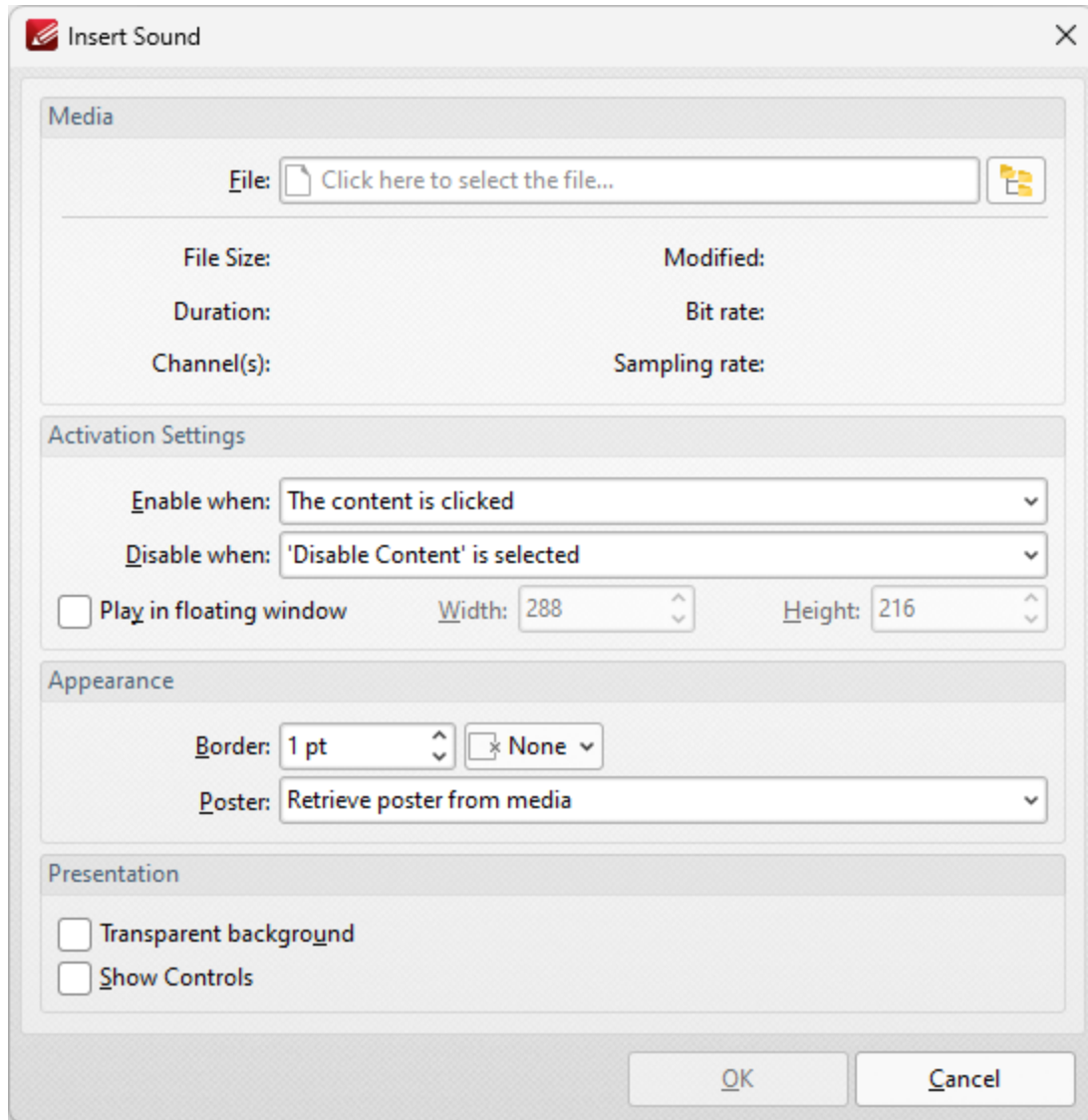
Figure 2. Insert Sound Dialog Box

- Click the **File** text box/icon to select the file to be inserted into the document.
- Use the **Enable when** dropdown menu to determine when the sound is enabled.
- Use the **Disable when** dropdown menu to determine when the sound is disabled.
- Select the **Play in floating window** box to play the sound in a floating window when the annotation is selected. Use the **Width** and **Height** boxes to determine the width and height of the floating window.
- Use the **Border** dropdown menus to determine the size and color of the border used for the annotation.
- Use the **Poster** dropdown menu to determine the image used as the poster for the annotation.
- Select the **Transparent** background box to give the annotation a transparent background.
- Select the **Show Controls** box to display controls for playing, pausing, stopping and controlling the volume when the sound plays.

Click **OK** to add the sound annotation.

Rich Media Properties Pane

When sound annotations are selected, it is possible to view/edit their properties in the **Rich Media Properties** pane:

Figure 3. Rich Media Properties Pane

- **Media Type** is the media type of the annotation.
- **Printable** is the print status of the annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the annotation belongs. Further information about layers is available **here.** 535
- **Stroke Color** determines the border color of the annotation.
- **Border Width** determines the border width of the annotation.
- **Enable On** determines when the annotation is enabled.

- **Disable On** determines when the annotation is disabled.

Note that it is necessary to click **Add/Edit Sound** in order to edit existing sound annotations.

5.7.7.3 Add/Edit 3D Annotations

Add/Edit 3D Annotations

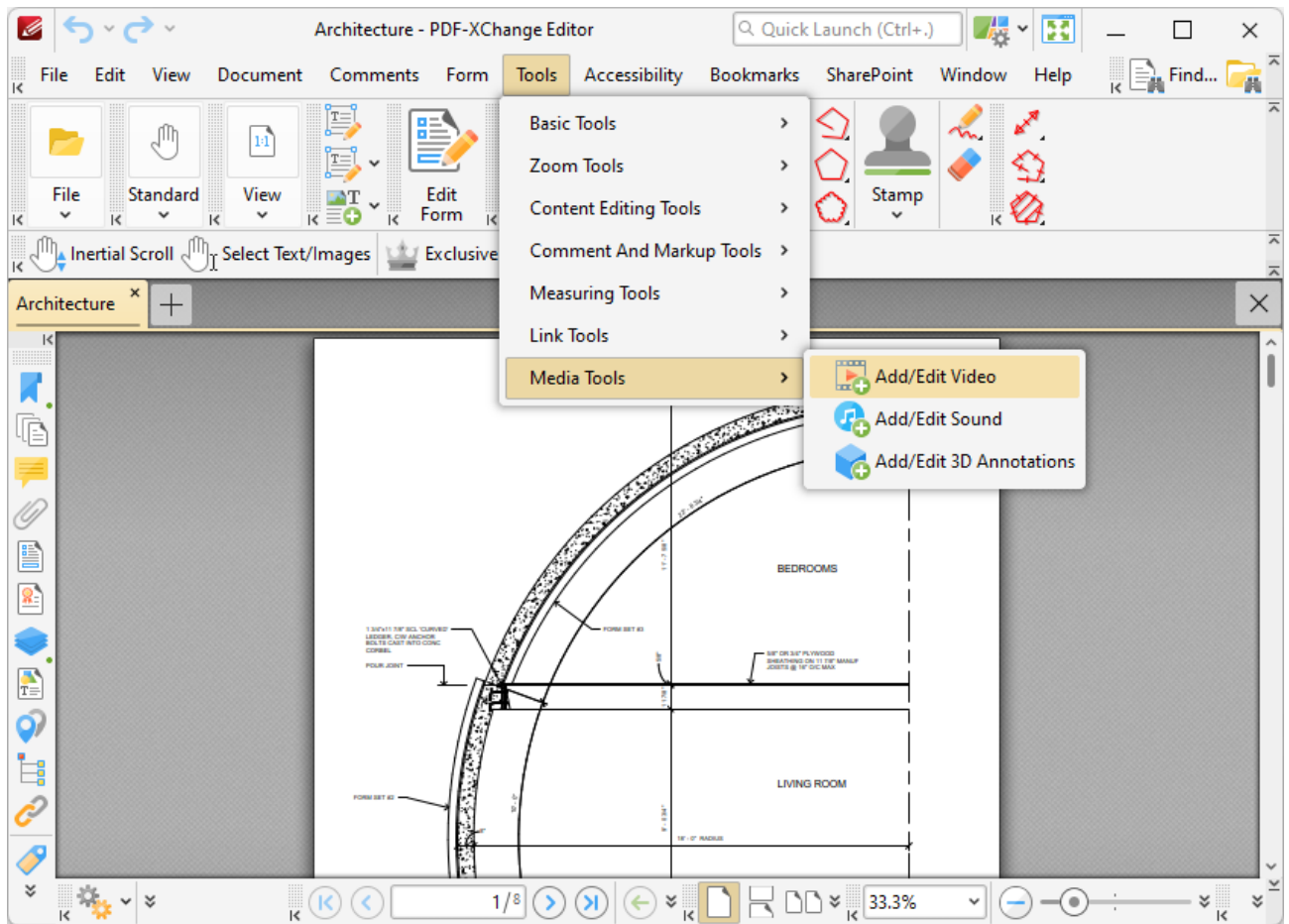Click **Add/Edit 3D Annotations** to add/edit 3D annotations:
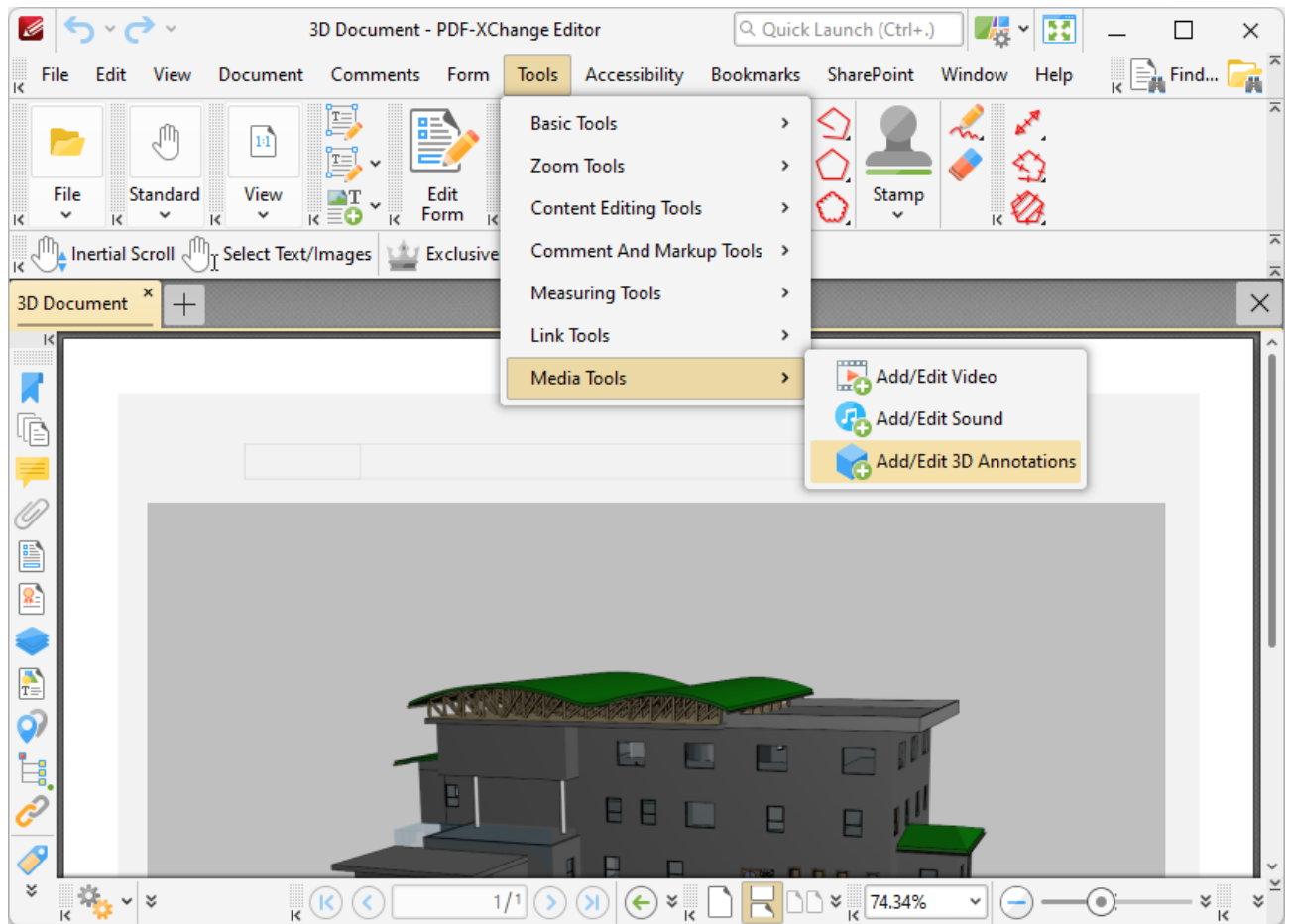
Figure 1. Comment Tab, Add/Edit 3D Annotation Highlighted

The pointer will become a crosshairs icon. Click and drag to determine the location at which you want to insert the 3D annotation. The **Add 3D Annotation** dialog box will open:
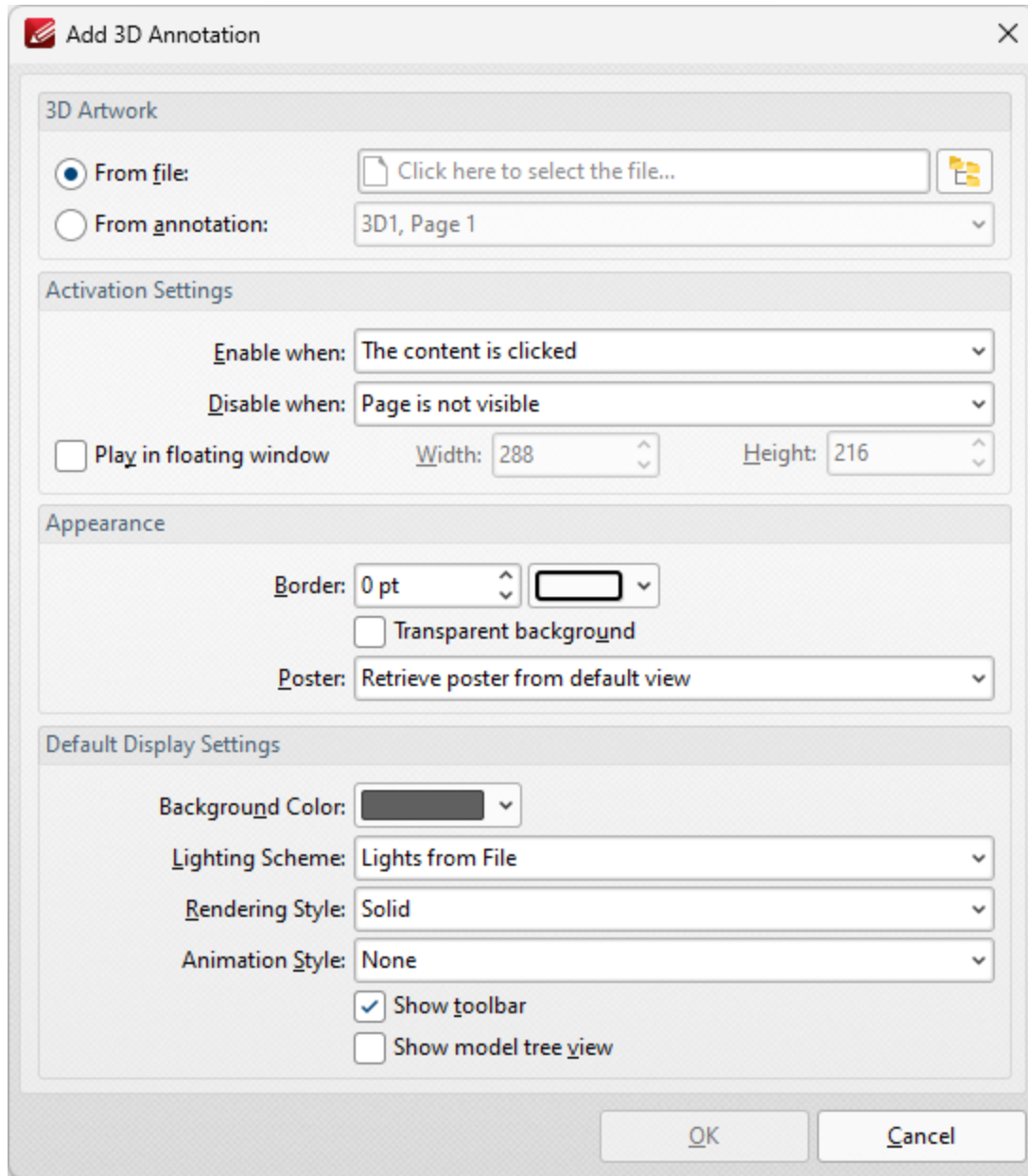
Figure 2. Add 3D Annotation Dialog Box

- Select the **From file** button to add a 3D annotation from file, then enter the name and path of the file or click the icon to select it using the **Windows** file explorer.
- Select the **From annotation** button to add a 3D annotation from an existing 3D annotation in the current document, then select the desired annotation in the dropdown menu.
- Use the **Enable when** dropdown menu to determine when the 3D annotation is enabled.
- Use the **Disable when** dropdown menu to determine when the 3D annotation is disabled.
- Select the **Play in floating window** box to display the 3D annotation in a floating window when it is enabled. Use the **Width** and **Height** number boxes to determine the dimensions of the floating window.

- Use the **Border** number box and adjacent dropdown menu to determine the size and color of the border around the 3D annotation.
- Use the **Poster** dropdown menu to determine the image that displays over the 3D annotation before it is enabled:
  - Select **Retrieve poster from default view** to use the default view of the 3D annotation as the poster.
  - Select **Create poster from file** to use a file on your computer, then select the file in the **Open Files** dialog box.
- Use the **Background Color** dropdown menu to determine the background color of the 3D annotation. This color will also be used as the color of the annotation before it is enabled when the **Retrieve poster from default view** option detailed above is used.
- Use the **Lighting Scheme** dropdown menu to determine the lighting scheme of the 3D annotation.
- Use the **Rendering Style** dropdown menu to determine the rendering style of the 3D annotation.
- Use the **Animation Style** dropdown menu to determine the animation style of the 3D annotation.
- Select the **Show toolbar** and/or **Show model tree view** boxes to enable/disable these options as desired.

Click **OK** to add the 3D annotation.

3D Properties Pane

When 3D annotations are selected, it is possible to view/edit their properties in the **3D Properties** pane:

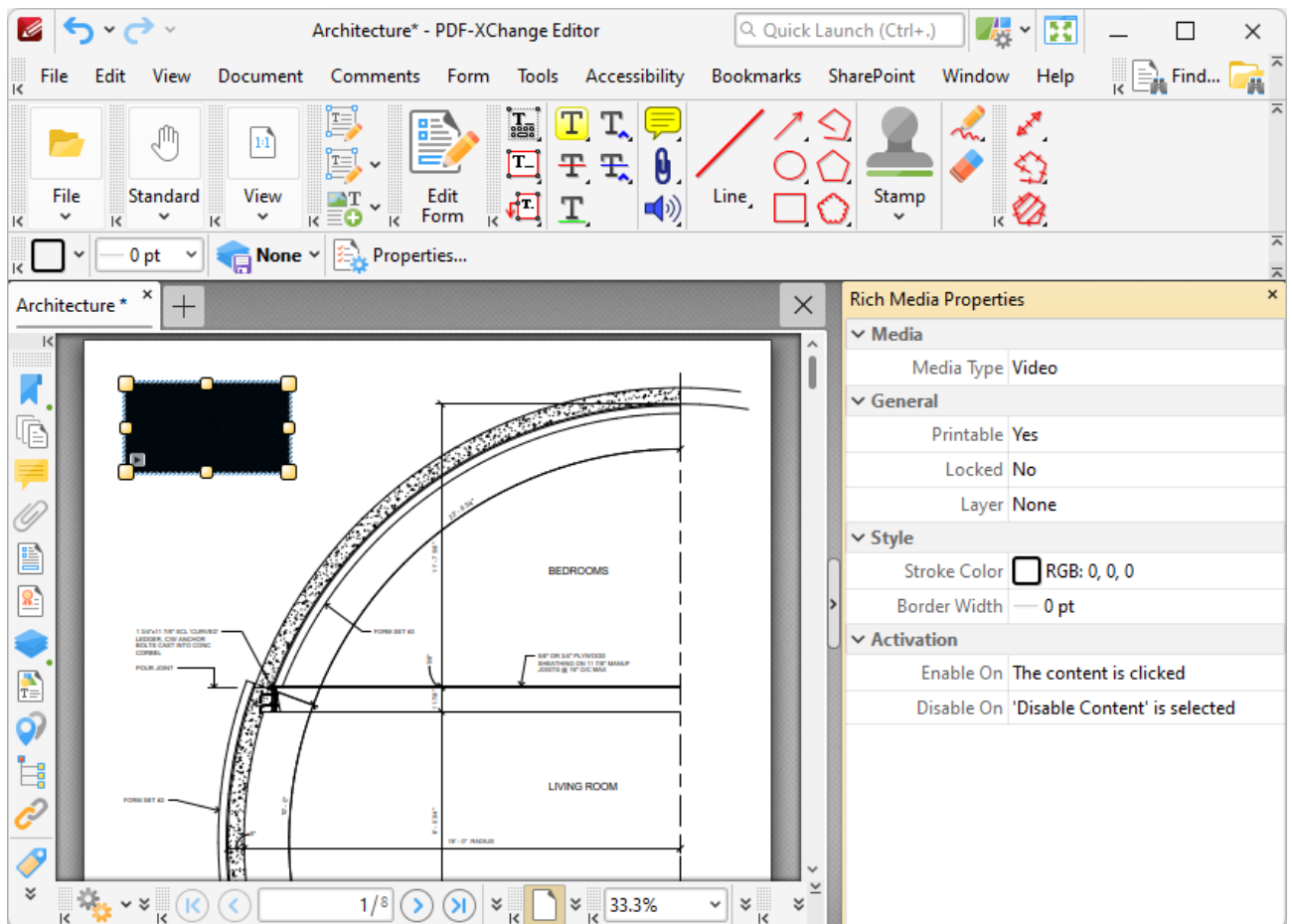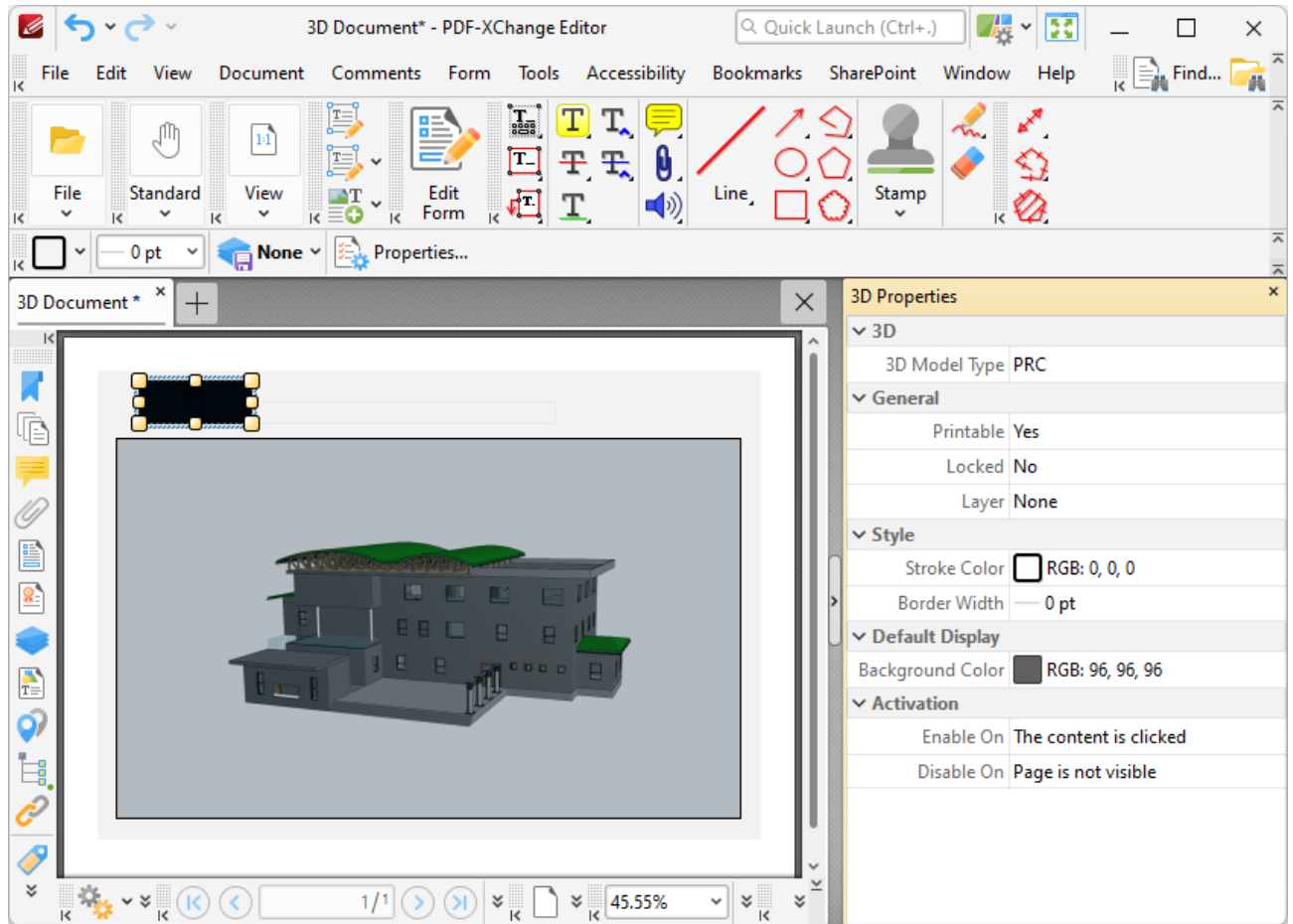**Figure 3.** 3D Properties Pane

- **3D Model Type** is the model type of the 3D annotation.
- **Printable** is the print status of the 3D annotation. If this property is enabled then the annotation is printed with the document. If this property is not enabled then the annotation is not printed.
- **Locked** is the locked status of the 3D annotation. If this property is enabled then the annotation cannot be deleted and its properties (including its position and size) cannot be modified by users.
- **Layer** specifies the optional content layer to which the 3D annotation belongs. Further information about layers is available **here.** 535
- **Stroke Color** determines the border color of the 3D annotation.
- **Border Width** determines the border width of the 3D annotation.
- **Background Color** determines the background color of the 3D annotation.
- **Enable On** determines when the 3D annotation is enabled.
- **Disable On** determines when the 3D annotation is disabled.

Note that it is necessary to click **Add/Edit 3D Annotations** in order to edit existing 3D annotations.

5.8 Accessibility

 Accessibility

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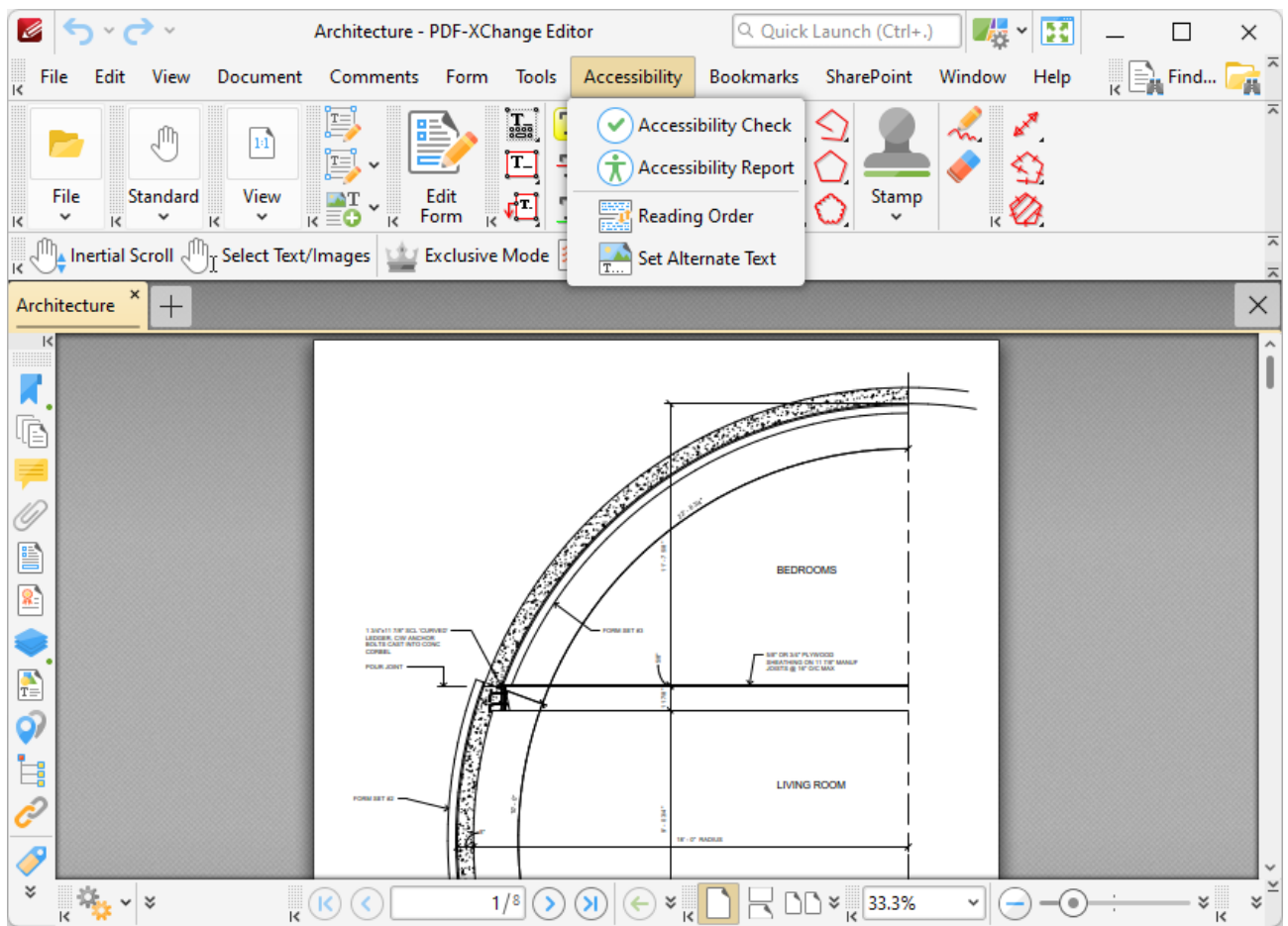
Figure 1. Accessibility Tab Submenu

The options in the **Accessibility** tab are used to view/edit document accessibility and utilize accessibility features. These features are intended to make documents accessible to visually impaired or otherwise disabled users. Documents must therefore meet a range of requirements and pass thirty-

two accessibility rules in order to be defined as 'accessible.' These requirements include:

- **Searchable text** that ensures screen readers and other similar software can read and/or extract the document text, as well as ensuring that users can select, edit and manipulate the text. If documents contain scanned images of text that cannot be searched of selected, then those documents will not meet accessibility requirements and may fail an accessibility check. It will be necessary for **OCR** 725 to be performed on those documents in order to make the scanned text searchable and selectable.
- **Fonts that enable accurate character extraction** in order to enable use of both the **Read Out Loud** 1275 feature and some screen readers, as well as saving text for braille embossers.
- **Labeled form fields that have accessible error messages and no timing.** These requirements are intended for PDF documents that contain forms that users will fill out with information. Form fields must be interactive in order to be accessible, and users must be able to enter information into the forms. Forms must also provide identification, provide tips on how they should be completed and prevent errors from being made. Form completion should not be timed unless the user can request additional time.
- **Document language and Title indication** in order to enable screen readers to use the correct speech synthesizer and language, and enable users to locate and identify the document.
- **Security that does not interfere with assistive technology.** The text of accessible PDFs must be available to screen readers. Some PDF document authors restrict users from printing, copying, extracting, editing or adding comments to the document. The security settings of documents must not interfere with the ability of screen readers to convert the text to speech or braille in order for the document to meet accessibility requirements.
- **Document structure and reading order tags** that enable screen readers and other text-to-speech tools to present document content to users in a logical order.
- **Alternate text descriptions for non-text elements** that enables screen readers to provide an explanation for document content that is not text-based.

These options in the **Accessibility** tab are used to perform and view the results of accessibility checks on documents, as well as determine the reading order and alternate text of documents:

- Click **Accessibility Check** to perform an accessibility check on the current document, as detailed below.
- Click **Accessibility Report** 582 to view the accessibility report once an accessibility check has been performed.
- Click **Reading Order** 574 to determine the reading order of documents.
- Click **Set Alternate Text** to determine alternate text for document content such as images, as detailed below.

Perform an Accessibility Check

Click **Accessibility Check** to perform an accessibility check on the current document:

Figure 3. Accessibility Tab, Accessibility Check Highlighted

The **Accessibility Checker Options** dialog box will open:
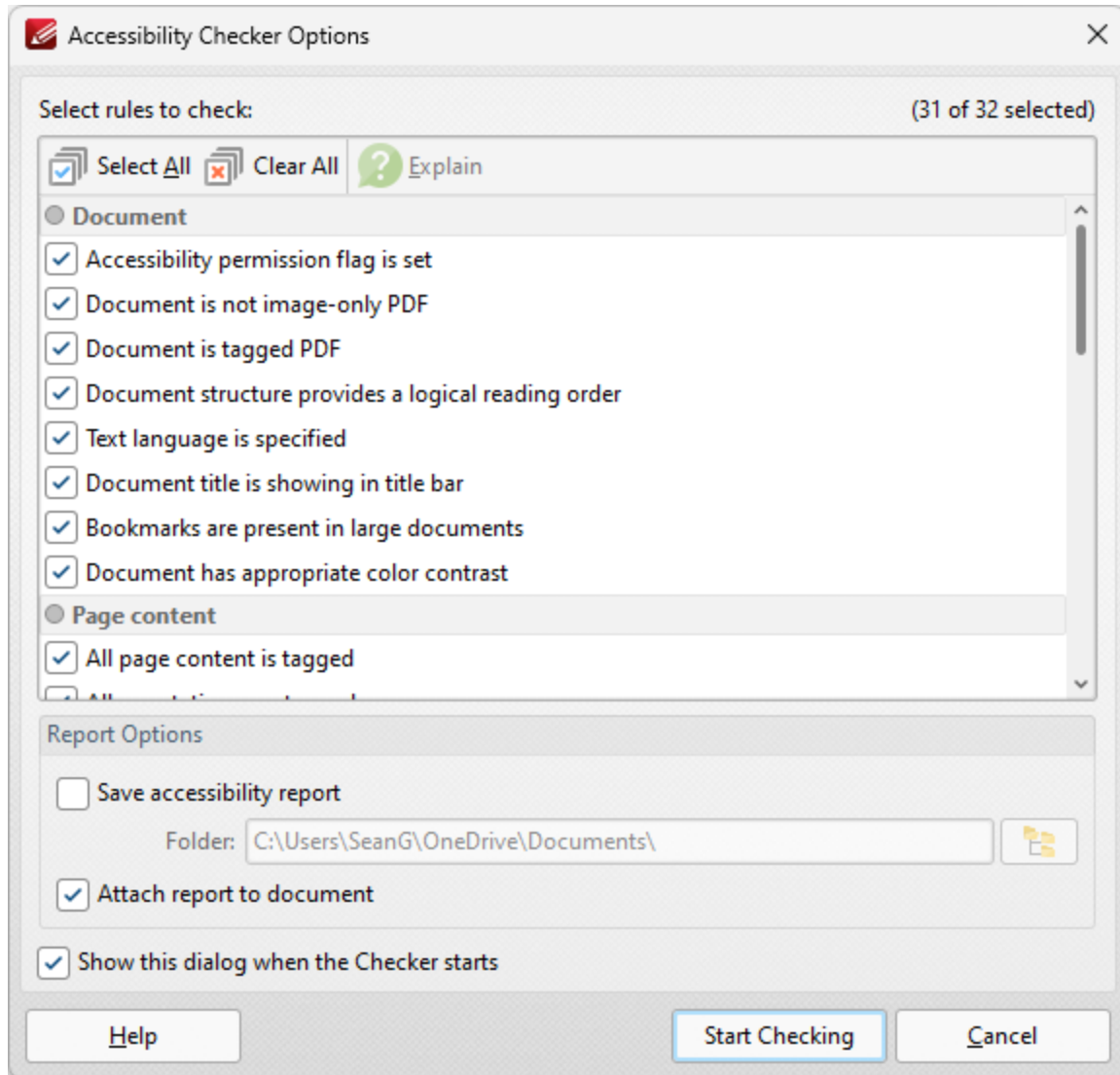
Figure 4. Accessibility Checker Options Dialog Box

- The thirty-two accessibility checks/rules are detailed in the pane. The definitions for these rules are available **here.** [1102]
- Select the boxes of the checks that you want to perform on the document.
- Select the **Save accessibility report** box to save a copy of the report to file, then specify the folder in which you want to save the report.
- Select the **Attach report to document** box to attach a copy of the report to the current document.
- Select the **Show this dialog box when the Checker starts** box to keep the **Accessibility Checker Options** dialog box open when the check runs.
- Click **Start Checking** to start the accessibility check. The check will then run and the results will be displayed in the **Accessibility Checker** [579] pane.

Set Alternate Text

Click **Set Alternate Text** in the **Accessibility** tab to add alternate text to items that have been tagged in the document as figures. The **Fix Figures Alternate Text** dialog box will open:
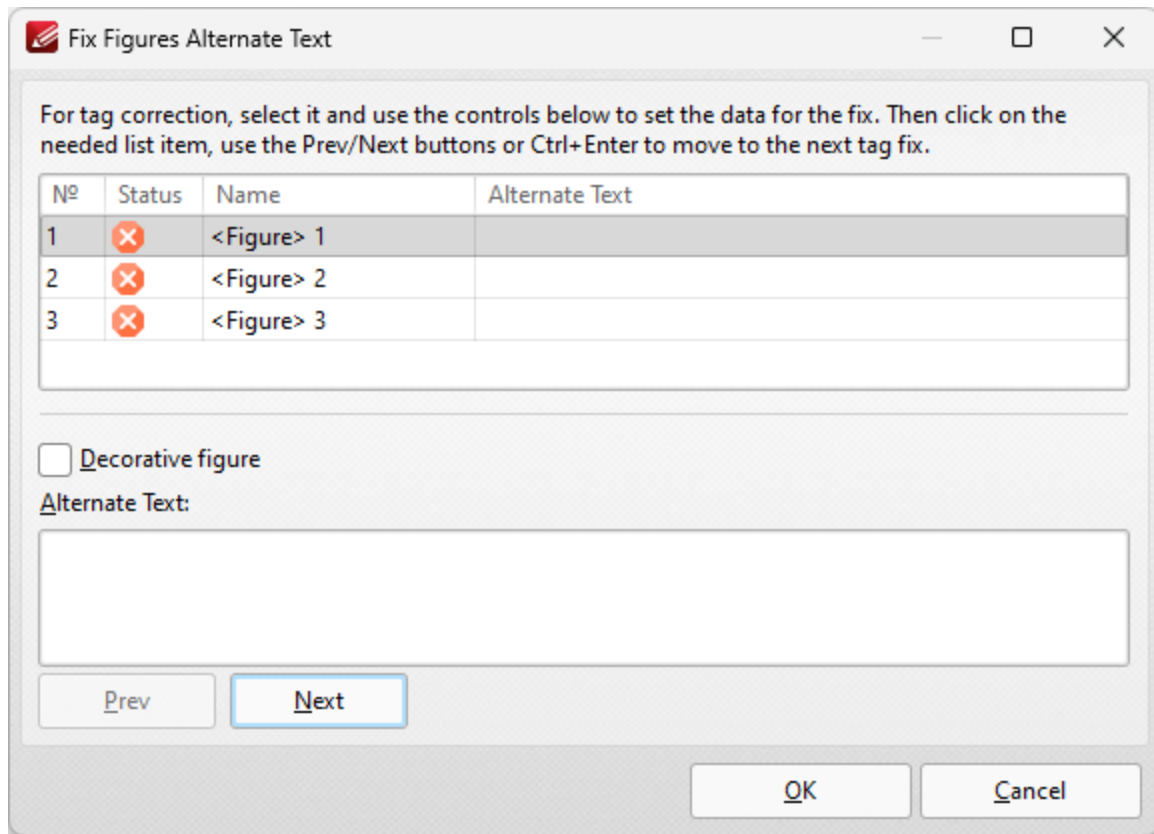
Figure 5. Fix Figures Alternate Text Dialog Box

- Click to select figures and then enter the desired alternate text in the **Alternate Text** pane.
- Select the **Decorative figure** box to specify that the figure is a decorative image for which alternate text is not required.
- Click **Prev** or **Next** to move to the previous/next figure.

Click **OK** to save changes.

5.9   Bookmarks

 Bookmarks

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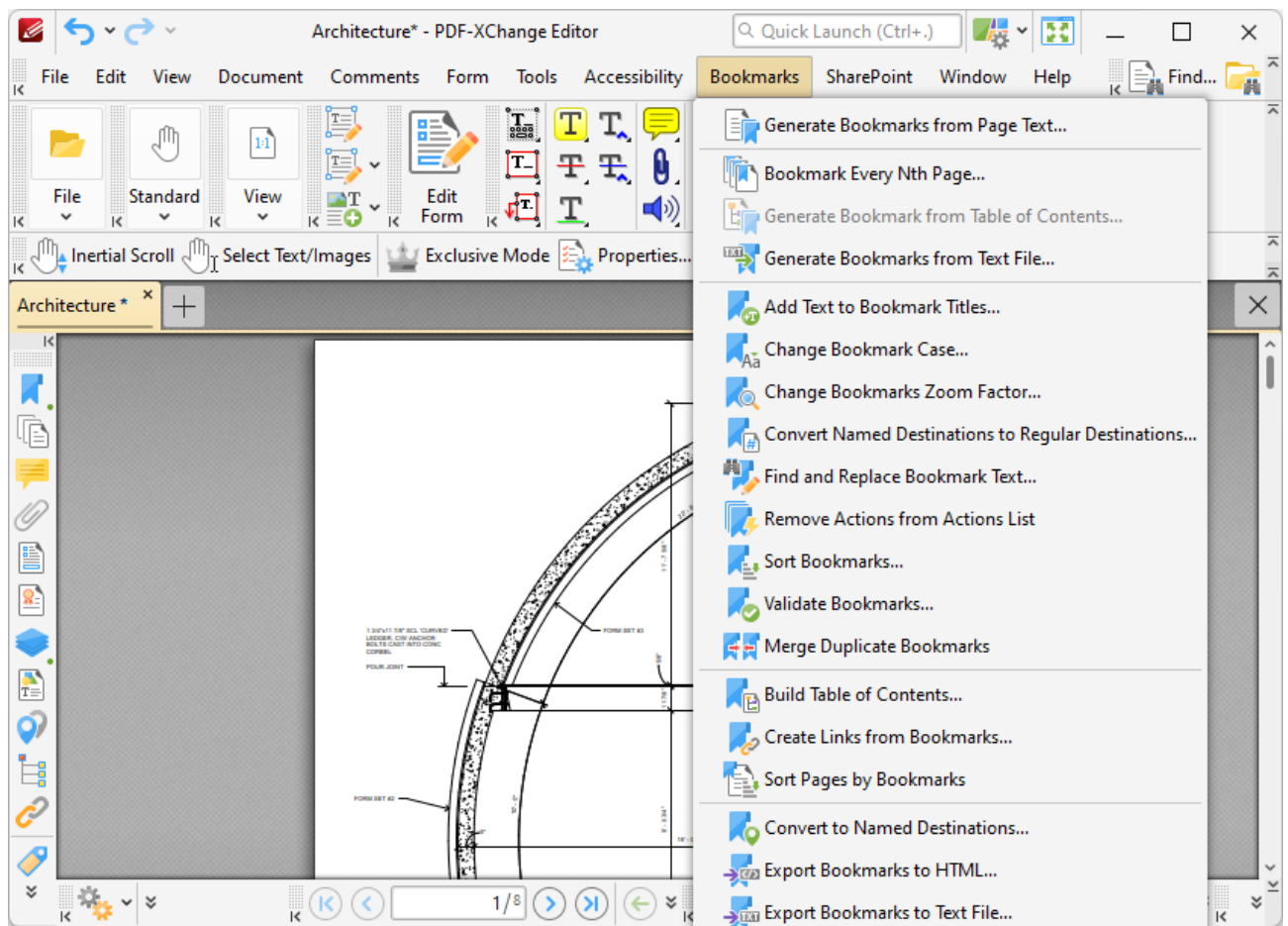
Figure 1. Bookmarks Tab Submenu

The options in this submenu relate to bookmarks and bookmark functionality:

- **Generate Bookmarks from Page Text** [1044]
- **Bookmark Every Nth Page** [1052]

- **Generate Bookmarks from Table of Contents** ⌐1054¬
- **Generate Bookmarks from Text File** ⌐1056¬
- **Add Text to Bookmark Titles** ⌐1059¬
- **Change Bookmark Case** ⌐1061¬
- **Change Bookmarks Zoom Factor** ⌐1063¬
- **Convert Named Destinations to Regular Destinations** ⌐1065¬
- **Find and Replace Bookmark Text** ⌐1067¬
- **Remove Actions from Actions List** ⌐1069¬
- **Sort Bookmarks** ⌐1072¬
- **Validate Bookmarks** ⌐1074¬
- **Merge Duplicate Bookmarks** ⌐1076¬
- **Build Table of Contents** ⌐1078¬
- **Create Links from Bookmarks** ⌐1082¬
- **Sort Pages by Bookmarks** ⌐1084¬
- **Convert to Named Destinations** ⌐1085¬
- **Export Bookmarks to HTML** ⌐1087¬
- **Export Bookmarks to Text File** ⌐1088¬

Note that several of the keyboard shortcuts relate to bookmarks. See **here** ⌐1141¬ for a comprehensive list of available keyboard shortcuts.

5.9.1 **Generate Bookmarks from Page Text**

Generate Bookmarks from Page Text

Click **Generate Bookmarks from Page Text** to create bookmark generators that create bookmarks from document text:
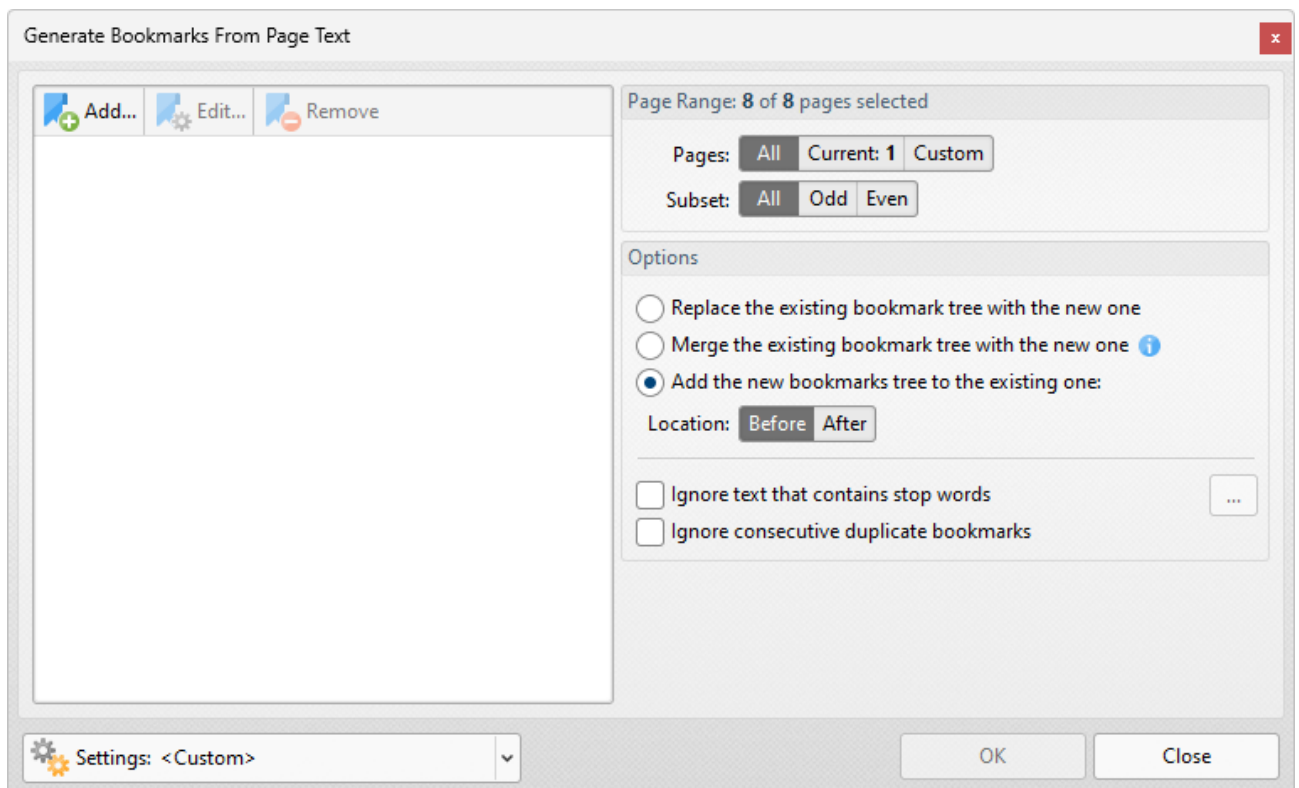
Figure 1. Generate Bookmarks From Page Text Dialog Box

- Click **Add** to add a new bookmark generator. The dialog box displayed in *(figure 4)* will open.
- Click **Edit** to edit the selected bookmark generator.
- Click **Remove** to remove the selected bookmark generator.
- The **Page Range** options determine the pages included in the generation of bookmarks:
  - Select **All** to use all document pages.
  - Select **Selected Pages** to use the pages currently selected in the **Thumbnails**[510] pane.
  - Select **Current Page** to use only the current page.

- Use the **Pages** box to determine specific pages/page ranges. Further information on the specification of page ranges is available **here.** ¹²⁷⁴
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only** for specified page ranges.
- Select the **Ignore text that contains stop words** box as desired. Text containing stop words will be excluded from the bookmark generation process when this option is enabled. 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.
- Click the **Settings** dropdown arrow to save/manage/delete bookmark generator settings:
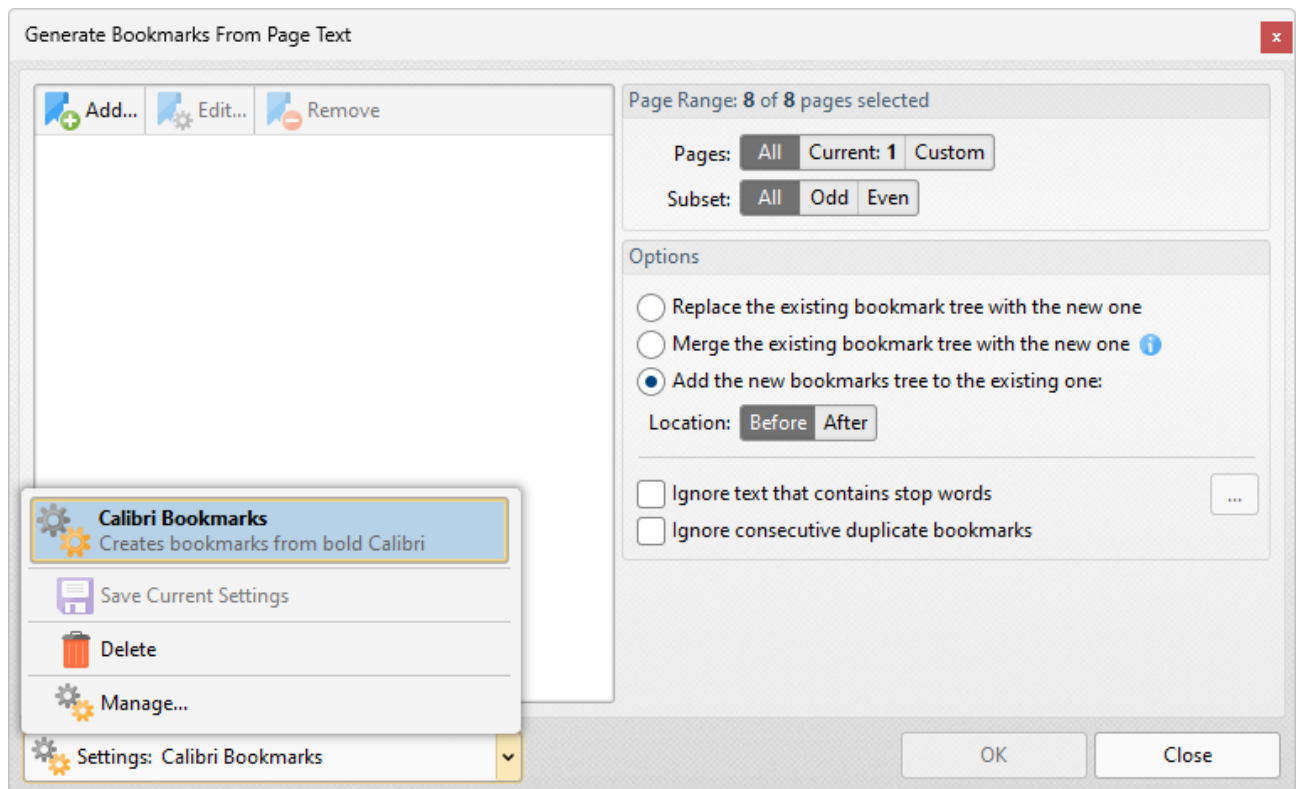
Figure 2. Generate Bookmarks from Page Text Dialog Box, Save/Manage/Delete Options

- Click **Save Current Settings** to save the current settings as a profile for subsequent use.
- Click **Delete** to delete the current profile.
- Click **Manage** to manage saved profiles. The **Manage Presets** dialog box will open:
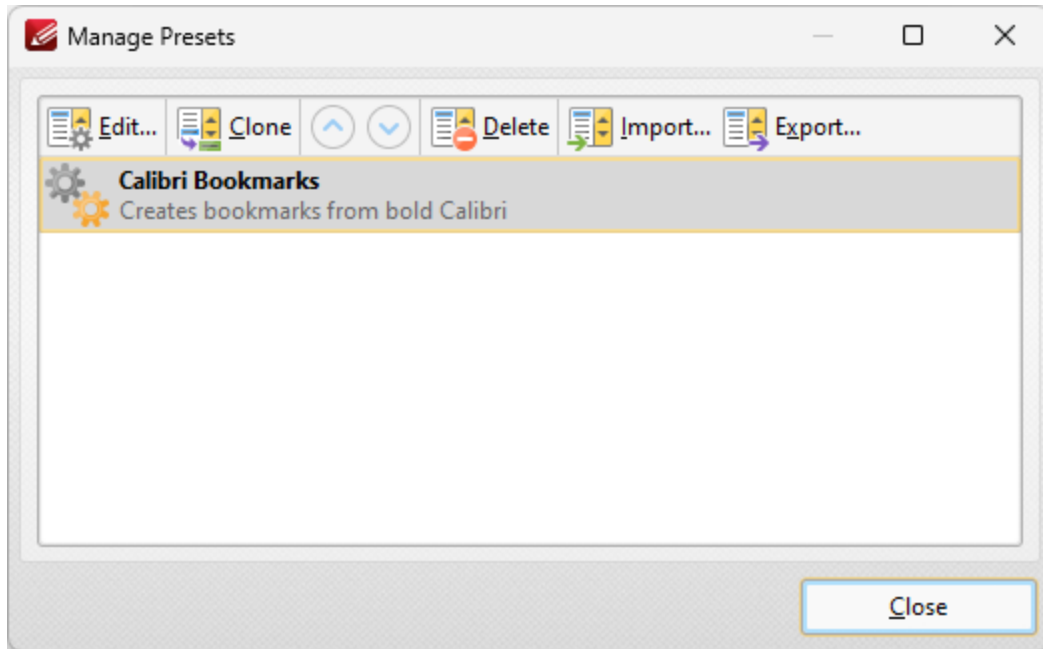
Figure 3. Manage Presets Dialog Box

- Click **Edit** to edit selected profiles.
- Click **Clone** to clone selected profiles.
- Use the up and down arrows to move selected profiles up or down in the list.
- Click **Delete** to delete selected profiles.
- Click **Import** to import profiles from a saved file.
- Click **Export** to export profiles to file.
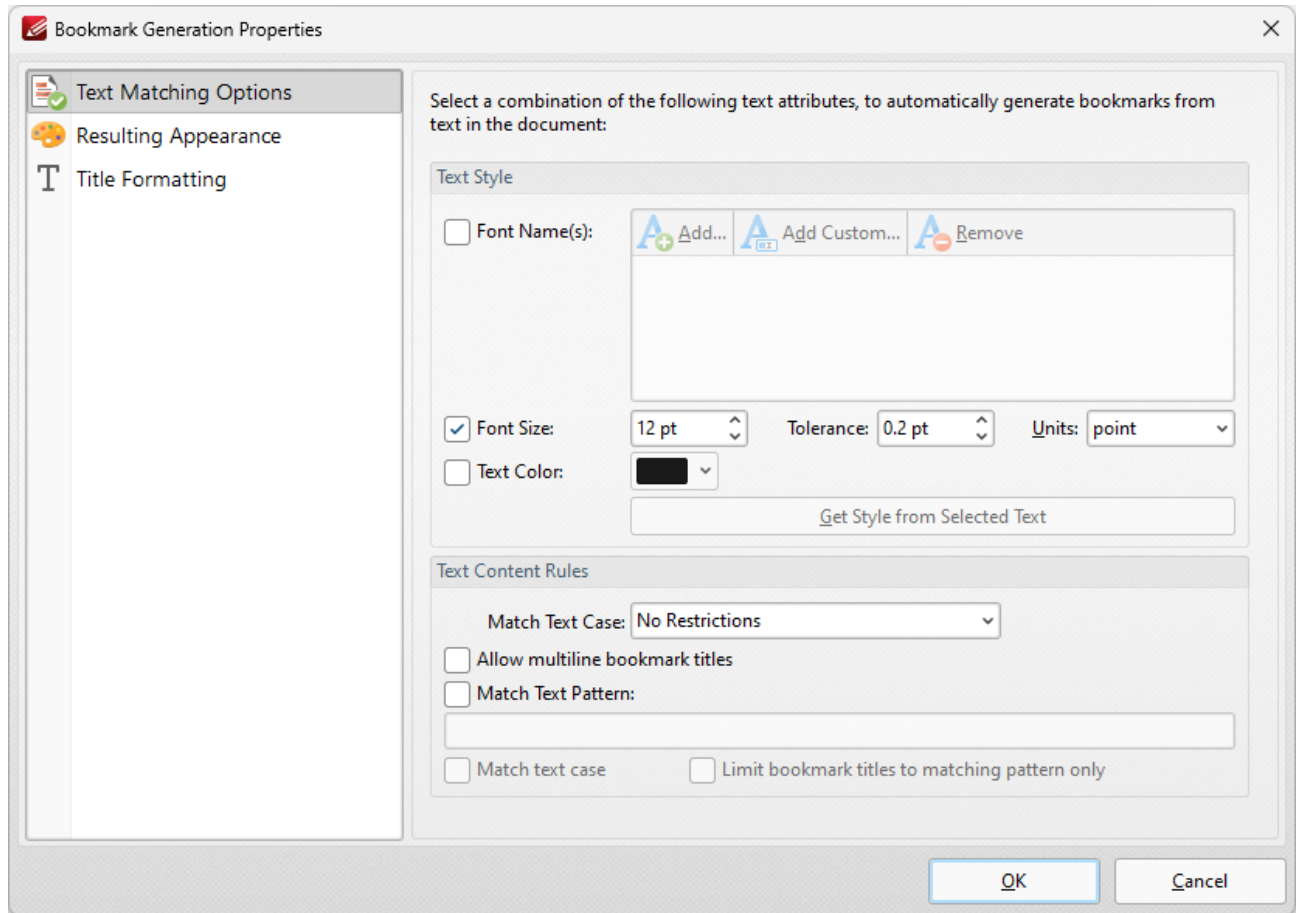
Figure 4. Bookmark Generation Properties Dialog Box, Text Matching Options

The options selected in the **Bookmark Generation Properties** dialog box determine the text used to generate bookmarks, and the style of the generated bookmarks:

Text Matching Options

These options determine text used in the generation of bookmarks according to font, size and color:

- Select the **Font Names** box to include text of specific fonts in the generation of bookmarks. Click **Add** to add fonts to the list, **Add Custom** to add custom fonts, or **Remove** to remove selected fonts.
- Select the **Font Size** box to include text of a specific size in the generation of bookmarks. Use the number boxes to determine the **Size, Tolerance** and **Units** of text included in the generation of bookmarks. The **Tolerance** value determines the degree to which selected text can differ from the specified **Font Size** and remain included in the generation of bookmarks.
- Select the **Text Color** box to include text of of a specific color in the generation of bookmarks, then select a color in the dropdown menu.

- Click **Get Style from Selected Text** to determine the font settings detailed above according to text currently selected in the active document. Use the **Select Text Tool** 811 to select text for this purpose.
- The option selected in the **Match Text Case** dropdown menu determines text used in the generation of bookmarks according to text case:
  - Select **No Restrictions** to include text of all cases in the generation of bookmarks.
  - Select **All Characters Are Capital** to include only upper-case text in the generation of bookmarks.
  - Select **First Character is Capital** to include only text that starts with a capital letter in the generation of bookmarks.
  - Select **First Character is Digit** to include only text that starts with a digit in the generation of bookmarks.
- Select the **Allow multiline bookmark titles** box to allow bookmark titles to exceed one line in length. This is useful in cases where it is not possible to shorten bookmark titles.
- Select the **Match Text Pattern** box to specify a sequence of words that document text must match in order to be included in the generation of bookmarks. Enter the desired text patten in the text box. Note that it is possible to use **ECMAScript** regular expressions for this feature.
- Select the **Match text case** box to include only text that matches the case of the text entered in the **Match Text Pattern** box. If this box is not selected then all matching text will be included regardless of its case.
- Select the **Limit bookmark titles to matching pattern only** box to determine that only text matching the specified pattern will be included in the generation of bookmarks.

Resulting Appearance

These options determine characteristics of generated bookmarks:
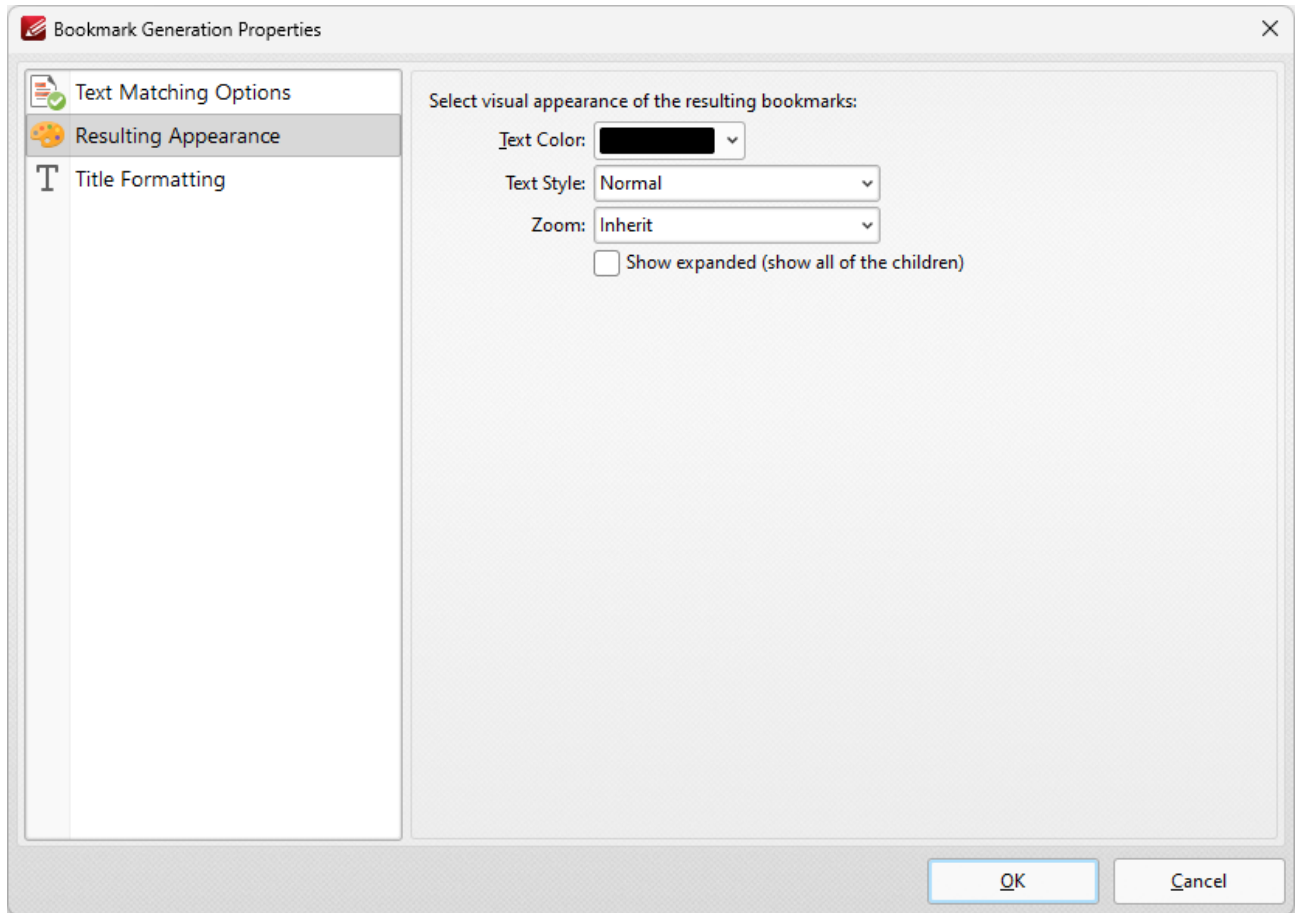
Figure 5. Bookmark Generation Properties Dialog Box, Resulting Appearance

- Use the **Text Color** menu to determine the text color of bookmarks.
- Use the **Text Style** menu to determine the text style of bookmarks.
- Use the **Zoom** menu to determine the zoom level when bookmarks are clicked. Select **Inherit** to use the current zoom level.
- Select the **Show expanded** box to expand all generated bookmarks.

Title Formatting

These options are used to format bookmark titles:
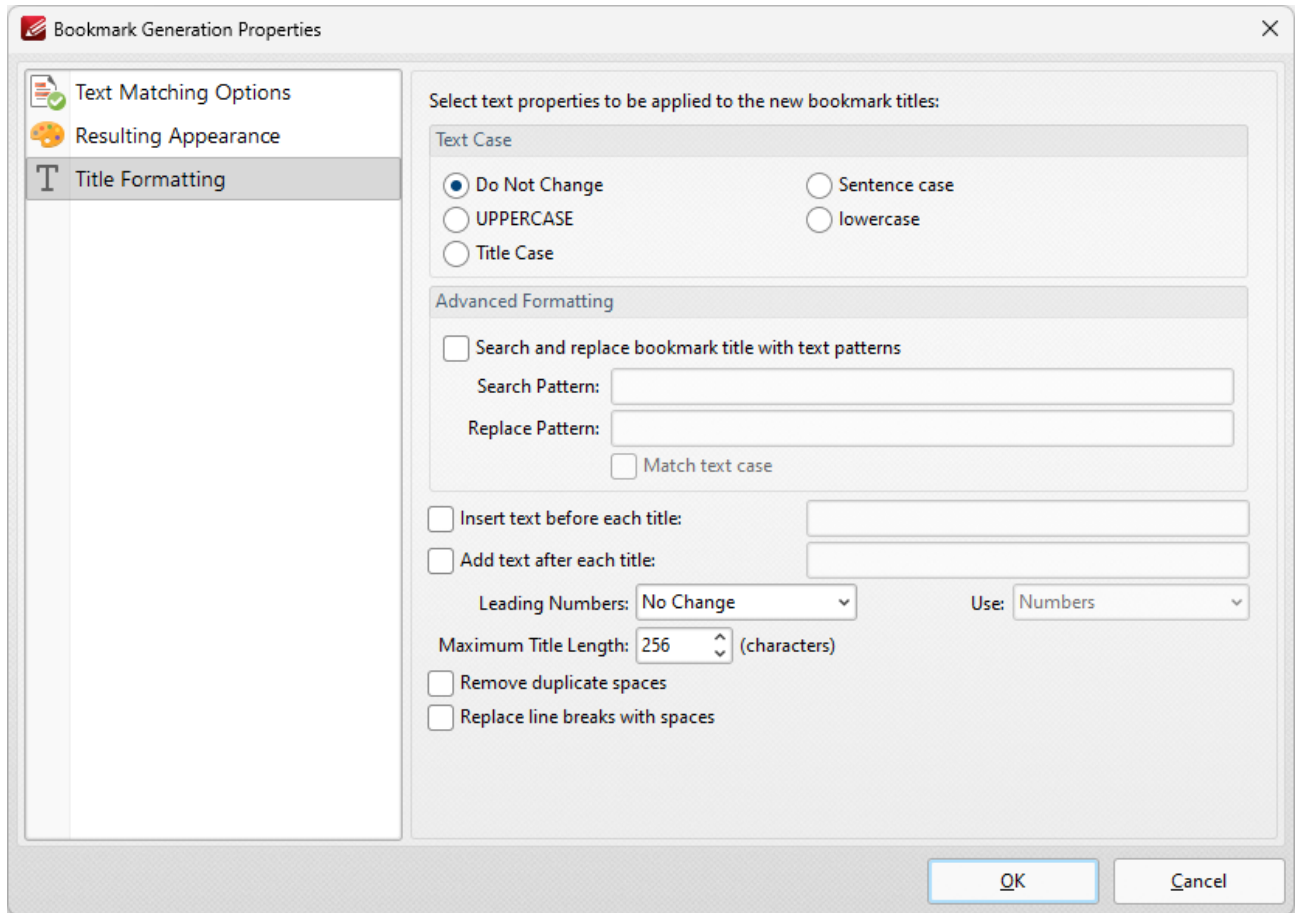
Figure 6. Bookmark Generation Properties Dialog Box, Title Formatting

- Select a **Text Case** option to determine the text case of generated bookmark titles.
- Select the **Search and replace bookmark title with text patterns** box to search for specific text in bookmark titles and replace it with customized text:
    - Enter the text to be replaced in the **Search Pattern** text box.
    - Enter the replacement text in the **Replace Pattern** text box.
    - Select the **Match text case** box as desired.
- Select the **Insert text before each title** box to add text before bookmark titles. Enter the desired text in the text box.
- Select the **Add text after each title** box to add text after bookmark titles. Enter the desired text in the text box.
- The **Leading Numbers** dropdown menu is used to add/remove/retain leading numbers for bookmarks. Select **No Change, Add** or **Remove** as desired. If leading numbers are being added then use the **Use** dropdown menu to select **Numbers, Letters** or **Roman Numerals.**
- Use the **Maximum Title Length** text box to set the maximum number of characters for generated bookmarks.
- Select the **Remove duplicate spaces** box to remove instances of adjacent blank characters.
- Select the **Replace line breaks with spaces** box to use spaces instead of line breaks for bookmarks.

Click **OK** to generate bookmarks.

5.9.2 **Bookmark Every Nth Page**

Bookmark Every Nth Page

Click **Bookmark Every Nth Page** to create bookmarks from pages at intervals of a user-defined value:
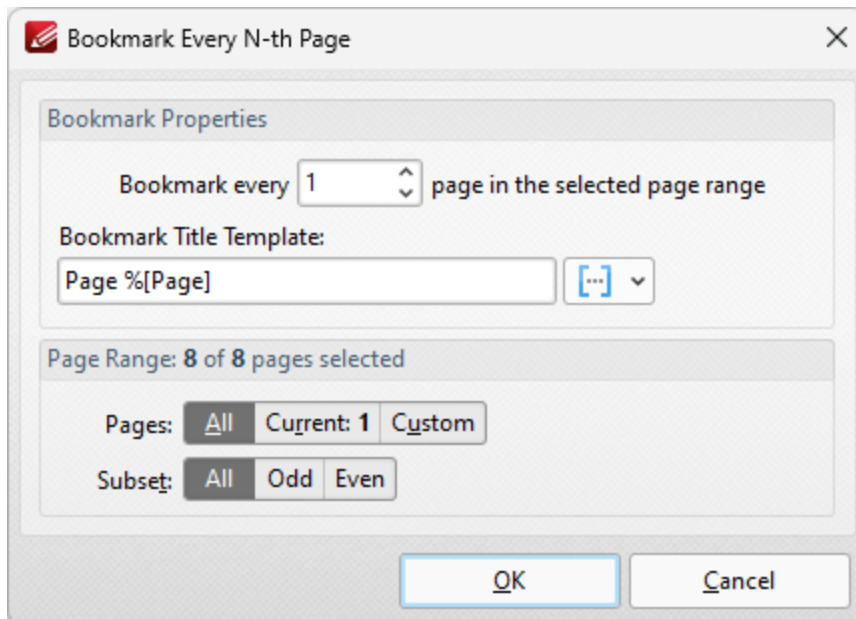
Figure 1. Bookmark Every N-th Page Dialog Box

- Enter a figure in the number box to determine the interval at which bookmarks are created. For example, if 2 is entered then a bookmark will be created from every second document page.
- Enter a value for the **Bookmark title template** as desired. This value determines the template for bookmark titles. Click the blue icon to add **macros.** [1157] The default value is '**Page %[Page]',** which will result in the bookmark titles **'Page 1', 'Page 2', 'Page 3'** etc.
- The page range options for bookmark generation are as follows:
  - Select **All** to include all pages.
  - Select **Selected Pages** to include only the pages selected in the **Thumbnails** [510] pane.
  - Select **Current Page** to include only the current page.
  - Use the **Pages** box to specify a custom range. Instructions on the specification of page ranges are available **here.** [1274]

Click **OK** to create bookmarks.

5.9.3   **Generate Bookmarks from Table of Contents**

Generate Bookmarks from Table of Contents

Click **Generate Bookmarks from Table of Contents** to create bookmarks from an existing table of contents. Please note that the table of contents must first be selected using the **Select Text Tool** 811 for this feature to be available. When it is selected, the following dialog box will open:
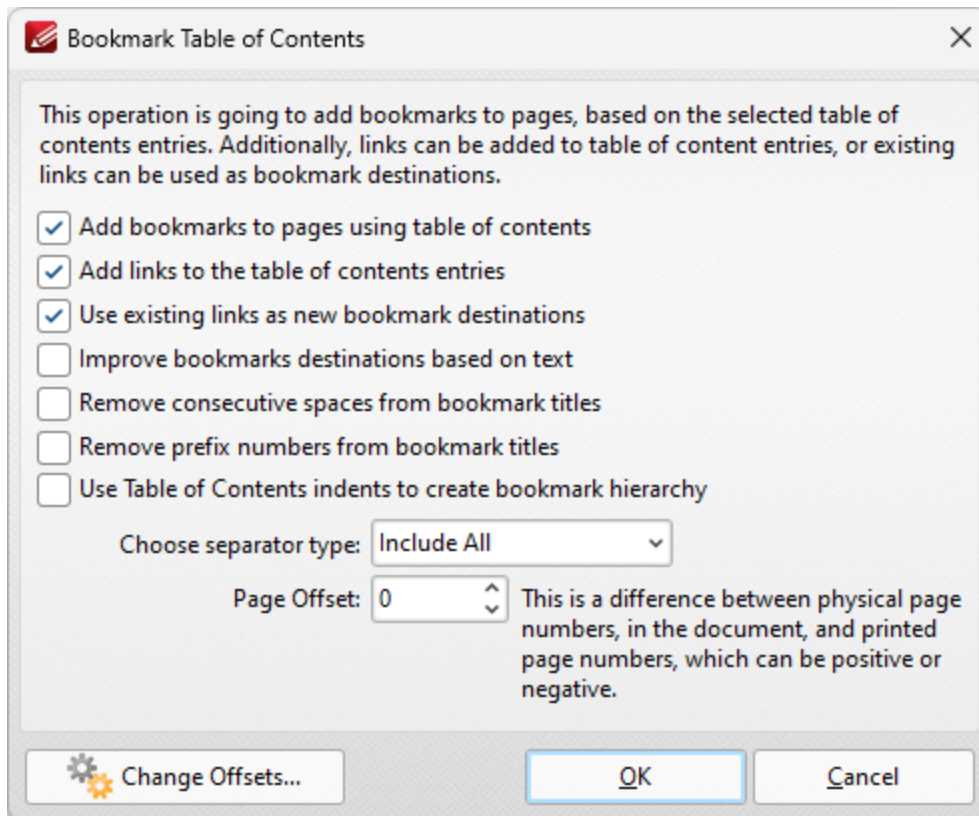
Figure 1. Bookmark Table of Contents Dialog Box

- Select check boxes to enable/disable parameters.
- Use the **Choose separator type** dropdown menu to select a separator for bookmarks.
- Use the **Page Offset** box to set a page offset as desired.
- Click **Change Offsets** to adjust top and/or bottom offsets.

Click **OK** to generate bookmarks.

5.9.4 **Generate Bookmarks from Text File**

Generate Bookmarks from Text File

Click **Generate Bookmarks from Text File** to create bookmarks from a text file:
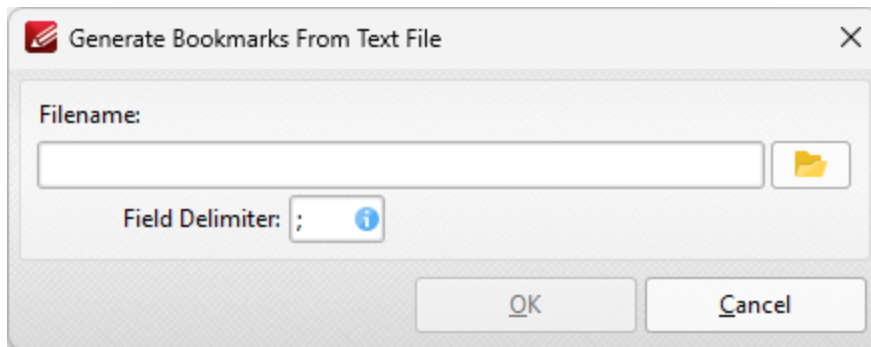
Figure 1. Generate Bookmarks From Text File Dialog Box

- Enter the name of the source text file 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 plain text **(*.txt)** format).
- Use the **Field delimiter** box to determine the field delimiter as required. **PDF-XChange Editor** will use the delimiter to define bookmarks in the source file.

Click **OK** to generate bookmarks.

Please note that the format of source files for this feature must be the same as that of files created using the feature.

Example

The following file can be used to create bookmarks in documents:
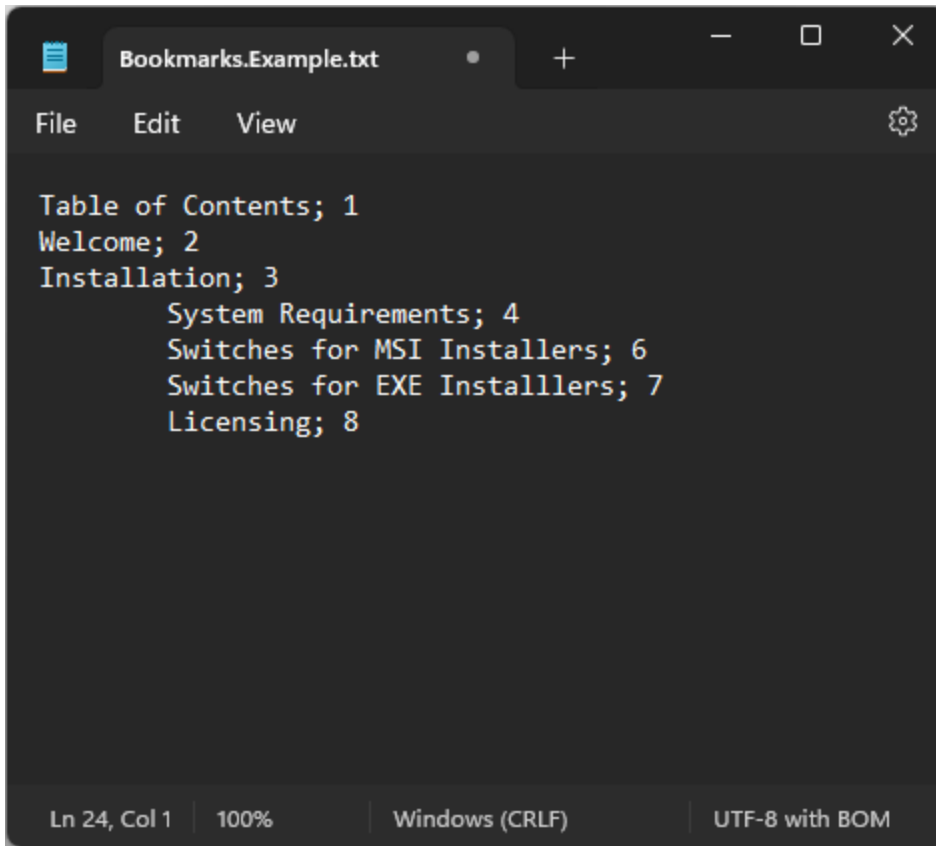
Figure 2. Example Bookmarks Text File

When this file is selected for use in conjunction with the **Generate Bookmarks from Text File** feature, bookmarks are created as detailed below:
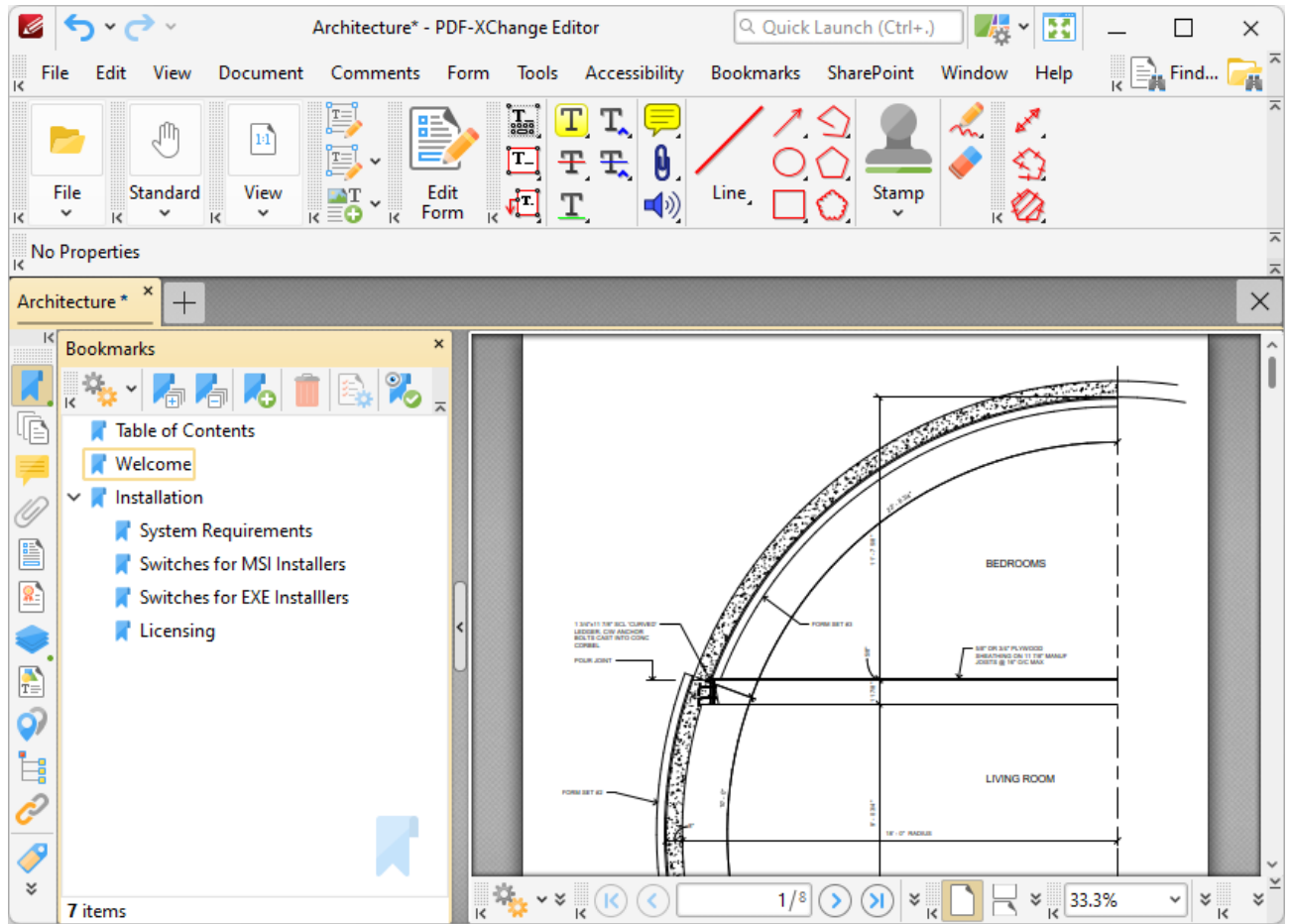
Figure 3. Bookmarks Created from Text File

5.9.5 **Add Text to Bookmark Titles**

Add Text to Bookmark Titles

Click **Add Text to Bookmark Titles** to add text to bookmark titles:
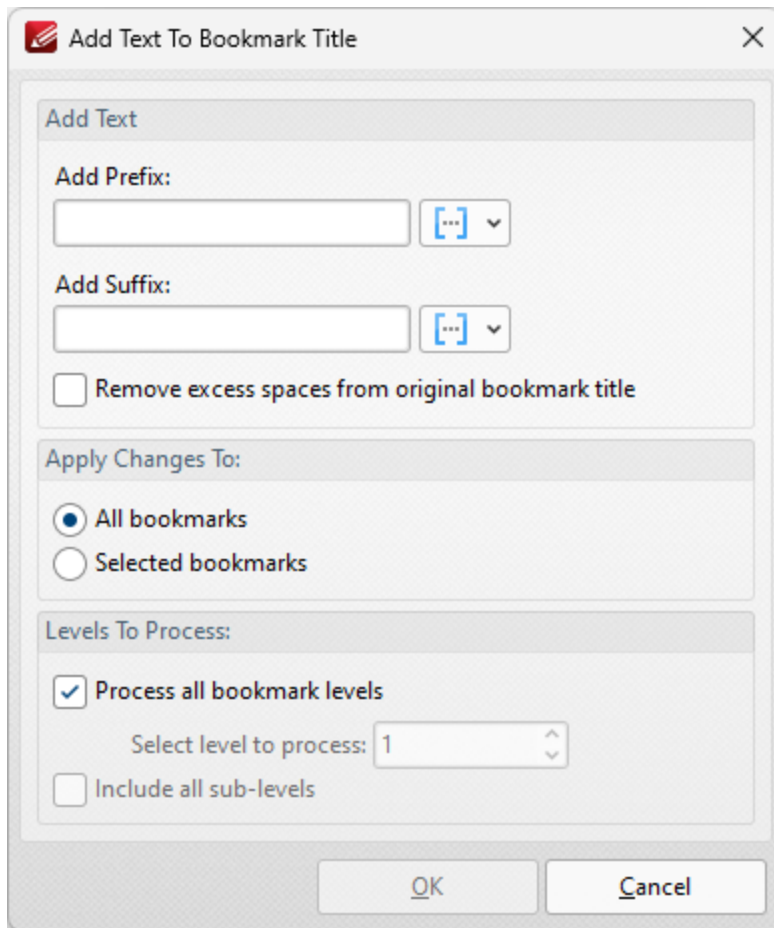
Figure 1. Add Text to Bookmark Title Dialog Box

- Use the **Add Prefix/Suffix** text boxes to add prefixes/suffixes to bookmark titles. Click the icon to add **macros.** [1157]
- Select the **Remove excess spaces from original Bookmark Title** box to remove additional spaces from bookmark titles.

- Select either **All Bookmarks** or **Selected Bookmarks** in the **Use Bookmarks** dropdown menu to determine which bookmarks are updated. Select bookmarks in the **Bookmarks** 504 pane in order to use the **Selected Bookmarks** option.
- Select the **Process all bookmark levels** box to process all bookmark levels. Alternatively, clear the box and select a customized level. The number entered in the number box determines the level of bookmarks that are processed. Select the **Include all sub-levels** box to include all bookmark levels.

Click **OK** to add text to bookmarks.

5.9.6 **Change Bookmark Case**

Change Bookmark Case

Click **Change Bookmark Case** to edit the case of bookmark text:
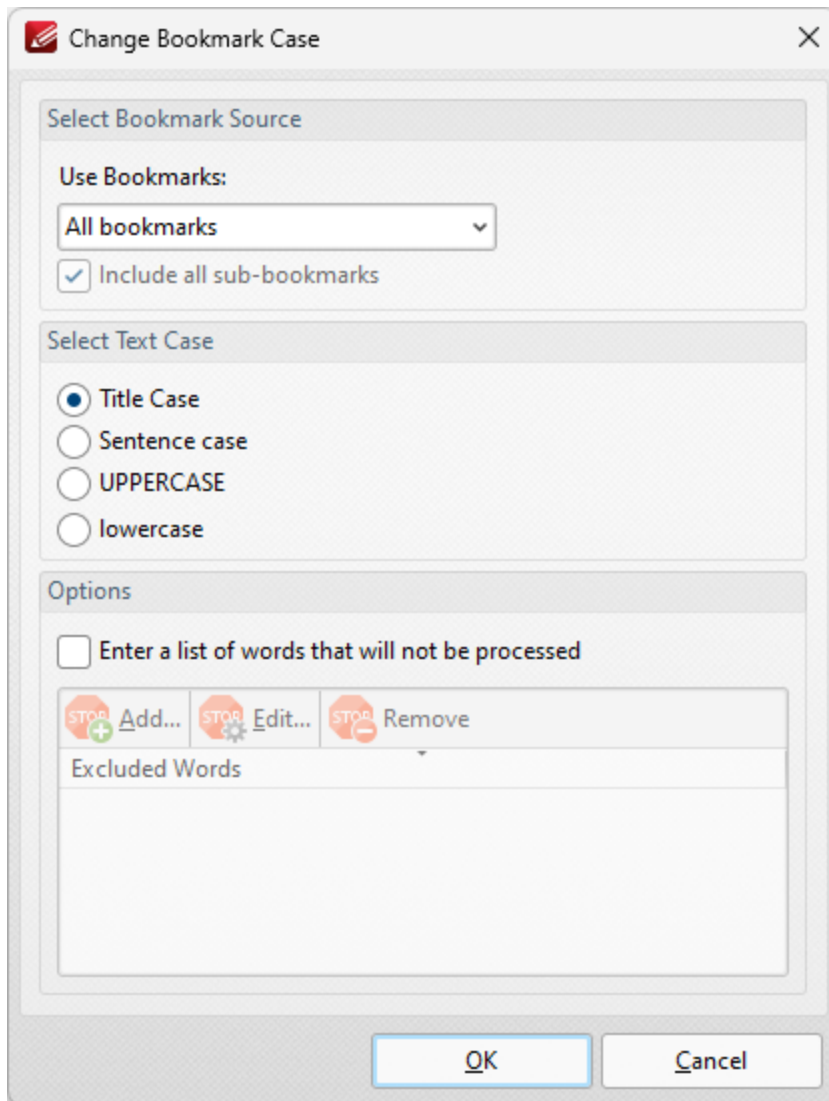
Figure 1. Change Bookmark Case Dialog Box

- Select either **All Bookmarks** or **Selected Bookmarks** in the **Use Bookmarks** dropdown menu to determine which bookmarks are updated. Select bookmarks in the **Bookmarks** 504 pane in order to use the **Selected Bookmarks** option.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks.
- Select an option from the **Select Text Case** option buttons to determine the new case for bookmark text.
- Select the **Enter a custom list of words that will not be processed** box to create/edit the list of words excluded from the process. Use the **Add, Edit** and **Remove** buttons to add, edit and remove words.

Click **OK** to update bookmark text.

5.9.7 **Change Bookmarks Zoom Factor**

Change Bookmarks Zoom Factor

Click **Change Bookmarks Zoom Factor** to edit the zoom factor of document bookmarks:
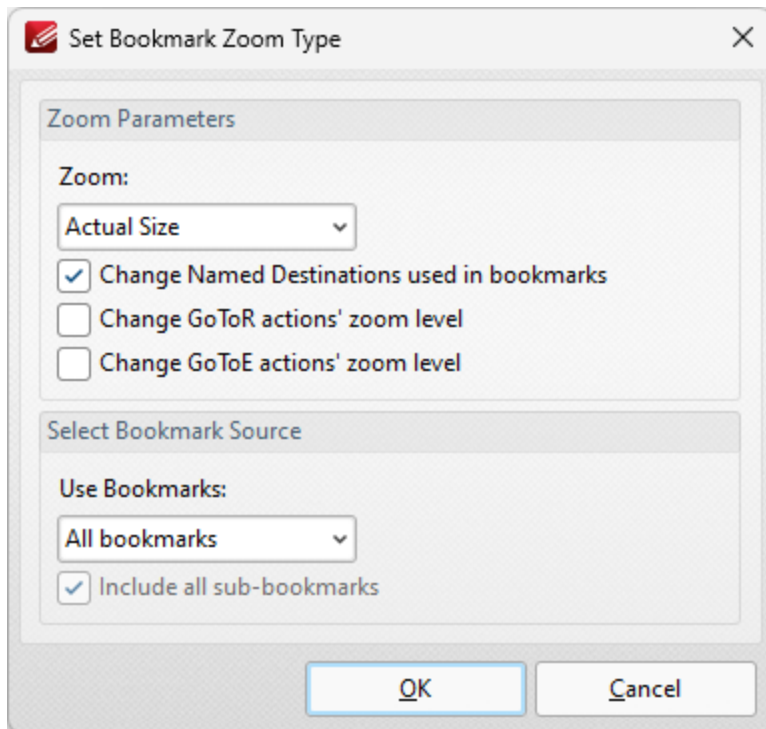
Figure 1. Set Bookmark Zoom Type Dialog Box

- Select an option in the **Zoom** dropdown menu to determine the new zoom level for bookmarks.
- Select the **Change Named Destinations used in Bookmarks** box to include named destinations in the operation.
- Select the **Change GoToR actions' zoom level** box to include links to other documents in the operation.
- Select the **Change GoToE actions' zoom level** box to include links to embedded documents in the operation.

Click **OK** to update the bookmark zoom settings.

5.9.8 **Convert Named Destinations to Regular Destinations**

![PDF-XChange Editor icon] **Convert Named Destinations to Regular Destinations**

Click **Convert Named Destinations to Regular Destinations** to convert named destinations into regular destinations. Named destinations are user-defined locations in documents that are created using the current view of the document at the time of their creation. They can be used in conjunction with **Bookmarks,** 504 **Go To Page** 997 actions and the **/Open** 1114 command line. Existing named destinations can be viewed in the **Named** 553 **Destinations** 553 pane. This feature converts named destinations into regular destinations, which means a different set of data is referenced to link to the destination. Named destinations use the current view at the time of their creation, whereas regular destinations use page numbers, page coordinates and either zoom level or a custom-sized rectangle. This means that regular destinations are not affected when document pages are moved or deleted, which is their main benefit in comparison to named destinations. When this feature is selected the following dialog box will open:
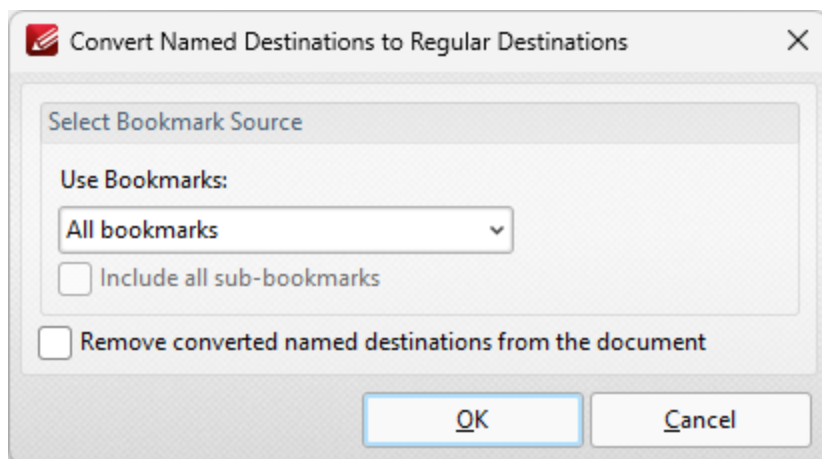
Figure 1. Convert Named Destinations To Regular Destinations Dialog Box

- Select either **All Bookmarks** or **Selected Bookmarks** in the **Use Bookmarks** dropdown menu to determine which bookmarks are updated. Select bookmarks in the **Bookmarks** 504 pane in order to use the **Selected Bookmarks** option.
- Select the **Include all sub-bookmarks** and **Remove converted named destinations from document** boxes as desired.

Click **OK** to convert named destinations to regular destinations.

5.9.9 **Find and Replace Bookmark Text**

Find and Replace Bookmark Text

Click **Find and Replace Bookmark Text** to locate and replace text in bookmark titles:
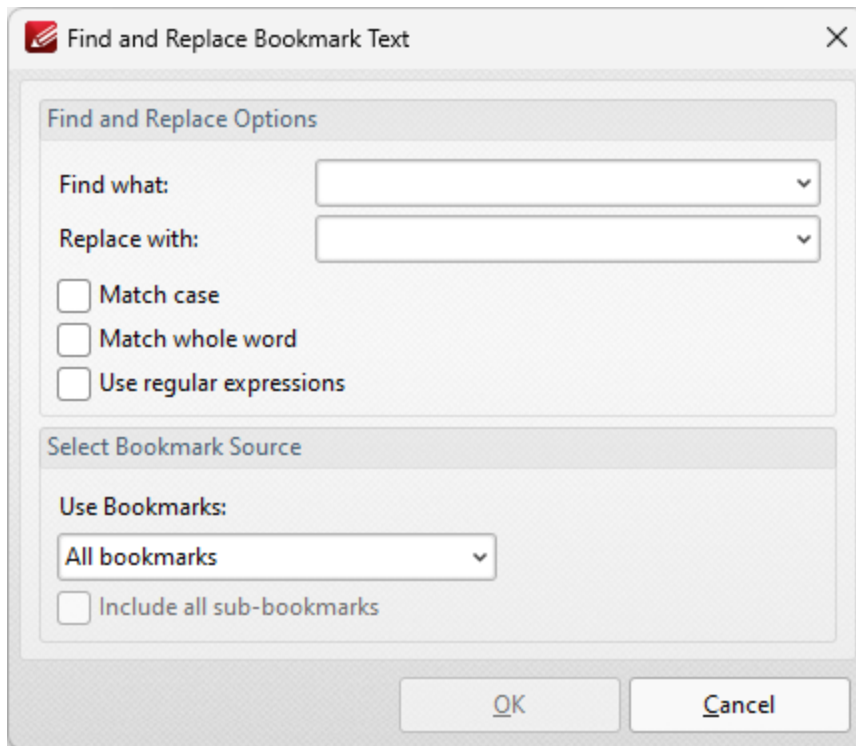
Figure 1. Find And Replace Bookmark Text Dialog Box

- Enter the terms to be replaced in the **Find what** text box.
- Enter the replacement terms in the **Replace with** text box.
- Select the **Match case, Match whole word** and **Use regular expressions** boxes as desired. Further information on regular expressions is available **here.** You can use **ECMAScript** regular expressions in conjunction with this feature.
- Select either **All Bookmarks** or **Selected Bookmarks** in the **Use Bookmarks** dropdown menu to determine which bookmarks are updated. Select bookmarks in the **Bookmarks** [504] pane in order to use the **Selected Bookmarks** option.
- Select the **Include all sub-bookmarks** box as desired.

Click **OK** to find and replace bookmark text.

5.9.10 Remove Actions from Actions List

Remove Actions from Actions List

Click **Remove Actions from Actions List** to remove actions from bookmarks:
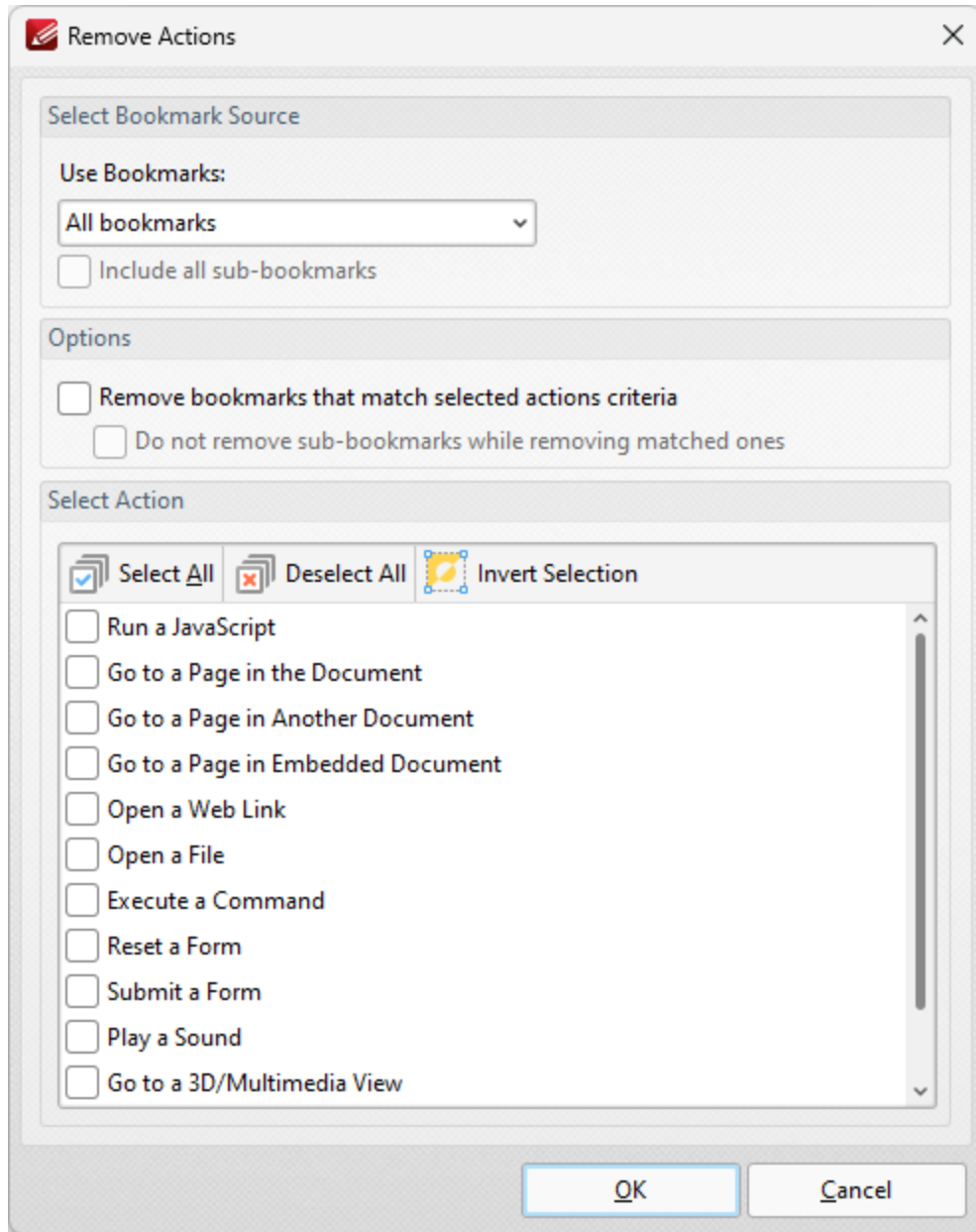
Figure 1. Remove Actions Dialog Box

- Use the dropdown menu to determine the bookmarks from which actions are removed.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks.
- Select the **Remove bookmarks that match selected action criteria** box to remove bookmarks that match the criteria specified in the **Select Actions** pane when the **Remove Actions** command is executed.
- Select the **Do not remove sub-bookmarks while removing matched ones** box to retain sub-bookmarks in cases where parent bookmarks are removed.
- Use the **Select Actions** pane to determine which actions are removed from bookmarks.
- Click **Select All/Deselect All** to select/deselect all bookmark actions.
- Click **Invert Selection** to invert the current selection of actions.

Click **OK** to remove actions from bookmarks.

5.9.11   Sort Bookmarks

Sort Bookmarks

Click **Sort Bookmarks** to sort existing document bookmarks:
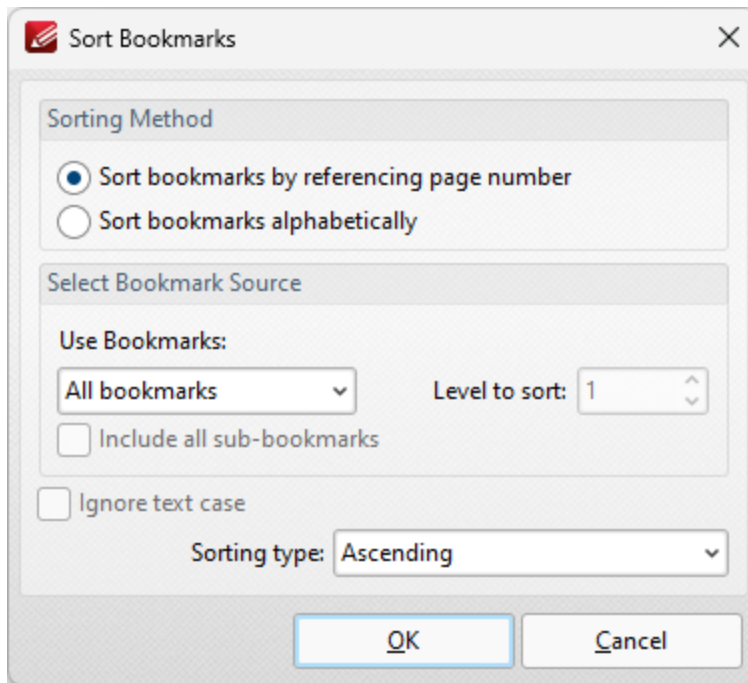
Figure 1. Sort Bookmarks Dialog Box

- Select either **Sort bookmarks by referencing page number** or **Sort bookmarks alphabetically** as desired.
- Select an option in the **Use Bookmarks** dropdown menu to determine the bookmarks to be sorted:
  - Select **All bookmarks** to sort all bookmarks.
  - Select **Children of selected** to sort child bookmarks of the bookmark currently selected.
  - Select **Bookmark level** to sort a level of bookmarks, then use the **Level to sort** number box to specify the level.
- Select the **Ignore text case** box to ignore the text case when the sorting bookmarks alphabetically.

- Use the **Sorting type** dropdown menu to select either **Ascending** or **Descending** as the sort mode for bookmarks.

Click **OK** to sort bookmarks.

5.9.12   Validate Bookmarks

Validate Bookmarks

Click **Validate Bookmarks** to determine the validity of bookmarks. The **Validate Bookmarks** dialog box will open, which contains a list of bookmark elements that can be validated:
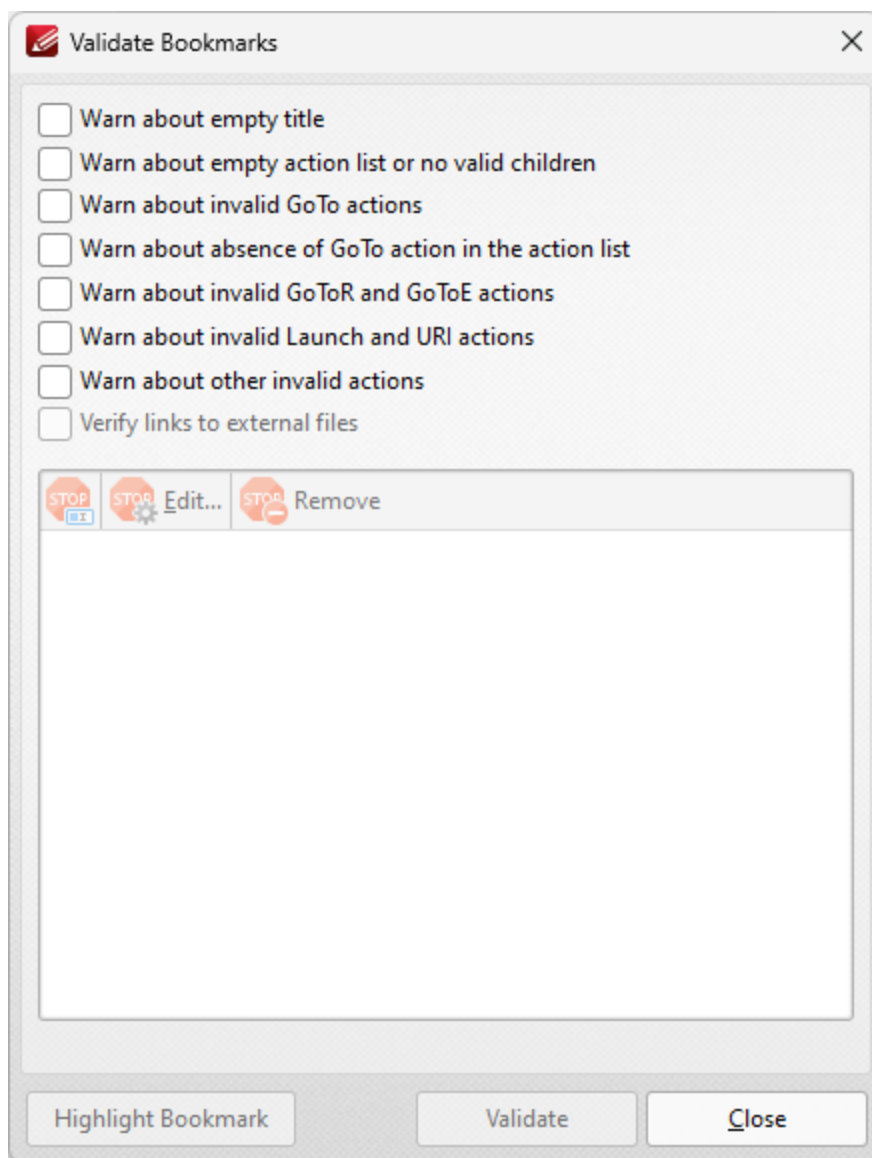
- Select boxes as desired to determine the elements of bookmarks to be validated.
- Click **Validate** to validate bookmarks. Bookmarks that fail validation are displayed in the pane. Select bookmarks in the pane and then click **Rename, Edit** or **Remove** as desired. If the option to edit bookmarks is selected then the **Action List** will be displayed for the bookmark. Use this list to determine the actions that take place when bookmarks are clicked. Note that the **Bookmarks** 504 pane can also be used to view/edit the **Action List** for bookmarks. Right-click bookmarks in the pane and then click **Properties** to view bookmark properties. The **Bookmark Properties** pane will open. Existing bookmark actions are detailed in the **Actions** tab:
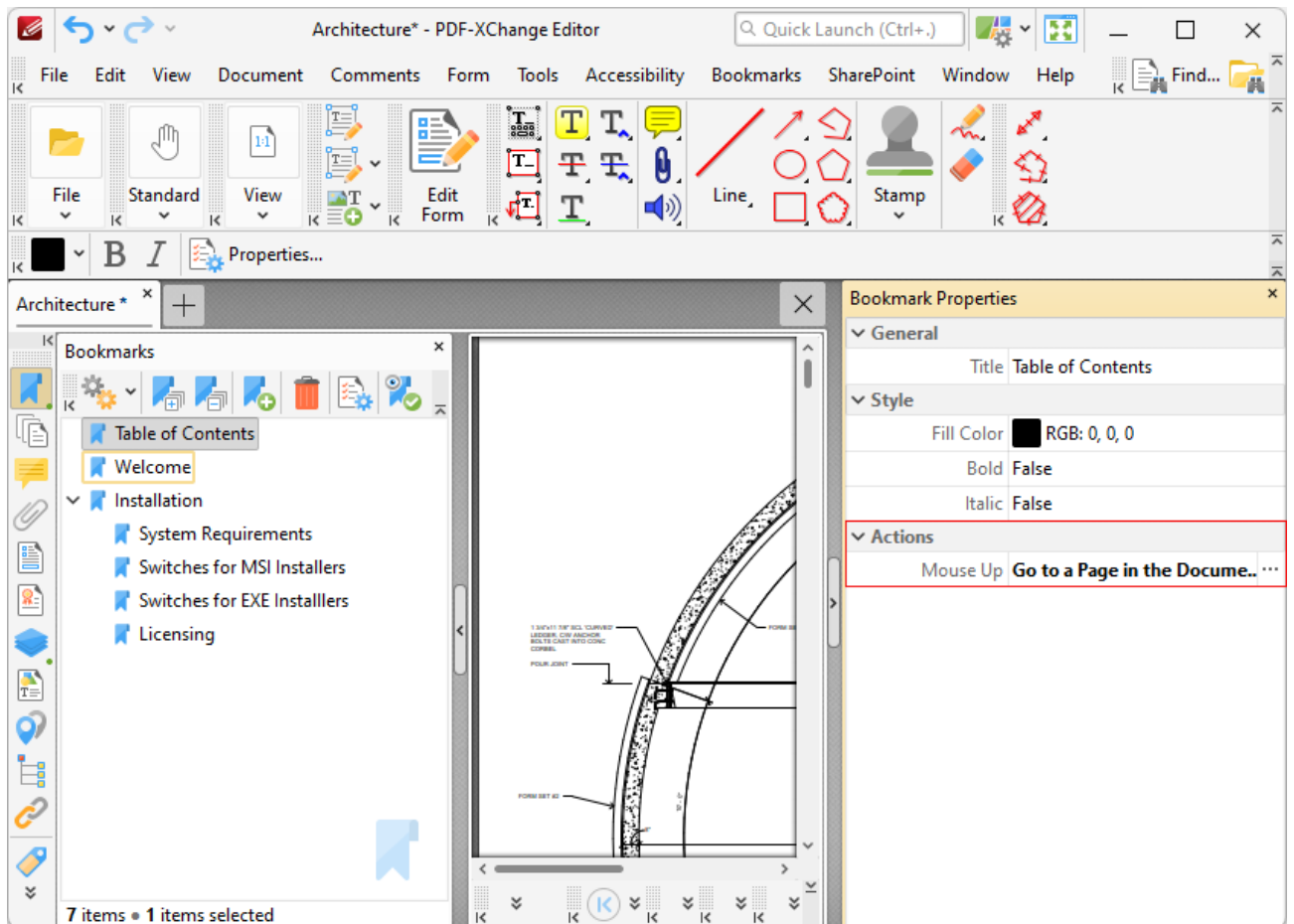
Figure 2. Bookmark Properties Pane, Action Tab

Click the ellipsis icon on the right of the tab to edit bookmark actions.

5.9.13 **Merge Duplicate Bookmarks**

Merge Duplicate Bookmarks

Click **Merge Duplicate Bookmarks** to merge bookmarks that have identical titles into single bookmarks. The **Merge Duplicate Bookmarks** dialog box will open:
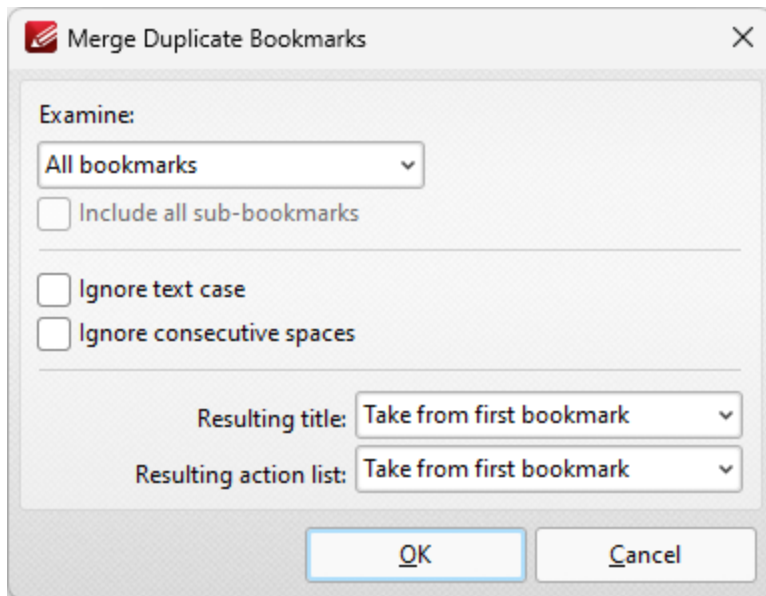
Figure 1. Merge Duplicate Bookmarks Dialog Box

- Use the **Examine** dropdown menu to specify either **All Bookmarks** or **Selected Bookmarks** to be examined in order to identify duplicate bookmarks to merge.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks in the search.
- Select the **Ignore text case** and/or **Ignore consecutive spaces** box to ignore text cases and consecutive spaces in bookmarks when **PDF-XChange Editor** examines bookmarks to merge.
- Use the **Resulting title** dropdown menu to specify which bookmark title is used to create the name for merged bookmarks.
- Use the **Resulting action list** dropdown menu to specify which action list is used for merged bookmarks.

Click **OK** to merge duplicate bookmarks.

5.9.14   **Build Table of Contents**

Build Table of Contents

Click **Build Table of Contents** to create a table of contents from the current document bookmarks:
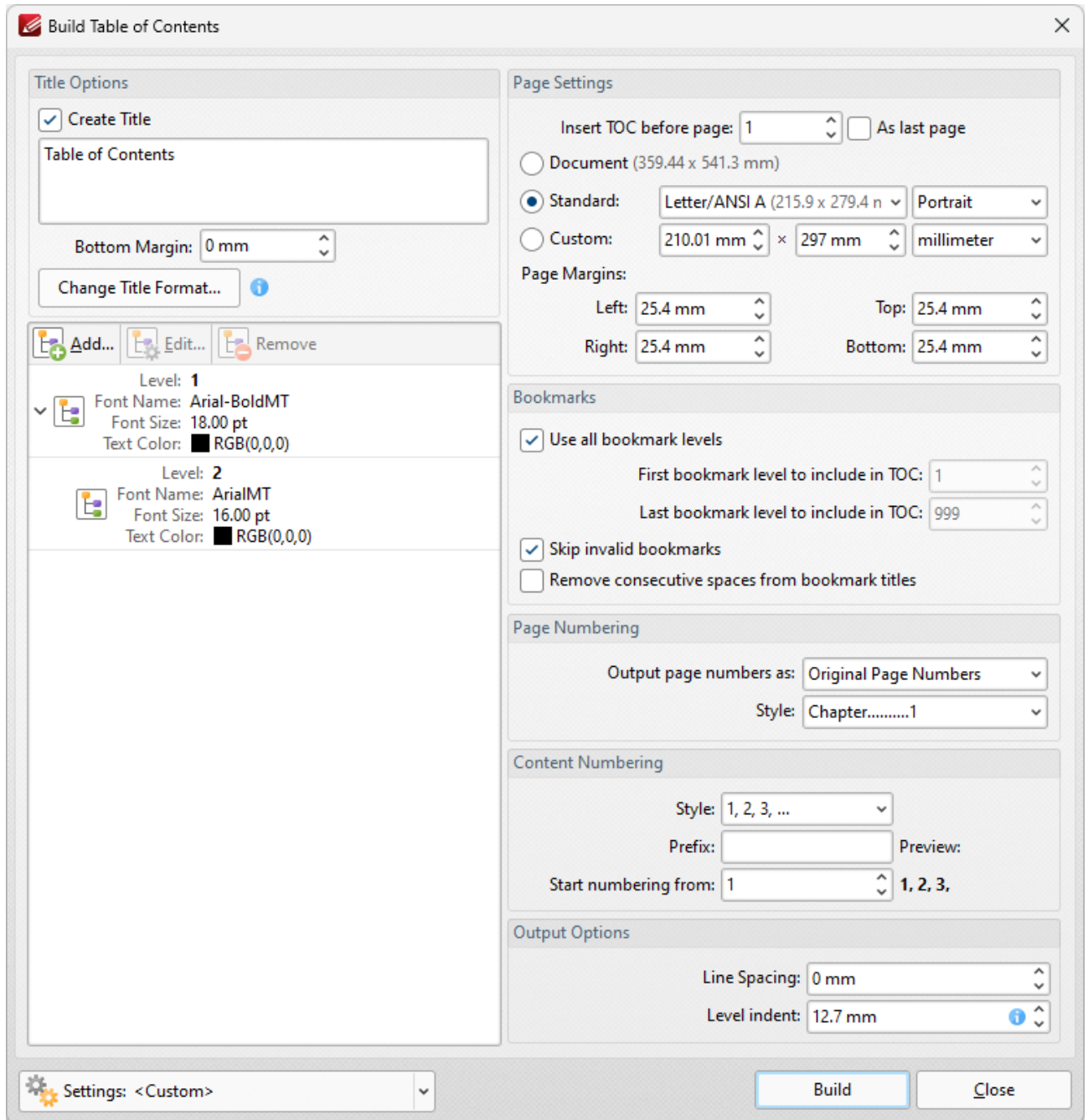
Figure 1. Build Table of Contents Dialog Box

- Enter a title for the table of contents in the **Title** text box.
- Click **Change Title Format** to edit the font and style of the title.
- The style for each level in the table of contents is detailed in the pane on the left. The levels correspond to the levels of the bookmark tree. Click **Add, Edit** or **Remove** to add, edit or remove levels.
- Use the **Insert TOC before page** number box to set the location of the table of contents, or select the **As last page** box to insert it at the end of the document.
- Select an option button to determine the page size of the table of contents:

- **Document** uses the same page size as the pages of the source document.
- **Standard** contains a list of standard page sizes, such as those used by the **ISO** and **ANSI.** Select an option from the list and then select **Portrait** or **Landscape** as desired in the dropdown menu on the right.
- **Custom** uses custom page dimensions. Enter the desired dimensions in the number boxes and select a unit of measurement from the dropdown menu.
- Use the **Page Margins** number boxes to determine the page margins used for the table of contents.
- Select the **Use all bookmark levels** to include all bookmark levels in the creation of the table of contents. Alternatively clear the box and use the number boxes to determine the first and last bookmark levels to be included.
- Select the **Skip invalid bookmarks** box to exclude invalid bookmarks from the table of contents.
- Select the **Remove consecutive spaces from bookmark titles** box to rectify instances of consecutive white spaces.
- Select an option from the **Output page numbers as** dropdown menu to determine the format of page numbers in the table of contents:
  - **Original Page Numbers** uses the page number of pages.
  - **Page Labels** uses the page labels of pages. These labels are detailed in the **Thumbnails**⌐510⌐ pane for pages.
  - **Bates Numbers** uses the Bates number of pages.
- Select an option from the **Style** menu to determine the style of the table of contents.
- Click the **Settings** dropdown arrow to save/manage/delete custom settings:
  - Click **Save Current Settings** to save the current settings as a profile for subsequent use.
  - Click **Delete** to delete selected profiles. Note that this option is only available for customized profiles.
  - Click **Manage** to manage preset/customized profiles. The **Manage Presets** dialog box will open:
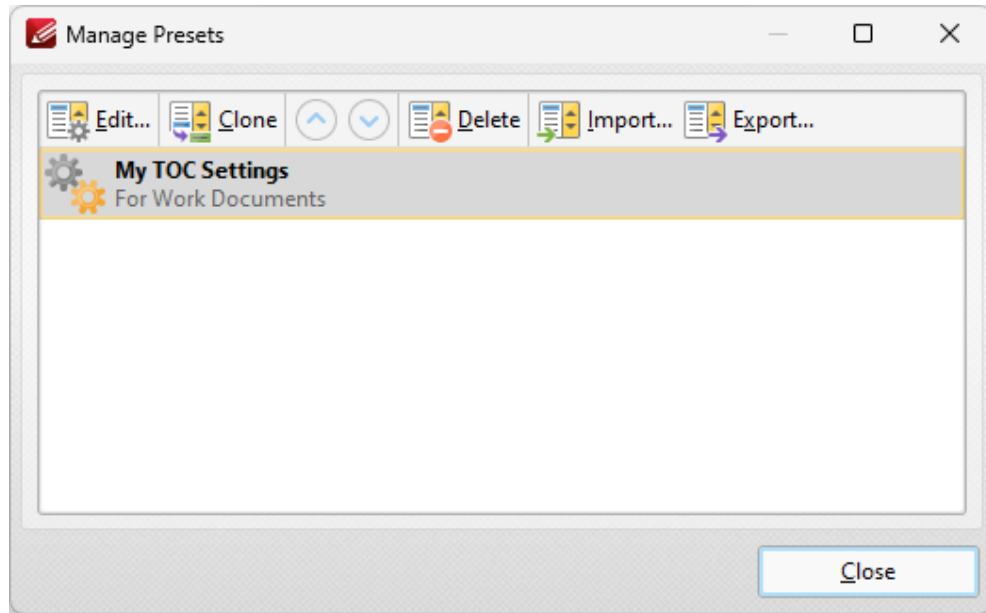
Figure 2. Manage Presets Dialog Box

- Click **Edit** to edit selected profiles. Note that this option is only available for customized profiles.
- Click **Clone** to clone selected profiles. This option can be used to customize the settings of preset profiles, which cannot be customized in the default state.
- Use the up and down arrows to move selected profiles up or down in the list.
- Click **Delete** to delete selected profiles. Note that this option is only available for customized profiles.
- Click **Import** to import profiles from a saved file.
- Click **Export** to export profiles to file.

Click **Build** to create the table of contents.

5.9.15 **Create Links from Bookmarks**

Create Links from Bookmarks

Click **Create Links from Bookmarks** to create links in document text from bookmarks:
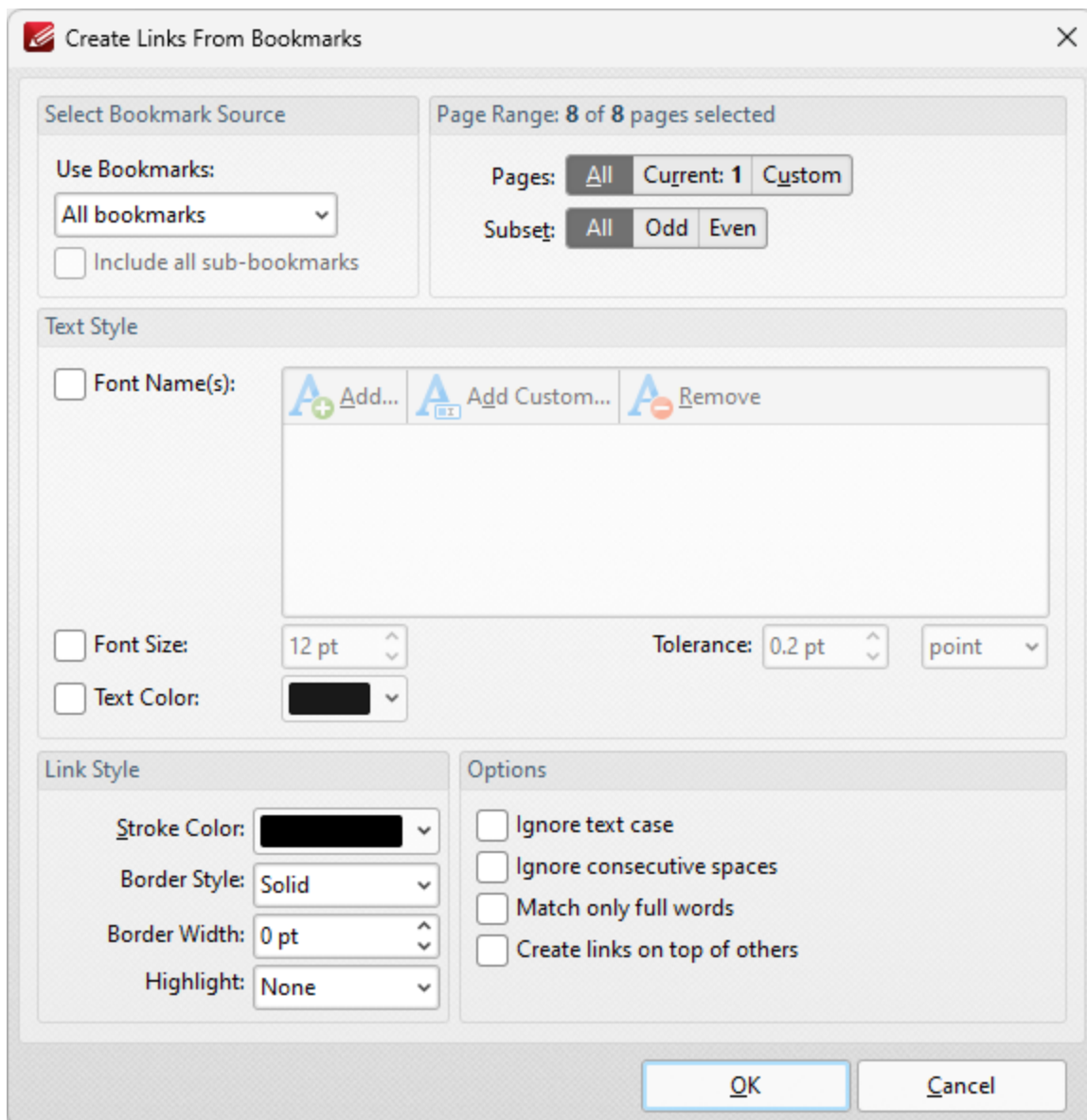
Figure 1. Create Links from Bookmarks Dialog Box

- Use the **Use Bookmarks** dropdown menu to determine the bookmarks used to create links.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks.
- Use the **Page Range** options to determine the page range from which links are created. Further information about page range specification is available **here.** 1274
- Use the **Text Style** options as necessary in order to specify the size and style options of document text that you want to convert to links. These options are included in order to make it possible to distinguish between several instances of the same text within documents. If there is only a single instance of the text then it is not necessary to use these options.
- Use the **Link Style** options to determine the style of links.
- Select boxes in the **Options** section to enable/disable options for creating links.

Click **OK** to create links from bookmarks.

5.9.16 **Sort Pages by Bookmarks**

 Sort Pages by Bookmarks

Click **Sort Pages by Bookmarks** to sort document pages according to the order of bookmarks:
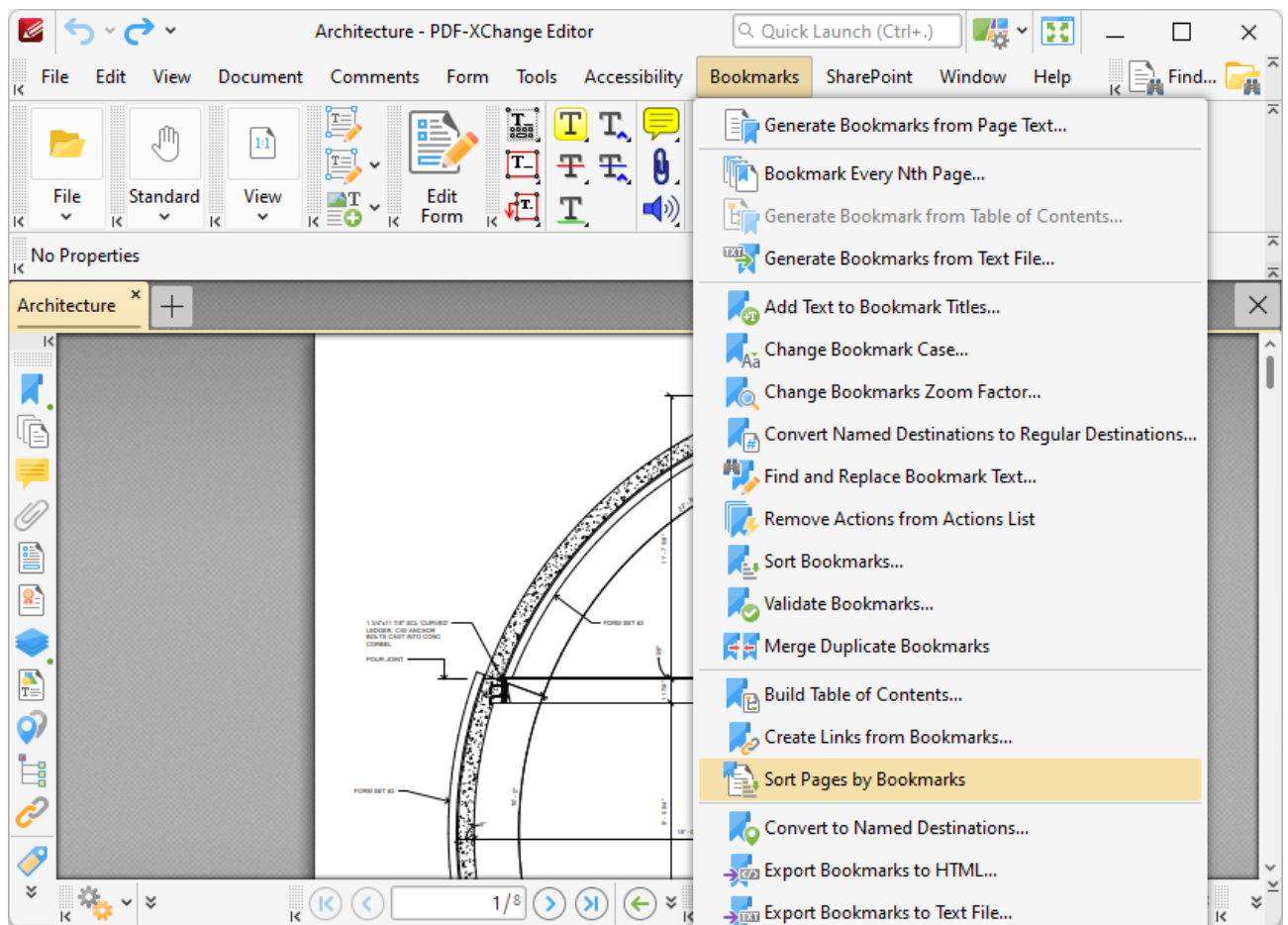
Figure 1. Bookmarks Tab Submenu, Sort Pages by Bookmarks

PDF-XChange Editor will then reorder document pages to match the order of bookmarks.

5.9.17 **Convert to Named Destinations**

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Convert to Named Destinations

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Click **Convert to Named Destinations** to convert regular bookmark destinations into named destinations. Regular bookmark destinations reference a page number, page coordinates and either a zoom level or a custom-sized rectangle when they are used. Named destinations are user-defined locations in documents that are created using the current view of the document at the time of their creation. They can be used in conjunction with **Bookmarks,** 504 **Go To Page** 997 actions and the **/Open** 1114 command line. This feature converts regular destinations into named destinations, which means the associated bookmark will reference the same page view after pages are moved/reordered, which is their main benefit in comparison to regular destinations. When this feature is selected the following dialog box will open:
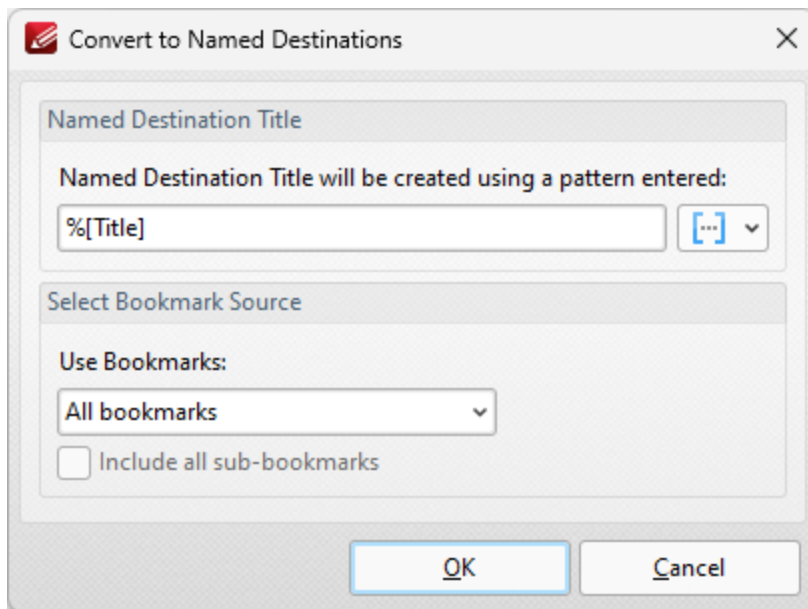
Figure 1. Convert to Named Destinations Dialog Box

- Enter a name for the new named destination in the **Named Destination Title** box. The default value is **%[Title],** which means the name of the associated bookmark is used. Click the blue icon to add **macros** 1157 as desired.

- Select either **All Bookmarks** or **Selected Bookmarks** in the **Use Bookmarks** dropdown menu to determine which bookmarks are updated. Select bookmarks in the **Bookmarks** [504] pane in order to use the **Selected Bookmarks** option.
- Select the **Include all sub-bookmarks** box as desired.

Click **OK** to convert regular destinations to named destinations. Note that named destinations can be viewed in the **Named Destinations** [553] pane.

5.9.18   Export Bookmarks to HTML

Export Bookmarks to HTML

Click **Export Bookmarks to HTML** to export document bookmarks to an HTML file:
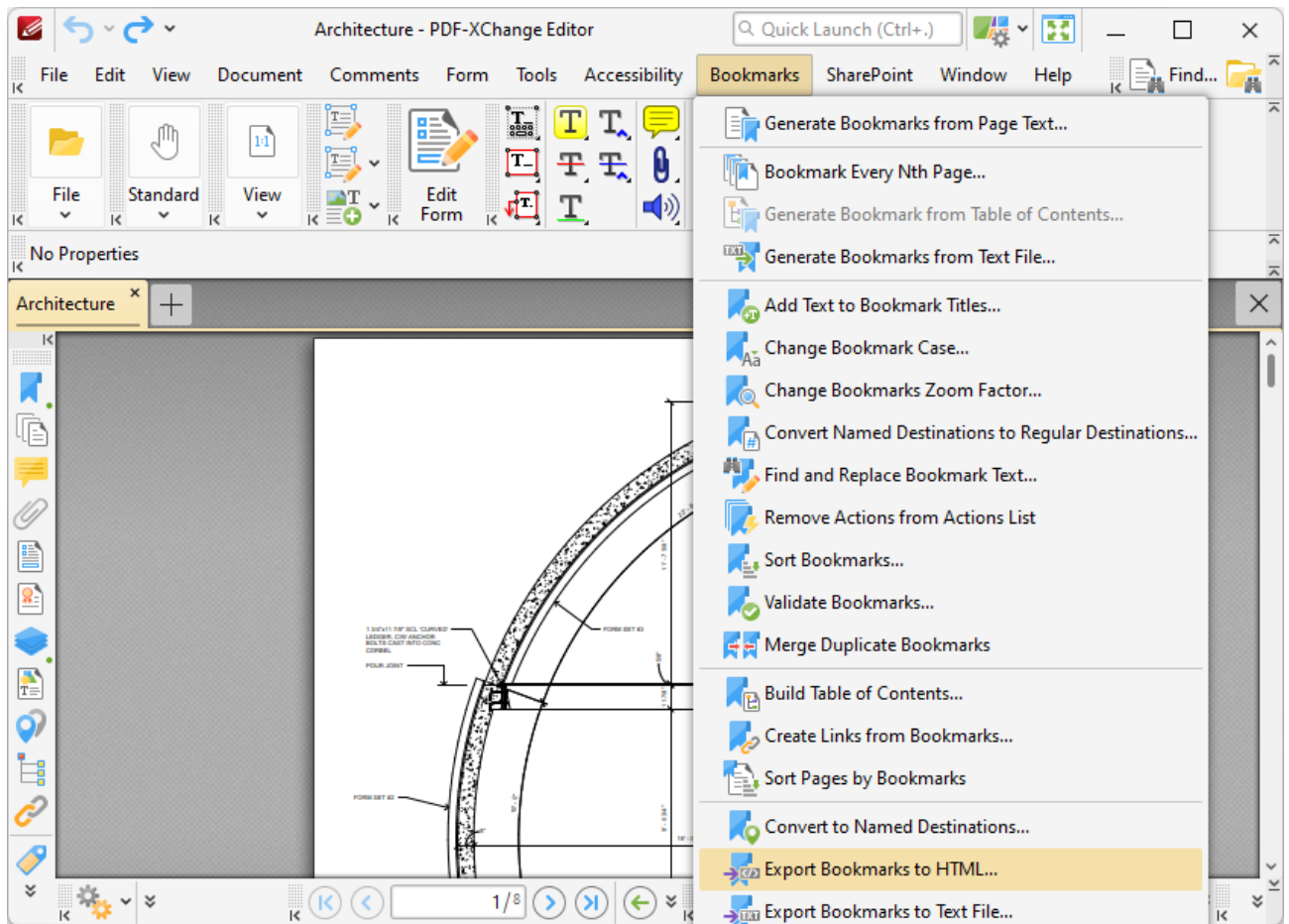
Figure 1. Bookmarks Tab Submenu, Export Bookmarks to HTML

The **Save File** dialog box will open. Enter the desired name for the file in the **File name** text box and click **Save** to export the file.

5.9.19   Export Bookmarks to Text File

Export Bookmarks to Text File

Click **Export Bookmarks to Text File** to export bookmarks to a **(*.txt)** text file. The following dialog box will be displayed:
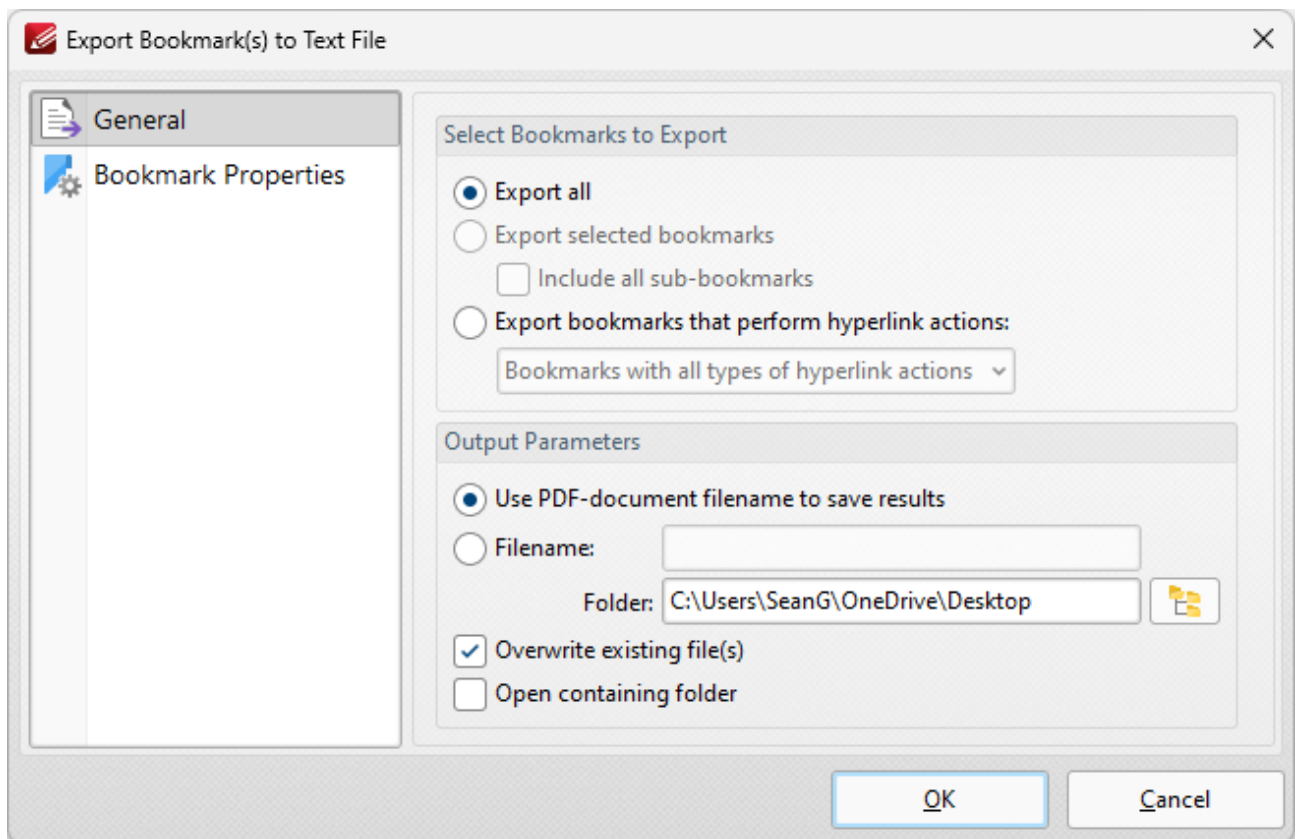
Figure 1. Export Bookmarks to Text File Dialog Box, General Tab Selected

Select the **General** tab to determine general export options:

- Select the **Export all** option button to export all bookmarks.
- Select the **Export selected bookmarks** option button to to export only selected bookmarks. Select bookmarks in the **Bookmarks** 504 pane to use this option. Select the **Include all sub-bookmarks** box as desired.

- Select the **Export bookmarks that perform hyperlink actions** option button to export only bookmarks that perform hyperlink actions. Use the dropdown menu to determine which bookmarks are included in the process.
- Select the **Use PDF-document filename to save results** option button to use the name of the current document as the name of the text file.
- Alternatively, enter a name in the **Filename** text box. Use the **Folder** text box to determine the destination folder, or click the icon to select the folder manually.
- Select the **Overwrite existing files** box to overwrite files that have the same name in the destination folder.
- Select the **Open containing folder** box to open the containing folder at the end of the operation.

Select the **Bookmark Properties** tab to determine which bookmark properties are exported:
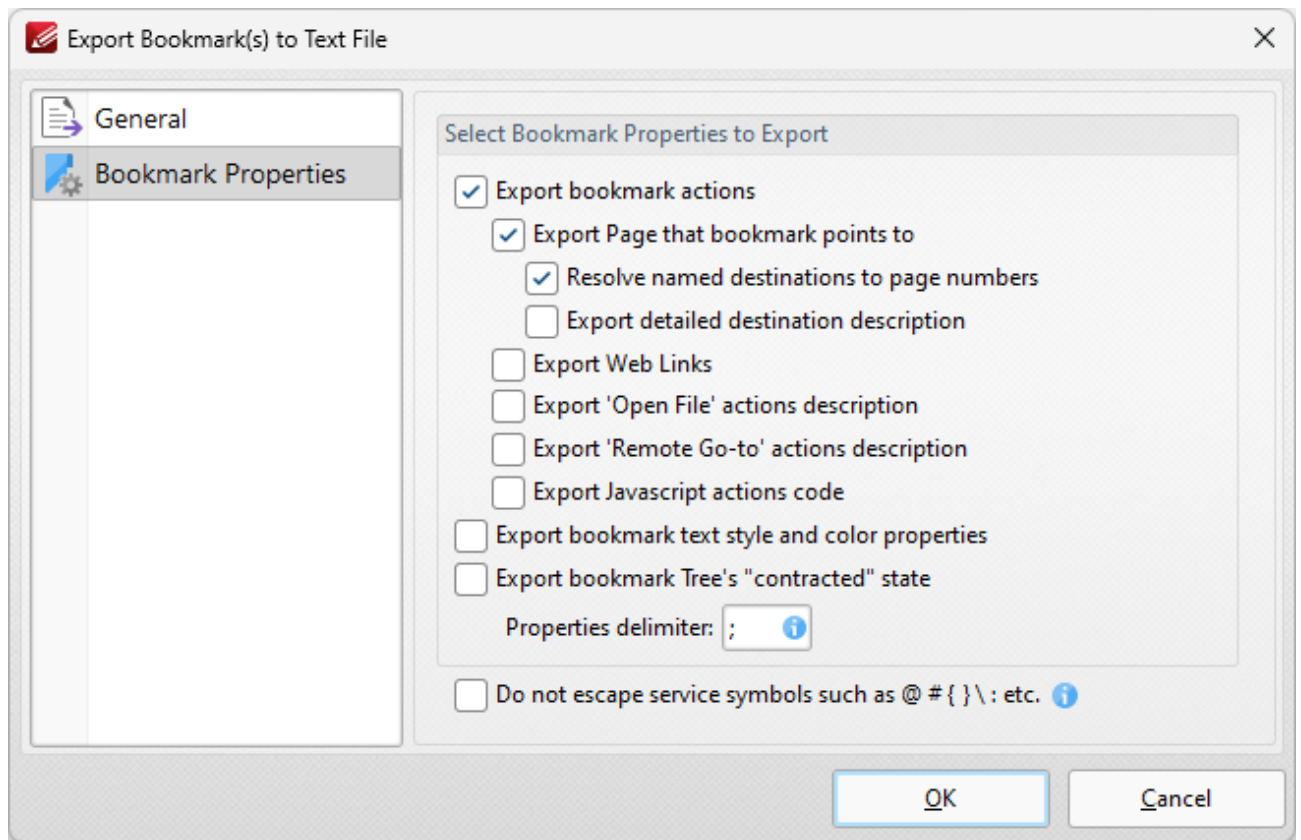
Figure 2. Export Bookmarks to Text File Dialog Box, Bookmark Properties Tab Selected

- Select the **Export bookmark actions** box to include bookmark actions in the export.
- Select the **Export Page that bookmark points to** box to include the page number of bookmark links.
- Select the **Resolve named destinations to page numbers** box to display named destinations as page numbers in the created text file. If this box is not selected then the name of the named

destination will be exported instead. Further information on named destinations is available **here.** 553

- Select the **Export detailed destination description** box to export a more detailed description of named destinations.
- Select the **Export Web Links** box to include weblinks in the export file.
- Select the **Export 'Open File' actions description** to include a description of **'Open File'** actions in the export file. These actions open files when bookmarks are clicked. Further information on bookmark actions is available **here.** 504
- Select the **Export 'Remote Go-to' actions description** box to include a description of **'Go-To'** actions in the export file. These actions navigate to a document page when bookmarks are clicked. Document pages can be located in the current document, a different document or an embedded document. Further information on bookmark actions is available **here.** 504
- Select the **Export JavaScript actions code** box to include bookmark JavaScript actions in the export file. These actions execute JavaScript when bookmarks are clicked. Further information on bookmark actions is available **here.** 504
- Select the **Export Bookmark text style and color properties** box as desired.
- Select the **Export bookmark tree's "contracted" state** box to export bookmarks in collapsed format.
- Use the **Properties delimiter** box to set the delimiter that separates bookmark properties in the text file.
- Select the **Do not escape service symbols** box as desired. If the files that the **Export Bookmarks to Text Files** feature creates will be used in conjunction with the **Generate Bookmarks from Text File** feature then it is advisable to select this box.

Click **OK** to export bookmarks to text file.

5.10 SharePoint

SharePoint

Hover over **Sharepoint** to open the following submenu:
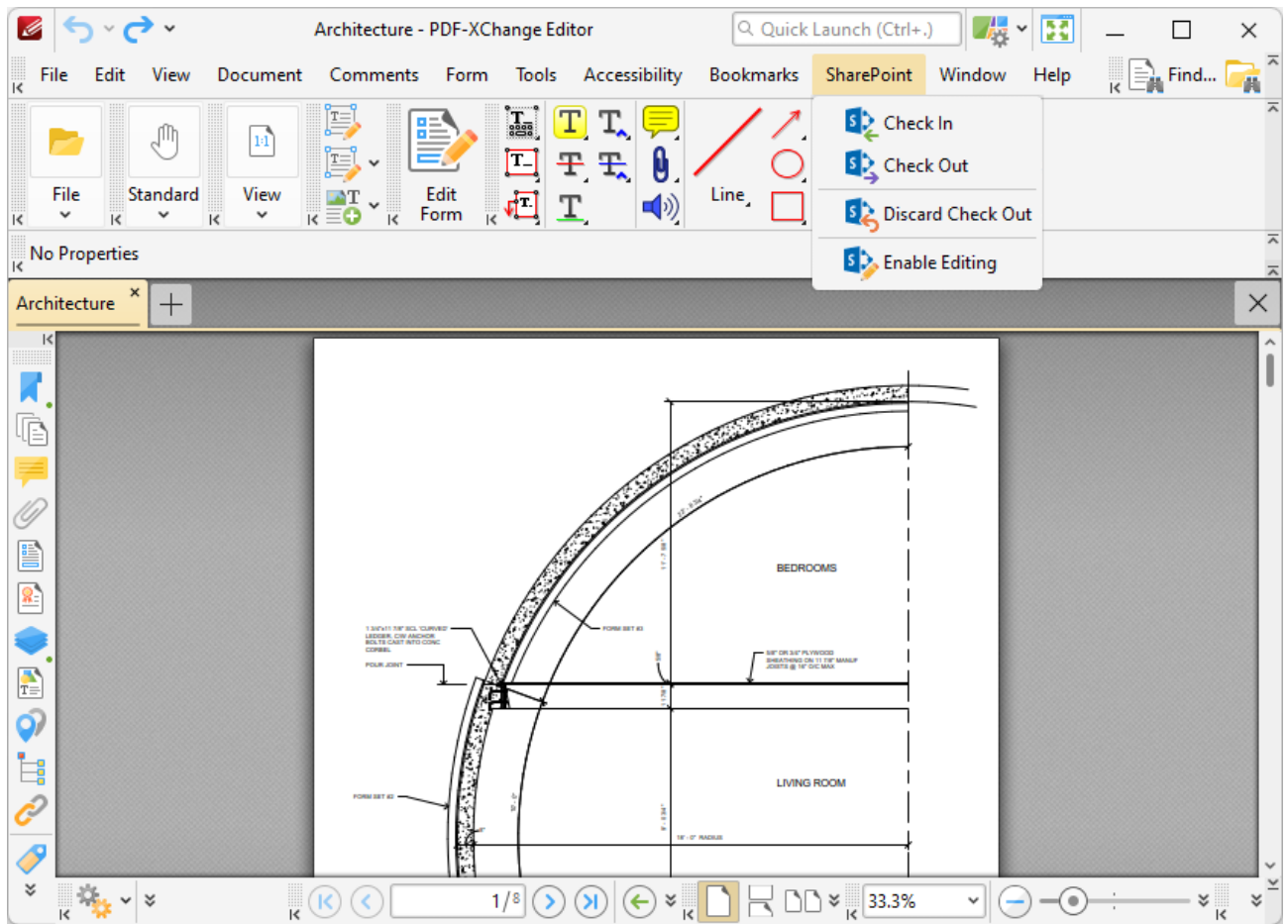
Figure 1. SharePoint Submenu

SharePoint facilitates the convenient sharing of files for group viewing/editing. The options in the **SharePoint** submenu become available when **Sharepoint** files are opened in **PDF-XChange Editor.** Follow the steps below to open **SharePoint** files:

1. Click **File** in the **Menu Toolbar.** [473]

2. Hover over **Open From,** then hover over **Add a Place** and click **SharePoint.** The **PDF-XChange Editor Sharepoint** dialog box will open.

4. Enter the URL for the **SharePoint** file.

5. Click **Navigate.**

6. The **Authentication Required** dialog box will be displayed. Enter the **SharePoint** credentials and click **OK.** The **Open File** dialog box will open:
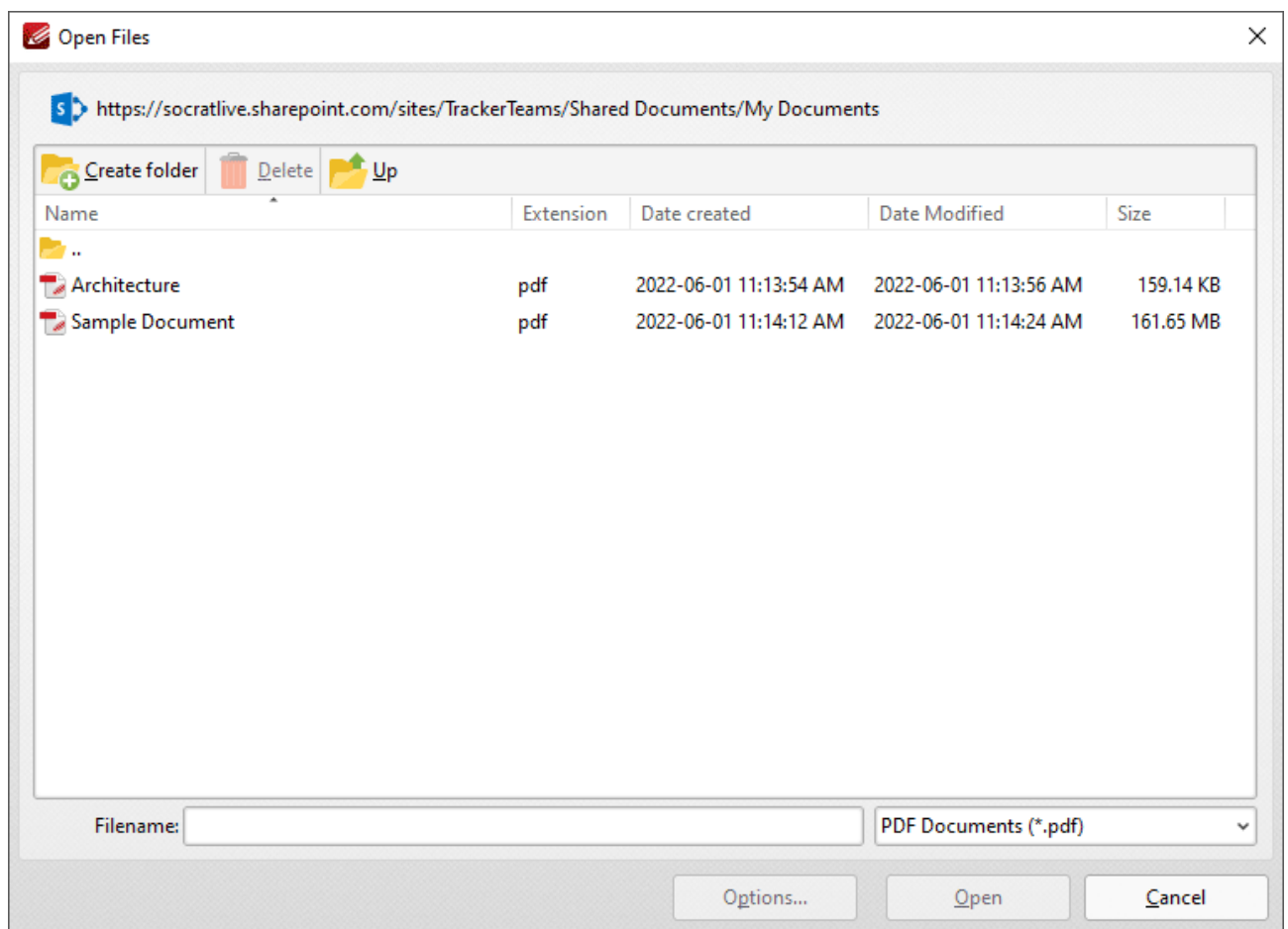
Figure 2. SharePoint Open Files Dialog Box

7. Select the desired file from the list and click **Open** or **Open with Check Out.** Click **Open** to make the file both available and editable for other users. Click **Open with Check Out** to make the file editable for the current user only, and read-only for other users. Further information on using **SharePoint** is available **here.**

The document is then displayed in **PDF-XChange Editor:**
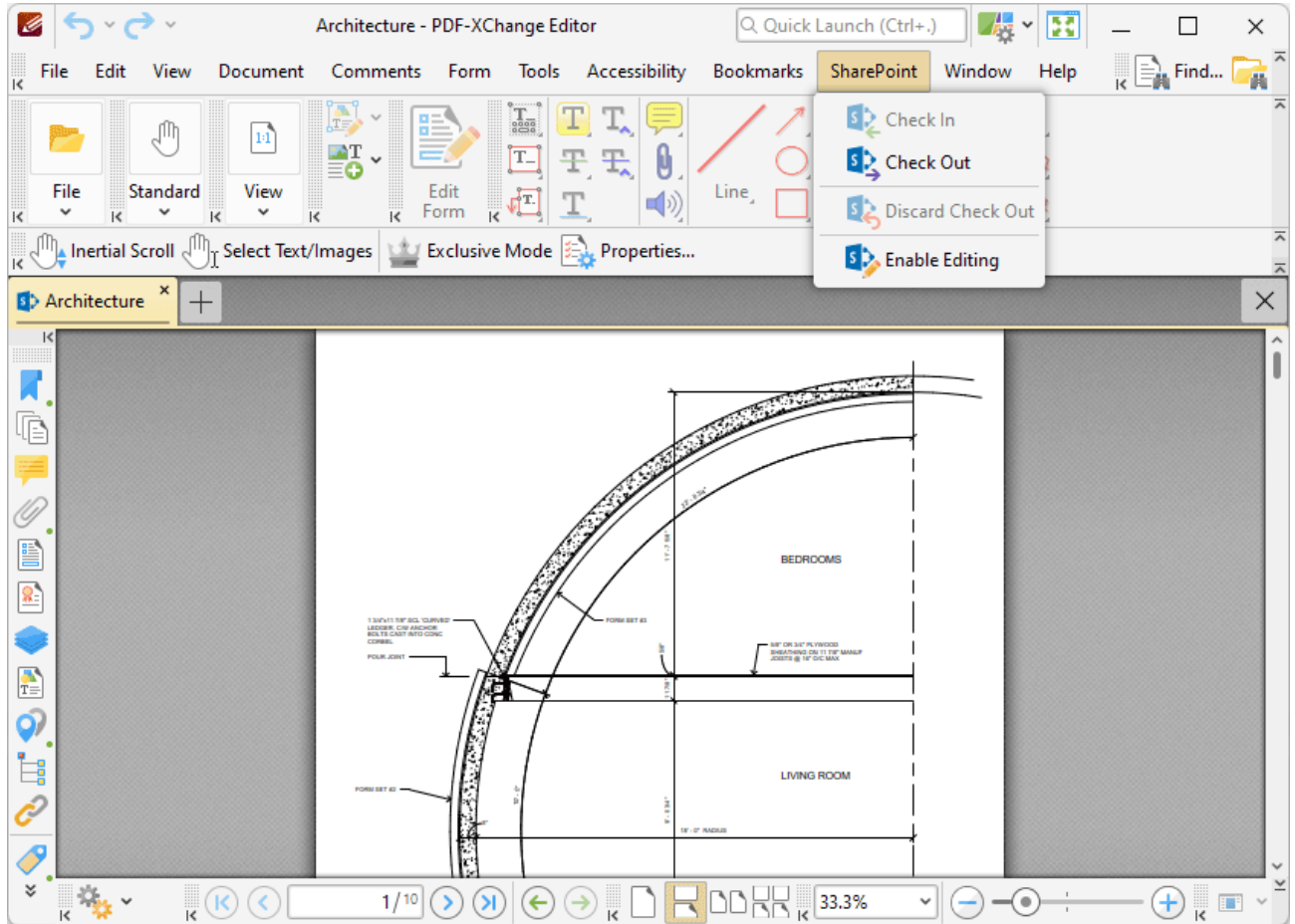
Figure 3. SharePoint File Displayed in PDF-XChange Editor, SharePoint Options Displayed

- Click **Enable Editing** to enable editing for the document.
- Click **Check Out** to check the document out from **SharePoint.**

When you use either of these options and then make changes to and save a document, the changes will be saved in the version of the document stored at the **SharePoint** location. If you check out a document, make changes to it and check the document back in to **SharePoint,** then the following dialog box will be displayed:
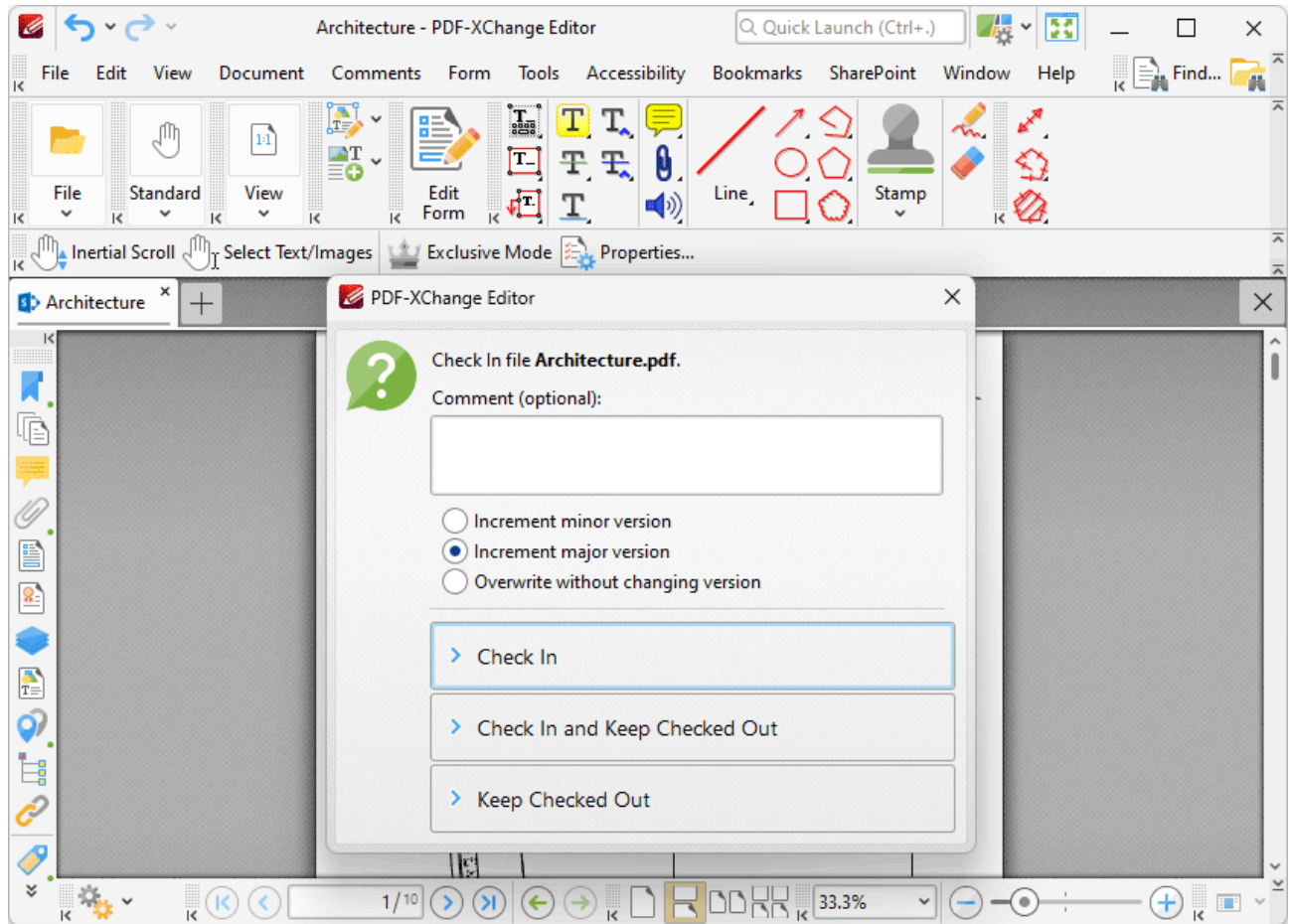
Figure 4. SharePoint Check In Options

- If you want to add a comment about the changes that you made to the document then enter them in the **Comment** text box.
- Select the **Increment minor version** button to specify an increment in the minor version of the document.
- Select the **Increment major version** button to specify an increment in the major version of the document.
- Select the **Overwrite without changing version** button to overwrite the existing document with changing the version number.
- Click **Check In** to check the document in to **SharePoint.**
- Click **Check in and Keep Checked Out** to check the document in to **SharePoint** (i.e. update the version that is saved there) and also keep the document checked out.
- Click **Keep Checked Out** to keep the document checked out.

If you are using **PDF-XChange Editor** as part of the **PDF-XChange PRO** bundle, then the additional functionality detailed below is also available:

Using SharePoint to Interact with Files in PDF-XChange Editor

Your documents are detailed in the **Documents** section of your **SharePoint** account. You can use the options highlighted in the image below to open selected documents in **PDF-XChange Editor:**
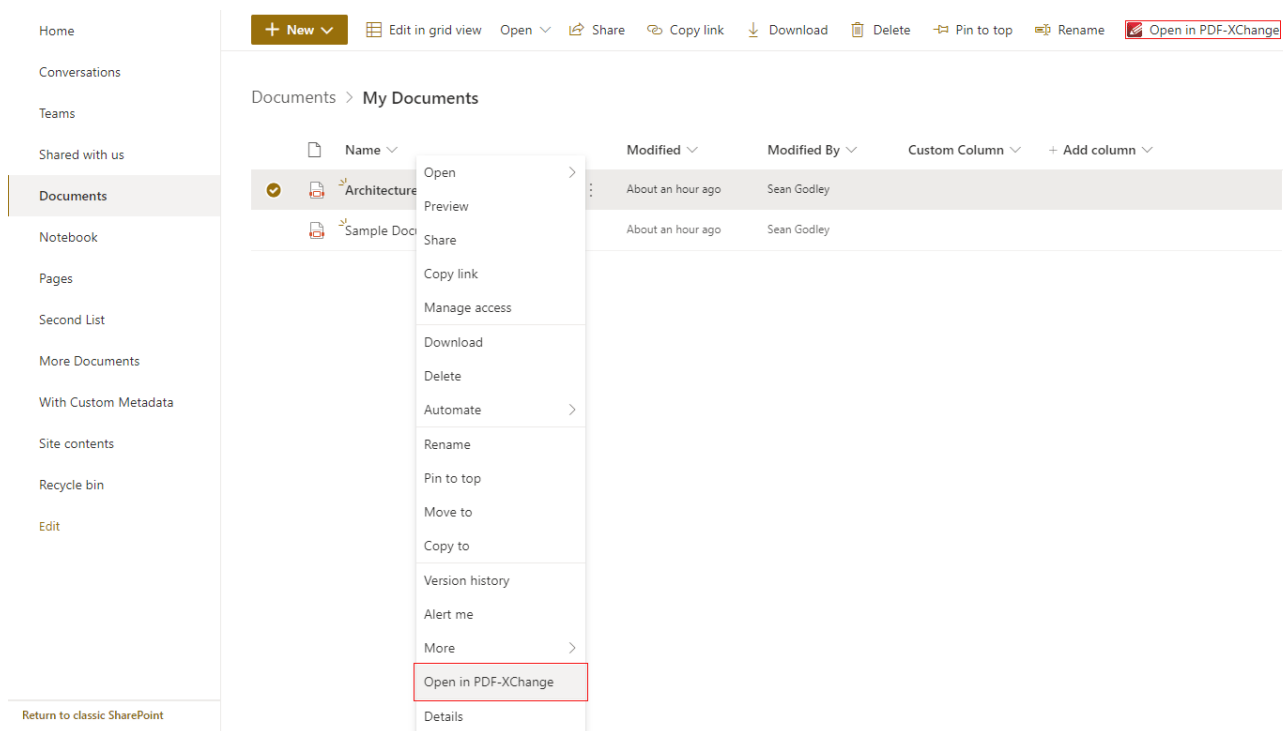
Figure 5. SharePoint, Open in PDF-XChange Options

5.11 Window

Window

Hover over **Window** to open the following submenu:
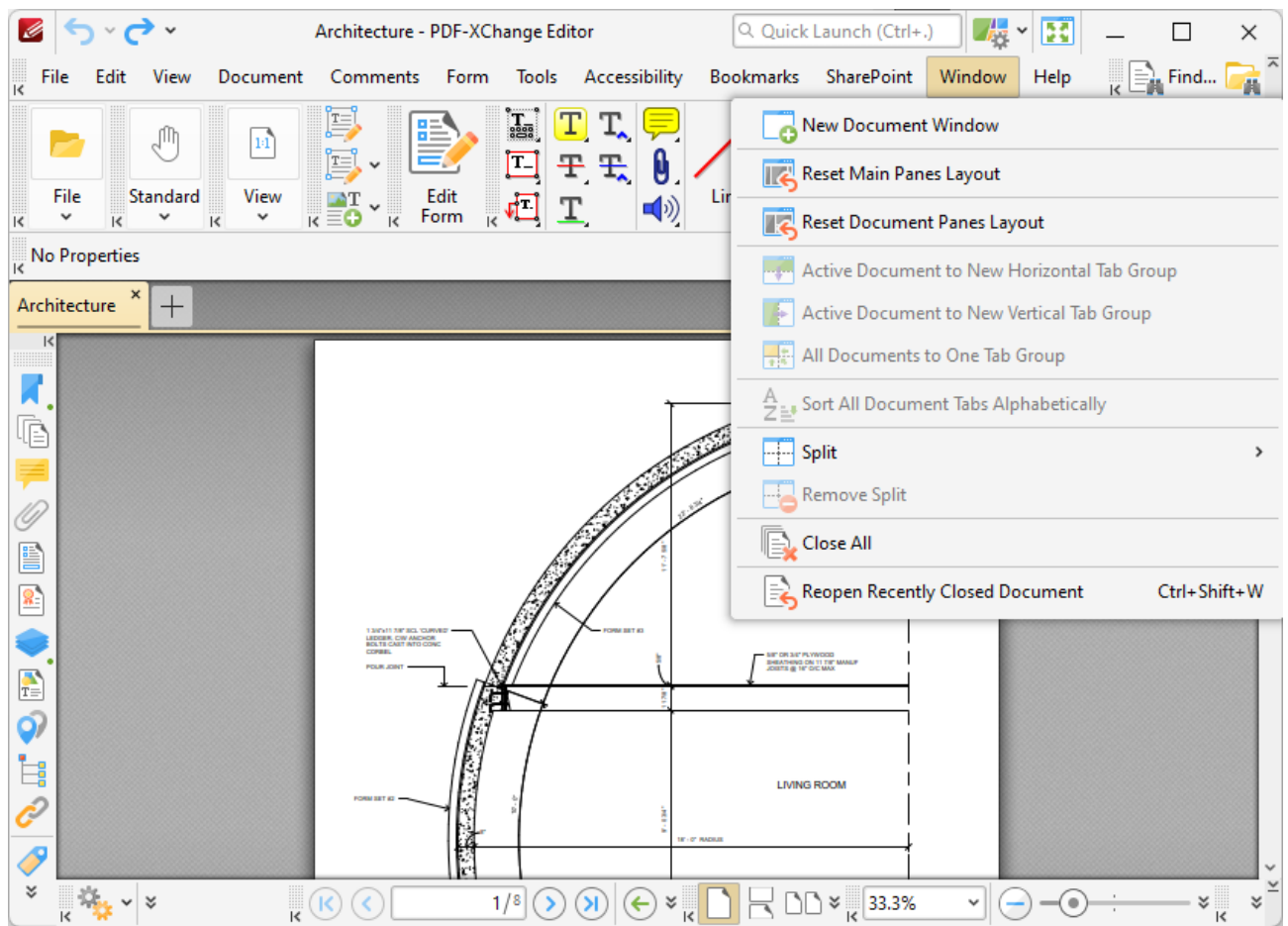
Figure 1. Window Tab Submenu

These settings are used to manipulate the main window in **PDF-XChange Editor:**

- Click **New Document Window** to open a duplicate of the active document in a new window.

- Click **Reset Main Panes Layout** to revert the layout of the main panes to their default format. The main panes are the **Properties Pane,** 213 **Search Pane,** 217 **Stamps Palette** 943 and **Comment Styles Palette.** 791
- Click **Reset Document Panes Layout** to revert the layout of the document panes to their default format. The **Document Panes** are the **Bookmarks Pane,** 504 **Thumbnails Pane,** 510 **Destinations Pane,** 553 **Content** 548 **Pane,** 548 **Signatures Pane,** 532 **Layers Pane,** 535 **Comments Pane,** 519 **Attachments Pane** 524 and **Fields Pane.** 527
- Click **Active Document to New Horizontal Tab Group** to move the active document to a new horizontal tab group.
- Click **Active Document to New Vertical Tab Group** to move the active document to a new vertical tab group.
- Click **All Documents to One Tab Group** to move all open documents to a single tab group.
- Click **Split** to split the view of the active document. This is a useful feature for editing purposes - for example it is possible to view the same document at different levels of zoom while editing.
  - Click **Horizontal Split** to split the document view horizontally into two sections
  - Click **Vertical Split** to split the document view vertically into two sections
  - Click **Spreadsheet Split** to split the document view into four equal sections.
  - Note that when this option is enabled, the **Split** icon displays a check mark in the dropdown menu. Click **Split** in the dropdown menu to disable the split.
- Click **Remove Split** to disable the **Split** feature detailed above.
- Click **Close All** to close all open documents.
- Click **Reopen Recently Closed Document** (or press Ctrl+Shift+W) to open recently closed documents.

5.12 Help

Help

Hover over **Help** to open the following submenu:
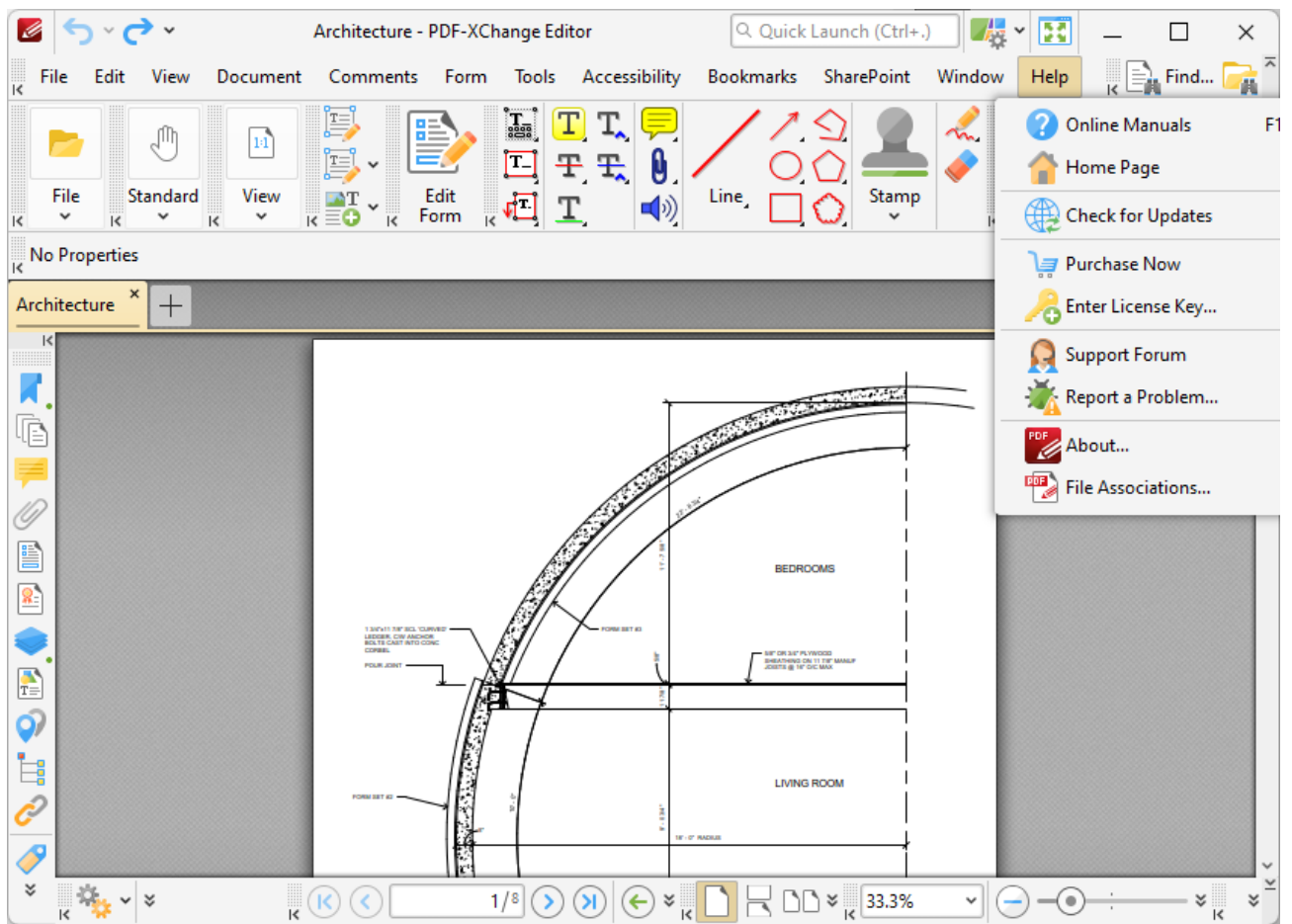
Figure 1. Help Tab Submenu

- Click **Online Manuals** (or press F1) to launch the **PDF-XChange Editor** online manual.
- Click **Home Page** to launch the home page of the **PDF-XChange** website.
- Click **Check for Updates** to check for updates to the **PDF-XChange** family of products.

- Click **Enter License Key** to add/edit/view license keys for **PDF-XChange Editor.** The **Preferences** dialog box will open. The process of adding license keys is detailed **here.** [244]
- Click **Support Forum** to launch the **PDF-XChange** support forums.
- Click **Report a Problem** to report bugs and other issues to **PDF-XChange,** as detailed below.
- Click **About** to view further details about **PDF-XChange Editor.**
- Click **File Associations** to view/edit file associations for **PDF-XChange Editor,** as detailed **here.** [258]
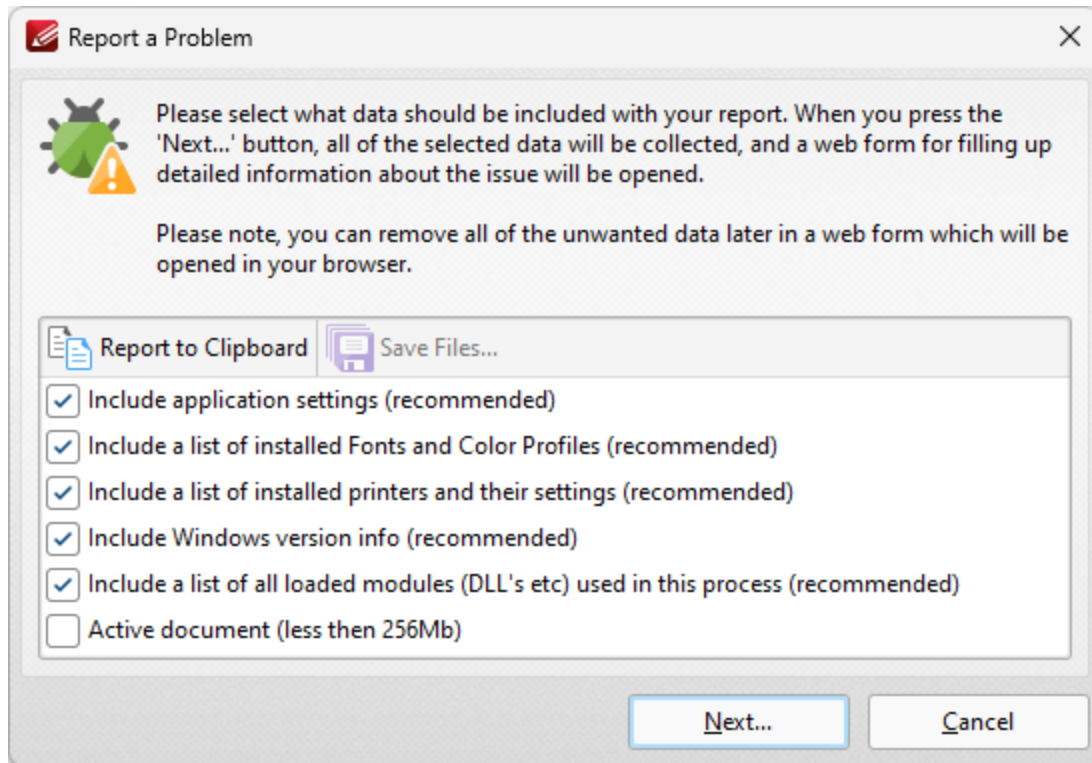
Figure 2. Report a Problem Dialog Box

Select the check boxes to determine the information included in the report. If you want to review the information then click **Report to Clipboard** to copy the report to your clipboard. When you have selected all the required check boxes, click **Next** to open the bug report webform, then fill out the form and send it to **PDF-XChange** for review.

6   Appendix

Appendix

This section details additional information about settings and functions in **PDF-XChange Editor:**

- **Accessibility Check** [1102] - details the accessibility rules that are checked when documents are assessed for accessibility.
- **Alt Shortcuts** [1105] - details how to use **Alt** shortcuts to navigate the user interface.
- **Blend Mode** [1107] - information about the blend modes and how they operate.
- **Command Line Options** [1109] - a list of the available command line options, which includes definitions and sample command lines.
- **Changing the Layout of Panes** [1127] - an explanation of how to edit the panes in **PDF-XChange Editor.**
- **Converting Files to PDF** [1134] - details the available options for converting a range of file formats to PDF.
- **Date Format Specification** [1124] - an explanation of how to specify date formats.
- **Document Tab Options** [1136] - an explanation of the options in the right-click document tab shortcut menu.
- **Editing Document Pages** [1138] - a breakdown of the methods through which **PDF-XChange Editor** can be used to edit document pages.
- **Features Added in Version 10** [1139] - details all features added in version 10 of **PDF-XChange Editor.**
- **Keyboard Shortcuts** [1141] - a comprehensive list of keyboard shortcuts, and instructions on how to view/edit them in the software.
- **Macros** [1157] - an explanation macros and macro-enabled operations.
- **Page Boxes** [1271] - an explanation about the use of crop boxes in PDF documents and **PDF-XChange Editor.**
- **Page Range Settings** [1274] - a guide to the correct format for the specification of page ranges.
- **Read Out Loud Feature** [1275] - an explanation of this feature.
- **Removing Trial Watermarks** [1277] - an explanation of how to remove trial watermarks after a license has been purchased.

- **Removing Activations from a License** ⬜ 1283 - an explanation of how to remove an activation from your license, in order to free up a space for a new machine.
- **Shell Extensions** ⬜ 1285 - an explanation of the shell extensions and **ifilter** search tool.
- **Text Editing Options** ⬜ 1288 - an explanation of text-editing options for the **PDF-XChange Editor** tools.
- **Tool Content Options** ⬜ 1120 - an explanation of editing options for content created with the **PDF-XChange Editor** tools.
- **Tool Properties** ⬜ 1292 - a table that defines all available properties for the **PDF-XChange Editor** tools.

6.1   Accessibility Check

Accessibility Check

The **Accessibility Check** feature in **PDF-XChange Editor** enables you to verify whether documents conforms to international accessibility standards. Conformance with these standards ensures accessibility for people with disabilities who use technology such as screen readers, screen magnifiers and other equipment to navigate and read electronic content. The **Accessibility Check** contains thirty-two rules that are used to determine the accessibility of documents. They concern specific elements of documents and are therefore grouped into the following categories:

Document

- **Accessibility Permission Flag** reports the need to enable the security settings that permit accessibility. This is because some documents contain permission settings that prevent them from being copied, edited, printed, extracted and/or annotated. These settings may interfere with a screen reader's ability to read the document, because screen readers must be able to copy or extract document text in order to read it to the user. The **Accessibility Permission Flag** reports whether or not it is necessary to turn on the security settings that allow accessibility for the screen reader.
- **Image-Only PDF** reports that documents contains only inaccessible, non-text content such as images. (Note that some images may be of text - in those cases, if the document does not contain fonts, then the text will not be recognized).
- **Tagged PDF** reports whether documents contain tags that specify the order in which document content should be read.
- **Logical Reading Order** must be checked manually and is included to ensure that the reading order in the **Tagged** panel follows the logical reading order of the document.
- **Document Language** reports whether the primary text language of documents is specified, and allows some screen readers to switch to the specified language.
- **Title** reports the title of documents as detailed in their document properties.
- **Bookmarks** reports whether documents that contain twenty-one or more pages also have bookmarks that match the document structure.
- **Color Contrast** reports whether documents are sufficiently accessible for colorblind users.

Page Content

- **Tagged Content** reports the status of document content, which must be either tagged or marked as an artifact (such as graphics or decorative images) in order to conform to accessibility standards.
- **Tagged Annotations** reports the status of annotations in documents. Annotations must be either tagged or marked as artifacts to satisfy this rule.
- **Tab Order** reports whether the tab order of documents matches the document structure.
- **Character Encoding** reports whether documents contain the encoding required to display the fonts that they contain.
- **Tagged Multimedia** reports the status of document multimedia objects, which must be either tagged or marked as artifacts in order to conform to accessibility standards.
- **Screen Flicker** reports whether documents contain content that causes the screen to flicker. This type of content can be difficult to see when the screen is magnified and can cause seizures in people who have photosensitive epilepsy.
- **Scripts** reports whether documents contain scripts that interfere with keyboard navigation or prevent the use of input devices. Document content and functionality must not be script-dependent unless it is accessible to assisting technology.
- **Timed Responses** reports whether documents contain forms with JavaScript that require a response from users within a specified time frame.
- **Accessible Links** reports whether the URLs in documents are tagged correctly, as well as whether there are several identical links within the same document. URLs must be active and correctly tagged in order to be accessible to screen readers.

Forms

- **Tagged Form Fields** reports whether all document form fields are tagged.
- **Field Descriptions** reports whether all form fields contain a text description, which is requirement for accessible documents.

Alternate Text

- **Figures Alternate Text** reports whether document images either have alternate text or are marked as artifacts. All document images must fall into these categories in order to conform to accessibility standards.
- **Nested Alternate Text** reports whether documents contain nested alternate text, which screen readers do not read.
- **Associated with Content** reports whether alternate text is associated with page content. This rule is necessary because in cases where document elements have alternate text but do not contain page content it is not possible to determine the document page with which the alternate text is associated.
- **Hides Annotation** reports whether alternate text hides annotations, because screen readers are unable to read annotations in cases where they are nested under a parent element that has alternate text.

- **Other Elements Alternate Text** reports whether documents contain content (other than figures) that require alternate text, such as 3D models, annotations and multimedia.

Tables

Please note that the structure of tables is often complex, and therefore it is advised that a manual check is performed in order to ensure that tables conform to accessibility standards.

- **Rows** reports whether each table row is a child of **Table, THead, TBody,** or **TFoot.**
- **TH and TD** reports whether **TH** and **TD** are children of **TR.**
- **Headers** reports whether tables have headers, as this is necessary for tables to conform to accessibility standards.
- **Regularity** reports whether tables contain the same number of columns in each row, and rows in each column - both of which are necessary in order to conform to accessibility standards.
- **Summary** reports whether tables have a table summary. Table summaries are not required for documents in order to conform to accessibility standards,

Lists

- **List Items** reports whether each list item is a child of a list. List elements must contain list item elements, and list item elements must contain only label elements and list item body elements, in order to conform to accessibility standards.
- **Lbl and LBody** is identical to **List Items.**

Headings

- **Appropriate Nesting** reports whether headings are nested correctly.

6.2   Alt Shortcuts

Alt Shortcuts

The **Alt** shortcuts can be used to navigate the user interface with the keyboard in **PDF-XChange Editor.** Press and hold the **Alt** key on your keyboard to view available **Alt** shortcuts:
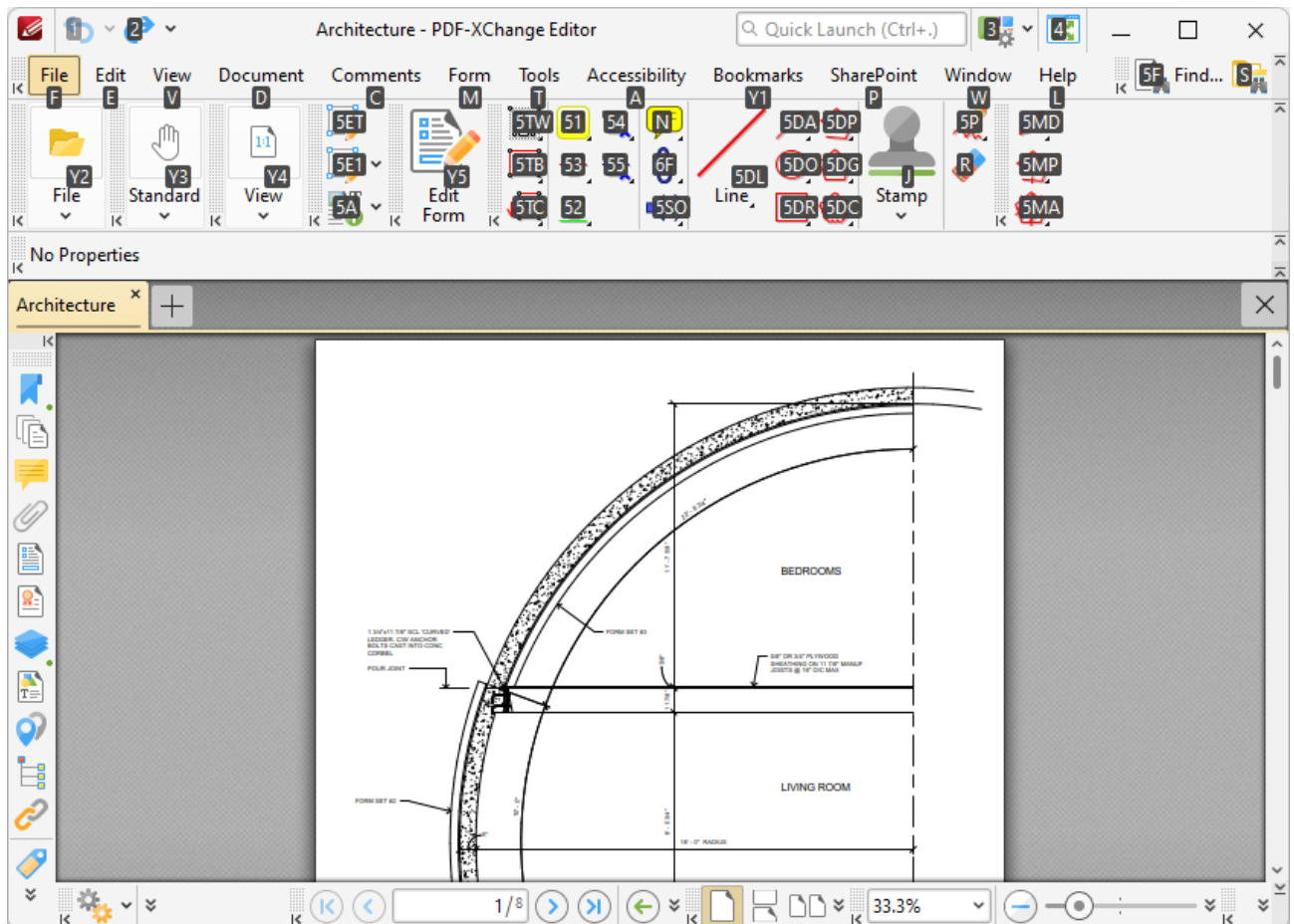
Figure 1. Alt Shortcuts Enabled

When **Alt** shortcuts have been enabled, press the corresponding letter/number on the keyboard to open the associated menu in the user interface.

6.3   Blend Mode

 Blend Mode

The **Blend Mode** property is available for document content and many of the annotation features in **PDF-XChange Editor.** It appears in the **Properties Toolbar** [485] when objects that feature it are selected, and can also be viewed/edited in the **Properties** [213] pane. **Blend Mode** determines how content blends with overlapping content. The **Fill Color** property is referenced when **Blend Modes** are used, and this can be edited in the **Properties Toolbar** or the **Properties** pane:
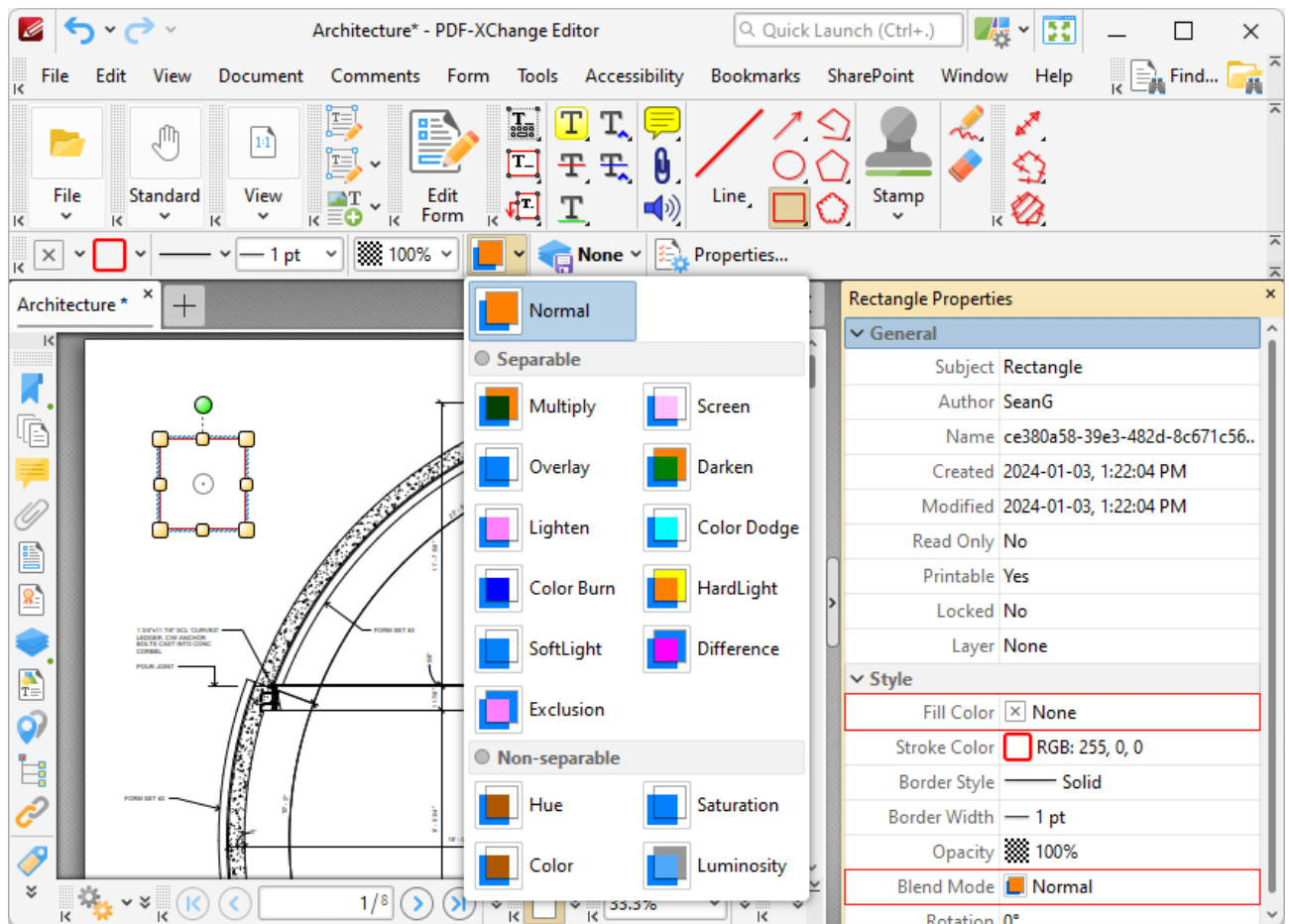
Figure 1. Blend Mode Options

- **Normal** maintains the selected **Fill Color**.
- **Multiply** multiples the **Fill Color** value with the color value of the underlying content. Resultant colors are at least as dark as one of the source colors.
- **Screen** multiplies the complements of the **Fill Color** value with the color value of underlying content and then complements the result. The resulting color will be at least as light as one of the source colors.
- **Overlay** either multiplies or screens the **Fill Color** value with the color value of underlying content, depending on the color value of the latter. The **Fill Color** will overlay the underlying content while preserving its highlights and shadows. The color of underlying content will be blended with the **Fill Color** to reflect its shade.
- **Darken** selects the darker of the **Fill Color** value and the color value of underlying content.
- **Lighten** selects the lighter of the **Fill Color** value and the color value of underlying content.
- **Color Dodge** brightens the color of the underlying content to reflect the **Fill Color**. Note that if black is used as the **Fill Color** then there will be no effect.
- **Color Burn** darkens the color of the underlying content to reflect the **Fill Color**. Note that if white is used as the **Fill Color** then there will be no effect.
- **Hardlight** either multiples or screens the **Fill Color** value with the color value of underlying content, depending on the **Fill Color** value. This creates the effect of shining a strong spotlight on the underlying color.
- **Softlight** either darkens or lightens colors, depending on the **Fill Color** value. This creates the effect of shining a diffused spotlight on the underlying color.
- **Difference** subtracts the darker of the constituent colors from the lighter color.
- **Exclusion** performs a less contrasted version of the **Difference** option.
- **Hue** combines the **Fill Color** value with the saturation and luminosity of the color value of the underlying content.
- **Saturation** combines the saturation of the **Fill Color** with the hue and luminosity color value of the underlying content.
- **Color** combines the the hue and saturation of the **Fill Color** with the luminosity color value of the underlying content.
- **Luminosity** combines the luminosity of the **Fill Color** with the hue and saturation of the color value of the underlying content.

Note that the **Arrange** options can be used to change the layer order of overlapping content, which has a direct effect on the **Blend Mode.** Those options are detailed **here.** [829]

6.4   Command Line Options

Command Line Options

The command line options detailed below are available in **PDF-XChange Editor.** Please note:

- If any values have spaces, backslashes or forwardslashes then the entire options list should be enclosed in quotation marks.
- If the **optionslistfile** contains spaces then it should be enclosed in quotation marks.
- If a profile is specified then changes will be made to that profile. If a profile is not specified then the changes will apply only 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.
- Use semicolons to delimiter options when more than one option is being used.

Formal Syntax

<anytext> means any text string.

<a>|<b> means <a> *or* <b>.

[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"

<filename> means 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. See **here** ⌐1274 for further information on the specification of page ranges.

Command Line Options

/addlang

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. The format of the file will be .xclpack. See **here** for a list of available language packs for **PDF-XChange Editor.**

Syntax

/addlang[:[mode=]ask|user|all]] <filename>

Parameters

- **mode=ask** – asks user about installing mode: "for this user only" or "for all users on this machine". This is the default mode.
- **mode=user** – installs new UI-languages silently, for only the current user.
- **mode=all** – installs new UI-languages silently, for all users on the target machine.

Please note that system administrator privileges are required when making changes that affect all users.

Example

PDFXEdit.exe /addlang:mode=user "c:\Users\John\Downloads\German.xclpack"

/close

This command closes open documents according to the specified source file name.

Syntax

/close[:[mode=]save|discard|ask]

Parameters

- **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.
- **mode=save** – if the document has been edited then the software saves changes silently before closing.

Examples

PDFXEdit.exe /close "c:\example.pdf"
PDFXEdit.exe /close:mode=save "c:\example.pdf"
PDFXEdit.exe /close:discard "c:\example.pdf"

/exportp

This command 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.

Syntax

/exportp <filename>

Parameters

There are no available parameters for this command.

Example

PDFXEdit.exe /exportp "c:\PXCEditor.MySettings.Backup.dat"

/exportsettings

This command exports settings of the application to a file on the local computer. This operation can also be achieved via the **Export Settings** feature.

Syntax

/exportsettings[:<parameters>] <filename>

Parameters

Note that all parameters support the values **yes, no, 1, 0, true** and **false.**

- **common** - exports common program options (but does not include presets lists, trusted/untrusted locations and names or places). The default value is **true**.
- **presets** - exports the preset lists of the application, such as color management and scanner presets. The default value is **true**.
- **trustedlist** - exports the list of the trusted/untrusted locations and names. The default value is **true**.
- **places** - exports the list of places (user-defined locations that are used to open files, such as **Dropbox** folders). The default value is **true**.
- **history** - exports the list of recently opened files. The default value is **true**.
- **stamps** - exports all custom stamps collections. The default value is **false**.
- **dsatemplates** - exports the digital signature appearance templates. The default value is **false**.
- **pluginsdata** - exports the advanced plugins data. The default value is **false**.
- **signatures** - exports the list of signatures and initials. The default value is **false**.
- **all** - exports all settings. Note that this command line option can be customized using any of the available parameters. For example, **"/exportsettings:all=yes;stamps=0"** exports all settings except stamps, and **"/exportsettings:all=no;stamps=1"** exports only stamps. This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.
- **settings** - exports all application settings **(common, presets, trustedlist** and **places).** This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.

Examples

PDFXEdit.exe /exportsettings "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /exportsettings:history=no "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /exportsettings:history=no;stamps=yes;pluginsdata=yes "c:\PDFXChangeEditorSettings.xces"

/fileassoc

This command determines the file associations for **PDF-XChange Editor.**

Syntax

/fileassoc[:user=no|yes]

Parameters

- **user=no** - then file associations will be placed in **HKEY_ LOCAL_MACHINE.**
- **user=yes** - then file associations will be placed in **HKEY_CURRENT_USER** and **HKEY_ LOCAL_MACHINE.**

Example

PDFXEdit.exe /fileassoc:user=yes

/importp

This command launches **PDF-XChange Editor** 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.

Syntax

/importp <filename>

Parameters

There are no available parameters for this command.

Example

PDFXEdit.exe /importp "c:\PXCEditor.MySettings.dat"

/importsettings

This command imports all settings from a file created by the **/exportsettings** command, or by the **Export Settings** 222 feature. This operation can also be achieved via the **Import Settings** 224 feature.

Syntax

/importsettings[:<parameters>] <filename>

Parameters

Note that all parameters support the values **yes, no, 1, 0, true** and **false.**

- **common** - imports common application options (but does not include the presets lists, trusted/untrusted locations and names or places). The default value is **true**.
- **presets** - imports the application presets lists, such as color management and scanner presets. The default value is **true**.
- **trustedlist** - imports the list of trusted/untrusted locations and names. The default value is **true**.
- **places -** imports the list of places (user-defined locations that are used to open files, such as **Dropbox** folders). The default value is **true**.
- **history** - imports the list of recently opened files. The default value is **true**. The value **merge** can be used to combine the existing history with the imported history.
- **stamps** - imports all custom stamps collections. The default value is **true**.
- **dsatemplates** - imports the digital signature appearance templates. The default value is **true**.
- **pluginsdata** – imports advanced plugins data. The default value is **true**.
- **signatures** - imports the list of signatures and initials. The default value is **true**.
- **all** - imports all settings. Note that this command line option can be customized using any of the available parameters. For example, **"/importsettings:all=yes;stamps=0"** imports all settings except stamps, and **"/importsettings:all=no;stamps=1"** imports only stamps. This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.
- **settings** - imports all application settings **(common, presets, trustedlist** and **places).** This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.

Examples

PDFXEdit.exe /importsettings "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /importsettings:history=merge "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /importsettings:history=merge;stamps=yes;settings=no "c:\PDFXChangeEditorSettings.xces"

/open - please note that **/A** can also be used for this command.

This command opens documents from a specified file and determines the custom view location, search words and highlight rectangles as necessary.

Syntax

/A <param1>=<value1>[;<param2>=<value2>[;...]] [=OpenParameters] <filename>

Parameters

- **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|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** pane 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).

Examples

PDFXEdit.exe /A zoom=1000 "c:\example.pdf"
PDFXEdit.exe /A page=255;zoom=200;pagemode=thumbs;search="lazy dog" "c:
\example.pdf"

/print

This command prints pages from specified documents.

Syntax

/print[:[default[=yes|no]][;showui[=yes|no [;printer=<printername>]
[;pages=<pagesrange>]] <filename1> [<filename2> ... <filenameN>]

Parameters

- **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 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.

Example

PDFXEdit.exe /print:default=yes;showui=yes;printer="PDF-XChange Printer" "c:
\example.pdf"

/resetsettings

This command resets the settings for **PDF-XChange Editor** on the local computer.

Syntax

/resetsettings[:<parameters>]

Parameters

Note that all parameters support the values **yes, no, 1, 0, true** and **false.**

- **common** - resets common application options (but does not include the presets lists, trusted/untrusted locations and names or places). The default value is **true**.
- **presets** - resets the application presets lists, such as color management and scanner presets. The default value is **true**.
- **trustedlist** - resets the list of trusted/untrusted locations and names. The default value is **true**.
- **places -** resets the list of places (user-defined locations that are used to open files, such as **Dropbox** folders). The default value is **true**.
- **prompts** - resets prompts and warning messages (the "do not show this message again" dialog boxes). The default value is **false**.
- **uilang** - resets the language of the user interface. The default value is **false**.
- **history** - resets the list of recently opened files. The default value is **true**.
- **stamps** - resets all custom stamps collections. The default value is **true**.
- **dsatemplates** - resets the digital signature appearance templates. The default value is **true**.
- **pluginsdata** – resets advanced plugins data. The default value is **false.**
- **signatures** - resets the list of signatures and initials. The default value is **false.**
- **all** - resets all settings. Note that this command line option can be customized using any of the available parameters. For example, **"/resetsettings:all=yes;stamps=0"** resets all settings except stamps, and **"/resetsettings:all=no;stamps=1"** resets only stamps. This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.
- **settings** - resets all application settings **(common, presets, trustedlist, places, UILang** and **history).** This command line does not have a default value because it is a combined option, but each option has its own default value, as detailed above.

Examples

PDFXEdit.exe /resetsettings "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /resetsettings:history=merge "c:\PDFXChangeEditorSettings.xces"
PDFXEdit.exe /resetsettings:history=merge;stamps=yes;settings=no "c:\PDFXChangeEditorSettings.xces"

/runjs

This command launches JavaScript.

Syntax

/runjs[:log[=yes|no]] <scriptfilename> [<filename1> ... <filenameN>]

Parameters

- **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 file that contains the JavaScript.

Example

The following command line launches the JavaScript contained in the file "AddDraftStamp.js":

PDFXEdit.exe /runjs "c:\AddDraftStamp.js" "c:\example.pdf"

/usep

This command instructs the application to use the input file as the source for all settings.

Syntax

/usep[:readonly[=yes|no]] <filename>

Parameters

- **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.

Example

PDFXEdit.exe /usep:readonly "c:\PXCEditor.MySettings.dat"

/webassoc

This command determines the mime type (web browser) associations for **PDF-XChange Editor.**

Syntax

/webassoc[:user=no|yes]

Parameters

- **user=no** - then mime type associations will be placed in **HKEY_ LOCAL_MACHINE.**

- **user=yes** - then mime type associations will be placed in **HKEY_CURRENT_USER** and **HKEY_LOCAL_MACHINE.**

Example

> **PDFXEdit.exe /webassoc:user=yes**

6.5   Comments Shortcut Menu

Comments Shortcut Menu

A range of options are available for editing and interacting with comments in their right-click shortcut menu. The options available depend on the type of comment selected. Right-click comments to view the options available, as detailed below:
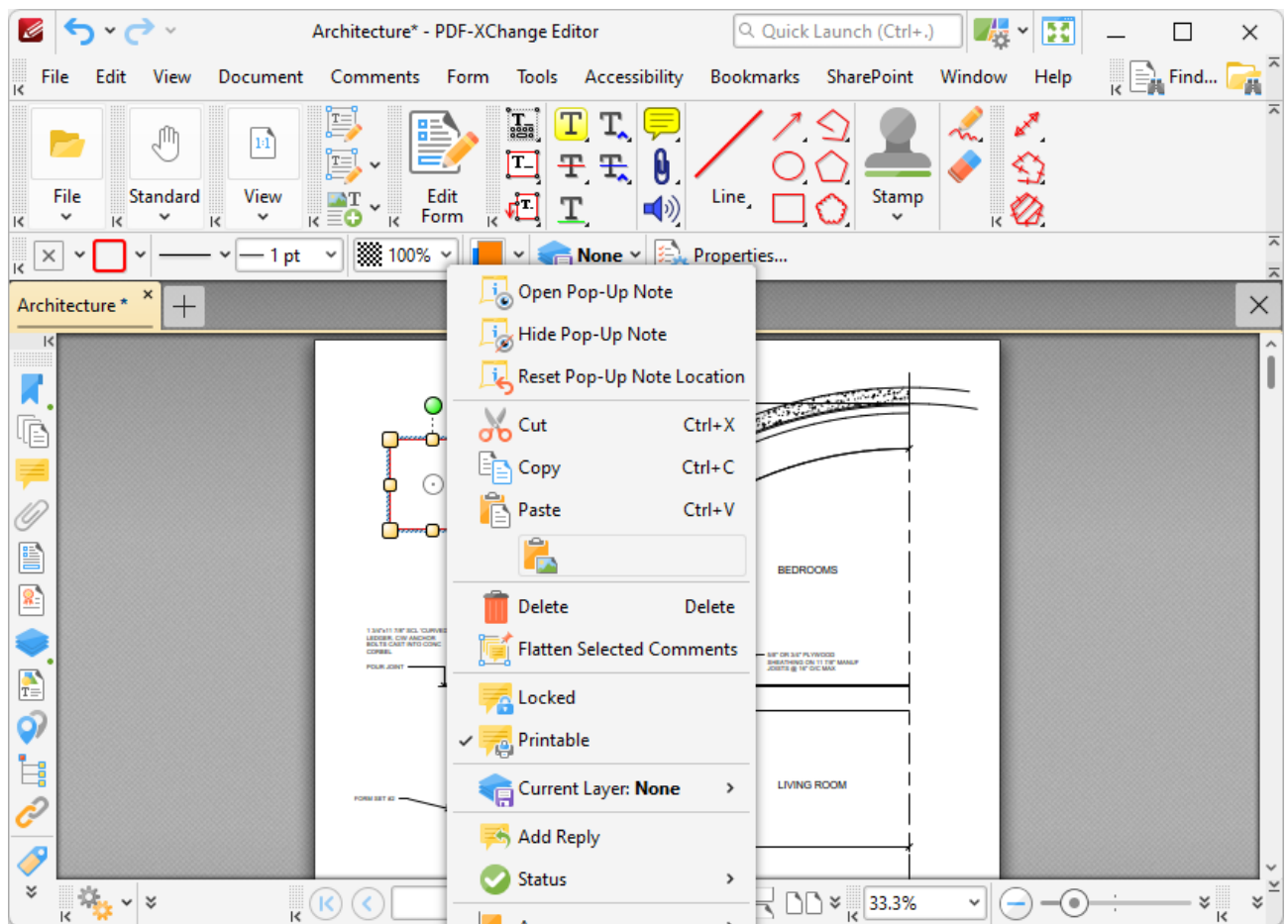

Figure 1. Tool Content Right-Click Menu

- The list below details all editing options available for tool content:

- Click **Open Pop-Up Note** to view the content pop-up note. Pop-up notes are created automatically when content is created. (Note that in the case of the **Measuring Tools** |969| it is necessary to use the **Edit Label** and **Delete Label** options, detailed below, to edit/delete note content). Highlight note content and then use the options in the **Properties Toolbar** |1288| to edit its appearance.
- Click **Hide Pop-Up Note** to close the view/edit pane of content pop-up notes.
- Click **Reset Pop-Up Note Location** to reset the location of content pop-up notes.
- Click **Cut, Copy, Paste** or **Delete** to perform these operations on selected content.
- Click **Flatten Selected Comments** to flatten selected comments to the base content layer of documents.
- Click **Locked** to enable/disable the locked property of comments. If this property is enabled then the comment cannot be deleted and its properties (including its position and size) cannot be modified by users.
- Click **Printable** to enable/disable the printable property of comments. If this property is enabled then the comment is printed with the document. If this property is not enabled then the comment is not printed.
- **Current Layer** displays the current layer to which content belongs. Hover over this option to view a list of all layers in the document. Click a layer to move the content there, or click **New Layer** to move the content to a new layer. Further information about layers and layer creation is available **here.** |535|
- Click **Fit Box by Text Content** to fit the size of the selected box to the text that it contains. This feature is available for the **Text Box, Callout** and **Typewriter** tools.
- Click **Add Reply** to add replies to existing pop-up notes.
- Select an option from the **Status** submenu to define the status of content for subsequent editing. The options are **Accepted, Cancelled, Completed** and **Rejected.**
- Use the **Arrange** submenu arrange/edit selected content:
  - Click the **Align** options to align selected content items.
  - Click **Rotate 90° CCW, Rotate 90° CW** or **Rotate 180°** to rotate selected content.
  - Click **Flip Horizontal/Vertical** to flip selected content horizontally/vertically.
  - Click **Transform** to edit the position and/or size of selected content as detailed **here.** |205|
  - Click **Duplicate** to duplicate selected content as detailed **here.** |207|
  - Click **Bring Forward** to bring selected content items forward one step in cases of multiple objects overlapping.
  - Click **Send Backward** to send selected content back one step in cases of multiple objects overlapping.
  - Click **Bring to Front** to bring selected content to the front in cases of multiple objects overlapping.
  - Click **Send to Back** to send selected content to the back in cases of multiple objects overlapping.
- Use the **Set Scale** submenu to select a scale for selected content:
  - Click a scale to select a predefined scale from the list.

- Click **Manage Measurements** to view/edit the list of predefined scales. Use **Delete** and **Edit** buttons to delete/edit selected scales. Use the **Clone** button to clone predefined scales. Cloned scales can be edited and saved for subsequent use.
- Click **Calibrate Measurement** to create a new scale as detailed **here.** 986

- Click **Export Measurements To CSV File** to export output of the **Measuring Tools** 969 to a comma-separated-values file. Note that when documents that contain perimeter or area annotations are exported to comma-separated-values, the output document will contain an **"Alt. Value"** column for annotations. This value details the area of perimeter annotations and the perimeter of area annotations.
- The **Restore Caption Placement** feature will be added in a future build.
- Click **Edit Label** to edit the pop-up note of selected content. Please note that it is not possible to remove the scale reference figure that the **Measuring Tools** 969 create.
- Click **Delete Label** to delete information that has been added to the label. Please note that it is not possible to remove the scale reference figure that the **Distance Tools** create.
- Click **Deselect** to deselected selected content.
- Use the **Control Points** submenu to add/delete control points as desired:
  - Click **Add Point** to add new control points.
  - Right-click control points and then select **Delete Point** to delete points.
- The **Auto Adjust Arm Position** option is used in conjunction with the callout arm of the **Callout Tool.** When this setting is enabled the control point from which callout arms originate changes automatically. The control point closest to the end of the callout arm is used. When this setting is disabled the control point from which the callout arm originates remains constant when callout text boxes are repositioned.
- Click **Flip Line** to flip content through one hundred and eighty degrees.
- Click **Convert to Measurement** to convert selected annotations into measurement annotations.
- Click **Convert to Polyline** to convert line or distance annotations into polyline annotations.
- Click **Convert to Lines** to convert polygon, polyline, perimeter, area or rectnagle annotations into line annotations.
- Click **Transform to Quadrilateral** to enable link shape editing when using the **Link Tool** or the **Redaction** feature. Click and drag the inner control points to edit the shape. When this option is enabled it is replaced in the submenu with the option to **Transform to Rectangle.** Click this option to revert to the default mode. Selected links will update automatically. Please note that the **Add/Edit Link Tool** 989 must be selected in order to edit/delete links.
- Click **Style Tools** to view style options for selected content:
  - Click **Copy Comment Style** to copy the style properties of selected content, such as the **Fill Color, Border Style** and **Opacity** value. (Use the **Properties** 604 pane to view/edit content properties).
  - Click **Apply Copied Comment Style** to apply copied comment and text properties to selected content.
  - Click **Apply Copied Comment Appearance** to apply copied comment properties to selected content.
  - Click **Apply Copied Text Style** to apply copied text styles to selected text. Right-click selected text to copy text styles, as detailed **here.** 1288

- Click **Make Current Properties Default** to set the properties of selected content as the default properties for subsequent content of the same format.
- Click **Apply Default Properties** to apply default content properties to selected content.
- Click **Make Current Text Format Default** to set the current text properties as the default text properties for the selected annotation format.
- Click **Apply Default Text Format** to apply the default text format to selected text. Note that each annotation format has a different default text format.
- Click **Export** to view export options for selected content. Available options depends on the format of selected content. All options are detailed below:
  - Click **Export selection to Microsoft Word Document** to export selected content to **(*.docx)** format.
  - Click **Export selection to Microsoft Excel** to export selected content to **(*.xlsx)** format.
  - Click **Export selection to Microsoft Powerpoint Presentation** to export selected content to **(*.pptx)** format.
- Click **Properties** to view/edit content properties in the **Properties** pane, as detailed **here.** 604

Note that the **Comment Styles Palette** 791 is a useful resource that can be used to view/edit comment style properties.

6.6   Date Format Specification

Date Format Specification

Several of the features in **PDF-XChange Editor** utilize an option to specify the date and/or time format to be used. These features use both predefined and custom dates/times. The following options are available:

Date Format Pictures

DATE FORMAT	DEFINITION
d	Day of the month as digits and without leading zeros for single-digit days.
dd	Day of the month as digits and with leading zeros for single-digit days.
ddd	Abbreviated day of the week. For example, "Mon" in English (United States).
dddd	Day of the week.
M	Month of the year as digits and without leading zeros for single-digit months.
MM	Month of the year as digits and with leading zeros for single-digit months.
MMM	Abbreviated month of the year, for example, "Nov" in English (United States).
MMMM	Month of the year, for example "November" for English (United States), and "Noviembre" for Spanish (Spain).
y	Year represented by only the last digit.

yy	Year represented by only the last two digits. A leading zero is added for single-digit years.
yyyy	Year represented by four or five digits, depending on the calendar used. Thai Buddhist and Korean calendars have five-digit years. The "yyyy" pattern shows five digits for these two calendars, and four digits for all other supported calendars. Calendars that have single-digit or two-digit years, such as for the Japanese Emperor era, are represented differently. A single-digit year is represented with a leading zero, for example, "03". A two-digit year is represented with two digits, for example, "13". No additional leading zeros are displayed.
yyyyy	Behaves identically to "yyyy".
g, gg	Period/era string. Note that these format pictures are ignored in date strings if there is no associated period/era string.

Please note that **PDF-XChange Editor** uses these elements to construct a null-terminated format picture string. If spaces are used to separate the elements in the input string then they will appear in the same location in the output string. The format types "d", "g", and "y" must be lowercase, and the letter "M" must be uppercase. **PDF-XChange Editor** uses single quotation marks to mark characters to display exactly as specified. If you need to display a single quotation mark in the output string then place two single quotation marks in a row in the input string. For example, 'abc''bar' is displayed as "abc'bar".

Hour, Minute, Second and Time Marker Format Pictures

DATE FORMAT	DEFINITION
h	Hour without leading zeros for single-digit hours (12-hour clock).
hh	Hour with leading zeros for single-digit hours (12-hour clock).
H	Hour without leading zeros for single-digit hours (24-hour clock).
HH	Hour with leading zeros for single-digit hours (24-hour clock).

m	Minute without leading zeros for single-digit minutes.
mm	Minute with leading zeros for single-digit minutes.
s	Second without leading zeros for single-digit seconds.
ss	Second with leading zeros for single-digit seconds.
t	One-character time marker string. Please note that this format is not recommended for use with some languages, such as Japanese (Japan).
tt	Multi-character time marker string.
Z	Time zone offset (from UTC) of current user.

Please note that **PDF-XChange Editor** uses these elements to construct a format picture string. Format pictures consist of a combination of one string of each of the hour, minute, second and time marker format types. The format types "m", "s", and "t" must be lowercase, and "h" must be lowercase to denote the 12-hour clock or uppercase ("H") to denote the 24-hour clock. **PDF-XChange Editor** uses single quotation marks to mark characters to display exactly as specified. If you need to display a single quotation mark in the output string then place two single quotation marks in a row in the input string. For example, 'abc''bar' is displayed as "abc'bar".

6.7 Changing the Layout of Panes

Changing the Layout of Panes

The size and location of all panes in **PDF-XChange Editor** can be customized as desired.

Editing Panes

The editing panes are listed in the **View** tab:
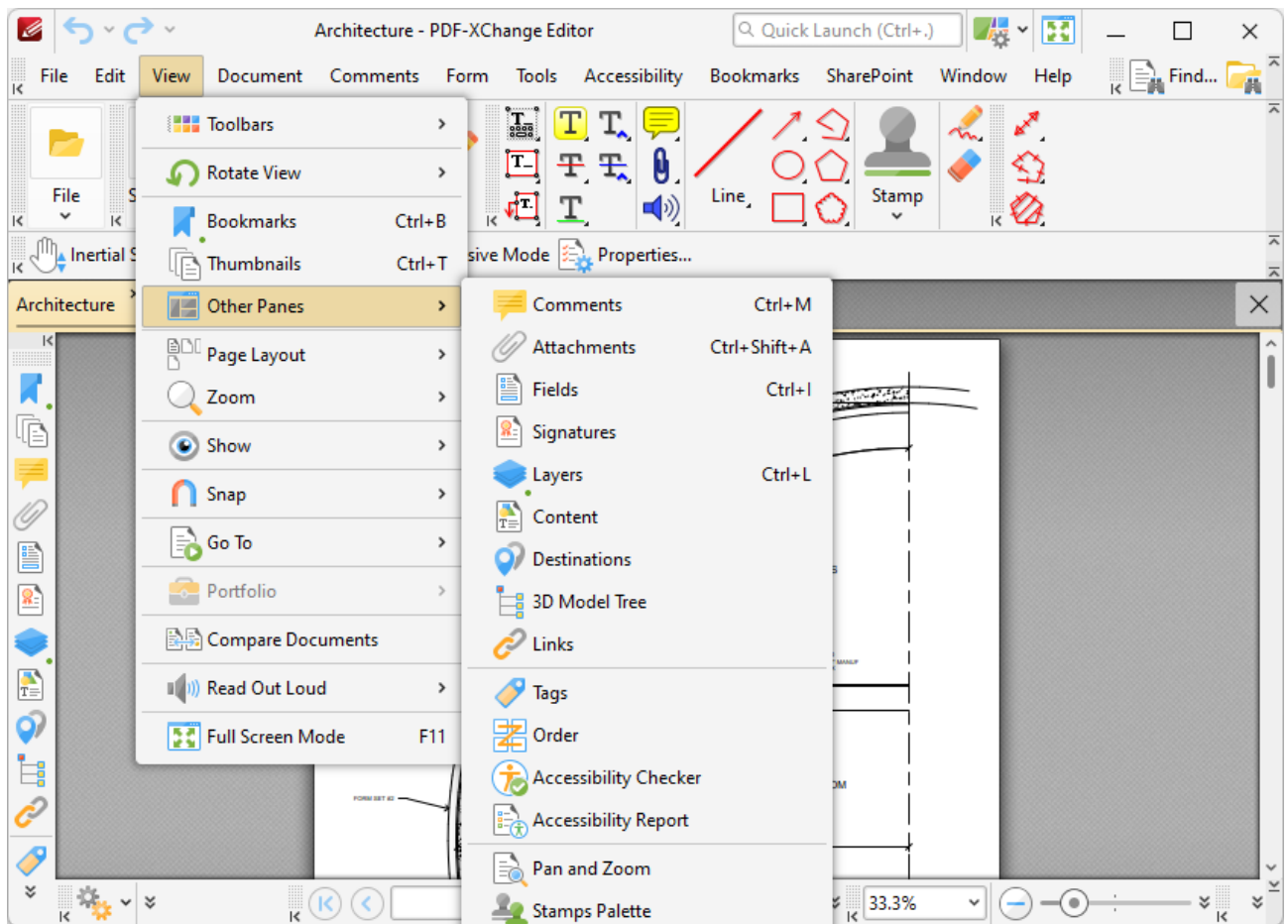
Figure 1. View Tab, Editing Panes

Click to open panes:
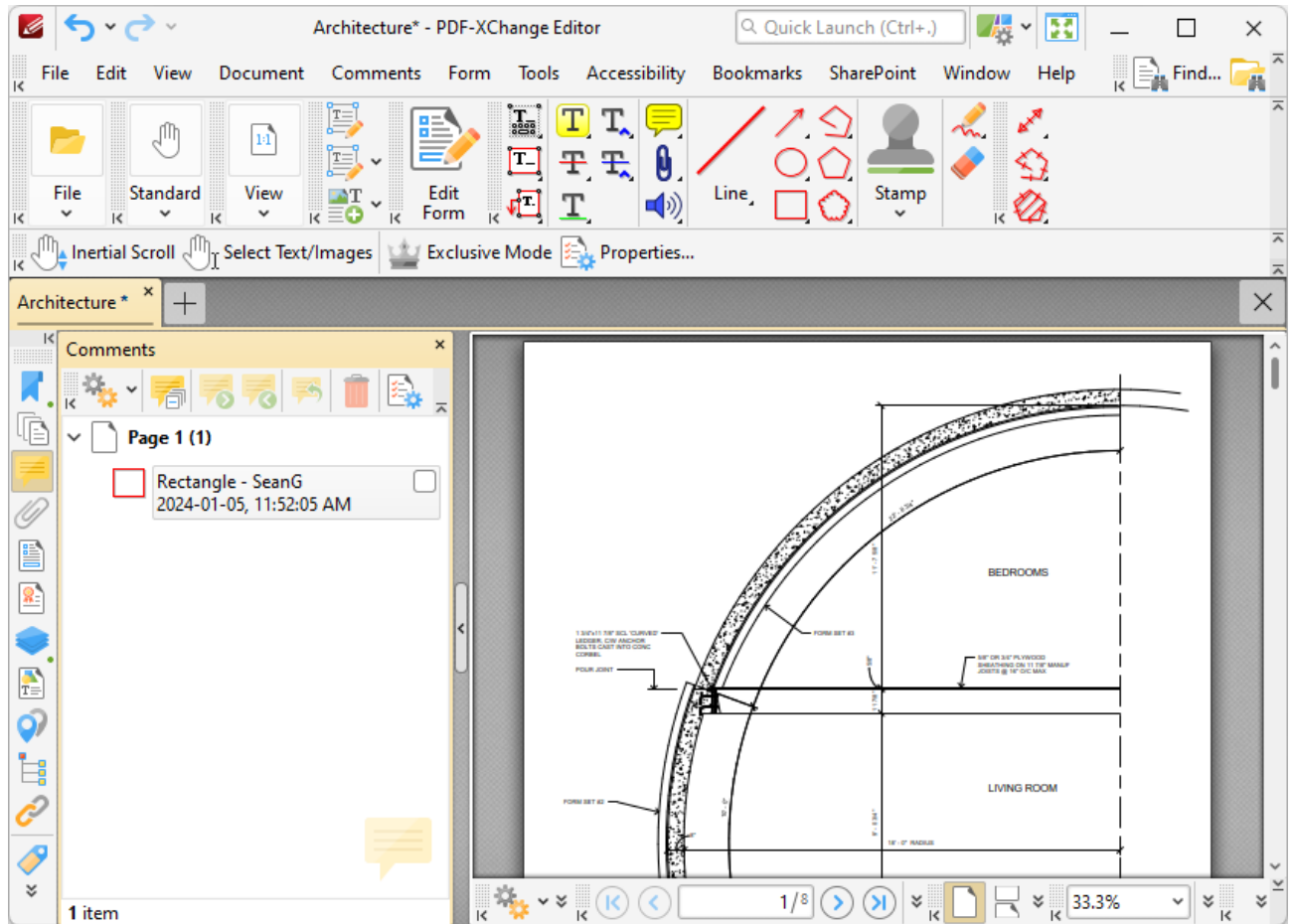
Figure 2. Thumbnails and Properties Panes Opened

Click and drag panes to undock them from the user interface, then move them to the desired location or to a new docking point. Available docking points will be displayed as detailed in **(figure 3).** Drag panes onto docking points to dock them:
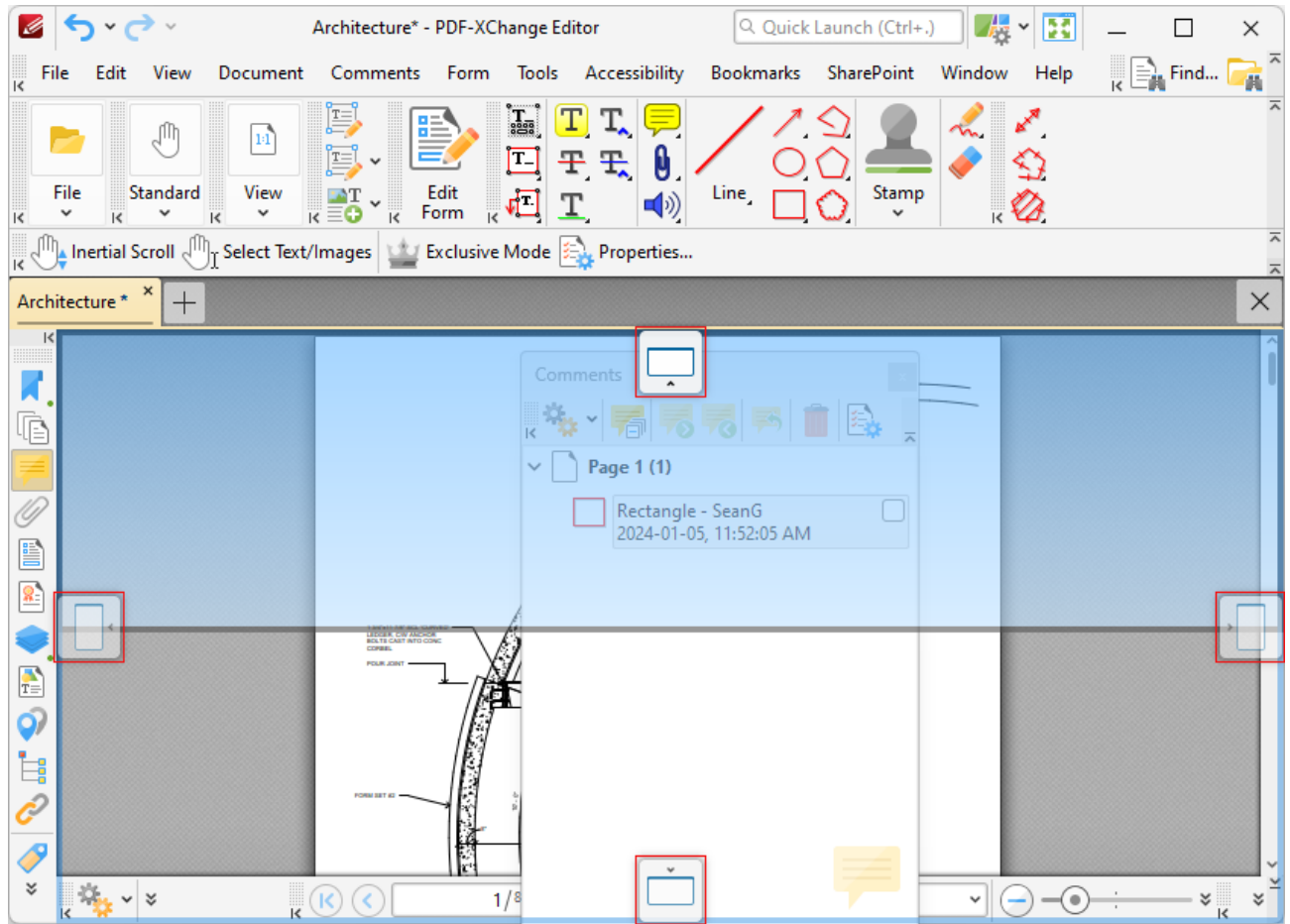
Figure 3. Example Docking Points
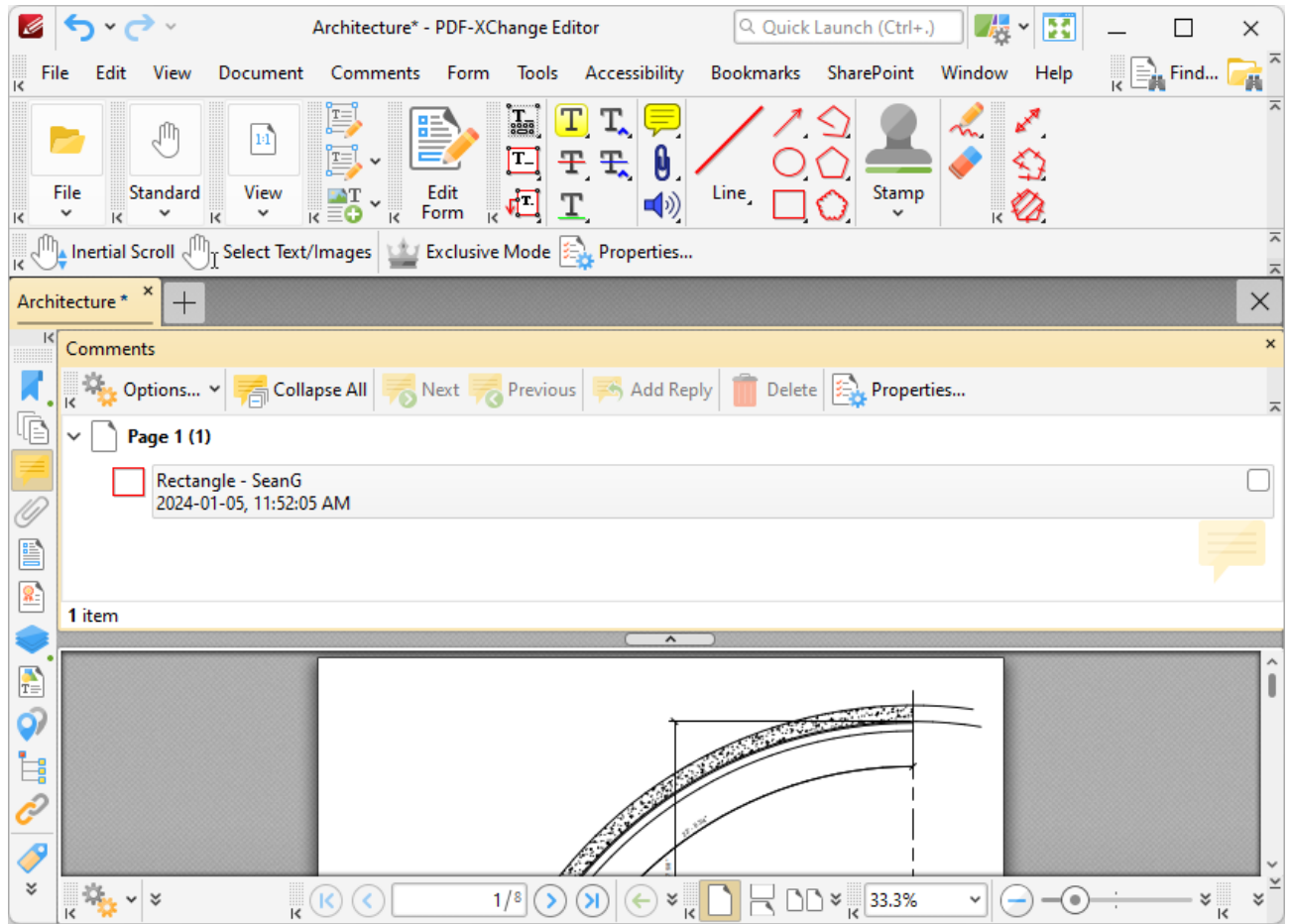
Figure 4. Repositioned Thumbnails Pane

Note that the minimize/maximize buttons can be used to minimize/maximize panes:

Figure 5. Minimize/Maximize Buttons

Document Panes

Document panes can be edited in the same manner as editing panes. Click and drag document tabs to reposition panes:

Figure 6. Document Tab Highlighted

Available docking points will be displayed in the center of the user interface:
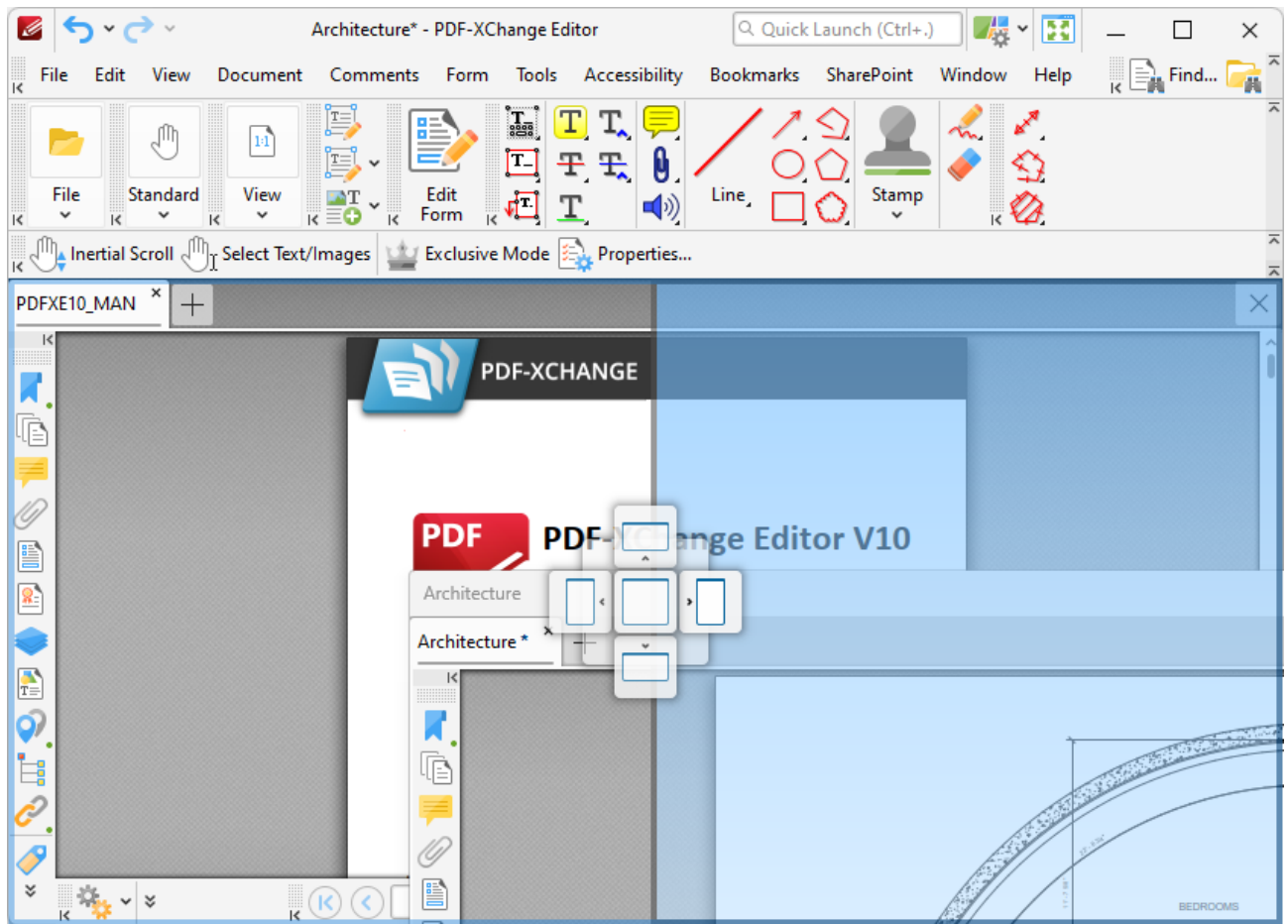
Figure 7. Document Pane Docking Points

Drag document panes onto docking points in order to open them in a new window above/below or to the left/right of the current pane. Dragging document panes to any other location will open them in a new instance of **PDF-XChange Editor.**

6.8 Converting Files to PDF

Converting Files to PDF

A range of options are available in **PDF-XChange Editor** for converting files to PDF, including the default features to:

- **Convert CSV Files to PDF.** [128]
- **Convert Image Files to PDF.** [140]
- **Convert Markdown Files to PDF.** [125]
- **Convert RTF Files to PDF.** [131]
- **Convert Text Files to PDF.** [120]
- **Convert Clipboard Content to PDF.** [156]

A list of all file formats that can be converted to PDF is available in the **Convert to PDF** category in the **Preferences** dialog box available via the **Edit** tab:
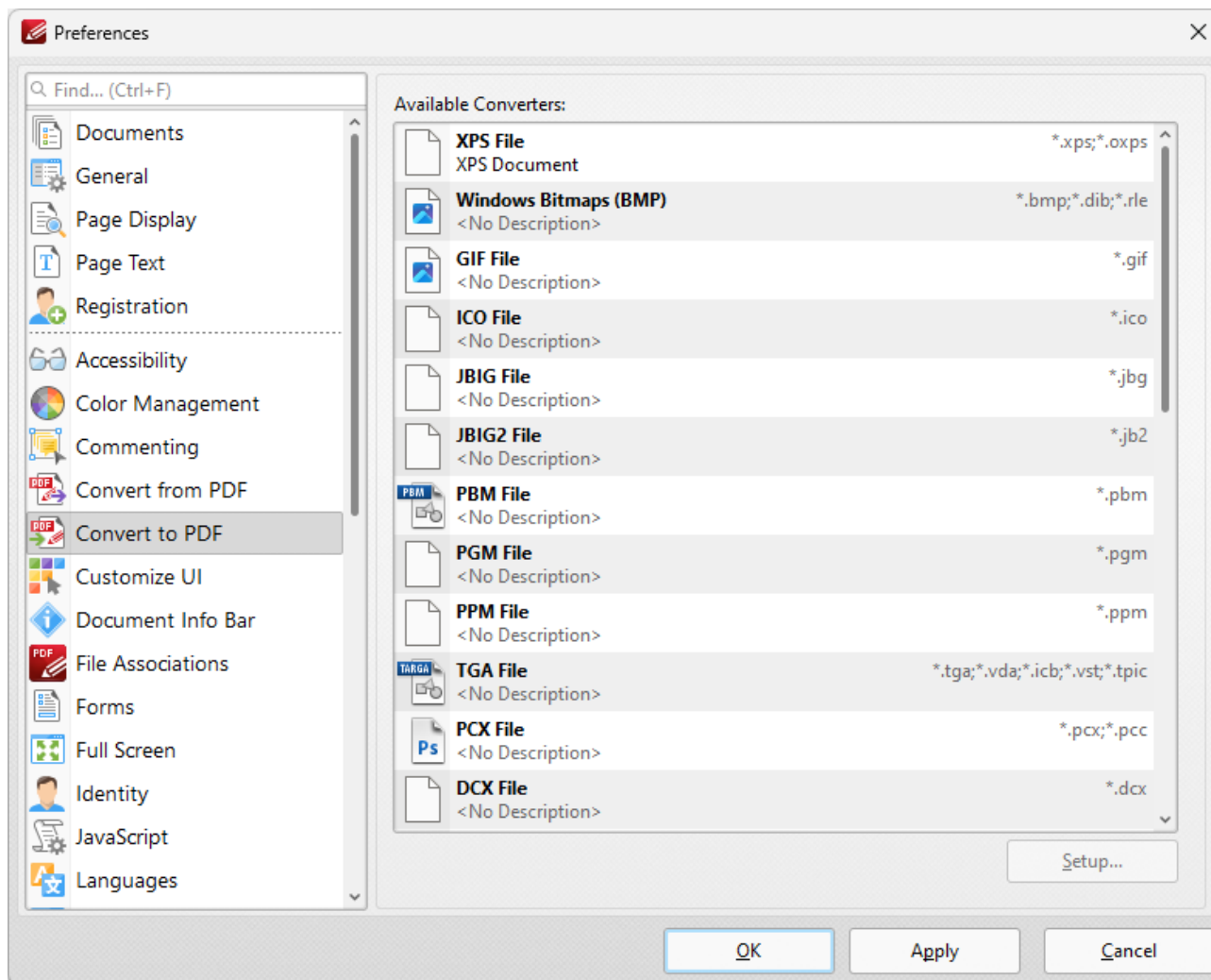
Figure 1. Preferences Dialog Box, Convert to PDF Category

Available formats include **MS Excel/PowerPoint/Word/Publisher/Visio, Windows Metafile** and **XPS.** If you want to convert these files formats to PDF, then simply open them in **PDF-XChange Editor** and the conversion will take place automatically.

6.9   Document Tab Options

Document Tab Options

Document tab options are available in the right-click shortcut menu of document tabs:
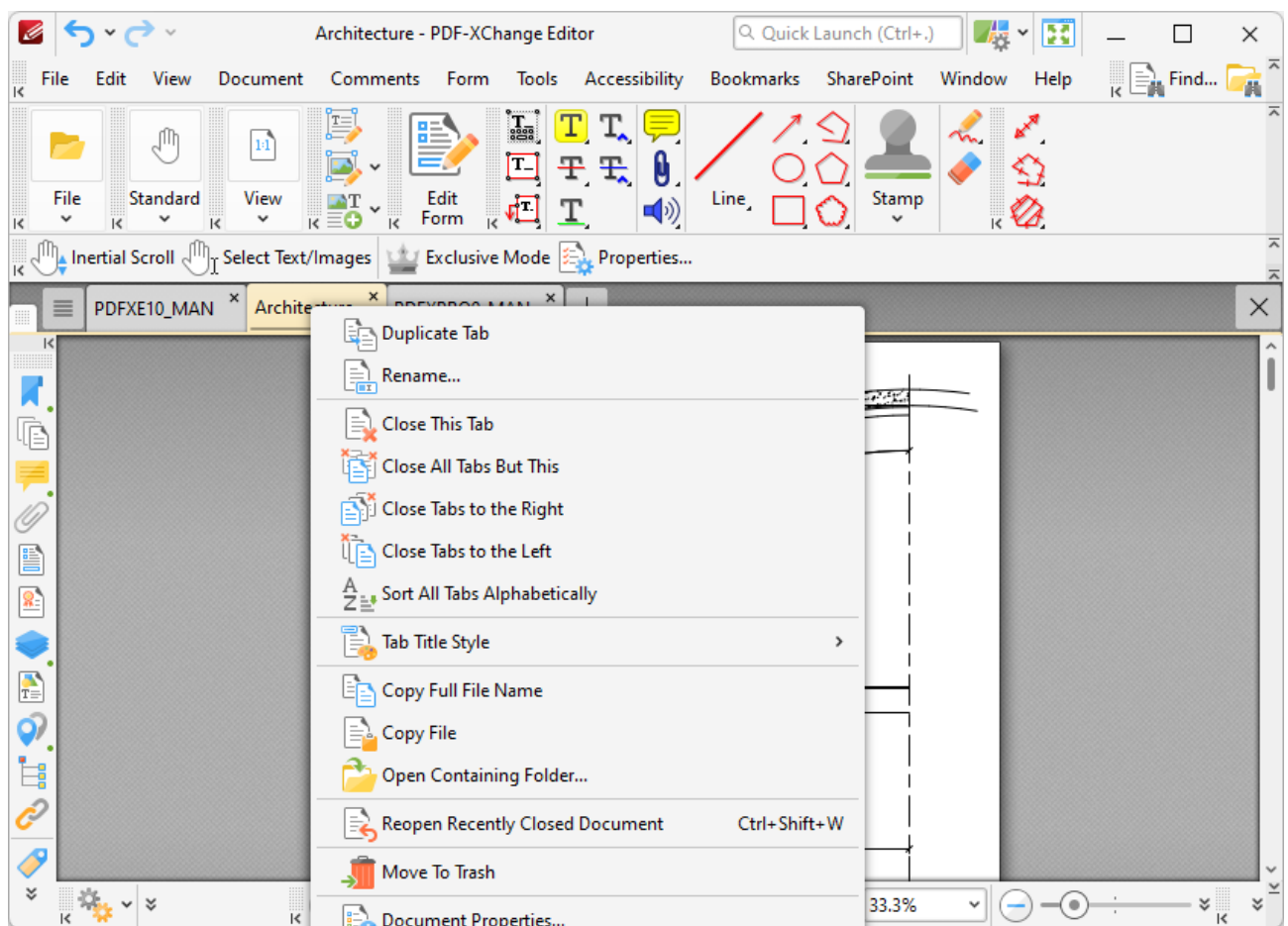
Figure 1. Document Tab Right-Click Shortcut Menu

- Click **Duplicate Tab** to duplicate the selected tab. A new window will open for the same document and the current page and layout options will be inherited.
- Click **Rename** to rename the document.
- Click **Close This Tab** to close the selected tab.

- Click **Close All Tabs But This** to close all tabs except the selected tab.
- Click **Sort All Tabs Alphabetically** to sort all open tabs alphabetically.
- Hover over **Tab Title Style** to view tab title style options:
  - Select **Auto** to determine the tab title style automatically.
  - Select **Document Title** to use the document title as the tab title. Document titles can be viewed/edited in the **Document Properties** of the document.
  - Select **Document Filename** to use the document filename as the tab title.
  - Select **Middle Ellipsis** to set ellipses in the middle of document names that are too long to fit in the document title tab.
  - Select **End Ellipsis** to set ellipses at the end of document names that are too long to fit in the document title tab.
- Click **Copy Full File Name** to copy the full name of the selected file to the clipboard.
- Click **Copy File** to copy the file.
- Click **Open Containing Folder** to open the containing folder of the selected file.
- Click **Move to Trash** to move documents into the **Windows** recycle bin.
- Click **Document Properties** to view document properties.

Note that when multiple tabs are open you can use the keyboard shortcut **[Ctrl+Num1]** to activate the desired document tab. For example, **[Ctrl+Num2]** opens the second document tab, and **[Ctrl+Num5]** opens the fifth document tab.

6.10 Editing Document Pages

Editing Document Pages

PDF-XChange Editor features advanced content editing. The options detailed below facilitate the convenient and efficient editing of PDF documents. However, there is an important distinction to make when using **PDF-XChange Editor** to edit PDF documents. This is because documents are composed of two layers. The first layer consists of PDF content such as text and/or images. The second layer, which by default goes over the first, consists of comments and annotations added to documents. These layers exist and operate independently of each other. This means that editing commands applied to PDF content or comments and annotations will apply only in relation to the layer in which selected items are located. When comments and annotations are flattened they are moved to the content layer and can then be edited at the same time as other content. The menu detailed **here** 1120 can be used to flatten comments.

The following page-editing tools are available in **PDF-XChange Editor:**

- The **Edit Objects Tool** 824 is used to select/edit document content such as images, text, paths and shapes.
- The **Add Tool** 835 is used to add text, images and barcodes to documents.
- The **Edit Form Tool** 319 is used to select/edit form fields.
- The **Select Comments Tool** 846 is used to select/edit comments and annotations.
- The **Content** 548 pane is used to to view/edit page content.

6.11 Features Added in V10

Features Added in V10

The following features were added in version 10 of **PDF-XChange Editor:**

Version 10.0.0.370

- Added functionality that enables the creation of custom stamps, as detailed **here.** ⌐940⌐
- 'Add from Bookmark' option added to the 'Edit Action List' when setting link targets, making it possible to add 'Go To Page' actions using a link target from a bookmark.
- Added the option to create PDFs from webpages without the need to open the webpage, as detailed **here.** ⌐134⌐
- The **Accounting Calculator** was added to the software, making it possible to perform mathematical calculations and add accounting tapes to documents, as detailed **here.** ⌐894⌐
- The **Identify Forms** feature was added to the software, making it possible to identify form fields in documents converted to PDF from other formats, as detailed **here.** ⌐801⌐
- Added the option to use the a webcam for various operations, such as creating new documents from images and creating physical signatures for documents.
- Added functionality that makes it possible to export links to a CSV file, as detailed **here.** ⌐565⌐
- Added functionality enables the editing and manipulation of shapes/paths in document content, as detailed **here.** ⌐824⌐

Version 10.1.0.380

- Added the ability to reverse sub-paths, as detailed **here.** ⌐830⌐
- Updated the **'Replace Pages'** ⌐664⌐ page range options to use a new page range style.
- Added an option to fix invalid 'ToUnicode' maps for embedded fonts.
- Added an option to use 'bottom-up Y-axis' in the **Transform** ⌐205⌐ tool.
- Added an **'Audit Space Usage'** command in the **DocumentInfo** ⌐185⌐ location and the **File** ⌐86⌐ menu.
- Added a feature to **Merge Selected Layers.** ⌐535⌐
- Added an option to paste copied PDF content as stamp.
- Added a feature to search for terms inside the **'Preferences'** ⌐228⌐ dialog box.

- Enhanced the **'Quick Launch'** feature to include finding items inside the **'Preferences'** dialog box.
- Added a live preview of the inking process for the **Pencil Tool** when using a stylus/digitizer.
- Added an option to choose how to truncate document tab titles when the tab is too narrow to display all its text.
- Added an option to allow the application of stamps with the previously used stamp size.
- Added a **Group Policy** to the **PDF-XChange Editor Administrative Template** to prevent users from creating self signed certificates.
- Added a **"Filling Rule"** property for path content items.
- Added an option to apply redactions to form field content.

Version 10.2.0.384

- Added the ability to create 'Places' for **WebDAV** services, as detailed **here.** 88
- Added commands that enable the toggling of document tab title styles in the document tab context menu, as detailed **here.** 1136
- Improved control of image compression in the **Enhance Scanned Pages** 720 operation.
- Updated the **Comments** 519 pane with a range of new features.
- Added the **Set Margins** 687 feature that can be used to set the margins of document pages.
- Added the **Convert Email to PDF** 137 feature.

6.12 Keyboard Shortcuts

Keyboard Shortcuts

PDF-XChange Editor supports a number of keyboard shortcuts that can be used to activate commands:

COMMAND	SHORTCUT
Activate Document Tab Activate the tab number specified, in cases where multiple document tabs are open.	Ctrl+Num1 to Ctrl+Num10
Actual Size Set the zoom level to 100% and show document pages at their actual size.	Ctrl+1
Add Bookmark Create a new bookmark that points to the current page.	Ctrl+Shift+B
Align Text Left Align text to the left.	Ctrl+L
Align Text Right Align text to the right.	Ctrl+R

Attachments Show/Hide the **Attachments** pane.	Ctrl+Shift+A
Auto-Scroll Enable/Disable the auto-scroll feature.	Ctrl+Shift+H
Back Navigate Backward.	Alt+Left
Bold Make the selected text bold.	Ctrl+B
Bookmarks Show/Hide the **Bookmarks** pane.	Ctrl+B
Calibrate Measurement Create a new scale for use with the measurement tools.	Ctrl+Shift+C
Center Text Center selected text.	Ctrl+E
Close Close the active document.	Ctrl+W
Comments Show/Hide the **Comments pane.** [519]	Ctrl+M
Contents Launch online manual.	F1
Copy	Ctrl+C

Copy the selection to the clipboard.	
Create New Document Create a new, blank document.	Ctrl+N
Crop Pages Redefine the visible area of the document.	Ctrl+Shift+T
Cut Copy the selection to the clipboard and remove it from the active document.	Ctrl+X
Delete Delete the selection.	Delete
Delete Pages Delete pages from the active document.	Ctrl+Shift+D
Demote Bookmarks Demote the selected bookmarks.	Alt+Right
Document Info Bar Show/Hide the Document Info Bar.	Ctrl+Alt+I
Document Properties Show the properties of the active document.	Ctrl+D
Edit Code Snippets	Ctrl+J

Manage JavaScript code snippets.	
Edit Form Edit/create form fields.	Ctrl+Shift+7
Enable Hand Tool Temporarily Override the active tool with the **Hand Tool**	Press and hold Space
Enable Snapping Enable the snapping feature.	Ctrl+Shift+;
Exclusive Mode Enable/Disable exclusive mode for the active tool. Hold Shift to enable **Exclusive Mode** temporarily.	Ctrl+G, Ctrl+E
Exit Exit the application.	Ctrl+Q
Extract Pages Extract pages from the active document.	Ctrl+Shift+E
Fields Show/Hide the **Fields** pane.	Ctrl+I
Find Find text in the active document.	Ctrl+F
First Page Move to the first page of the document.	Home

Fit Page Fit the active page(s) to the document window.	Ctrl+0
Fit Visible Fit the active page(s) according to width and exclude white margins.	Ctrl+3
Fit Width Fit the active page(s) according to width and include white margins.	Ctrl+2
Forward Navigate forward.	Alt+Right
Full Screen Mode View document in full screen.	F11
Go to Bookmark Move to the selected bookmark.	Space
Go to Destination Move to the selected bookmark.	Space
Go to Next Entry Move to the next found item. (This is intended for use with the **Find** 215 feature).	F3
Go to Page Move to specific page of the active document.	Ctrl+Shift+N

Go to Previous Entry Move to previous found item. (This is intended for use with the **Find** 215 feature).	Shift+F3
Hide All Comments Hide all comments in the active document.	Ctrl+Shift+8
Highlight Form Fields Highlight *required* form fields. A color background will be inserted.	Ctrl+Alt+H
Insert Pages Insert pages into the active document.	Ctrl+Shift+I
Invert Selection Deselect the current selection and select unselected items. This shortcut is intended for use with the **Editing Panes.** 517	"Num *"
Italic Italicize selected text.	Ctrl+I
Justify Text Justify selected text.	Ctrl+J
Last Page Move to the final page of the document.	End
Layers	Ctrl+L

Show/Hide the Layers pane. The Layers pane shows the structure of the document's layers, allowing for their visibility to be altered.	
Menu Toolbar Show/Hide the **Menu Toolbar.** 473	F9
Move Down Move the selected bookmark(s) down.	Alt+Down
Move Keybord Focus to Page View Moves the focus of the keyboard to the page view.	Ctrl+Home
Move Up Move the selected bookmark(s) up.	Alt+Up
New Attachment Add a new attachment.	Insert
New Bookmark After Selected Creates a new bookmark after the selected bookmark. If no bookmark is selected then a new one is created at the end of the bookmark list.	Insert
New Bookmark Before Selected Creates a new bookmark before the selected bookmark. If no bookmark is selected then a new one is	Alt+Insert

created at the end of the bookmark list.	
New Child Bookmark Creates a new bookmark as the first child of the selected bookmark. If no bookmark is selected then a new one is created at the end of the bookmark list.	Ctrl+Alt+Insert
New Last Child Bookmark Creates a new bookmark as the last child of the selected bookmark. If no bookmark is selected then a new one is created at the end of the bookmark list.	Ctrl+Insert
New Destination Assign the the current view as a new destination.	Insert
Next Document Move to the next open document.	Ctrl+Tab
Next Page Move to the next page of the active document.	Ctrl+Right
Open Open an existing document.	Ctrl+O
Override Document Colors Display document colors according to the selected color scheme.	Ctrl+Shift+6

Paste Paste the clipboard content into the active document.	Ctrl+V
Preferences Launch the **Preferences** dialog box.	Ctrl+K
Previous Document Move to the previous document.	Ctrl+Shift+Tab
Previous Misspelling Move to the previous misspelling. (This shortcut is intended for use with the **Spell Check** feature).	Alt+F7
Previous Page Move to the previous page of the active document.	Ctrl+Left
Print Print the active document.	Ctrl+P
Promote Bookmark Promote the selected bookmark(s).	Alt+Left
Properties Pane Show/Hide the **Properties** pane for the selected object(s).	Ctrl+`
Properties Toolbar Show/Hide the **Properties Toolbar.** [485] Please note that the contents of this toolbar	Ctrl+E

depends on selected content and/or active tool.	
Redo Reverse the most recent *undo* action.	Ctrl+Y
Rename Rename the selected item. Please note that this shortcut only works with items that have editable names, such as forms.	F2
Reopen Recently Closed Document Reopen closed documents.	Ctrl+Shift+W
Rotate Counterclockwise Rotate the current view counterclockwise. Please note that this feature is intended for viewing purposes - the original document is not modified.	Ctrl+Shift+"Num-"
Rotate Clockwise Rotate the current view clockwise. Please note that this feature is intended for viewing purposes - the original document is not modified.	Ctrl+Shift+"Num+"
Rotate Pages Rotate pages of the active document.	Ctrl+Shift+R
Run Run the script written in the console window.	Ctrl+Enter

Run Selection Run selected script.	Ctrl+Shift+Enter
Save Save the active document.	Ctrl+S
Save As Save the active document with a new name/location.	Ctrl+Shift+S
Search Pane Show/Hide the **Search** pane.	Ctrl+Alt+F
Select All Select all text.	Ctrl+A
Show All Comments show all comments in the active document.	Ctrl+8
Show Gaps Between Pages Show/Hide gaps between pages.	Ctrl+Shift+G
Show Grid Inserts a grid into the document background to assist in content placement.	Ctrl+'
Show Guides Show/Hide guides to assist in content placement. Click and drag from rulers (see **Show Rulers,** below) to create guides.	Ctrl+;

Show JavaScript Console Show the JavaScript Console.	Ctrl+J
Show Rulers Show/Hide rulers. These can be used to determine the size of document content. The units of measurement for the rulers can be determined in the **Measurement** 274 section of the **Preferences** dialog box.	Ctrl+R
Spell Check Activate the **Spell Check** feature and move to the first misspelling.	F7
Strikethrough Insert a line through selected text.	Ctrl+Shift+S
Thin Lines Enable/Disable the **Thin Lines** feature, which displays all lines used for editing purposes at a thickness of one pixel.	Ctrl+5
Thumbnails Show/Hide the **Thumbnails** pane. This pane displays miniature previews of each page within active documents and enables simple document browsing.	Ctrl+T
Toggle All Command Panes Show/Hide all toolbars and menus.	Ctrl+F8

Toggle All Toolbars Show/Hide all toolbars.	F8
Underline Underline selected text.	Ctrl+U
Undo Undo the most recent action.	Ctrl+Z
Zoom In Zoom in on the page.	Ctrl+"Num+"
Zoom Out Zoom out from the page.	Ctrl+"Num-"
Zoom To Zoom to a custom level.	Ctrl+Shift+M

Keyboard shortcuts can be viewed/edited as follows:

1. Click the **View** the **Menu Toolbar.** 473

2. Hover over **Toolbars**.

3. Click **Customize Toolbars:**
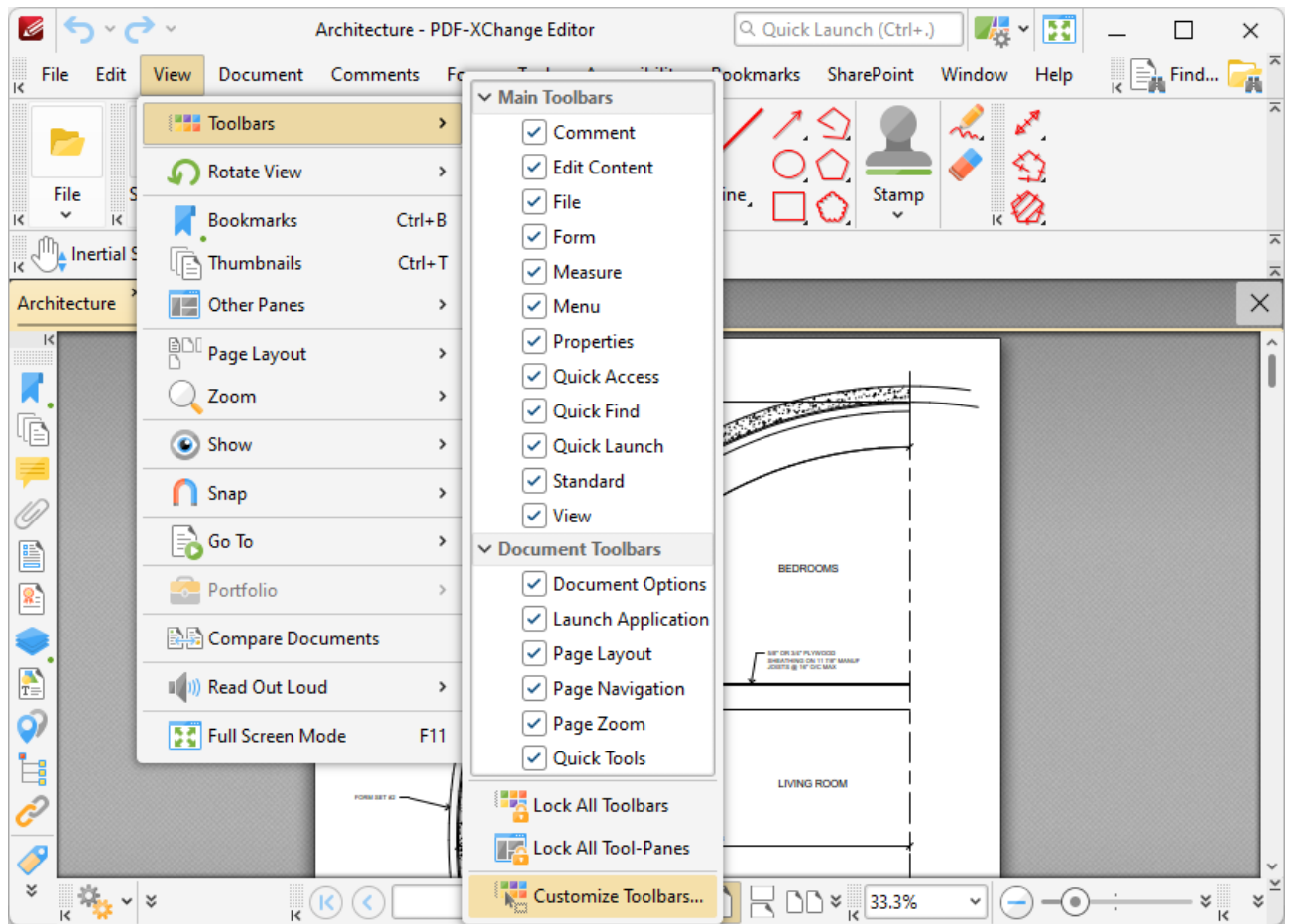
Figure 1. View Tab Submenu, Toolbars Dropdown Menu, Customize Toolbars

4. The **Customize Toolbars** dialog box will open. Click the **Commands** tab:
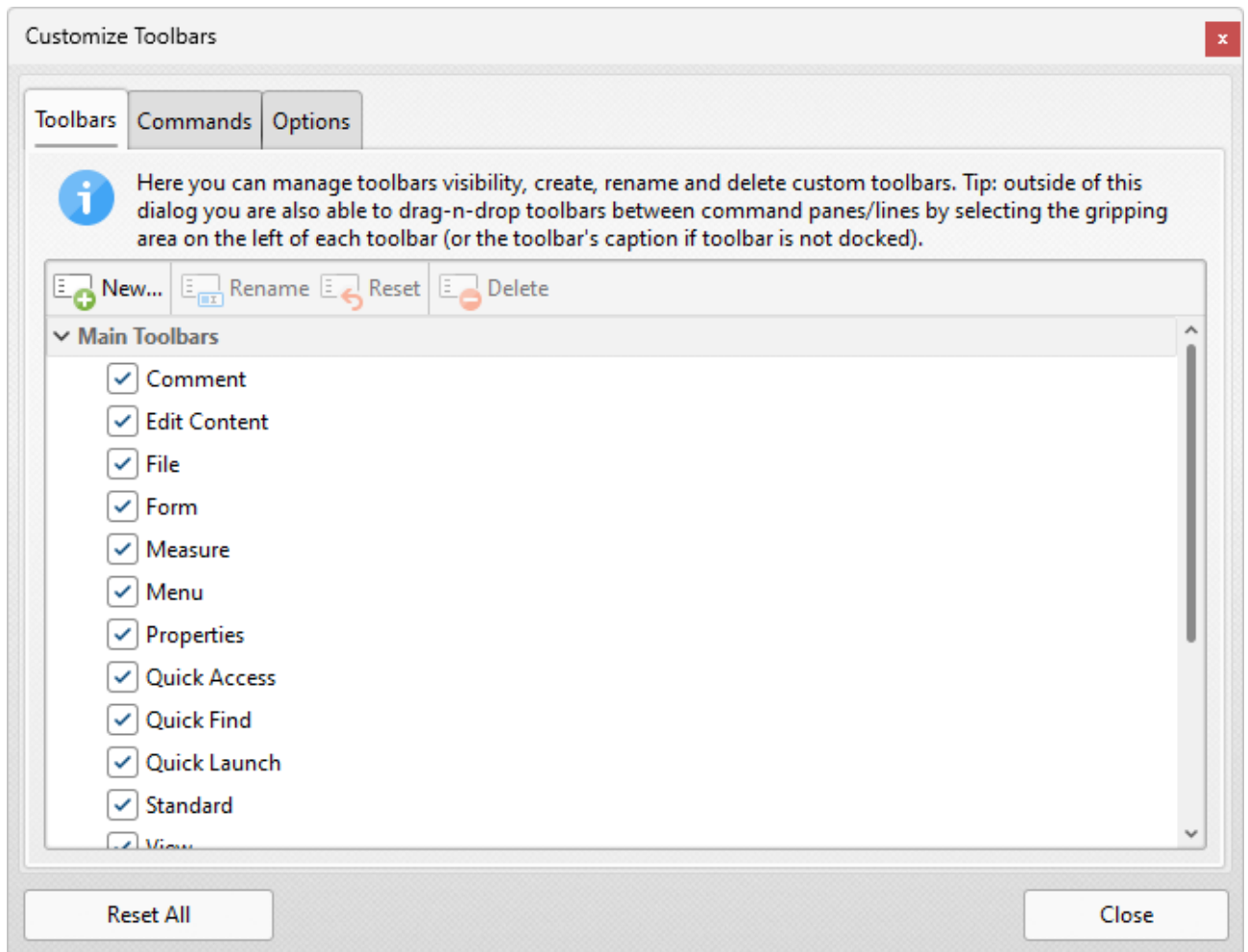
Figure 2. Customize Toolbars Dialog Box, Commands Tab

5. Use the **Categories** list to select a section of the application. (The default selection is **<All Commands>,** which means all available keyboard shortcuts are displayed). The actions and associated keyboard shortcuts of selected sections are displayed in the list on the right.

6. Select actions and click **Properties** to view additional information. For example, the **Command Properties** dialog box for the **Add Bookmark** function is detailed below:
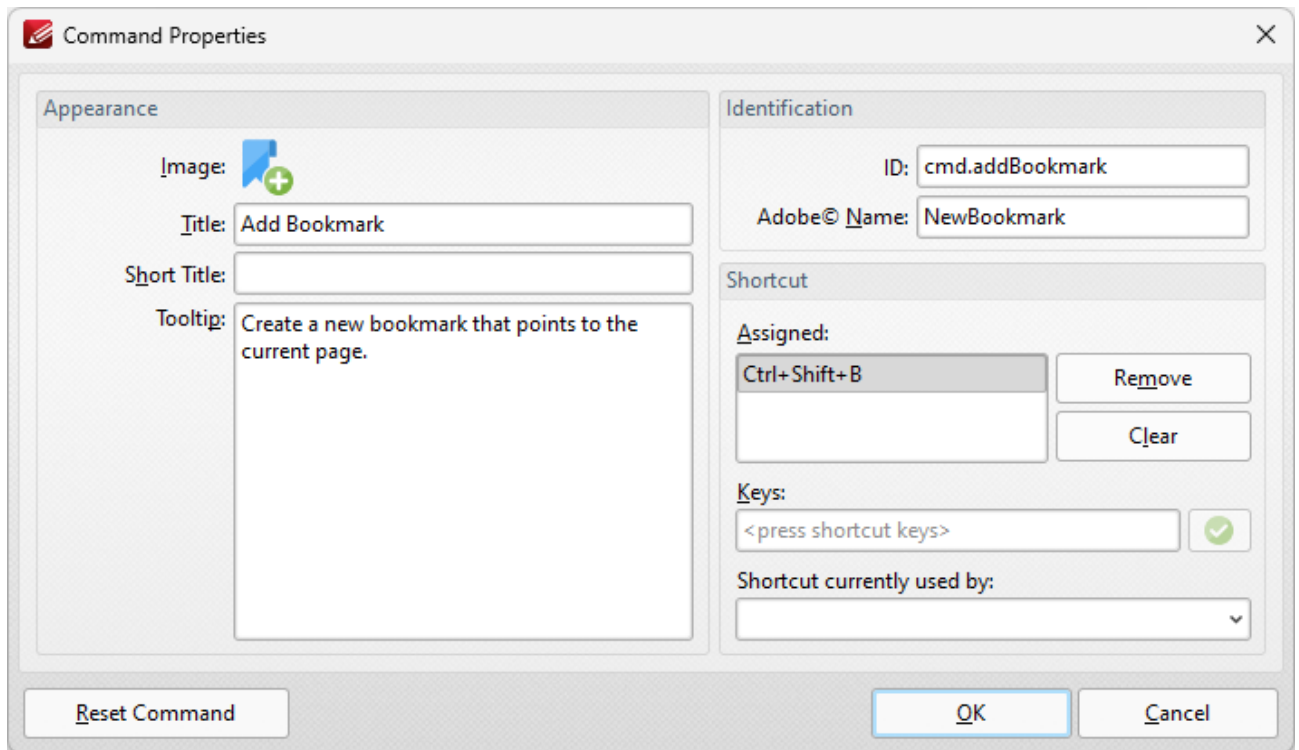
Figure 3. Command Properties Dialog Box

7. Assigned shortcuts are detailed in the **Assigned** pane. Use the **Keys** text box to determine new shortcuts and then press **OK.** (Please note that if entered key combinations are already in use then the associated feature will be displayed in the **Shortcut currently used by** text box).

6.13 Macros

Macros

Macros are used throughout **PDF-XChange Editor.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule that specifies how input characters should be entered to create corresponding output. This means that components of the output process can be simplified during the input process, which makes the work involved less intensive and more dynamic. Multiple macros can be used simultaneously as desired. The format for macros is:

%[<Macro Name>] or, when it is customizable: **%[<Macro Name>:<Parameter>]**. The **<Parameter>** step is optional.

For example, the **Page Number** macro can be used to specify the page numbering format. The syntax for the **Page Number** macro is **%[Page:<Parameter>]** and the following parameters are available:

- **'r'** specifies the use of lower-case roman numerals - **%[Page:r].**
- **'R'** specifies the use of upper-case roman numerals - **%[Page:R].**
- **'L'** specifies page labels as the page numbering format in cases where page labels have been specified. If page labels have not been specified then standard page numbers are used - **% [Page:L].**
- **'<integer>** specifies the minimum number of digits used. This value can be any positive integer from 1 to 12 - for example **%[Page:4]** starts the page numbering as **"0001, 0002, 0003...".**

When macros are available the macro icon is displayed:
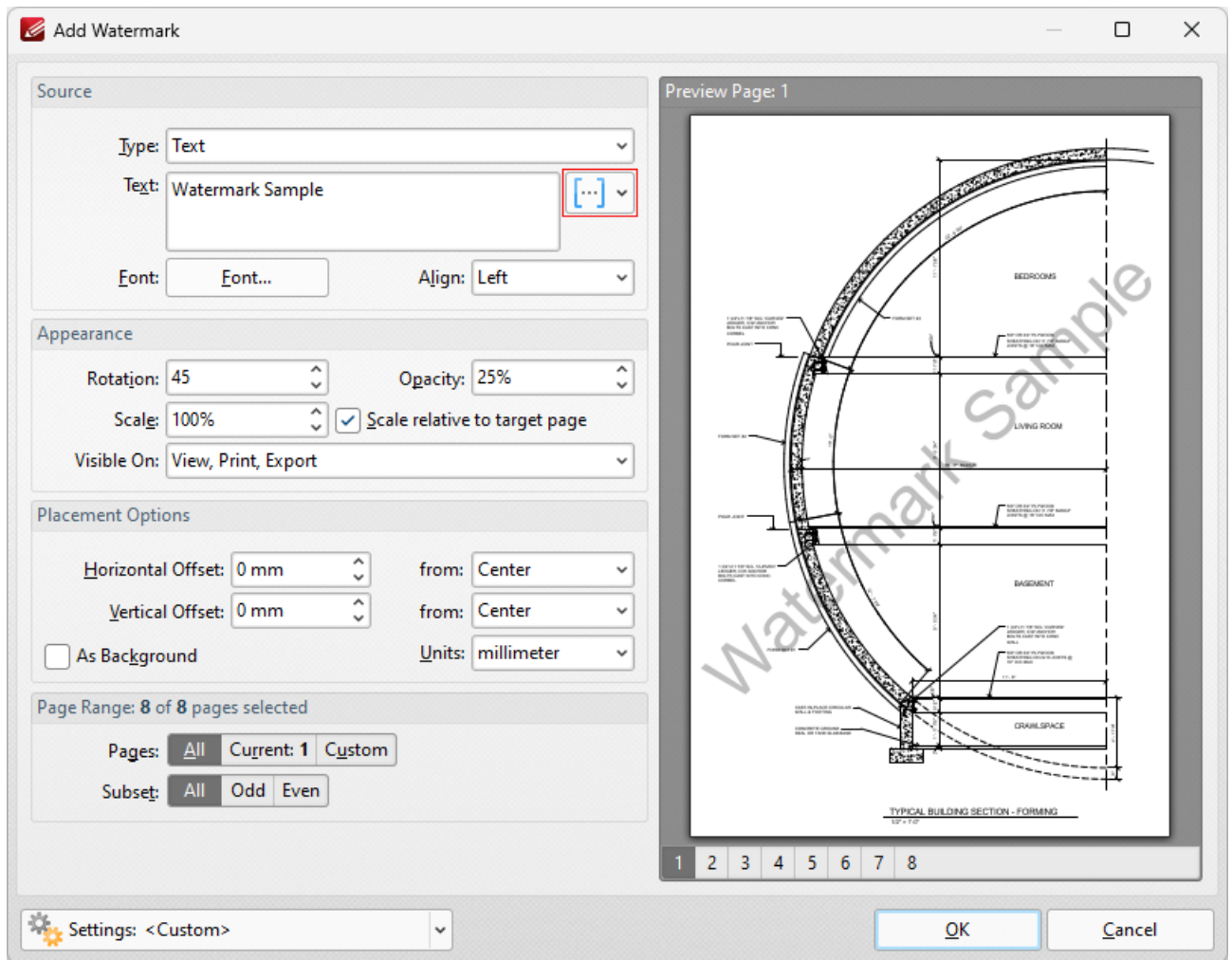
Figure 1. Macro Icon

Click the macro icon to view a list of available options, then click macros to add them to the text box. All available macros are detailed below:

- **Application Version** 1160
- **Auto Number** 1162
- **Bates Numbering** 1165
- **Bates Page Numbering Value** 1167
- **Bookmark Level** 1169
- **Bookmark Title** 1172
- **Computer Name** 1175
- **Date** 1177
- **Day** 1180
- **Document Info** 1186
- **Document Index** 1183
- **Document Title** 1191

- **Environment Variable,** 1193 which has multiple options relating to the **environment variables** of the file.
- **FileName** 1197
- **File Extension** 1201
- **File to Open** 1203
- **Folder Name** 1207
- **Folder Title** 1209
- **Hierarchical Index** 1211
- **Hour** 1214
- **Index in Parent** 1217
- **Minute** 1220
- **Month** 1223
- **Named Destination** 1226
- **Number of Pages** 1230
- **Page First Text Line** 1233
- **Page Label** 1236
- **Page Number** 1239
- **Page Numbering Style** 1244
- **Seconds** 1251
- **Sequential Number** 1254
- **Time** 1257
- **Username** 1260
- **Web Link to Open** 1262
- **Year** 1266

A list of macro-enabled operations is available **here.** 1268

Please note that certain symbols are not compatible with macros and therefore are not permitted in document names. If inconsistencies are noticed between the name used when files are saved and the final file name then it is advised to change the name used when files are saved.

6.13.1   Application Version

Application Version

The **Application Version** macro inserts the build and version of **PDF-XChange Editor** on the local computer.

The syntax for this macro is **%[AppVersion]**

Example
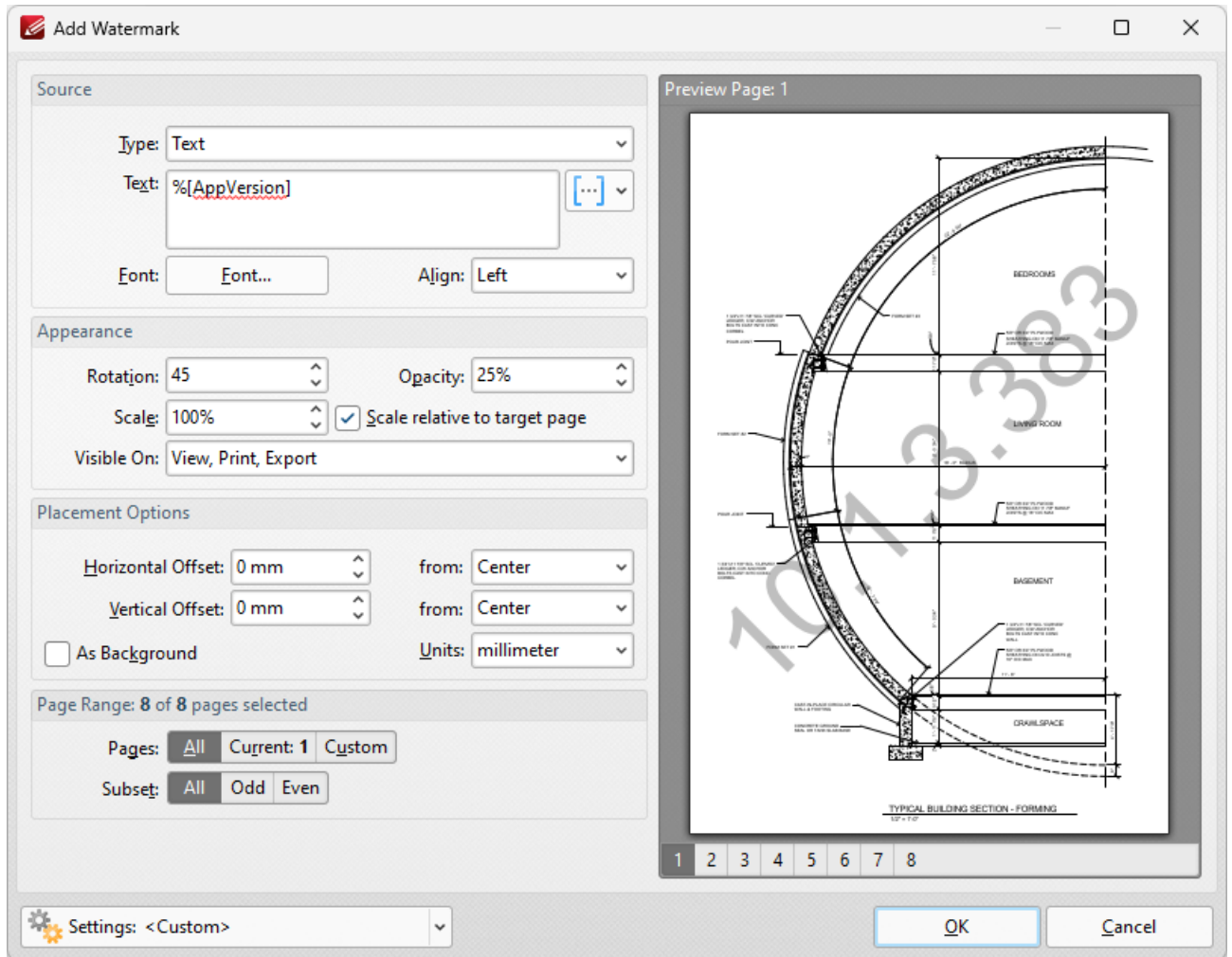
Figure 1. %[Application Version] Macro Example

6.13.2   Auto Number

Auto Number

The **Auto Number** macro inserts a numerical value as the name for output files.

The syntax for this macro is **%[AutoNumber]** and two sections of parameters are available.

The first section determines the format of page numbers:

- **'r'** specifies the use of lower-case roman numerals.
- **'R'** specifies the use of upper-case roman numerals.
- **'L'** specifies page labels as the page numbering format in cases where page labels have been specified. If page labels have not been specified then standard page numbers are used.
- **'<integer>** specifies the minimum number of digits displayed for page numbers. This value can be any positive integer from 1 to 12 - for example **%[Autonumber:4]** starts the numbering as **"0001, 0002, 0003...".**

The second section determines the offset for the start value. Note that the default offset is zero and the default starting value is 1. This means that if, for example, you want to start from 5, then you must specify '4'.

Please note that a semicolon must be used to delimit the sections of parameters. If the second section is not used then the semicolon can be omitted. However, if the first section is not used and the second section is used, then it is necessary to use the semicolon.

The syntax for this macro when both parameters are used is **%[Autonumber:<Parameter 1>;<Parameter 2>]**

The syntax for this macro when only the second parameter is used is **%[Autonumber:;<Parameter 2>].** For example, **'%[AutoNumber:;3]'** sets the start value as four.

Note that the starting value for output files depends on files contained in the destination folder. If the folder is empty, or does not contain files with names that match the output parameters detailed above, then the default values are used. If the folder does contain files that match the output parameters detailed above, then the starting value will be the lowest possible integer.

Example

Follow the steps below to use the **Auto Number** macro to name extracted document pages:

1. Open a multi-page document in **PDF-XChange Editor.**

2. Click **Document** in the **Menu Toolbar,** 473 then click **Extract Pages.** The **Extract Pages** dialog box will open.

3. Enter the desired page range for extraction in the **Page Range** section.

4. Enter the desired %**[AutoNumber]** macro in the **Filename** text box:
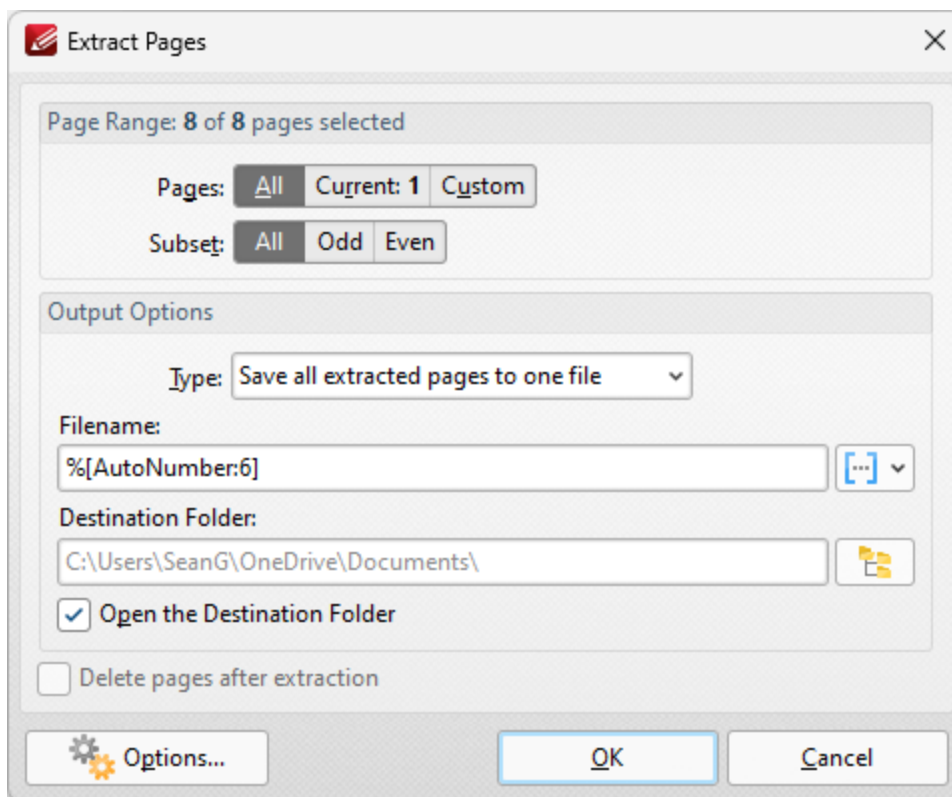
Figure 1. Extract Pages Dialog Box

5. Click **OK.** The pages will then be extracted from the document and autonumbered:
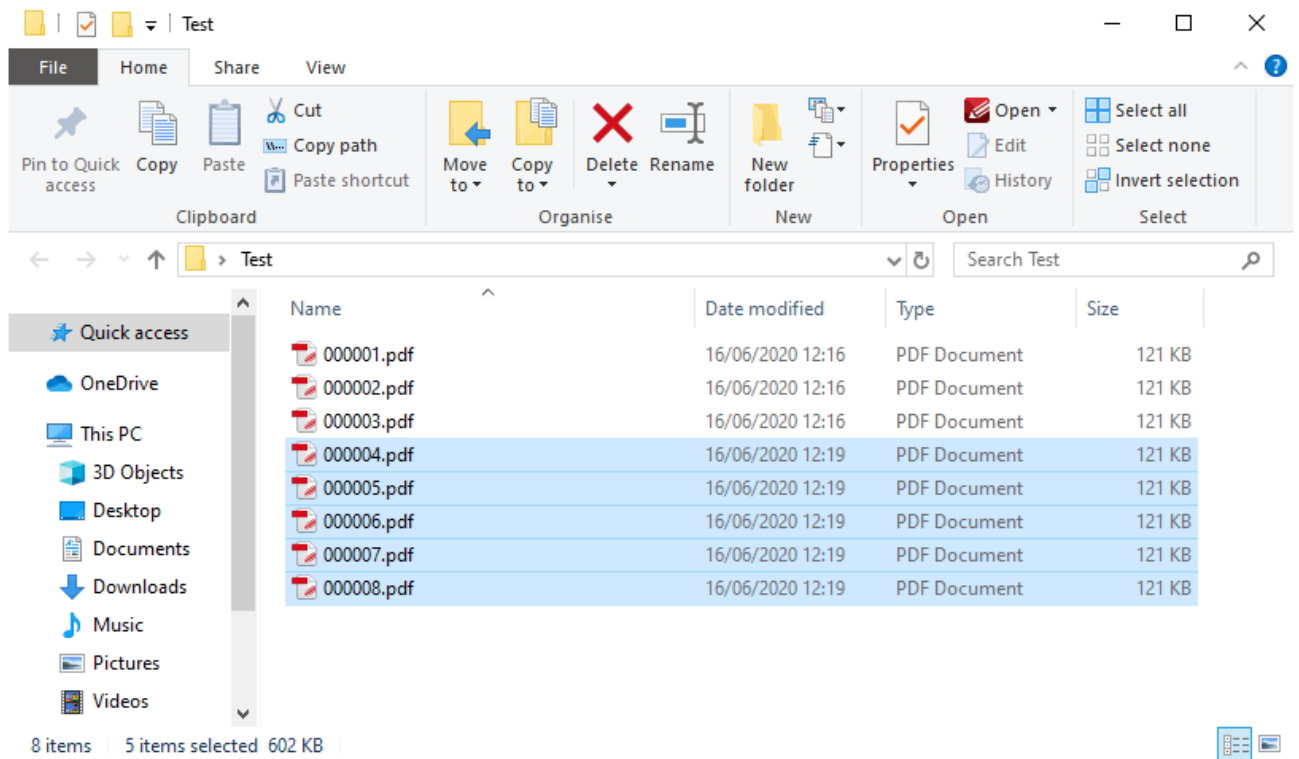
Figure 2. Output Files

Note that that starting value is **'000004.pdf'** as the files **000001.pdf, 000002.pdf** and **000003.pdf** are already present in the destination folder, and each file name uses six digits as the parameter '6' was used.

6.13.3 **Bates Numbering**

Bates Numbering

The **Bates Numbering** macro inserts the Bates numbering value of document pages.

The syntax for this macro is **%[Bates]**

Example
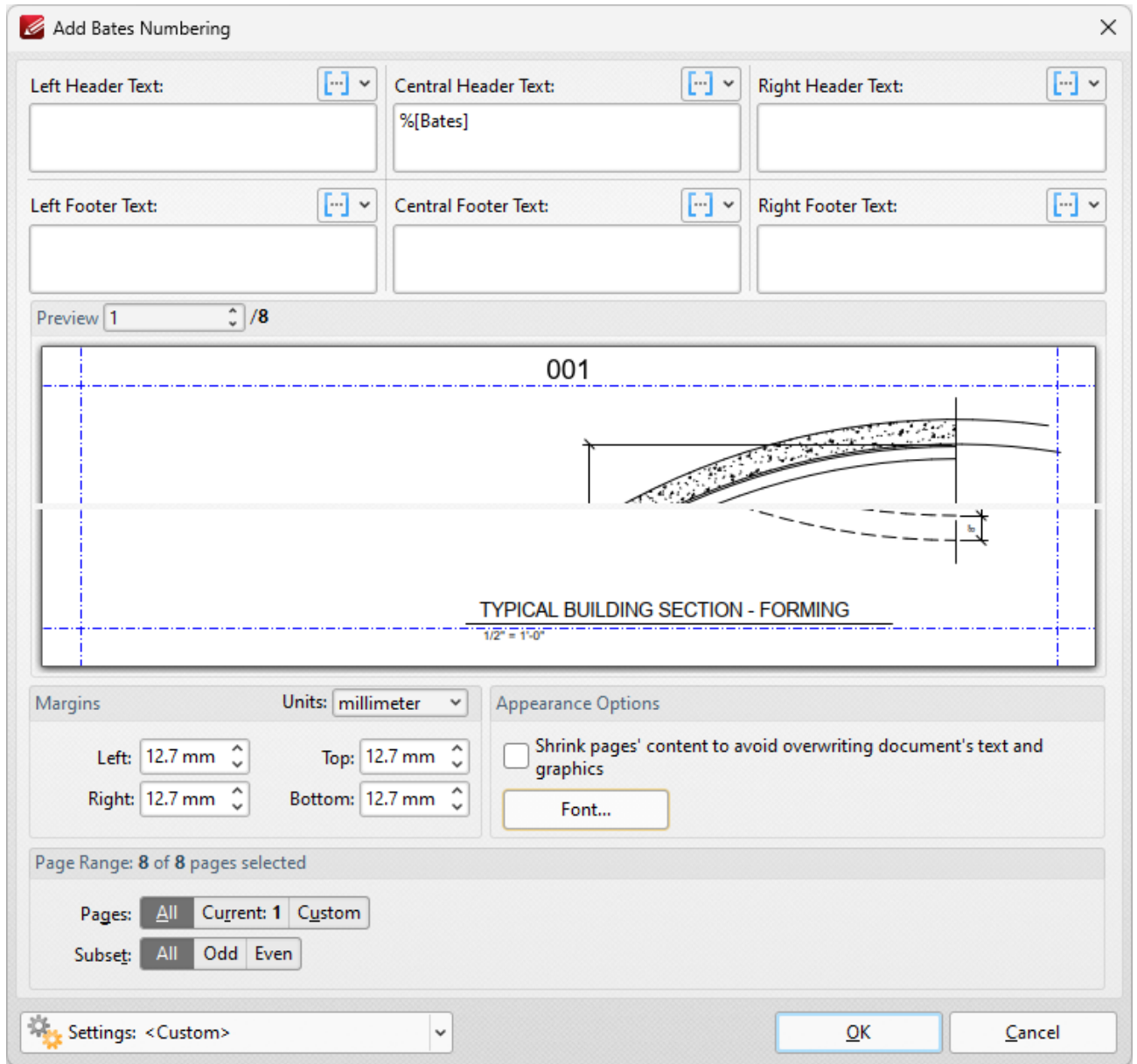
Figure 1. %[Bates Value] Macro Example

6.13.4 **Bates Page Numbering Value**

Bates Page Numbering Value

The **Bates Page Numbering** macro inserts the existing Bates numbering value of document pages.

The syntax for this macro is **%[BatesValue]** and a parameter is available for the specification of a page number as detailed below. If no parameter is used, then the Bates value used will match the Bates number of the pages in the specified page range of the operation.

The syntax for this macro when parameters are used is **%[BatesValue:n]** where 'n' specifies the page from which the Bates number is taken. It is also possible to use **%[BatesValue:^n]** to specify the page that is 'n' pages from the end of the document.

Example

Follow the steps below to use the **Bates Page Numbering Value** macro to create watermarks that contain the Bates number of pages:

1. Open a document that contains Bates numbering in **PDF-XChange Editor.**

2. Click the **Documents** tab, then click **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

3. Enter **%[BatesValue]** in the **Text** text box. The Bates number of pages is then used to create the watermark text for the associated page:
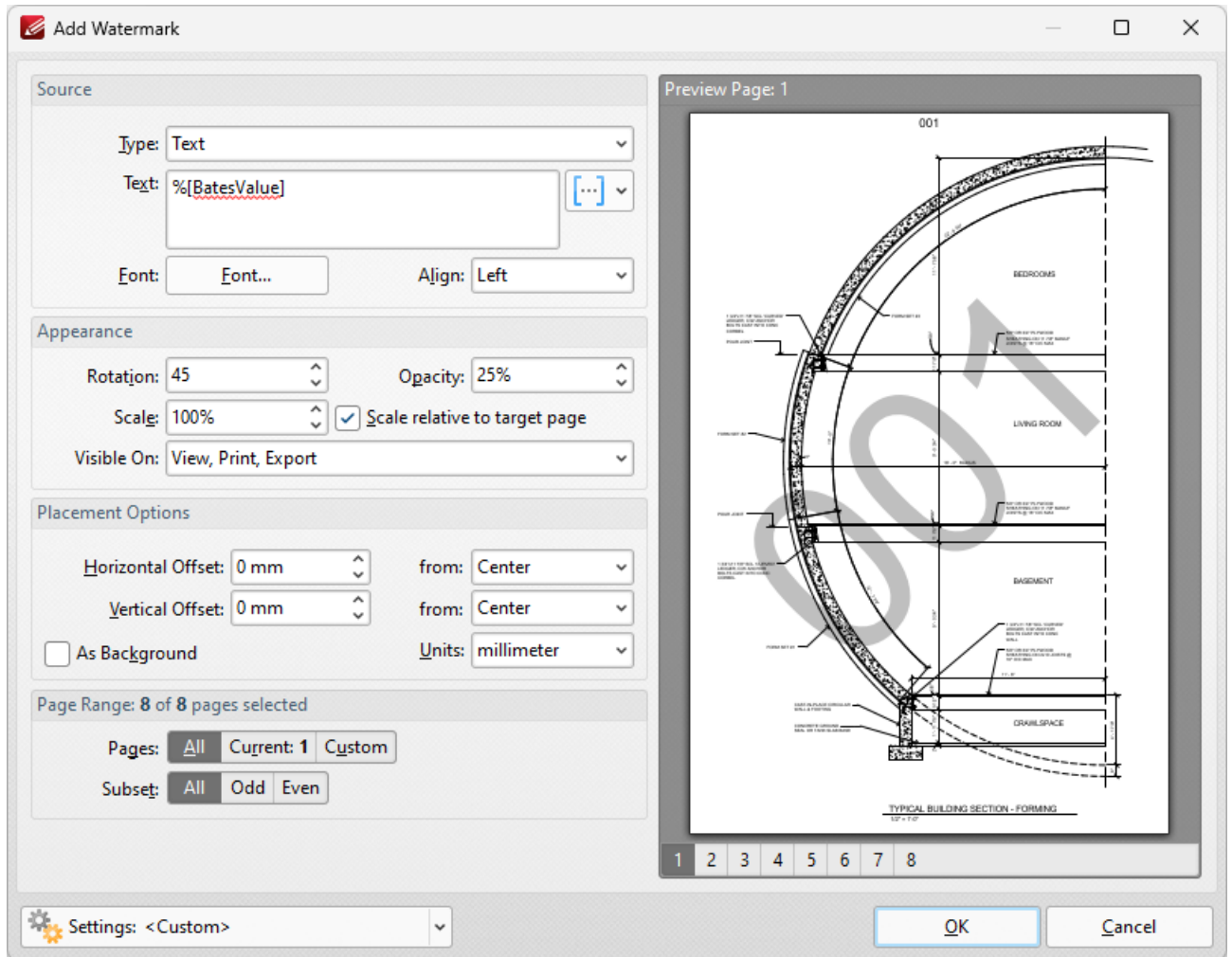
Figure 1. %[Bates Value] Macro Example

6.13.5 **Bookmark Level**

 Bookmark Level

The **Bookmark Level** macro inserts the nested level of bookmarks.

The syntax for this macro is **%[Level]**

Example

Follow the steps below to insert the nested level of bookmarks when adding text to bookmark titles:

1. Open a document that contains bookmarks in **PDF-XChange Editor.**

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Title** dialog box will open.

3. Add the **%[Level]** macro to the **Add Suffix** text box:
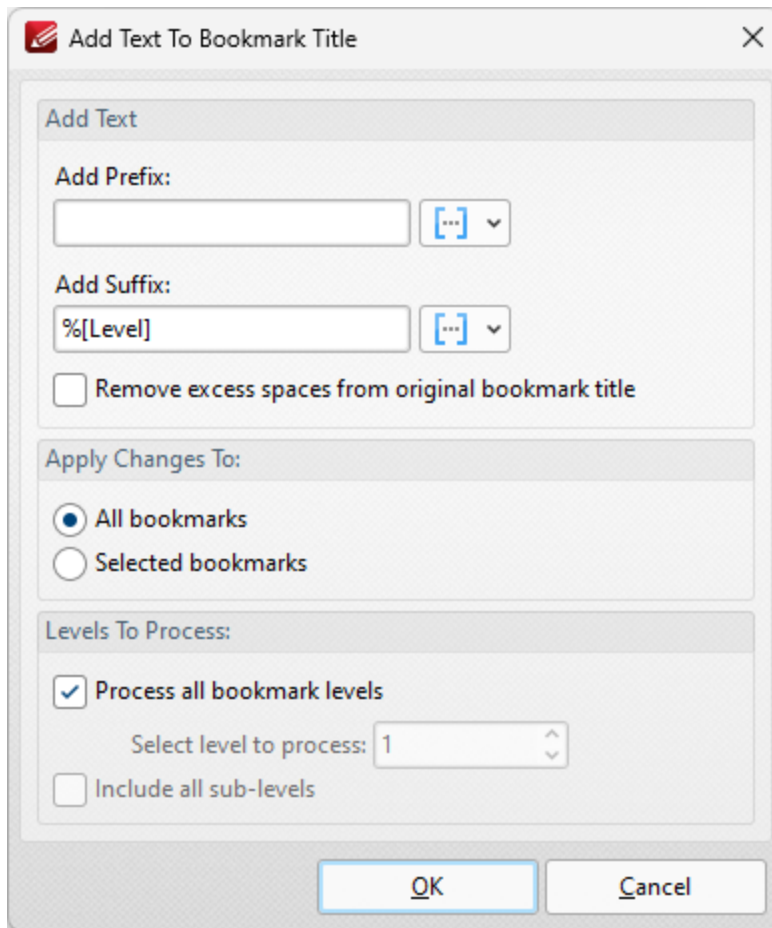
Figure 1. Add Text To Bookmark Title Dialog Box, %[Level] Macro Used as Suffix

4. Click **OK.** The nested level of bookmarks will then be added as a suffix to the existing bookmark titles:

Figure 2. Bookmarks Titles Updated to Include Nested Level

6.13.6 **Bookmark Title**

Bookmark Title

The **Bookmark Title** macro inserts the title of bookmarks.

The syntax for this macro is **%[Title]**

Example

Follow the steps below to insert the title of bookmarks when converting bookmarks to named destinations:

1. Open a document that contains bookmarks in **PDF-XChange Editor.**

2. Click the **Bookmarks** tab, then click **Convert to Named Destinations.** The **Convert to Named Destinations** dialog box will open.

3. Add the **%[Title]** macro to the text box:
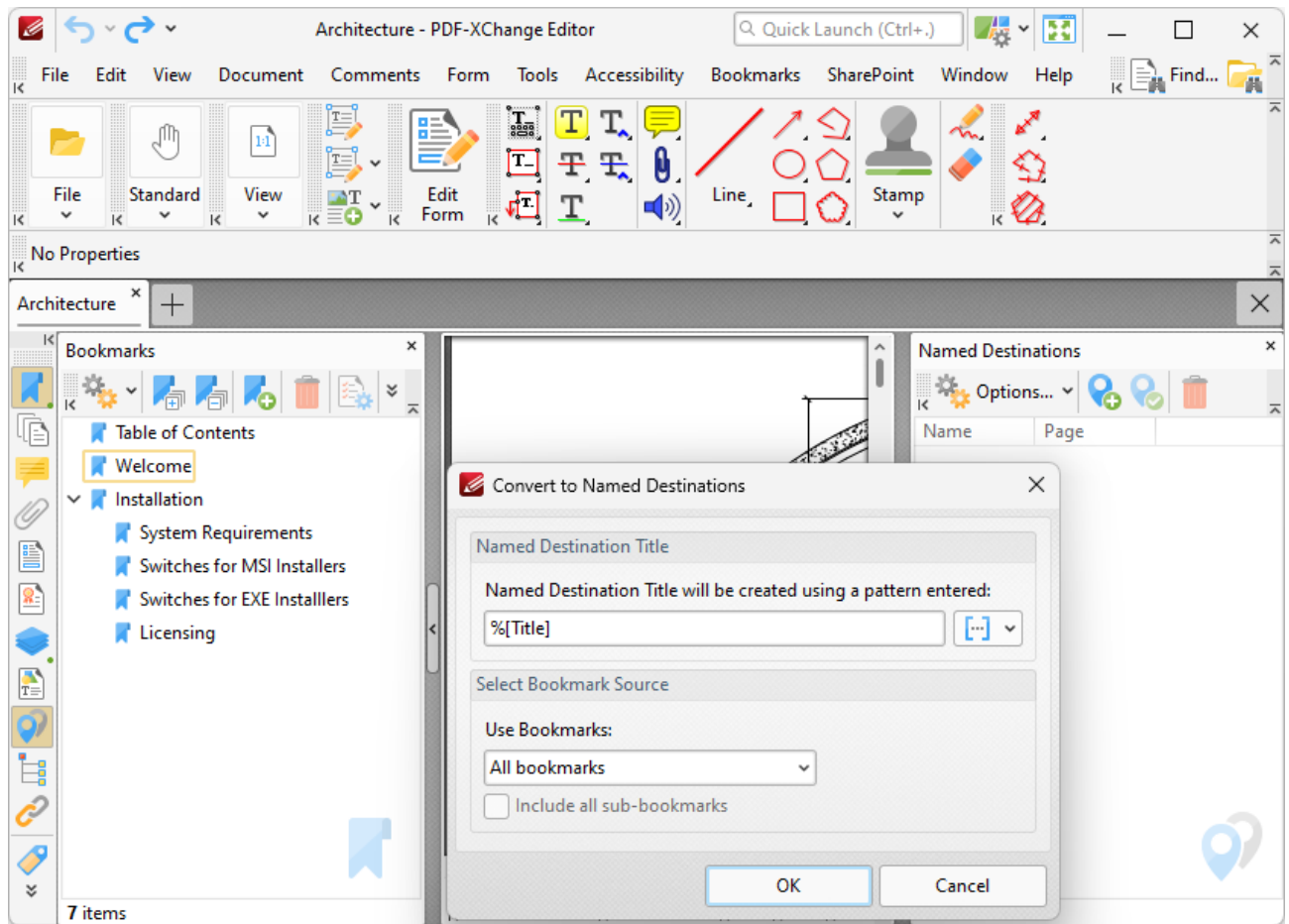
Figure 1. Convert to Named Destinations Dialog Box, %[Title] Macro Used as Pattern

4. Click **OK.** The title of each bookmarks will then be used as the title for each corresponding named destination:
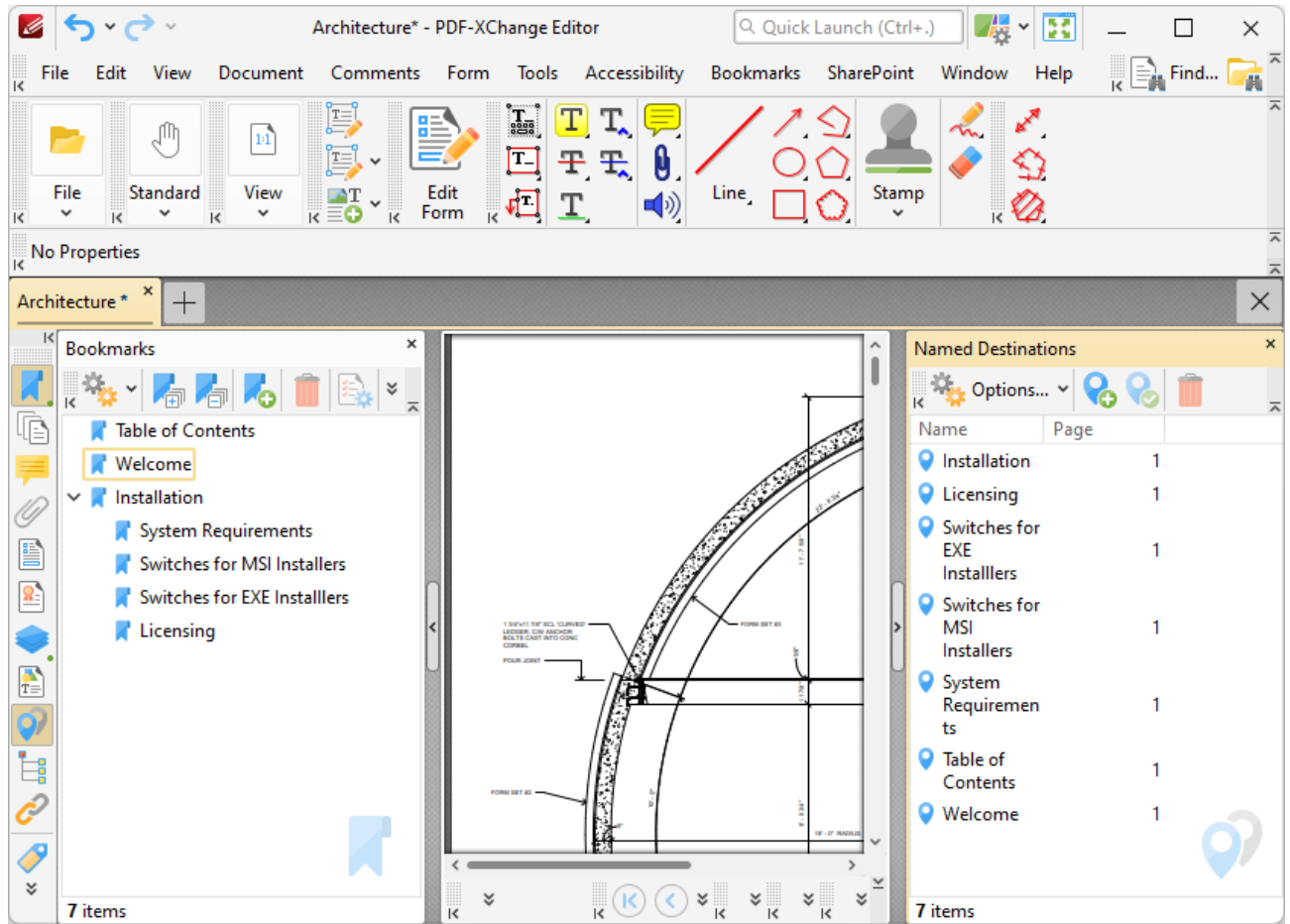
Figure 2. New Named Destinations Created with Matching Names to Source Bookmarks

6.13.7   Computer Name

Computer Name

The **Computer Name** inserts the name of the local computer as defined by the **Windows Computer Name.**

The syntax for this macro is **%[Computer]**

Example
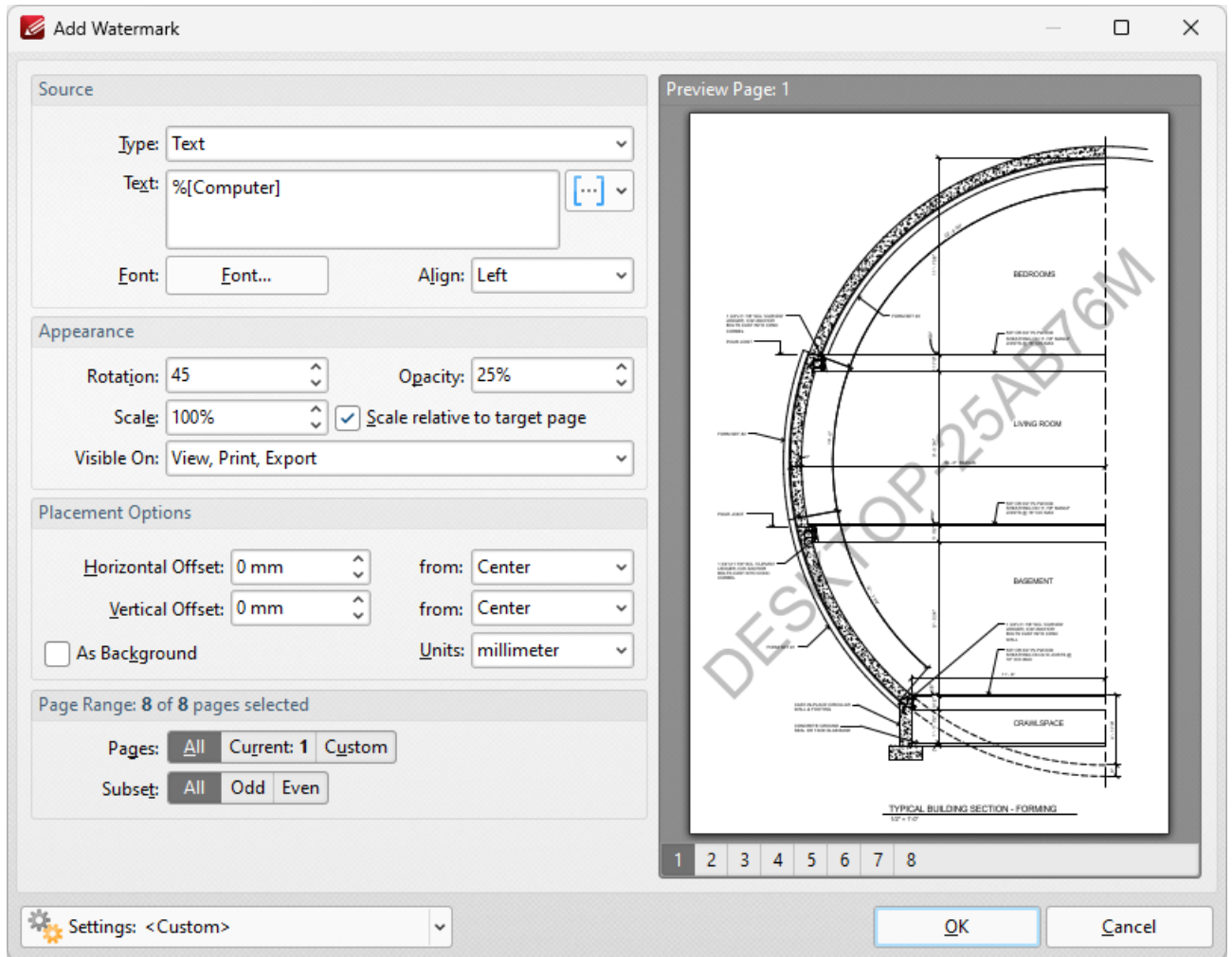
Figure 1. %[Computer] Macro Example

6.13.8 **Date**

Date

The **Date** macro inserts the current date. Multiple date formats are available, as detailed below.

The syntax for this macro is **%[Date]** and the following parameters are available:

- **d** inserts the day of the month and omits the zero in cases of single-digit values.
- **dd** inserts the day of the month and includes a zero in cases of single-digit values.
- **ddd** inserts the day of the week as a three-letter abbreviation.
- **dddd** inserts the day of the week.
- **M** inserts the month and omits the zero in cases of single-digit values.
- **MM** inserts the month and includes a zero in cases of single-digit values.
- **MMM** inserts the month as a three-letter abbreviation.
- **MMMM** inserts the month.
- **yy** inserts the year as two digits and adds a zero in cases of values lower than 10.
- **yyyy** inserts the year.

The syntax for this macro when parameters are used is **%[Date:<Parameter>]**

Note that several parameters can be used in sequence in order to insert a customized date. For example, **%[Date:dddd, dd MMMM yyyy]** inserts the day of the week followed by the day of the month, the month name in full and the year as four digits (as detailed below). If parameters are not specified then output values revert to default, which is the date on the local machine in the format **dd/MM/yyy.**

Example

Follow the steps below to use the **Date** macro to add a header that uses a customized version of the current date:

1. Click **Document** in the **Menu Toolbar.** ⁴⁷³

2. Hover over **Header and Footer** and click **Add.** The **Add Header and Footer** dialog box will open.

3. Enter **%[Date:dddd, dd MMMM yyyy]** in a header text box. A customized version of the current date is then added to the document:
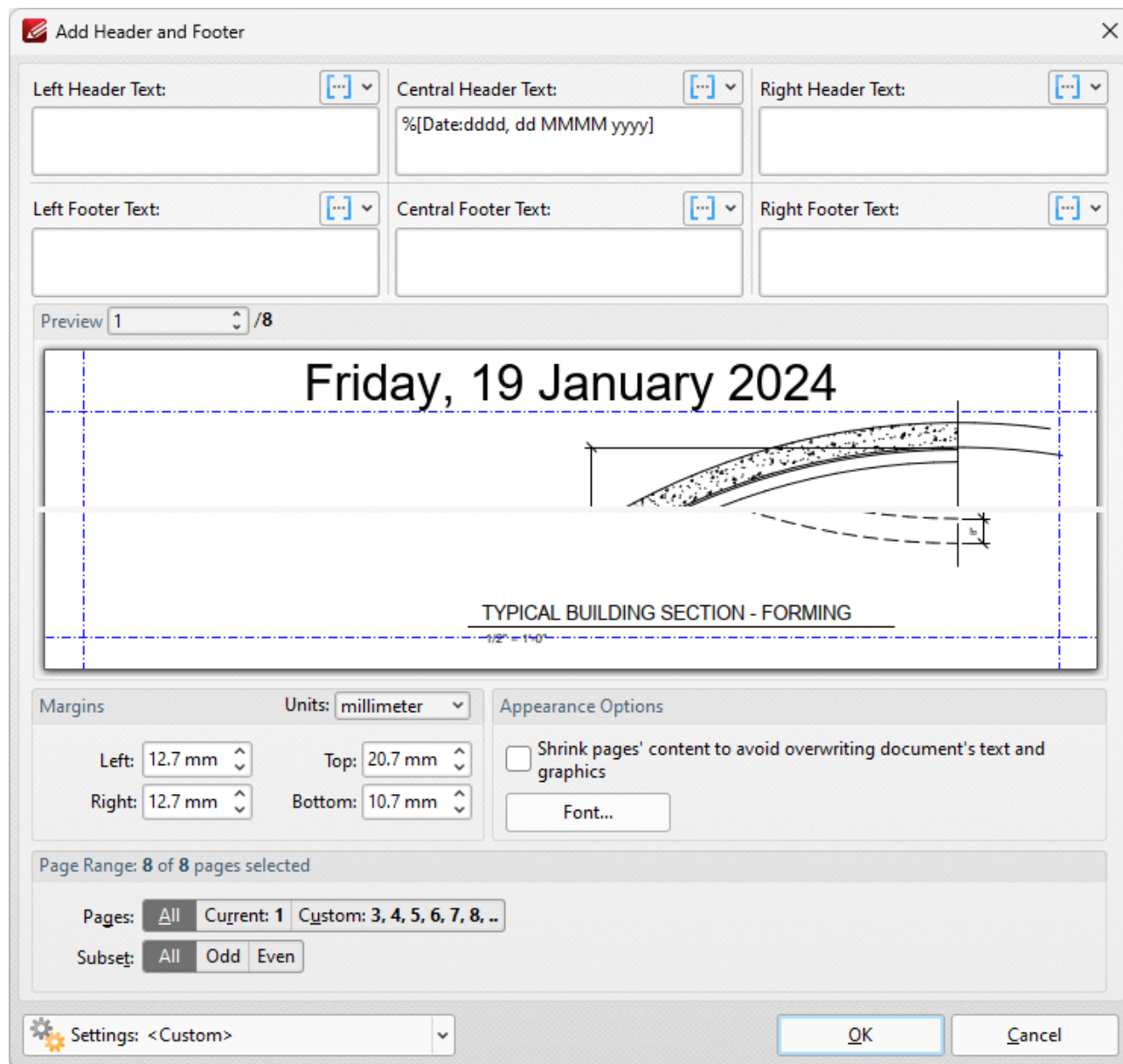
Figure 1. %[Date] Macro Example

Note that a range of preset date formats are provided in **PDF-XChange Editor:**
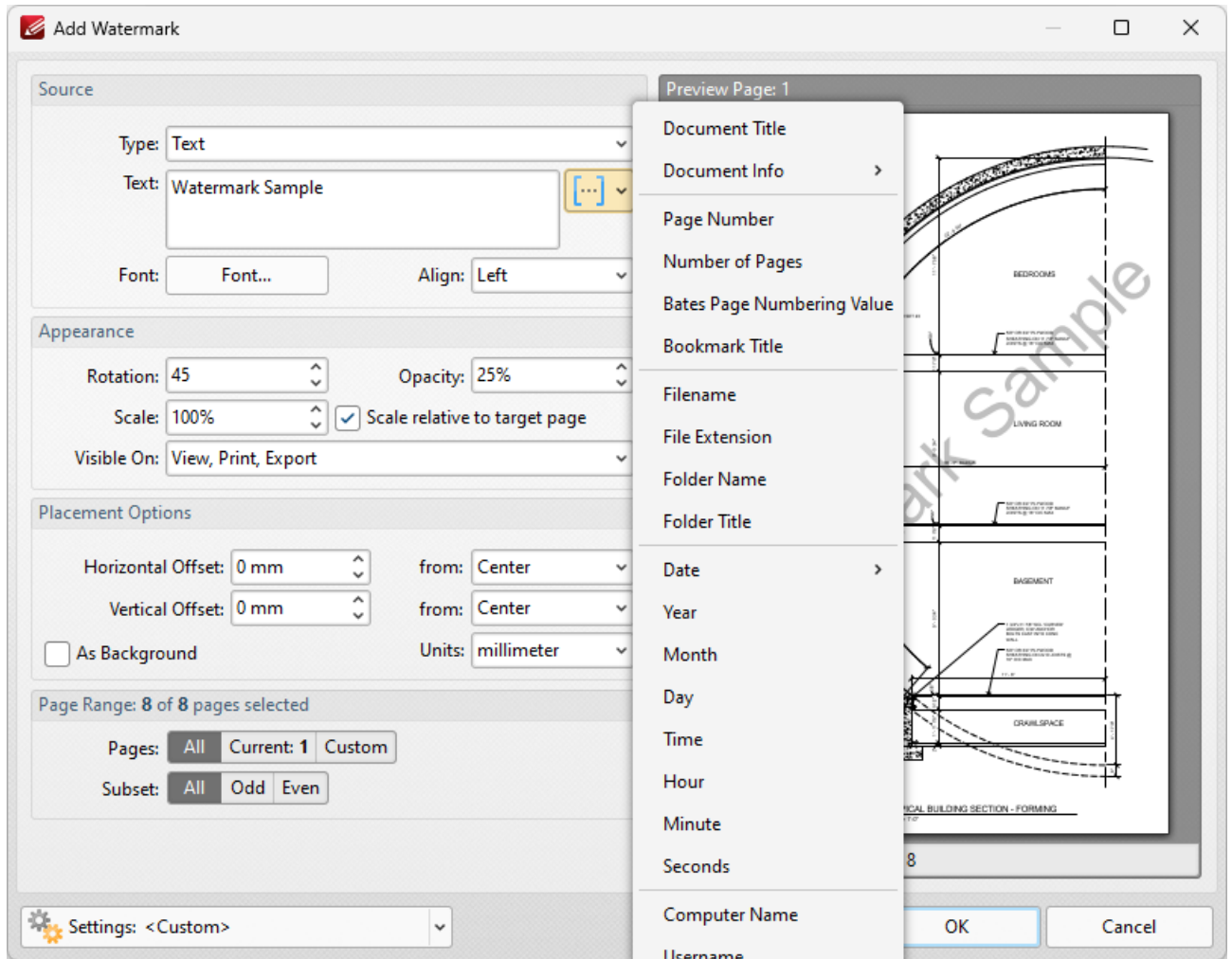
Figure 2. Default Date Macro Formats

6.13.9   Day

Day

The **Day** macro inserts the current day of the month.

The syntax for this macro is **%[Day]**

Example

If the date is 19th January then the **%[Day]** macro inserts "19":
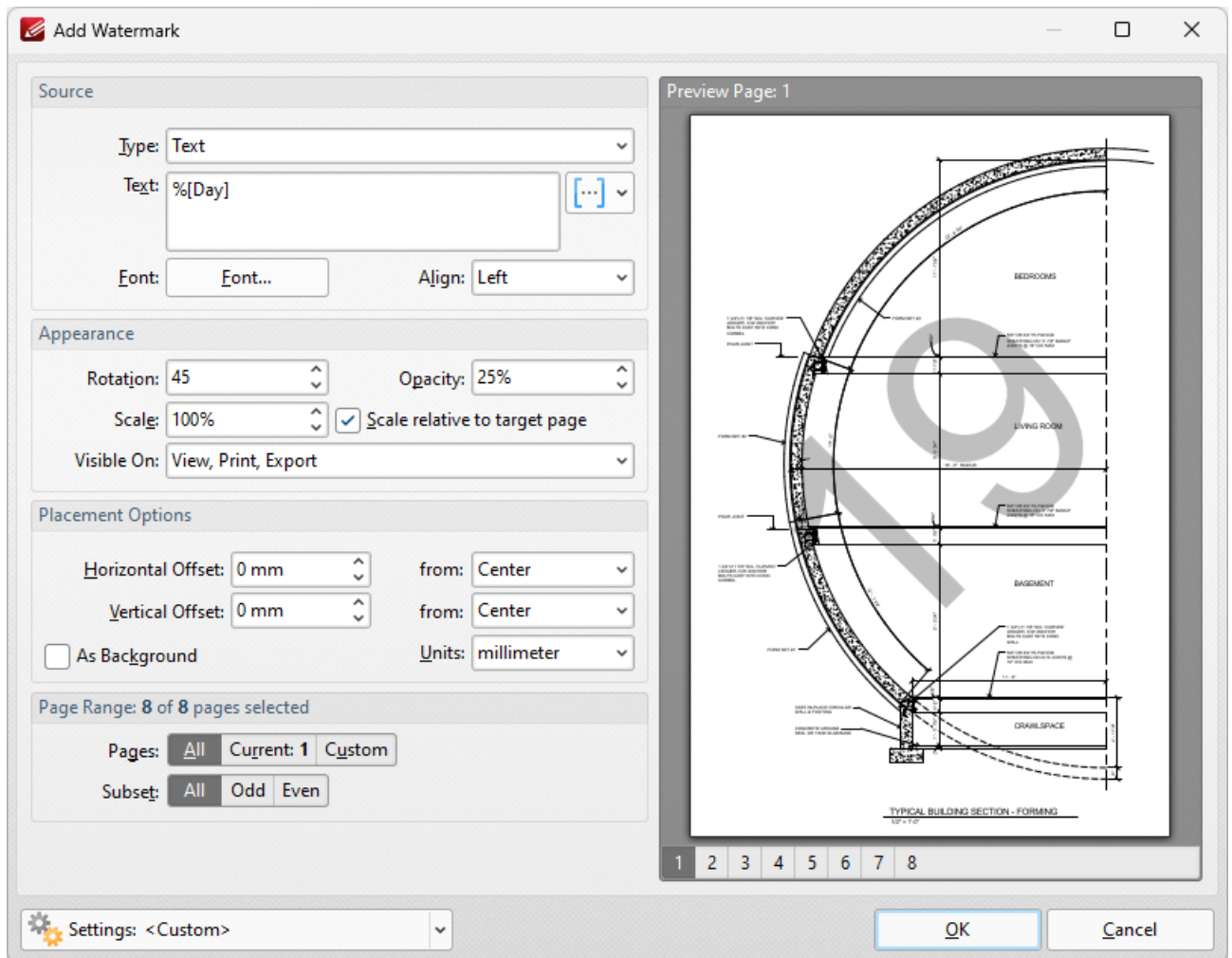
Figure 1. %[Day] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Time:H:mm] %[Month]/%[Day]** output the current time followed by the month and the day of the month:
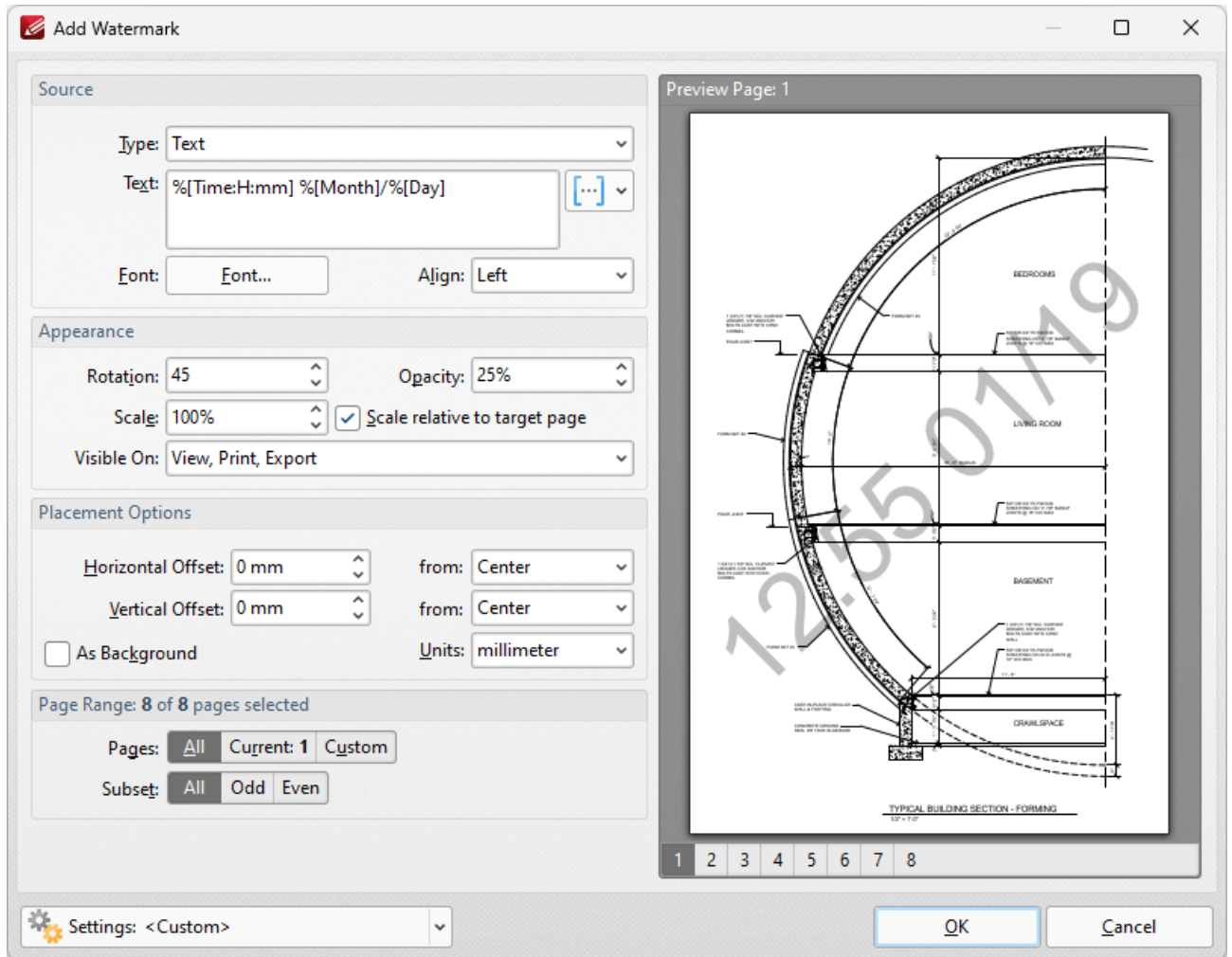
Figure 2. %[Day] Combined Macro Example

6.13.10 **Document Index**

Document Index

The **Document Index** macro inserts the index value of pages, which is the input/output order of the content in the context of a group of input/output content items.

The syntax for this macro is **%[DocNumber]** and a parameter is available for the specification of the minimum amount of digits used for numbering output. This value can be any positive integer from 1 to 12. If the parameter is not used then the output is numbered with the default settings, which uses the page number of source files as the output number.

The syntax for this macro when parameters are used is **%[DocNumber:<Parameter>]** - for example **%[DocNumber:4]** starts the numbering as **"0001, 0002, 0003...".**

Example

Follow the steps below to use the **Document Index** macro to extract each page of a document to a new document that uses the page number of source pages as the title of the output documents:

1. Click **Document** in the **Menu Toolbar,** 473 then click **Extract Pages.** The **Extract Pages** dialog box will open.

2. Specify a page range to be extracted. This example will extract pages 6-10 of a ten page document.

3. Select **Save each page to a separate file** in the **Type** dropdown menu, and enter the macro **%[DocNumber:5]** in the **Filename** text box:
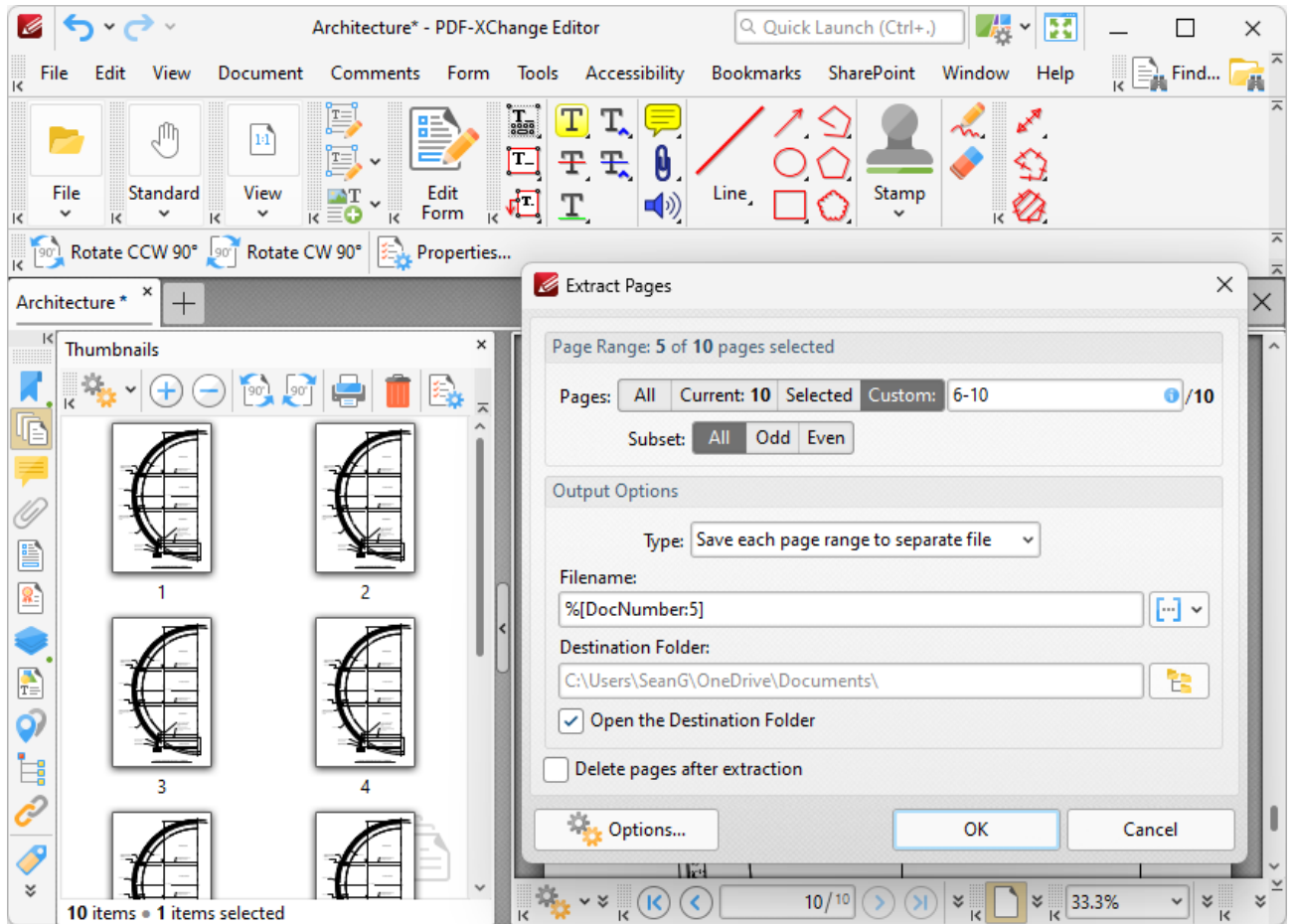
Figure 1. Extract Pages Dialog Box, PDF-XChange Editor Main Window

    4. Click **OK.**

A new document will then be made for each page of the source document. The names of the new documents will be the page numbers of the source pages. The parameter '5' was used, therefore five digits are used for each document title:

Figure 2. %[DocNumber] Macro Example

6.13.11 **Document Info**

Document Info

The **Document Info** macro inserts document metadata information.

The syntax for this macro is **%[DocInfo]** and the following parameters are available:

- **Title** inserts the data in the **Document Title** field.
- **Author** inserts the data in the **Author** field.
- **Subject** inserts the data in the **Subject** field.
- **Keywords** inserts the data in the **Keywords** field.
- **Creator** inserts the name of the application used to create the document.
- **Producer** inserts the **PDF Producer** of the document.
- **CreationDate** inserts the date and time when the document was created, followed by the **UTC offset.**
- **ModDate** inserts the date and time when the document was last modified, followed by the **UTC offset.**

The syntax for this macro when parameters are used is **%[DocInfo:<Parameter>]**

Note that the names of any standard fields from the document properties can be used as parameters for this macro. For example, entering the macro **%[DocInfo:Trapped]** inserts the current value of the **Trapped** field detailed here. 194 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.

Document properties can be viewed/edited in the **Document Properties** dialog box. Click **File** in the **Menu Toolbar** 473 and then click **Document Properties** to view this dialog box:
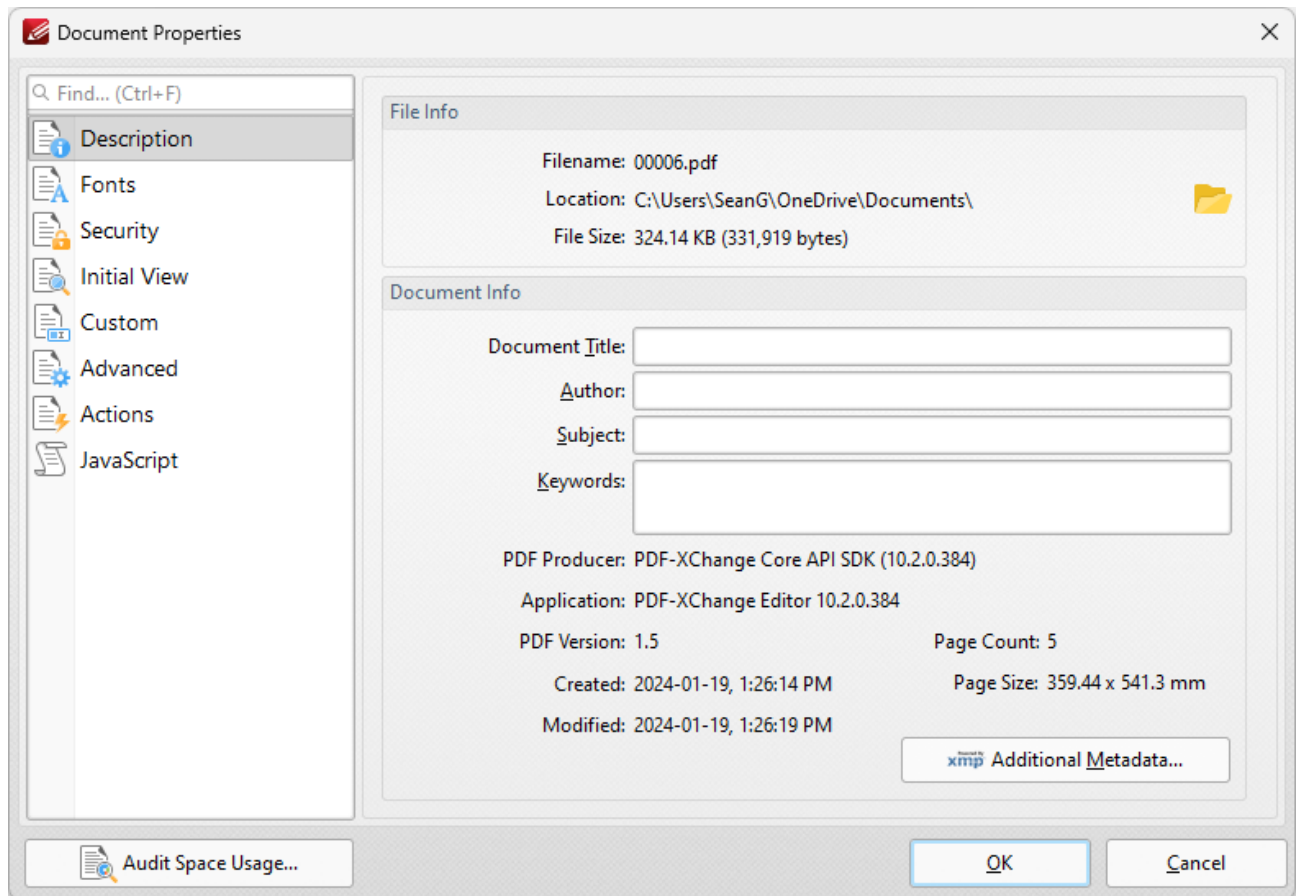
Figure 1. Document Properties Dialog Box

Examples

Follow the steps below to use the **Document Info** macro to add Bates numbering that uses the date and time that the document was last modified:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Bates Numbering** and click **Add.** The **Add Bates Numbering** dialog box will open.

3. Enter **%[DocInfo:ModDate]** in the desired text box. The date and time the document was last modified is then inserted as Bates numbering:
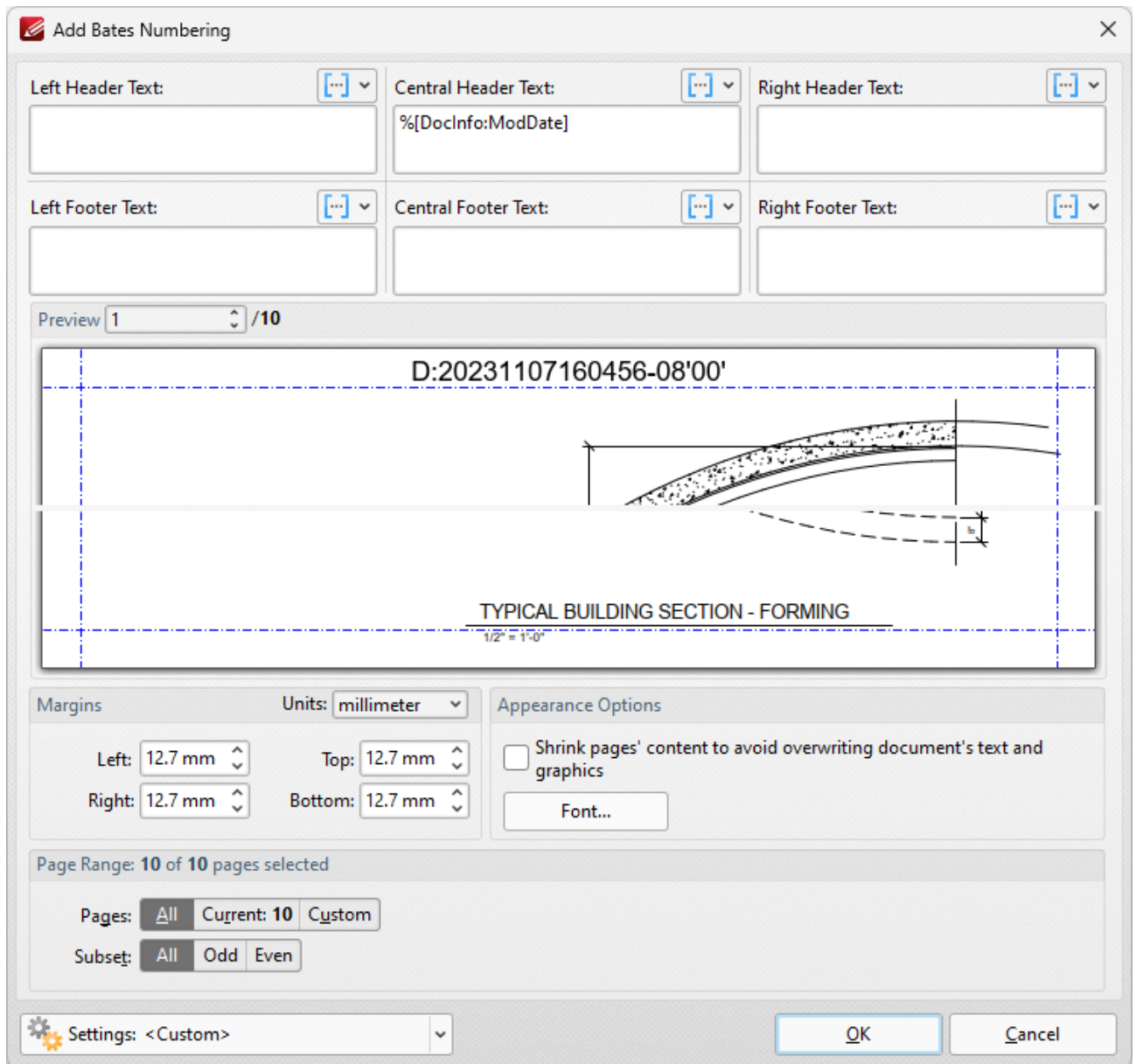
Figure 2. %[DocInfo] Macro Example

Alternatively, enter **%[DocInfo:Title]** to insert the document title:
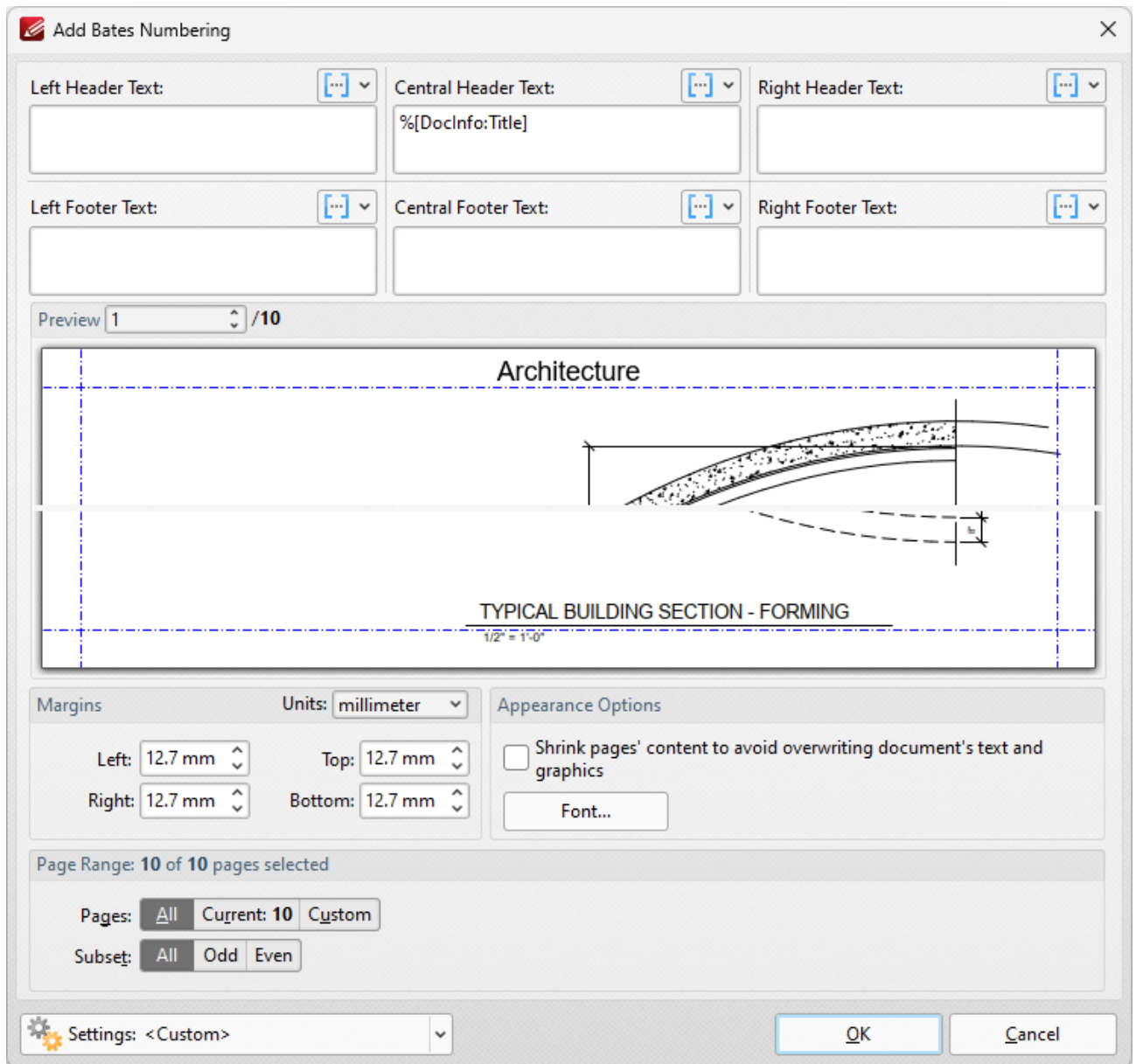
Figure 2. %[DocInfo] Macro Example Two

Note that it is possible to use more than one macro at a time. For example the macro **%[DocInfo:Title], %[DocInfo:Author]** returns both the document name and the author name:
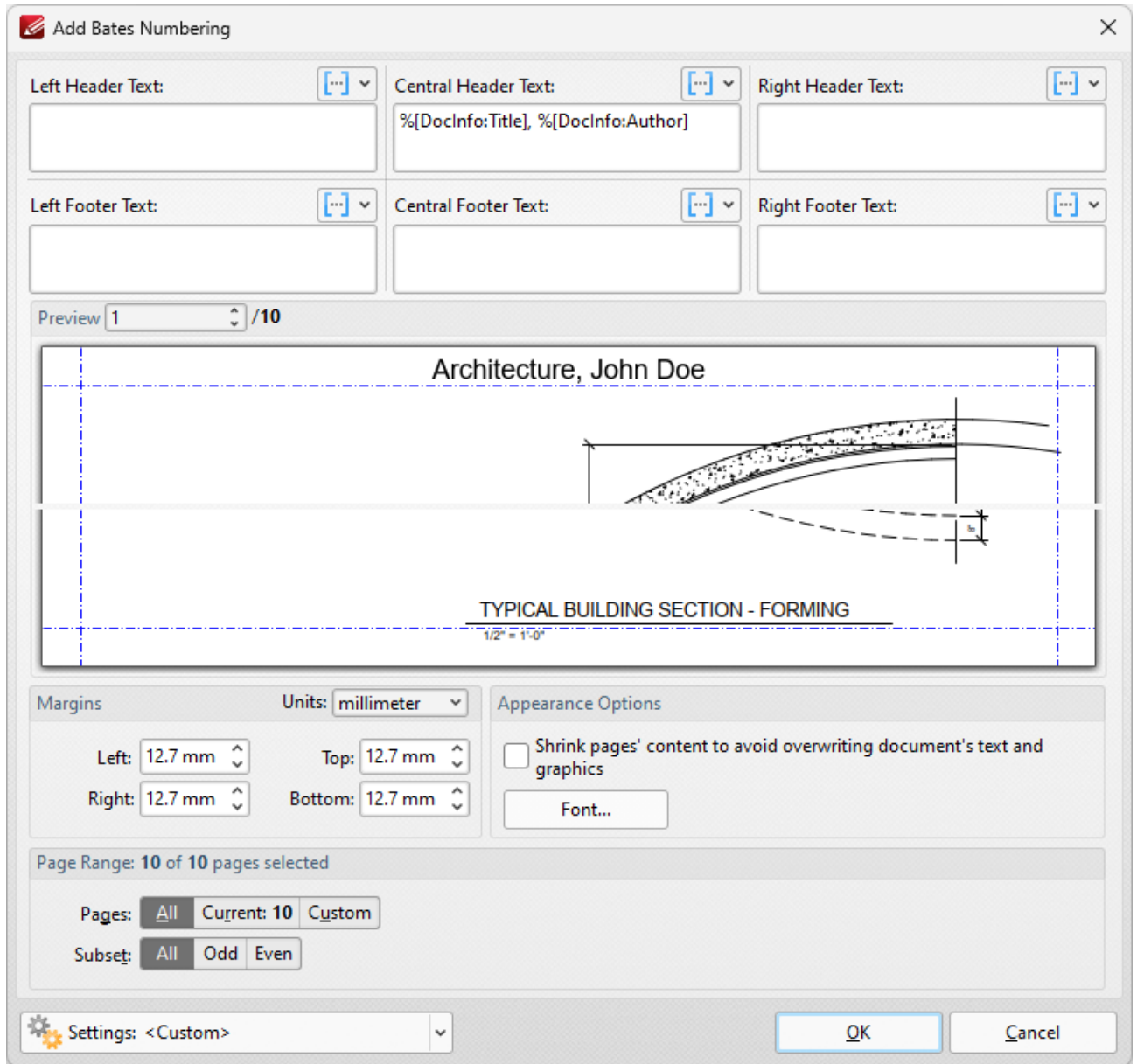
Figure 3. %[DocInfo] Macro Example Three

6.13.12 **Document Title**

Document Title

The **Document Title** macro inserts the document title.

The syntax for the this macro is **%[DocTitle]**

Example

Follow the steps below to use the **Document Title** macro to create a watermark from the document title:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

3. Enter **%[DocTitle]** in the **Text** text box. The document title is then used as the watermark text:
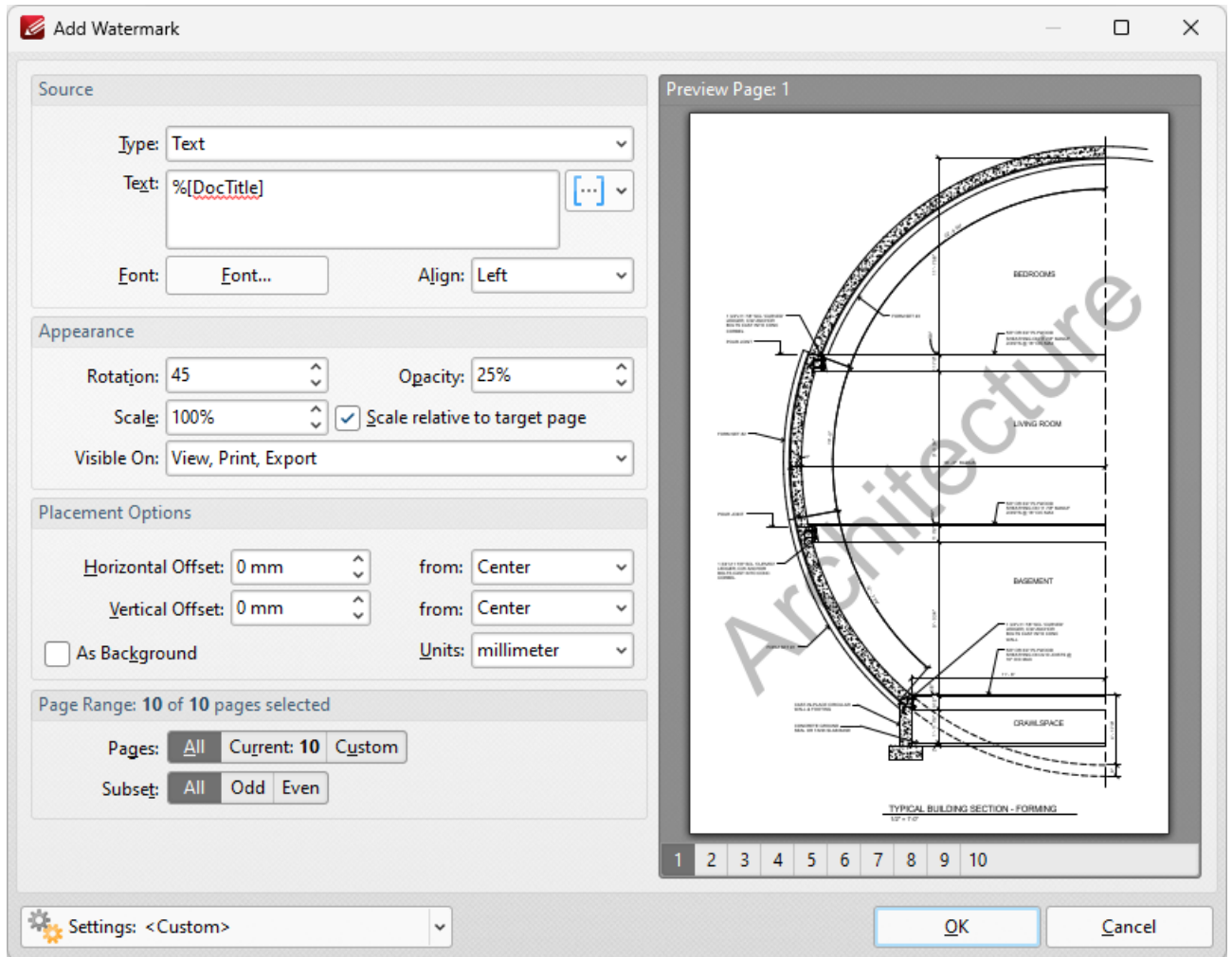
Figure 1. %[DocTitle] Macro Example

6.13.13 Environment Variable

Environment Variable

The **Environment Variable** macro inserts information taken from user-specified environment variables.

The syntax for this macro is **%[Env:<Parameter>]**

Note that a parameter must be used in order for this macro to return information. The following parameters are available:

ALLUSERSPROFILE

Inserts the full path to the *All Users* profile directory.

APPDATA

Inserts the full path to the *Application Data* directory of the current user.

CommonProgramFiles

Inserts the full path to the *Common Files* directory.

CommonProgramFiles(x86)

Inserts the full path to the *(x86) Common Files* directory in 64-bit versions of **Windows.**

CommonProgramFilesW6432

Inserts the full path to the *Common Files* directory in 64-bit versions of **Windows.**

COMPUTERNAME

Inserts the computer name.

HOMEDRIVE

Inserts the drive letter on the local computer that is connected to the user's home directory.

HOMEPATH

Inserts the complete path of the current user's *Home* directory, as defined by the user's account properties.

LOCALAPPDATA

Inserts the complete path to the current user's *Application Data* directory.

LOGONSERVER

Inserts the name of the domain controller that authenticated the client's logon request.

OS

Inserts the name of the operating system.

PROCESSOR_ARCHITECTURE

Inserts the chip architecture of the CPU.

ProgramData

Inserts the full path to the *All Users* profile directory.

ProgramFiles

Inserts the full path to the *Program Files* directory.

ProgramFiles(x86)

Inserts the full path to the *(x86) Program Files* directory in 64-bit versions of **Windows.**

ProgramFilesW6432

Inserts the full path to the *Program Files* directory in 64-bit versions of **Windows.**

PUBLIC

Inserts the full path to the *Public* directory.

SESSIONNAME

Inserts the session name and number when a client is connected via a terminal server.

SystemDrive

Inserts the name of the drive on which the system folder was placed.

SystemRoot

Inserts the name of the system folder.

TEMP

Inserts the name of the default temporary folder used by the operating system and applications available to the current user.

TMP

Inserts the name of the default temporary folder used by the operating system and applications available to the current user. (Note that some applications require the **TEMP** environment variable, whilst others require **TMP.** The values for both should be identical).

USERDOMAIN

Inserts the name of the user domain that contains the account of the current user.

USERDOMAIN_ROAMINGPROFILE

Inserts the name of the user domain for RDS or standard roaming profile paths.

USERNAME

Inserts the name of the current user.

USERPROFILE

Inserts the location of the current user's profile directory.

windir

Inserts the full path to the *Windows* directory.

Example

%[Env:CommonProgramFiles] inserts the full path to the *Common Files* directory:
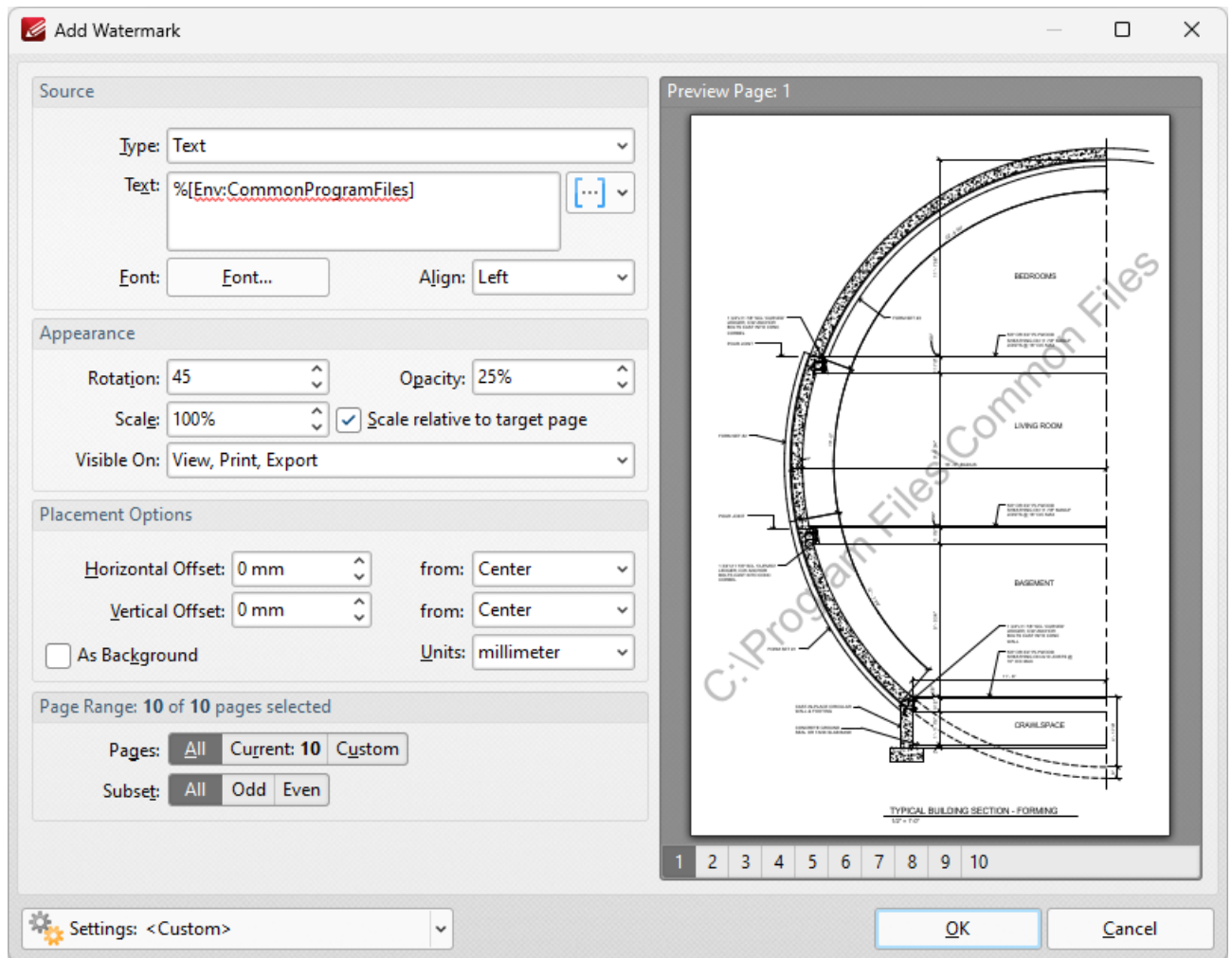
Figure 1. [Env:CommonProgramFiles] Macro Example

Further information on environment variables is available **here.**

6.13.14 **FileName**

 FileName

The **FileName** macro inserts the name of the source file.

The syntax for this macro is **%[FileName:range]**

The **'range'** parameter is optional and can be used to specify a section of the filename as desired. Available options for this parameter are detailed below:

- Character numbers separated by a comma. For example: **%[FileName:1,3,5,7]** outputs the first, third, fifth and seventh characters of the filename.
- Character ranges (i.e. indexes in the range separated with a dash). For example: **%[FileName:2-6]** outputs the second to the sixth characters of the filename.
- A dash followed by a character number. This outputs the characters of the filename up to the specified character. For example: **%[FileName:-5]** outputs the first five characters of the filename.
- A character number followed by a dash. This outputs all characters of the filename from the specified character. For example: **%[FileName:5-]** outputs all characters from the fifth character of the filename.

Example

Follow the steps below to use the **FileName** macro to insert the name of the source file as the stamp title when creating a new stamp:

1. Click **Stamp** in the **Shortcut Toolbar,** 71 then click **Stamps Palette.** The **Stamps Palette** will open.

2. Click **Add New,** then click **Add New Stamp from File:**
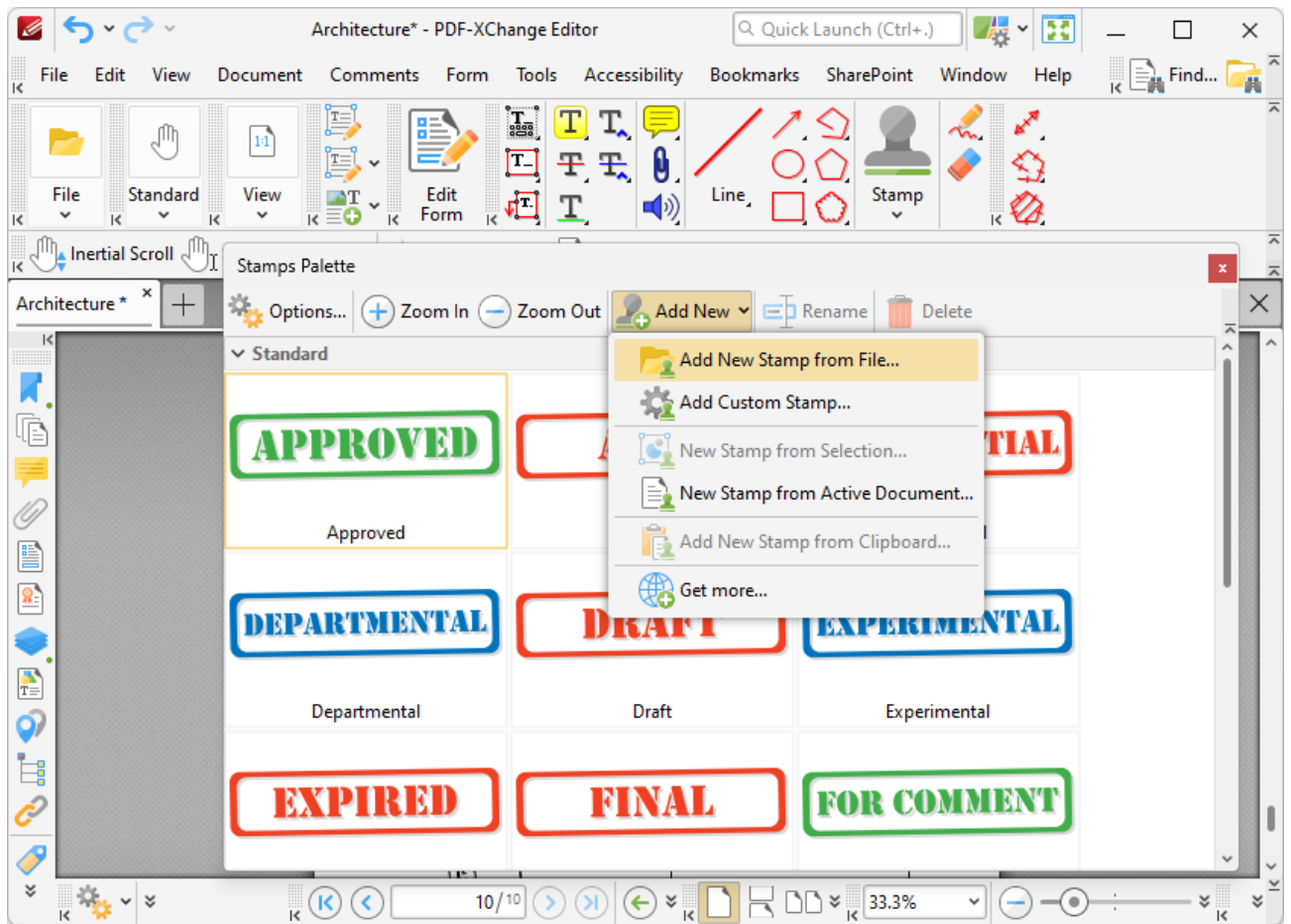
Figure 1. Stamps Palette, Add New Stamp From File

The **Open Files** dialog box will open.

3. Select a file to use as the stamp and then click **Open.** The **Add New Stamp** dialog box will open.

4. Enter **%[FileName]** in the **Stamp Title** dialog box and select a target collection:

Figure 2. Add New Stamp Dialog Box

5. Click **OK.**

A new stamp will then be created and the name of the source file will be used as the title:
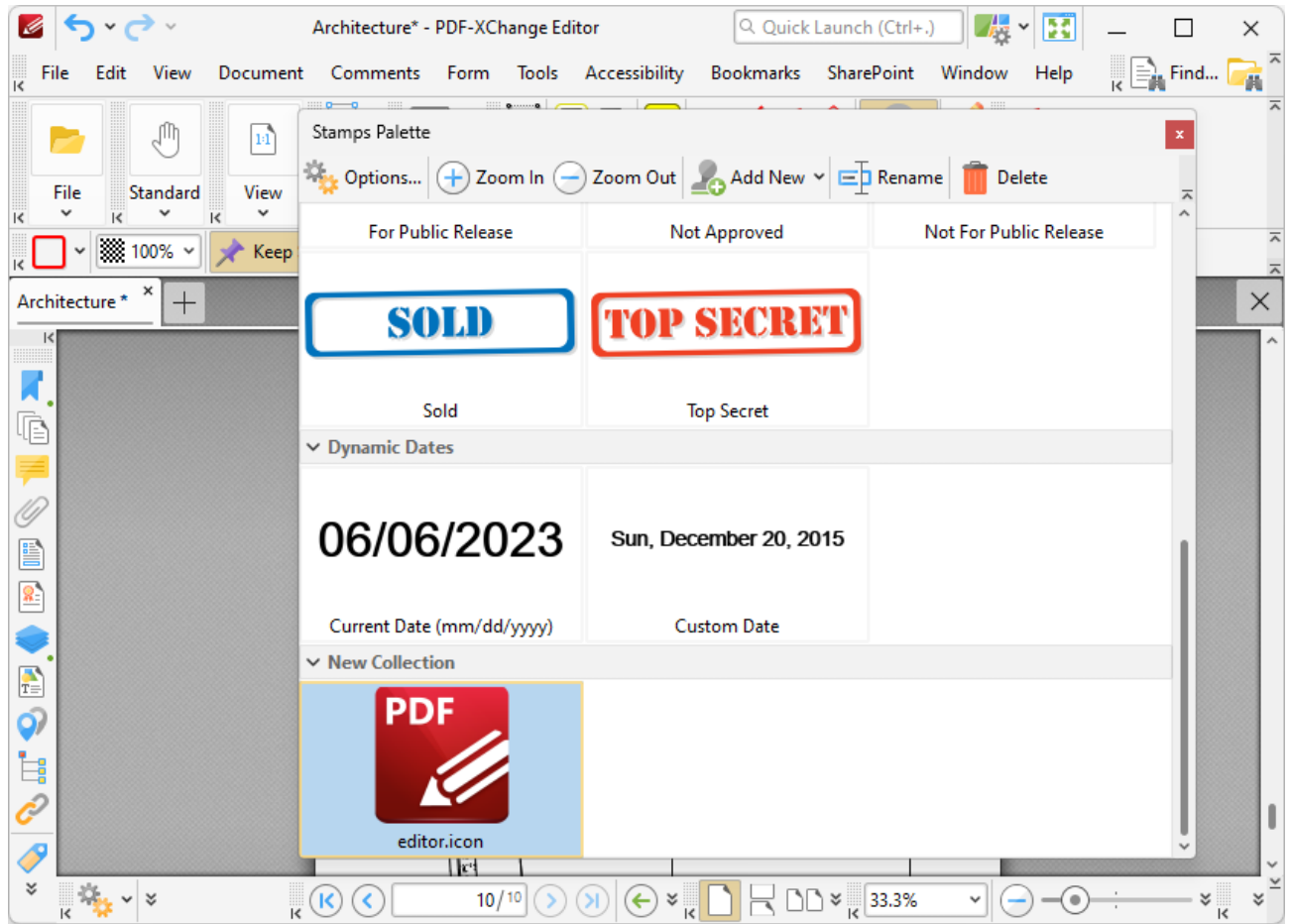
Figure 3. New Stamp

6.13.15 **File Extension**

File Extension

The **File Extension** macro inserts the file extension of the current file.

The syntax for this macro is **%[FileExt]**

Example

Follow the steps below to use the **File Extension** macro to insert the file extension of the current file when adding a header to documents:

1. Click **Document** in the **Menu Toolbar.** [473]

2. Hover over **Header and Footer,** and the click **Add.** The **Add Header and Footer** dialog box will open.

3. Enter **%[FileExt]** in one of the header/footer text boxes. The file extension of the file is then inserted as a header:
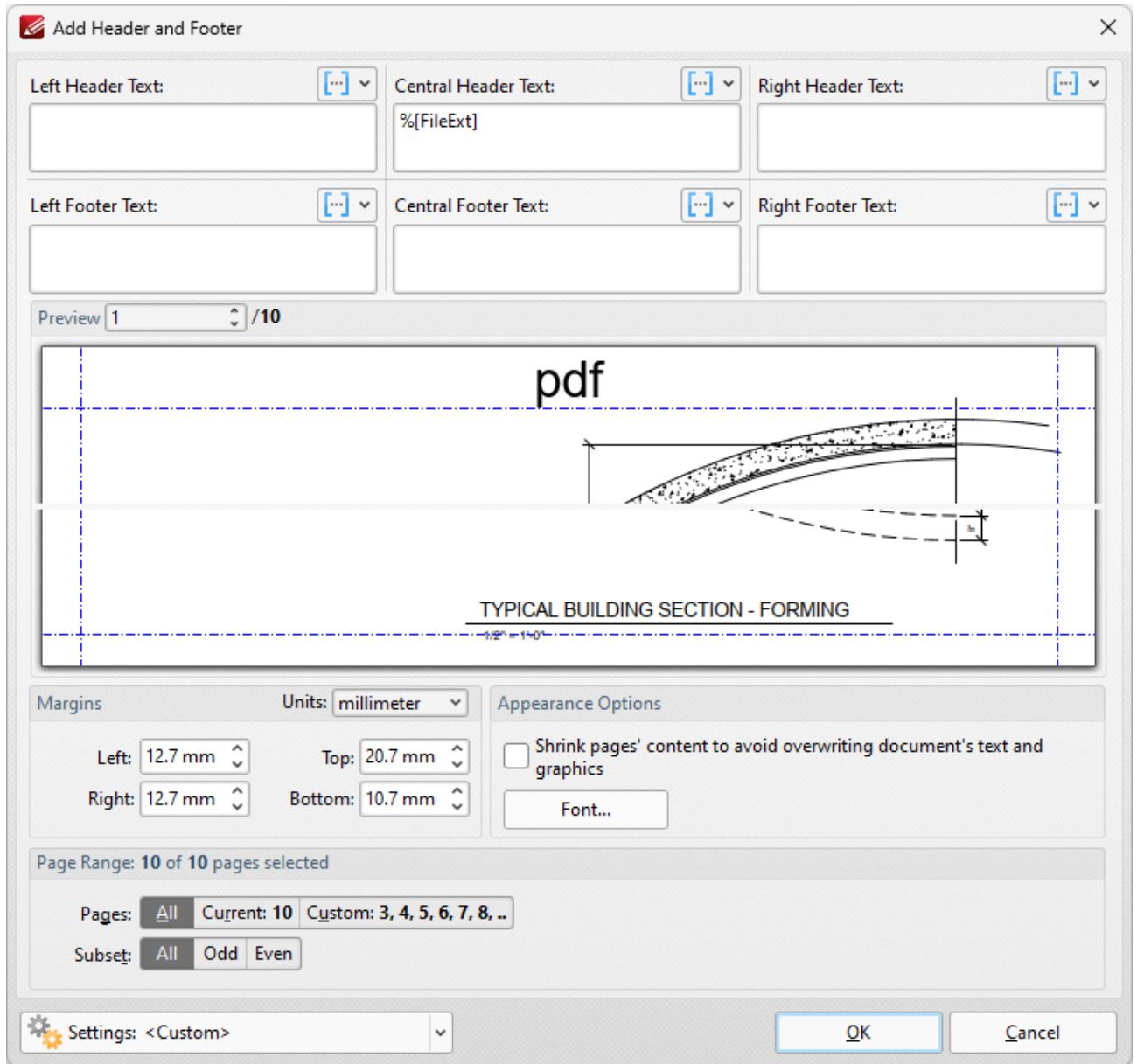
Figure 1. %[FileExt] Macro Example

6.13.16   File to Open

File to Open

The **File to Open** macro inserts the name of the file in bookmark actions that involve the opening of a file.

The syntax for this macro is **%[File]**

Example

Follow the steps below to use the **File to Open** macro to insert the name of the file specified in the associated bookmark action when adding text to bookmark titles:

1. Open a document that contains bookmarks (including a bookmark with an **Open a File** action) in **PDF-XChange Editor.** For example, in the following document, "**Bookmark A"** contains an **Open a File** action and the associated document is **"Sample Form.pdf":**
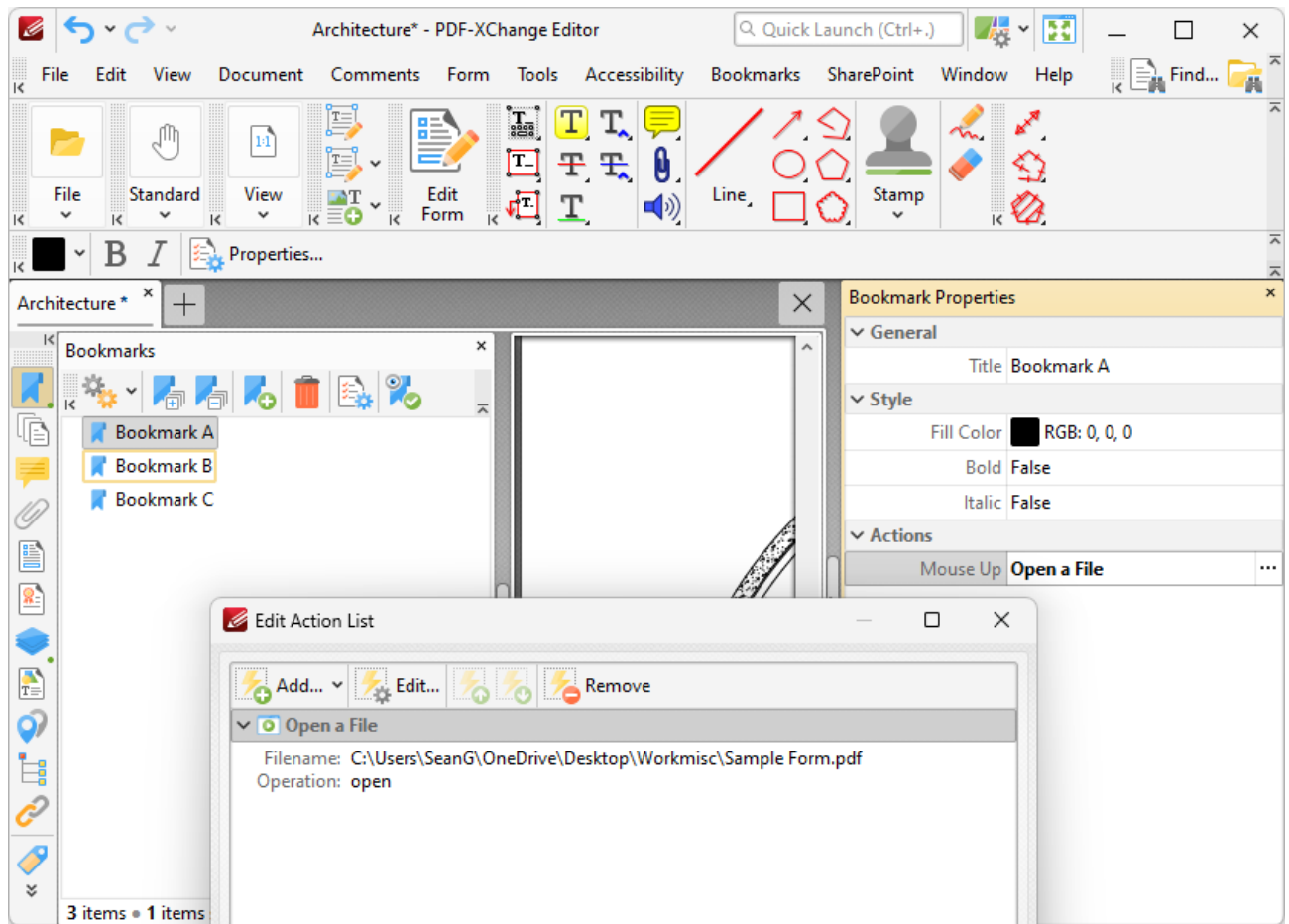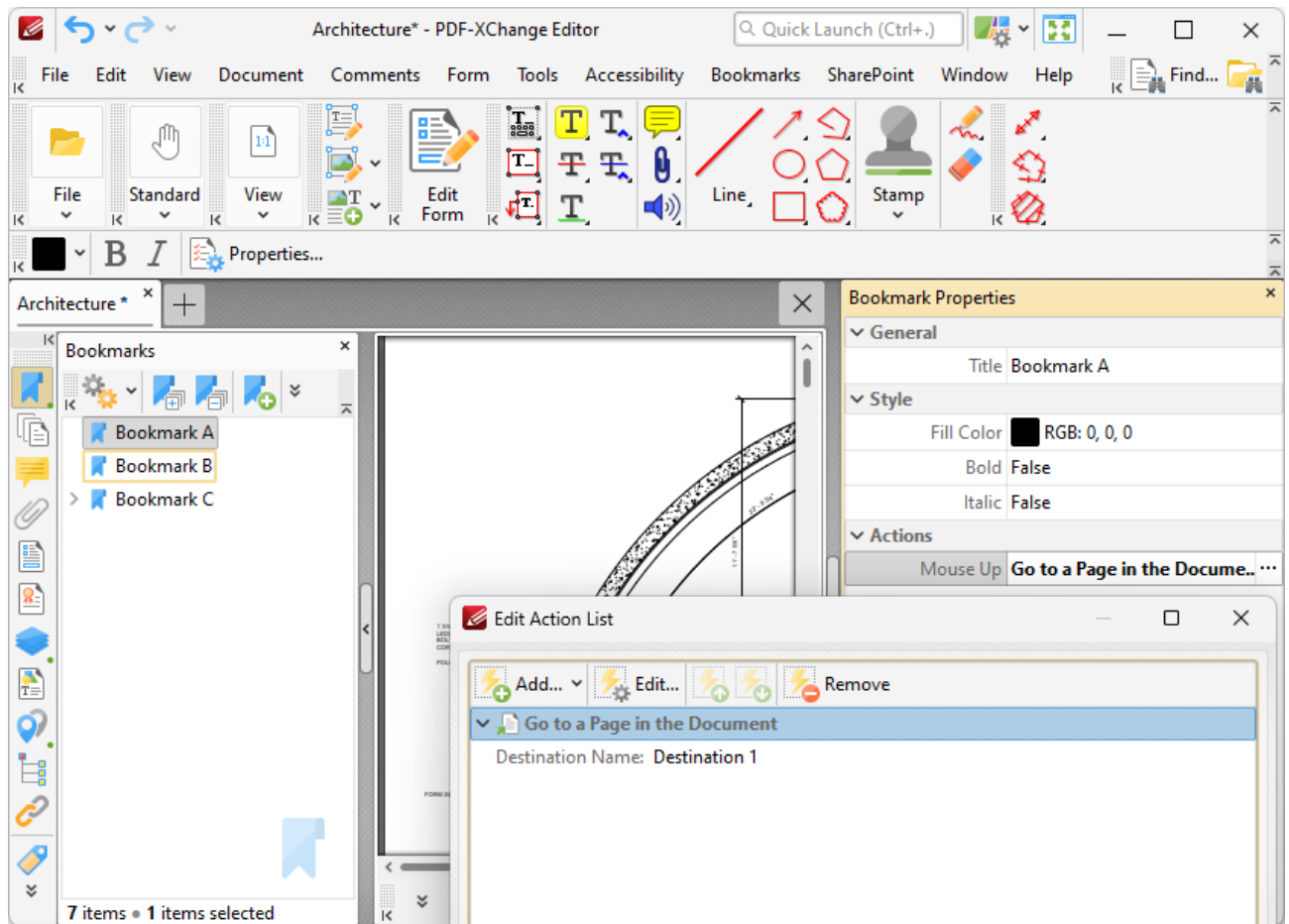
Figure 1. Edit Action List for 'Bookmark A'

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

3. Add the **%[File]** macro to the **Add Suffix** text box:
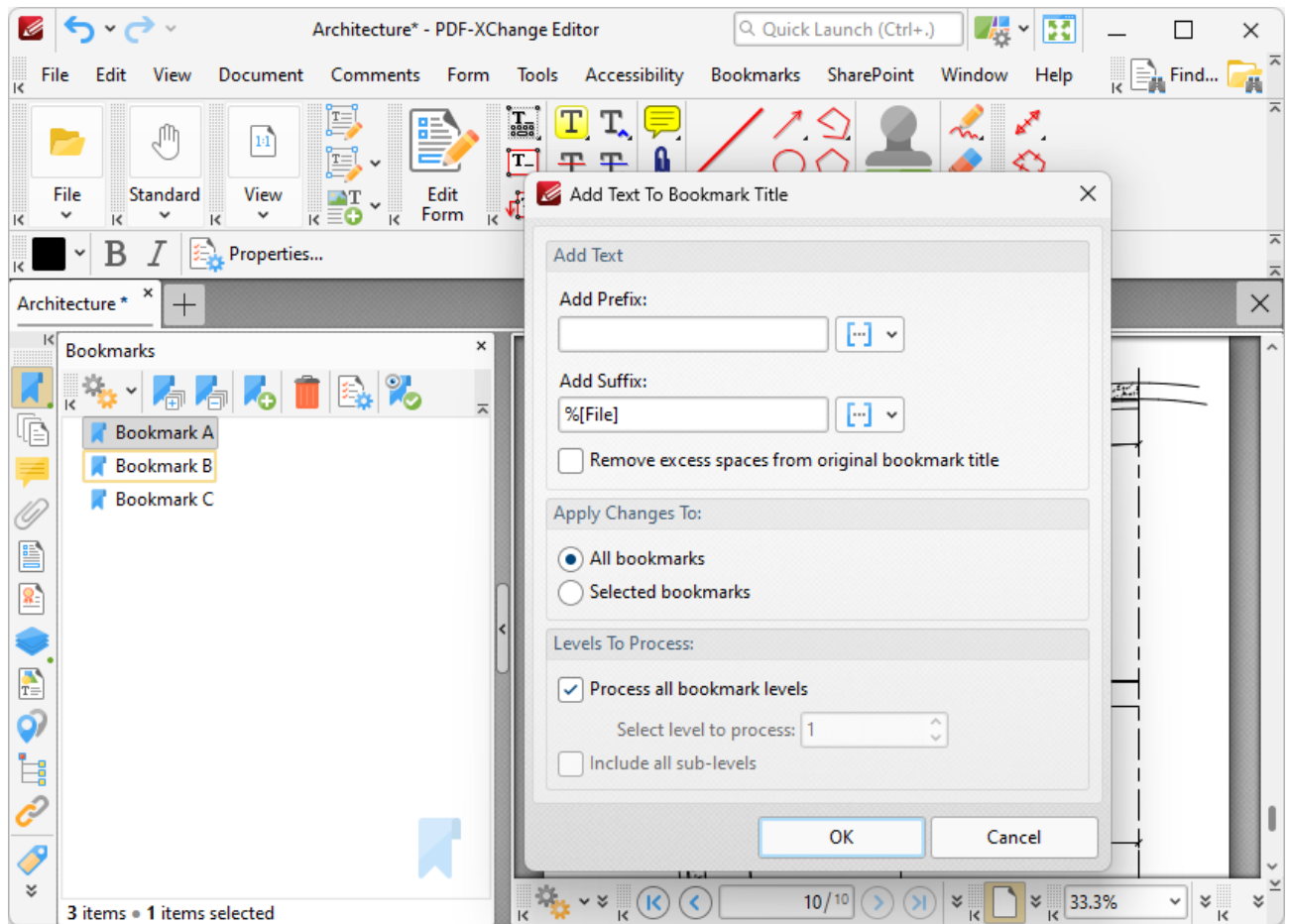
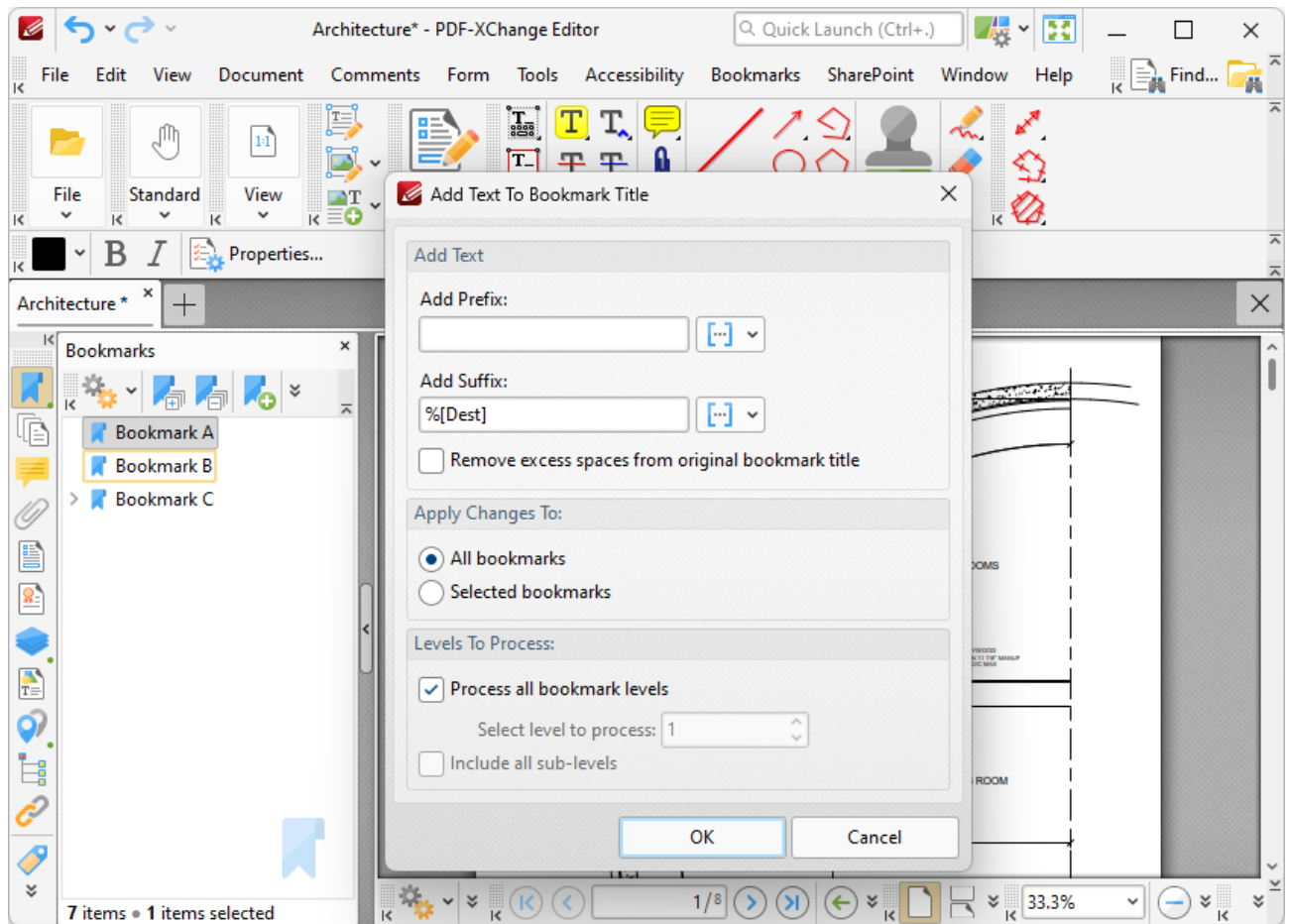**Figure 2.** Add Text To Bookmark Title Dialog Box, %[File] Macro Used as Suffix

4. Click **OK.** The name of the file in the **Open a File** bookmark action is then added to the bookmark title:
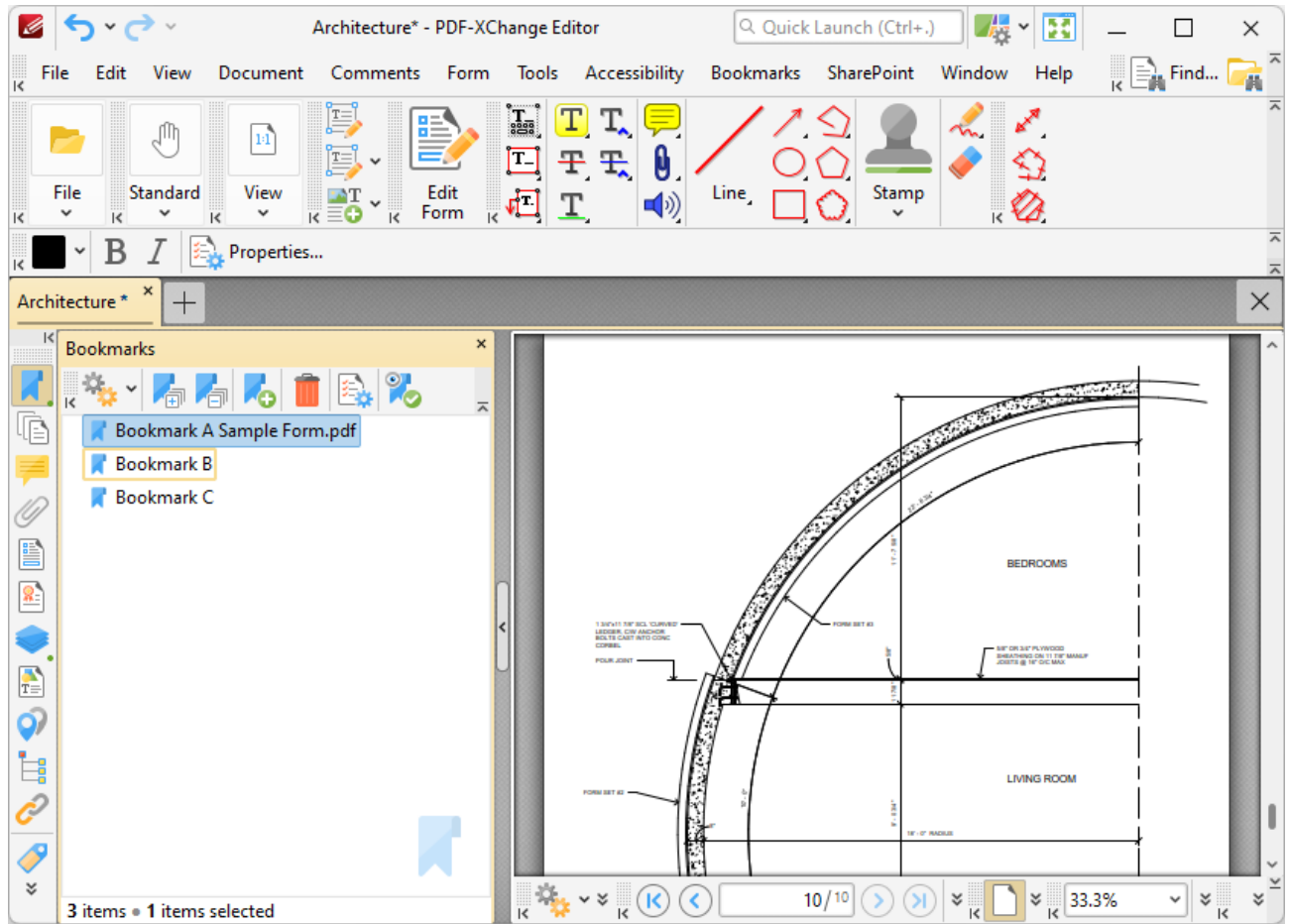
Figure 3. Bookmark Title Updated to Include Name of File to Open

6.13.17 **Folder Name**

![PDF-XChange Editor logo] **Folder Name**

The **Folder Name** macro inserts the path of the folder that contains the source file. Note that folder names end with a backslash when local files are used.

The syntax for this macro is **%[FolderName]**

Example

Follow the steps below to use the **Folder Name** macro to insert the path of the folder that contains the source file when a new watermark is created:

1. Click **Document** in the **Menu Toolbar.**

2. Hover over **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

3. Enter **%[FolderName]** in the **Text** text box. The path of the folder that contains the source file is then used as the watermark text:
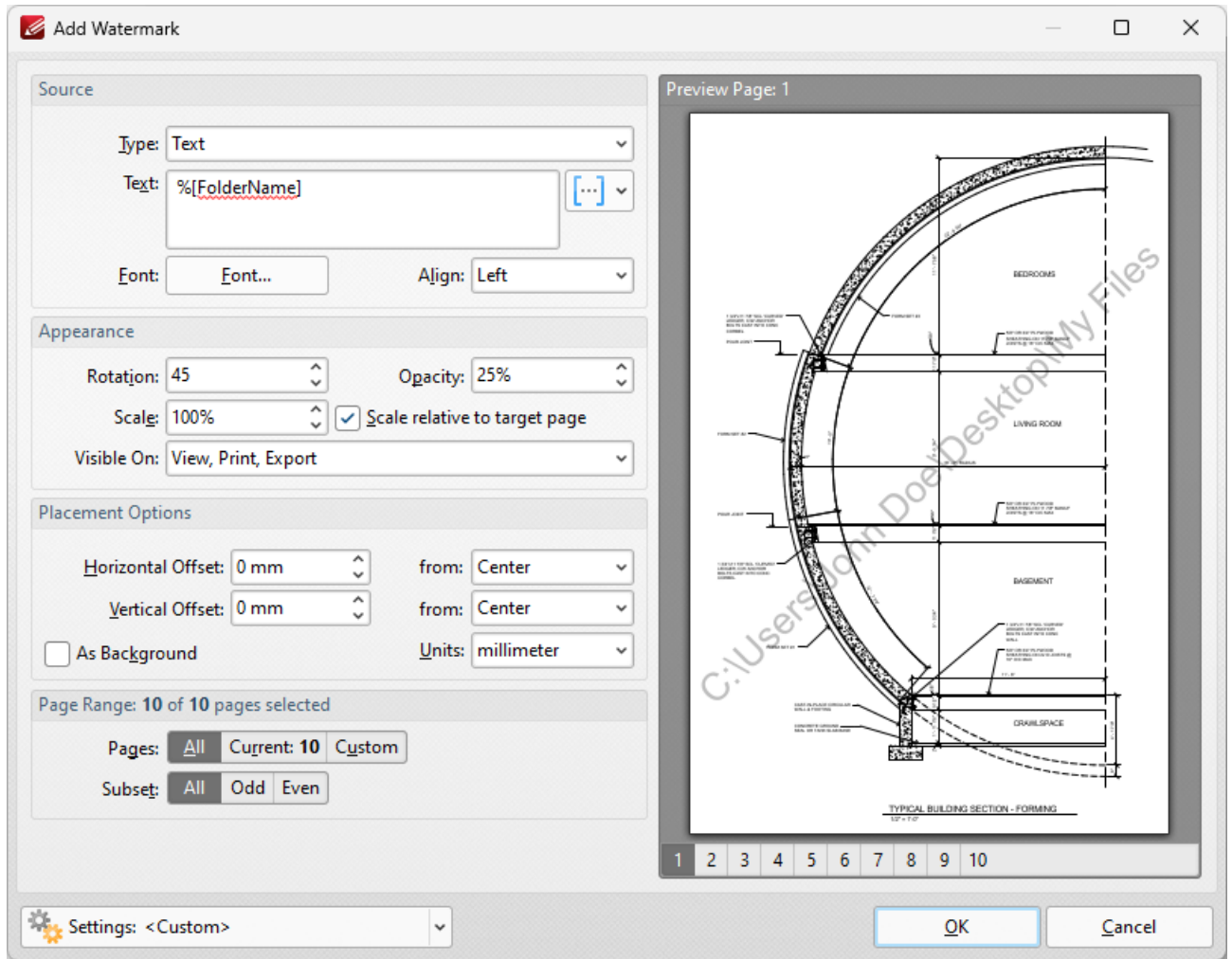
Figure 1. %[FolderName] Macro Example

6.13.18 **Folder Title**

Folder Title

The **Folder Title** macro inserts the title of the folder that contains the source file.

The syntax for this macro is **%[FolderTitle]**

Example

Follow the steps below to use the **Folder Name** macro to insert the path of the folder that contains the source file when a new watermark is created:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

3. Enter **%[FolderTitle]** in the **Text** text box. The path of the folder that contains the source file is then used as the watermark text:
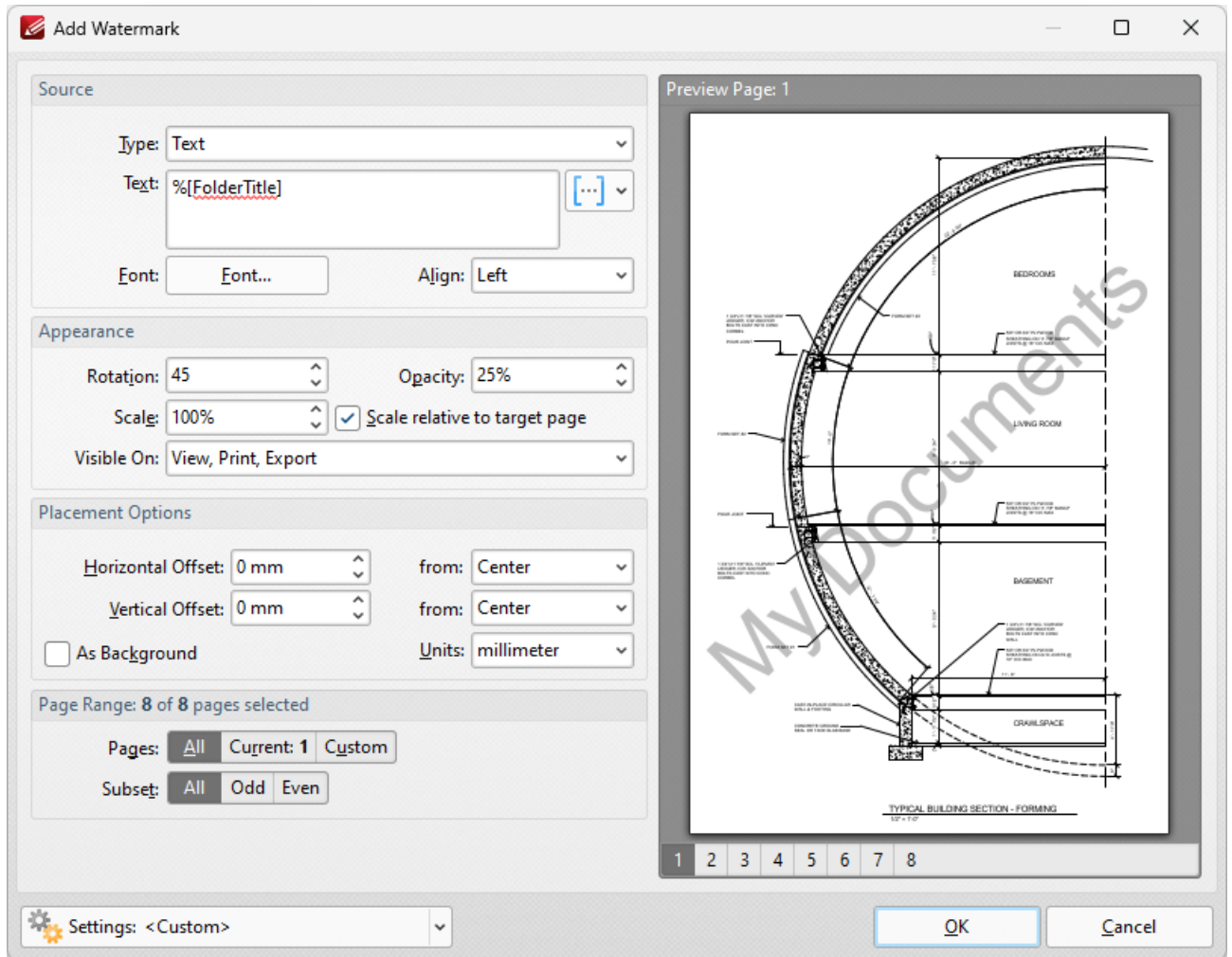
Figure 1. %[FolderTitle] Macro Example

6.13.19 **Hierarchical Index**

Hierarchical Index

The **Hierarchical Index** macro inserts the hierarchical order of bookmarks.

The syntax for this macro is **%[HierIndex]**

Example

Follow the steps below to use the **Hierarchical Index** macro to insert the hierarchical order of bookmarks when adding text to bookmark titles:

1. Open a document that contains bookmarks in **PDF-XChange Editor.**

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

3. Enter **%[HierIndex]** in the **Add Suffix** text box:
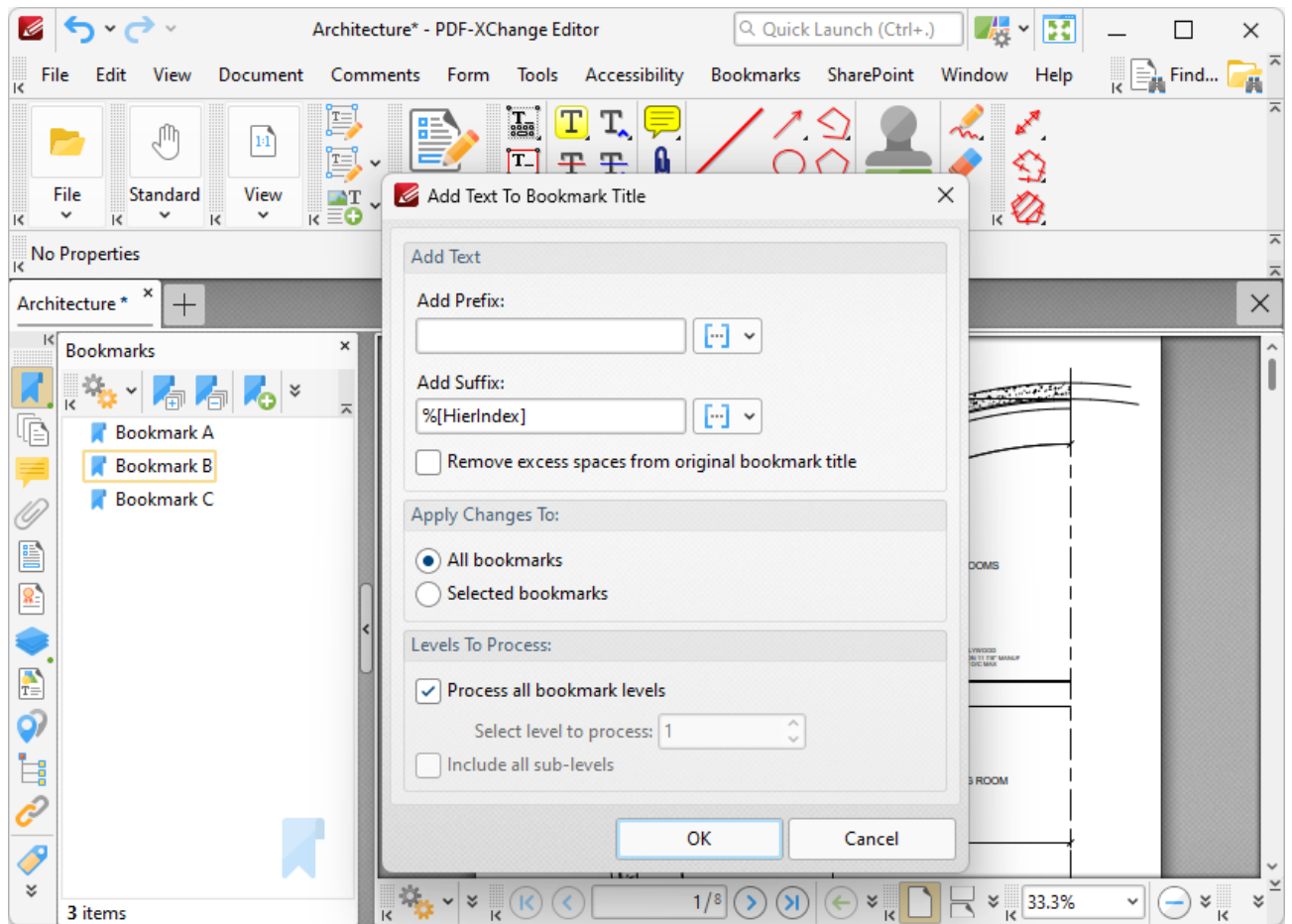
Figure 1. %[HierIndex] Macro Example

4. Click **OK.** The hierarchical index of bookmarks will then be added as a suffix to all bookmark titles:
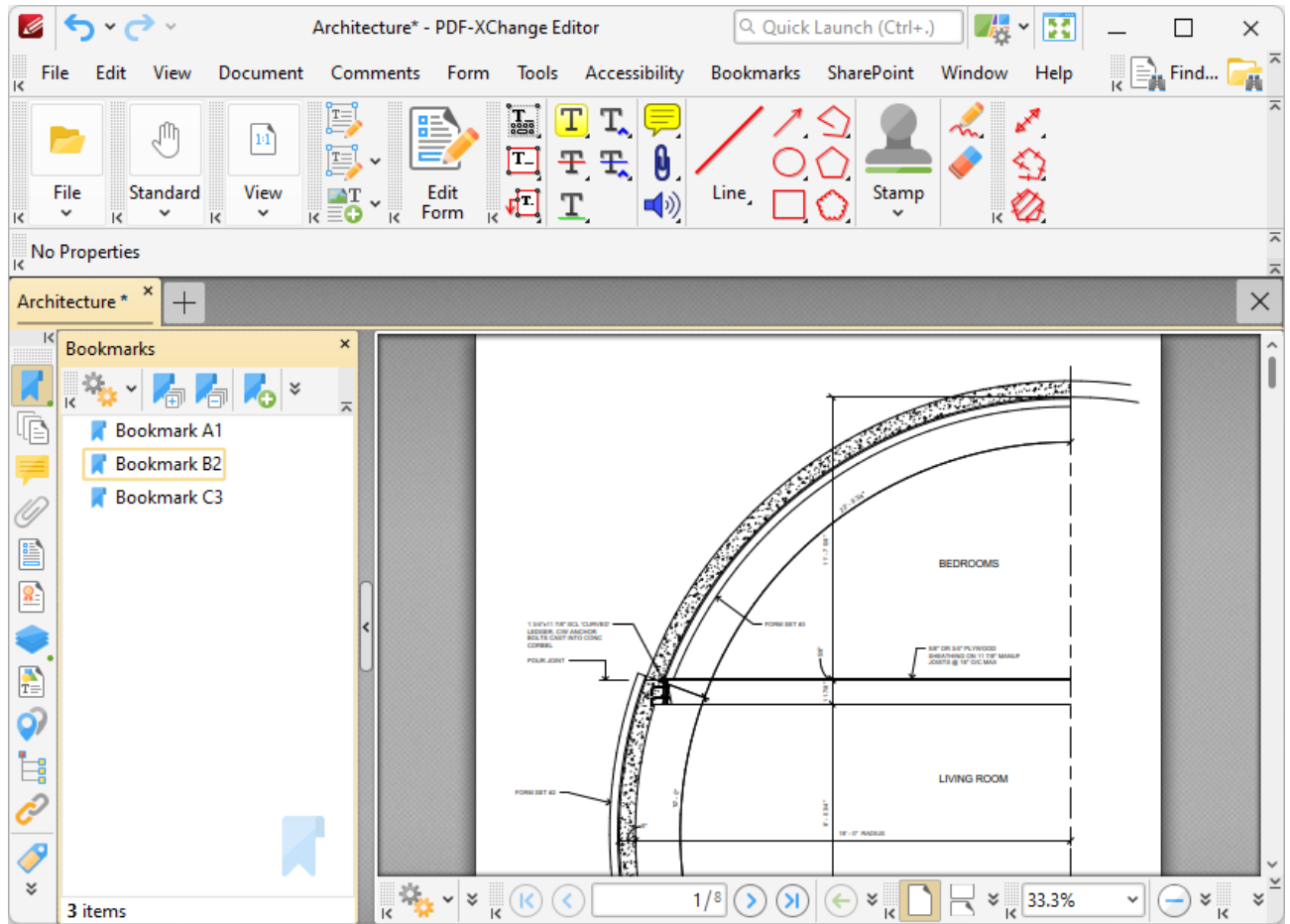
Figure 2. %[HierIndex] Macro Output Example

6.13.20 **Hour**

Hour

The **Hour** macro inserts the hour value from the current time.

The syntax for this macro is **%[Hour]**

Example

If the current time is 12:34 then the **%[Hour]** macro inserts '16':
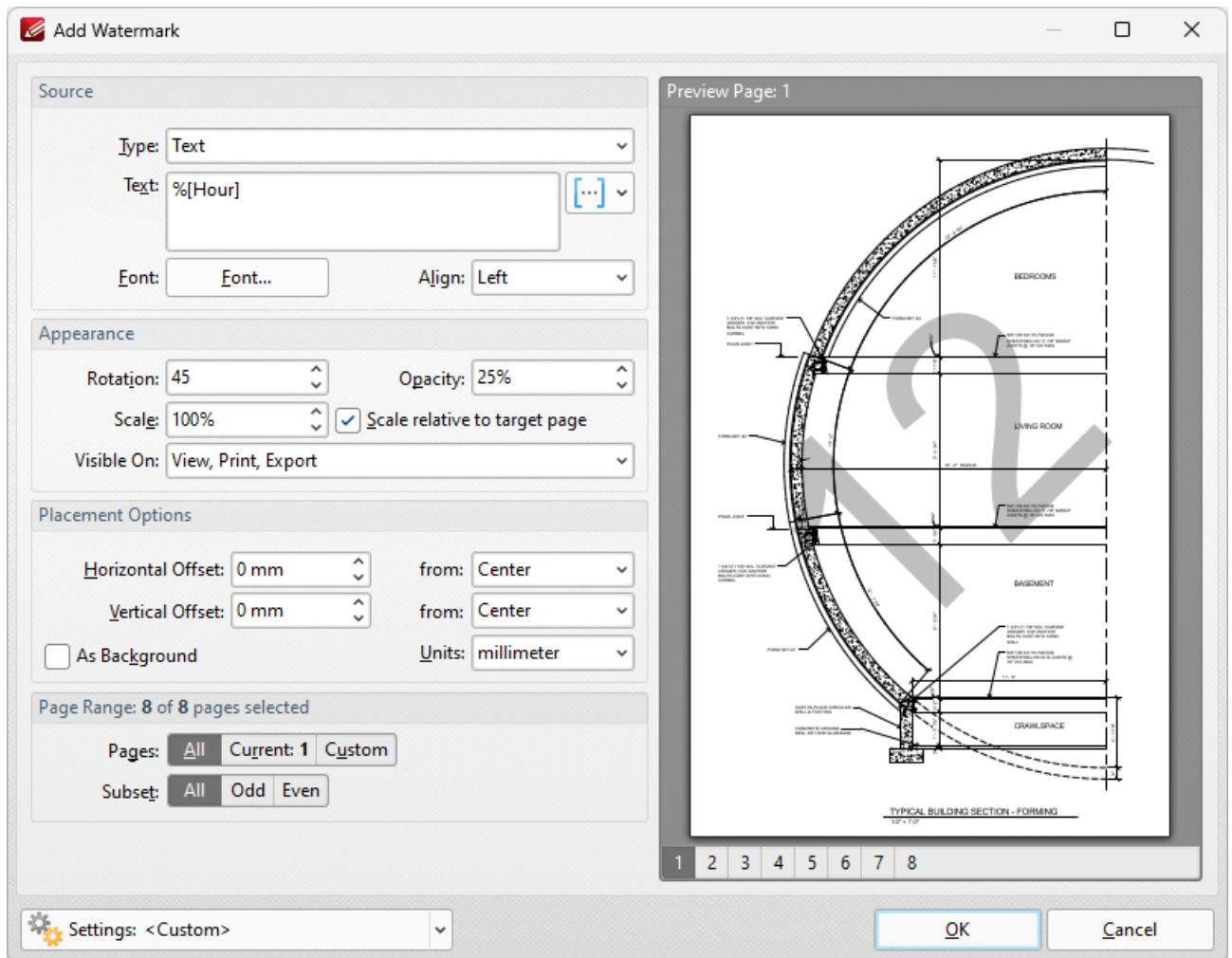
Figure 1. %[Hour] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Hour]:%[Minute]** output the hour followed by the minutes of the hour:
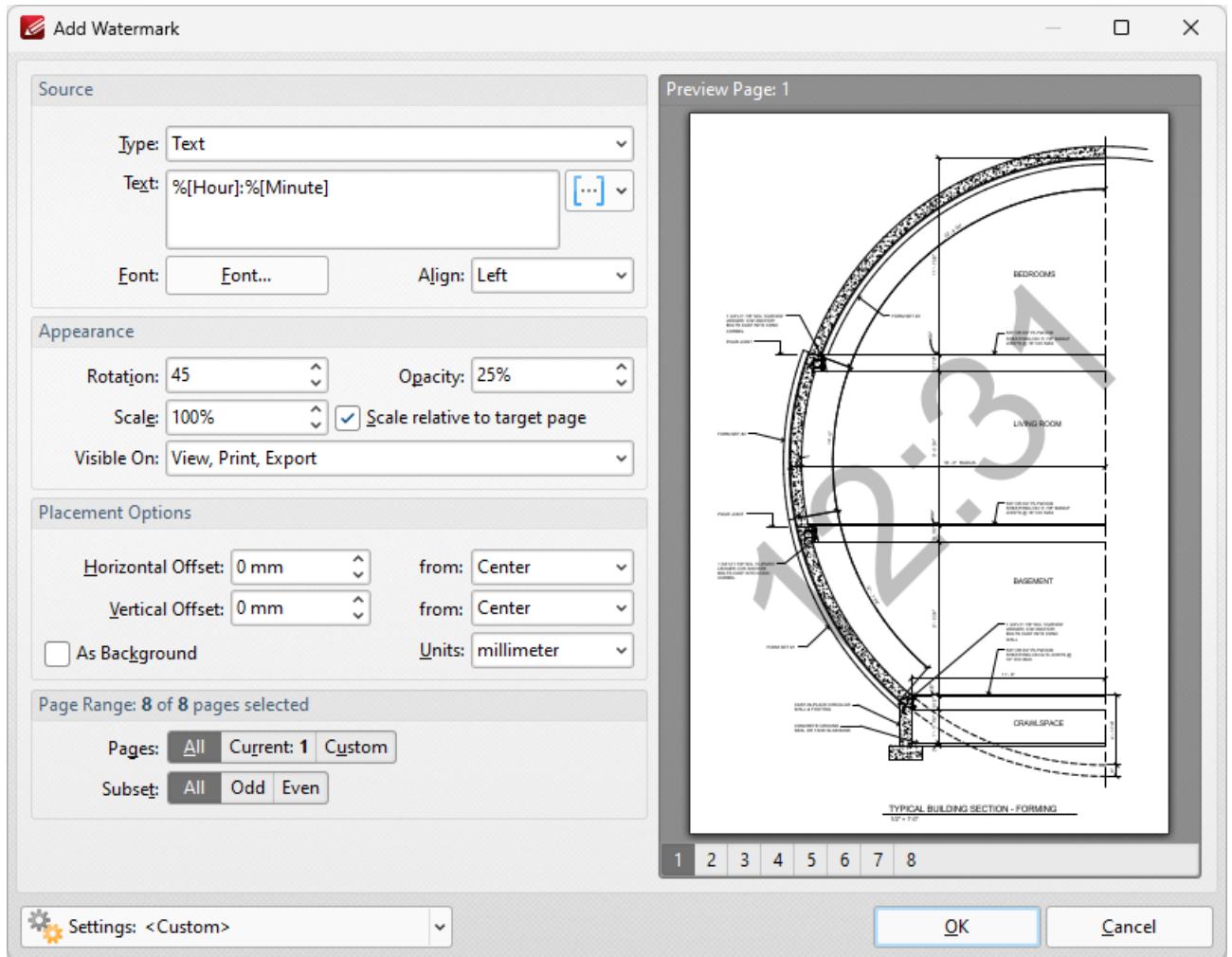
Figure 2. %[Hour] Combined Macro Example

6.13.21 **Index in Parent**

Index in Parent

The **Index in Parent** macro inserts the index of bookmarks in relation to their parent bookmark.

The syntax for this macro is **%[IndexInPar]**

Example

Follow the steps below to use the **Index in Parent** macro to insert the index of bookmarks in relation to their parent bookmark when adding text to bookmark titles:

1. Open a document that contains bookmarks in **PDF-XChange Editor.**

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

3. Enter **%[IndexInPar]** in the **Add Suffix** text box:
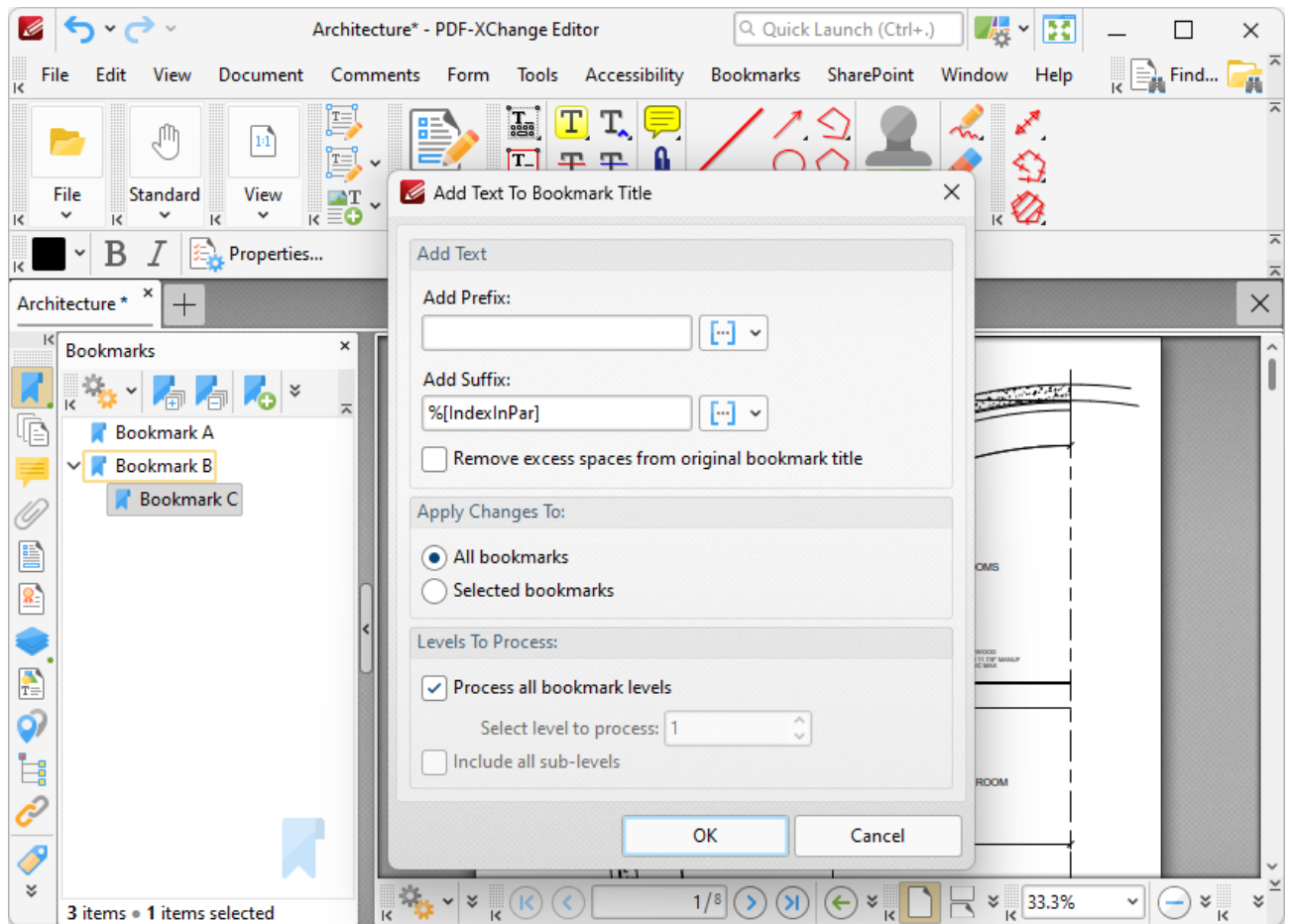
Figure 1. %[IndexInPar] Macro Example

4. Click **OK.** The index of bookmarks in relation to their parent bookmark will then be added as a suffix to all bookmark titles:
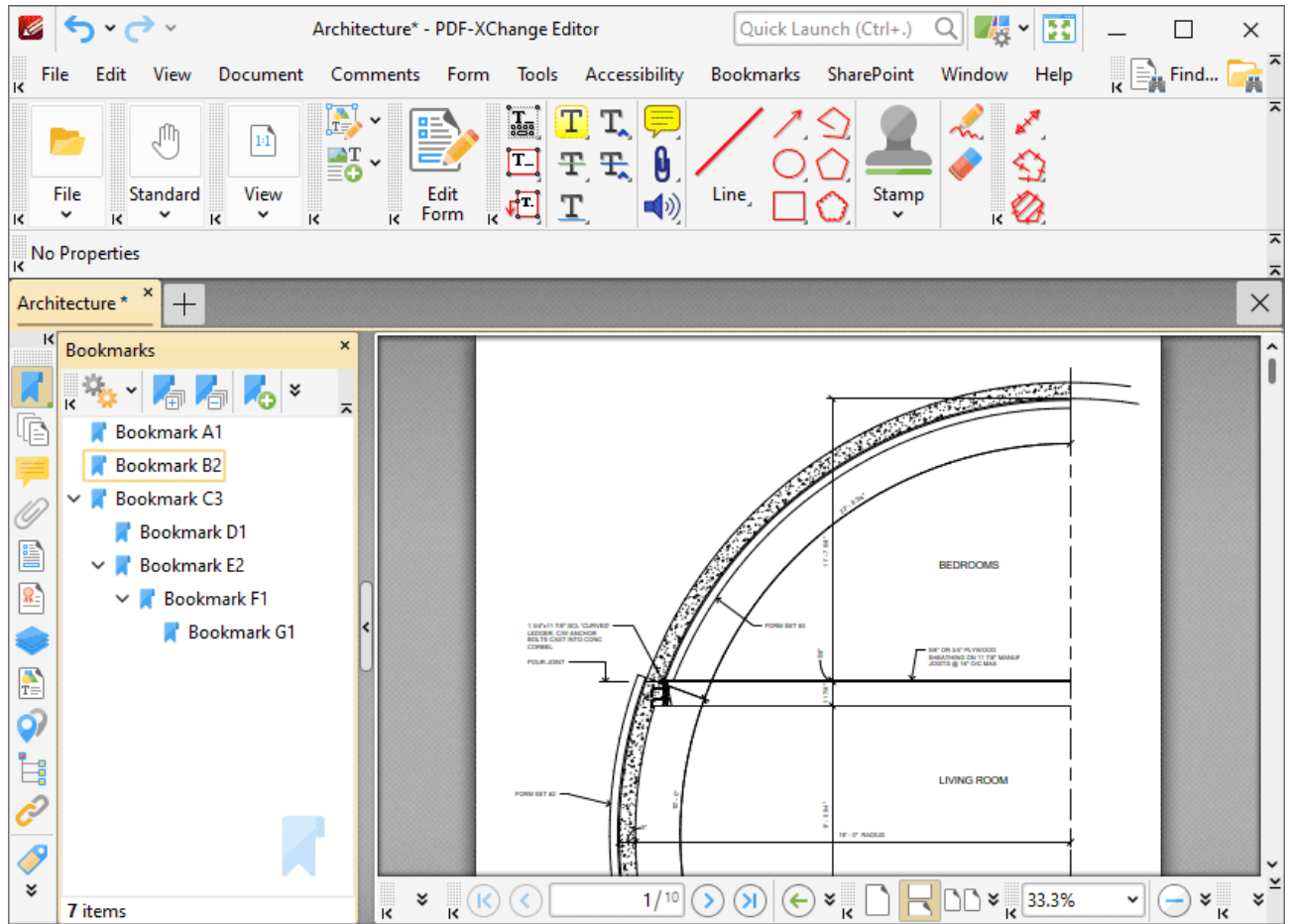
Figure 2. %[IndexInPar] Macro Output Example

6.13.22 **Minute**

Minute

The **Minute** macro inserts the minute value from the current time.

The syntax for this macro is **%[Minute]**

Example

If the current time is 16:30 then the **%[Minute]** macro inserts '40':
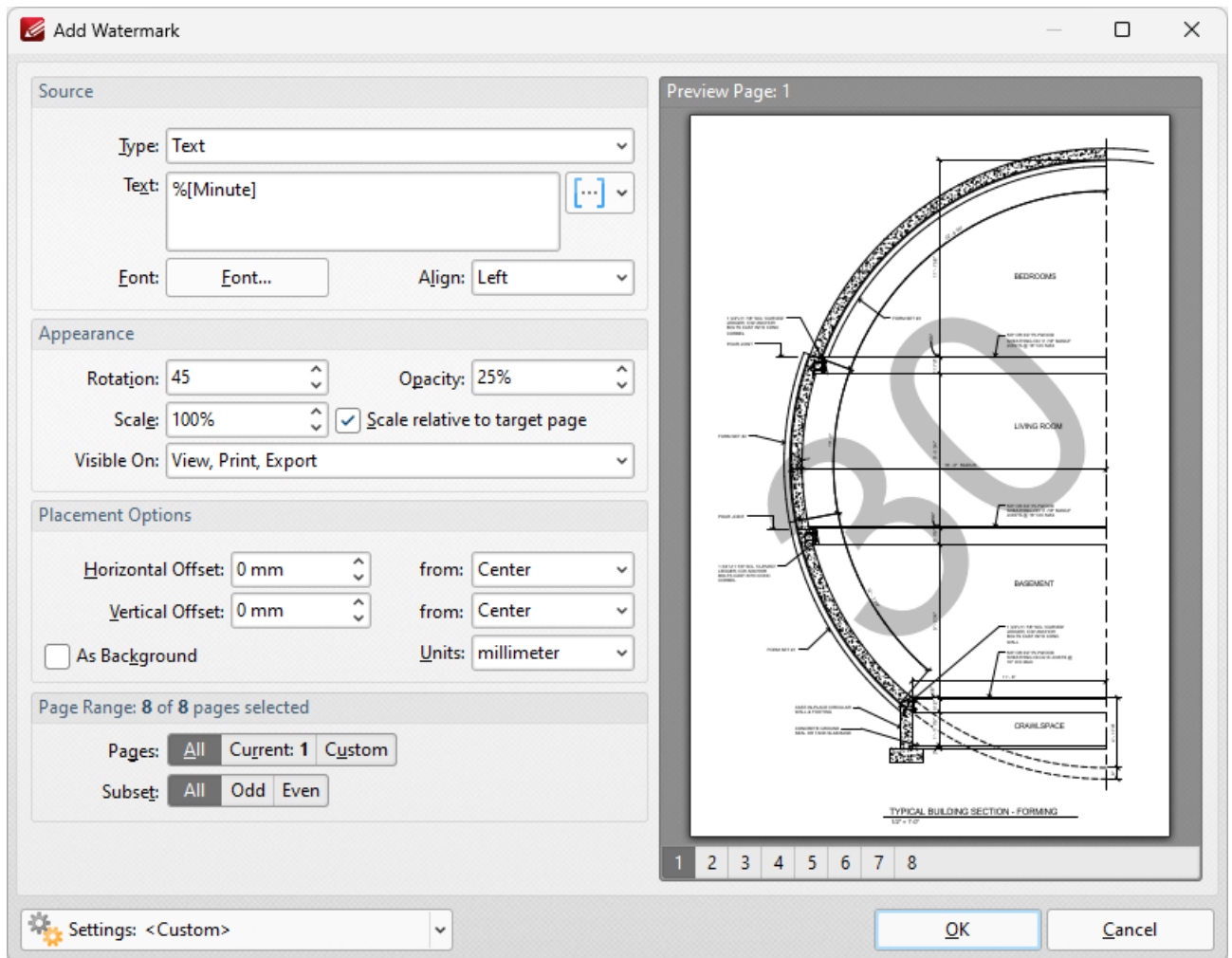
Figure 1. %[Minute] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Hour]:%[Minute]** output the hour followed by the minutes of the hour:
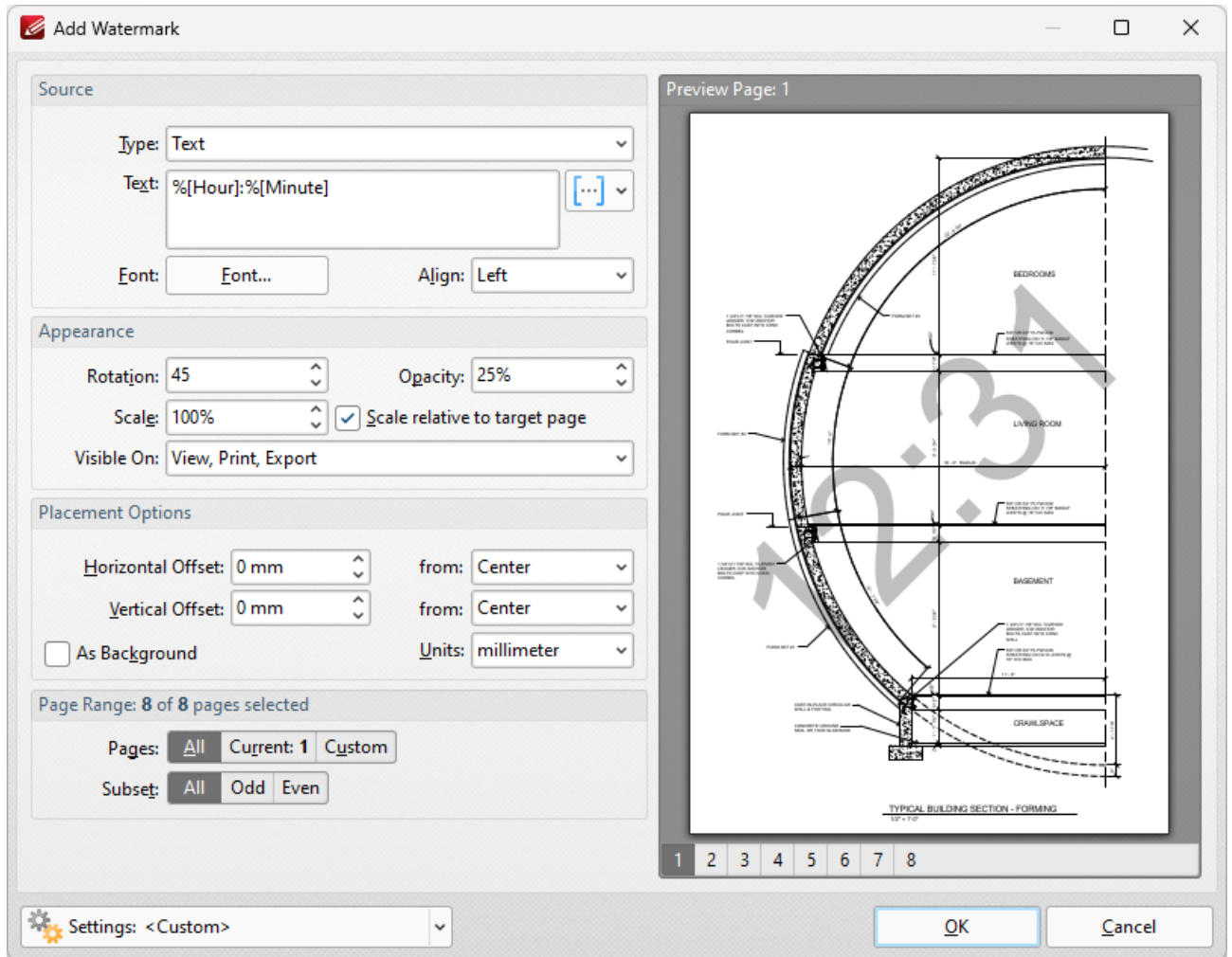
Figure 2. %[Minute] Combined Macro Example

6.13.23 **Month**

Month

The **Month** macro inserts the current month as a numerical value from 1-12.

The syntax for this macro is **%[Month]**

Example

If the current month is February then the **%[Month]** macro inserts "04":
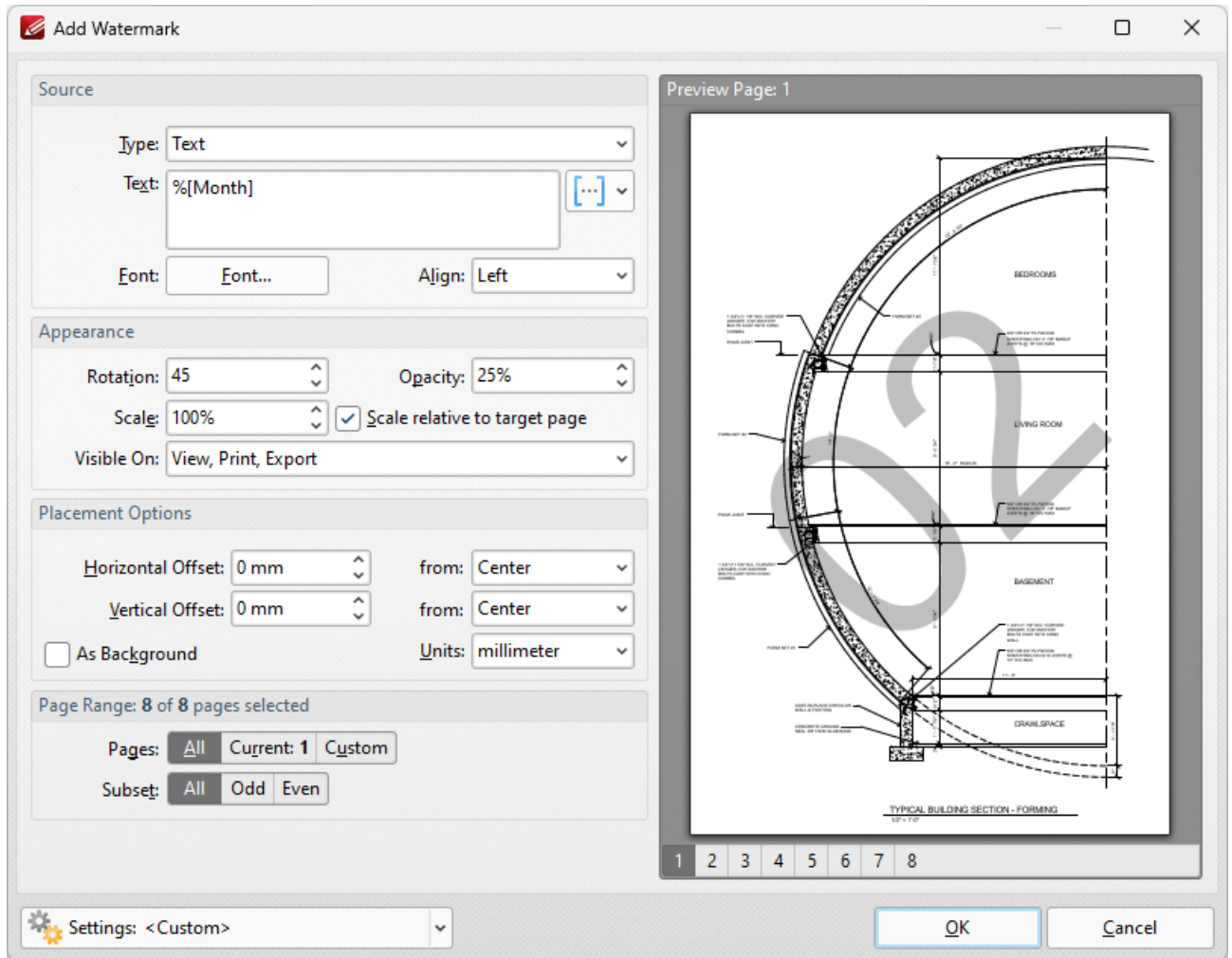
Figure 1. %[Month] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Time:H:mm] %[Month]/%[Day]** output the current time followed by the month and the day of the month:
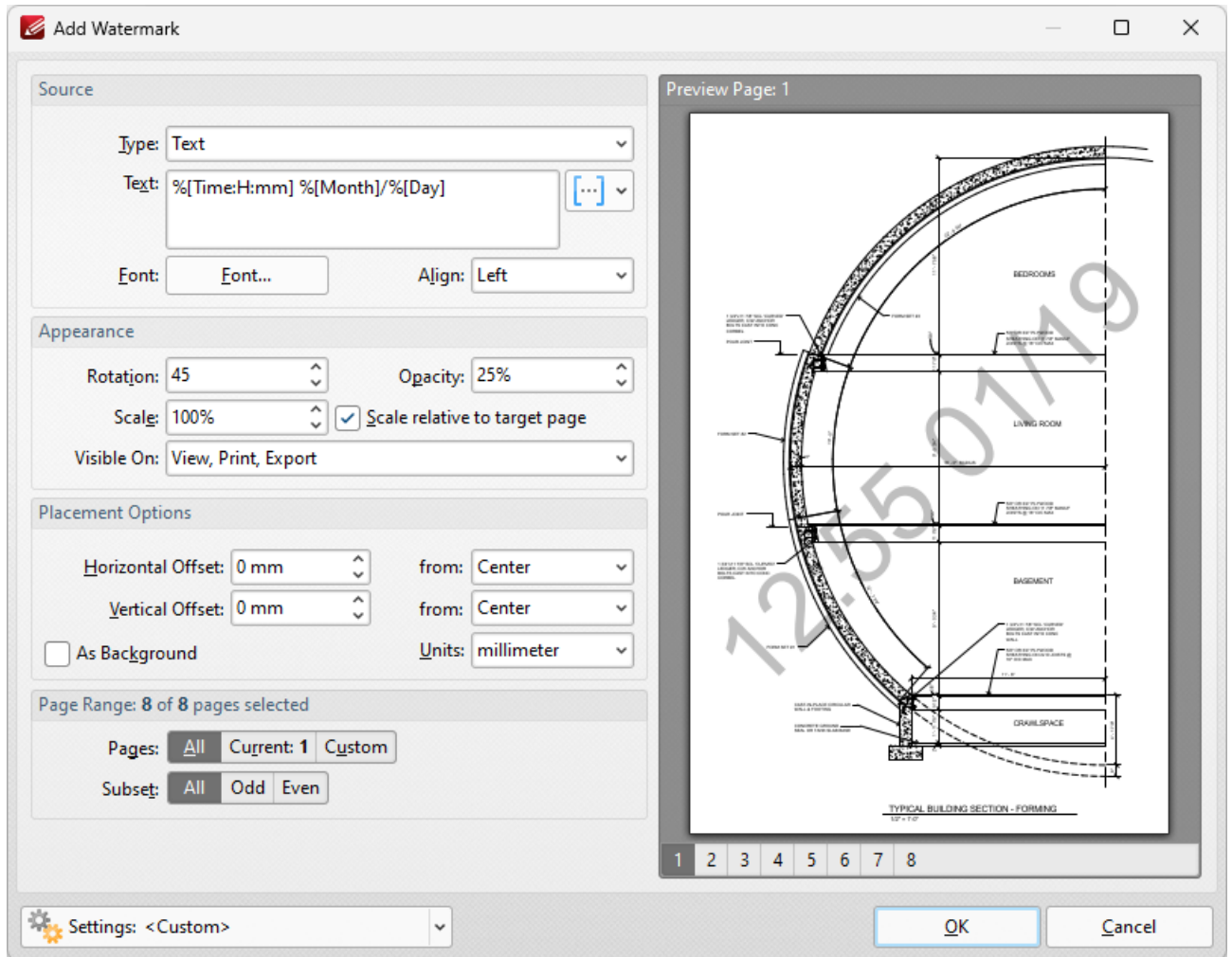
Figure 2. %[Month] Combined Macro Example

6.13.24 Named Destination

 Named Destination

The **Named Destination** macro inserts name of the named destination in bookmark actions that involve the opening of a named destination.

The syntax for this macro is **%[Dest]**

Example

Follow the steps below to use the **Named Destination** macro to insert the name of the named destination specified in the associated bookmark action when adding text to bookmark titles:

> 1. Open a document that contains bookmarks (including a bookmark with a **Named Destination** action) in **PDF-XChange Editor.** For example, in the following document, "**Bookmark A"** contains a **Named Destination** goto action and the associated named destination is **"Destination 1":**

Figure 1. Edit Action List for 'Bookmark A'

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

3. Add the **%[Dest]** macro to the **Add Suffix** text box:

Figure 2. Add Text To Bookmark Title Dialog Box, %[Dest] Macro Used as Suffix

4. Click **OK.** The name of the named destination in the bookmark action is then added to the bookmark title:

Figure 3. Bookmark Title Updated to Include Named Destination Title

6.13.25   **Number of Pages**

Number of Pages

The **Number of Pages** macro inserts the total number of document pages.

The syntax for this macro is **%[Pages]** and the following parameters are available:

- **'r'** specifies the use of lower-case roman numerals.
- **'R'** specifies the use of upper-case roman numerals.
- **'L'** specifies page labels as the page numbering format in cases where page labels have been specified. If page labels have not been specified then standard page numbers are used.
- **'<integer>** specifies the minimum number of digits used. This value can be any positive integer from 1 to 12 - for example **%[Pages:4]** starts the numbering as **"0001, 0002, 0003...".**

The syntax for this macro when parameters are used is **%[Pages:<Parameter>]**

Examples

Follow the steps below to use the **Page Number** macro to insert the total number of document pages as a watermark:

1. Click **Document** in the **Menu Toolbar,** 473 then hover over **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

2. Enter **%[Pages]** in the **Text** text box. The total number of document pages is then inserted as a watermark:
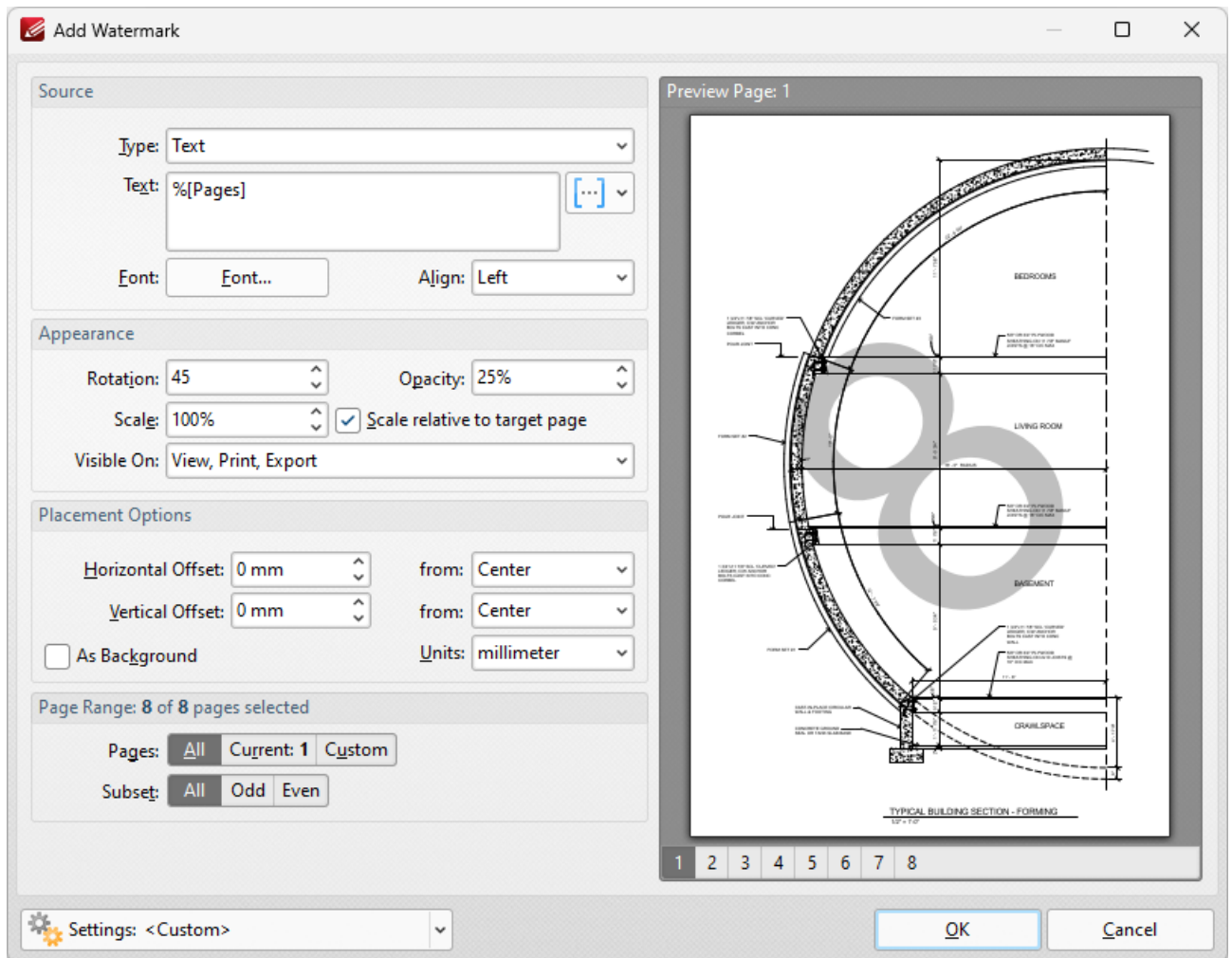
Figure 1. Add Watermark Dialog Box, %[Pages] Macro Example

Alternatively, enter **%[Pages:R]** in the **Filename** text box to insert the total number of document pages as a watermark and specify the use of upper-case roman numerals:
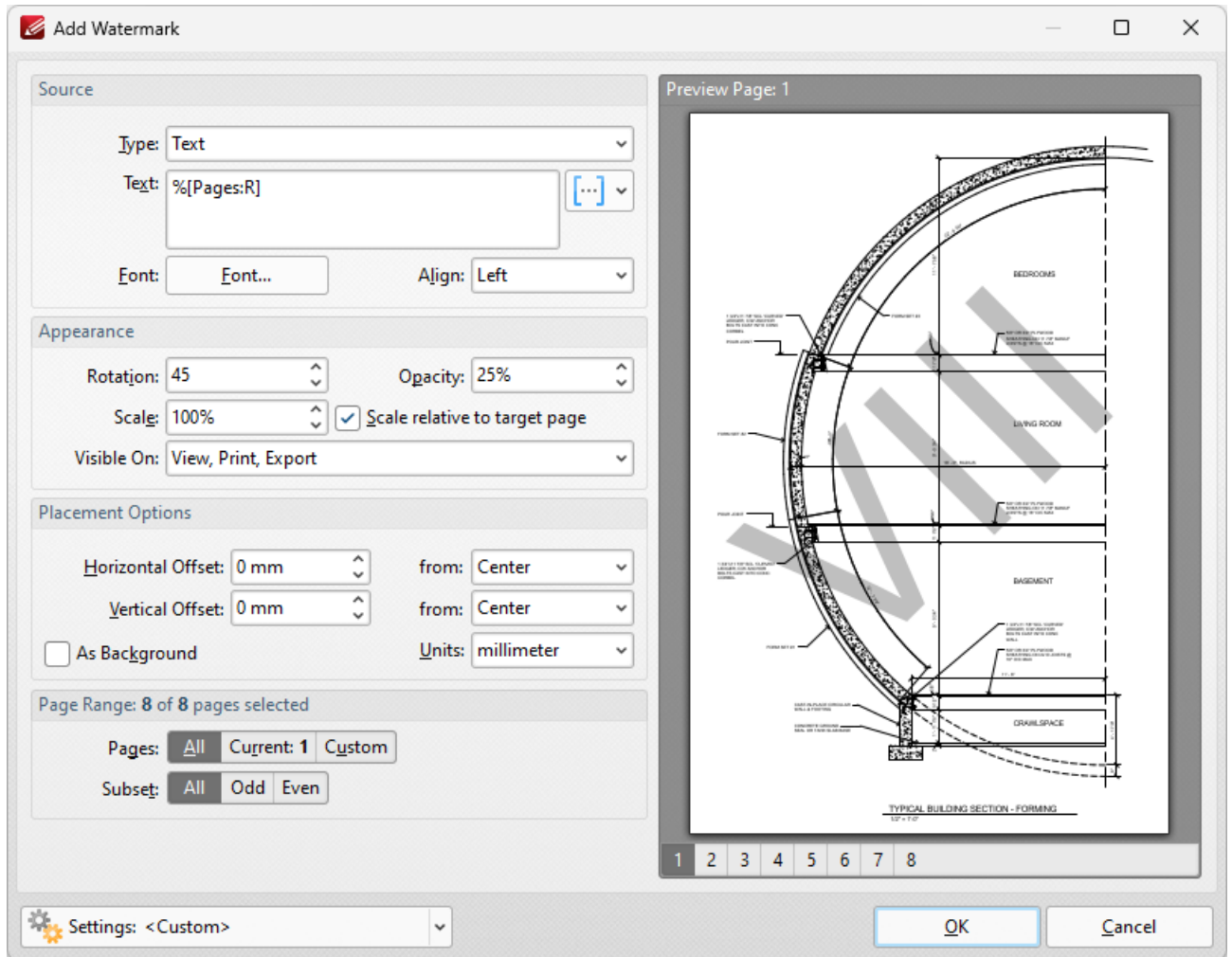
Figure 2. Add Watermark Dialog Box, %[Pages] Macro Example Two

Page First Text Line

Page First Text Line

The **Page First Text Line** macro inserts the first line of page text as the title for generated bookmarks.

The syntax for this macro is **%[FirstLine]**

Example

Follow the steps below to use the **Page First Text Line** macro to insert the first line of page text as the bookmark title when using the **Bookmark Every Nth Page** 1052 feature:

    1. Open a document in **PDF-XChange Editor.**

    2. Click the **Bookmarks** tab, then click **Bookmark Every Nth Page.** The **Bookmark Every Nth Page** dialog box will open.

    3. Enter **%[FirstLine]** in the **Bookmark Title Template** text box:
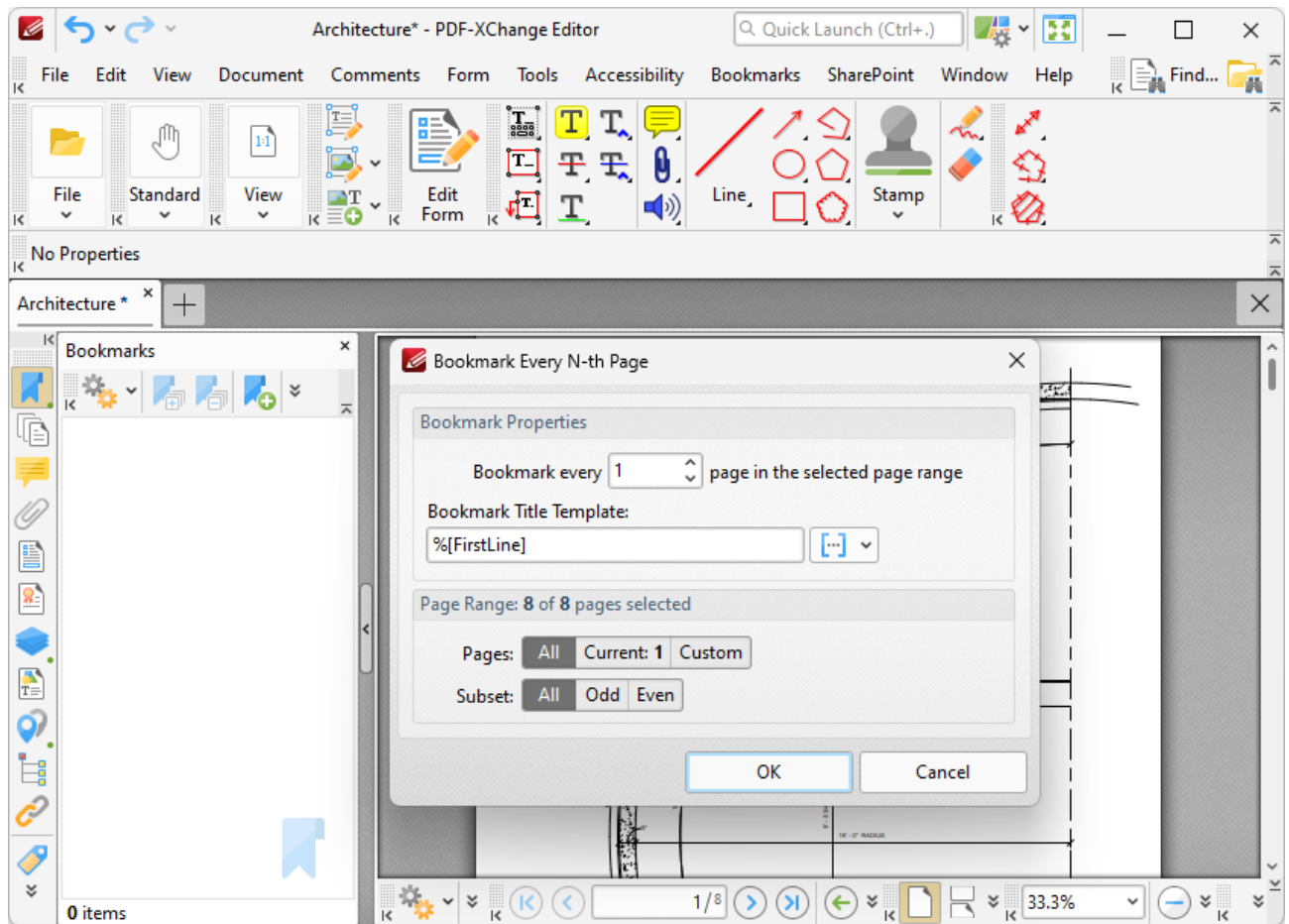
Figure 1. %[First Line] Macro Example

4. Click **OK.** The first line of text on each page will then be added as the bookmark title:
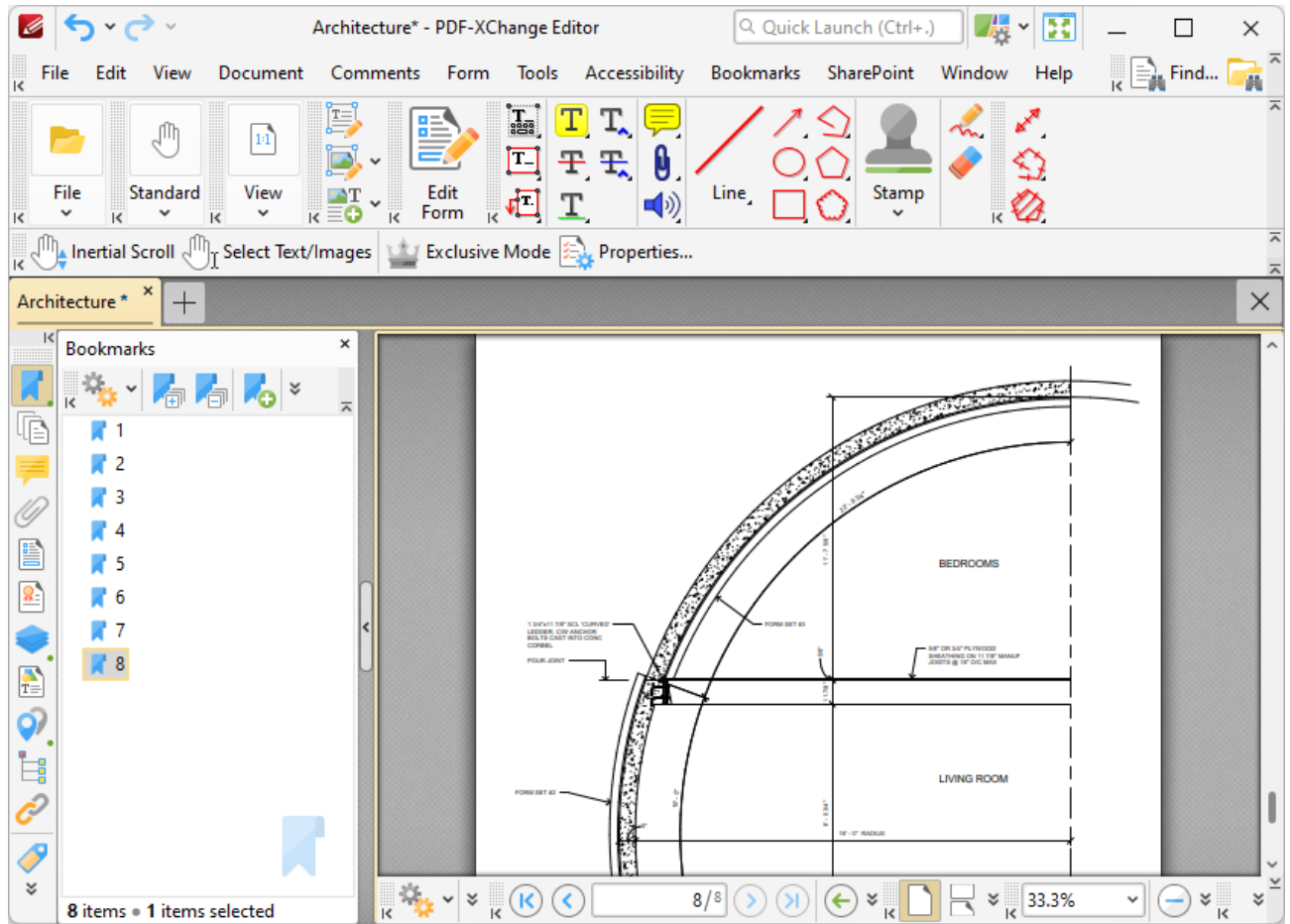
Figure 2. %[First Line] Macro Output Example

6.13.27 **Page Label**

___

Page Label

___

The **Page Label** macro inserts the page label of bookmarks.

The syntax for this macro is **%[Label]**

Example

Follow the steps below to use the **Page Label** macro to insert the page label of bookmarks when using the **Add Text to Bookmark Titles** feature:

    1. Open a document in **PDF-XChange Editor.**

    2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Title** dialog box will open.

    3. Enter **%[Label]** in the **Add Suffix** text box:
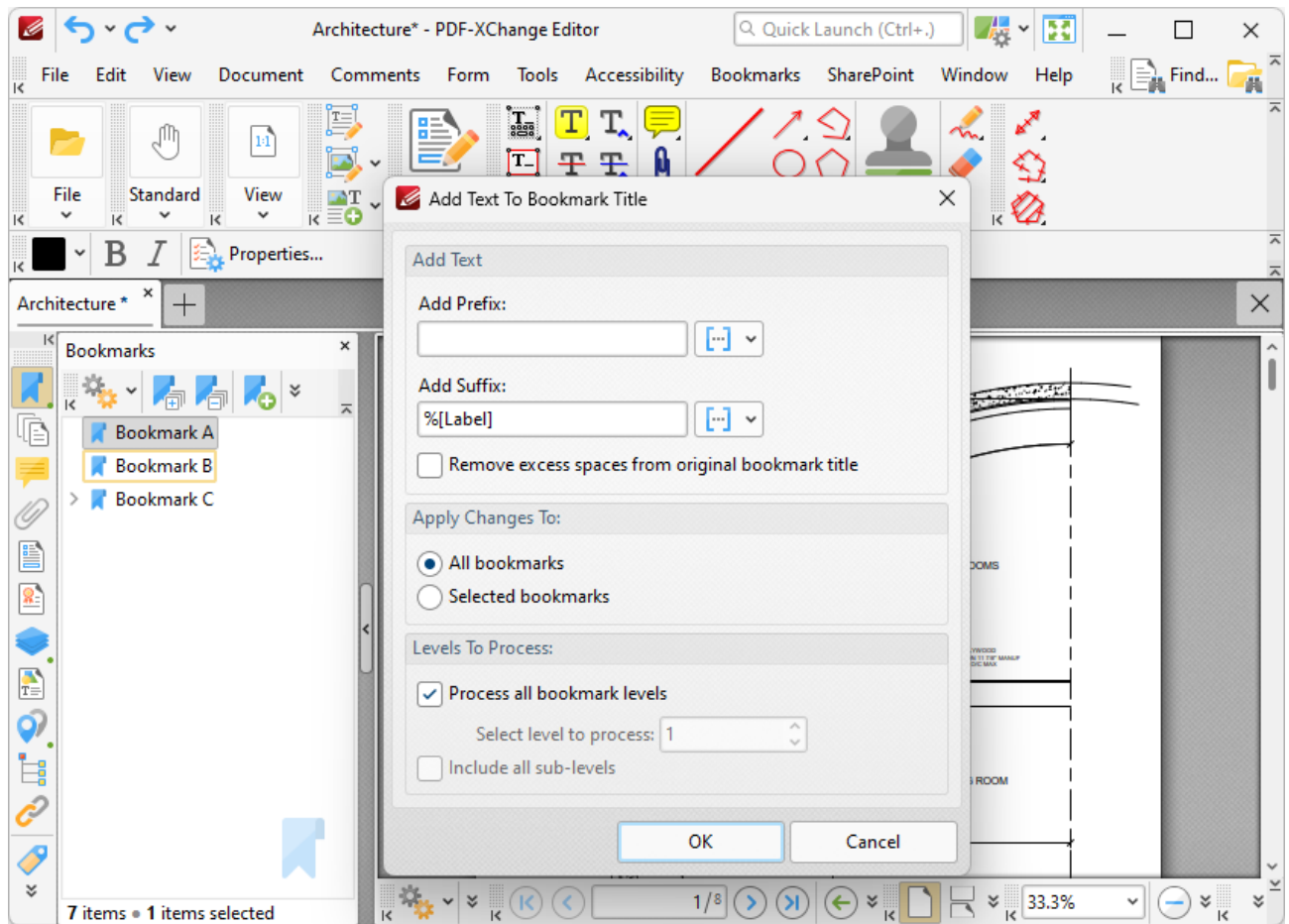
Figure 1. %[Label] Macro Example

4. Click **OK.** The page label of bookmarks will then be added to the respective bookmark title:
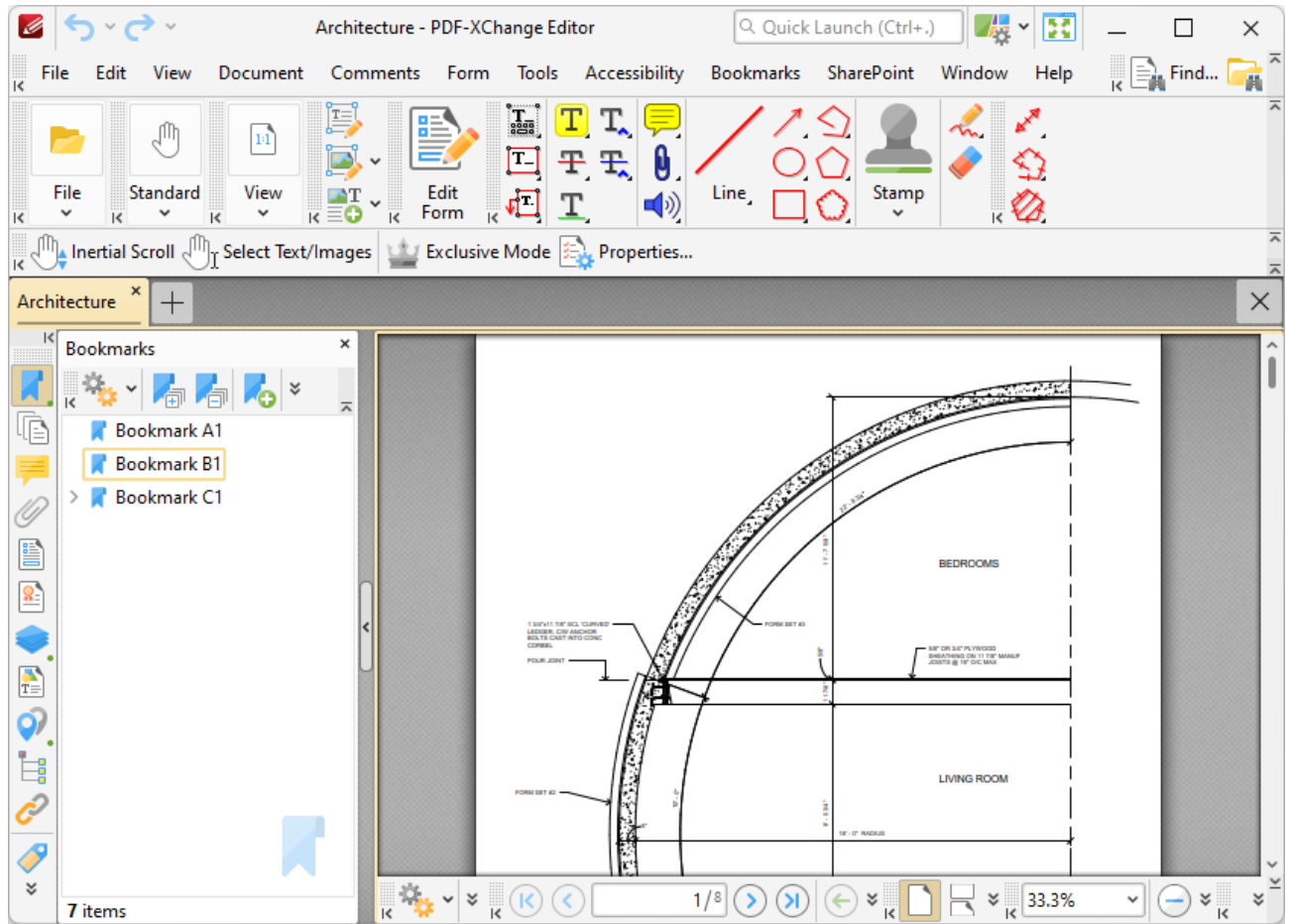
Figure 2. %[Label] Macro Output Example

6.13.28 **Page Number**

Page Number

The **Page Number** macro inserts the page number of source pages.

The syntax for this macro is **%[Page]** and two sections of parameters are available.

The first section determines the format of page numbers:

- **'r'** specifies the use of lower-case roman numerals.
- **'R'** specifies the use of upper-case roman numerals.
- **'L'** specifies page labels as the page numbering format in cases where page labels have been specified. If page labels have not been specified then standard page numbers are used.
- **'<integer>** specifies the minimum number of digits used. This value can be any positive integer from 1 to 12 - for example **%[Page:4]** starts the numbering as **"0001, 0002, 0003...".**

The second section determines the starting value for page numbers, and must therefore be an integer.

Please note that a semicolon must be used to delimit the sections of parameters. If the second section is not used then the semicolon can be omitted. However, if the first section is not used and the second section is used, then it is necessary to use the semicolon.

The syntax for this macro when both parameters are used is **%[Page:<Parameter 1>;<Parameter 2>]**

The syntax for this macro when only the second parameter is used is **%[Page:;<Parameter 2>]**

Examples

Follow the steps below to use the **Page Number** macro to insert page numbers as Bates numbering:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Bates Numbering** and click **Add.** The **Add Bates Numbering** dialog box will open.

3. Enter **%[Page]** in the desired text box. Page numbers are then inserted as Bates numbering:
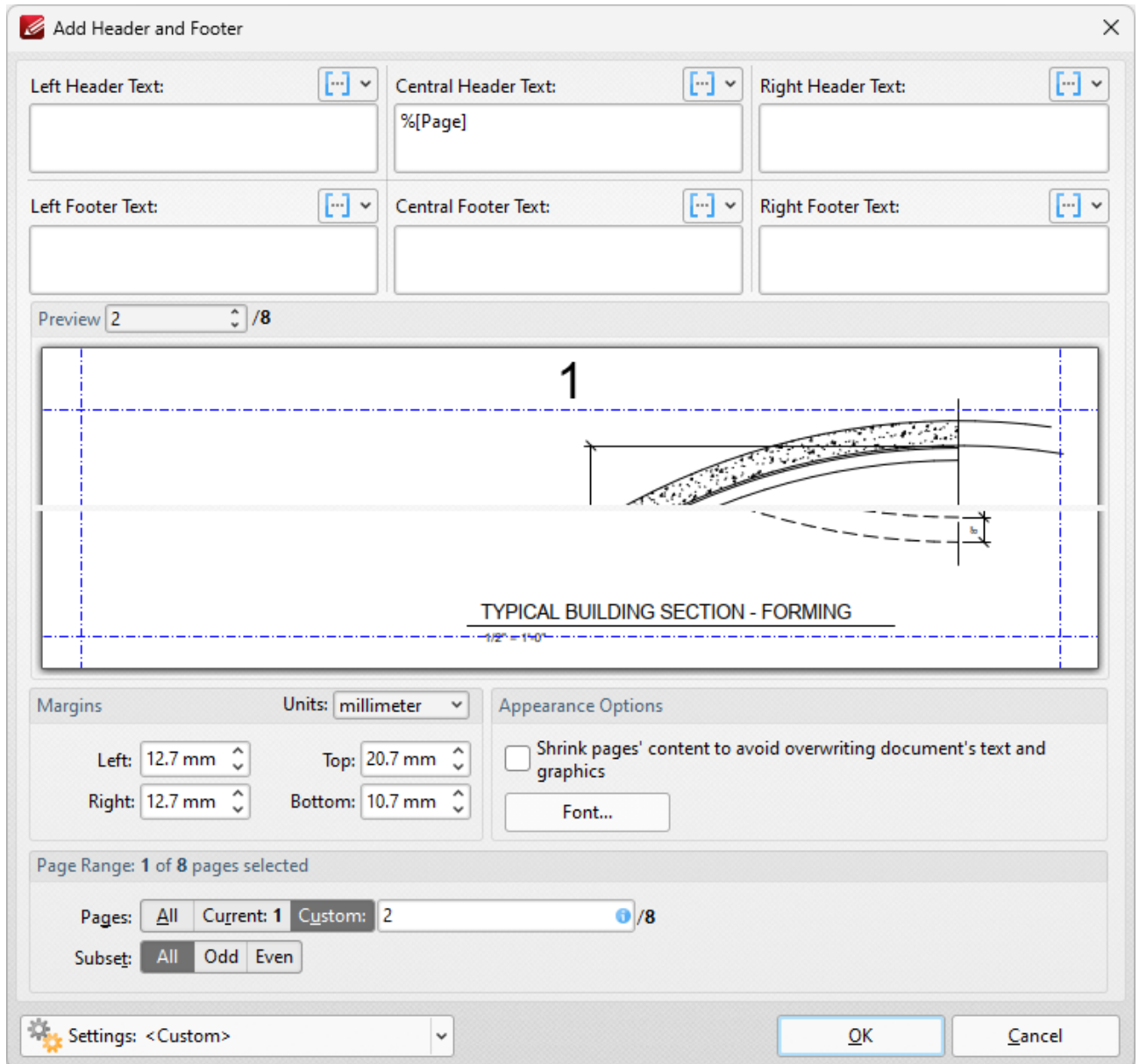
Figure 1. %[Page] Macro Example

Alternatively, enter **%[Page:R]** to specify the use of upper-case roman numerals:
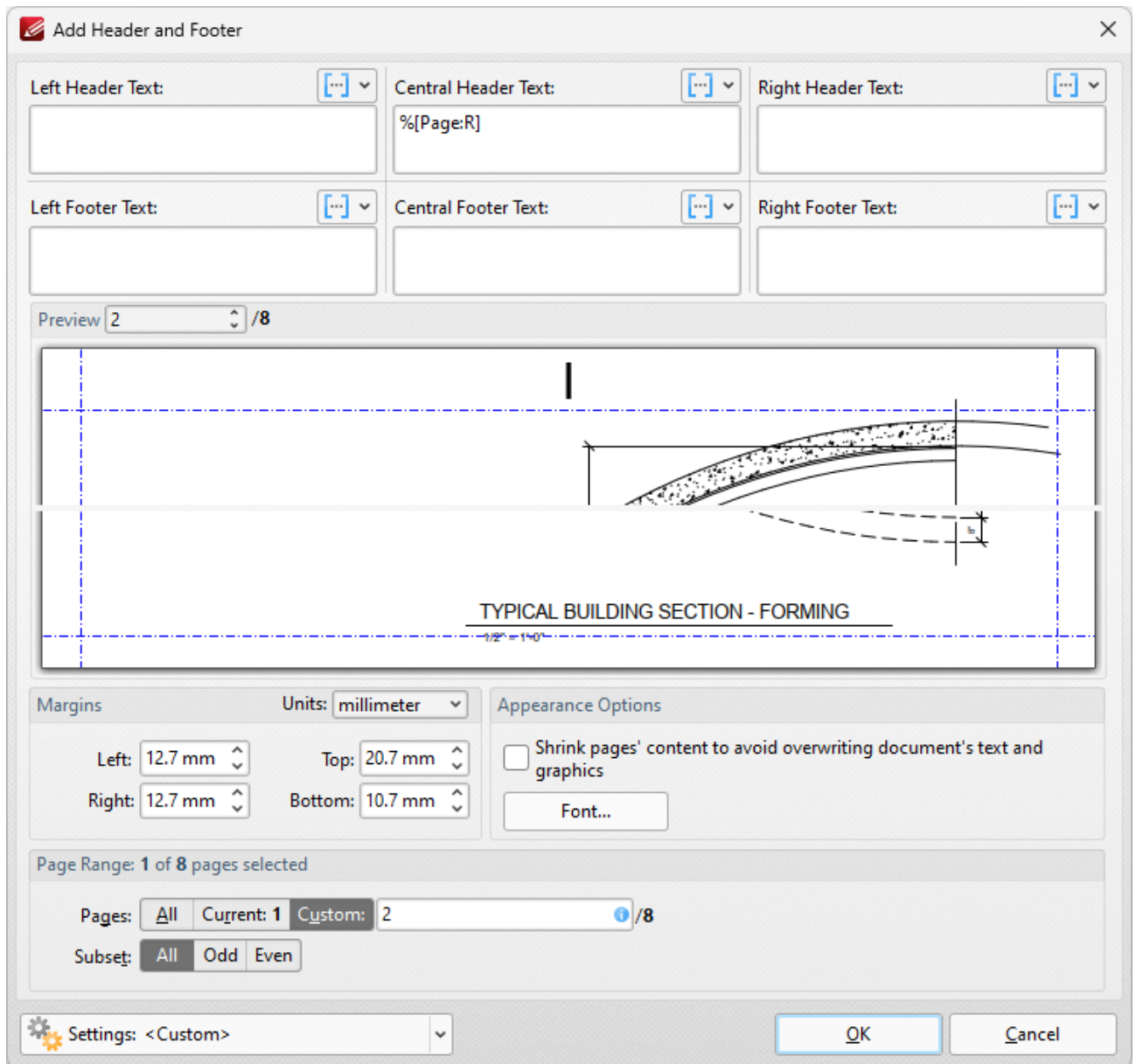
Figure 2. %[Page] Macro Example Two

Alternatively, enter **%[Page:4;10]** to specify a minimum of four digits for output values and a starting value of ten:
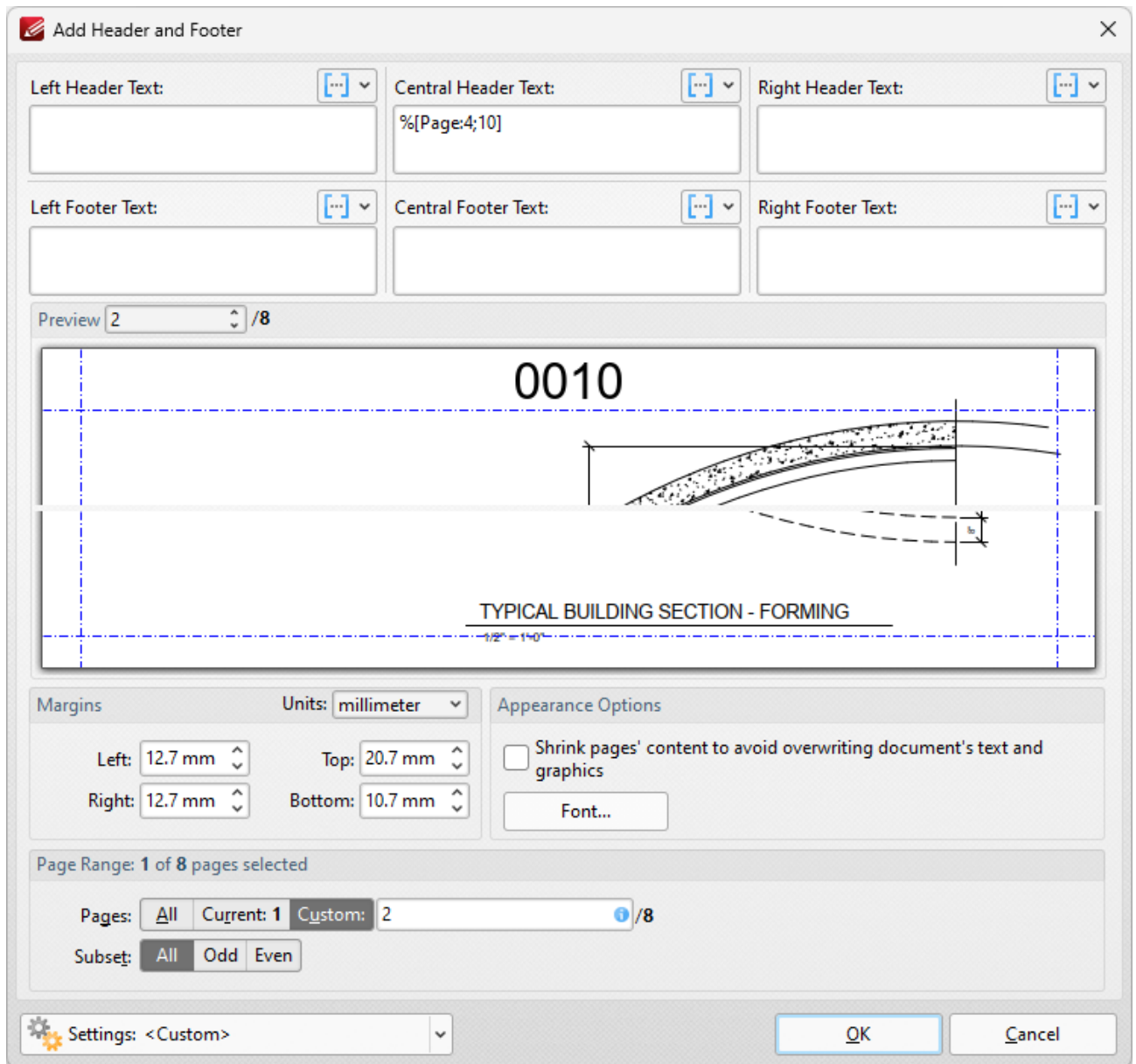
Figure 3. %[Page] Macro Example Three

Alternatively, enter **%[Page:;5]** to omit the first parameter and specify a starting value of five:
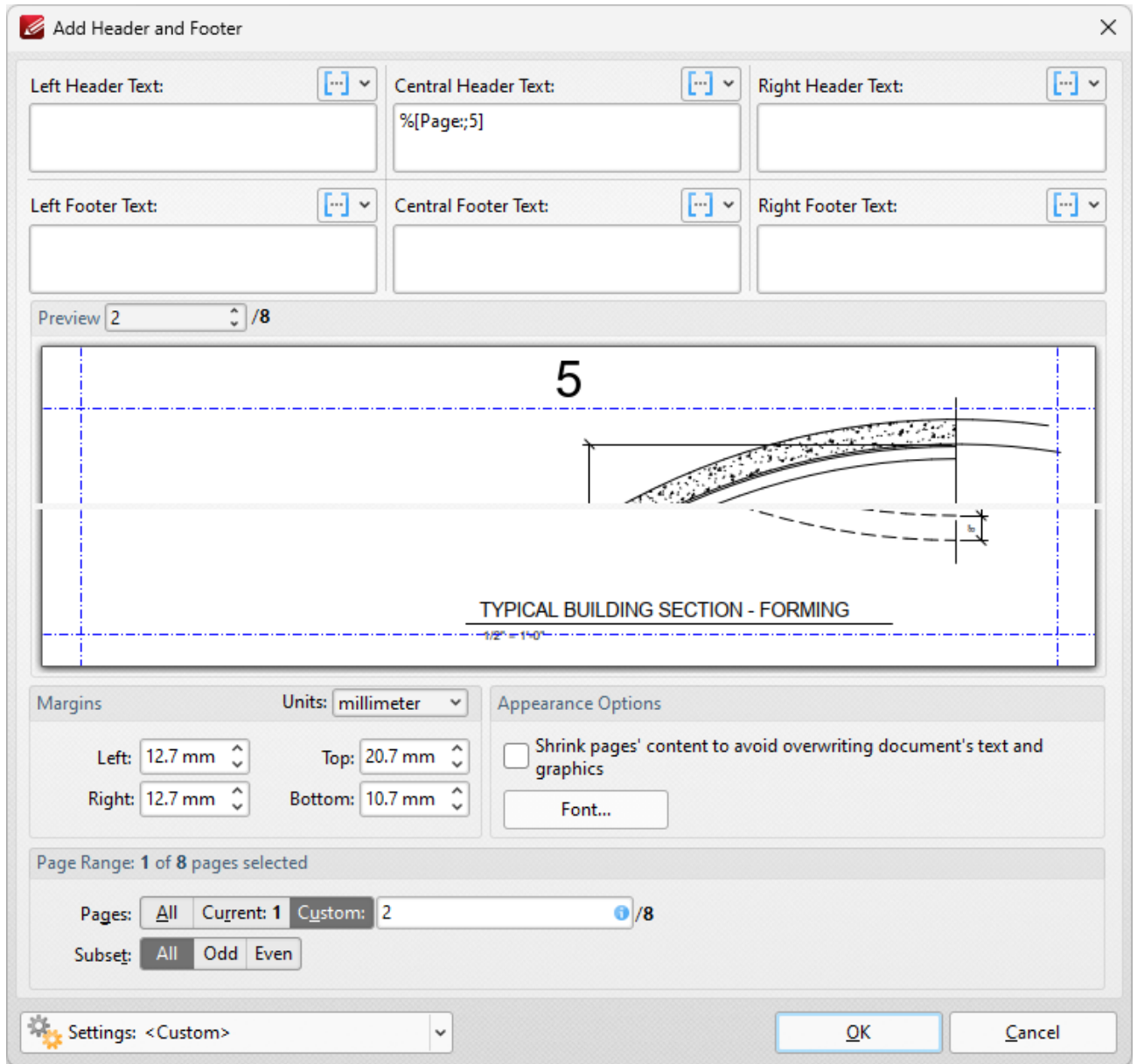
Figure 4. %[Page] Macro Example Four

6.13.28.1 Page Numbering Style

Page Numbering Style

The **Page Numbering Style** feature is an additional macro feature that uses the **Page Number** and **Number of Pages** macros to create page number styles. Follow the step below to view the options available for this feature:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Header and Footer,** and the click **Add.** The **Add Header and Footer** dialog box will open:
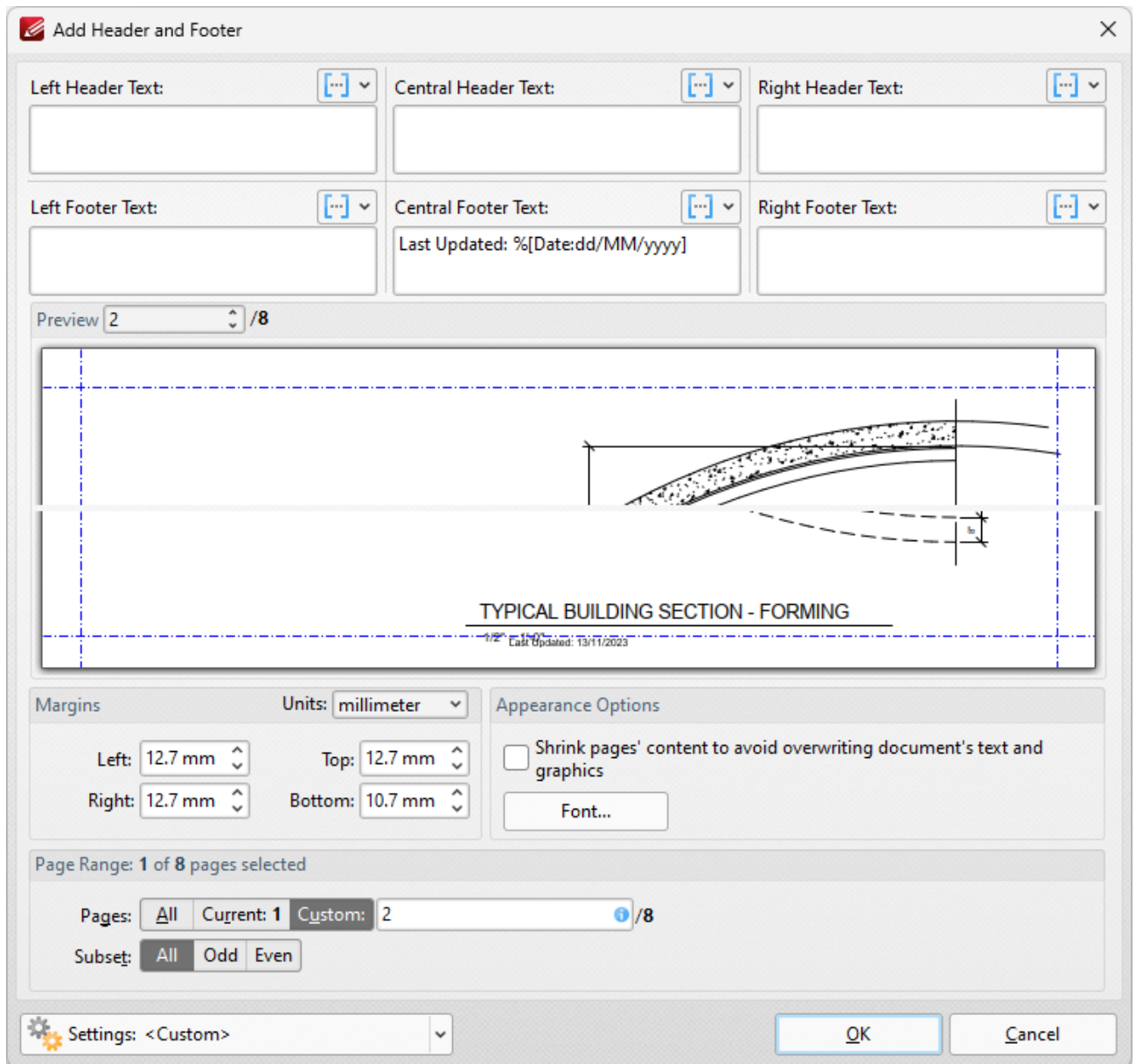
Figure 1. Add Header and Footer Dialog Box

3. Click a macro icon to view the macro shortcut menu. The current **Page Number Style** will be detailed in the menu. Click **Edit Page Numbering Style** to view/select alternative page numbering styles:
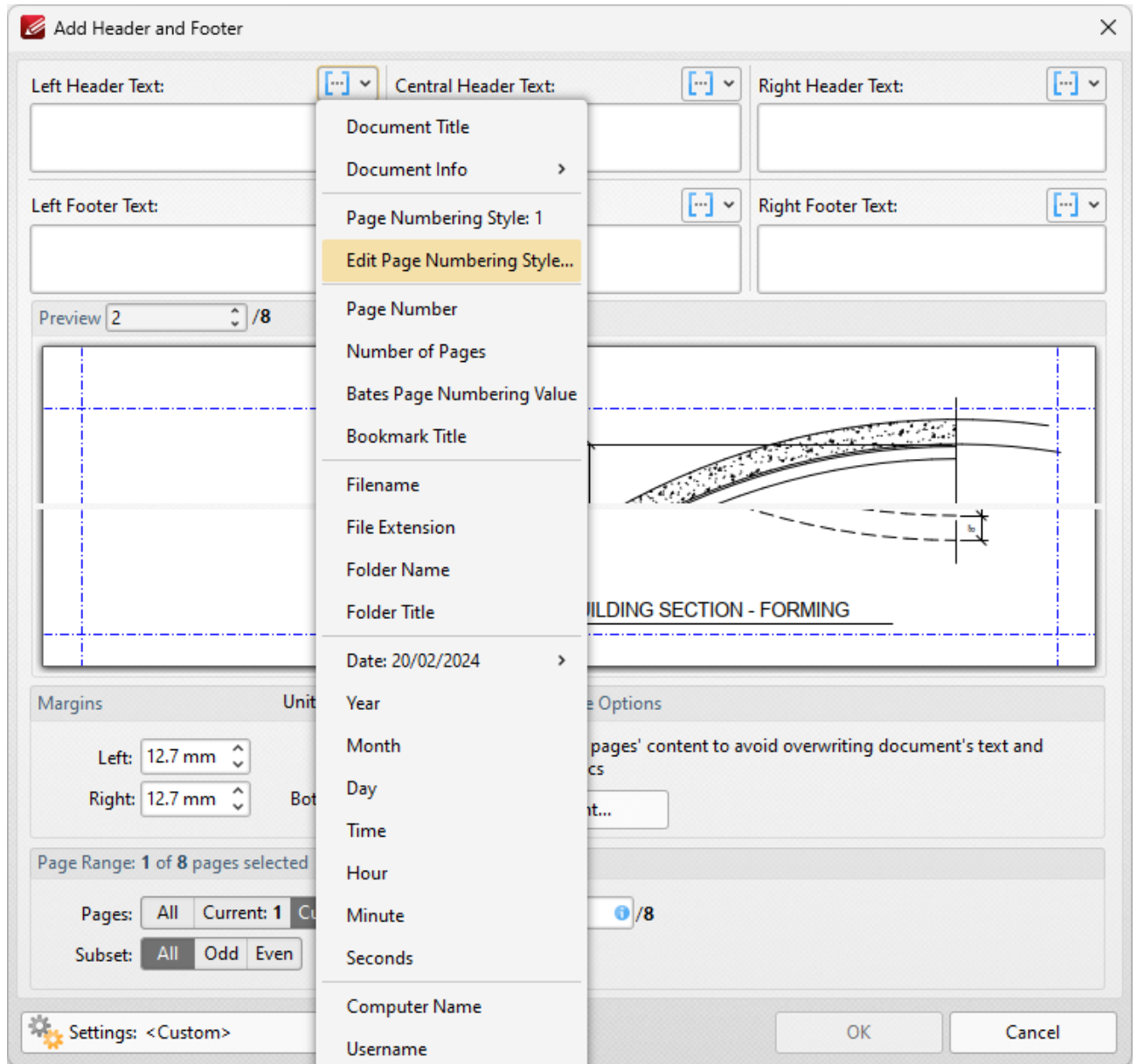
Figure 2. Add Header and Footer Dialog Box, Macro Shortcut Menu, Edit Page Numbering Style Highlighted

The **Edit Page Numbering Style Format** dialog box will open:
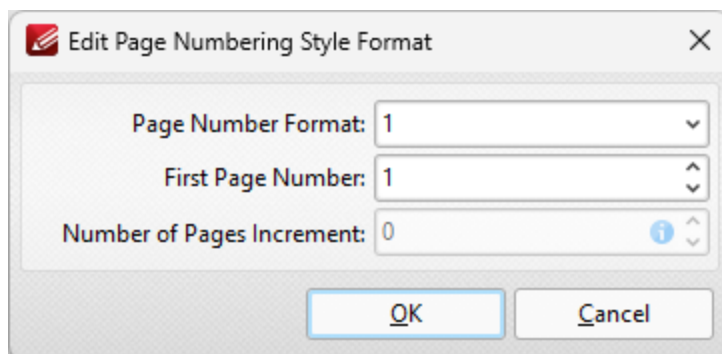
Figure 3. Edit Page Numbering Style Format Dialog Box

3. Click the arrow in the **Page Number Format** dropdown menu to view alternative page number formats. The following options are available:

- **1** outputs the page number. This is the default setting.
- **1 of n** outputs the page number followed by 'of n', where 'n' is the total number of document pages.
- **1/n** outputs the page number followed by a forward slash and 'n', where 'n' is the total number of document pages.
- **Page 1** outputs the text "Page" followed by the page number.
- **Page 1 of n** outputs the text "Page" followed by the page number and 'of n', where 'n' is the total number of document pages.
- Use the **First Page Number** text box to determine the first page number used.
- Use the **Number of Pages Increment** text box to increase the total number of pages given as the output figure when the options above that involve 'n' are used.

Example

The **Add Header and Footer** dialog box detailed below is for a blank, four-page document. The first step is to select one of the macro icons and then click **Edit Page Numbering Style:**
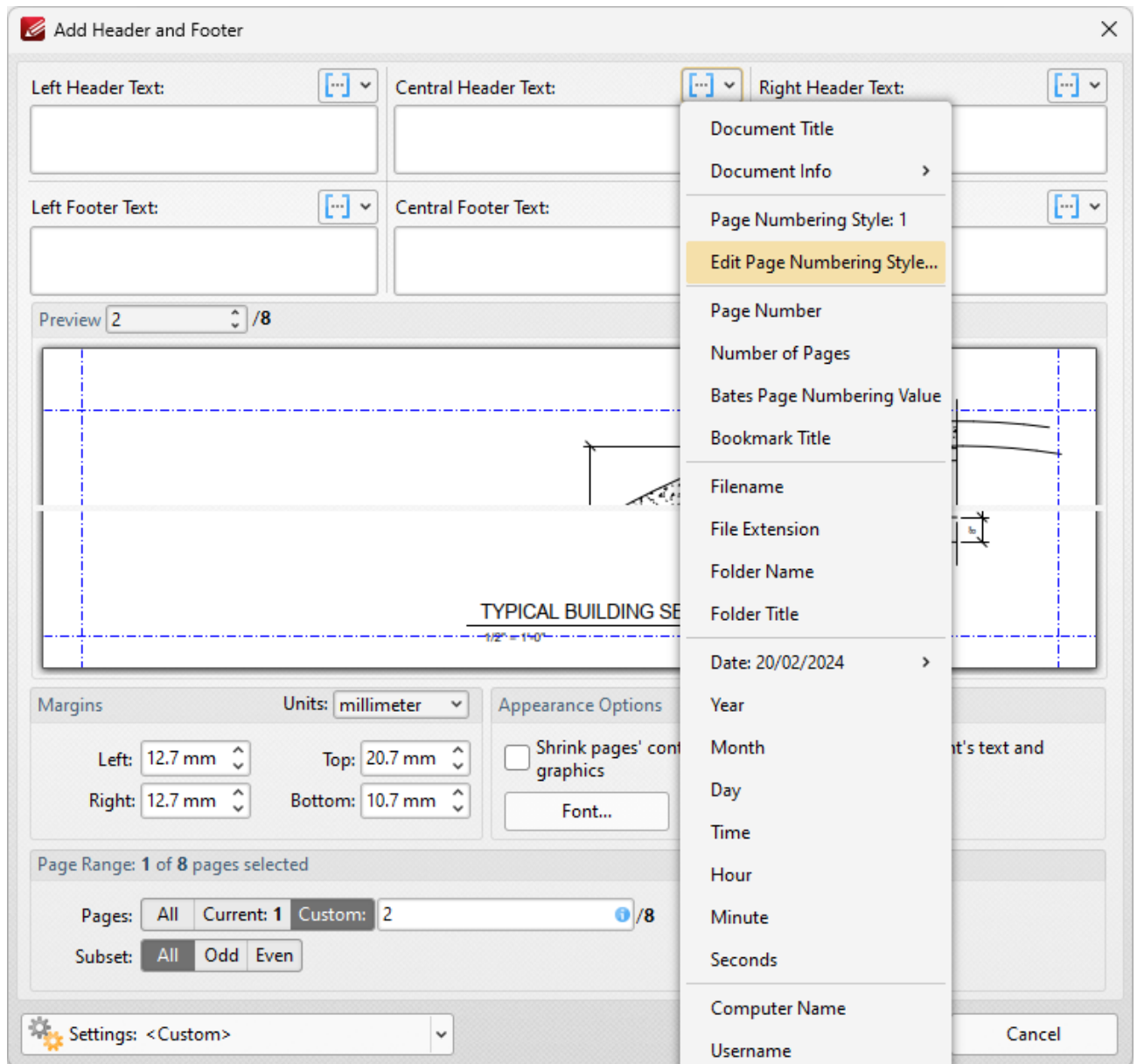
Figure 4. Add Header and Footer Dialog Box, Edit Page Numbering Style Highlighted

The second step is to select the desired page numbering format in the **Edit Page Numbering Style Format** dialog box:
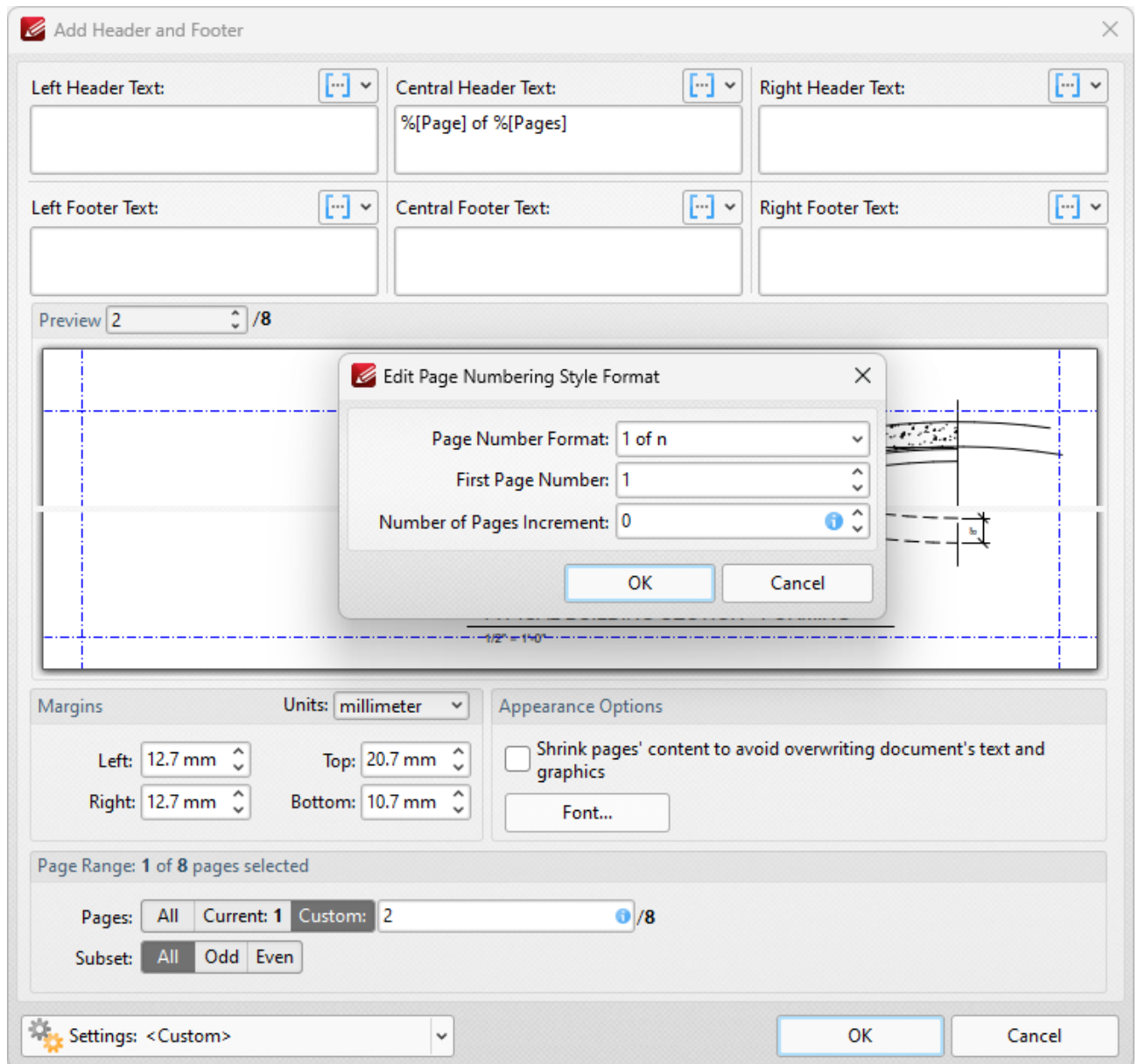
Figure 5. Edit Page Numbering Style Format Dialog Box, Page Number Format and Number of Pages Increment Fields Updated

The third step is to click **OK,** after which the custom macro will be added to the **Add Header and Footer** dialog box, and the preview pane will update to show its output in the document:
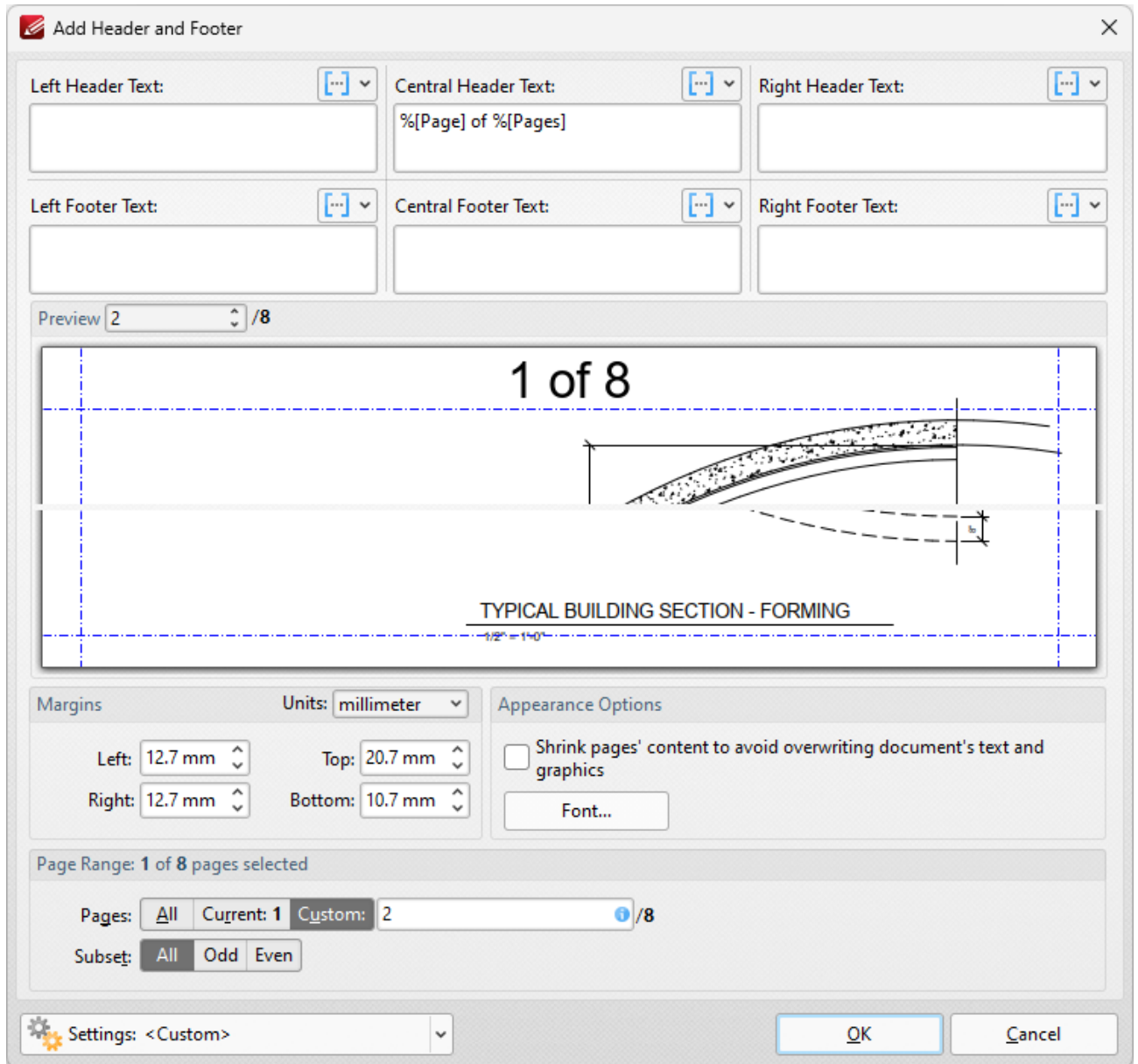
Figure 6. Header and Footer Dialog Box, Page Numbering Style Options Added to Left Header Text Box, Preview Pane Updated

6.13.29 Seconds

 Seconds

The **Seconds** macro inserts the seconds value from the current time.

The syntax for this macro is **%[Seconds]**

Example

If the current time is 17:18 and 15 seconds then the **%[Seconds]** macro inserts '36':
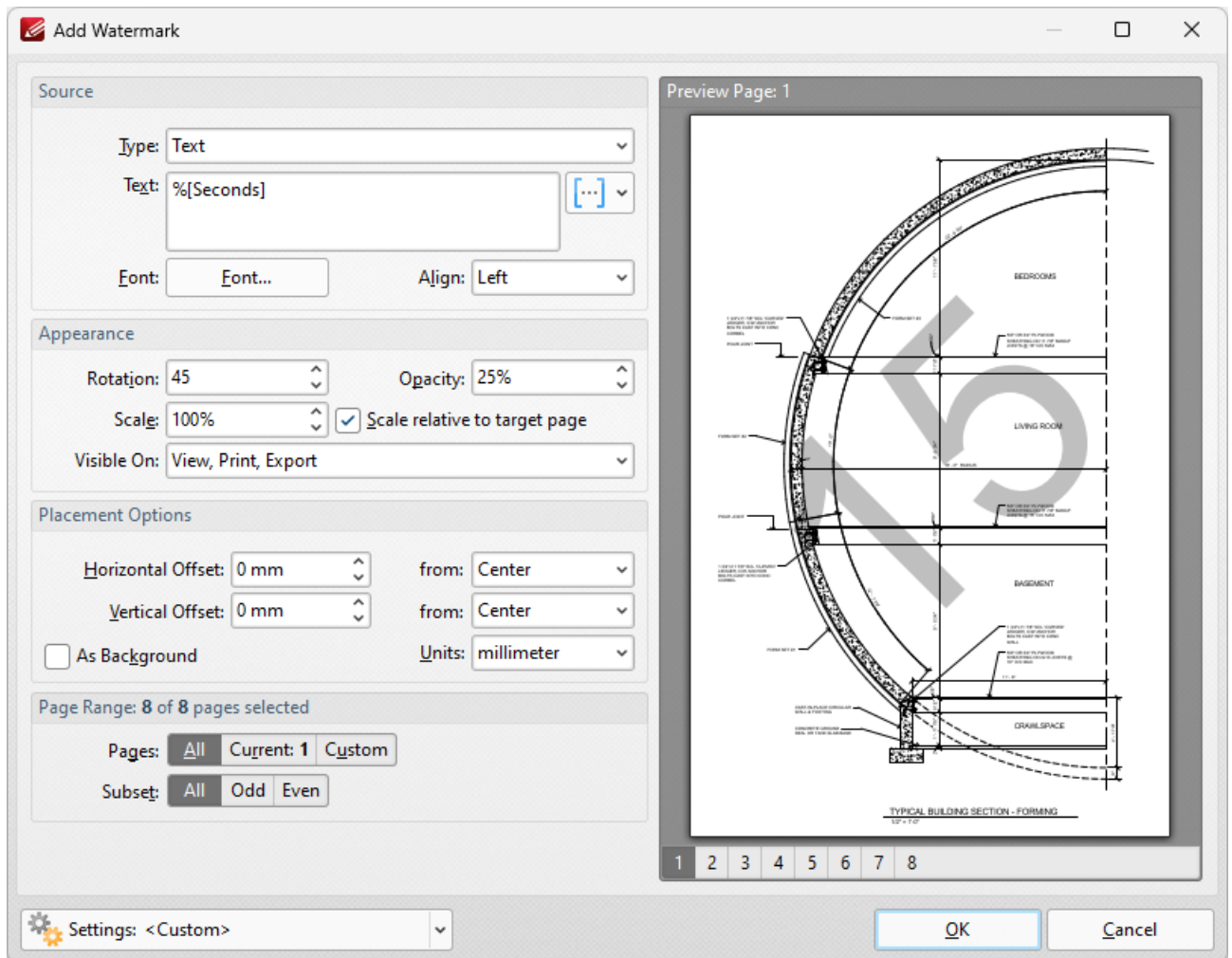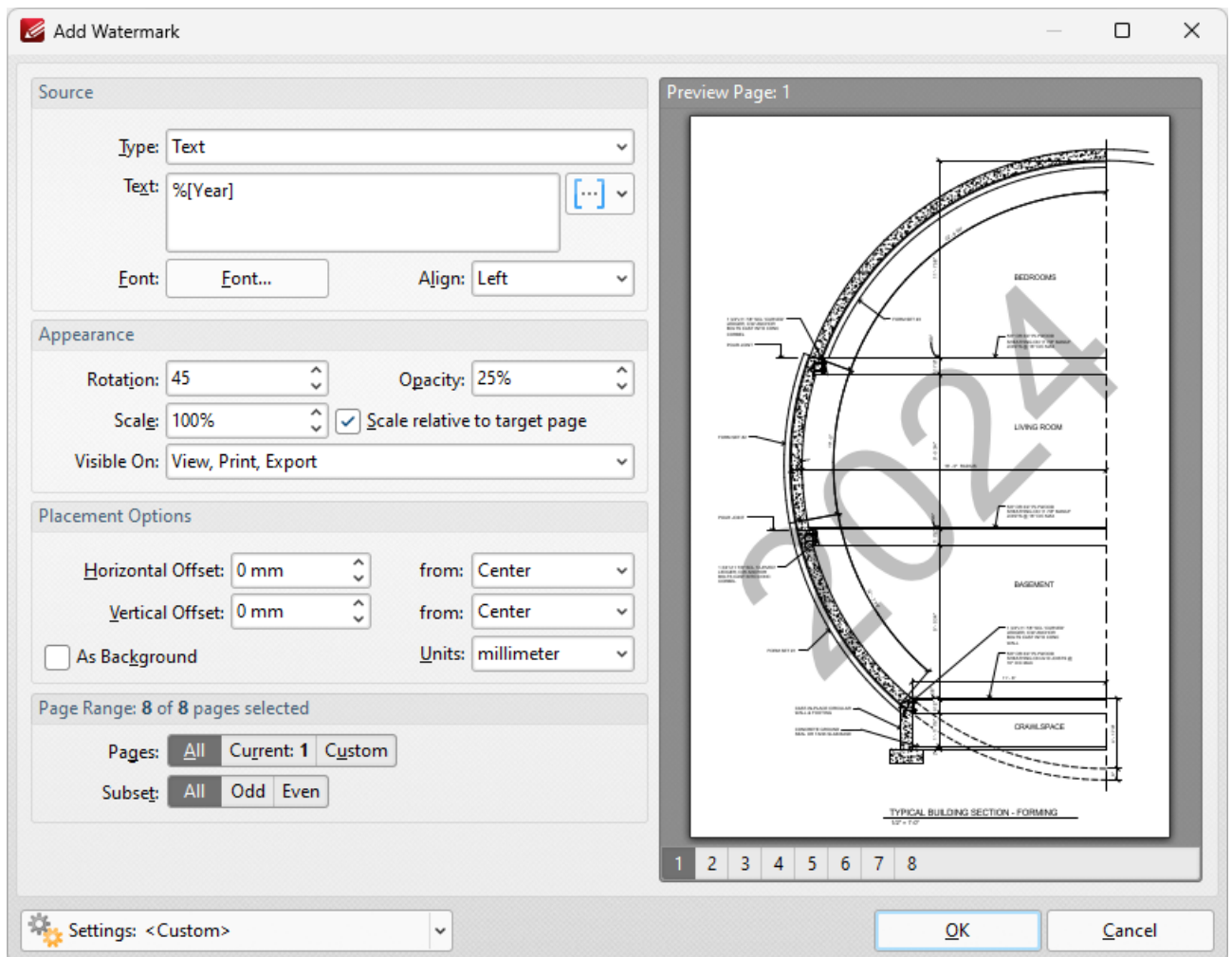
Figure 1. %[Seconds] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Hour]:%[Minute],%[Seconds]** output the hour followed by the minutes of the hour and the seconds of the minute:
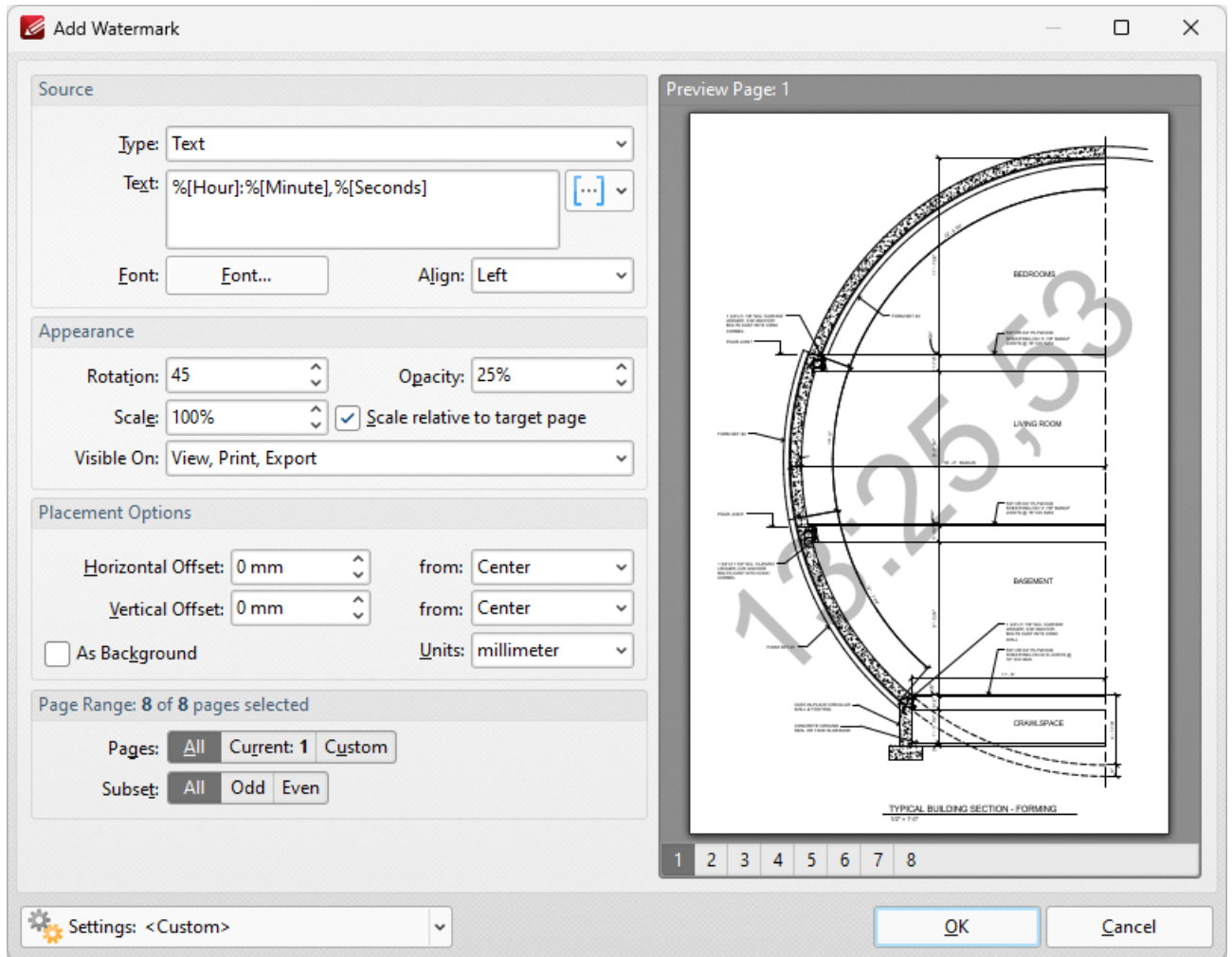
Figure 2. **%**[Seconds] Combined Macro Example

6.13.30 Sequential Number

Sequential Number

The **Sequential Number** macro inserts the sequential number of bookmarks, which is the sequential value of each bookmark in the context of the entire bookmarks tree.

The syntax for this macro is **%[SeqNum]**

Example

Follow the steps below to use the **Sequential Number** macro to insert the sequential number of bookmarks when adding text to bookmark titles:

    1. Open a document that contains bookmarks in **PDF-XChange Editor.**

    2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

    3. Enter **%[SeqNum]** in the **Add Suffix** text box:
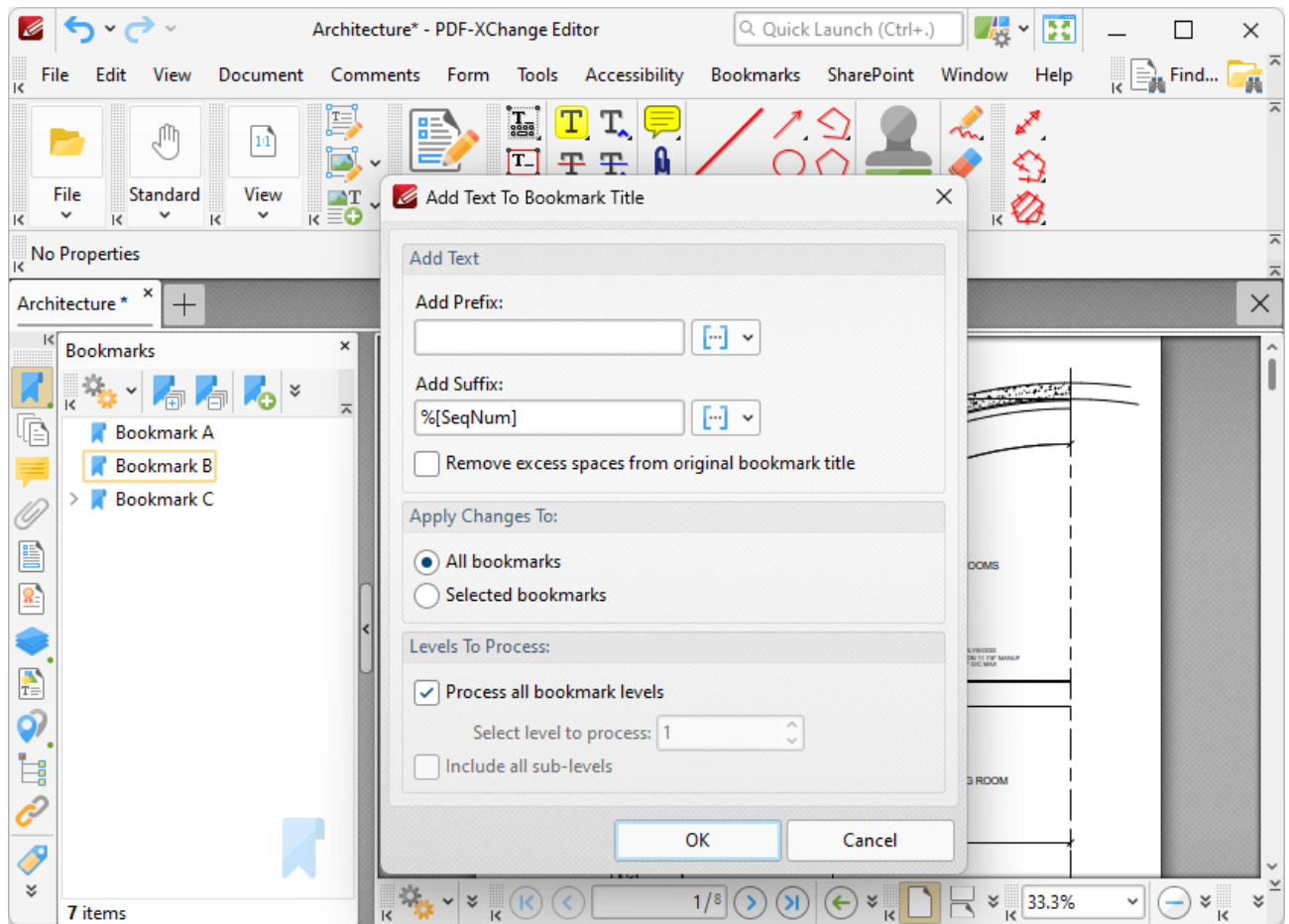
Figure 1. %[SeqNum] Macro Example

4. Click **OK.** The sequential number of each bookmark will then be added as a suffix to all bookmark titles:
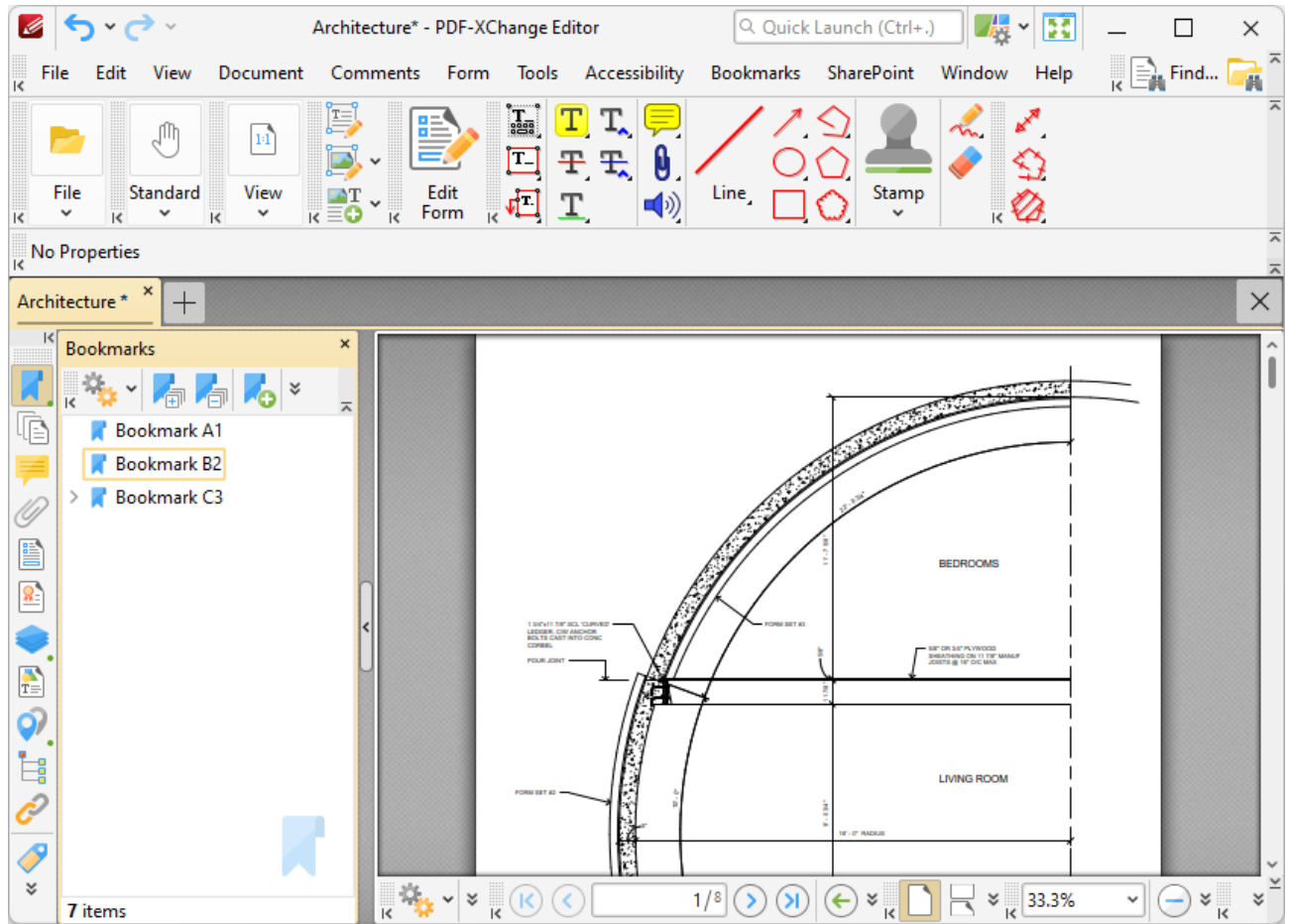
Figure 2. %[SeqNum] Macro Example Output

6.13.31 Time

Time

The **Time** macro inserts the current time. Multiple time formats are available, as detailed below.

The syntax for this macro is **%[Time]** and the following parameters are available:

- **h** inserts the hour and omits the zero in cases of single-digit values.
- **hh** inserts the hour and includes a zero in cases of single-digit values.
- **H** inserts the hour, includes a zero in cases of single-digit values and uses a 24 hour-clock.
- **m** inserts the minutes and omits the zero in cases of single-digit values.
- **mm** inserts the minutes and includes a zero in cases of single-digit values.
- **s** inserts the seconds and omits the zero in cases of single-digit values.
- **ss** inserts the seconds and includes a zero in cases single-digit values.
- **t** inserts a single character to reference the a.m./p.m. variable: **a** or **p.**
- **tt** inserts two characters to reference the a.m/p.m. variable: **AM** or **PM.**

The syntax for this macro when parameters are used is **%[Time:<Parameter>]**

Note that several parameters can be used in sequence in order to insert a customized time. For example, **%[Time:H:mm tt]** inserts the current hour and minutes, and inserts two characters to reference the a.m./p.m. variable (as detailed below).

Example

Follow the steps below to use the **Time** macro to create a watermark that inserts a customized version of the current time:

1. Click **Document** in the **Menu Toolbar.** 473

2. Hover over **Watermarks** and click **Add.** The **Add Watermark** dialog box will open.

3. Enter **%[Time:H:mm tt]** in the **Text** text box. A customized version of the time is then added as a watermark:
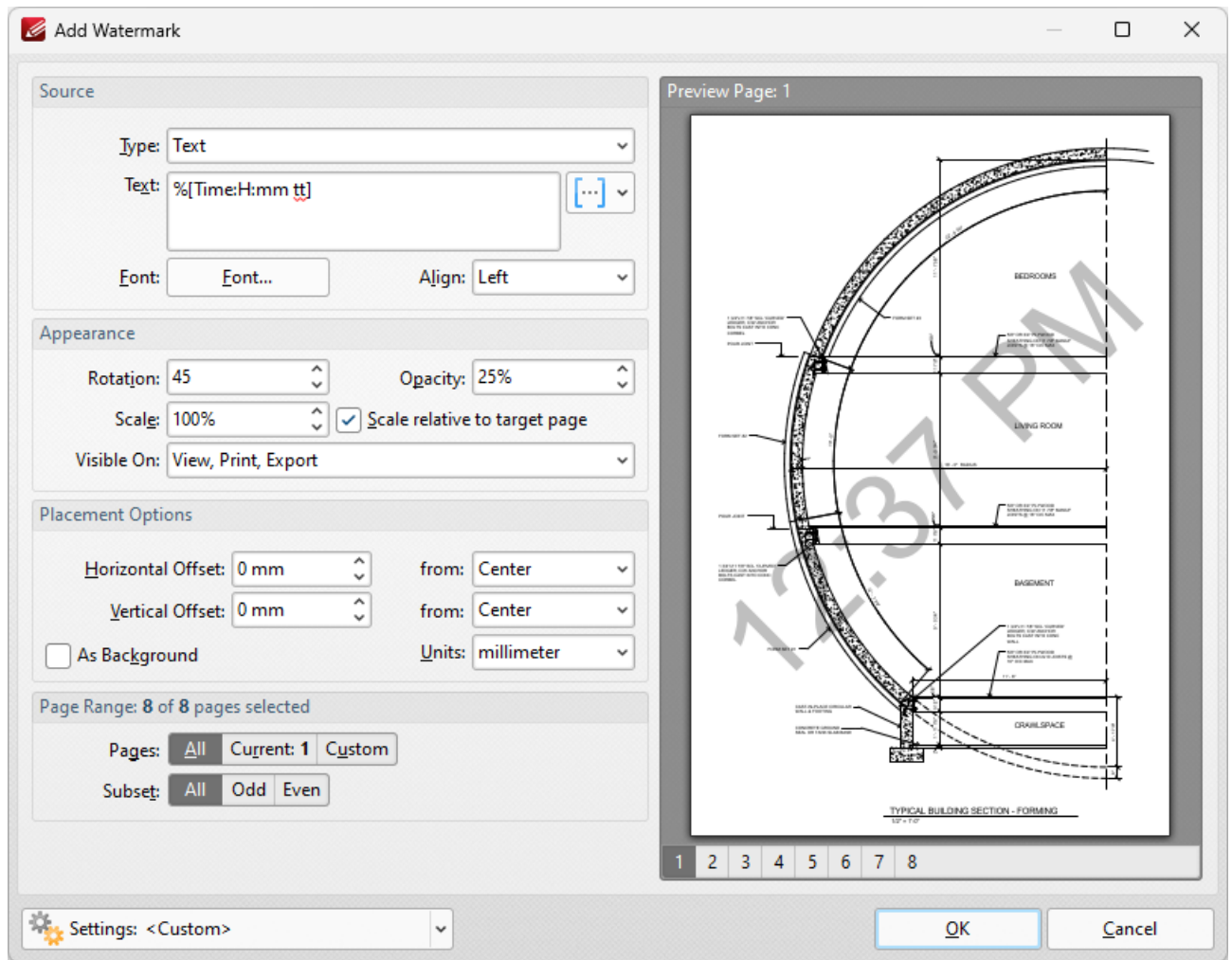
Figure 1. %[Time] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Time:H:mm] %[Month]/%[Day]** output the current time followed by the month and the day of the month:
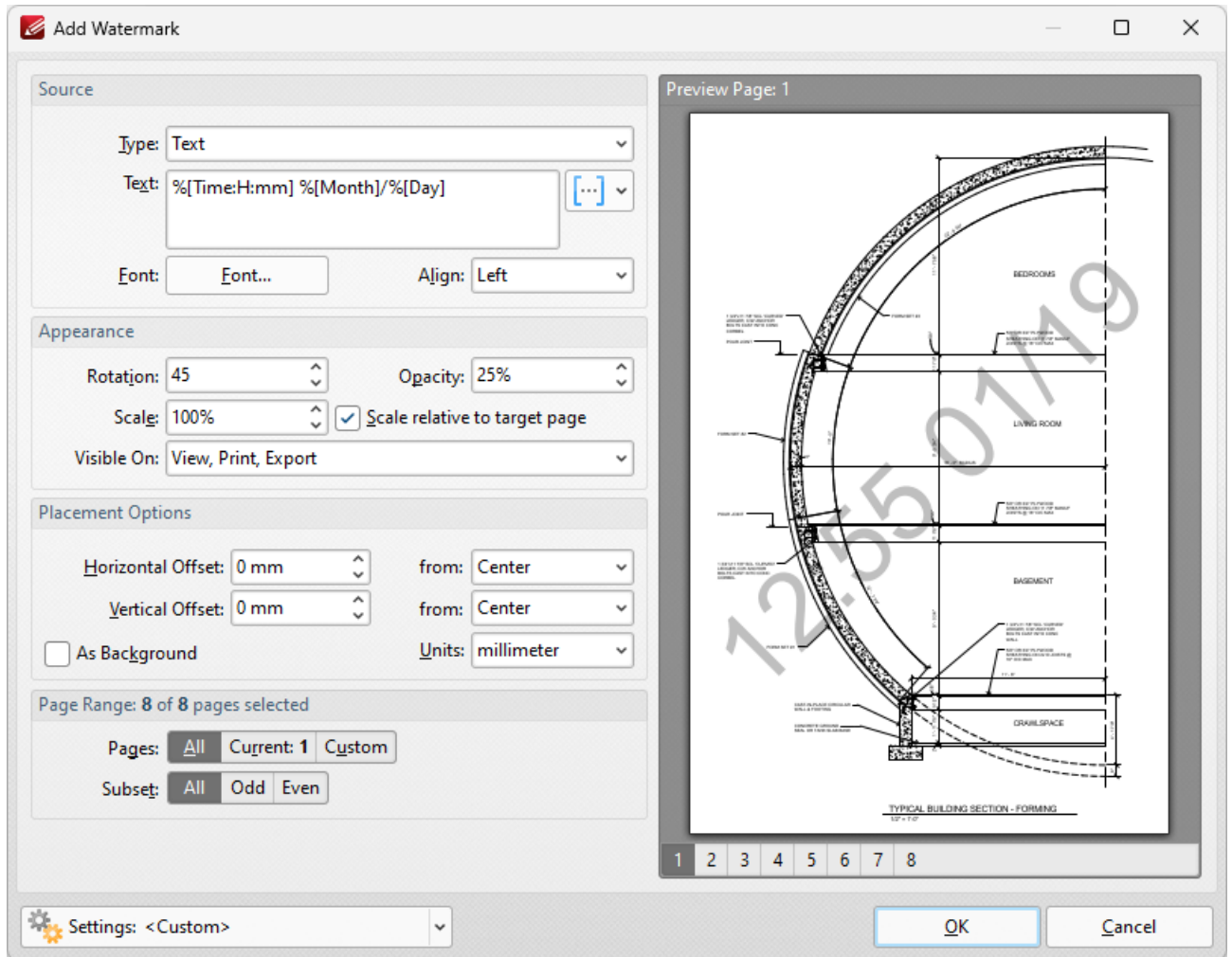
Figure 2. %[Time] Combined Macro Example

6.13.32 **Username**

Username

The **Username** macro inserts the name of the current user.

The syntax for this macro is **%[User]**

Example
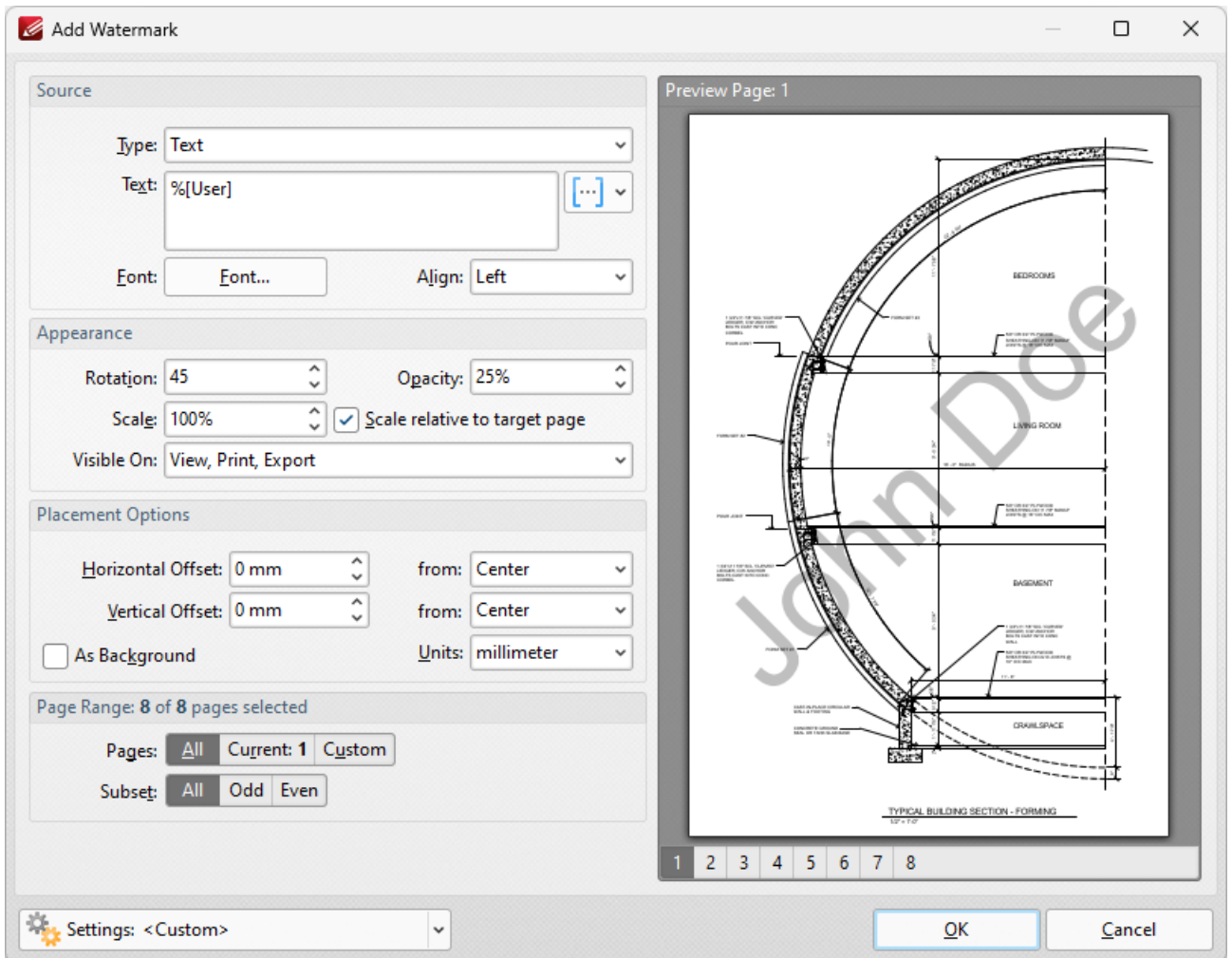
Figure 1. %[Username] Macro Example

6.13.33 **Web Link to Open**

Web Link to Open

The **Web Link to Open** macro inserts the URI link of bookmarks. These links are used to specify an internet address that opens when bookmarks are clicked. You can view/edit these links in the bookmark's properties, as detailed **here.** 504

The syntax for this macro is **%[URI]**

Example

Follow the steps below to use the **Web Link to Open** macro to insert the URI link of bookmarks when adding text to bookmark titles:

> 1. Open a document that contains bookmarks with URI links. For example, the bookmark detailed below contains a URI link to the **PDF-XChange** website:
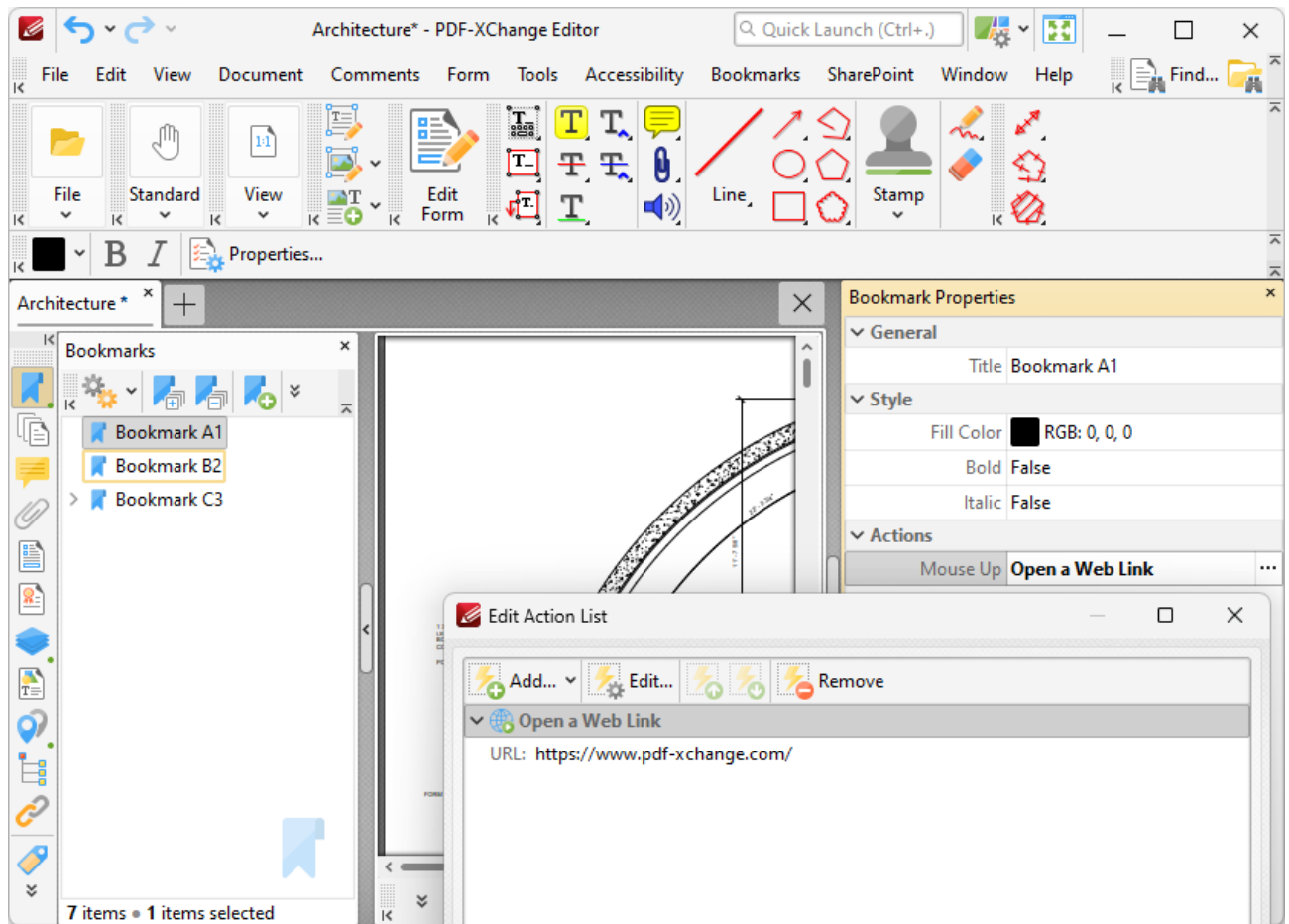
Figure 1. Edit Action List Dialog Box, Open a Web Link Action for Bookmark A1 Highlighted

2. Click the **Bookmarks** tab, then click **Add Text to Bookmark Titles.** The **Add Text to Bookmark Titles** dialog box will open.

3. Enter **%[URI]** in the **Add Suffix** text box:
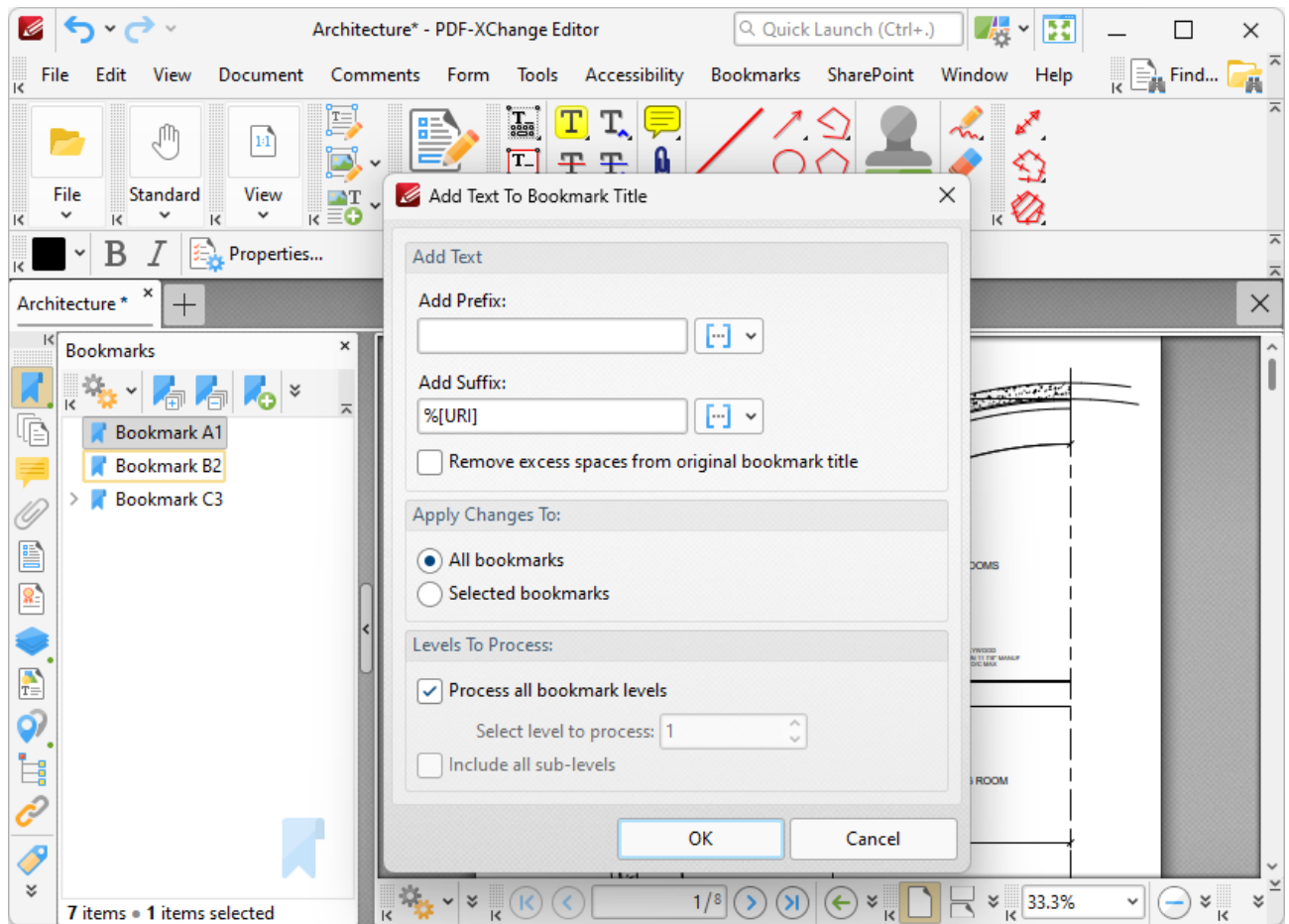
Figure 2. %[URI] Macro Example

4. Click **OK.** The URI link in the bookmark will then be added as a suffix to the bookmark title:
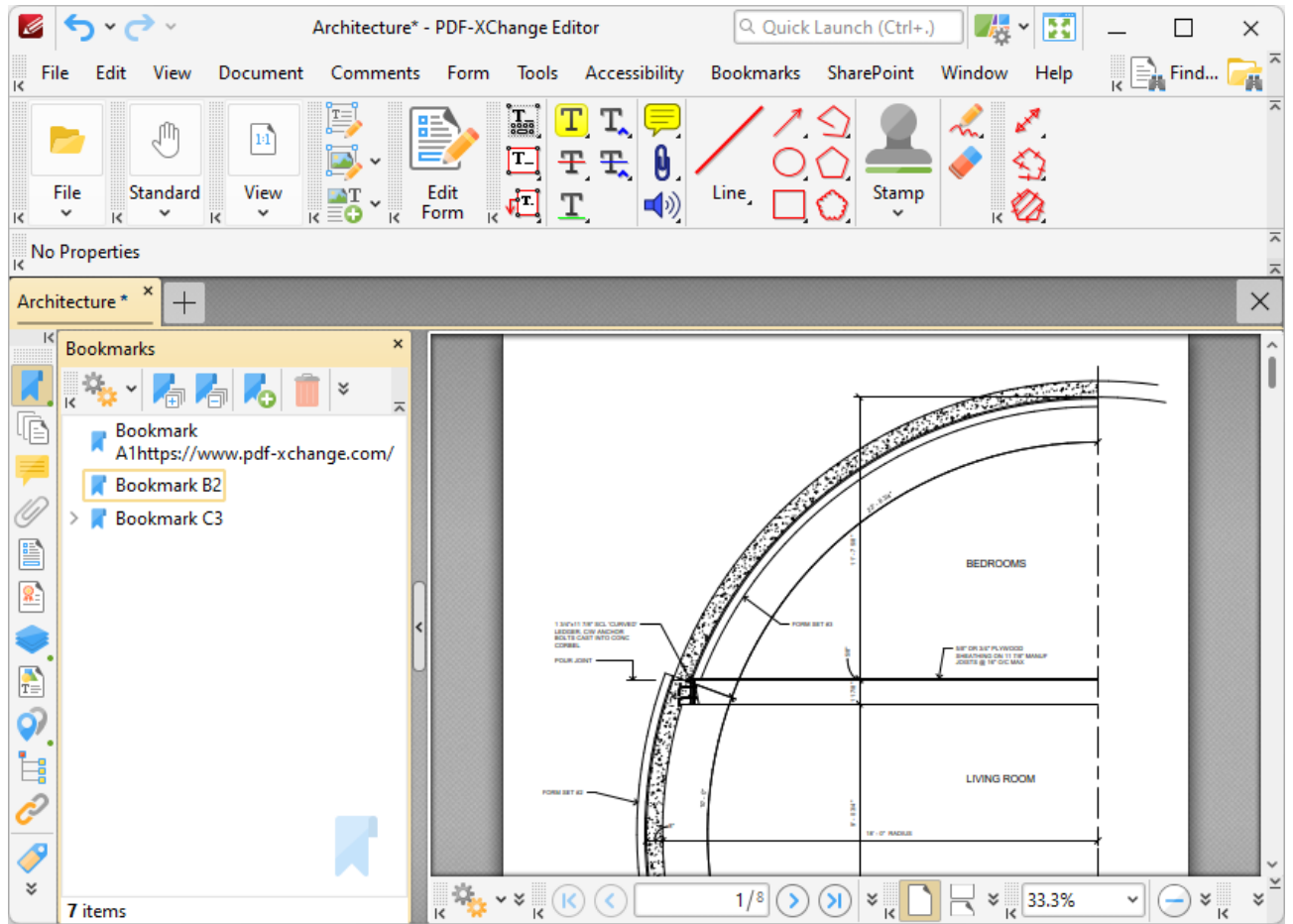
Figure 3. %[SeqNum] Macro Example Output

6.13.34 Year

 Year

The **Year** macro inserts the current year as a four-digit value.

The syntax for this macro is **%[Year]**

Example

Figure 1. %[Year] Macro Example

Note that this macro is often used in conjunction with other macros in order to create combined output. For example the combined macros **%[Time:H:mm] %[Date:dd MMMM] %[Year]** output the current time, date and year:
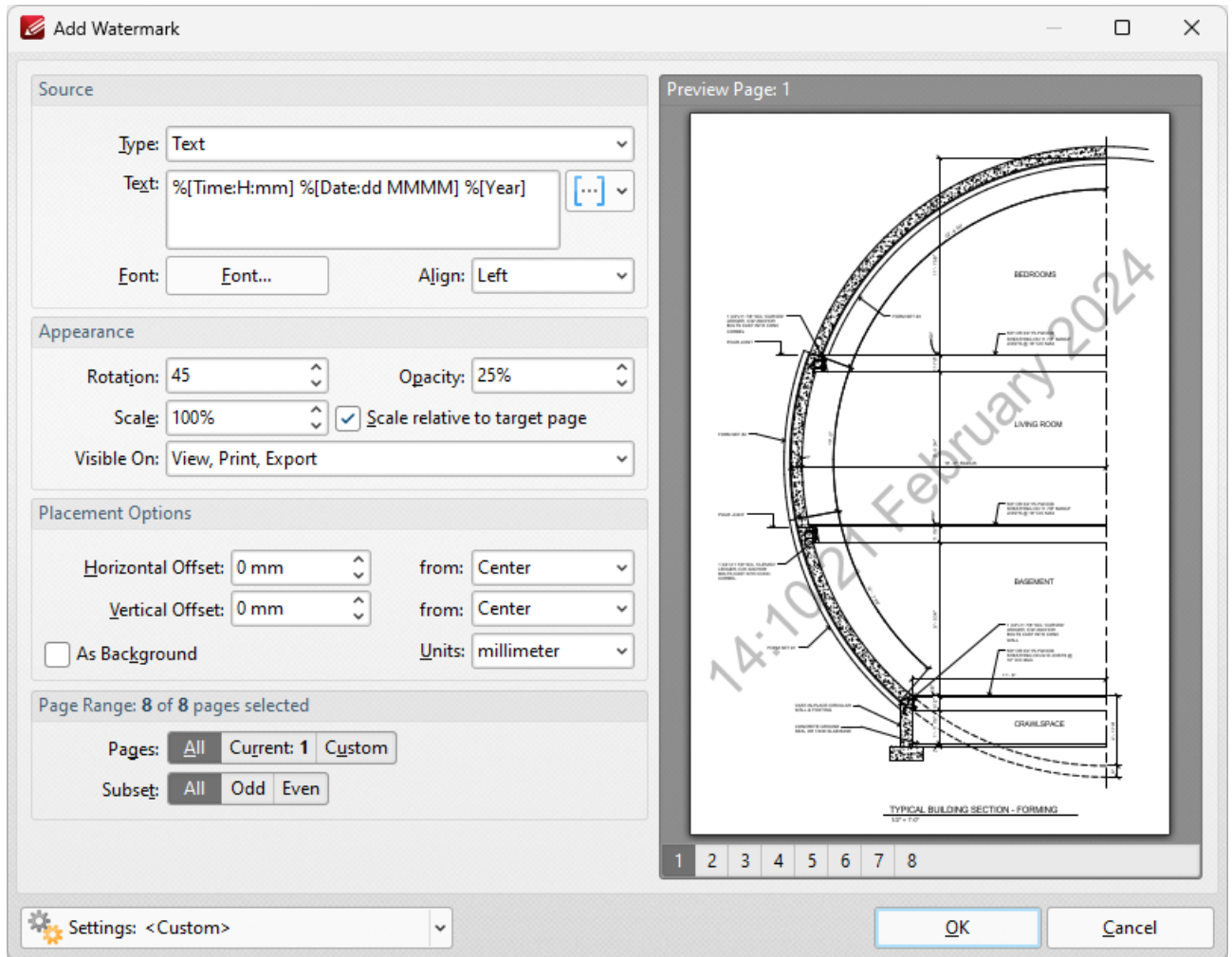
Figure 2. %[Year] Combined Macro Example

6.13.35   **Macro-Enabled Operations**

 Macro-Enabled Operations

Macros are available for the following operations:

OPERATION	LOCATION
Add Header and Footer	Document Tab> Header and Footer> Add
Add Bates Numbering	Document Tab> Bates Numbering> Add/Add to Multiple Files
Add New Stamp from File	Tools Tab> Comment and Markup Tools> Stamp Tool> Stamps Palette then click Add New and select a file to be used as a stamp, or click New Stamp from Active Document. The Add New Stamp dialog box will open. Macros can be used in the Stamp Title text box.
Add Text to Bookmark Titles	Bookmarks Tab> Add Text to Bookmark Titles
Add Watermarks	Document Tab> Watermarks> Add>. Macros can be entered in the Text text box.
Bookmark Every Nth Page	Bookmarks Tab> Bookmark Every Nth Page

Convert to Named Destinations	**Bookmarks Tab> Convert to Named Destinations**
Extract Pages	**Document Tab> Extract Pages**
Export to Images	**File Tab> Export to Images**
Launch Application	**Edit Tab> Preferences>** then select **Launch Applications** in the **Categories** menu and click **New.** The **New Launch Application** dialog box will open. Macros can be used in the **Parameters** text box. Note that a different set of macros is used for this feature. See **here** [271] for further information.
New Document 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.
New Document 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.
Summarize Comments	**Comments Tab> Summarize Comments.** Macros can be used in the **Filename** text box.

6.14   Page Boxes

Page Boxes

PDF documents feature five boxes that determine their content and appearance. They are the **Media Box, Crop Box, Bleed Box, Trim Box** and **Art Box:**
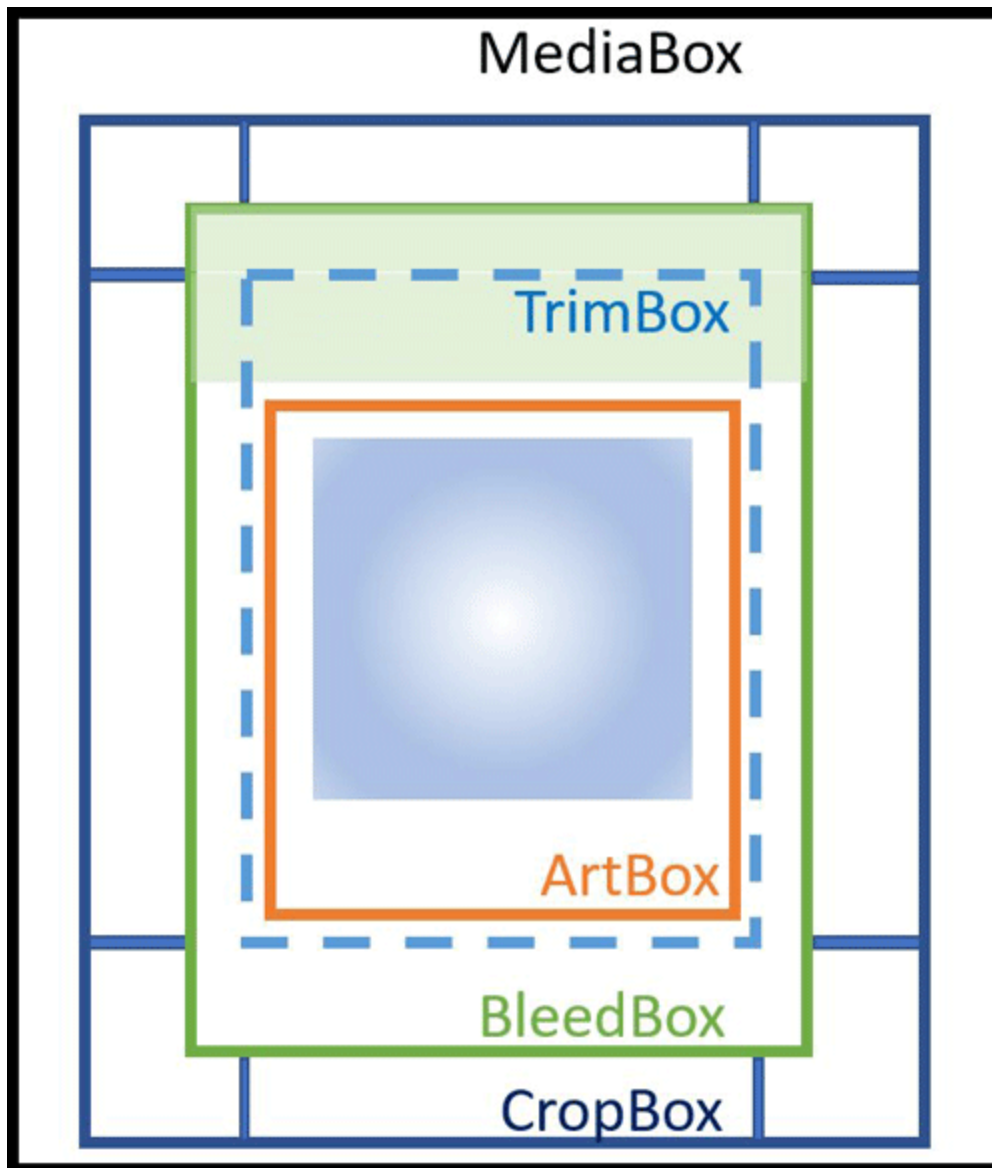
Figure 1. Document Boxes

PDF-XChange Editor uses four of these boxes:

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, 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 are 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 of the **Bleed Box** is the value of the **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 of the **Trim Box** is the value 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. The default value for the **Art Box** is the value of the **Crop Box.**

See **here** for further information on page boxes.

Note that the **Loupe Tool** 817 contains a feature that can be used to display page boxes.

6.15   Page Range Settings

Page Range Settings

Page range settings are available in many of the **PDF-XChange Editor** dialog boxes. Follow the rules detailed below to customize page ranges:

- Use commas to delimiter individual pages.
- Use hyphens to delimiter page ranges.
- Use commas to delimiter page ranges if multiple page ranges are being defined.
- Use a dash before a page number to determine all pages from the beginning of the document to the specified page. For example **-7** defines all pages from the beginning of the document to page seven.
- Use a dash after a page number to determine all pages from the specified page to the end of the document. For example **7-** defines all pages from page seven to the end of the document.
- Use the caret symbol (**^n**) to specify the document page that is n pages from the end of the document, or use (**^n-^n**) to specify a page range from the end of the document. For example, **^2** specifies the second-last page of the document, and **^1-^5** specifies the last five pages of the document.
- Note that when you are specifying a custom page range it is not necessary for the order of pages to be sequential, or for each value in the range to be unique.

Examples

1, 3, 5-7 will process pages 1, 3, 5, 6 and 7.
1, 3, 5-7, ^2-^1 (when applied to a document with ten pages) will process pages 1, 3, 5, 6, 7, 9 and 10.
3- will process all pages except the first two pages of the document.
-5, 7 will process pages 1, 2, 3, 4, 5 and 7.
-5, ^3-^1 (when applied to a document with ten pages) will process pages 1, 2, 3, 4, 5, 8, 9 and 10.

6.16   Read Out Loud Feature

Read Out Loud Feature

This feature of **PDF-XChange Editor** enables the software to "read out loud" document text:
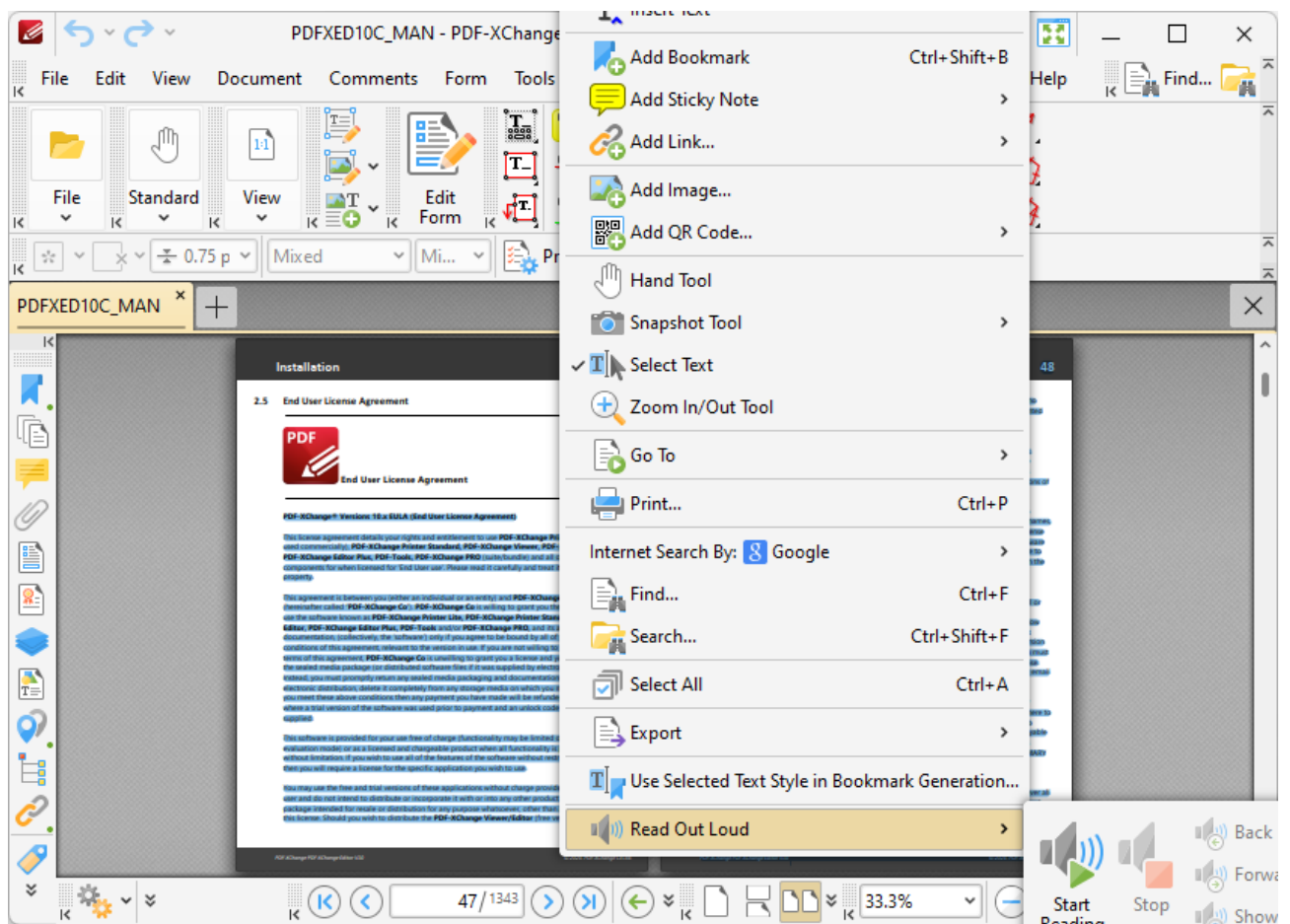
Figure 1. Right Click Shortcut Menu, Read Selected Text Out Loud

Follow the steps below to use this feature:

1. Open the document that contains the text.

2. Click **Select Text Tool** 811 in the **Standard Toolbar.** 488

3. Select the text to be read out loud.

4. Right-click the text.

5. Select **Read Out Loud Selected Text,** then click **Start Reading.**

6. The selected text will be read out loud according to the settings determined **here.** 307

7. Select **Stop Reading** to halt the process.

6.17 Removing Trial Watermarks

Removing Trial Watermarks

If licensed features are used without a license in **PDF-XChange Editor** then trial watermarks (and underlying links) will be added to the document:
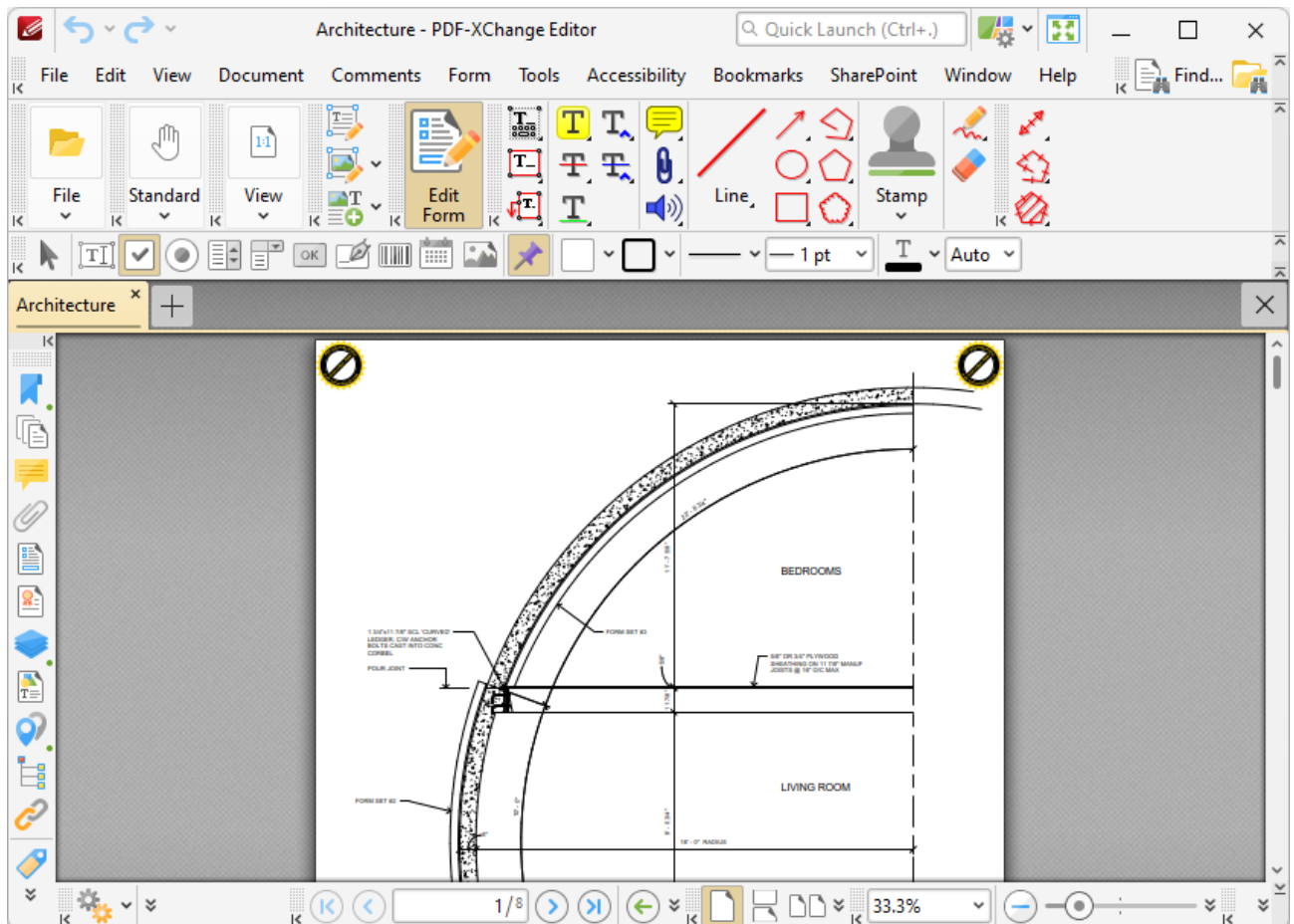
Figure 1. Trial Watermarks

Follow the steps below to remove this content from documents:

    1. Click the **Document** tab, then click the **Watermarks** dropdown menu and click **Manage:**
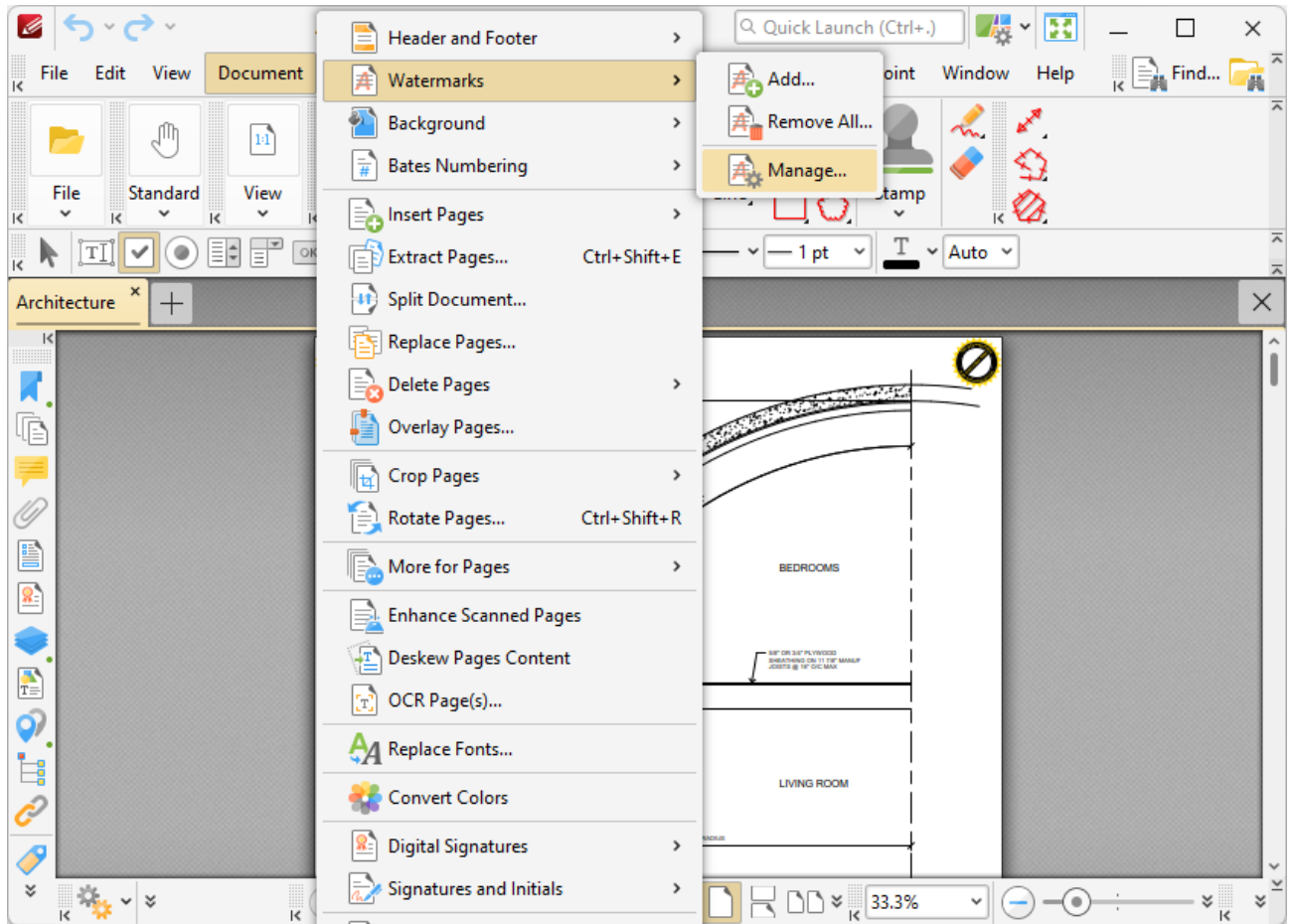
Figure 2. Document Tab, Watermarks Dropdown Menu, Manage

The **Manage Watermarks** dialog box will open:
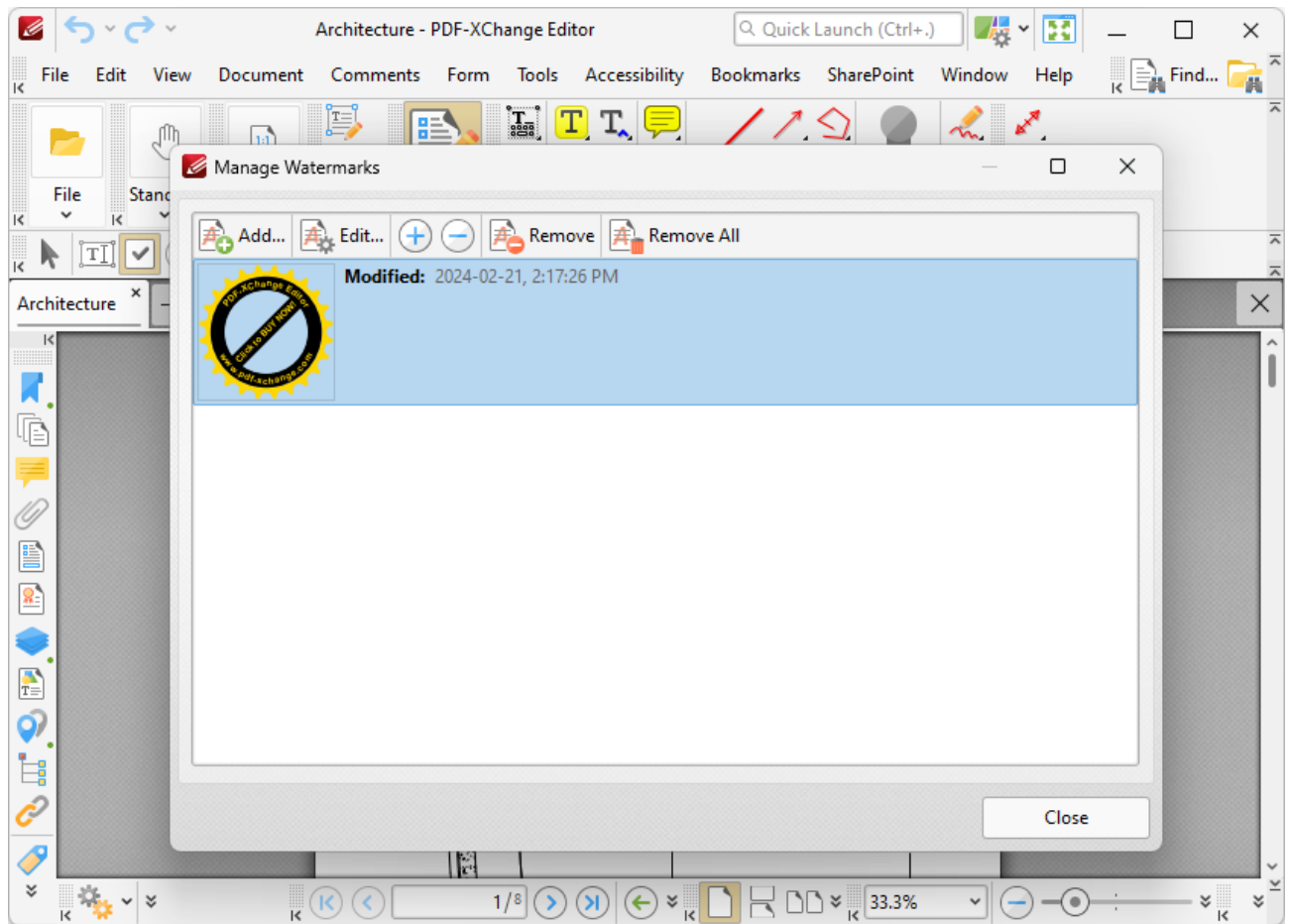
Figure 3. Manage Watermarks Dialog Box, Remove Highlighted

2. Select the trial watermark and then click **Remove.** The watermarks will then be removed from the document.

3. Click the **View** tab, then click the **Other Panes** dropdown menu and click **Links:**
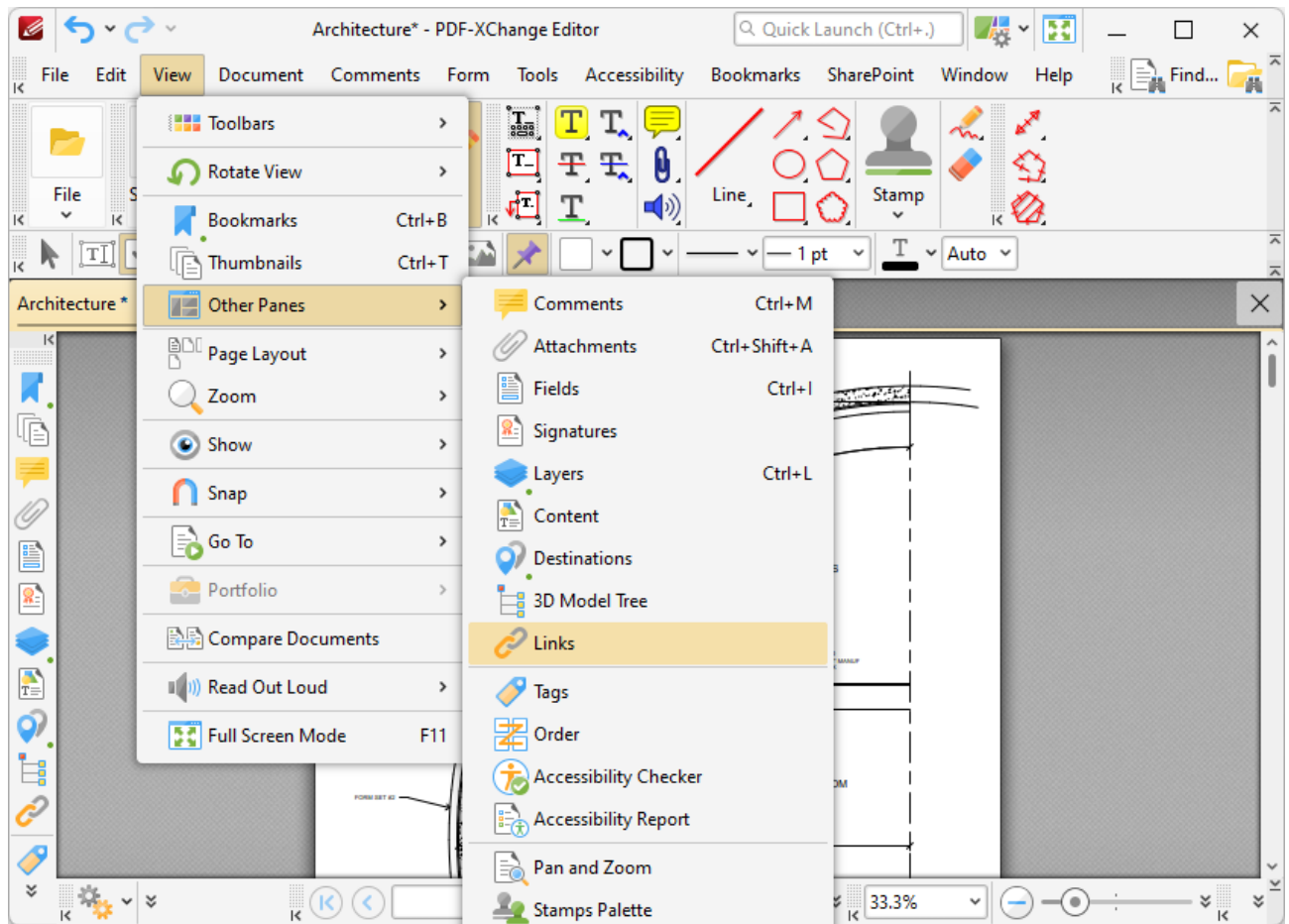
Figure 4. View Tab, Other Panes Dropdown Menu, Links

The **Links** pane will open:
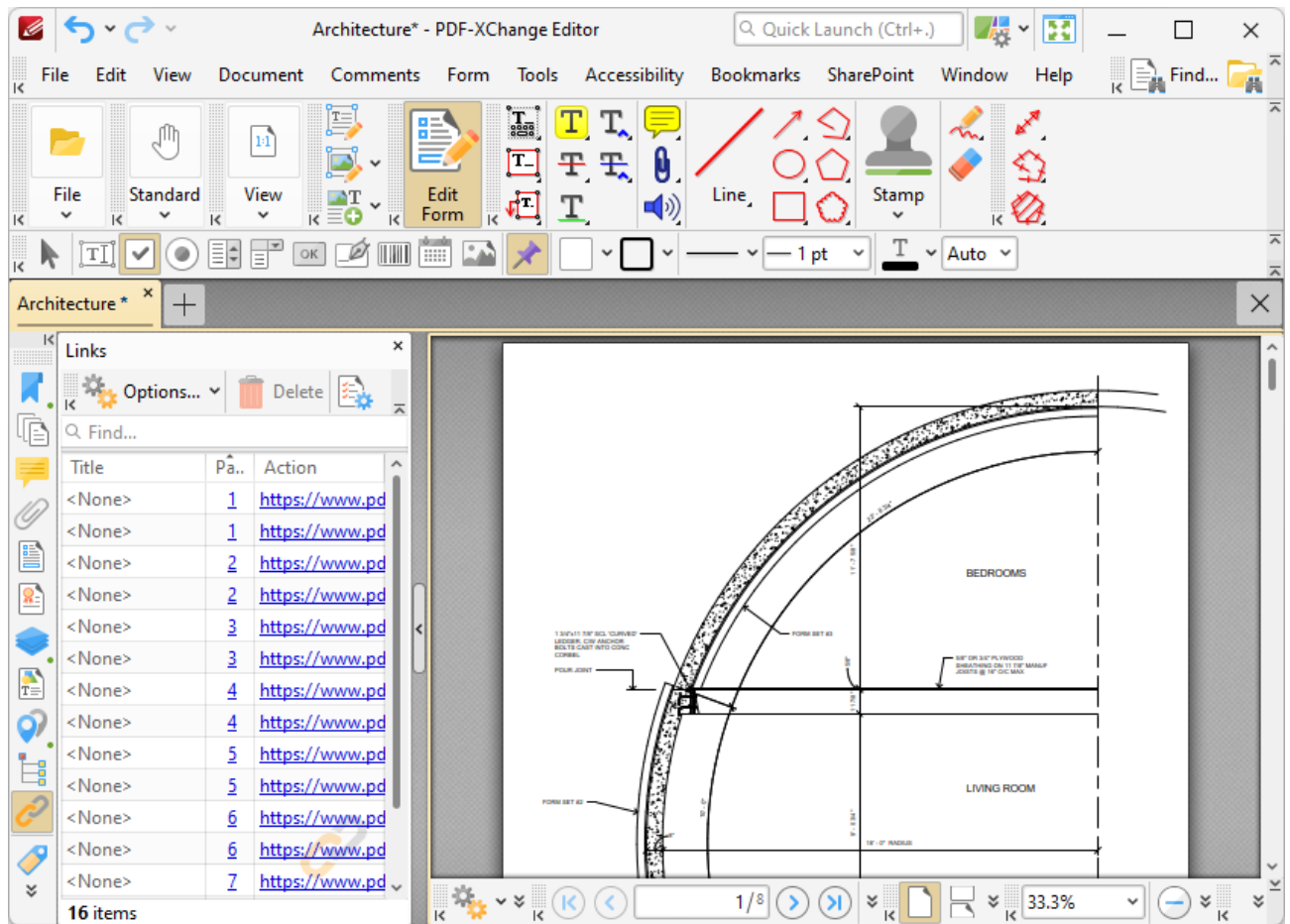
Figure 5. Links Pane, Trial Links Detailed

4. Select the trial links and then click **Delete:**
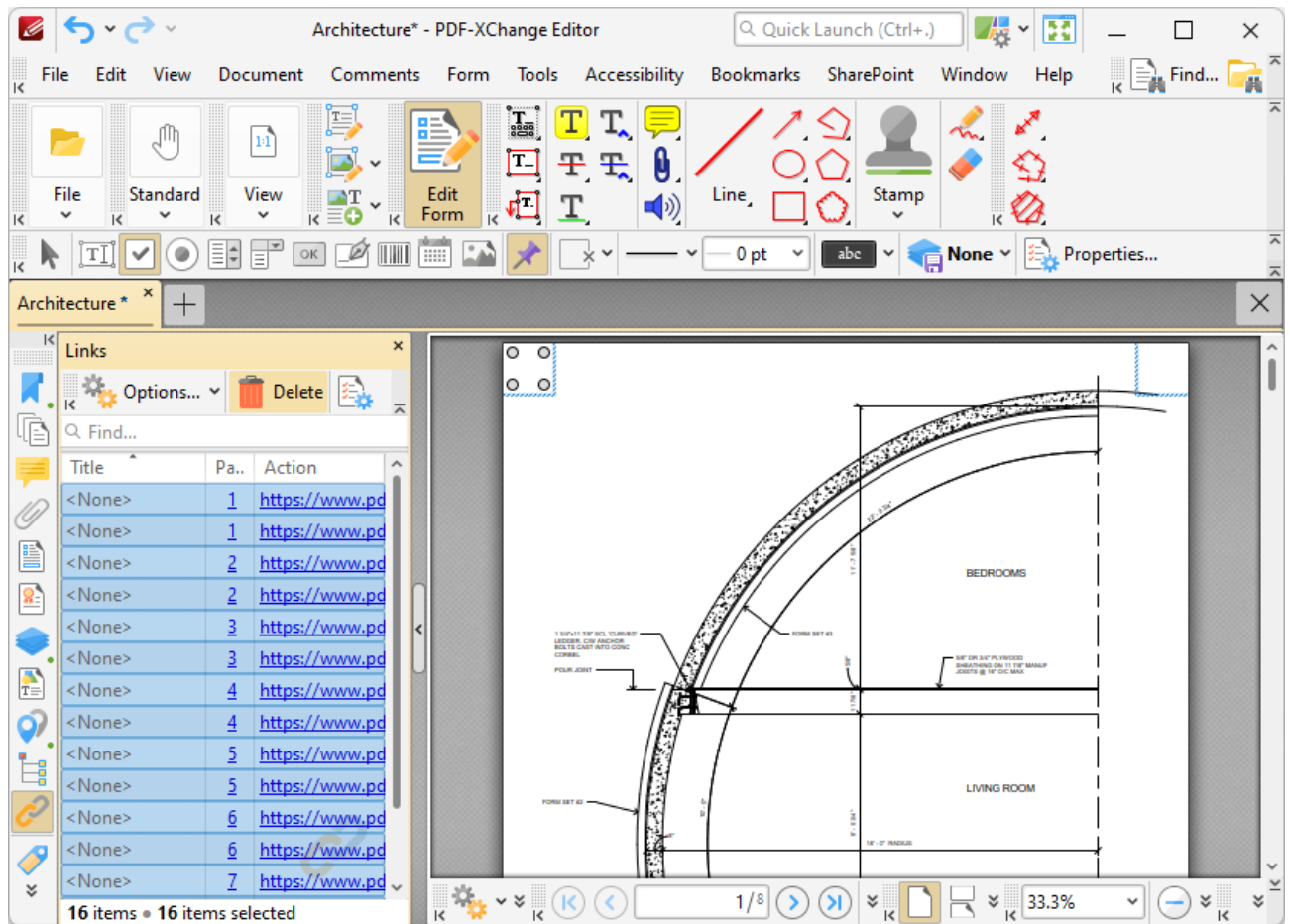
Figure 6. Trial Links Selected, Delete Highlighted

The links will then be removed from the document.

6.18 Removing Activations from a License

Removing Activations from a License

If you reach the maximum permitted number of activations for your license key, and would like to remove a machine from the license in order to free up a space for a new machine, you can follow the steps below to do so:

1. Log in to your **PDF-XChange** account **here.**

2. Go to the **Your Products and Serial Keys** tab, and then click **Activations List:**

The **Activations List** will open:

All machines that are currently registered on your license are detailed in the list.

  3. Click **Deregister** to deregister a machine from the Activations List, then click **OK** in the confirmation box to confirm the deregistration. A free space will then be available on your license to add a new machine.

Note that the license keys for **PDF-XChange** software are assigned a specific number of users, and each user is permitted to activate the license on two machines - a desktop PC and a laptop/touch-based device - provided that they are the primary user of both machines. For example, a five-user license key is permitted to be activated on ten total machines. When the activations limit is reached it is no longer possible to use the license key to activate the software on additional devices. If you want to do so then it is necessary to first remove a machine from your license, as detailed above.

6.19   Shell Extensions

Shell Extensions

PDF-XChange Editor features a **Windows** shell extension that causes thumbnails of PDF files to display in **Windows Explorer** when thumbnails are selected as the file display mode. The first page of PDF documents is displayed, instead of the standard PDF document icon, which makes the process of viewing/selecting files more efficient. Note that the folders must set to display medium, large or extra-large icons for the thumbnails to be visible:
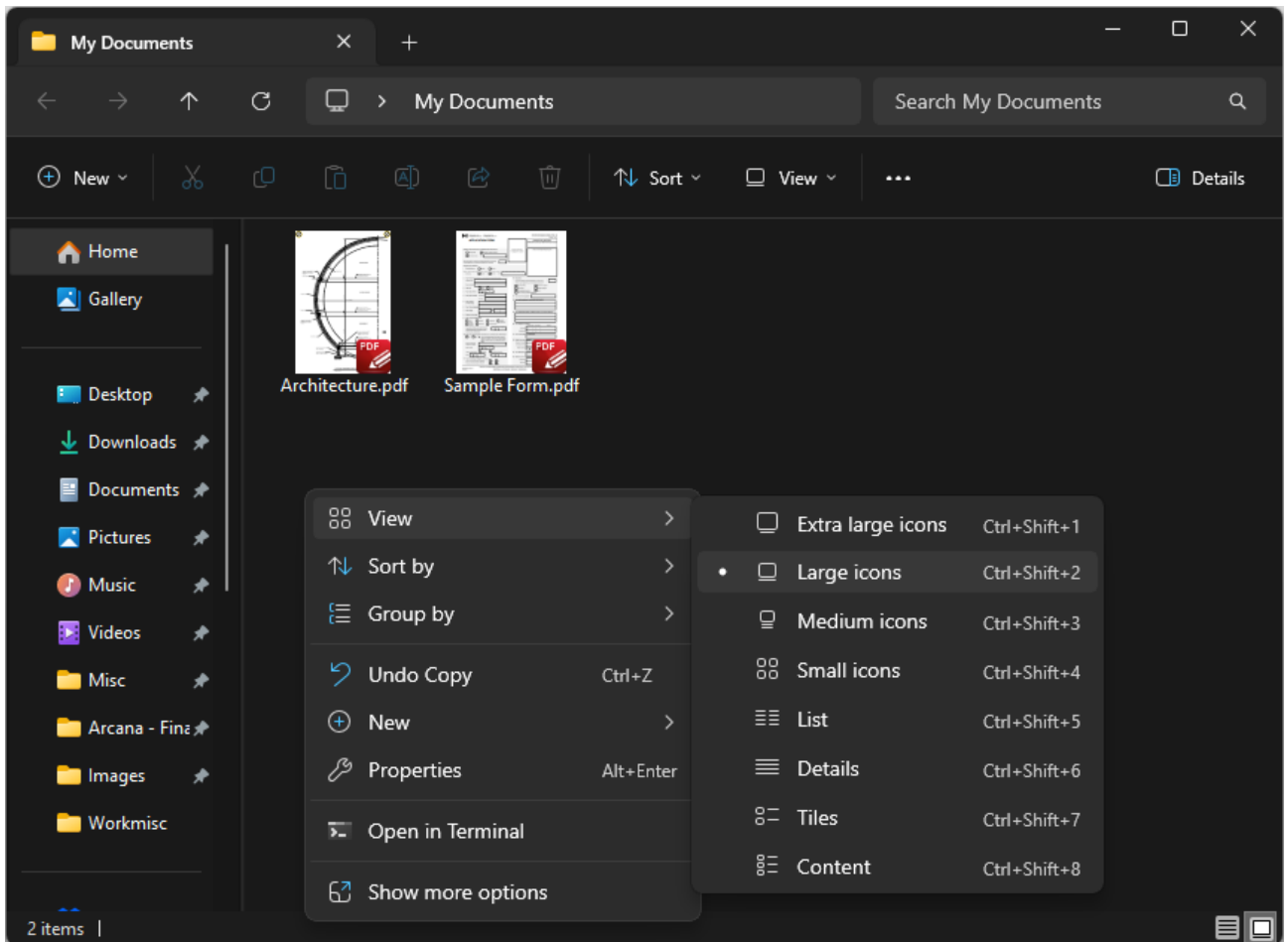
Figure 1. Shell Extensions Example

iFilter

The shell extension feature includes the **PDF iFilter,** which is a search tool. 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 the standard **Windows** search option is used. The **PDF iFilter** integrates into existing **Windows** operating systems and thus provides a convenient way to search text within PDF documents on the local computer and company network/intranet, as well as greatly increasing your ability to accurately locate many forms of information contained within your PDF documents.

View/Edit Shell Extension Settings

These settings are detailed on your machine at the following default location:

C:\Program Files\Tracker Software\Shell Extensions

If you want to view/edit shell extension settings, then please go to the folder above and then double-click **XCShInfoSetup.exe.** The **PDF-XChange Shell Extensions Setup** dialog box will open:
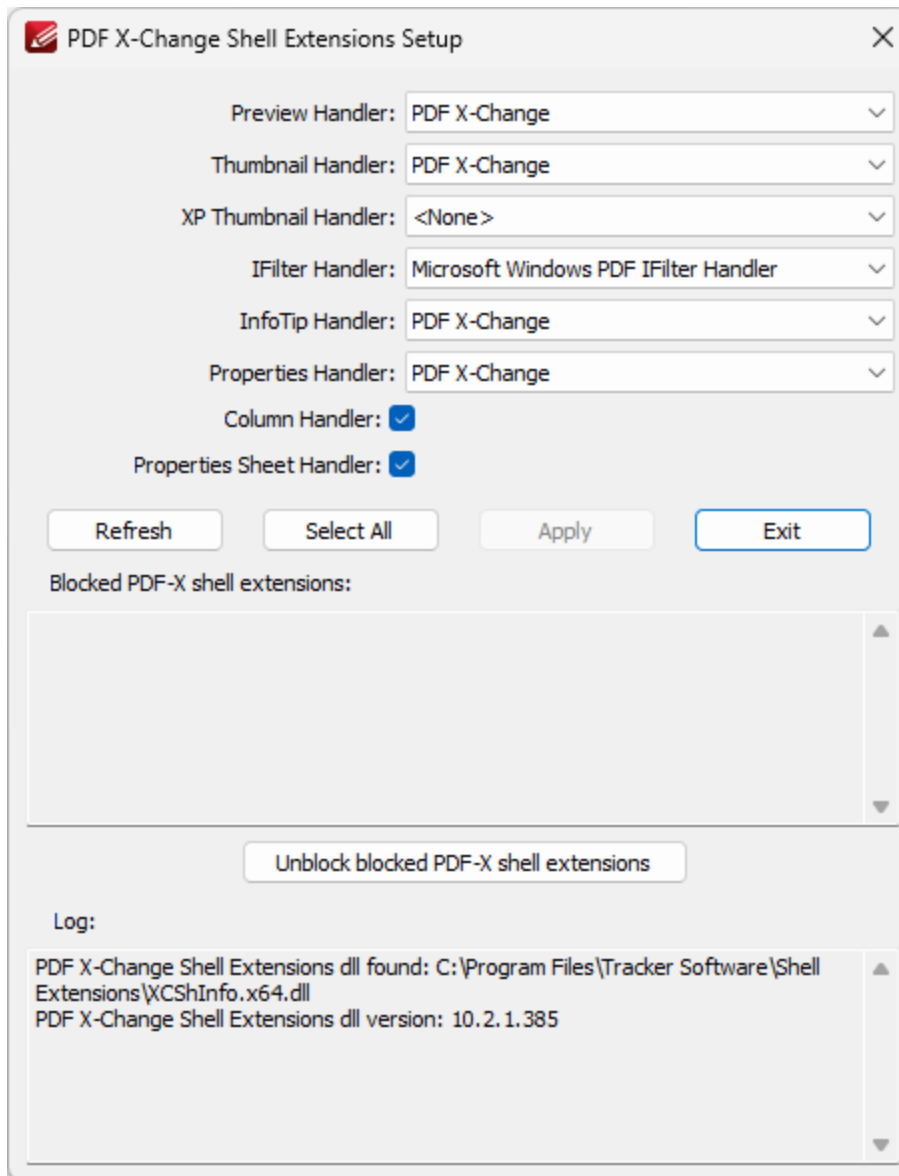
Figure 2. PDF-XChange Shell Extensions Setup Dialog box

The current handlers are detailed in the dropdown menus. Click the dropdown menus to select alternative handlers as desired, then click **Apply** to apply changes.

6.20   Text Editing Options

Text Editing Options

When tools that contain text options are being used, text-editing options are enabled in the **Properties Toolbar:** 485
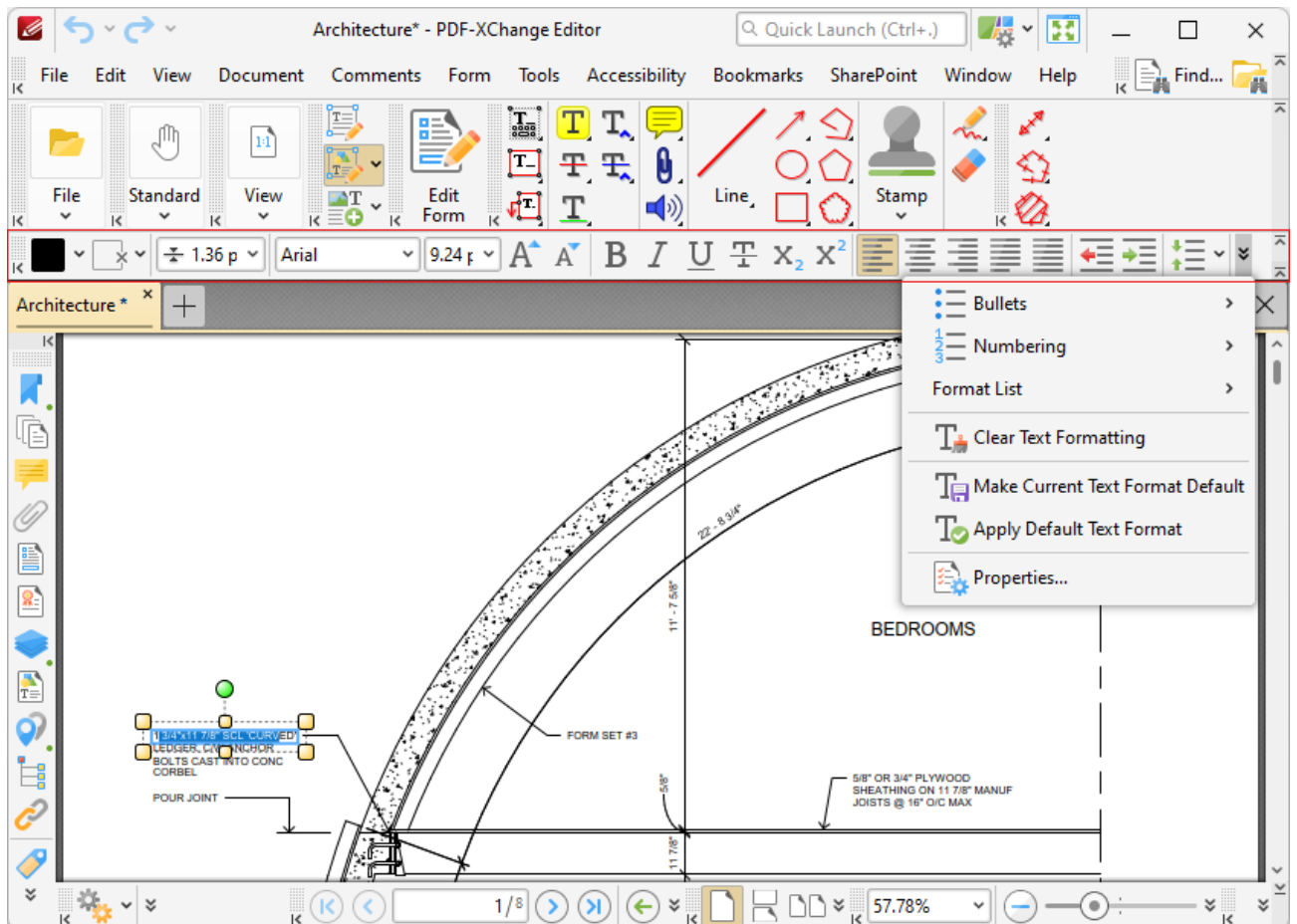
Figure 1. Properties Toolbar, Text Editing Options

The properties available depend on the active tool. All available properties are detailed below:

- **Fill Color** determines the text color.

- **Stroke Color** determines the color of the text border.
- **Border Width** determines the width of the text border.
- **Font** determines the text font.
- **Font Size** determines the font size.
- **Grow Font** increases the font size.
- **Shrink Font** decreases the font size.
- **Bold** emboldens text.
- **Italic** italicizes text.
- **Underline** underlines text.
- **Strikethrough** strikes text through.
- **Subscript** transforms text into subscript, which is used in special cases, such as chemical compounds.
- **Superscript** transforms text into subscript, which is used in special cases, such as mathematical formulae.
- **Align Text Left** aligns text to the left.
- **Center Text** centers text.
- **Align Text Right** aligns text to the right.
- **Justify Text** justifies text.
- **Clear Style** reverts selected text to the default style for the current tool.
- **Make Current Text Format Default** sets the current style as the default style for the current tool.
- **Apply Default Style** applies the default text style for the current tool to selected text.
- **Properties** opens the **Properties** 213 pane, which can be used to view/edit the properties of selected text.

Right-click text for further editing options:
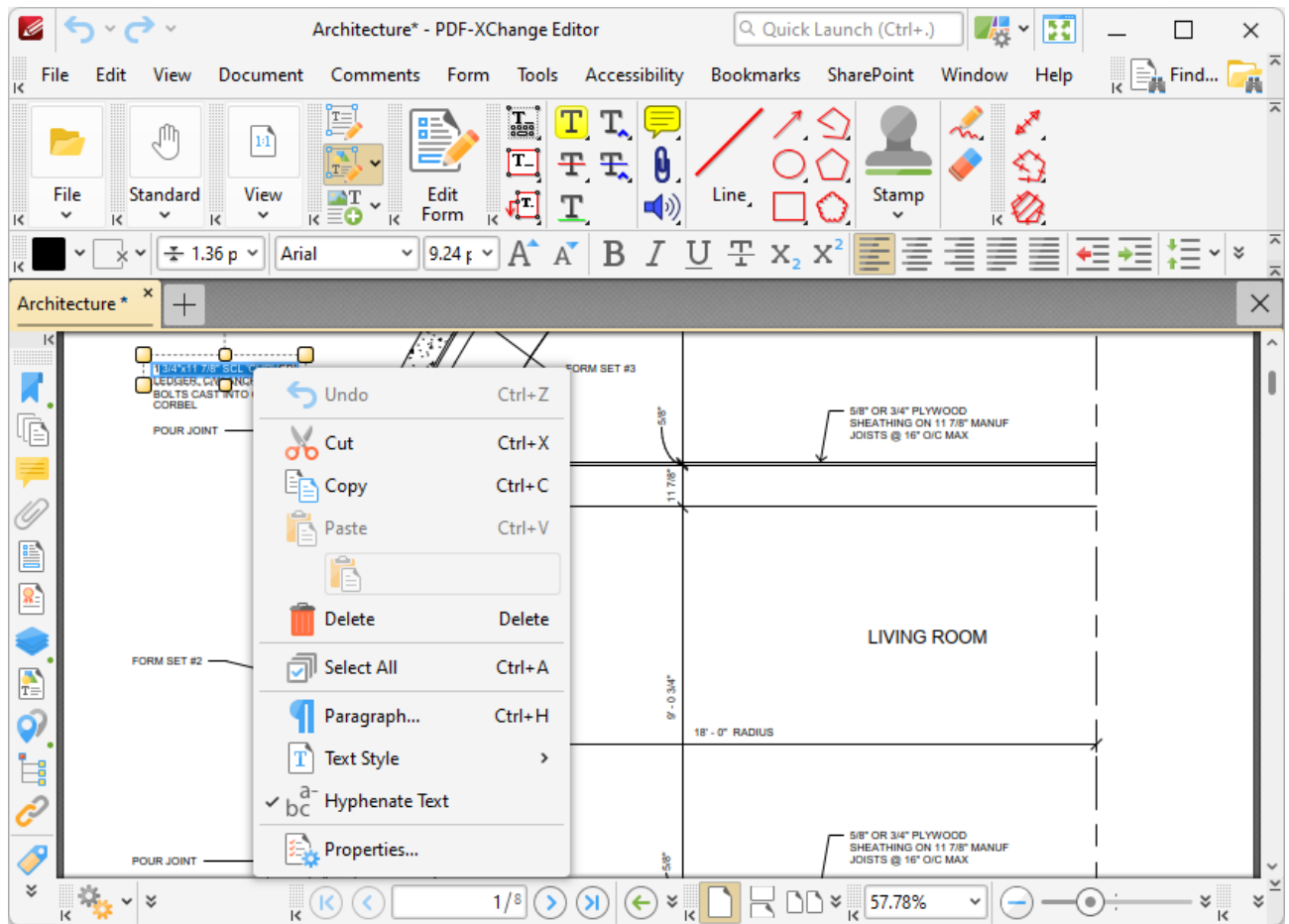
Figure 2. Right-Click Text-Editing Submenu

- Click **Undo** to undo the most recent editing action.
- Click **Cut, Copy, Paste** or **Select All** to perform these editing options on selected text.
- Click **Paste as Plain Text/Paste as Rich Text** to paste text in the clipboard as plain/rich text in the document.
- Click **Paragraph** to view/edit paragraph options:
  - Use the **Alignment** options to align text to the left/center/right or justify text.
  - Use the **Left** and **Right** indentation number boxes to determine the left and right indentation.
  - Use the **Special** dropdown menu to add indentation for the first line/hanging indentation.
  - Use the **Spacing** options to determine paragraph spacing.
- Click **Text Style** edit the style of selected text. The options in this submenu are detailed beneath *(figure 1)* except for the following two options:
  - Click **Copy Text Style** to copy the style properties of selected text. These properties can be viewed/edited in the **Properties** 213 pane.
  - Click **Apply Copied Text Style** to apply copied styles to selected text.
- Click **Hyphenate Text** to hyphenate text automatically when it crosses line endings.

6.21 Tool Properties

Tool Properties

The table below contains all properties available for the **PDF-XChange Editor** tools. Click **Properties** in the **Properties Toolbar** ⌐485¬ when tools are selected to view/edit tool properties in the **Properties** ⌐213¬ pane.

GENERAL	
PROPERTY	**DEFINITION**
Diameter	The **Diameter** property determines the diameter of the **Eraser Tool.**
Exclusive Mode	The **Exclusive Mode** property simplifies the process of using tools. When it is enabled, the pointer ignores all interactive elements of documents other than base content. This makes it possible to create content on areas that overlap with other content without the risk of accidentally selecting undesired items. When **Exclusive Mode** is disabled, the pointer recognizes and interacts with all underlying elements in the usual manner.
Inertial Scroll	The **Inertial Scroll** property is a dynamic scrolling option. When it is enabled, document pages will continue to scroll and come to a stop gradually after scrolling actions are performed. When it is disabled document pages will scroll in synchronization with the pointer.
Keep Selected	The **Keep Selected** property is an editing convenience for tools. When it is enabled tools will remain selected after they are used.

	When it is disabled the active tool reverts to the designated default tool after a single use.
STYLE	
Border	The **Border** property determines the border style of content.
Blend Mode	The **Blend Mode** property determines how content blends with underlying/overlapping content. Further information on this property is available **here.** ⌐1107⌐
Fill Color	The **Fill Color** property determines the fill color of content.
Highlight Mode	The **Highlight Mode** property determines the visual effect when links created using the **Link Tool** are selected.
Icon	The **Icon** property determines the icon that content uses.
Opacity	The **Opacity** property determines the transparency level of content.
Stroke Color	The **Stroke Color** property determines the border color of content.
Thickness Scale	The **Thickness Scale** property determines the thickness of strikeout and underline annotations.
Underline	The **Underline** property determines the underline style when the **Underline Text Tool** is used.
Width	The **Width** property determines the width of content.

DEFAULT TEXT FORMAT	
Font	The **Font** property determines the content font.
Font Size	The **Font Size** property determines the content font size.
Text Alignment	The **Text Alignment** property determines the content text alignment.
Text Color	The **Text Color** property determines the content text color.
OTHER	
Decimal	The **Decimal** property determines the symbol used as the decimal separator for the **Measuring Tools.** 969
End	The **End** property determines the style of line endings.
End Scale	The **End Scale** property determines the scale used for line endings.
Group	The **Group** property determines the symbol used as the group separator for the **Measuring Tools.** 969
Inline Caption	The **Inline Caption** property determines whether or not captions are inline captions. If this option is enabled then captions are placed inside annotations instead of on top of annotations.
Leader Extension	The **Leader Extension** property determines the length of optional lines that extend from leader lines when using the **Line/Arrow/Distance Tool.**
Leader Length	The **Leader Length** property determines the length of leader lines.

Leader Offset	The **Leader Offset** property determines the length of the offset between the pointer and leader lines.
Precision	The **Precision** property determines the precision with which scale conversions are displayed with the **Measuring Tools.** ⌐969⌐
Read Only	The **Read Only** property is the "read only" status of comments/form fields. If this property is enabled then user-editing is disabled. Please note that it is necessary to use JavaScript to change the value of this property in the case of comments.
Scale	The **Scale** property determines the scale used for content.
Show Caption	The **Show Caption** property determines caption visibility in the **Line/Arrow/Distance Tool.** When it is enabled, the content of annotations pop-ups is displayed in text format above the baseline. When it is disabled, this content is not displayed.
Start	The **Start** property determines the style at the beginning of lines.
Start Scale	The **Start Scale** property determines the scale used at the beginning of lines.
Subject	The **Subject** property determines the content subject title. Note that it is not possible to edit this property in all tools.
Subject Kind	The **Subject Kind** property determines the content subject value: • **Custom** renders a custom value for the subject. Enter the desired value in the **Subject** text box. • **Default** renders the default subject value. • **Global** renders the global subject value. Use the **Subject** text box to enter a new global subject value. All tools that feature a global option in their **Subject Kind** property will then be updated with the same information.

7   PDF-XChange Lite User Manual

PDF-XChange Lite V10 User Manual

PDF-XChange Lite V10 is the lite version of our best-selling software for the creation and virtual printing of industry-standard PDF files - **PDF-XChange Standard V10.** It's compatible with files from almost all Windows applications such as **MS Word, Excel** and **AutoCAD. PDF-XChange Lite** 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.

PDF-XChange Lite installs as a virtual printer that generates fully-compatible, industry-standard, native PDF files. The files that **PDF-XChange Lite** creates feature searchable text, which greatly increases the efficiency of searching, selecting and editing files.

After **PDF-XChange Lite** has been installed, select files to print virtually and click **Print**. Select **PDF-XChange Lite** when prompted on which printer should be used. Files will then print virtually. There are several adjustable settings that determine the parameters of created documents. For example, it is now possible for documents to retain the name of the document from which they were created, and macros have been introduced to increase workflow efficiency.

The **PDF-XChange Lite User Manual** is composed of the following sections:

- **Features Overview** details the main features of the software.
- **PDF-XChange Lite Printer Settings** details the product settings, and is structured to match the UI of the software.

Note that the icons in the upper left of the screen can be used to browse/search the manual:
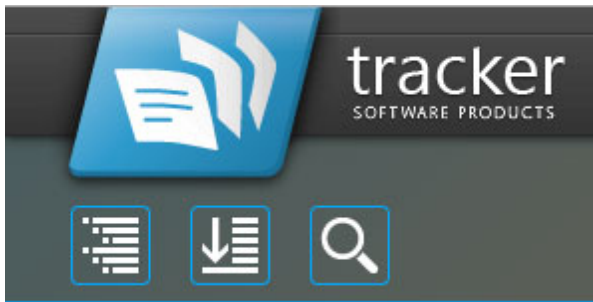
 Click the **Table of Contents** to view/move to chapters of the manual.

 Click the **Keyword Index** to view keywords, and click keywords to move to their location in the manual.

 Click **Search Topics** to enter custom search terms.

7.1 Features Overview

Features Overview

PDF-XChange Printer Lite is a reduced version of **PDF-XChange Printer Standard** that contains basic features for use when printing documents virtually. It combines high quality conversion with optimized compression to create professional documents that are comparatively small in size. The main features of **PDF-XChange Printer Lite** are detailed below:

- **Hybrid Conversion Engine** that prints to both **GDI** and **XPS.** Use the **Driver Mode Rules** to designate **GDI** or **XPS** printing for specified printing applications as desired.
- **Document Information** options that support both basic and advanced settings, including the option to add XMP Metadata, when documents are printed.
- **Font Embedding** to ensure compatibility on all computers. Chinese, Japanese and Korean fonts are now also available.
- **Enhanced Saving** options that determine how files are saved/named, including **macro** [1322] functionality that increases workflow efficiency and dynamism.
- **Language** options that support a wide range of languages.
- **Paper Properties** that offer dynamic options for paper size, resolution, scaling and output.
- **Custom Forms** can be created and saved for subsequent use.
- **Mirrored Printing** and **Mixed Raster Content (MRC)** support.

7.2   PDF-XChange Printer Lite Settings

PDF-XChange Printer Lite Settings

Follow the steps below to view/edit printer settings in **PDF-XChange Printer Lite:**

> 1. Enter 'printers & scanners' in the **Windows Search Box,** then click **Printers &
> scanners** in the search results:
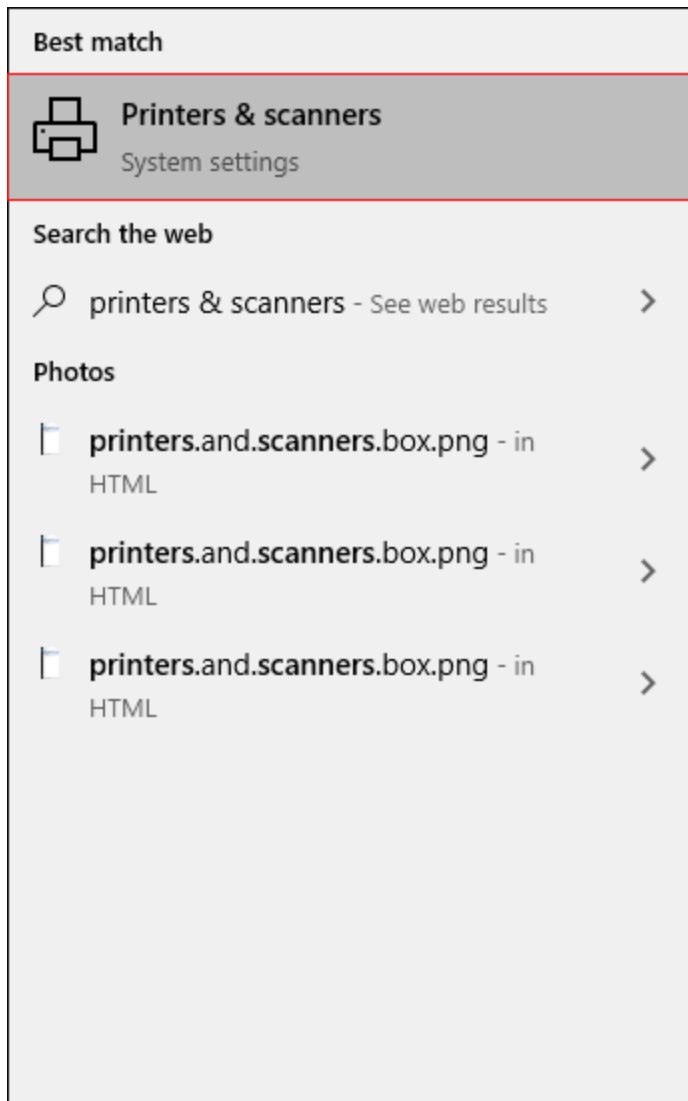
Figure 1. Windows Search Box Results

The **Printers & scanners** tab will open.

2. Click **PDF-XChange Lite,** then click **Manage:**
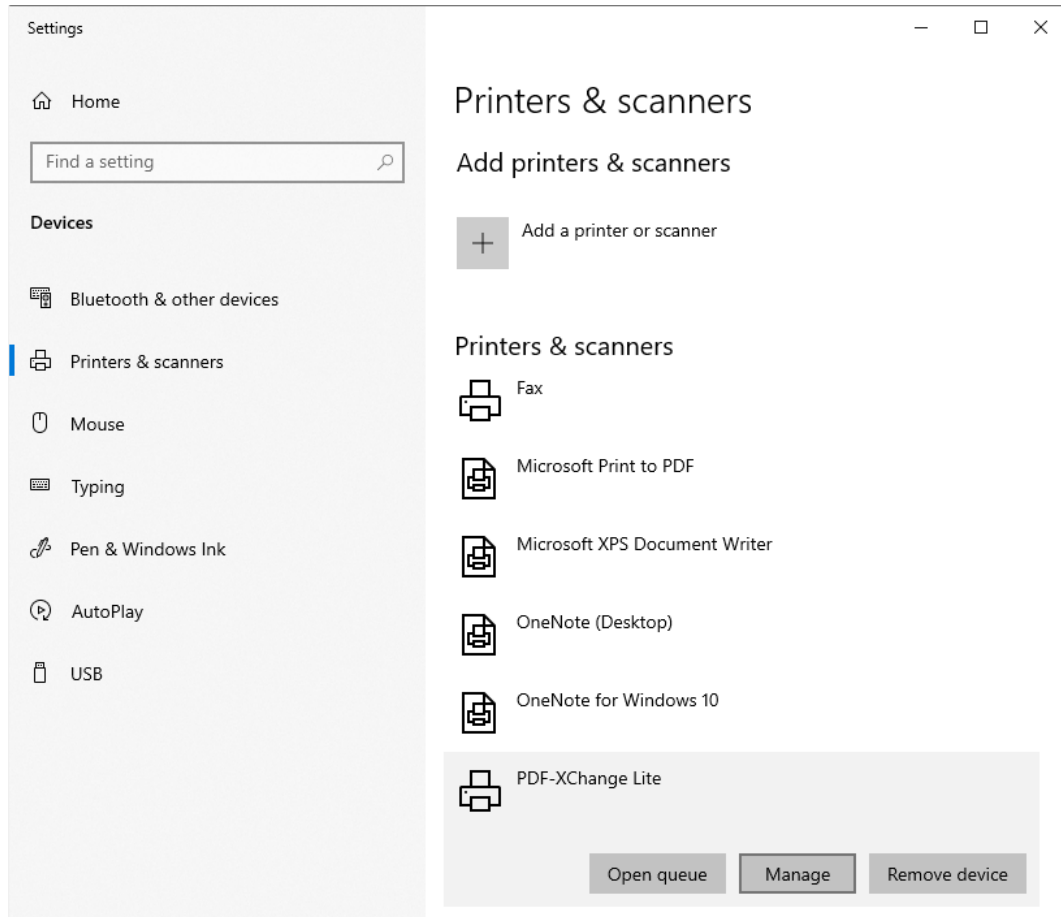
Figure 2. Printers & scanners Tab

The **PDF-XChange Lite** tab will open.

3. Click **Printing Preferences:**
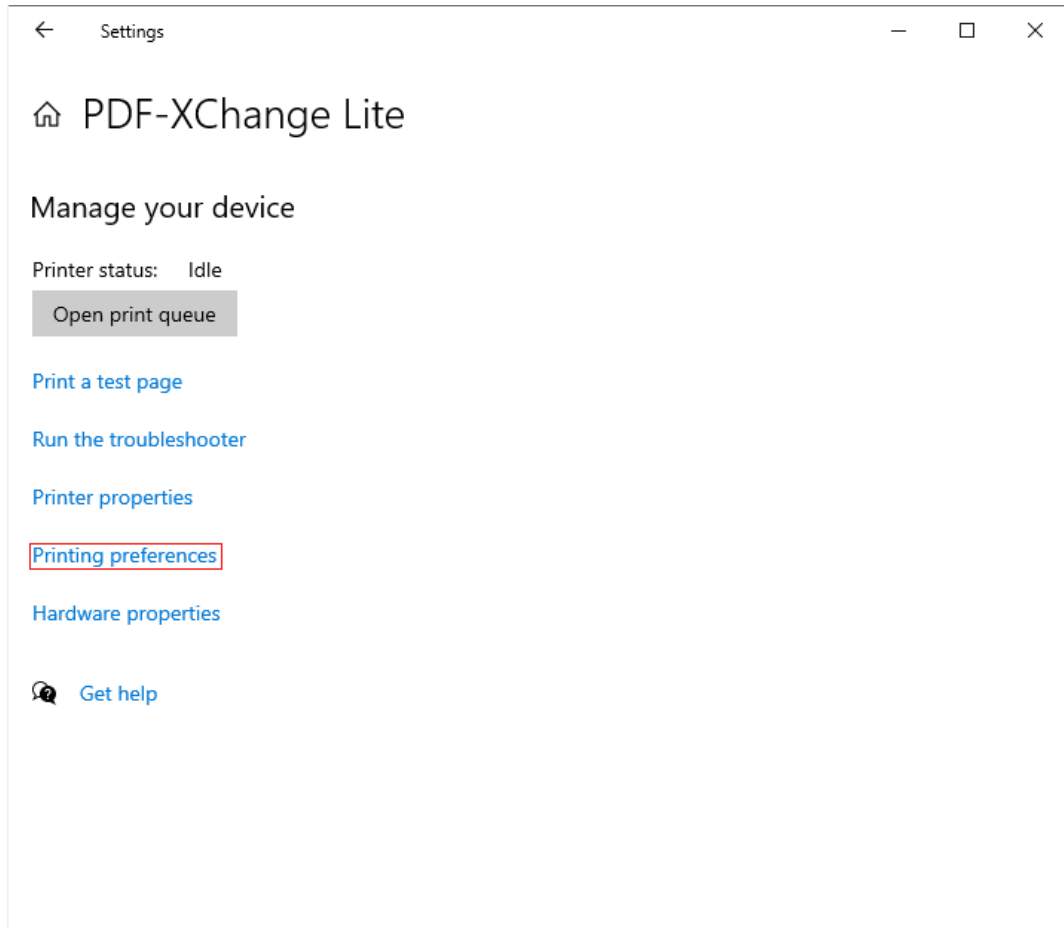
Figure 3. PDF-XChange Lite Tab, Printing Preferences

The **PDF-XChange Lite Printing Preferences** dialog box will open. These settings are used to determine all options in **PDF-XChange Lite:**
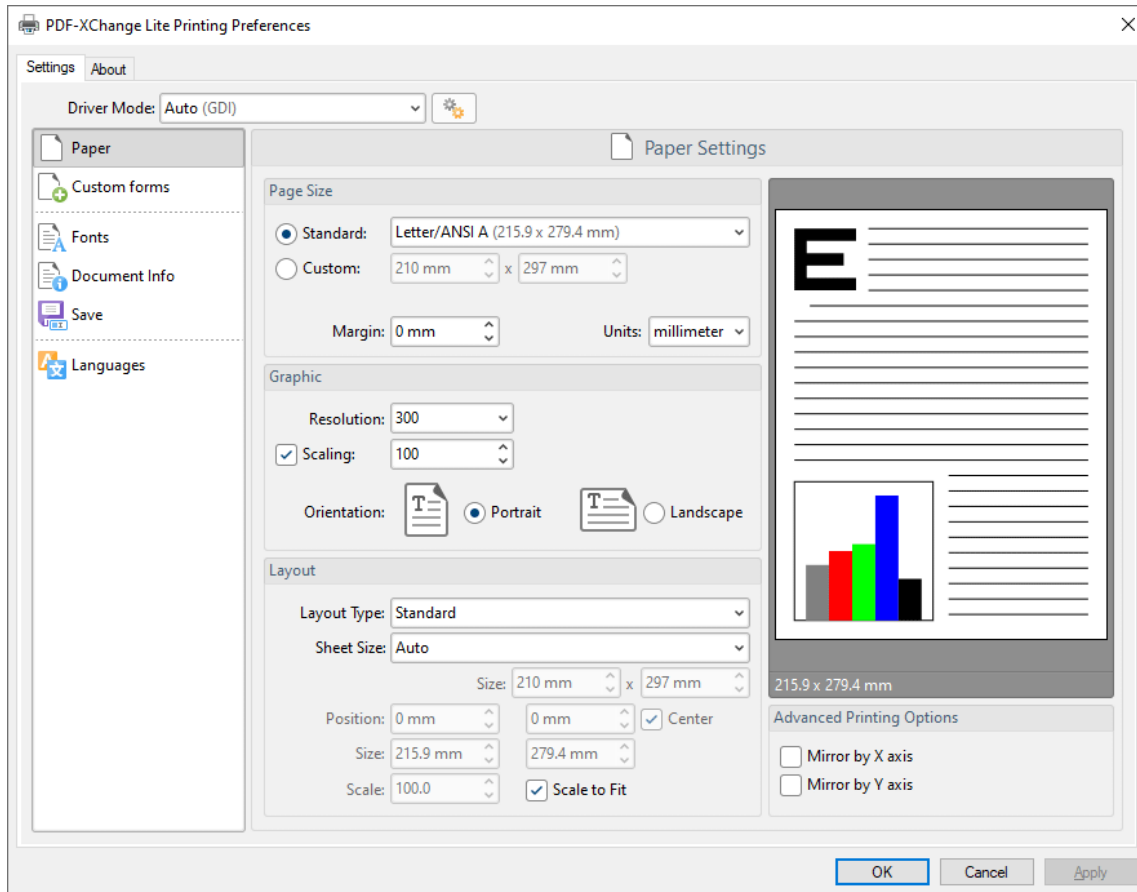
Figure 4. PDF-XChange Lite Printing Preferences Dialog Box, Settings Tab Highlighted

6. Use the **Settings** tab to view/edit settings. All sections are detailed below:

- **Paper** 1304
- **Custom Forms** 1313
- **Fonts** 1316
- **Document Info** 1318
- **Save** 1320
- **Languages** 1329

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.

7.2.1 **Paper**

Paper

The **Paper** settings are used to determine the size, orientation, margin, scaling factor, layout and printing order of pages, and the DPI (resolution) of images. Please note that some programs, such as **Microsoft Word**, override the properties determined in the **Paper** settings. This is because they use values determined within their own parameters and give those values priority over the options in **PDF-XChange Printer Lite.**

Click **Paper** in the **Settings** tab to customize paper settings:
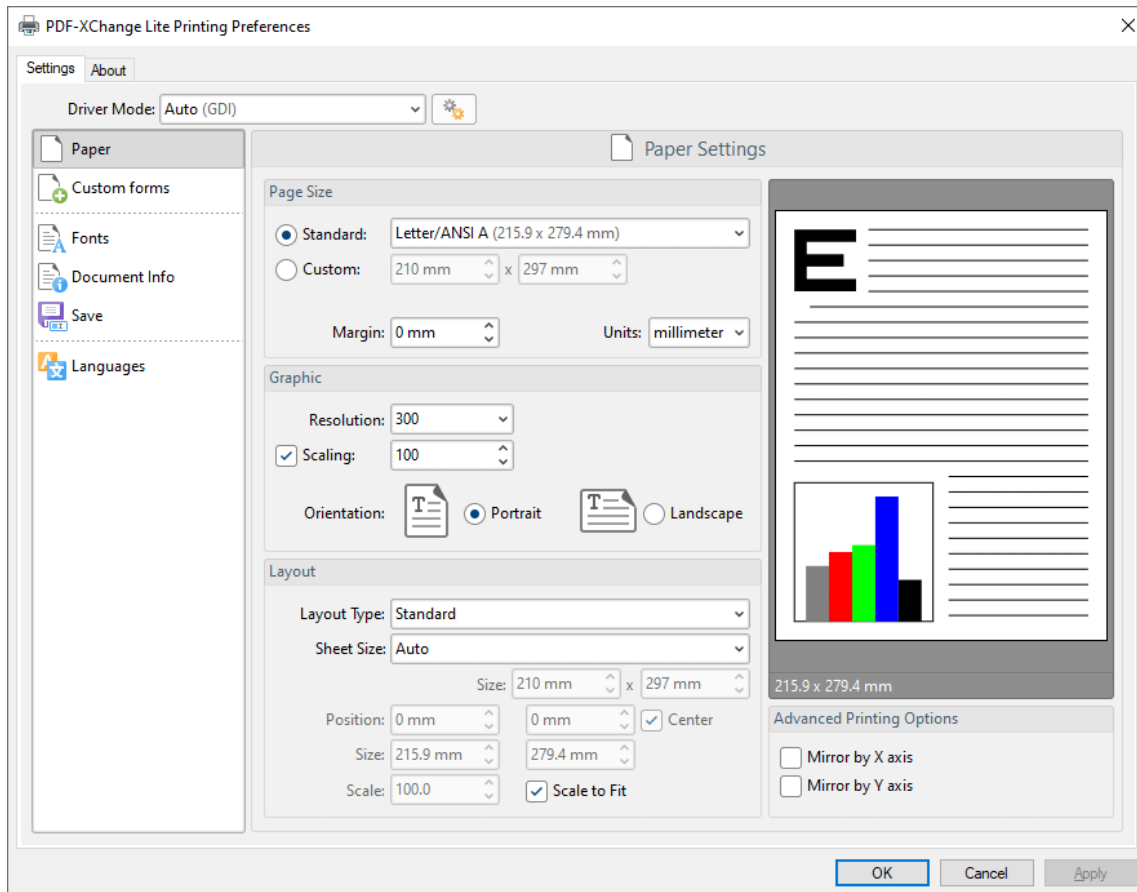
Figure 1. Paper Settings Dialog Box

Page Size

- **Standard** features industry-standard standardized sizes.
- **Custom** enables custom dimensions (to a maximum of two hundred inches). Use the number boxes to determine document dimensions. Use the dropdown list to determine the units of measurement.
- **Margins** adjusts the size of document margins.

Please note that **AutoCAD** may present issues when printing, especially when it plots to virtual print drivers such as the **PDF-XChange Printer Lite** print driver. 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

- **Resolution** is measured in **DPI** (dots per inch). Use the **Resolution** number boxes to determine **DPI**. (Increasing **DPI** usually decreases file size).
- **Scaling** determines the size of converted documents in relation to original content.
- **Orientation** sets **Portrait** or **Landscape** as the page orientation.

Page Layout

- **Standard** layout features one page per PDF page. See **here** 1307 for further options.
- **Booklet** layout features adjacent pages and is used for booklets and similar documents. See **here** 1309 for further options.
- **Multiple Pages Per Sheet** features multiple document pages per PDF page. Select a value to view the layout in the preview window. See **here** 1311 for further options.

Sheet Size

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions.
- The remaining options are industry-standard dimensions.

Advanced Printing Options

- Select **Mirror by X Axis** to print a mirror version of the document that is reversed on the horizontal axis.
- Select **Mirror by X Axis** to print a mirror version of the document that is reversed on the vertical axis.

Click **OK** to save changes.

7.2.1.1 Standard Layout

 Standard Layout

The **Standard** layout is used to print one document page per PDF page. The options detailed below are available when **Standard** is selected in the **Layout Type** dropdown menu:
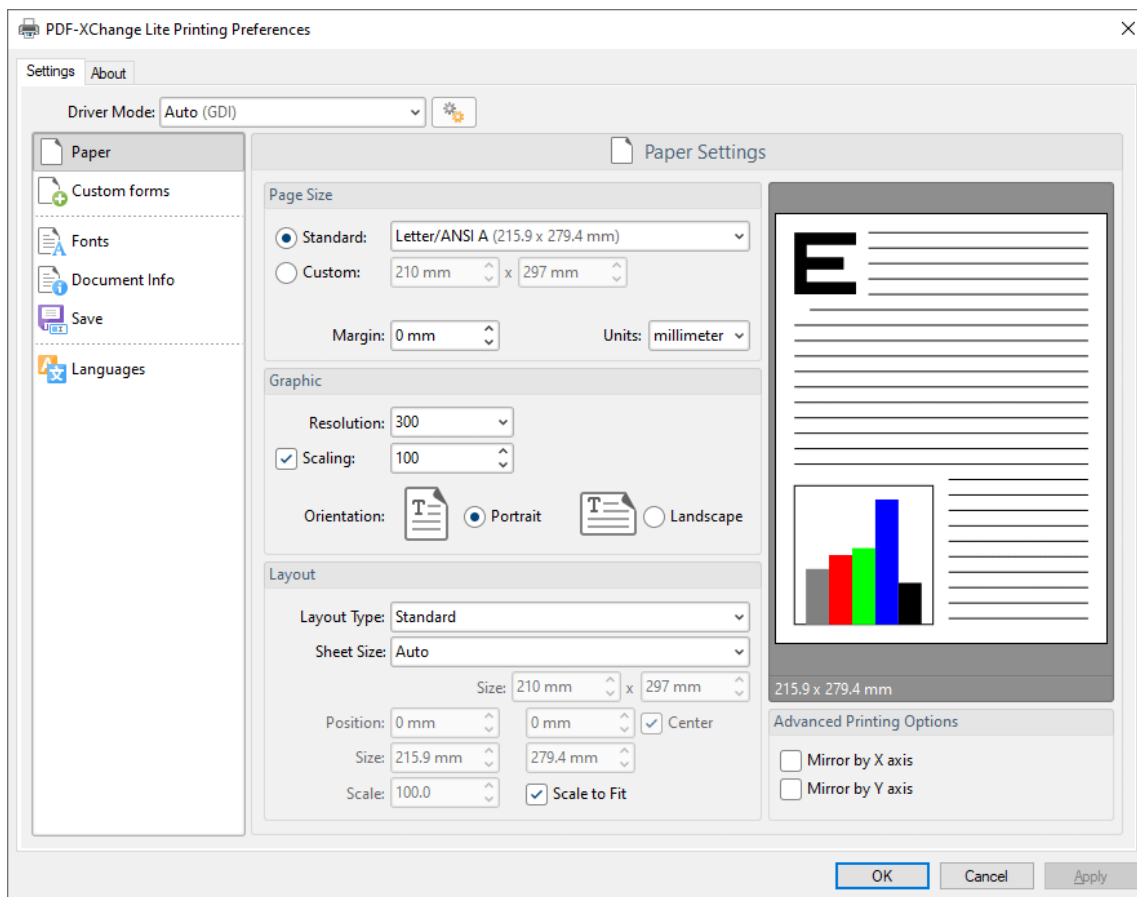
Figure 1. Paper Settings Dialog Box, Layout Type Dropdown Menu Selected, Standard Option

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.

- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.
- The remaining options are industry-standard dimensions.

Further Options

- If the **Scale To Fit** box is selected then layout options scale to the page size. Clear the box to disable this setting and then enter values in the **Size** and **Scale** number boxes or use the preview pane to resize pages.
- If the **Center** box is selected then documents are centered on the page and will remain centered when the size is adjusted. Clear the box to disable this setting and then enter values in the **Position** number boxes to determine page position.

Click **OK** to save changes.

7.2.1.2 Booklet Layout

Booklet Layout

The **Booklet** layout is used to print booklets and similar documents. When it is selected in the **Layout Type** menu the following options are available:
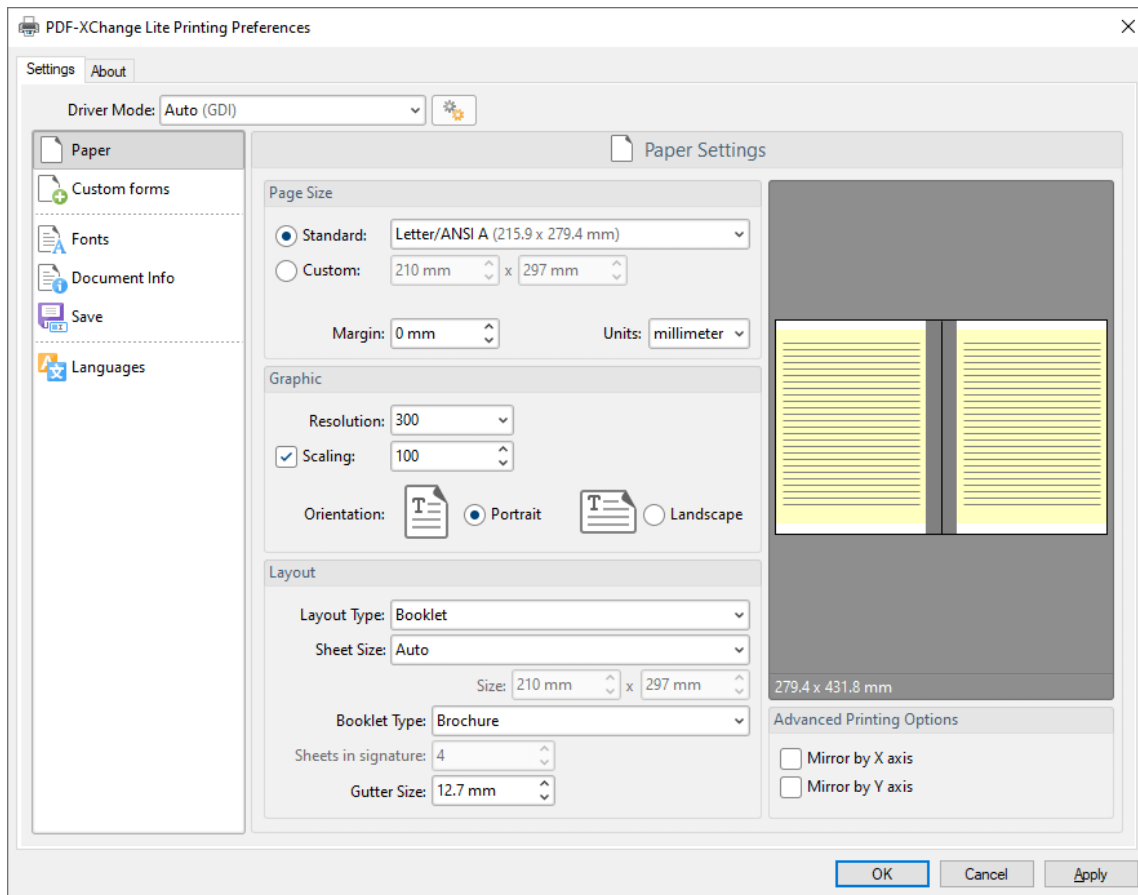
Figure 1. Paper Settings Dialog Box, Booklet Options

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.

- The remaining options are industry-standard dimensions.

The **Booklet Type** options determine the booklet format:

- **Brochure** creates brochures, which are usually two or four pages in length and fit on a single sheet.
- **Books** have more pages than brochures and usually feature double-sided printing.
- Use the **Sheets in signature** number box to determine how sheets are folded.
- Use the **Gutter size** number box to determine the binding margin area, which the gray area in the preview pane represents. The default size is the industry-standard 12.7mm

Click **OK** to save changes.

7.2.1.3   Multiple Pages per Sheet

Multiple Pages per Sheet

The **Multiple Pages per Sheet** layout is used to print multiple document pages per printed page. When it is selected in the **Layout Type** menu the following options are available:
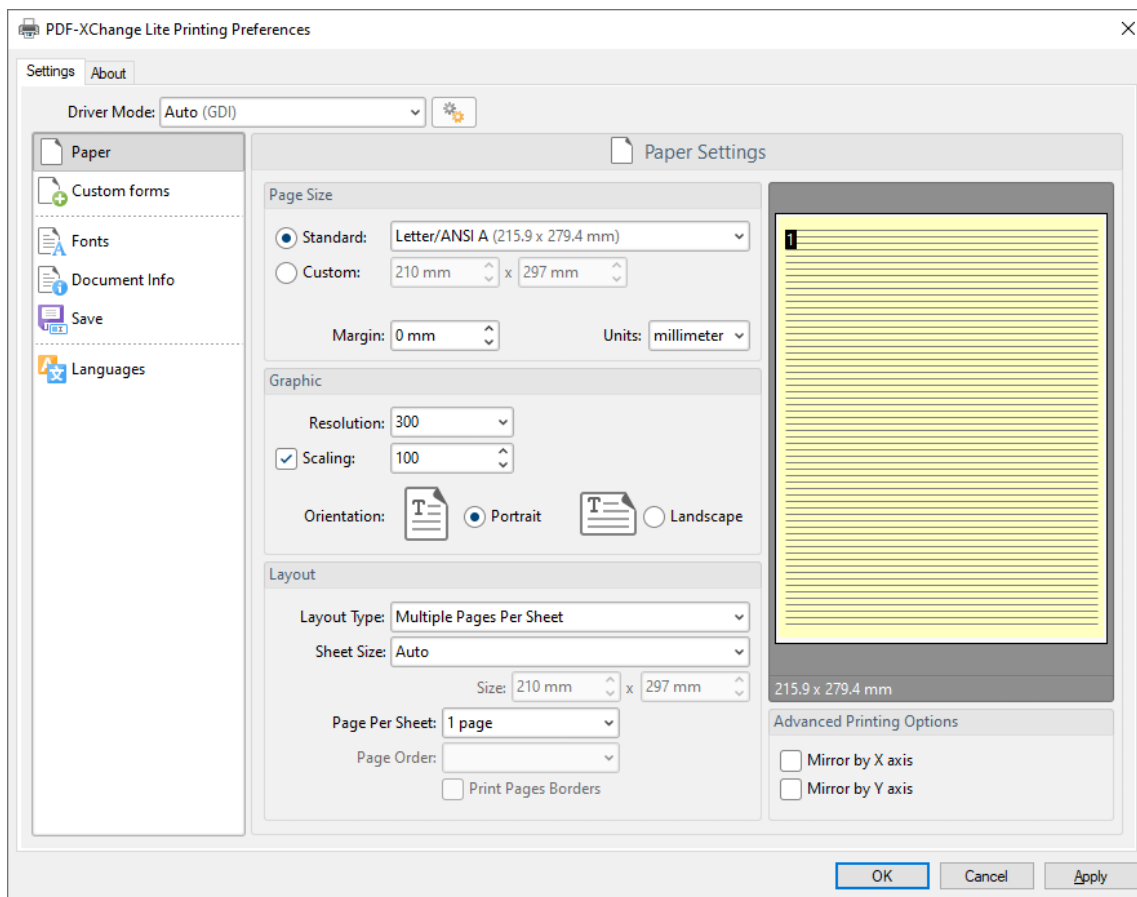
Figure 1. Paper Settings Dialog Box, Multiple Pages Per Sheet Options

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.

- The remaining options are industry-standard dimensions.

Page Options

- The **Page Per Sheet** dropdown menu determines how many pages feature on each sheet.
- The **Page Order** menu determines how pages are ordered in the PDF document. Select an option to view the layout in the preview pane.
- Select the **Print Pages Borders** box to print page borders.

Click **OK** to save changes.

7.2.2   **Custom Forms**

Custom Forms

The **Custom Forms** settings are used to save custom forms for subsequent use:
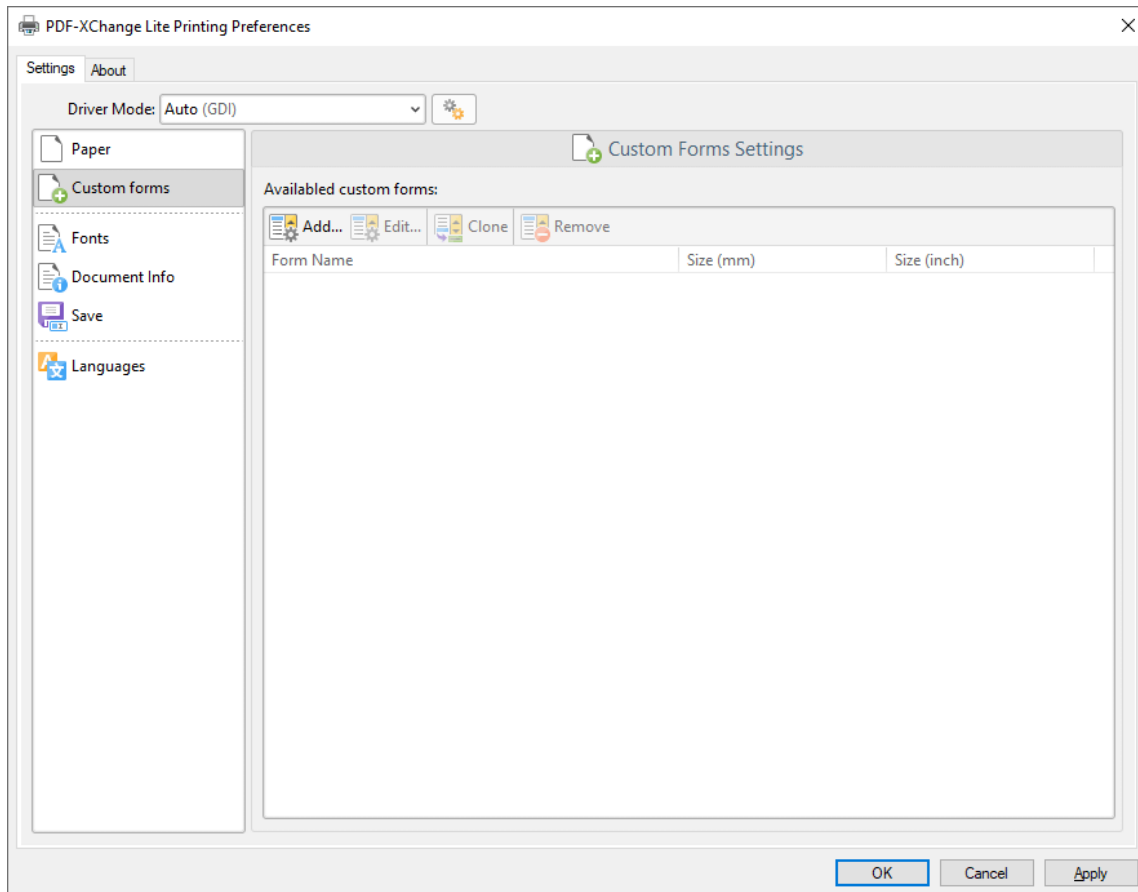
Figure 1. Custom Forms Dialog Box

- Click **Add** to add a new custom form. The **Add/Edit Custom Form** dialog box will open, as detailed below.
- Click **Edit** to edit selected forms.
- Click **Remove** to remove selected forms.
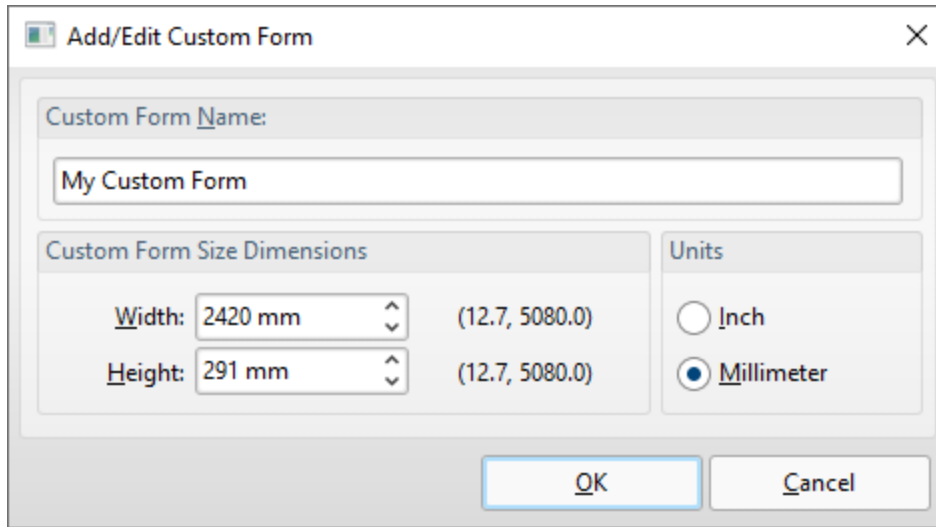
Figure 2. Add/Edit Custom Form Dialog Box

- Enter a name in the **Custom Form Name** text box to name the custom form.
- Enter dimensions in the **Width** and **Height** boxes and select a unit of measurement.

Click **OK** to save custom forms. They will then be detailed in the **Custom Forms** dialog box, and can also be selected in the **Sheet Size** dropdown menu in **Paper** settings:
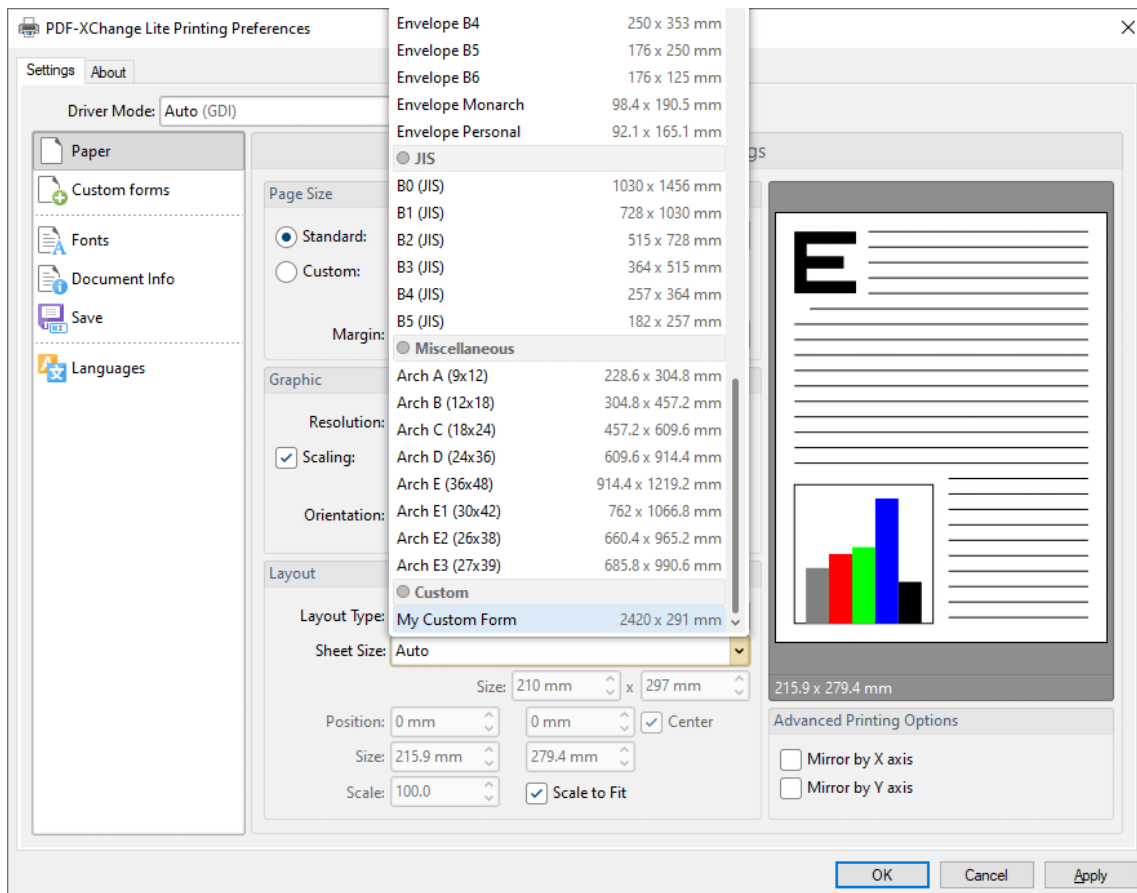
Figure 3. Paper Settings Dialog Box, Sheet Size Dropdown Menu, Custom Forms

7.2.3   **Fonts**

![PDF Lite Fonts icon] **Fonts**

The **Fonts** settings are used to determine font embedding options:
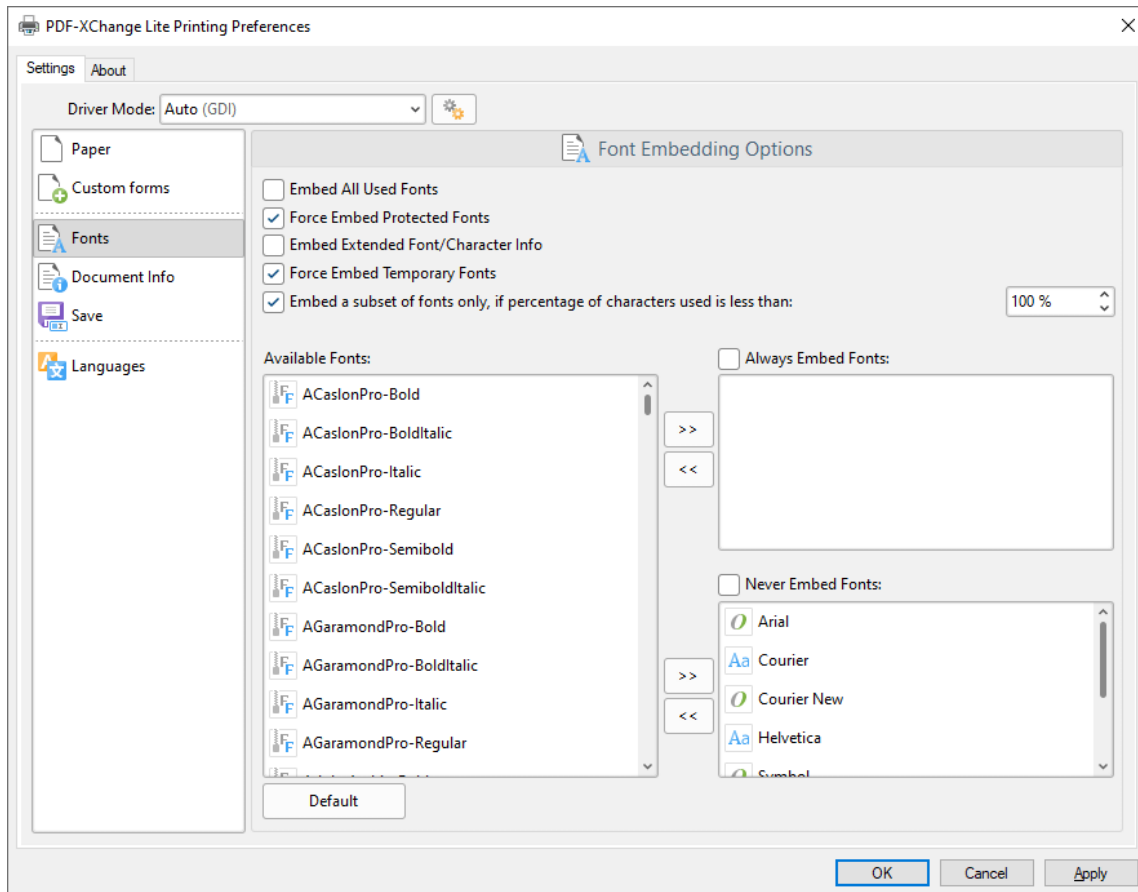
Figure 1. Font Embedding Options Dialog Box

- Select the **Embed All Used Fonts** box to embed all fonts. This increases the file size but ensures that fonts can be viewed on all machines.
- Select the **Force Embed Protected Fonts** box to force the inclusion of protected fonts in documents. Please note that some fonts are not licensed for widespread distribution and therefore it is necessary to check license permissions when this option is used.

- Select the **Embed Extended Font/Character Info** box to embed extended fonts and character information.
- Select the **Force Embed Temporary Fonts** box to force the inclusion of temporary fonts in documents.
- 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 total fonts they represent in files is less than the percentage entered into the adjacent number box. This optimizes the size of files as it saves a subset of fonts as opposed to the entire character set, but it should only be used when there is no intention to edit documents subsequently.
- The **Available Fonts** window displays all fonts available for embedding. Select fonts and then use the arrow icons to add them to the **Always Embed Fonts** or **Never Embed Fonts** panes. The best approach, in order to optimize file size, it to embed uncommon fonts and leave common fonts unembedded. This is because it is probable that common fonts will be available on the computers of subsequent users, and therefore embedding these fonts will increase the size of files unnecessarily.

Click **OK** to save settings.

7.2.4 **Document Info**

Document Info

The **Document Info** settings are used to determine document information:
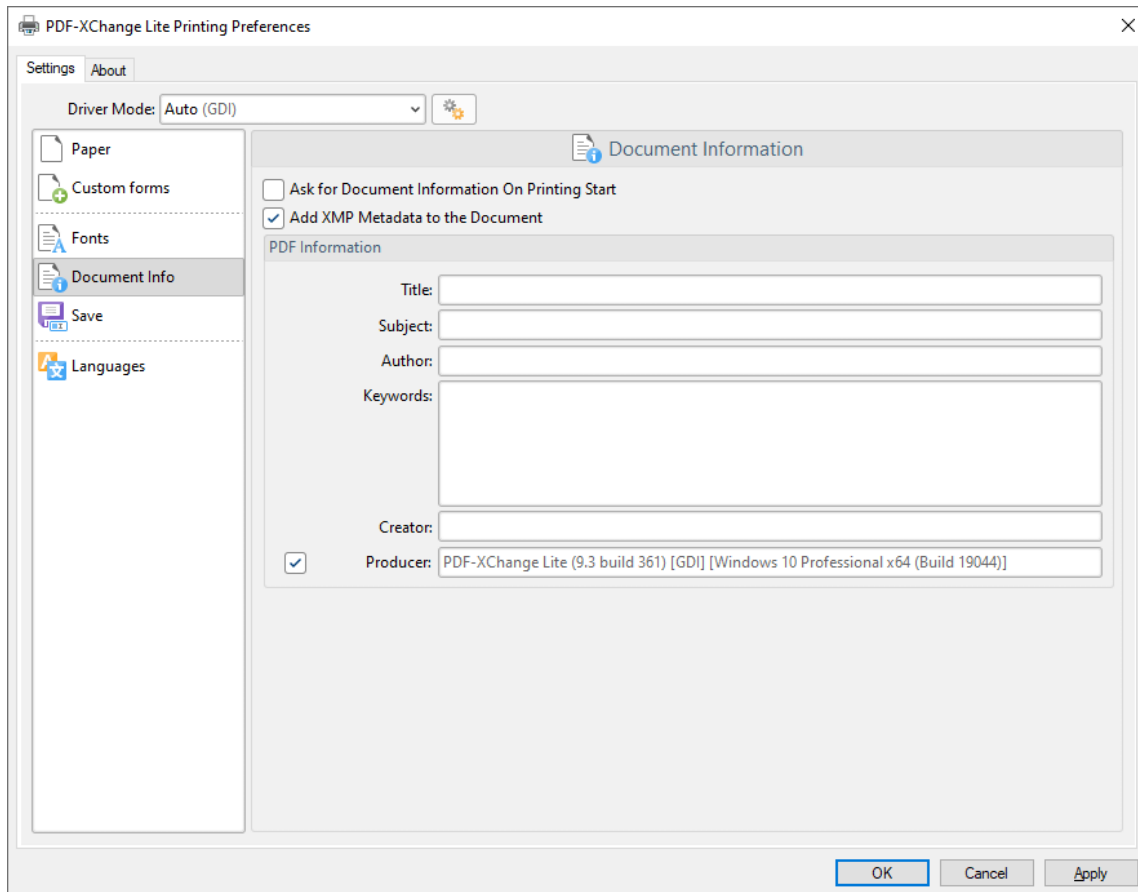
Figure 1. Document Information Dialog Box

- Select the **Ask For Document Information on Printing Start** box to enter document metadata when documents are printed.
- Select the **Add XMP Metadata to the Document** box to add the **(*XMP)** extension to documents. See **here** for further information.
- Enter data in the **PDF information** text boxes as desired.

- Select the **Producer** box to add the PDF producer to the information of the document, or clear this box to exclude the PDF producer information from the document.

Click **OK** to save settings.

7.2.5   **Save**

Save

The **Save** settings are used to determine how **PDF-XChange Printer Lite** names and saves files:
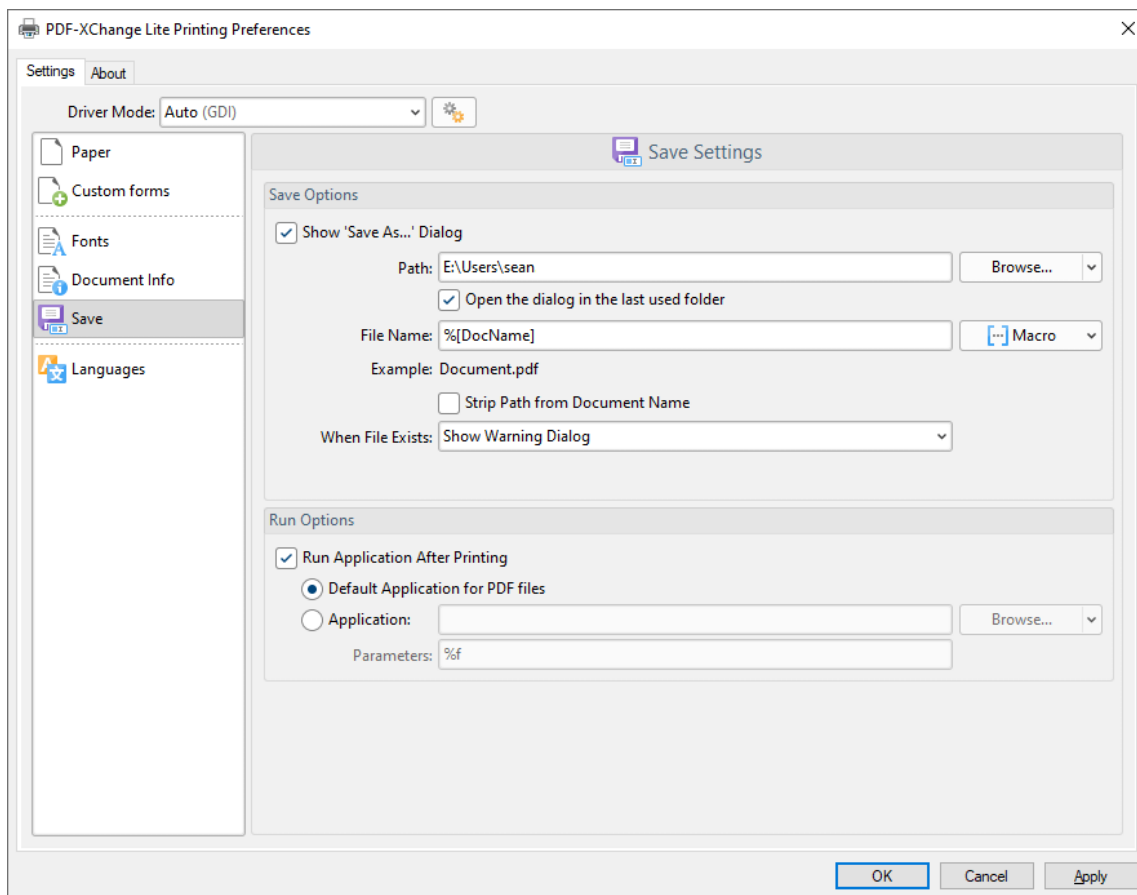
Figure 1. Save Settings Dialog Box

- Select the **Show Save As** box to view the **Save As** dialog box when files are saved. Use this option to update the filename when files are saved.
- Use the **Path** text box to determine the location of saved files. Click **Browse** to select a folder, or click the arrow to view/select common file locations such as **My Documents** or the desktop.

- Use the **File Name** text box to name files. Note that **macros** 〔1322〕 as can be used in this text box.
- Select the **Strip Path From Document Name** box as desired.
- The **When File Already Exists** dropdown menu determines the action taken when entered file names are already in use:
  - **Show Warning Dialog** displays a warning and prompts the user for action.
  - **Always Overwrite** uses the new file to overwrite the existing file.
  - **Auto Number** uses the same file name and appends a number.
  - **Merge with Existing (Append To)** appends the new file to the existing file.
  - **Merge with Existing (Insert Before)** inserts the new file before the existing file.
  - **Ask for new file name** prompts for a new file name.
- Select the **Run Application After Printing** box to view printed documents when printing is complete.
- Select the **Default Application for PDF files** option button to view printed documents in the default PDF viewer.
- Select the **Application** option button to view printed documents in an alternative application. Enter the name of the application in the text box, or click **Browse** to select an application manually.
- Enter application parameters in the **Parameters** text box as desired.

Click **OK** to save settings.

7.2.5.1 **Macros**

Macros

Macros can be used when saving files in **PDF-XChange Printer Lite.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule that specifies how input characters should be entered to create corresponding output. This means that components of the output process can be simplified during the input process, which makes the work involved less intensive and more dynamic. Use macros in the **Filename** when files are saved in **PDF-XChange Printer Lite** to create the names of saved files. Note that multiple macros can be used simultaneously as desired. Click the macro button to view the list of macros, then click macros to add them to the text box. Macros can also be entered manually.

Please note that certain symbols are not compatible with macros and therefore are not permitted in document names. If inconsistencies are noticed between the name used when files are saved and the final file name then it is advised to change the name used when files are saved.

The format for macros is:

%[<Macro Name>] or, when it is customizable: **%[<Macro Name>:<Parameter>]**. The **<Parameter>** step is optional in all cases except for the **Environment Variable** macro.

An example of the filename that entered macros will create is displayed beneath the **File Name** text box. For example, if the **%[Docpath]** macro is entered, then the example displays the source path of the printed document:
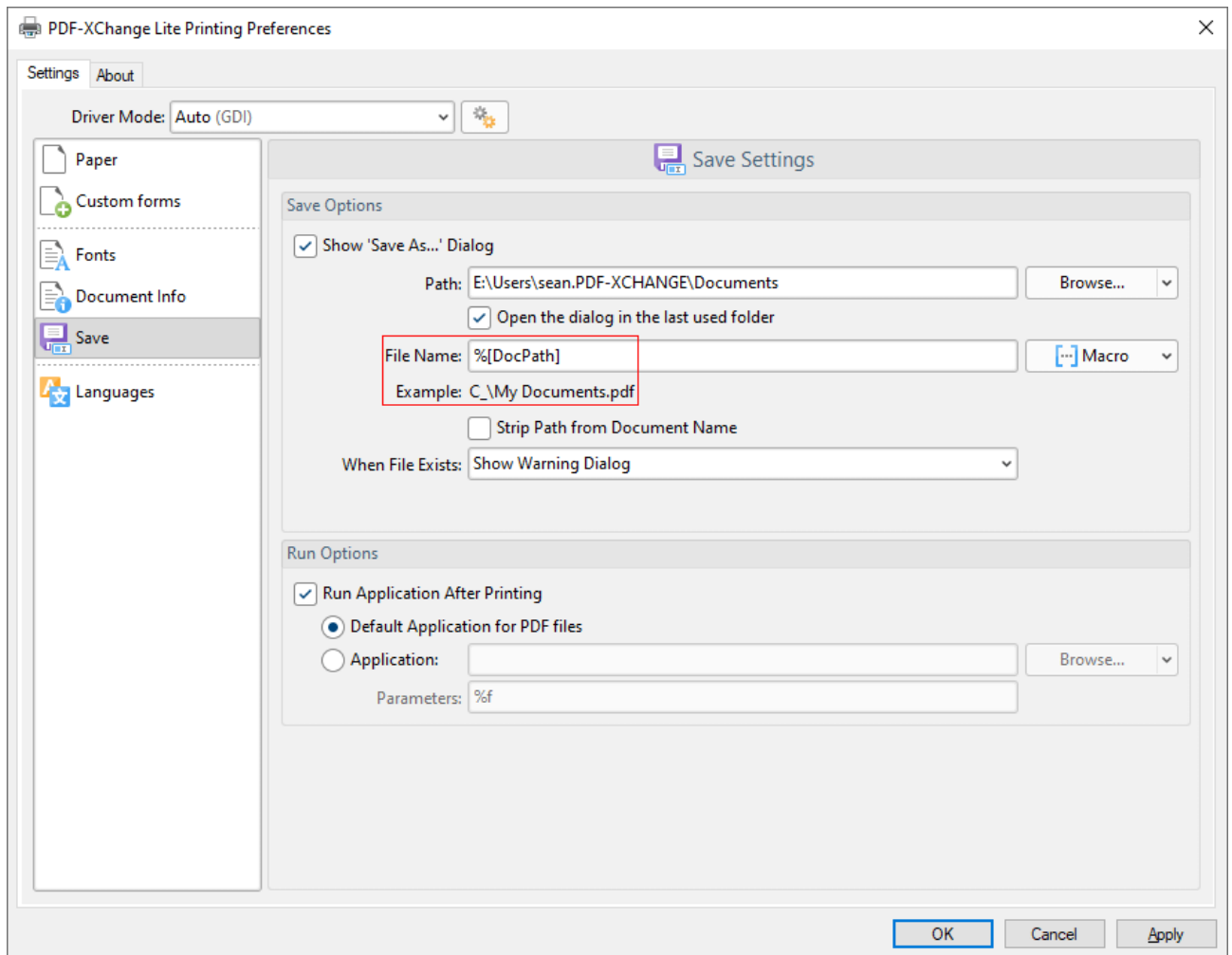
Figure 1. Example Macro

All available macros are detailed below:

- **Application Name,** which uses the syntax **%[AppName]** and adds the executable filename extension of the application that calls **PDF-XChange Printer Lite** to print the document. For example, if **Microsoft Word** is used then **'WINWORD'** is added.
- **Document Name,** which uses the syntax **%[DocName]** and adds the name of the document. Further information about this macro is detailed below.
- **Document Path,** which uses the syntax **%[DocPath]** and adds the path of the printed document.
- **Date,** which uses the syntax **%[Date]** and adds the current date. Multiple date formats are available, as detailed below. Please note that if parameters are not used in conjunction with this macro then the output will be different from what is expected. This is because the output from the default settings includes forwardslashes, which are not compatible with file names. **PDF-XChange Printer Standard,** the 'full' version of **PDF-XChange Printer Lite,** contains a range of features for the **%[Date]** macro. These features require the date in standard format,

which is the reason for the format of the default settings and why they do not create the expected output when saving files in **PDF-XChange Printer Lite.**

- **Year,** which uses the syntax **%[Year]** adds the current year as a four-digit value.
- **Month,** which uses the syntax **%[Month]** and adds the current month as a numerical value from 1-12.
- **Day,** which uses the syntax **%[Day]** and adds the current day of the month as a two-digit value.
- **Time,** which uses the syntax **%[Time]** and adds the current time. Multiple time formats are available, as detailed below.
- **Hour,** which uses the syntax **%[Hour]** and adds the hour value from the current time.
- **Minute,** which uses the syntax **%[Minute]** and adds the minute value from the current time.
- **Seconds,** which uses the syntax **%[Second]** and adds the seconds value from the current time.
- **Computer Name,** which uses the syntax **%[Computer]** and adds the name of the local computer as defined by the **Windows Computer Name.**
- **User Name,** which uses the syntax **%[User]** and adds the name of the current user.
- **Page Number,** which uses the syntax **%[Page]** and adds the page number of source pages.
- **Pages Count,** which uses the syntax **%[Pages]** and adds the number of document pages.
- **Environment Variable,** which uses the syntax **%[Env]** and adds information taken from user-specified environment variables. This macro must be qualified with a parameter in order to return information. Available parameters are detailed below.

%[DocName]

The **getDocumentName** function of the **titrules.js** JavaScript uses the document name at the time of printing to define this macro. This JavaScript is included to give **PDF-XChange Printer Lite** priority over other applications when documents are saved. This is a necessary process because of the complicated manner in which **Microsoft** defines document names. Please note that modifying the **titjules.js** JavaScript is a complicated process that only experienced JavaScript programmers should perform. If you require assistance then please **Contact Us.**

Available Parameters

%[Date]

- **d** inserts the day of the month and omits the zero in cases of single-digit values.
- **dd** inserts the day of the month and includes a zero in cases of single-digit values.
- **ddd** inserts the day of the week as a three-letter abbreviation.
- **dddd** inserts the day of the week.

- **M** inserts the month as a numerical value and omits the zero in cases of single-digit values.
- **MM** inserts the month as a numerical value and and includes a zero in cases of single-digit values.
- **MMM** inserts the month as a three-letter abbreviation.
- **MMMM** inserts the month.
- **yy** inserts the year as two digits and adds a zero in cases of values lower than 10.
- **yyyy** inserts the year.

Note that several parameters can be used in sequence in order to insert a customized date. For example, **%[Date:dddd, dd MMMM yyyy]** inserts the day of the week followed by the day of the month, the month name in full and the year as four digits:
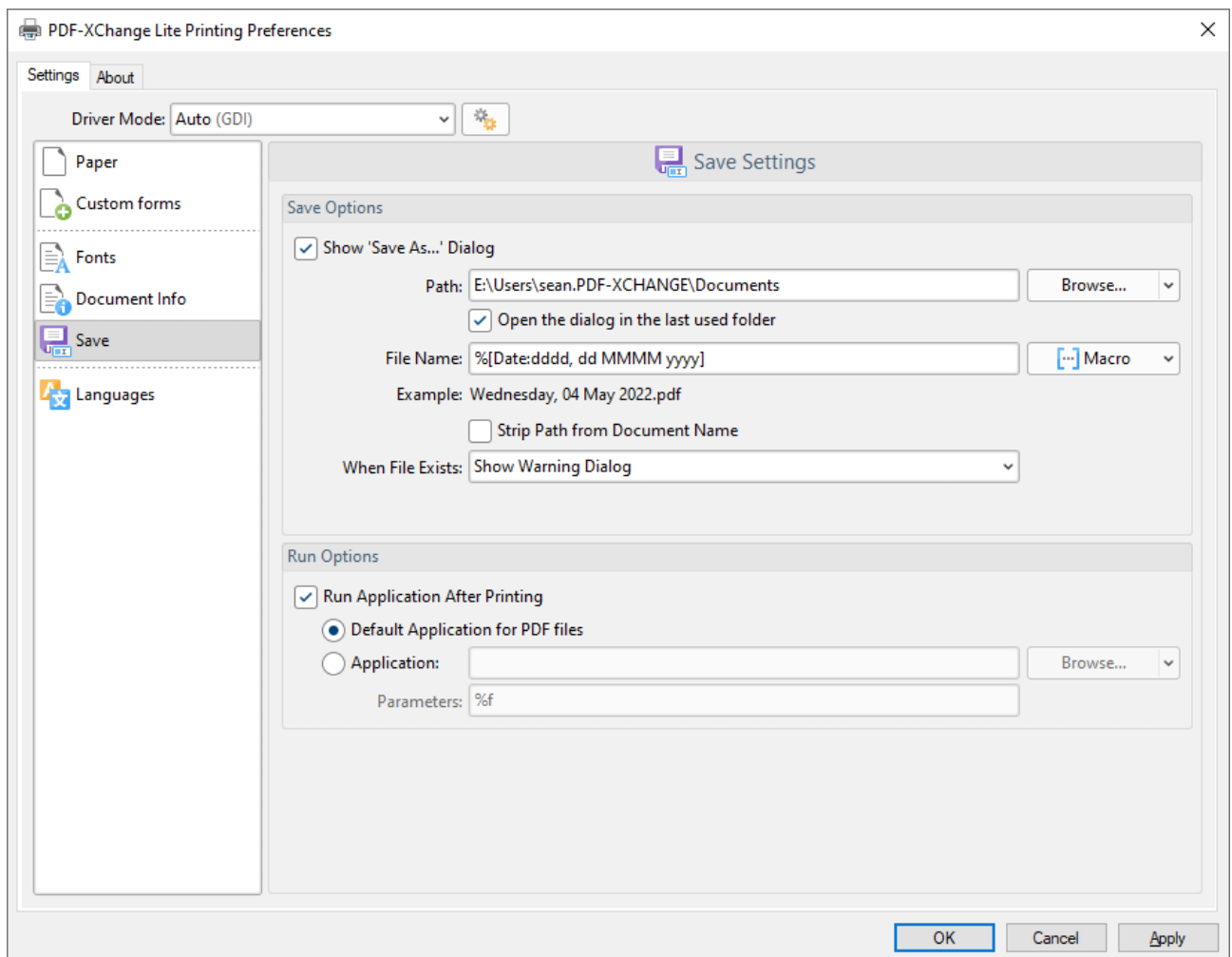
Figure 2. Example Date Macro

%[Time]

- **h** inserts the hour and omits the zero in cases of single-digit values.
- **hh** inserts the hour and includes a zero in cases of single-digit values.

- **H** inserts the hour, includes a zero in cases of single-digit values and uses a 24 hour-clock.
- **m** inserts the minutes and omits the zero in cases of single-digit values.
- **mm** inserts the minutes and includes a zero in cases of single-digit values.
- **s** inserts the seconds and omits the zero in cases of single-digit values.
- **ss** inserts the seconds and includes a zero in cases single-digit values.
- **t** inserts a single character to reference the a.m./p.m. variable: **A** or **P.**
- **tt** inserts two characters to reference the a.m/p.m. variable: **AM** or **PM.**

Note that several parameters can be used in sequence in order to insert a customized time, and a range of delimiter options can be used. For example, **%[Time:h-mm tt]** inserts the current hour and minutes followed by two characters to reference the a.m./p.m. variable:
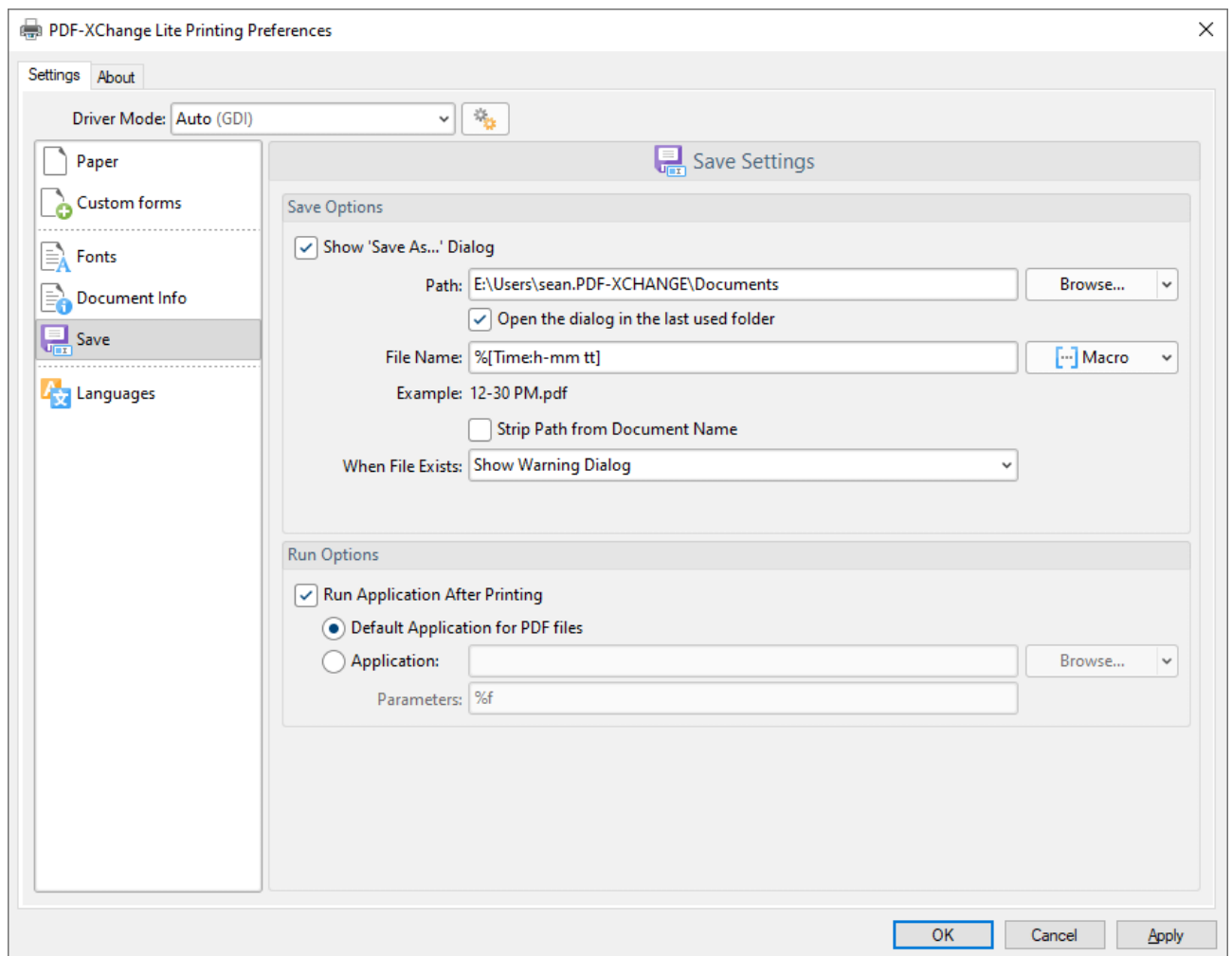
Figure 3. Example Time Macro

If parameters are not specified then output values revert to default, which is the time from the local computer in the format **hh_mm_ss AM/PM.pdf**

%[Env]

- **ALLUSERSPROFILE** inserts the full path to the *All Users* profile directory.
- **APPDATA** inserts the full path to the *Application Data* directory of the current user.
- **CommonProgramFiles** inserts the full path to the *Common Files* directory.
- **CommonProgramFiles(x86)** inserts the full path to the *(x86) Common Files* directory in 64-bit versions of **Windows.**
- **CommonProgramFilesW6432** inserts the full path to the *Common Files* directory in 64-bit versions of **Windows.**
- **COMPUTERNAME** inserts the computer name.
- **HOMEDRIVE** inserts the drive letter on the local computer that is connected to the user's home directory.
- **HOMEPATH** inserts the complete path of the current user's *Home* directory, as defined by the user's account properties.
- **LOCALAPPDATA** inserts the complete path to the current user's *Application Data* directory.
- **LOGONSERVER** inserts the name of the domain controller that authenticated the client's logon request.
- **OS** inserts the name of the operating system.
- **PROCESSOR_ARCHITECTURE** inserts the chip architecture of the CPU.
- **ProgramData** inserts the full path to the *All Users* profile directory.
- **ProgramFiles** inserts the full path to the *Program Files* directory.
- **ProgramFiles(x86)** inserts the full path to the *(x86) Program Files* directory in 64-bit versions of **Windows.**
- **ProgramFilesW643** inserts the full path to the *Program Files* directory in 64-bit versions of **Windows.**
- **PUBLIC** inserts the full path to the *Public* directory.
- **SESSIONNAME** inserts the session name and number when a client is connected via a terminal server.
- **SystemDrive** inserts the name of the drive on which the system folder was placed.
- **SystemRoot** inserts the name of the system folder.
- **TEMP** inserts the name of the default temporary folder used by the operating system and applications available to the current user.
- **TMP** inserts the name of the default temporary folder used by the operating system and applications available to the current user. (Note that some applications require the **TEMP** environment variable, whilst others require **TMP.** The values for both should be identical).
- **USERDOMAIN** inserts the name of the user domain that contains the account of the current user.
- **USERDOMAIN_ROAMINGPROFILE** inserts the name of the user domain for RDS or standard roaming profile paths.
- **USERNAME** inserts the name of the current user.
- **USERPROFILE** inserts the location of the current user's profile directory.
- **windir** inserts the full path to the *Windows* directory.

For example, the macro **%[Env:CommonProgramFiles]** inserts the full path to the *Common Files* directory:
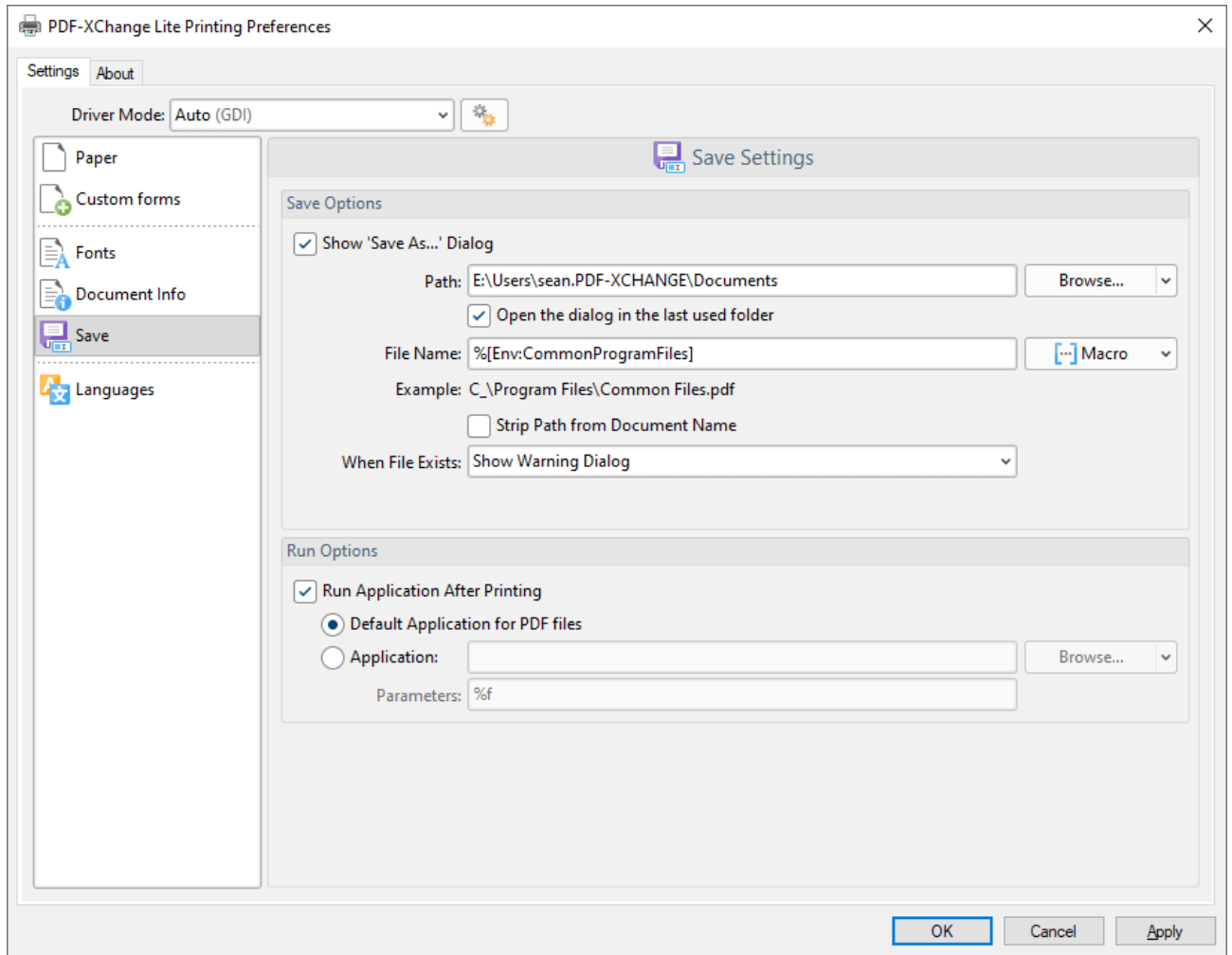
Figure 4. Example %[Env:CommonProgramFiles] Macro

7.2.6 **Languages**

Languages

The **Languages** settings are used to determine the language of the user interface:
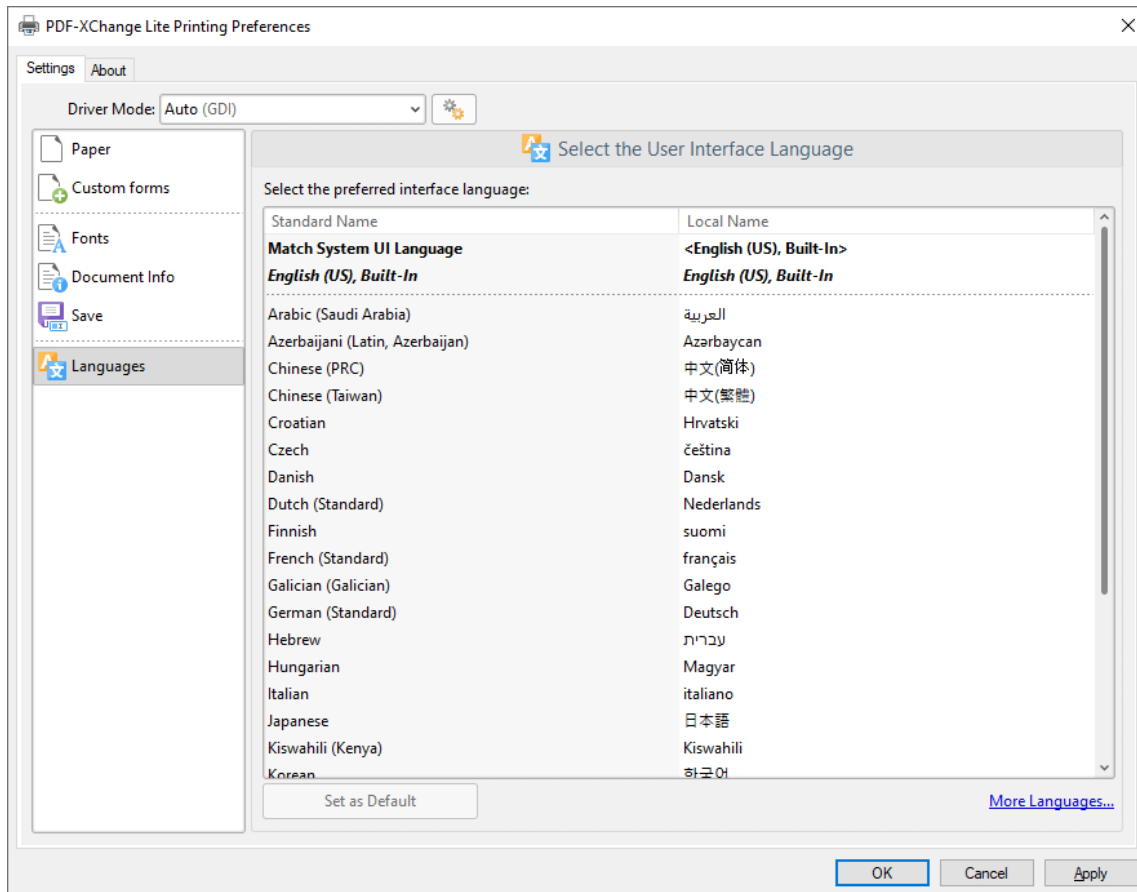
Figure 1. Choose Interface Language Dialog Box

Click **Use Regional Settings** to use the regional language of the local computer. Alternatively, click to select a language from the list of languages, then click **Set as Default** to enable it.

Click **OK** to save settings.

7.2.7 **Driver Mode**

Driver Mode

The **Driver Mode** determines the print mode of **PDF-XChange Printer Lite:**
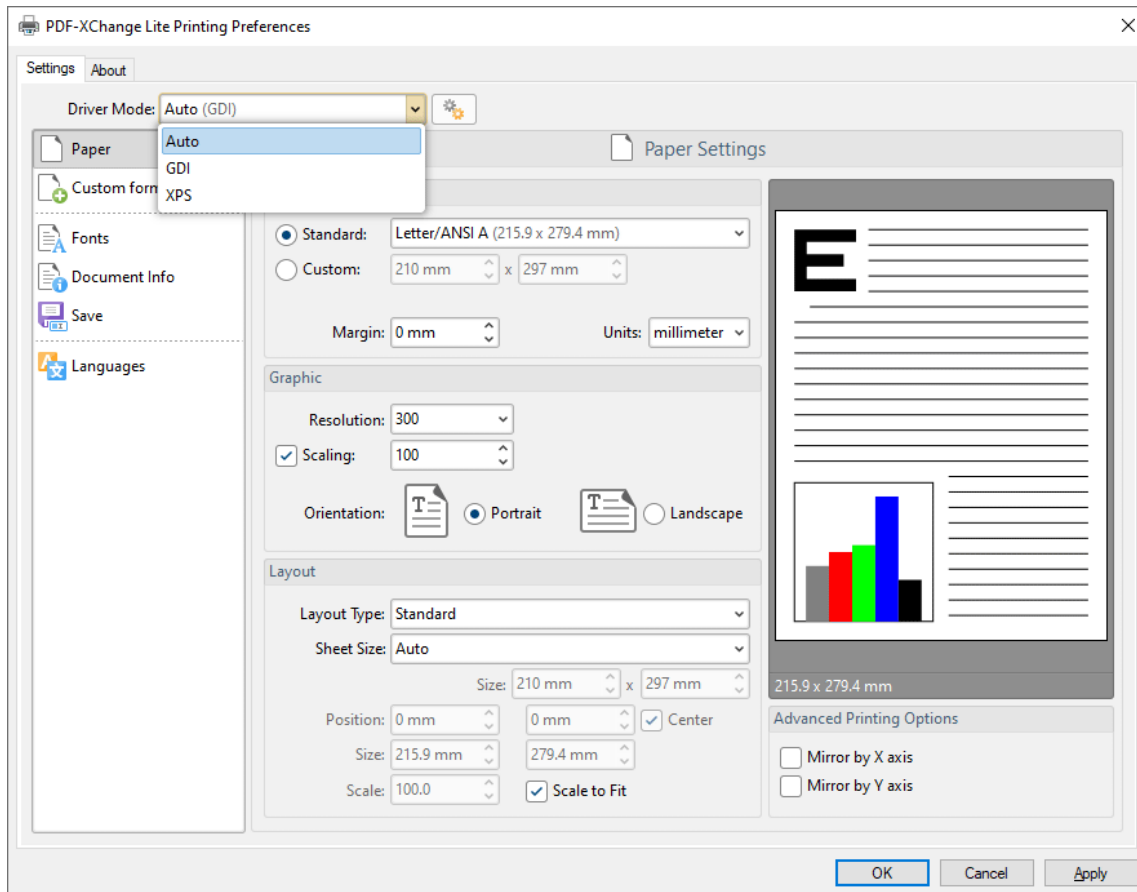
Figure 1. Driver Mode Options

Printer drivers on **Microsoft Windows** systems make use of **GDI (Unidrv** or **P-Script-based)** or **XPS (XPSDrv)** in order to print documents. **PDF-XChange Printer Lite** supports both of these modes, and the **Driver Mode** settings determine which mode is used:

- **Auto** allows **PDF-XChange Printer Lite** to determine the print mode.
- **GDI** specifies **GDI** printing to **GDI.**

- **XPS** specifies **XPS** printing to **XPS.**

Driver Mode Rules

The driver mode rules are used to set printing to **GDI** or **XPS** for specific applications. Click the icon next to the **Driver Mode** dropdown menu in order to specify driver mode rules:
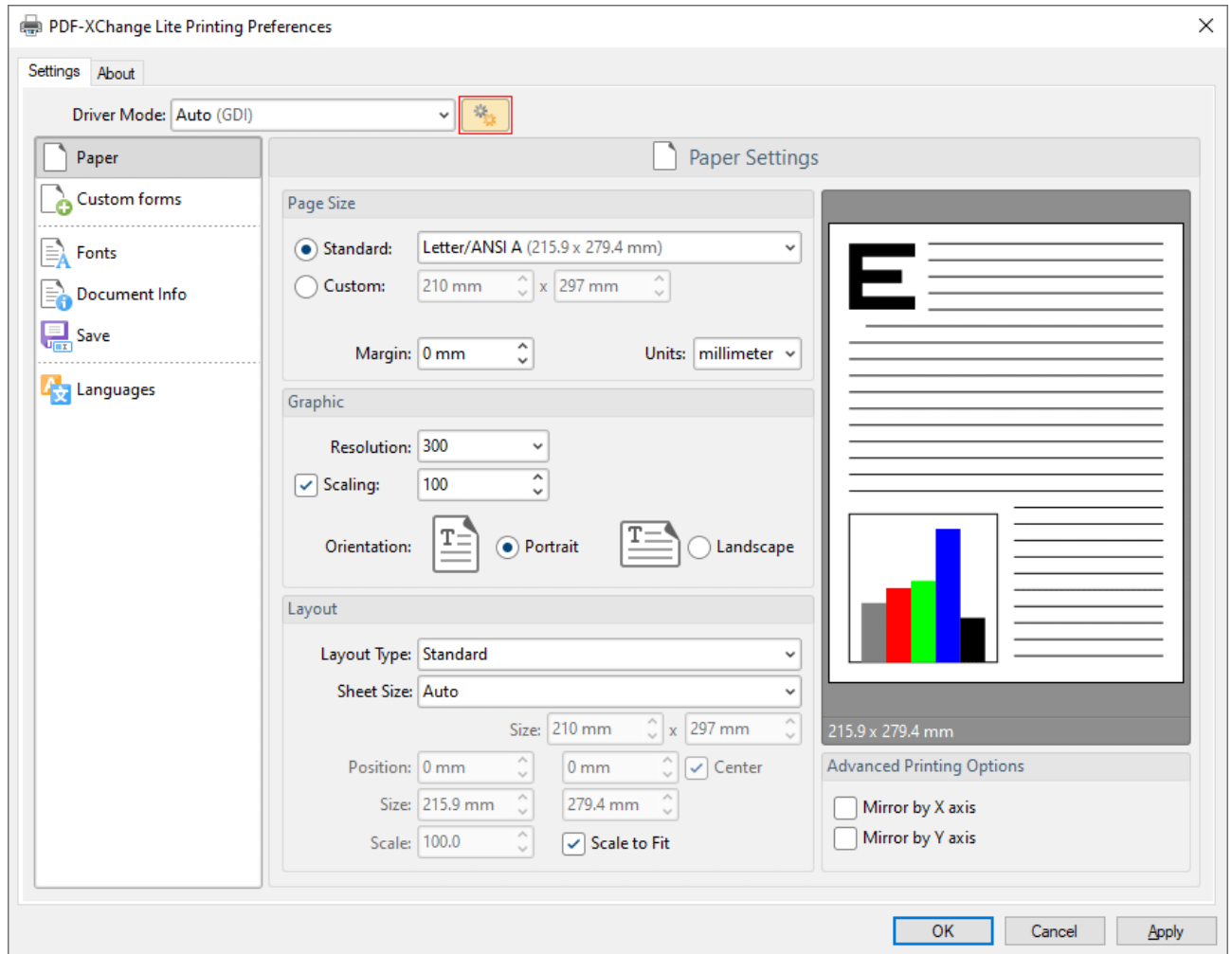
Figure 2. Driver Mode Rules Icon

The **Driver Mode Rules** dialog box will open:
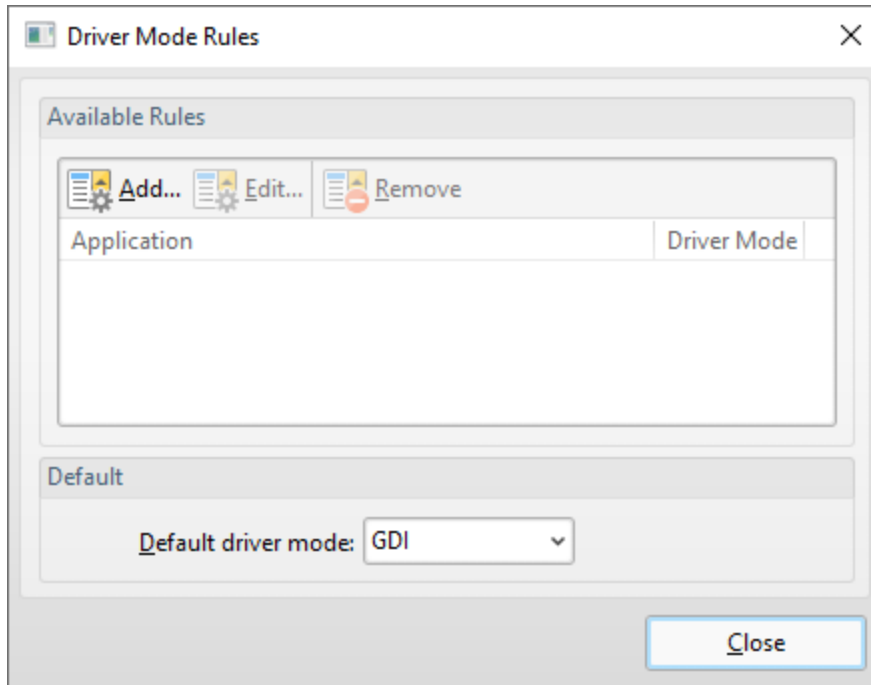
Figure 3. Driver Mode Rules Dialog Box

- Click **Add** to add applications to the list. The **Add/Edit Driver Mode** dialog box will open, as detailed below.
- Click **Edit/Remove** to edit/remove selected applications. The **Add/Edit Driver Mode** dialog box will open, as detailed below.
- Use the **Default driver mode** dropdown menu to determine the default driver mode in **PDF-XChange Printer Lite.**
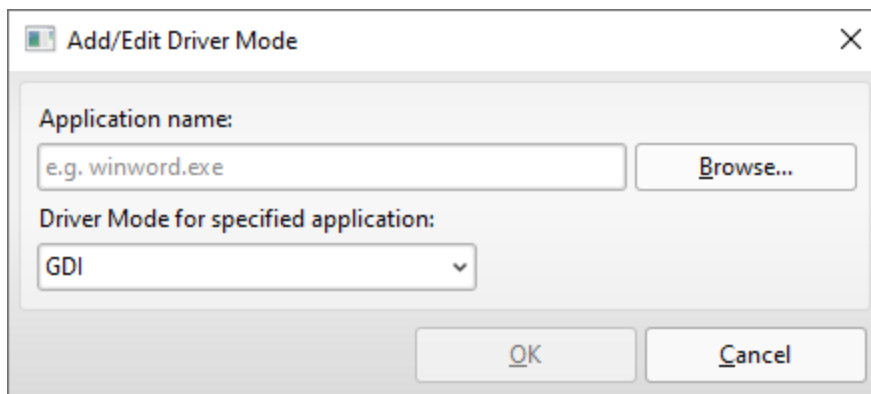
Figure 4. Add/Edit Driver Mode Dialog Box

- Enter the name of the application in the **Application name** text box. Note that the executable file of the application must be used. Alternatively, click **Browse** to select an application manually.
- Use the dropdown menu to determine the **Driver Mode** for the specified application. **PDF-XChange Printer Lite** will then print in the specified mode when this application is used.

Click **OK** to save changes.

7.2.8   **PDF Saver**

PDF Saver

The **PDF Saver** feature facilitates the combination of multiple print jobs into a single PDF document. This increases the speed at which files are generated, which allows users to queue new jobs before the final file assembly and generation.

Enter **'pdfsaver'** in the **Windows** search box and click **PDF-XChange Printer Lite pdfSaver** to view/edit the **PDF Saver** settings:
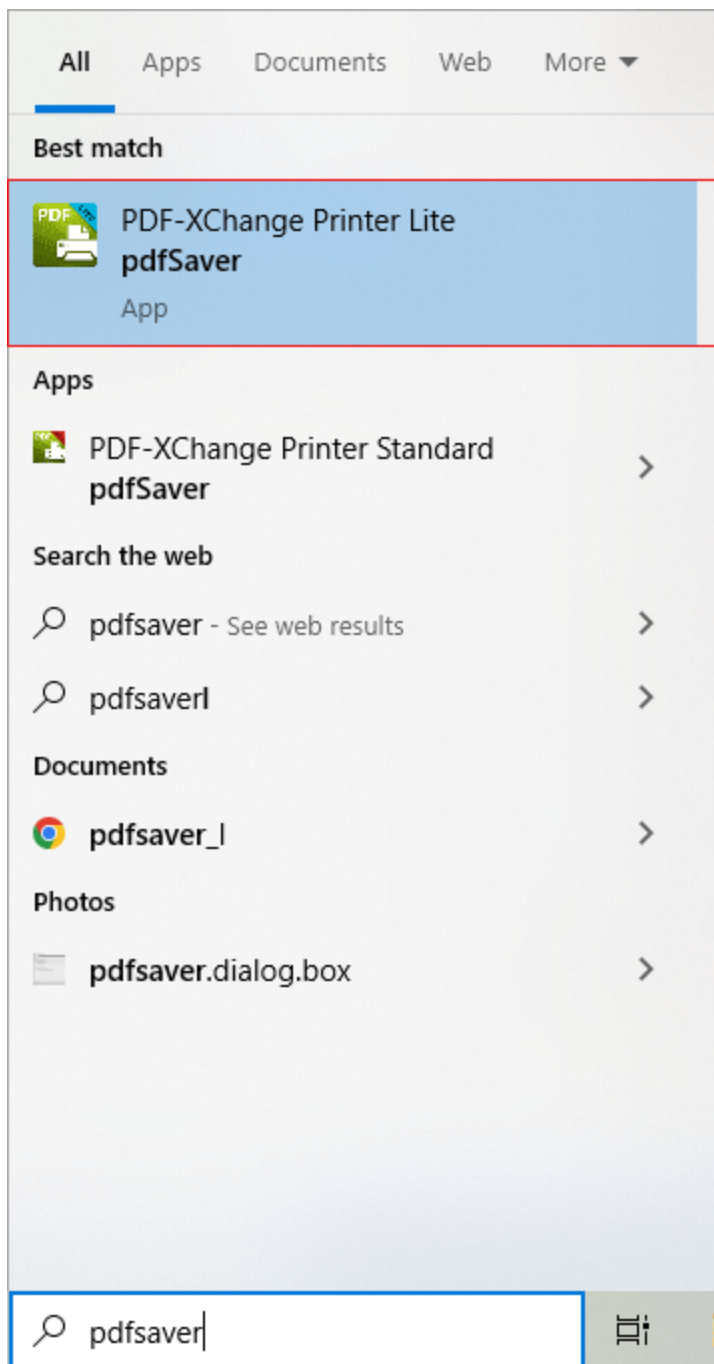
Figure 1. Windows Search Box Results

The **PDF-XChange Lite: pdfSaver** dialog box will open:
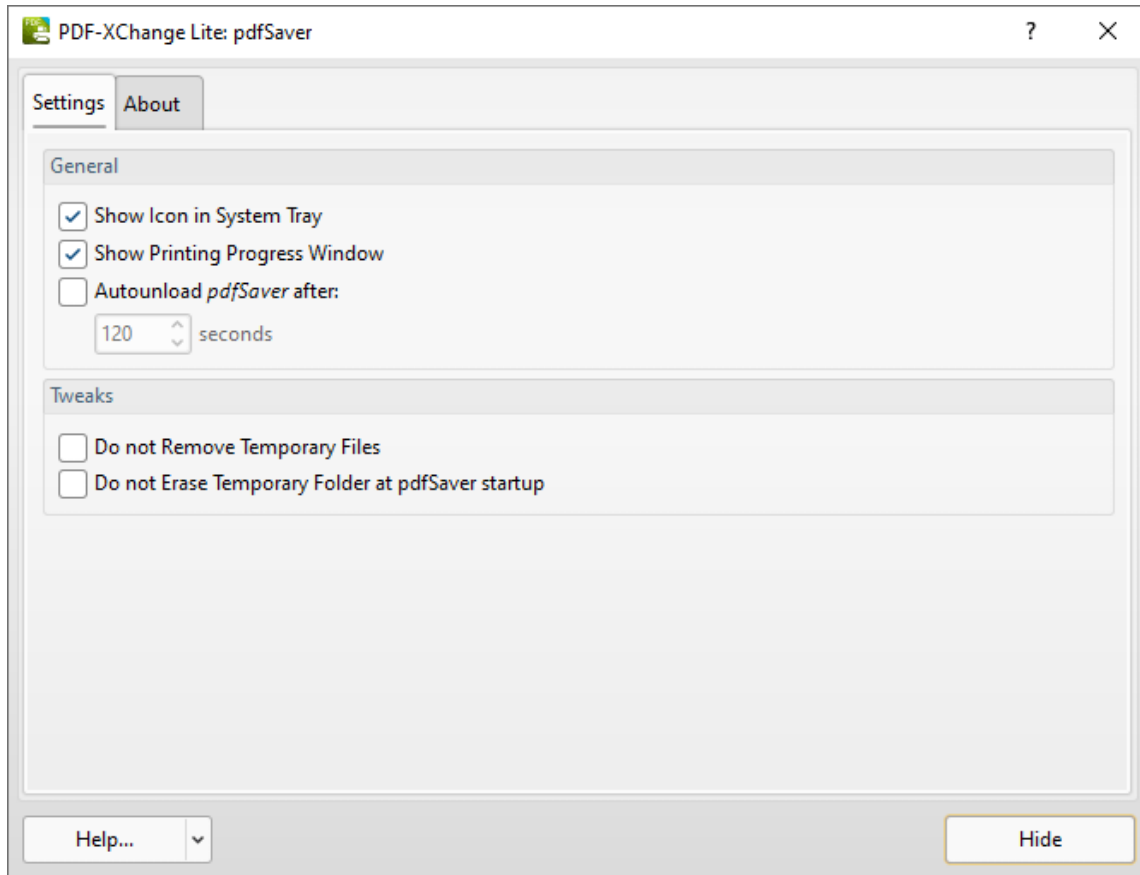
Figure 2. PDF-XChange Lite: pdfSaver Dialog Box

- 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.
- Select the **Autounload pdfSaver after** box to unload **PDF Saver** when printing is complete. Use the number box to determine the period after which **PDF Saver** closes.
- Select the **Do not Remove Temporary Files** box to retain temporary files after documents are printed.
- Select the **Do not Erase Temporary Folder at pdfSaver startup** box to retain the temporary folder when **PDF Saver** is launched.
- Use the **Help** dropdown menu to navigate to the **PDF-XChange Printer Lite** online manual, the **PDF-XChange Printer Lite** product page on the **PDF-XChange** website or the **Support Forums** as desired.
- Click **Hide** to minimize the window.
- Click the **About** tab to view build and version information about **PDF-XChange Printer Lite.**