PDF-XCHANGE

PDF-XChange Editor V6 USER MANUAL

https://www.pdf-xchange.com

sales@pdf-xchange.com

support@pdf-xchange.com

Head Office:

Tracker Software Products (Canada) Ltd.
P.O. Box 79
9622 Chemainus Road
Chemainus, British Columbia
V0R 1K0
Canada

Sales
Tel: Canada (+00) 1-250-324-1621
Fax: Canada (+00) 1-250-324-1623

In Europe:

PDF-XChange Co. Ltd
Horsmanshoad, Pickwell Lane,
Bolney, West Sussex
RH17 5RH
United Kingdom

Sales
Tel: +44 (0)20 8503 8711
Fax: (+00) 1-250-324-1623

1   Welcome

PDF-XChange Editor V6

Welcome to **PDF-XChange Editor V6** - one of the fastest and most feature-rich options available worldwide to create, view, edit and annotate PDF files.

PDF-XChange Lite V6, our award-winning technology that installs as a virtual printer, is included with this product. It can be used to print-to-PDF from all Windows applications. See **here** ⌐873⌐ for the **PDF-XChange Lite V6** user manual.

We offer several further cutting-edge applications for the manipulation of PDF and image files. See the **PDF-XChange Products Page** for more information.

If you have any queries then please **Contact Us.** We aim to respond to all communication within eight hours - and we are usually much faster. Additionally, the **User Forums** are an excellent resource for troubleshooting.

This manual is composed of the following sections:

- **Installation** details the installation process, system requirements, installation switch options and licensing details for the software.
- **Features Overview** details the main features of **PDF-XChange Editor.**
- **Explore the User Interface** details the software as it appears via the user interface.
- **Operations Guide** details the operations that **PDF-XChange Editor** performs, and is composed of the following subsections:
  - The **Annotations Guide** details all operations that relate to annotations, such as how to add annotations and comments to documents, attach files and set comment styles.
  - The **Bookmarks Guide** details all operations that relate to the creation and manipulation of document bookmarks.
  - The **Document Operations Guide** details all operations that relate to the creation and manipulation of PDF documents.
  - The **Editing Panes Guide** details all operations that relate to the usage of the nine editing panes featured in **PDF-XChange Editor.**

- The **Forms Guide** details all operations that relate to the creation and manipulation of fillable forms in PDF documents.
- The **Workspace Guide** details all operations that relate to the customization and navigation of the **PDF-XChange Editor** workspace.
- **Tabs Guide** is structured to match the UI of the software and details comprehensive operational instructions for its features and functionality. The tabs in **Menu Toolbar** each have a corresponding section in the manual, where their submenu options and associated settings are explained:
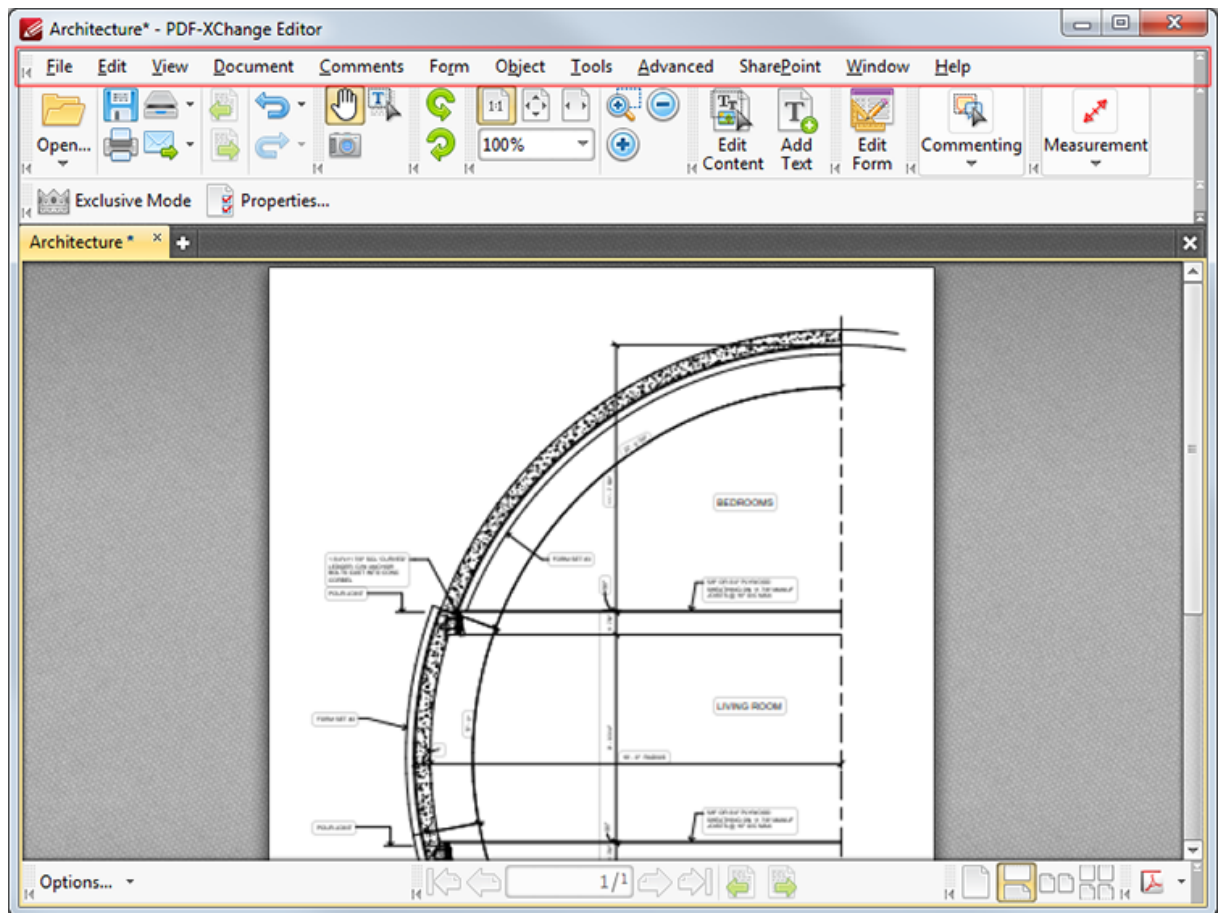
Figure 1. Menu Toolbar

- **Appendix** details additional information that relates to the software.
- **PDF-XChange Lite User Manual** is a comprehensive guide to **PDF-XChange Lite,** the virtual printer that is included with this product.

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

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.

2 Installation

Installation

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

>1. Use the link in your purchase confirmation email or click **here** to download the evaluation version of **PDF-XChange Editor.**

>2. When the download is complete, click the **PDFXVE6.zip** file to open the containing folder. (**Winzip** and **CnetsDownload.com** have free downloads available if you require software to unzip files).

>3. **PDFXVE6.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.

When an evaluation copy of **PDF-XChange Editor** is being used all output is generated with two watermark stamps on each page. When a full version has been purchased the serial number provided must be entered to ensure that all future output is free of the evaluation watermarks. Follow the steps below to register:

    1. Install the software using the steps outlined above.

    2. Click the desktop icon to launch the software.

    3. Click the **Edit** in the **Menu Bar**.

    4. Click **Preferences**.

    5. Click **Registration** in the **Categories** menu.

    6. Click **Add New Serial Key** in the registration window

    7. Enter the serial key into the text box, or copy and paste it from your clipboard.

    8. Click **Continue**.

If you have already installed the evaluation version of **PDF-XChange Editor** then there is no need to install it again. Simply follow the steps outlined above to register.

VERY IMPORTANT

The serial key/activation code is unique to you/your company. **PDF-XChange** uses an **FTP Automatic Update** to ensure that the latest version is always available to our clients. If you have purchased a single copy of the software it will allow only one user to update their copy. Similarly, if you have purchased a multipack license, then an equal amount of users will be able to update their software. Please keep your serial key/activation code safe. Do not share it with other parties, as doing so constitutes an illegal breach of copyright. If we discover evidence of abuse then updates will be disabled for your account. Serial keys/activation codes found on websites offering free and illegal software distribution will be disabled immediately. We monitor such websites on a daily basis. Help us safeguard the integrity of our products to ensure that their future development is made possible. Theft of our software deprives us of investment that improves our products for the benefit of all clients.

2.1   System Requirements

 System Requirements

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

Figure 1. Supported Operating Systems

Please note the following:

- We recommended 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 available options for msiexec are detailed in below. Please note that parameters are case sensitive.

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 recrods.

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.

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

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.

Syntax

<list of features>

Features

- **F_Viewer** – **PDF-XChange Editor** and its components.
- **F_Plugins** – The plugins module for the Editor. (This requires **F_Viewer**). If **F_Plugins** is specified, the following features can be used to install plugins:
- **F_Plugin_SP** – the SpellChecker plugin. (This requires **F_Plugins**).
- **F_FileOpenPlugin** – the plugin that provides support for files secured using "FileOpen". (This requires **F_Plugins**).
- **F_ReadOutLoudPlugin** – the plugin that provides read-out-loud functionality. (This requires **F_Plugins**).
- **F_OCRPlugin** – the plugin that allows the OCR of image-based PDF files in the software. (This requires **F_Plugins**).
- **F_OptimizerPlugin** – the plugin that optimizes PDF files to reduce their size. (This requires **F_Plugins**).
- **F_BookmarksPlugin** – the plugin that adds advanced features for editing 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 directly within the software. (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_MD Plugin** – the plugin that enables the conversion of Markdown files into PDF documents. (This requires **F_Plugins**).
- **F_BrowserPlugins** – the plug-ins for web browsers (Internet Explorer, FireFox, Opera, Safari, and Chrome) that allow the viewing of PDF files inside these browsers. (This requires **F_Viewer,** as well as **F_IEPlugin** and/or **F_NPPlugin**).
- **F_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_VLangs** – the language localization files for the software (requires **F_Viewer**).
- **F_Lite** – the **PDF-XChange Lite V6** printer and its components.

- **F_Langs_Lite** – the files that allow the language localization of the **PDF-XChange Lite V6** 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.** The updater checks automatically for updates to the software.
- **F_KeyInstaller** – the key installer for **PDF-XChange Software** applications.

A comprehensive list of available standard properties is available **here.**

Product Specific Properties

INSTALLLOCATION

This property specifies the 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.

PNAME

This property specifies the printer name. The default value is "PDF-XChange Lite V6."

Syntax

<name>

SET_LITE_AS_DEFAULT

If this property is unspecified, or specified with a value of "1", then the **PDF-XChange Lite V6** printer will be set as the default system printer.

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.

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.

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.

USERNAME

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

ORGANIZATION

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

Syntax

<oname>

USERMAIL

This property specifies the user email.

Syntax

<email>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault.

Syntax

<xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

<regkey>

DDEFLANGID

This property specifies a language for the print driver. (This requires the standard property **F_Langs_Lite** in order to operate). The **<id>** for target languages is available **here.** The "culture code" must be used for this property. This is a hexadecimal value and must be converted to decimal for use. For example German has the hexadecimal value 0x0407 and therefore the decimal 1031 must be used. A hexadecimal to decimal converter is available **here.**

Syntax

<id>

EDITOR_LANGUAGE

This property specifies a language for the software. (This requires the standard property **F_Vlangs** in order to operate). This property uses the "language culture name" to define languages. For example German is "**de-DE**". The **<id>** for target languages is available **here.**

Syntax

<id>

NOUPDATER

If this property is unspecified, or specified with a value of "0", then the updater will be installed. If specified with a value of "1" then the updater will not be installed. (Available from build 310).

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.

MSI Installer Examples

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

  ```
  msiexec /i EditorV6.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 EditorV6.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 EditorV6.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 EditorV6.x64.msi /qb EDITOR_LANGUAGE=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 EditorV6.x64.msi /qb
ADDLOCAL="F_Viewer,F_Plugins,F_Plugin_SP,F_OCRPlugin,F_VLangs,F_BrowserPlug
ins,F_IEPlugin" EDITOR_LANGUAGE=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 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 functionality to understand computer specifications and makes the best possible choice. A second option is to use the 32 bit MSI installer, as it functions correctly in both 32 or 64 bit systems. However, it does not take full advantage of hardware capabilities and fewer Shell Extension features are available.

The command line for installation is: **PDFXVE6.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

The EXE Installation Switches detailed below are available with **PDF-XChange Editor.** Please note that parameters are case sensitive.

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>

ORGANIZATION

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

Syntax

<oname>

USERMAIL

This property specifies the user email.

Syntax

<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.

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.

EDITOR_LANGUAGE

This property specifies a language for **PDF-XChange Editor**.

Syntax

<id>

This property uses the "language culture name" to define languages. For example German is **"de-DE".** The **<id>** for target languages is available **here.**

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.

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.

KEYDATA

This property specifies a registration key.

Syntax

<regkey>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault. See **here** ⌐33¬ for further information.

Syntax

<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).

EXE Installer Examples

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

      `PDFXVE6.exe /quiet`

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

```
PDFXVE6.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYFILE="C:
\license\V6Pro.xcvault"
```

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

```
PDFXVE6.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYDATA="PVP60
- ZJ2J77DN5kdBuQRhj ... dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
```

2.4   Licensing

Licensing

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

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

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

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

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

Figure 1. XCVault File Access Point

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

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

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

Standard Deployment

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

Silent Deployment

XCVault files can also be used for silent deployment of serial keys after installation has taken place. A windows command line can be used to push the XCVault file to each user that qualifies for a full license. 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

/s

Installs the software in silent mode.

/m

Per machine - administrative rights are required for this option.

/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 license keys from **.xcvault** files.

Syntax

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

/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"
```

/OpenKeys

This command removes protection for all installed, protected license keys on the machine and converts them into unencrypted, readable text. Additionally, this command places a permanent flag in the system registry that forces all products from **PDF-XChange** to add new license keys without the standard encryption.

Please note: the software encrypts new keys by default for security reasons. Encrypted keys cannot be exported from the registry and used on other machines. Therefore this command is available only in special cases and may require administrative rights.

Syntax

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

/M – keys stored in **HKEY_LOCAL_MACHINE** registry section only will be converted. If this option is not specified then all keys in **HKEY_CURRENT_USER** and **HKEY_LOCAL_MACHINE** will be converted. If this option is not specified and the utility has no administrative rights then only the keys in **HKEY_CURRENT_USER** will be processed.

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

Example

```
xcvault.exe /OpenKeys
```

/ProtectKeys

This command encrypts all installed license keys on the machine. Please note that administrator rights may be required to use this command.

Syntax

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

/M – keys stored in **HKEY_LOCAL_MACHINE** registry section only will be converted. If this option is not specified then all keys in **HKEY_CURRENT_USER** and **HKEY_LOCAL_MACHINE** will be converted. If this option is not specified and the utility has no administrative rights then only the keys in **HKEY_CURRENT_USER** will be processed.

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

Example

```
xcvault.exe /ProtectKeys
```

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="PXP50-Y5EN....cFrBqnyKhv6eOw=".

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 is detailed **here.** 24

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3   Features Overview

![PDF-XChange Editor logo] **Features Overview**

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

Create and Manipulate Documents

- Create PDF documents from image files, markdown files, text files, RTF files or the local scanner. See **here** [67] for further information.
- Print documents. See **here** [198] for further information.
- Email documents. See **here** [190] for further information.
- Combine multiple input documents into a single file. See **here** [165] for further information.
- Convert documents to/from PDF and a range of other formats.
- Secure documents. See **here** [206] for further information.
- Use **Digital Signatures** to sign documents and demonstrate authenticity. See **here** [597] for further information.
- Integrate **Sharepoint, Dropbox, Google Drive** and **MSOffice 365.** See **here** [153] for further information.
- Use the OCR engine to avail of advanced optical character recognition. See **here** [594] for further information.

Edit Documents

- Add **Watermarks,** [539] **Barcodes,** [549] **Images** [552] and **Backgrounds** [542] to documents.
- Edit document pages, with options to **Number,** [585] **Rotate,** [578] **Split,** [591] **Resize,** [582] **Replace,** [568] **Delete,** [571] **Export,** [195] **Insert,** [555] **Extract** [563] and **Crop** [574] pages.
- Use editing aids to assist in document editing:
  - **Rulers, Grids and Guides** [525] enable precise placement/measurement of document content.
  - **Snapping** [528] ensures that content is aligned flawlessly.
- Use **Macros** [830] to determine complicated components of the output process in simple terms.
- Use the **Preferences** [229] options to customize the workspace and application settings.
- Use the **JavaScript Console** [526] to add JavaScript to documents.
- Use the **Launch Applications** [289] toolbar to open third party software from **PDF-XChange Editor**.

- Customize toolbars in order to group specified functions and save space on the user interface. See **here** ⟨486⟩ for further information.
- Use the **Form Toolbar** ⟨320⟩ to create and edit fillable forms.
- View/edit portfolio files.

Utilize Tools and Features to Enhance Documents

- The **File Attachment** ⟨717⟩ and **Sound Tool** ⟨720⟩ add links to external files and sound effects to documents.
- The **Highlight,** ⟨677⟩ **Strikeout** ⟨680⟩ and **Underline Text** ⟨683⟩ tools can be used to edit and enhance document text.
- The **Link Tool** ⟨736⟩ creates links to external sources.
- The **Loupe Tool** ⟨647⟩ and **Pan and Zoom** ⟨650⟩ pane provide dynamic methods to view and edit documents at increased/decreased levels of zoom.
- The **Measuring Tools** ⟨723⟩ can be used to measure the distance between document locations and the perimeter/area of customized shapes. The **Calibrate Measurement** ⟨734⟩ feature can be used to create scales for these tools.
- The **Read Out Loud Feature** ⟨861⟩ can be used to read selected text out loud.
- The **Shape Tools** ⟨471⟩ can be used to add adjustable shape annotations to documents. Multiple default shapes are available, such as circles and rectangles, as well as the option to add freehand annotations.
- The **Snapshot Tool** ⟨271⟩ takes screenshots of pages/selected page content and pastes a bitmap copy to the clipboard.
- The **Stamp Tool** ⟨704⟩ can be used to add standard stamps to documents or create custom stamps from input material.
- There are four ways to add comments to documents:
  - The **Sticky Note Tool** ⟨664⟩ is an effective way to add long notes without obscuring original content.
  - The **Typewriter Tool** ⟨667⟩ adds typewriter-style comments to documents.
  - The **Text Box Tool** ⟨670⟩ adds comments contained in text boxes to documents.
  - The **Callout Tool** ⟨673⟩ is similar to the **Text Box Tool,** but has the additional option to add an adjustable arm to the comment in order to highlight specific document locations.
- The **Edit Comments Tool** ⟨661⟩ provides an efficient way to edit multiple comments simultaneously.
- The **Edit Content Tool** ⟨808⟩ is used to edit existing document content.
- The **Redaction** ⟨603⟩ feature is used to redact documents and permanently delete document content.
- The **Spell Check** ⟨607⟩ feature is used to check document spelling.
- The **Comment Styles Palette** ⟨625⟩ can be used to save customized comment and annotation styles for subsequent use.

Use Editing Panes to Assist in Document Editing

- The **Bookmarks Pane** ⌐493⌐ is used to create and edit document bookmarks.
- The **Thumbnails Pane** ⌐497⌐ is used to view/edit document pages as thumbnails.
- The **Named Destinations Pane** ⌐503⌐ is used to create and edit document locations of user-defined specific interest.
- The **Content Pane** ⌐505⌐ is used to identify and edit base content in documents.
- The **Signatures Pane** ⌐508⌐ is used to view/edit digital signatures, and to sign documents.
- The **Layers Pane** ⌐511⌐ is used view/edit optional document layers that can be created using applications such as **InDesign, AutoCAD** and **Visio.**
- The **Comments Pane** ⌐514⌐ is used to view/edit document comments created using the comment tools detailed above.
- The **Attachments Pane** ⌐517⌐ is used to create and edit document attachments.
- The **Fields Pane** ⌐519⌐ is used to create and edit document fields, such as check boxes, radio buttons and dropdown menus.
- The **Properties Pane** ⌐224⌐ is used to view and and edit the properties of selected content.

Additionally, see the **Operations Guide** ⌐48⌐ for step-by-step instructions on all available operations in **PDF-XChange Editor.**

The **User Interface** is detailed **here.** ⌐41⌐

4   Explore the User Interface

Explore the User Interface

The **PDF-XChange Editor** user interface appears as below:
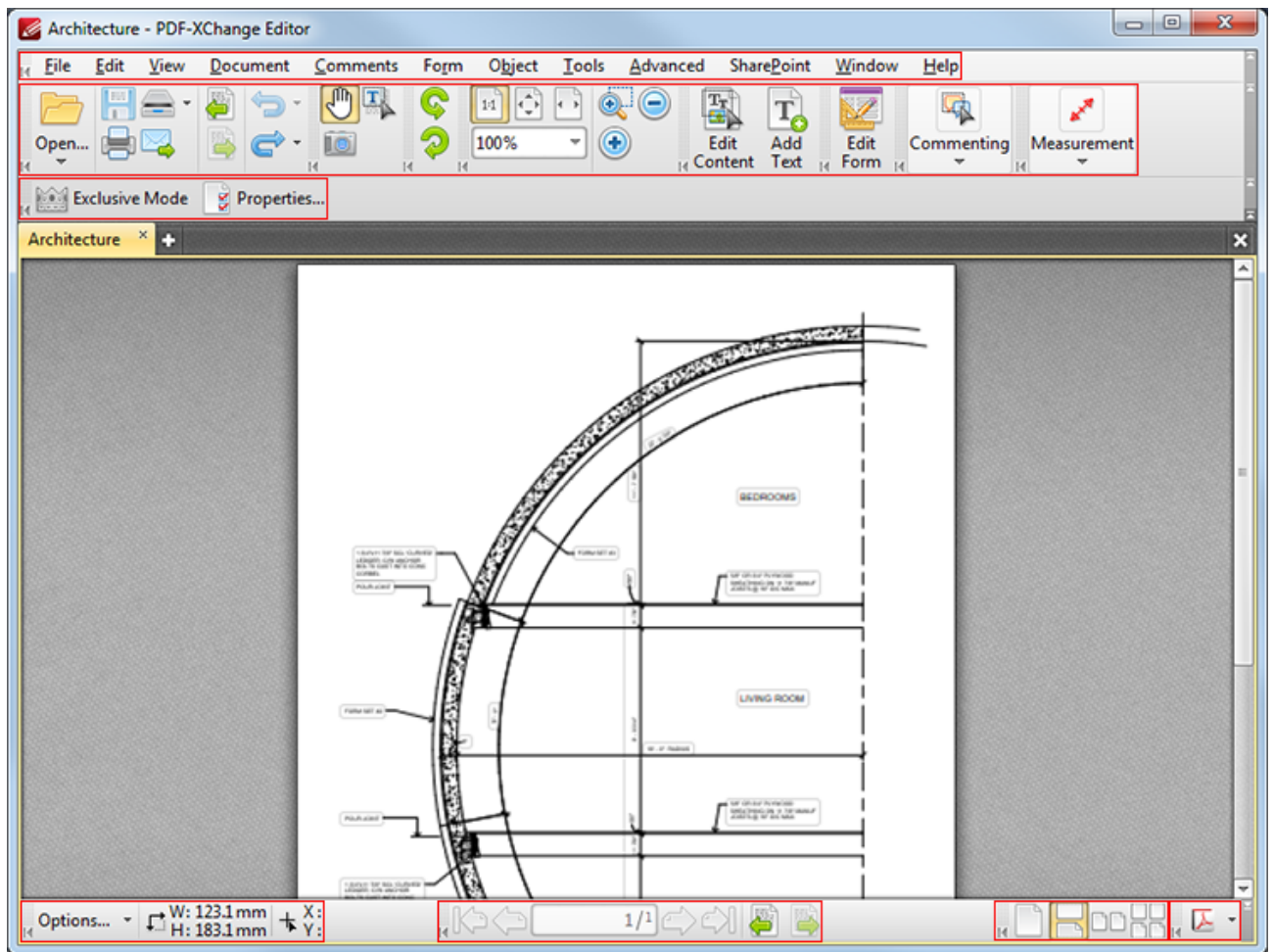

Figure 1. PDF X-Change Editor Main Window

Please take note of the highlighted areas. These are important to use in order to get the most out of the software. They are outlined below:

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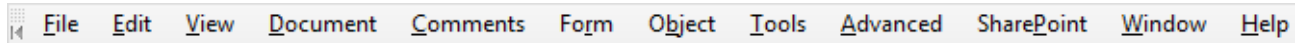
Figure 2. Menu Toolbar

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

- **File** |150| contains file-level operations such as open, close, save and print documents.
- **Edit** |215| contains editing options such as cut, copy, paste and delete selected content.
- **View** |297| 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** |534| contains document editing options such as add/remove watermarks, edit backgrounds, crop pages and digital signature options.
- **Comments** |611| contains options for editing document comments, such as converting comments to base content, importing/exporting comments and creating a comment summary.
- **Form** |627| contains options for managing, highlighting and creating document form fields such as radio buttons, dropdown menus and barcodes.
- **Object** |629| contains object-specific commands such as resizing and repositioning content items.
- **Tools** |632| contains submenus of the **PDF-XChange Editor** tools, which can be used to manipulate, edit and annotate documents.
- **Advanced** |757| contains options that relate the creation and management of document bookmarks.
- **SharePoint** |786| contains options that relate to files associated with the **Microsoft Office SharePoint Server.**
- **Window** |788| contains options that relate to the display of the main window.
- **Help** |790| contains links to software assistance, such as the **PDF-XChange** website and user forum.

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 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**. See **here** |486| for further details.

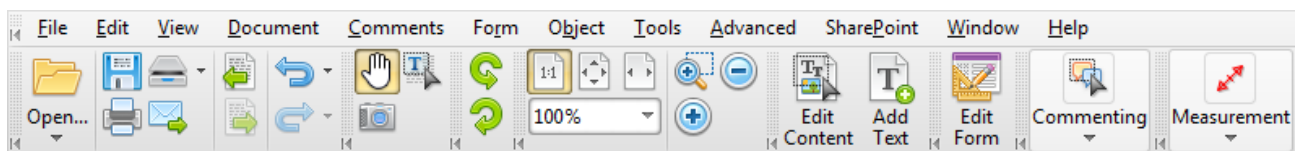The **Shortcut Toolbar** is located at the top of the main window:

Figure 3. Shortcut Toolbar

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

Open is used to open files.

Save is used to save files.

Print is used to print files. See **here** 198 for further information.

Scan is used to create a new PDF document from scanned content. Click the arrow to open the dropdown menu for further scan shortcuts. See **here** 186 for further information.

Email is used to email files. See **here** 190 for further information.

Previous View moves to the previous active view within the main window.

Next view moves to the next active view within the main window. This shortcut becomes available when the **Previous View** shortcut has been used.

Undo reverses the most recent editing action. Click the arrow adjacent to the icon to view/select the most recent actions.

Redo reverses the most recent undo. Click the arrow adjacent to the icon to view/select the most recent actions.

The **Hand Tool** is the default tool of **PDF-XChange Editor.** It is used to scroll through the document pages. Click and drag to scroll.

The **Snapshot Tool** is used to take document snapshots. See **here** 638 for further information.

The **Select Text Tool** is used to select text for editing. See **here** 640 for further information.
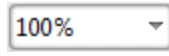
Rotate Clockwise is used to rotate files clockwise. Click to rotate documents ninety degrees.

Rotate Counterclockwise is used to rotate files counterclockwise. Click to rotate documents ninety degrees.

The **Actual Size** button sets the zoom level to the actual document size within the viewing pane.

The **Fit Page** button sets the borders of files to match those of the viewing pane.

The **Fit Width** button fits files to match the width of the viewing pane.

The **Zoom Dropbox** is used to select standard zoom settings. Click the dropdown arrow to view available options. Alternatively, enter a custom figure in the number box.

The **Zoom Tool** increases the current 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.

The **Zoom In** button increases the zoom level.

The **Zoom Out** button decreases the zoom level.

The **Edit Content Tool** is used to edit exiting content. See **here** 655 for further information.

The **Add Text** tool is used to add text to existing content. See **here** 656 for further information.

The **Edit Form** feature enables the creation and editing of document form fields such as radio buttons, dropdown menus and barcodes. See **here** 320 for further information.

Click **Commenting** to view options that relate to the creation of document comments and annotations:
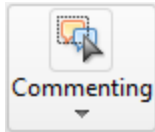
Figure 4. Commenting Icon

The following options are available:
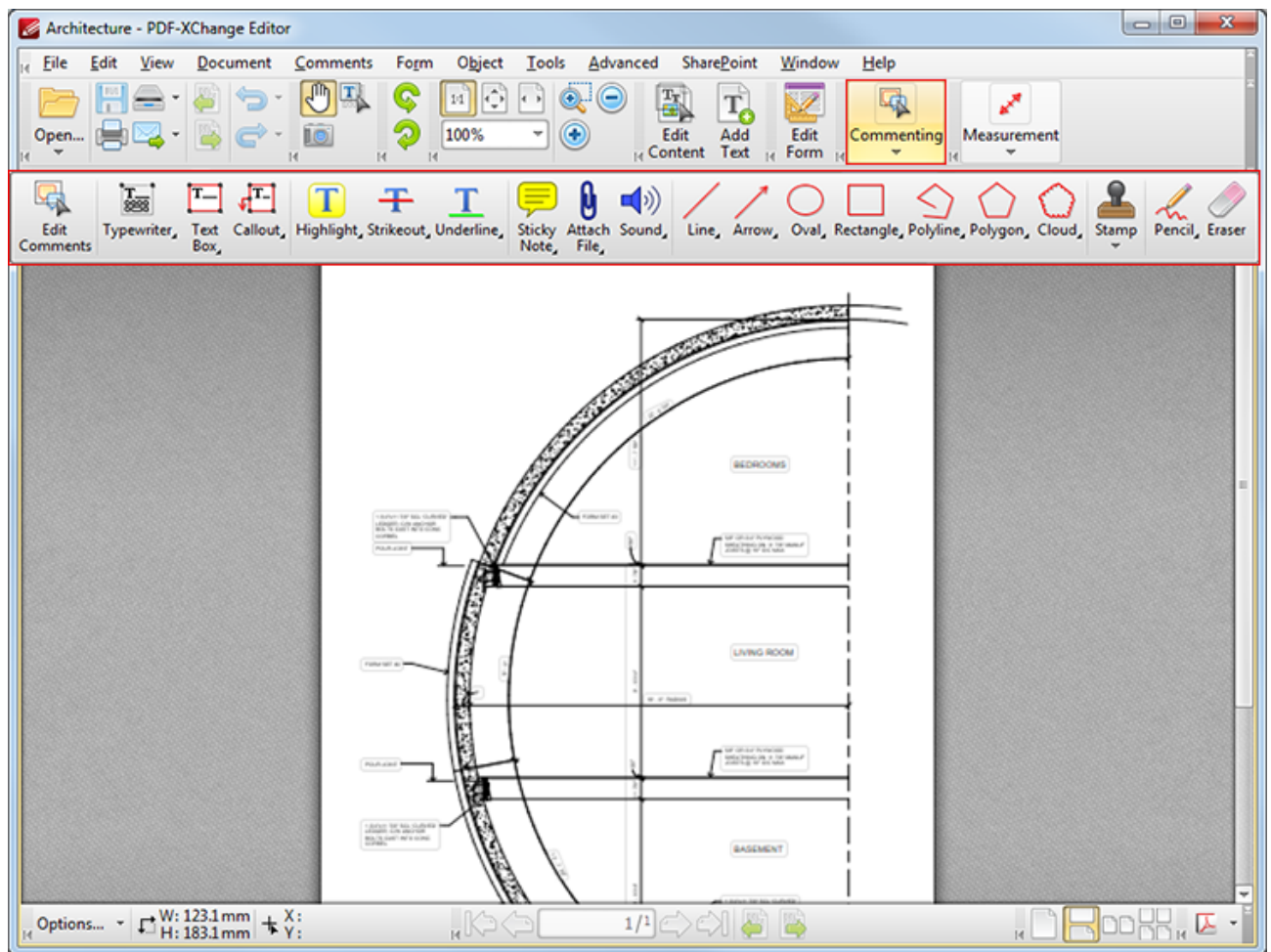
Figure 5. Commenting Toolbar

- Click **Edit Comments** to select and edit existing comments/annotations. See **here** 661 for further information.
- Click **Typewriter** to add typewriter-style comments to documents. See **here** 667 for further information.

- Click **Text Box** to add interactive text-box comments to documents. See <u>here</u> ₆₇₀ for further information.
- Click **Callout** to add interactive callout annotations to documents. These annotations are used to highlight specific areas within documents. See <u>here</u> ₆₇₃ for further information.
- Click **Highlight** to highlight existing document text. See <u>here</u> ₆₇₇ for further information.
- Click **Strikeout** to strike-through existing document text. See <u>here</u> ₆₈₀ for further information.
- Click **Underline** to underline existing document text. See <u>here</u> ₆₈₃ for further information.
- Click **Sticky Note** to add sticky note annotations to documents. Sticky notes appear as small yellow icons within documents. The information they contain is displayed when the pointer is hovered over icons/when icons are double-clicked. See <u>here</u> ₆₆₄ for further information.
- Click **Attach File** to attach files to documents. When this process is complete an icon will be displayed in the active document. When icons are clicked subsequently the associated file will open. See <u>here</u> ₇₁₇ for further information.
- Click **Sound** to add audio content to documents. When this process is complete an icon will be displayed in the active document. When icons are clicked subsequently 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 <u>here</u> ₇₂₀ for further information.
- Click **Line/Arrow** to add line/arrow annotations to documents. See <u>here</u> ₆₈₆ for further information.
- Click **Oval** to add oval annotations to documents. See <u>here</u> ₆₉₂ for further information.
- Click **Rectangle** to add rectangle annotations to documents. See <u>here</u> ₆₈₉ further information.
- Click **Polyline** to add a series of connected, interactive lines to documents. See <u>here</u> ₆₉₅ for further information.
- Click **Polygon** to add customized polygon annotations to documents. See <u>here</u> ₆₉₈ for further information.
- Click **Cloud** to add cloud annotations to documents. See <u>here</u> ₇₀₁ for further information.
- Click **Stamp** to add stamp annotations to documents. Several default stamps are available and it is also possible to create custom stamps. See <u>here</u> ₇₀₄ for further information.
- Click **Pencil** to add freehand annotations to documents. Click **Eraser** to erase pencil lines. See <u>here</u> ₇₁₄ for further information.

Click **Measurement** to access the measurement tools:
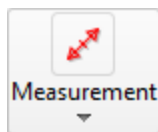
Figure 6. Measurement Icon

The following options are available:

The **Distance Tool** is used to measure the distance between two points. See <u>here</u> ₇₂₅ for further information.

The **Perimeter Tool** is used to measure the distance between multiple points. See **here**⁷²⁸ for further information.

The **Area Tool** is used to measure the area within designated document lines. See **here**⁷³¹ for further information.

The **Properties Toolbar** is located beneath the **Shortcut Toolbar.** The appearance and options of the **Properties Toolbar** depend on the format of object selected. A sample **Properties Toolbar** is displayed below:
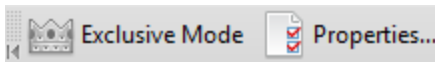
Figure 7. Properties Toolbar

Press Ctrl+E to show/hide the **Properties Toolbar.** See **here**⁴⁸⁴ for further information.

The **Document Options Toolbar** is located on the left in the lower toolbar and appears as below:
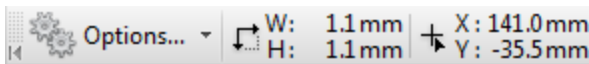
Figure 8. Document Options Toolbar

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

The **Page Navigation Toolbar** is located in the center of the lower toolbar and appears as below:
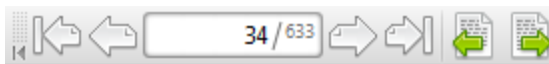
Figure 9. Page Navigation Toolbar

These buttons are used to navigate files and file pages. See **here**⁴⁷⁸ for further information.

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

Figure 10. Page Layout Toolbar

These buttons determine the page display. See **here**⁴⁸⁰ for further information.

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

Figure 11. Launch Application Toolbar

This toolbar can be used to create convenient shortcuts to third-party applications. See **here** 482 for further information.

Additionally, please note that several of the keyboard shortcuts relate to the commands displayed on the user interface. See **here** 814 for a comprehensive list of available shortcuts.

5 **Operations Guide**

![PDF icon]**Operations Guide**

This section of the manual details the most important operations and functions in **PDF-XChange Editor.** There are six subsections that each cover different elements of the application:

![icon] **Annotations Guide** ⌐49⌐ - a breakdown of operations that relate to annotations, including how to add shapes and comments to documents, attach files, create/edit/clone comment styles, group edit comments and several further operations associated with comments and annotations.

![icon] **Bookmarks Guide** ⌐61⌐ - a breakdown of bookmark operations, including the multiple ways in which bookmarks can be created, edited and utilized.

![icon] **Document Operations Guide** ⌐66⌐ - a breakdown of document-level operations, including how to create, edit, open, measure and save documents.

![icon] **Editing Panes Guide** ⌐116⌐ - a breakdown of how to open and utilize the **PDF-XChange Editor** editing panes.

![icon] **Forms Guide** ⌐121⌐ - a breakdown of operations that relate to the creation and utilization of fillable forms, including how to add/edit barcodes, buttons, check boxes, digital signatures, dropdown menus, list boxes, radio boxes and text fields to documents.

![icon] **Workspace Guide** ⌐127⌐ - a breakdown of operations that relate to the customization and navigation of the workspace.

5.1   Annotations Guide

Annotations Guide

PDF-XChange Editor can be used to create and edit document comments and annotations in multiple ways. Comments and annotations can be used to enhance documents and assist in the editing process. Click the links below for instructions on how to:

▼ **Add Arrow Annotations to Documents**

1. Click **Tools** in the **Menu Toolbar.** ⃞306

2. Hover over **Comment and Markup Tools.**

3. Click **Arrow Tool.**

4. Follow the instructions detailed **here.** ⃞686

▼ **Add Callout Annotations to Documents**

1. Click **Tools** in the **Menu Toolbar.** ⃞306

2. Hover over **Comment and Markup Tools.**

3. Click **Callout Tool.** The point will turn into a crosshairs icon.

4. Move the crosshairs to the desired location and click to create the callout annotation. See **here** ⃞673 for further information.

▼ **Add Cloud Annotations to Documents**

1. Click **Tools** in the **Menu Toolbar.** ⃞306

2. Hover over **Comment and Markup Tools.**

3. Click **Cloud Tool.**

4. Follow the instructions detailed **here.** 701

Add Freehand Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Pencil Tool.**

4. Follow the instructions detailed **here.** 714

Add Line Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Line Tool.**

4. Follow the instructions detailed **here.** 686

Add Oval Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Oval Tool.**

4. Follow the instructions detailed **here.** 692

Add Polygon Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Polygon Tool.**

4. Follow the instructions detailed **here.** 698

▼ Add Polygon Line Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Polygon Line Tool.**

4. Follow the instructions detailed **here.** 695

▼ Add Rectangle Annotations to Documents

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Rectangle Tool.**

4. Follow the instructions detailed **here.** 689

▼ Add Stamps to Documents

Stamps can be used to display the status of documents. The **Stamps Palette** contains several preloaded stamps, and custom stamps can be created for specific purposes.

Figure 1. Stamps Palette

Follow the steps below to open and utilize the **Stamp Tool:**

    1. Click **Tools** in the **Menu Toolbar.** [306]

    2. Hover over **Comment and Markup Tools.**

    3. Click **Stamp Tool.**

    4. Follow the instructions detailed **here.** [704]

▼ **Add Sticky Note Annotations to Documents**

Sticky notes provide a convenient way to annotate documents. When a sticky note is completed it displays as a small icon within the document. Users can click the icon in order to

view the content of the note. This makes it possible to store large amounts of text without taking up unnecessary space in the working area:
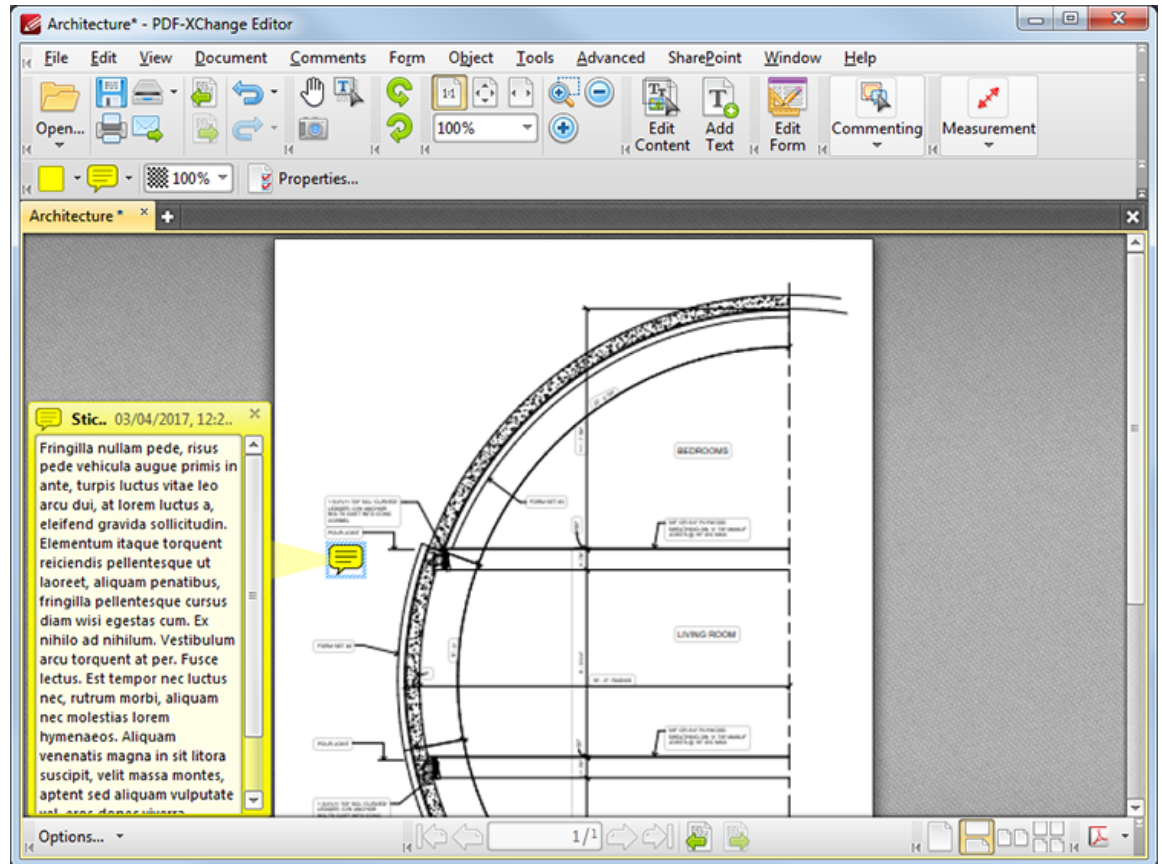
Figure 2. Expanded Sticky Note Annotation

Follow the steps below to open and utilize the **Sticky Note Tool:**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Sticky Note Tool.** The pointer will turn into a crosshairs icon.

4. Move the crosshairs to the desired location and click to create the sticky note annotation. See **here** 664 for further information.

▼ **Add Text Box Annotation to Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Text Box Tool.** The pointer will turn into a crosshairs icon.

4. Move the crosshairs to the desired location and click to create the text box annotation. See **here** 670 for further information.

▼ **Add Text To Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Content Editing Tools.**

3. Click **Add Text Tool.**

4. Follow the instructions detailed **here.** 656

▼ **Add Typewriter-Style Annotations to Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **Typewriter Tool.** The pointer will turn into a crosshairs icon.

4. Move the crosshairs to the desired location and click to create the typewriter-style annotation. A blue rectangle will appear. Enter the desired comment text in the rectangle. See **here** 667 for further information.

▼ **Attach Files to Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Click **File Attachment Tool.** The pointer will turn into a crosshairs.

4. Move the crosshairs to the desired location and click to create the link. The **Open Files** dialog box will open.

5. Select the desired file and click **Open.**

▼ **Clone and Edit Comment Styles**

All comments and annotations can be customized to meet specific needs and aesthetic tastes with regard to style, color and other properties. If the same style is going to be used multiple times then it is useful to save the parameters. Follow the steps outlined below to do this:

1. Click **Comments** in the **Menu Toolbar.** 306

2. Click **Comment Styles Palette.** The **Comment Styles Palette** pane will open:

Figure 3. Comment Styles Palette

3. Select the desired comment style and click **Clone.** The style can then be edited and saved for subsequent use. See **here** 625 for further information on the **Comment Styles Palette.**

Right-click annotation icons in the **Shortcut Toolbar** 42 for quick access to customized styles:
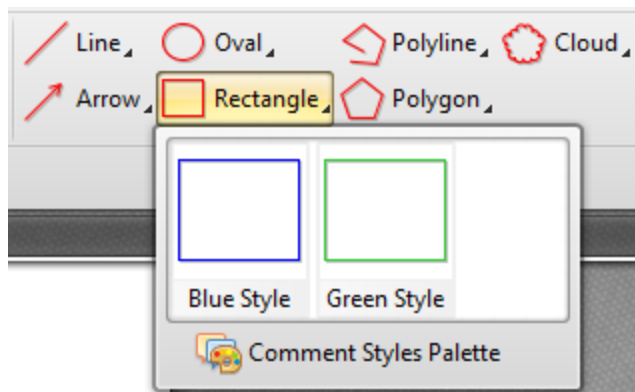
Figure 4. Customized Styles Shortcut

▼ **Convert Annotations into Base Content**

There is an important distinction to make when using **PDF-XChange Editor** to edit documents. This is because documents are composed of two layers. The first layer consists of the original PDF content, such as text and/or images. The second layer, which is placed over the first, consists of comments and/or markups added to the document using the software. These layers exist and operate independently of each other. This means that editing commands applied to original PDF content/comments and markups will apply only in relation to the layer in which selected items are located. When comments and markups are flattened they are moved to the same layer as original PDF content and can then be edited and utilized simultaneously. Follow the steps below to convert annotations into base content:

1. Click **Comments** in the **Menu Toolbar.** 306

2. Click **Flatten Comments.** The **Flatten Annotations** dialog box will open:
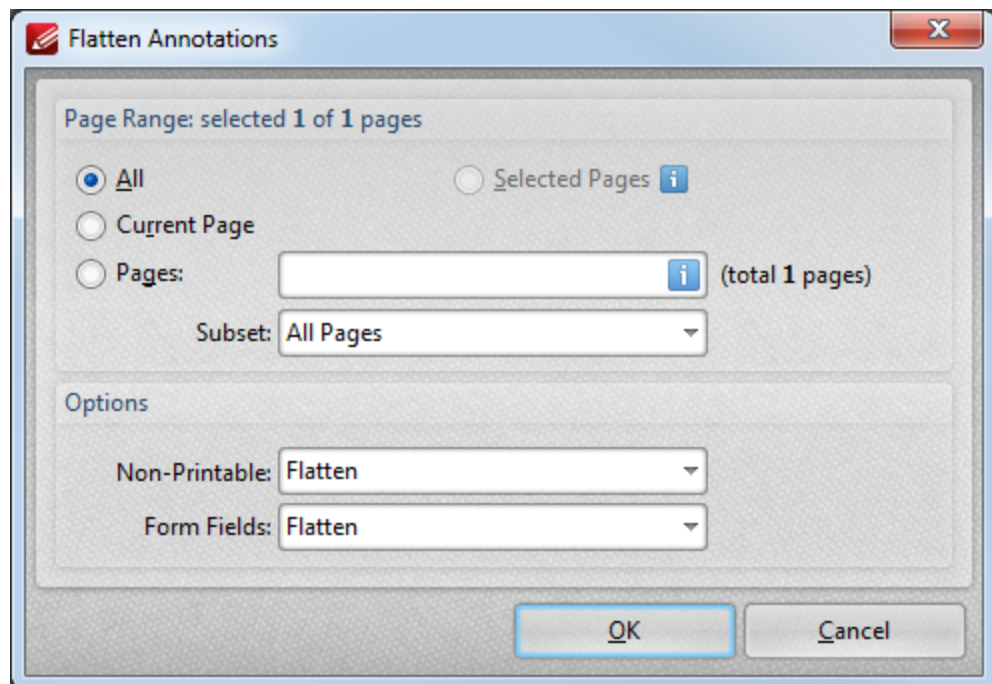
Figure 4. Flatten Annotations Dialog Box

3. Determine parameters as detailed **here.** 613

4. Click **OK.**

▼ **Create Links within Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Link Tools.**

3. Click **Link Creation Tool.**

4. Follow the instructions detailed **here.** 736

▼ **Determine which Comments are Shown/Hidden**

1. Click **Comments** in the **Menu Toolbar.** 306

2. Hover over **Show Comments.** The following menu will be displayed:
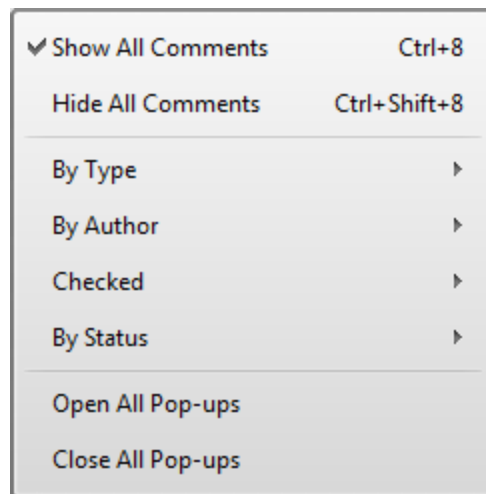
Figure 5. Show Comments Options

3. Follow the instructions detailed **here.** 622

▼ **Duplicate Comments**

1. Select the desired comments.

2. Click **Object** in the **Menu Toolbar.** 306

3. Click **Duplicate Annotations.**

4. Follow the instructions detailed **here.** 630

▼ **Edit Comment Text**

1. Select the comment text. Available parameters will be displayed in the **Properties Toolbar.** 484

2. Adjust parameters as detailed **here.** 863

▼ **Export Comments to a Data File**

1. Click **Comments** in the **Menu Toolbar.** 306

2. Click **Export Comments to a Data File.**

3. The **Save File** dialog box will open.

4. Enter a name for the file in the **File name** text box.

5. Click **Save.**

▼ **Import Comments from a Data File**

1. Click **Comments** in the **Menu Toolbar.** 306

2. Click **Import Comments.** The **Open Files** dialog box will open.

3. Select the file that contains the desired comments and click **Open.**

▼ **Reposition Comments**

1. Select the desired comments.

2. Click **Object** in the **Menu Toolbar.** 306

3. Click **Transform Selection.**

4. Follow the instructions detailed **here.** 629

▼ **Reset Comment Styles**

1. Click **Comments** in the **Menu Toolbar.** 306

2. Click **Comment Styles Palette.** The **Comment Styles Palette** will open:

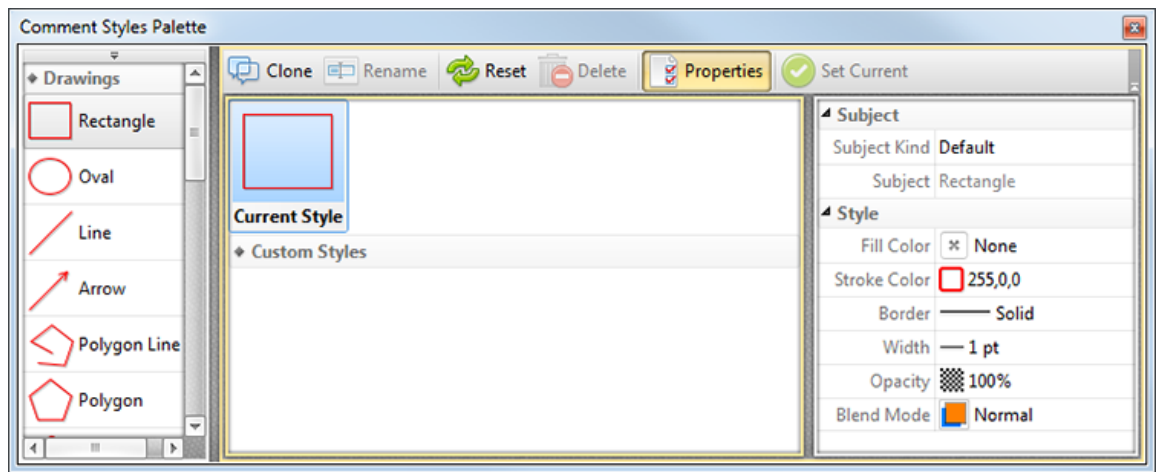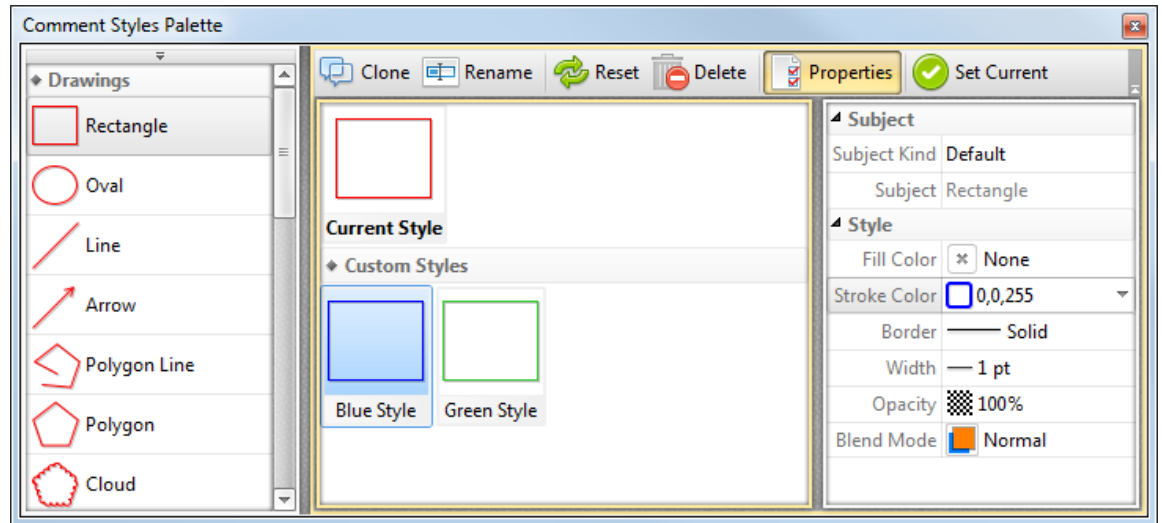**Figure 2.** Comment Styles Palette

3. Select the desired style.

4. Click **Reset.**

▼ **Resize Comments**

1. Select the desired comments.

2. Click **Object** in the **Menu Toolbar.** 306

3. Click **Transform Selection.**

4. Follow the instructions detailed **here.** 629

▼ **Rotate Comments**

1. Select the desired comments.

2. Click **Object** in the **Menu Toolbar.** 306

3. Click **Transform Selection.**

4. Follow the instructions detailed **here.** ₆₂₉

▼ Set Customized Style as Default

PDF-XChange Editor displays the current comment style for annotation tools in the **Shortcut Toolbar.** ₄₂ This style will be selected automatically when the associated tool is selected. The default comment/annotation style is selected by default. Follow the steps below to set a customized style as the default setting for the tool:

1. Click **Comments** in the **Menu Toolbar.** ₃₀₆

2. Click **Comment Styles Palette.** The **Comment Styles Palette** will open and customized styles will be displayed:
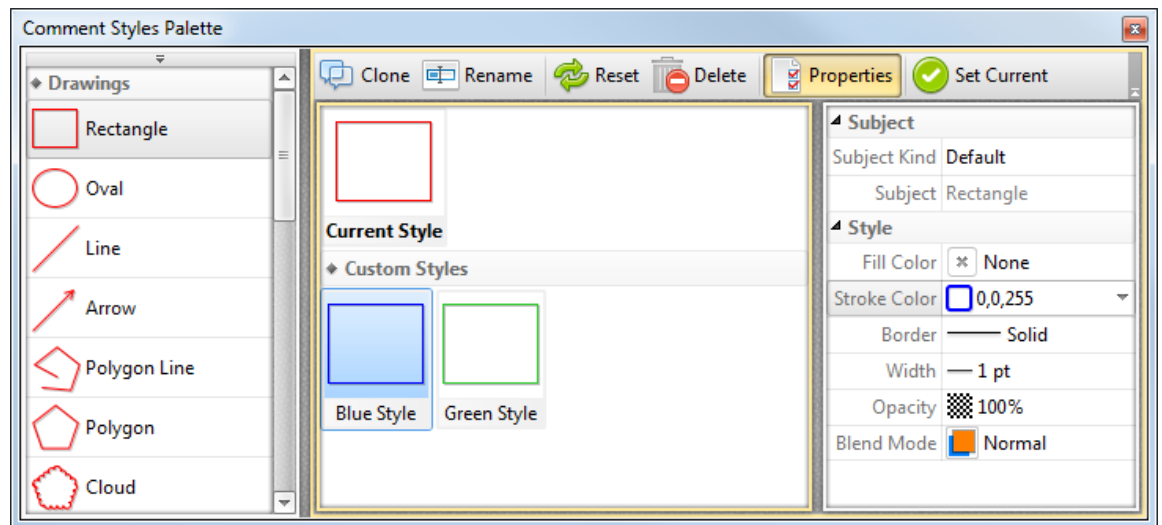
Figure 3. Comment Styles Palette

3. Select the desired style and click **Set Current.**

Editing options are available after tools have been used to create content. See **here** ₈₆₅ for further information.

Additionally, several of the **Keyboard Shortcuts** ₈₁₄ relate to annotations.

5.2   Bookmarks Guide

Bookmarks Guide

PDF-XChange Editor features several operations that assist in the creation and manipulation of bookmarks. Bookmarks provide a useful method of designating and navigating to important document locations. Click the links below for instructions on how to:

▼ **Add Text to Bookmark Titles**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Add Text to Bookmark Title.**

4. Follow the instructions detailed **here.** 769

▼ **Create Bookmarks**

1. Move to the desired new bookmark location.

2. Click **View** in the **Menu Toolbar.** 306

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

4. Click the **New Bookmark** button. A new entry will appear in the **Bookmarks** pane. See **here** 493 for further information.

The keyboard shortcut for this operation is Ctrl+Shift+B.

▼ **Create Bookmarks by Page Number**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Bookmark Every Nth Page.**

4. Follow the instructions detailed **here.** 767

▼ **Create Bookmarks From a Table of Contents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Basic Tools.**

3. Click **Select Text Tool.**

4. Select the text from which the bookmarks are to be made.

5. Click **Advanced** in the **Menu Toolbar.**

6. Hover over **Bookmarks.**

7. Click **Bookmark Table of Contents.**

8. Follow the instructions detailed **here.** 759

▼ **Create Bookmarks From Page Text**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Generate Bookmarks From Page Text.**

4. Follow the instructions detailed **here.** 761

▼ **Create Bookmarks From Text Files**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Generate Bookmarks From Text File.**

4. Follow the instructions detailed **here.** 766

▼ **Edit the Case of Bookmark Text**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Change Bookmark Case.**

4. Follow the instructions detailed **here.** 771

▼ **Export Bookmarks to HTML Files**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Export Bookmarks to HTML File.**

4. Follow the instructions detailed **here.** 782

▼ **Export Boomarks to Text Files**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Export Bookmarks to Text File.**

4. Follow the instructions detailed **here.** 783

▼ **Find and Replace Bookmark Text**

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Find And Replace Bookmark Text.**

4. Follow the instructions detailed **here.** [775]

▼ **Sort Bookmarks**

1. Click **Advanced** in the **Menu Toolbar.** [306]

2. Hover over **Bookmarks.**

3. Click **Sort Bookmarks.**

4. Follow the instructions detailed **here.** [779]

▼ **Use Bookmarks to Create a Table of Contents**

1. Click **Advanced** in the **Menu Toolbar.** [306]

2. Hover over **Bookmarks.**

3. Click **Build Table of Contents.**

4. Follow the instructions detailed **here.** [777]

▼ **Validate Bookmarks**

1. Click **Advanced** in the **Menu Toolbar.** [306]

2. Hover over **Bookmarks.**

3. Click **Validate Bookmarks.**

4. Follow the instructions detailed **here.** [780]

Additionally, several of the **Keyboard Shortcuts** [820] relate to the creation and editing of bookmarks.

5.3 Document Operations Guide

Document Operations Guide

Detailed in this section are operations in **PDF-XChange Editor** that relate to documents. Click the subsection titles to open the associated page of the manual:

Create Documents [67] - a breakdown of the ways in which it is possible to create PDF documents, including how to create documents from image files, Markdown files, text files, RTF files and the local scanner. Also included is how to create blank documents and how to create a single document from multiple input files.

Edit Documents [73] - a breakdown of the the multiple ways in which it is possible to edit documents, including how to add dynamic features, certify documents, convert documents into various formats, restructure/crop/OCR/delete pages, manipulate base content, set document zoom, insert content, adjust document tabs, sign/validate documents, edit text and measure documents.

Open Documents [97] - a breakdown of how to open documents located in URLs, **Dropbox, SharePoint, Google Drive** and the local computer.

Miscellaneous Document Operations [99] - a breakdown of miscellaneous document operations, including how to add/edit JavaScript, import/export customized settings, work with named destinations and utilize sessions.

Save Documents [113] - a breakdown of the way that documents can be saved, including how to save copies of documents, save multiple documents simultaneously and save documents to specific places such as **Dropbox, Google Drive** and **SharePoint.**

5.3.1   Create Documents

Create Documents

PDF-XChange Editor can be used to create new PDF documents in multiple ways. See below for instructions on how to:

▼ **Create Blank PDF Documents**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Select **With Blank Pages.** The **New Empty Document** dialog box will open:
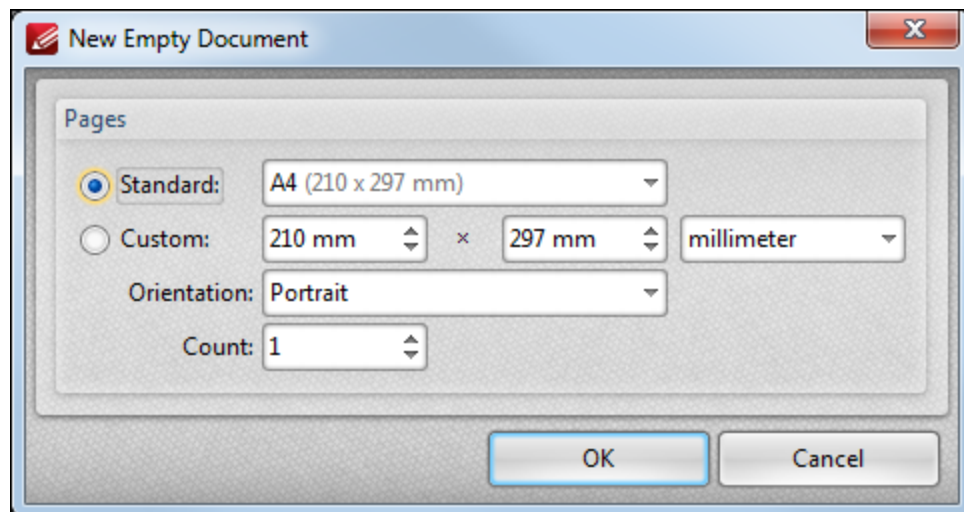
Figure 1. New Empty Document Dialog Box

4. Determine parameters as detailed **here.** 162

5. Click **OK**.

The keyboard shortcut for this operation is Ctrl+N.

▼ Create PDF Documents from Image Files

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Select **From Image File(s).** The **Images To PDF** dialog box will open:
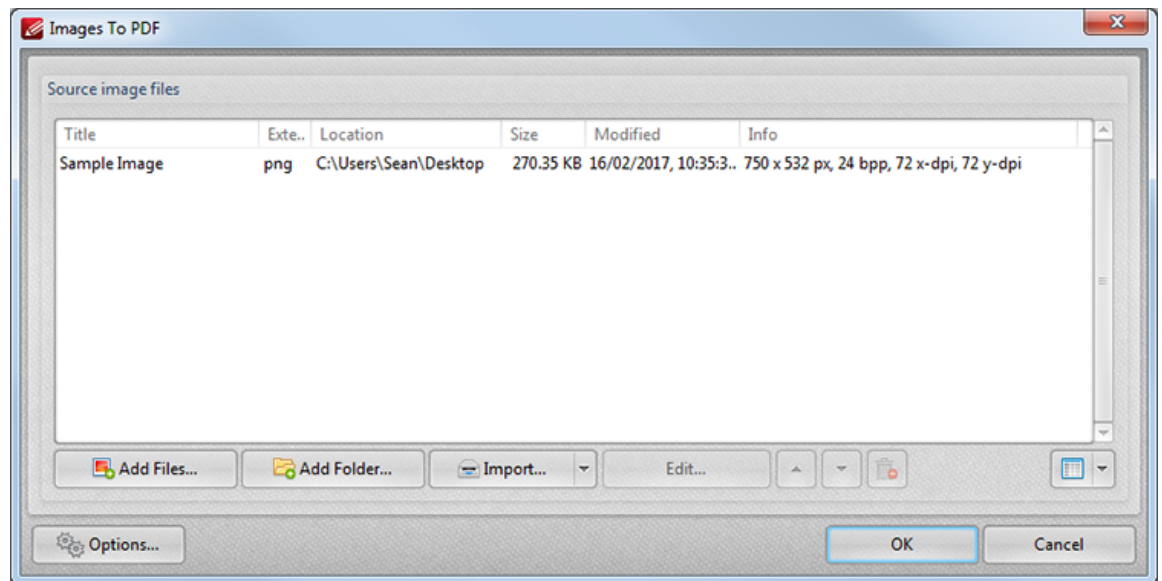
Figure 2. Images to PDF Dialog Box

4. Determine parameters as detailed **here.** 177

5. Click **OK.**

▼ Create PDF Documents from Markdown Files

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Select **From Markdown.** The **Convert Markdown To PDF** dialog box will open:
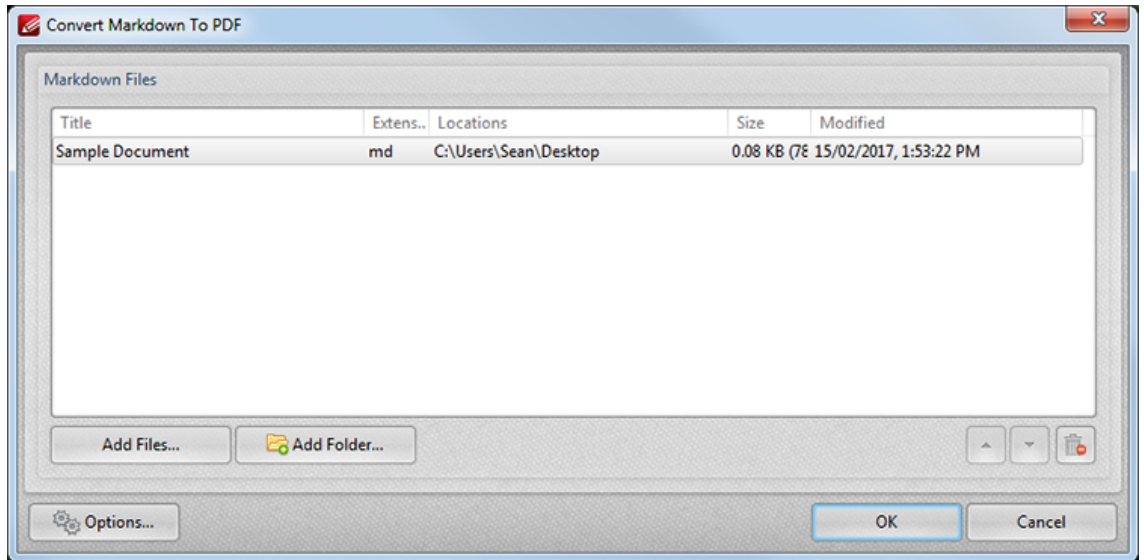
Figure 3. Markdown To PDF Options Dialog Box

4. Determine parameters as detailed **here.** [173]

5. Click **OK**.

▼ **Create PDF Documents from Multiple Files**

1. Click **File** in the **Menu Toolbar.** [306]

2. Hover over **New Document.**

3. Select **Combine Files into a Single PDF.** The **Combine Files** dialog box will open:
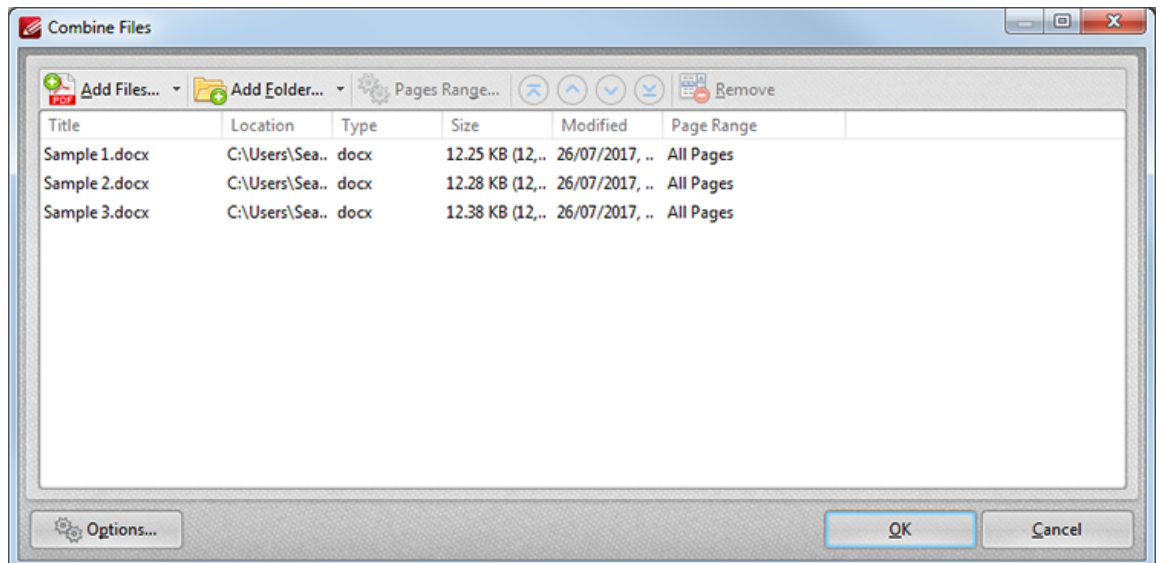
4. Determine parameters as detailed **here.** 165

5. Click **OK.**

▼ **Create PDF Documents From Text Files**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Select **From Text Files.** The **Convert Text Files to PDF** dialog box will open:
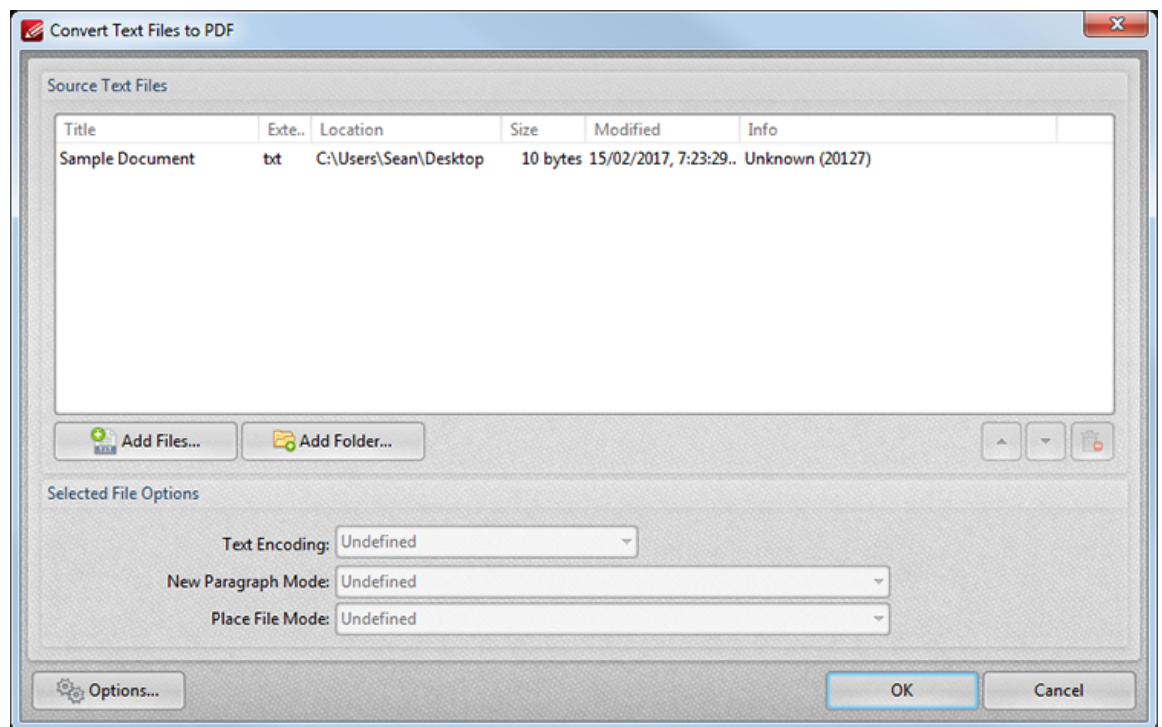
Figure 5. Convert Text Files to PDF Dialog Box

4. Determine parameters as detailed **here.** 169

5. Click **OK.**

▼ **Create PDF Documents from the Local Scanner**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Hover over **From Scanner.** The following submenu will be displayed:
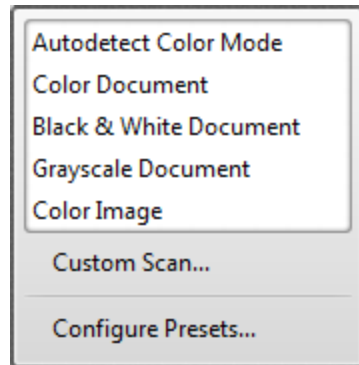
Figure 6. Scan Submenu

4. Click either a preset mode (these are displayed in the white area) or **Custom Scan.**

5. Determine parameters and initiate the scan as detailed **here.** 186

▼ **Create PDF Documents from RTF Files**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **New Document.**

3. Select **From Rich Text Format (RTF) Files.** The **Convert RTF Files To PDF** dialog box will open:
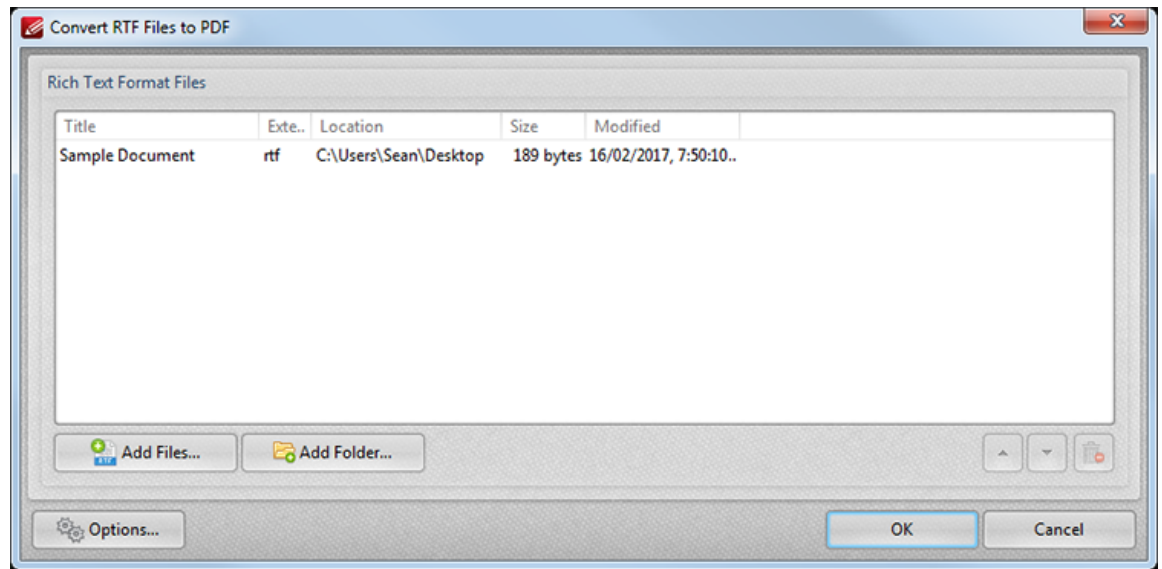
Figure 7. Convert RTF Files to PDF Dialog Box

4. Determine parameters as detailed **here.** [175]

5. Click **OK.**

5.3.2   **Edit Documents**

![PDF-XChange Editor icon]**Edit Documents**

PDF-XChange Editor can be used to edit documents in multiple ways. See below for instructions on how to:

▼ **Add Backgrounds to Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Background.**

3. Click **Add.** The **Add Background** dialog box will open.

4. Determine parameters as detailed **here.** 542

5. Click **OK.**

▼ **Add Barcodes to Documents**

Barcodes have become an established standard for the concise storage of complex information. They are compatible with most smartphones and tablets and have several useful templates, such as electronic business cards that can be used for contact details and other personal information. They can also be used to link to URLs, create custom messages and send automatic emails. Follow the steps below to add barcodes to documents:

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Add Barcode.** The **Select Barcode Placement Tool** dialog box will open.

3. Click **Drag Barcode Rectangle.**

4. Drag the cursor to determine the size and location of the barcode. The **Add Barcode** dialog box will open.

5. Determine parameters as detailed **here.** [549]

6. Click **Place.**

▼ **Add Bates Numbering to Documents**

Bates numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. It is added to documents in a similar manner to page numbers inserted using a header/footer feature. Follow the instructions below to add Bates numbering:

1. Click **Document** in the **Menu Toolbar.** [306]

2. Hover over **Bates Numbering.**

3. Click **Add.** The **Add Bates Numbering** dialog box will open.

4. Determine parameters as detailed **here.** [545]

5. Click **OK.**

▼ **Add Bates Numbering to Multiple Documents**

Bates numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. It is added to documents in a similar manner to page numbers inserted using a header/footer feature. Follow the instructions below to add Bates numbering to multiple documents:

1. Click **Document** in the **Menu Toolbar.** [306]

2. Hover over **Bates Numbering.**

3. Click **Add to Multiple Files.** The **Add Bates Numbering to Files** dialog box will open.

4. Determine parameters as detailed **here.** [545]

5. Click **OK.**

▼ **Add Headers and Footers to Documents**

Headers and footers are a useful way to add additional information at the top/bottom of documents, such as page numbers and/or the current date. Follow the steps below to add headers and footers to documents:

    1. Click **Document** in the **Menu Toolbar.** 306

    2. Hover over **Header and Footer.**

    3. Click **Add.** The **Add Header and Footer** dialog box will open.

    4. Determine parameters as detailed **here.** 536

    5. Click **OK.**

▼ **Add Images to Documents**

    1. Click **Document** in the **Menu Toolbar.** 306

    2. Click **Add Image.** The **Open Files** dialog box will open.

    3. Select the desired image and click **Open.** The **Add Image** dialog box will open:

    4. Determine parameters as detailed **here.** 552

    5. Click **Place.**

▼ **Add Watermarks to Documents**

Watermarks are used predominately to discourage counterfeiting and display ownership of images and documentation. Follow the steps below to insert watermarks into documents:

    1. Click **Document** in the **Menu Toolbar.** 306

    2. Hover over **Watermarks.**

    3. Click **Add.** The **Add Watermark** dialog box will open.

    4. Determine parameters as detailed **here.** 539

5. Click **OK**.

▼ **Certify Documents and Add an Invisible Signature**

Digital signatures are used to demonstrate the authenticity of documents and increase their security. Follow the instructions below to certify documents and and an invisible digital signature. (The inclusion of an *invisible* digital signature means that the document will not feature a physical signature, but it is still 'signed' and certified to the same level as a document that features a physical signature).

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Certify (Invisible).**

4. Follow the instructions detailed **here.** 597

▼ **Certify Documents and Add a Visible Signature**

Digital signatures are used to demonstrate the authenticity of documents and increase their security. Follow the instructions below to certify documents and and a visible digital signature:

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Certify (Visible).**

4. Follow the instructions detailed **here.** 597

▼ **Check Document Spelling**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Spell Check. PDF-XChange Editor** will then check the document spelling.

3. Follow the instructions detailed **here.** 607

The keyboard shortcut for this operation is F7.

▼ Clear All Document Signatures

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Clear All Signatures.**

▼ Convert Documents to Image Format

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Export.**

3. Click **Export to Image(s).** The **Export to Images** dialog box will open.

4. Determine parameters as detailed **here.** 195

5. Click **OK.**

▼ Convert Documents to Microsoft Excel Format

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Export.**

3. Click **Export to Microsoft Excel.** The **Save File** dialog box will open.

4. Use the **File name** text box to edit the name of the file. The default name is the existing name of the active document.

5. Click **OK.**

▼ Convert Documents to Microsoft Powerpoint Format

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Export.**

3. Click **Export to Microsoft Powerpoint Presentation.** The **Save File** dialog box will open.

4. Use the **File name** text box to edit the name of the file. The default name is the existing name of the active document.

5. Click **Save.**

▼ **Convert Documents to Microsoft Word Format**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Export.**

3. Click **Export to Microsoft Word Document.** The **Save File** dialog box will open.

4. Use the **File name** text box to edit the name of the file. The default name is the existing name of the active document.

5. Click **Save.**

▼ **Copy and Convert Text into Rich Text Format**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Basic Tools.**

3. Click **Select Text Tool.**

4. Select and then right-click the text.

5. Click **Copy as a Rich Text.**

▼ **Create a New Document Window**

1. Click **Window** in the **Menu Toolbar.** 306

2. Click **New Document Window.**

▼ **Crop Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Crop Pages.**

3. Click **Crop Pages.** The **Crop Pages** dialog box will open.

4, Determine parameters as detailed **here.** 574

5. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+T.

▼ **Crop Pages Manually**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Crop Pages.**

3. Click **Crop Page Tool.** The **Crop Tool** dialog box will open.

4. Click **Drag Crop Rectangle.** The pointer will turn into a crosshairs icon.

5. Click and drag to determine the crop area. When the mouse button is released the **Crop Pages** dialog box will open.

6. Determine parameters as detailed **here.** 576

7. Click **OK.**

▼ **Delete Empty Pages**

1. Click **Document** in the **Menu Toolbar.** 306

    2. Hover over **Delete Pages.**

    3. Select **Delete Empty Pages.** The **Delete Empty Pages** dialog box will open.

    4. Determine parameters as detailed **here.** ⬜572

    5. Click **OK.**

▼ **Delete Pages**

    1. Click **Document** in the **Menu Toolbar.** ⬜306

    2. Hover over **Delete Pages.**

    3. Select **Delete Pages.** The **Delete Pages** dialog box will open.

    4. Determine parameters as detailed **here.** ⬜571

    5. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+D.

▼ **Determine Advanced Document Settings**

The advanced document settings can be used to determine base URLs for weblinks, "trapping" options with regard to printing, print dialog presets, binding/language options and settings for when actions determined within documents are executed. Follow the instructions below to access and edit advanced document settings:

    1. Click **File** in the **Menu Toolbar.** ⬜306

    2. Click **Document Properties.**

    3. Click **Advanced** in the **Categories** menu.

    4. Determine parameters as detailed **here.** ⬜210

    5. Click **OK.**

▾ **Determine Document Settings**

Document settings can be used to configure the layout of tabs and windows, document restore options, saving parameters and the PDF-specification of new documents. Follow the instructions below to to access and edit document settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Documents** in the **Categories** menu.

4. Determine parameters as detailed **here.** 232

5. Click **OK.**

▾ **Determine PDF Portfolio File View Parameters**

PDF portfolio files are dynamic files that contain multiple file formats assembled into an integrated PDF unit. Follow the instructions below to determine the manner in which portfolio files are displayed within **PDF-XChange Editor:**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Portfolio.**

3. Determine parameters as detailed **here.** 531

4. Click **OK.**

▾ **Determine Security Settings**

The security settings in **PDF-XChange Editor** determine file open and program launch options when documents are attempting to open files, attachments or sites. Follow the instructions below to determine these settings:

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Document Properties.** The **Document Properties** dialog box will open.

3. Click **Security** in the **Categories** menu.

4. Determine parameters as detailed **here.** 206

5. Click **OK.**

▼ **Edit Document Info**

Document information includes the document title, author, subject, keywords and additional metadata. It has various functions and it used during specific operations such as when documents are edited/saved/signed. Follow the instructions below to edit document information:

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Document Properties.** The **Document Properties** dialog box will open.

3. Click **Description** in the **Categories** menu.

4. Determine parameters as detailed **here.** 204

5. Click **OK.**

▼ **Edit Base Content of Documents**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Content Editing Tools.**

3. Click **Edit Content Tool.**

4. Follow the instructions detailed **here.** 808

▼ **Edit Base Content of Documents in an Alternative Application**

When this feature is used content will update automatically in **PDF-XChange Editor** when it is edited in an alternative application.

1. Click **Edit Content** in the **Shortcut Toolbar.** 42

2. Right-click the content item. A submenu will open.

3. Hover over **Edit Image Using.**

4. Click **Default Application** to edit content in the default content editing application or click **Open With** to select a different application.

▼ **Enable Dynamic Zoom Panes**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Zoom Tools.**

3. Click **Loupe Tool.**

4. Follow the instructions detailed **here.** 647

OR

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Zoom Tools.**

3. Click **Pan and Zoom.**

4. Follow the instructions detailed **here.** 650

▼ **Extract Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Extract Pages.** The **Extract Pages** dialog box will open.

3. Determine parameters as detailed **here.** 563

4. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+E.

▼ **Fit Page to Document Window**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Fit Page.**

The keyboard shortcut for this operation is Ctrl+0.

▼ Fit Page Height to Document Window

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Fit Height.**

▼ Fit Page Width to Document Window

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Fit Width.**

The keyboard shortcut for this operation is Ctrl+2.

▼ Fit Page Width to Document Window and Exclude White Space

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Fit Visible.**

The keyboard shortcut for this operation is Ctrl+3.

▼ Highlight Document Text

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Select **Highlight Text Tool.**

4. Click and drag to highlight text. See **here** 677 for further information.

▼ **Insert Empty Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert Empty Pages.** The **Insert Empty Pages** dialog box will open.

3. Determine parameters as detailed **here.** 557

4. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+I.

▼ **Insert Images**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert Images.** The **Images to PDF** dialog box will open.

3. Determine parameters as detailed **here.** 557

4. Click **OK.**

▼ **Insert Pages From a Different Document**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert Pages.** The **Insert Pages** dialog box will open.

3. Determine parameters as detailed **here.** 555

4. Click **OK.**

▼ **Insert RTF Content**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert RTF.** The **Convert RTF Files to PDF** dialog box will open.

3. Determine parameters as detailed **here.** 562

4. Click **OK.**

▼ **Insert Scanned Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert Scanned Pages.** The **Scan Properties** dialog box will open.

3. Determine properties as detailed **here.** 558

4. Click **Scan.**

▼ **Insert Text**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Insert Pages.** Click **Insert Text.** The **Convert Text Files to PDF** dialog box will open.

3. Determine parameters as detailed **here.** 560

4. Click **OK.**

▼ **Launch Documents in an Alternative Program**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Launch.** A list of detected applications will be displayed.

3. Click the desired application. See **here** [289] for customizable options that relate to this feature. Please note that the **Launch Toolbar** [482] can also be used to achieve this operation.

▼ **Measure Document Areas**

1. Click **Tools** in the **Menu Toolbar.** [306]

2. Hover over **Measuring Tools.**

3. Click **Area Tool.** The pointer will become a crosshairs icon.

4. Follow the instructions detailed **here.** [731]

▼ **Measure Document Distances**

1. Click **Tools** in the **Menu Toolbar.** [306]

2. Hover over **Measuring Tools.**

3. Click **Distance Tool.** The pointer will become a crosshairs icon.

4. Follow the instructions detailed **here.** [725]

▼ **Measure Document Perimeters**

1. Click **Tools** in the **Menu Toolbar.** [306]

2. Hover over **Measuring Tools.**

3. Click **Perimeter Tool.** The pointer will become a crosshairs icon.

4. Follow the instructions detailed **here.** [728]

▼ **Move All Open Documents to a Single Tab Group**

1. Click **Window** in the **Menu Toolbar.** [306]

2. Click **All Documents to One Tab Group.**

▼ **Move the Active Document to a New Horizontal Tab Group**

1. Click **Window** in the **Menu Toolbar.** ³⁰⁶

2. Click **Active Document to New Horizontal Tab Group.**

▼ **Move the Active Document to a New Vertical Tab Group**

1. Click **Window** in the **Menu Toolbar.** ³⁰⁶

2. Click **Active Document to a New Vertical Tab Group.**

▼ **Number Pages**

1. Click **Document** in the **Menu Toolbar.** ³⁰⁶

2. Click **Number Pages.** The **Page Numbering** dialog box will open.

3. Determine parameters as detailed **here.** ⁵⁸⁵

4. Click **OK.**

▼ **OCR Pages**

The optical character recognition (OCR) in **PDF-XChange Editor** analyzes PDF documents, recognizes text and then makes it selectable and searchable. Follow the instructions below to perform OCR on documents:

1. Click **Document** in the **Menu Toolbar.** ³⁰⁶

2. Click **OCR Pages.** The **OCR Pages** dialog box will open.

3. Determine parameters as detailed **here.** ⁵⁹⁴

4. Click **OK.**

▼ **Place Signatures in Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Place Signature.**

4. Follow the instructions detailed **here.** 597

▼ **Read Selected Text Out Loud**

1. Click the **Select Text Tool** icon in the **Standard Toolbar.** 310

2. Highlight the text to be read out loud.

3. Right-click the selected text and click **Read Out Loud Selected Text** in the submenu. See **here** 295 for customizable options that relate to this feature.

▼ **Redact Page Content**

Redaction can be used to remove content permanently from documents. Redaction is used, instead of a delete option, when it is necessary/desired to show that material has been removed from documents, such as in sensitive material where some content can be shown to all users but other content needs to be protected. Follow the instructions below to redact page content:

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Redaction.**

3. Click **Mark for Redaction.**

4. Follow the instructions detailed **here.** 603

▼ **Remove Backgrounds from Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Background.**

3. Click **Remove All.** The **Remove Backgrounds** dialog box will open.

4. Click **Yes.**

▾ **Remove Bates Numbering from Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Bates Numbering.**

3. Click **Remove All.** The **Remove Bates Numberings** dialog box will open.

4. Click **Yes.**

▾ **Remove Cropped Content From Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Crop Pages.**

3. Click **Remove Cropped Content.**

▾ **Remove Headers and Footers from Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Header and Footer.**

3. Click **Remove All.** The **Remove Headers and Footers** dialog box will open.

4. Click **Yes.**

▾ **Remove Watermarks from Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Watermarks.**

3. Click **Remove All.** The **Remove Watermarks** dialog box will open.

4. Click **Yes**.

▼ **Reopen Recently Closed Documents**

1. Click **Window** in the **Menu Toolbar.** 306

2. Click **Reopen Recently Closed Document.**

The keyboard shortcut for this operation is Ctrl+Shift+W.

▼ **Reorder Pages**

1. Click **View** in the **Menu Toolbar.** 306

2. Click **Thumbnails.** The **Thumbnails** pane will open and display the pages of the active document.

3. Click and drag pages within the pane to reorder them in the active document.

▼ **Replace Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Replace Pages.** The **Replace Pages** dialog box will open.

3. Determine parameters as detailed **here.** 568

4. Click **OK.**

▼ **Resize Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Resize Pages.** The **Resize Pages** dialog box will open.

3. Determine parameters as detailed **here.** 582

4. Click **OK.**

▼ **Rotate Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Rotate Pages.**

3. The **Rotate Pages** dialog box will open.

4. Determine parameters as detailed **here.** 582

5. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+R.

▼ **Select Document Text**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Basic Tools.**

3. Select **Select Text Tool.**

4. Click and drag to select text. See **here** 640 for further information.

▼ **Sign Documents**

Digital signatures are used to demonstrate the authenticity of documents and increase their security. Follow the instructions below sign documents:

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Sign Document.**

4. Follow the instructions detailed **here.** 597

▼ **Split Document Pages**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Split Pages.** The **Split Pages** dialog box will open.

3. Determine parameters as detailed **here.** 591

4. Click **OK.**

▼ **Split Documents**

1. Click **Document** in the **Menu Toolbar.** 306

2. Click **Split Document.** The **Split Document** dialog box will open.

3. Determine parameters as detailed **here.** 566

4. Click **OK.**

▼ **Split the Active Document View into Two Horizontal Sections**

1. Click **Window** in the **Menu Toolbar.** 306

2. Hover over **Split.**

3. Click **Horizontal Split.**

▼ **Split the Active Document View into Two Vertical Sections**

1. Click **Window** in the **Menu Toolbar.** 306

2. Hover over **Split.**

3. Click **Vertical Split.**

▼ **Strikeout Document Text**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Select **Strikeout Text Tool.**

4. Click and drag to strikeout text. See **here** 680 for further information.

The keyboard shortcut for this operation is Ctrl+Shift+S.

▼ **TimeStamp Documents**

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. Follow the instructions below to timestamp documents:

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Timestamp.**

4. Follow the instructions detailed **here.** 599

▼ **Underline Document Text**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Comment and Markup Tools.**

3. Select **Underline Text Tool.**

4. Click and drag to underline text. See **here** 683 for further information.

The keyboard shortcut for this operation is Ctrl+U.

▼ **Validate Document Signatures**

This feature makes it possible for signatures to be validated when the documents that contain them are received. Please note that, depending on the default settings of the local computer

where the files are received, this process may take place automatically. Follow the instructions below to validate document signatures:

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **Digital Signatures.**

3. Click **Validate All Signatures.**

▼ **Zoom to Actual Document Size**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Actual Size.**

The keyboard shortcut for this operation is Ctrl+1.

▼ **Zoom to a Custom Magnification Level**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Zoom.**

3. Click **Zoom To.** The **Zoom To** dialog box will open.

4. Enter the desired magnification level, or select a preset value from the dropdown menu.

5. Click **OK.**

The keyboard shortcut for this operation is Ctrl+Shift+M.

Additionally, see the **Forms Guide** 121 for further elements that can be added to documents, including check boxes, buttons, digital signatures, dropdown menus, list boxes, radio buttons and text fields.

The **Keyboard Shortcuts** 814 section contains several useful editing shortcuts.

5.3.3   Open Documents

Open Documents

There are multiple ways to open documents in **PDF-XChange Editor.** See below for instructions on how to:

    ▼ **Open Documents Located at a URL**

        1. Click **File** in the **Menu Toolbar.** 306

        2. Hover over **Open From.**

        3. Select **URL.** The **Open a Web Link** dialog box will open.

        4. Enter the desired URL in the text box and click **OK.**

    ▼ **Open Documents Located in a Dropbox Folder**

        1. Click **File** in the **Menu Toolbar.** 306

        2. Hover over **Open From.**

        3. Select **Dropbox.** The **Authenticate** dialog box will open.

        4. Enter the login details of the **Dropbox** account and click **Sign in.** The **Open File** dialog box will open.

        5. Select the desired file and click **Open.**

    ▼ **Open Documents Located in a SharePoint Account**

        1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Open From.**

3. Select **Sharepoint.** The **Open File** dialog box will open.

4. Enter the address of the file in the indicated text box and click **Navigate.**

5. Select the desired file and click **Open.**

▼ **Open Documents Located on a Google Drive**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Open From.**

3. Select **Google Drive.** The **Google Drive Authentication** dialog box will open.

4. Enter the login details of the **Google** account and click **Sign in.**

▼ **Open Documents Located on the Local Computer**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Open From.**

3. Select **My Computer.** The **Open Files** dialog box will open.

4. Select the desired file and click **Open.**

The keyboard shortcut for this operation is Ctrl+O.

5.3.4 **Miscellaneous Document Operations**

Miscellaneous Document Operations

There are multiple further options that relate to document-level operations within **PDF-XChange Editor.** See below for instructions on how to:

▼ **Add JavaScript to Documents**

JavaScript is an object-oriented computer programming language that is used to create interactive effects within documents/web browsers. Follow the instructions below to add JavaScript to documents:

1. Click **File** in the **Menu Toolbar.** ⌐306⌐

2. Click **Document Properties.** The **Document Properties** dialog box will open.

3. Select **JavaScript** in the **Categories** menu.

4. Click the **Add** button. The **JavaScript Editor** dialog box will open.

5. Enter the new JavaScript in the text box. Enter a name for the new Javascript in the **Name** text box as desired.

6. Click **OK.** Please note that JavaScript preferences can be determined **here.** ⌐269⌐

▼ **Check for Product Updates**

1. Click **Help** in the **Menu Toolbar.** ⌐306⌐

2. Click **Check for Updates.**

▼ **Close All Active Documents**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Close All.**

▼ Close Documents

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Close.** Alternatively, click the cross located at the top-right of the document name as it is displayed in the tab beneath the **Properties Toolbar.** 484

▼ Convert Documents to a Different Format

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save As.** The **Save File As** dialog box will open.

3. Use the **Save as type** dropdown menu to select the desired format. The options are:

- **PDF Documents (*.pdf)**
- **Plain Text (*.txt)**
- **MS PowerPoint Presentation (*.pptx)**
- **MW Word Document (*.docx)**
- **MS Excel Workbook (*.xlsx)**
- **PDF/A Document (*.pdf)**
- **PDF/X Document (*.pdf)**

4. Click **Save.**

▼ Convert Named Destinations into Regular Destinations

Named destinations are specific, user-defined locations within documents. They operate in a similar manner to bookmarks. Follow the instructions below to convert named destinations into regular destinations. See **here** 503 for further information on named destinations.

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Convert Named Destinations To Regular Destinations.**

4. Follow the instructions detailed **here.** 774

▼ Convert Text into Named Destinations

Named destinations are specific, user-defined locations within documents. They operate in a similar manner to bookmarks. Follow the instructions below to convert specific document text into named destinations. All instances of the specified text will be turned into a separate named destination. See **here** 503 for further information on named destinations.

1. Click **Advanced** in the **Menu Toolbar.** 306

2. Hover over **Bookmarks.**

3. Click **Convert to Named Destinations.**

4. Follow the instructions detailed **here.** 773

▼ Copy the Full File Name of Documents

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Copy Full File Name.**

▼ Create Named Destinations

Named destinations are specific, user-defined locations within documents. They operate in a similar manner to bookmarks. Follow the instructions below to create named destinations.

1. Move to the desired new named destination location.

2. Click **View** in the **Menu Toolbar.** 306

3. Hover over **Other Panes.**

3. Click **Destinations.** The **Named Destinations** pane will open.

4. Click the **New Destination** button. A new entry will appear in the **Named Destinations** pane. See **here** 503 for further information.

▼ **Create JavaScript Links**

1. Click **Tools** in the **Menu Toolbar,** 306 then hover over **Link Tools** and click **Link Creation Tool.**

2. Click and drag the pointer to determine the size and location of the link. The **Browse for Link Target** dialog box will open:
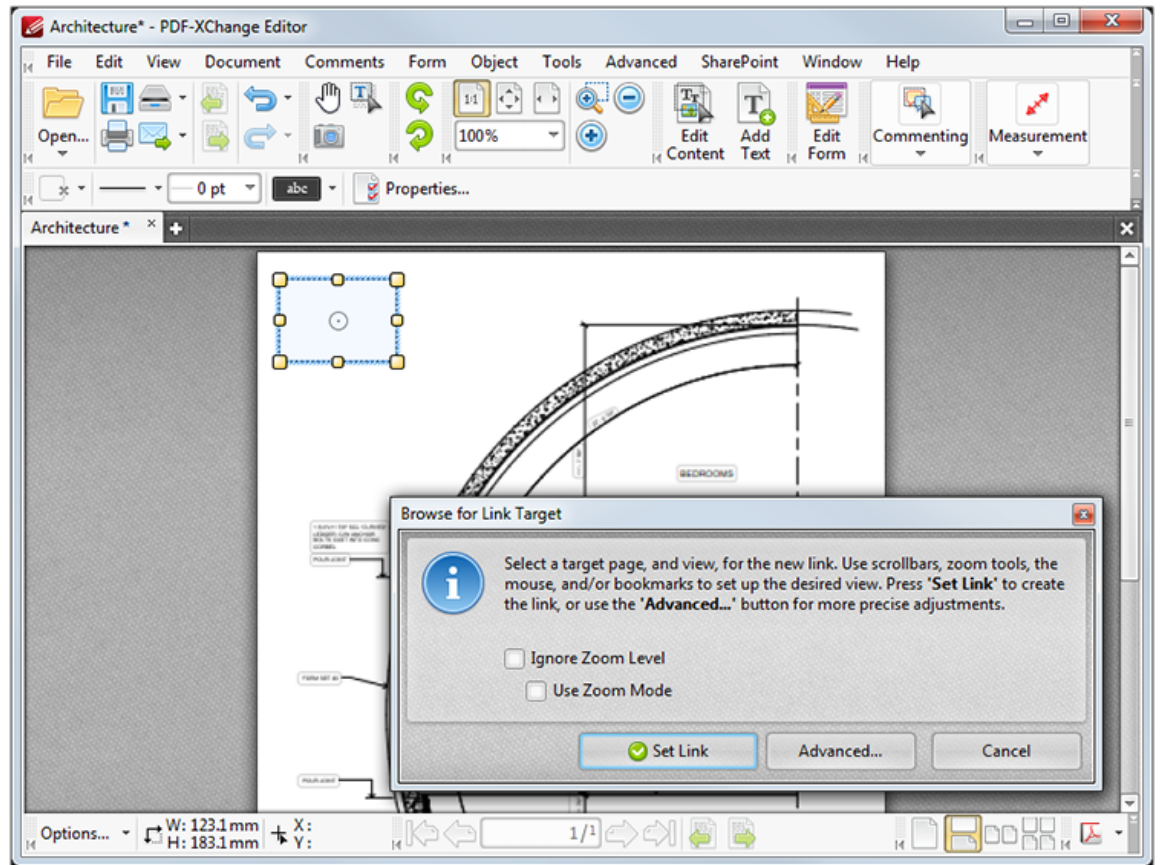
3. Click **Advanced.** The **Edit Action List** dialog box will open and the **Add** dropdown menu will be expanded:
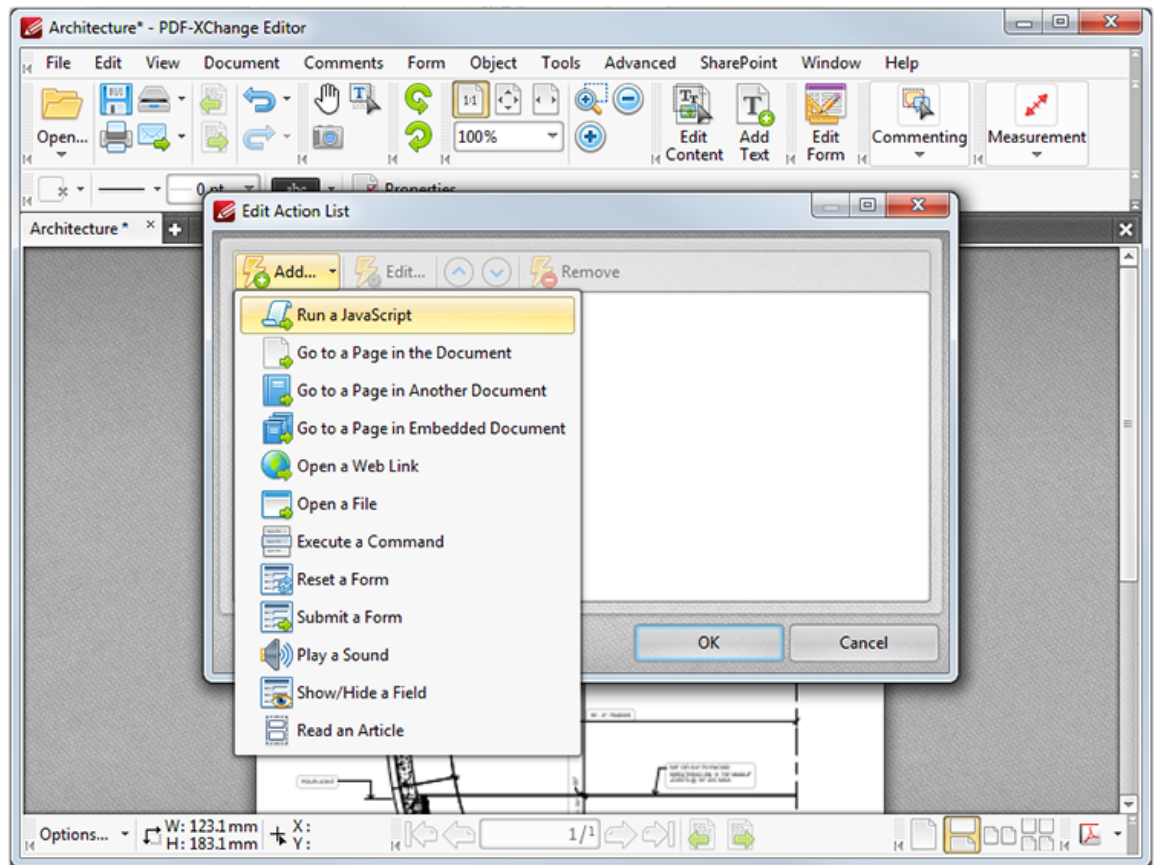
4. Click **Run a JavaScript.** The **Add Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript and click **OK** to create the JavaScript link.

▼ Delete JavaScript

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Document Properties.** the **Document Properties** dialog box will open.

3. Click **JavaScript** in the **Categories** menu.

4. Select the desired JavaScript and click **Delete.** A confirmation dialog box will appear.

5. Click **Yes.**

▼ Duplicate Document Pages

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **More for Pages.**

3. Click **Duplicate Pages.** The **Duplicate Pages** dialog box will open.

4. Follow the instructions detailed **here.** ⌐581⌐

Edit JavaScript

1. Click **File** in the **Menu Toolbar.** ⌐306⌐

2. Click **Document Properties.** The **Document Properties** dialog box will open.

3. Click **JavaScript** in the **Categories** menu.

4. Select the desired JavaScript and click **Edit.** The **JavaScript Editor** dialog box will open.

5. Edit the JavaScript as desired and click **OK** to save.

The keyboard shortcut for this operation is Ctrl+J.

Email Documents

This feature emails documents directly from **PDF-XChange Editor.** It uses the mailing parameters defined in the **Send Mail** section of the **Preferences** settings, which can be determined **here.** ⌐285⌐ Follow the instructions below to email documents:

1. Click **File** in the **Menu Toolbar.** ⌐306⌐

2. Click **Send by E-mail.** The **Send Mail** dialog box will open.

3. Follow the instructions detailed **here.** ⌐190⌐

Export Settings

This feature makes it possible to save and export customized settings for subsequent use:

1. Click **Edit** in the **Menu Toolbar.** ⌐306⌐

2. Click **Export Settings.** The **Export Settings Options** dialog box will open.

3. Determine parameters as detailed **here.** 226

4. Click **OK.** Use the **Import Settings** 227 feature to import saved settings.

▼ **Find Text**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Find.** The **Find Function** will launch:

Figure 1. Find Function

3. Follow the instructions detailed **here.** 217

The keyboard shortcut for this operation is Ctrl+F.

▼ **Open the Containing Folder of Documents**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Open Containing Folder.**

▼ **Import Saved Settings**

This feature is used to import customized settings that have been saved using the **Export Settings** 226 feature. Follow the instructions below to import settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Import Settings.** The **Import Settings from File** dialog box will open.

3. Follow the instructions detailed **here.** 227

4. Select the desired settings for import and click **OK.**

▼ **Launch JavaScript Console**

The **JavaScript Console** is used to add, edit and remove JavaScript from documents. Follow the instructions below to launch the **JavaScript Console:**

   1. Click **View** in the **Menu Toolbar.** 306

   2. Hover over **Show.**

   3. Click **Show JavaScript Console.** See **here** 526 for further information on the **JavaScript Console.**

The keyboard shortcut for this operation is Ctrl+J.

▼ **Print Documents**

   1. Click **File** in the **Menu Toolbar.** 306

   2. Click **Print.** The **Print** dialog box will open. Set the desired printing parameters as detailed **here.** 198

   3. Click **Print.**

The keyboard shortcut for this operation is Ctrl+P.

▼ **Print Snapshots**

   1. Take a snapshot as detailed **here.** 638

   2. Click **File** in the **Menu Toolbar.** 306

   3. Click **Print.** The **Print** dialog box will open.

   4. Select **Selected Graphic** in the **Page Range Section,** and **Fit to Printer Margins** and **Auto-Center Page on Paper** in the **Page Placement and Scaling** section:
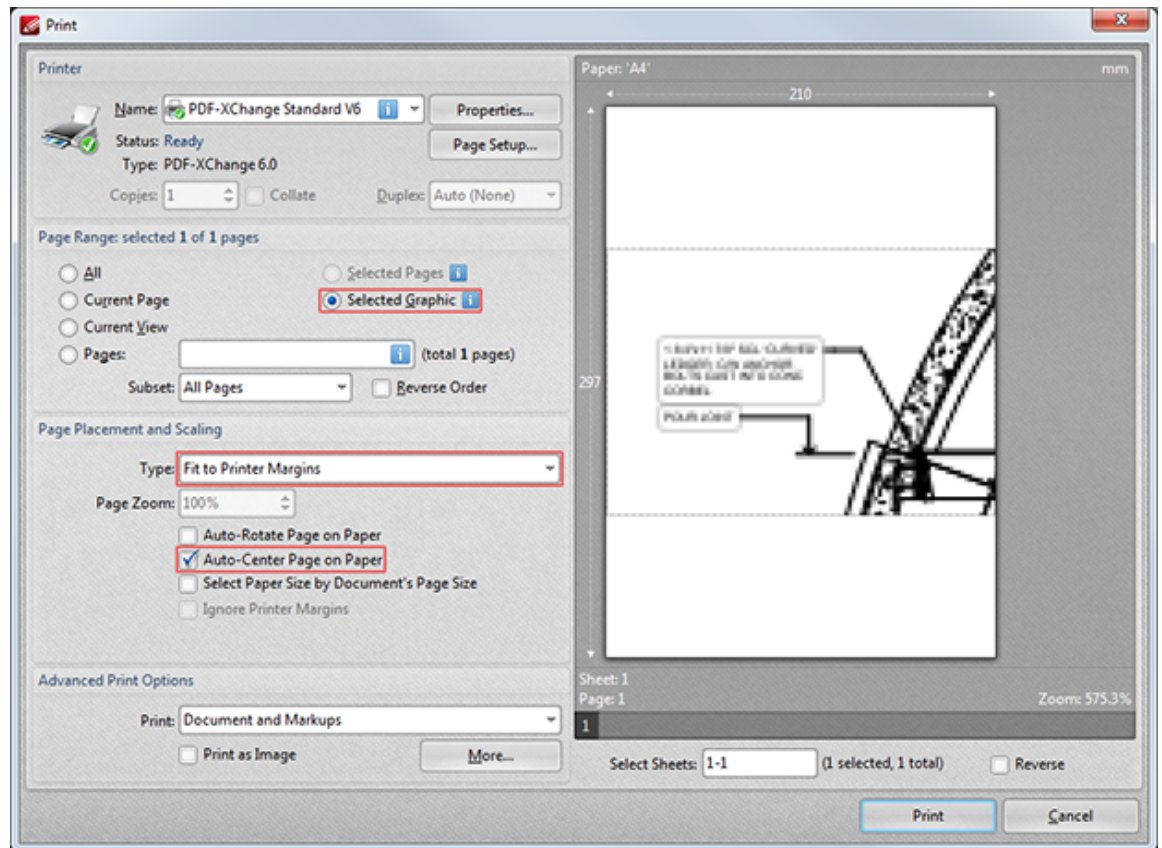
5. Click **Print.**

▼ **Print the Current View**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Print.** The **Print** dialog box will open.

3. Select **Current View** in the **Page Range Section,** and **Fit to Printer Margins** and **Auto-Center Page on Paper** in the **Page Placement and Scaling** section:
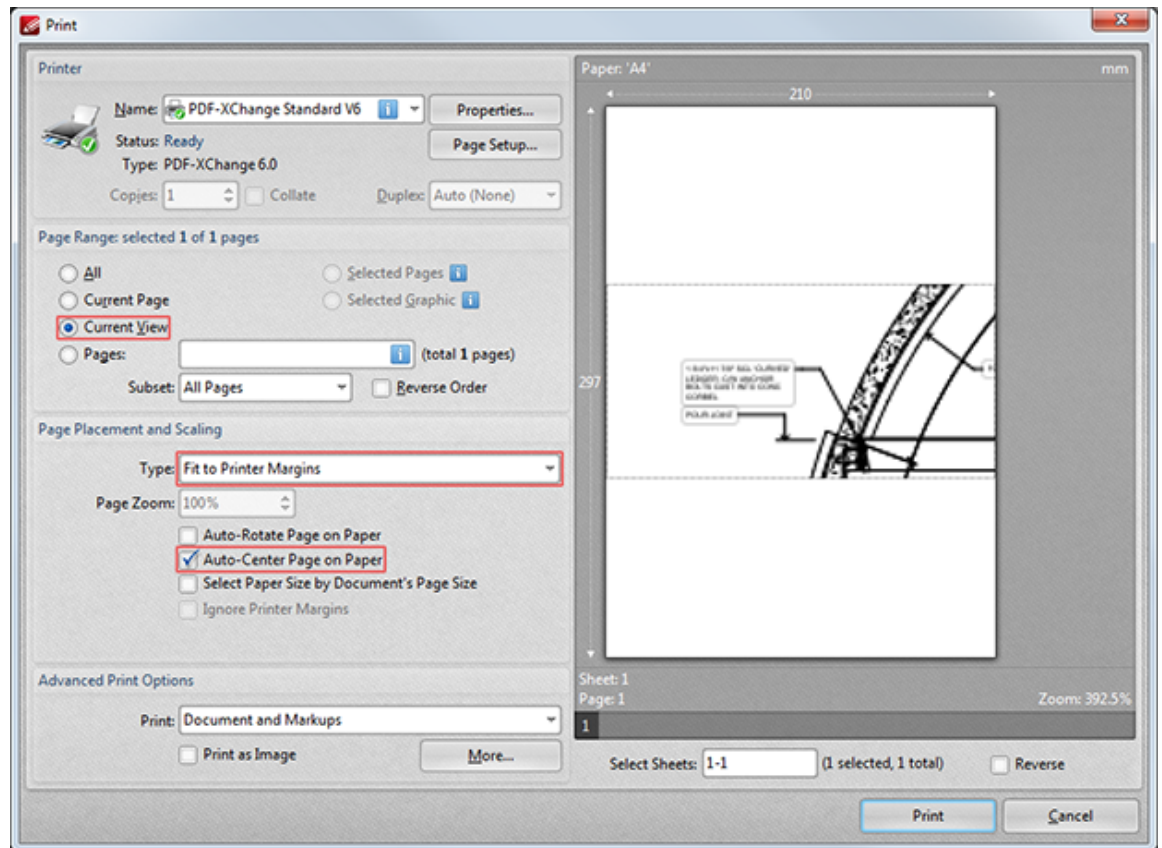
4. Click **Print.**

Reset Document Settings

This feature resets document settings as desired. Settings that can be reset are program options, including common options, presets, trusted/untrusted lists, prompts and the UI language, as well as the program history, custom stamp collections and digital signature appearance templates. Follow the instructions below to reset document settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Reset Settings.** The **Reset Settings Options** dialog box will open.

3. Follow the instructions detailed **here.** 228

Revert Documents to Original State

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Revert.**

▼ Search for Text in Documents/Folders

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Search.** The **Search** pane will open.

3. Follow the instructions detailed **here.** 219

The keyboard shortcut to launch the **Search** pane is Ctrl+Alt+F.

▼ Swap Document Pages

1. Click **Document** in the **Menu Toolbar.** 306

2. Hover over **More for Pages.**

3. Click **Swap Pages.** The **Swap Pages** dialog box will open.

4. Enter the page numbers of the pages to be swapped and click **OK.**

▼ Take Document Snapshots

The **Snapshot Tool** is a quick and efficient method of creating images of the current view within **PDF-XChange Editor** and pasting them immediately to the clipboard of the local computer. Follow the instructions below to enable and use the **Snapshot Tool:**

1. Click **Tools** in the **Menu Toolbar.** 306

2. Hover over **Basic Tools.**

3. Click **Snapshot Tool.**

4. Follow the instructions detailed **here.** 638

▼ Utilize Sessions

The **Sessions** options within **PDF-XChange Editor** provide a useful method of retaining the parameters of the active session for subsequent use. The retained parameters include which documents were open, their order/layout within the main window, the location of the main window on the screen and the status of editing panes such as the **Thumbnails/Properties** pane. Follow the instructions below to:

▼ **Save the Current Session**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Sessions.**

3. Click **Save Current Session.** The **Save Current Session** dialog box will open:

Figure 5. Save Current Session Dialog Box

4. Enter a name for the session in the text box and click **OK.** See **here** 154 for further information.

▼ **Save the Current Session to a File**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Sessions.**

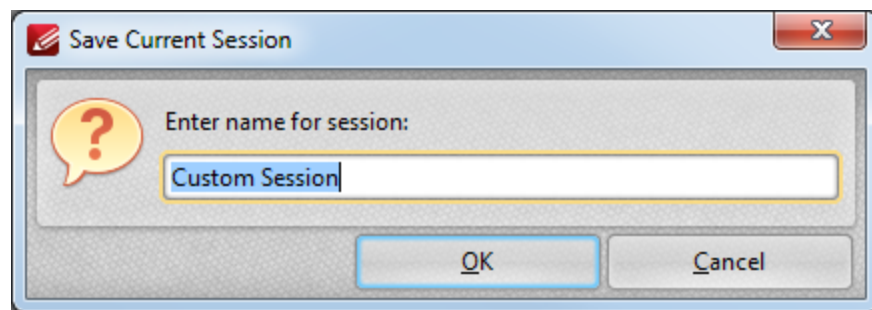3. Click **Save Current Session to a File.** The **Save Current Session** dialog box will open.

4. Enter a name for the session in the **File name** text box and click **Save.** See **here** 154 for further information.

▼ **Open a Session From a File**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Sessions.**

3. Click **Open Session from a File.** The **Open Session** dialog box will open.

4. Select the desired session and click **Open.** See **here** 154 for further information.

▼ **Manage Existing Sessions**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Sessions.**

3. Click **Manage Sessions.** The **Manage Sessions** dialog box will open.

4. Follow the instructions detailed **here.** 154

▼ **View Document Font Details**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Document Properties.** The **Document Properties** dialog box will open.

3. Click **Fonts** in the **Categories Menu.** A list of fonts used in the active document will be displayed. Please note that this information is read-only. See **here** 158 for instructions on how to customize font embedding options.

5.3.5 Save Documents

Save Documents

There are multiple ways to save documents in **PDF-XChange Editor.** See below for instructions on how to:

▼ **Save Copies of the Active Document**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save Copy As.** The **Save Copy As** dialog box will open.

3. Enter a file name in the **File name** text box. When this option is used to save documents, **PDF-XChange Editor** inserts the word **'Copy'** after the existing name as the default new file name.

4. Click **Save.**

▼ **Save All Open Documents**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save All.**

▼ **Save Optimized Copies of the Active Document**

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save as Optimized.** The **Optimize PDF** dialog box will open. Select the desired optimization parameters, as detailed **here,** 158 and click **OK.** The document will then be optimized and the **Save File** dialog box will open.

3. Enter a file name in the **File name** text box. When this option is used to save documents, **PDF-XChange Editor** inserts the word **'Optimized'** after the existing name as the default new file name.

4. Click **Save.**

▼ Save Documents

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save.**

The keyboard shortcut for this operation is Ctrl+S.

▼ Save Documents with a New Name/to a New Location

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Save As.** The **Save File As** dialog box will open.

3. Move to the location and/or enter a new file name in the **File name** text box.

4. Click **Save.**

The keyboard shortcut for this operation is Ctrl+Shift+S.

▼ Save to a Dropbox Folder

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Save To.**

3. Click **Dropbox.** The **Authenticate** dialog box will open. Enter the details of the associated **Dropbox** account and click **Sign in**. The **Save File** dialog box will open.

4. Enter a file name in the **File Name** text box and click **Save.**

▼ Save to a Google Drive

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Save To.**

3. Click **Google Drive.** The **Google Drive Authentication** dialog box will open. If you agree with the terms then click **Allow.** The **Save File to Google Drive** dialog box will open.

4. Enter a file name in the **File Name** text box and click **Save.**

▼ **Save to a SharePoint Account**

1. Click **File** in the **Menu Toolbar.** 306

2. Hover over **Save To.**

3. Click **SharePoint.** The **Save File** dialog box will open.

4. Enter the **SharePoint** address in the text box. Click **Navigate.**

5. Select a location from the list.

6. Click **Save.**

5.4   Editing Panes Guide

![PDF icon]**Editing Panes Guide**

There are ten editing panes in **PDF-XChange Editor** that enable the efficient browsing and editing of documents. Click the links below for instructions on how to open and utilize:

▼ **The Bookmarks Pane**

1. Click **View** in the **Menu Toolbar.** ⌐306¬

2. Click **Bookmarks.** The **Bookmarks** pane will open.

3. Follow the instructions detailed **here.** ⌐493¬

The keyboard shortcut to show/hide the **Bookmarks** pane is Ctrl+B.

▼ **The Thumbnails Pane**

1. Click **View** in the **Menu Toolbar.** ⌐306¬

2. Click **Thumbnails.** The **Thumbnails** pane will open.

3. Follow the instructions detailed **here.** ⌐497¬

The keyboard shortcut to show/hide the **Thumbnails pane** is Ctrl+T.

▼ **The Named Destinations Pane**

1. Click **View** in the **Menu Toolbar.** ⌐306¬

2. Hover over **Other Panes.**

3. Click **Destinations.**

4. Follow the instructions detailed **here.** 503

▼ **The Content Pane**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.**

3. Click **Content.**

4. Follow the instructions detailed **here.** 505

▼ **The Signatures Pane**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.**

3. Click **Signatures.**

4. Follow the instructions detailed **here.** 508

▼ **The Layers Pane**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.**

3. Click **Layers.**

4. Follow the instructions detailed **here.** 511

The keyboard shortcut to show/hide the **Layers pane** is Ctrl+L.

▼ **The Comments Pane**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.**

3. Click **Comments.**

4. Follow the instructions detailed **here.** [514]

The keyboard shortcut to show/hide the **Comments** pane is Ctrl+M.

▼ The Attachments Pane

1. Click **View** in the **Menu Toolbar.** [306]

2. Hover over **Other Panes.**

3. Click **Attachments.**

4. Follow the instructions detailed **here.** [517]

The keyboard shortcut to show/hide the **Attachments** pane is Ctrl+Shift+B.

▼ The Fields Pane

1. Click **View** in the **Menu Toolbar.** [306]

2. Hover over **Other Panes.**

3. Click **Fields.**

4. Follow the instructions detailed **here.** [519]

The keyboard shortcut to show/hide the **Fields** pane is Ctrl+I.

▼ The Properties Pane

1. Click **View** in the **Menu Toolbar.** [306]

2. Hover over **Other Panes.**

3. Click **Properties.**

4. Follow the instructions detailed **here.** 224

The keyboard shortcut to show/hide the **Properties** pane is Ctrl+'.

Additionally, please note that the tabs detailed below can be used to minimize/maximise editing panes:
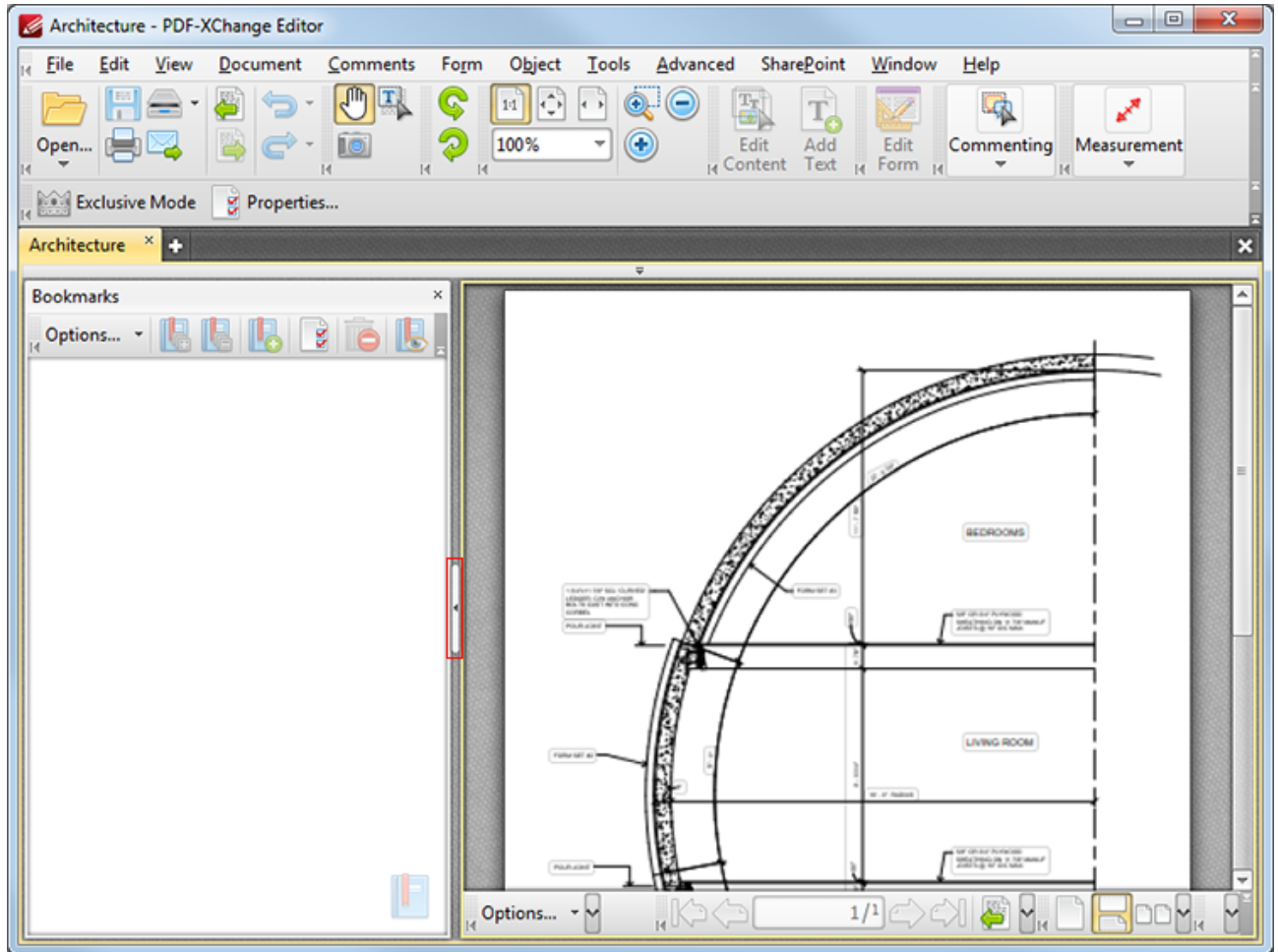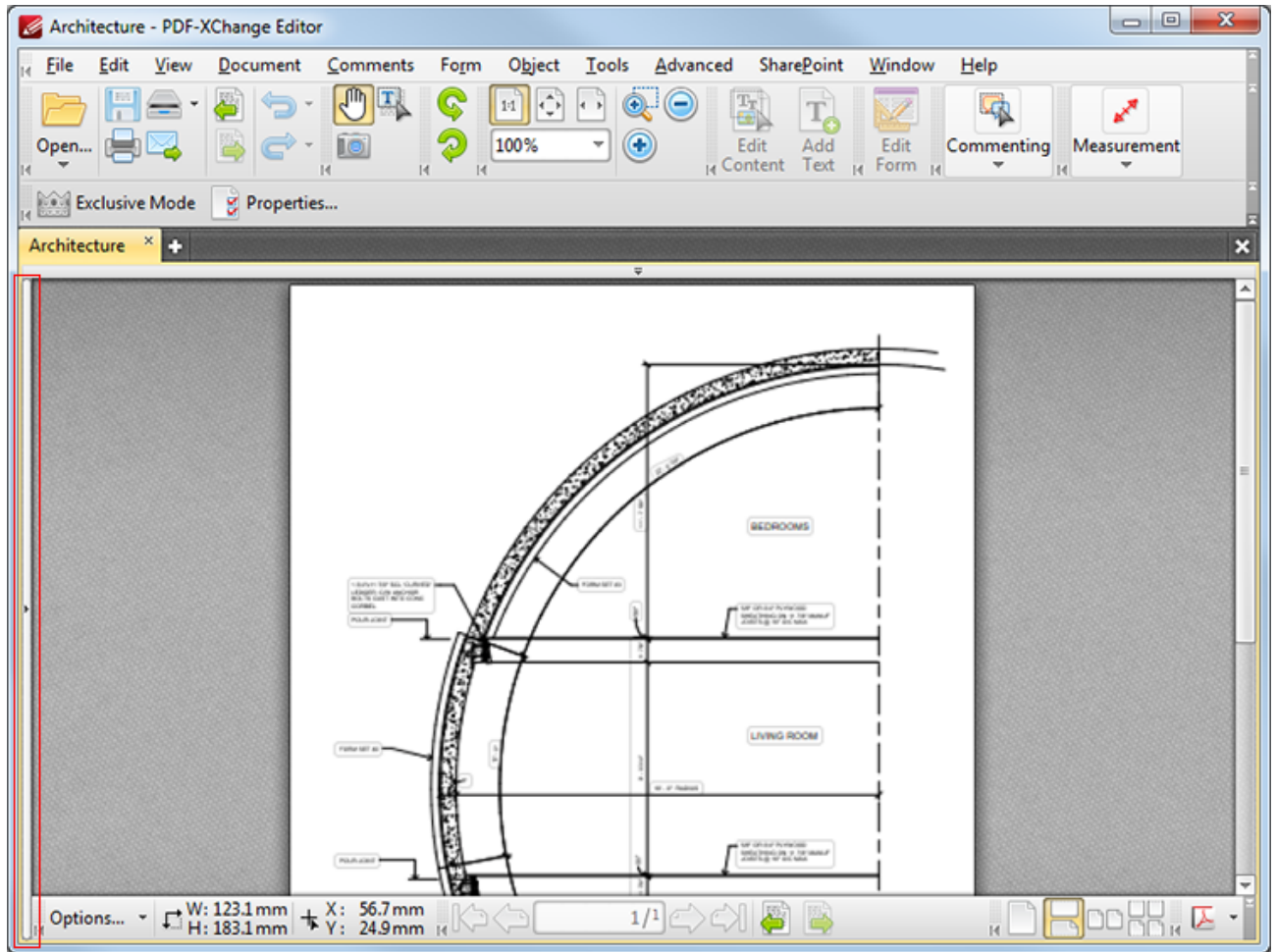

Figure 1. Minimise Pane Tab

Figure 2. Maximise Pane Tab

5.5 Forms Guide

Forms Guide

PDF-XChange Editor includes functionality that can be used to add fillable forms to documents. Fillable forms can be used to create dynamic documents such as those used to make credit card payments and create website accounts. Please note that this is a licensed feature. Therefore, unless **PDF-XChange Editor Plus** is used, documents will feature watermarks when fillable forms are created. See below for instructions on how to:

▼ **Add Barcodes to Documents**

Barcodes translate form data into an encoded pattern to increase security and efficiency. They are compatible with most smartphones and tablets and have several useful templates, such as electronic business cards that can be used for contact details and other personal information. They can also be used to link to URLs, create custom messages and send automatic emails. Follow the steps below to add barcodes to documents:

1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Barcode** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the barcode.

3. Place the rectangle at the desired location and click to create the barcode. See **here** 455 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance barcodes.

▼ **Add Buttons to Documents**

Buttons are used to enable specific operations within documents, such as opening a web link or playing a sound. The operations are carried out when buttons are clicked. Follow the instructions below to add buttons to documents:

1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Button** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the button.

3. Place the rectangle at the desired location and click to create the button. See **here** 420 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance buttons.

▼ Add Check Boxes to Documents

Check boxes allow users to make a binary choice between mutually exclusive options, such as yes/no answers. Follow the instructions below to add check boxes to documents:

1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Check Box** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue square that represents the check box.

3. Place the square at the desired location and click to create the check box. See **here** 348 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance check boxes.

▼ Add Digital Signature Fields to Documents

Digital signatures are used to demonstrate the authenticity of documents and increase their security. Follow the instructions below to add digital signature fields to documents:

1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Digital Signature** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the digital signature field.

3. Place the rectangle at the desired location and click to create the digital signature field. See **here** 437 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance digital signatures.

▼ **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. The option selected is displayed within the dropdown menu. Follow the instructions below to add dropdown menus to documents:

    1. Click **Edit Form** in the **Shortcut Toolbar.** 42

    2. Click the **Dropdown** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the dropdown menu.

    3. Place the rectangle at the desired location and click to create dropdown menu. See **here** 386 for further options.

    4. Use the editing options detailed **here** 320 to edit and enhance dropdown menus.

▼ **Add List Boxes 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. The option selected is displayed within the list box. Follow the instructions below to add list boxes to documents:

    1. Click **Edit Form** in the **Shortcut Toolbar.** 42

    2. Click the **List Box** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the list box.

    3. Place the rectangle at the desired location and click to create the list box. See **here** 374 for further options.

    4. Use the editing options detailed **here** 320 to edit and enhance list boxes.

▼ **Add Radio Buttons to Documents**

Radio buttons are used within fillable forms to denote options that are mutually exclusive, such as answers to multiple-choice questions. Follow the instructions below to add radio buttons to documents:

    1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Radio Button** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue square that represents the radio button.

3. Place the square at the desired location and click to create the radio button. See **here** 361 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance radio buttons.

▼ **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. Follow the instructions below to add text fields to documents:

1. Click **Edit Form** in the **Shortcut Toolbar.** 42

2. Click the **Text Field** button in the **Properties Toolbar.** The pointer will turn into a crosshairs and feature a blue rectangle that represents the text field.

3. Place the rectangle at the desired location and click to create the text field. See **here** 326 for further options.

4. Use the editing options detailed **here** 320 to edit and enhance text fields.

▼ **Change the Tab Order of Forms**

When fillable forms have been created, it is sometimes required to change the order in which the Tab key will move through forms. Follow the instructions below to change the Tab order of document forms:

1. Click **View** in the **Menu Toolbar.** 306

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.

▼ **Rename Forms**

1. Select the form.

2. Press F2. The **Rename Field** dialog box will open.

3. Enter the new name in the text box.

4. Click **OK.**

▼ **Use Forms to Calculate Values**

PDF-XChange Editor includes functionality that can be used to carry out calculations on values entered into forms. Follow the instructions below to calculate values based on the information entered into document forms:

1. Place either a **Text Field** or a **Drop Down** form in the active document.

2. Right-click the form and select **Properties.** The **Properties** pane will open.

3. Move to the **Format Value** tab and set the **Category** to **Number.**

4. Move to the **Value Calculation** tab and select the desired calculation. See **here** 339 for information on available calculations. After a calculation is selected the **Fields** option will appear in the **Value Calculation** tab.

5. Click the ellipsis icon on the right of the **Fields** option. The **Field Selection** dialog box will open.

6. Select the fields to be included in the calculation and click **OK.** The document will then update with the desired calculations in place.

▼ **Use Forms to Validate Values**

PDF-XChange Editor includes functionality that can be used to validate figures entered into forms. Follow the instructions below to validate that values entered into document forms fall within a designated range:

1. Place either a **Text Field** or a **Drop Down** form in the active document.

2. Right-click the form and select **Properties.** The **Properties** pane will open.

3. Move to the **Format Value** tab and set the **Category** to **Number.**

4. Move to the **Value Validation** tab and select **Value in Range.** The **From** and **To** options will appear in the **Value Validation** tab.

5. Use the **From** and **To** options to determine the desired range.

Additionally, several of the **Keyboard Shortcuts** 814 relate to forms.

5.6   Workspace Guide

Workspace Guide

Detailed in this section are operations in **PDF-XChange Editor** that relate to the workspace. Click the subsection titles to open the associated page of the manual:

 Customize the Workspace 128 - a breakdown of operations that relate to the customization of the workspace, including how to create customized toolbars, determine preferences, avail of editing aids and set file open security.

 Navigate the Workspace 143 - a breakdown of operations that relate to navigating between documents and document pages.

5.6.1   **Customize the Workspace**

Customize the Workspace

PDF-XChange Editor features multiple settings that enable the customization of the workspace. See below for instructions on how to:

▼ **Add/Remove Serial Keys**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Registration** in the **Categories** menu.

4. Follow the instructions detailed **here.** 255

▼ **Create Customized Toolbars**

Users of **PDF-XChange Editor** often use the same set of commands, tools and operations repeatedly. If that is the case then it is useful to create a customized toolbar in order to group together these elements of their work process to increase efficiency and output. Follow the instructions below to create customized toolbars:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Toolbars.**

3. Click **Customize Toolbars.** The **Customize Toolbars** dialog box will open.

4. Follow the instructions detailed **here.** 486

▼ **Customize the UI Appearance**

PDF-XChange Editor can be fully-customized in order to suit the specific the needs and tastes of the user. Follow the instructions below to customize the user interface:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Customize UI** in the **Categories** menu.

4. Determine parameters as detailed **here.** 292

5. Click **OK.**

▼ **Determine Applications Available via the Launch Applications Toolbar**

The **Launch Applications Toolbar** 482 facilitates the efficient opening of documents in an alternative PDF program from **PDF-XChange Editor.** Multiple programs can be added to the **Launch Applications Toolbar** for your convenience. Follow the instructions below to add/remove programs:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Launch Applications** in the **Categories** menu.

4. Determine parameters as detailed **here.** 289

5. Click **OK.**

▼ **Determine Color Management Settings**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Color Management** in the **Categories** menu.

4. Determine parameters as detailed **here.** 245

5. Click **OK.**

▼ **Determine Color Scheme Options**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Accessibility** in the **Categories** menu.

4. Determine parameters as detailed **here.** 257

5. Click **OK.**

▼ **Determine Comment Options**

The **PDF-XChange Editor** comments feature various viewing and creation options such as to show/hide tooltips, the modification date and subject/author labels in comment pop-ups. Follow the instructions below to determine options for comments:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Commenting** in the **Categories** menu.

4. Determine parameters as detailed **here.** 275

5. Click **OK.**

▼ **Determine Digital Signature Options**

The digital signature options determine various parameters of digital signatures, including creation and appearance options, verification settings and signature template options. Follow the instructions below to view and edit available options:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Signatures** in the **Categories** menu.

4. Determine parameters as detailed **here.** 277

5. Click **OK.**

▼ **Determine Document Options**

The document options determine settings that relate to documents, such as tab and window settings, application start settings, history and recent documents management, save options and PDF-specification for new documents. Follow the instructions below to view and edit available options:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Documents** in the **Categories Menu.**

4. Determine parameters as detailed **here.** 232

5. Click **OK.**

▼ **Determine File Associations**

The file association settings can be used to determine the default application for PDF files, options for viewing files in Internet Explorer, the registration options for the NP-plugin in other browsers and the preview/thumbnail handler for PDF files. Follow the instructions below to determine file associations:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **File Associations** in the **Categories** menu.

4. Determine parameters as detailed **here.** 253

5. Click **OK.**

▼ **Determine File Formats that can be Converted to/from PDF**

    1. Click **Edit** in the **Menu Toolbar.** 306

    2. Click **Preferences.**

    3. Click **Convert to PDF** or **Convert from PDF** in the **Categories** menu.

    4. Determine parameters as detailed **here.** 259

▼ **Determine Form Settings**

Forms feature multiple settings that apply to their functionality and appearance. Follow the instructions below to view/edit form settings:

    1. Click **Edit** in the **Menu Toolbar.** 306

    2. Click **Preferences.**

    3. Click **Forms** in the **Categories** menu.

    4. Determine parameters as detailed **here.** 273

    5. Click **OK.**

▼ **Determine Identity Options for Comments and Digital Signatures**

Identity options include the user login name, actual name, title and organization details. This information is used in conjunction with comments, reviews and digital signatures. Follow the instructions below to determine identity options:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Identity** in the **Categories** menu.

4. Determine parameters as detailed **here.** 264

5. Click **OK.**

▼ **Determine JavaScript Options**

Follow the instructions below to determine options that relate to JavaScript and the **JavaScript Console:**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **JavaScript** in the **Categories** menu.

4. Determine parameters as detailed **here.** 269

5. Click **OK.**

▼ **Determine Measurement Options**

Follow the instructions below to determine measurement settings, such as the display options of rulers, grids and guides and their associated settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Measurement** in the **Categories Menu.**

4. Determine parameters as detailed **here.** 261

5. Click **OK.**

▼ **Determine Memory Usage**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Performance** in the **Categories** menu.

4. Determine **Memory** and **Threads Usage** settings as detailed **here.** 243

5. Click **OK.**

▼ **Determine Page Display Options**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Page Display** in the **Categories** menu.

4. Determine parameters as detailed **here.** 234

5. Click **OK.**

▼ **Determine Page Layout**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Page Layout.**

3. Select layout options as detailed **here.** 522

▼ **Determine Page Text Options**

Page text options include settings for action taken when **PDF-XChange Editor** detects interactive text links such as IP addresses and options for when text is copied or bookmarks are created. Follow the instructions below to determine page text options:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Page Text** in the **Categories** menu.

4. Determine parameters as detailed **here.** 237

▼ **Determine Scanner Presets**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Scanner Presets** in the **Categories** menu.

4. Determine parameters as detailed **here.** 281

5. Click **OK.**

▼ **Determine Search Provider Settings**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Search Providers** in the **Categories** menu.

4. Determine parameters as detailed **here.** 287

5. Click **OK.**

▼ **Determine Speech Options for the Read-Out-Loud Feature**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Speech** in the **Categories** menu.

4. Determine parameters as detailed **here.** 295

5. Click **OK.**

▼ **Determine Send Mail Options**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Send Mail** in the **Categories** menu.

4. Determine parameters as detailed **here.** 285

▼ **Determine the Default Tool**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Tools** in the **Categories** menu.

4. Use the **Default Tool** dropdown menu to select either the **Hand Tool** 636 or the **Select Text Tool.** 640

5. Click **OK.**

▼ **Determine Tab and Window Options**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Documents** in the **Categories** menu.

4. Click **Setup.** The **Manage Tabs and Windows** dialog box will open.

5. Determine parameters as detailed **here.** 232

6. Click **OK.**

▼ Determine the UI Language

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Languages** in the **Categories** menu.

4. Select the desired language and click **OK.** See **here** 247 for further information.

▼ Determine the Default Document Layout

1. Click **File** in the **Menu Toolbar.** 306

2. Click **Document Properties.**

3. Click **Initial View** in the **Categories** menu.

4. Determine parameters as detailed **here.** 209

5. Click **OK.**

▼ Determine Visible Toolbars

1. Click **View** in the **Menu Toolbar.** 306

2. Click **Toolbars.** A list of toolbars will be displayed.

3. Select/clear toolbar boxes to show/hide them in the UI.

▼ Display/Hide Guides

Guides are used to simplify and make more exact the process of aligning text and objects. Follow the instructions below to enables guides:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Show.**

3. Click **Show Guides.** See **here** 525 for further information.

The keyboard shortcut for this operation is Ctrl+;.

▼ Display/Hide Measurement Grids

Measurement grids are used to assist in the accurate alignment of text and objects. Follow the instructions below to enable a measurement grid:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Show.**

3. Click **Show Grid.** See **here** 525 for further information.

The keyboard shortcut for this operation is Ctrl+'.

▼ Display/Hide Page Measurement Information

Page measurement information is included to enable precise document editing. When it is enabled the coordinates of the pointer are displayed next to the **Document Options Toolbar.** 475 Follow the instructions below to enable page measurement information:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Show.**

3. Click **Show Page Measurement Info.** See **here** 525 for further information.

▼ Display/Hide Rulers

Rulers enable the precise measurement of document objects. Follow the instructions below to display rulers:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Show.**

3. Click **Show Rulers.** See **here** ⁵²⁵ for further information.

The keyboard shortcut for this operation is Ctrl+R.

▼ **Enable/Disable Plugins**

PDF-XChange Editor features various plugins that heighten the functionality of the software, such as the **Dropbox** plugin, which makes it possible to work with files located in a **Dropbox** folder, and the OCR plugin, which makes the OCR process possible. Follow the instructions below to view/enable/disable plugins:

1. Click **Edit** in the **Menu Toolbar.** ³⁰⁶

2. Click **Preferences.**

3. Click **Plugins.**

4. Determine parameters as detailed **here.** ²⁸³

5. Click **OK.**

▼ **Enable Full Screen Mode**

1. Click **View** in the **Menu Toolbar.** ³⁰⁶

2. Click **Full Screen Mode.** Full screen parameters can be determined **here.** ²⁴¹

The keyboard shortcut for this operation is F11.

▼ **Enable Snapping**

Snapping is a dynamic function within **PDF-XChange Editor** that facilitates the precise alignment of annotations and comments to underlying measurement guides or existing objects. Follow the instructions below to enable snapping and view/edit associated parameters:

1. Click **View** in the **Menu Toolbar.** ³⁰⁶

2. Hover over **Snap.**

3. Click **Enable Snapping.** See **here** 528 for further information.

The keyboard shortcut for this operation is Ctrl+Shift+;.

▼ **Hide Licensed Features from Toolbars and Menus**

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Select the **Hide all licensed features from toolbars and menus** box.

4. Click **OK.**

▼ **Reset the Panes Layout of Active Documents**

1. Click **Window** in the **Menu Toolbar.** 306

2. Click **Reset Document Panes Layout.**

▼ **Reset the Layout of Global Panes**

This setting is used to reset the layout of all panes within **PDF-XChange Editor:**

1. Click **Window** in the **Menu Toolbar.** 306

2. Click **Reset Main Panes Layout.**

▼ **Set Attachment Security**

The attachment security settings determine the action that **PDF-XChange Editor** takes when opening attachments. Follow the instructions below to determine these settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Security** in the **Categories** menu.

4. Determine parameters as detailed **here.** 266

5. Click **OK.**

▼ **Show/Hide Editing Panes**

There are several editing panes within **PDF-XChange Editor** that assist in the smooth and efficient editing of documents. Follow the instructions below to enable these editing panes:

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.** Available panes are displayed in the top section of the submenu.

3. Click panes to show/hide them in the workspace. See **here** 501 for further information.

▼ **Show/Hide the Bookmarks/Thumbnails Pane**

The **Bookmarks** and **Thumnails** panes assist in document editing and navigation. Follow the instructions below to enable these panes:

1. Click **View** in the **Menu Toolbar.** 306

2. Click **Bookmarks/Thumbnails.** See **here** 501 for further information.

▼ **Set File Open Security**

The file open security settings determine the action that **PDF-XChange Editor** takes when opening files. Follow the instructions below to determine these settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Security** in the **Categories** menu.

4. Determine parameters as detailed **here.** 266

5. Click **OK.**

▼ **Set Site Open Security**

The site open security settings determine the action that **PDF-XChange Editor** takes when opening websites. Follow the instructions below to determine these settings:

1. Click **Edit** in the **Menu Toolbar.** 306

2. Click **Preferences.**

3. Click **Security** in the **Categories** menu.

4. Determine parameters as detailed **here.** 266

5. Click **OK.**

Additionally, further workspace customization options are available via the **Keyboard Shortcuts.** 814

5.6.2   **Navigate the Workspace**

Navigate the Workspace

PDF-XChange Editor features multiple features that enable the navigation of the workspace. See below for instructions on how to:

▼ **Browse Open Documents**

1. Click **Hand Tool** in the **Shortcut Toolbar.** 42

2. Click and drag on empty space within the document. The page will scroll accordingly. If a different tool from the **Hand Tool** is selected then press and hold the space bar in order to enable the hand tool temporarily. See **here** 636 for further customizable features of the **Hand Tool.**

The **Page Navigation Toolbar** 478 also provides several useful shortcuts for browsing open documents.

▼ **Enable Document Autoscroll**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Page Layout.**

3. Click **Automatically Scroll.**

The keyboard shortcut for this operation is Ctrl+Shift+H.

▼ **Navigate Backwards One Step**

Navigating backwards one step will move to the previously viewed location.

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Back.**

The keyboard shortcut for this operation is Alt+Left.

▼ **Navigate Forwards One Step**

Navigating forwards one step will move to the next viewed location. This option becomes possible when a navigate backwards operation has taken place.

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Forward.**

The keyboard shortcut for this operation is Alt+Right.

▼ **Move to Selected Bookmark**

1. Click **View** in the **Menu Toolbar.** 306

2. Click **Bookmarks.** The **Bookmarks pane** 493 will open.

3. Select the desired bookmark.

4. Press Space.

▼ **Move to Selected Destination**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Other Panes.**

2. Click **Destinations.** The **Named Destinations pane** 503 will open.

3. Select the desired destination.

4. Press Space.

▼ **Move to a Specified Page**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Go To Page.** The **Go To Page** dialog box will open.

4. Enter the desired page number in the number box.

5. Click **OK.**

The keyboard shortcut for this feature is the Home key.

▼ **Move to the First Page of the Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **First Page.**

The keyboard shortcut for this operation is Ctrl+Shift+N.

▼ **Move to the Last Page of the Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Last Page.**

The keyboard shortcut for this operation is the End key.

▼ **Move to the Next Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Next Document.**

The keyboard shortcut for this operation is Ctrl+Tab.

▼ **Move to the Previous Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Previous Document.**

The keyboard shortcut for this operation is Ctrl+Shift+Tab.

▼ **Move to the Next Page of the Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Next Page.**

The keyboard shortcut for this operation is Ctrl+Right.

▼ **Move to the Previous Page of the Document**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Go To.**

3. Click **Previous Page.**

The keyboard shortcut for this operation is Ctrl+Left.

▼ **Rotate the Current View Clockwise**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Rotate View.**

3. Click **Rotate CW.**

The keyboard shortcut for this operation is Ctrl+Shift+Num+.

▼ **Rotate the Current View Counterclockwise**

1. Click **View** in the **Menu Toolbar.** 306

2. Hover over **Rotate View.**

3. Click **Rotate CCW.**

The keyboard shortcut for this operation is Ctrl+Shift+Num-.

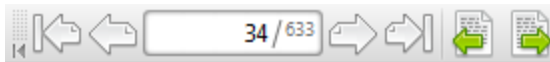The **Page Navigation Toolbar** 478 can be used to achieve many of the operations outlined above:

Figure 1. Page Navigation Toolbar

Additionally, the **Thumbnails Pane** 497 can be used to navigate and edit document pages.

6   Tabs Guide

Tabs Guide

This section of the manual details the tabs of the **<u>Menu Toolbar</u>** 306 in **PDF-XChange Editor:**
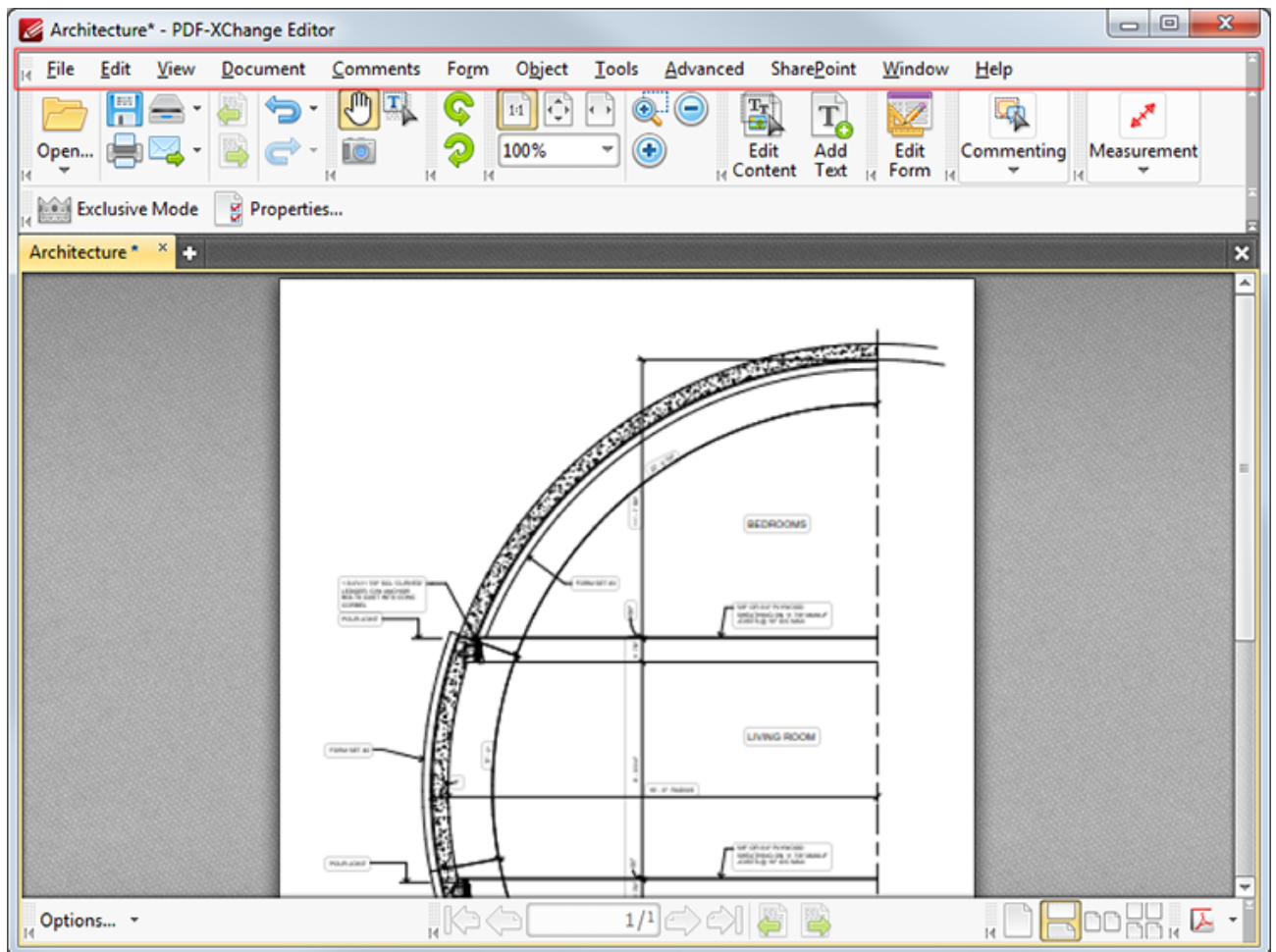
Figure 1. Menu Toolbar

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

- **<u>File</u>** 150 contains file-level operations such as open, close, save and print documents.

- **Edit** 215 contains editing options such as cut, copy, paste and delete selected content.
- **View** 297 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** 534 contains document editing options such as add/remove watermarks, edit backgrounds, crop pages and digital signature options.
- **Comments** 611 contains options for editing document comments, such as converting comments to base content, importing/exporting comments and creating a comment summary.
- **Form** 627 contains options for managing, highlighting and creating document form fields such as radio buttons, dropdown menus and barcodes.
- **Object** 629 contains object-specific commands such as resizing and repositioning content items.
- **Tools** 632 contains submenus of the **PDF-XChange Editor** tools, which can be used to manipulate, edit and annotate documents.
- **Advanced** 757 contains options that relate the creation and management of document bookmarks.
- **SharePoint** 786 contains options that relate to files associated with the **Microsoft Office SharePoint Server.**
- **Window** 788 contains options that relate to the display of the main window.
- **Help** 790 contains links to software assistance, such as the **PDF-XChange** website and user forum.

6.1   File

 File

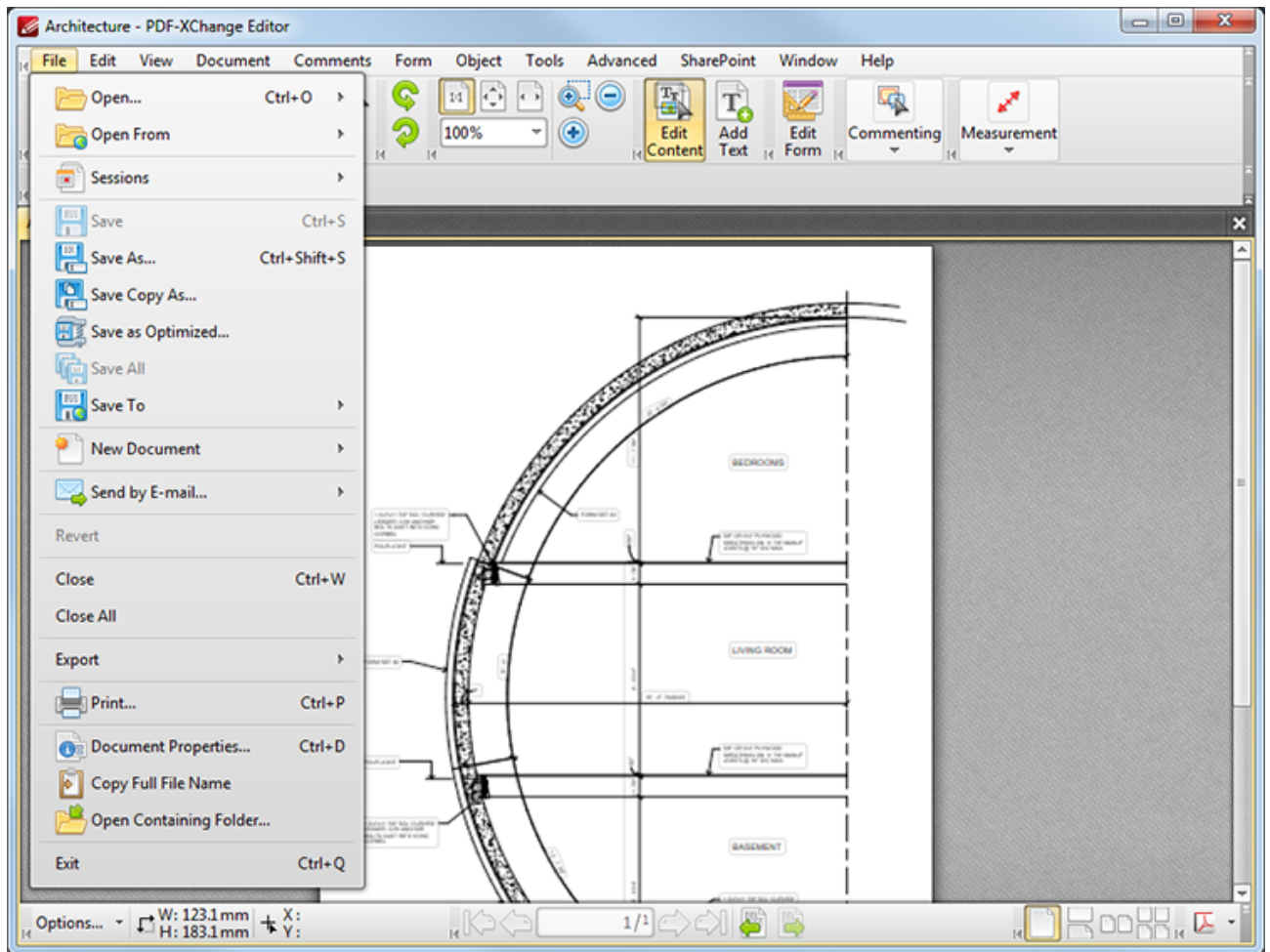When the **File** tab is selected, the following options are available:

Figure 1. File Tab Submenu

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

- **Open/Open From** 152
- **Sessions** 154
- **Save Options** 157
- **New Document** 162
- **Send by E-mail** 190
- **Revert** 192
- **Close Options** 193
- **Export** 195
- **Print** 198
- **Document Properties** 204
- **Copy Full File Name** 213
- **Open Containing Folder** 214

Additionally, see the **Document Operations Guide** 66 for further information and step-by-step instructions to using the features contained in this menu.

6.1.1 **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:**
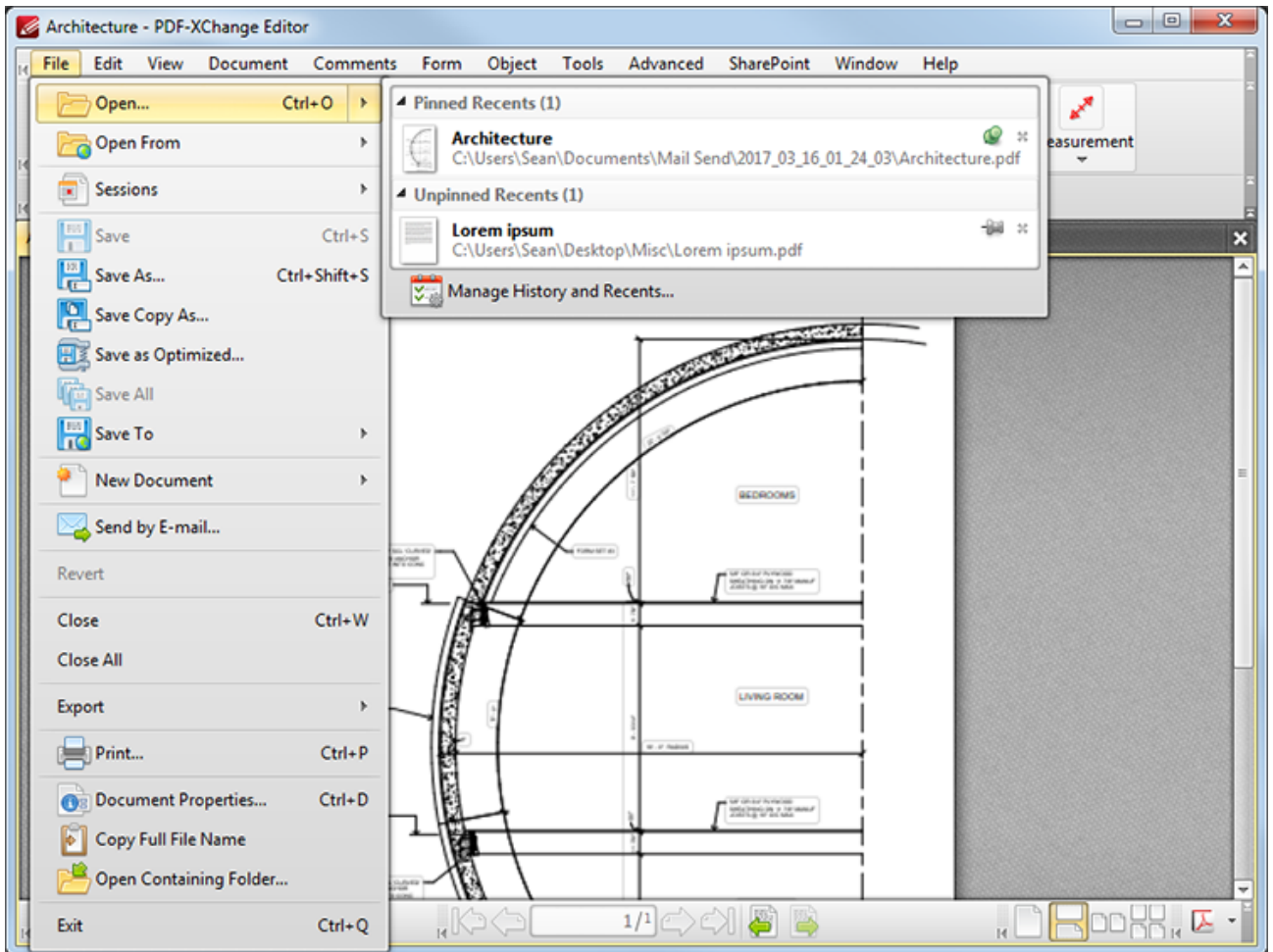

Figure 1. File Tab Submenu. Open Option

- All documents viewed previously in **PDF-XChange Editor** are detailed chronologically in the **Unpinned Recents** list.
- The pin feature is included so documents considered more important are not moved down the list when new documents are viewed. They will remain in the **Pinned Recents** list instead. Click the pin icon next to unpinned documents in order to add documents to the list of **Pinned Recents.**
- Click the pin icon next to **Pinned Recents** in order to remove documents from the list. Click documents from either list in order to open them.
- Hover the pointer over documents to view document properties. Alternatively, click **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. Follow the on-screen instructions for these options.
- Click **Manage History and Recents** to view/edit the **History** and **Recent List Options.**

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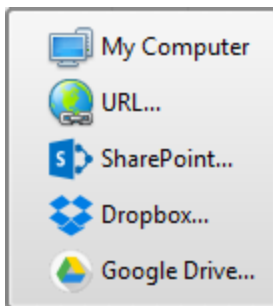

Figure 2. Open From Options

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

6.1.2 Sessions

Sessions

Hover over **Sessions** to launch the following submenu:
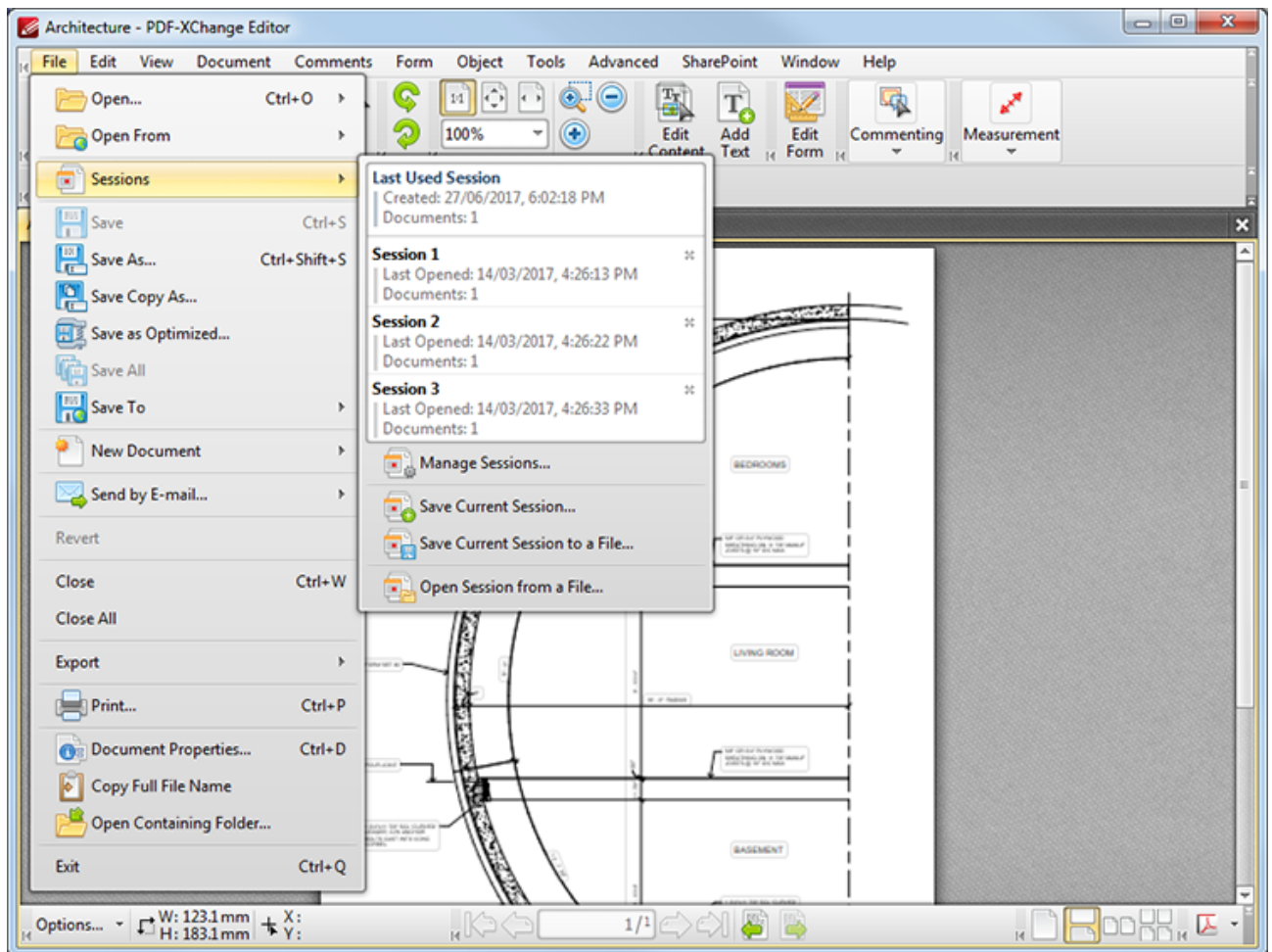

Figure 1. File Tab Submenu. Sessions Option

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 other panes such as the **Thumbnails/Properties** pane. The most recent sessions are detailed in the **Last Used Session** pane. The other options are detailed below:

Click **Manage Sessions** to manage existing sessions. The **Manage Sessions** dialog box will open:
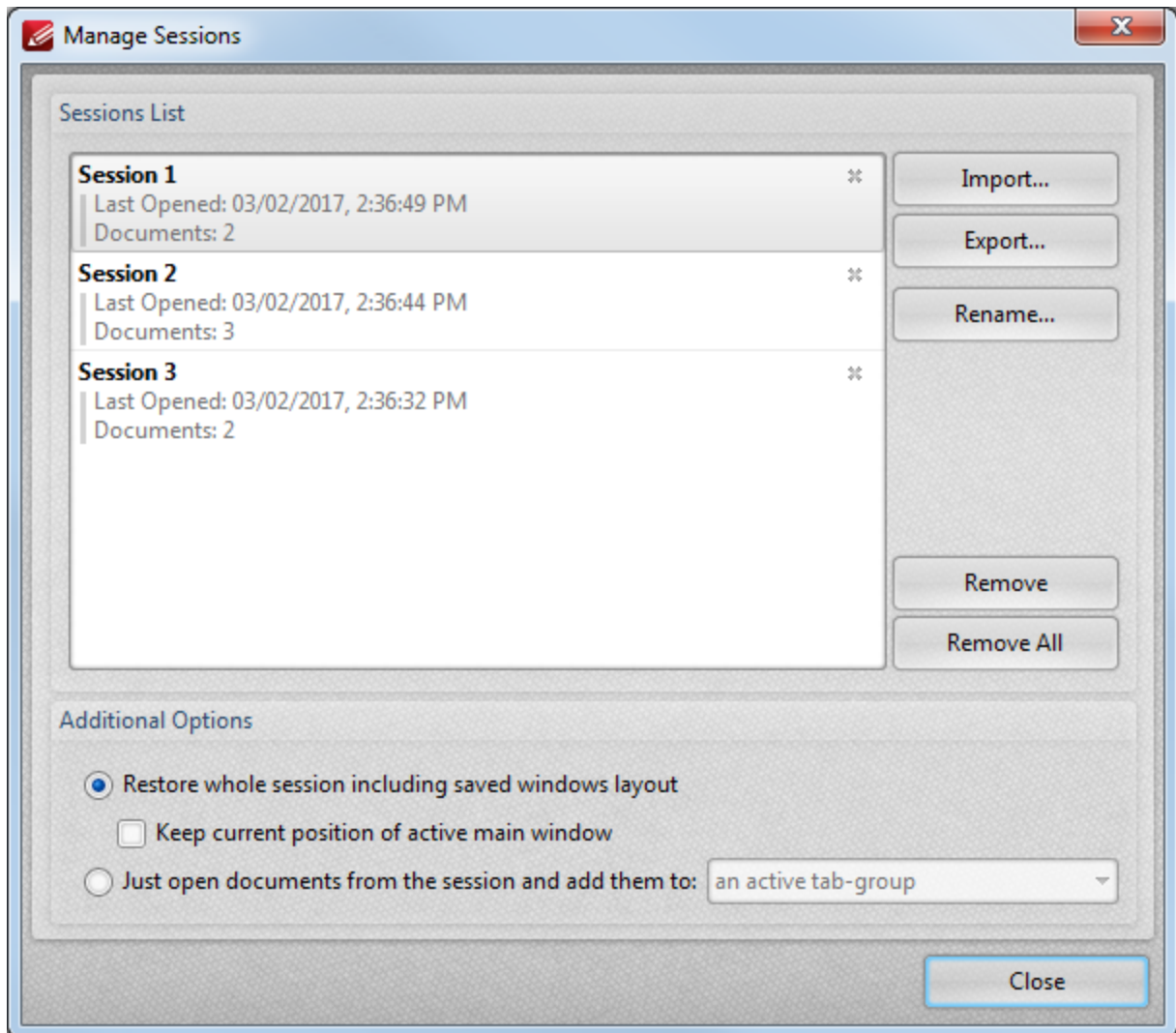
Figure 2. Manage Sessions Dialog Box

- 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**

Click **Save Current Session** in order 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** in order 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.

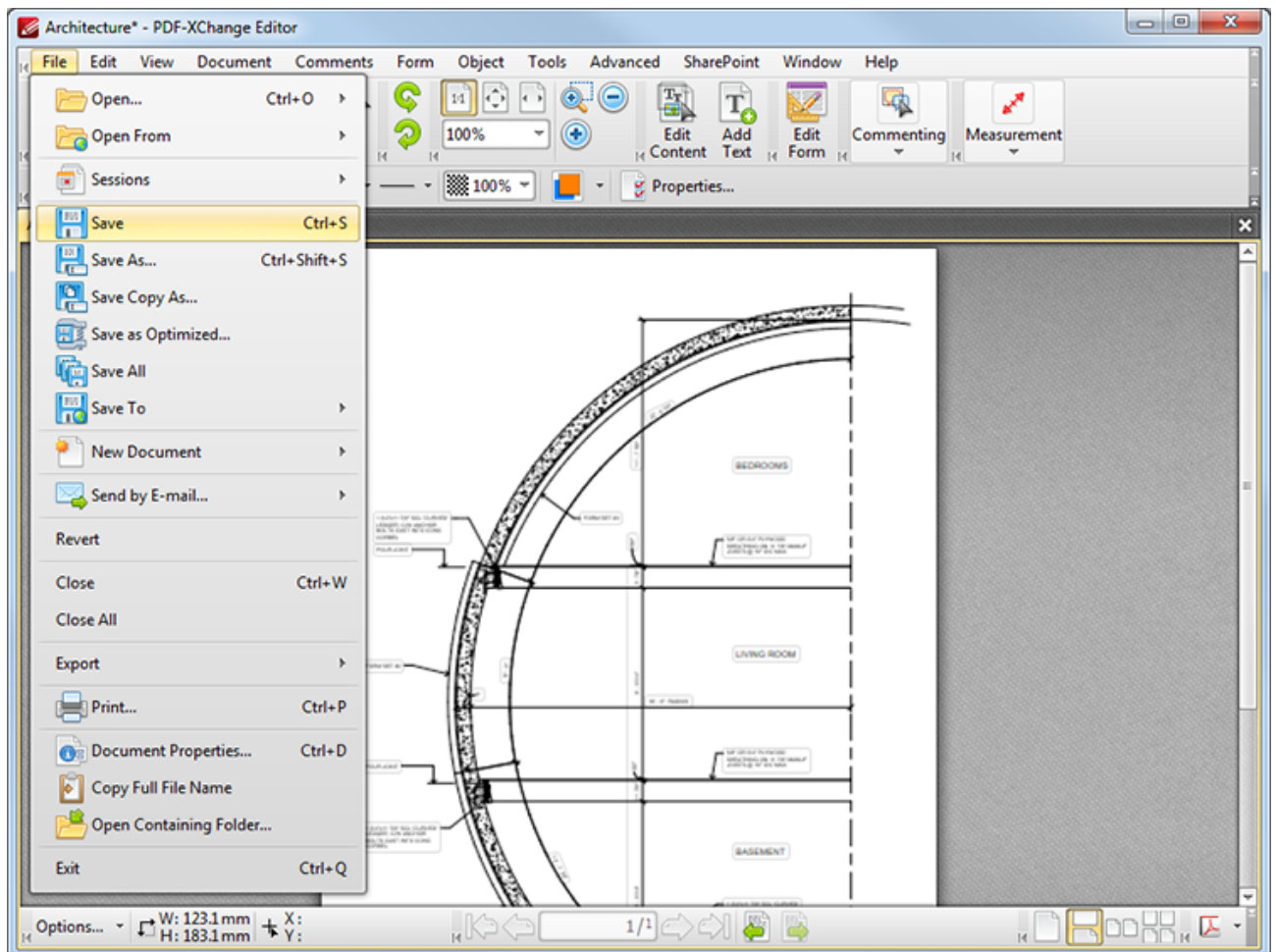Click **Open Session from a File** to open a session saved in the **.xcesession** format as detailed above.

6.1.3   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 retain the original version. Use the **Save as type** menu to determine the format of the saved file. When a format is selected, click the **Options** button beneath the **Save as Type** menu to determine format-specific options.
- Click **Save Copy As** to save a copy of the document with its current changes. The **Save File As** dialog box will launch when this option is selected. The file name will be entered automatically in the **File Name** text box with the word 'Copy' added afterwards.
- Click **Save All** to save all open documents.
- Click **Save To** to save documents directly to My Computer, Sharepoint, Dropbox or Google Drive.
- Click **Save as Optimized** to optimize files before they are saved. When this option is selected the **Optimize PDF** dialog box will open:
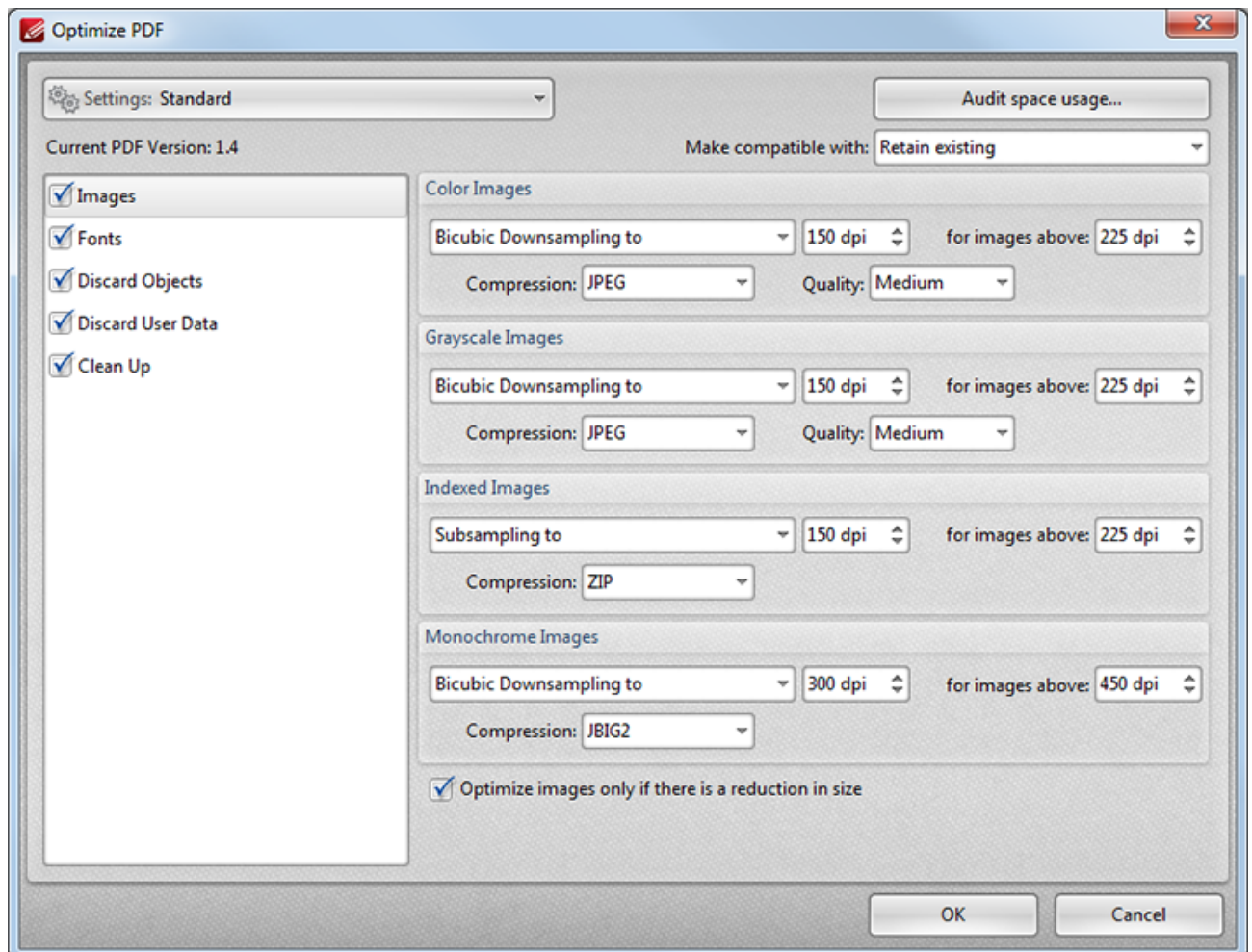
Figure 2. Optimize PDF Dialog Box

- Use the **Settings** menu to toggle between **Standard Mode,** which is best for computers, and **Mobile mode,** which is best for tablets and cell phones. When custom details have been entered into the variable parameters of the **Optimize PDF** dialog box they can be saved for

subsequent use. Click the **Settings** menu and select **Save Current Settings.** Enter a name and short description for the settings. Click **OK** to save the settings. Use the **Manage** option of the **Settings** menu to **Edit, Delete** or **Clone** custom settings.

- Click the **Audit Space Usage** button to view a breakdown of the space within the active file.
- Use the **Make compatible with** menu to select the version of Acrobat with which to make the current document compatible.
- Select the desired boxes from the choices on the left: **Images, Fonts, Discard Objects, Discard User Data** and **Clean Up.** Selected options will be included in the optimization process. Each option has further settings as detailed below:

Images

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

Fonts

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

Discard Objects

- Select the **Discard all form submissions, import and reset actions** box to remove these elements from the document.
- Select the **Discard all JavaScript actions** box to remove JavaScript from the document.
- Select the **Discard all alternate images** box to remove instances of alternate images from the document.
- Select the **Discard embedded page thumbnails** box to remove embedded custom page thumbnails from the document.
- Select the **Detect and merge image fragments** box to merge image fragments. (Some images are composed of fragmented sections that are spliced together. Selecting this option can significantly reduce the file size).
- Select the **Discard embedded print settings** box to discard left-over encoding from when the document was created with a virtual printer.
- Select the **Discard bookmarks** box to remove all bookmarks from the document.

Discard User Data

- Select the **Discard all Comments, forms and multimedia** box to remove all form fields, comments and annotations from the document.
- Select the **Discard document information and metadata** box to remove all document metadata as detailed **here.** 204
- Select the **Discard file attachments** box to remove attached/embedded files from the document.
- Select the **Discard private data of other applications** box to remove information from the document that is useful only to the application used to create it.
- Select the **Discard hidden layer content and flatten visible layers** box to remove hidden layers from the document.

Clean Up

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

- Select the **Discard unreferenced named destinations** as desired.
- Select the **Find and Remove the content outside the crop box** box to remove (as opposed to hide, which is the default setting) content outside the crop box.
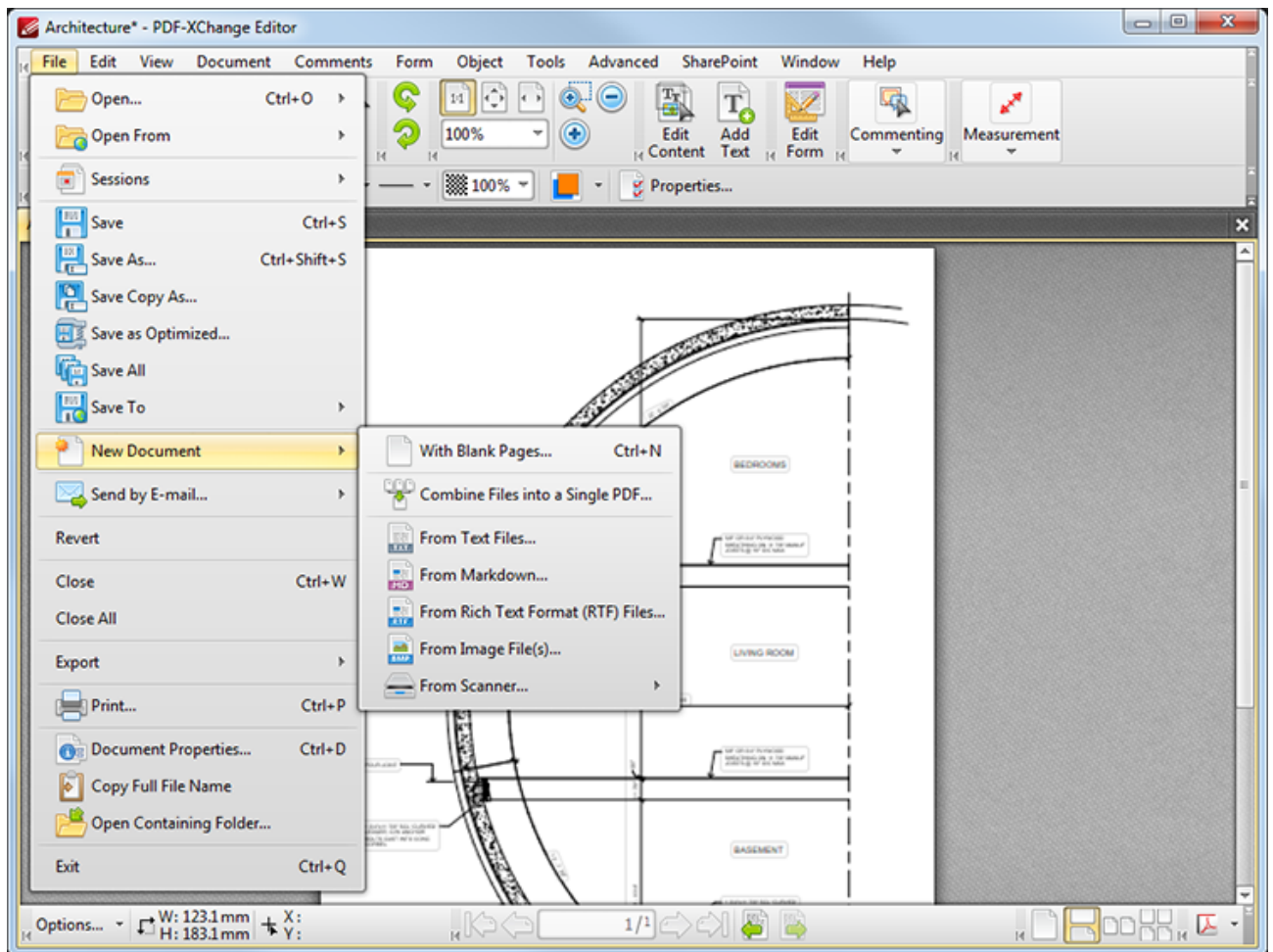
Click **OK** to save settings.

6.1.4   **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:

-
-

- **From Text Files** 169
- **From Markdown** 173
- **From Rich Text Format (RTF) Files** 175
- **From Image File(s)** 177
- **From Scanner** 186

6.1.4.1 With Blank Pages

 With Blank Pages

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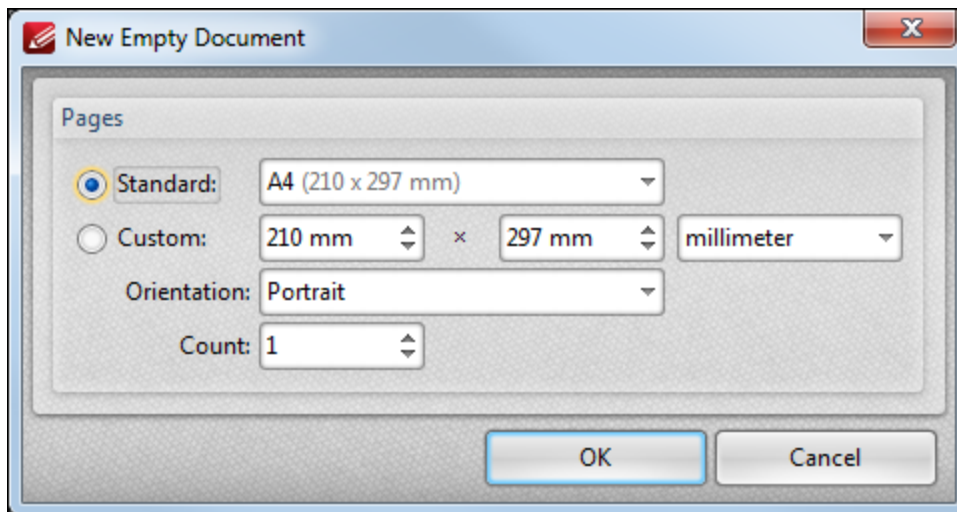
Figure 1. New Empty Document Dialog Box

- 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 launch the new document.

6.1.4.2 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:
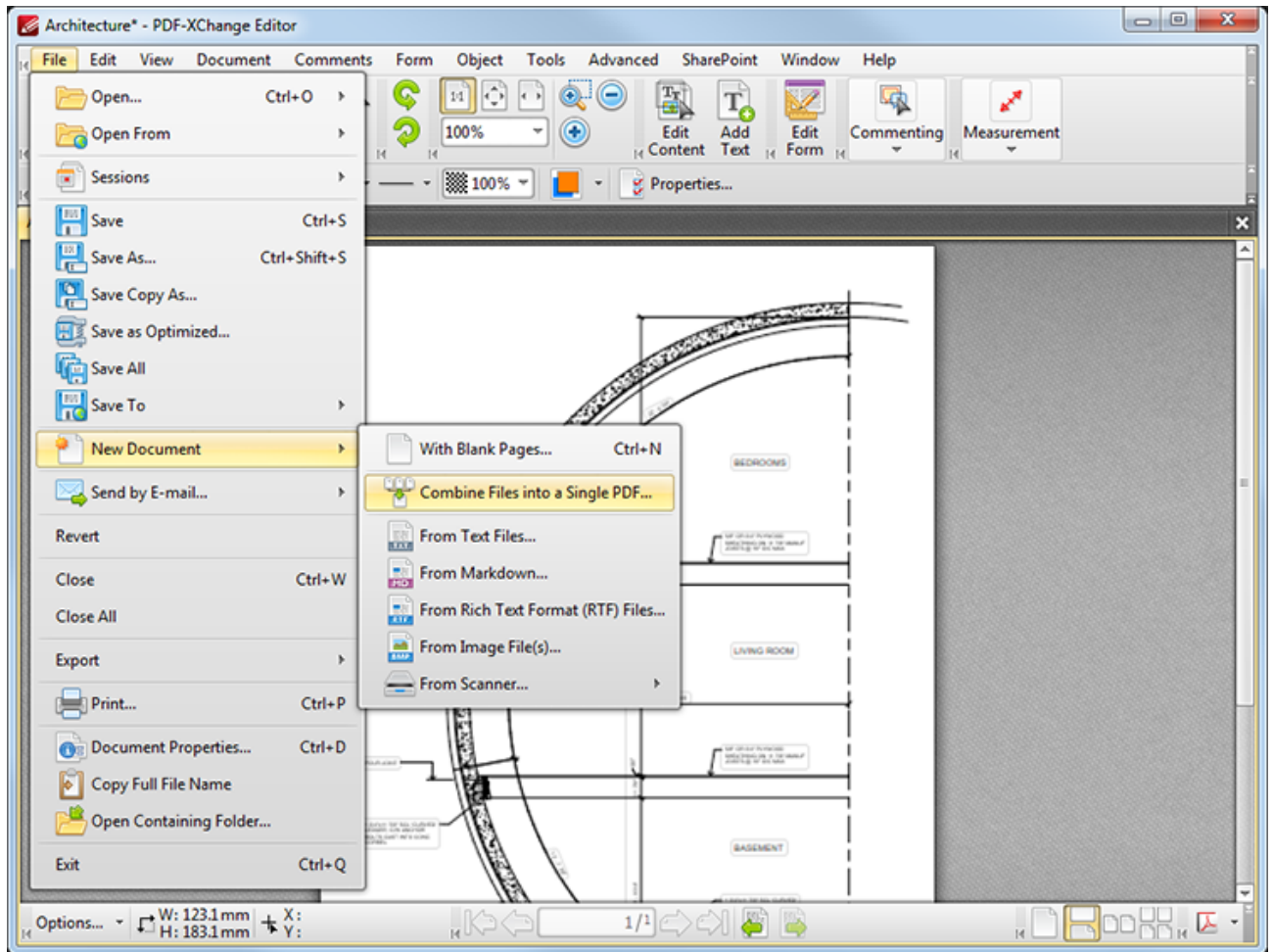
Figure 1. New Document Submenu. Combine Files into a Single PDF
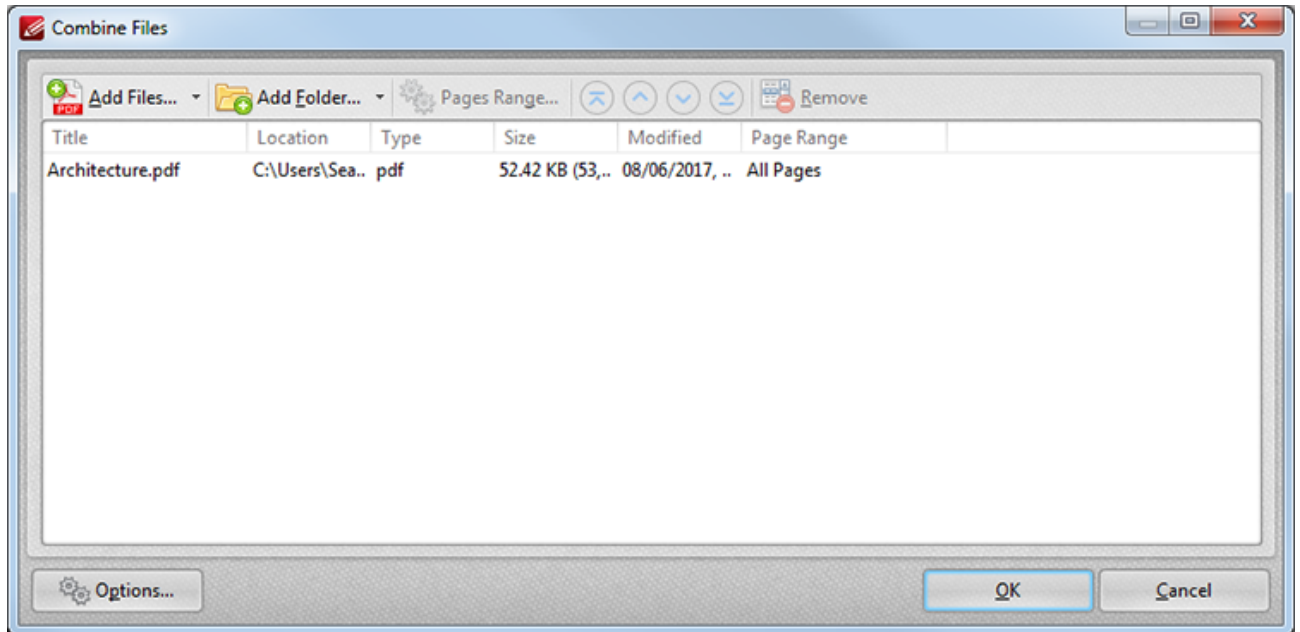
The following dialog box will open:

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 **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 **Pages Range** to determine the page range of selected documents. Page range settings are explained **here.** 860
- Use the arrow icons 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.
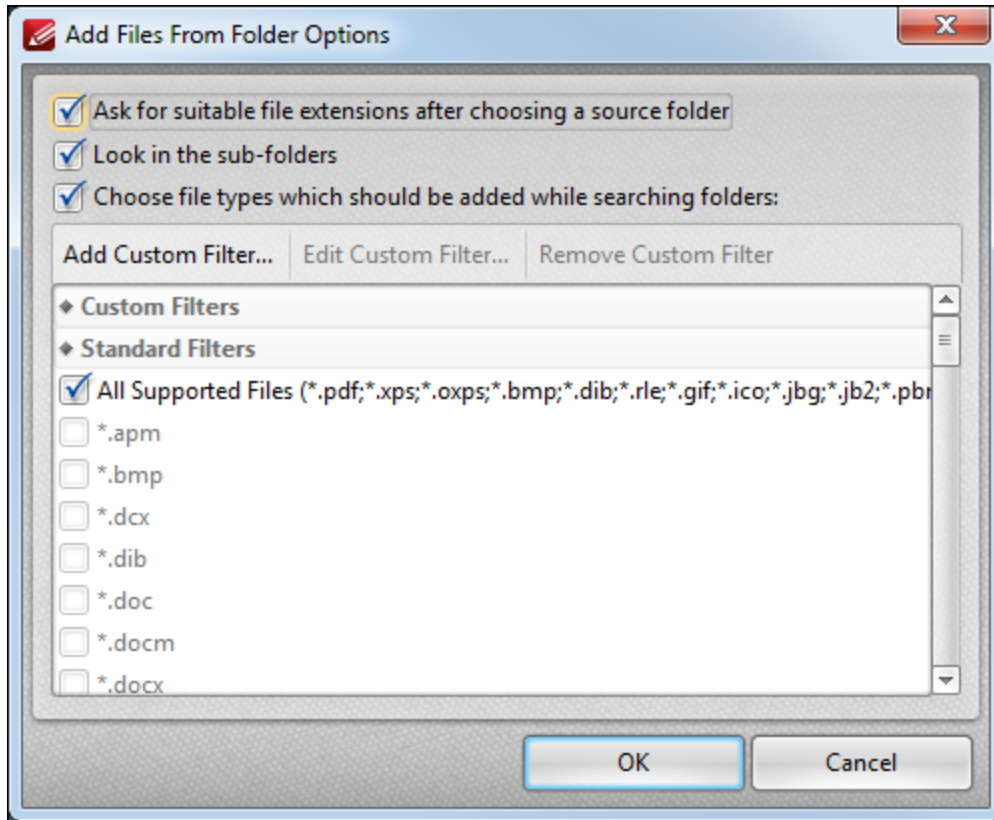
Figure 3. Add Files From Folder Options Dialog Box

- 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 **Look in the sub-folders** box to include sub-folders of the parent folder when the software searches for files to add to the list of source files.
- Select the **Choose file types which should be added while searching folders** box to determine file types to be included when the software performs a search.
- Custom filters can be added using the **Add Custom Filter** option. This facilitates the creation of custom profiles for subsequent use that search for specific file extensions. Click the text to open the **Add Custom Filter** dialog box:
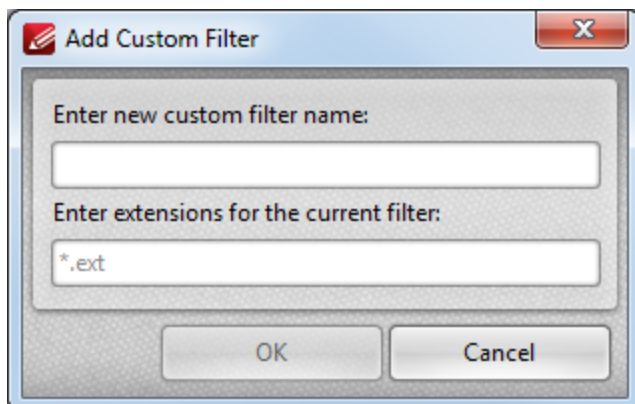
Figure 4. Add Custom Filter Dialog Box

- 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.
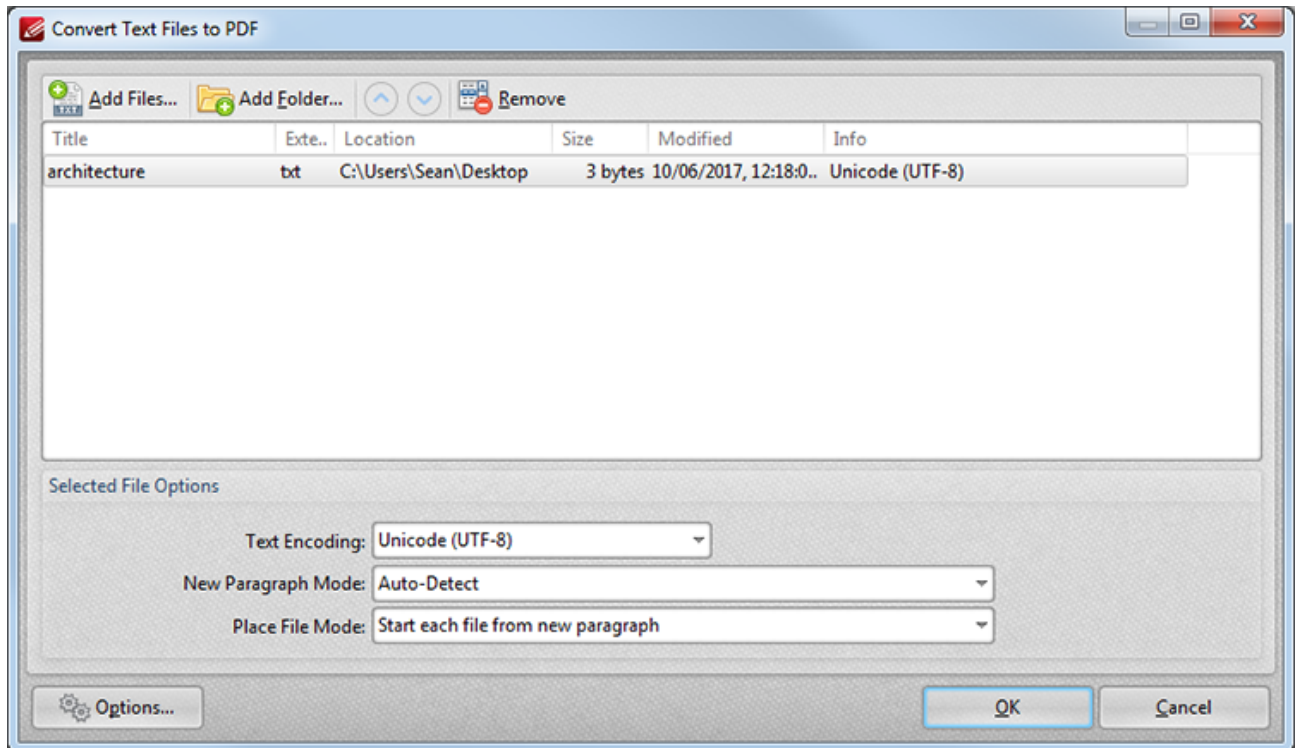
6.1.4.3 From Text Files

From Text Files

Click **From Text Files** to convert text files into PDF. The following dialog box will open:

Figure 1. 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** 165 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:
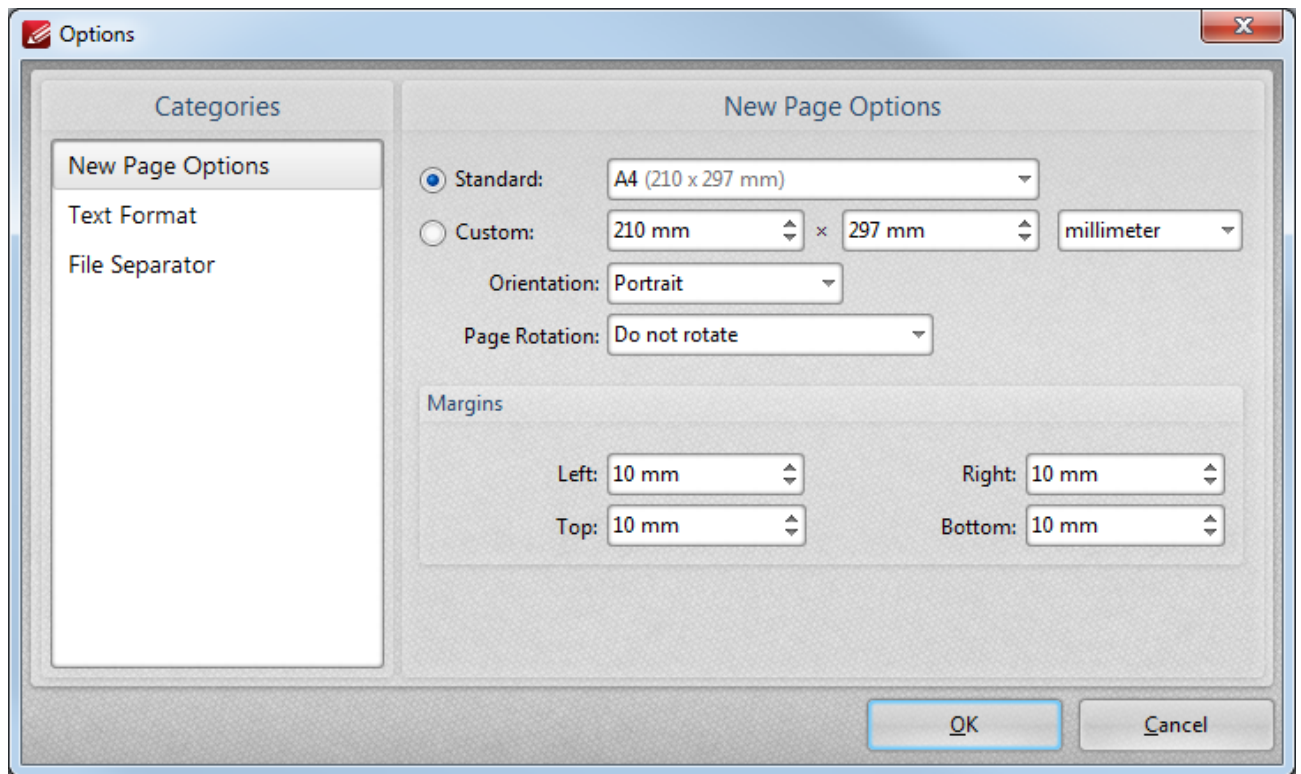
Figure 2. Options Dialog Box

New Page Options

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

Text Format

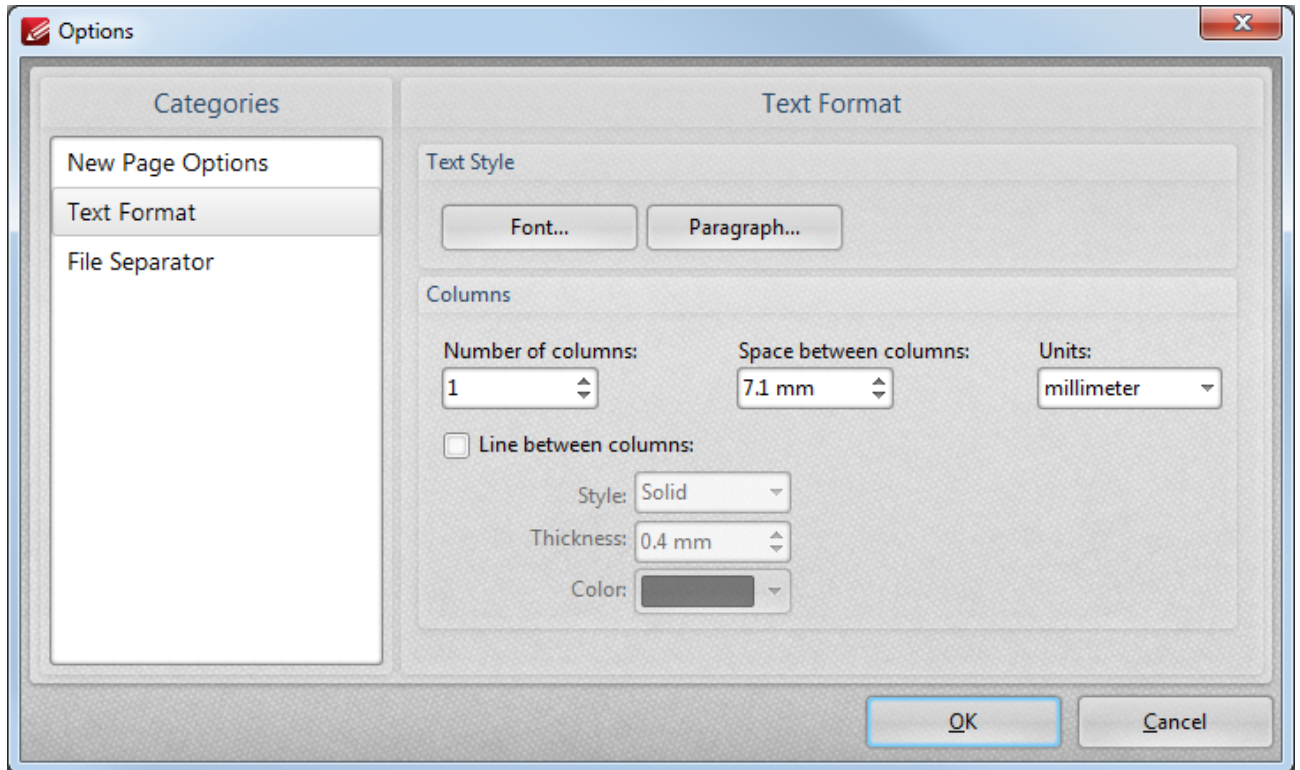When this option is selected, the following dialog box will open:

Figure 3. Text Format Options

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

File Separator

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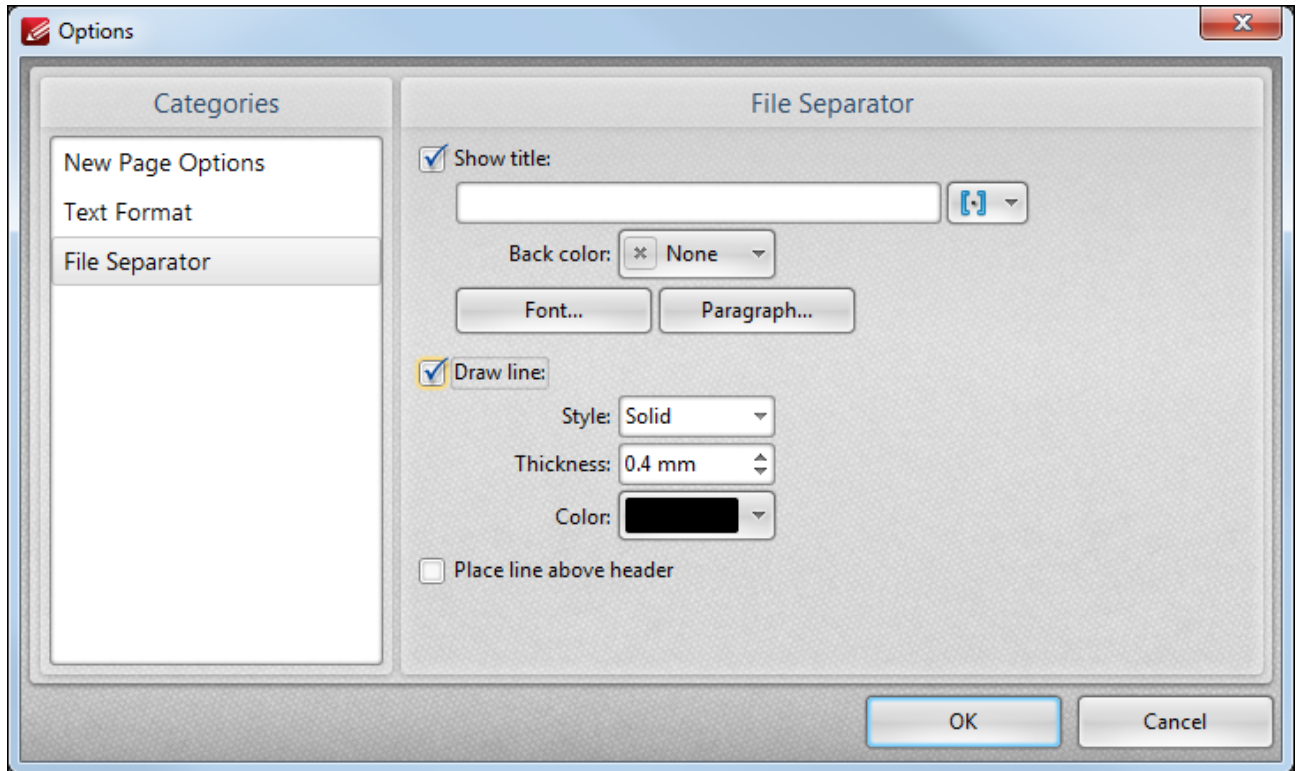
Figure 4. File Separator Options

- Select the **Show title** box to give the file separator a title. Click the icon to add **macros.** [830]
- 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.

6.1.4.4 **From Markdown**

From Markdown

Click **From Markdown** to convert Markdown files into PDF format. The following dialog box will open:
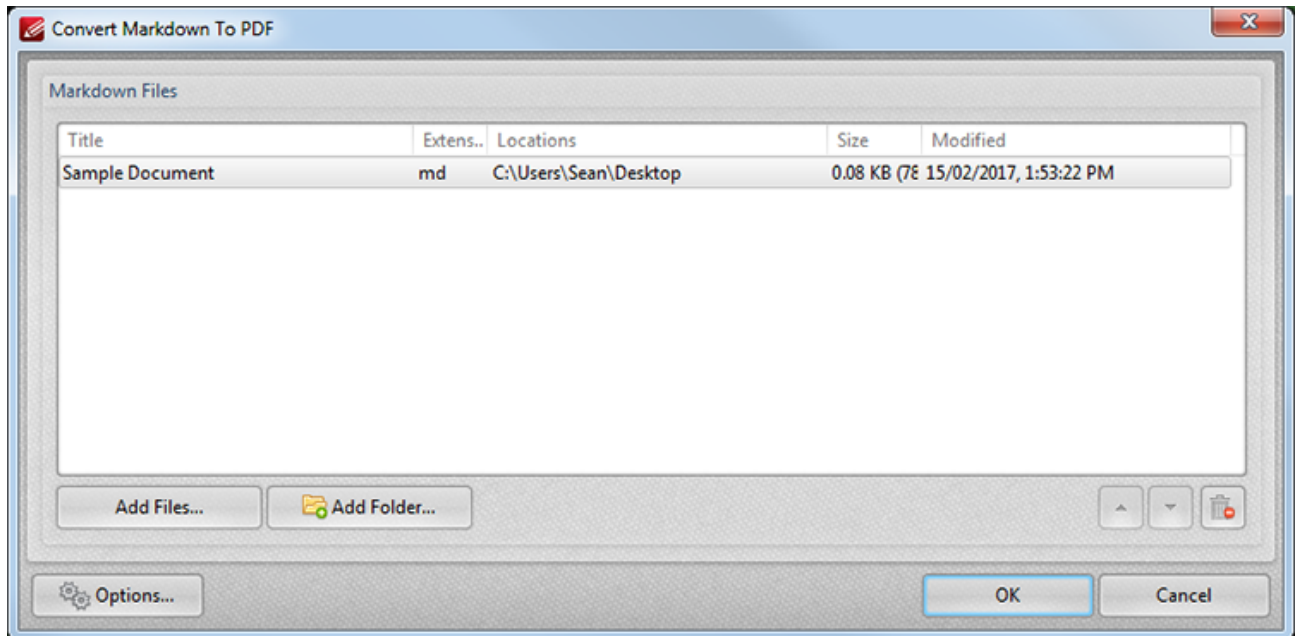
Figure 1. Convert Markdown to PDF Dialog Box

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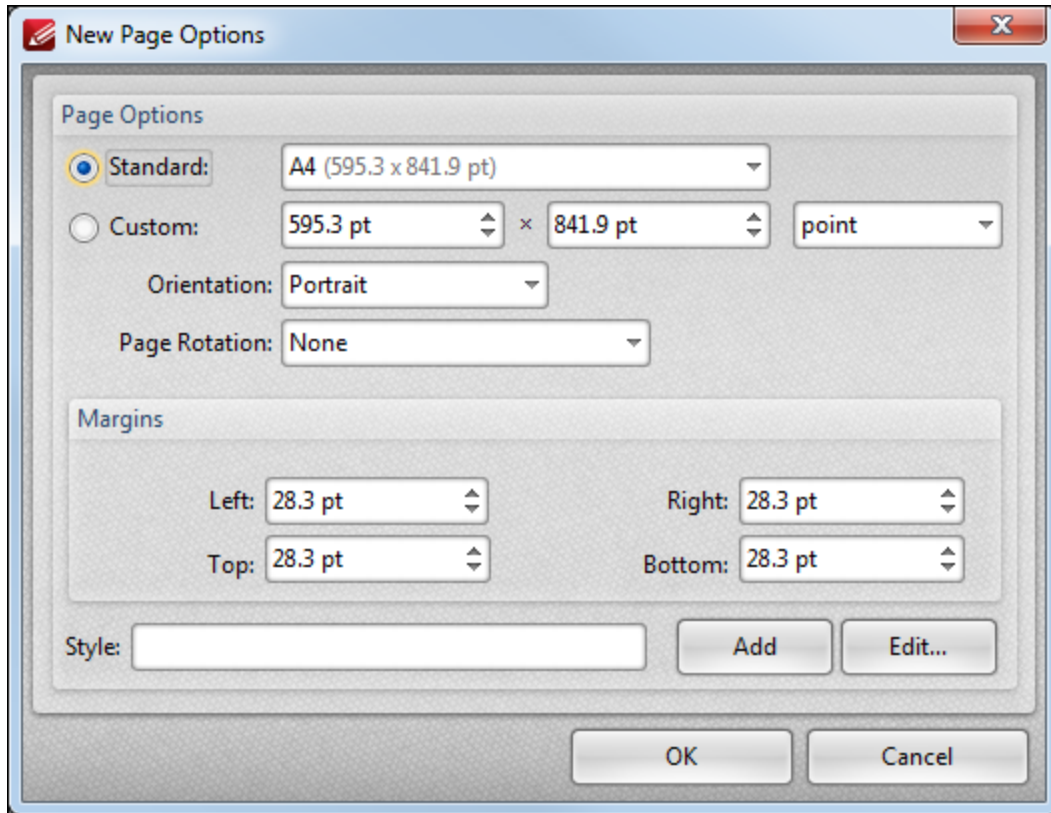
Figure 2. New Page Options Dialog Box

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

Click **OK** to save settings.

6.1.4.5 From Rich Text Format (RTF) Files

From Rich Text Format (RTF) Files

Click **From Rich Text Format (RTF) Files** to convert RTF files into PDF format. The following dialog box will open:
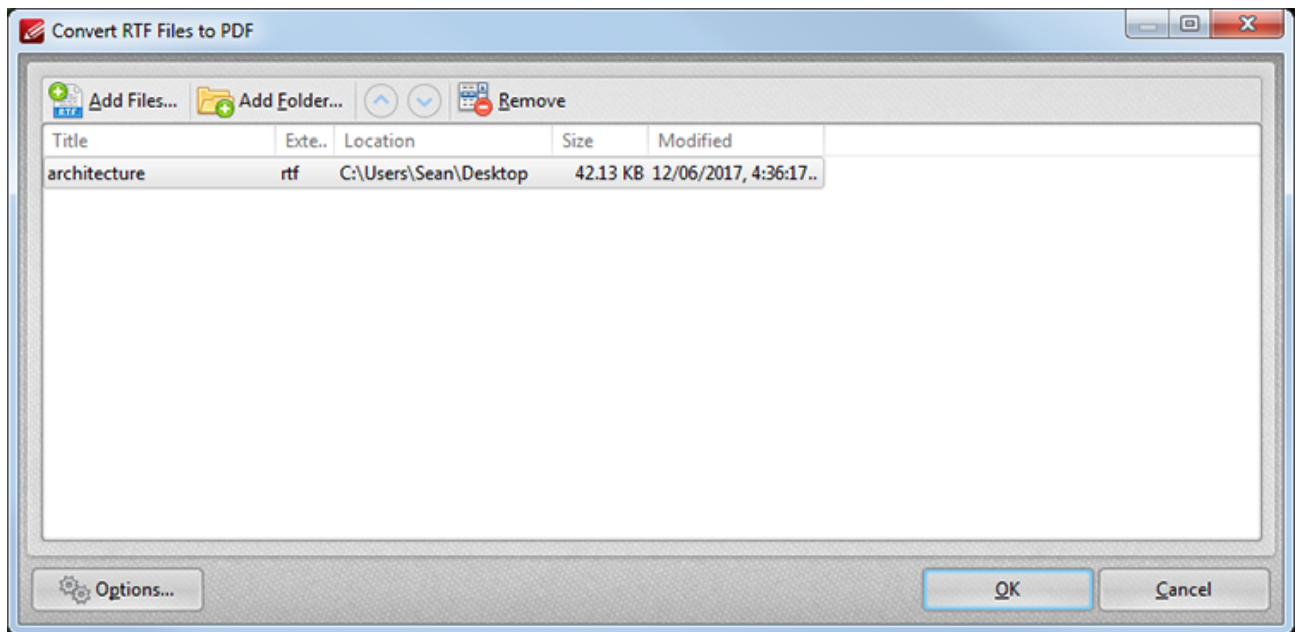

Figure 1. Convert RTF Files to PDF

The options are the same as those outlined in the **Combine Files into a Single PDF** ₍165₎ section with the differences that files must be in **.rtf** format and the parameters are different when the **Options** button is selected:
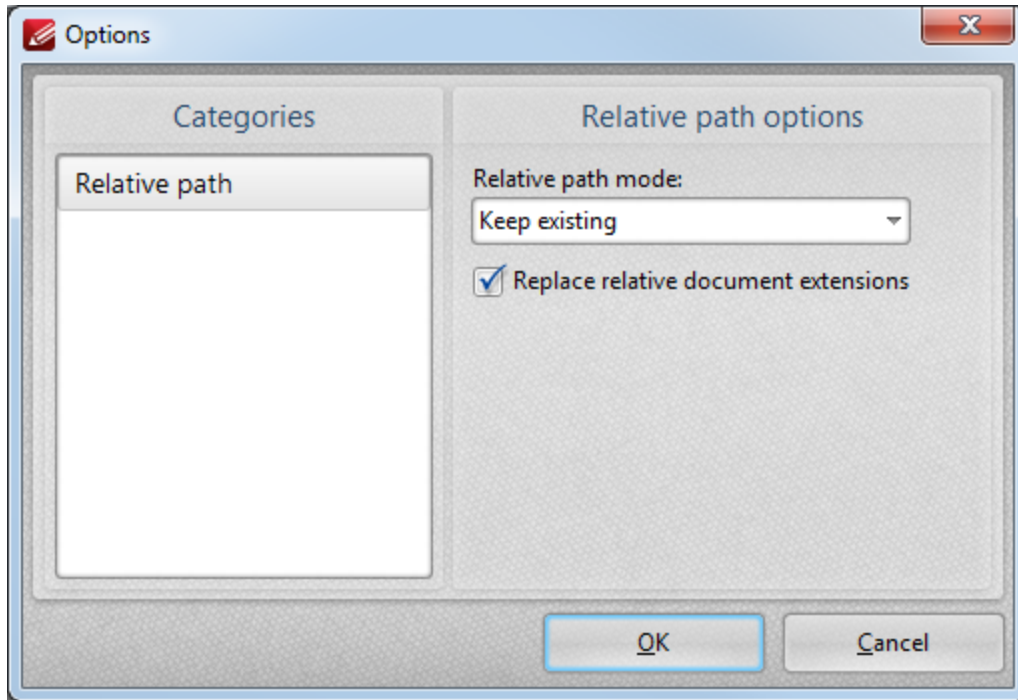
Figure 2. Convert RTF files to PDF Options

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

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

Click **OK** to save settings.

6.1.4.6 From Image File(s)

From Image File(s)

Click **From Image Files** to convert image files into PDF format:
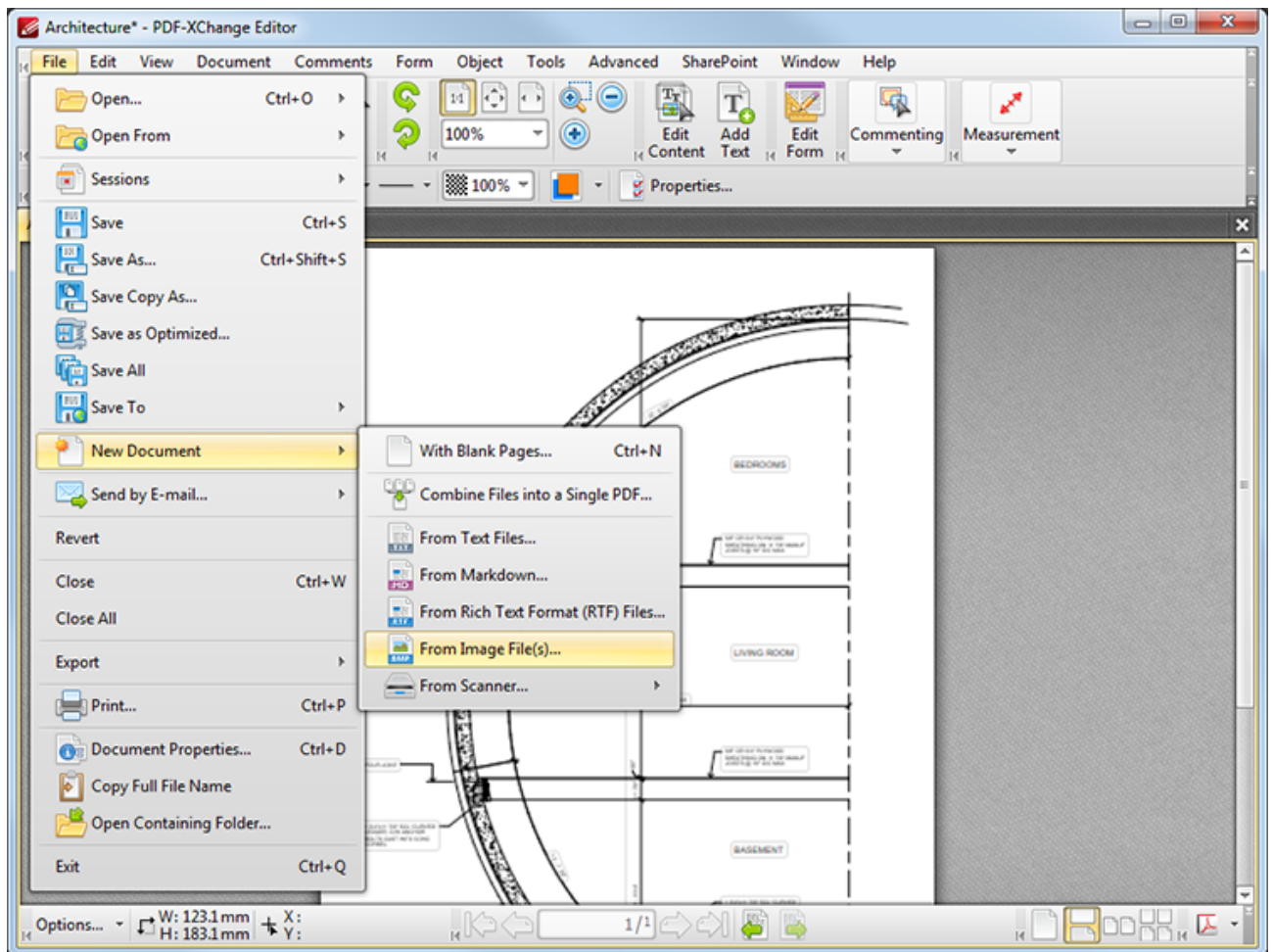
Figure 1. New Document Submenu. From Image Files
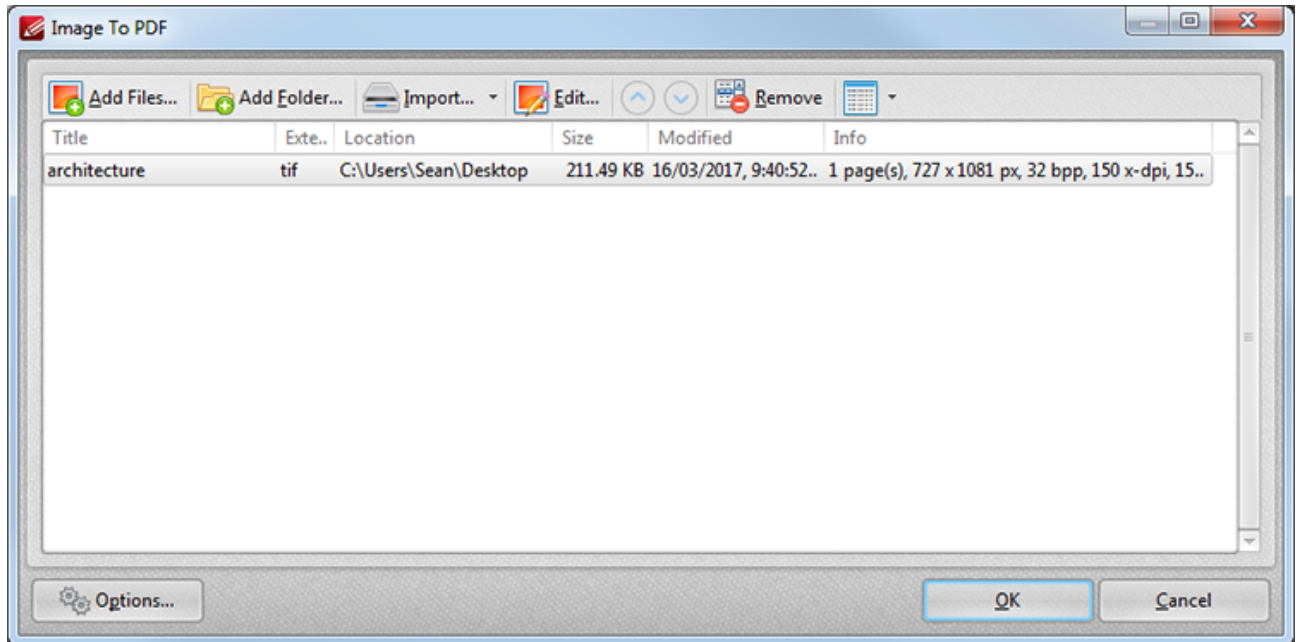
The following dialog box will open:

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** 165 section.
- Click **Import** to add images from the local scanner. The **Scan Properties** dialog box will open. Select the desired parameters as detailed **here** 558 and click **Scan** to import images.
- Select an image from the **Source image files** list and click **Edit** to edit it before it is combined with the other documents.
- Click the arrow icons to move images up or down within the list. Click the trash can icon to remove selected images from the list. The format in which files are shown within the list can be adjusted using the icon on the far right.
- Click **Options** for further options. These options are detailed below.
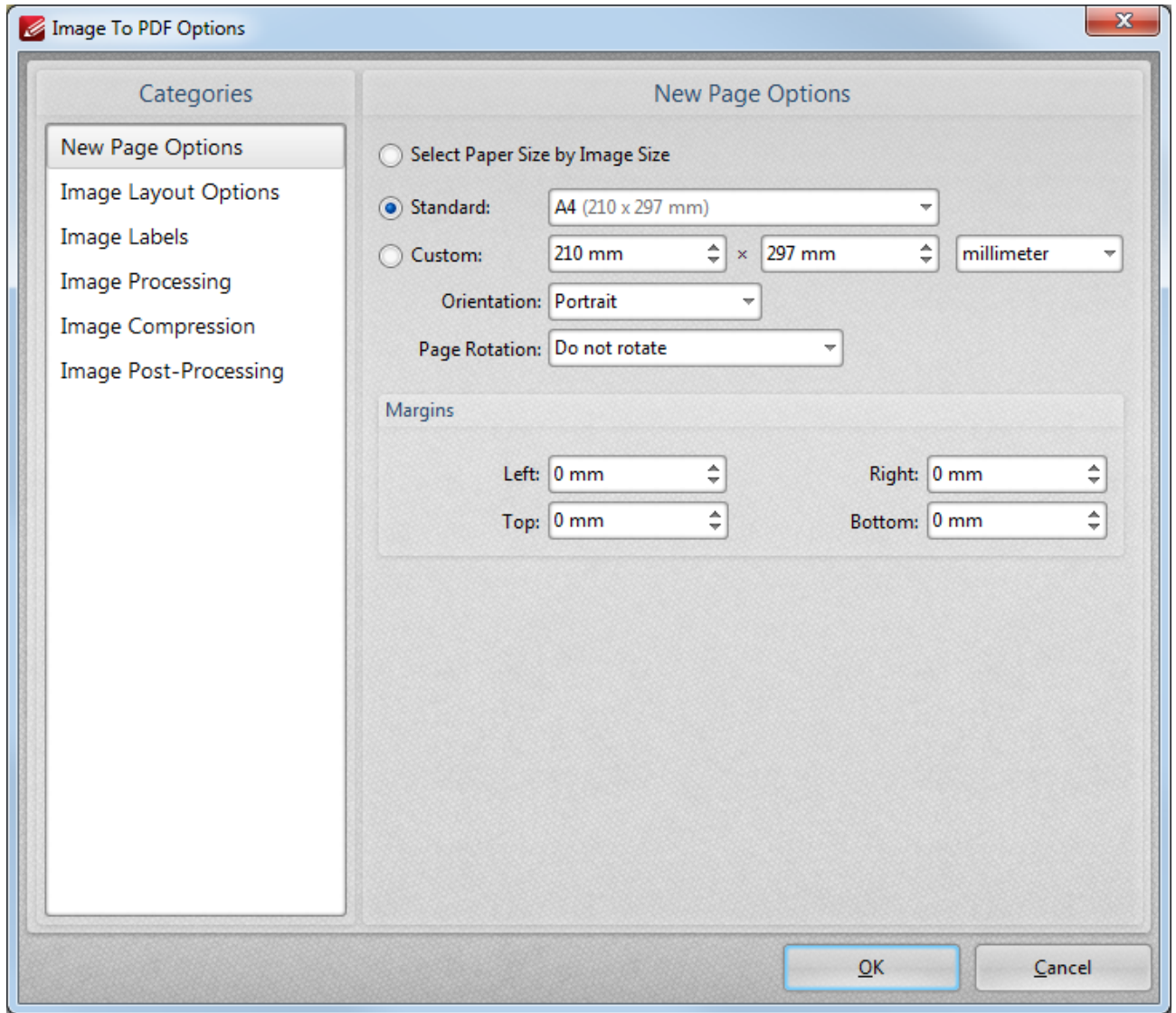- Click **OK** to create the new document.

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 2)* opens. The options are as follows:

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

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

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

Images Layout Options

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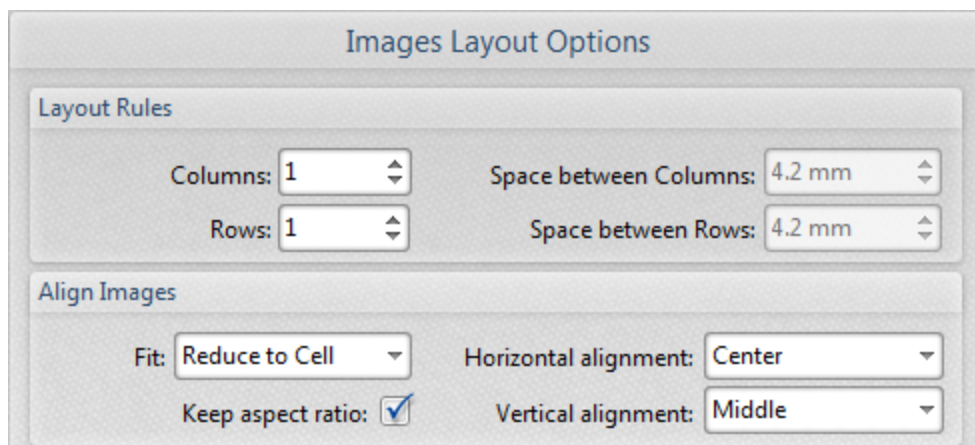
Figure 4. Images Layout Options Dialog Box

- 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.

When this option is selected in the **Categories** menu the following dialog box opens:
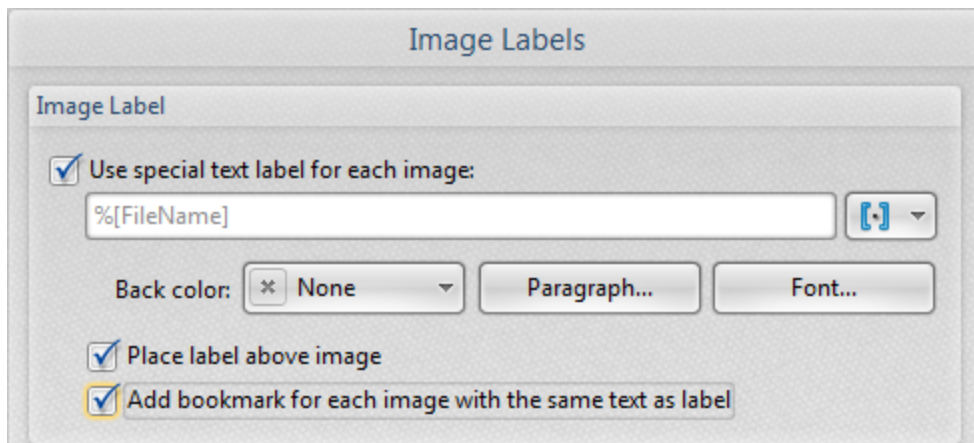

Figure 5. Image Labels Dialog Box

- Select the **Use special text label for each image** box to enable further options.
- Enter the desired label text in the text box. **Macros** [830] can be added at this point. Include them in the file name or click the icon to select them manually.
- **Back Color** determines the background color of the label. Click the box to open a menu of available colors.
- The **Paragraph** settings determine the alignment, indentation and spacing of the text on the label. Click **Paragraph** to adjust these settings. The indentation settings include two special options. Select the **First Line** option to indent the first line, as in a standard paragraph. The second special option is **Hanging** indentation, which means the first line is not indented but all subsequent lines are. When either of these settings are being used the **'By'** box must be adjusted accordingly.
- The **Font** settings determine the font used for the label. When it is selected the dialog box in **(figure 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).
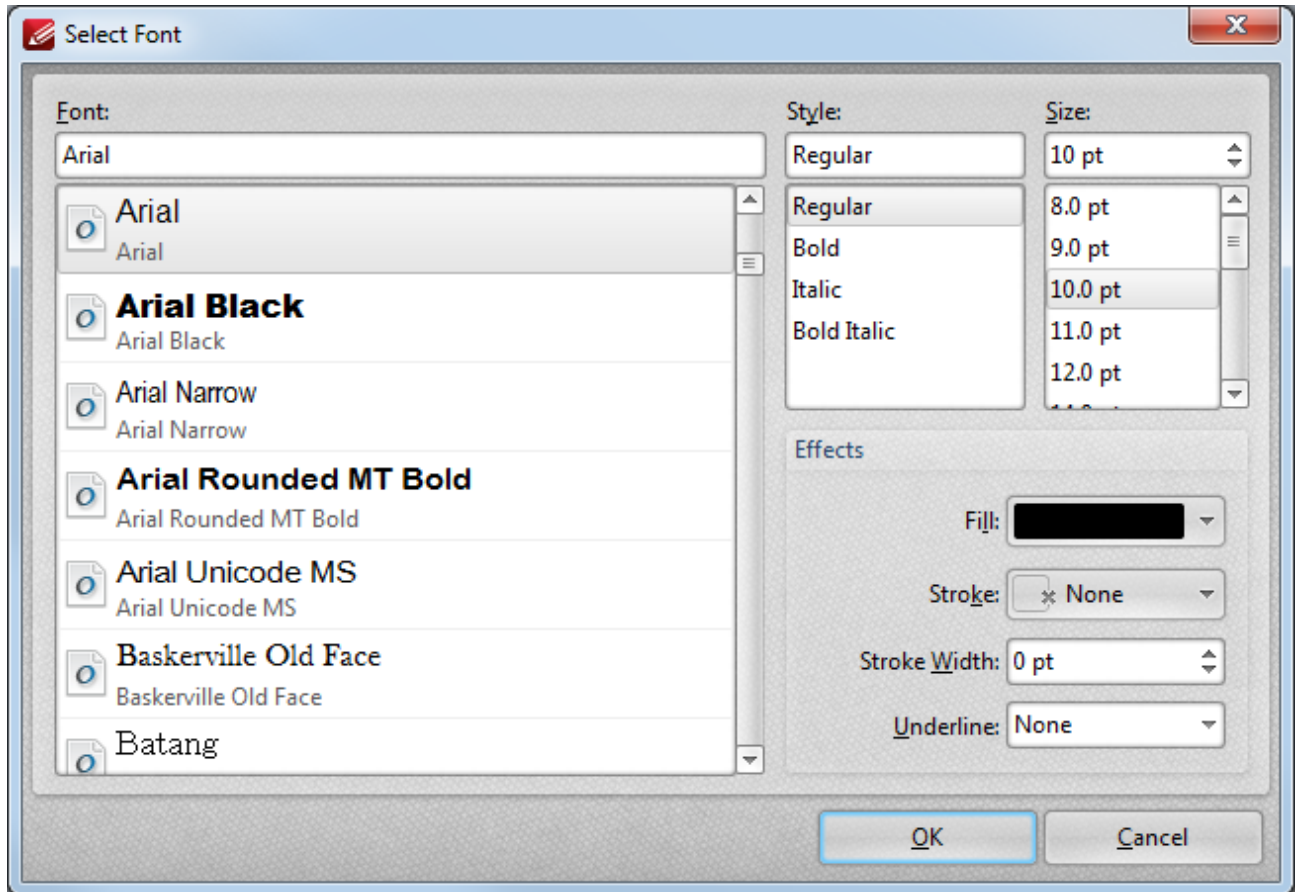
Figure 6. Select Font Dialog Box

- 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

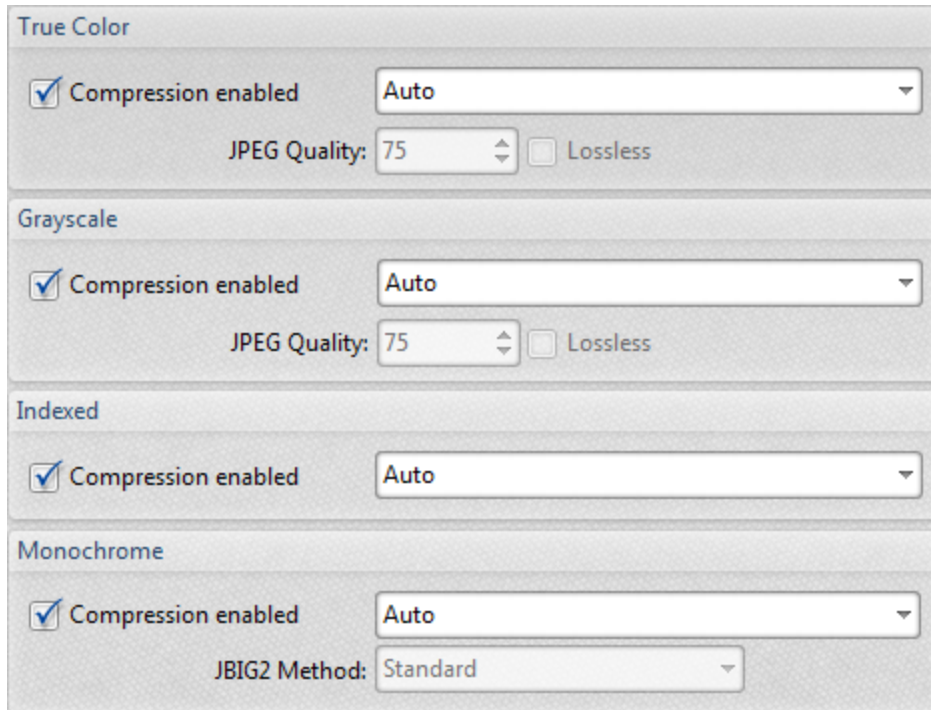When this option is selected in the **Categories** menu the following dialog box opens:
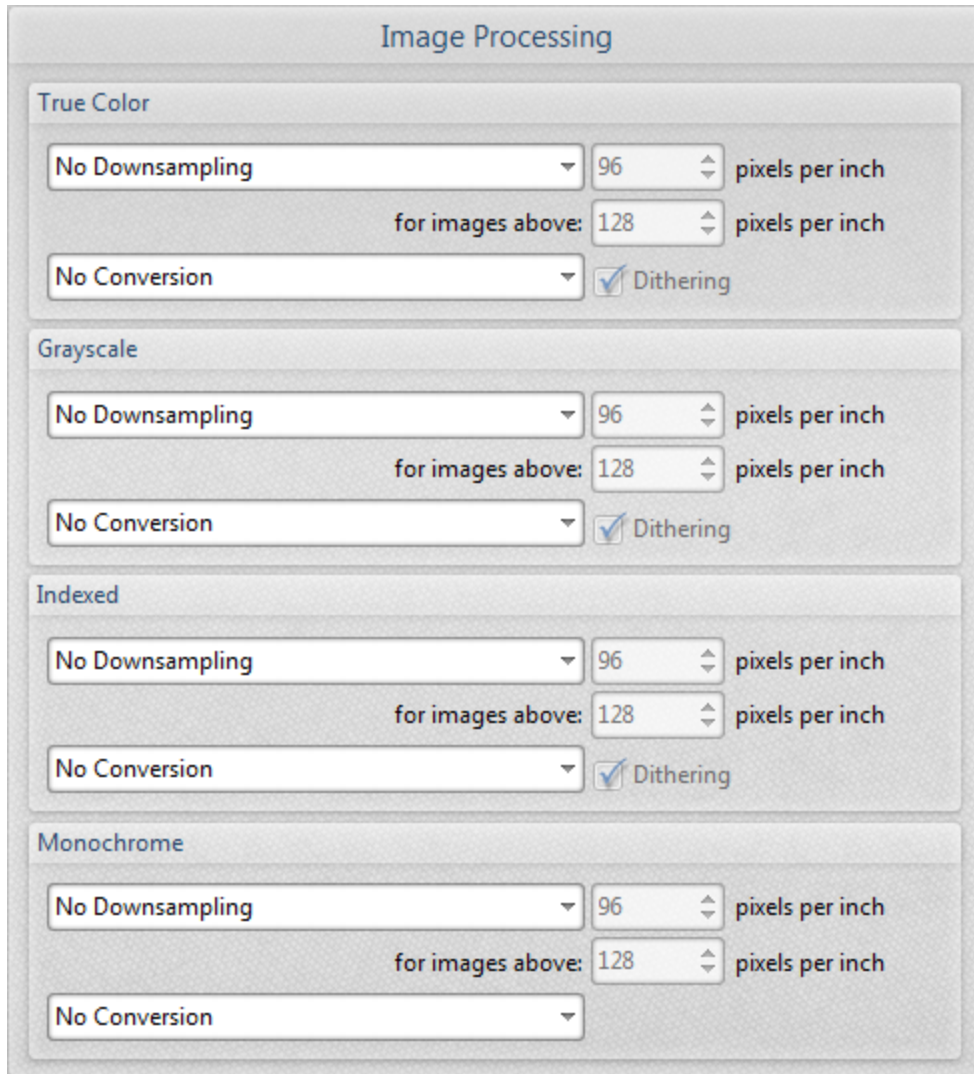
Figure 7. Image Processing Dialog Box

- 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 dialog box opens:

**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 dialog box opens:
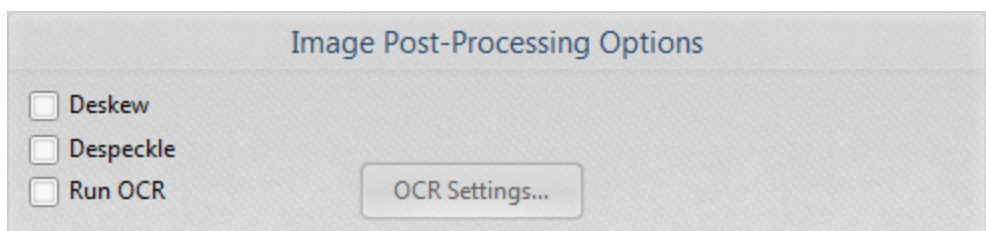
Figure 9. Image Post-Processing Options Dialog Box

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

6.1.4.7 From Scanner

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

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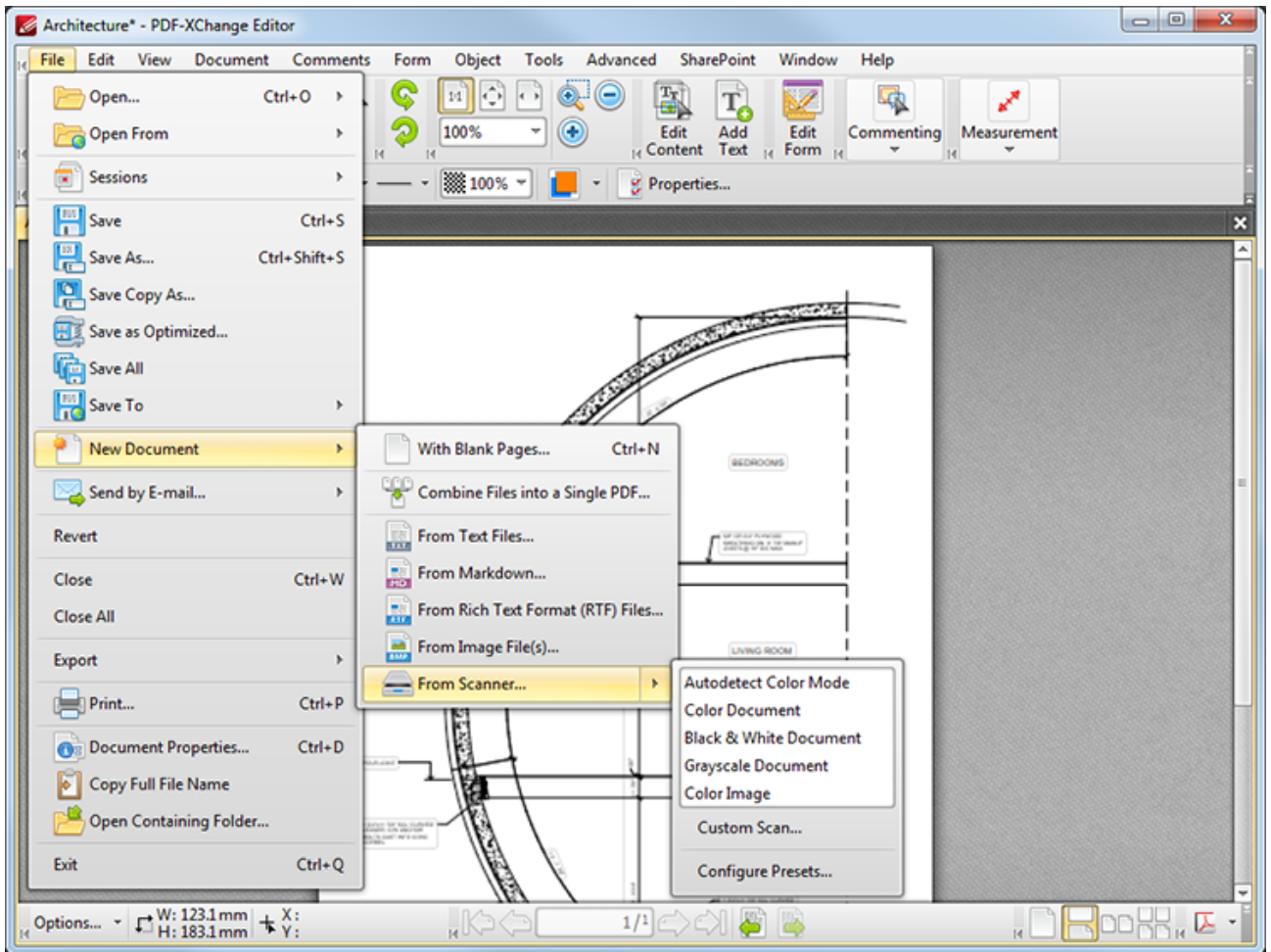
Figure 1. New Document Submenu. From Scanner Options

- Preset options are displayed in the white area. Click these options to create a new document according to preset parameters.
- Click **Configure Presets** to determine preset parameters for each mode. See **here** [281] for further information.

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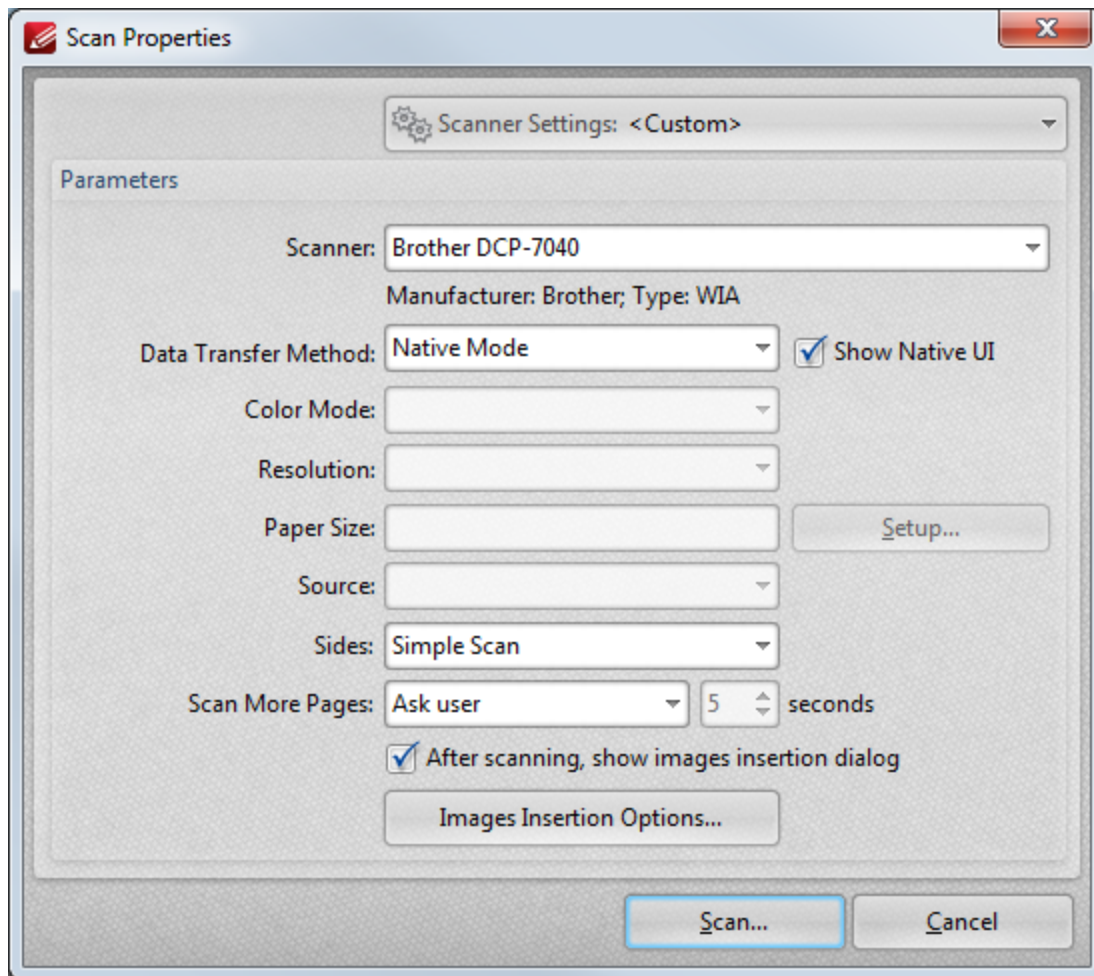
Figure 2. Scan Properties Dialog Box

- 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.** 178

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:
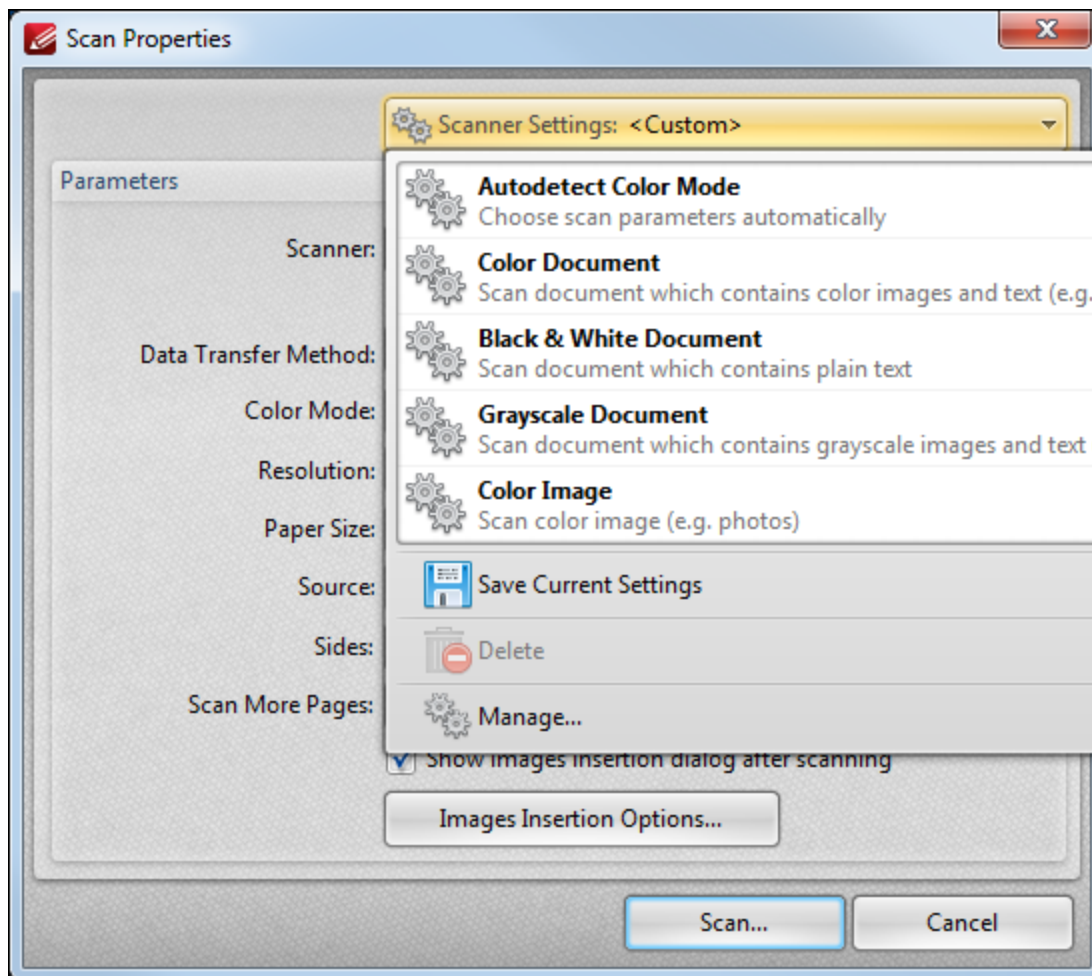
Figure 3. Scanner Settings Options

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

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

6.1.5   **Send by E-mail**

Send by E-mail

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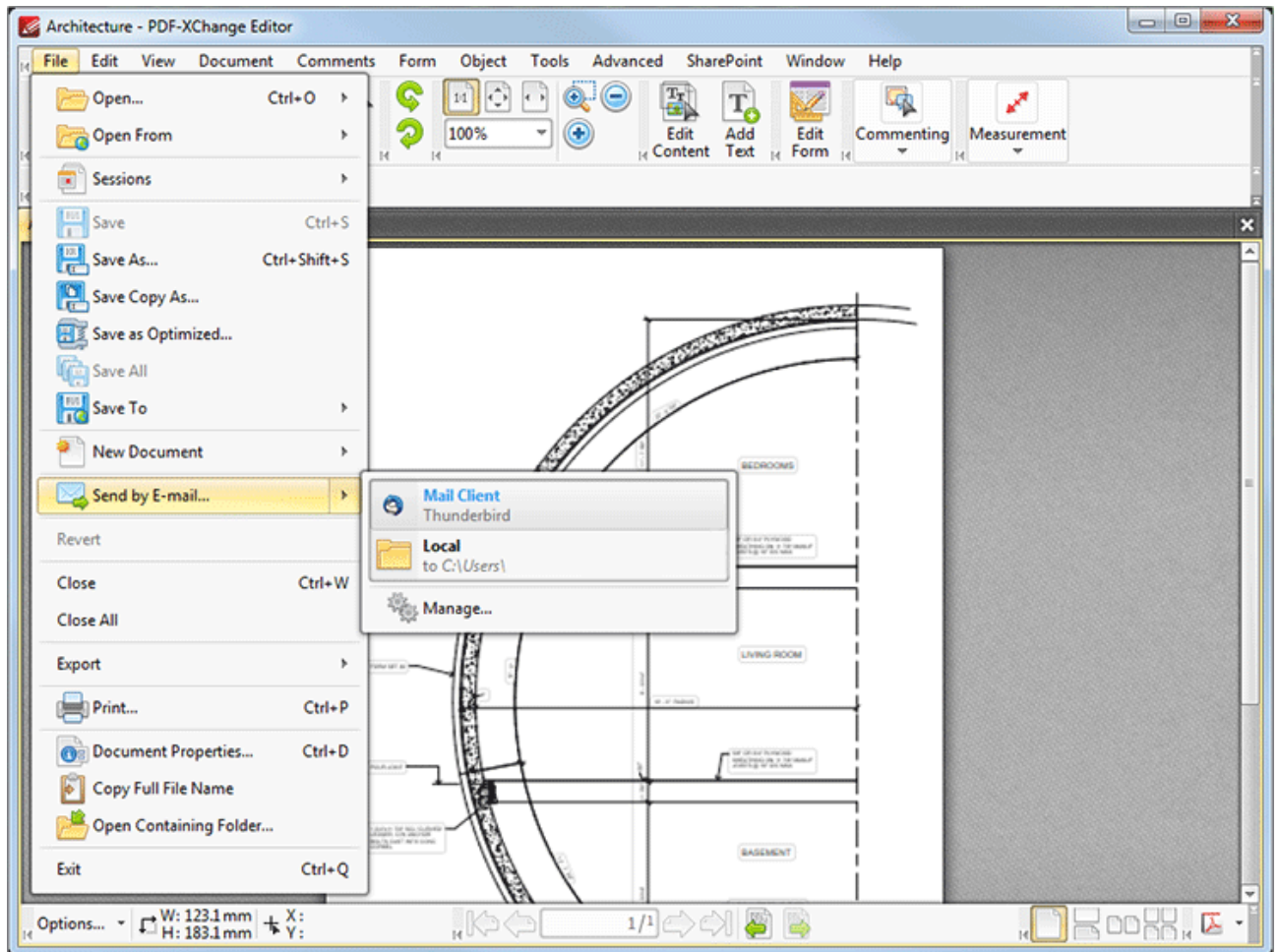
Figure 1. File Tab Submenu. Send by E-Mail Options

- 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.** 285

6.1.6 **Revert**

Revert

Click **Revert** to undo changes that have not been saved.

6.1.7 **Close**

Close

Click **Close** to close documents.

6.1.8 **Close All**

Close All

Click **Close All** to close all open documents.

6.1.9 **Export**

Export

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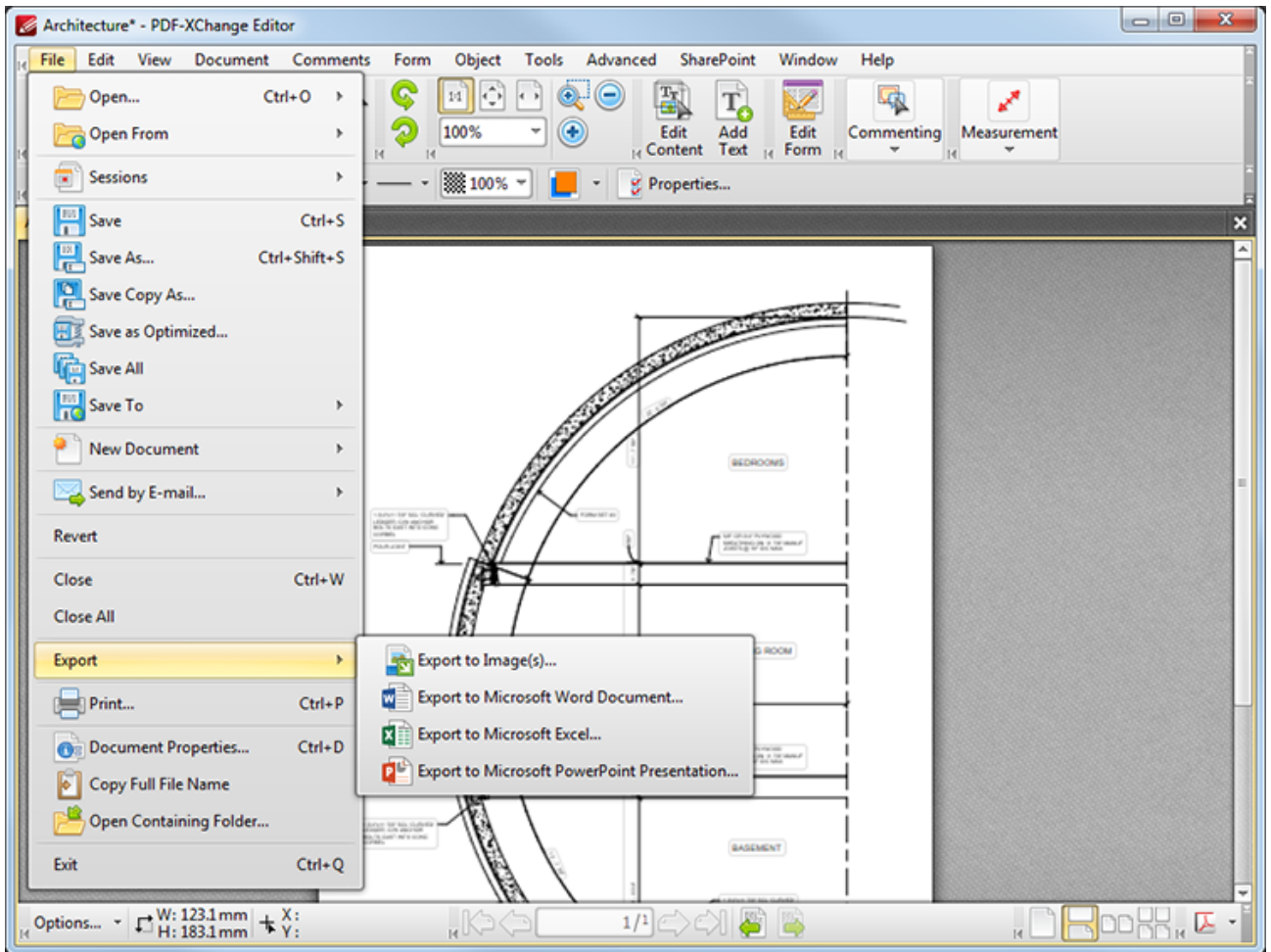
Figure 1. File Tab Submenu. Export Options

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

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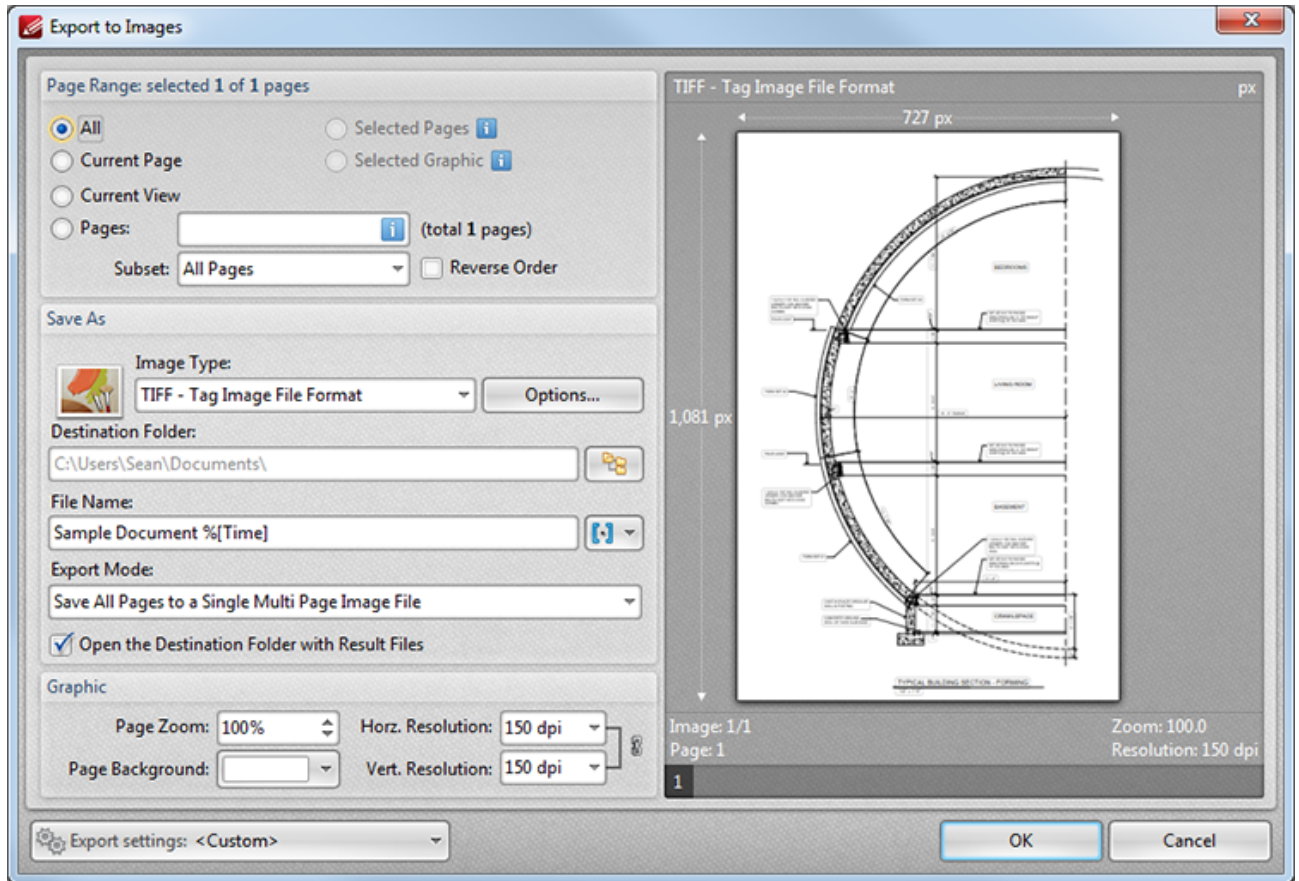
Figure 2. Export to Images Dialog Box

- Use the **Pages Range** options to select the pages that will be exported. The following options are available:
    - Click **All** to export the entire document.
    - Click **Current Page** to export only the page that is currently being viewed.
    - Click **Current View** to export what is currently visible in the PDF viewer.
    - Use the **Pages** option to select specific pages or page ranges. See **here** [860] 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 **File Name** text box to enter a file name for the new document. Add **macros** [830] 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 with Result Files** box is selected by default. Clear this box to disable this function.
  - Use the **Graphic** options to determine the graphics settings:
  - **Page Zoom** increases or decreases image dimensions.
  - The **Resolution** boxes determine the horizontal and vertical resolution of images. The ratio is constrained by default. Click the chain icon to disable this setting.
  - The **Page Background** setting determines the color of the background in the new document.

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

Click **Export to Microsoft Word Document** to export the project into **(*.docx)** format, which is intended for use with **Microsoft Word.** The **Save File** dialog box will open and the file name will be added in **(*.docx)** format automatically.

Click **Export to Microsoft Excel** to export documents into **(*.xlsx)** format, which is intended for use with **Microsoft Excel.** The **Save File** dialog box will open and the file name will be added in **(*.xlsx)** format automatically.

Click **Export to Microsoft Powerpoint Presentation** to export documents into **(*.pptx)** format, which is intended for use with **Microsoft Powerpoint.** The **Save File** dialog box will open and the file name will be added in **(*.pptx)** format automatically.

Please note that **Microsoft Office** must be installed on the local computer for these features to operate.

6.1.10 **Print**

Print

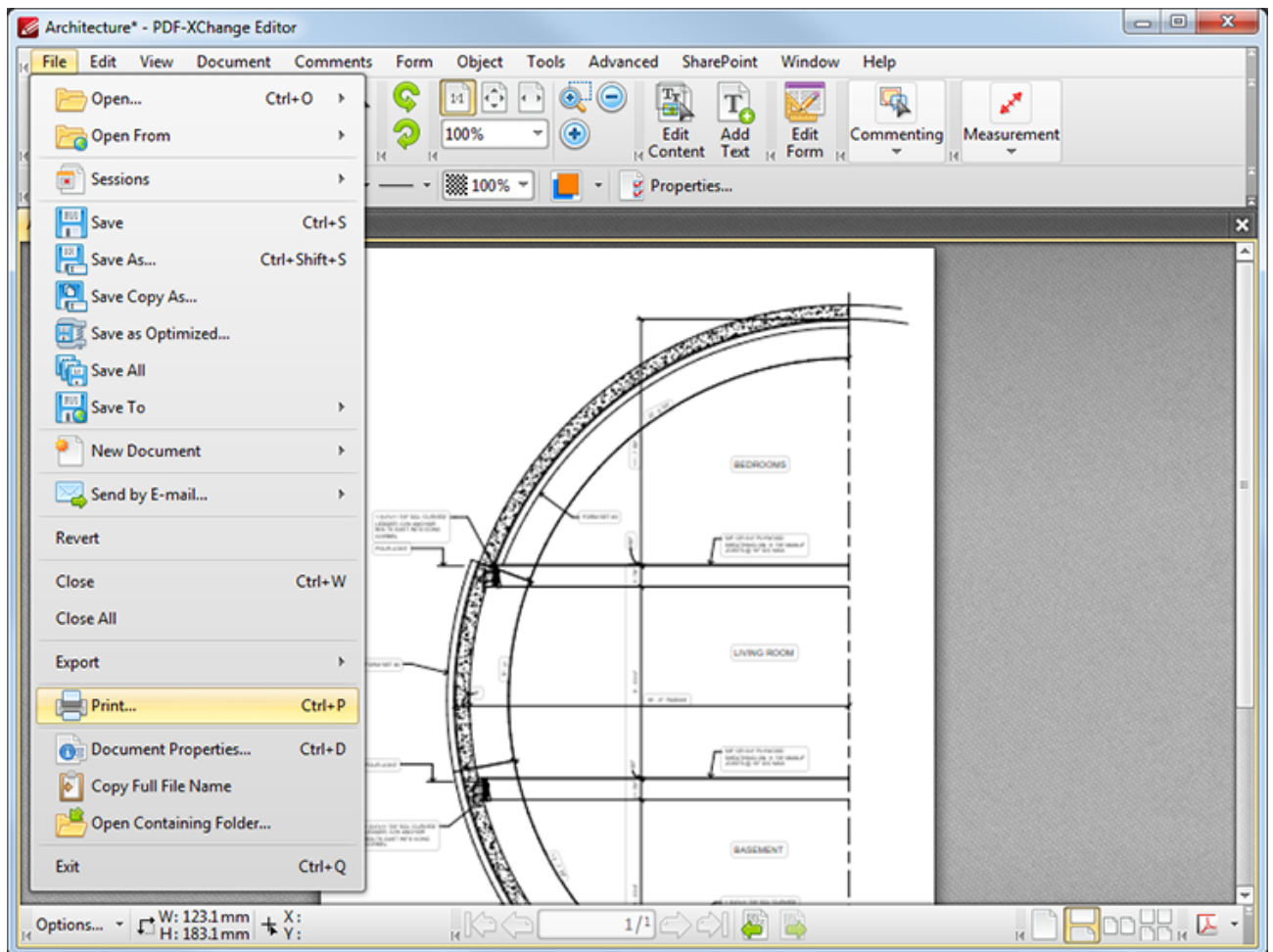Click **Print** (or press Ctrl+P) to print the current document:

Figure 1. File Tab Submenu. Print Option

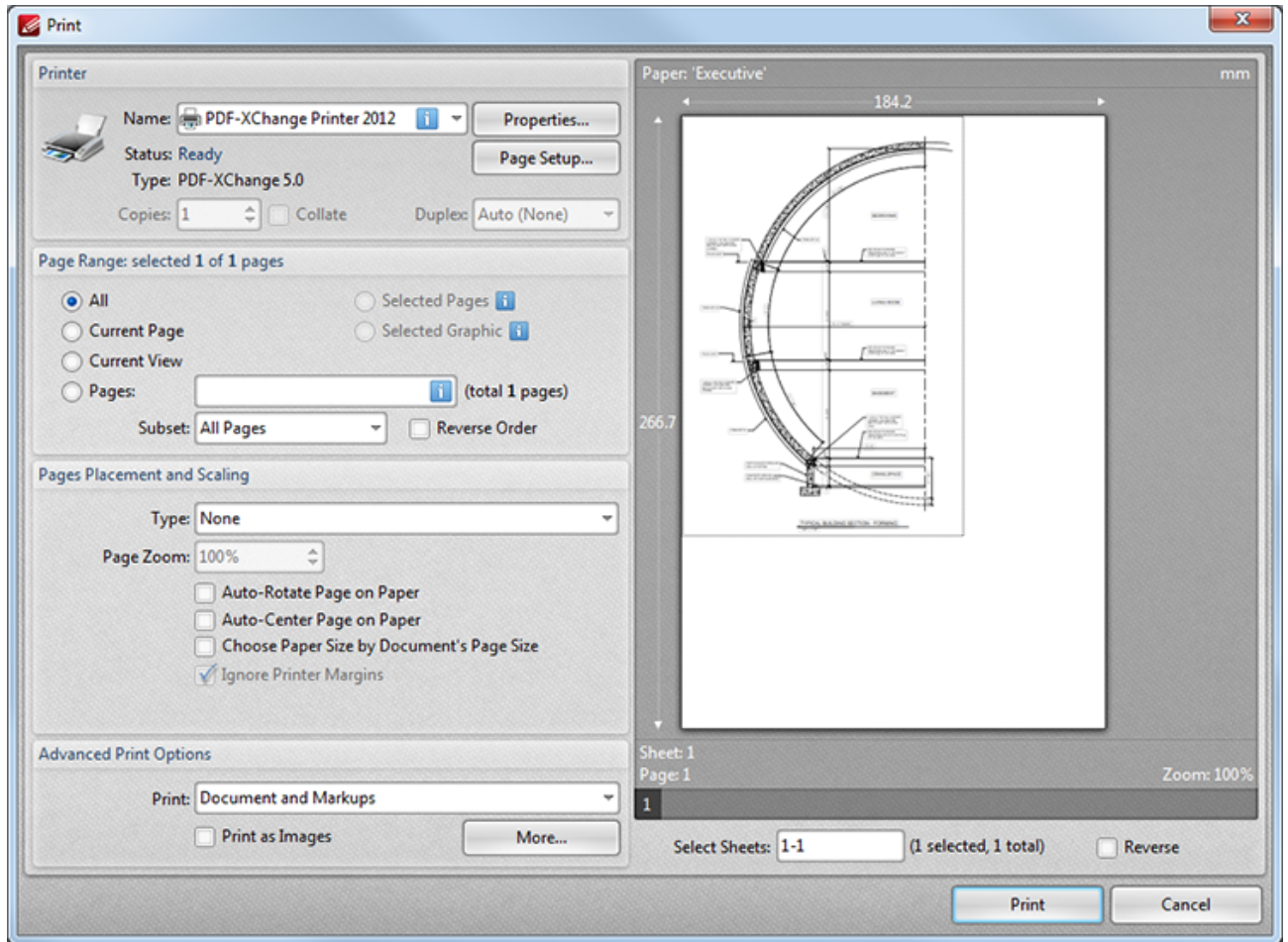The following dialog box will open:

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. See *(figure 3)* below.
  - Click the **Page Setup** button to open the **Page Setup** dialog box. See *(figure 4)* below.
- The options in the **Pages Range** section determine which pages of the document will be printed:
  - Select **All, Current Page** or **Current View**.
  - Use the **Pages** box to determine which pages of the document are printed. See **here** [860] 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 5)* 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.
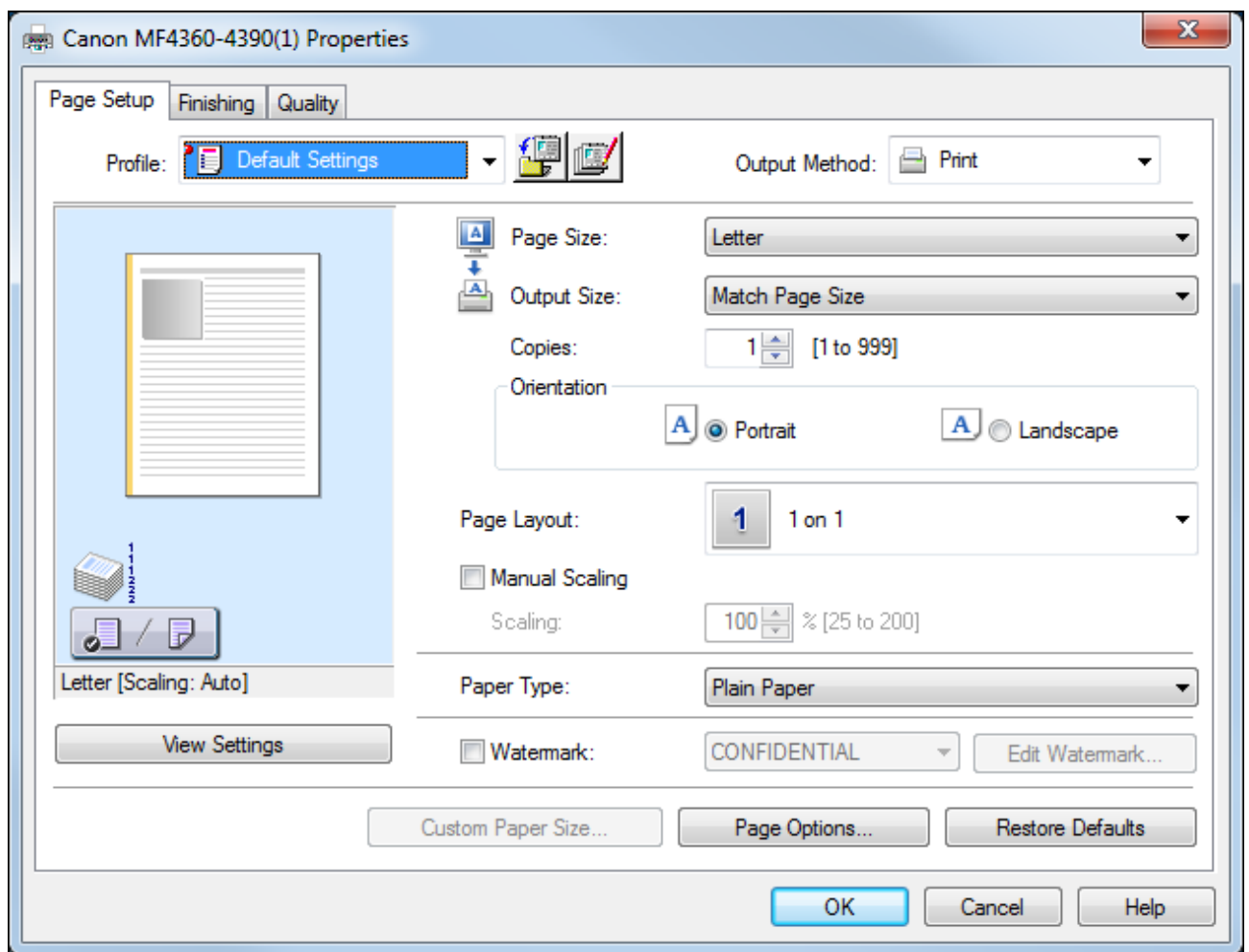
Figure 3. Properties Dialog Box

- Use the **Profile** menu to select a preset profiles. The associated format will be shown in the preview pane. Use the icons adjacent to the menu to add/edit profiles.
- Use the **Output Method** menu to select either **Print** or **Edit and Preview**.
- Select the **Page Setup** tab to determine the page setup parameters:
  - Use the **Page Size** menu to select one of the preset page sizes.

- Use the **Output Size** menu to select the output size. (The default setting is the same as that of the **Page Size** option).
- Use the **Copies** number box to select how many copies of the document are printed.
- Select either **Portrait** or **Landscape** as the orientation of the document.
- Select an option for **Page Layout.** The default setting is the standard one-on-one format. When a different layout is selected it will be reflected in the preview pane.
- Select the **Manual Scaling** box to enter a value for the manual scaling option.
- Use the **Paper Type** menu to select the paper type.
- Select the **Watermark** box to add a watermark to the document. Select a watermark from the menu. Alternatively, click **Edit Watermark** to create a new watermark.
- Select **Page Options** to determine layout options for edging and other details.
- Click **Restore Defaults** to revert to the default settings after changes have been made.
- Click **OK** to save changes.
- Click **Help** to open the **UFR II Printer Driver Help** manual.

- Select the **Finishing** tab to determine finishing options. These relate to the **Print Style, Binding Location** and **Finishing** options.
- Select the **Quality** tab to determine a preset printing mode from the **Objective** menu. Further details are available when modes are selected from the list.
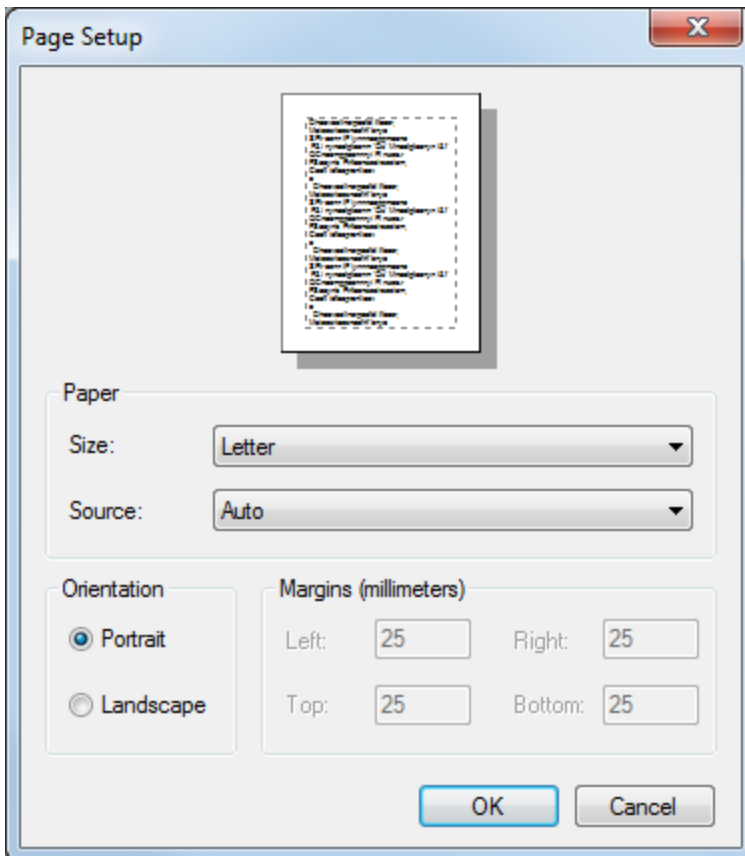
Figure 4. Page Setup Dialog Box

- 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.
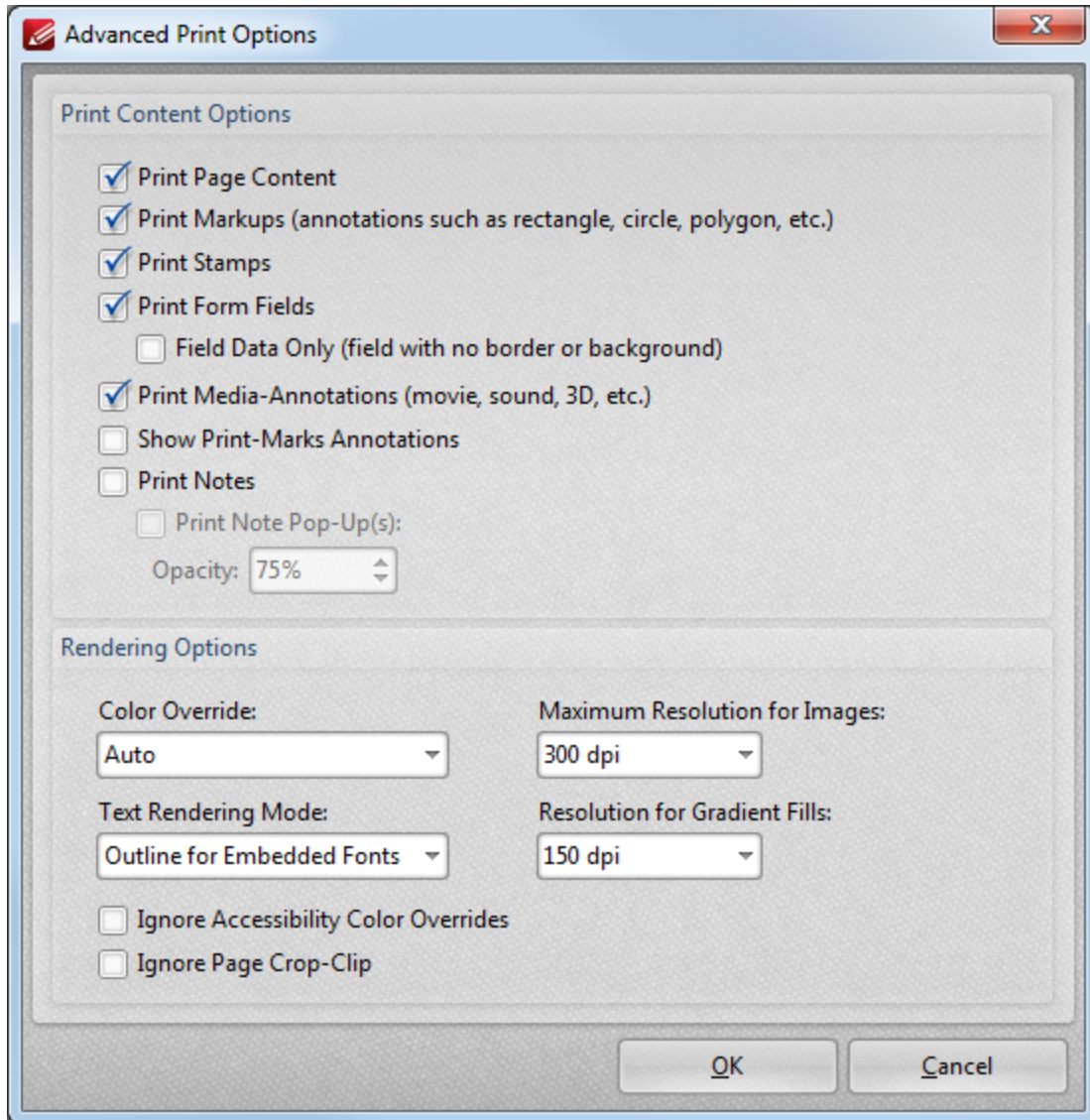
Figure 5. Advanced Print Options Dialog Box

- Use the **Print Content Options** to determine printed document content.
- Use the **Rendering Options** to determine the manner in which 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 the manner in which 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.

6.1.11 **Document Properties**

Document Properties

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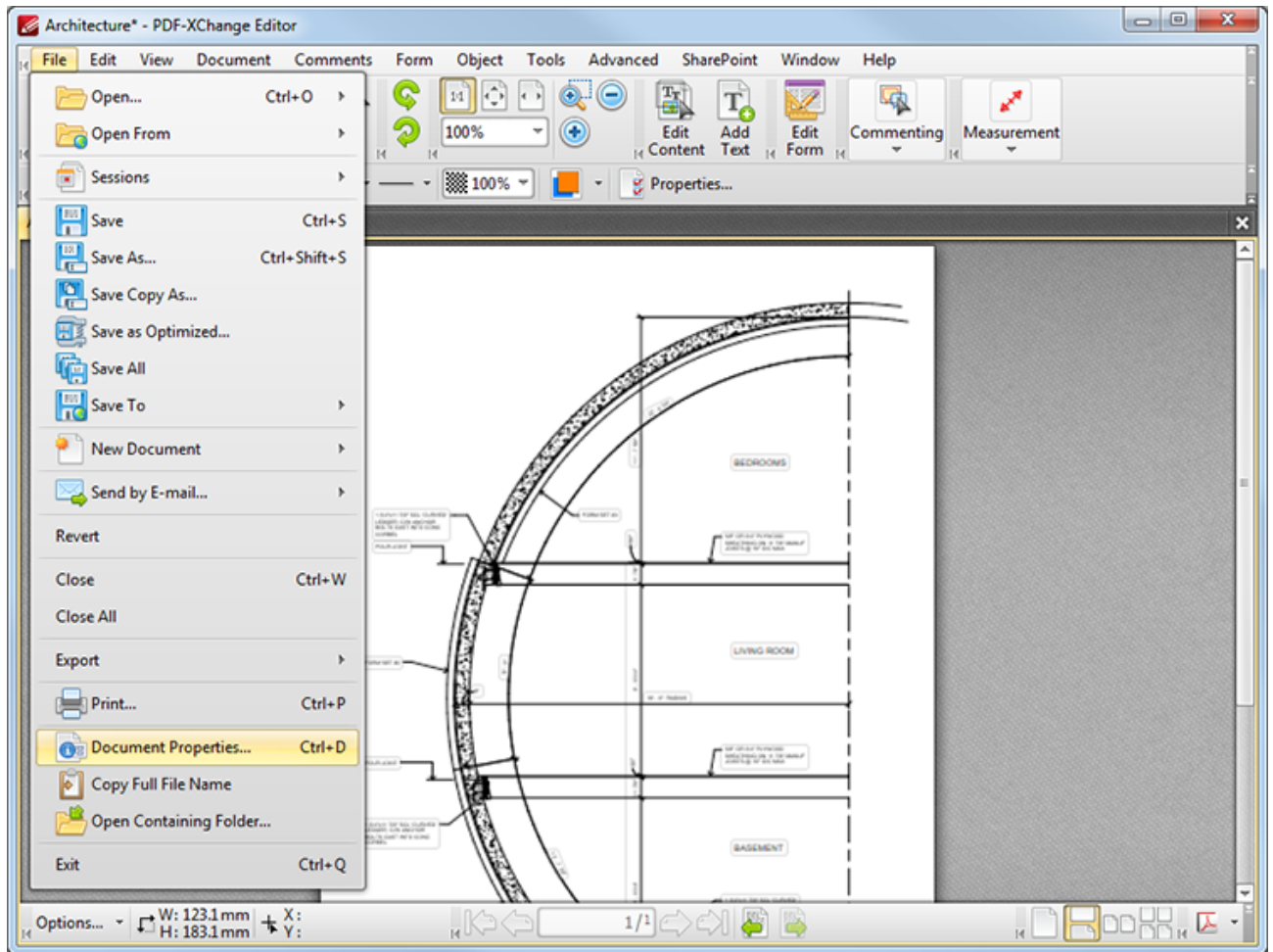
Figure 1. File Tab Submenu. Document Properties

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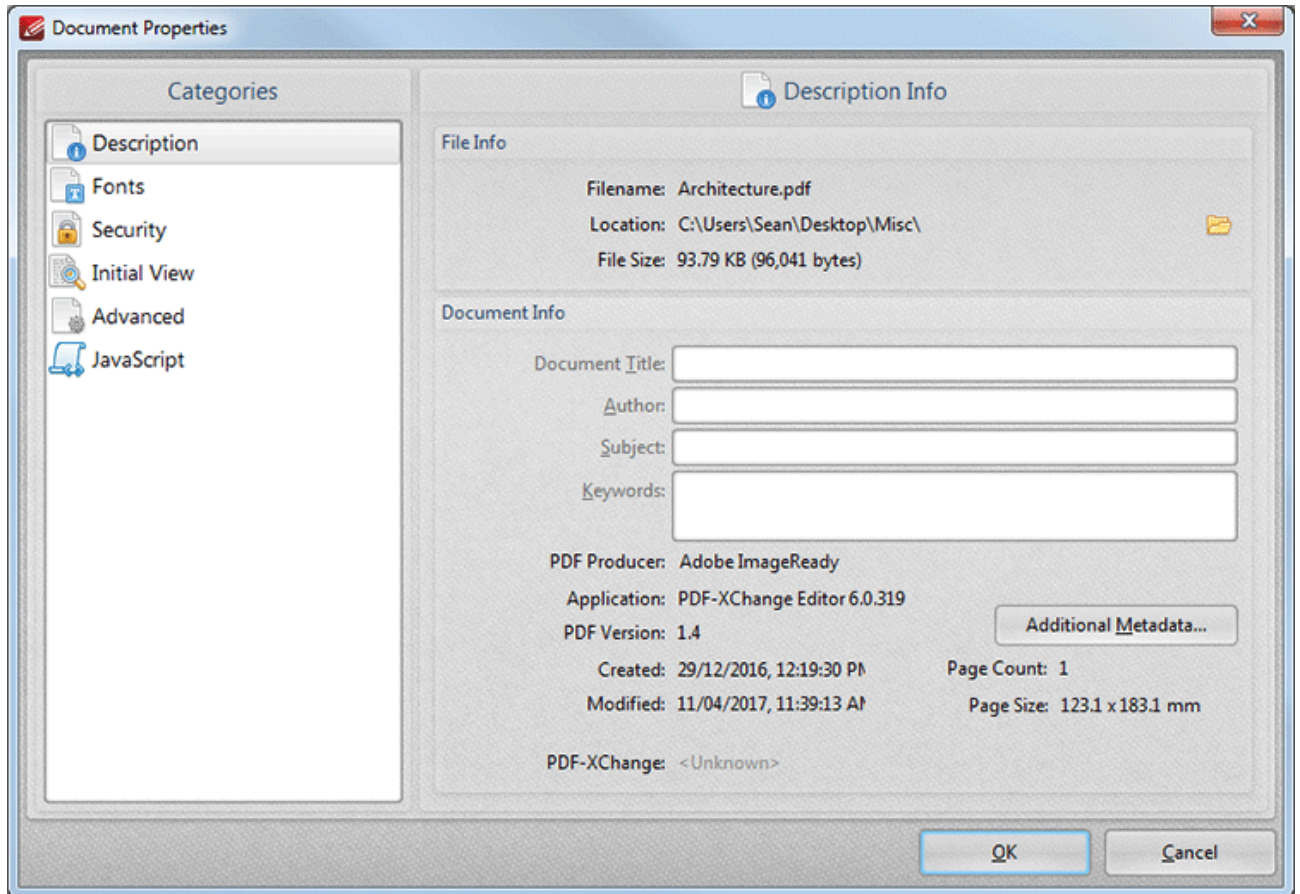
Figure 2. Document Properties Dialog Box. Description Option Selected

Please note that the keyboard shortcut Ctrl+D can also be used to launch this dialog box. Select an option from the **Categories** menu to adjust further parameters:

Description

This option shows details about the document currently selected:

- The **File Info** section contains information about the File name, location and size. Click the folder icon on the right to open the containing folder on the desktop.
- The **Document Info** section contains information about the **Document Title, Author, Subject** and **Keywords.** These can be edited using the adjacent text boxes. Further document details can be viewed beneath this section. Click the **Additional Metadata** button to view/edit additional document details:
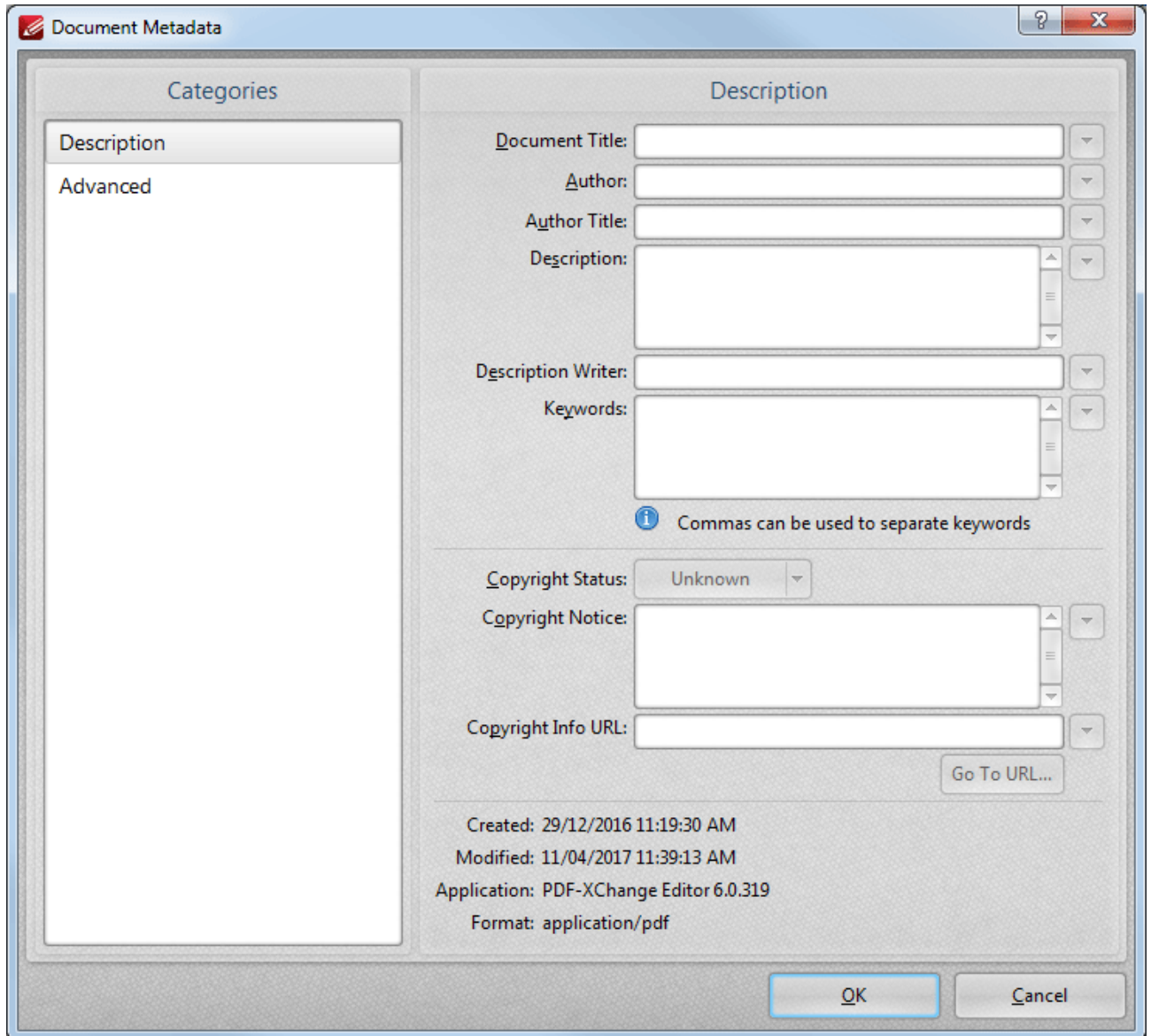
Figure 3. Document Metadata Dialog Box, Description Tab

Use the text boxes to view/edit document metadata. Click **Advanced** in the **Categories** menu to determine document metadata structure.

Fonts

This option shows details about fonts used within the document. The information displayed is read-only. The **Save as Optimized** [158] settings can be used to customize font embedding options.

Security

This option shows details about the security of the document. When it is selected the following dialog box opens:
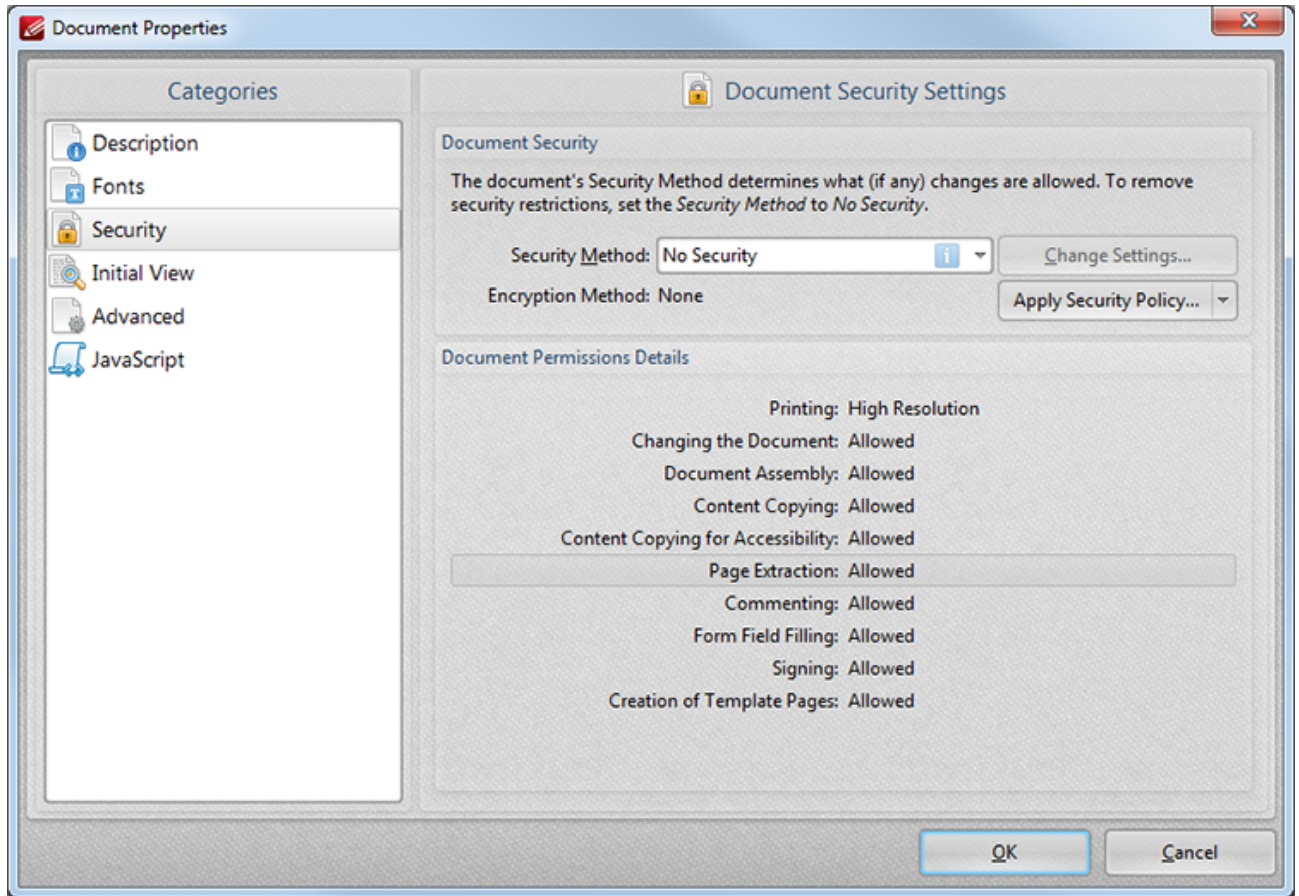
Figure 4. Document Properties Dialog Box. Security Option Selected

- 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 5)* will open.
  - The **Certificate Security** option is available only when documents feature certificate security.
  - The **FileOpen** option is available only when documents feature **FileOpen** security.
  - Click the **Apply Security Policy** button to apply a new security policy or clone/edit existing policies.
  - Additional security options are available **here.** 266

When the desired security settings have been selected, click **OK** to save.
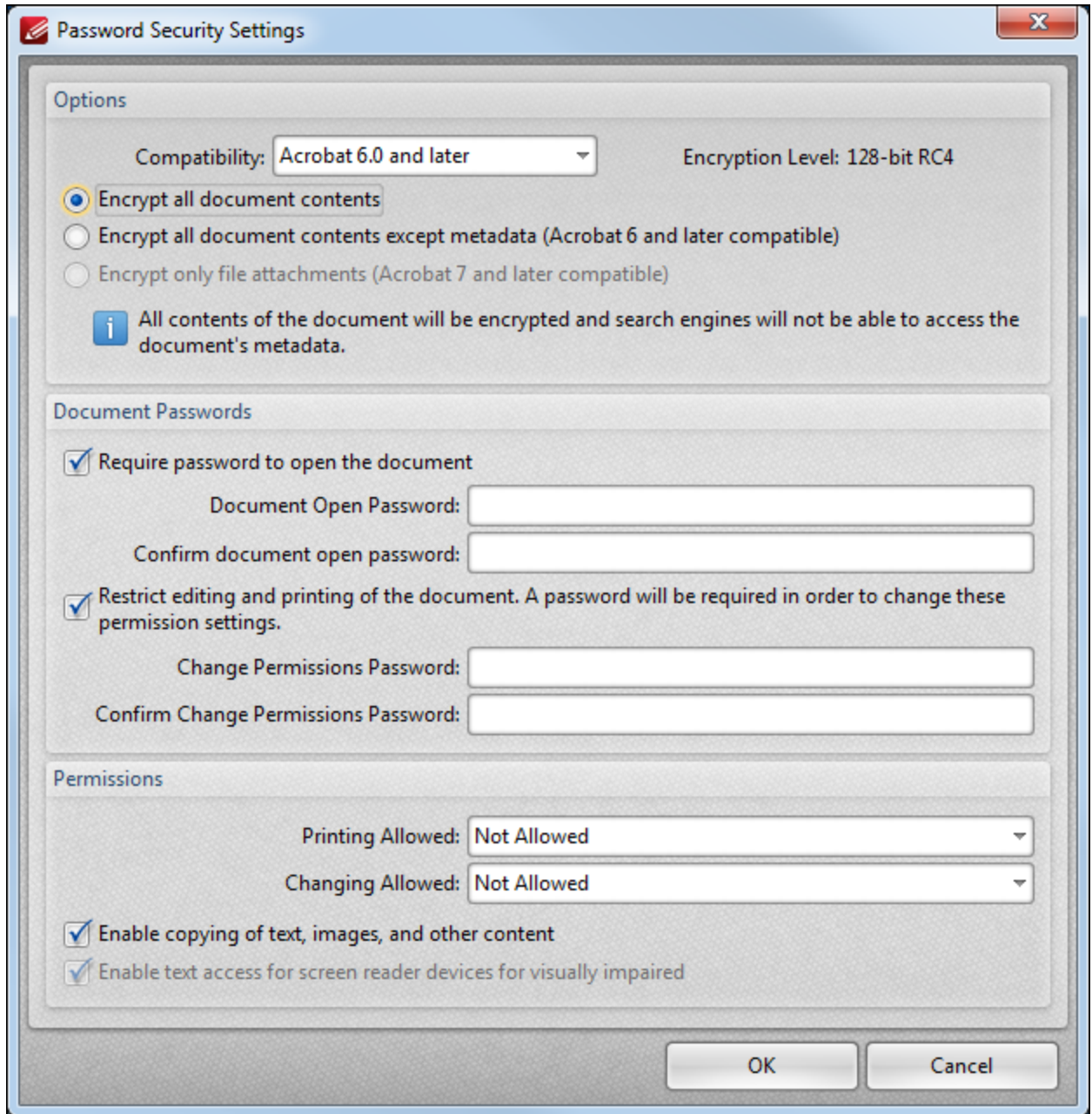
Figure 5. Password Security Settings

- Use the **Compatibility** menu to select the document security compatibility.
- Use the encryption option buttons to select the encryption settings.
- Select the **Require password to open the document** box to set a password for opening the document. Enter the password in the **Document Open Password** text box and confirm it in the text box below.
- Select the **Restrict editing and printing of the document** box to set a password for editing and printing the document. Enter the password in the **Change Permissions Password** text box and confirm it in the text box below. Use the menus in the **Permissions** section to select the settings that these passwords will enable.

Click **OK** to save settings.

Initial View

This option determines the layout of files when they are opened. When it is selected the following dialog box will open:
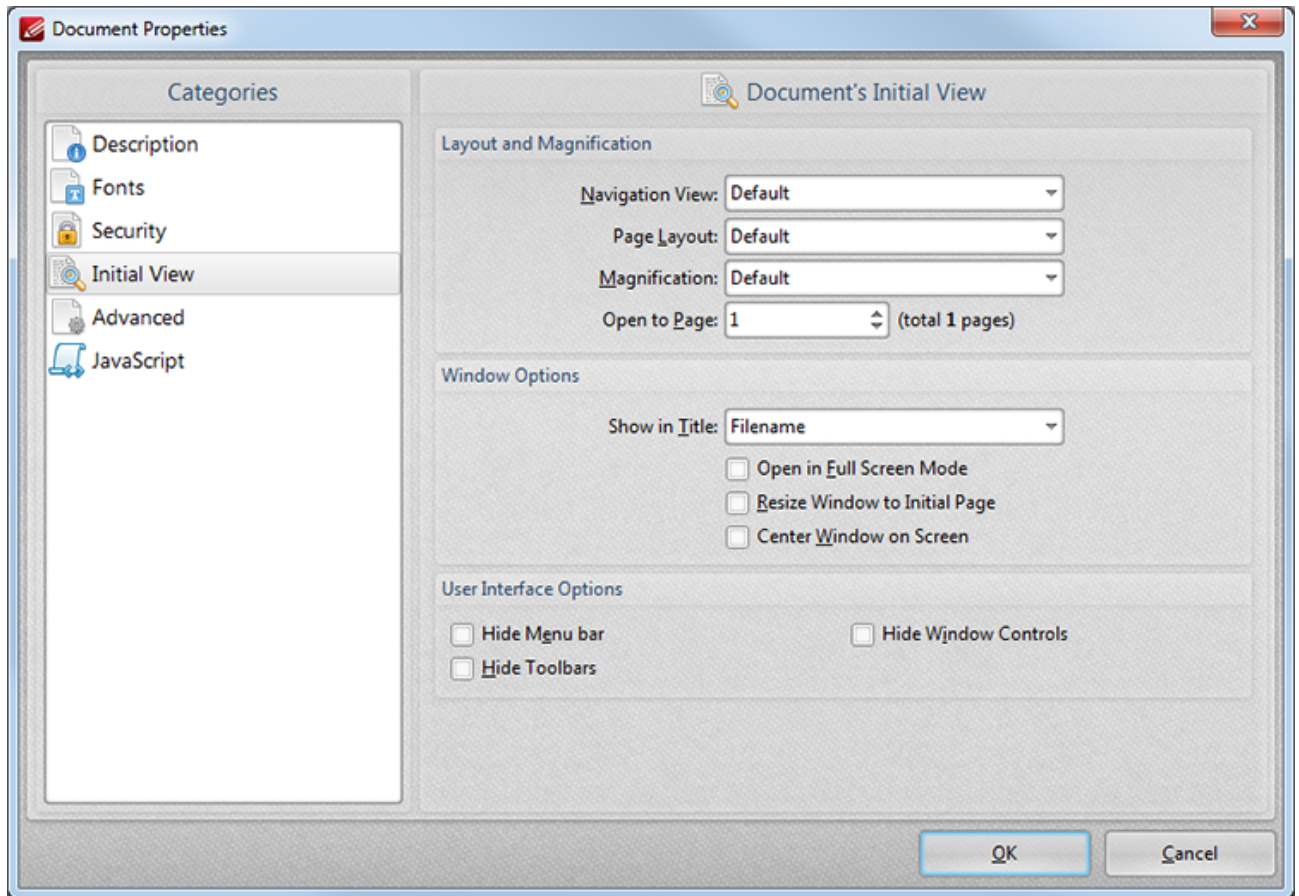
Figure 6. Document Properties Dialog Box. Initial View Option Selected

The **Layout and Magnification** settings are as follows:

- The **Navigation View** menu determines the panes that are visible when documents are opened:
  - Select **Default** to retain the default settings of the application used to open documents.
  - Select **Page Only** to view only the document itself.
  - Select **Bookmarks pane and page** to view the document and the bookmarks pane.
  - Select **Thumbnails pane and page** to view the document and the thumbnails pane.
  - Select **Layers pane and page** to view the document and the layers pane.
  - Select **Attachments pane and page** to view the document and the attachments pane.

- The **Page Layout** menu determines the page layout when documents are opened:

- Select **Default** to retain the default settings of the application used to open documents.
- Select **Single Page** to view a single page at a time.
- Select **Continuous** to view pages in a single, scrolling column.
- Select **Two Pages Continuous** to view two pages at a time in scrolling columns.
- Select **Two Pages Continuous with Cover Page** to view as above, but with a cover page included.
- Select **Two Pages** to view two pages at a time.
- Select **Two Pages with Cover Page** to view as above, but with a cover page included.

- The **Magnification** menu determines the level of zoom when documents are opened:
  - Select **Default** to retain the default settings of the application used to open documents.
  - Select **Actual Size** to view pages in their actual size. The resulting display will include resolution settings.
  - Select **Fit Page** to view the full extent of page content regardless of its size.
  - Select **Fit Width** to fit pages according to their width.
  - Select **Fit Height** to fit pages according to their height.
  - Select **Fit Visible** to view the entire page within the confines of the viewing area.
  - Select an option from the list of numerical percentages to set the magnification at the same level.

- The **Open to Page** menu determines at which page documents open.

The **Windows Options** are as follows:

- **Show in Title** determines what is shown in the document tab when documents are opened. The options are **File Name** or **Document Title.**
- Select the **Open in Full Screen Mode** box to open documents in full screen mode. This option is dependent on the capabilities of the software being used.
- Select the **Resize window to initial page** box to resize the viewing window according to the dimensions of the first page of the document in question.
- Select the **Center window on screen** box to center the viewing window on the monitor screen.

The **User Interface Options** are as follows:

- Select the **Hide Menu Bar** box to hide the **Menu Toolbar** 306 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.

The **Advanced** document settings are as follows:

- The **PDF Settings** feature two parameters:

- Enter a URL in the **Base URL** text box to specify a base URL for weblinks in documents. The option is included to simplify the management of web links to an external website. If the URL to the external site changes then 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.

- The **Print Dialog Presets** override the viewing application's default print settings with those specified within the file itself:
  - There are two options for **Page Scaling: Default** retains the default settings. **None** disables page scaling.
  - **Duplex Mode** determines the the default duplex mode for printing. Select an option from the menu.
  - Select the **Paper Size by document Page Size** box to determine the paper size of the document using the size of the pages in the document.
  - Enter the pages to be printed in the **Print Page Range** text box. See **here** 860 for further information.
  - The **Number of Copies** setting determines how many copies of the document are printed. Select an option from the menu.

- The **Reading Options** determine the direction of reading and language within the document:
  - **Binding** features the options **Left to Right** and **Right to Left.** The option selected should be the same as the reading direction of the language selected in the **Language** setting.
  - **Language** sets the language for the document.

- The **Actions** option determines when actions set within the document are executed:
  - **Before Document Close**
  - **Before Document Saving**
  - **After Document Saving**
  - **Before Document Printing**
  - **After Document Printing**
  - Use the **Edit** button to edit actions. See **here** 738 for an explanation of available actions.

Click **OK** to save settings.

JavaScript

This option details active JavaScript in the current document. Use the **Add, Edit** and **Delete** buttons to modify javaScript. The **JavaScript Console** is detailed **here.** 526

6.1.12 **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.

6.1.13 **Open Containing Folder**

Open Containing Folder

Click **Open Containing Folder** to open the containing folder of the current document.

6.2   Edit

Edit

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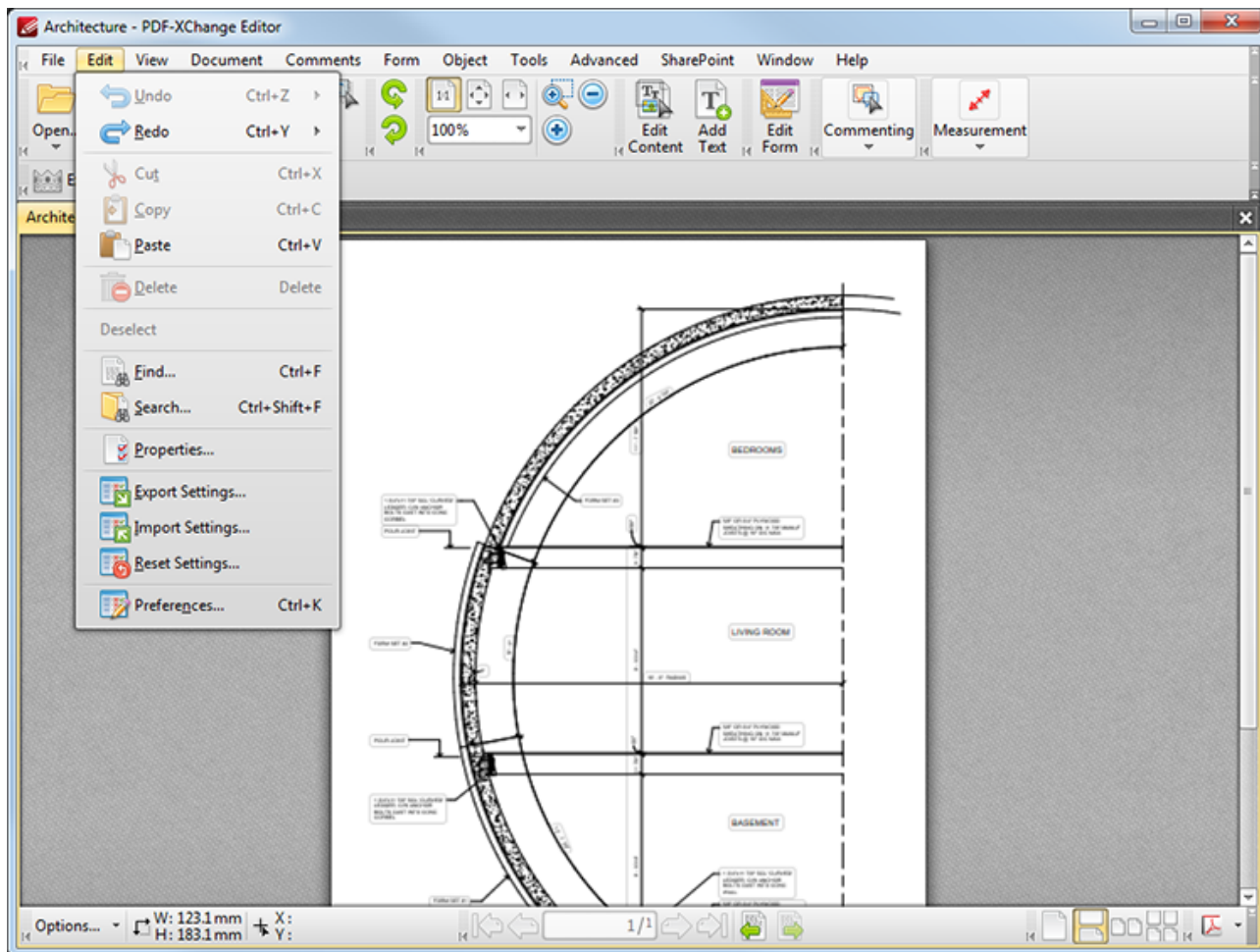
Figure 1. Edit Tab Submenu

Undo/Redo

Undo reverses the most recent action. **Redo** reverses the most recent **Undo.**

Cut, Copy and Paste

These options cut/copy the area currently highlighted from the document or paste material from the clipboard of the local computer into the current document.

Delete

This option deletes selected objects.

Click the links below for information on the remaining options:

- **Find** 217
- **Search** 219
- **Properties** 224
- **Export Settings** 226
- **Import Settings** 227
- **Reset Settings** 228
- **Preferences** 229

Additionally, see the **Document Operations Guide** 66 for further information and step-by-step instructions to using these features.

6.2.1   **Find**

Find

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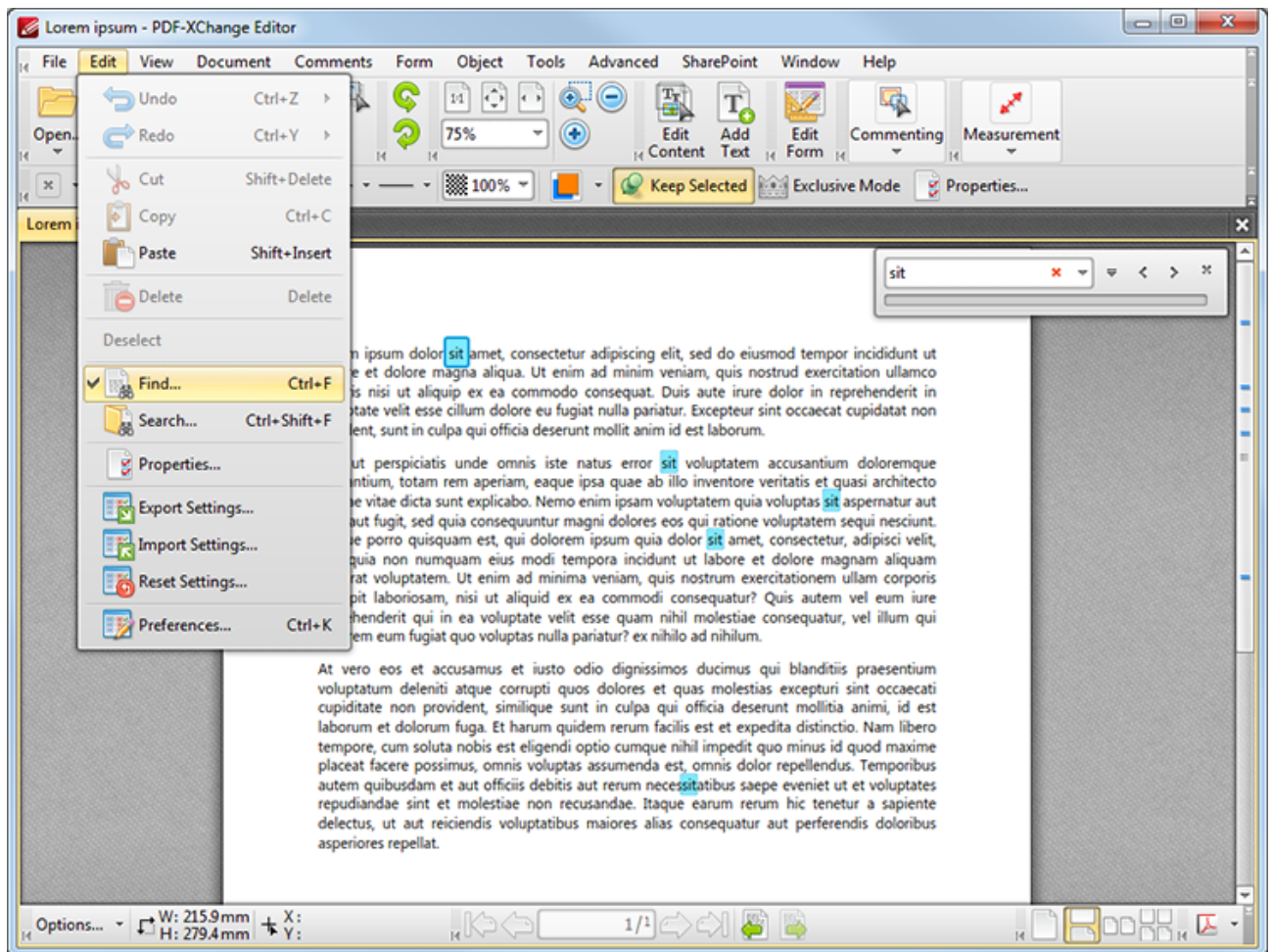
Figure 1. Edit Tab Submenu. Find Function

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. Click the red 'x' icon to reset the search.
- Use the arrow in the text box to browse previous searches that have been made.
- Use the second arrow to customize searches.
- Use the left and right arrow icons to move between matching search results after the search is complete.
- When a find function has been performed, press F3 to move to the next result and Shift+F3 to move to the previous result.

6.2.2 **Search**

 Search

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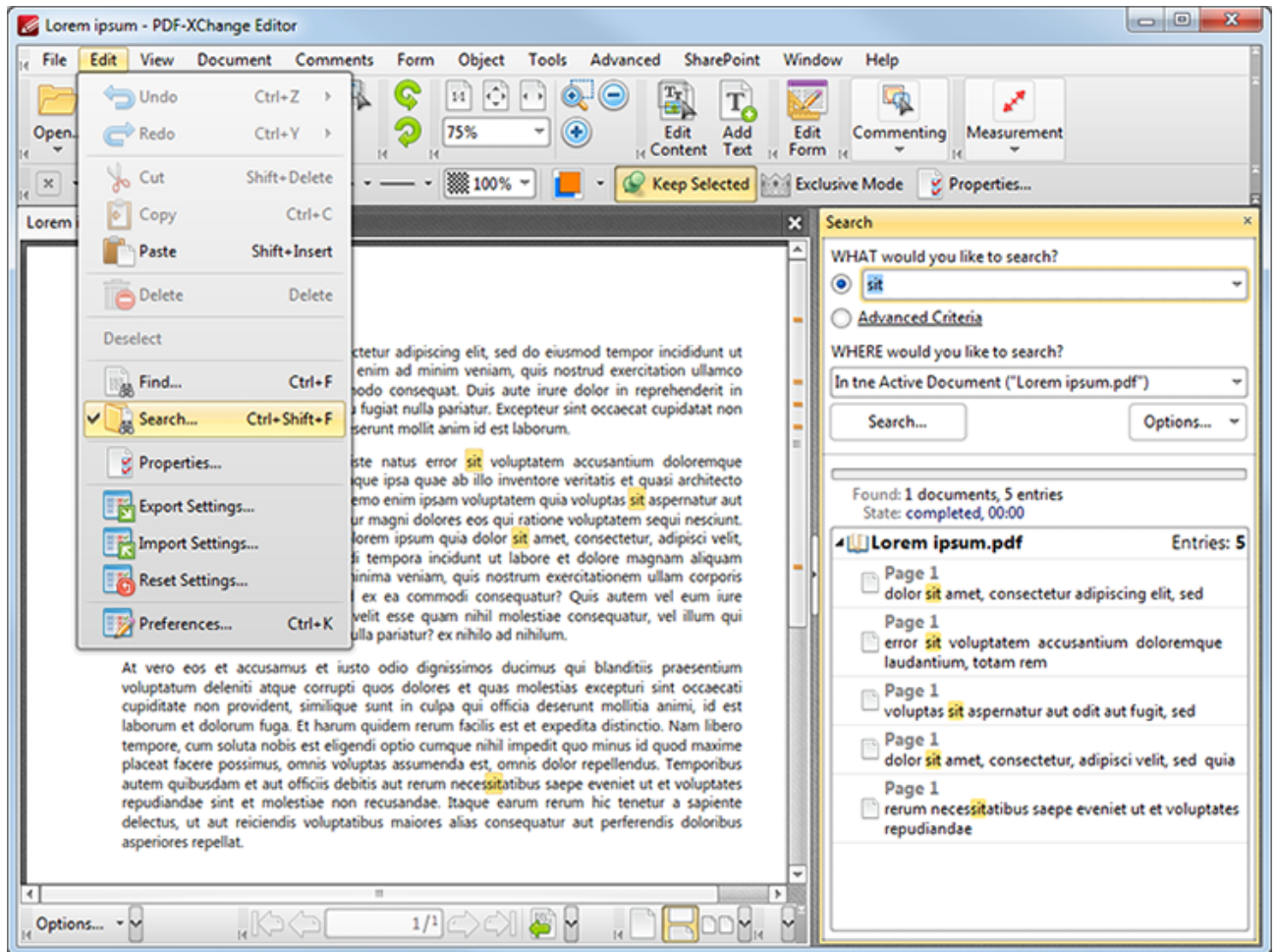
Figure 1. Edit Tab Sumbenu. Search

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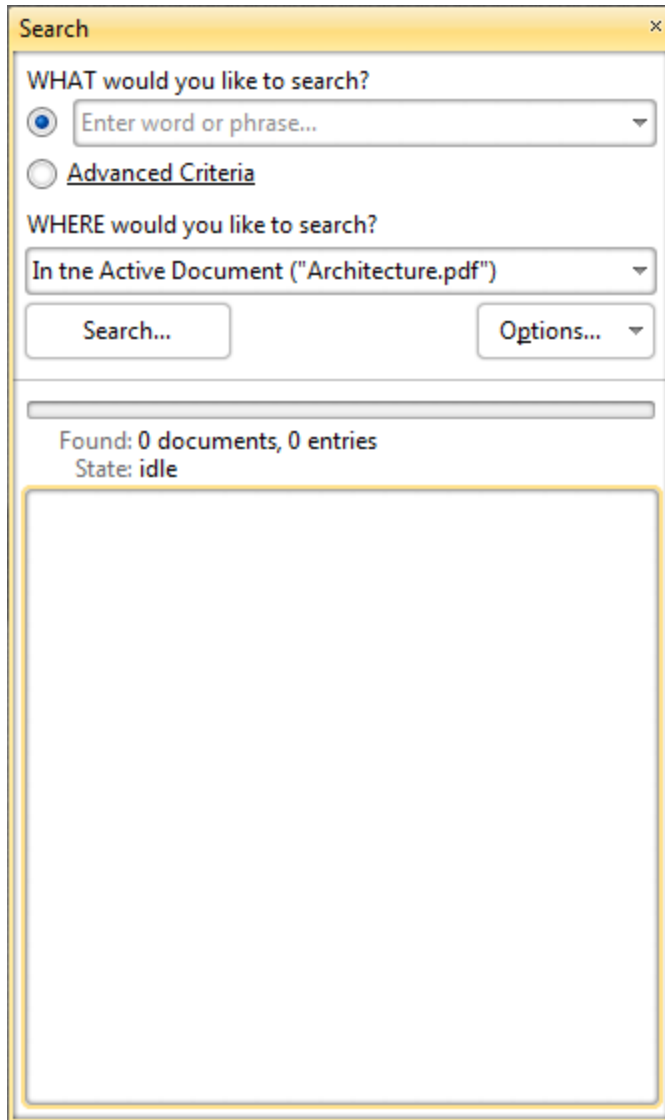
Figure 2. Search Pane

- Enter the search terms in the upper text box or select **Advanced Criterion**, which is explained below.
- Use the lower text box to select where the search will take place. The options are as follows:
  - **In active document** searches only the active document.
  - **In all opened documents** searches all documents currently open in **PDF-XChange Editor.**
  - **Browse for Folder** launches the **Select Folder** dialog box, from where it is possible to select a folder to search.
- Click the **Options** button to determine further search variables. These are explained beneath *(figure 3)* below.
- Click the **Search** button to execute the search. The results will be shown in the lower pane.

When the **Advanced Criterion** option is selected, the following pane opens:
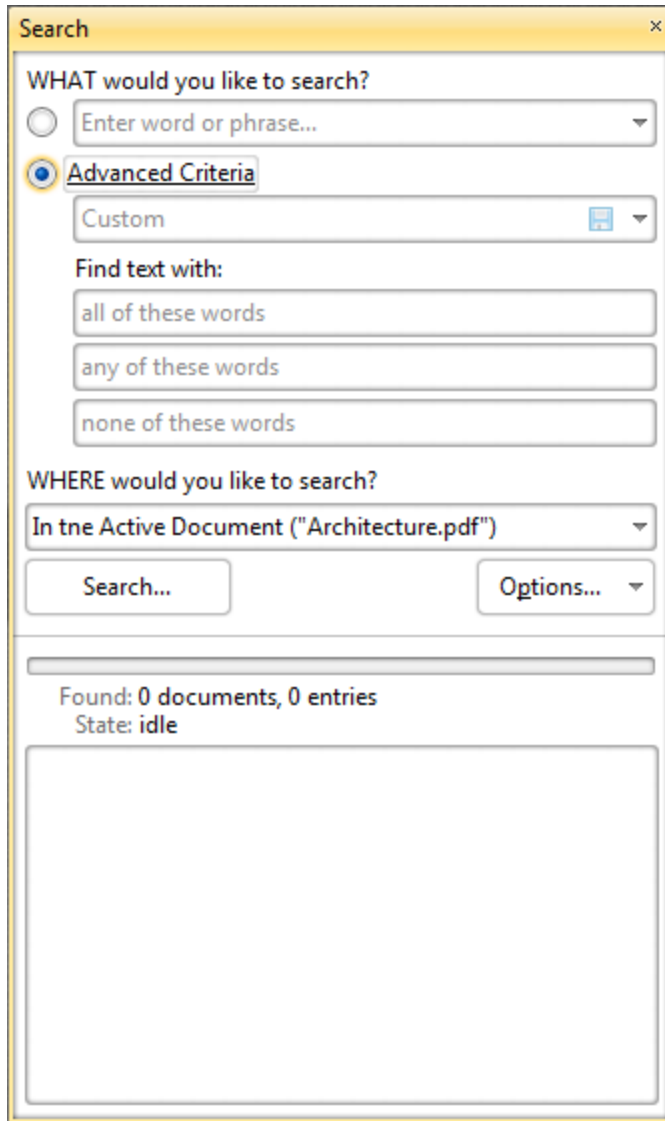
Figure 3. Advanced Criterion Options

- 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 **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.
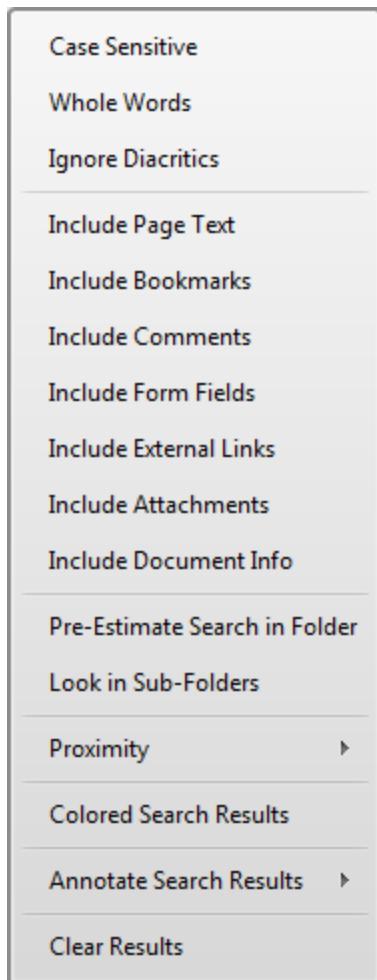
Figure 4. Search Options

- 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 the correct 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.
- Select **Annotate Search Results** for annotation options after the search has taken place. The options are:
  - **Highlight Search Results.**
  - **Underline Search Results.**
  - **Strikeout Search Results.**
  - **Redaction Search Results.**
  - Additionally, click **Comment Styles Palette** to launch the **Comment Styles Palette** 625 for further annotation options.
- Select **Clear Results** to the clear the search results list.

6.2.3   **Properties**

Properties

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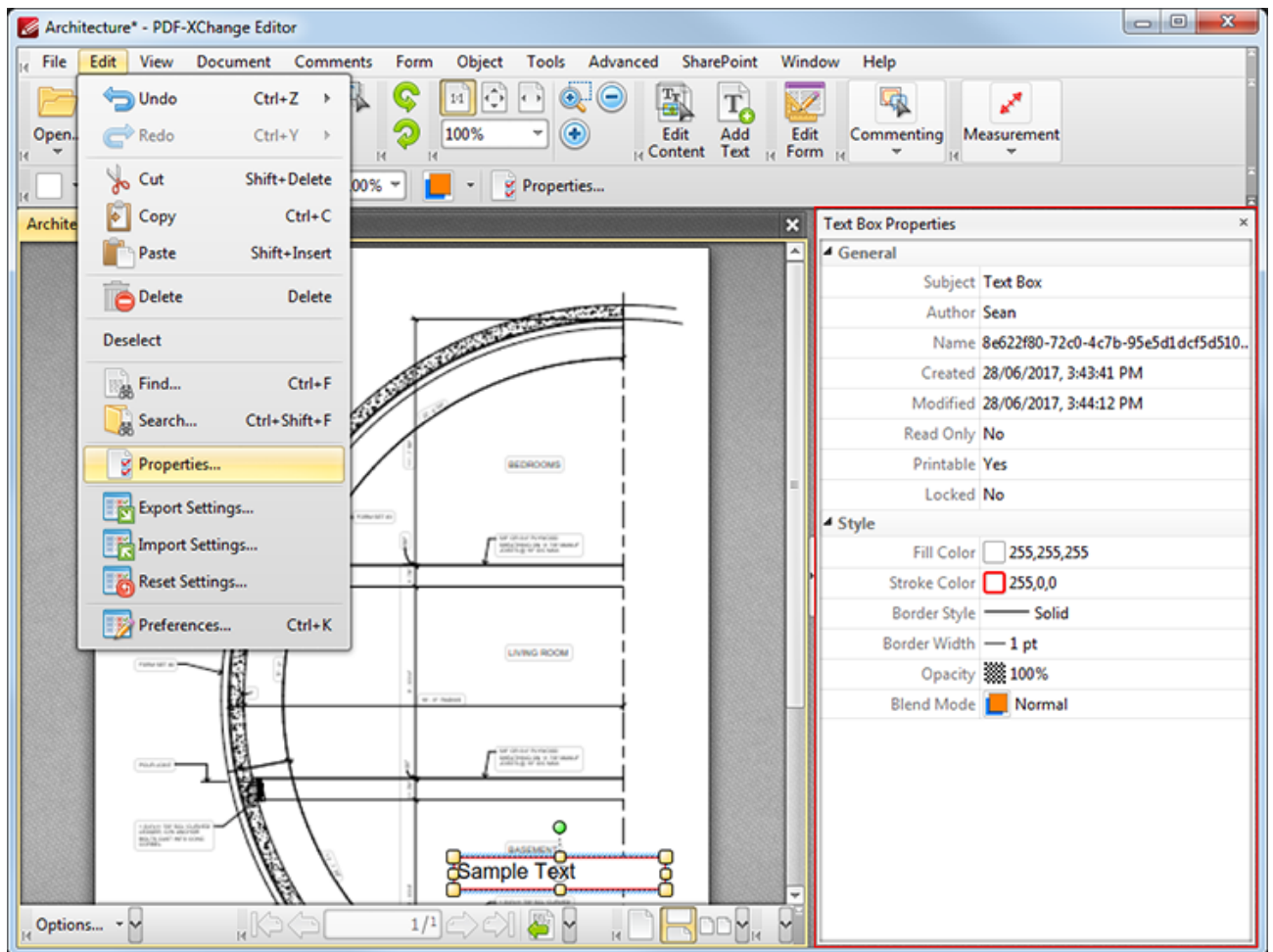
Figure 1. Edit Tab Submenu. Properties Pane

This pane displays the properties of selected content. Click properties to edit them as desired. (Please note that not all properties can be edited). Alternatively, most properties can be edited using the **Properties Toolbar.** [484]

6.2.4 **Export Settings**

![PDF-XChange Editor icon] **Export Settings**

Click **Export Settings** to export the current settings of **PDF-XChange Editor** to a data file. When it is selected, the settings that are available to export are displayed in the following dialog box:
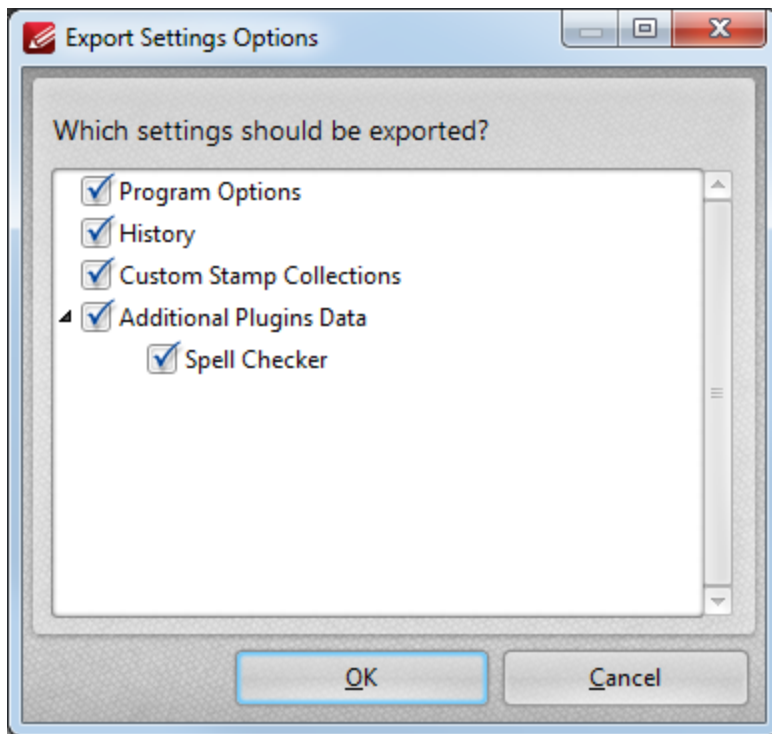
Figure 1. Export Settings Options

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

6.2.5 **Import Settings**

Import Settings

Click **Import Settings** to import saved settings. The **Import Settings from File** dialog box will open. Select the desired settings file and click **Open**. The **Import Settings Options** dialog box will open:
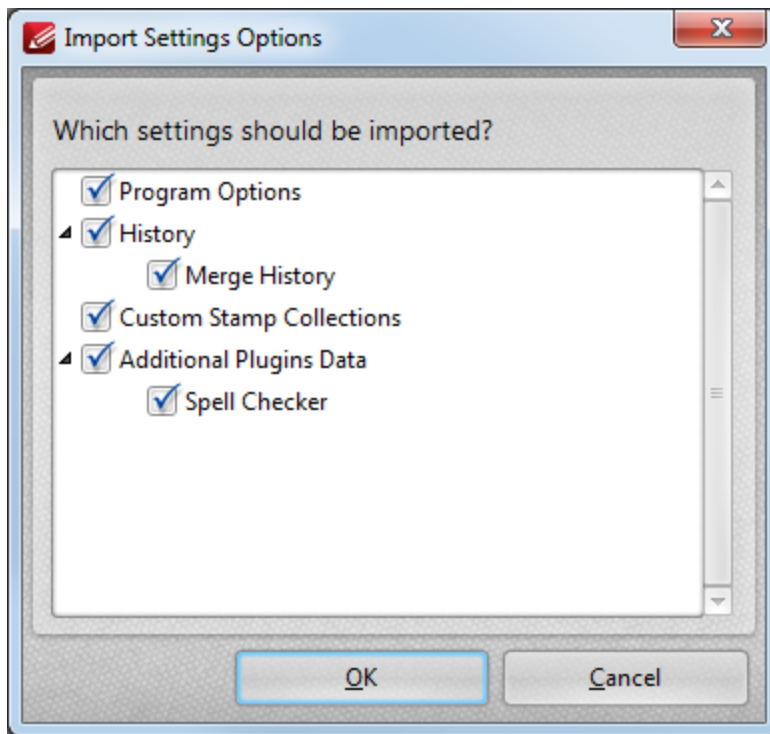
Figure 1. Import Settings Options Dialog Box

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

6.2.6   **Reset Settings**

Reset Settings

Click **Reset Settings** to revert the current settings of **PDF-XChange Editor** to their default values. The following dialog box will be displayed:
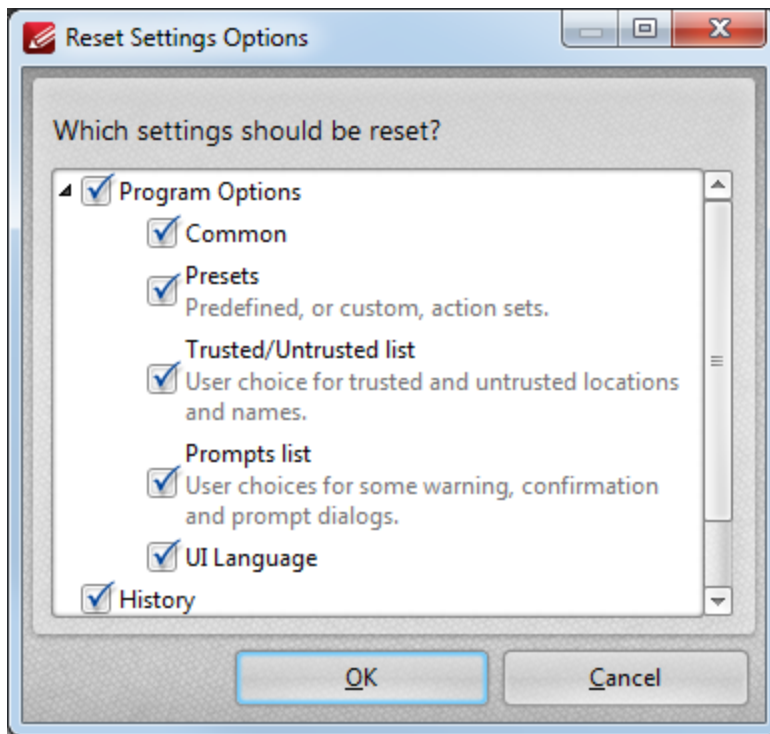
Figure 1. Reset Settings Options Dialog Box

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

6.2.7 Preferences

Preferences

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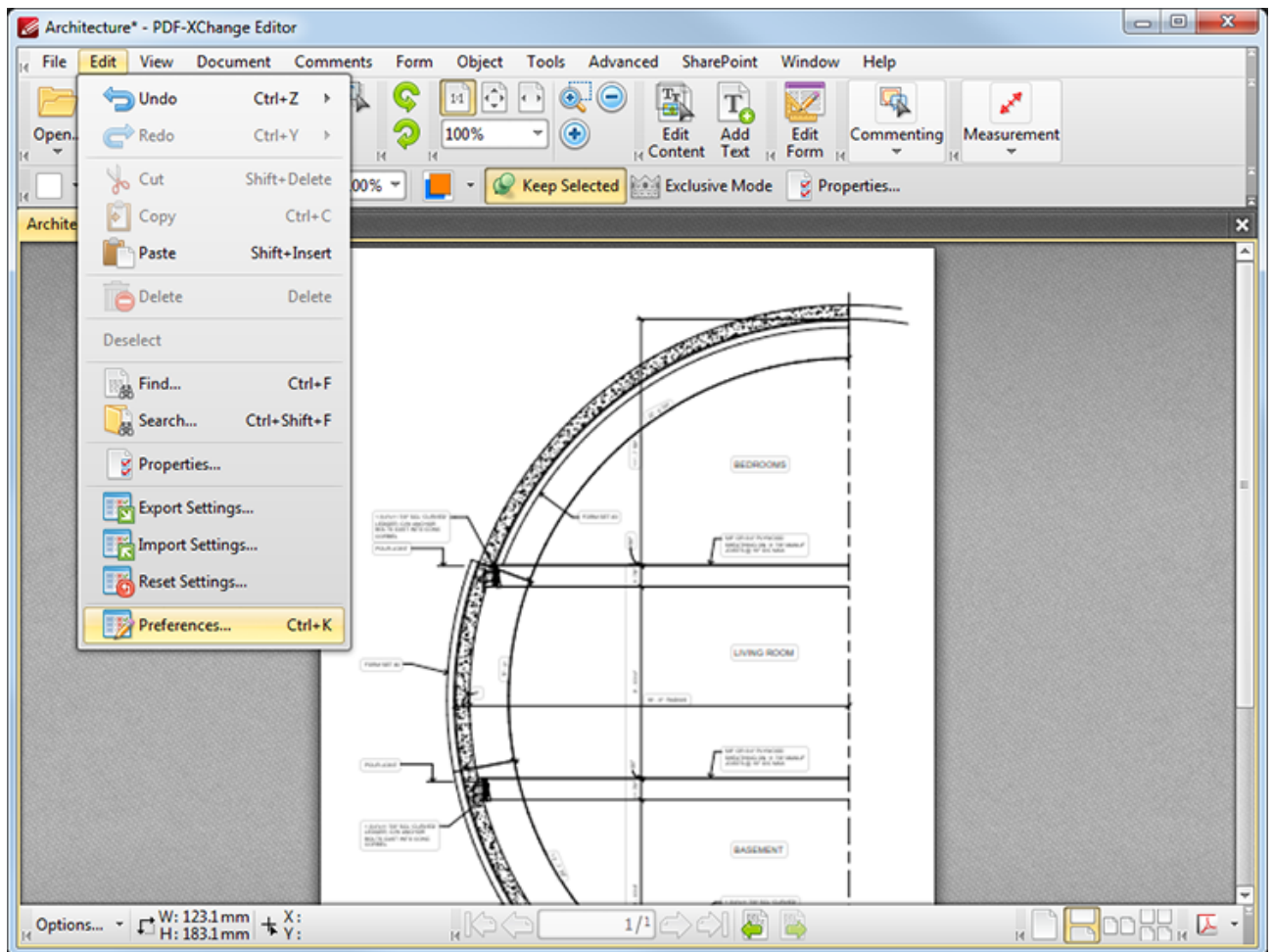
Figure 1. Edit Tab Submenu. Preferences

Use the options in the **Categories** pane to determine the settings of the associated section of the software:
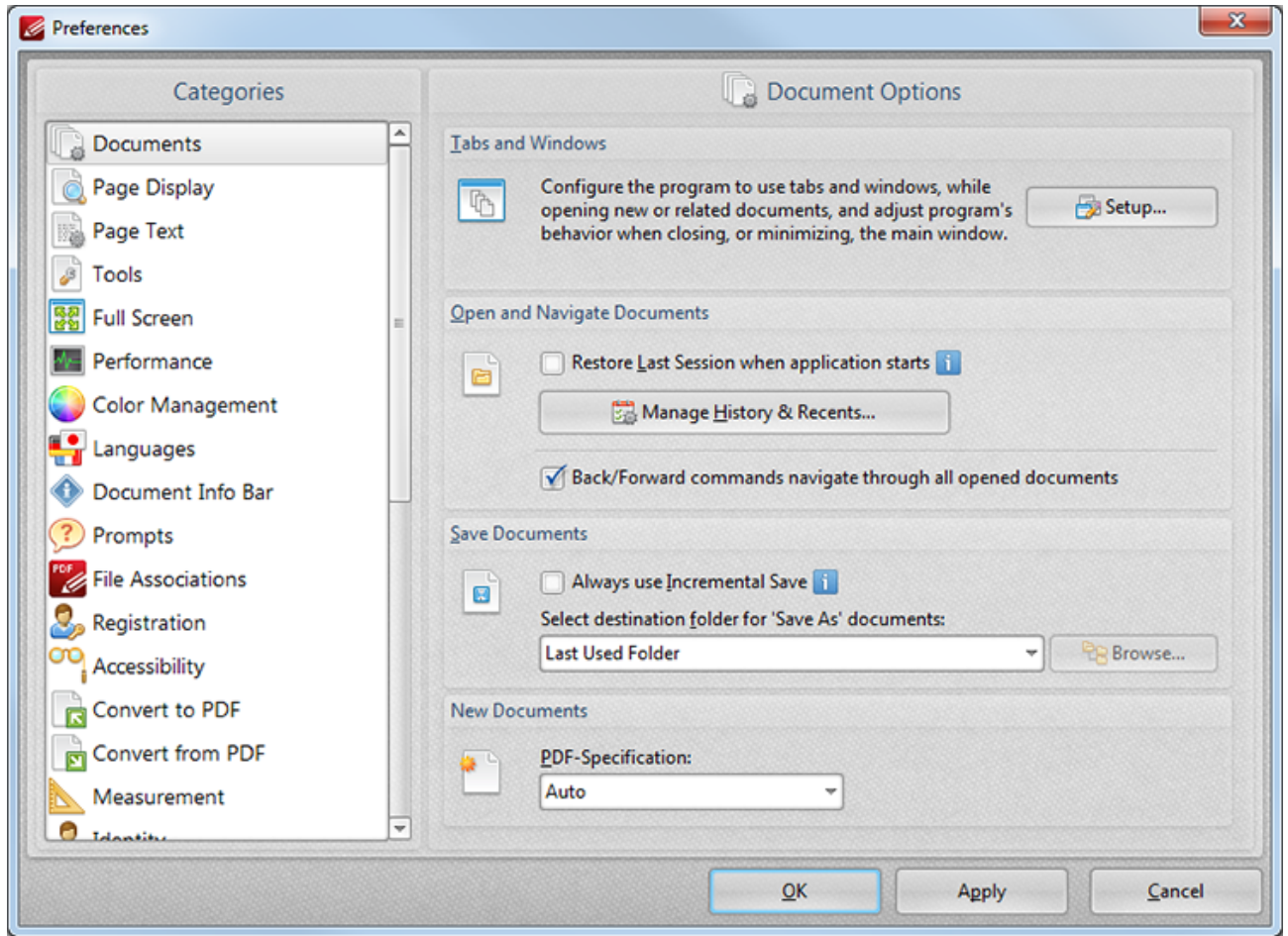
Figure 2. Preferences Dialog Box

Click the links for further information:

- **Documents** [232]
- **Page Display** [234]
- **Page Text** [237]
- **Tools** [632]
- **Full Screen** [241]
- **Performance** [243]
- **Color Management** [245]
- **Languages** [247]
- **Document Info Bar** [249]
- **Prompts** [251]
- **File Associations** [253]
- **Registration** [255]
- **Accessibility** [257]
- **Convert to/from PDF** [259]
- **Measurement** [261]
- **Identity** [264]

6.2.7.1   Documents

Documents

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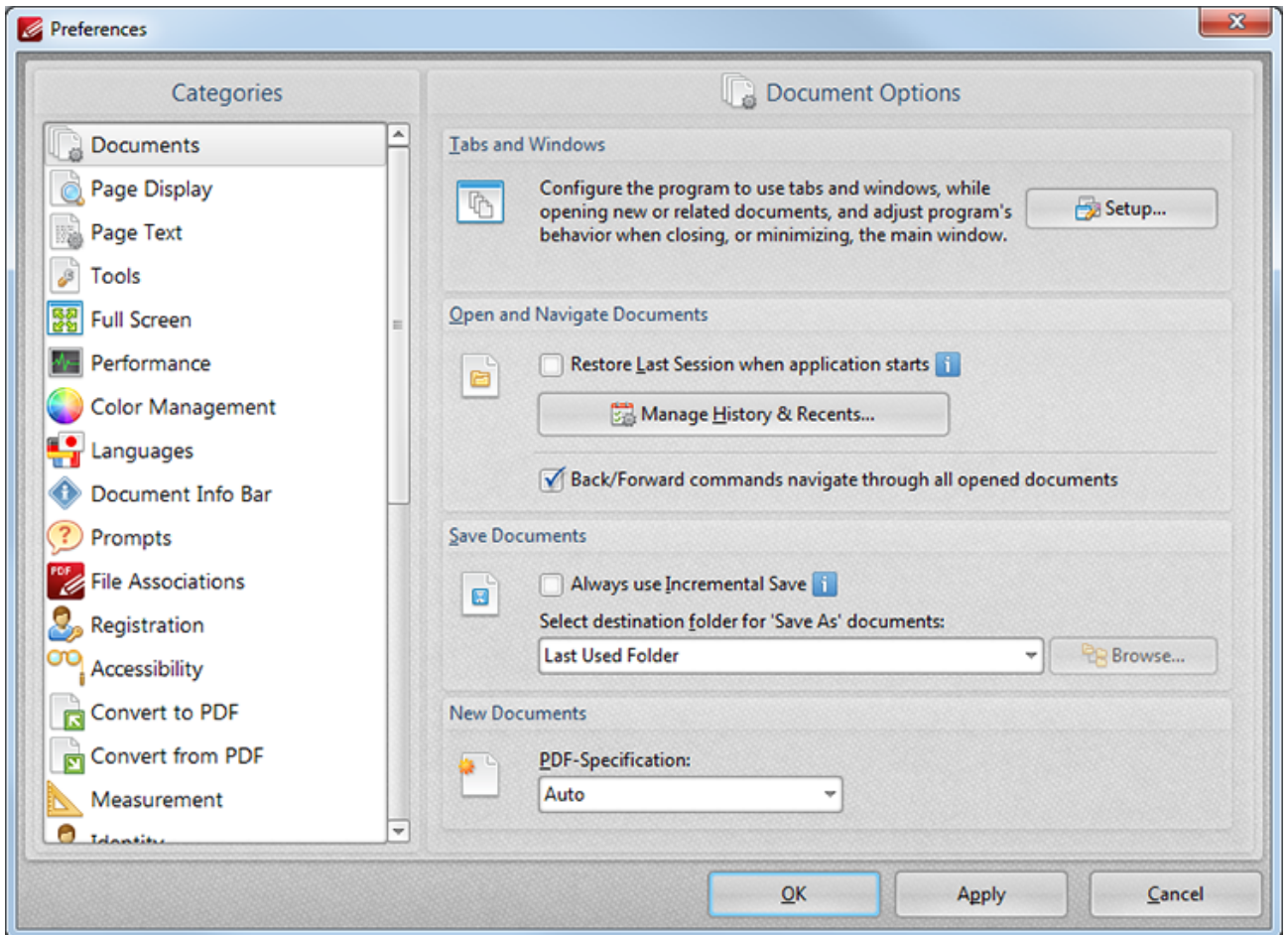

Figure 1. Preferences Dialog Box. Documents Tab Selected

- The **Tabs and Windows** settings determine the parameters for tabs and windows. Click **Setup** to determine these settings.
- The **Open Documents** setting provides the option of restoring the most recent session when **PDF-XChange Editor** is launched. Select the box to enable this option. Click the **Manage History and Recents** button for further settings.

- The **Save Documents** settings determine the parameters for saving documents:
  - Select the **Always use Incremental Save** button to enable incremental saving. This means that the original content and information relating to changes in the document is retained. Enabling this option reduces the time taken to save documents but increases the file size with each save. Incremental save should always be used when digital signatures have been applied to documents and will need to be subsequently verified.
  - Use the **Choose destination folder for 'Save As' of documents** text box to select the folder to which documents will be saved.
- The **New Documents** setting relates to the **PDF-Specification** of new documents. Select an option from the menu.

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

6.2.7.2   Page Display

Page Display

When the **Page Display** tab is selected the following dialog box is displayed:
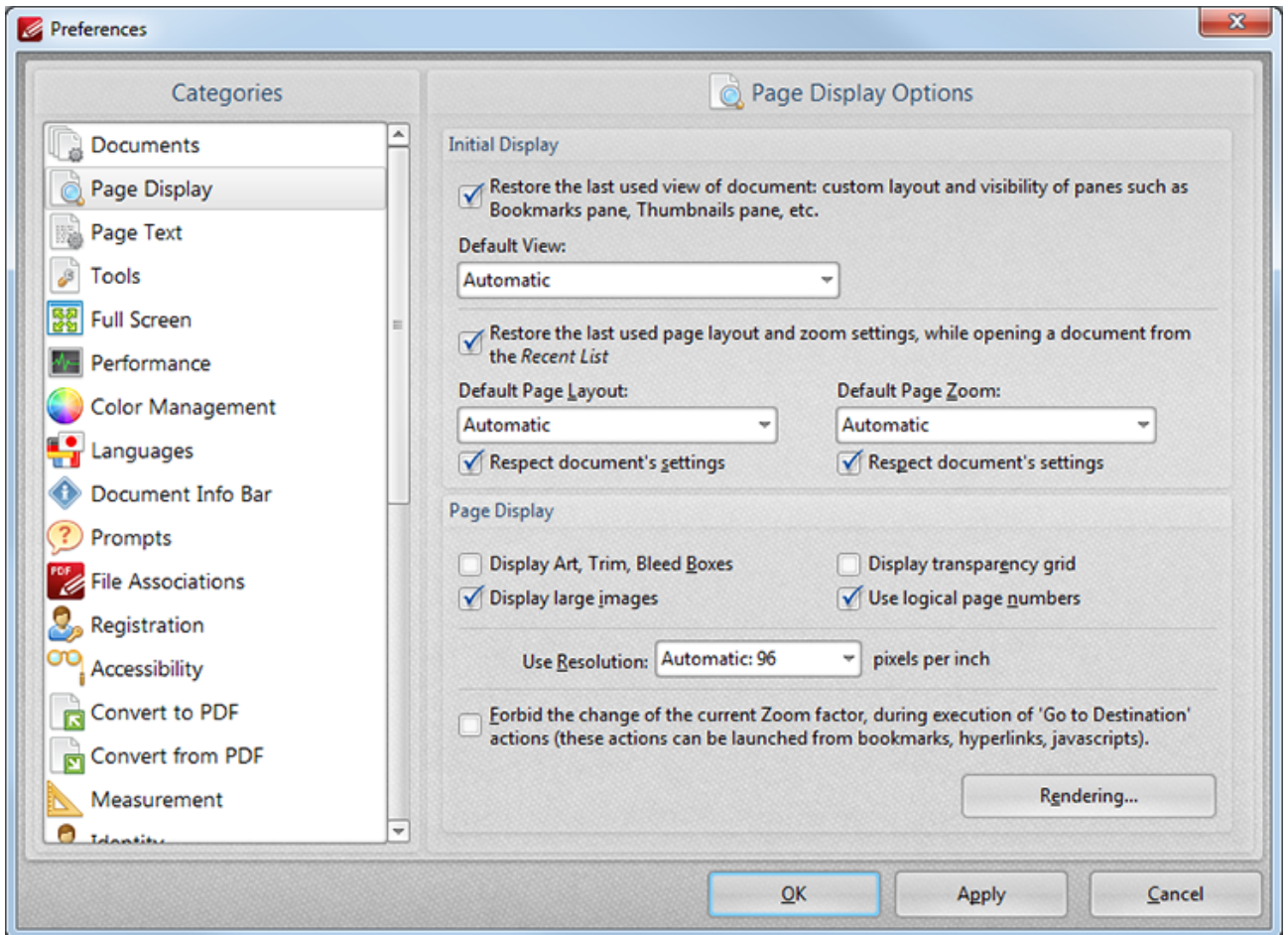

Figure 1. Preferences Dialog Box. Page Display Tab Selected

- The **Initial Display** settings determine the layout of documents when they are opened:
  - Select the indicated check box to restore the most recent display settings. Please note that the **Crop Pages** 574 settings can be used to determine page boxes.
  - Use the **Default View** menu to select the default viewing parameters for documents.

- Select the indicated check box to retain the most recently used page layout and zoom settings when opening a recent document.
- Use the **Default Page Layout** and **Default Page Zoom** menus to determine the default layout and zoom settings.

- The **Page Display** settings determine what is displayed on the active page:
  - Select the required check boxes.
  - Select an option from the **Use Resolution** menu to determine the viewing resolution.
  - Select the indicated check box to disable zoom settings when **'Go to Destination'** 742 actions are launched.
  - Click the **Rendering** button to determine the rendering settings. The following dialog box will open:
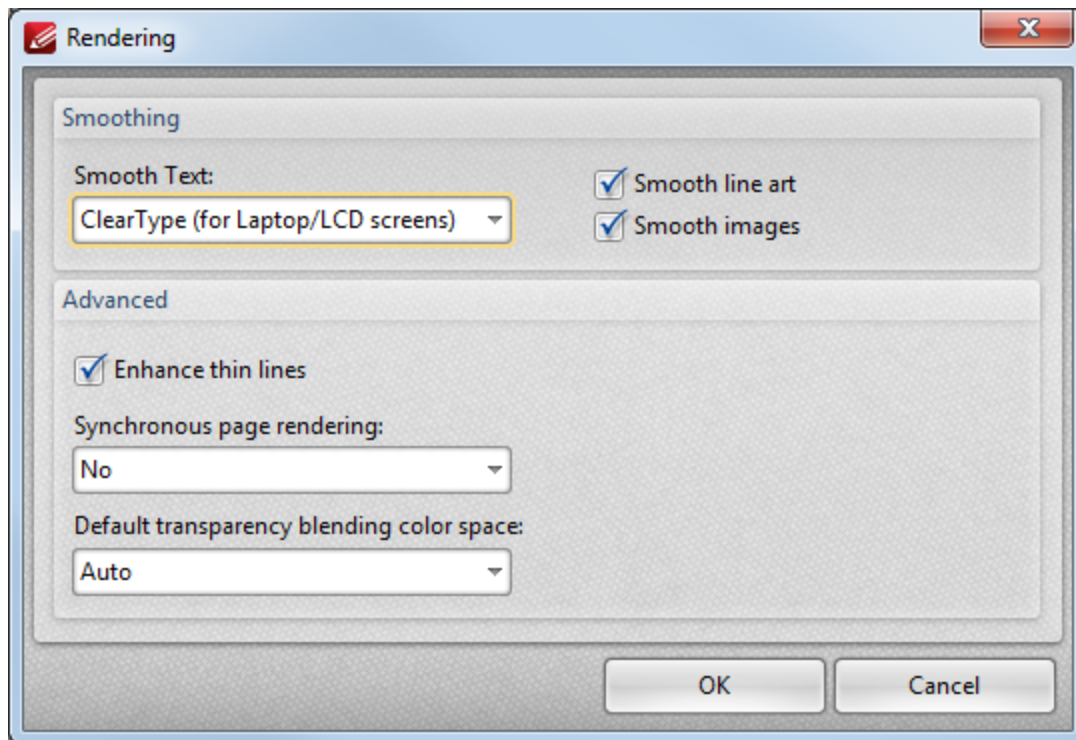

Figure 2. Rendering Dialog Box

- 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).
  - **Synchronous page rendering** defines the rendering method of pages in the active PDF:

- **Auto** is the default setting. This means multiple pages are rendered simultaneously in order to optimize smoothness when scrolling. It may also cause the program to wait for the current page to finish rendering before moving onto the next page.
- **No** means pages are rendered only when the current page has finished rendering. This option may cause lag when scrolling through long documents, especially if they contain many objects and images.
- **Yes** means all document pages are rendered simultaneously. This may cause the initial rendering to be slower but ensures lasting smoothness when it is complete.
- Use the **Default transparency blending color space** menu to select the default color space for transparency blending:
  - **Auto** uses RGB color when there is no transparency between intersecting objects and CMYK in cases of transparency.
  - **Working RGB** uses only RBG color space.
  - **Working CMYK** uses only CMYK color space and converts it to RGB when displayed on-screen.
  - **Working Grayscale** uses only grayscale when rendering.

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

6.2.7.3   Page Text

Page Text

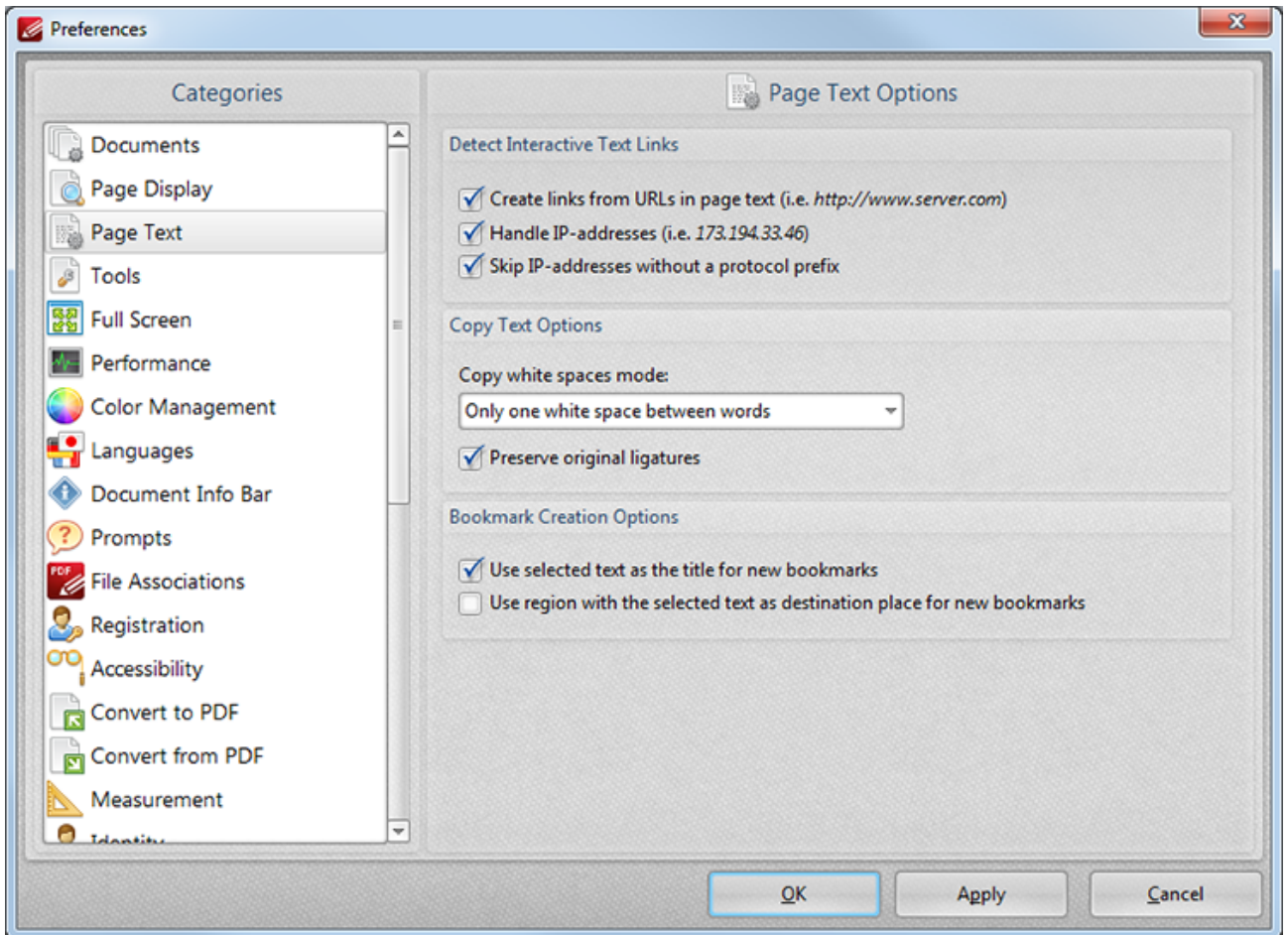When the **Page Text** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Page Text Tab Selected

- The **Detect Interactive Text Links** check boxes determine parameters for interactive text.
- The **Copy Text Options** determine the outcome when text is copied.
- Select the **Preserve original ligatures** box to preserve original ligatures. (Ligatures occur when letters are joined as single glyphs, such as the "æ" grapheme in English). If this box is cleared then ligatures may be created from their individual parts instead.

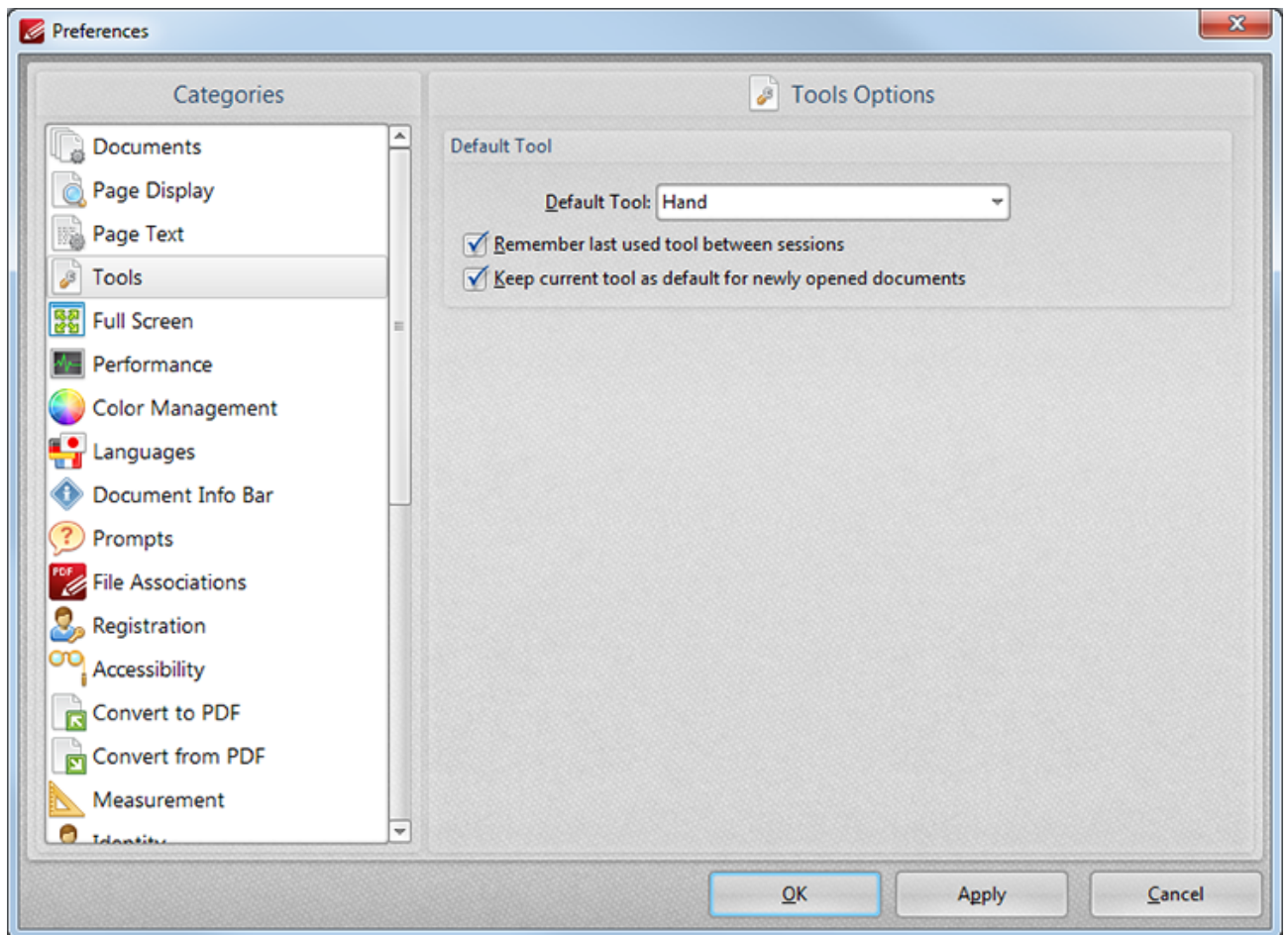Click **Apply** to apply changes and **OK** to save changes.

6.2.7.4   **Tools**

Tools

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

Figure 1. Preferences Dialog Box. Tools Tab Selected

- Use the **Default Tool** menu to select the default tool when documents are opened.
- Alternatively, select a check box to determine the tool.

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

6.2.7.5 Full Screen

Full Screen

When the **Full Screen** tab is selected the following options are available::
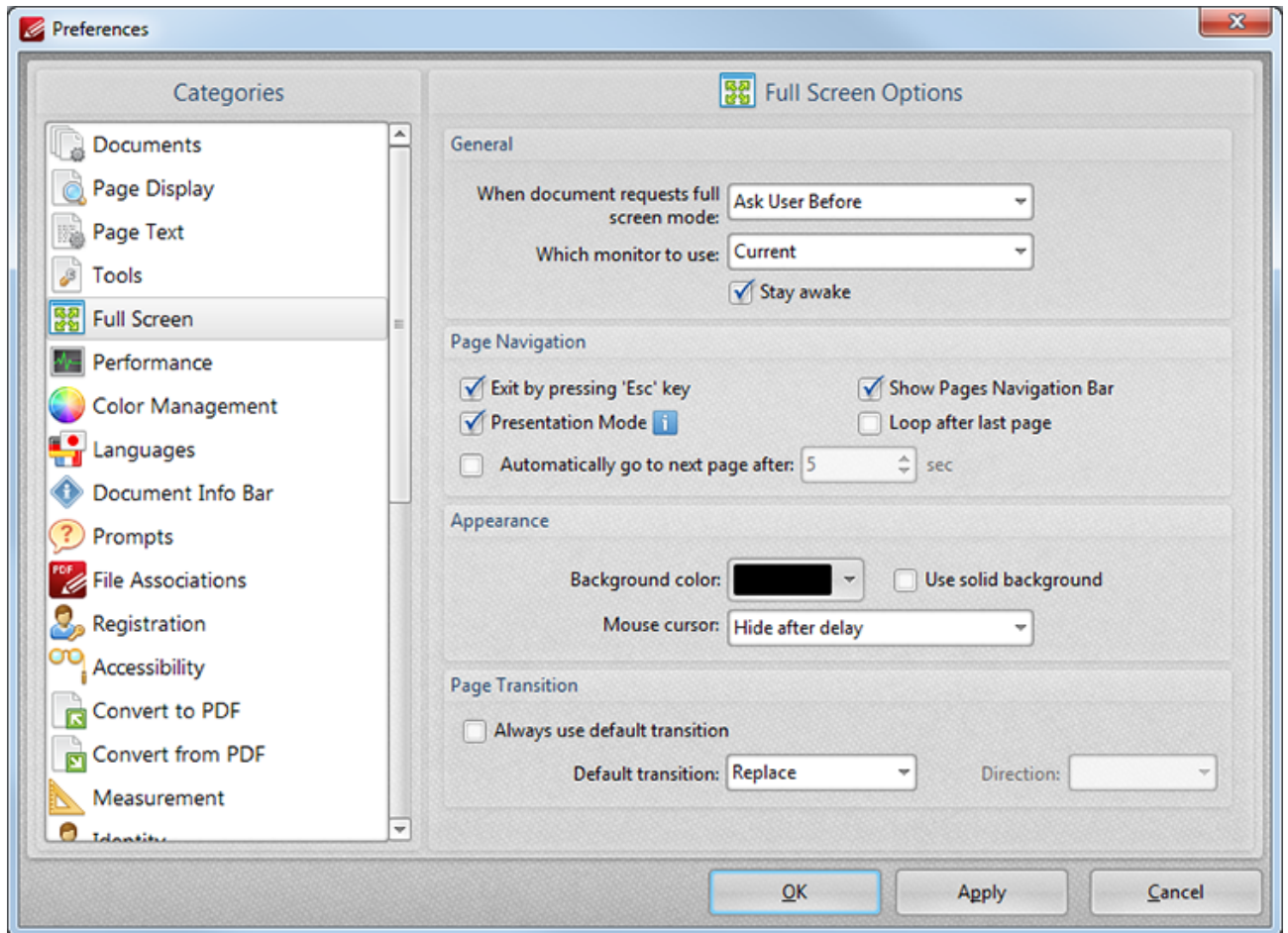

Figure 1. Preferences Dialog Box. Full Screen Tab Selected

- The **General** settings determine how documents are displayed when they are opened:
  - Select the desired options from the full screen mode and monitor menus.
  - Select the **Stay awake** box to prevent the computer from going into screensaver/sleep/hibernate mode.

- The **Pages Navigation** settings determine the navigation parameters:
  - Select the desired boxes to enable their features.
  - Select the **Automatically go to the next page after** box to enable the automatic page browsing feature. Enter a value in number box to determine the browsing rate.

- The **Appearance** settings determine further options of the display:
  - Select a background color from the menu.
  - Select the **Use solid background** box as desired.
  - Select an option from the **Mouse Cursor** menu to determine the mouse cursor settings.

- The **Page Transition** settings determine transition options:
  - Select the **Always use default transition** box to use the transition determined in the menu below.
  - Select an option from the **Default Transition** menu. When an option is selected, further options are available in the **Direction** menu.

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

6.2.7.6   Performance

Performance

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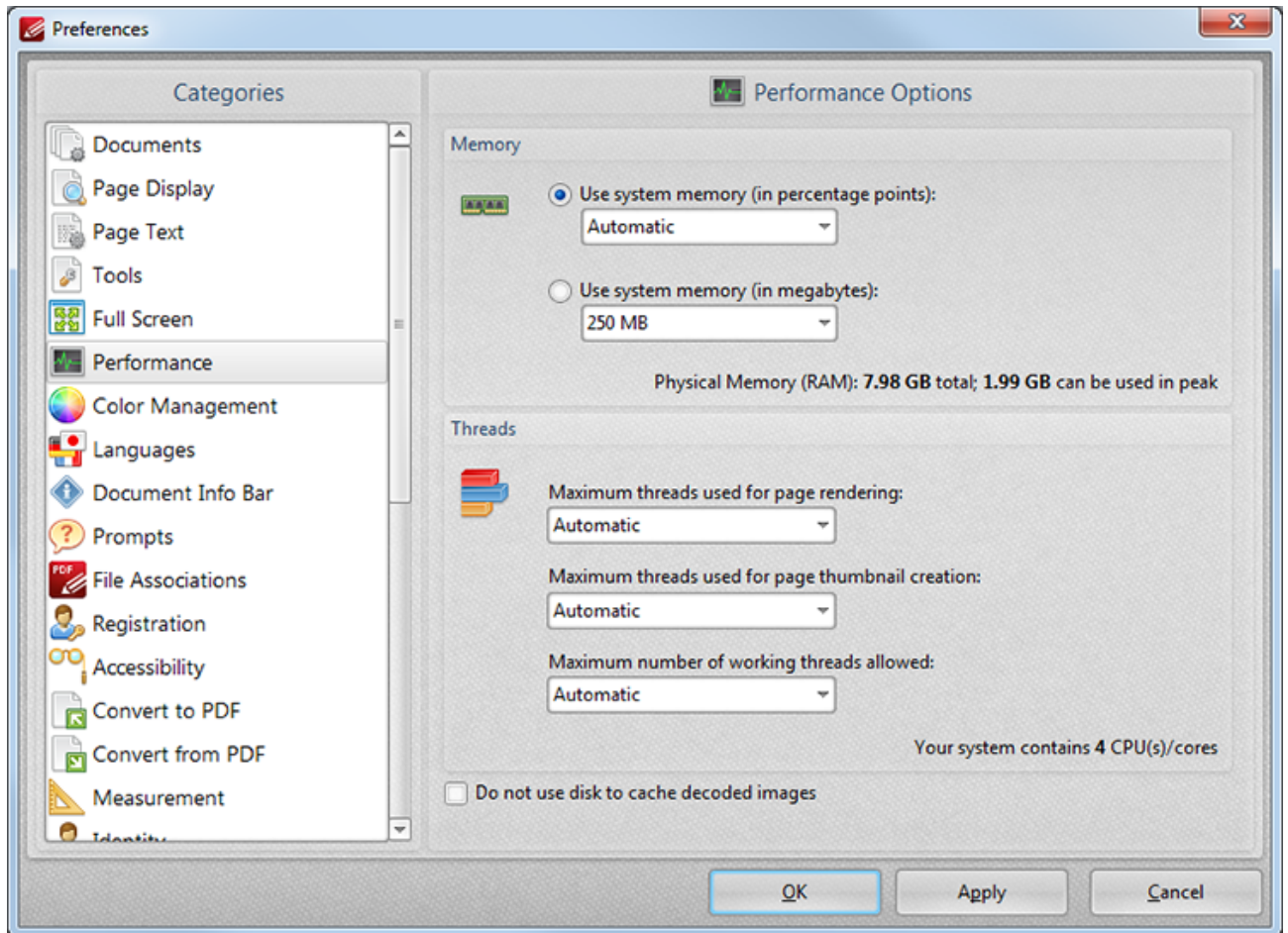

Figure 1. Preferences Dialog Box. Performance Tab Selected

- The **Memory** settings feature two parameters that determine how much memory **PDF-XChange Editor** uses:
    - Select an option from the **Use system memory in percentage points** menu to set memory usage to automatic or one of the listed percentages.

- Select an option from the **Use system memory in megabytes** menu to set memory usage in megabytes.
- When using either of the above options, it should be noted that increasing memory usage will improve the application's performance but may impact overall system performance.

- The **Threads Usage** settings determine how many threads are used at specific moments within the application's software:
  - Select an option from the menus to determine how many threads are used for **page rendering** and **thumbnail creation,** and the **maximum number of working threads allowed.**
  - Select the **Do not use disk to cache decoded images** box as desired.

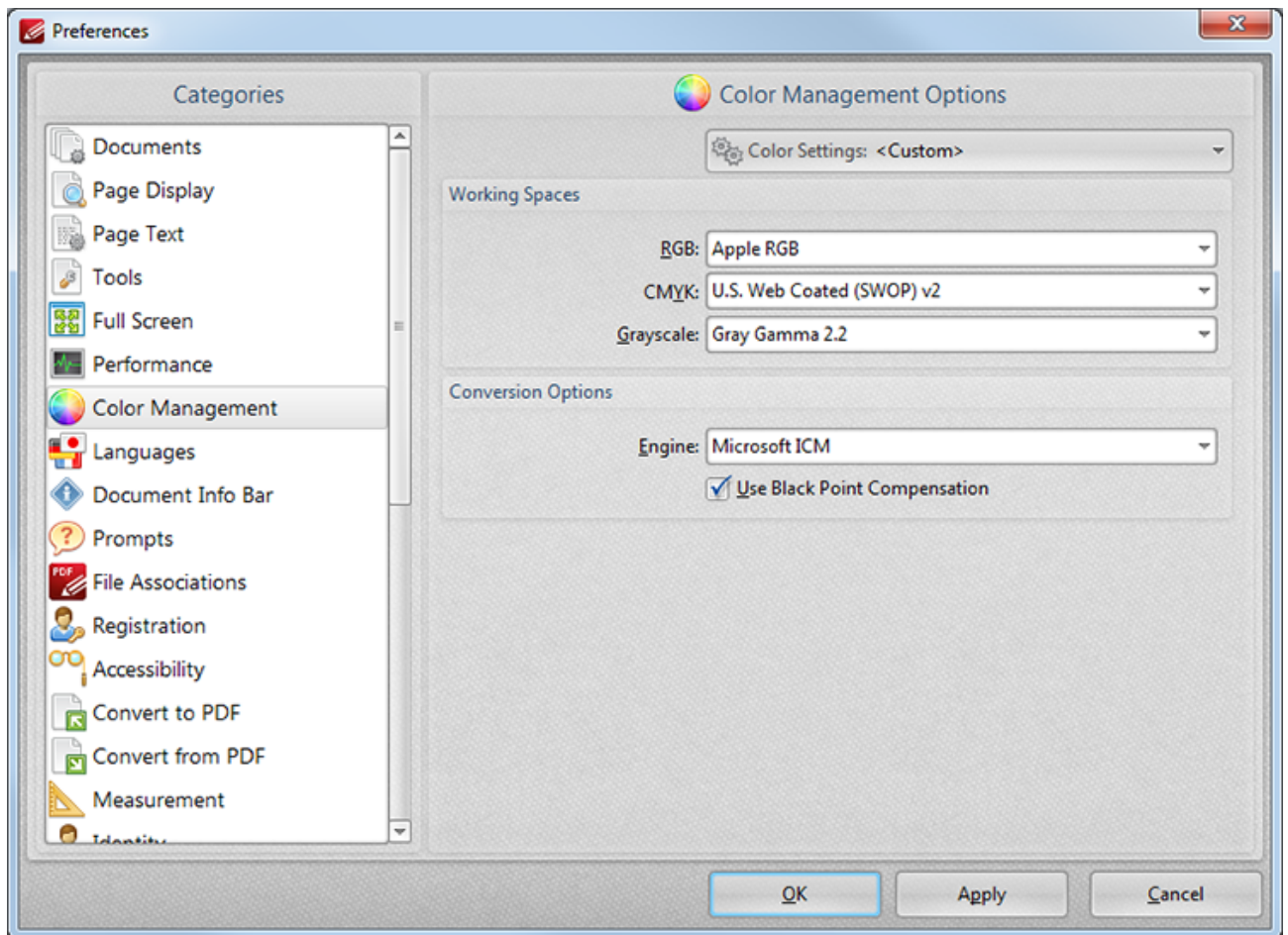Click **Apply** to apply changes and **OK** to save changes.

6.2.7.7 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

- Select an option from the **Color Settings** menu as desired. When customized details have been entered in the **Working Spaces** and **Conversion Options** section, this menu can be used to save them for subsequent use. Click **Save Current Settings** to save settings. Click **Delete** to delete the profile currently selected. Click **Manage** to edit or clone profiles.

- There are three settings in the **Working Spaces** section. These apply to images saved with various color options. Select the desired settings from the menus.
- There is one setting in the **Conversion Options** section. This determines which engine is used for color space conversion. **Little CMS** is the only option.
- Select the **Use Black Point Compensation** box as desired.

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

6.2.7.8 Languages

Languages

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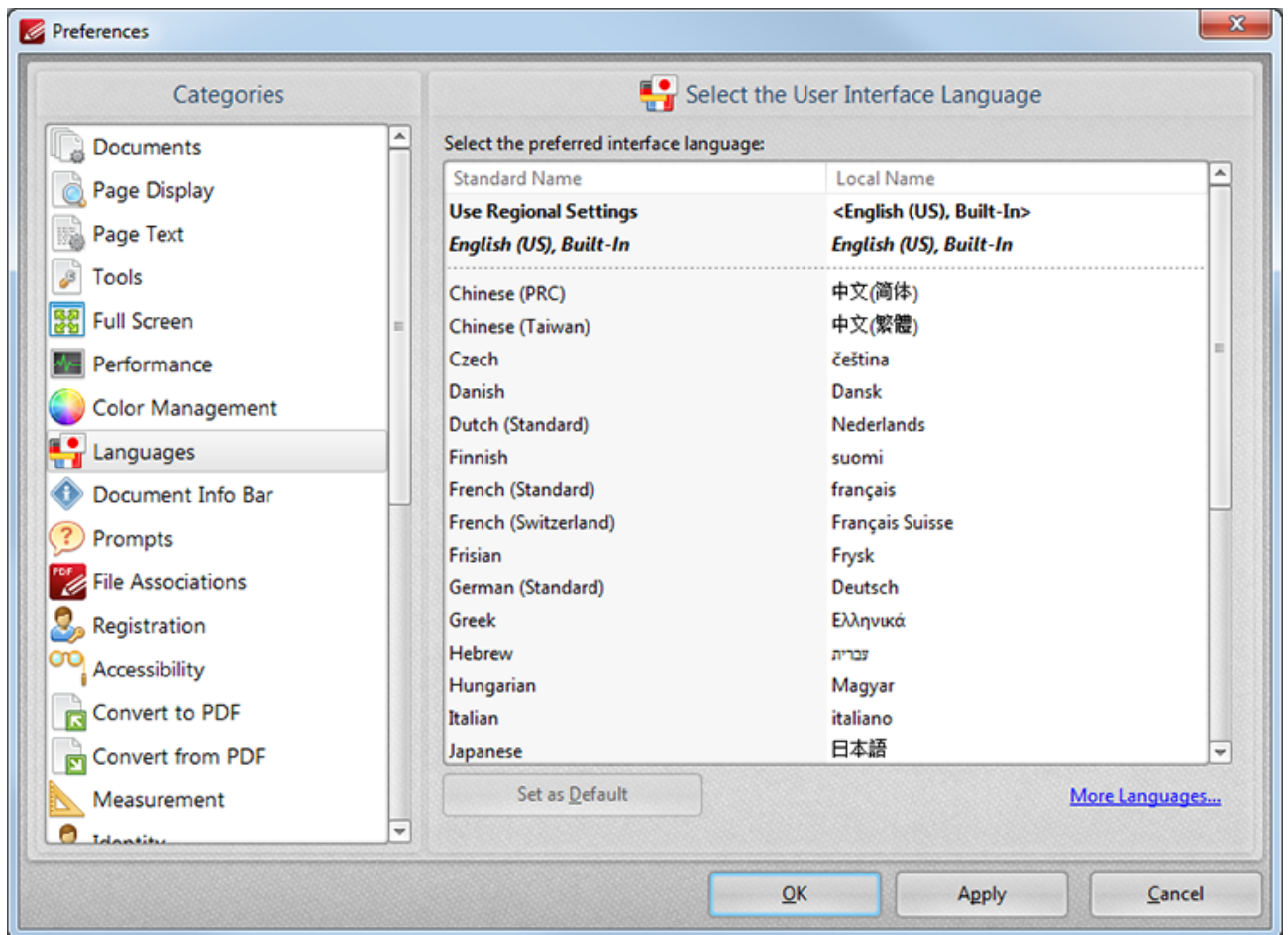
Figure 1. Preferences Dialog Box. Languages Tab Selected

- Select a language for the user interface.
- Click the **Set as Default** button to set the selected language as the default language.
- See **here** for a complete list of available languages.

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

6.2.7.9 Document Info Bar

Document Info Bar

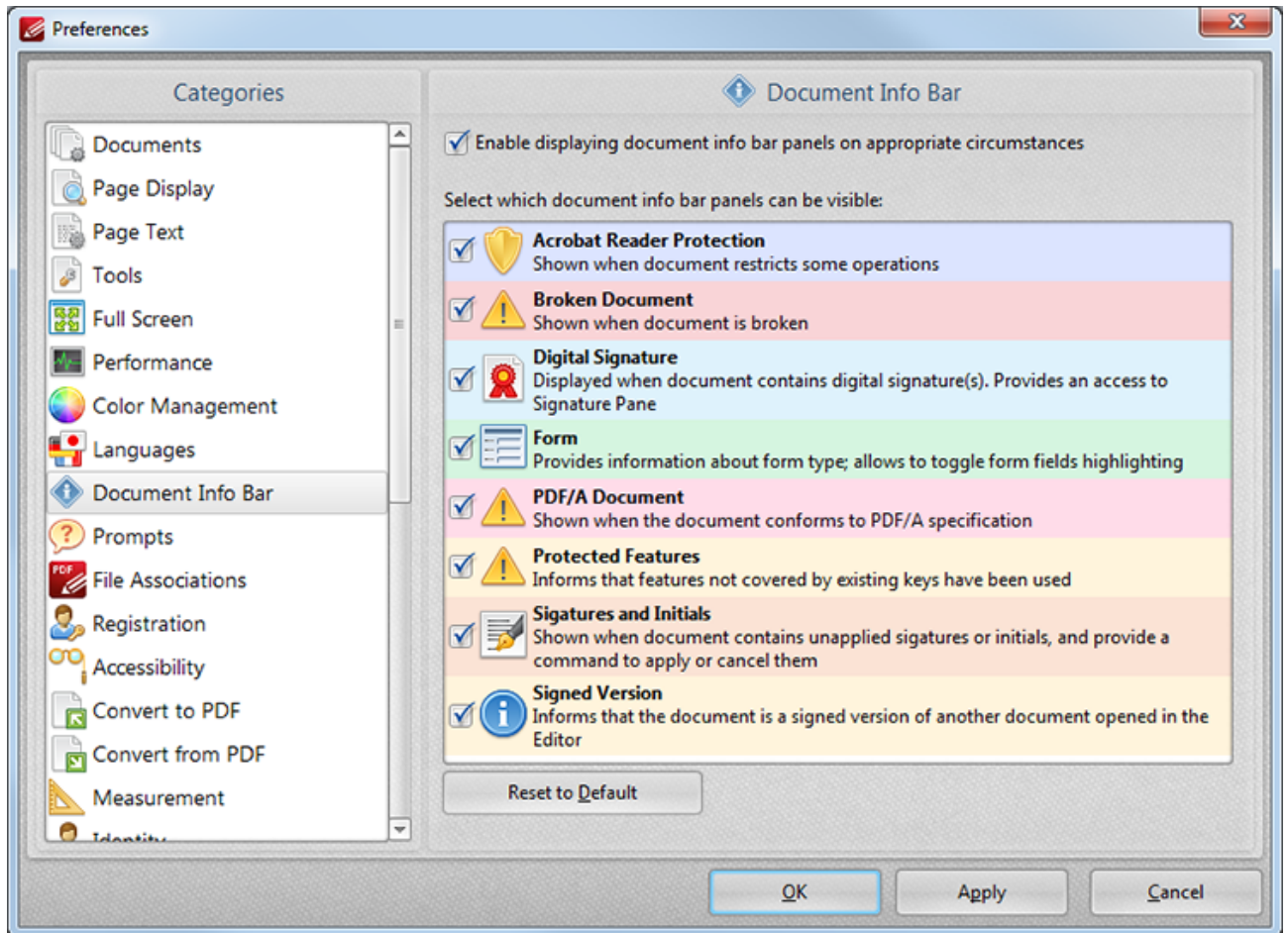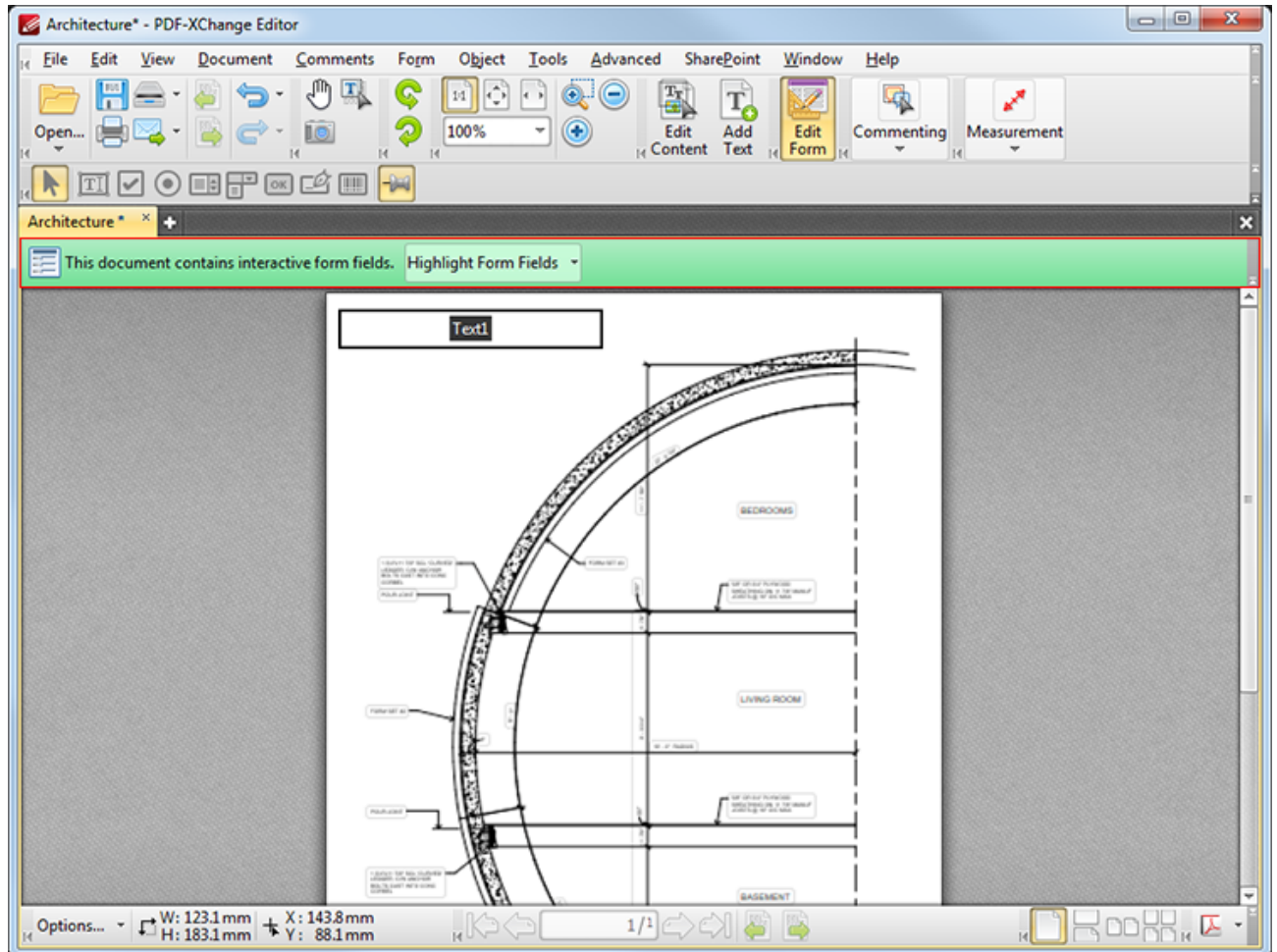When the **Document Info Bar** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Document Info Bar Tab Selected

Document Info Bars appear during specific operations in **PDF-XChange Editor.** These operations are detailed in *(figure 1).*

- Select/clear the **Enable displaying document info bar panels on appropriate circumstances** box to enable/disable **Document Info Bars.**

- When **Document Info Bars** are enabled, select/clear the eight options in *(figure 1)* to enable/disable the associated **Document Info Bar.**
- Click **Reset to Default** to reset all settings to their default values.
- The **Form Document Info Bar** is displayed in *(figure 2):*

Figure 2. Form Document Info Bar

6.2.7.10   Prompts

Prompts

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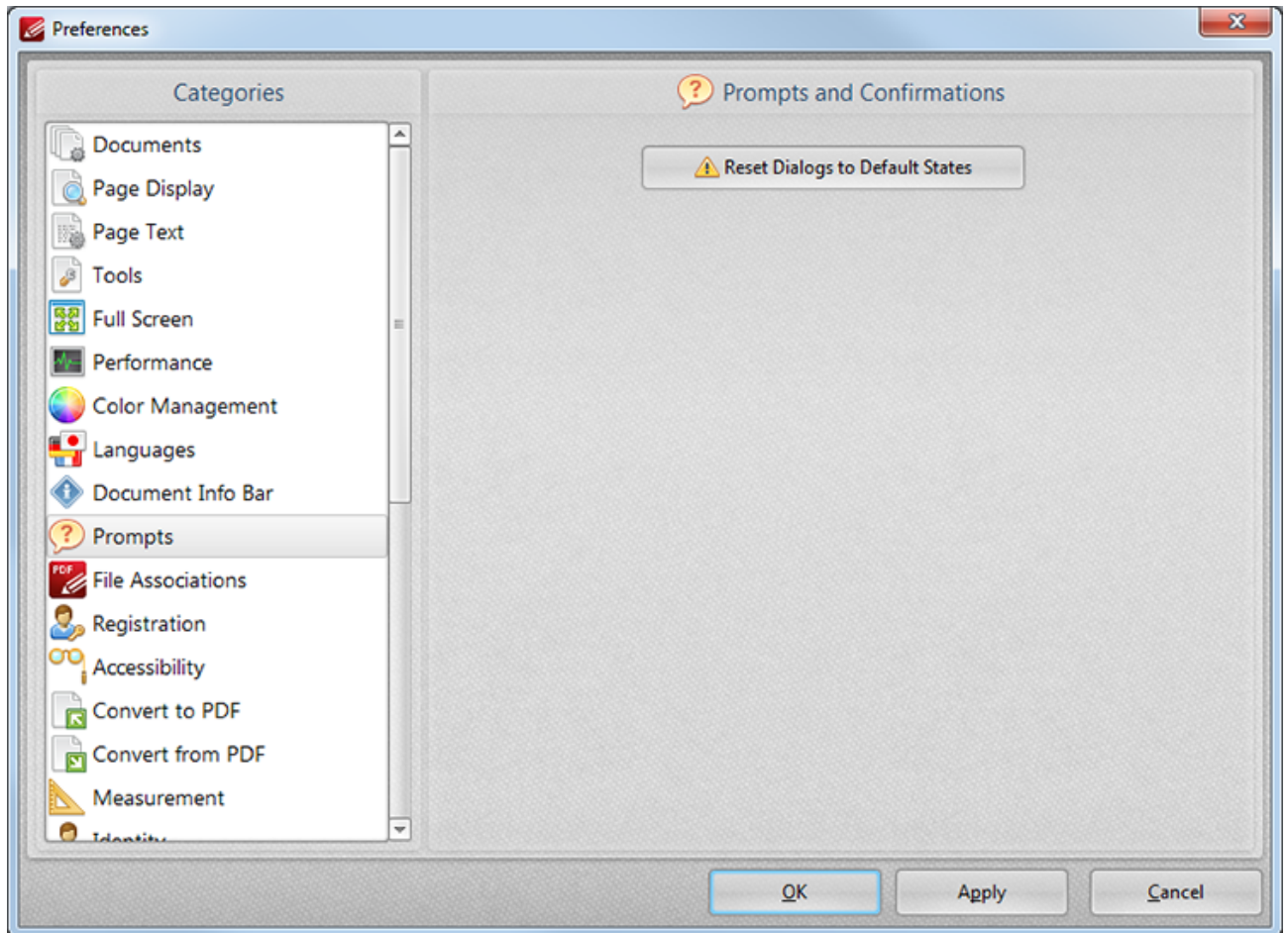

Figure 1. Preferences Dialog Box. Prompts Tab Selected

Click the **Restore default dialogs state** button to revert all dialogs to their default state. This will also restore any warning message check boxes within **PDF-XChange Editor** that have been selected to not appear again.

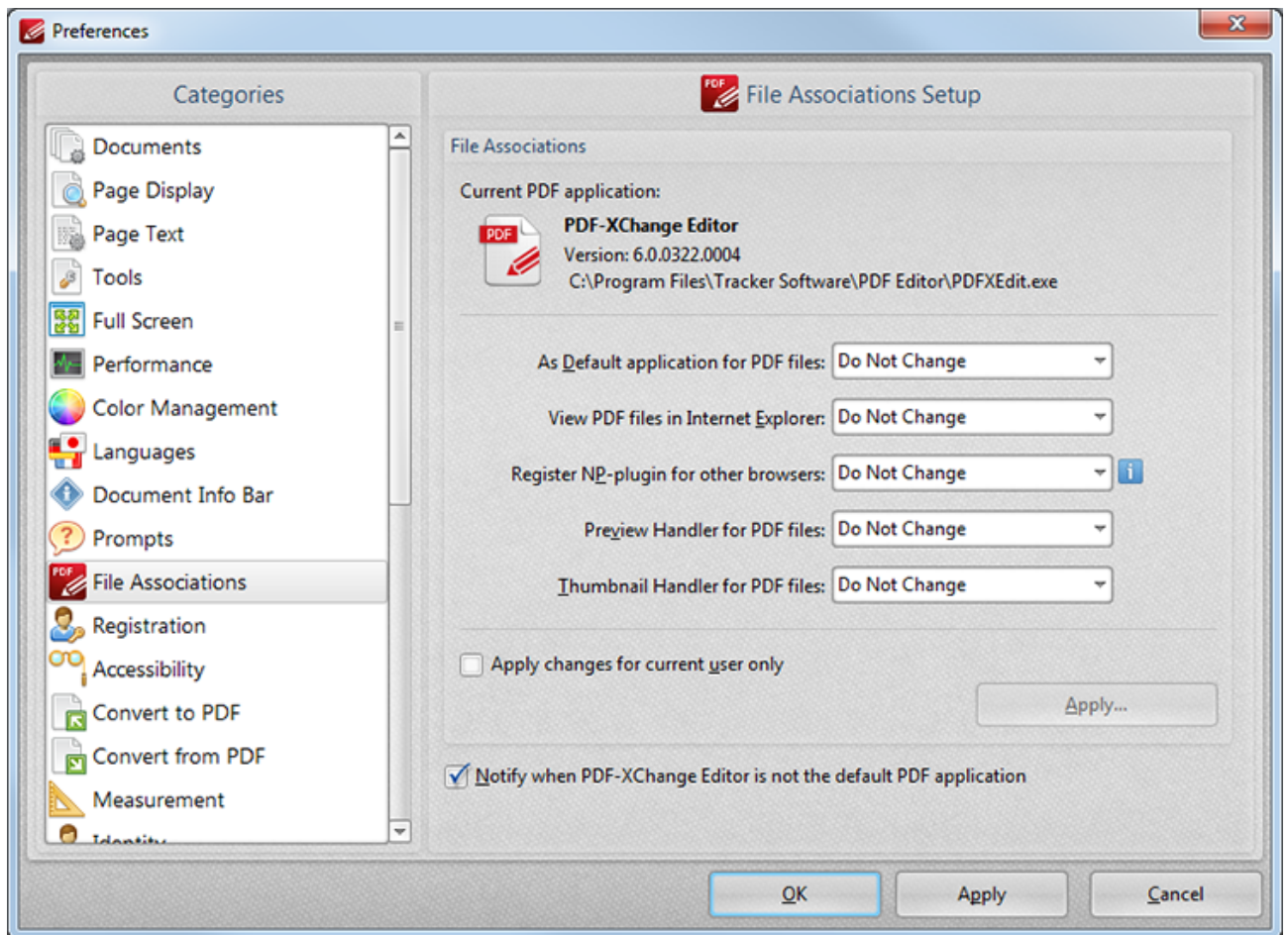Click **Apply** to apply changes and **OK** to save changes.

6.2.7.11 File Associations

File Associations

When the **File Associations** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. File Associations Tab Selected

Windows uses file associations to identify files to be used with specific programs. (Please note that the **Control Panel** of the local computer can also be used to determine file associations).

- The current PDF viewing/editing application is shown at the top of the dialog box. **PDF-XChange Editor** is the current application in *(figure 1).*

- The menus that follow determine when the current application is used:
  - The **As Default application for PDF files** menu has three options:
    - **Do not change** retains the existing file associations.
    - **Make Default** sets the current application as the default application.
    - **Restore** implements the previous default application that was used for PDF files.
  - The remaining four menus have three options:
    - **Do not change** retains the existing file associations.
    - **Yes** enables the current application for the option in question.
    - **No** disables the current application for the option in question.
  - Select the **Apply changes only for current user** box as desired. When this option is selected, click **Apply** to apply changes.
  - The **Notify when PDF-XChange Editor is not default PDF Application** box is selected by default. Clear the box to disable notifications.

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

6.2.7.12 Registration

Registration

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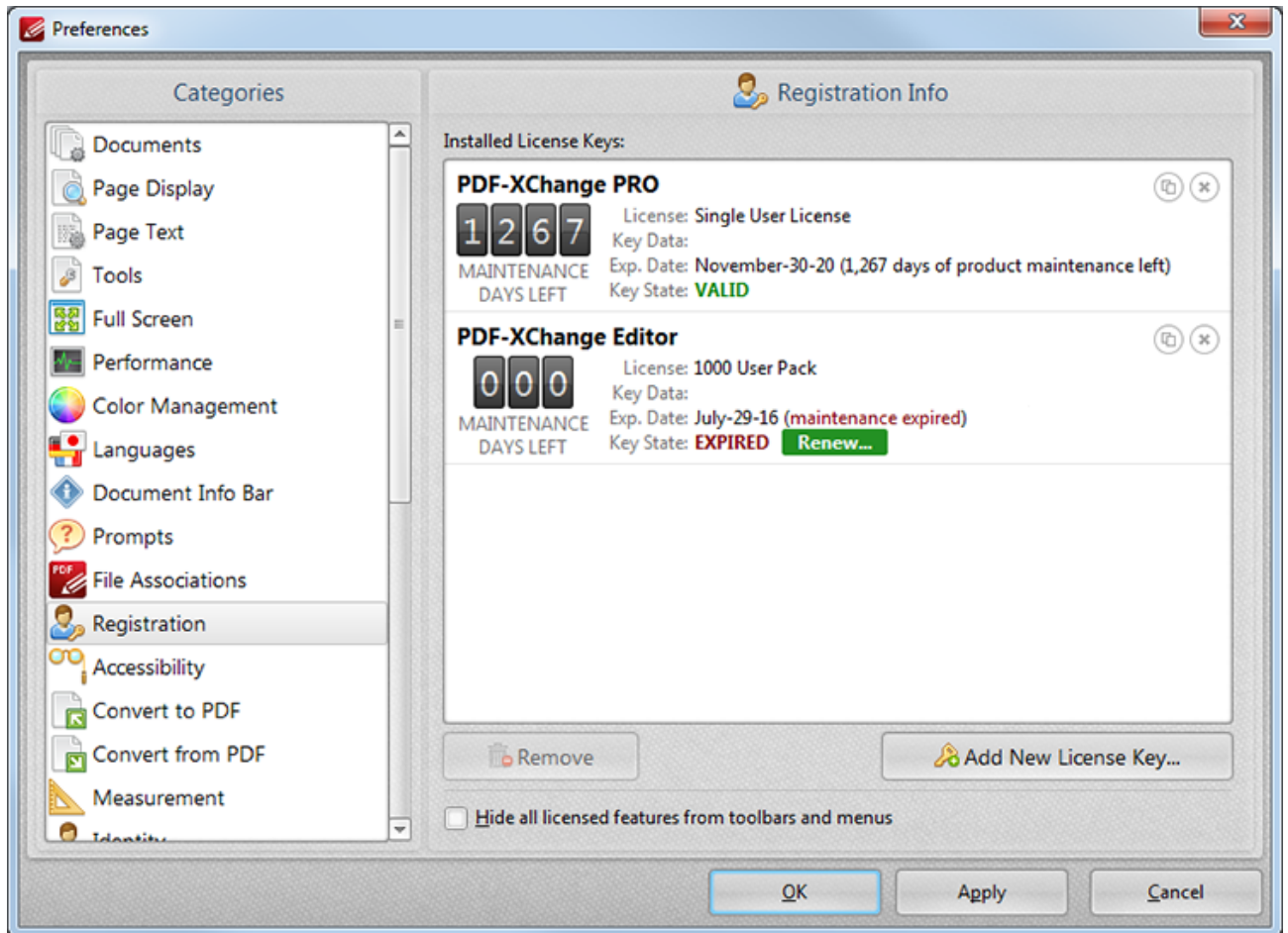

Figure 1. Preferences Dialog Box. Registration Tab Selected

The **Registration** tab is used to register/edit serial keys for **PDF-XChange Editor.** Current versions and their details are shown in the dialog box, as in *(figure 1).*

- Click the **Remove** button to remove serial keys currently installed.
- Click the **Add new Serial Key** button to add a new serial key.
- Select the **Hide all licensed features from toolbars and menus** box as desired.

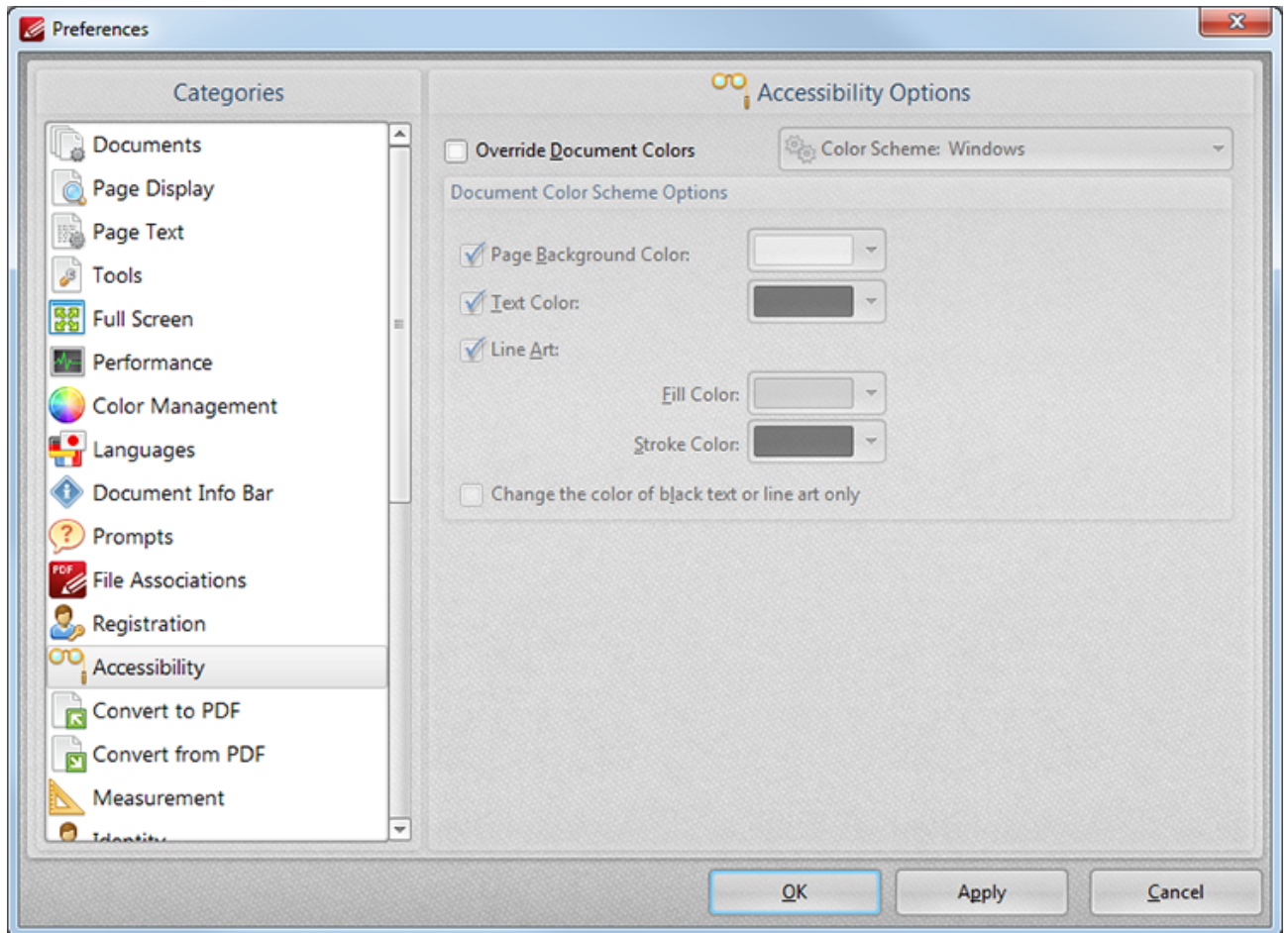Click **Apply** to apply changes and **OK** to save changes.

6.2.7.13   Accessibility

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

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

Figure 1. Preferences Dialog Box. Accessibility Tab Selected

The **Accessibility** tab is used to control the color options of PDF documents. This improves the usability for the visually impaired.

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

- Select the **Change the color of black text or line art only** box to apply changes to text and line art that appears as black on white only.

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

6.2.7.14 Convert to/from PDF

Convert to/from PDF

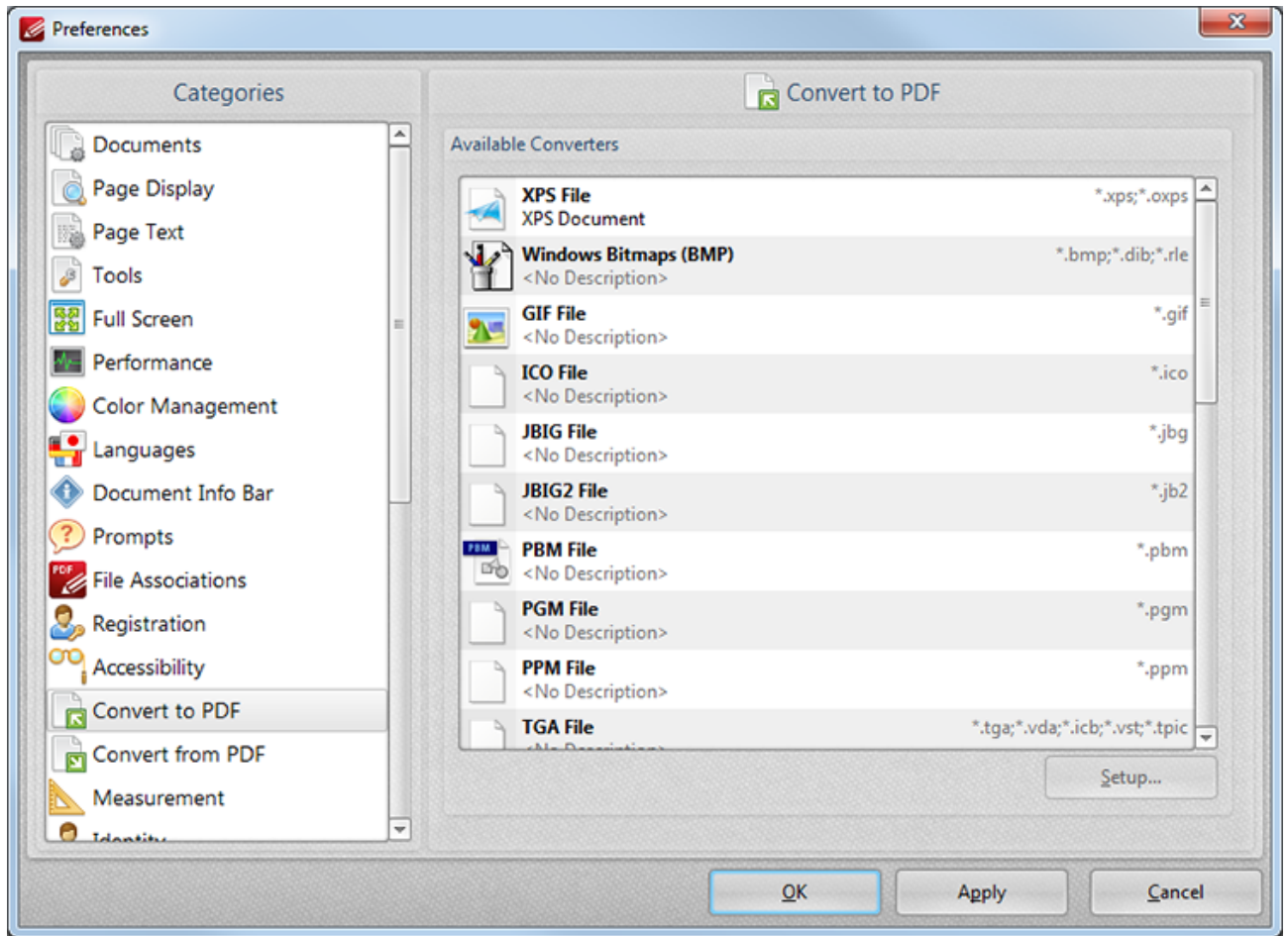When the **Convert to PDF** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Convert to PDF Tab Selected

This option shows the file formats that can be converted to PDF format. When formats have further options the **Setup** button is enabled. Click the button to determine these options.

The options in **Convert from PDF** tab are the same as those detailed above but they are used when converting from PDF format.

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

6.2.7.15 Measurement

Measurement

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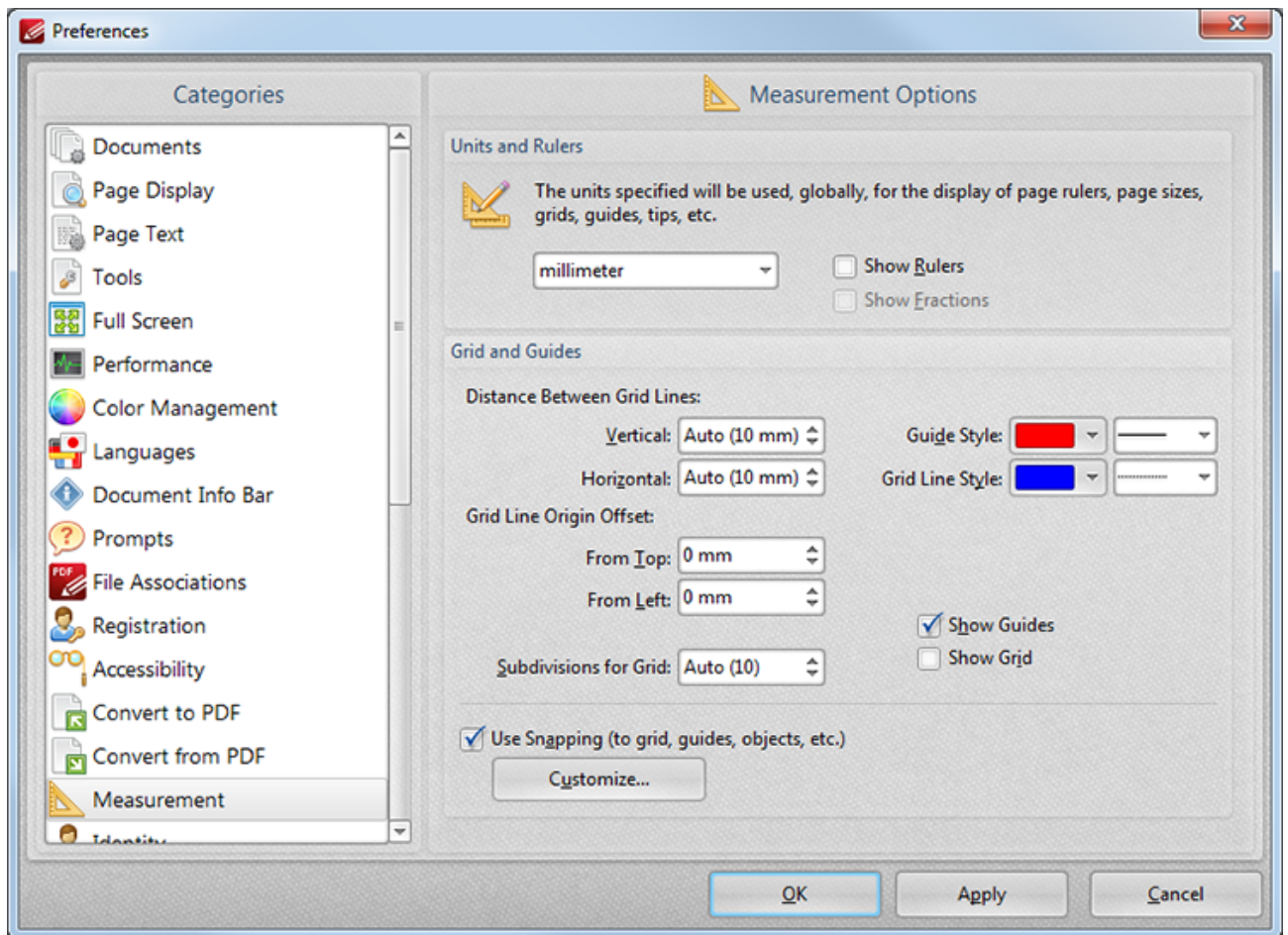

Figure 1. Preferences Dialog Box. Measurement Tab Selected

These options determine the settings for units of measurement and certain layout options.

- Select an option from the units menu to determine the units of measurement within documents.
- Select the **Show Rulers** box to make rulers visible within documents.

- Select the **Show Fractions** box to make fractions visible within documents.
- Use the **Grids and Guides** section to determine the layout and color of grids within documents. Grids provide a visual reference for aligning objects within documents.
- Select the **Use Snapping** box to enable snapping. Click the **Customize** button to customize the snapping parameters. The following dialog box will open:
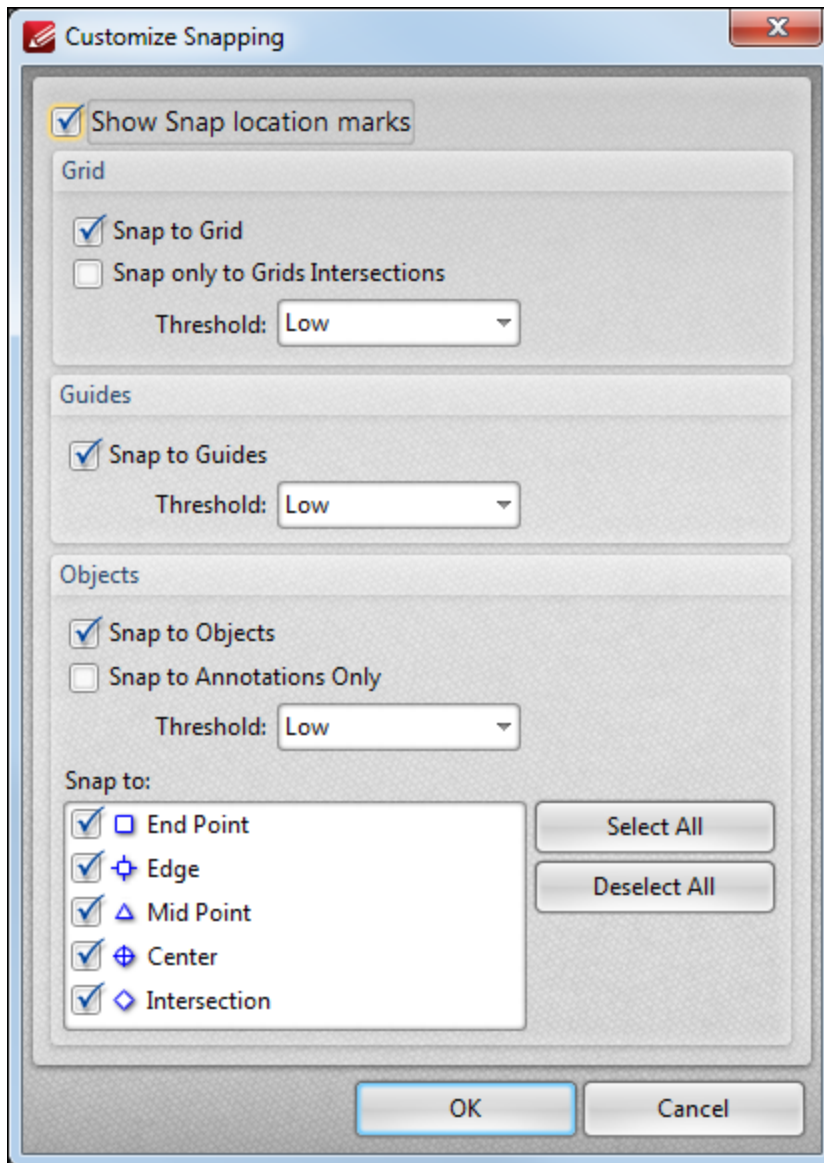
Figure 2. Customize Snapping Dialog Box

- Select the **Show Snap location marks** box as desired.
- Use the **Grid** settings to determine how objects in the document interact with grids:
  - Select the **Snap to Grid** box to align objects with the nearest grid line when they are moved.
  - Select the **Snap only to Grids Intersections** box to align objects only to the intersection of grids.

- Select the **Snap to Guides** box to snap objects to guide lines when they are moved.
- Use the **Threshold** menu to determine the level of sensitivity for guide lines.
- Use the **Objects** settings to determine how shapes in the document interact with objects:
  - Select the **Snap to Objects** box to align shapes with other objects.
  - Select the **Snap to Annotations Only** box as desired.
  - Use the **Threshold** menu to determine the level of sensitivity for objects.
- Select the check boxes in the **Snap to** menu to determine at which points snapping is enabled for objects.

When the desired settings have been entered, click **OK** to save. Then, in the **Preferences** dialog box, click **Apply** to apply changes. Click **OK** to save changes.
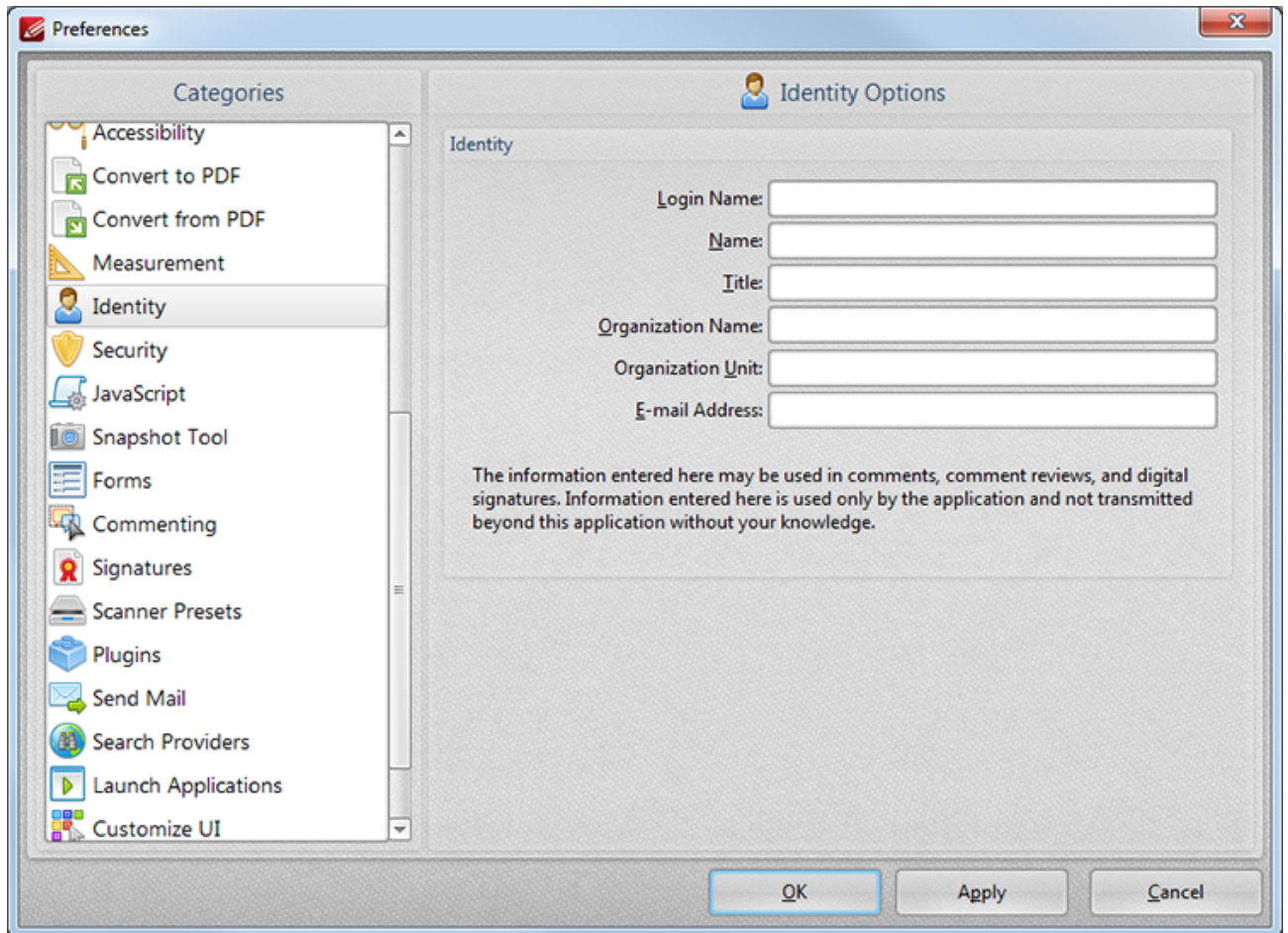
6.2.7.16 Identity

Identity

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

Figure 1. Preferences Dialog Box. Identity Tab Selected

The **Identity** settings are used to store frequently-used information about the user and can be added to PDF documents subsequently. Enter the desired details into the text boxes.

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

6.2.7.17 Security

Security

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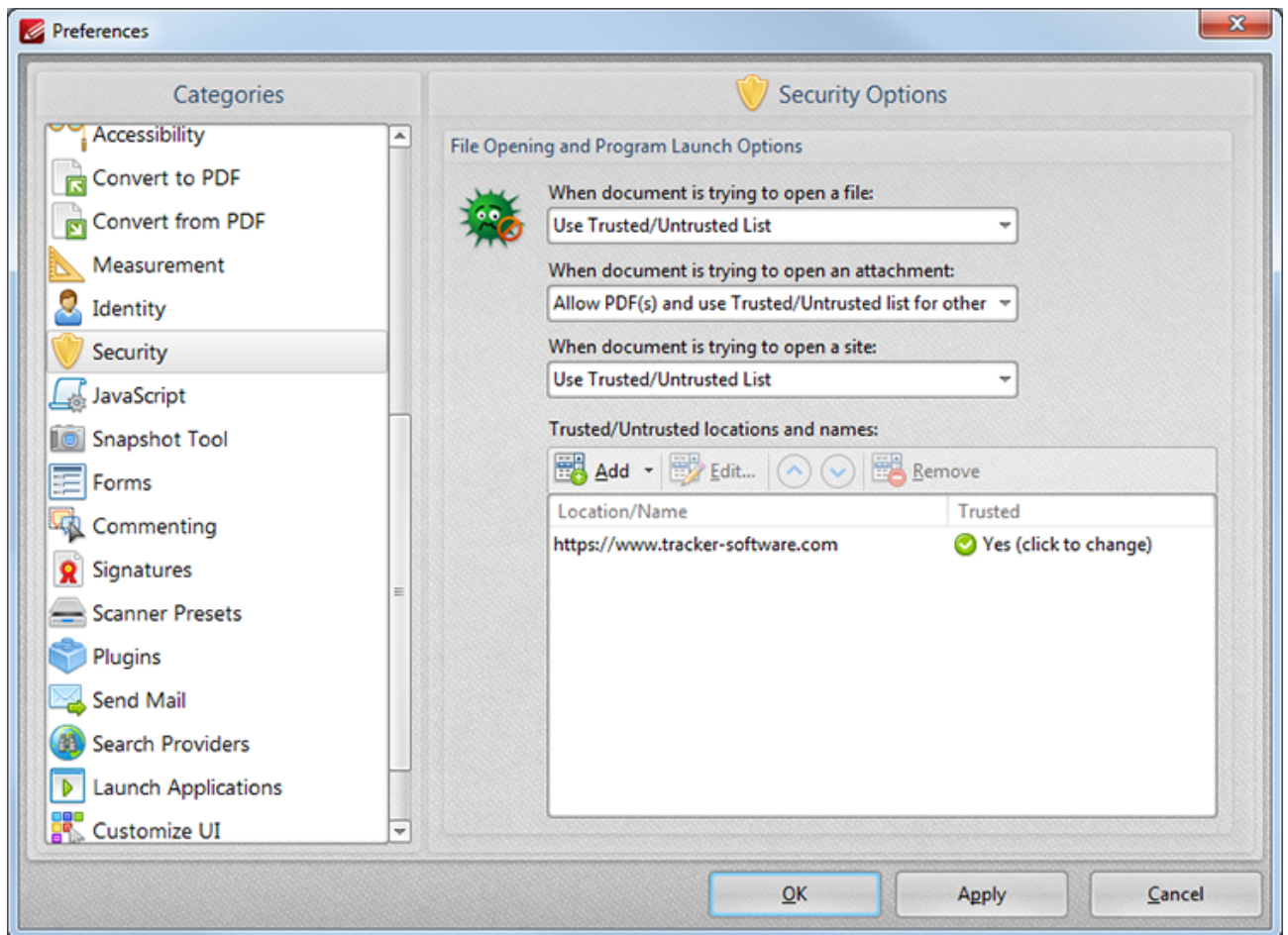

Figure 1. Preferences Dialog Box. Security Tab Selected

The **Security** settings are used to determine the actions that **PDF-XChange Editor** takes at specific moments during operation:

- There are four options when the software is opening a file or an attachment:

- **Use Trusted/Untrusted list,** which can be specified using the **Trusted/Untrusted locations and names** text box. If the file/attachment is not specified then **PDF-XChange Editor** will prompt before opening.
- **Prevent it,** which prevents all files and attachments from being opened. The **Attachments pane** 517 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 unspecified in the list then **PDF-XChange Editor** will prompt before opening the file/attachment.

- 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 then **PDF-XChange Editor** will prompt before opening.
  - **Prevent it,** which prevents all sites from opening.
  - **Allow it,** which allows all sites to be opened.

Use the **Trusted/Untrusted locations and names** window to determine trusted and untrusted elements. Click **Add** to add new elements. The following menu will be displayed:
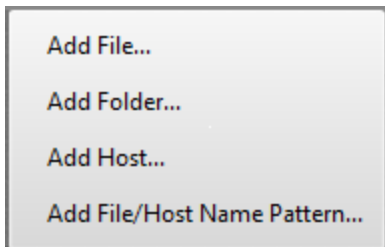

Figure 2. Add Trusted/Untrusted Options

- Click **Add File** to launch the **Add File** dialog box and add files from the local computer.
- Click **Add Folder** to launch the **Add Folder** dialog box and add folders from the local computer.
- Click **Add Host** to launch the **Add New Trusted/Untrusted Item** dialog box. Enter the internet address of the desired host and select **Trusted** or **Untrusted** as required. Then click **OK** to save the host.
- Click **Add File/Host Name Pattern** to specify a text pattern as either **Trusted** or **Untrusted.** Text patterns can include any text but are intended for use with file extensions.
- When trusted/untrusted locations and names are selected in the list, click **Edit** to edit their details.

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

Additional security options are available **here.** 206

6.2.7.18 JavaScript

JavaScript

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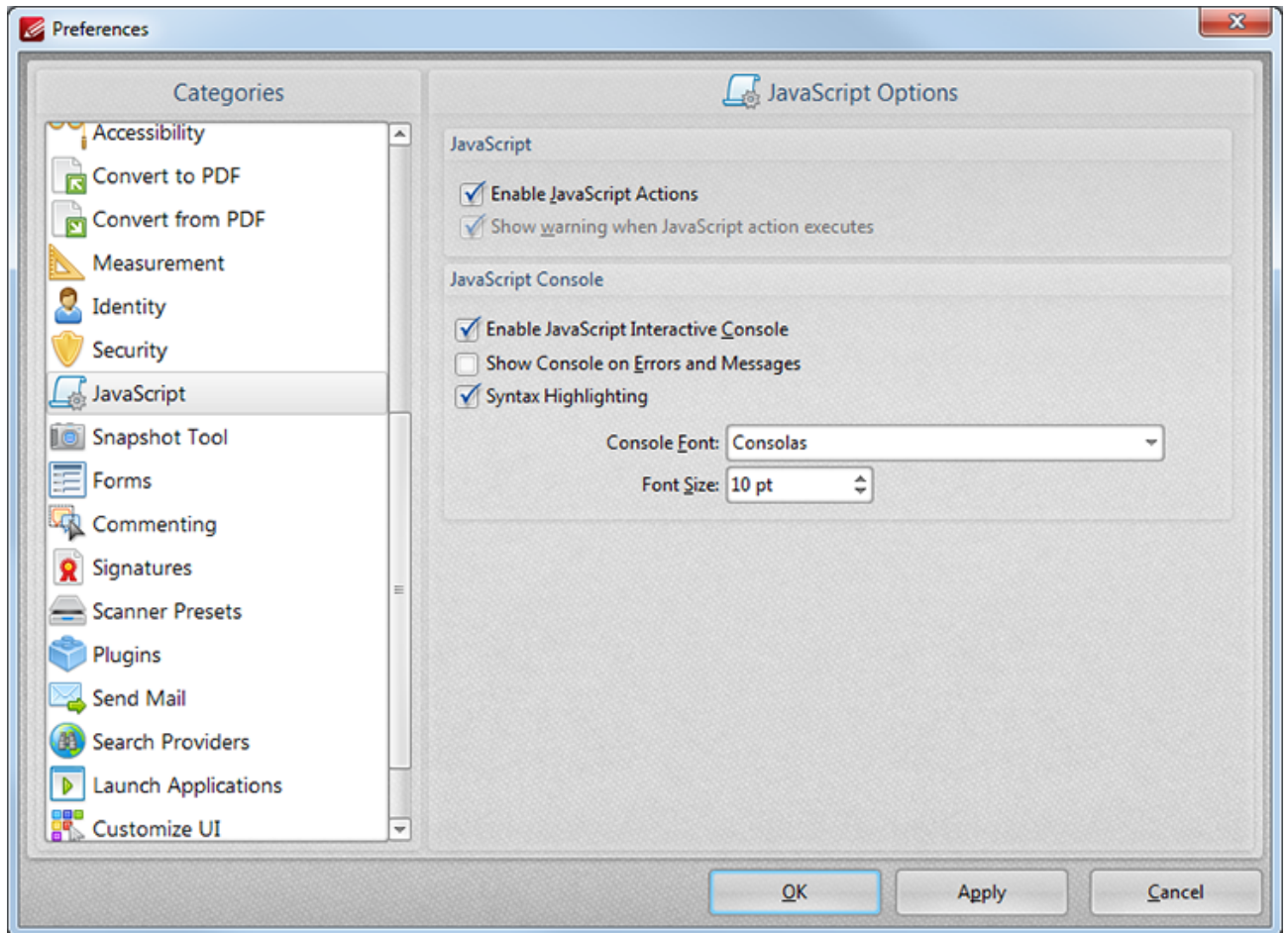

Figure 1. Preferences Dialog Box. JavaScript Tab Selected

These settings determine the **JavaScript** options in **PDF-XChange Editor:**

- Select the check boxes as desired in the **JavaScript** section.
- Select the **Enable Javascript Interactive Console** box to permit the user to view embedded JavaScript and execute JavaScript commands.

- Select the **Show Console on Errors and Messages box** to activate the console when an activated JavaScript encounters errors.
- Use the **Console Font** and **Font Size** menus to determine font settings in the **JavaScript Console,** which is detailed **here.** [526]

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

6.2.7.19 Snapshot Tool

Snapshot Tool

The **Snapshot Tool** is used to take snapshots of the active document. When it is enabled, click a page to take a screenshot. Alternatively, click and drag the pointer to select a custom rectangular area of the document. Release the button to take the snapshot. When a snapshot is taken, a bitmap copy of the selection is pasted to the clipboard.

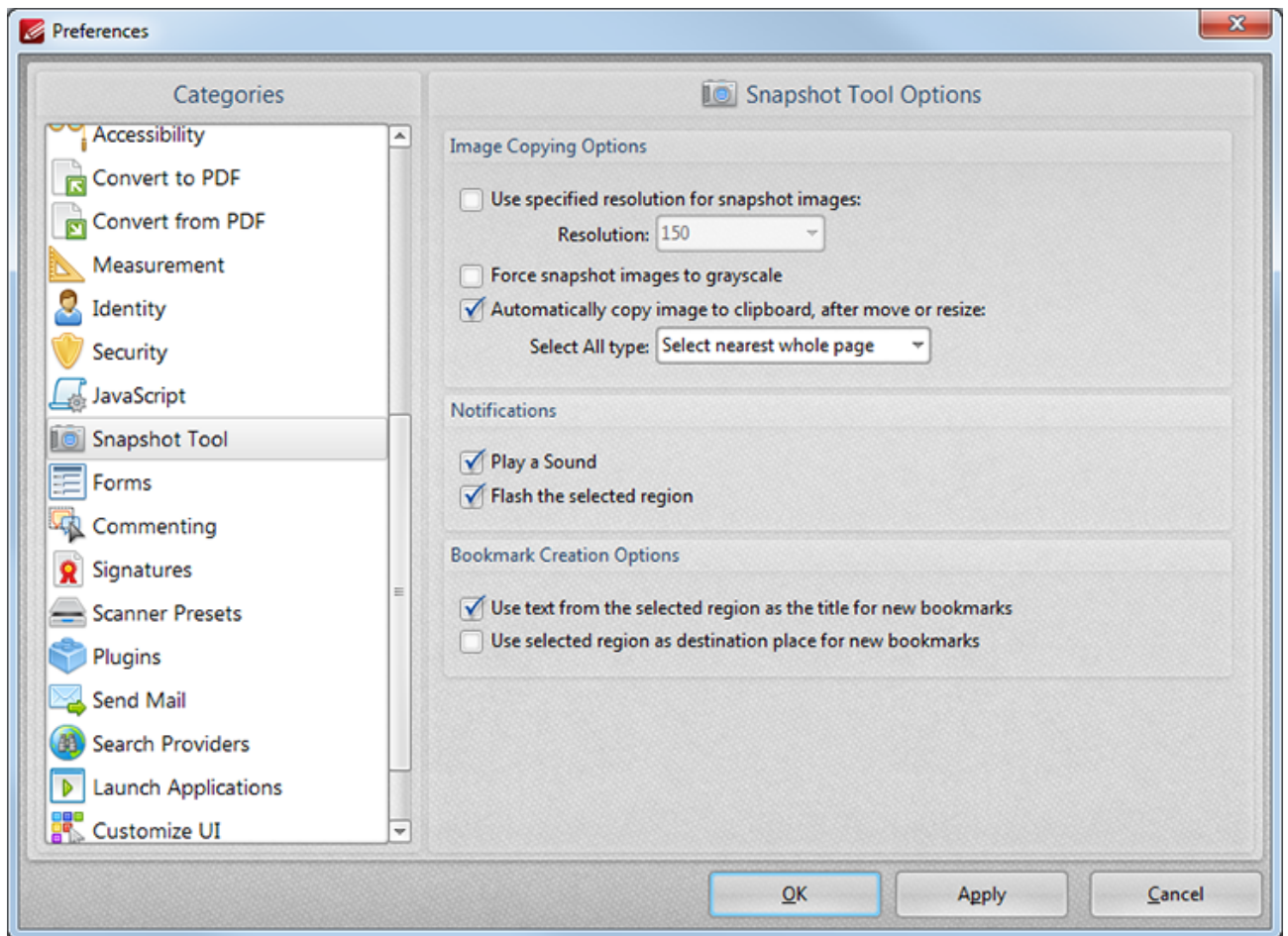When the **Snapshot Tool** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Snapshot Tool Tab Selected

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

- Specify a resolution for images using the **Resolution** menu.
- Select the **Force snapshot images to grayscale** box as desired.
- Select the **Automatically copy image to clipboard after move or resize** box as desired.
- Use the **Select All type** menu to determine the **Select All** setting. This option is available in the right-click submenu 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 to enable the features indicated.

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

6.2.7.20   Forms

Forms

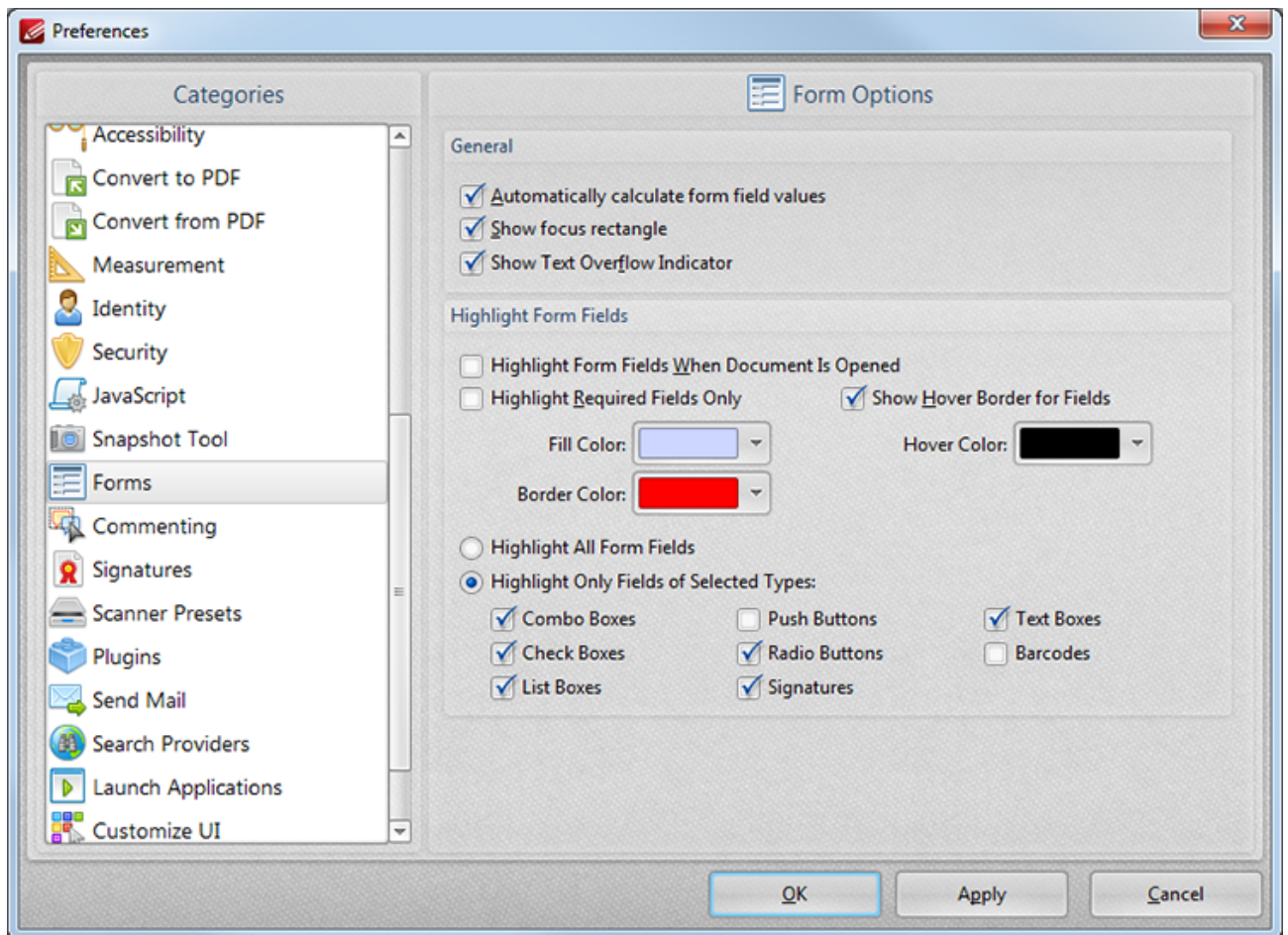When the **Forms** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Forms Tab Selected

These settings determine the options for forms within **PDF-XChange Editor.** The options in the **General** tab are as follows:

- Select the **Automatically calculate form field values** box for form field calculations to be performed automatically when they are entered.

- Select the **Show focus rectangle** box to highlight the form field that currently has focus.
- Select the **Show text overflow indicator** box as desired.

The options in the **Highlight Form Fields** section are as follows:

- Select the **Highlight Form Fields When Document Opened** box as desired.
- Select the **Highlight Required Fields Only** box as desired. Fields designated as required must be filled before documents can be submitted. See **here** 322 for information on how to designate forms as required forms.
- Select the **Show Hover Border for Fields** box as desired.
- Select colors as the **Fill Color, Border Color** and **Hover Color**.
- Select the **Highlight All Form Fields** option button as desired.
- Alternatively, select the **Highlight Only Fields of Selected Types** option button and select the relevant boxes.

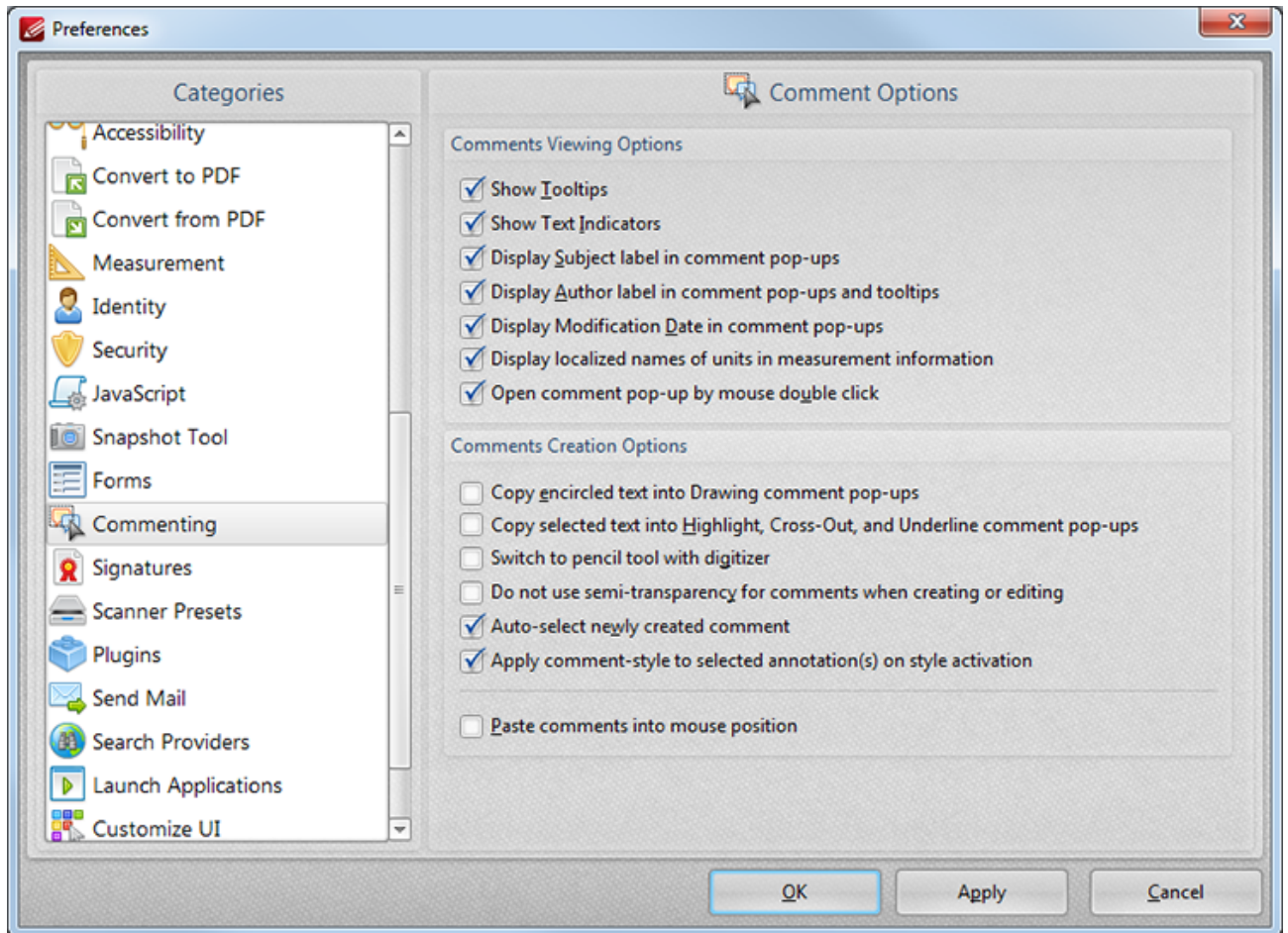Click **Apply** to apply changes and **OK** to save changes.

6.2.7.21 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 **Copy encircled text into Drawing comment pop-ups** box as desired. This is intended for use with the shape annotations. If it is selected then the text around which they are created will be automatically posted into the associated pop-up note of the annotation.
- Select the **Copy selected text into Highlight, Cross-Out, and Underline comment pop-ups** box as desired. Text that the **Highlight, Strikeout** and **Underline Text** tools are used to annotate will automatically be copied into annotation pop-ups when this option is enabled.
- Select the **Switch to pencil tool with digitizer** box as desired.
- Select the **Paste Comment into mouse position** box to paste copied comments at the position of the pointer.

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

6.2.7.22 Signatures

Signatures

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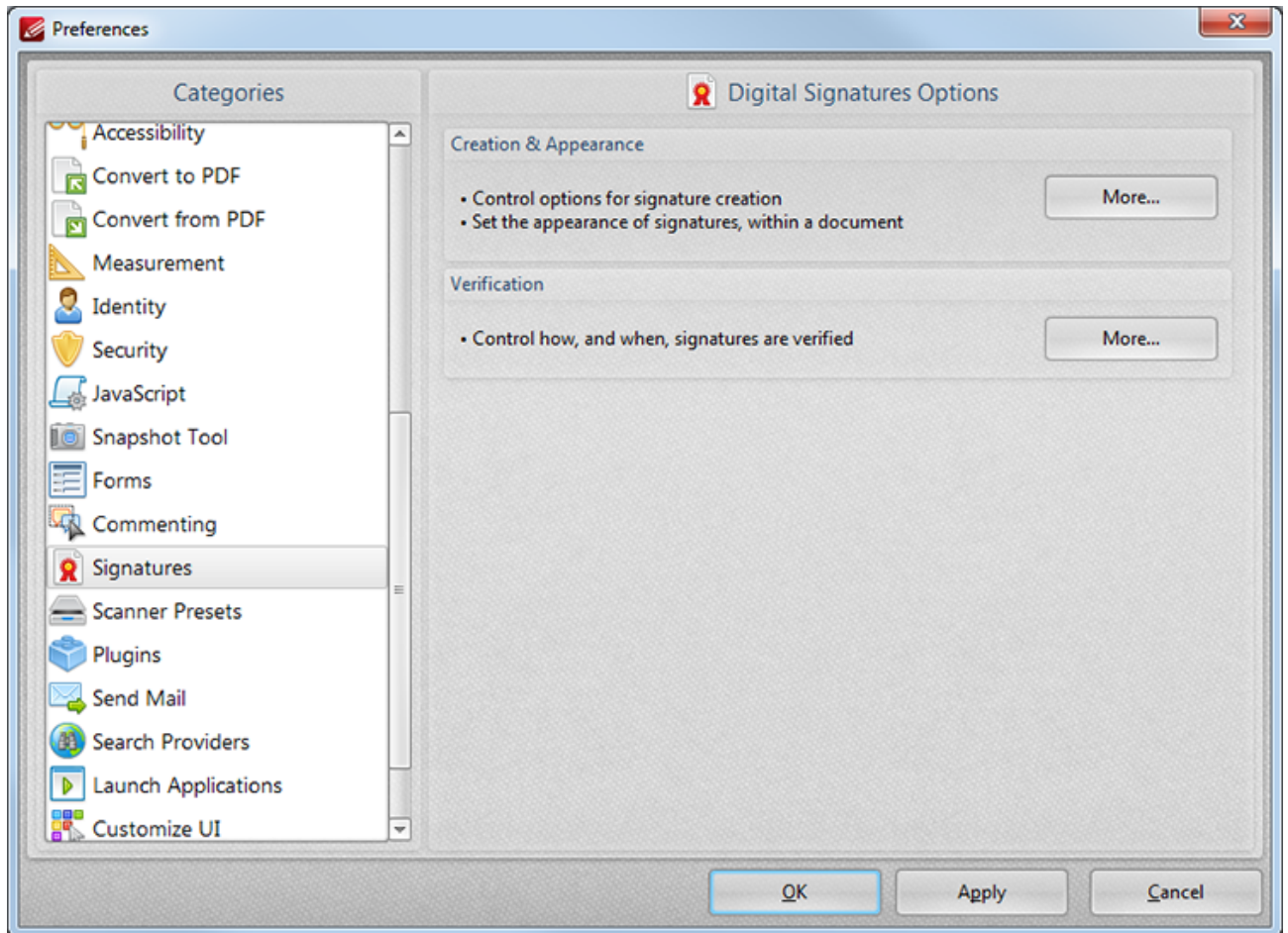
Figure 1. Preferences Dialog Box. Signatures Tab Selected

These options determine the settings for digital signatures.

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

- The **Verification** settings determine how and when signatures are verified. Click the **More** button to access these settings. There are two options - select the check boxes as desired.
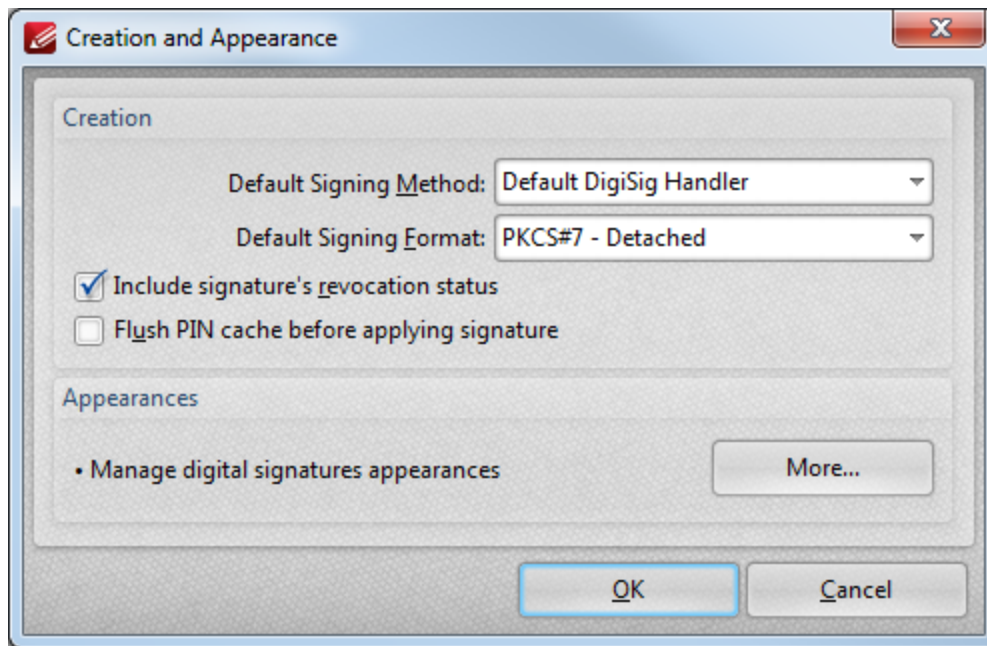
Figure 2. Creation and Appearance Preferences Dialog Box

The **Creation** settings are as follows:

- Select an option from the **Default Signing Method** menu to determine the default signing method settings.
- Select an option from the **Default Signing Format** menu to determine the signing format.
  - **PKCS#7 - Detatched** encodes certificates in **Abstract Syntax Notation One (ASN.1) format.**
  - **CAdES** is an electronic signature created in compliance with **eIDAS** and has the same legal value as a handwritten signature.
- Select the **Include signature's revocation status** box as desired. When selected, the revocation status of the signature will be shown in the main window.
- Select the **Flush PIN cache before applying signature** box as desired.
- Click the **More** button to set the **Digital Sign Appearance Templates.** The following dialog box will open:
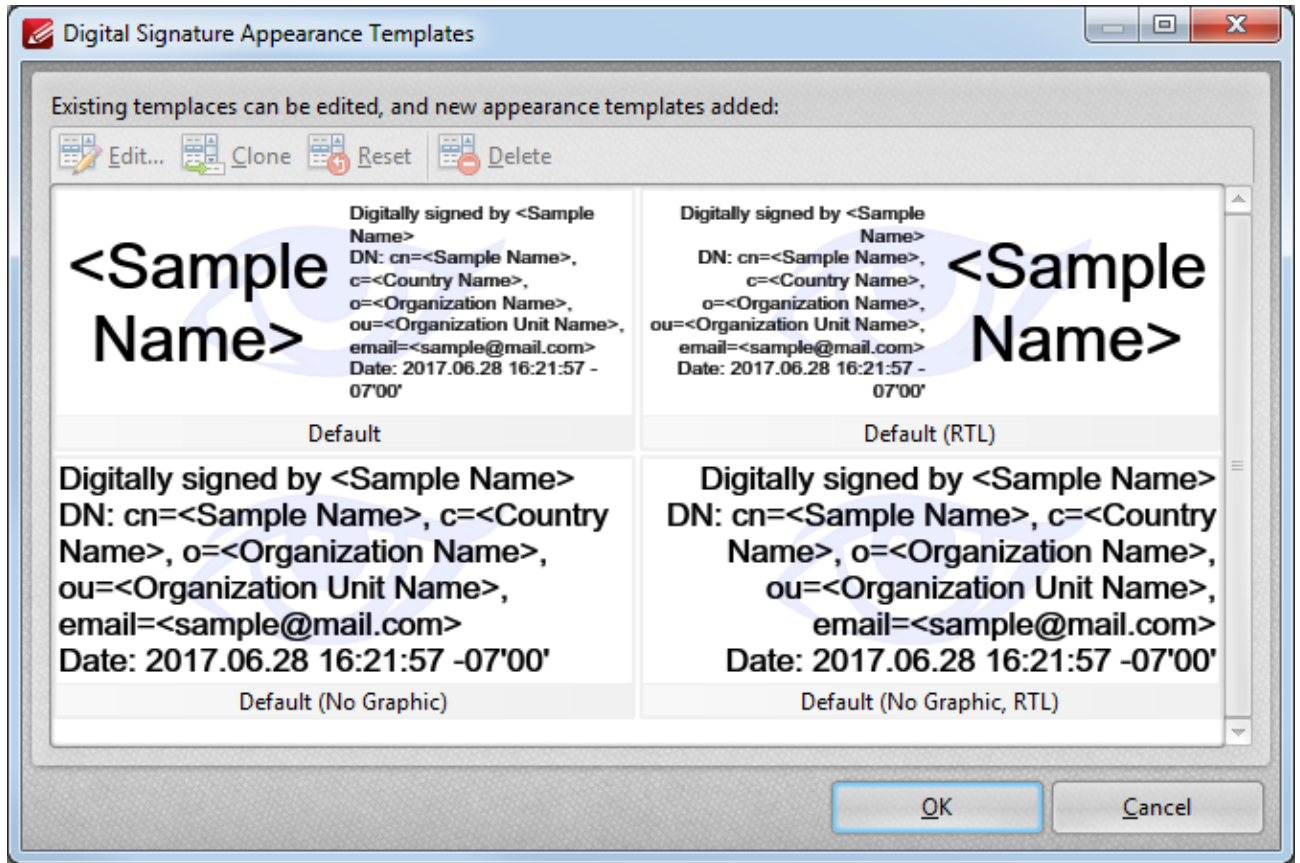
Figure 3. Digital Sign Appearance Templates Dialog Box

- When this dialog box is first launched the default values are given, as in *(figure 3)* above. Signatures can be created with or without graphics and in standard layout or **RTL** (right to left) layout. Select the tab of the signature format to be edited. The options to **Clone, Reset** and **Edit** will then be enabled.
- Click **Clone** to clone the selected signature. It will then appear in the dialog box. This is a useful feature if parameters of existing signatures need to be changed and saved without editing the original.
- Click **Reset** to revert the values of the the selected signature to their default settings.
- Click **Edit** to change the values of the selected signature. The following dialog box will open:
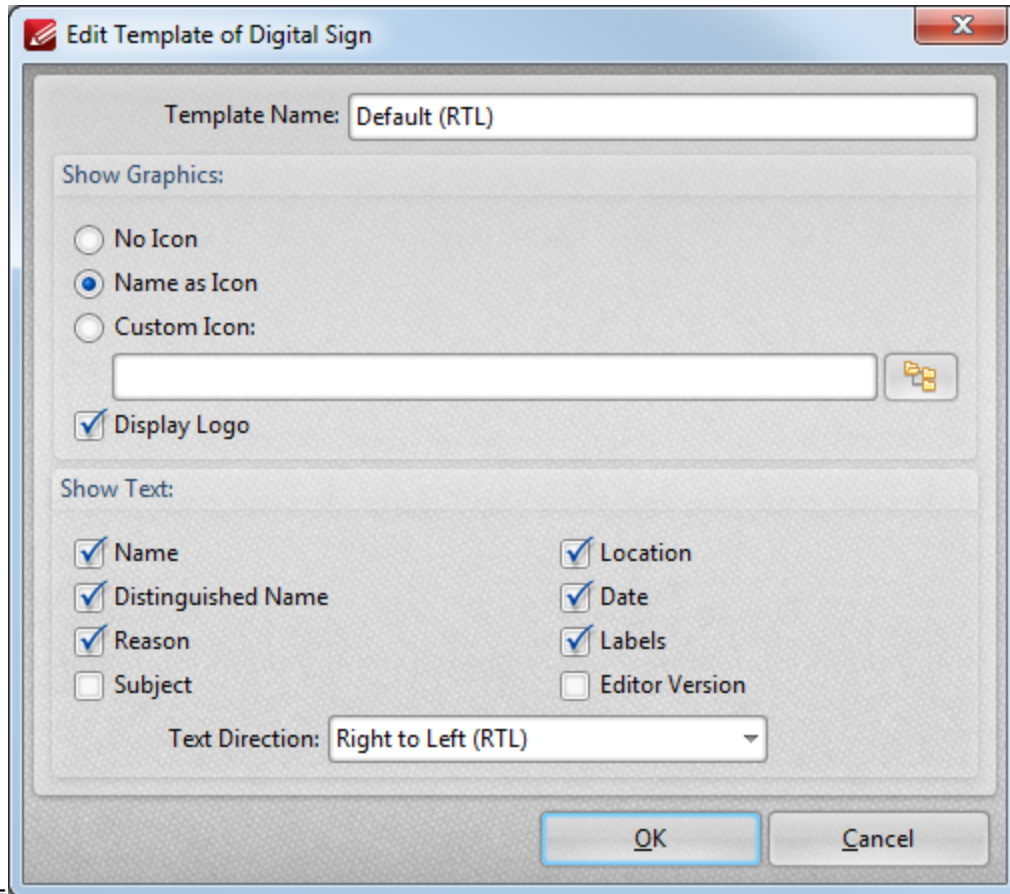
Figure 4. Edit Template of Digital Sign Dialog Box

- Enter a name for the template in the **Template Name** text box.
- Use the **Show Graphics** option buttons to determine the graphics that are shown with the template:
  - Select **Name as Icon** to use the name of the current user as the icon.
  - Select **Custom Icon** to use a custom icon. Enter the name of the file to be used in the text box or click the icon to select a file from the local computer.
- Select the **Display Logo** box to display logos in the background of templates.
- Select the boxes in the **Show Text** section to determine the information that is shown with templates.
- Use the **Text Selection** menu to determine the text direction.

When the desired parameters have been selected, click **OK** to apply them. Then, in the **Preferences** dialog box, click **Apply** to apply changes. Click **OK** to save changes.

6.2.7.23   Scanner Presets

Scanner Presets

When the **Scanner Presets** tab is selected the following options are available:
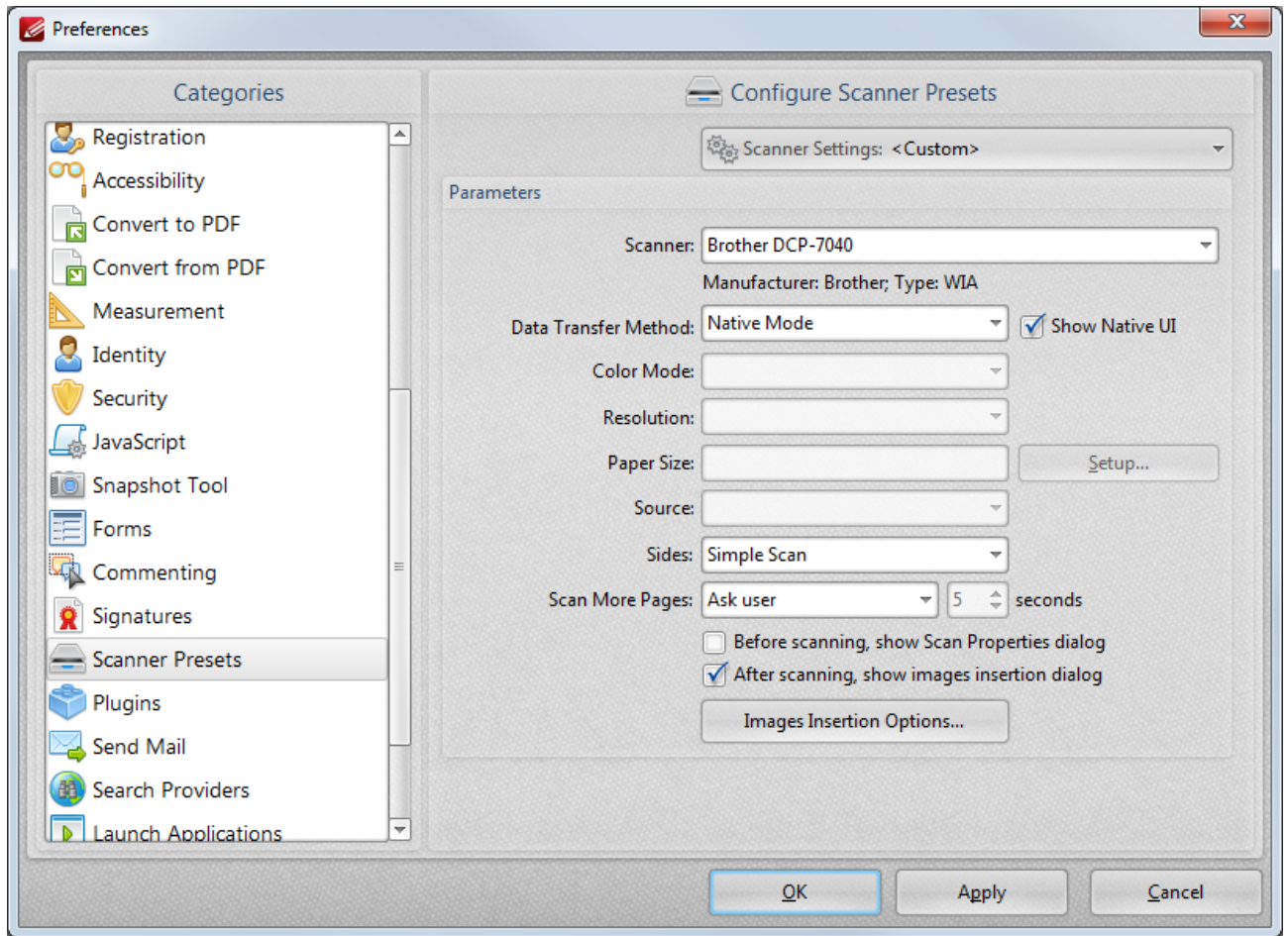

Figure 1. Preferences Dialog Box. Scanner Presets Tab Selected

These settings determine the presets for scanning:

- Click the **Scanner Settings** menu to select a preset scanning mode.
- Click the **Scanner** menu to select a scanner to use.
- Click the **Data Transfer Method** menu to select either **Native Mode** or **Memory Mode:**

- **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 **Before scanning, show Scan Properties dialog** box to view scan properties before scans take place.
- 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.** [178]

When custom settings have been entered they can be saved using the **Scanner Settings** menu. Click **Save Current Settings** to create a custom profile for subsequent use. Click **Manage** to manage previously saved profiles and **Delete** to remove the profile currently selected.

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

6.2.7.24   Plugins

Plugins

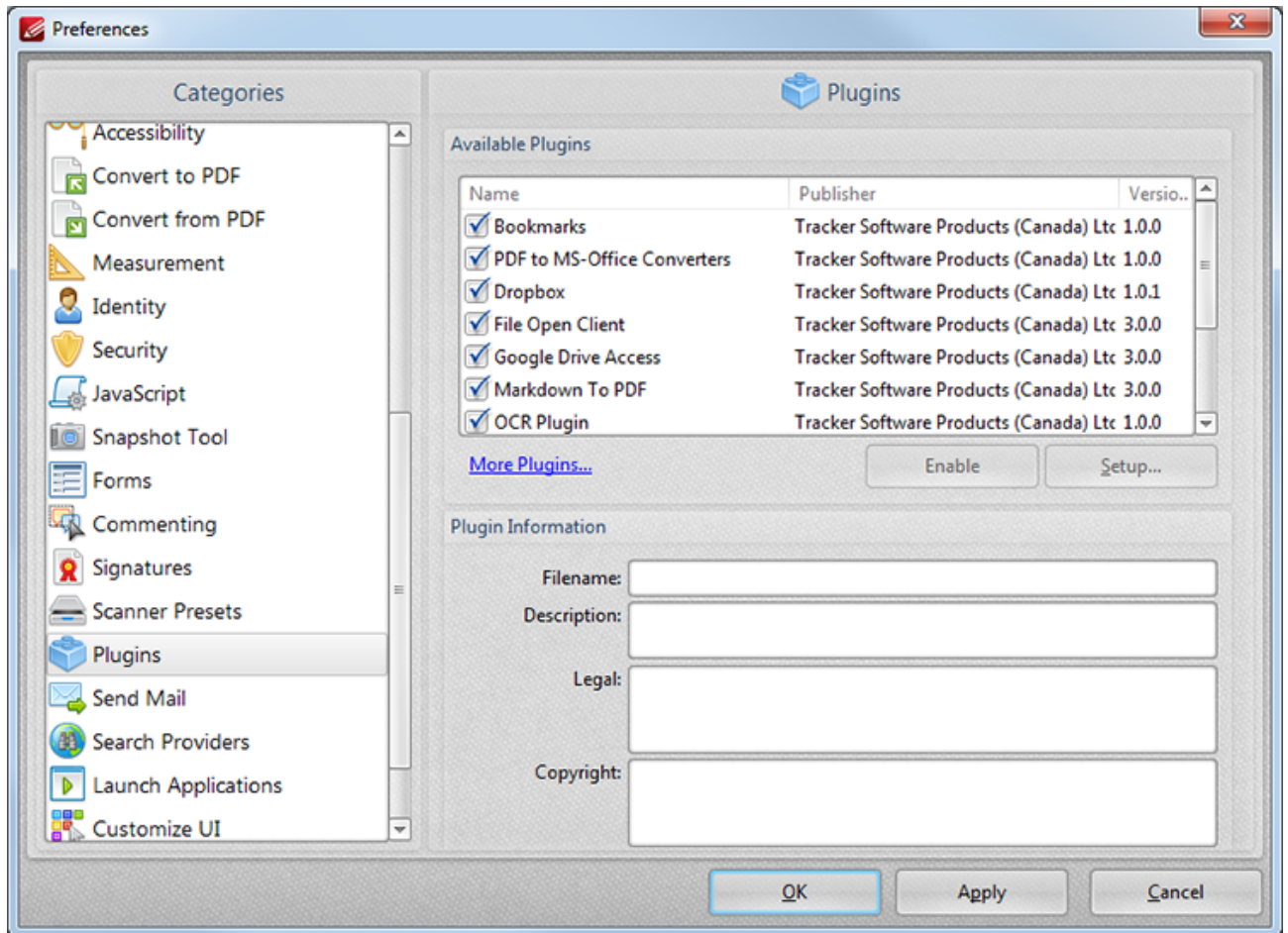When the **Plugins** tab is selected the following options are available:

Figure 1. Preferences Dialog Box. Plugins Tab Selected

This dialog box shows plugins available to use in conjunction with **PDF-XChange Editor.**

- Select a plugin from the list to view its details in the **Plugin information** section.
- Click the **Enable/Disable** buttons to enable/disable selected plugins.
- Click **More plugins** to view further plugins available from **PDF-XChange.**

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

6.2.7.25 Send Mail

Send Mail

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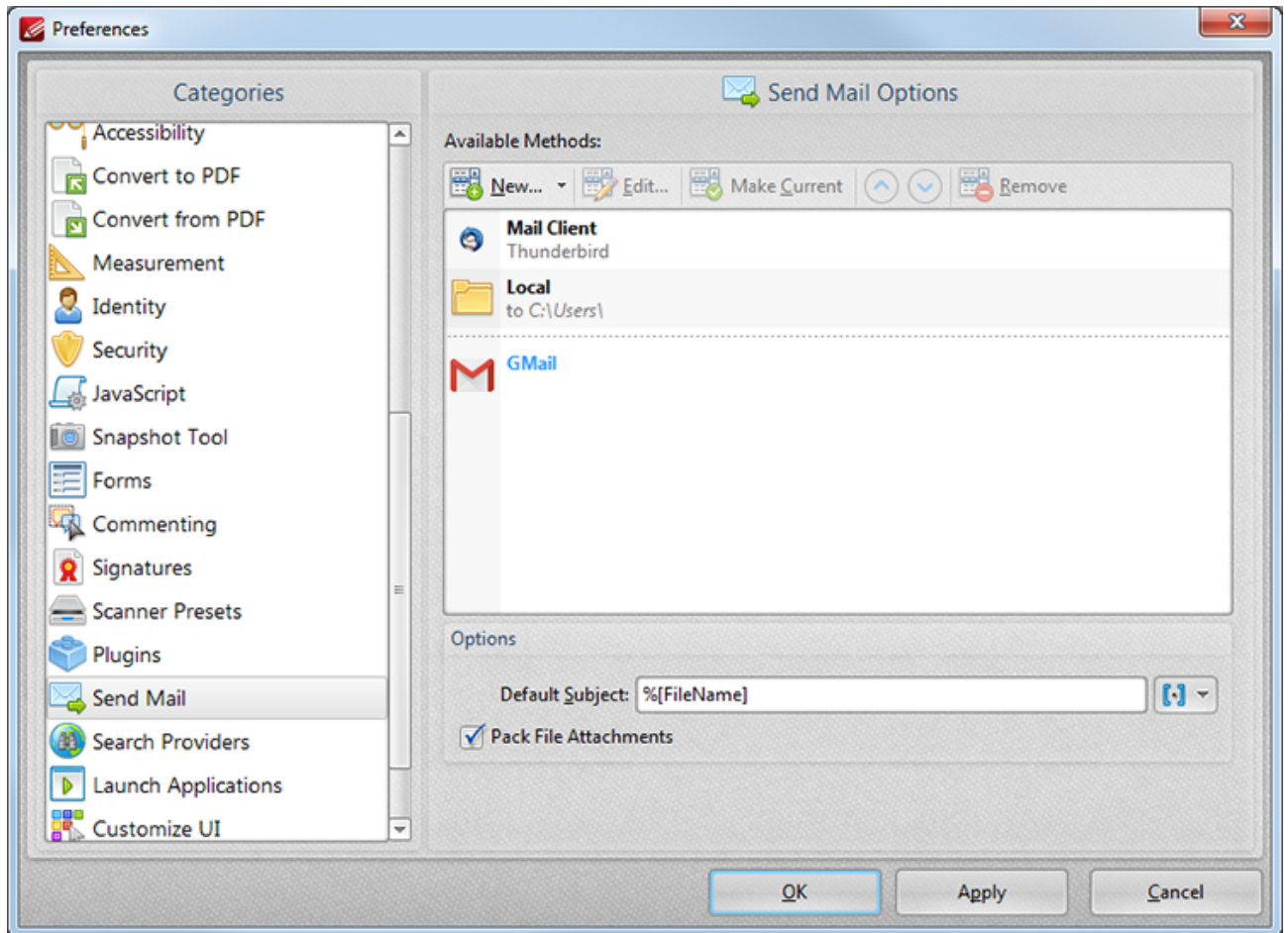
Figure 1. Preferences Dialog Box. Send Mail Tab Selected

These settings determine how files are sent using the email feature of **PDF-XChange Editor.** Existing email methods are displayed in the **Available Methods** pane.

- Click **New** to add new email methods. Select **SMTP, Gmail, Yahoo, Hotmail, Outlook** or **Mail.ru** to add an associating emailing method to the pane.

- Click **Edit** to edit selected email methods.
- Click **Make Current** to make the selected email method active for the **Send by Email** ⎙190 feature.
- Click **Remove** to remove the selected email method.
- Use the **Default Subject** text box to determine the automated subject line of emails. **Macros** ⎙830 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.

6.2.7.26 Search Providers

Search Providers

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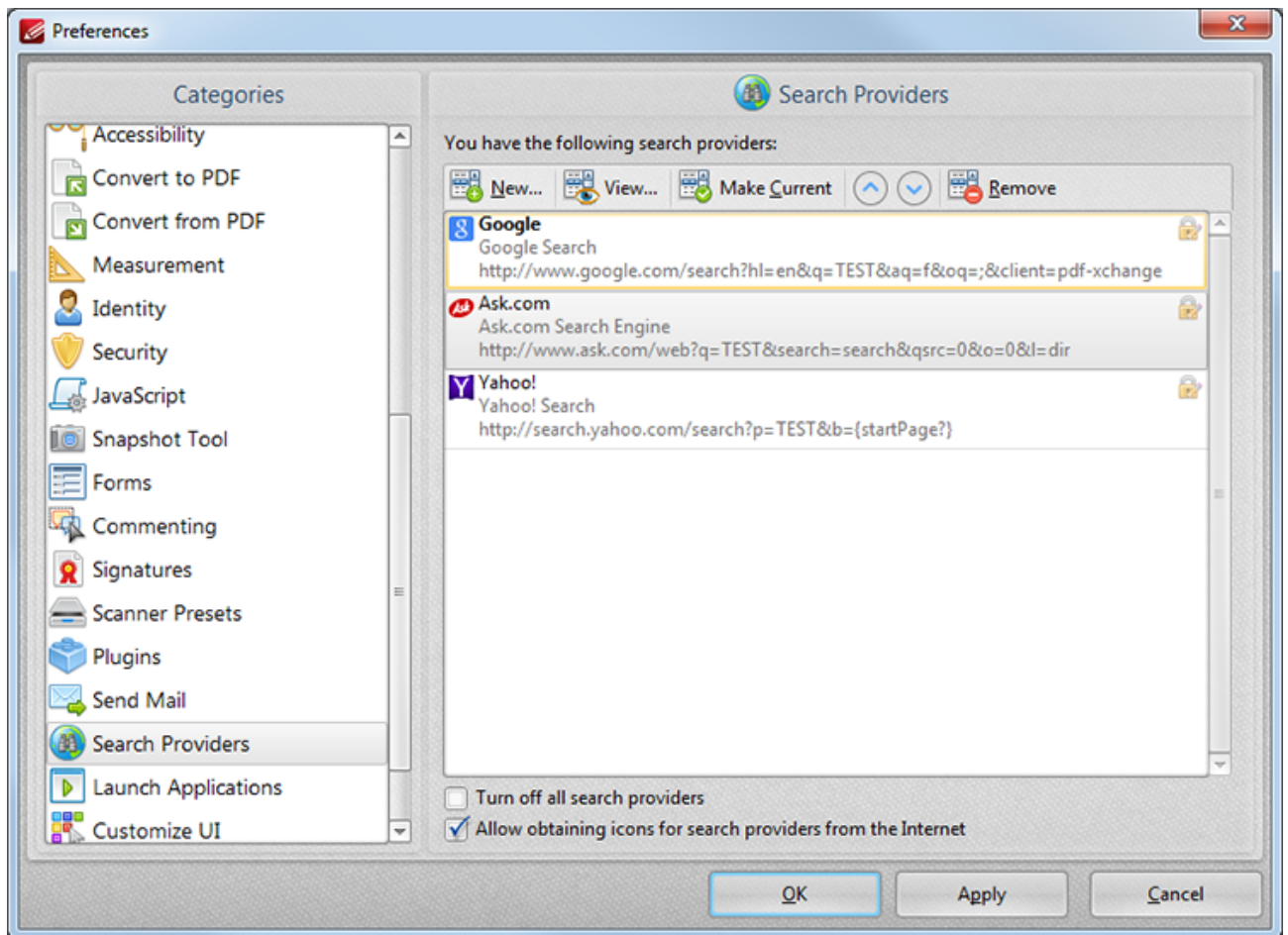
Figure 1. Preferences Dialog Box. Search Providers Tab Selected

This setting shows a list of the search providers currently used on the local computer.

- Click the **New** button to add a new search provider. Follow the on-screen instructions.
- Click the **Edit** button to edit the search provider currently selected.

- Click the **Make Current** button to set the search provider currently selected as the default search provider.
- Use the arrows to move the search provider currently selected up or down in the display window.
- Use the trashcan icon to remove the search provider currently selected.
- Select the **Turn off all search providers** box to disable all search providers.
- Select the **Allow obtaining icons for search providers from the Internet** option to permit the software to obtain search provider icons.

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

6.2.7.27 Launch Applications

Launch Applications

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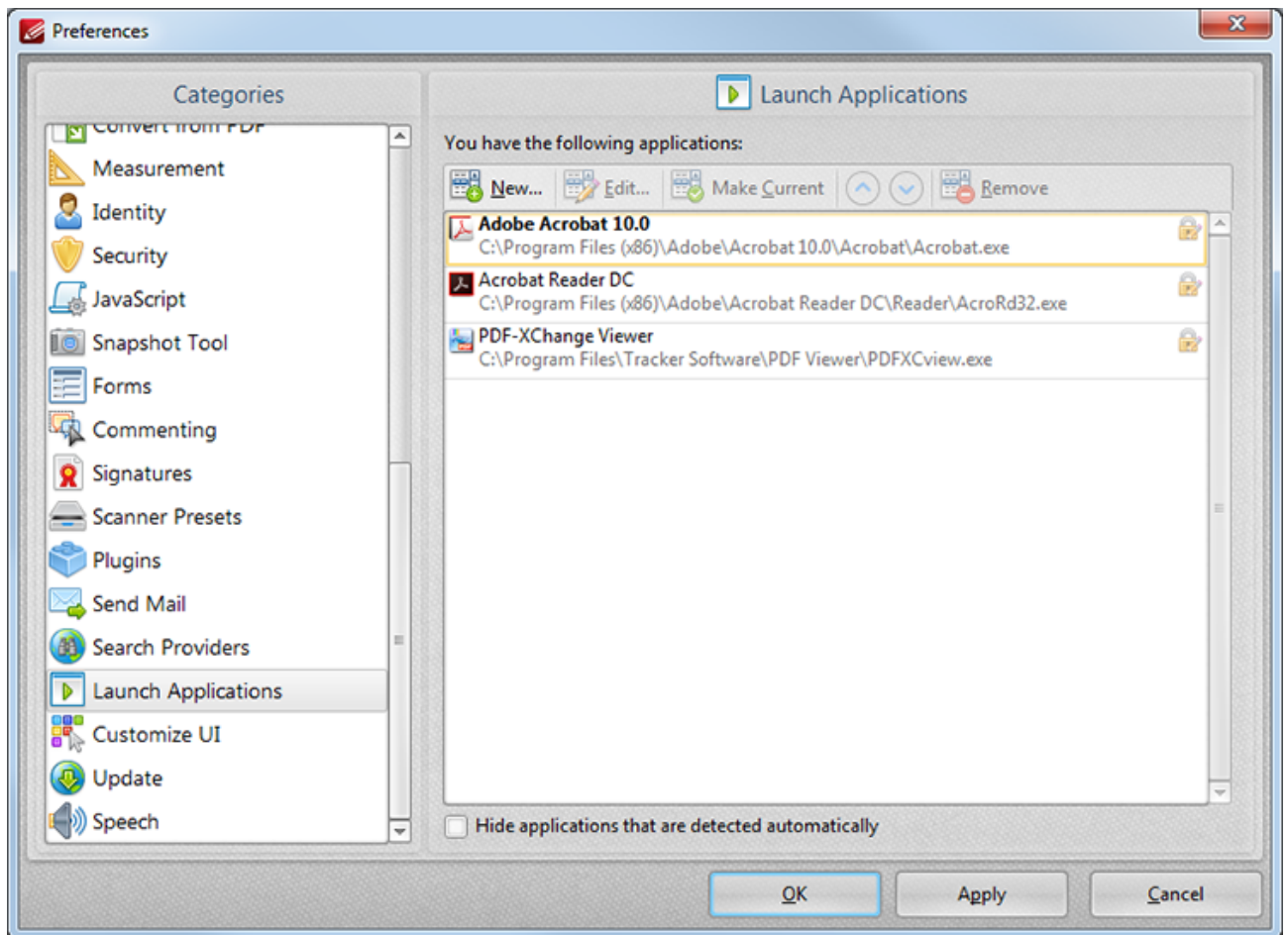
Figure 1. Preferences Dialog Box. Launch Applications Tab Selected

This setting displays the list of third-party applications currently featured in the **Launch Applications Toolbar.** 482 This toolbar provides a convenient way to open active documents using third party applications. Follow the instructions below to add new applications/edit existing applications:

- Click **New** to add a new application. The dialog box in *(figure 2)* will open.

- Click **Edit** to edit an existing application.
- Click **Make Current** to set the application currently selected as the default application.
- Use the arrows to move the search launch application currently selected up or down in the window.
- Use the trashcan icon to remove the application currently selected.
- Select the **Hide applications detected automatically** box as desired.
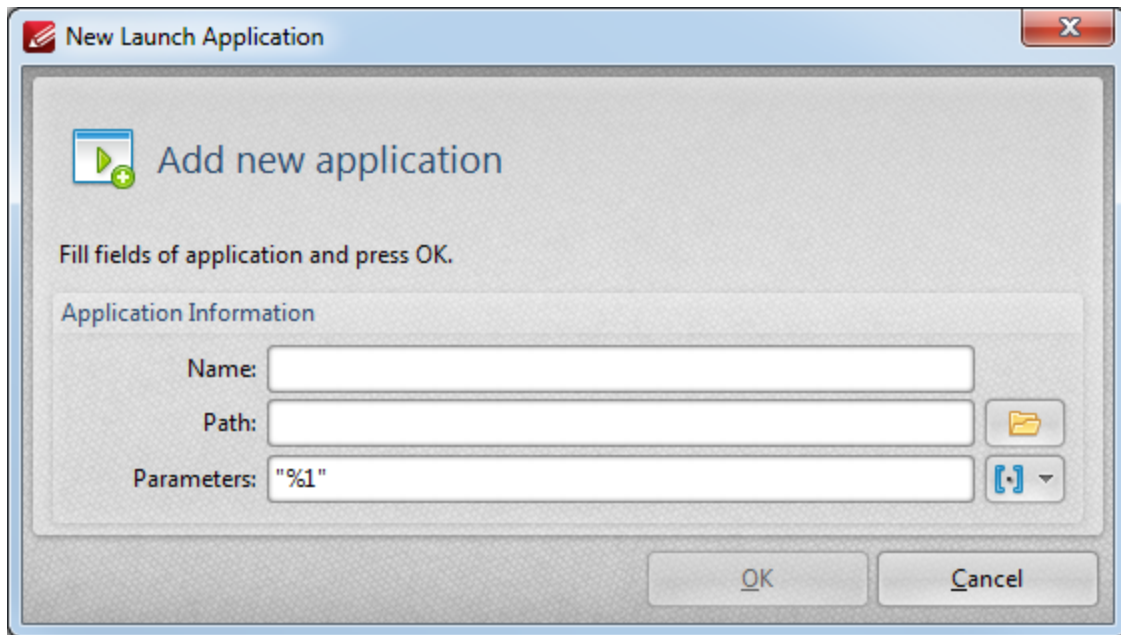
Figure 2. New Launch Application Dialog Box

- Enter a name for the launch application in the **Name** text box.
- Enter the path executable in the **Path** text box, or use the folder icon to select the application manually. Add the desired parameters to the application. These parameters are variables that result in the retention of specific document values when they are moved to the command that launches third-party applications. The available parameters are **macros.** [830] 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to a corresponding output sequence. Enter macros in the **Parameters** text box as desired. Alternatively, use the icon to select them manually. The following parameters are available for all applications:
    - **File name,** which uses the variable %1 and inherits the file name and path. This is the only parameter that is required in all cases and it must be contained in double quotation marks.
    - **Zoom,** which uses the variable %z and inherits the zoom level.
    - **Page Number,** which uses the variable %p and inherits the current page number.
    - **Page (0-base numeration),** which uses the variable %p0 and inherits the first numerical page number that starts at 01, 02 etc.
    - **Position X (in pixels),** which uses the variable %vx and inherits the position viewed position viewed along the x axis.

- **Position Y (in pixels),** which uses the variable %vy and inherits the position viewed position viewed along the y axis.
- **Position X (in pt),** which uses the variable %px and inherits the position viewed position viewed along the x axis in pt.
- **Position Y (in pt),** which uses the variable %py and inherits the position viewed position viewed along the y axis in pt.
- **View Rotation,** which uses the variable %vr and inherits the rotation status of documents.
- Further macros than those detailed above are available, but it is necessary to use the launch commands of the application in question. For example, if **PDF-XChange Viewer** is being used, the launch command to open a file to a specific page is **/A "page=<page_number>".** Therefore the parameter **/A "page=%p" "%1"** would be used, where the desired page number is entered as the **%p** variable and the file name is entered as the **%1** variable. If more than one parameter is being used then parameters must be separated with an **"&"** symbol. Please note that some applications may not support the use of parameters.
- Click **OK** to add new applications.

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

6.2.7.28 Customize UI

![PDF-XChange Editor icon]**Customize UI**

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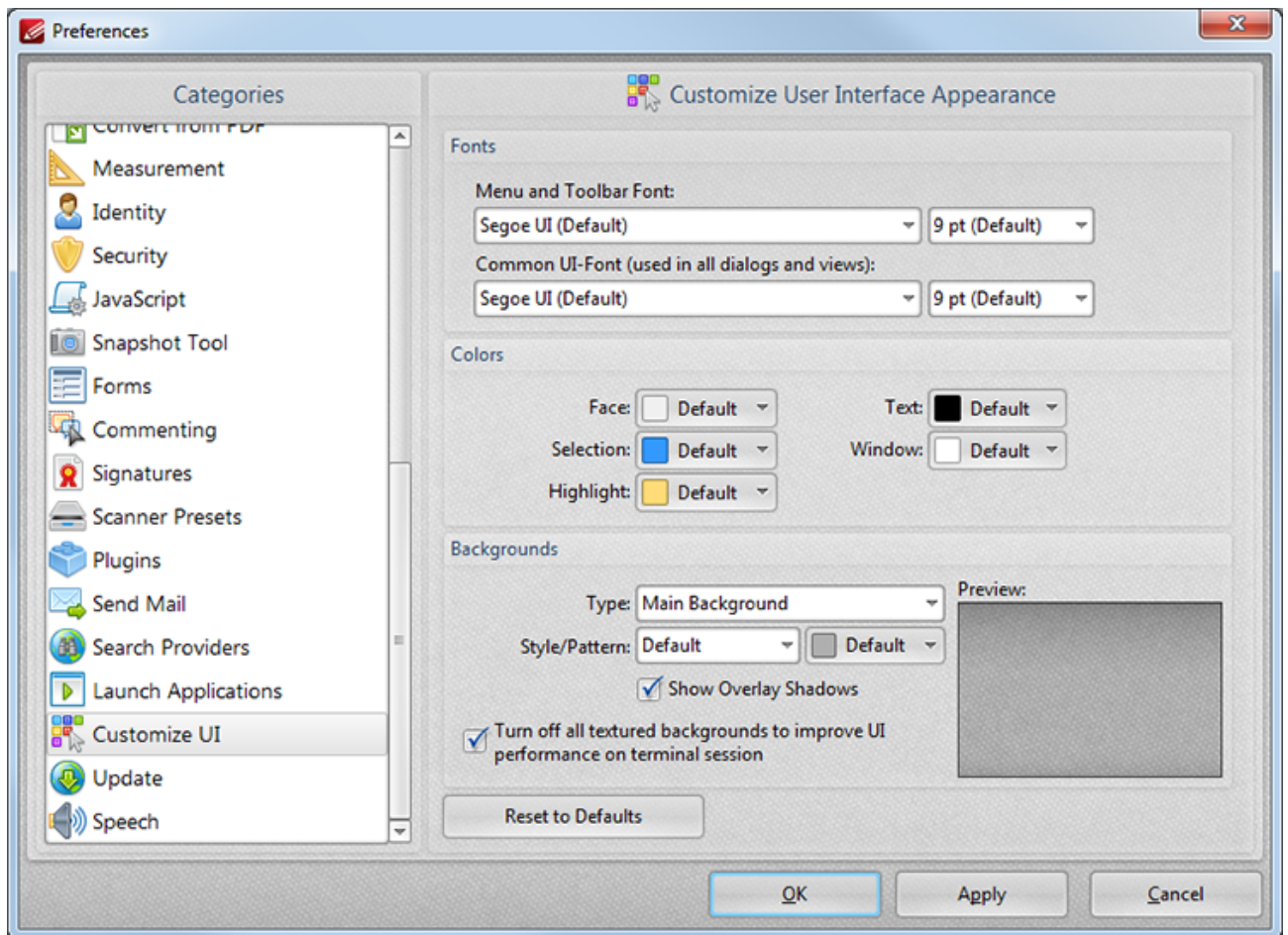
Figure 1. Preferences Dialog Box. Customize UI Tab Selected

These settings determine the appearance of the user interface:

- Use the menus in the **Fonts** section to determine the font style and size for menus, toolbars and general usage.
- Use the menus in the **Colors** section to determine the color of fonts at the locations indicated.

- Use the menus in the **Backgrounds** section to determine the UI display for backgrounds:
  - Use the **Type** menu to select the background to customize.
  - Use the **Style/Pattern** menus to select the style and color of the background.
  - Select the **Show Overlay Shadows** text box as desired.
  - Select the **Turn off all textured backgrounds to improve UI performance on terminal session** box as desired.

It is also possible to customize toolbars in **PDF-XChange Editor.** Those settings are explained <u>**here.**</u> [486]

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

6.2.7.29 Update

Update

The **Update** tab is used to check for software updates. Click the **Check for Updates Now** button to search automatically for updates.

6.2.7.30 Speech

Speech

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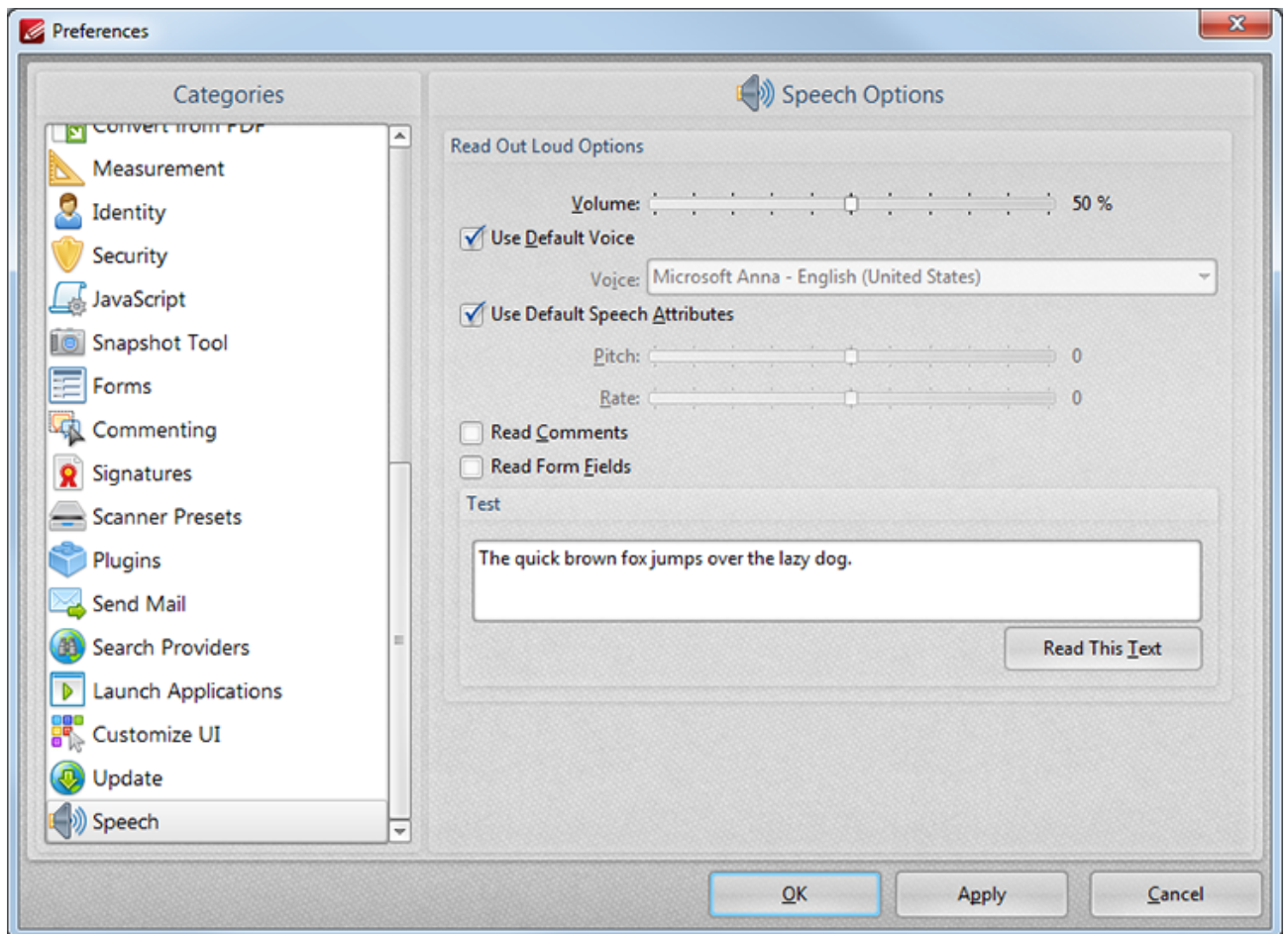
Figure 1. Preferences Dialog Box. Speech Tab Selected

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

- Select the **Use default voice** box as desired. If this box is not selected then it is possible to choose an alternative voice from the **Voice** menu.
- Select the **Use default speech attributes** box as desired. If this box is not selected then the **Pitch** and **Rate** options can be adjusted manually.
- Select the **Read comments** and **Read Form Fields** boxes as required.
- Use the **Test** text box to test customized settings. Enter sample text into the text box and click the **Read this text** button to test settings.

Instructions on how to use the read out loud feature are available **here.** [861]

Click **Apply** to enable adjusted parameters. Click **OK** to save settings.

6.3   View

View

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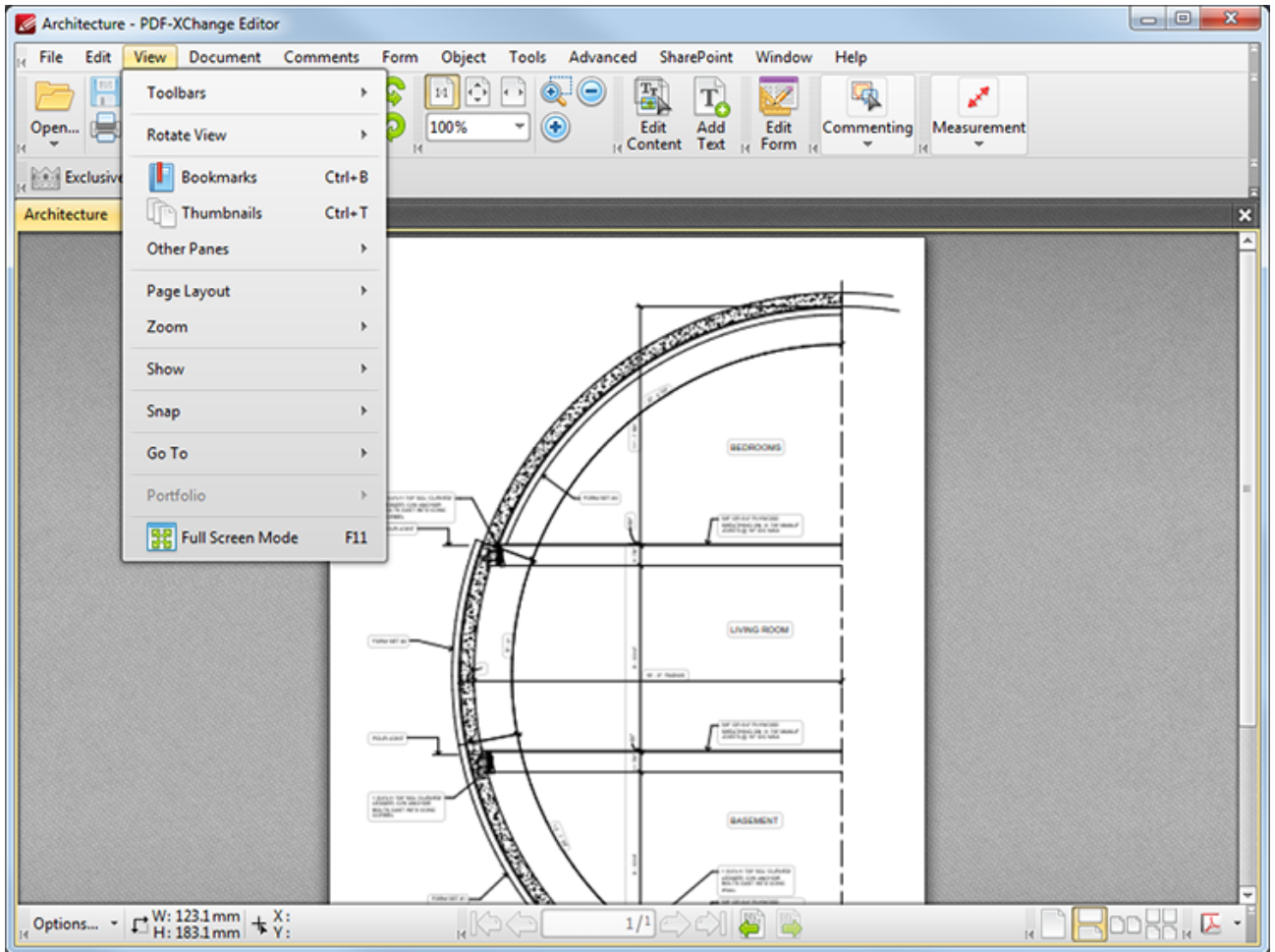
Figure 1. View Tab Submenu

These options determine the viewing settings for specific elements of **PDF-XChange Editor.** Click the links below to access the associated sections of the manual:

- **Toolbars**

- **Rotate View** 492
- **Bookmarks** 493
- **Thumbnails** 497
- **Other Panes** 501
- **Page Layout** 522
- **Zoom** 524
- **Show** 525
- **Snap** 528
- **Go To** 530
- **Portfolio** 531
- **Full Screen Mode** 533

Additionally, see the **Document Operations Guide** 66 for further information and step-by-step instructions to using these features.

6.3.1   Toolbars

Toolbars

Hover over **Toolbars** to determine toolbar settings:
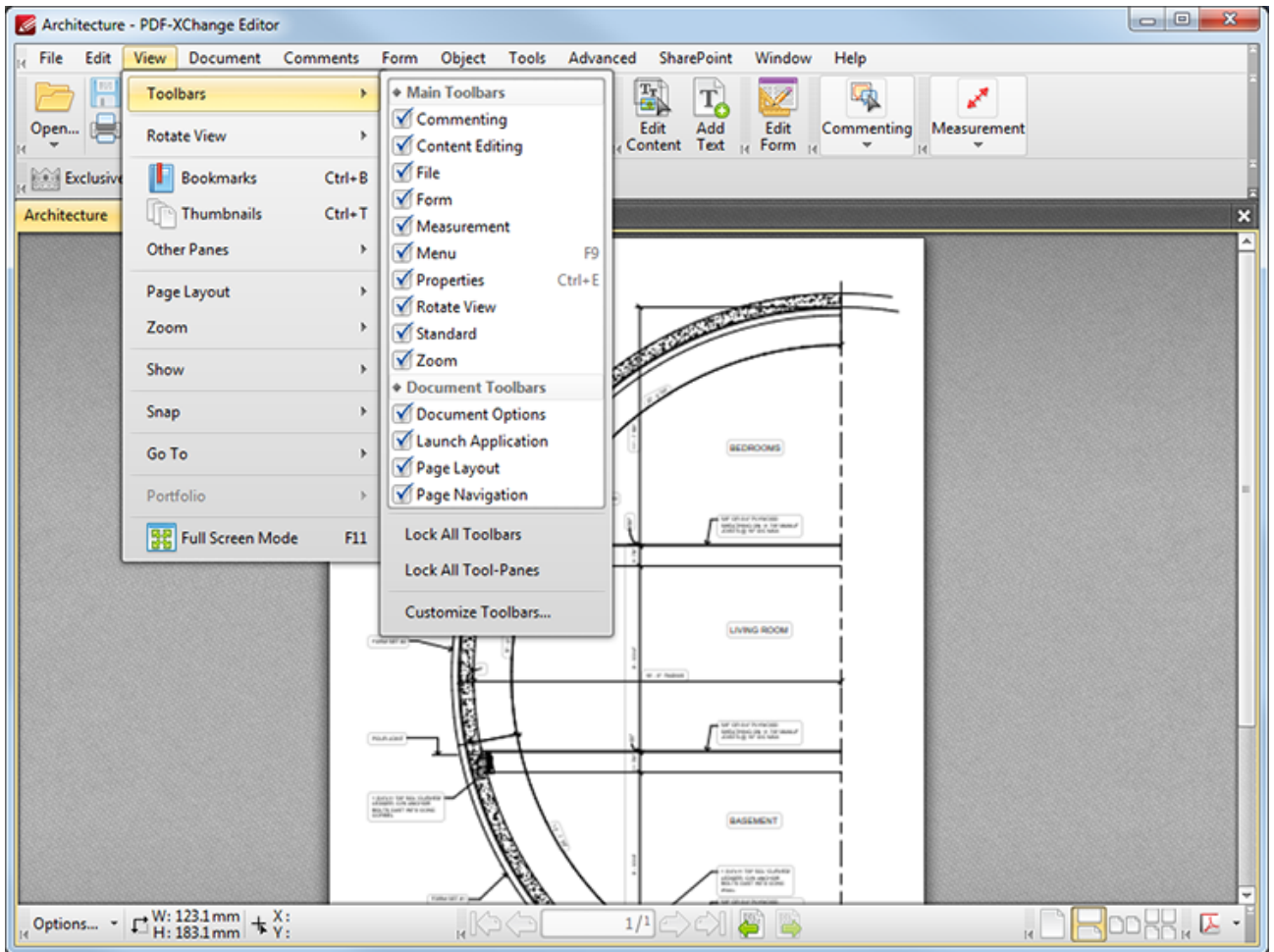
Figure 1. Toolbars Options

- 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.
- Press F8 to show/hide all toolbars.

- There are two icons on the left of each toolbar:
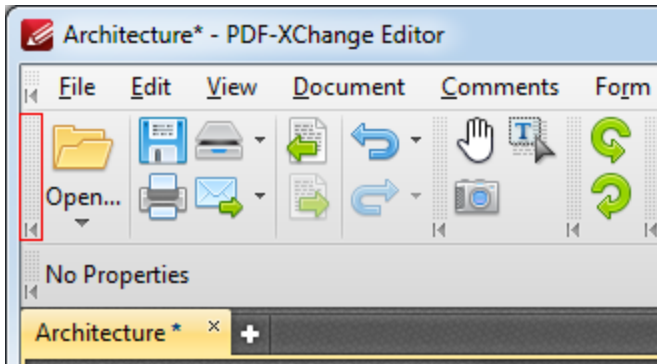
Figure 2. Toolbar Icons

- Click the arrow icon to expand/collapse toolbars.
- Hover the pointer over the dotted area above arrow icons 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 reduced repositioning options in comparison to 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 added to the interface. For example in *(figure 3)* the **File Toolbar** has been repositioned to the lower part of the workspace:
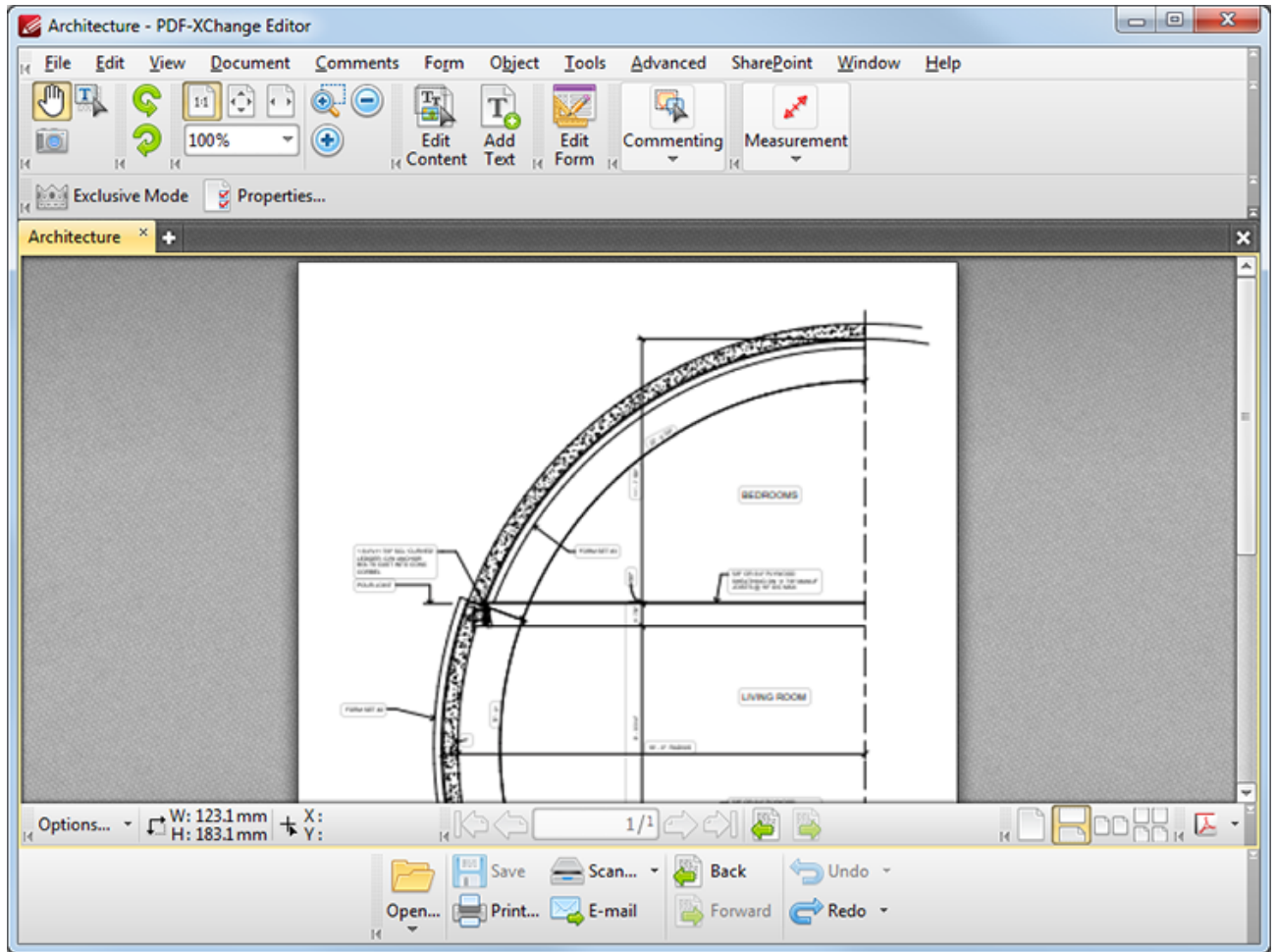
Figure 3. PDF-XChange Editor Main Window, File Toolbar Repositioned

A breakdown of all toolbars within **PDF-XChange Editor** is detailed below:

The **Shortcut Toolbar** is located at the top of the main window:
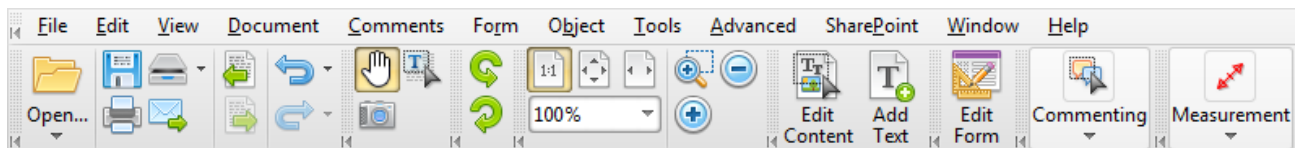
Figure 4. Shortcut Toolbar

This toolbar is composed of several toolbars:

The **Commenting Toolbar** contains options for adding/editing comments:
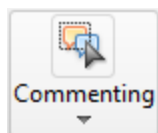
Figure 5. Commenting Toolbar

See **here** 471 for further information.

The **Content Editing Toolbar** contains options for editing the content:
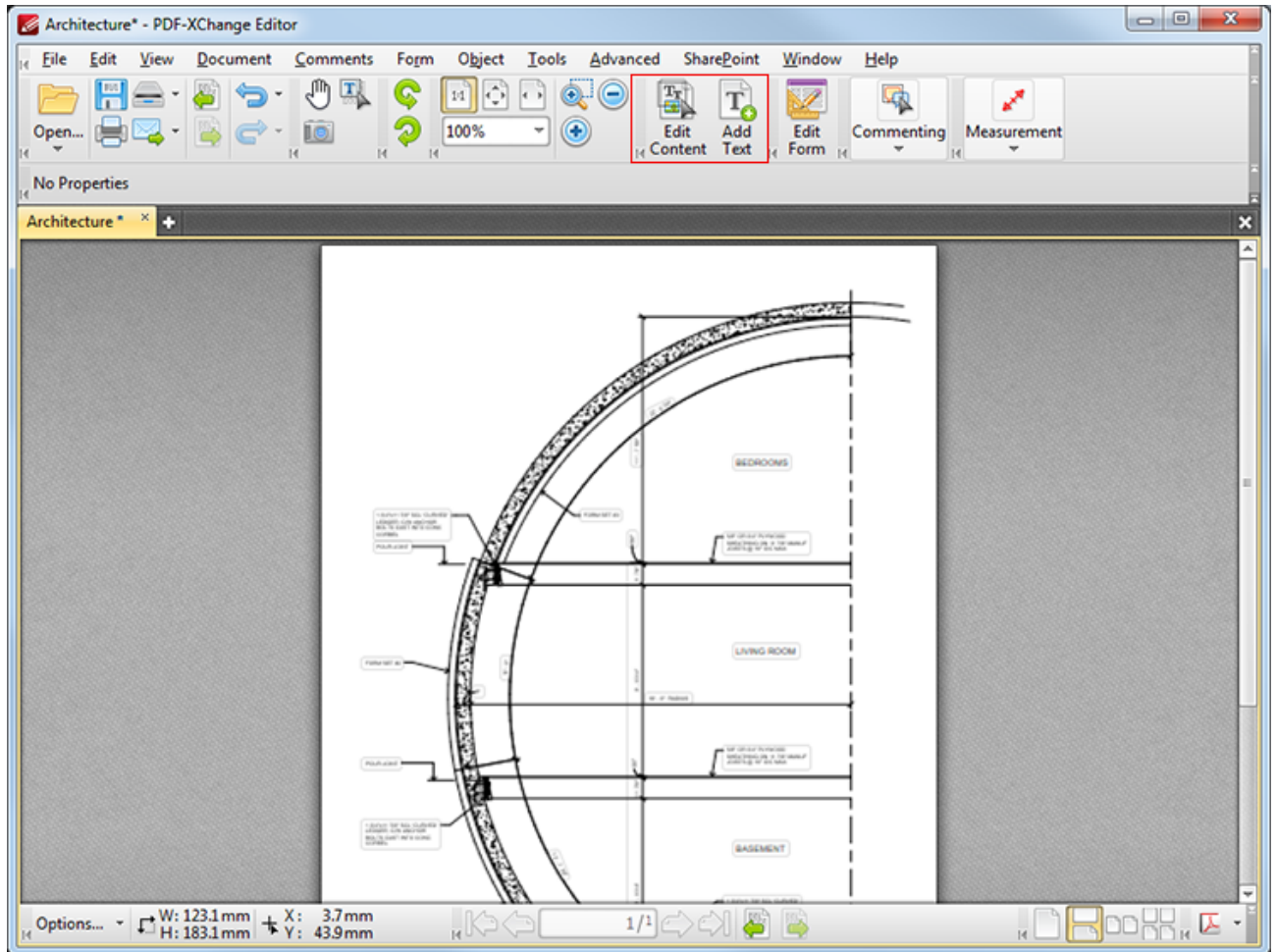
Figure 6. Content Editing Toolbar

See **here** 316 for further information.

The **File Toolbar** contains options for navigating, creating, opening and saving documents:

Figure 7. File Toolbar

See **here** 308 for further information.

The **Form Toolbar** contains options for adding/editing forms:
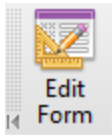
Figure 8. Form Toolbar

See **here** 320 for further information.

The **Measurement Toolbar** contains options for measuring specific elements of the active document:
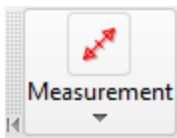
Figure 9. Measurement Toolbar

See **here** 473 for further information.

The **Menu Toolbar** contains the main menu headings and provides links to their respective menu options:
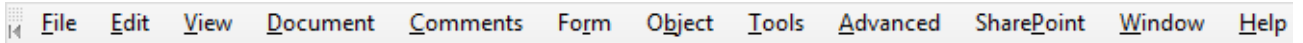
Figure 10. Menu Toolbar

See **here** 306 for further information.

The **Properties Toolbar** is located beneath the **Shortcut Toolbar.** The appearance and options of the **Properties Toolbar** depend on the type of object selected. A sample **Properties Toolbar** is displayed below:
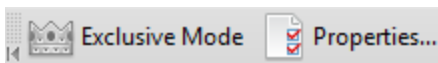
Figure 11. Properties Toolbar

See **here** 484 for further information.

The **Rotate View Toolbar** contains options for rotating the active document:

Figure 12. Rotate View Toolbar

See **here** 314 for further information.

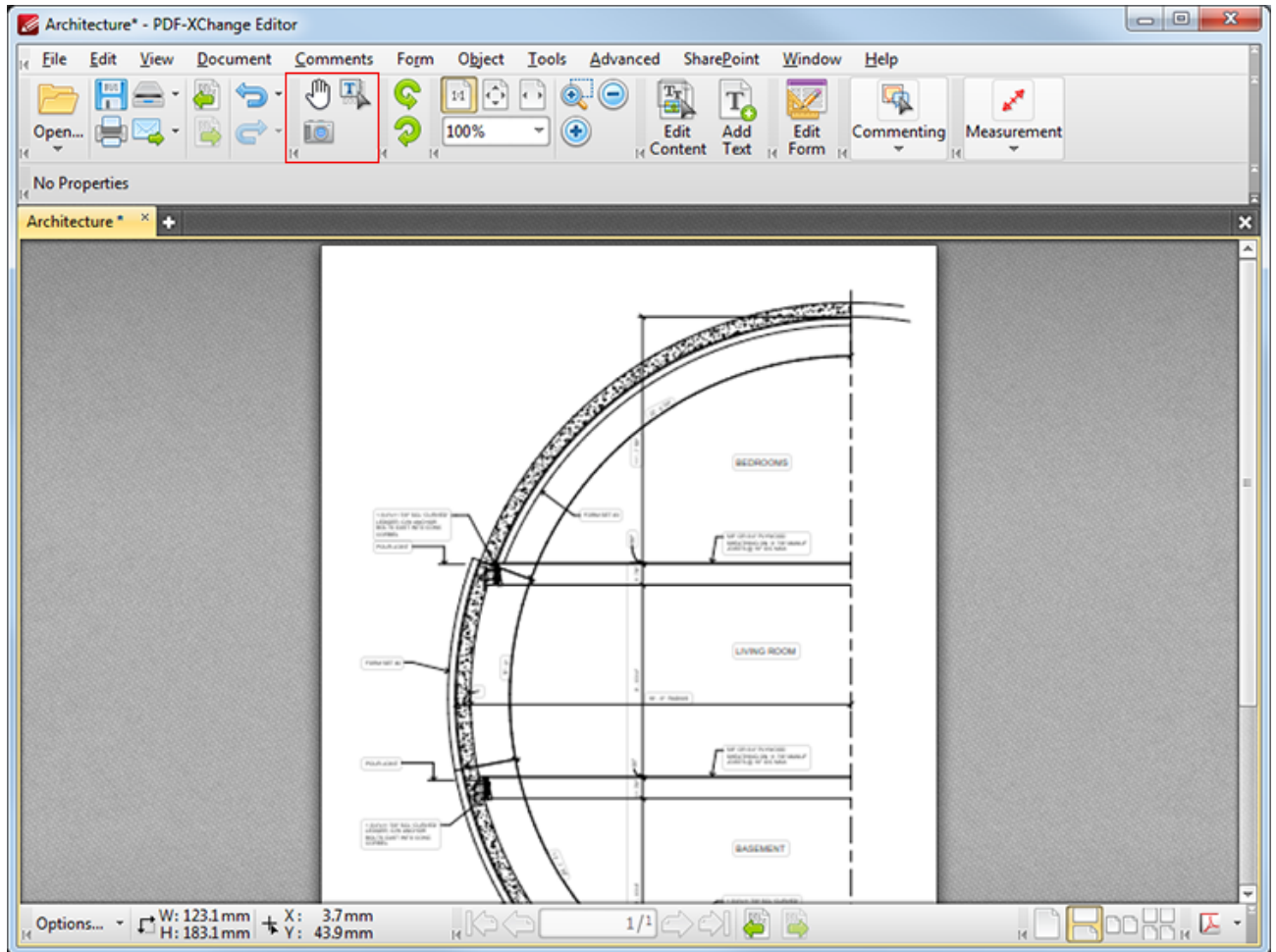The **Standard Toolbar** contains options for editing documents:

Figure 13. Standard Toolbar

See **here** 310 for further information.
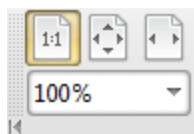
The **Zoom Toolbar** contains zoom options:

Figure 14. Zoom Toolbar

See **here** 318 for further information.

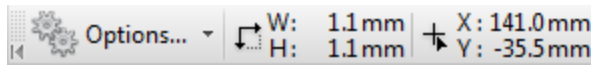The **Document Options** toolbar is located in the lower left corner of the main window and appears as below:

Figure 15. Document Options Toolbar

See **here** 475 for further information.

The **Page Layout Toolbar** is located in the lower right corner of the main window and appears as below:

Figure 16. Page Layout Toolbar

See **here** 480 for further information.

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

Figure 17. Launch Application Toolbar

See **here** 482 for further information.

The **Page Navigation Toolbar** is located in the center of the lower section of the main window and appears as below:
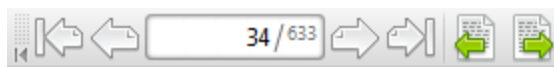

Figure 18. Page Navigation Toolbar

See **here** 478 for further information.

There are three further options in the **Toolbars** submenu:

- Click **Lock all Toolbars** to lock/unlock all toolbars and menus for customization.
- Click **Lock All Tool-panes** to lock/unlock all tool-panes for toggling and resizing.
- Click **Customize Toolbars** to enable customizable options that relate to toolbars. These options are explained **here.** 486

6.3.1.1 Menu Toolbar

Menu Toolbar

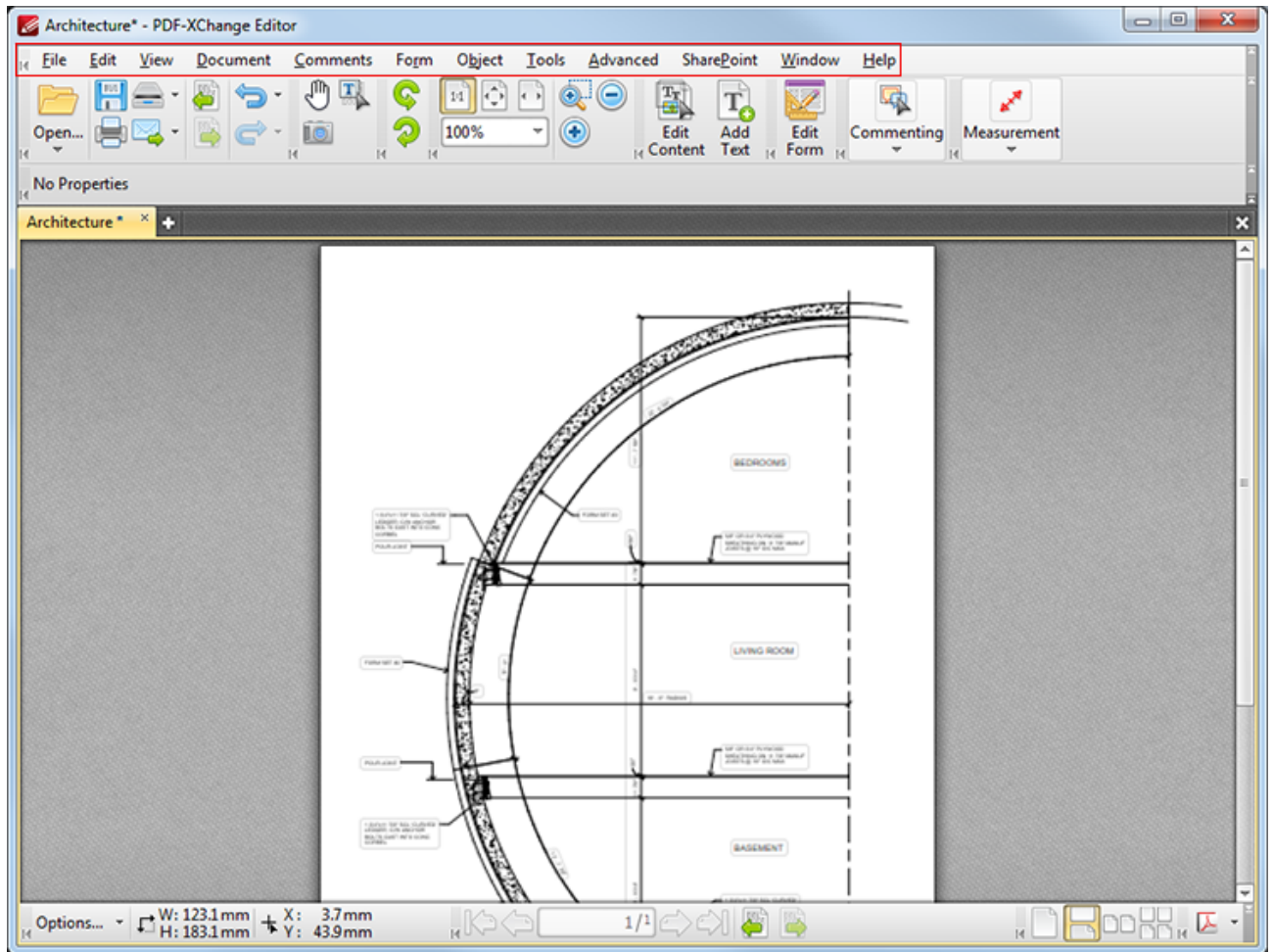The **Menu Toolbar** is located at the top of the main window:

Figure 1. Menu Toolbar

- The **File** tab contains file-level operations such as file select/save, document properties editing and print options. See **here** 150 for further details.
- The **Edit** tab contains editing functions for documents and their preferences. See **here** 215 for further details.

- The **View** tab determines the viewing settings of the application. See **here** ⌐297⌐ for further details.
- The **Document** tab contains features for editing documents. See **here** ⌐534⌐ for further details.
- The **Comments** tab contains editing options for comments. See **here** ⌐611⌐ for further details.
- The **Form** tab contains options for managing and editing form data. See **here** ⌐627⌐ for further details.
- The **Object** tab contains options for editing selected objects. See **here** ⌐629⌐ for further details.
- The **Tools** tab contains the **PDF-XChange Editor** tools for the manipulation and editing of documents. See **here** ⌐632⌐ for further details.
- The **Advanced** tab contains options that relate to document bookmarks. See **here** ⌐757⌐ for further details.
- The **Sharepoint** tab allows users to check in/out of documents located on the **Sharepoint** server. See **here** ⌐786⌐ for further details.
- The **Window** tab contains layout options for the panes and windows of open documents. See **here** ⌐788⌐ for further details.
- The **Help** tab contains help options for users in need of assistance, as well as options for updating license keys and bug reporting. See **here** ⌐790⌐ for further details.

When the Alt key is pressed each tab features an underlined letter. Press the letter on the keyboard to open the associated menu.

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 an icon with four arrows. Click and hold the **Menu Toolbar** to reposition it. It is also possible to customize the **Menu Toolbar**. See **here** ⌐486⌐ for further details.
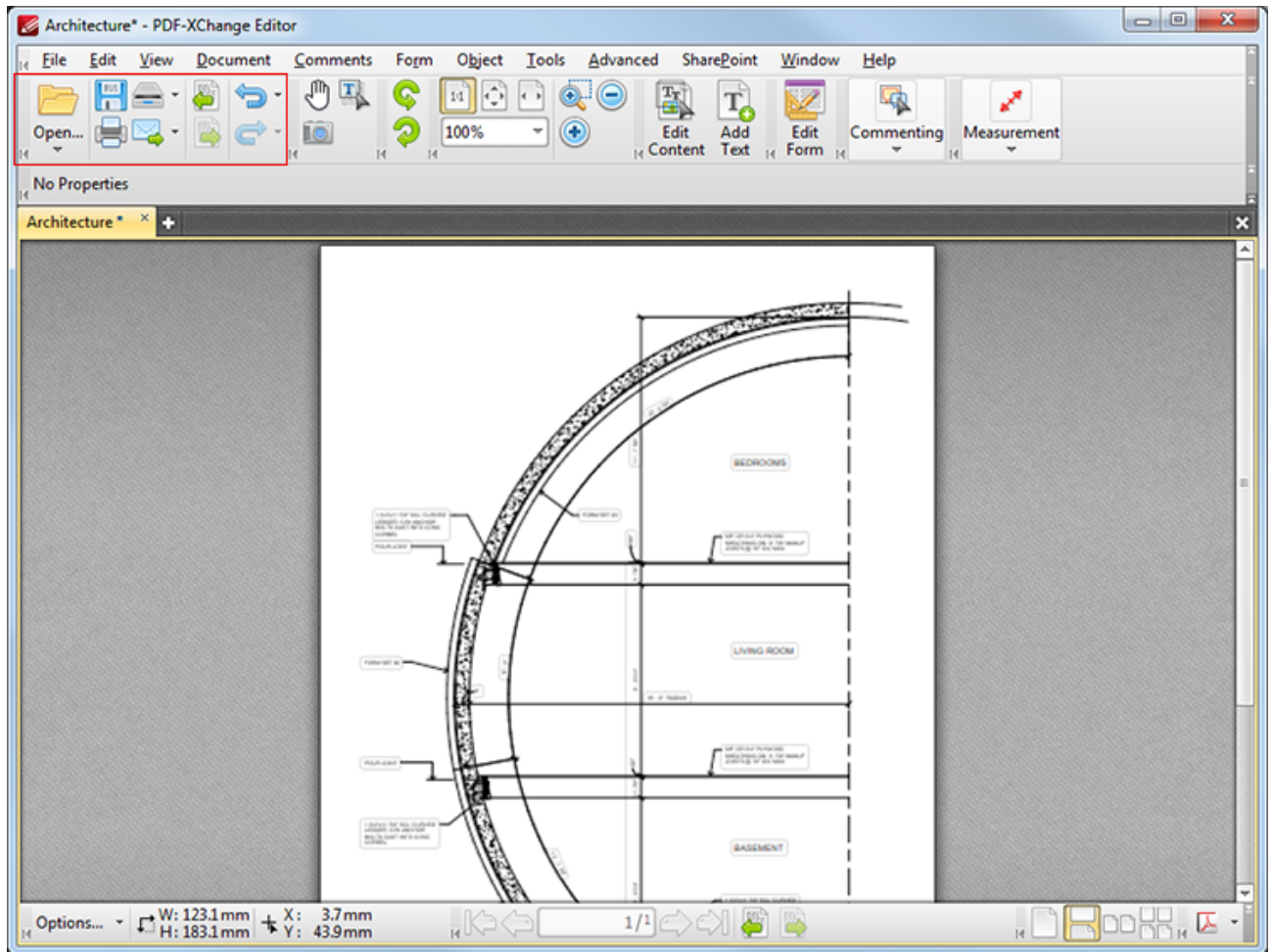
6.3.1.2 File Toolbar

File Toolbar

The **File Toolbar** contains options for navigating, creating, opening and saving documents:

Figure 1. File Toolbar

Open is used to open files from the local computer. Click the arrow to view recent documents.

Save is used to save any changes that have been made since the last save.

Print is used to print documents. See **here** 198 for further information.

Scan is used to scan documents. See **here** 186 for further information. Click the arrow adjacent to the icon to access scan shortcuts.

Email is used to email documents directly from **PDF-XChange Editor.** See **here** 190 for further information.

Previous View (or Ctrl+left arrow key) moves to the previous document location.

Next view (or Ctrl+right arrow key) moves to the next document location. This action becomes available when the **Previous View** action has been used.

Undo reverses the most recent editing action. Click the arrow adjacent to the icon to view/select the most recent actions.

Redo reverses the most recent undo. Click the arrow adjacent to the icon to view/select the most recent actions.

6.3.1.3 Standard Toolbar

Standard Toolbar

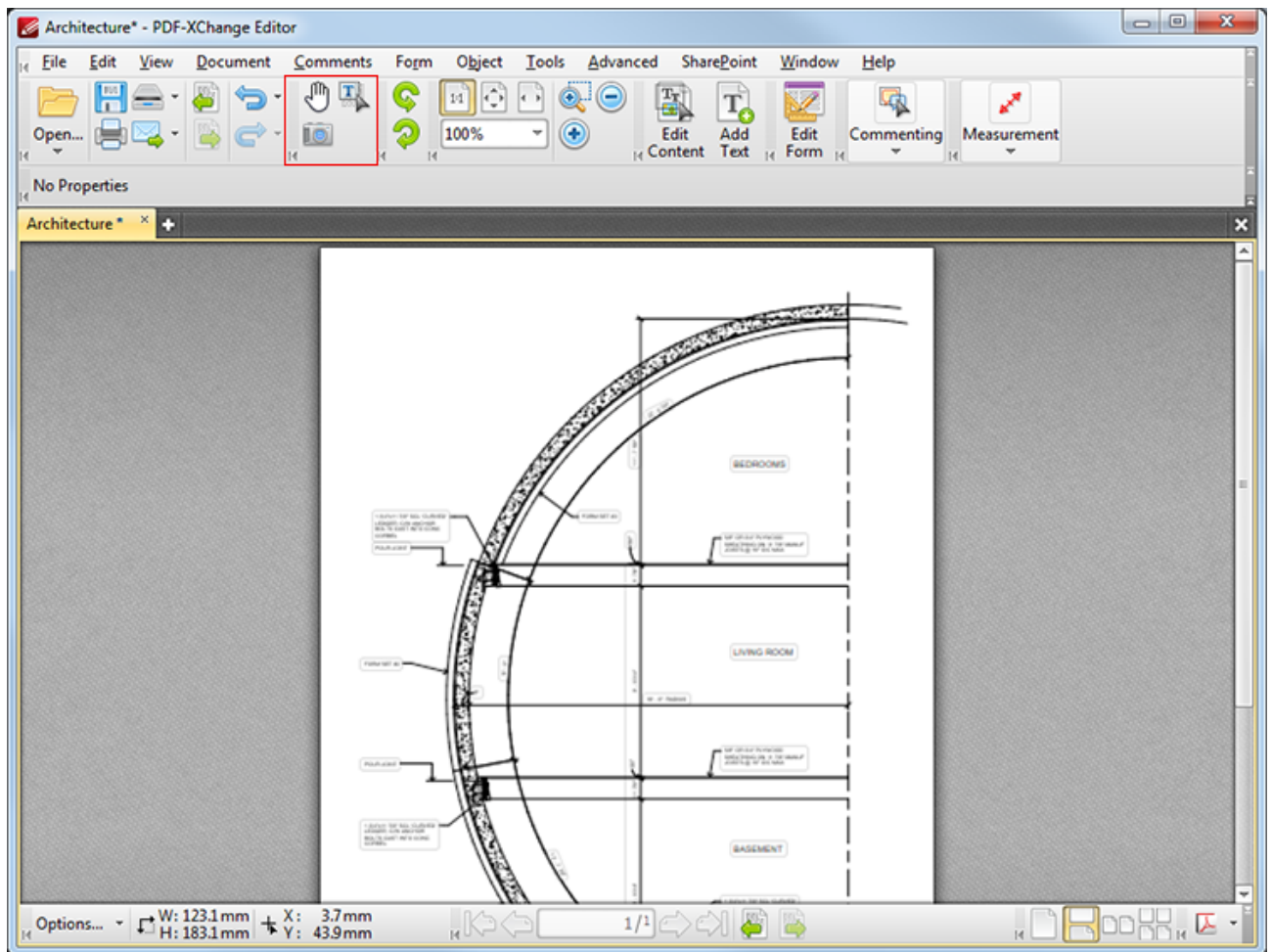The **Standard Toolbar** contains options for viewing/editing documents:

Figure 1. Standard Toolbar

The **Hand Tool** is used to scroll through document pages. See **here** 636 for further information.

The **Snapshot Tool** is used to take snapshots of the active document. When it is enabled, click a page to take a screenshot. Alternatively, click and drag the pointer to select a custom rectangular area of the document. Release the button to take the snapshot. When a snapshot is taken, a bitmap copy of the selection is pasted to the clipboard. See **here** 638 for further information. See **here** 271 for settings regarding the **Snapshot Tool.**

The **Select Text Tool** is used to select text for editing purposes. When this tool is enabled, click and drag across text to select it. Then right-click the selection for editing options. The menu detailed in *(figure 2)* will be displayed:
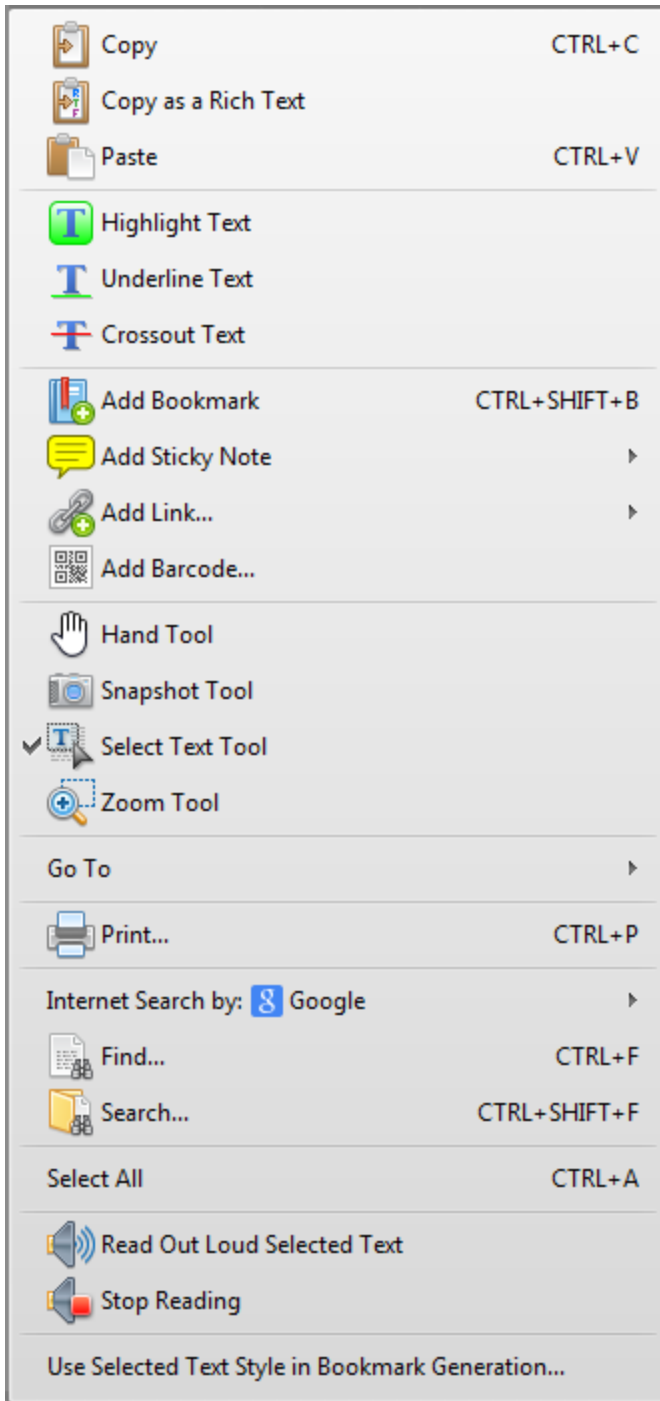
Figure 2. Select Text Tool, Right-Click Options

The following options in *(figure 2)* relate to editing selected text:

- Click **Copy** to copy the selected text.
- Click **Copy as a Rich Text** to copy the selected text into Rich Text Format.
- Click **Highlight Text** to highlight the selected text.
- Click **Underline Text** to underline the selected text.

- Click **Crossout Text** to add a strikethrough to the selected text.
- Click **Add Bookmark** to create a bookmark from the selected text. See **here** 493 for further information.
- Click **Internet Search by** to perform an internet search for the selected text. Google is the search engine selected in *(figure 1)*. Hover the pointer over the **Internet Search by** option to select an alternative search engine.
- Click **Read Out Loud Selected Text** to activate the **Read Out Loud Feature** 861 for the selected text.
- Click **Stop Reading** to halt the Read Out Loud Feature during operation.
- Click **Use Selected Text Style in Bookmark Generation** to launch the **Bookmark Generation Properties** dialog box. This makes it possible to create a bookmark using the content and style of selected text. See **here** 762 for further details.
- See **here** 807 for an explanation of the other options detailed in *(figure 2)*.

Please note that if it is intended to copy text from PDF documents and paste it in applications/locations outside of **PDF-XChange Editor** (such as **Microsoft Word**) then additional page breaks may appear at the end of every line of text. This is a recognized problem with PDF documents. The **Edit Content Tool** 653 should be used instead of the **Select Text Tool** in order to avoid this issue. When the **Edit Content Tool** is enabled, select the text to be copied and then press Ctrl+C to copy it.
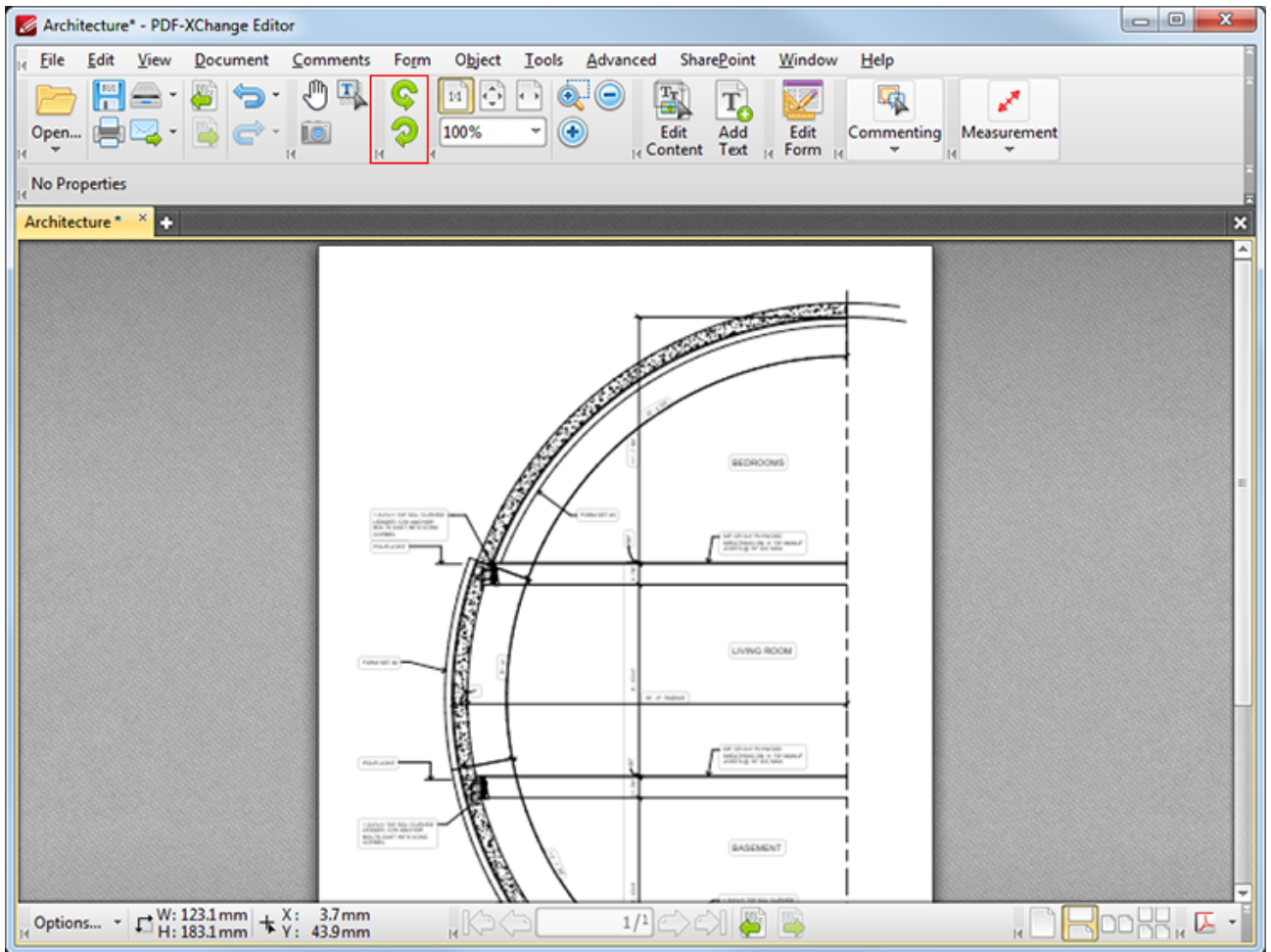
6.3.1.4   Rotate View Toolbar

Rotate View Toolbar

The **Rotate View Toolbar** contains options for rotating documents:

Figure 1. Rotate View Toolbar

Please note that rotations are intended for viewing/editing purposes only and will not be saved as part of a file. (The settings in the **Thumbnails pane** 497 can be used to rotate pages permanently). There are two rotation options in the **Rotate View Toolbar:**

Rotate Counterclockwise rotates the active document counterclockwise. Documents will be rotated ninety degrees each time the icon is clicked.

Rotate Clockwise rotates the active document clockwise. Documents will be rotated ninety degrees each time the icon is clicked.
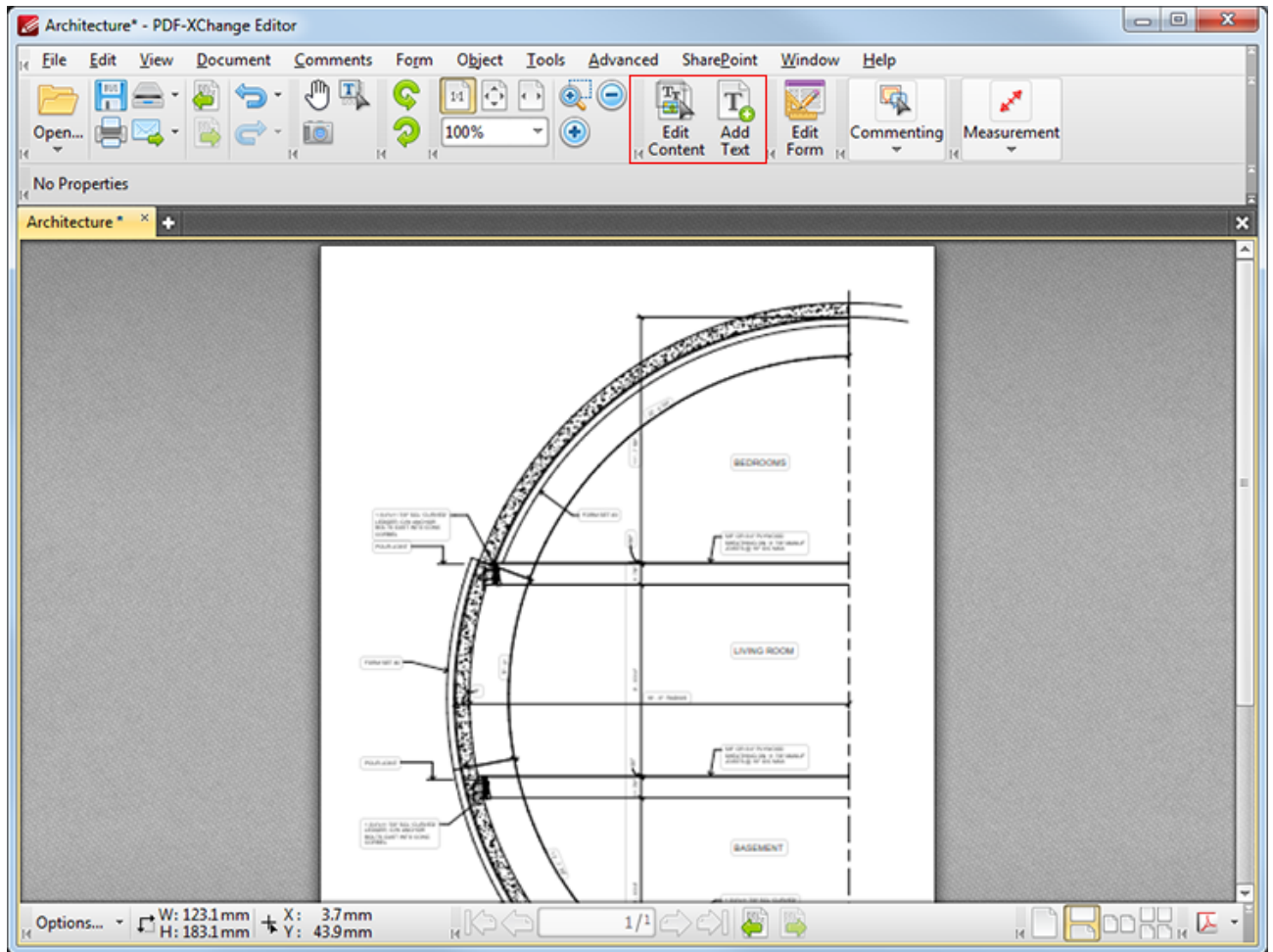
6.3.1.5   **Content Editing Toolbar**

Content Editing Toolbar

The **Content Editing Toolbar** contains options for editing document content:

Figure 1. Content Editing Toolbar

The **Edit Content Tool** is used to edit exiting content. When it is selected, the active document is divided into editable sections based on the images and text it contains. These sections can then be resized, repositioned and edited as detailed **here.**

The **Add Text** tool is used to add text to existing content. When it is selected the pointer is replaced with a cross icon. Click and drag the icon to create the space into which the new text is to be entered. When the mouse button is released it becomes possible to enter text into the designated space. When this tool is enabled customizable options are available in the **Properties Toolbar.** 484 See **here** 484 for an explanation of these options.

Further details about editing pages are available **here.** 807

6.3.1.6   Zoom Toolbar

Zoom Toolbar

The **Zoom Toolbar** contains document magnification options:
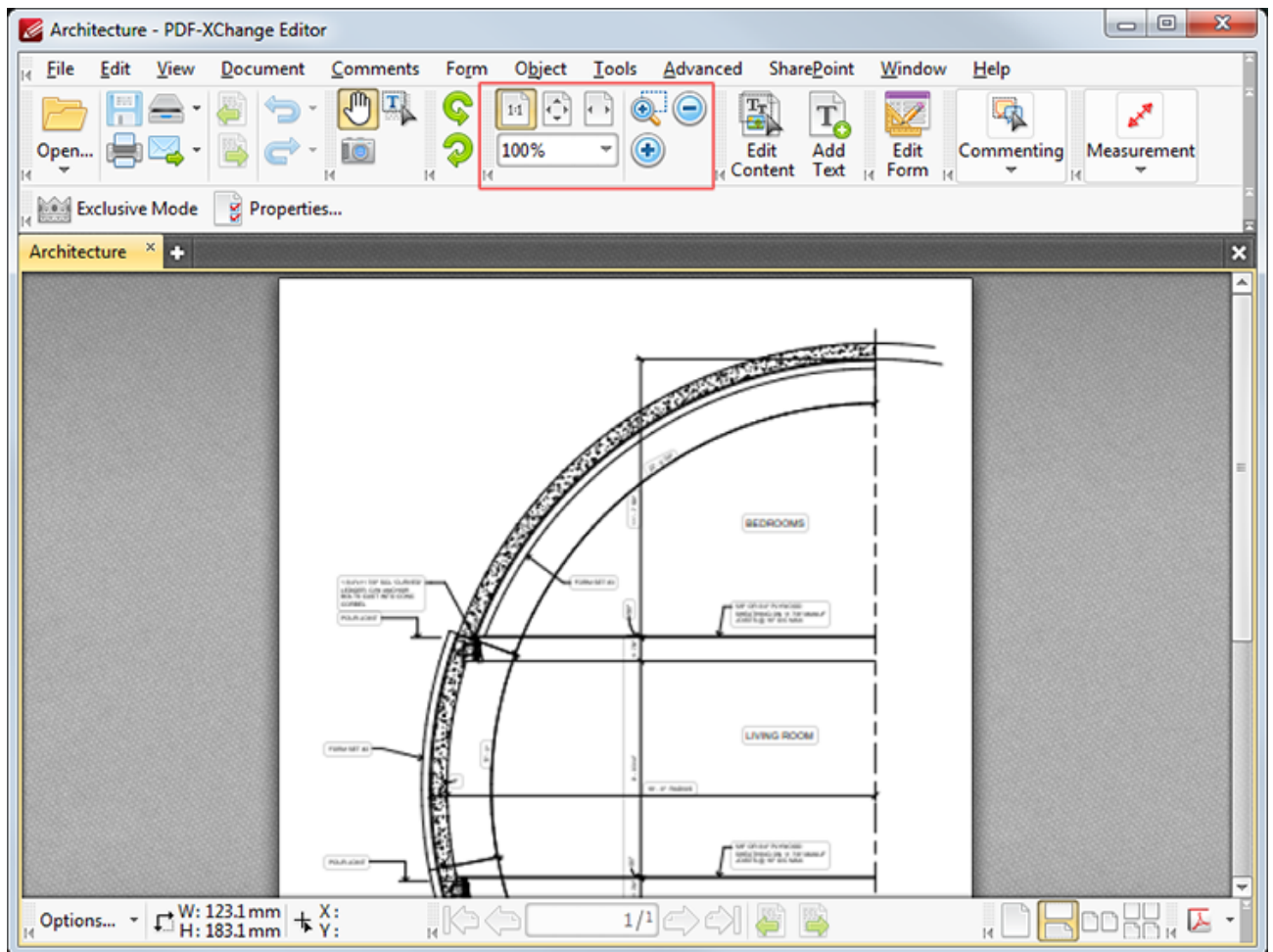

Figure 1. Zoom Toolbar

The **Actual Size** button sets the zoom level to the actual document size within the viewing pane. (This may result in the page exceeding the limits of viewable space. If this happens then the scroll bars can be used to view the entire document).

The **Fit Page** button sets the borders of documents to match those of the viewing pane.

The **Fit Width** button fits files to match the width of the viewing pane.
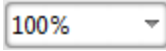
The **Zoom Dropbox** is used to select standard zoom settings. Click the dropdown arrow to view available options. Alternatively, enter a custom figure in the number box.

The **Zoom Tool** increases 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 in the active document. Alternatively, click and drag to determine a rectangle and then release the mouse button to zoom to the area determined.

The **Zoom In** button increases the zoom. It focuses automatically on the center point of documents.

The **Zoom Out** button decreases the zoom. It focuses automatically on the center point of documents.

6.3.1.7   Form Toolbar

Form Toolbar

The **Form Toolbar** enables options for adding and editing form fields to documents. Click **Edit Form** to enable the **Form Toolbar** options:
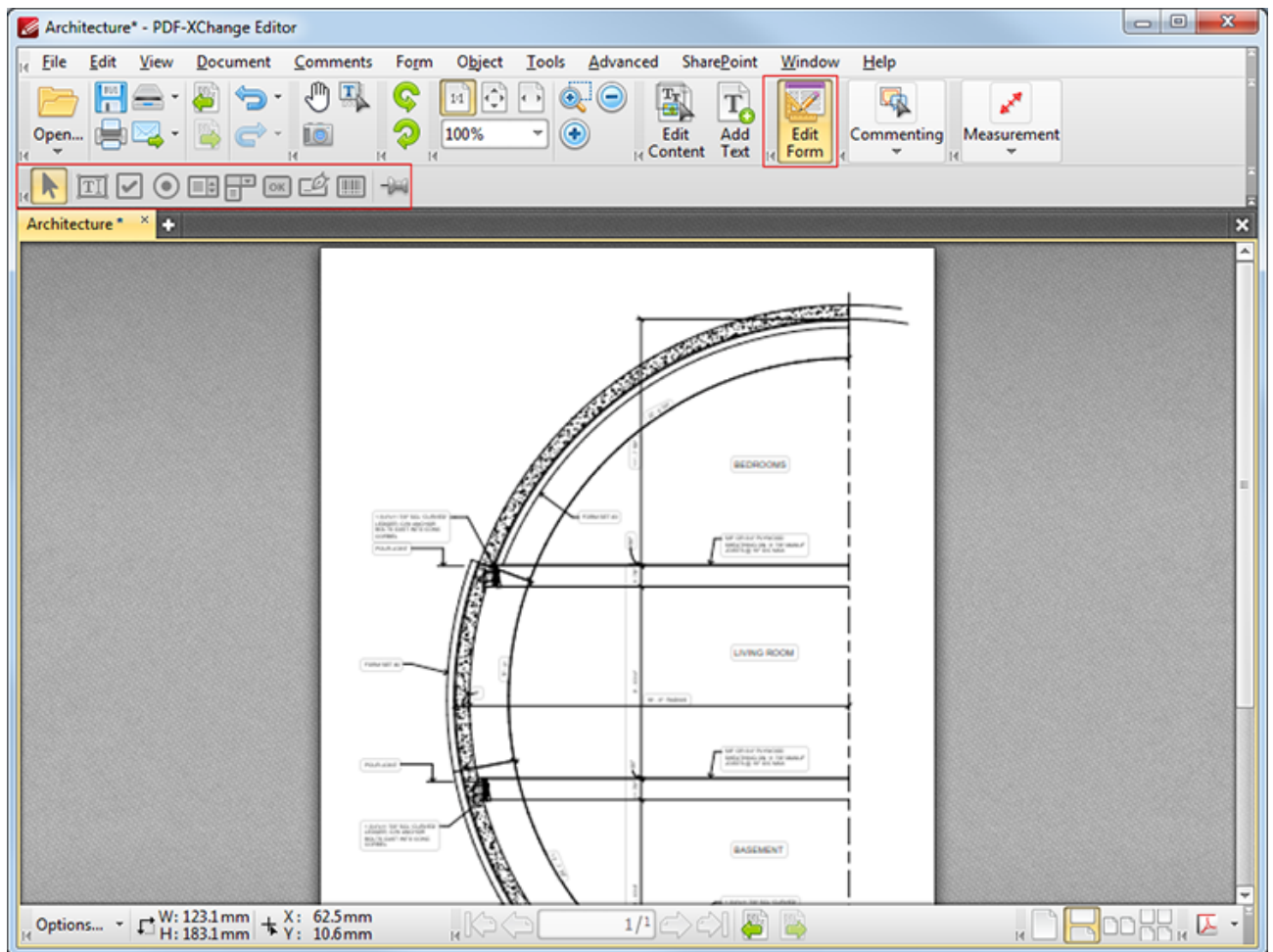

Figure 1. Form Toolbar

 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 remaining eight options enable the customizable form fields that **PDF-XChange Editor** can be used to create:

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** 361 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** 374 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** 386 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** 420 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** 437 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** 455 for further information.

Right-Click Menu for Form Fields

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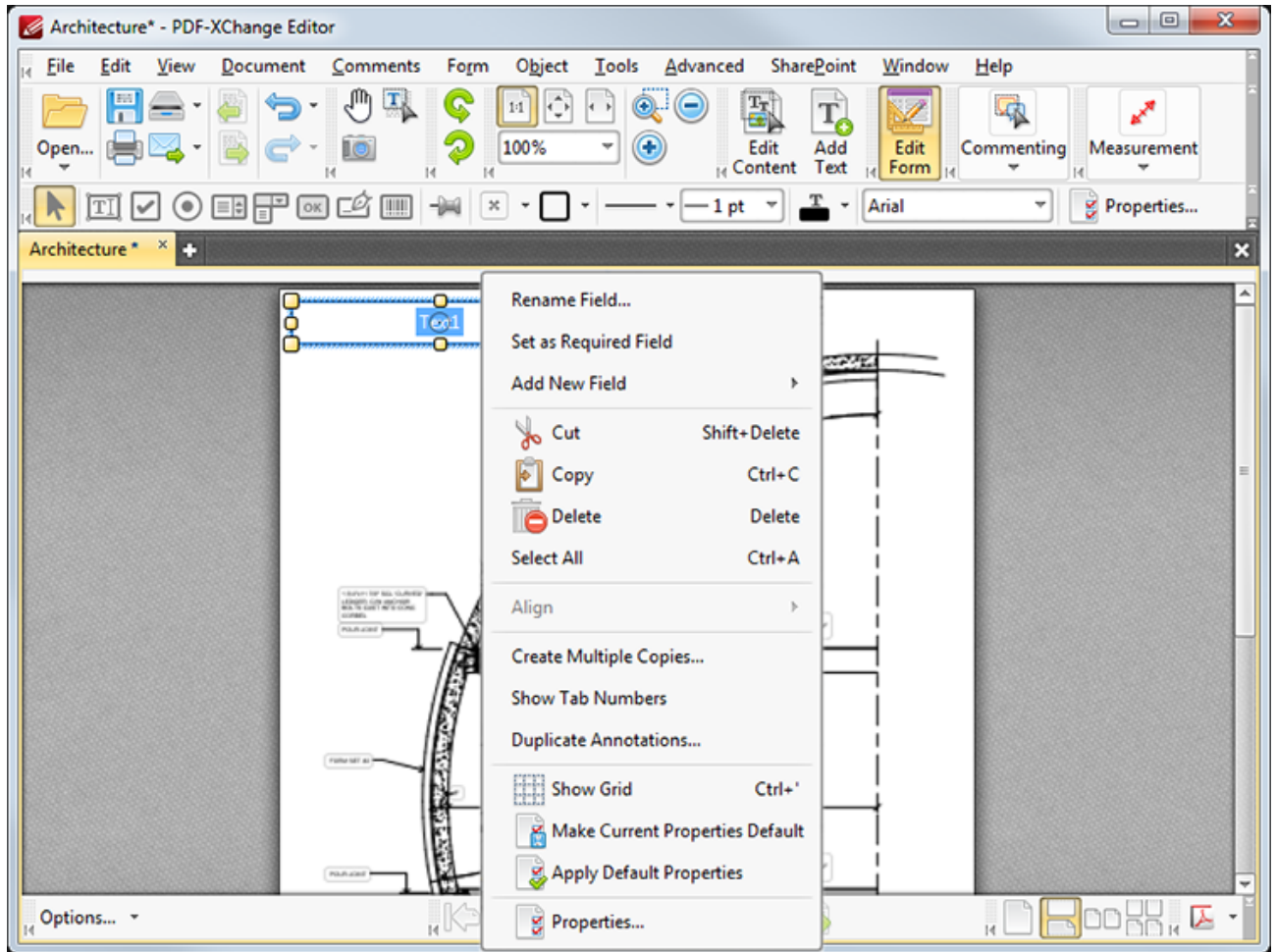
Figure 2. Right-Click Form Options

- Click **Rename Field** to rename the selected field.
- Click **Set as Required Field** to designate the selected field as required, which means it must be filled before the document can be submitted. These fields will be highlighted when the **Highlight Required Fields Only** option outlined **here** [273] is utilized.
- Click **Add New Field** to add new fields to documents. Available forms are detailed above.
- Click **Cut, Copy** or **Delete** to perform these actions on the selected form.
- Click **Select All** to select all form fields.
- Click **Align** to align multiple fields. This option is available only when multiple fields are selected. It does not affect other elements of the active document. Content will align to the item that was first placed in the document by default if the items were group-selected using the mouse. If items were group-selected by holding Ctrl and selecting them one at a time, then the first item selected will be used as the reference point.
- Click **Create Multiple Copies** to create copies of selected forms. The dialog box displayed in *(figure 3)* will be displayed.

- Click **Show Tab Numbers** to display automated tab numbers within each form field. These numbers represent the tab order when tab is being used to move through and fill the form. The tab order can be adjusted in the **Fields pane.** 519
- Click **Duplicate Annotations** to duplicate the annotations of the selected object. The dialog box displayed in *(figure 4)* will be displayed.
- Click **Show Grid** to insert a grid into the background of the active document in order to assist with the manual placement of objects.
- Click **Make Current Properties Default** to set the properties of the object currently selected as the default properties for all subsequent objects of the same format.
- Click **Apply Default Properties** to apply the default properties to the object currently selected.
- Click **Properties** to launch the **Properties** pane, which can be used to view/edit the properties of selected fields.
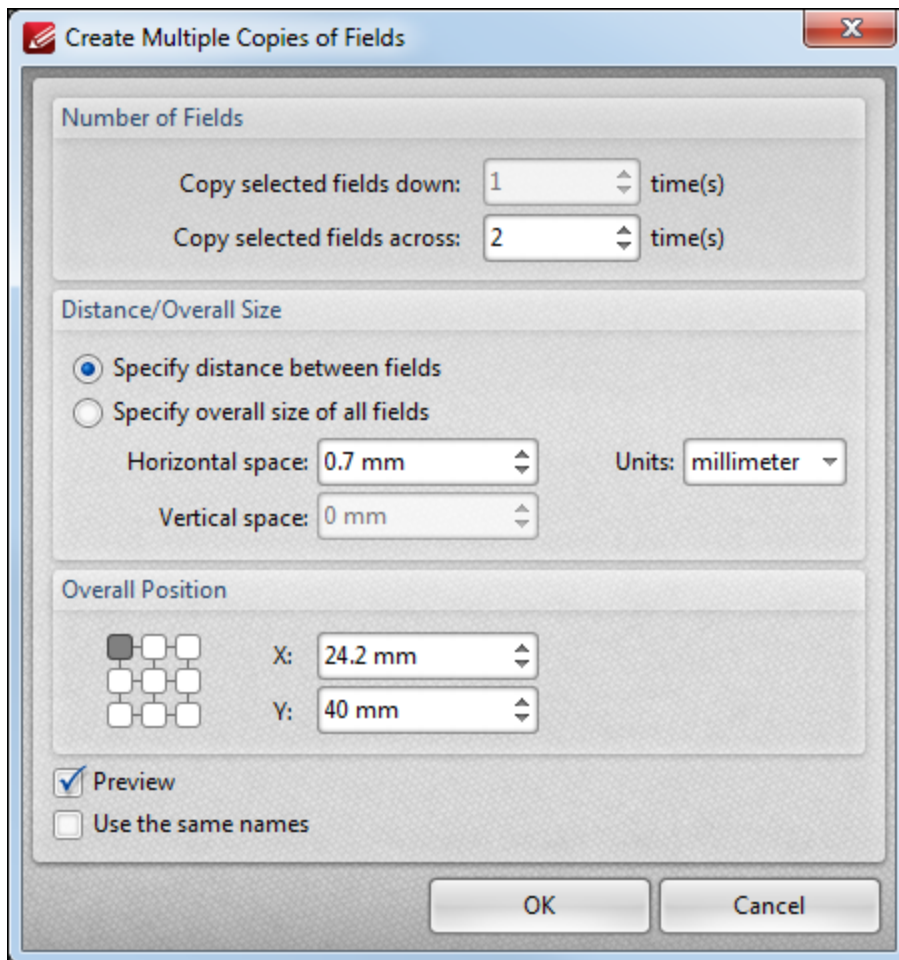

Figure 3. Create Multiple Copies of Fields Dialog Box

- The figure entered in the the **Copy selected fields down** number box determines the amount of copies placed vertically below the parent field.
- The figure entered in the the **Copy selected fields across** number box determines the amount of copies placed horizontally from the parent field.

- Select **Specify distance between fields** to determine the distance between the copies of the selected field. Enter the desired distances in the **Horizontal space** and **Vertical space** number boxes. Select a unit of measurement from the **Units** menu.
- Select **Specify overall size of all fields** to determine the size of the area in which the fields will be multiplied. The value entered in the **Overall width** and **Overall height** number boxes determines the overall width and height respectively of the area in which the selected field is multiplied. Select the desired units of measurement from the **Units** menu.
- The **Overall Position** settings can be used to determine the overall position of copied fields. Edit the **X** and **Y** values as desired. The position selected in the grid determines the starting point for measurements when creating multiple copies.
- Select the **Preview** box to place a preview on the document before creating copied fields.
- Select the **Use the same names** box as desired. This is useful for fields that require the same user data or other elements such as the current date. Copies will feature the same name as their original followed by a unique number.
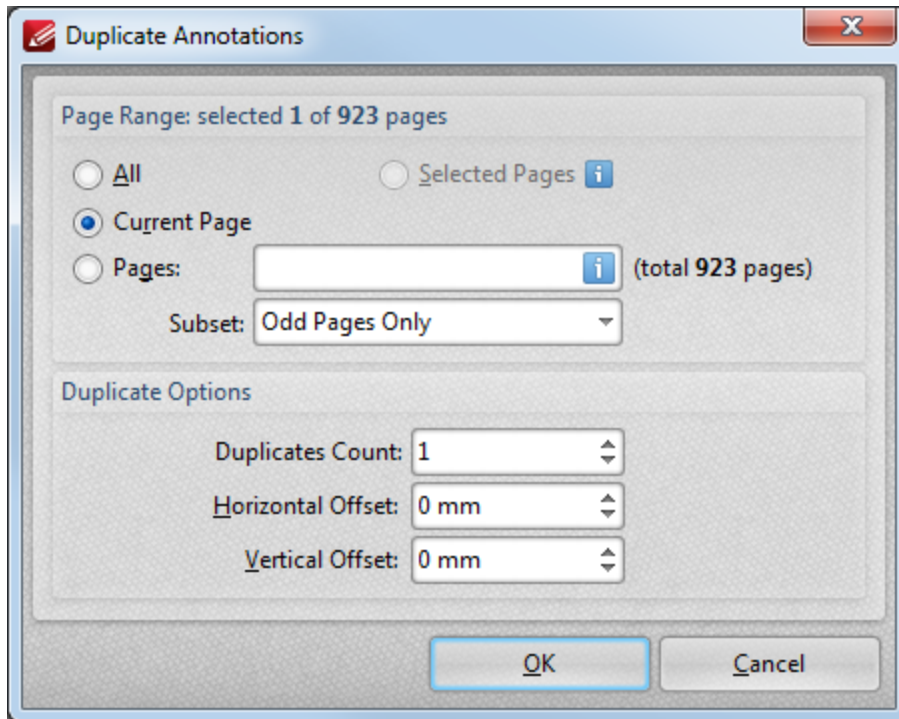
Figure 4. Duplicate Annotations Dialog Box

- Use the **Page Range** settings to determine the pages on which selected forms are duplicated:
  - Click **All** to select all document pages.
  - Click **Current Page** to duplicate the form on the active page.
  - Click **Pages** to determine a page range. See **here** 860 for page range options.

- Use the **Duplicate Options** settings to determine the duplication of selected forms:
  - The value entered in the **Duplicates Count** number box determines the amount of duplicates created.

- The value entered in the **Horizontal Offset** number box determines the horizontal offset from the original object.
- The value entered in the **Vertical Offset** number box determines the vertical offset from the original object.
- The value entered in the **Page Offset** number box determines the page offset from the original object.

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.** 306

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.

6.3.1.7.1 Add Text Fields to Documents

![PDF icon]**Add Text Fields to Documents**

Text fields are used to denote a space in which users can enter form information such as their name, password and date of birth:
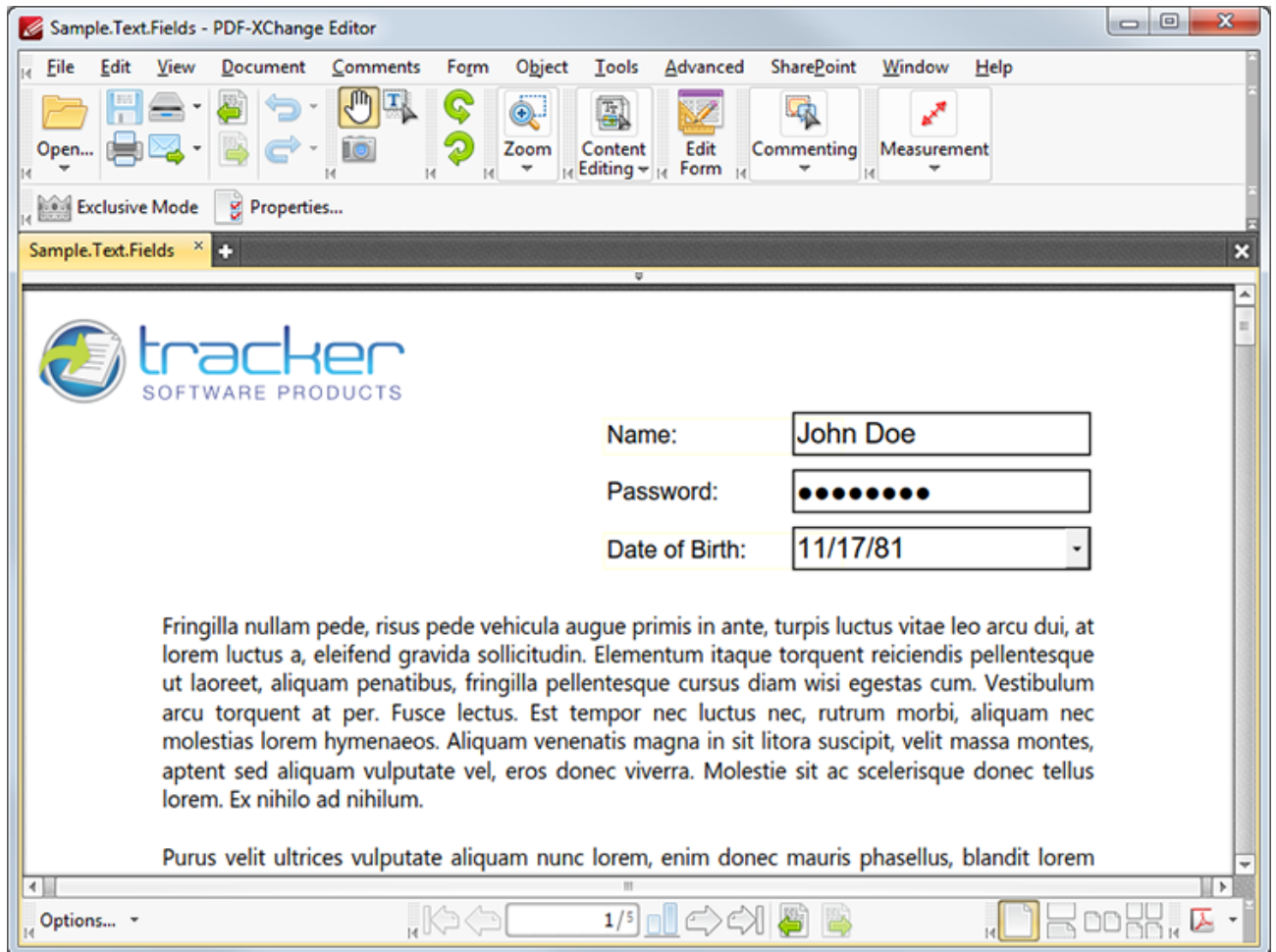
Figure 1. Example Text Fields

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:
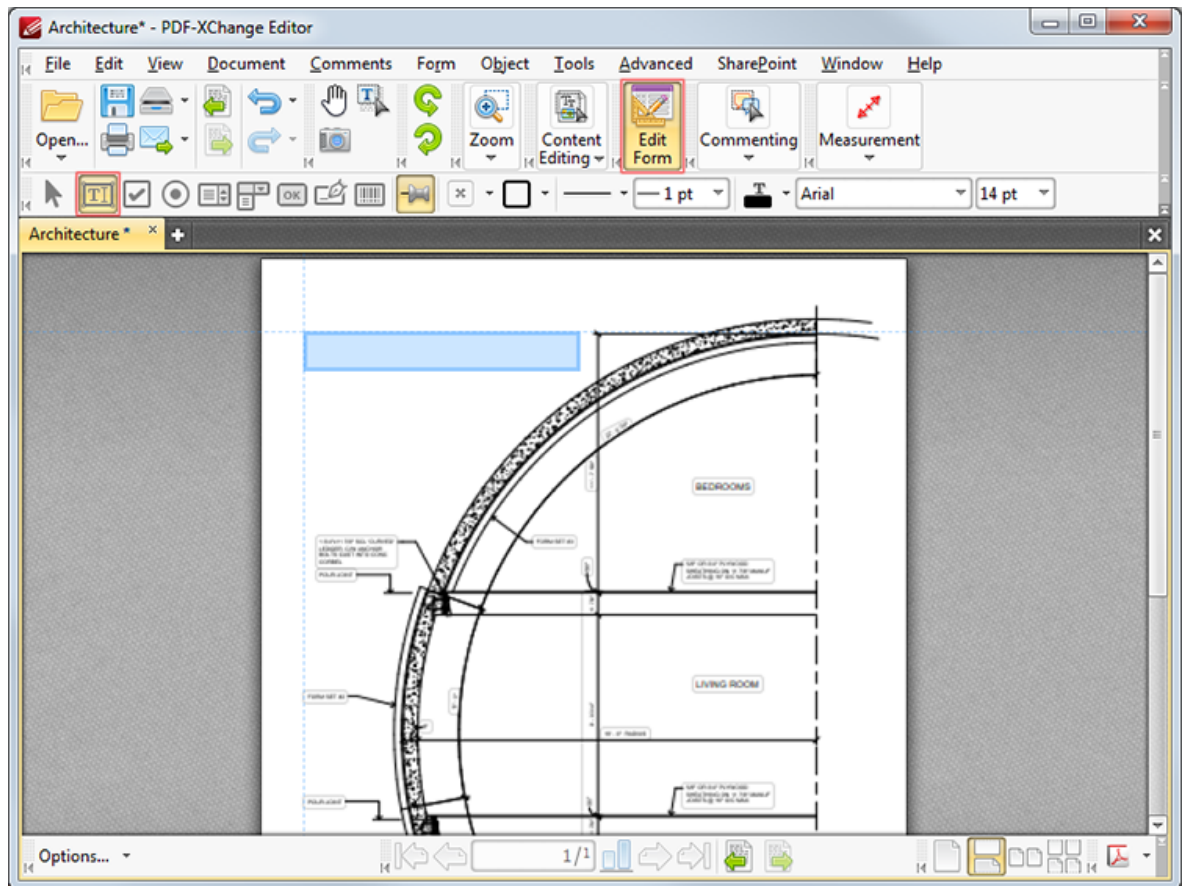
Figure 2. Active Text Field Tool

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** ₅₂₅ to assist in the precise placement of text fields). Added text fields appear as below:
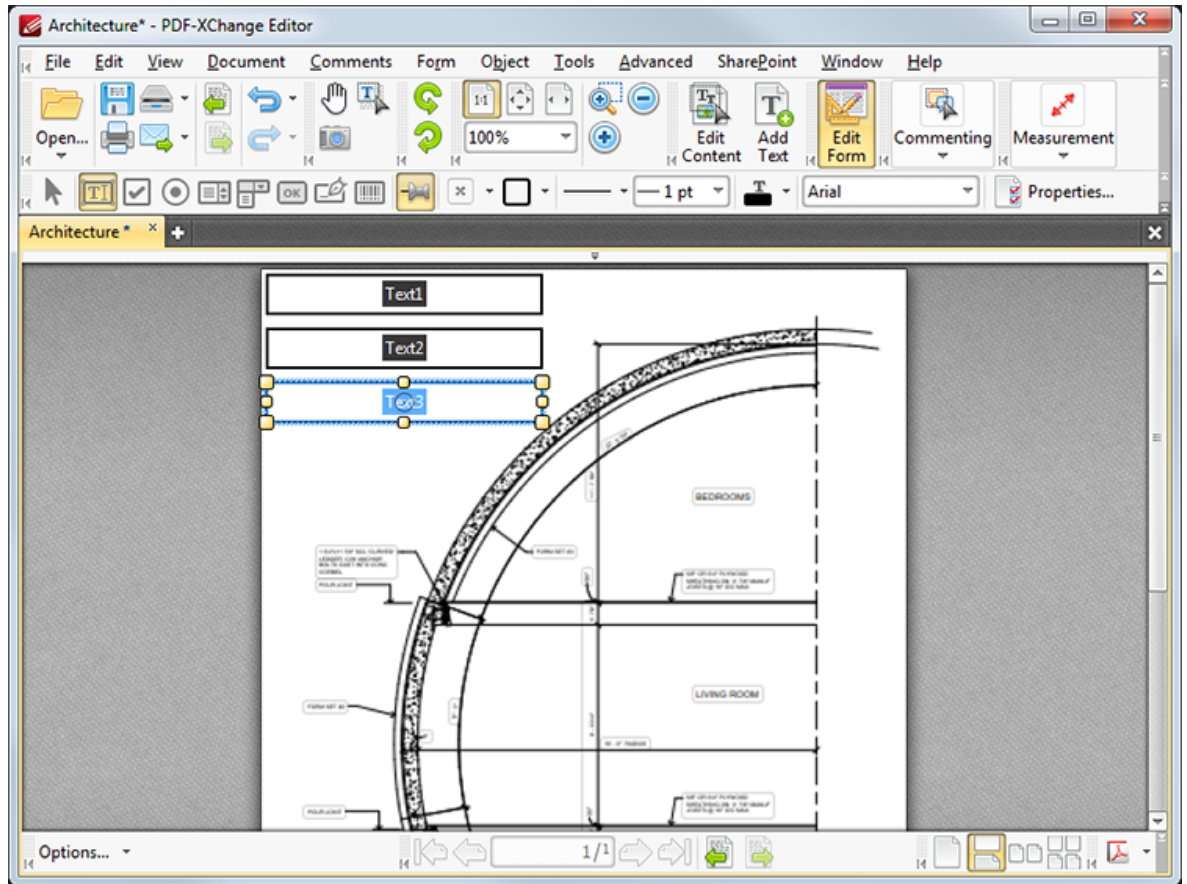
Figure 3. Added Text Fields

- Click and drag the yellow control points to resize text fields.
- Use the options in the **Properties Toolbar** ⌐484⌐ 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 **Widget Properties** pane, which enables the customization of additional elements of text fields.

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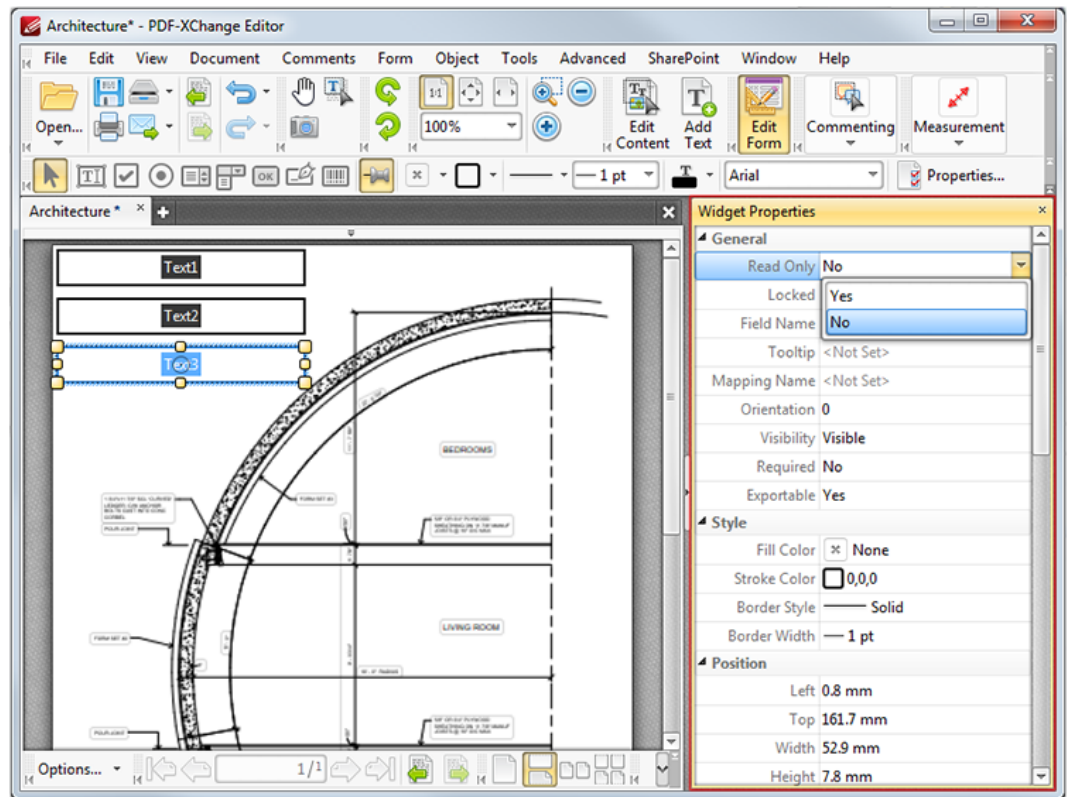
Figure 4. Text Field Tool, Widget Properties Pane

The **Widget 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 **Widget 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.** 519
- **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.

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:
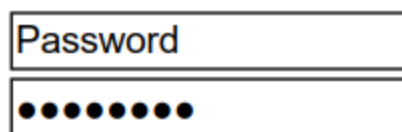
Password

●●●●●●●●

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:
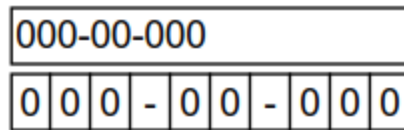
Figure 6. Standard Text Field (above) and Standard Text Field with Comb Enabled (below)

- **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:
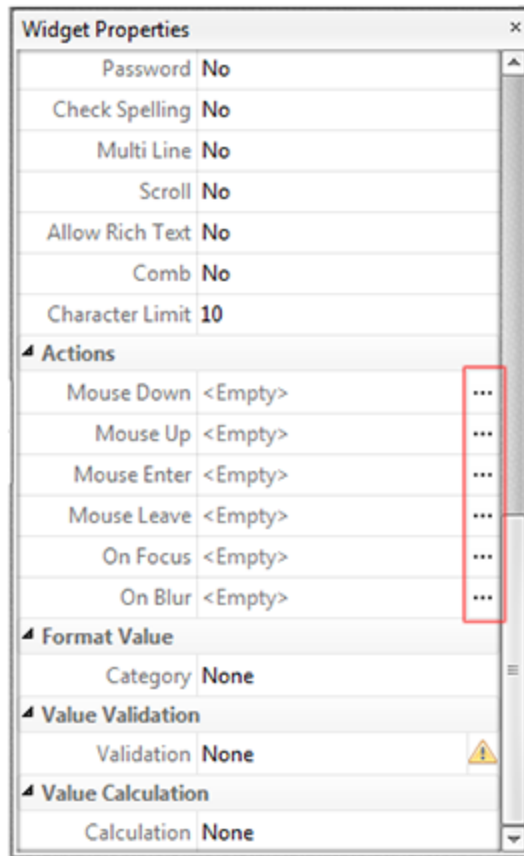
Figure 7. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 738

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:**
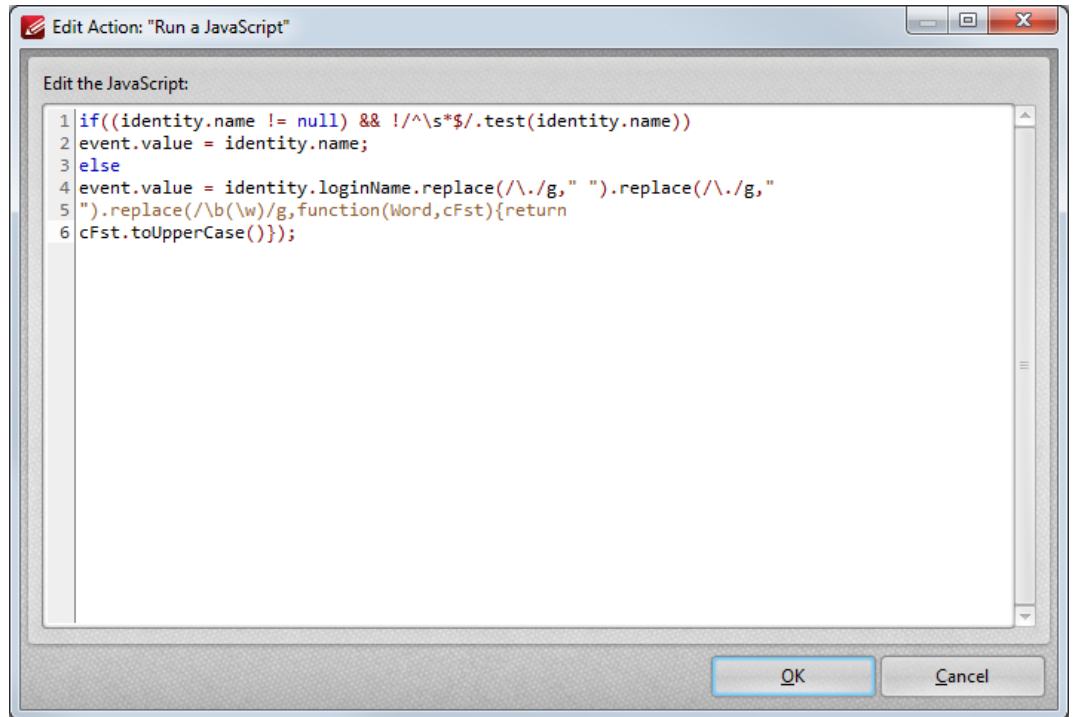
Figure 8. Edit Action: "Run a JavaScript" Dialog Box

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 the manner in which 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 the 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.
- **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':**
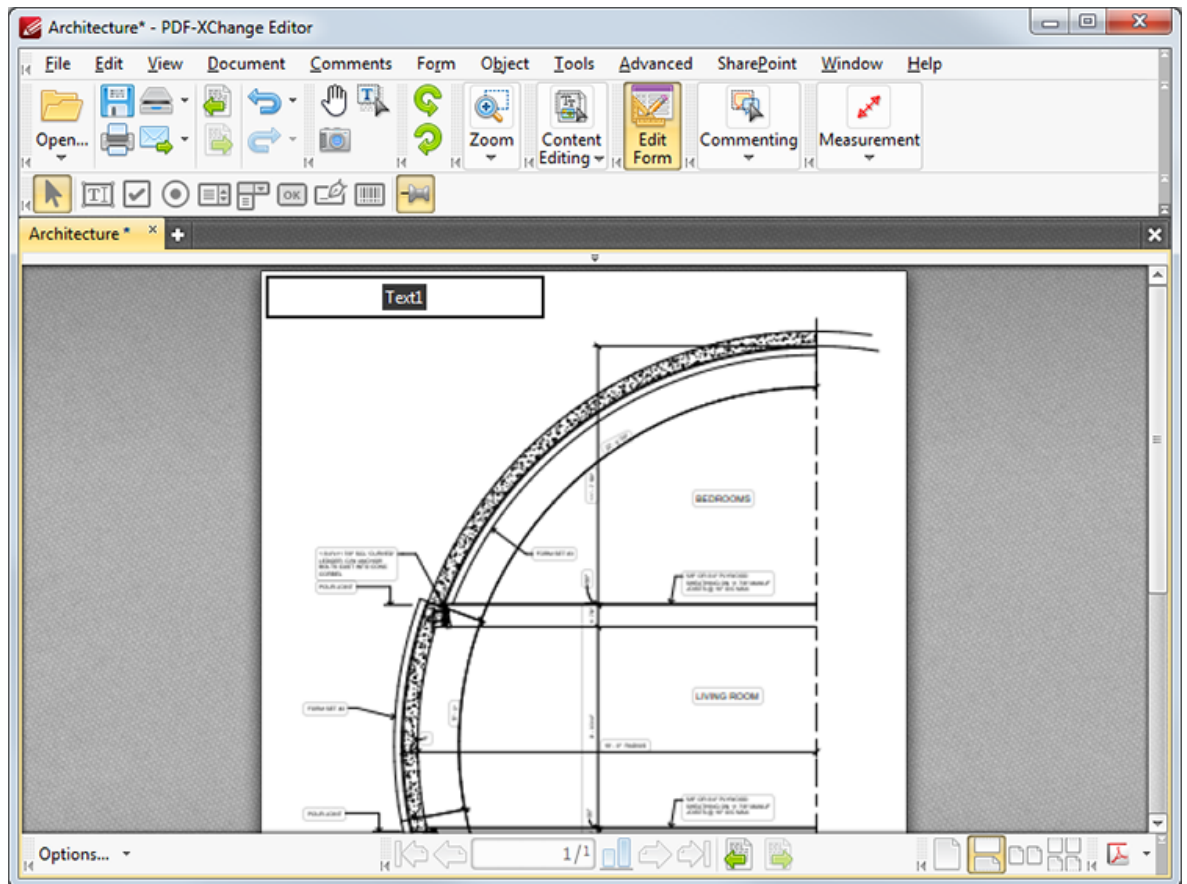
Figure 9. Value Validation Example, Text Field

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 **Widget Properties** pane will open:

Figure 10. Value Validation Example, Widget Properties Pane

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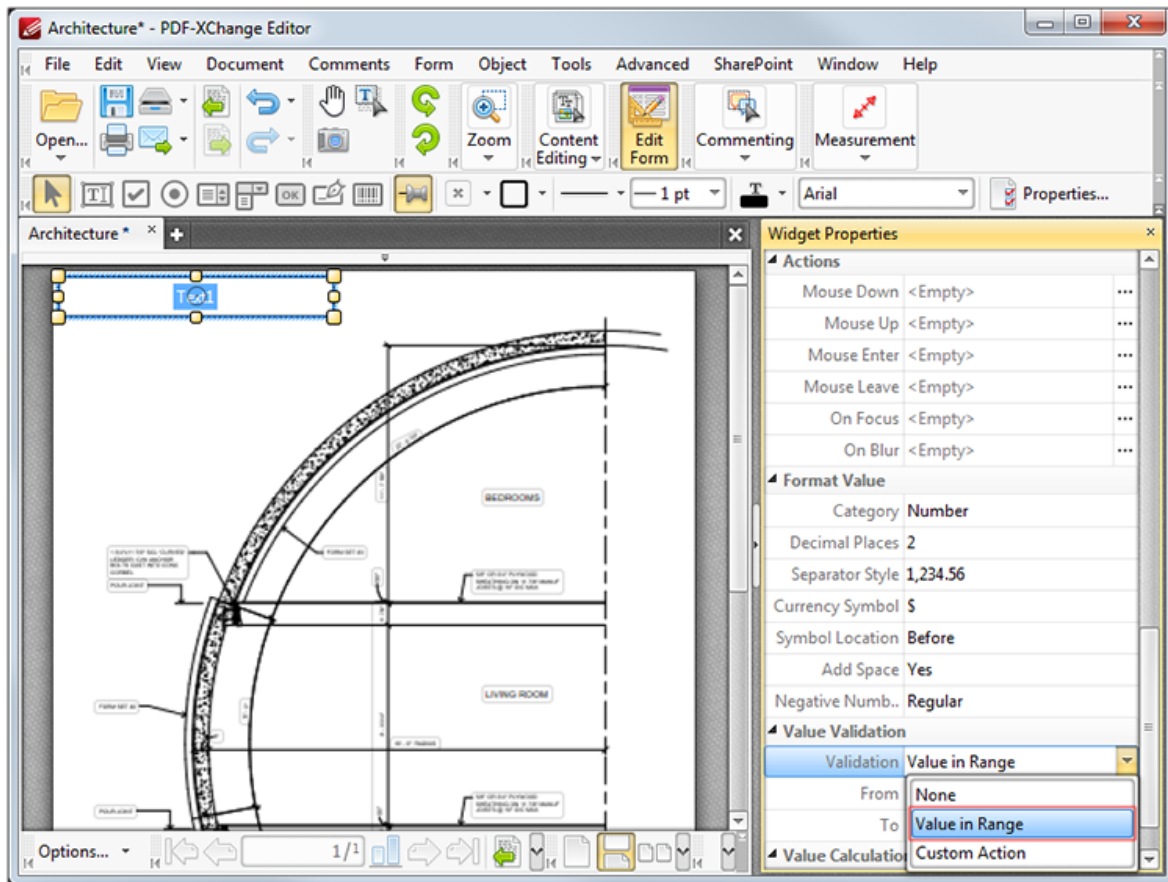
Figure 12. Value Validation Example, Validation Option

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

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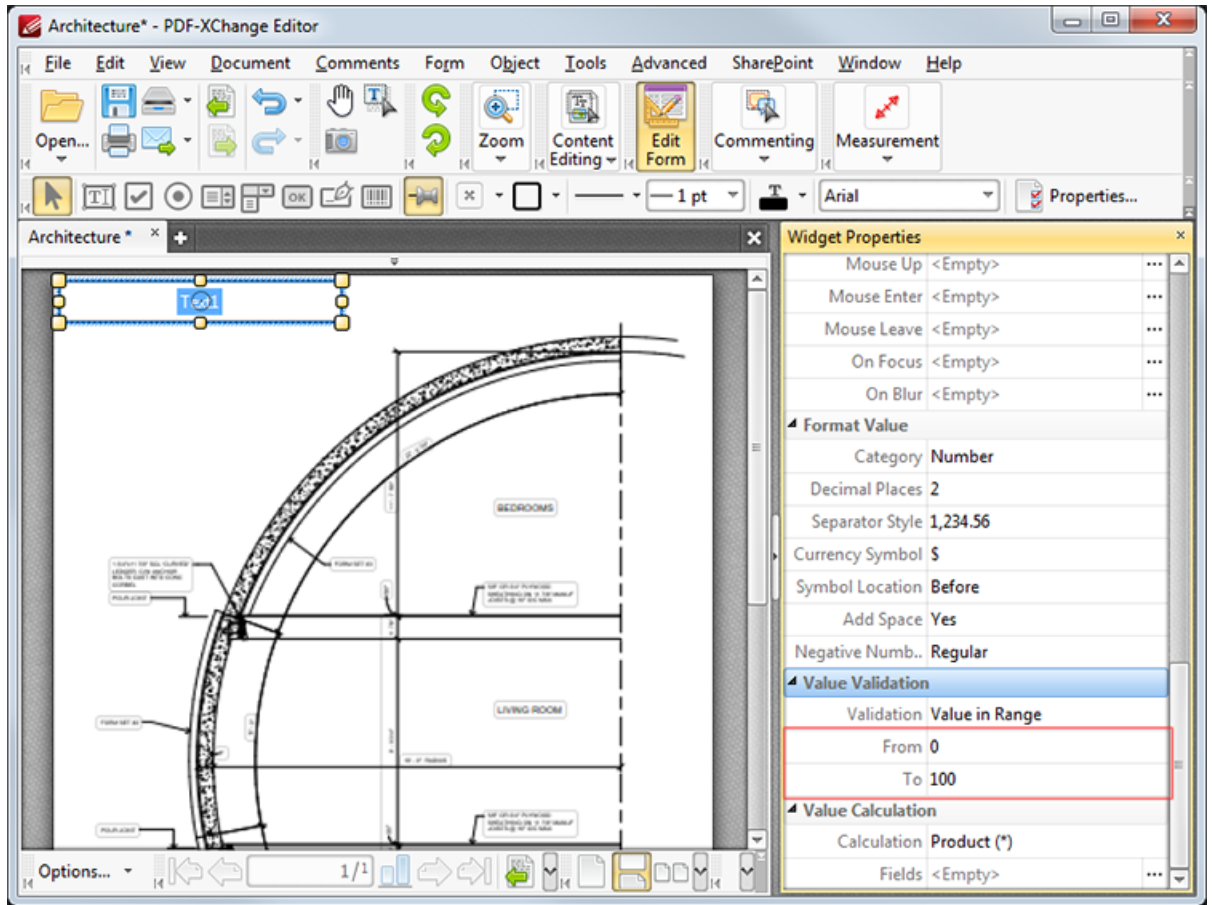
Figure 13. Value Validation Example, From/To Option

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 then an error message will appear.

▼ **Value Calculation Example**

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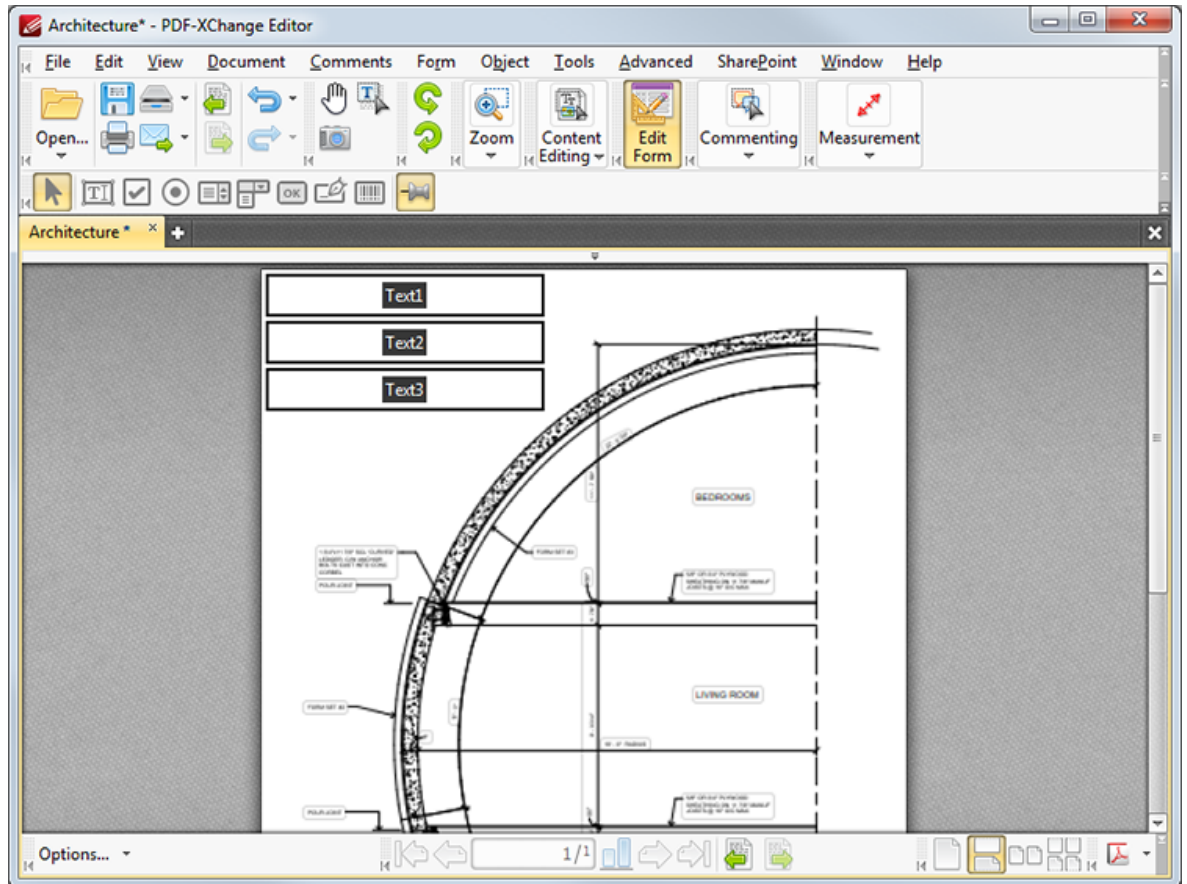
Figure 14. Value Calculation Example, Text Fields

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 **Widget Properties** pane will open:
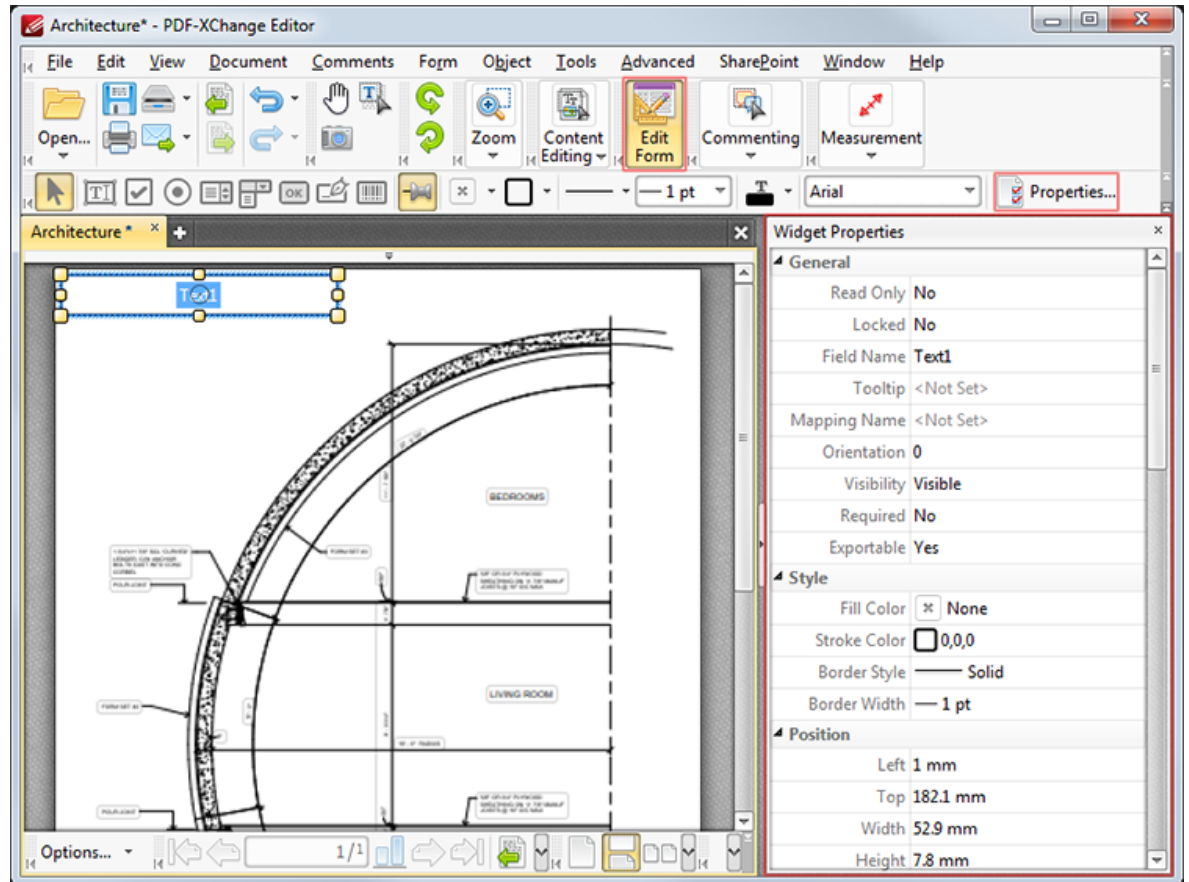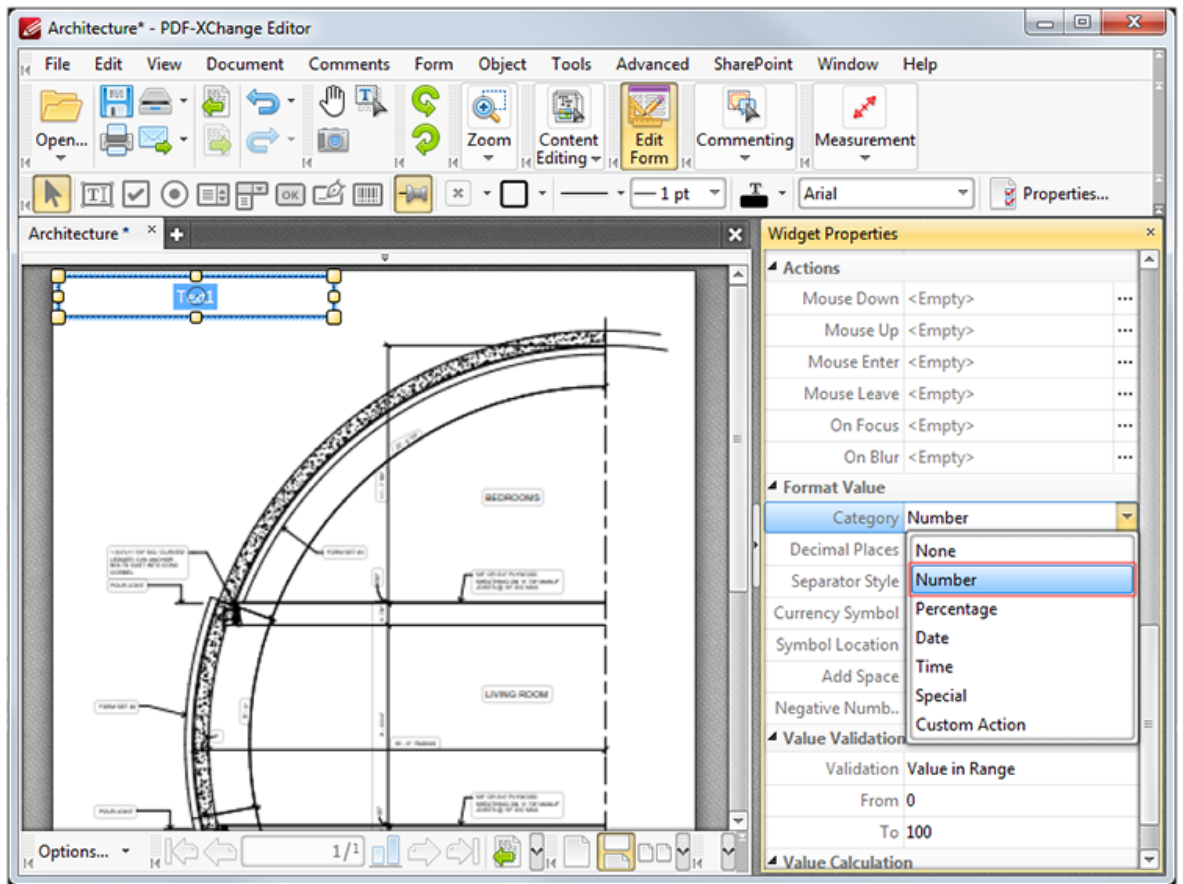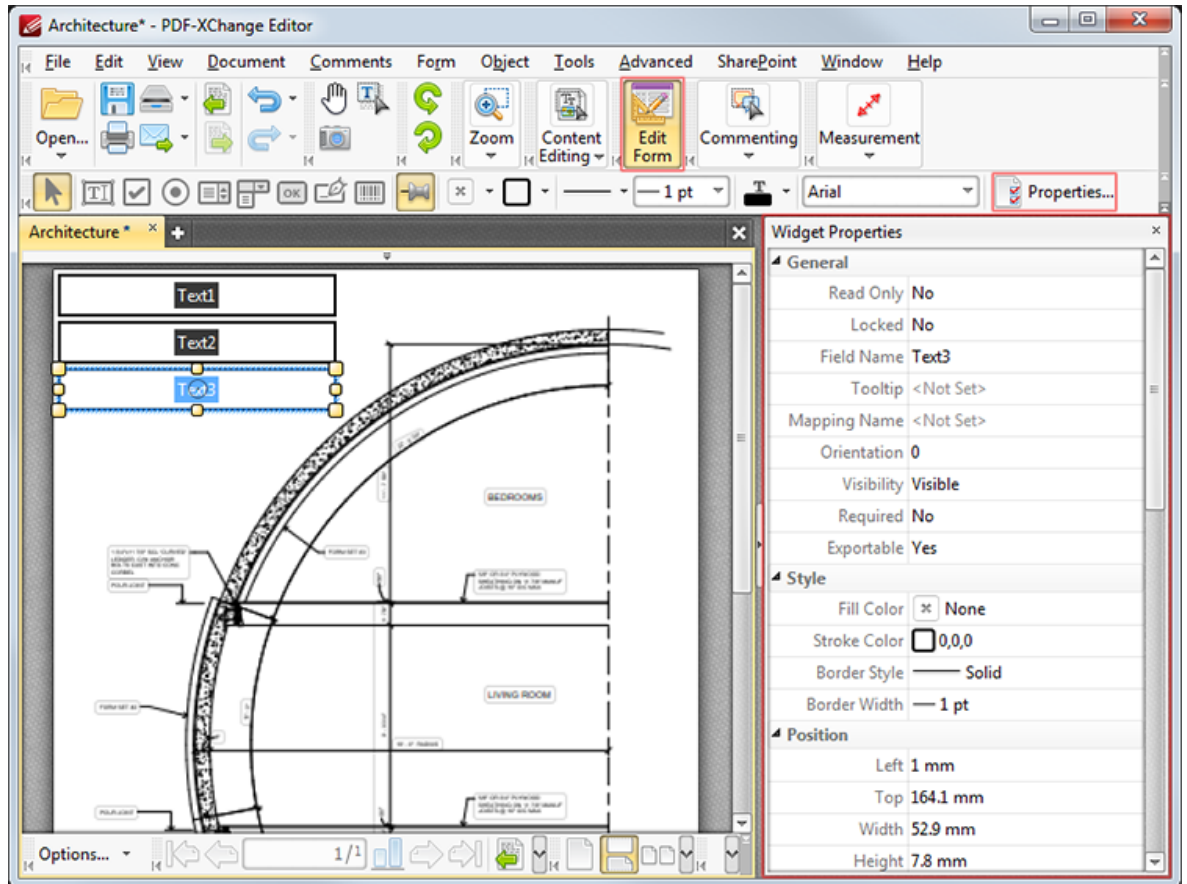
Figure 15. Value Calculation Example, Widget Properties Pane

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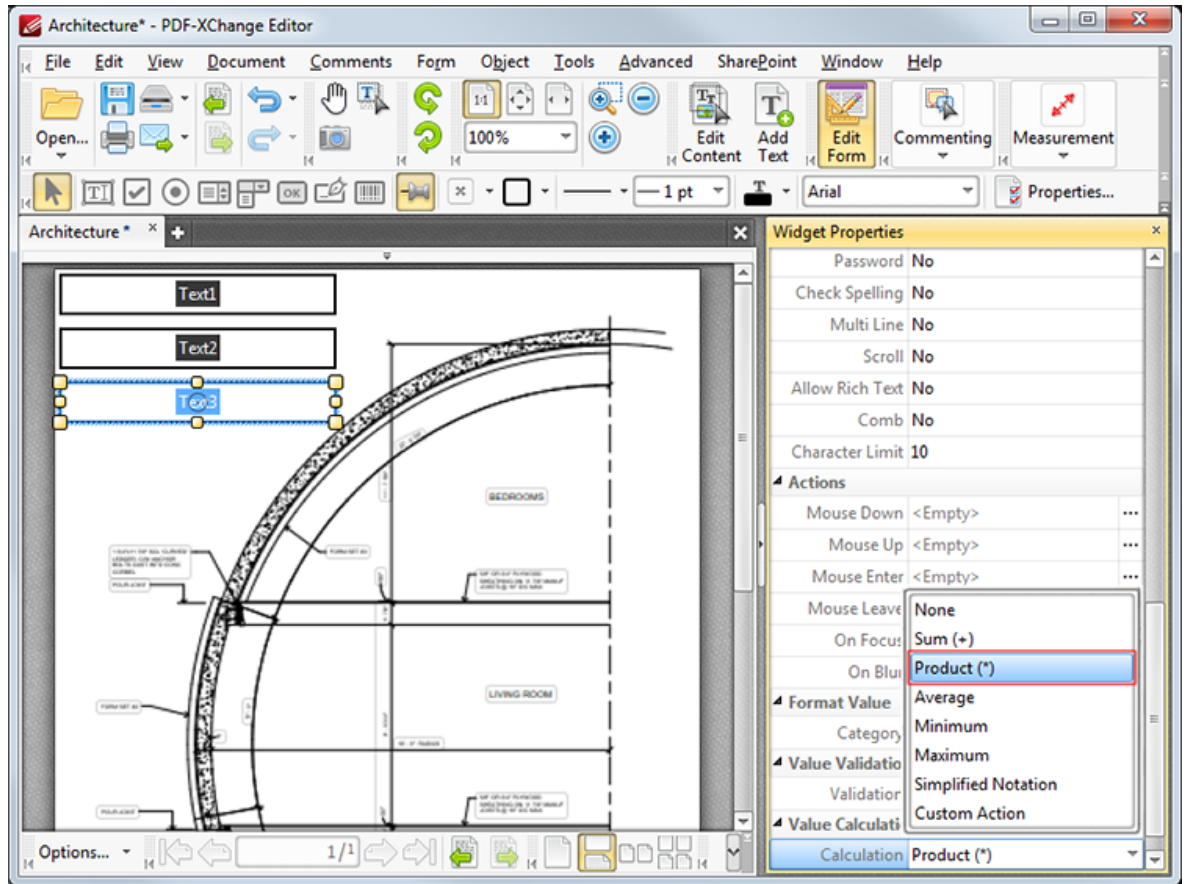
Figure 16. Value Calculation Example, Calculation Option

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** option. The **Fields Selection** dialog box will open. Select **'Text1'** and **'Text2',** then click **OK:**
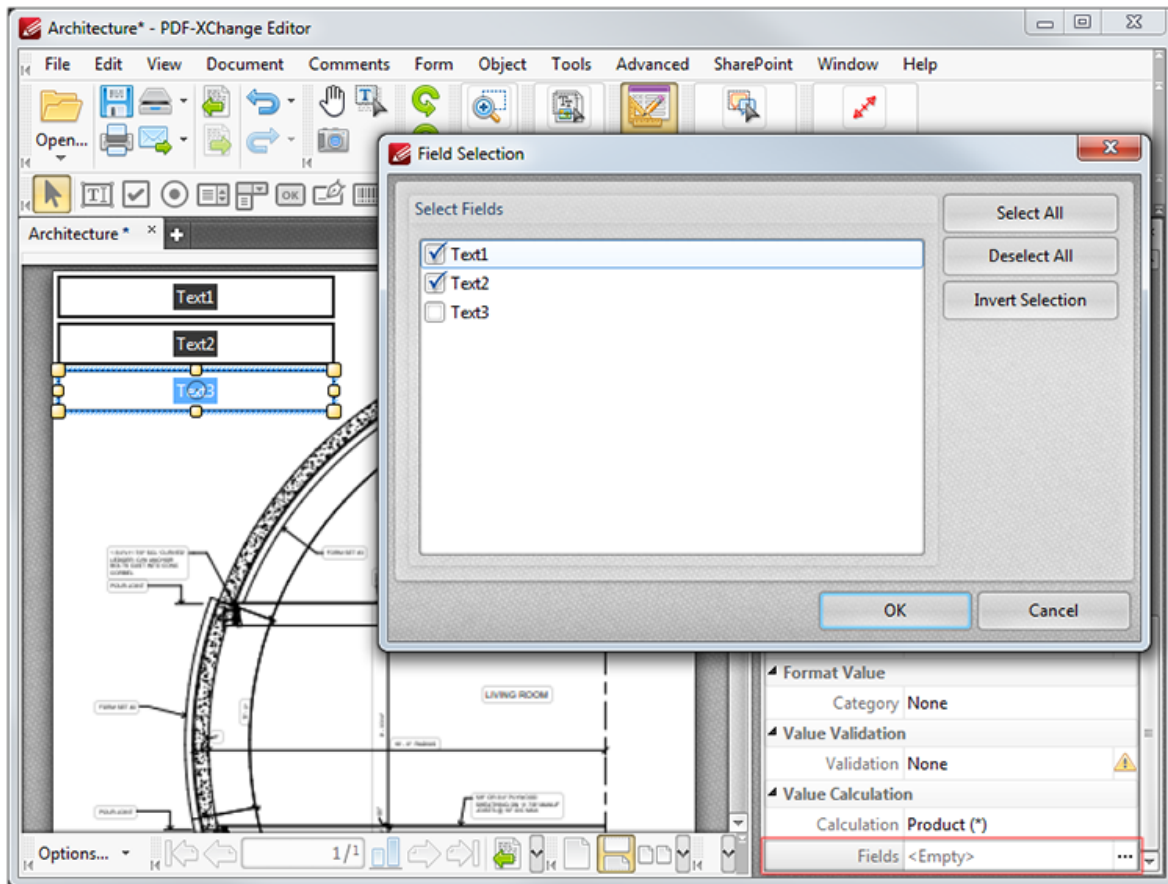
Figure 17. Value Calculation Example, Field Selection Dialog Box

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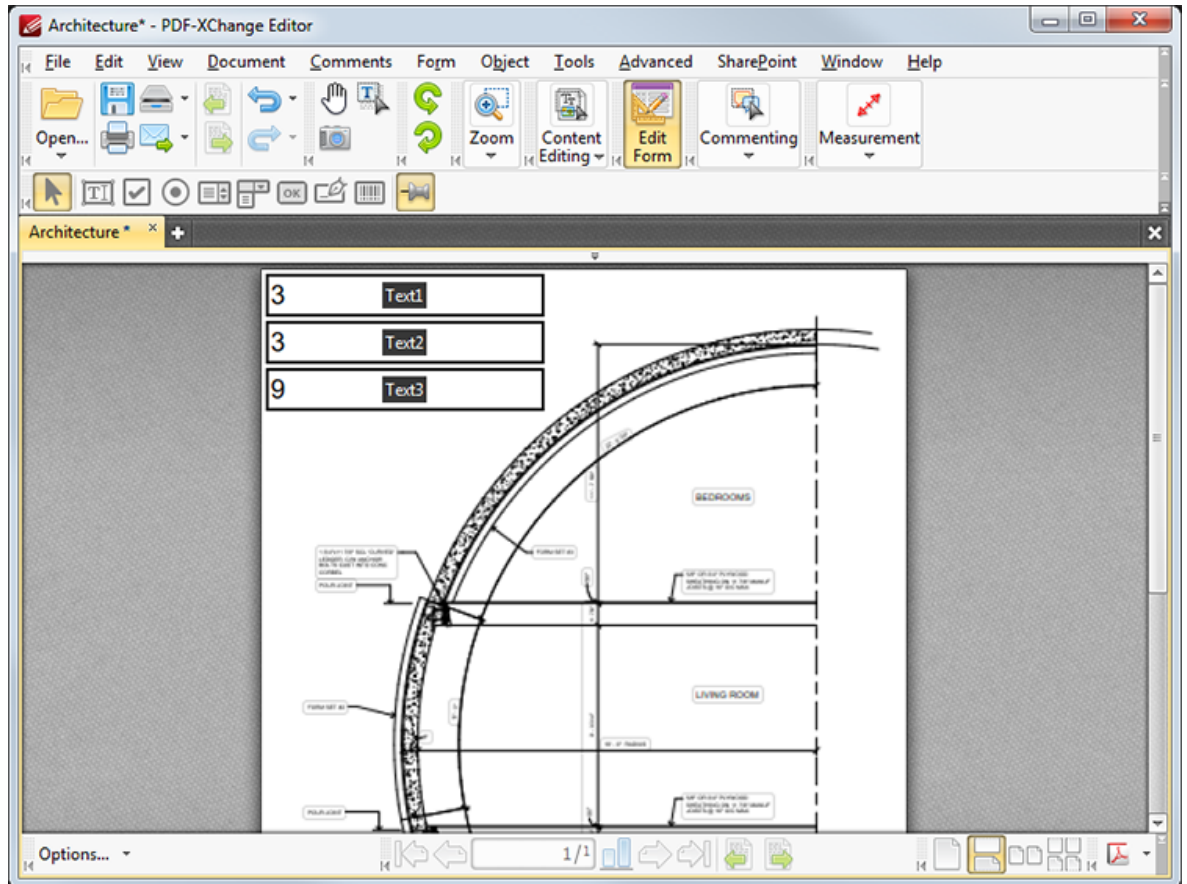
Figure 18. Value Calculation Example, Process Complete

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

Please note that the **Set Field Calculation Order** setting in the **Fields Pane** 519 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 have value calculation settings. Follow the steps below to determine the order of calculation:

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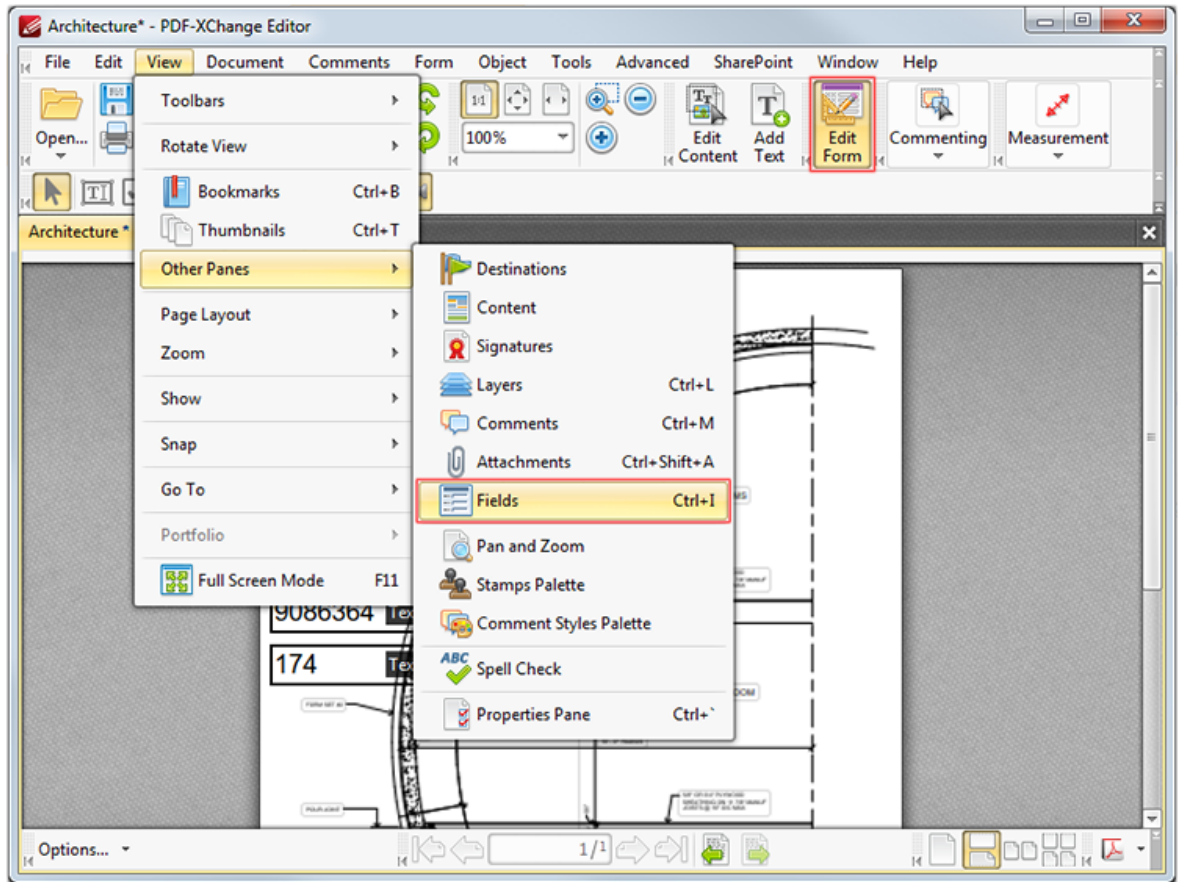
Figure 19. View Submenu, Other Panes, Fields

The **Fields** pane will open.

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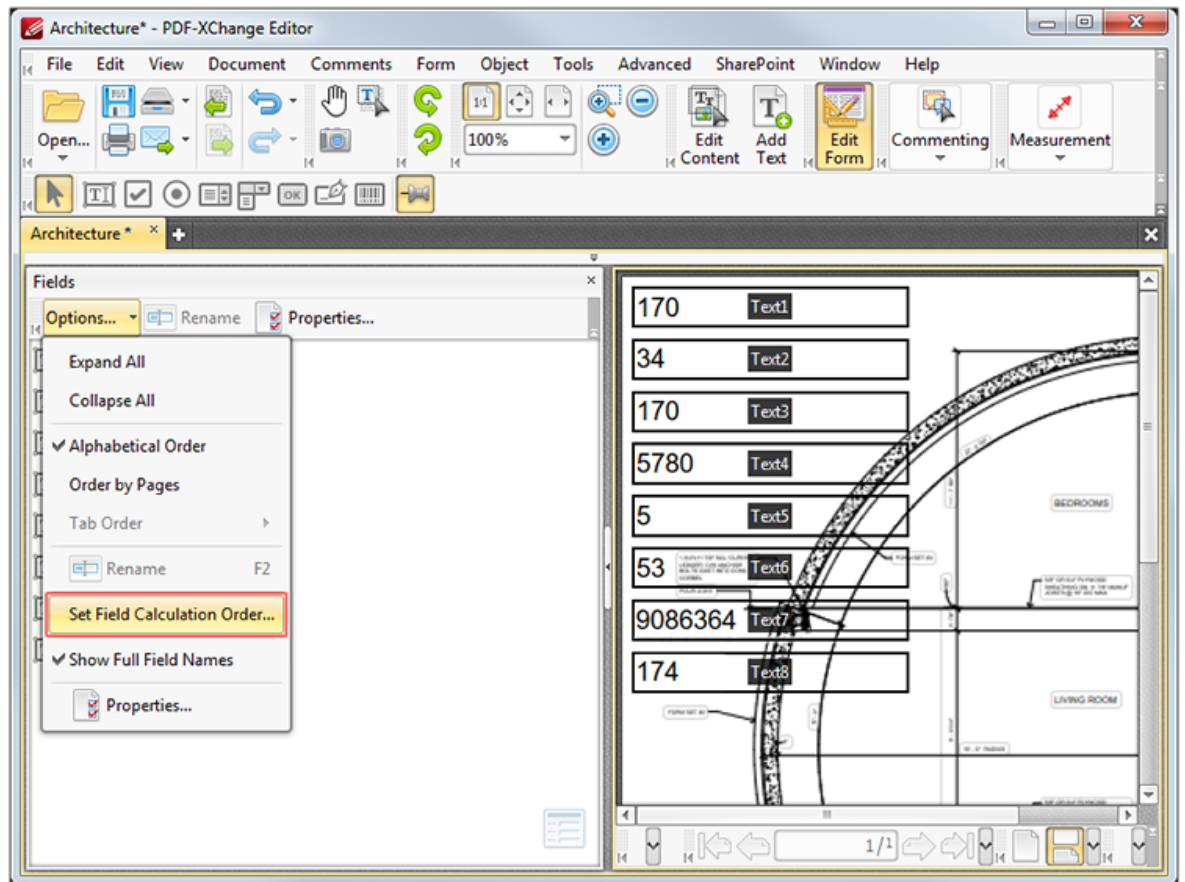
Figure 20. Fields Pane, Set Field Calculation Order

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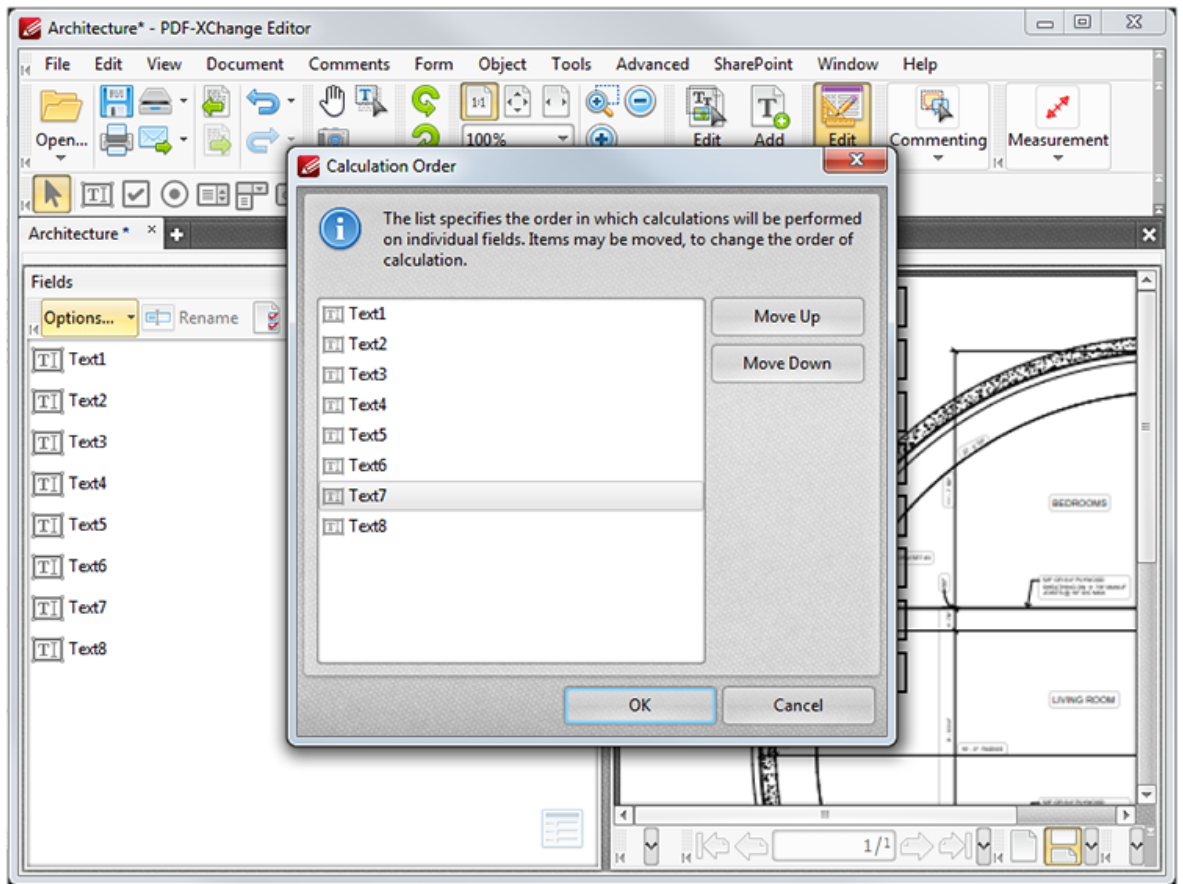
Figure 21. Calculation Order Dialog Box

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.

6.3.1.7.2 Add Check Boxes to Documents

Add Check Boxes to Documents

Check boxes allow users to make a binary choice that is one of two mutually exclusive options:
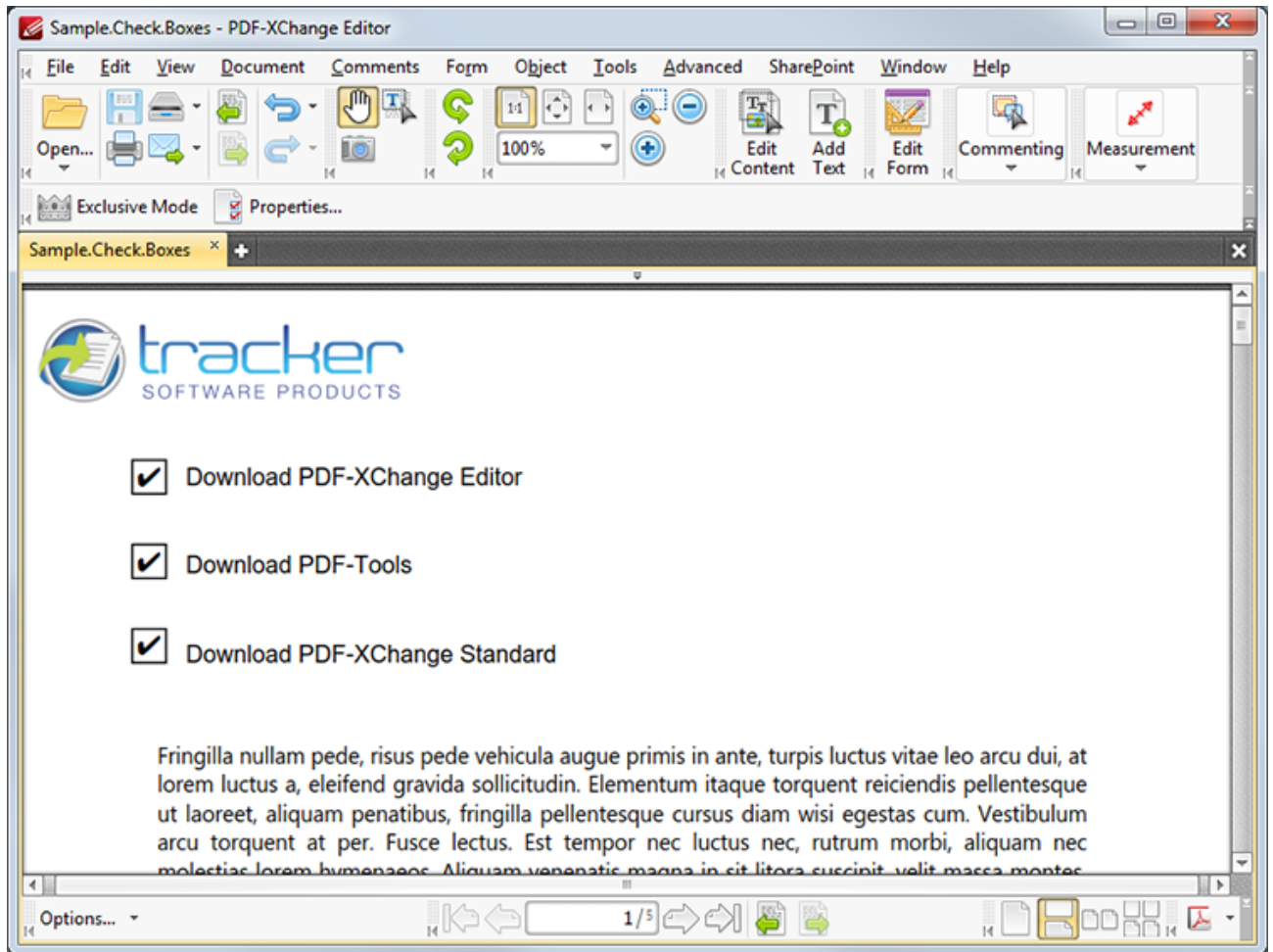
Figure 1. Example Check Boxes

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:
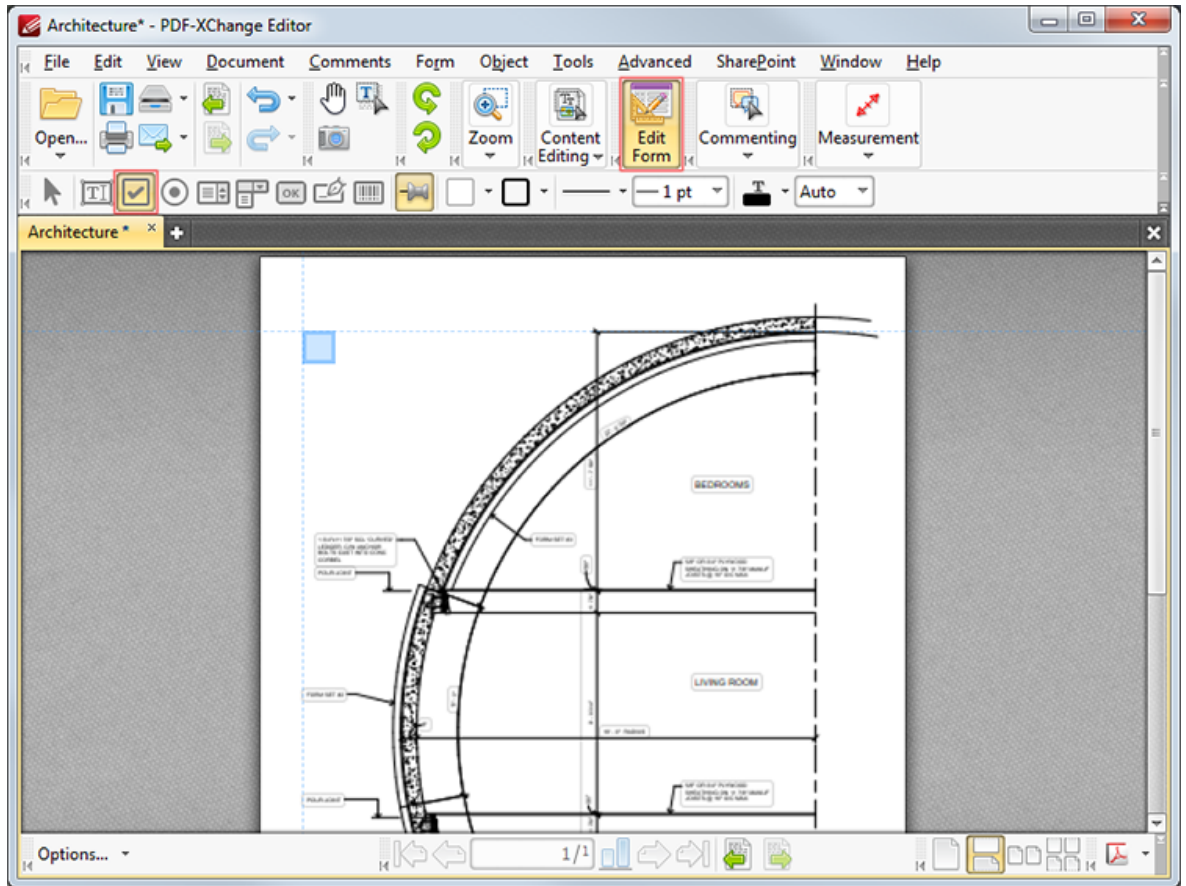
Figure 2. Active Check Box Tool

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** 525 to assist in the precise placement of check boxes). Added check boxes appear as below:
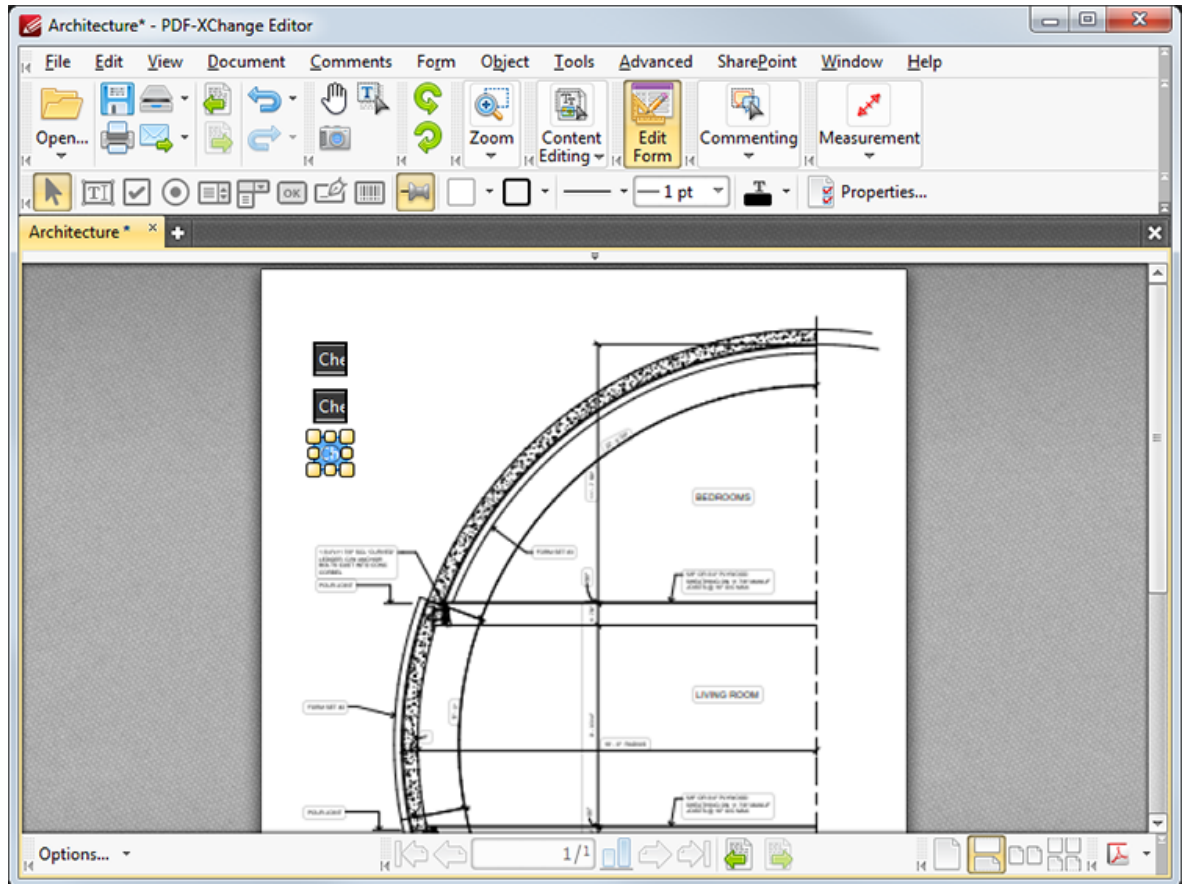
Figure 3. Added Check Boxes

- Click and drag the yellow control points to resize check boxes.
- Use the options in the **Properties Toolbar** [484] 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 **Widget Properties** pane, which enables the customization of additional elements of check boxes.

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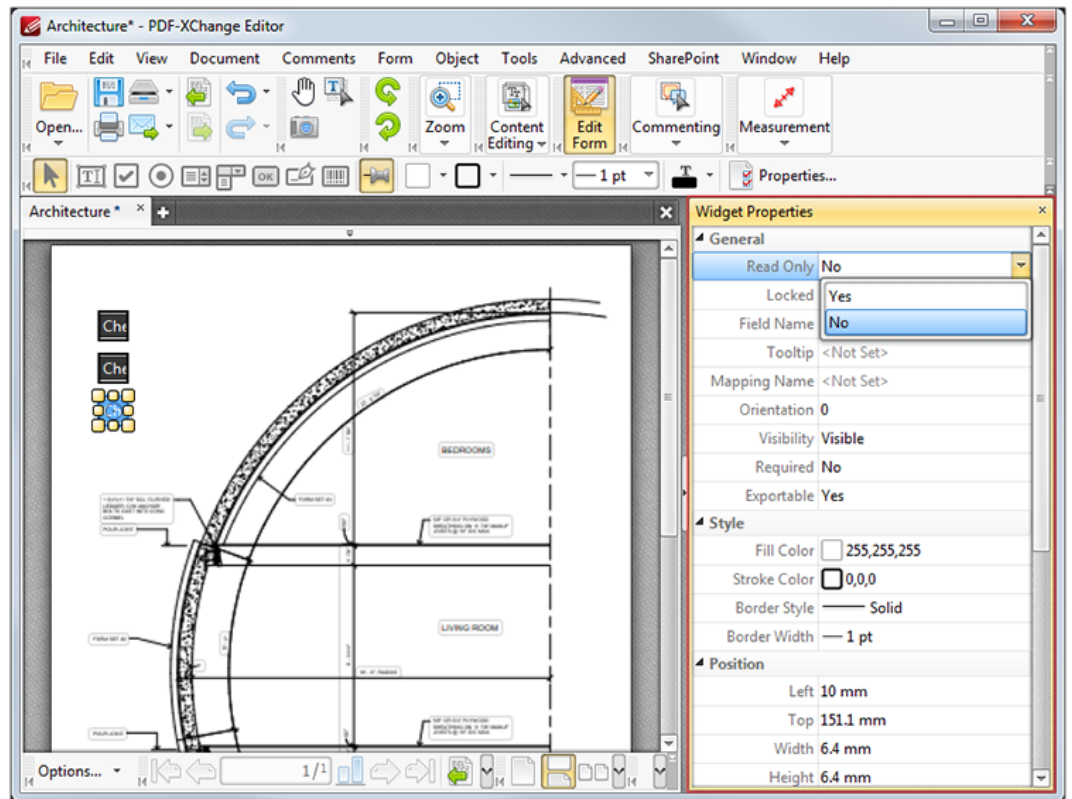
Figure 4. Check Box Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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:
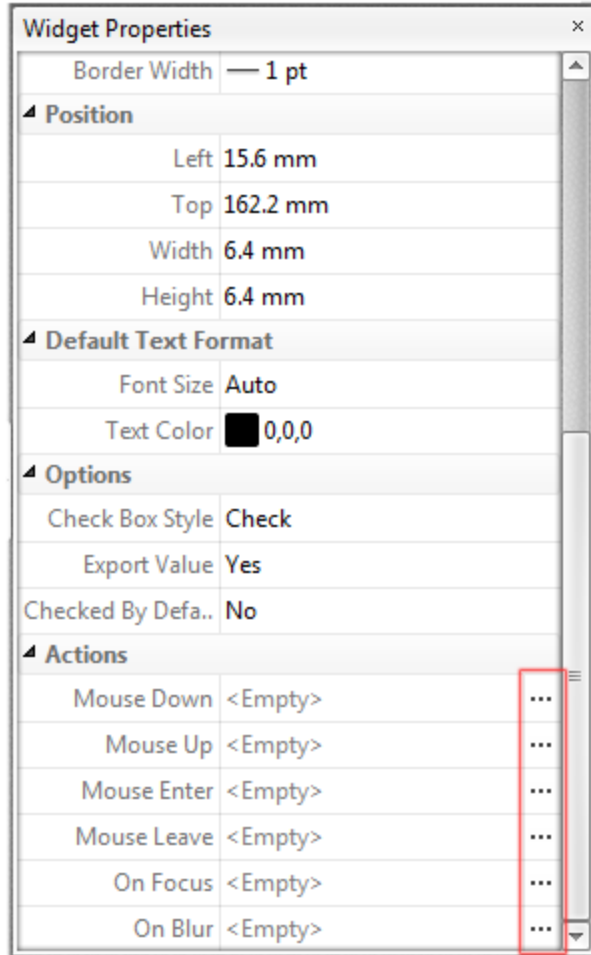
Figure 5. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 738

▼ **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):
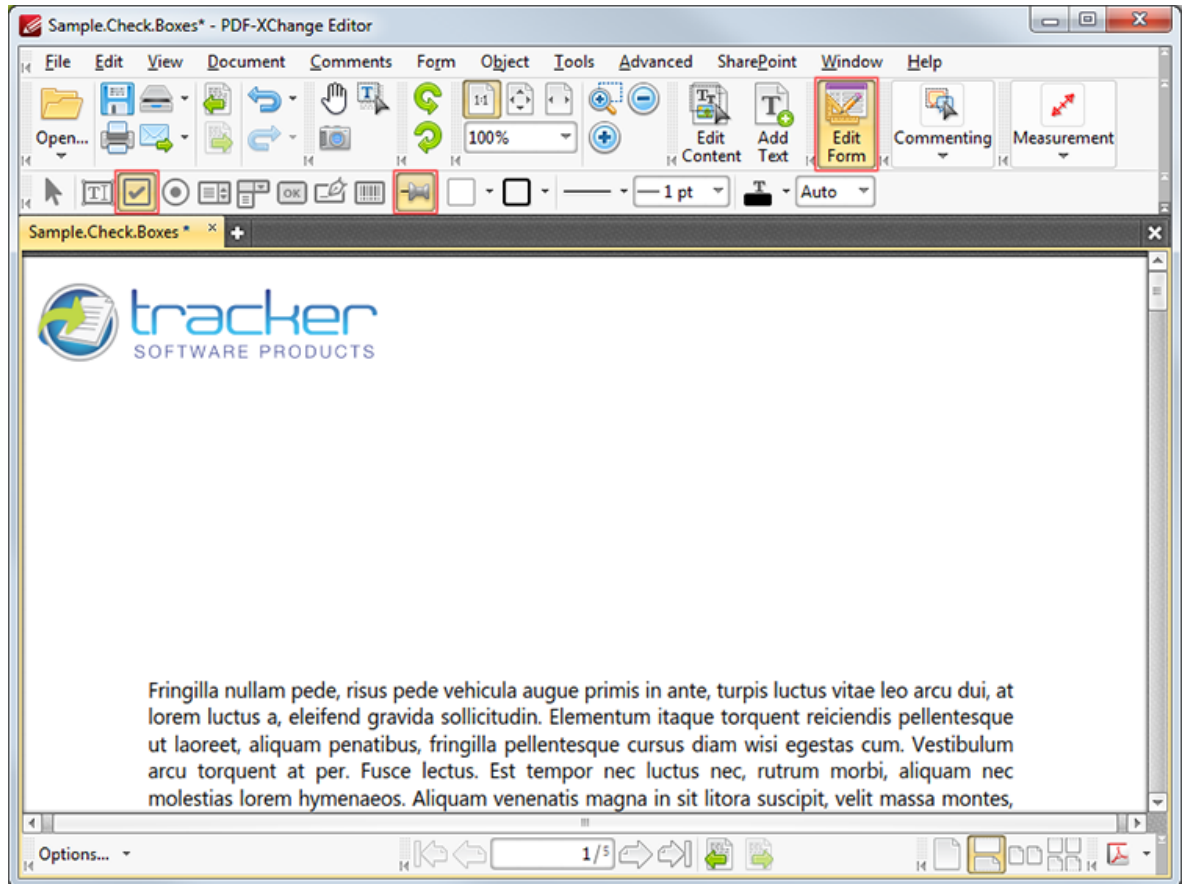
Figure 6. Check Box Creation Tool

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:
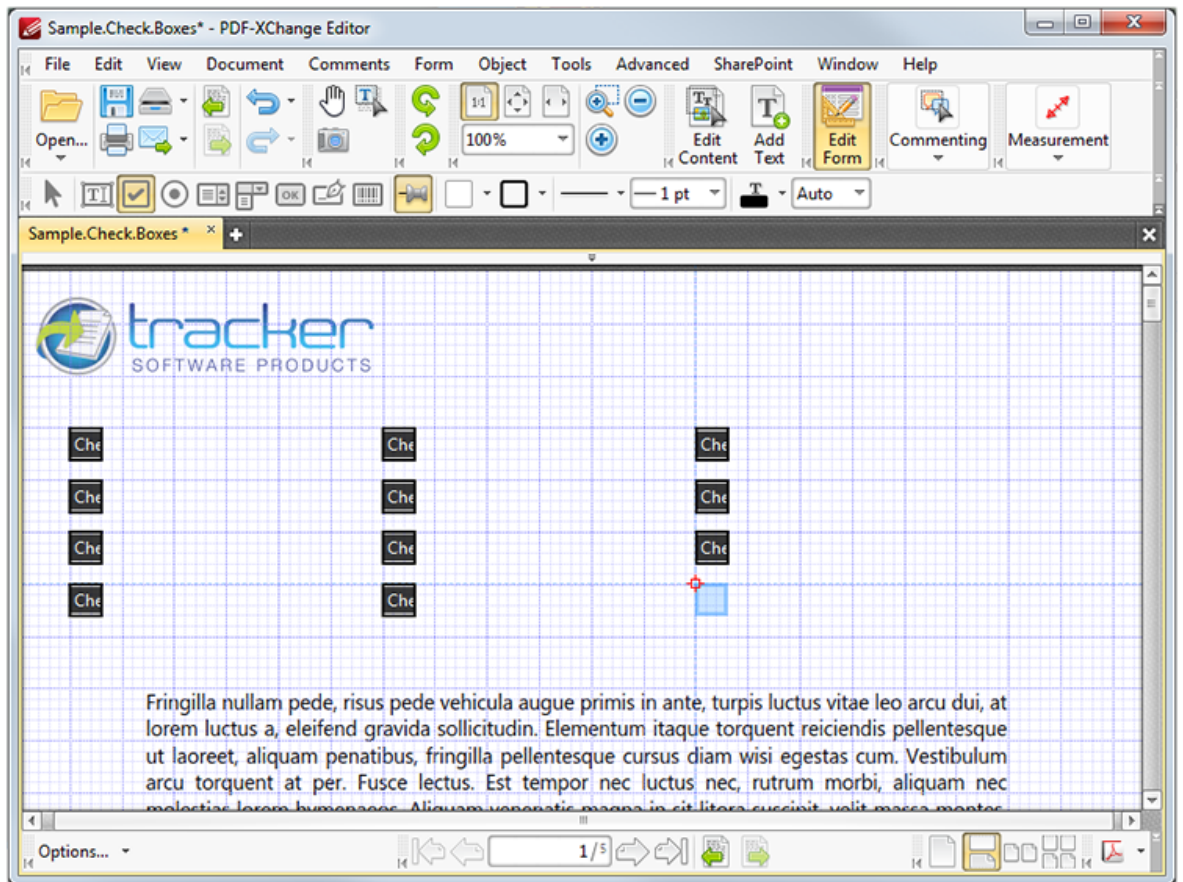
Figure 7. Adding Check Boxes

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

3. Click **Commenting,** then click the **Text Box** tool in the submenu:
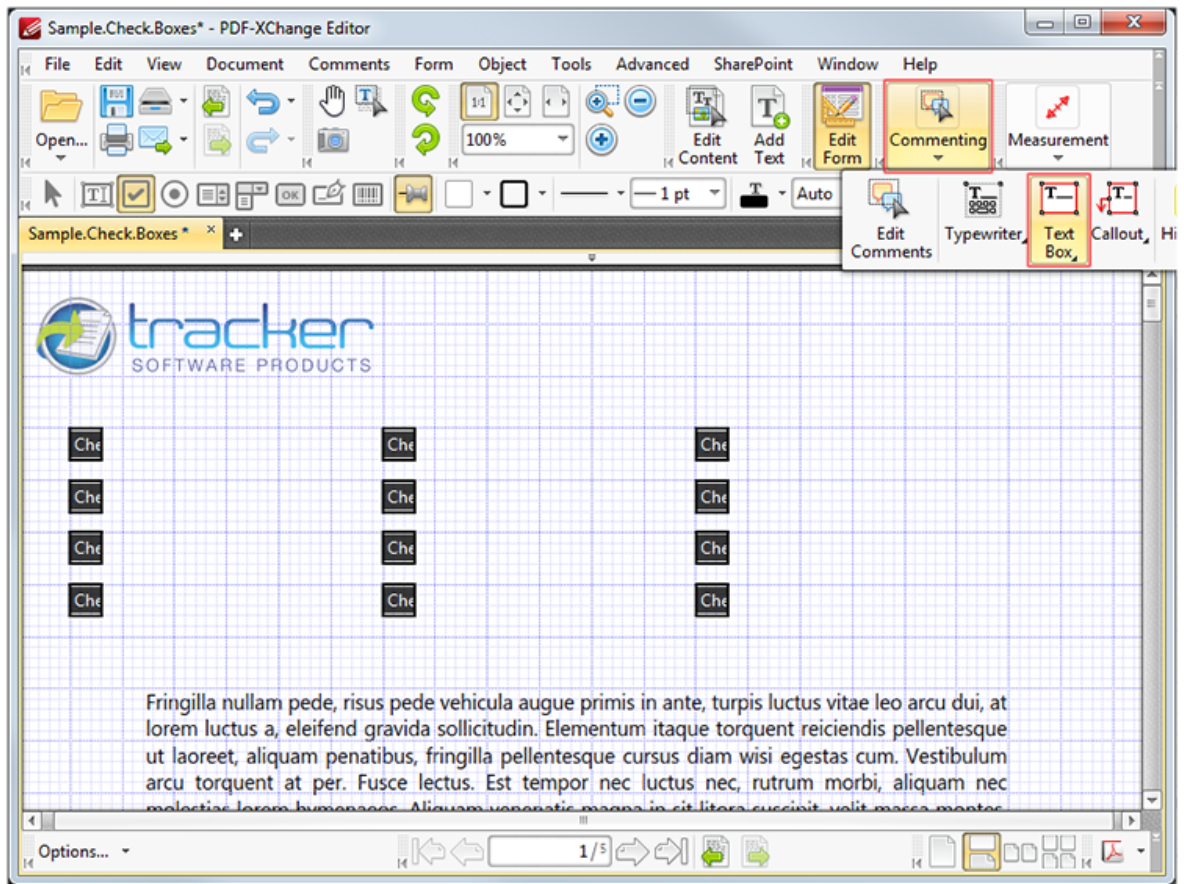
Figure 8. Commenting Toolbar, Text Box Tool Selected

4. Click **Keep Selected** (highlighted in the image below) in the **Properties Toolbar,** then click to add text boxes and enter the names of the months of the year:
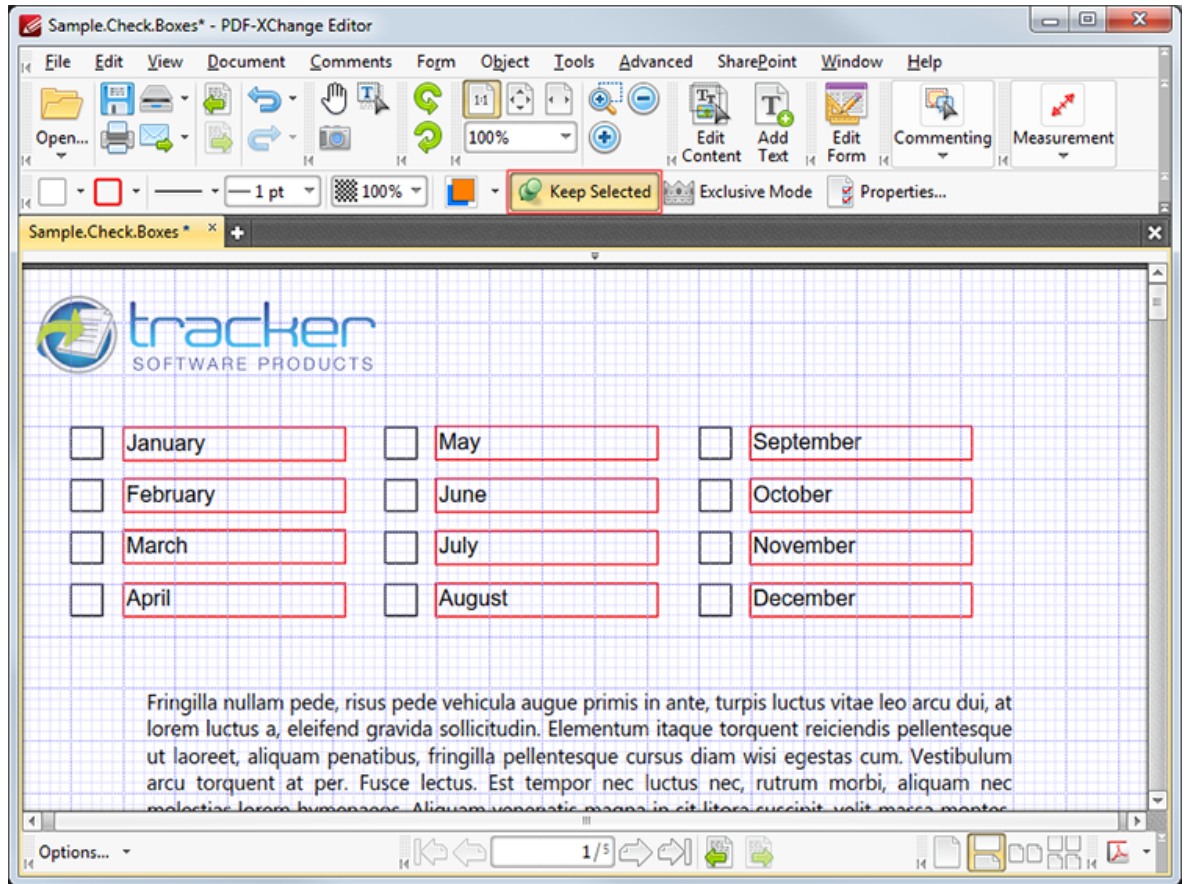
Figure 9. Added Text Box Labels

The next step is to remove the default borders of the text boxes, as they do not look ideal for this document:

5. Click **Commenting,** then click **Edit Comments** in the submenu:
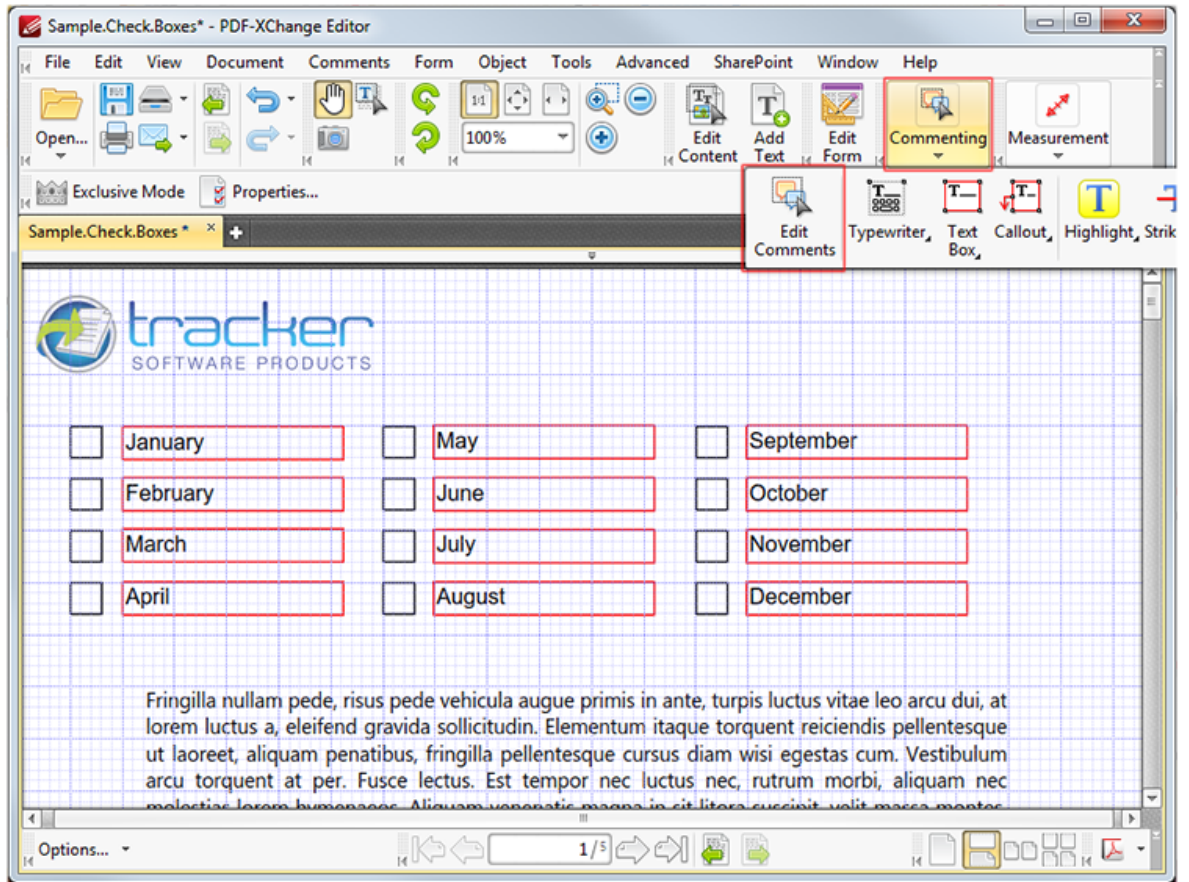
Figure 10. Commenting Toolbar, Edit Comments Selected

6. Group-select the text boxes, then click **Stroke Color** in the **Properties Toolbar** and select white:
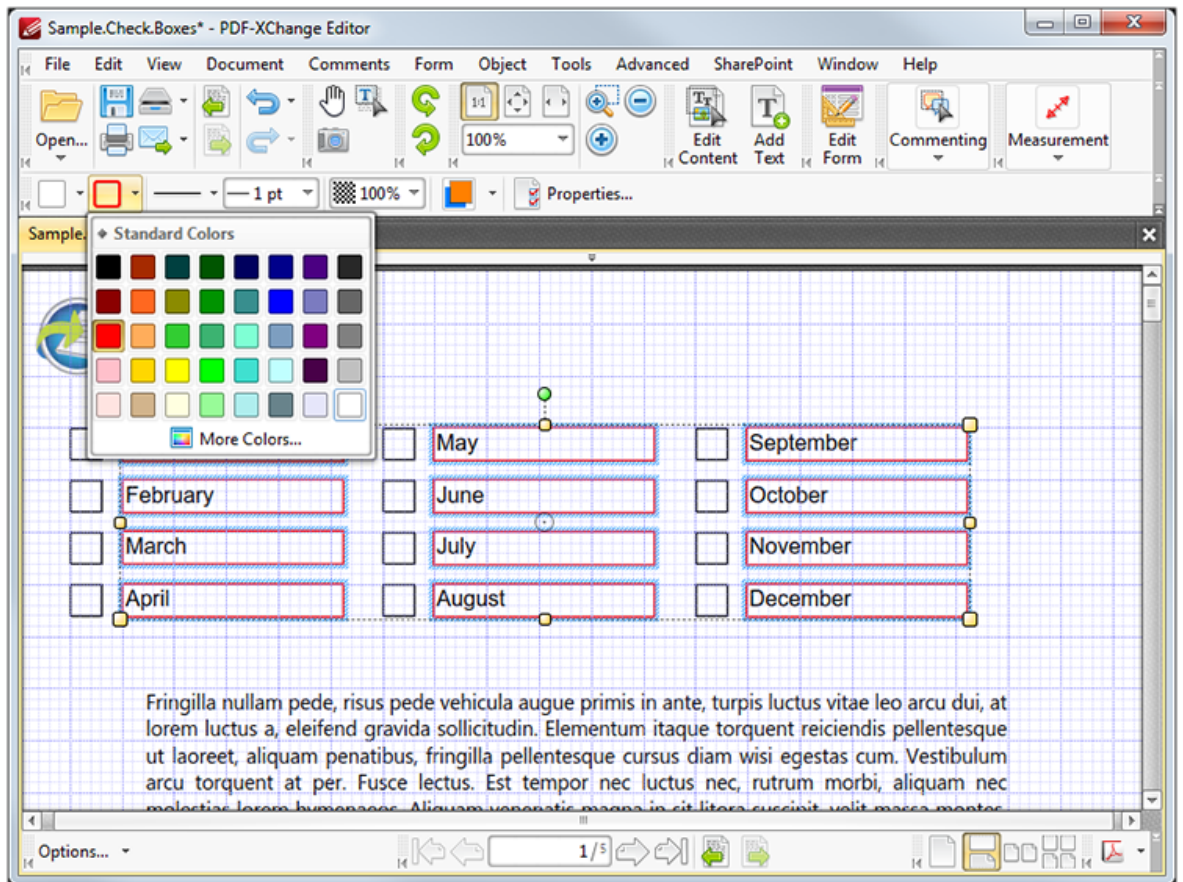
Figure 11. Properties Toolbar, Stroke Color

7. Press Ctrl+' to disable the grid. The check box list is then complete. Click the **Hand Tool** to select check boxes as desired:
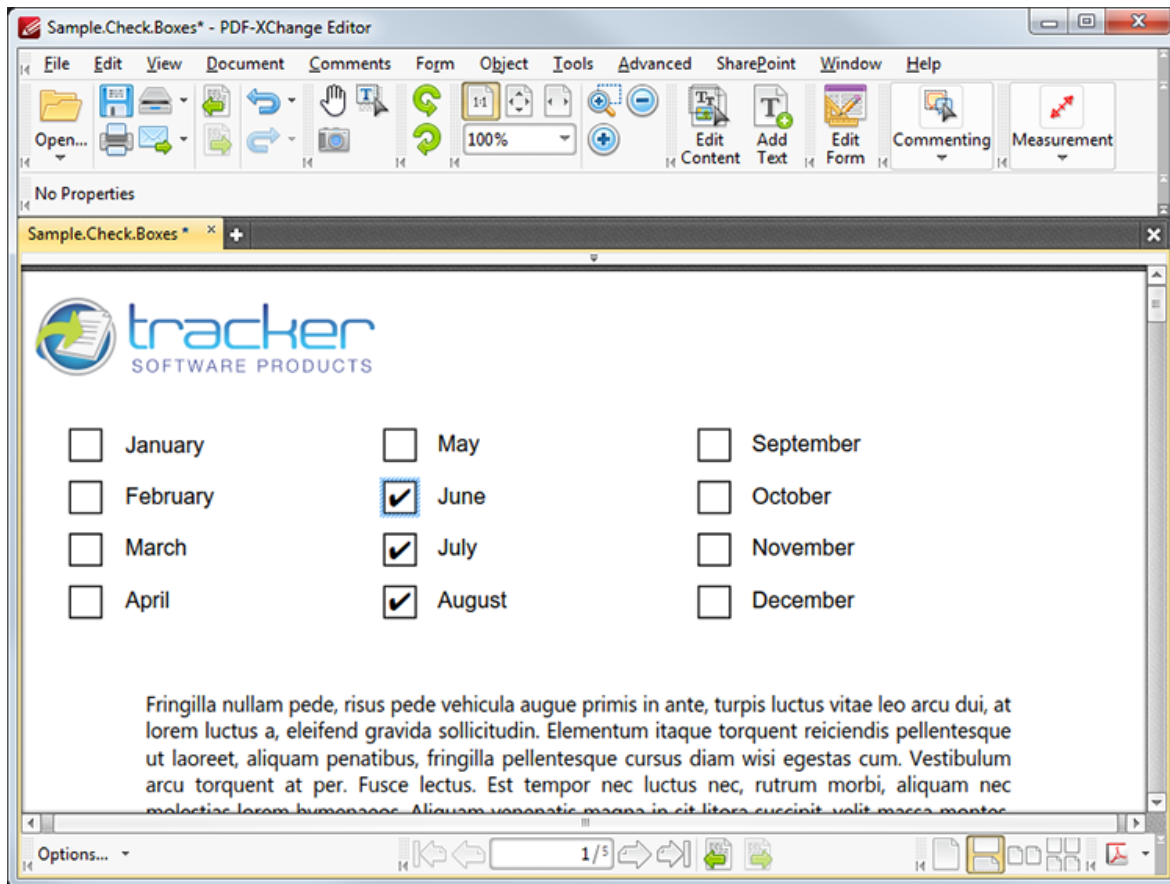
Figure 12. Completed Check Box List

6.3.1.7.3 Add Radio Buttons to Documents

Add Radio Buttons to Documents

Radio buttons allow users to make a single choice from several options, such as in answers to multiple choice questions:
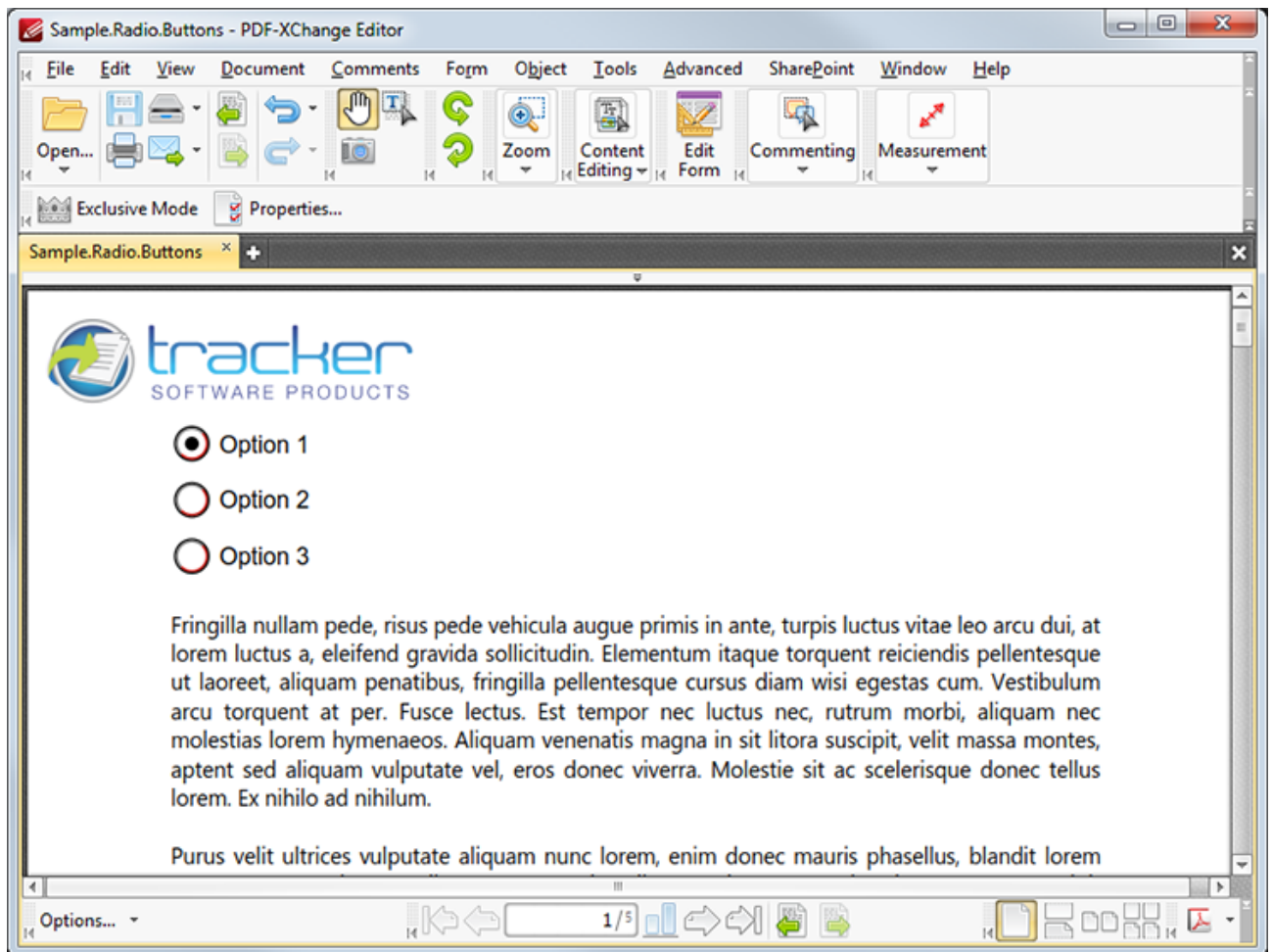
Figure 1. Example Radio Buttons

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:
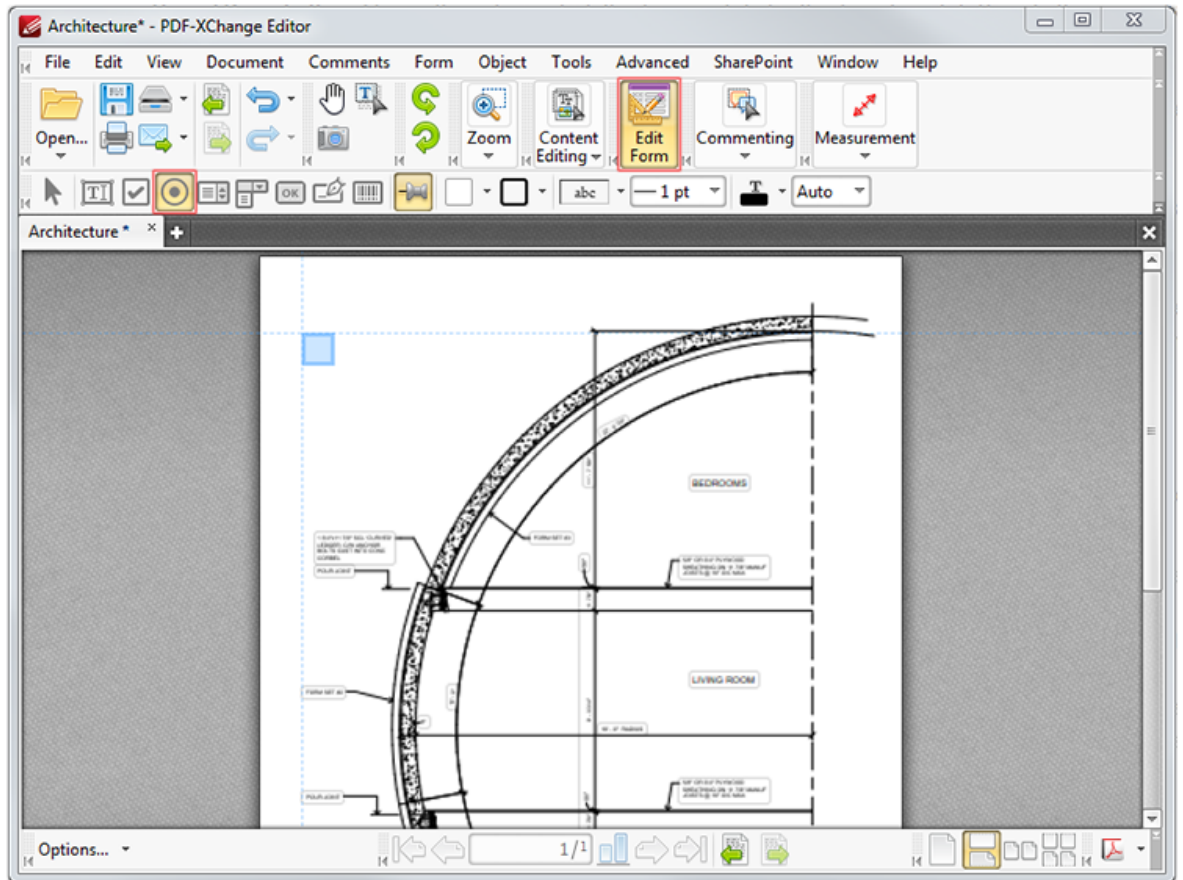
Figure 2. Active Radio Button Tool

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** ⌐525⌐ to assist in the precise placement of radio buttons). Added radio buttons appear as below:
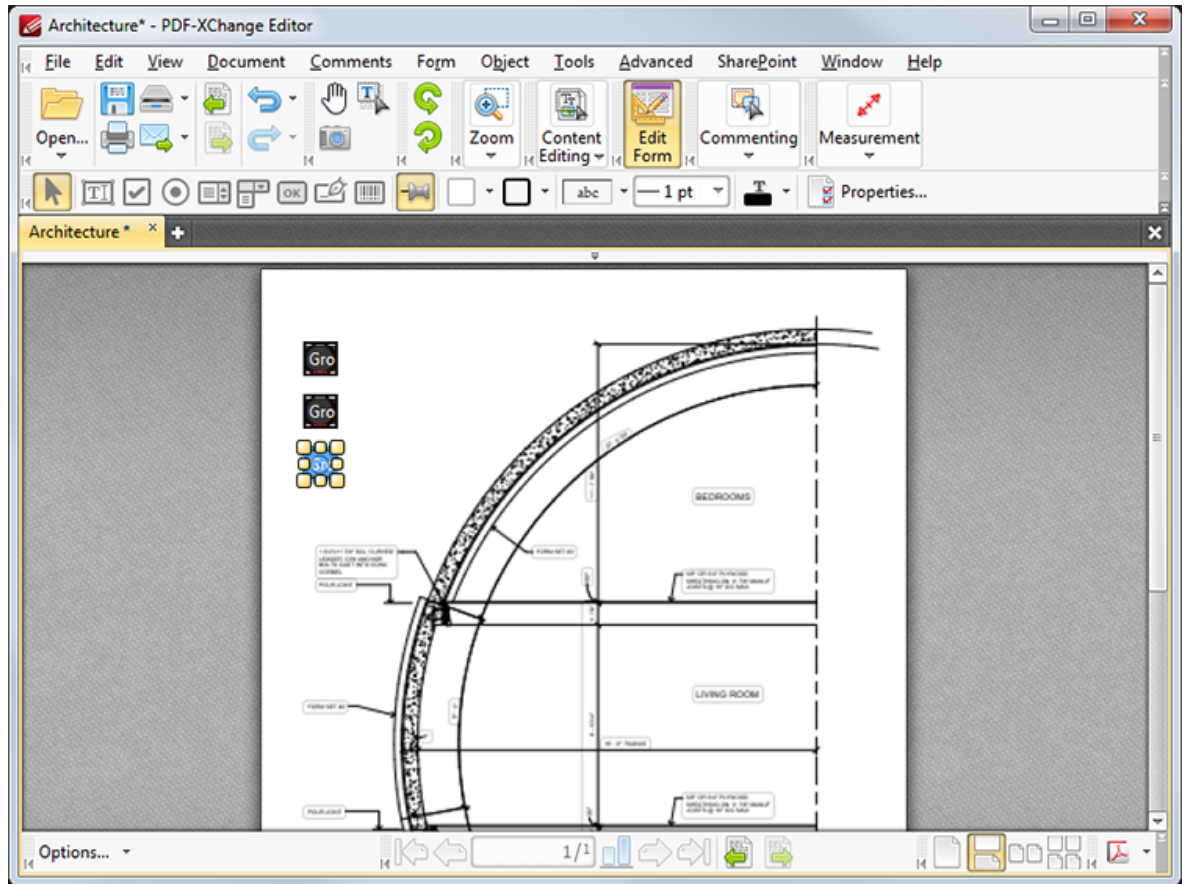
Figure 3. Added Radio Buttons

- Click and drag the yellow control points to resize radio buttons.
- Use the options in the **Properties Toolbar** ⌐484⌐ 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 **Widget Properties** pane, which enables the customization of additional elements of radio buttons.

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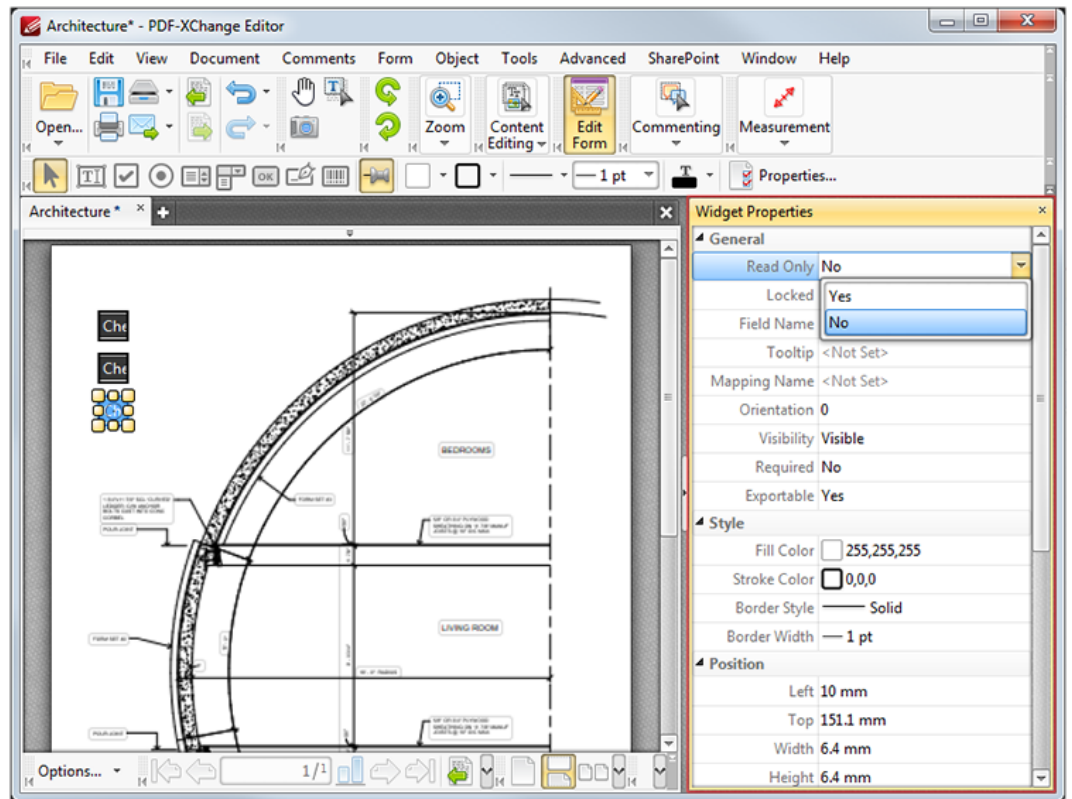
Figure 4. Check Box Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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:
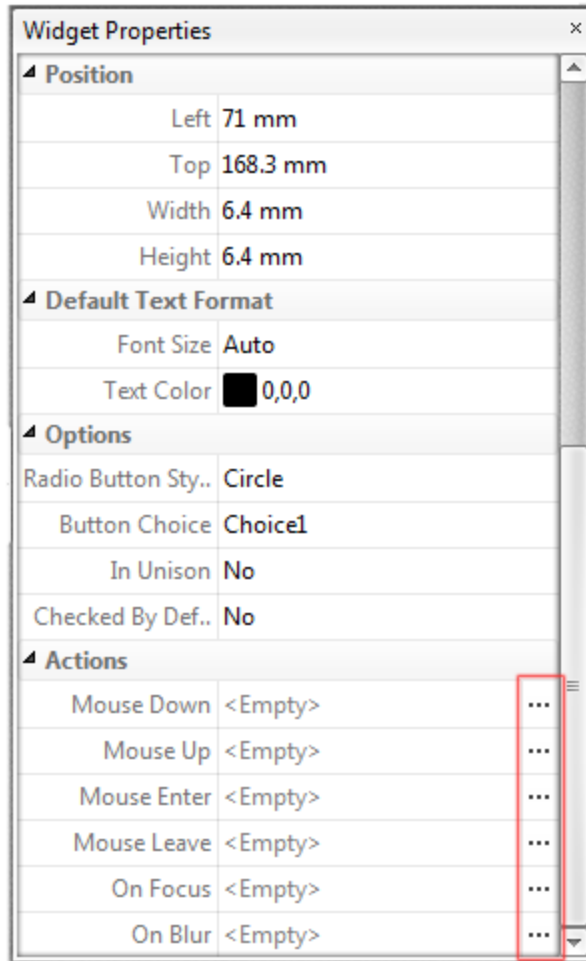
Figure 5. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 738

▼ **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):
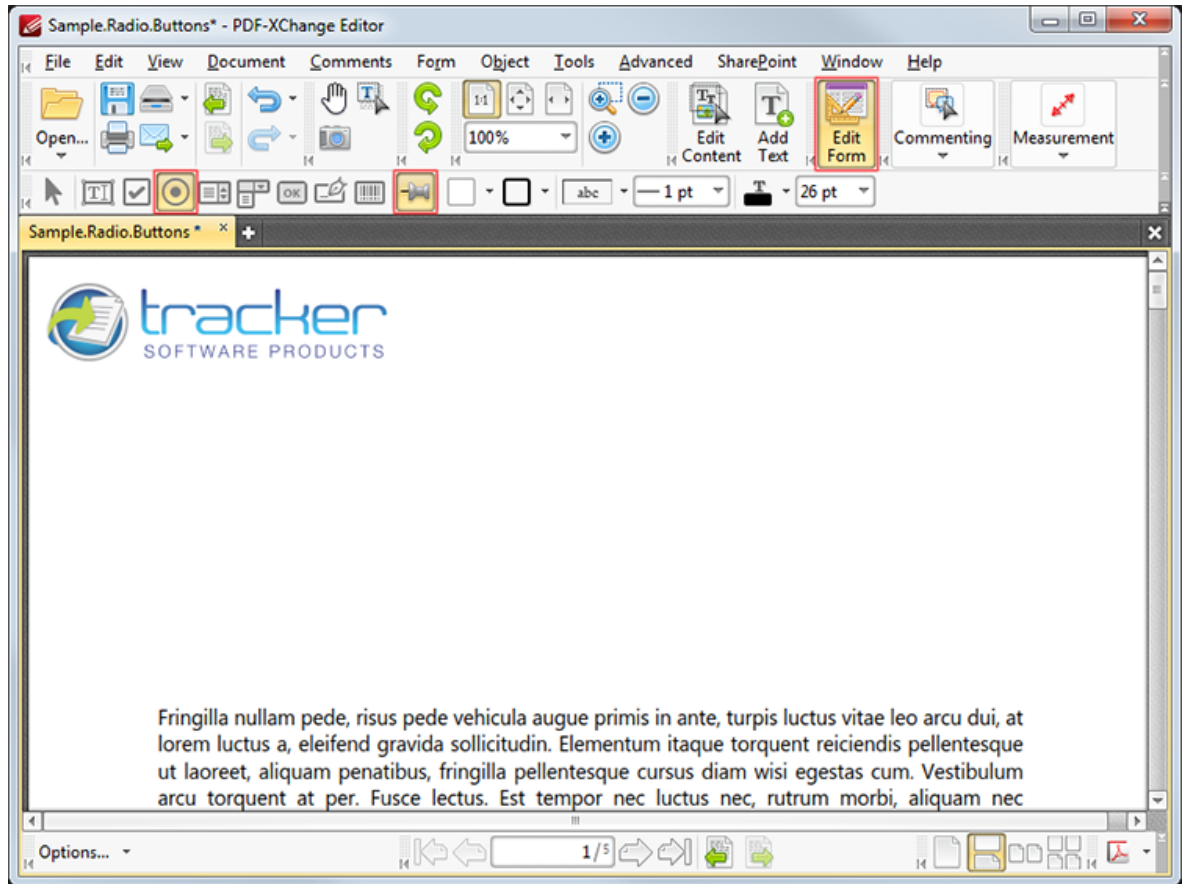
Figure 6. Radio Button Creation Tool

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:
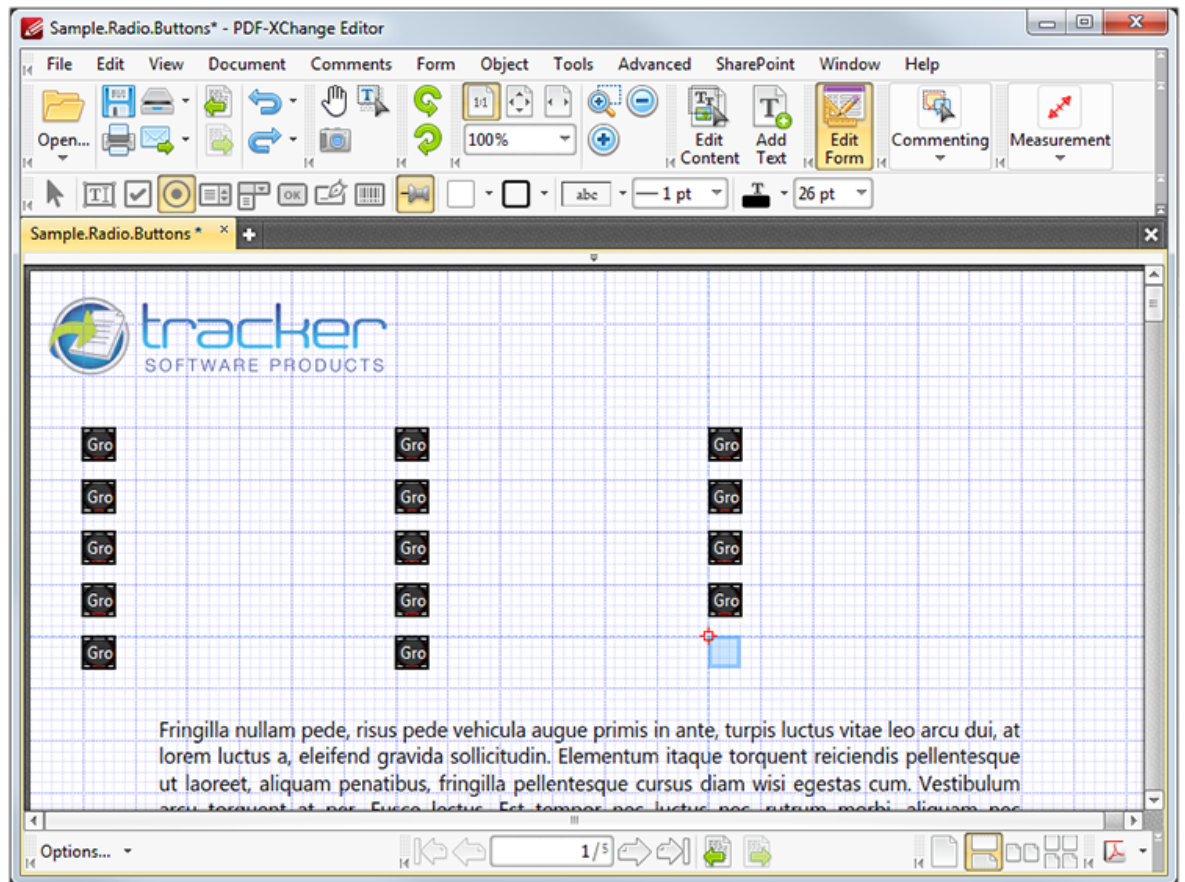
Figure 7. Adding Radio Buttons

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

3. Click **Commenting,** then click the **Text Box** tool in the submenu:
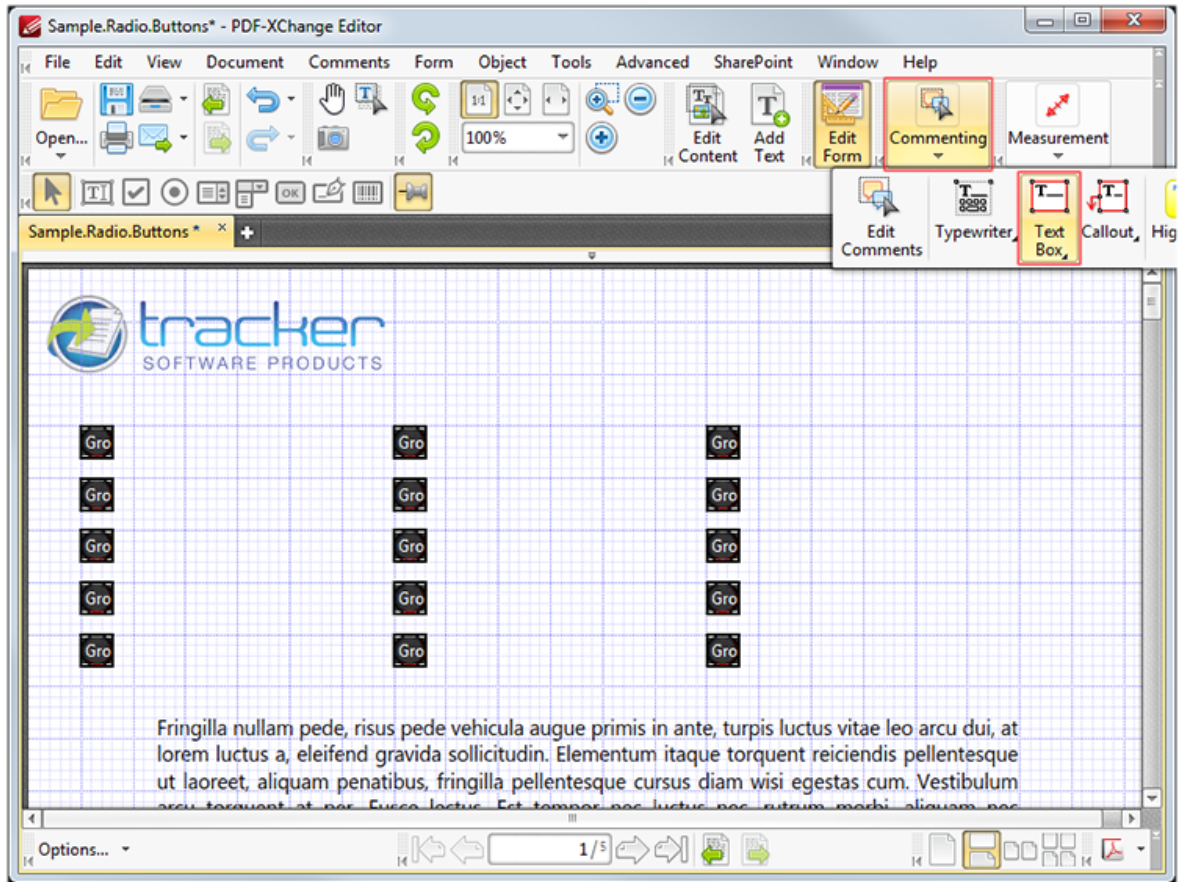
Figure 8. Commenting Toolbar, Text Box Tool Selected

4. Click **Keep Selected** (highlighted in the image below) in the **Properties Toolbar,** then click to add text boxes and enter the names of the desired countries:
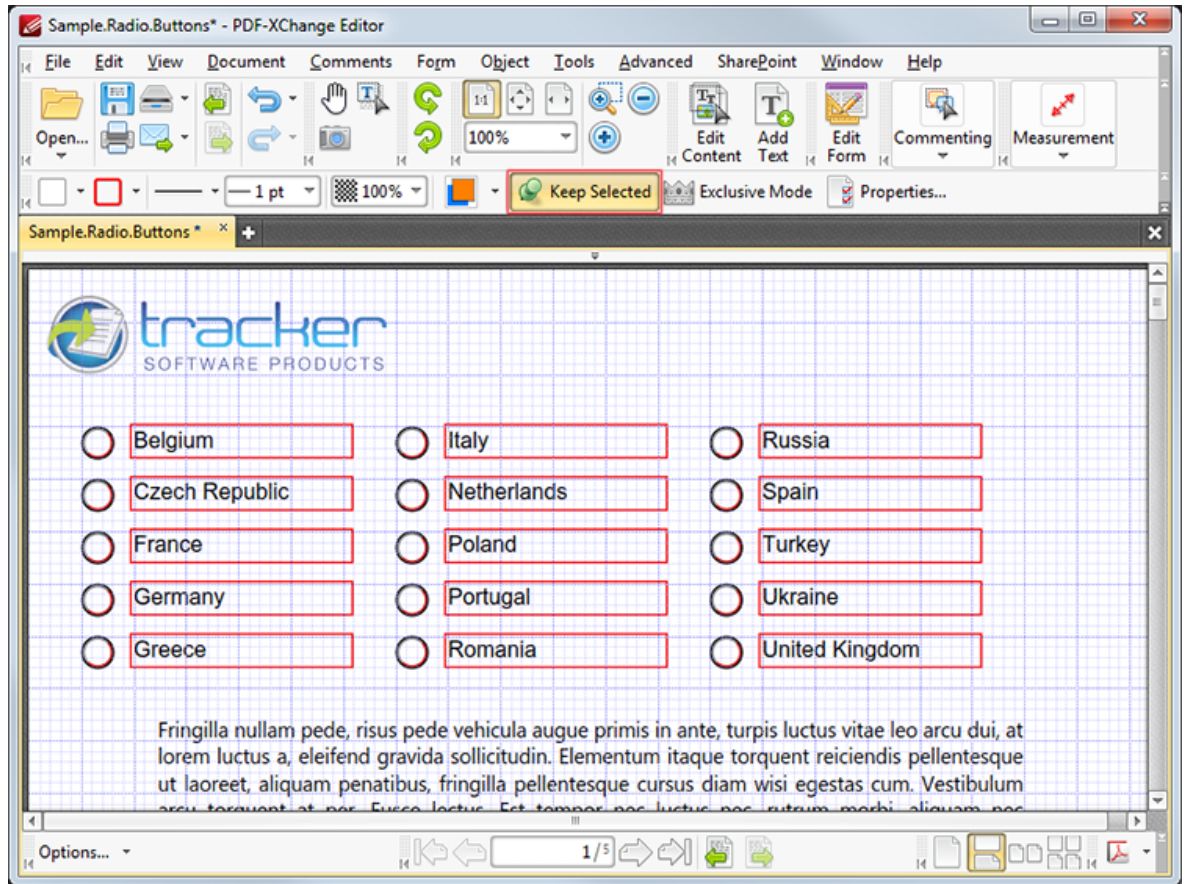
Figure 9. Added Text Box Labels

The next step is to remove the default borders of the text boxes, as they do not look ideal for this document:

5. Click **Commenting,** then click **Edit Comments** in the submenu:
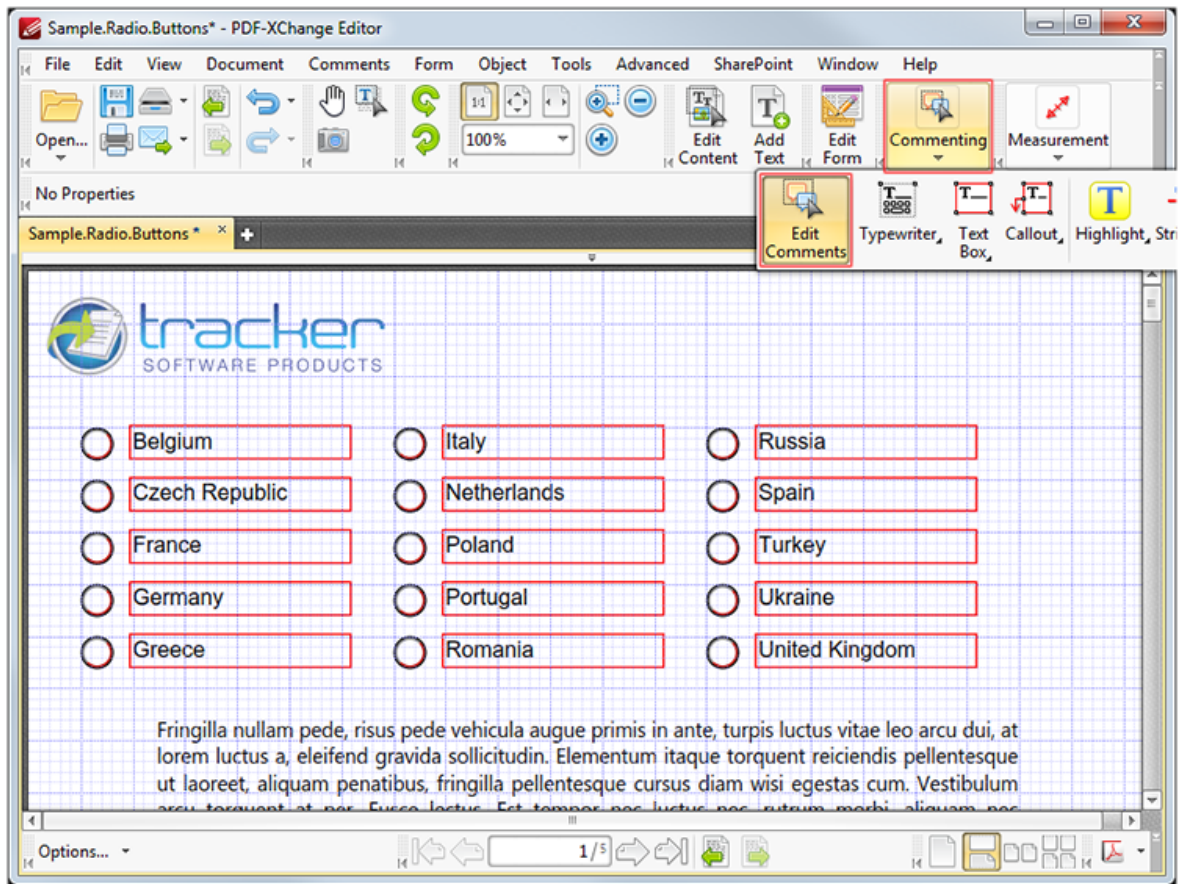
Figure 10. Commenting Toolbar, Edit Comments Selected

6. Group-select the text boxes, then click **Stroke Color** in the **Properties Toolbar** and select white:
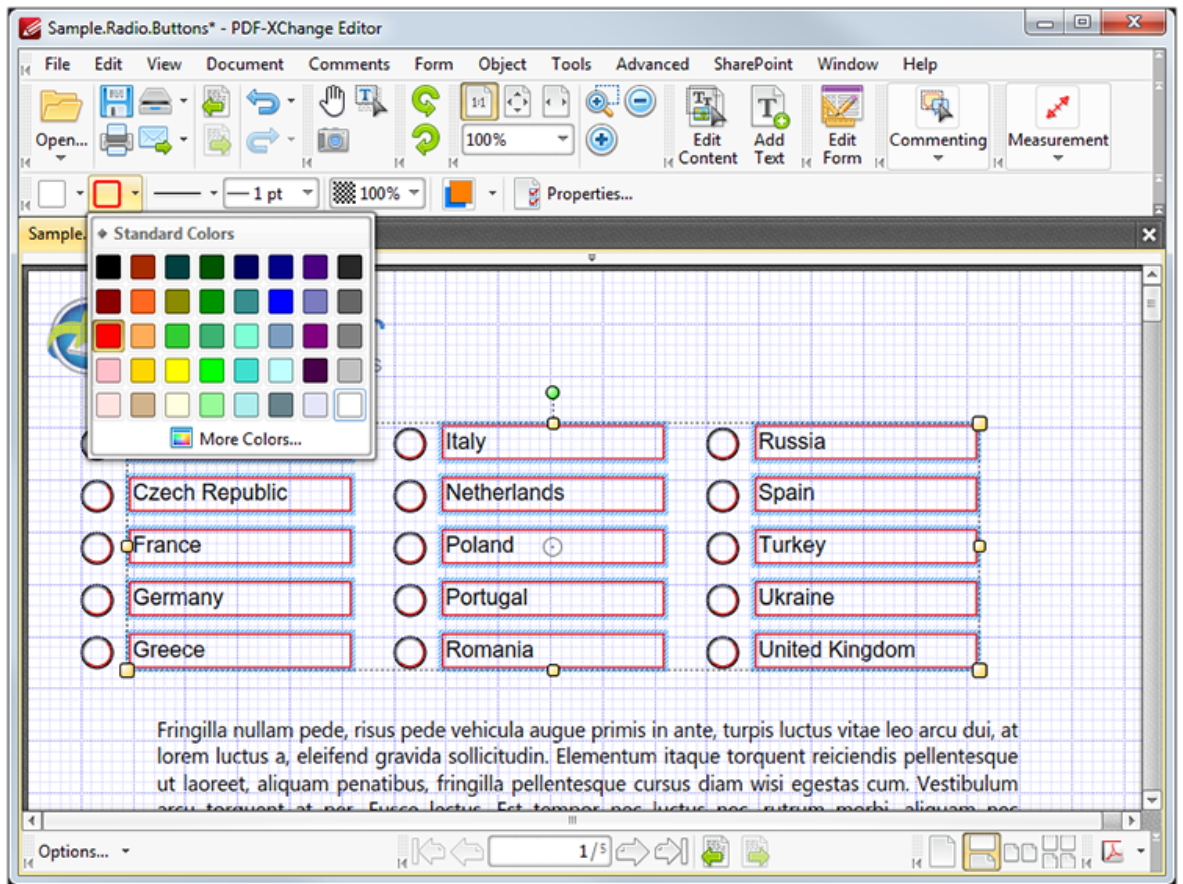
Figure 11. Properties Toolbar, Stroke Color

7. Press Ctrl+' to disable the grid. The radio button list is then complete. Click the **Hand Tool** to select an option as desired:
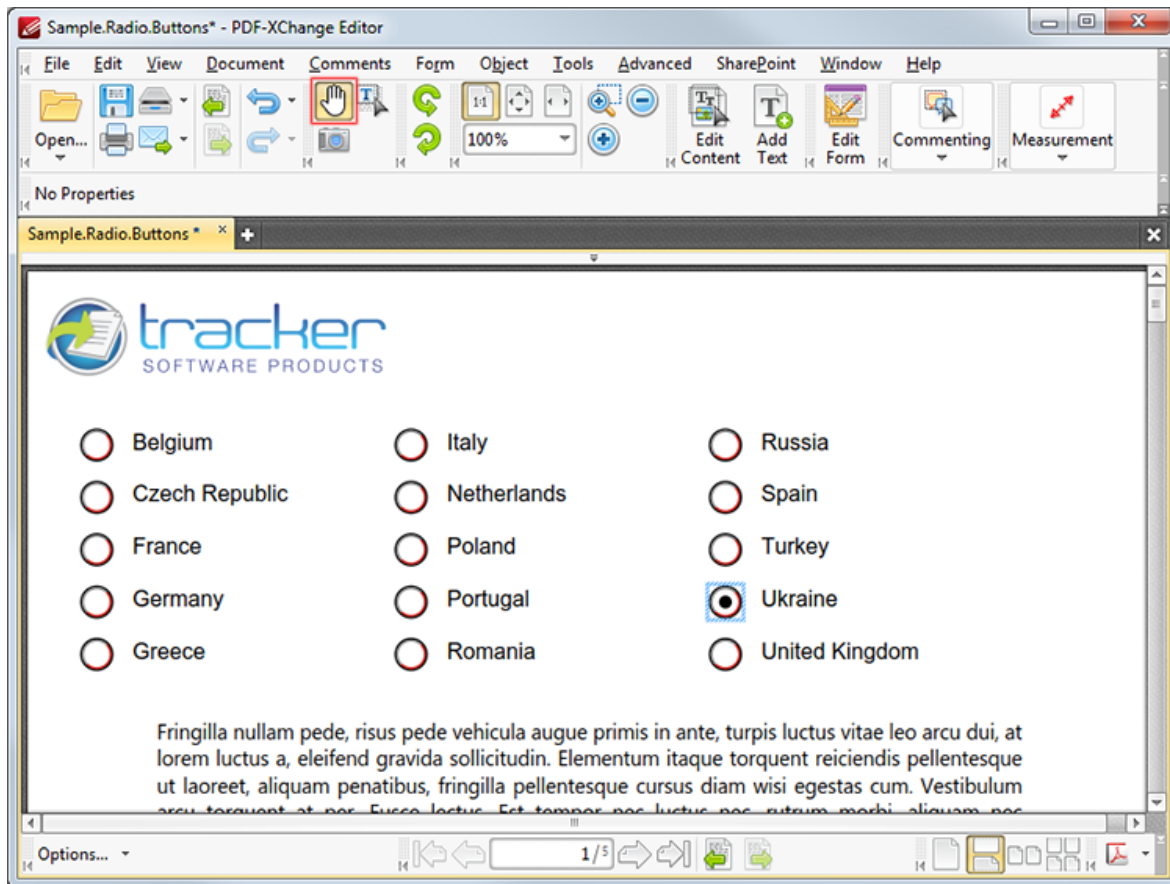
Figure 12. Completed Radio Button List

6.3.1.7.4 Add List Boxes to Documents

Add List Boxes to Documents

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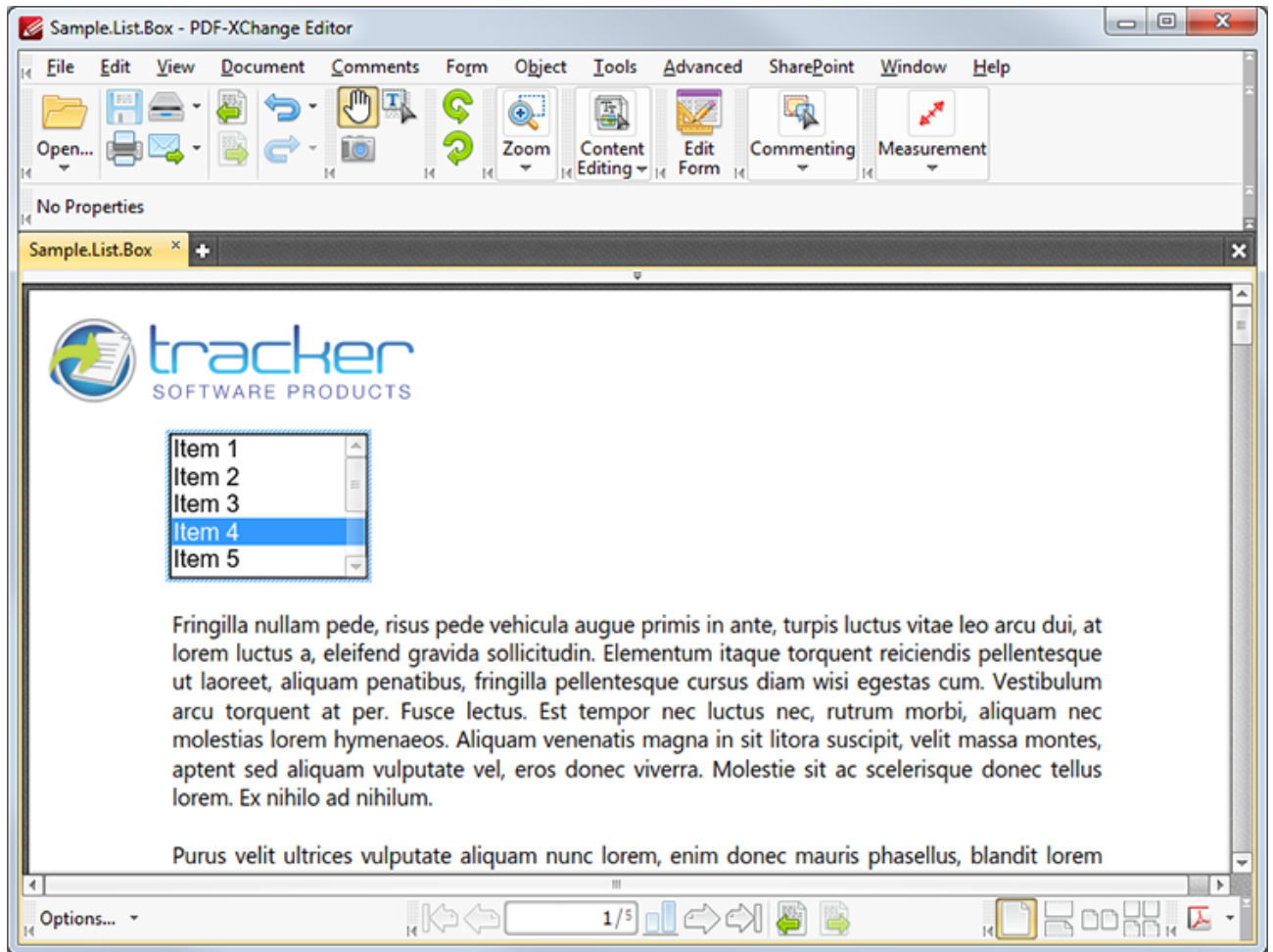
Figure 1. Example List Box

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:
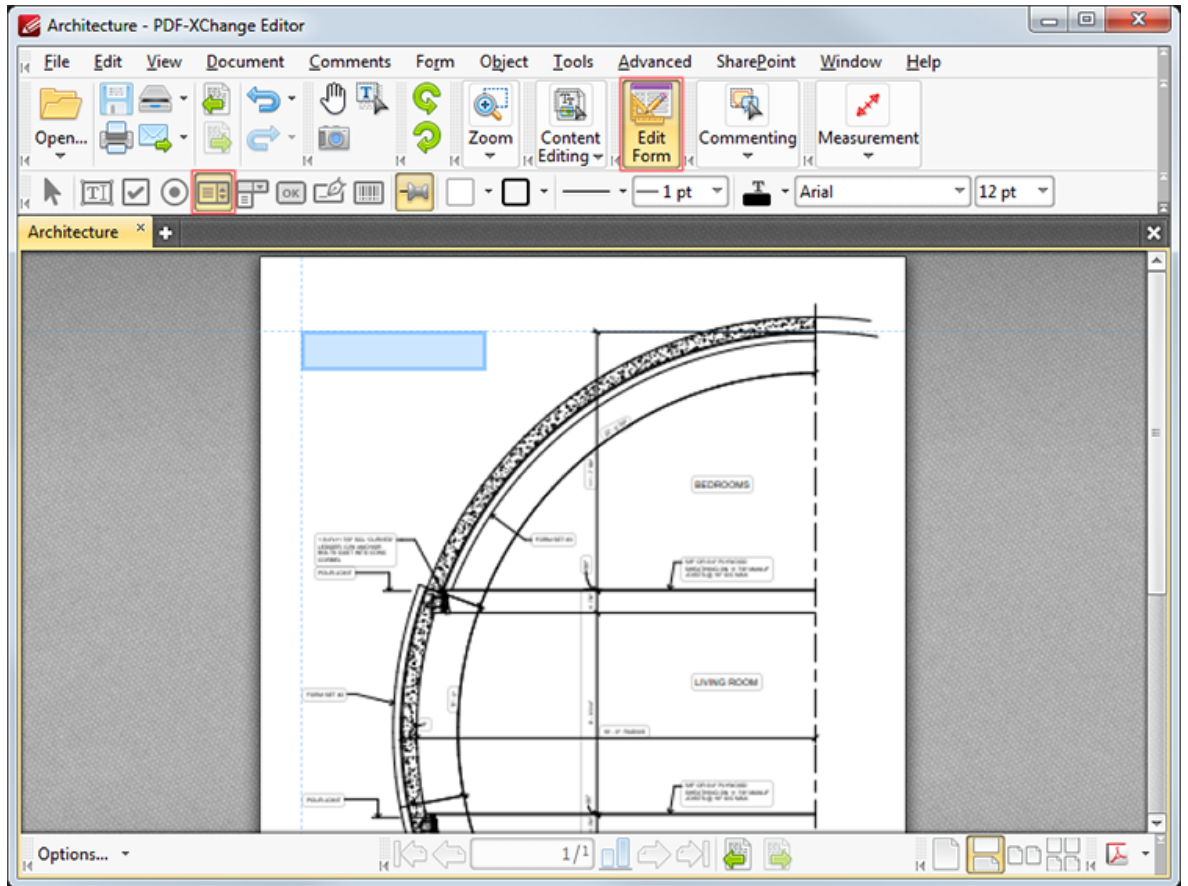
Figure 2. Active List Box Tool

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** 525 to assist in the precise placement of list boxes). Added list boxes appear as below:
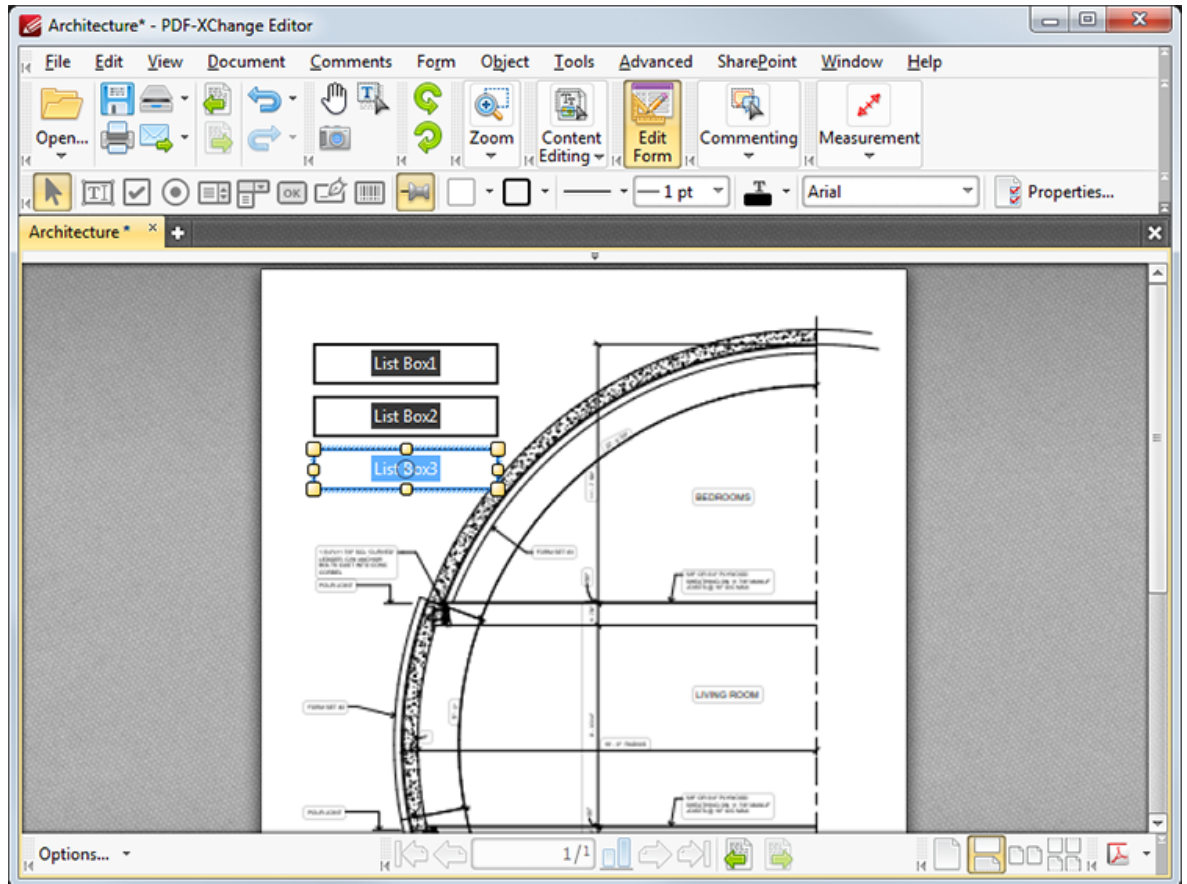
Figure 3. Added List Boxes

- Click and drag the yellow control points to resize list boxes.
- Use the options in the **Properties Toolbar** 484 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 **Widget Properties** pane, which enables the customization of additional elements of list boxes.

▼ **The Widget Properties Pane**
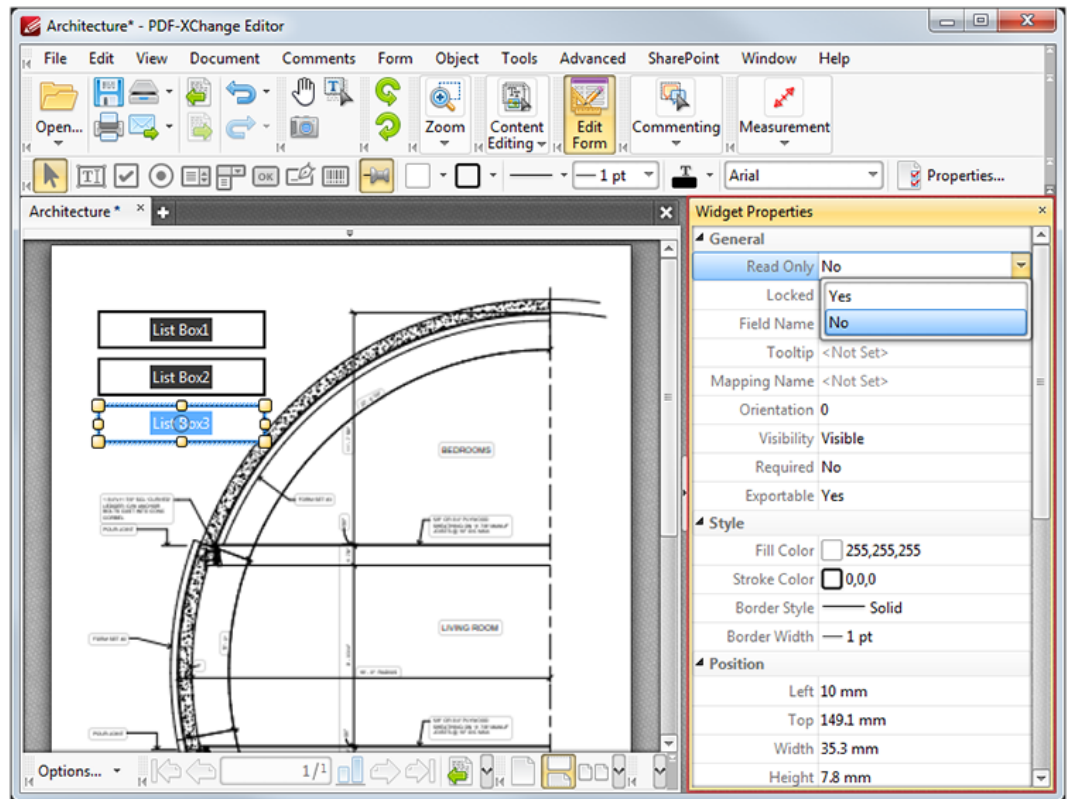
Figure 4. List Box Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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:**
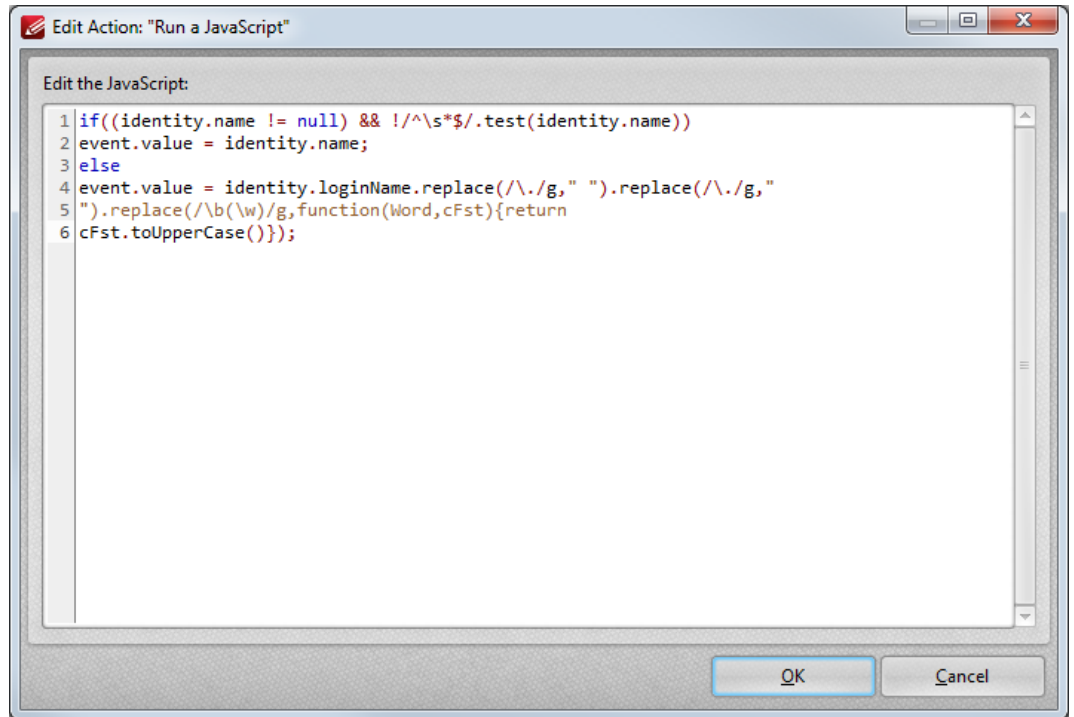
Figure 5. Edit Action: "Run a JavaScript" Dialog Box

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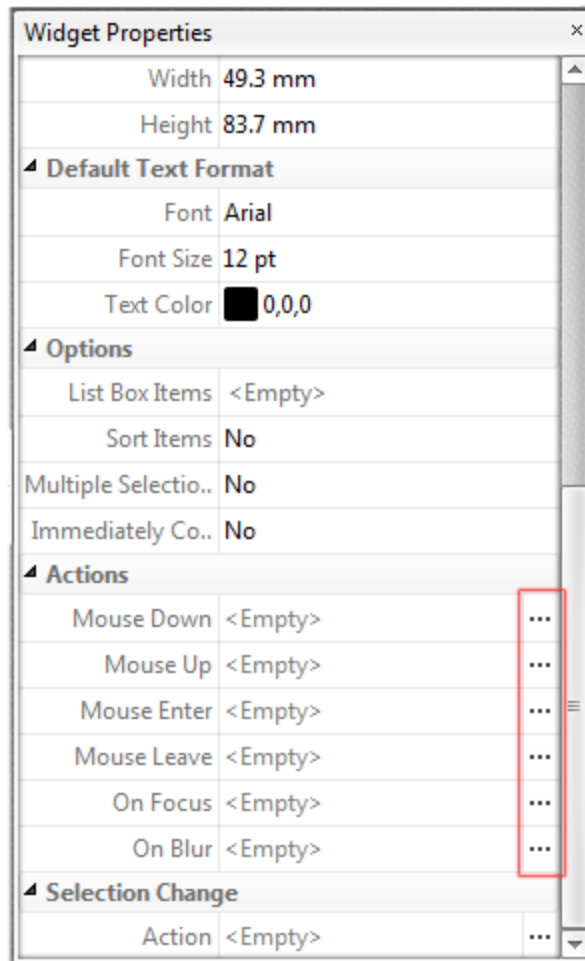
Figure 6. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** 738

▼ **Adding and Editing List Box Items**

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

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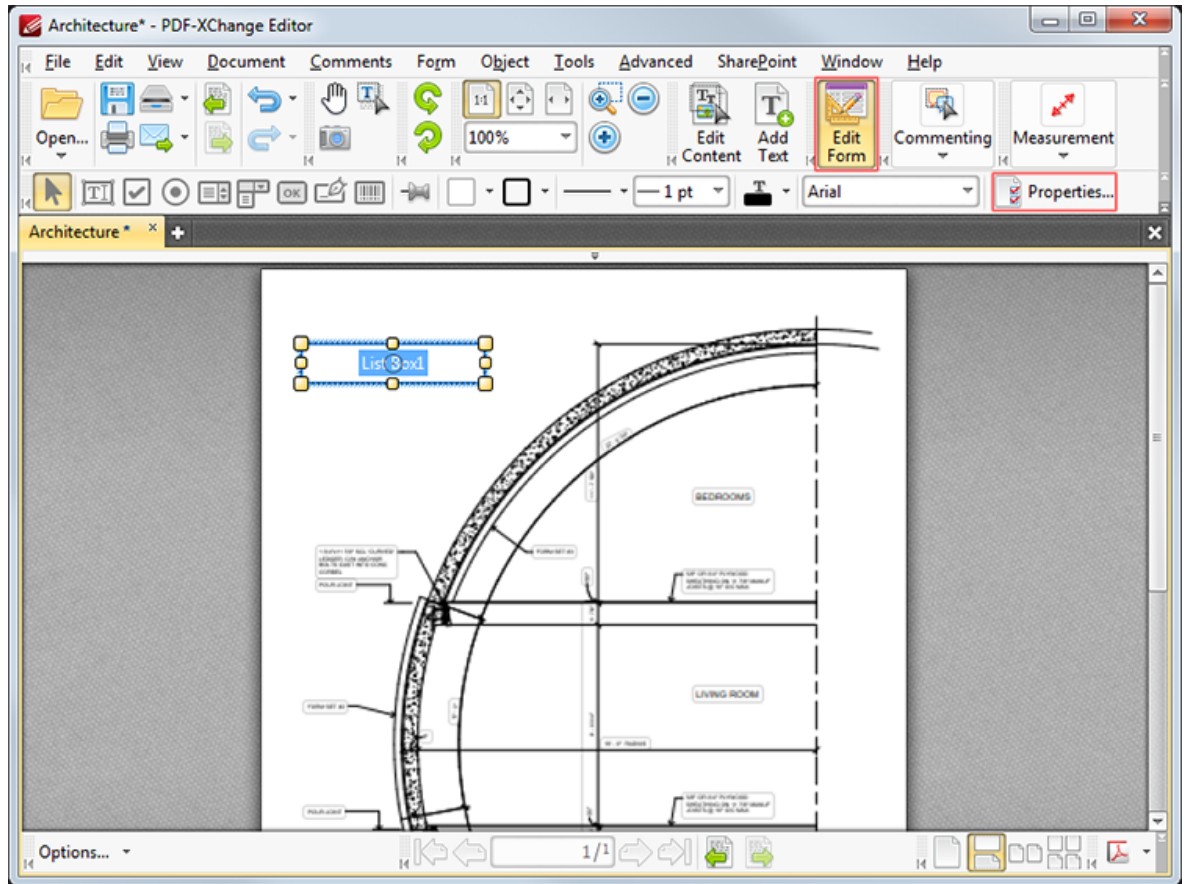
Figure 7. Selected List Box

The **Widget Properties** pane will open.

2. Scroll down to the **List Box Items** property and click **<Empty>:**
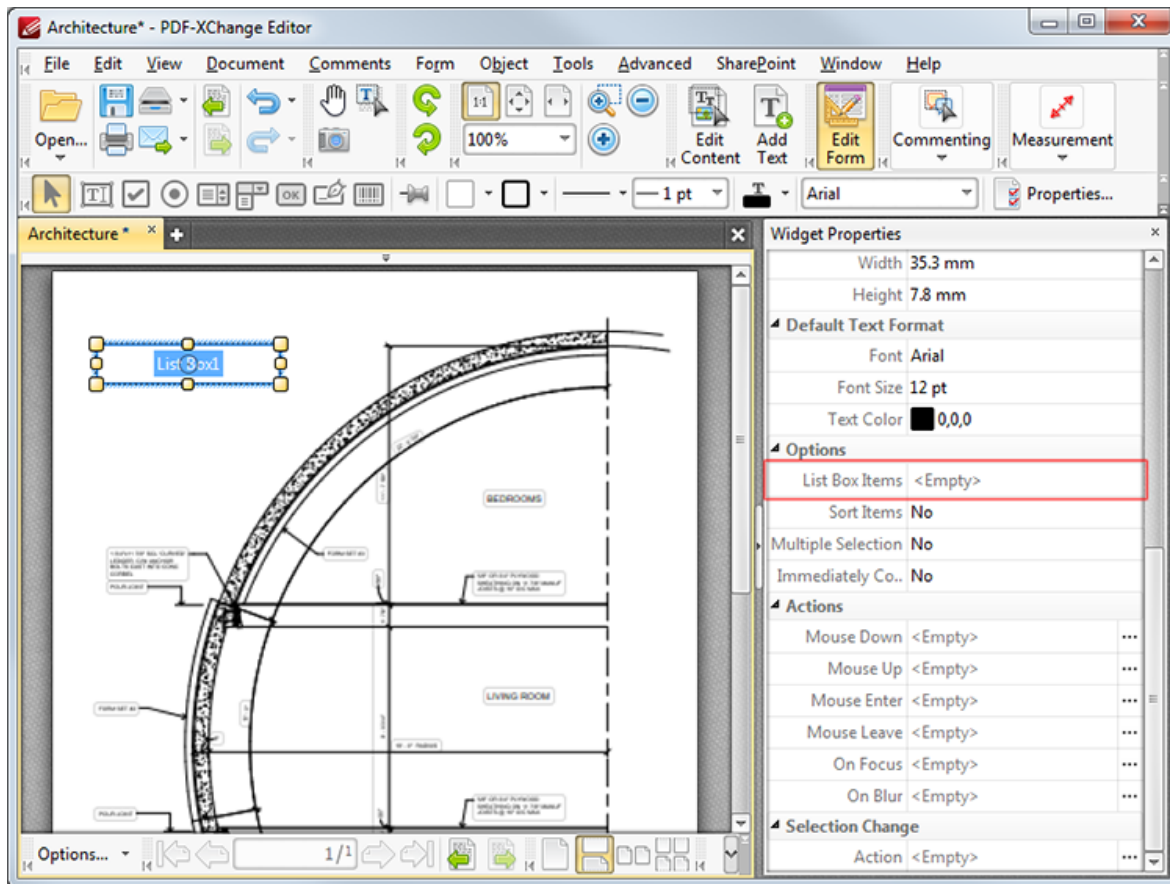
Figure 7. Widget Properties Pane, List Box Items Property

The **List Box** pane will open. This pane is used to add/edit list box items:
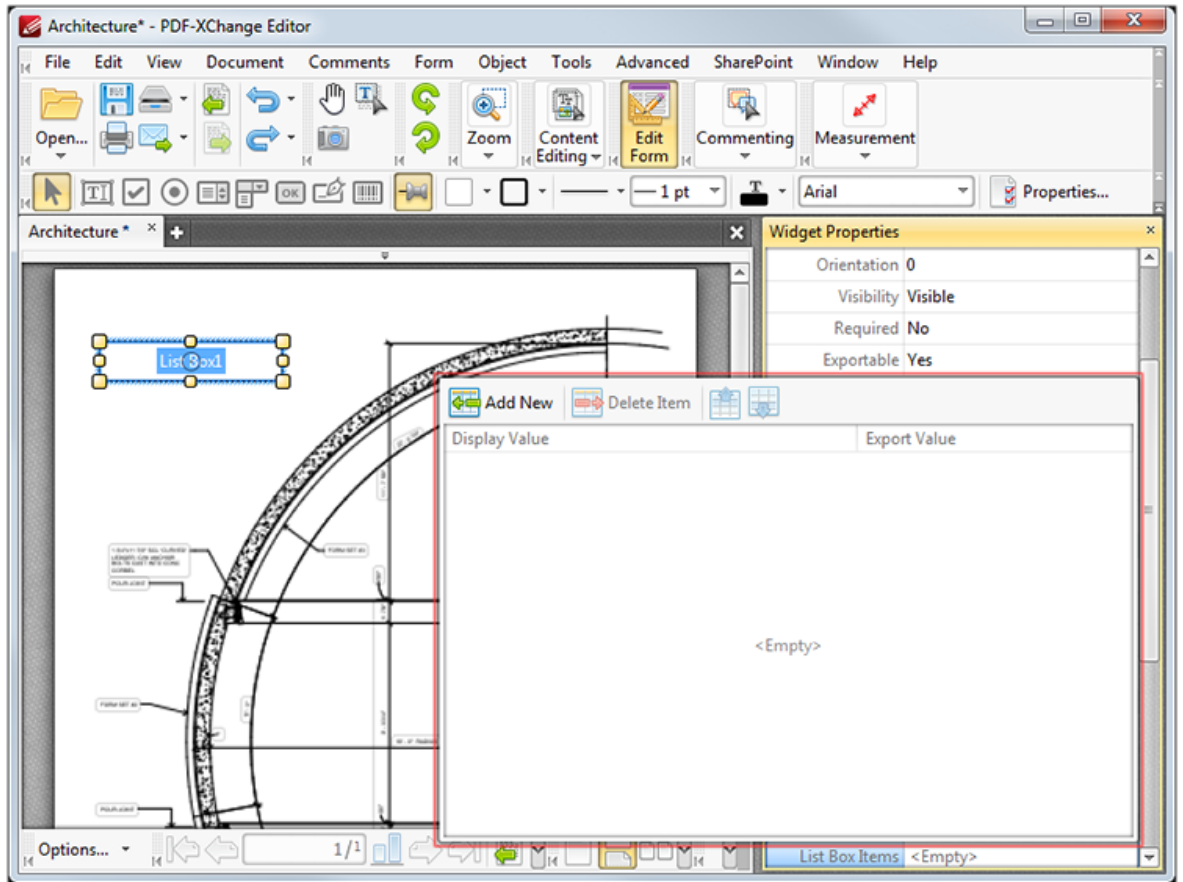
Figure 8. List Box Pane

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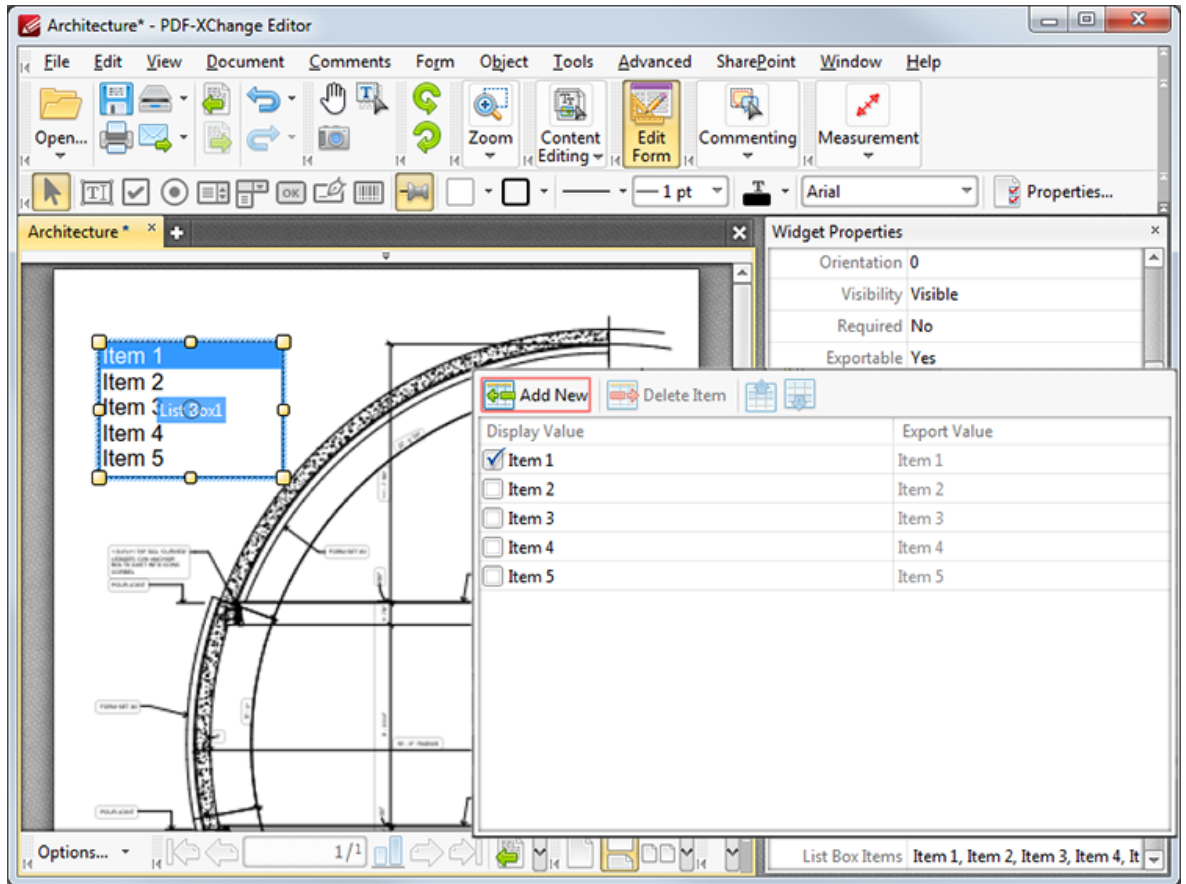
Figure 9. List Box Items Pane

- 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:
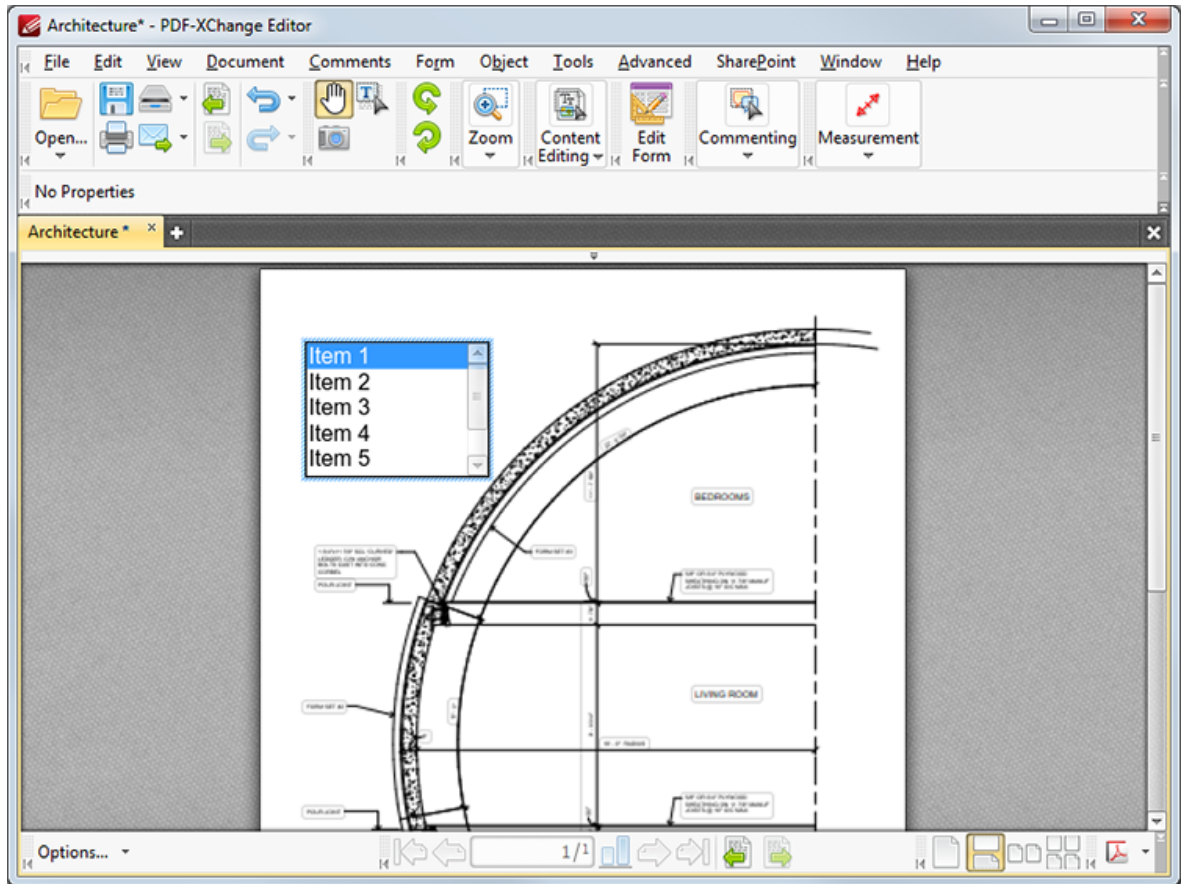
Figure 10. Completed List Box

6.3.1.7.5 Add Dropdown Menus to Documents

Add Dropdown Menus to Documents

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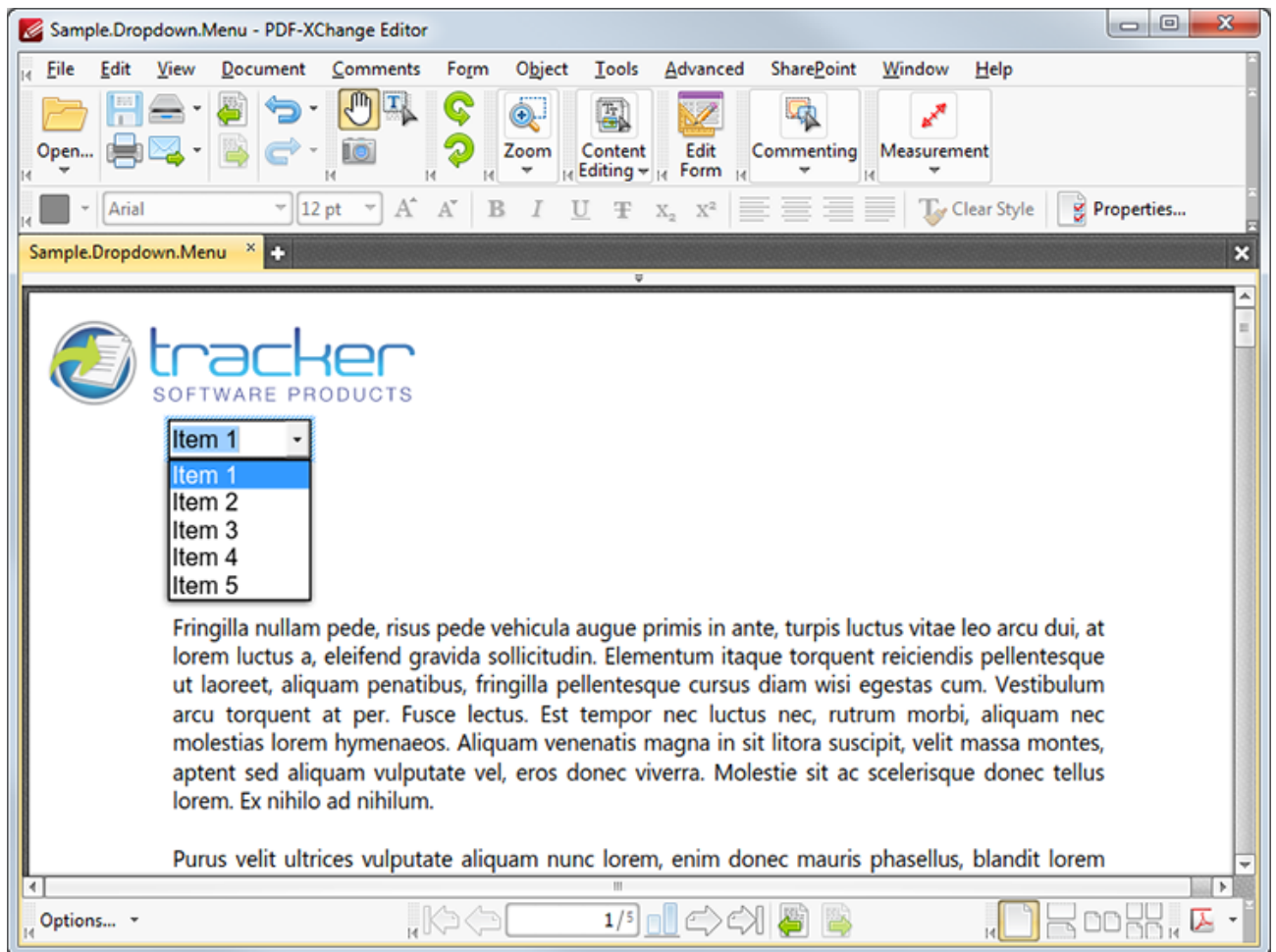
Figure 1. Example Dropdown Menu

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:
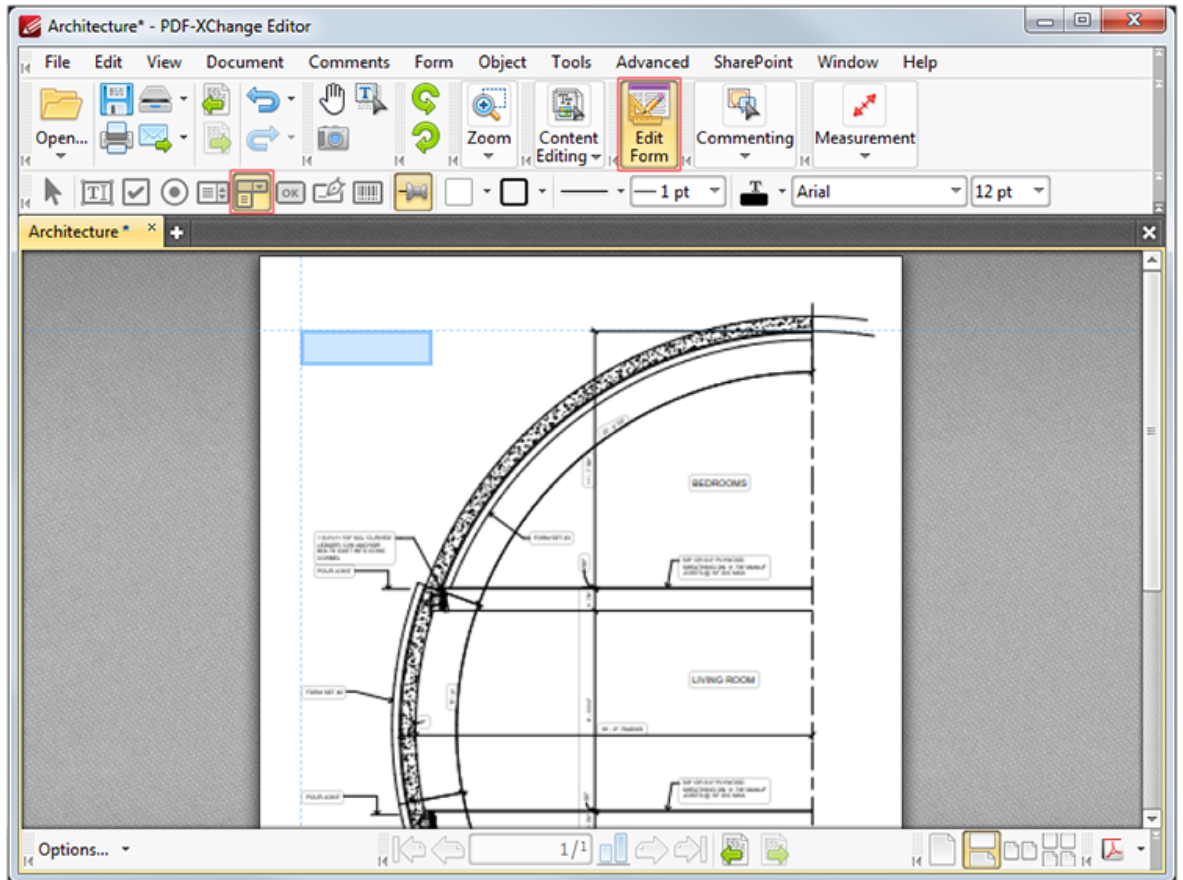
Figure 2. Active Dropdown Tool

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** 525 to assist in the precise placement of dropdown menus). Added dropdown menus appear as below:
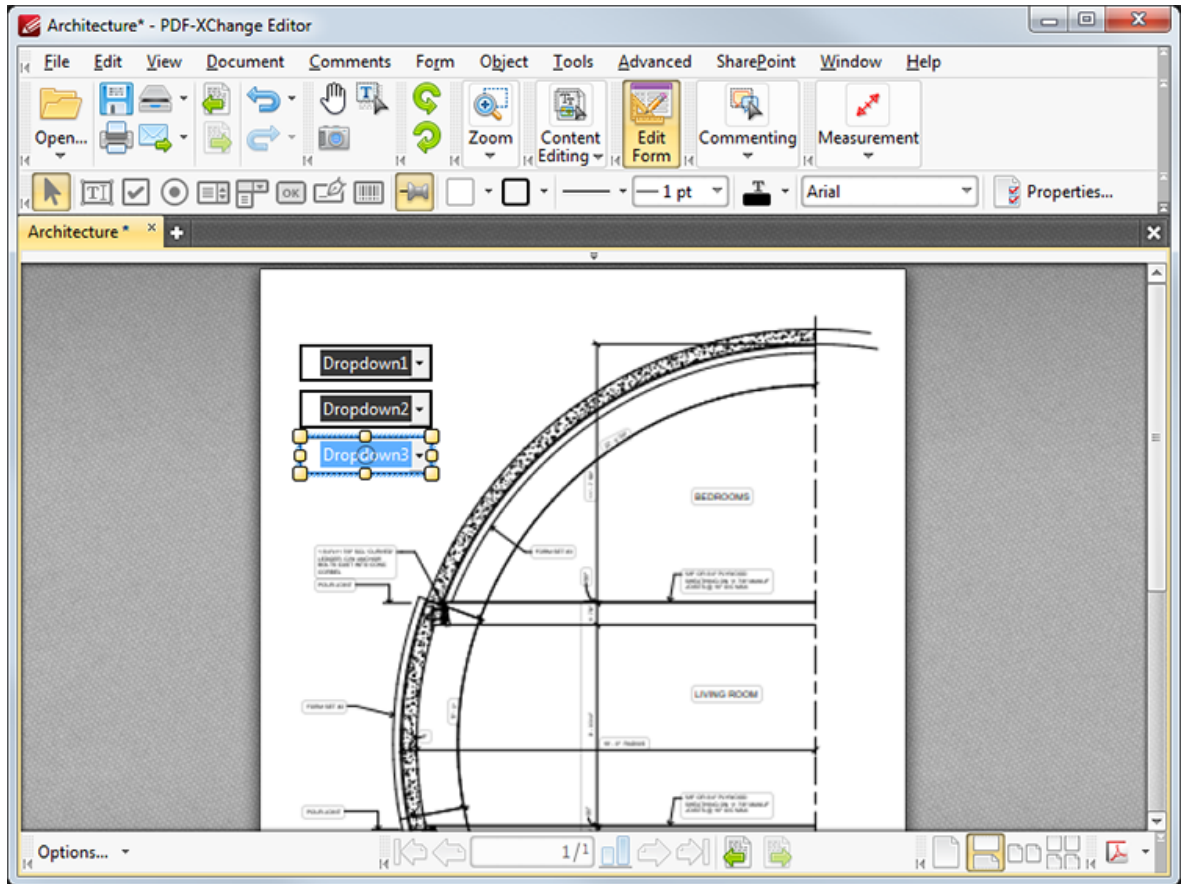
Figure 3. Added Dropdown Menus

- Click and drag the yellow control points to resize dropdown menus.
- Use the options in the **Properties Toolbar** 484 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 **Widget Properties** pane, which enables the customization of additional elements of dropdown menus.

  ▾ **The Widget Properties Pane**
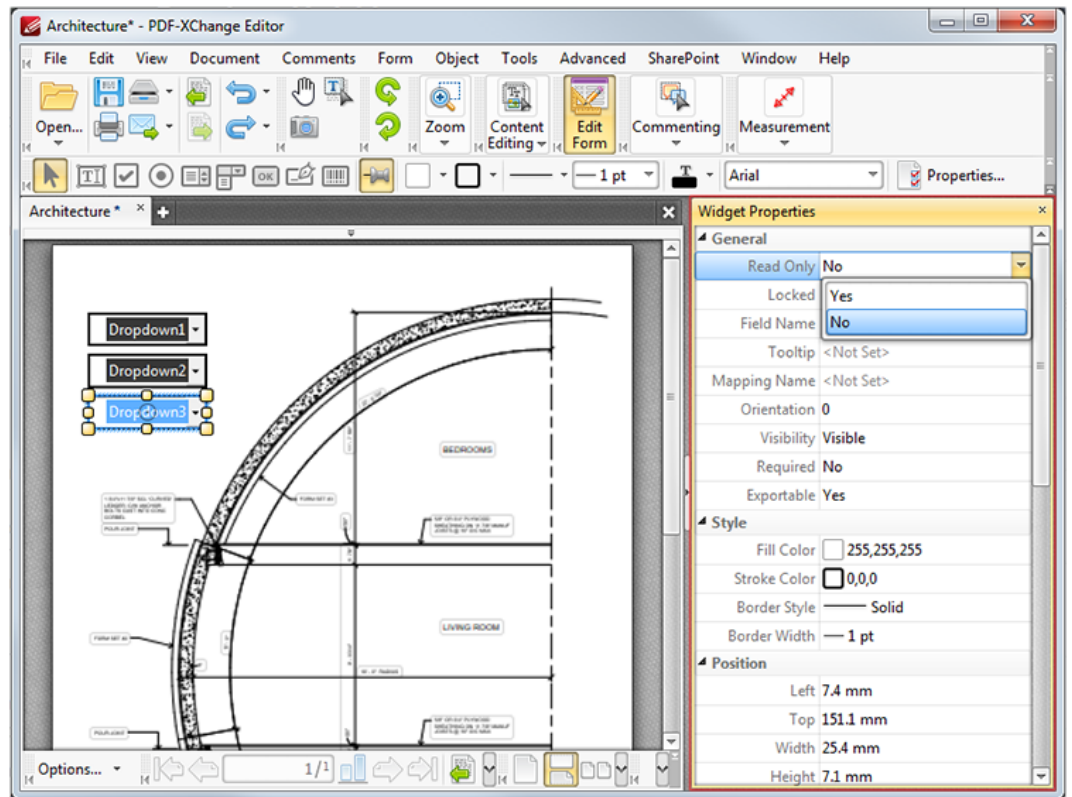
Figure 4. Dropdown Menu Tool, Widget Properties Pane

The **Widget 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.** [519]
- **Tooltip** determines the information displayed when the pointer it hovered over the dropdown menu.

- **Mapping Name** determines the mapping name that 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.

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:
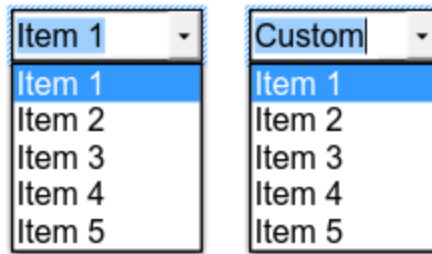
Figure 5. Standard Dropdown (left) and Allow Edit Dropdown (right)

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:
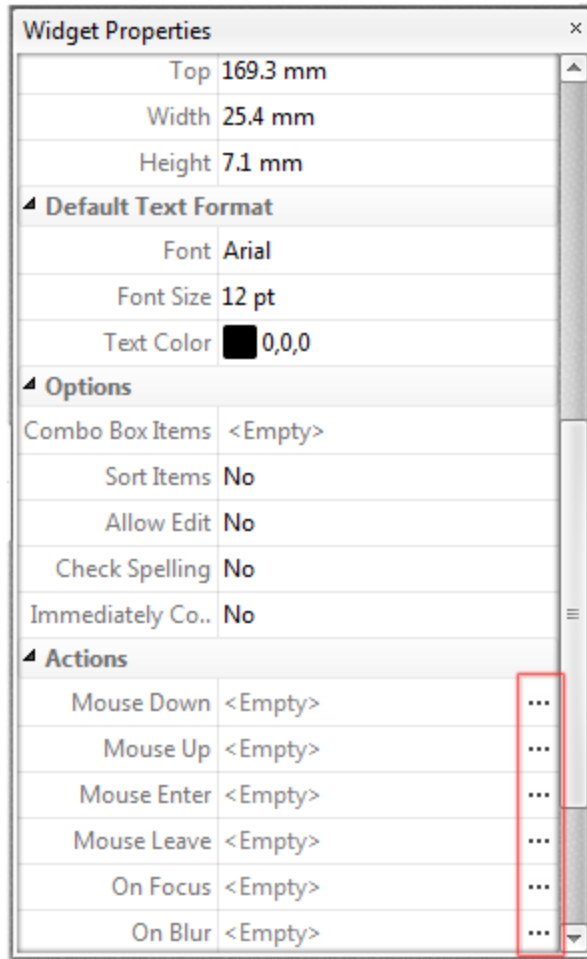
Figure 6. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** [738]

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 the manner in which 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.
- **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 select the dropdown menu and click **Properties** in the **Properties Toolbar:**
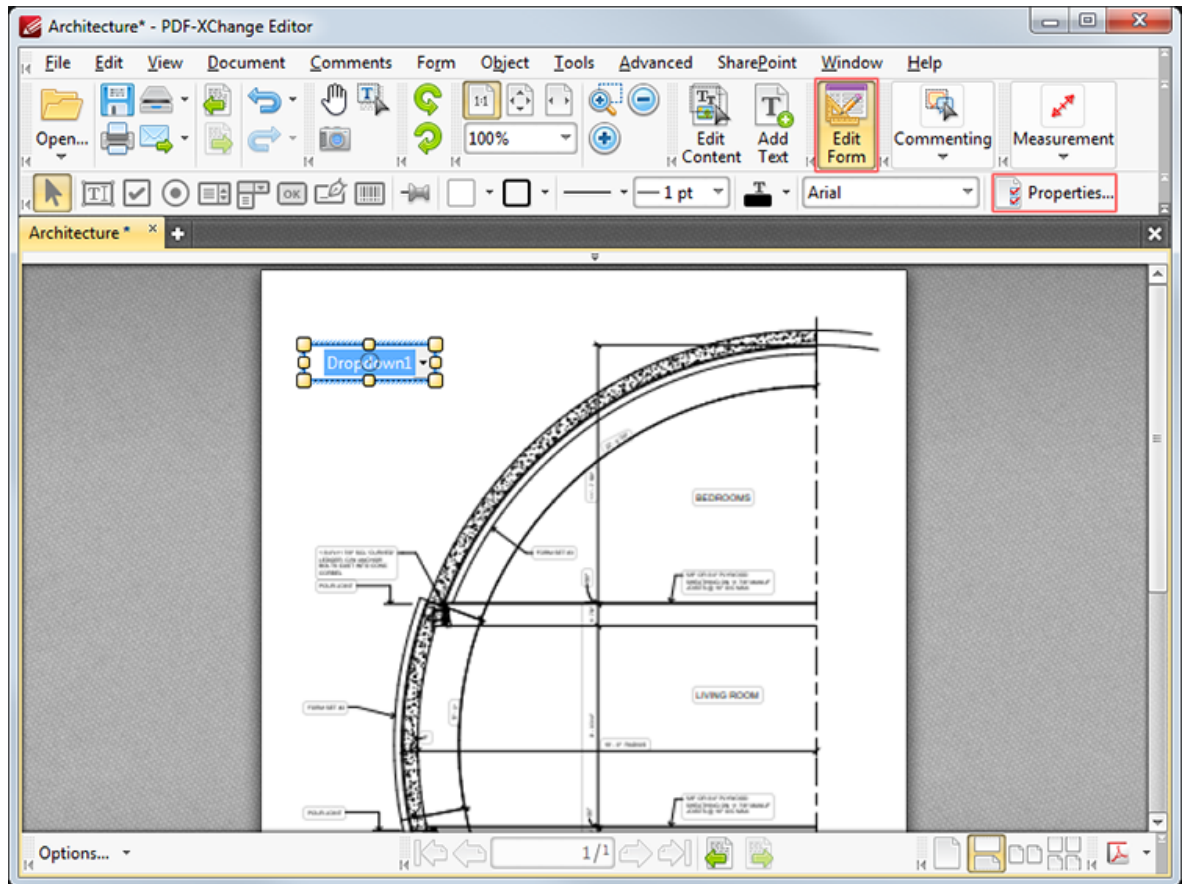
Figure 8. Selected Dropdown Menu

The **Widget Properties** pane will open.

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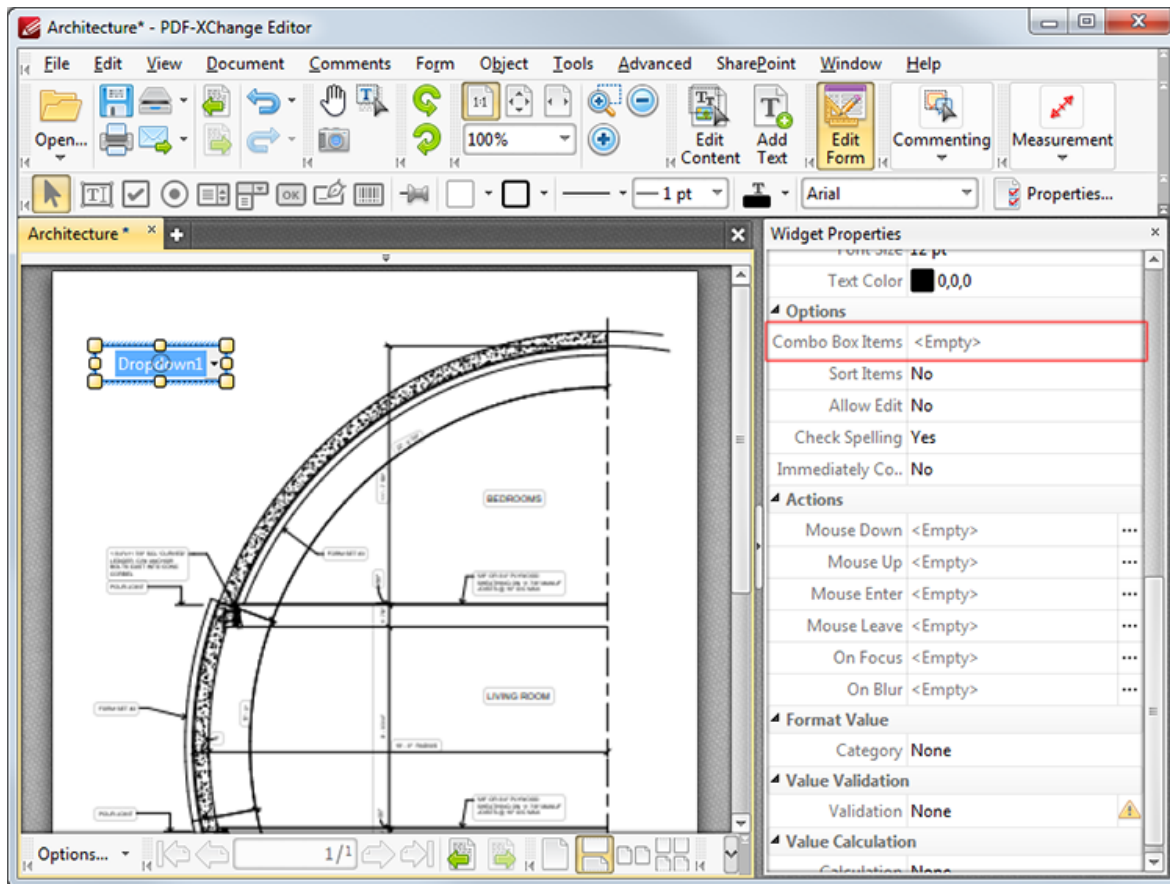
Figure 9. Widget Properties Pane, Combo Box Items

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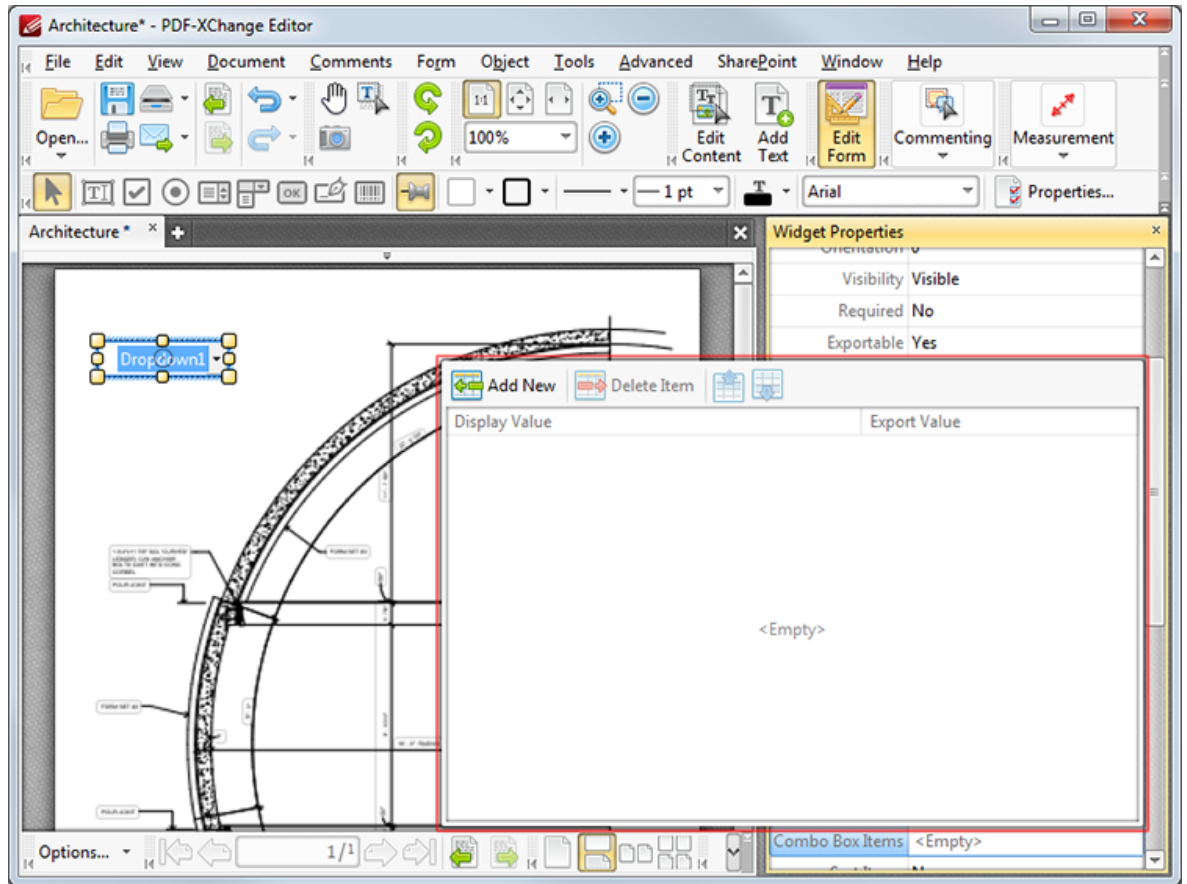
Figure 10. Dropdown Menu Pane

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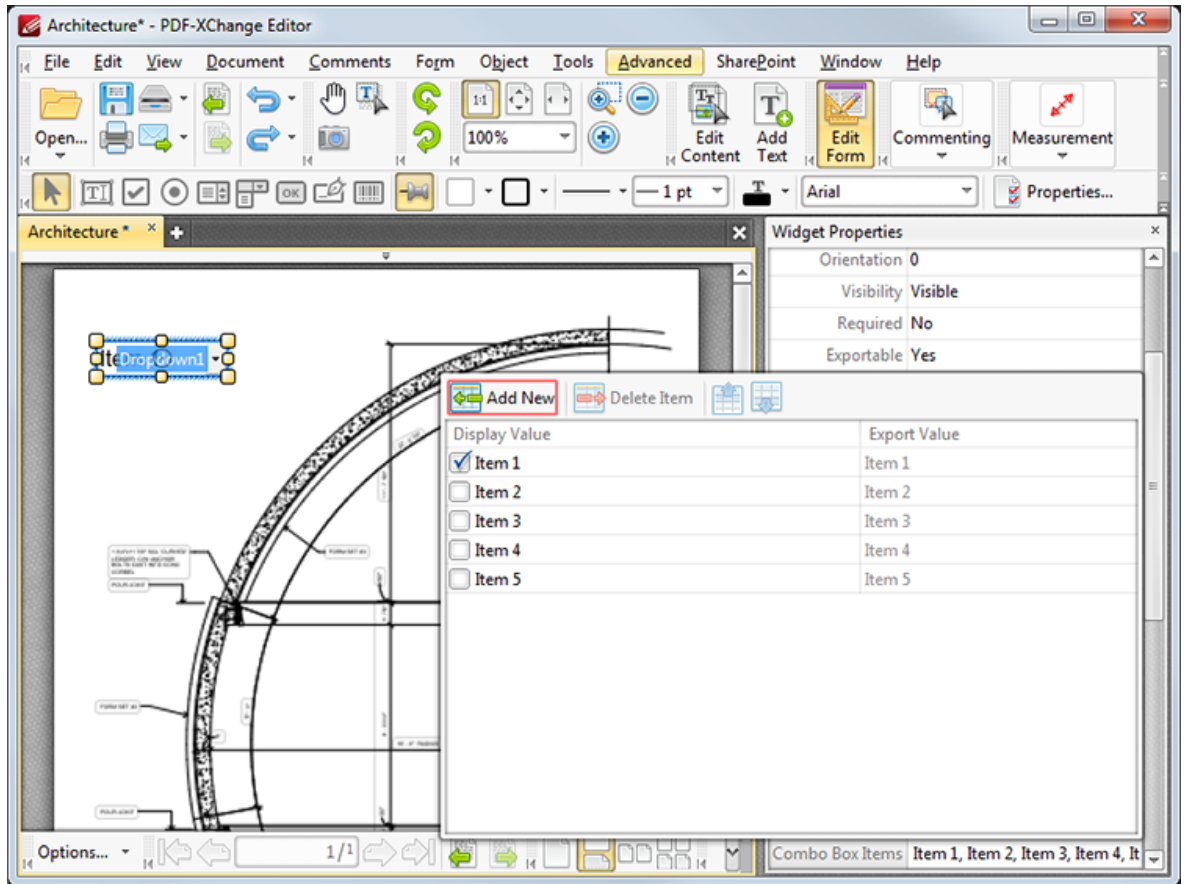
Figure 11. Dropdown Menu Items Pane

- 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:
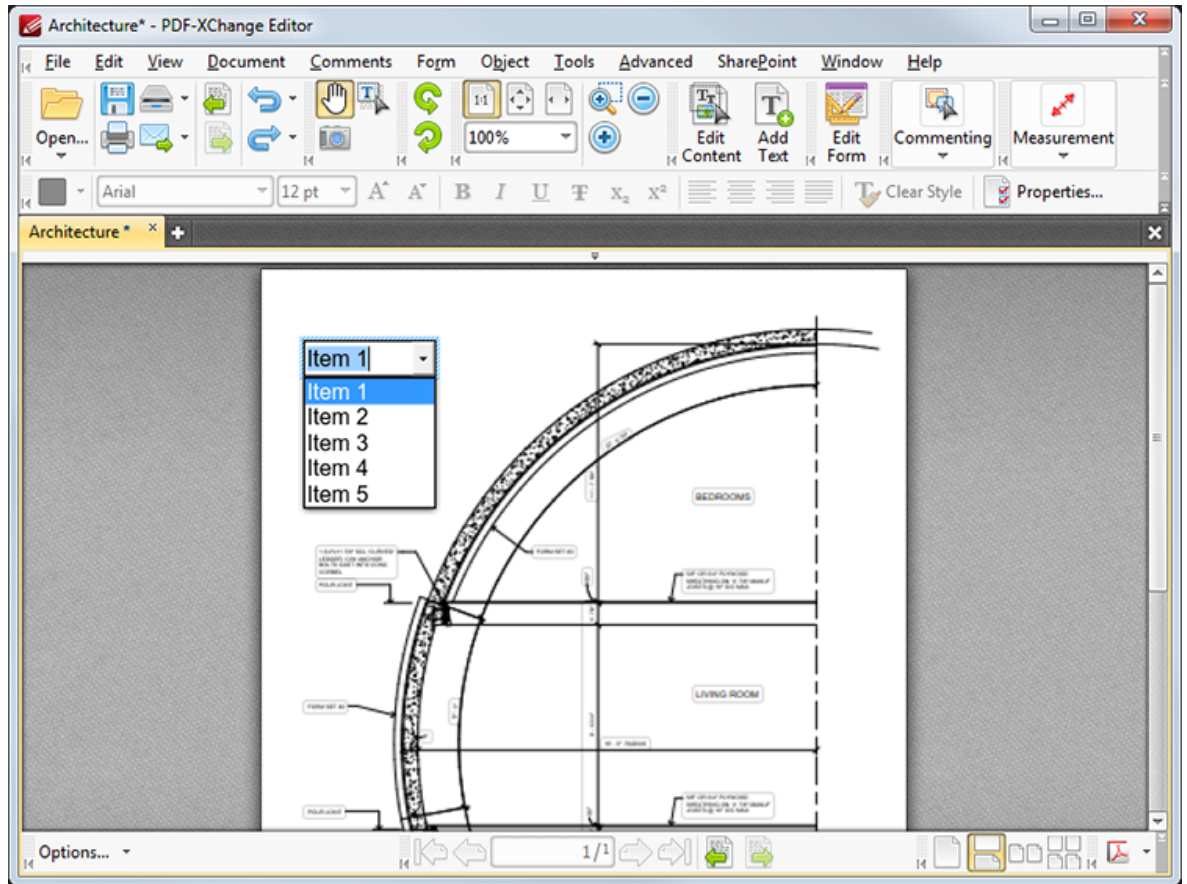
Figure 12. Completed Dropdown Menu

▼ **Value Calculation Example**

The following example details a simple value calculation. There are three dropdown menus: **'Dropdown1', 'Dropdown2'** and **'Dropdown3'**:
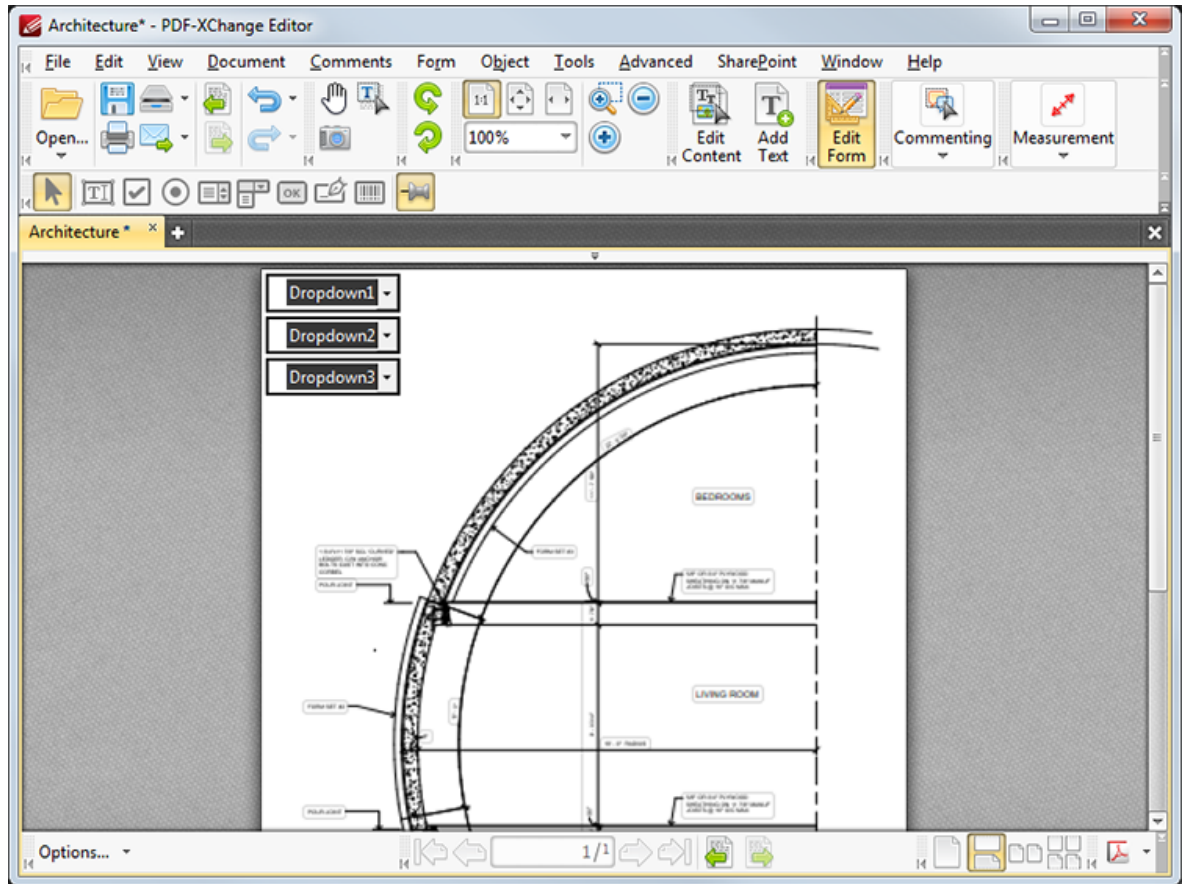
Figure 13. Value Calculation Example, Dropdown Menus

This example will detail how to use the product of the values entered in **'Dropdown1'** and **'Dropdown2'** to create the value for **'Dropdown3'**:

1. Click **Edit Form,** then select **'Dropdown3'** and click **Properties** in the **Properties Toolbar.** The **Widget Properties** pane will open:

Figure 14. Value Calculation Example, Widget Properties Pane

2. Scroll down the **Widget Properties** pane to the **Value Calculation** tab, then click the **Calculation** property and select **Product:**
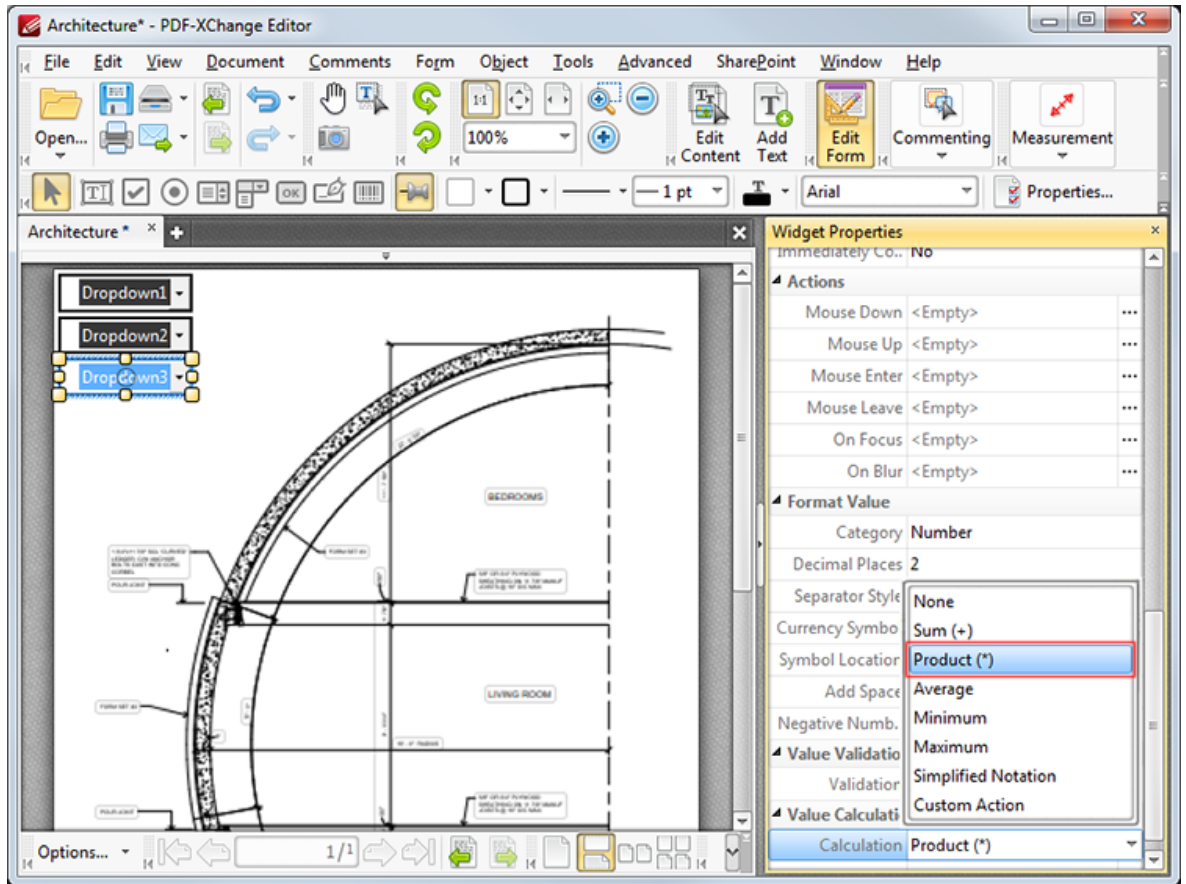
Figure 15. Value Calculation Example, Calculation Option

Note that the **Fields** option will appear beneath the **Calculation** option in the **Value Calculation** tab, 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 **'Dropdown3'.**

3. Click the ellipsis icon on the right of the **Fields** option. The **Fields Selection** dialog box will open. Select **'Dropdown1'** and **'Dropdown2',** then click **OK:**
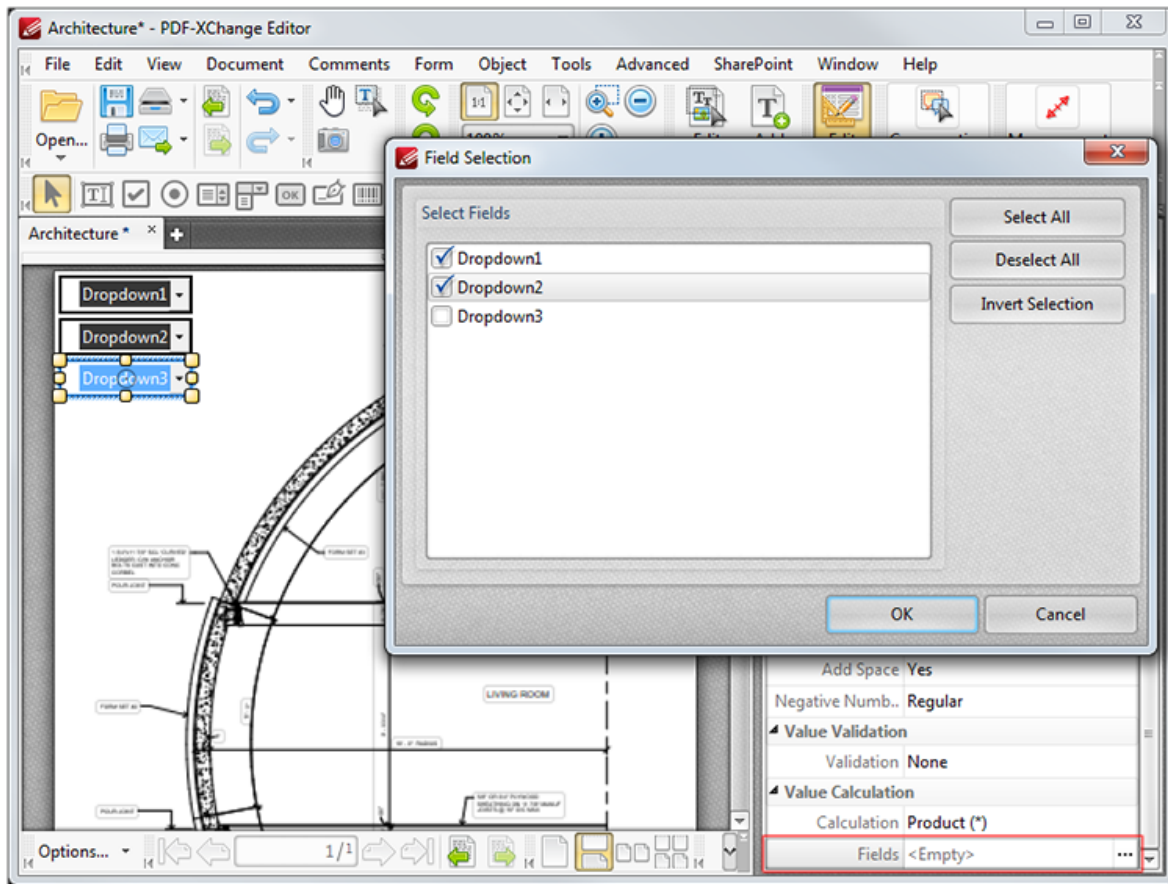
Figure 16. Value Calculation Example, Field Selection Dialog Box

The value of **'Dropdown3'** will then be the product of the values entered in **'Dropdown1'** and **'Dropdown2':**
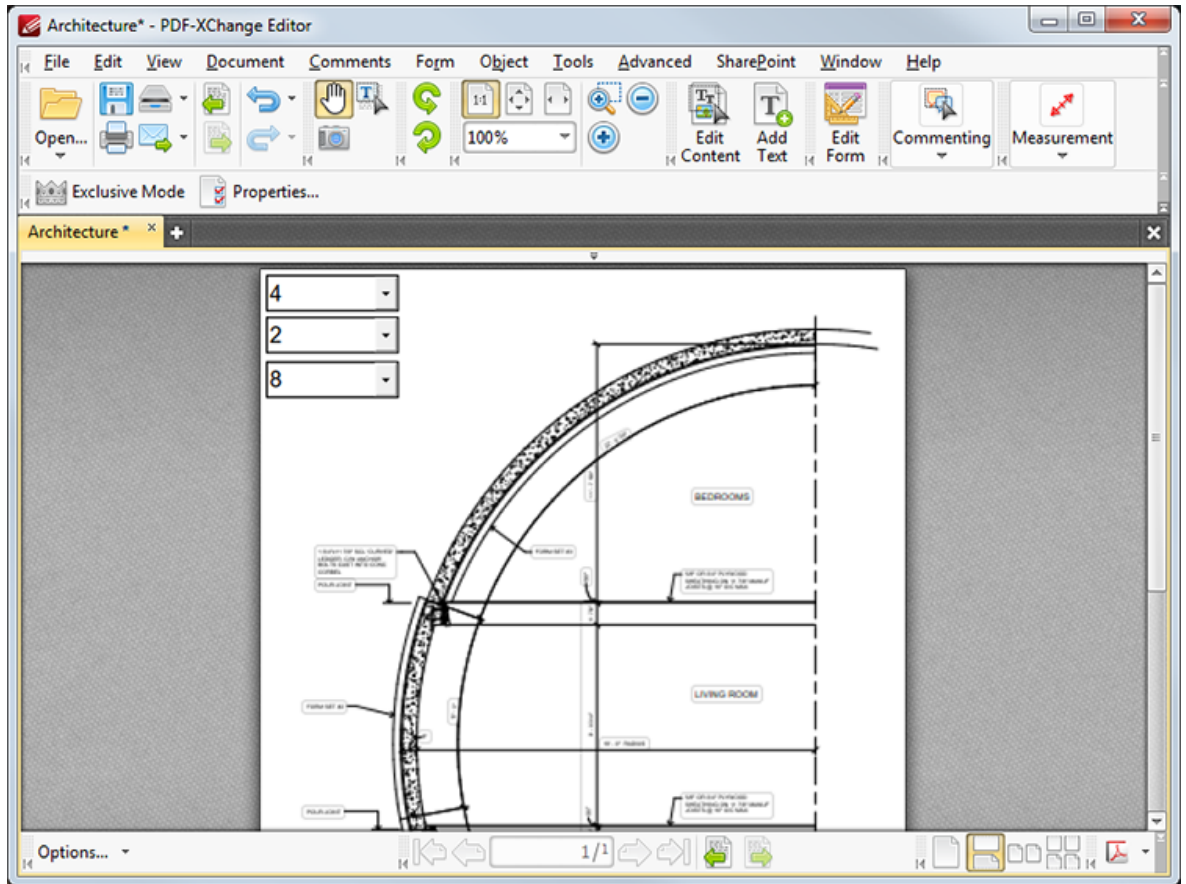
Figure 17. Value Calculation Example, Process Complete

If the values in **'Dropdown1'** and **'Dropdown2'** are subsequently changed, then the value in 'Dropdown3' will update.

Please note that the **Set Field Calculation Order** setting in the **Fields Pane** [519] 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 have value calculation settings. Follow the steps below to determine the order of calculation:

> 1. Click **Edit Form** (highlighted in the image below), then click **View** in the **Menu Toolbar,** hover over **Other Panes** and click **Fields:**
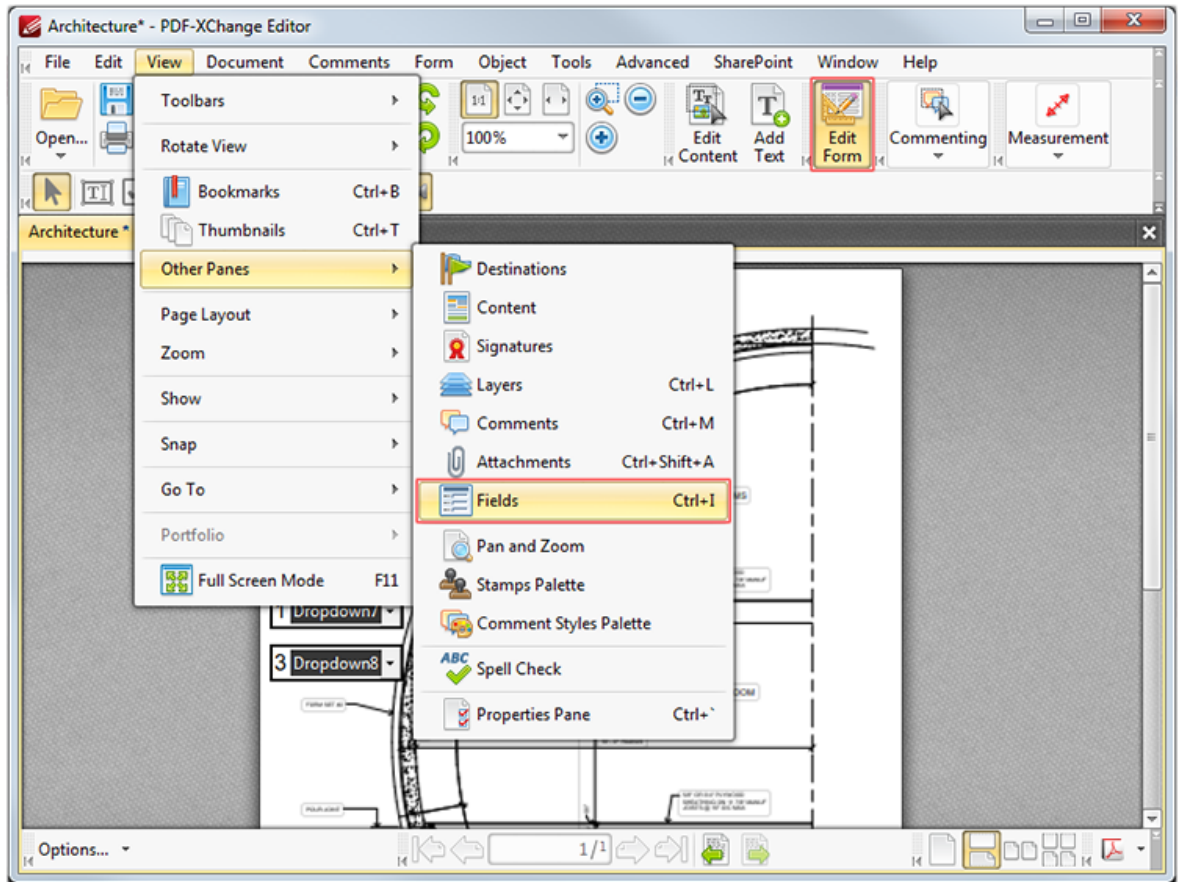
Figure 18. View Submenu, Other Panes, Fields

The **Fields** pane will open.

2. Click **Options** and then click **Set Field Calculation Order** in the submenu:
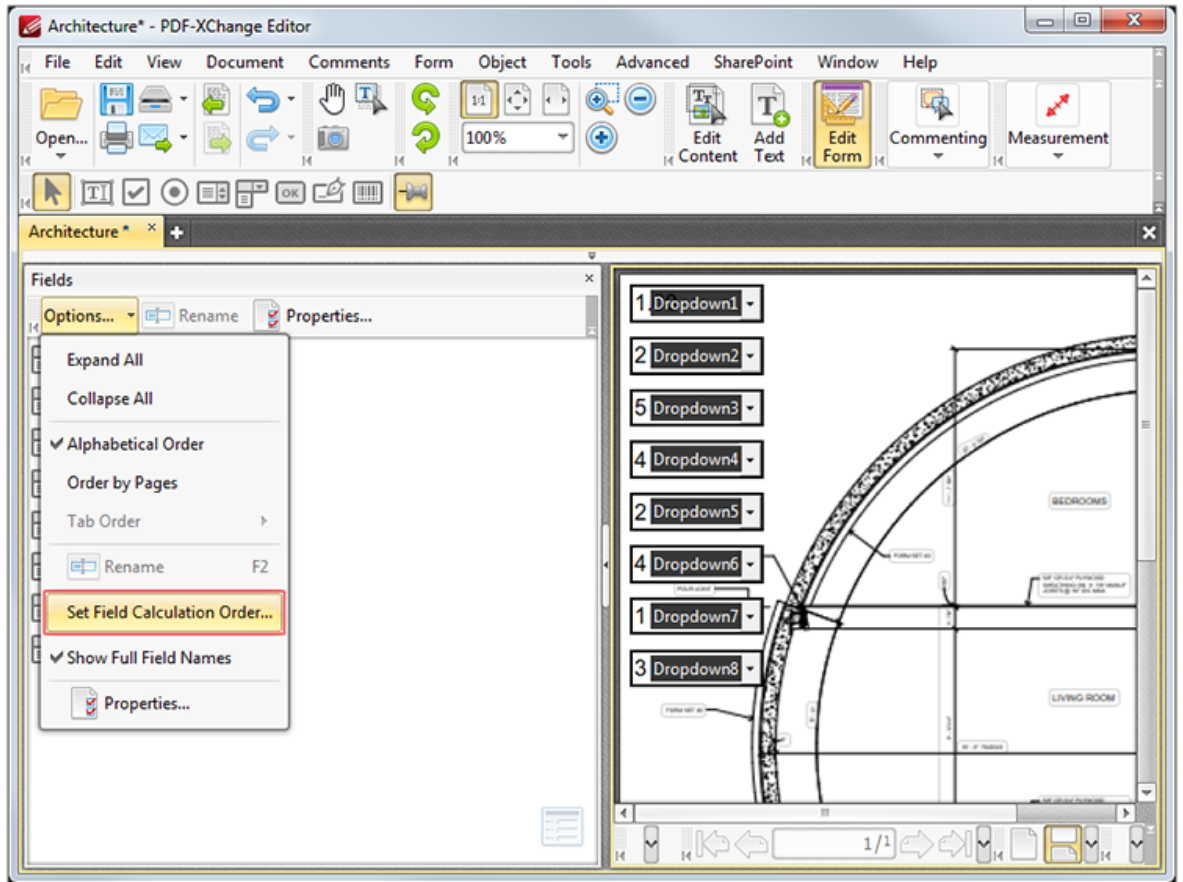
Figure 19. Fields Pane, Set Field Calculation Order

The **Calculation Order** dialog box will open:
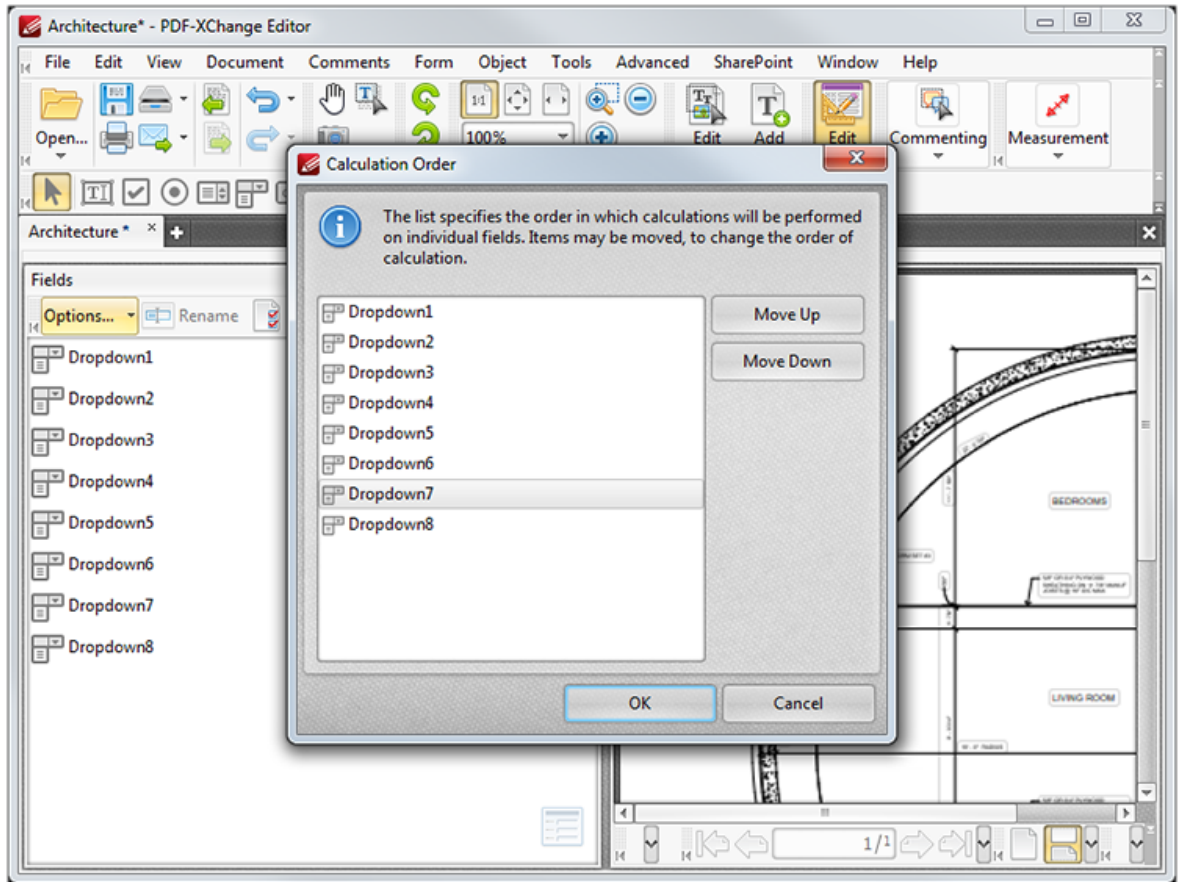
Figure 20. Calculation Order Dialog Box

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.

▼ **Value Validation Example**

The following example details a simple value validation of values entered into the dropdown **'Dropdown1':**
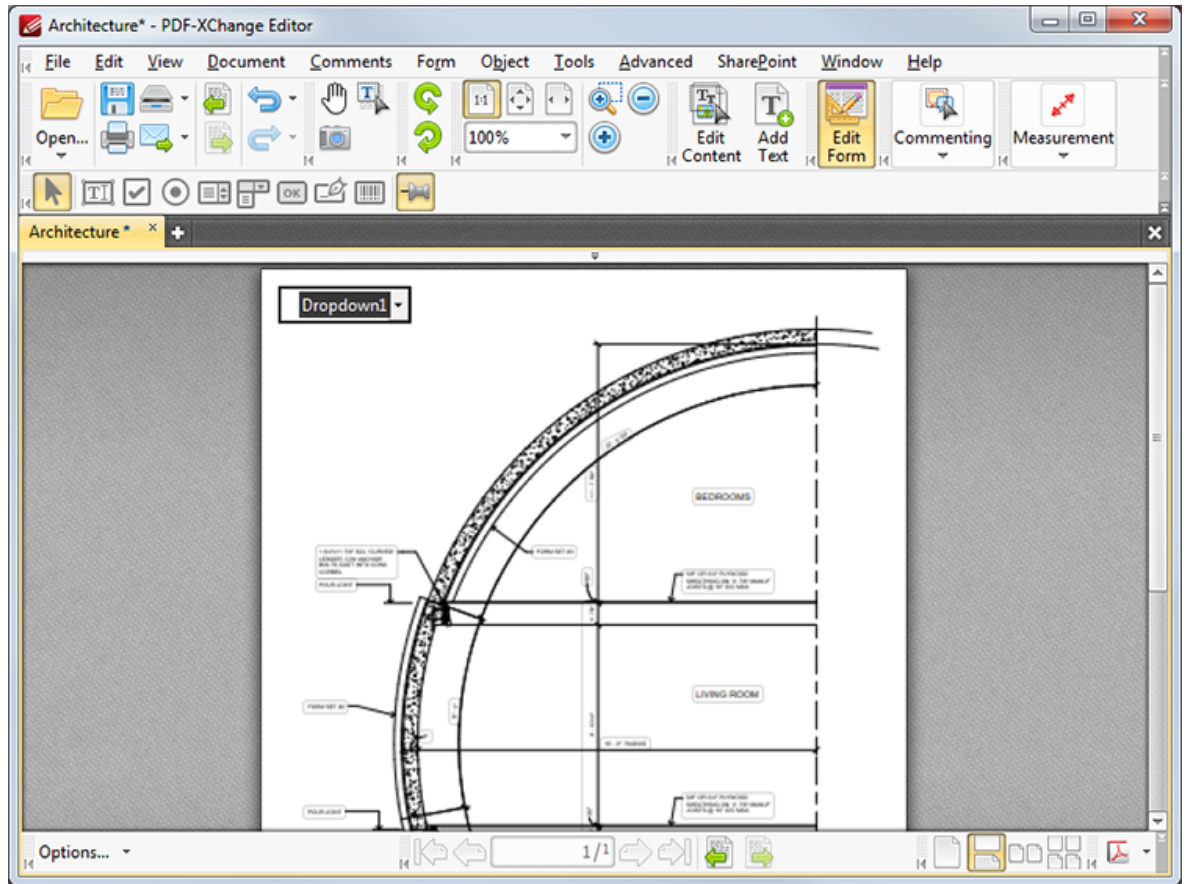
Figure 21. Value Validation Example, Dropdown Menu

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 **Widget Properties** pane will open:
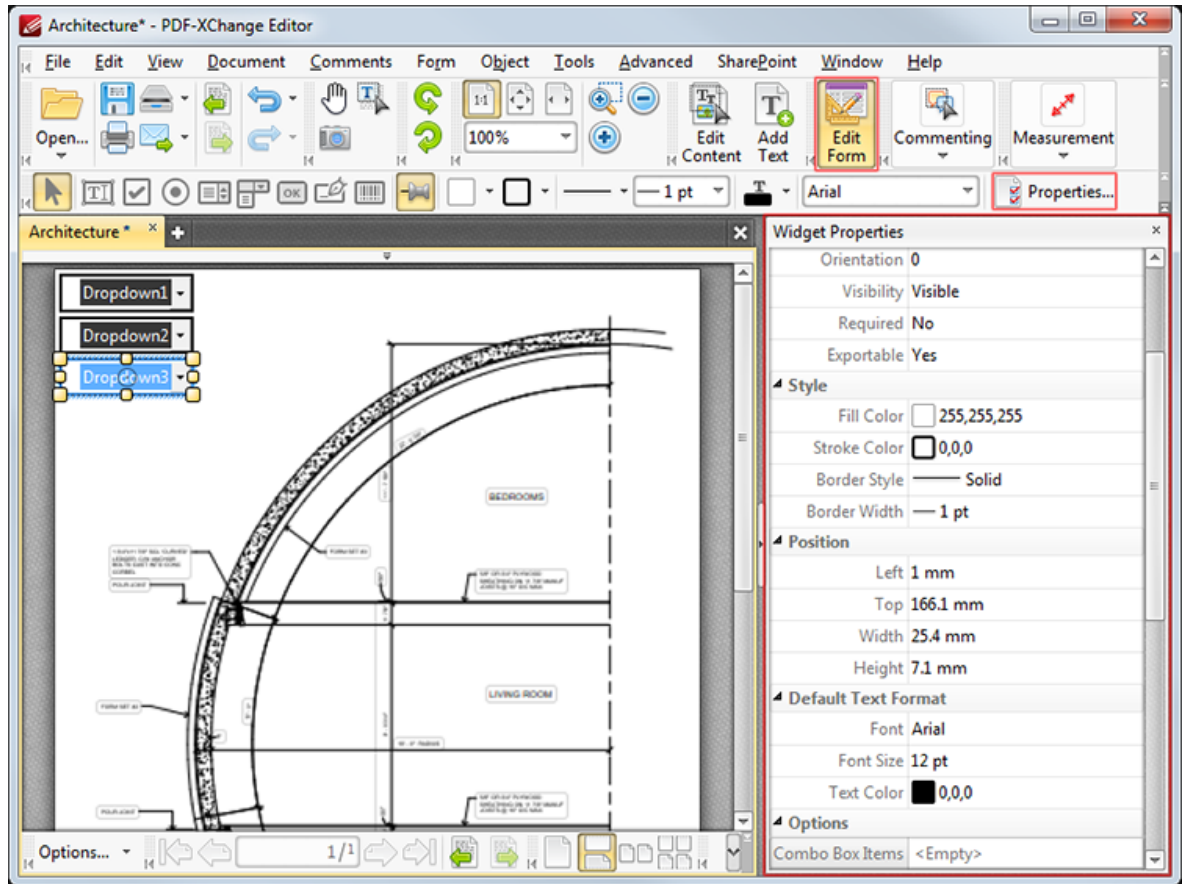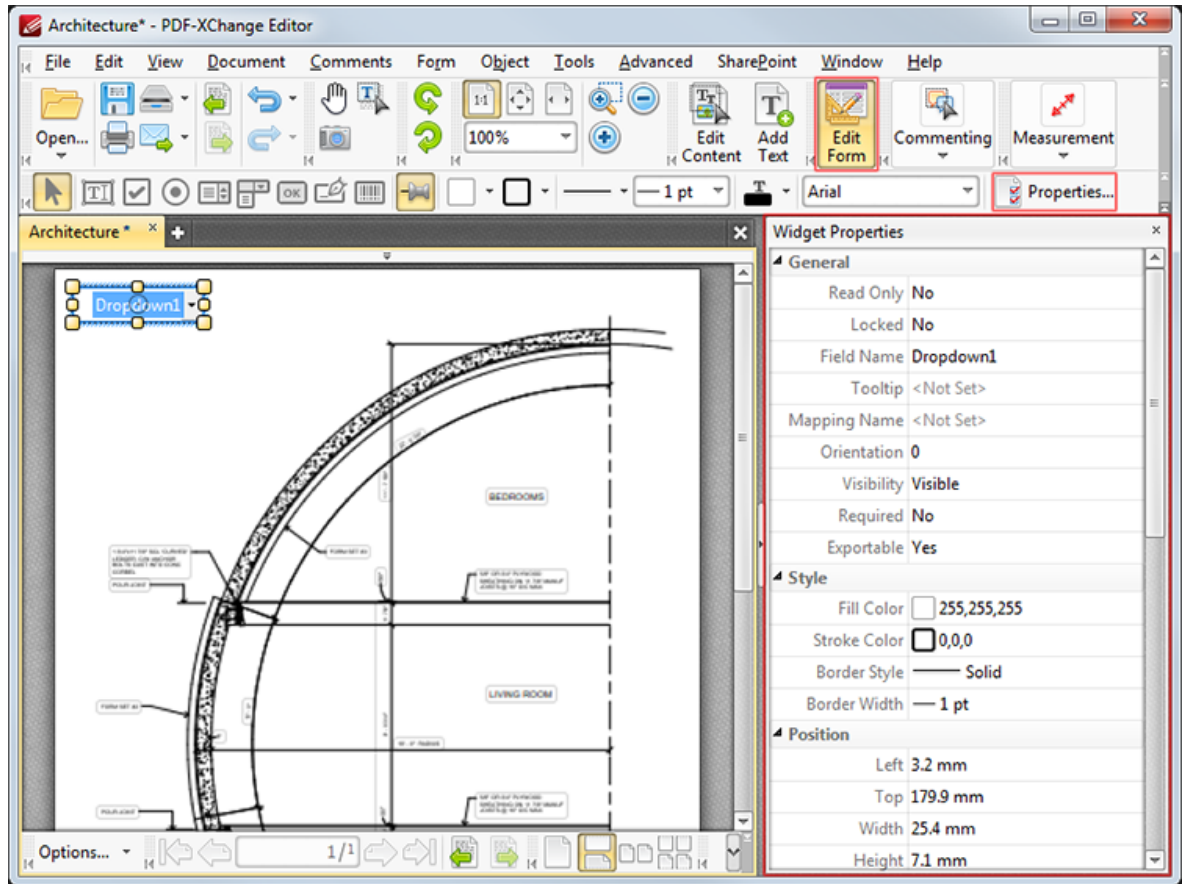
Figure 22. Value Validation Example, Widget Properties Pane

2. Scroll down the **Widget Properties** pane to the **Format Value** tab, then click the **Category** property and select **Number:**
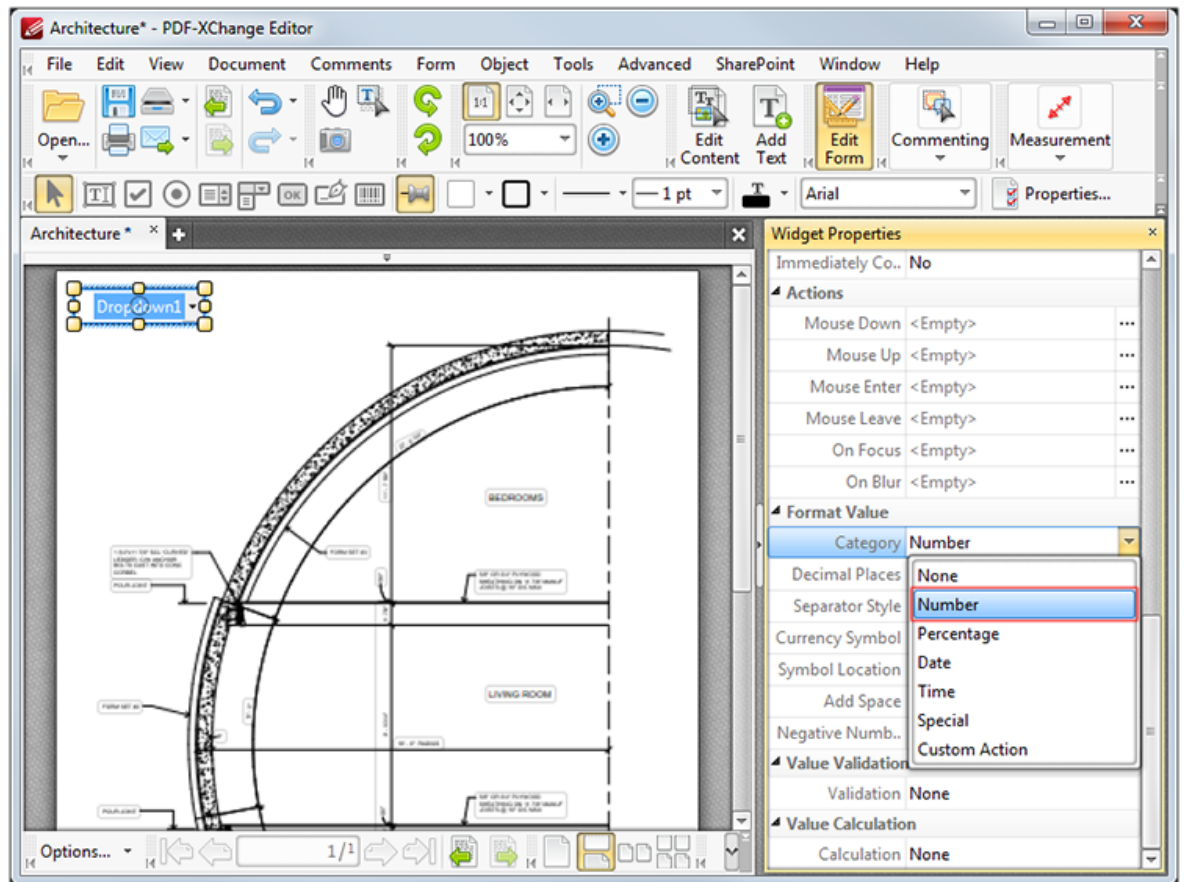
Figure 23. Value Validation Example, Category Option

3. Scroll down the **Widget Properties** pane to the **Value Validation** tab, then click the **Validation** option and select **Value in Range:**
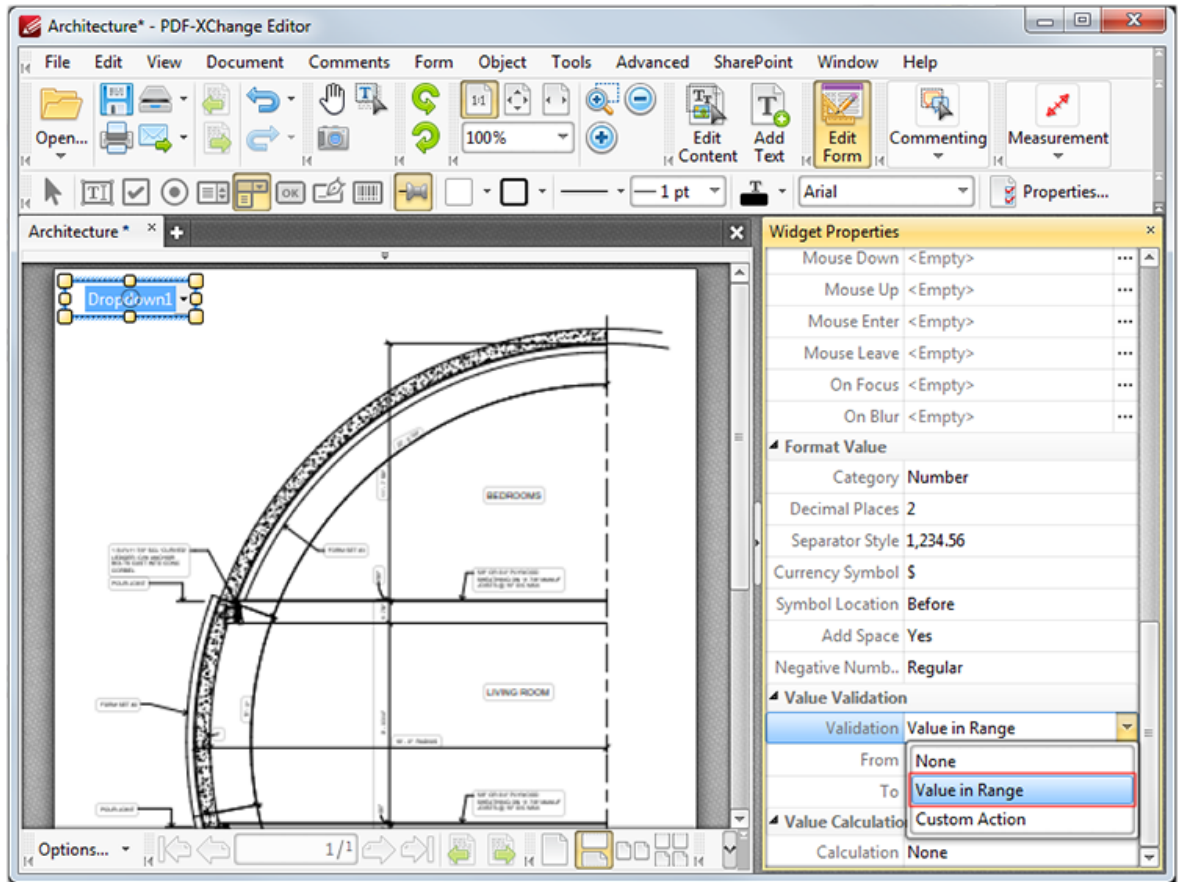
Figure 24. Value Validation Example, Validation Option

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

3. Enter '0' in the **From** option and '100' in the **To** option:
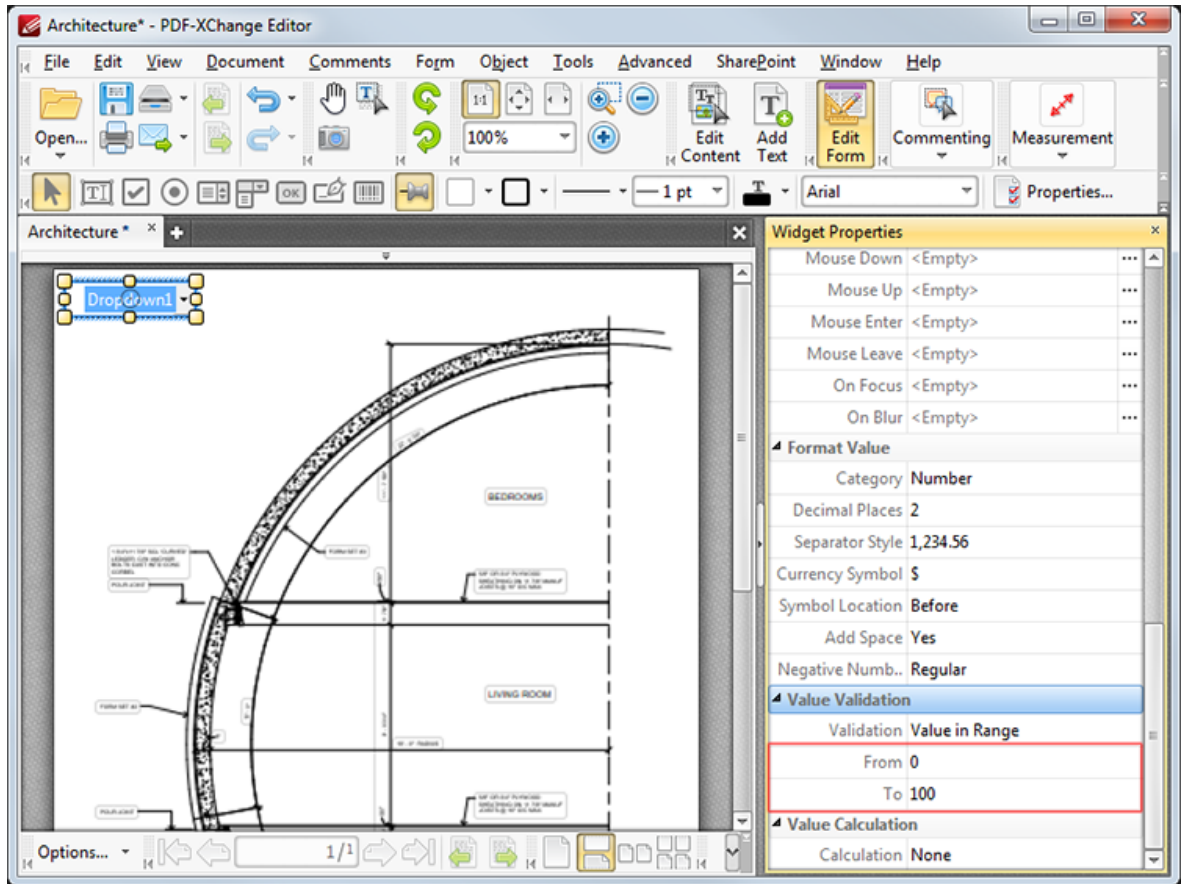
Figure 25. Value Validation Example, From/To Option

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**':
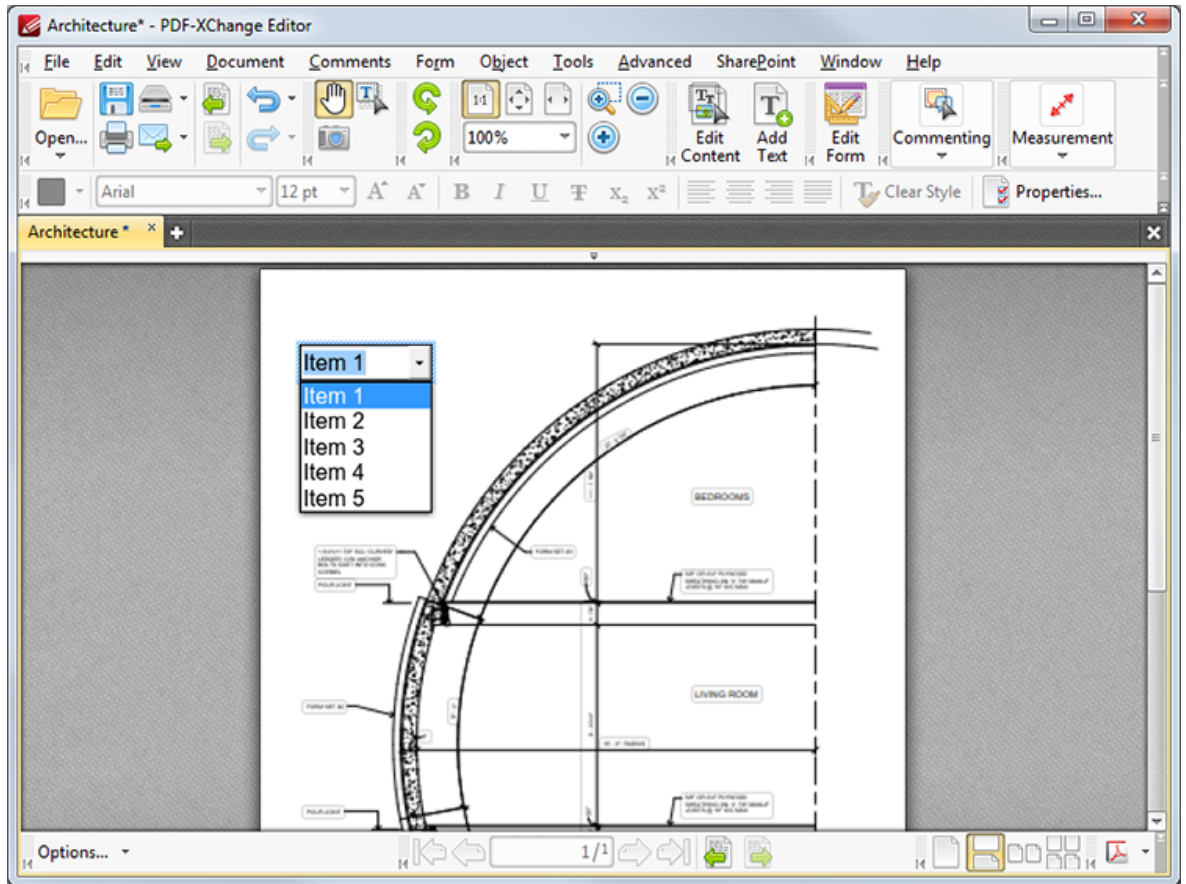
Figure 26. Default Dropdown Menu

1. Click **Edit Form,** then select the dropdown menu and click **Properties** in the
Properties Toolbar. The **Widget Properties** pane will open:
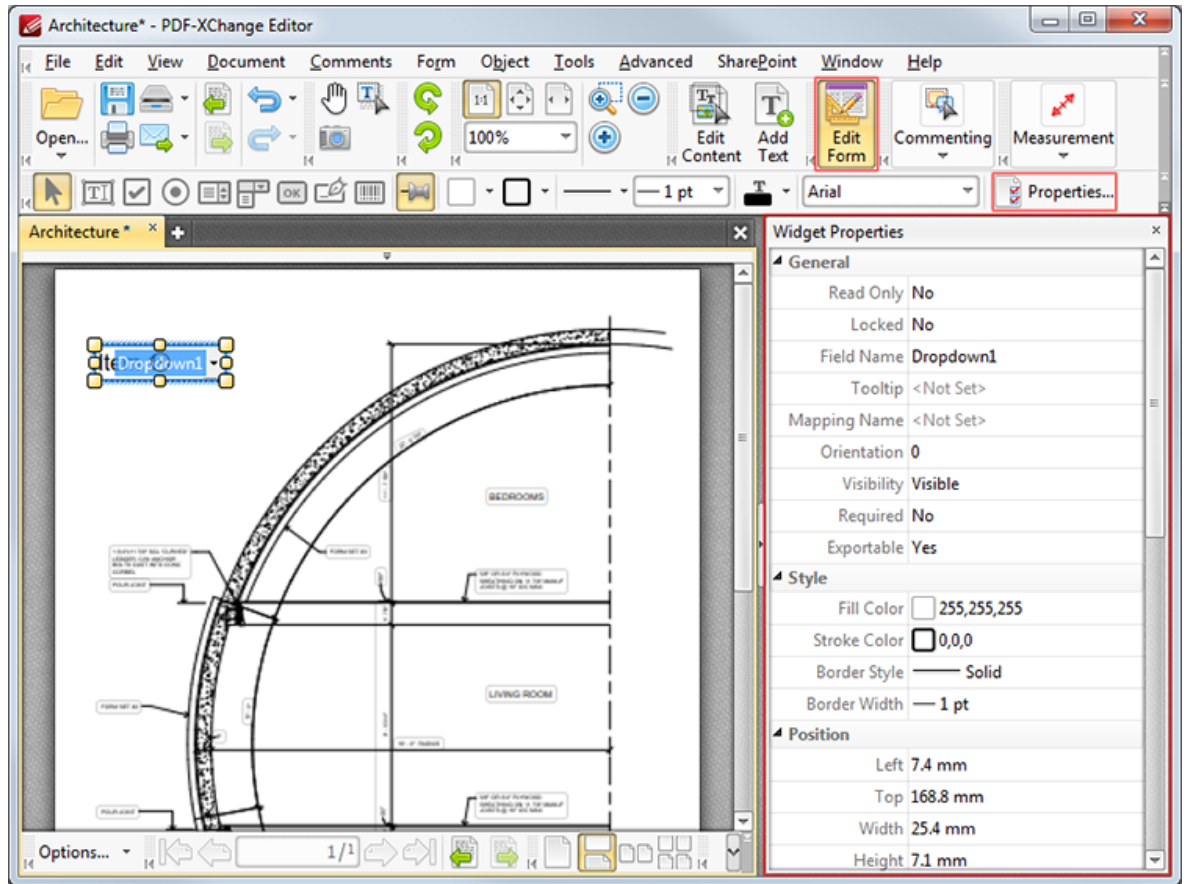
Figure 27. Dropdown Menu Tool, Widget Properties Pane

2. Scroll down the **Widget Properties** pane to the **Allow Edit** property and change the setting to **Yes:**
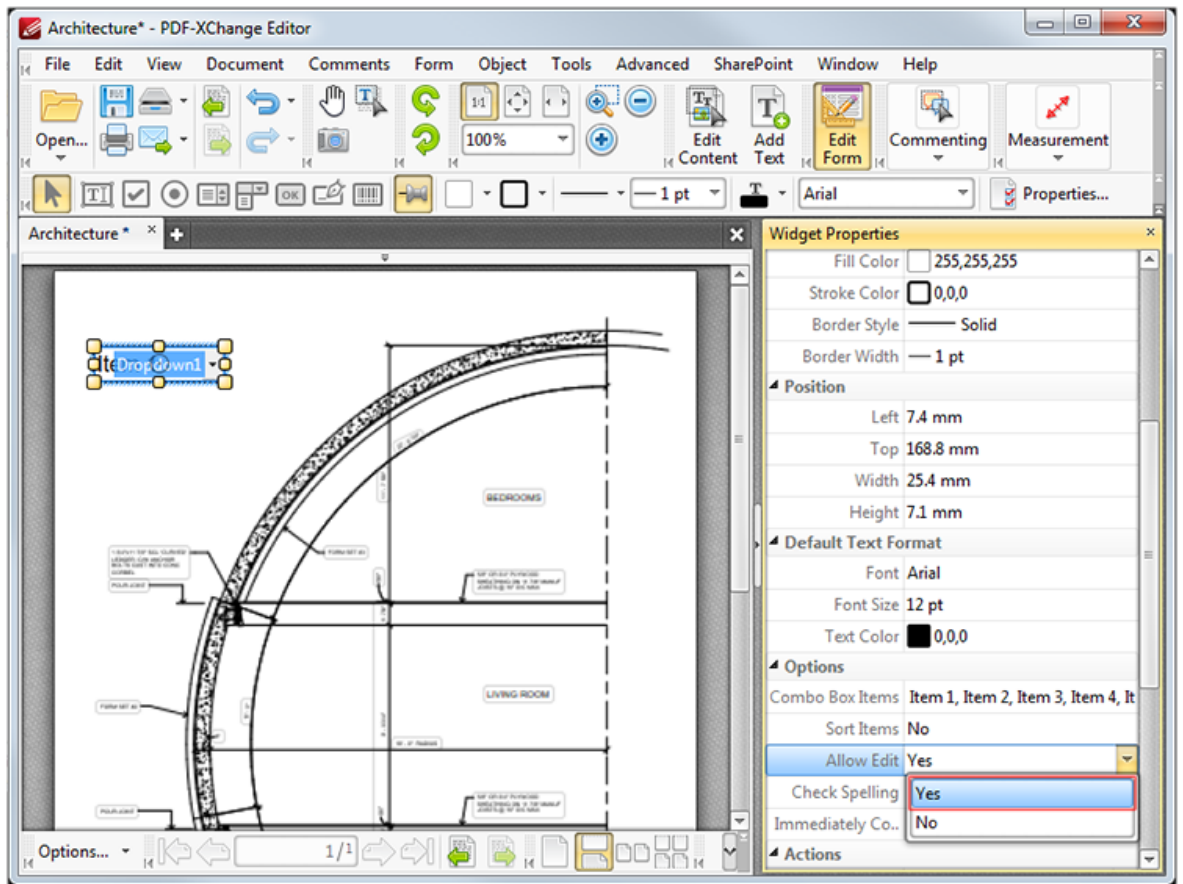
Figure 28. Dropdown Menu Tool, Allow Edit Property

3. Enable the **Hand Tool**, then click the dropdown menu and enter the desired display name. This example will use **'Select...':**
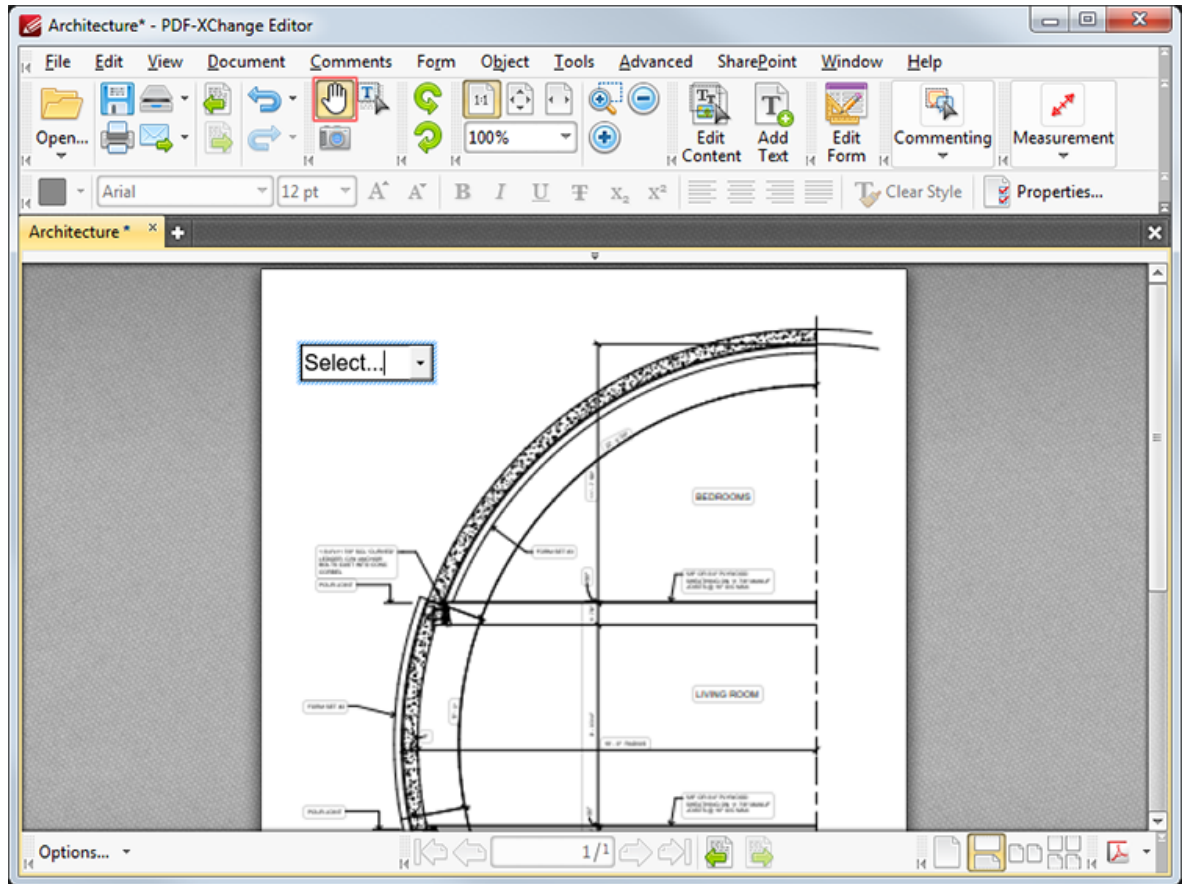
Figure 29. New Dropdown Menu Display Name

4. Click **Edit Form,** then select the dropdown menu and click **Properties** in the **Properties Toolbar.** The **Widget Properties** pane will open:
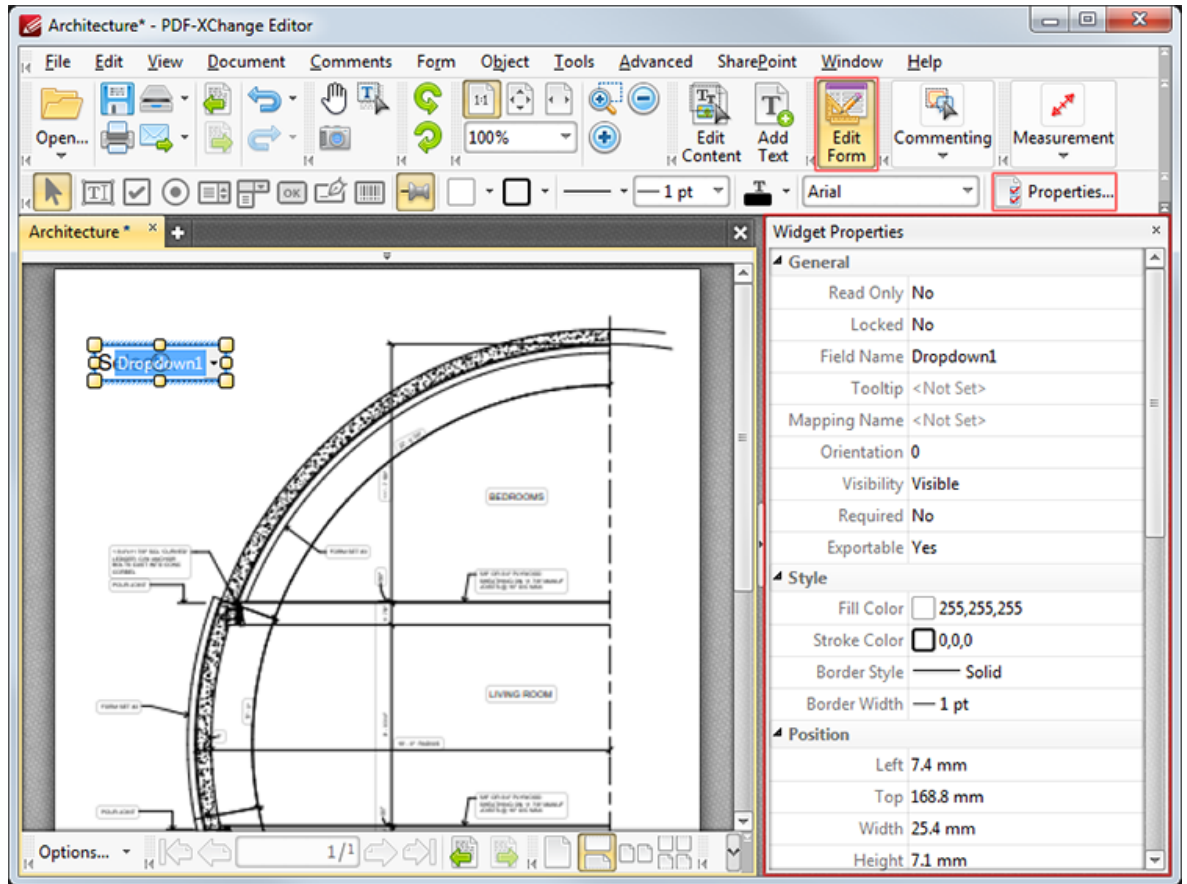
Figure 30. Dropdown Menu Tool, Widget Properties Pane

5. Scroll down the **Widget Properties** pane to the **Allow Edit** property and change the setting to **No:**
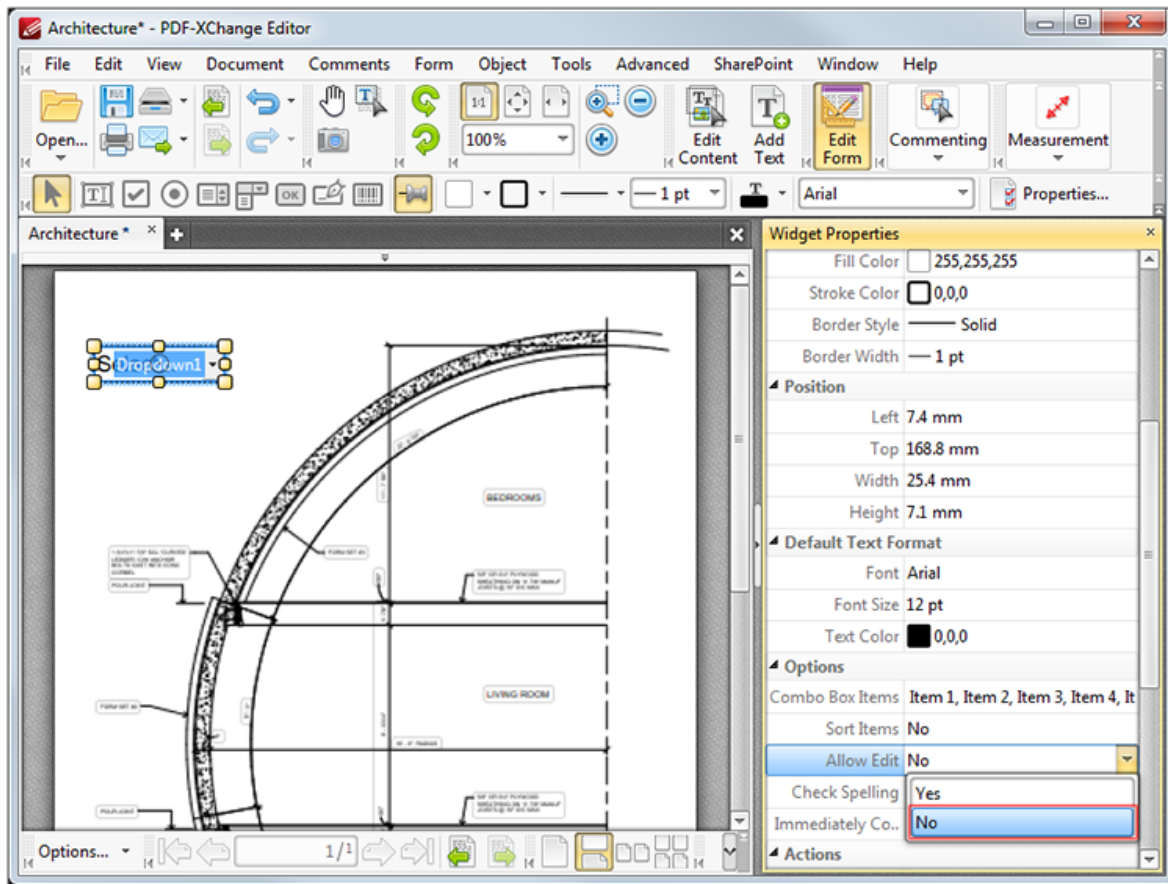
Figure 31. Dropdown Menu Tool, Allow Edit Property

The dropdown menu will display as detailed below:
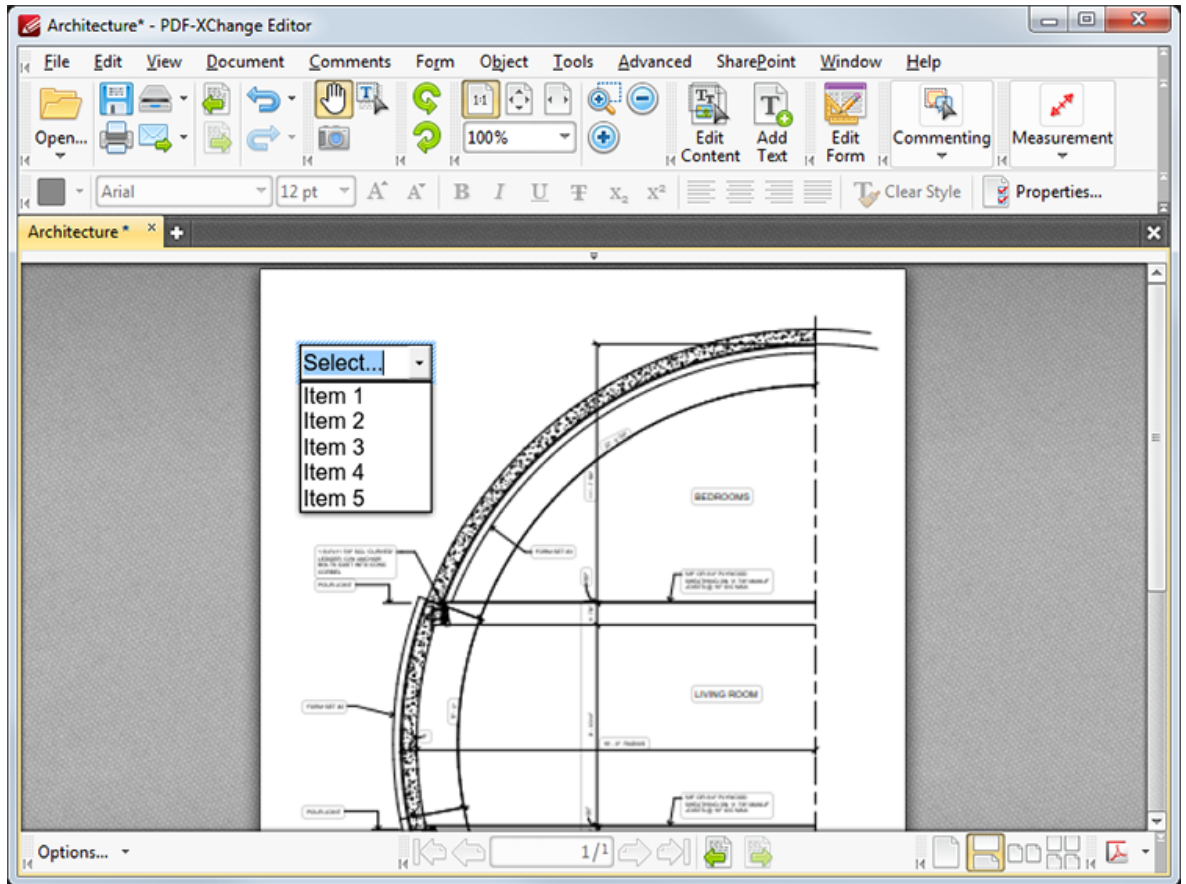
Figure 32. Dropdown Menu, New Display Name

6.3.1.7.6 Add Buttons to Documents

Add Buttons to Documents

Buttons enhance the dynamics of documents and allow users to trigger predefined events:
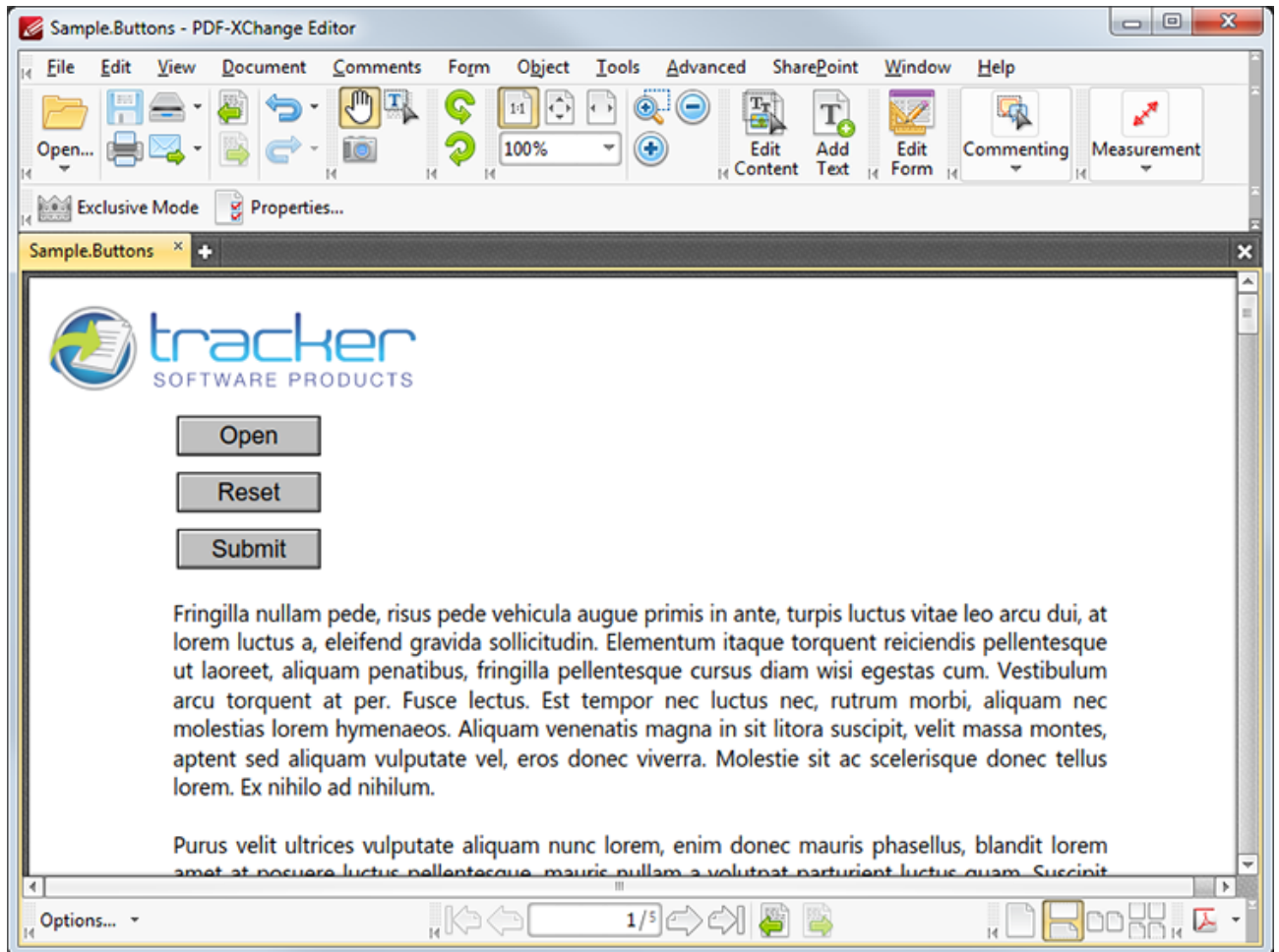
Figure 1. Example Buttons

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:
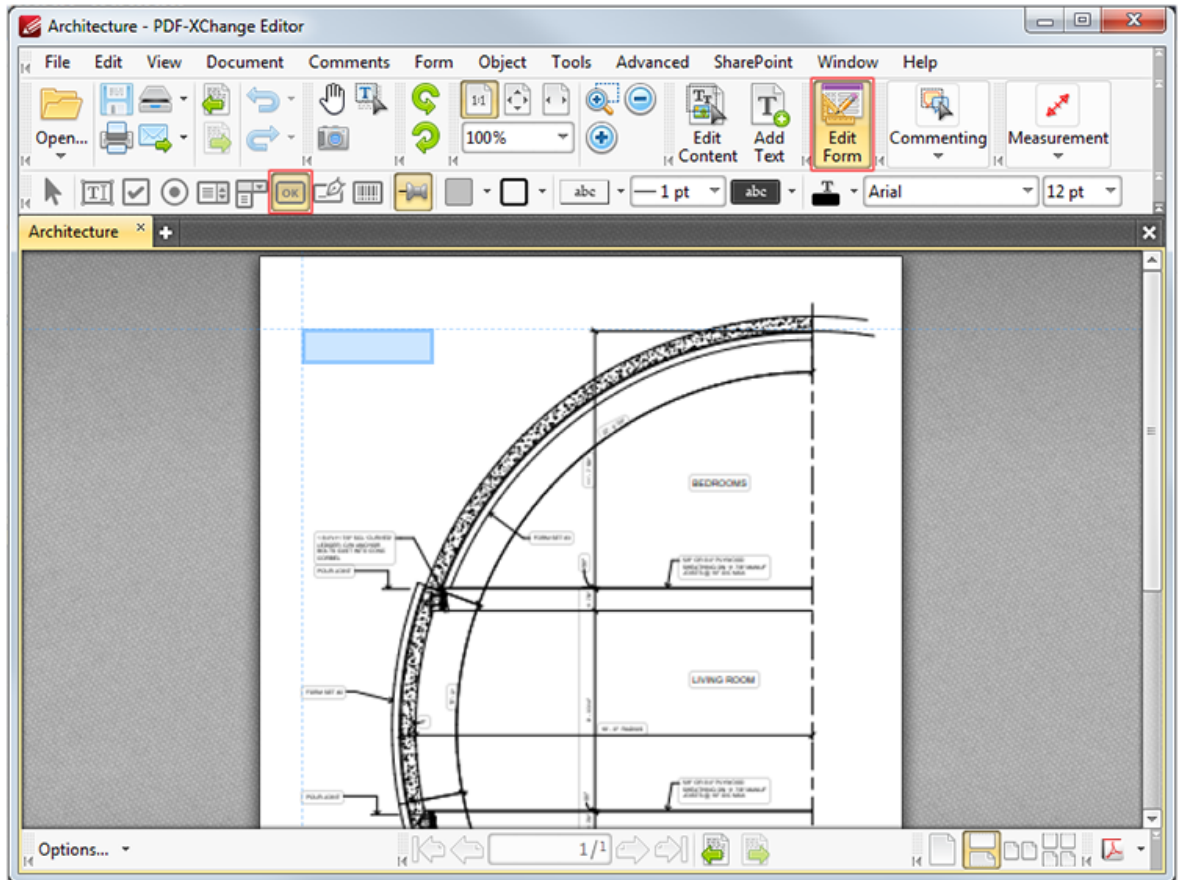
Figure 2. Active Button Tool

2. Move the rectangle to the desired location and then click to add the button to the document. (Use the editing aids detailed **here** 525 to assist in the precise placement of buttons). Added buttons appear as below:
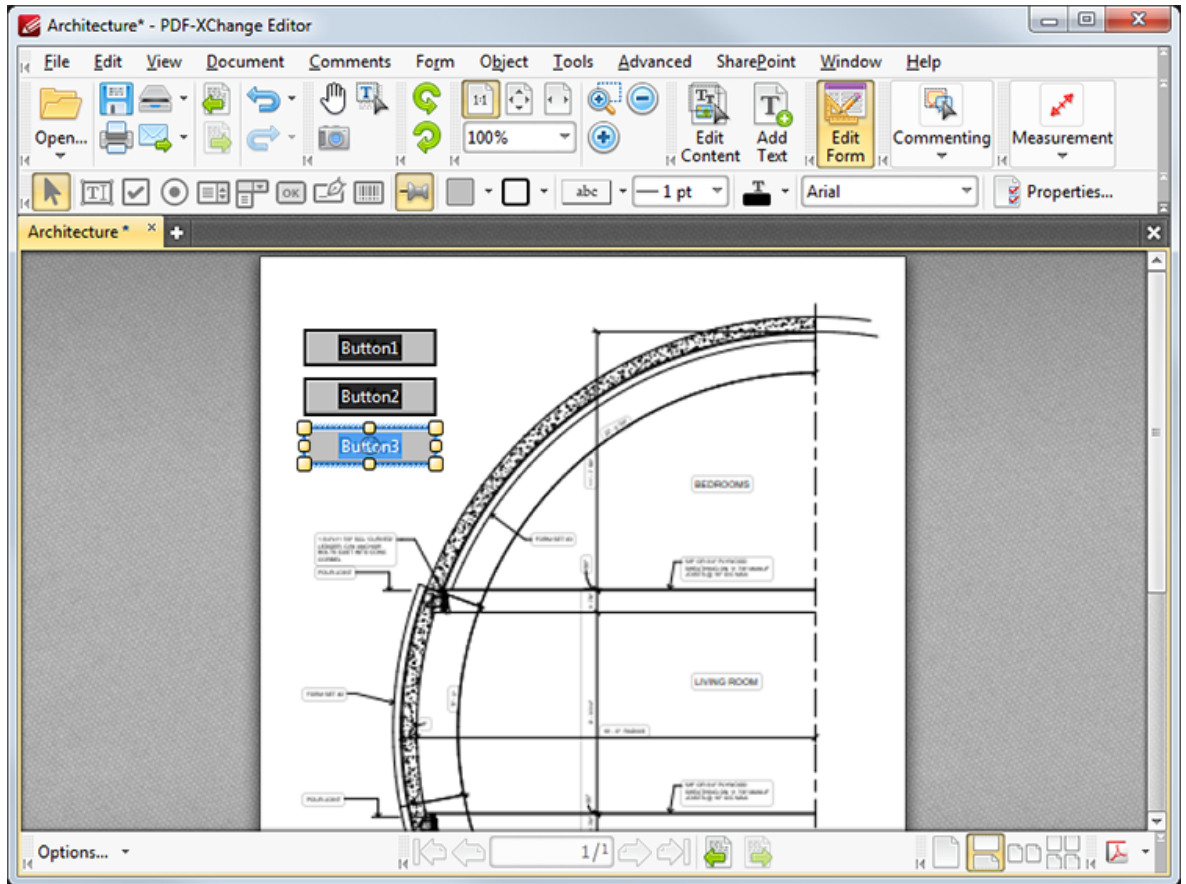
Figure 3. Added Buttons

- Click and drag the yellow control points to resize buttons.
- Use the options in the **Properties Toolbar** 484 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 **Widget Properties** pane, which enables the customization of additional elements of buttons.

▼ **The Widget Properties Pane**
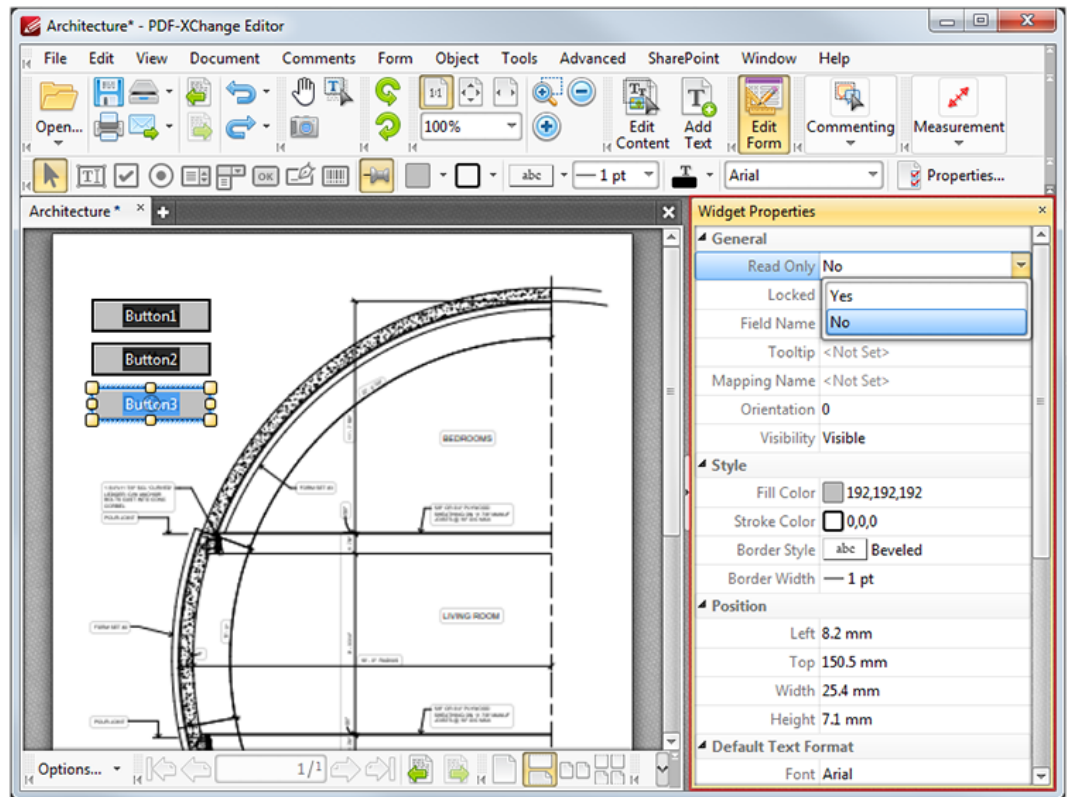
Figure 4. Button Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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.
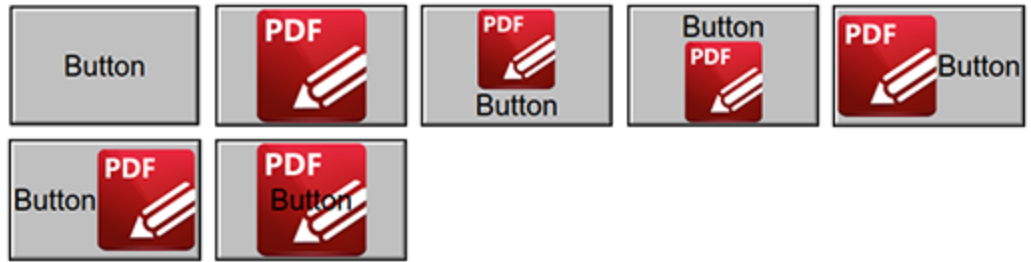
Figure 5. Available Layout Options for Buttons

- **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 the manner in which 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:
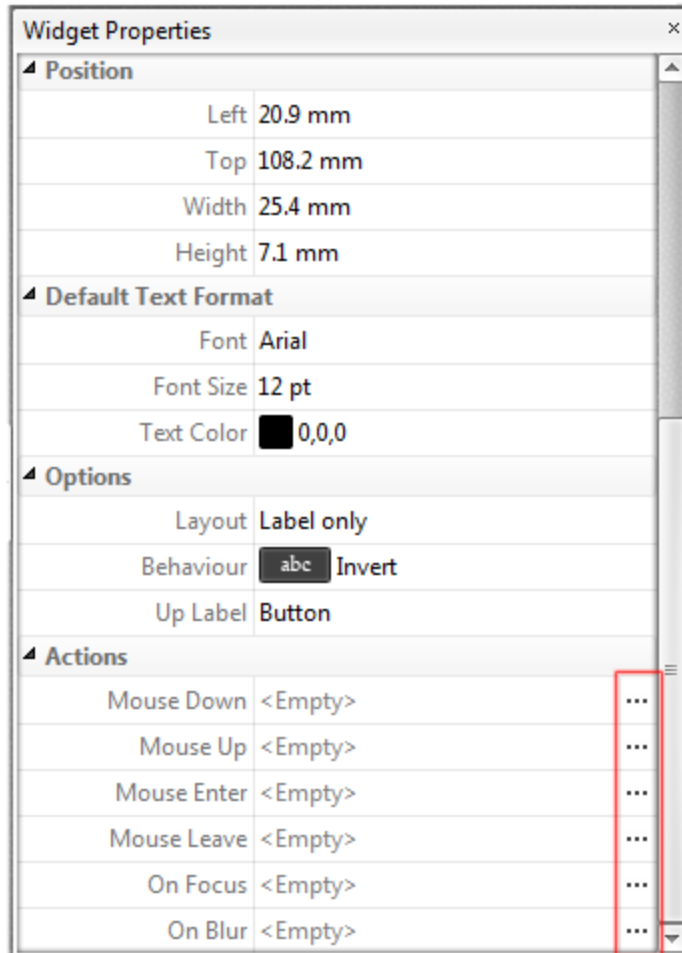
Figure 7. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** ⌐738⌐

▼ **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:
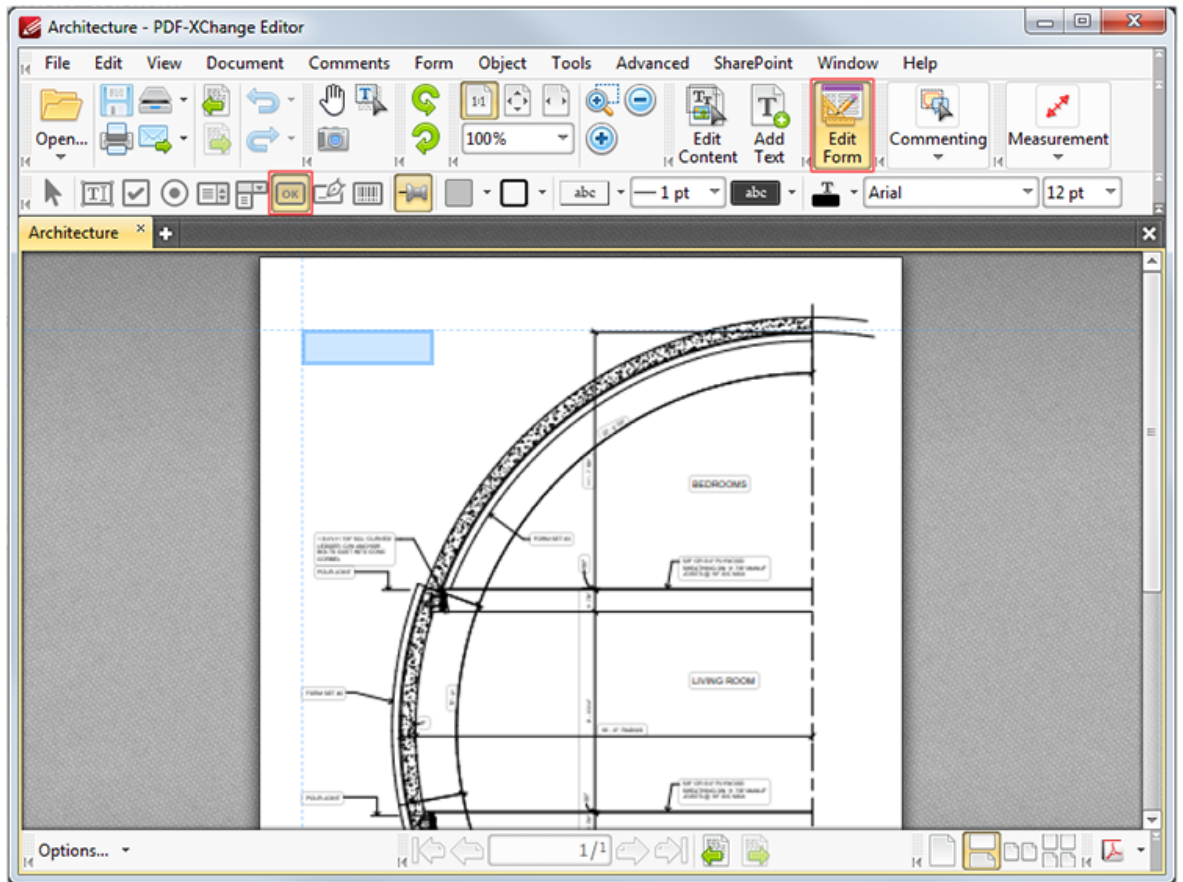
Figure 8. Active Button Tool

2. Click to add the button, then click **Properties** in the **Properties Toolbar** ⌐484⌐ to open the **Widget Properties** pane:
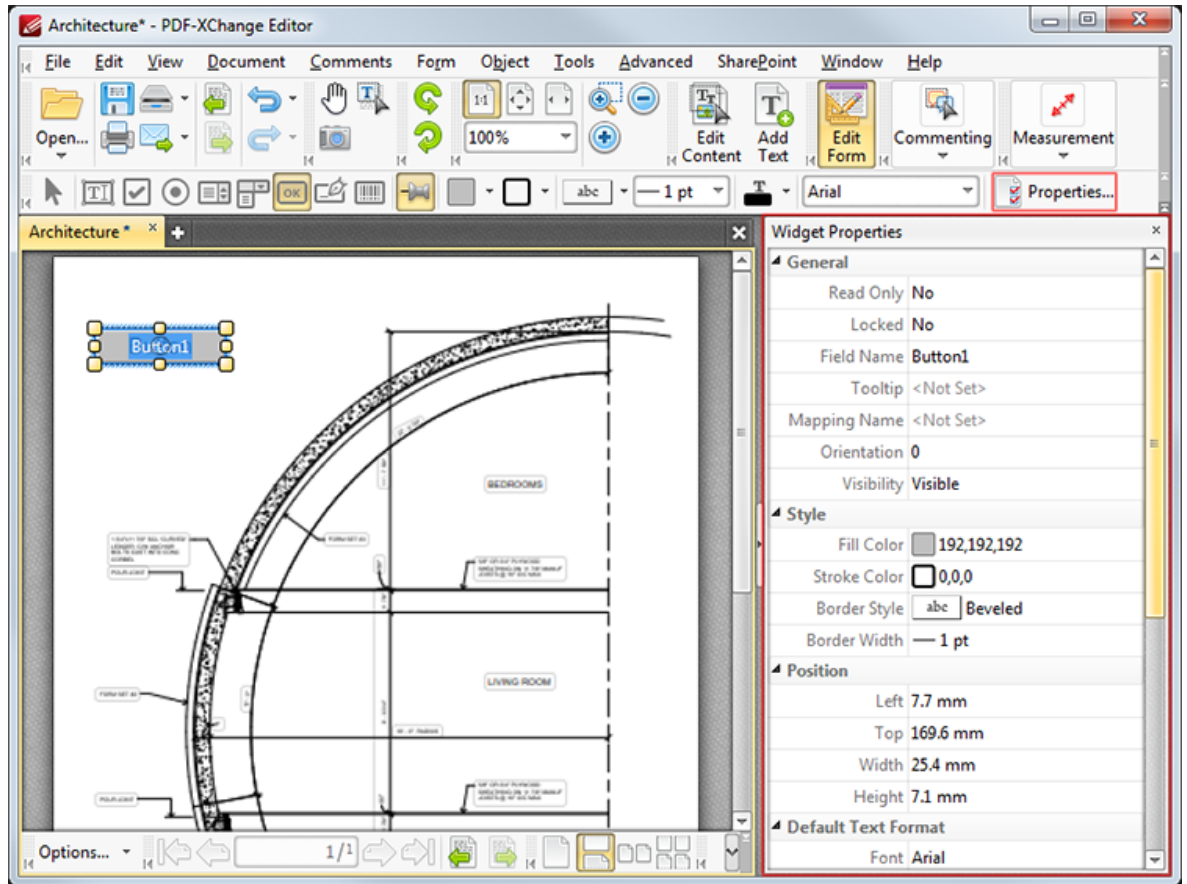
Figure 9. Active Button Tool, Widget Properties Pane

3. Scroll down the **Widget Properties** pane to the **Up Label** property, and then change its value to **"Launch Website":**
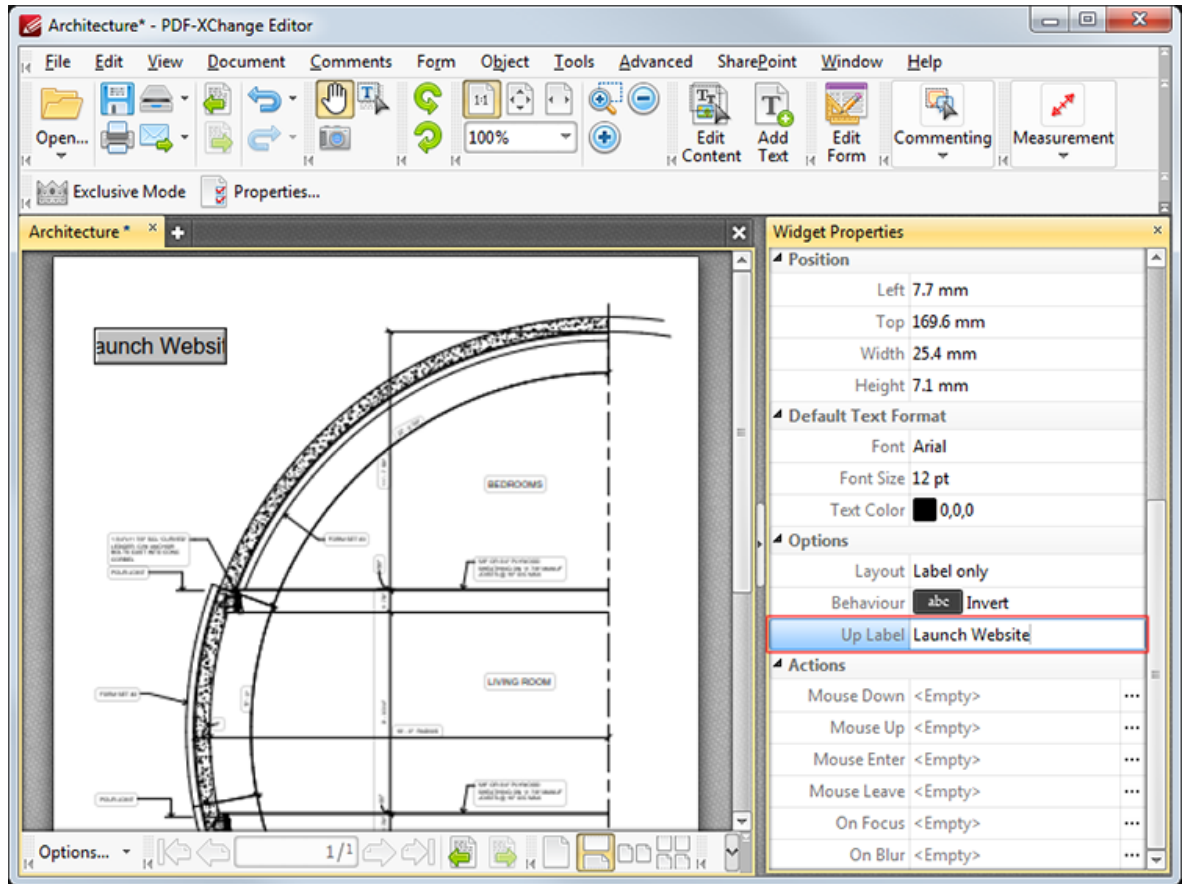
Figure 10. Active Button Tool, Up Label Property Highlighted

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:
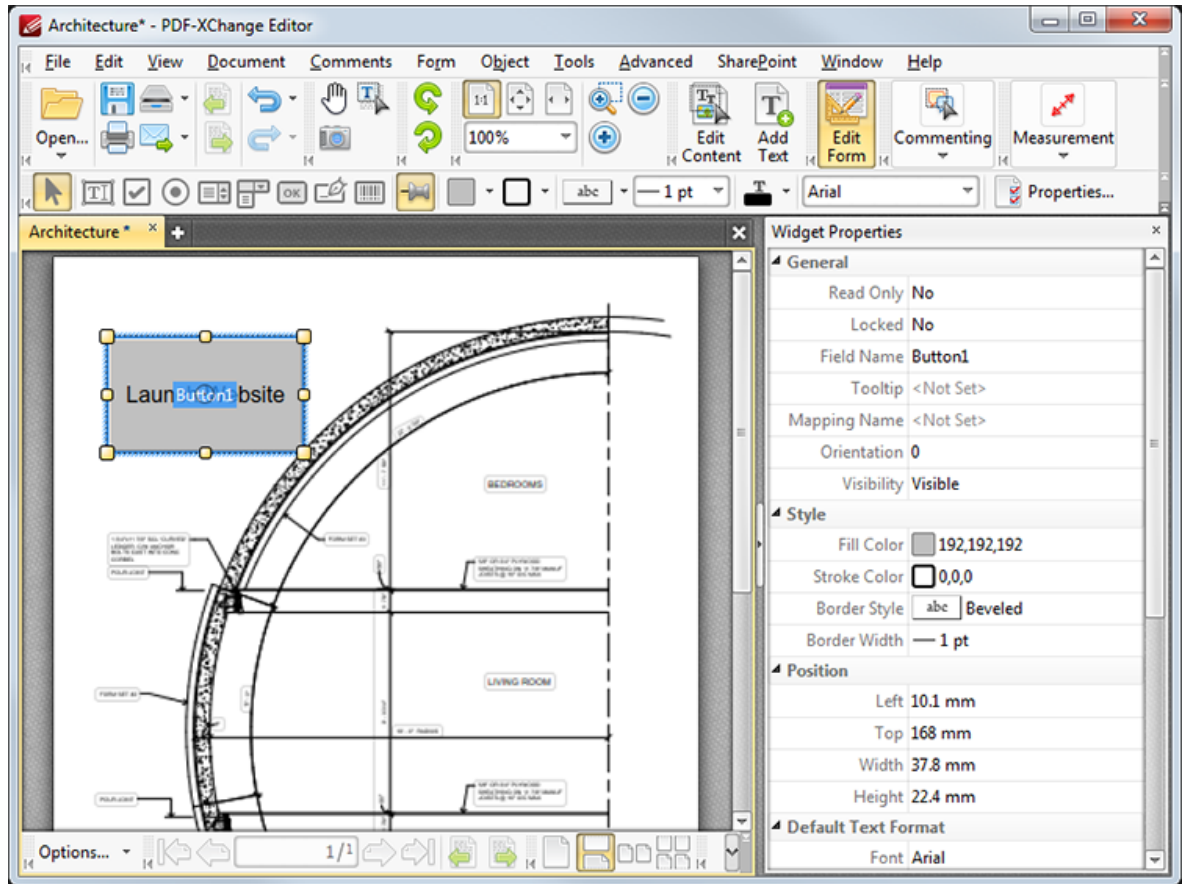
Figure 11. Resized Button

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 **Widget Properties** pane. Move to the **Options** tab, then select **Icon top, label button.** 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:
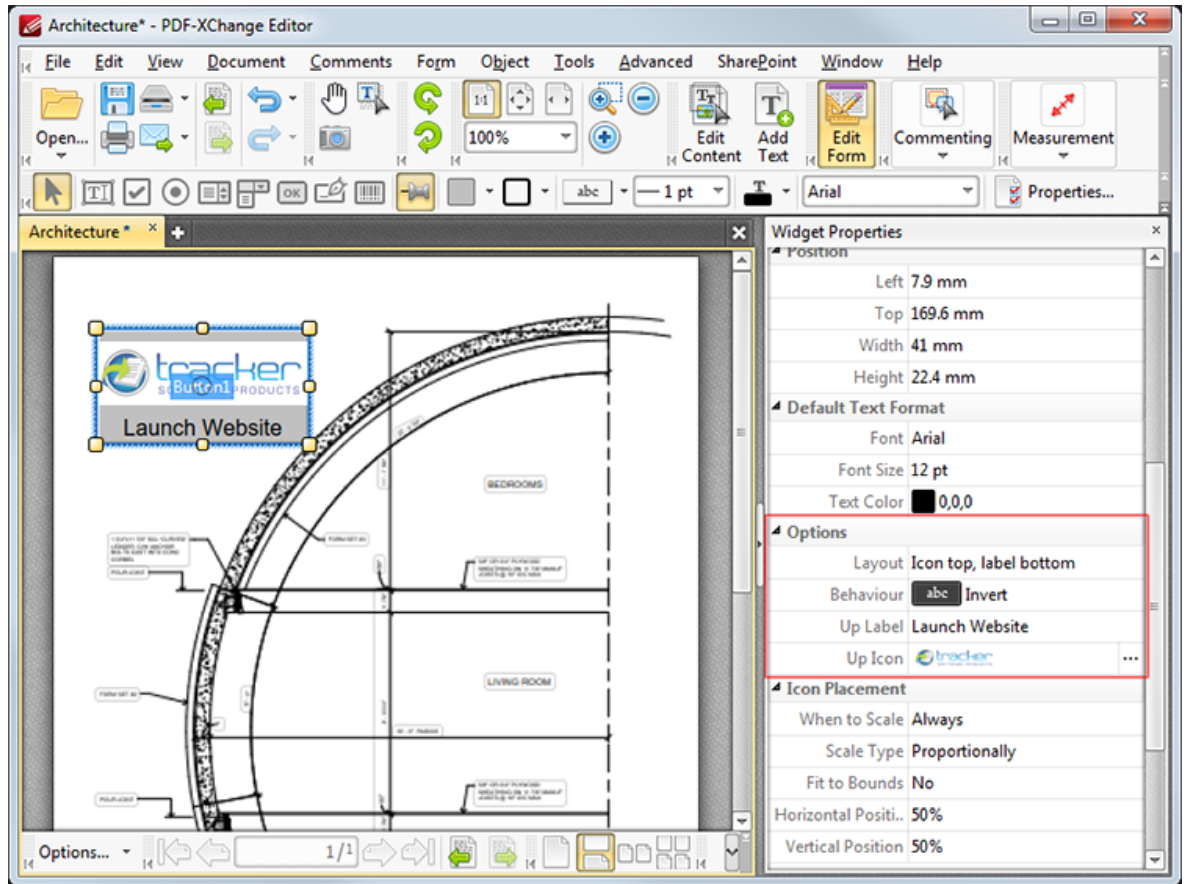
Figure 12. Widget Properties Pane, Options Properties

The next step is to add the action to the button:

6. Click **Edit Form,** and then select the button to view its properties in the **Widget Properties** pane. Scroll down the **Widget Properties** pane to the **Actions tab,** then click the ellipsis icon on the right of the **Mouse Up** property:
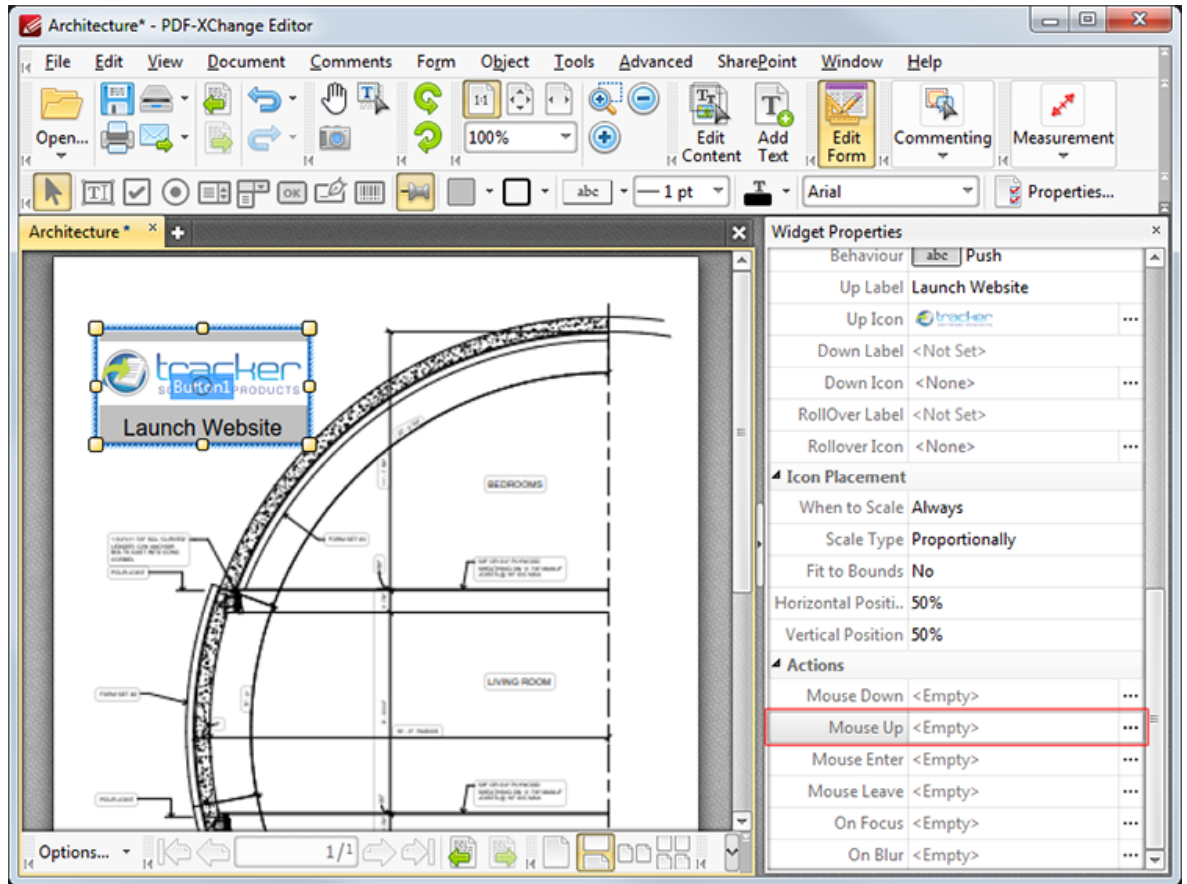
Figure 13. Widget Properties Pane, Mouse Up Property

The **Edit Action List** dialog box will open.

7. Click **Add** and then click **Open a Web Link** in the submenu:
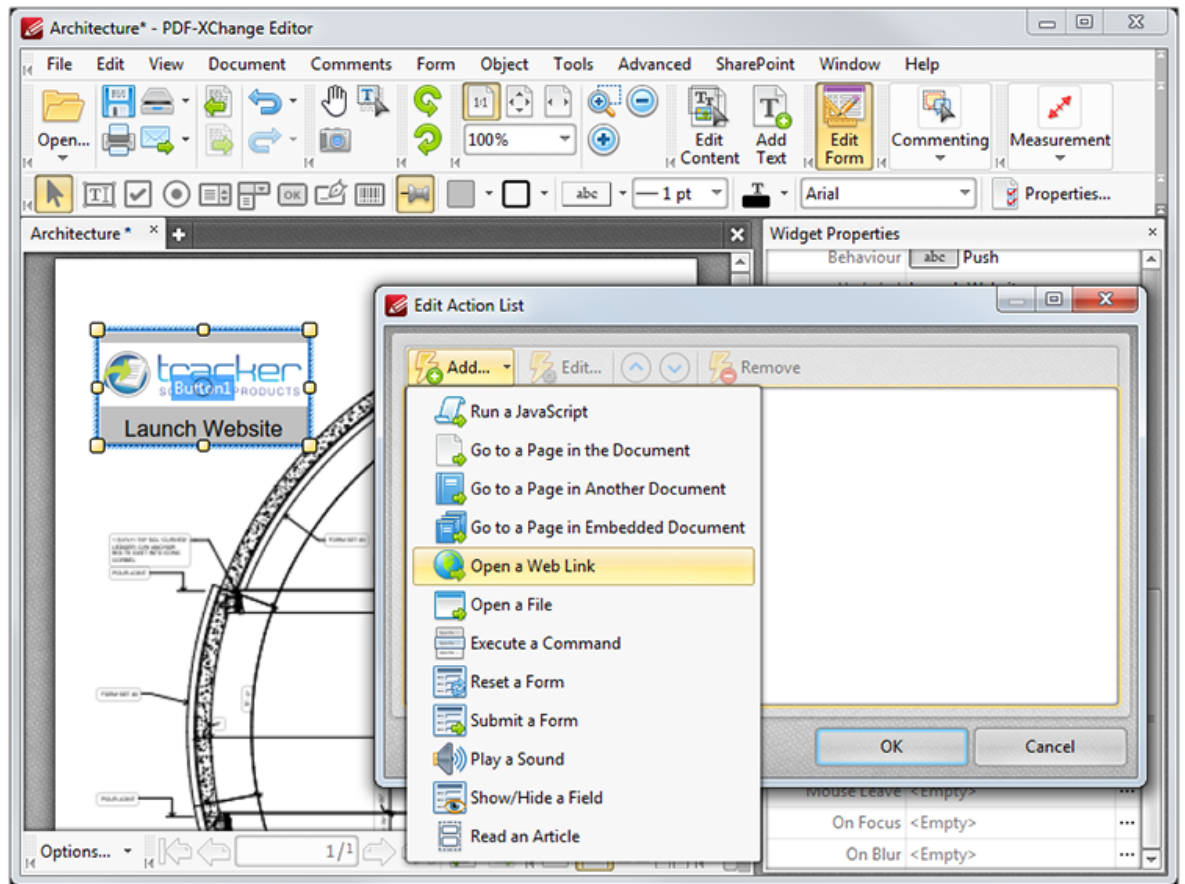
Figure 14. Button Tool, Edit Action List Dialog Box

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:
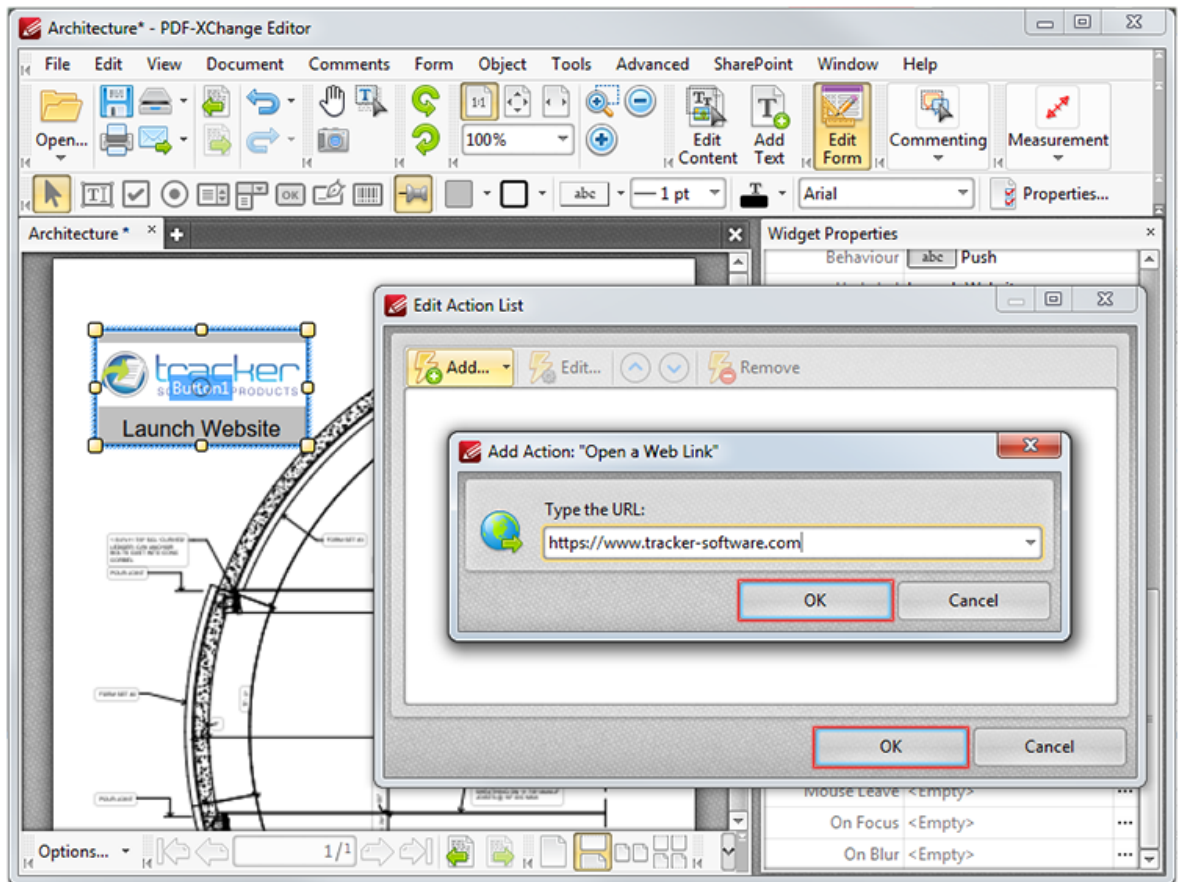
Figure 15. Button Tool, Add Action: "Open a Web Link" Dialog Box

9. Press Ctrl+' to activate the grid in order to reposition the button precisely, then click and drag it to a better location:
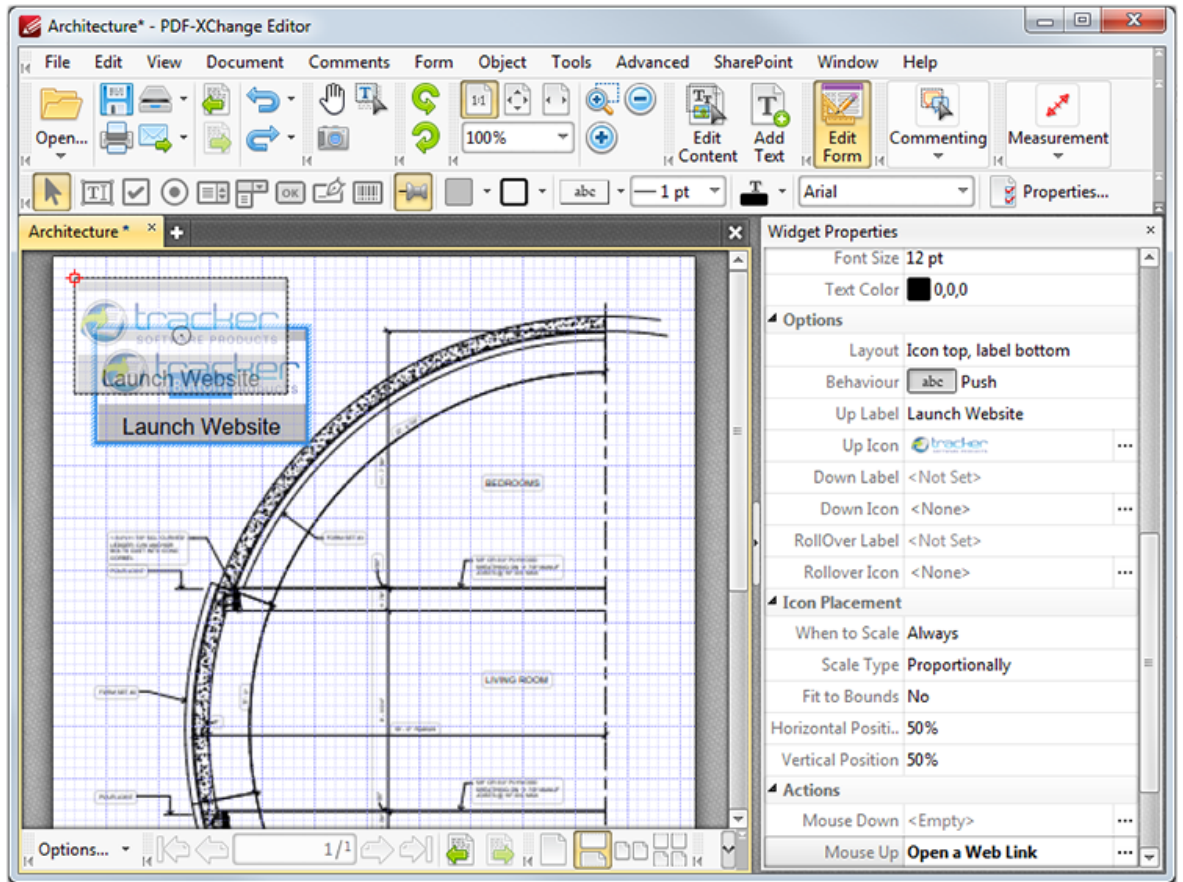
Figure 16. Button Repositioning

10. Press Ctrl+' to disable the grid. The button is then complete and will launch the **PDF-XChange** website when it is clicked:
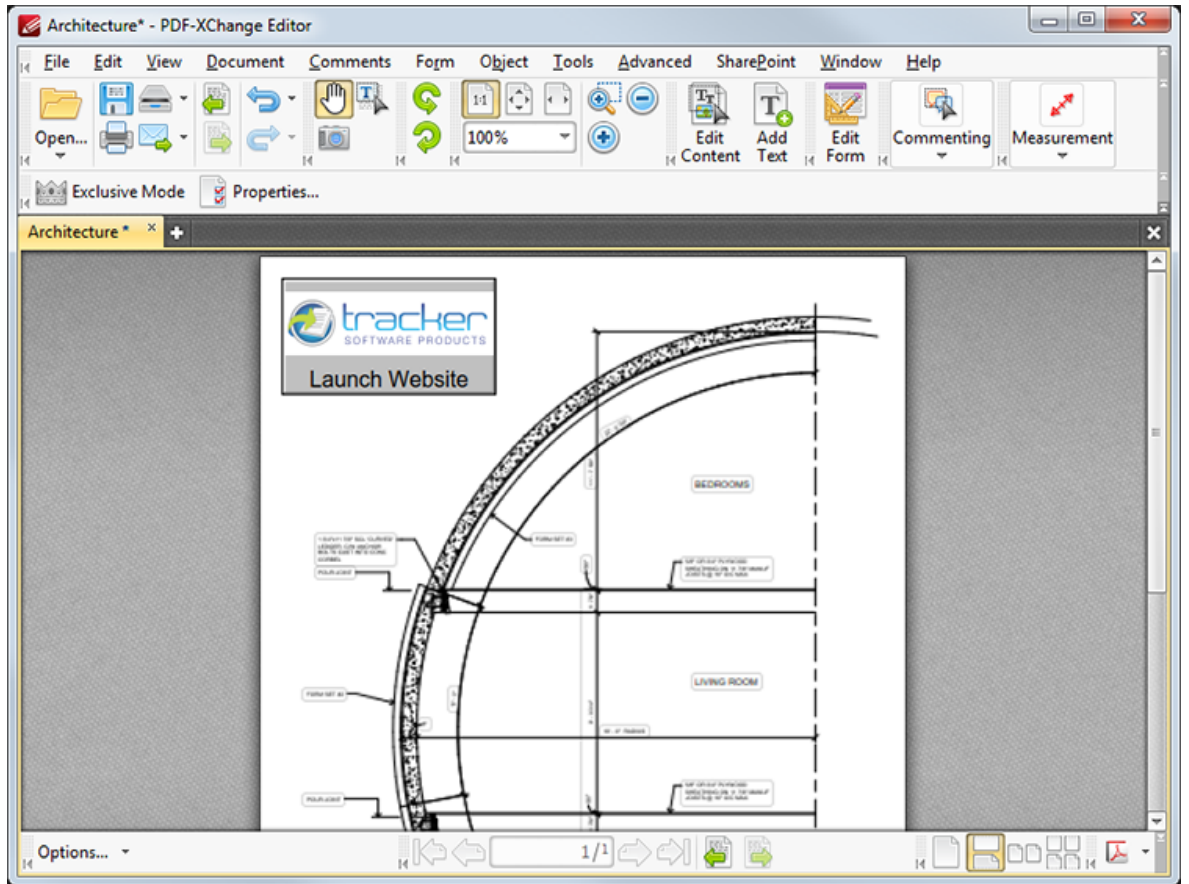
Figure 17. Completed Button

6.3.1.7.7 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:
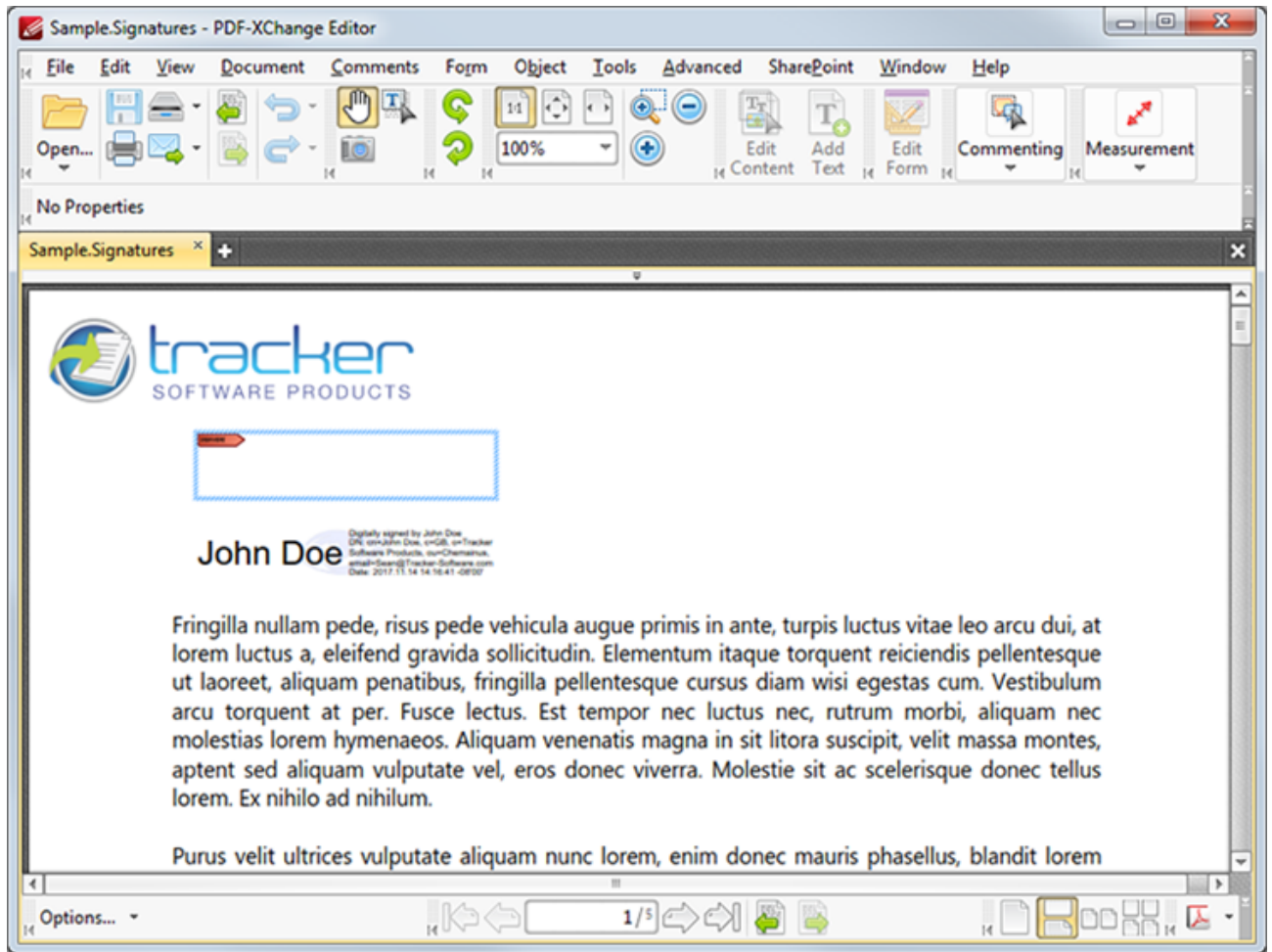
Figure 1. Sample Signature Fields, Unsigned (above) and Signed (below)

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:
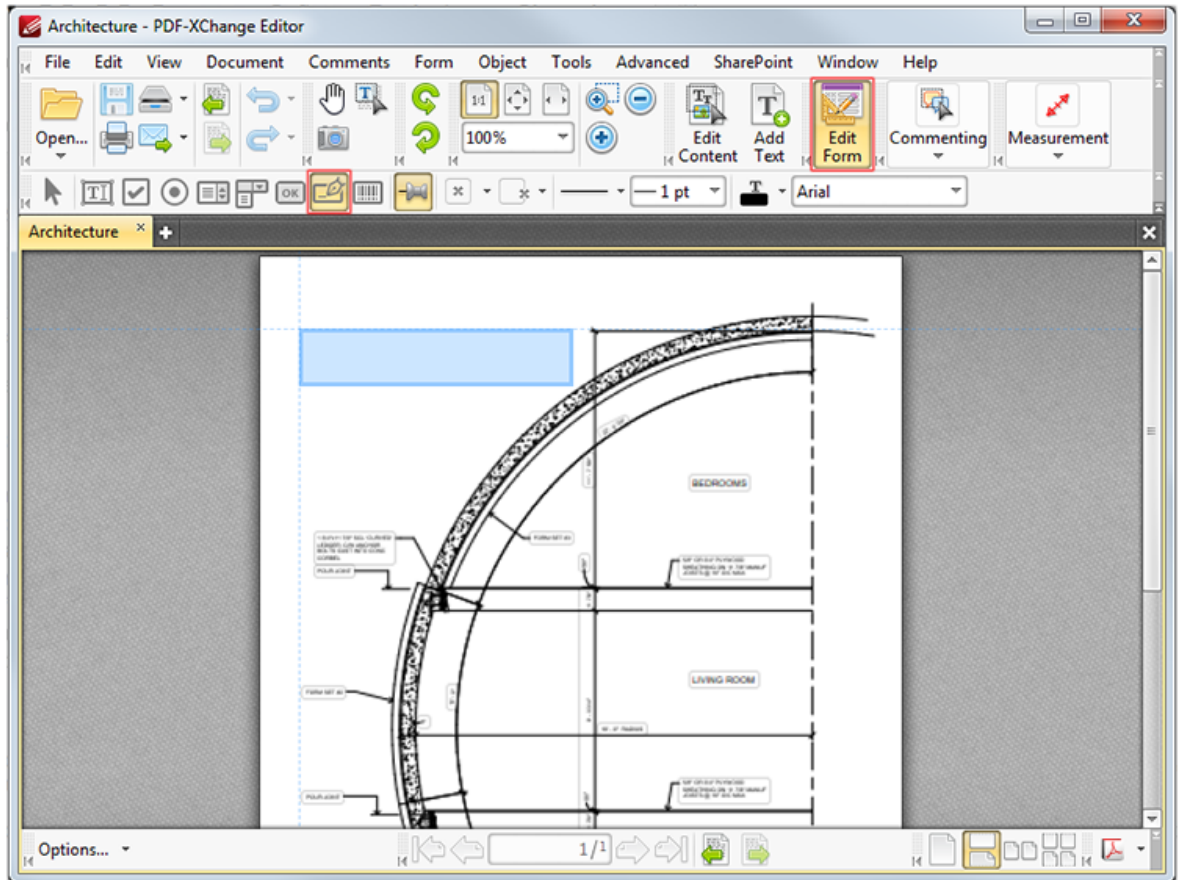
Figure 2. Active Signature Field Tool

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** 525 to assist in the precise placement of signature fields). Added signature fields appear as below:
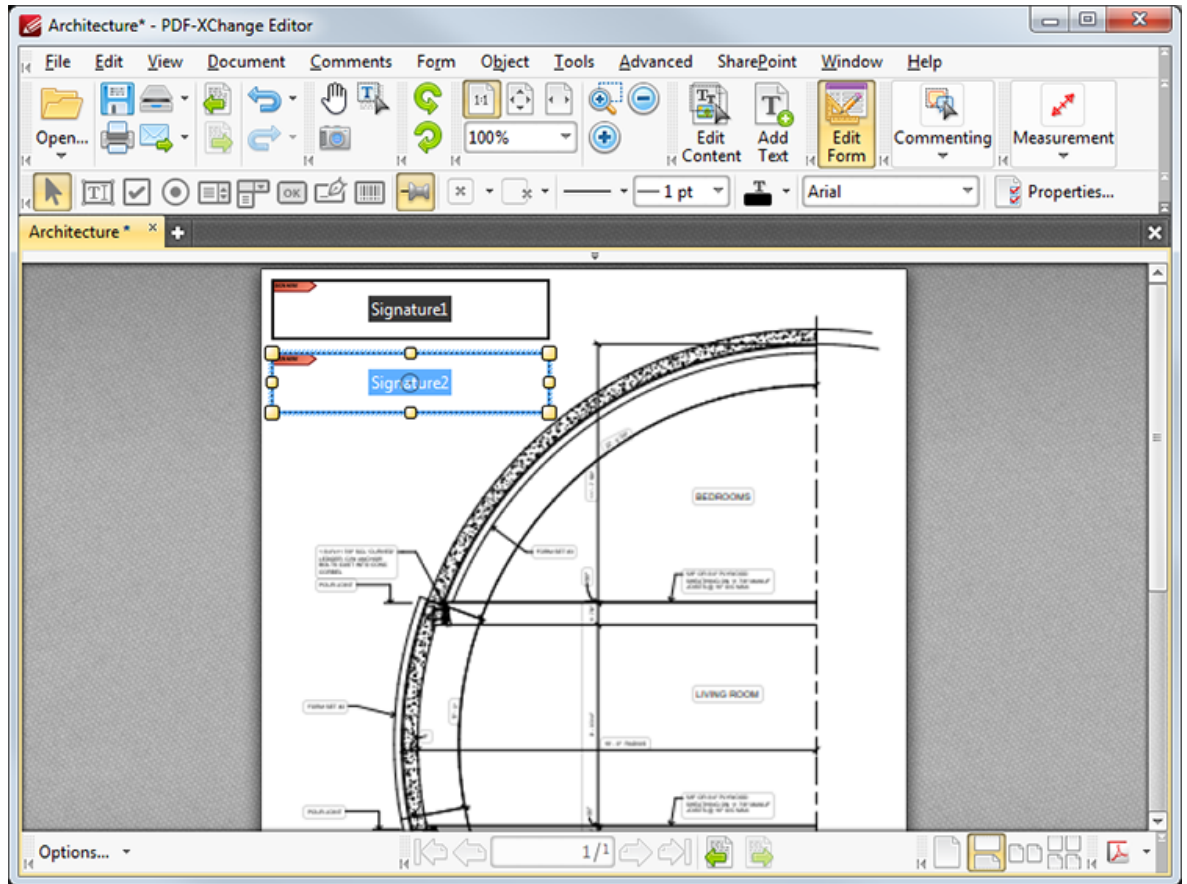
Figure 3. Added Signature Fields

- Click and drag the yellow control points to resize signature fields.
- Use the options in the **Properties Toolbar** 484 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 **Widget Properties** pane, which enables the customization of additional elements of signature fields.

▼ **The Widget Properties Pane**
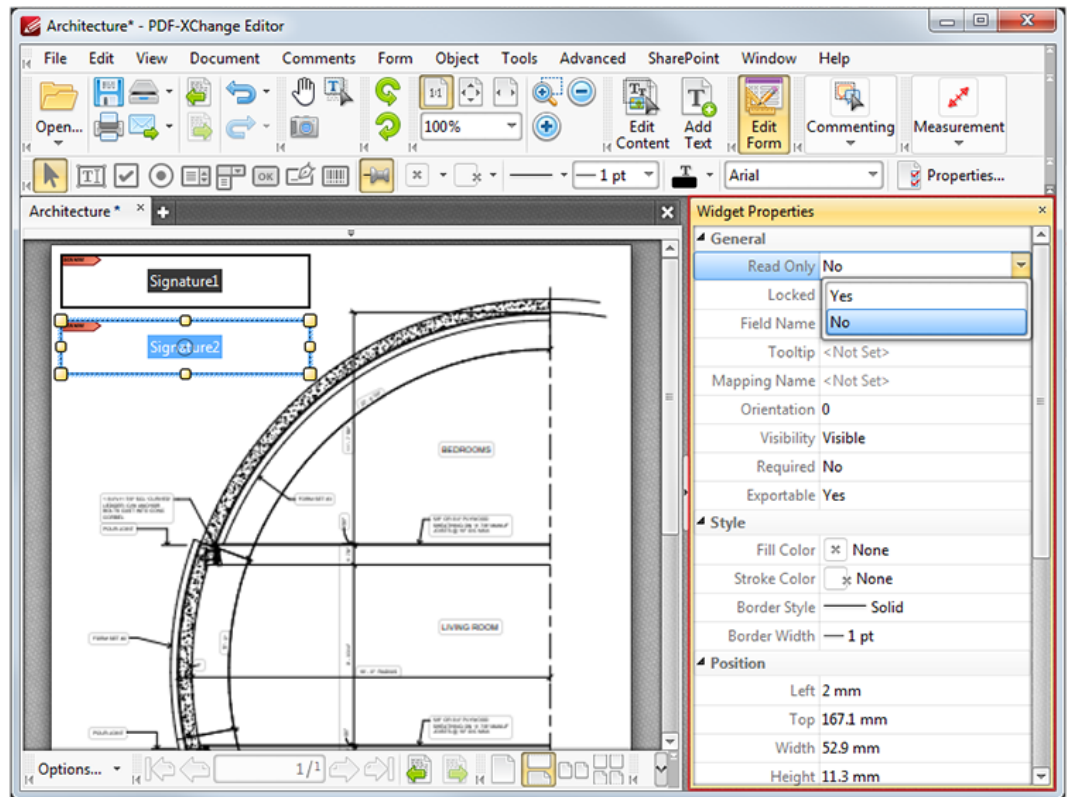
Figure 4. Signature Field Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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:
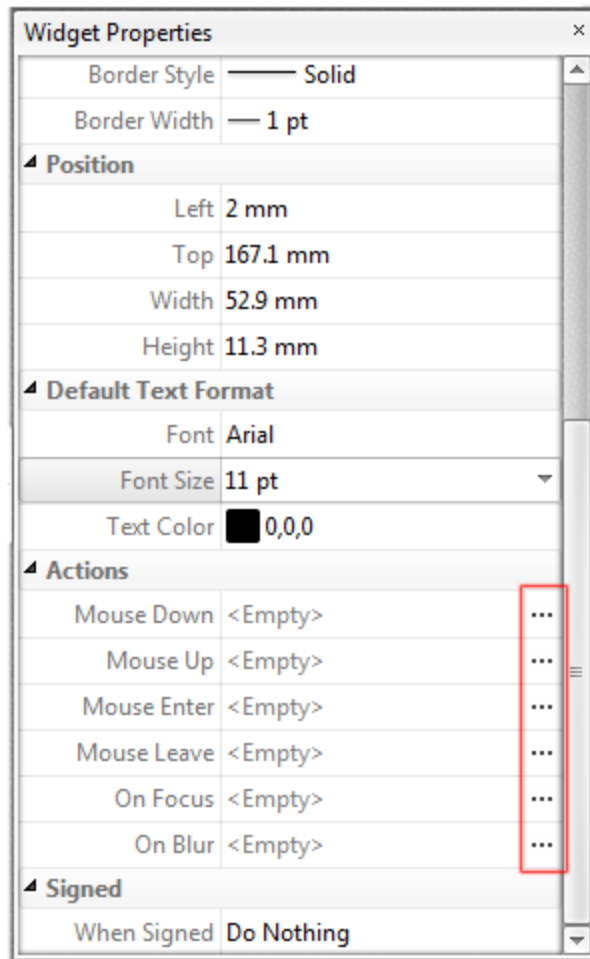
Figure 5. Widget Properties Pane, Action Ellipses

The process of adding actions is detailed **here.** [738]

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:
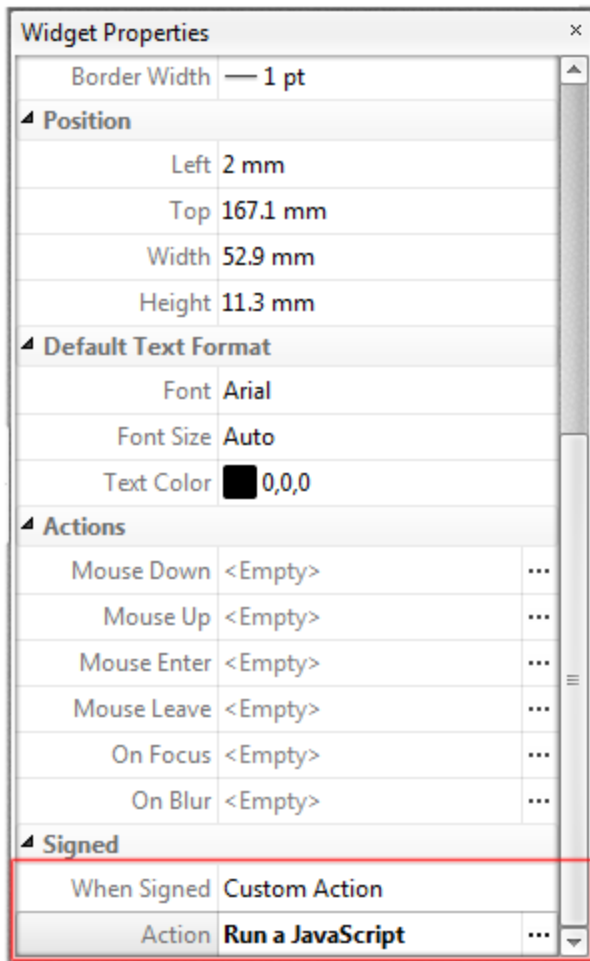
Figure 6. Widget Properties Pane, Action Property

The **Edit Action: "Run a JavaScript"** dialog box will open. Enter the desired JavaScript for the action and then click **OK:**
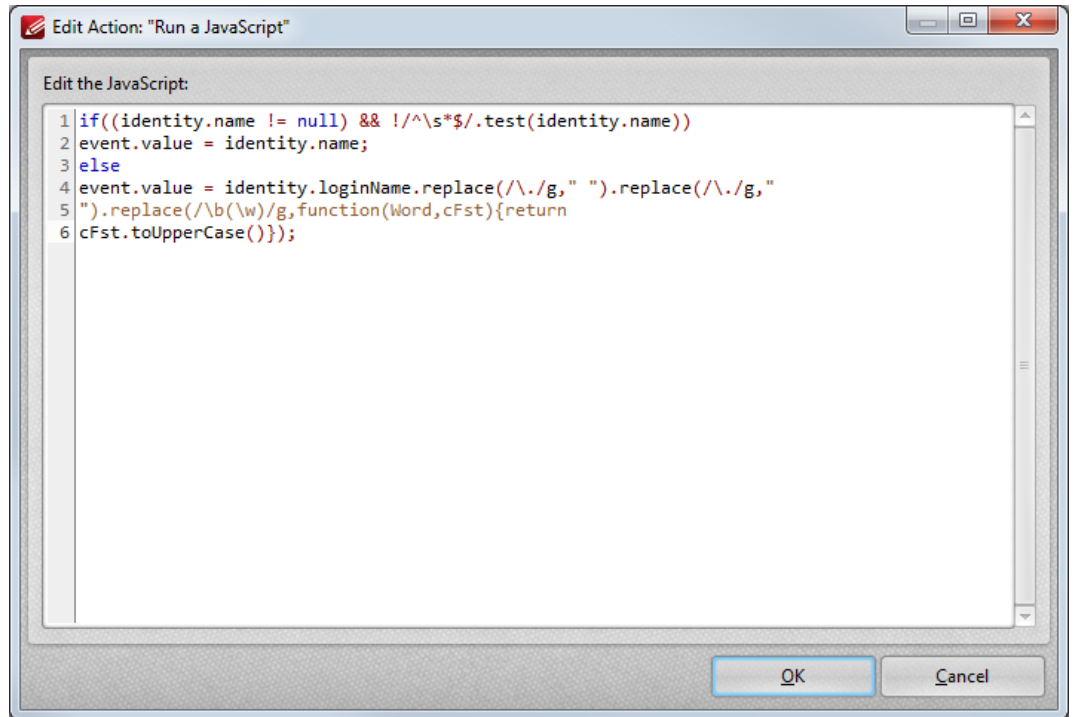
Figure 7. Edit Action: "Run a JavaScript" Dialog Box

- **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:
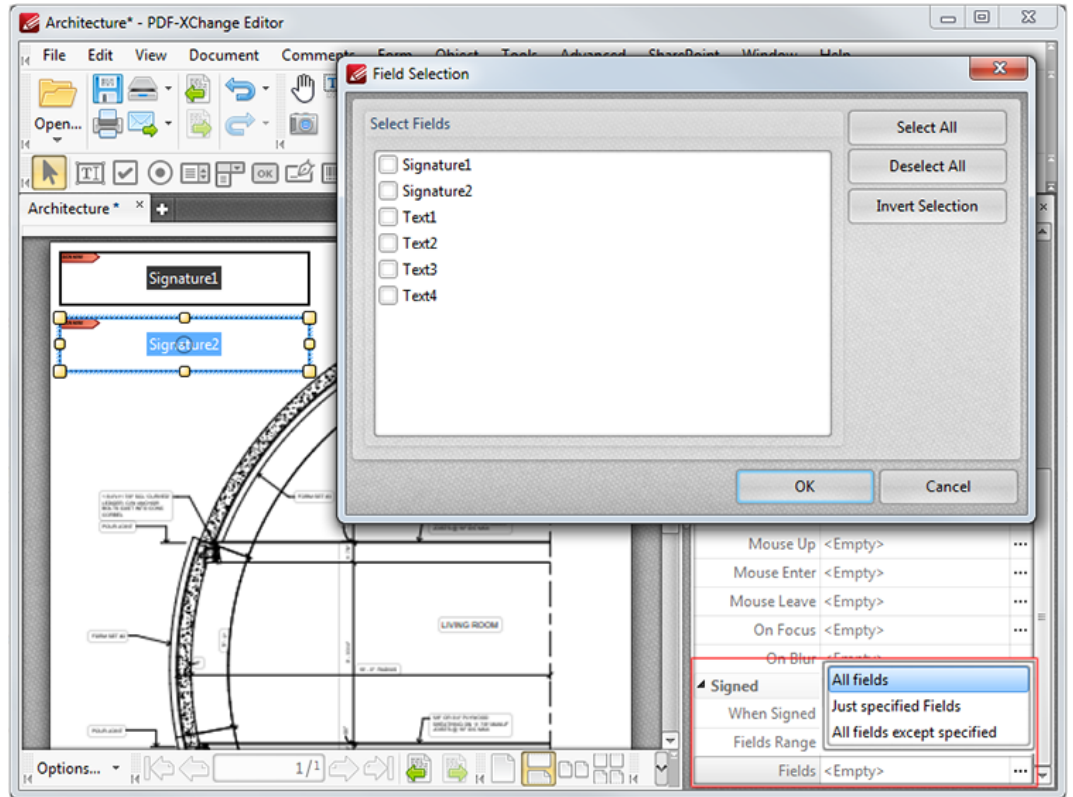
Figure 8. Mark as Read-Only Options

- Select **All fields** to set all fields in the document as read-only.
- Select **Just 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 **Field Selection** dialog box detailed in *(figure 8)* will open when an option to specify fields is used. 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 **Barcode** icon in the **Form Toolbar** (these locations are highlighted in the image below). The blue rectangle that represents the signature field will be displayed:
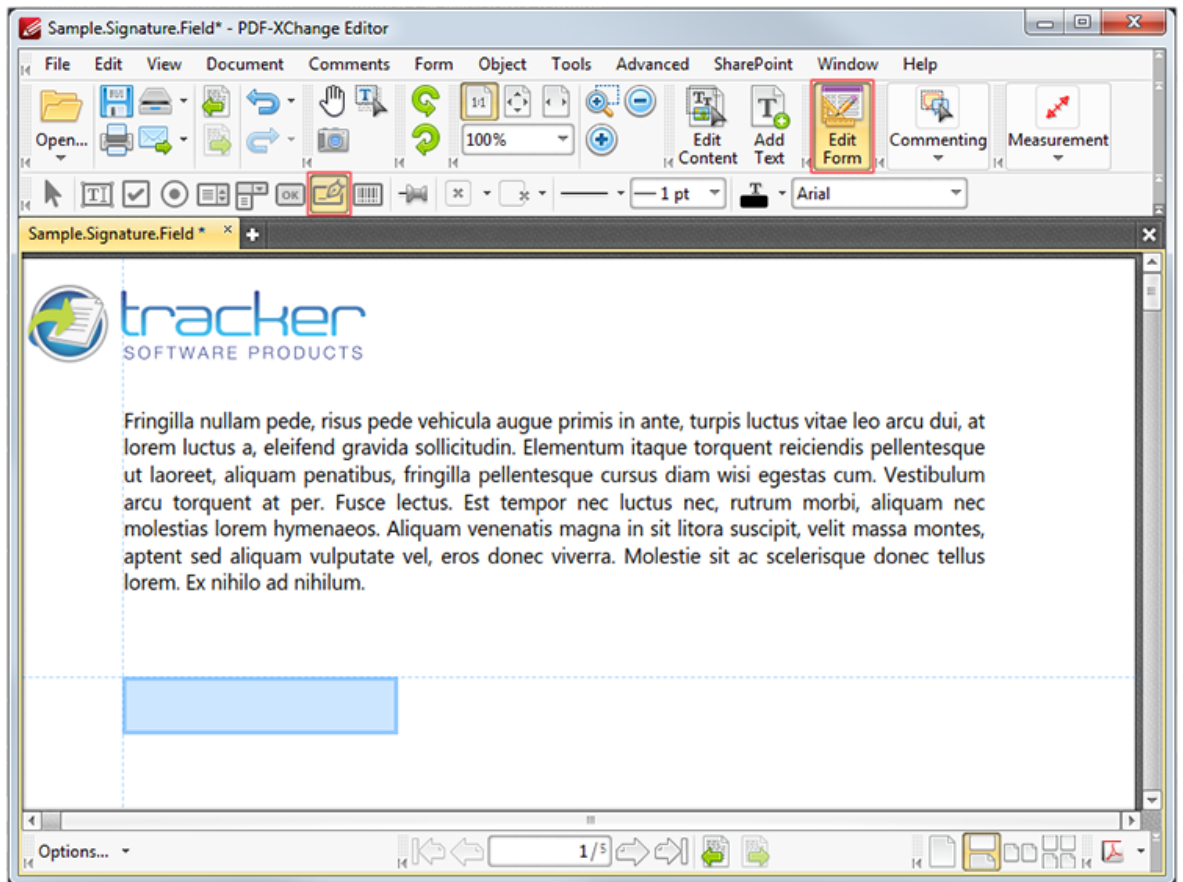
Figure 8. Active Barcode Tool

2. Click to add the signature field, then click **Properties** in the **Properties Toolbar** to open the **Widget Properties** pane:
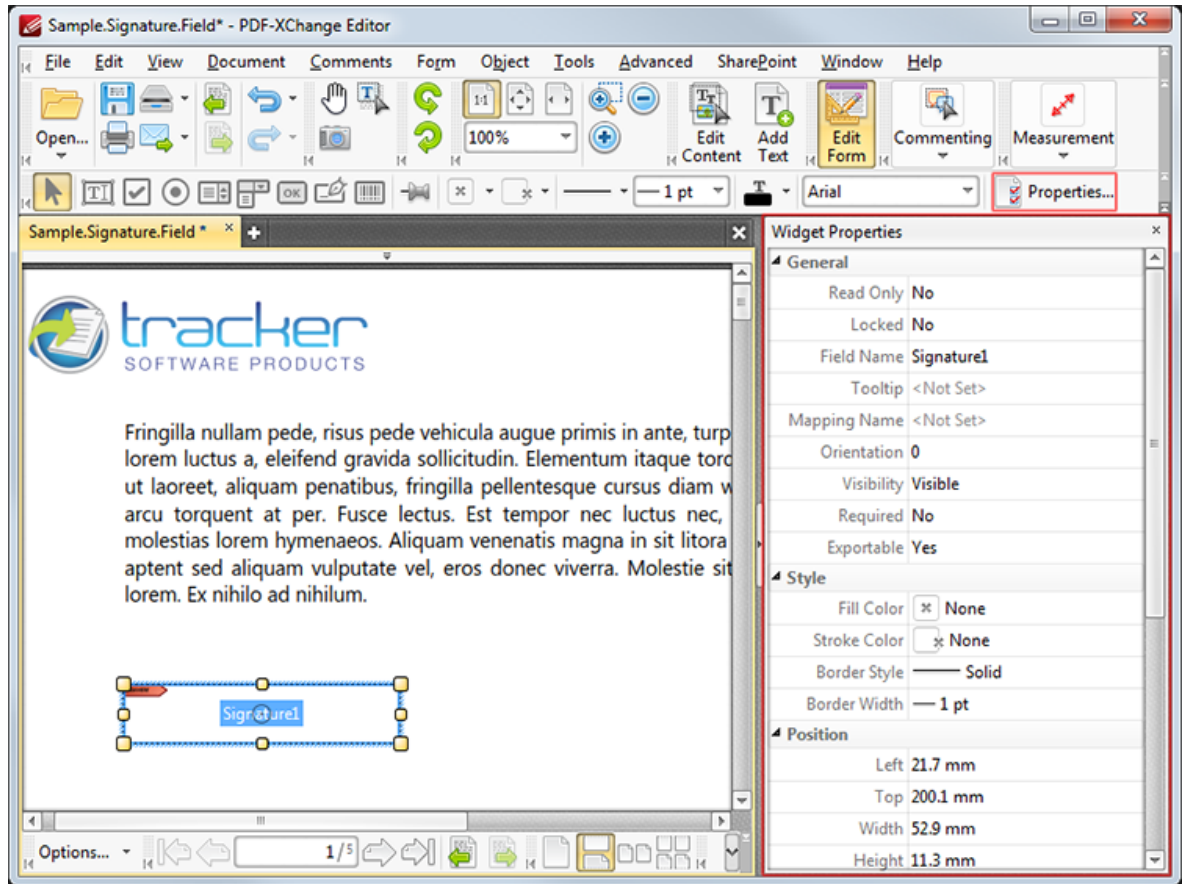
Figure 9. Active Button Tool, Widget Properties Pane

3. Click the **Tooltip** property in the **Widget Properties** pane and enter the desired text for the tooltip:
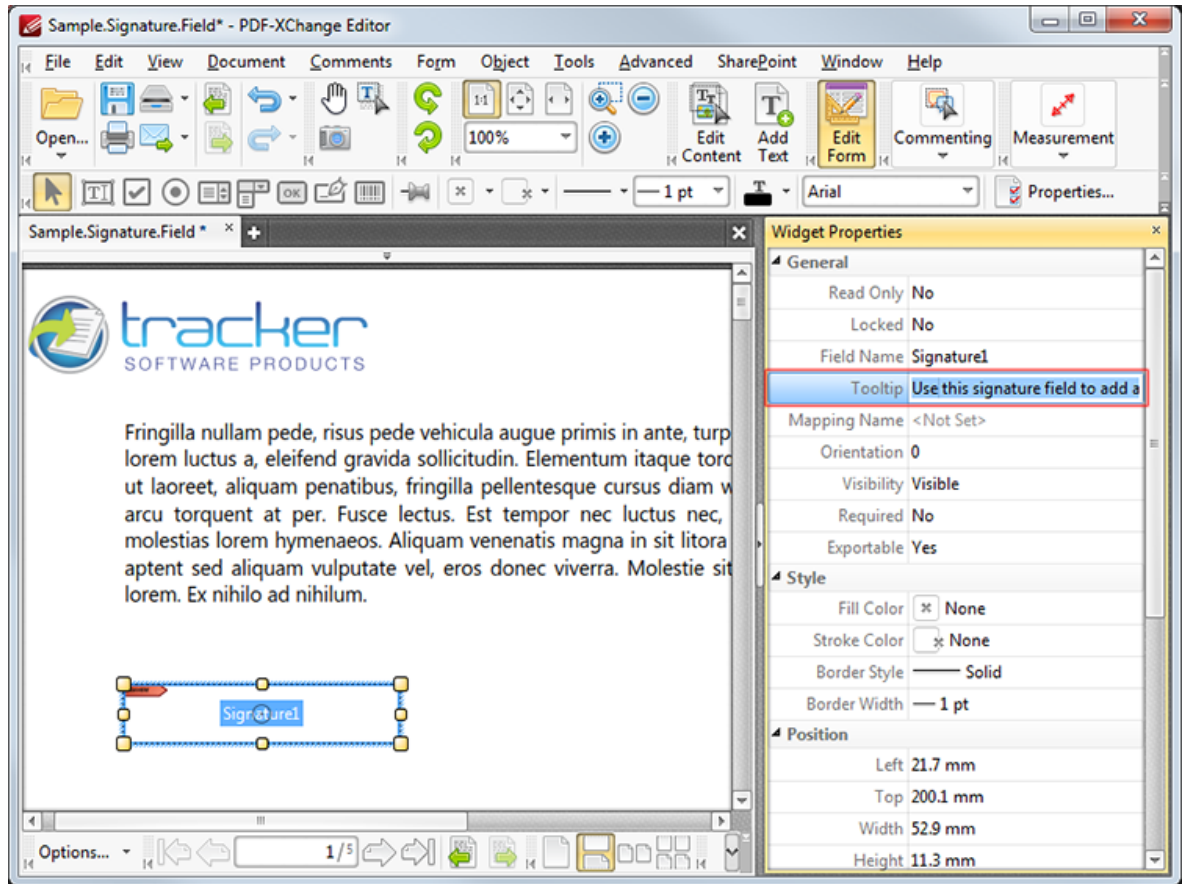
Figure 10. Widget Properties Pane, Tooltip Property

4. Scroll down the **Widget Properties** pane to the **Actions** properties and click the ellipsis icon on the right of the **Mouse Up** property:
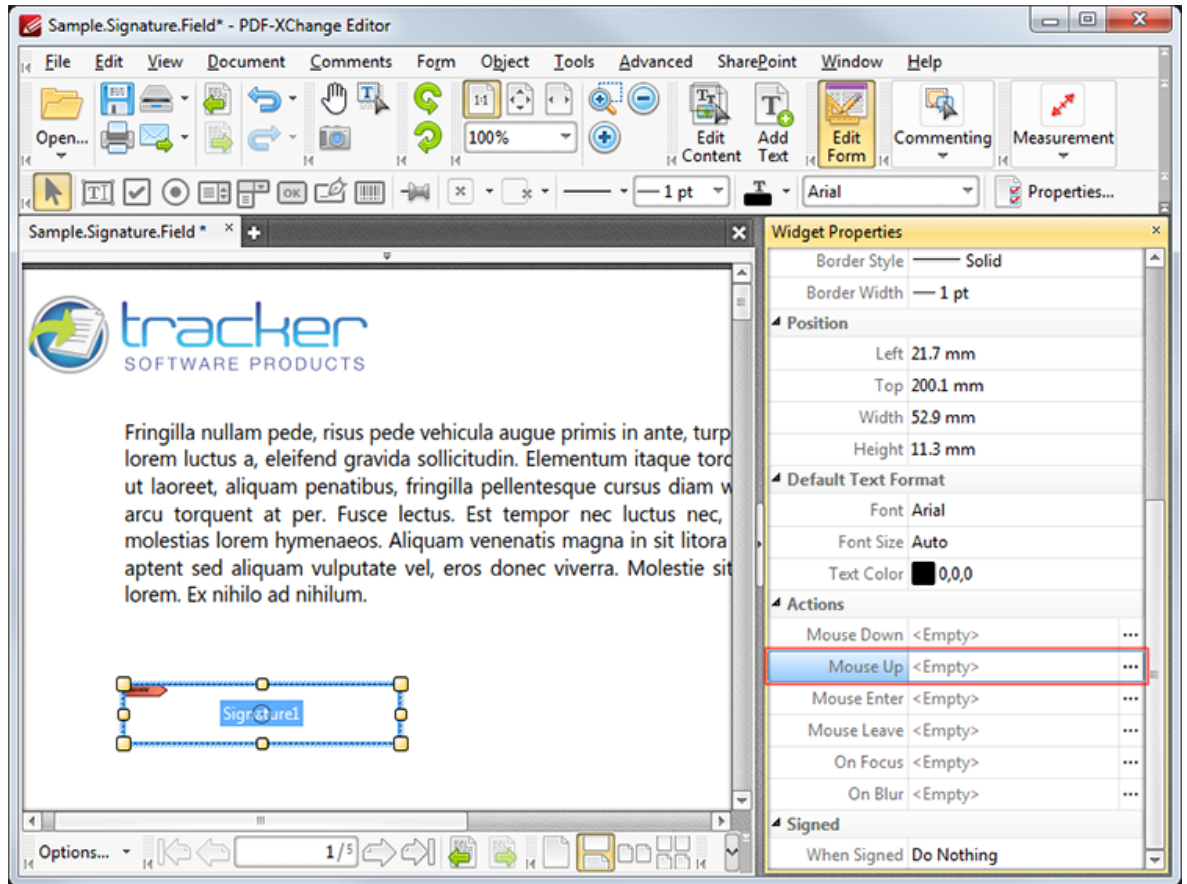
Figure 11. Widget Properties Pane, Mouse Up Property

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:
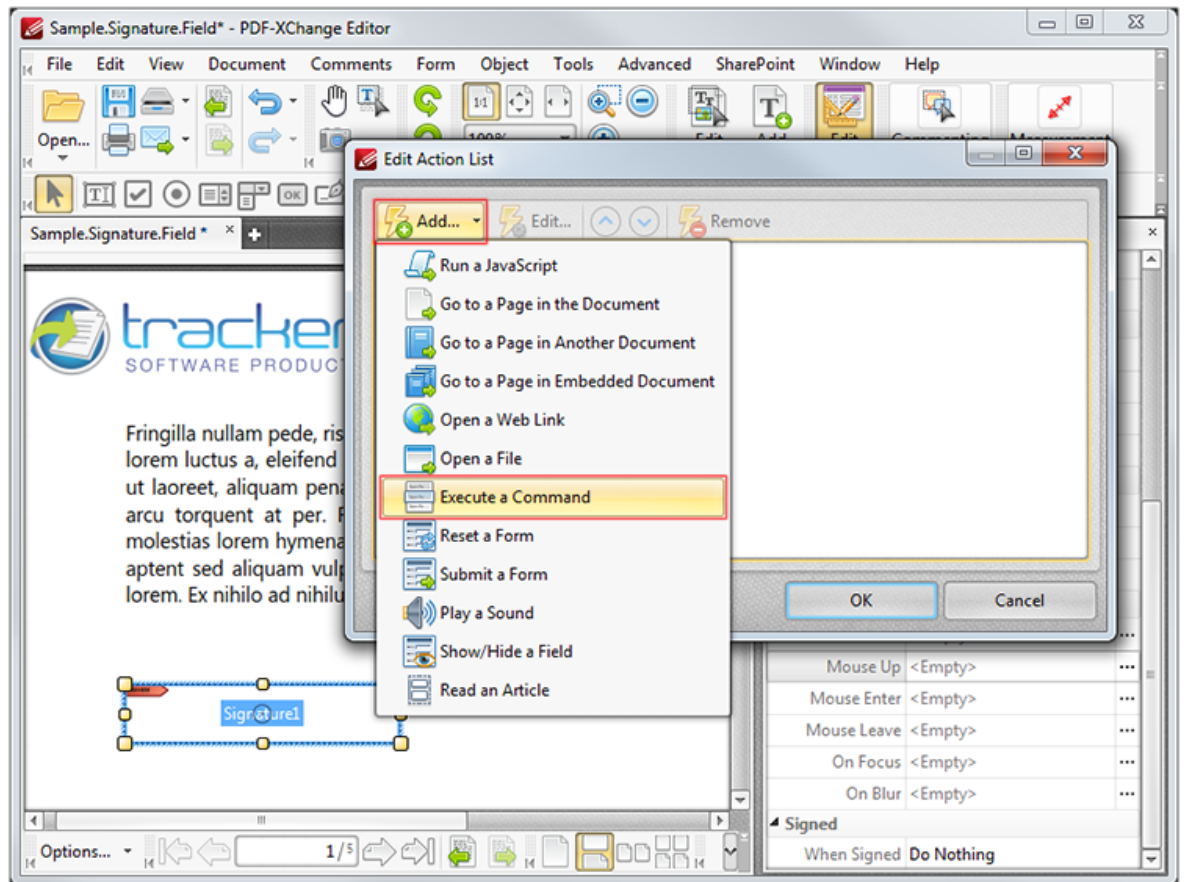
Figure 12. Edit Action Dialog Box, Execute a Command

The **Add Action: "Execute a Command"** dialog box will open.

6. Click the dropdown menu, then scroll down to and click the **NewBookmark** command:
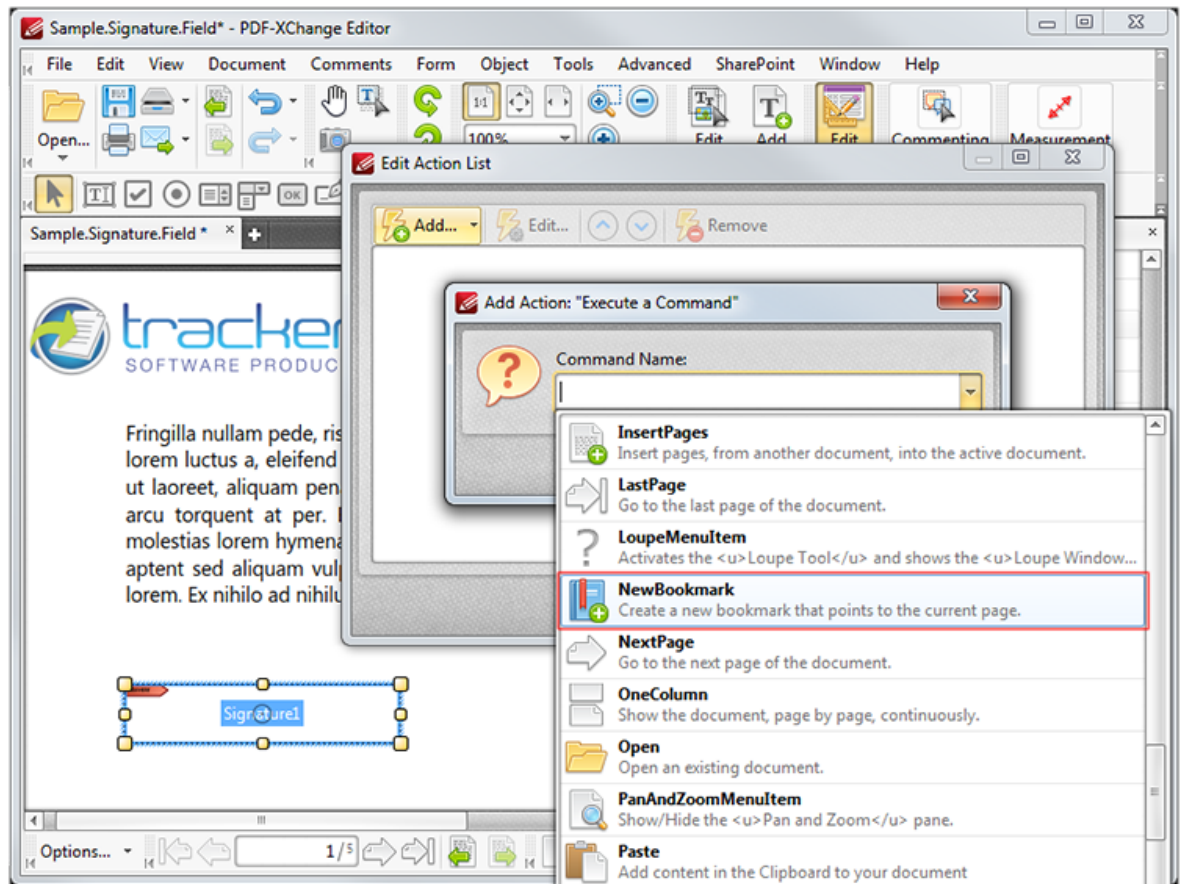
Figure 13. New Bookmark Command

7. Click **OK** in both open dialog boxes:
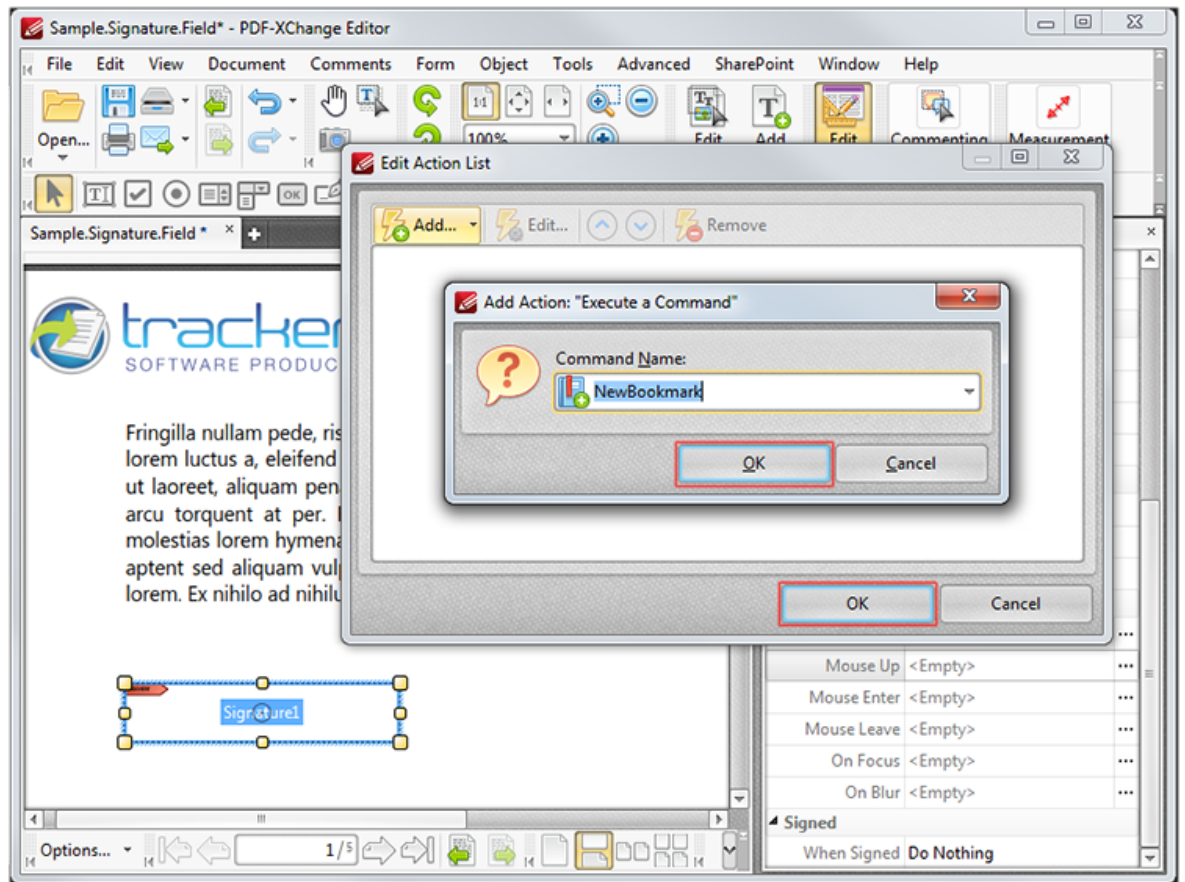
Figure 14. Open Dialog Boxes

The signature field is then complete. The tooltip entered at step three will be present when the pointer is hovered over the signature field:
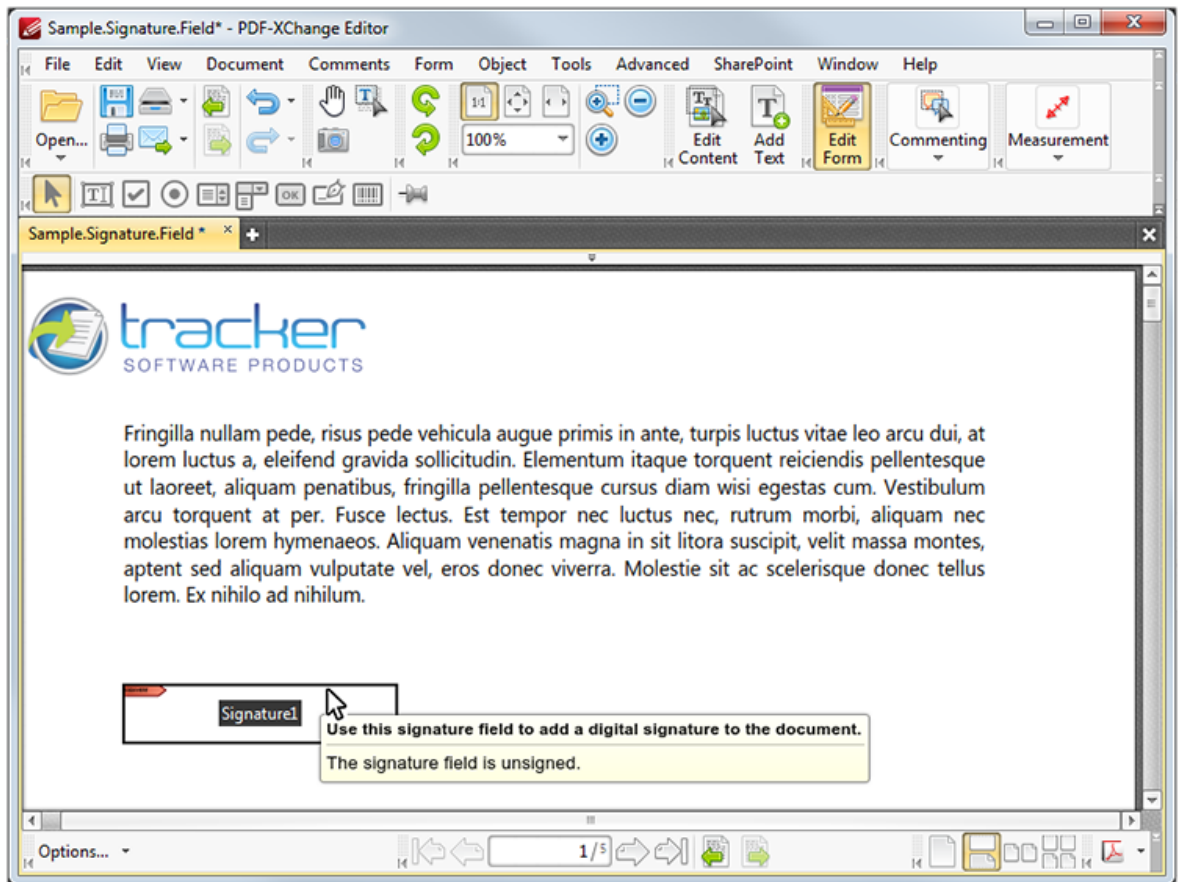
Figure 15. Active Tooltip

A new bookmark is created for the current page when the signature field is clicked:
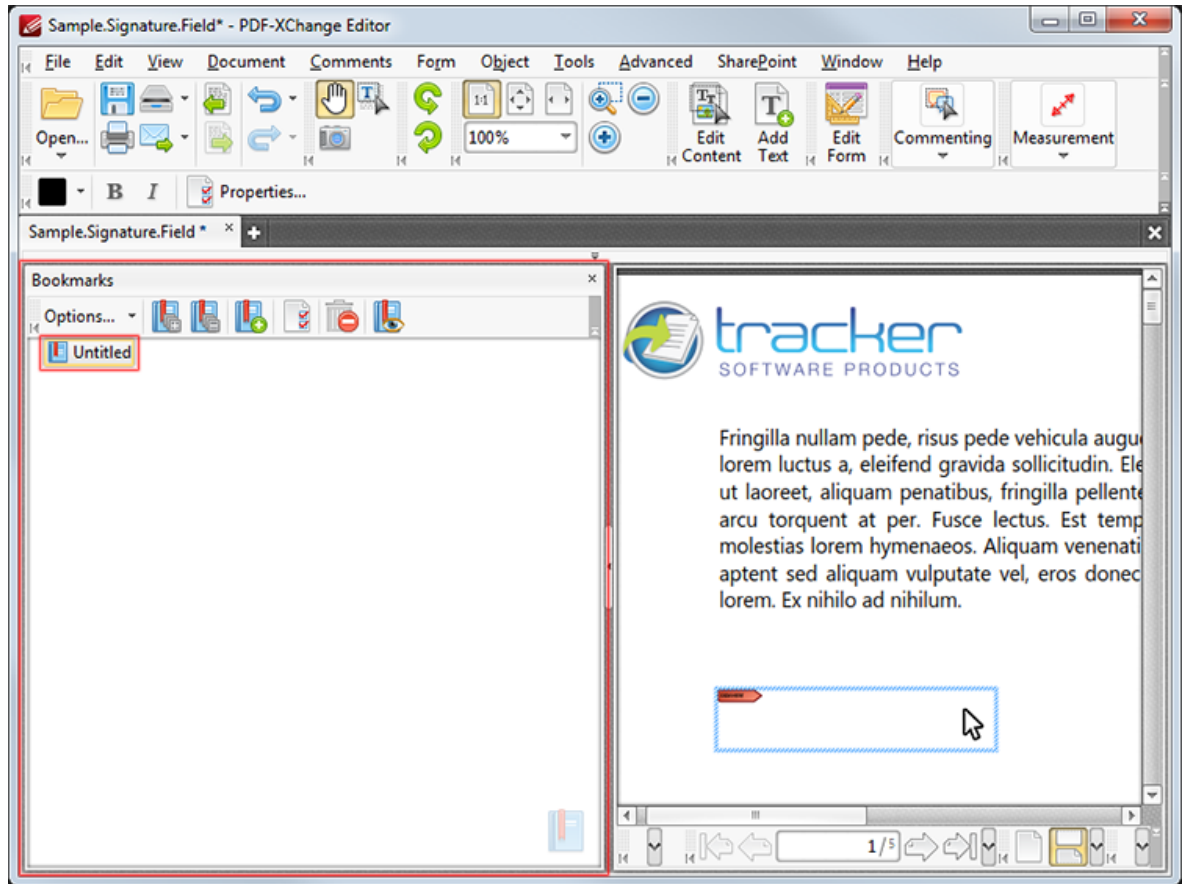
Figure 16. New Bookmark Created

6.3.1.7.8 Add Barcodes to Documents

Add Barcodes to Documents

Barcodes enable the encoding of form data and display as detailed below:
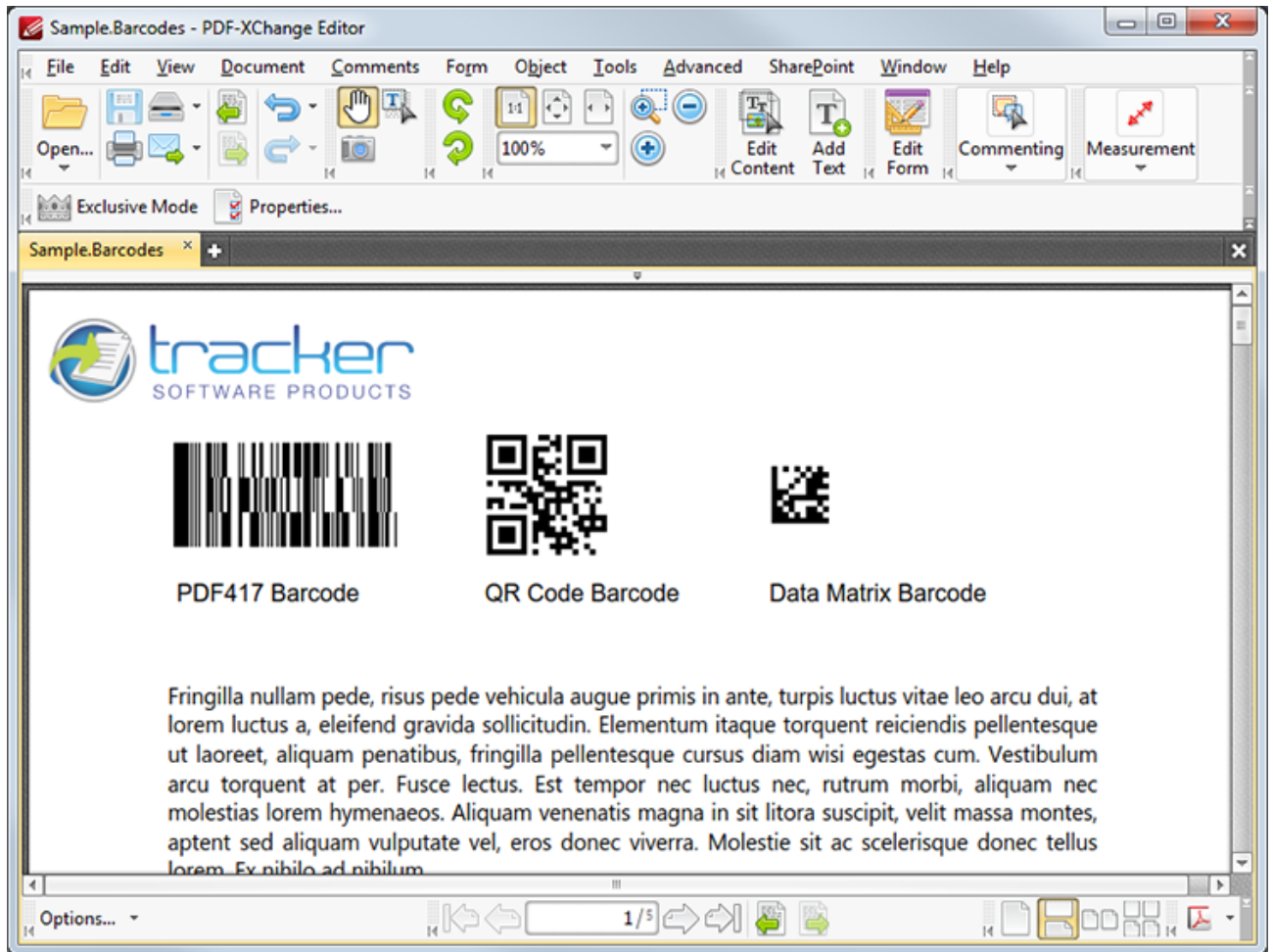
Figure 1. Example Barcodes

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:
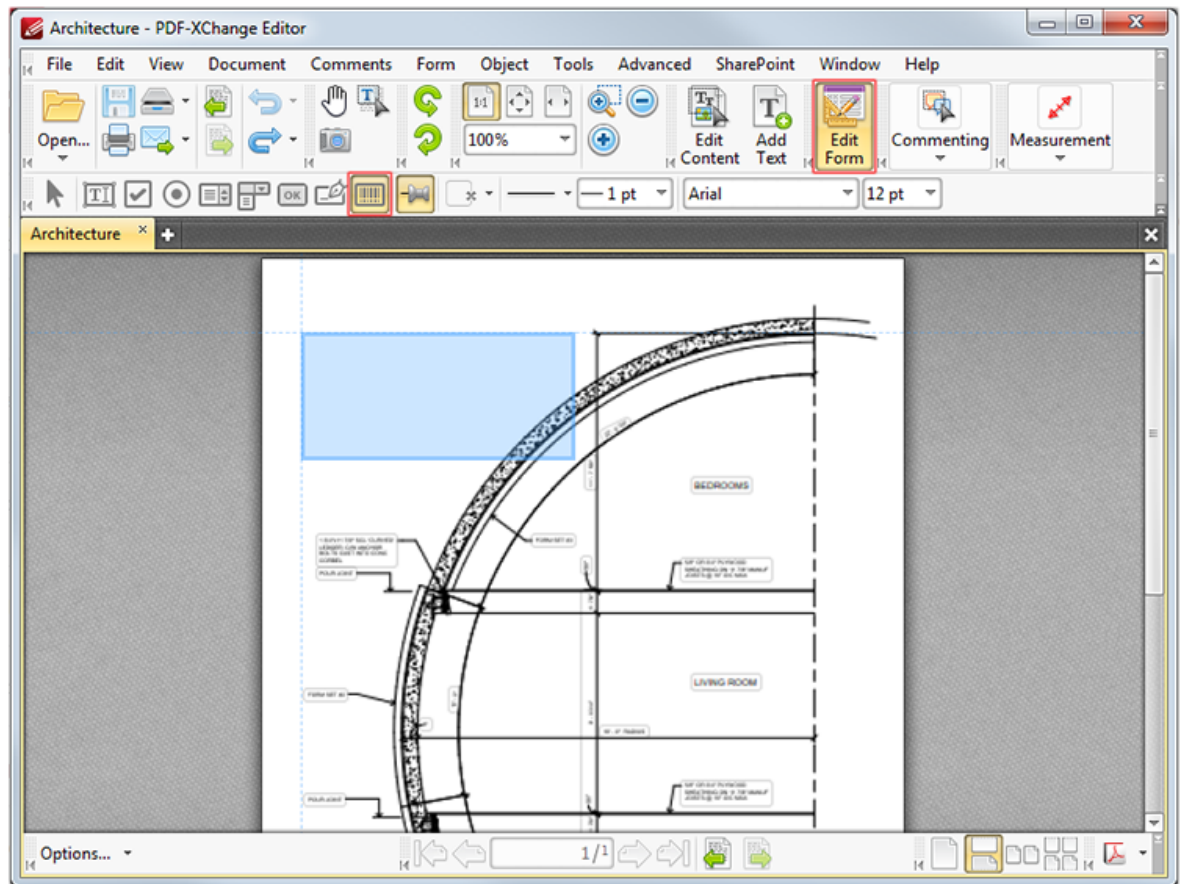
Figure 2. Active Barcode Tool

2. Move the rectangle to the desired location and then click to add the barcode to the document. (Use the editing aids detailed **here** [525] to assist in the precise placement of barcodes). Added barcodes appear as below:
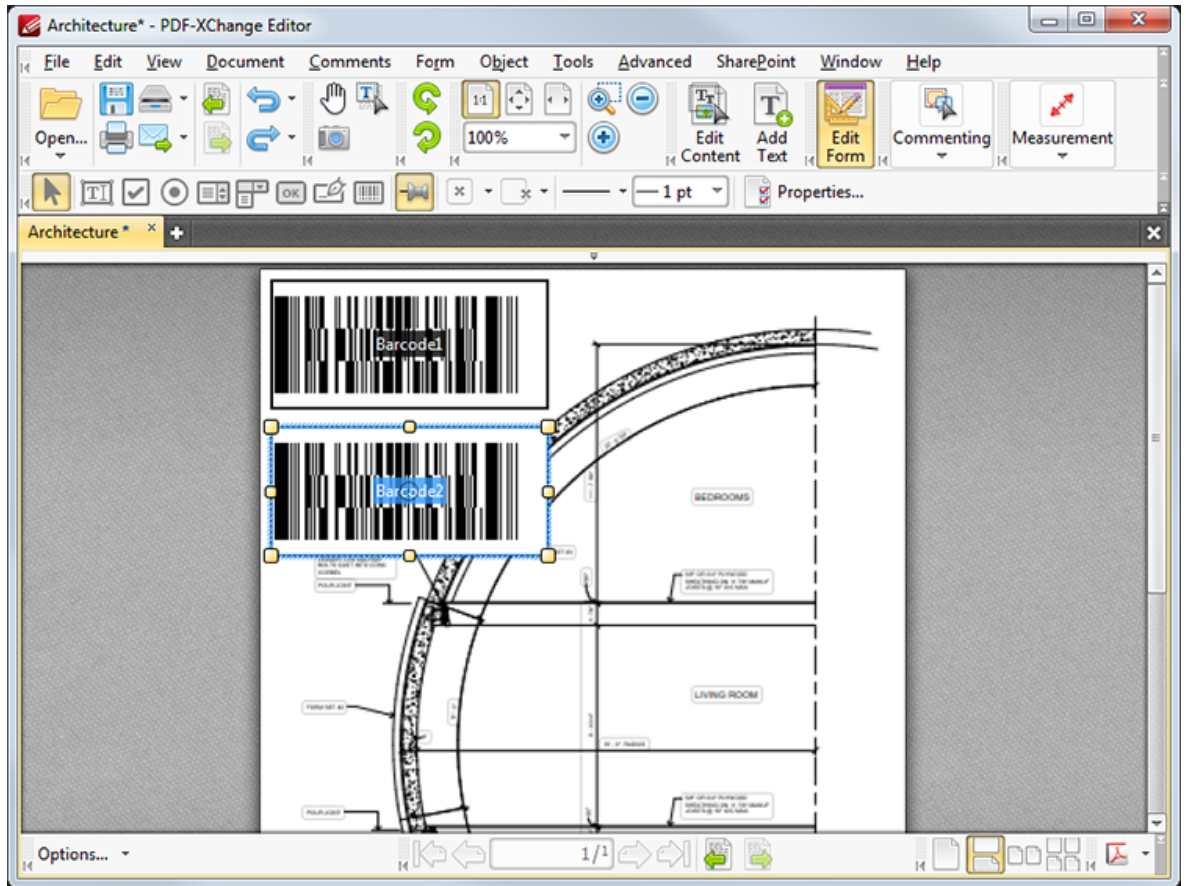
Figure 3. Added Barcodes

- Click and drag the yellow control points to resize barcodes.
- Use the options in the **Properties Toolbar** [484] 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 **Widget Properties** pane, which enables the customization of additional elements of barcodes.

▼ **The Widget Properties Pane**
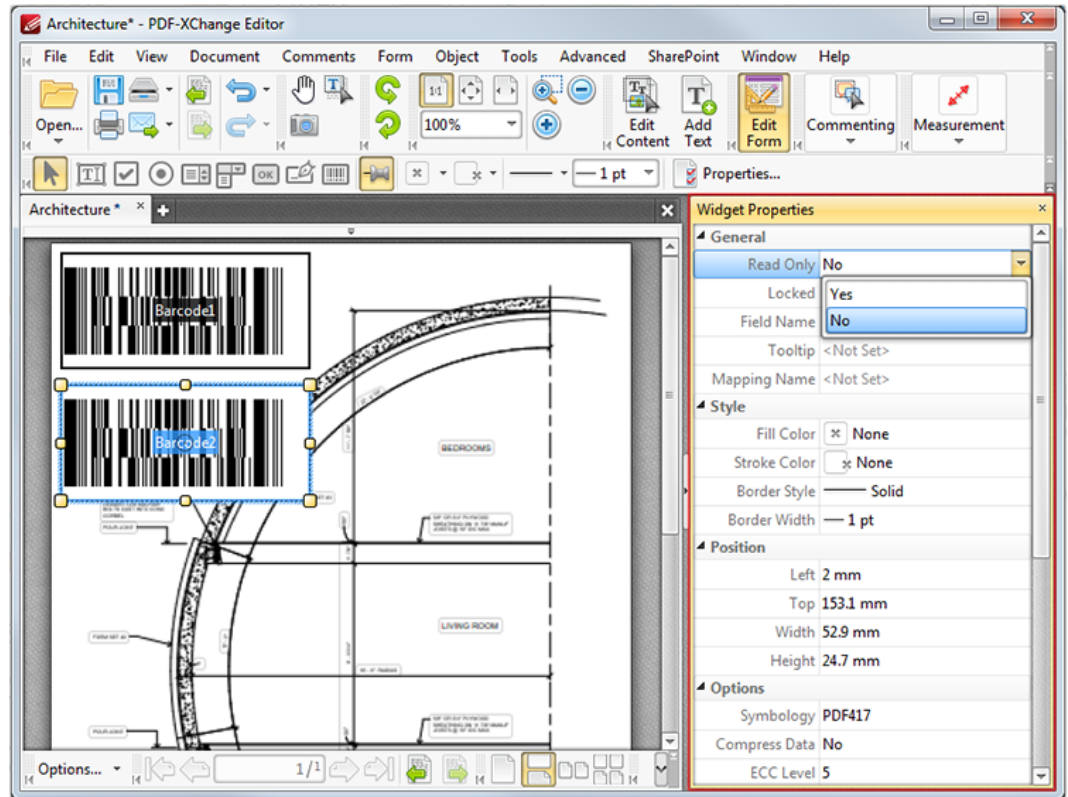
Figure 4. Barcode Tool, Widget Properties Pane

The **Widget 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.** 519
- **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.

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 **Widget 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:**
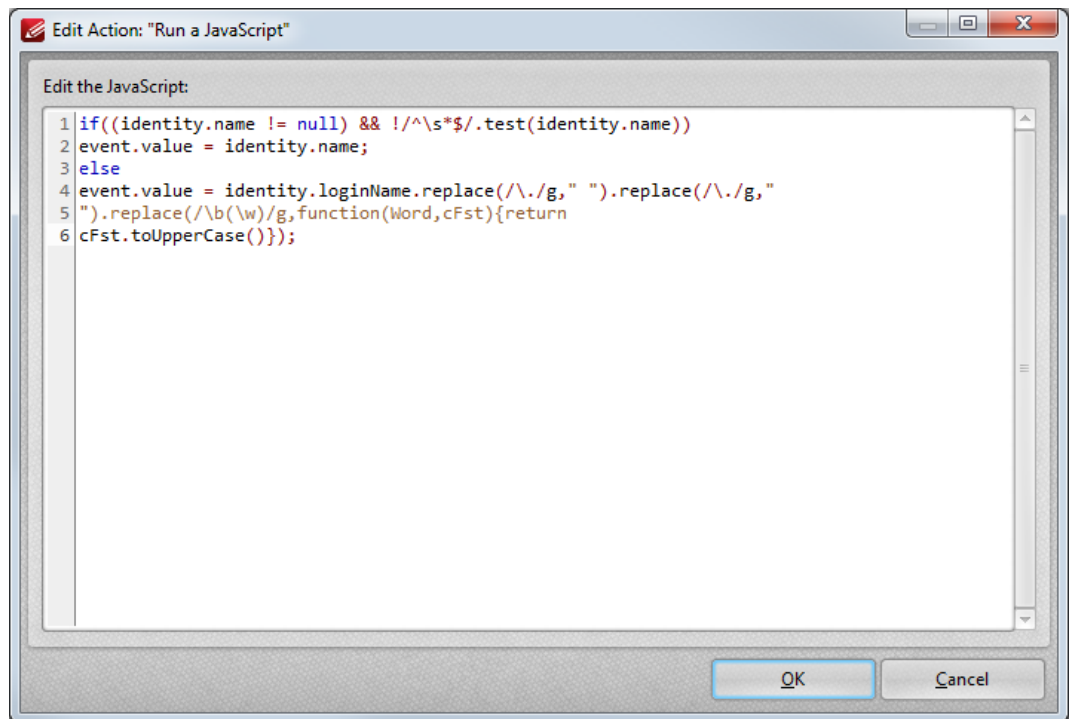
Figure 5. Edit Action: "Run a JavaScript" Dialog Box

- **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 in the barcode and click **OK:**
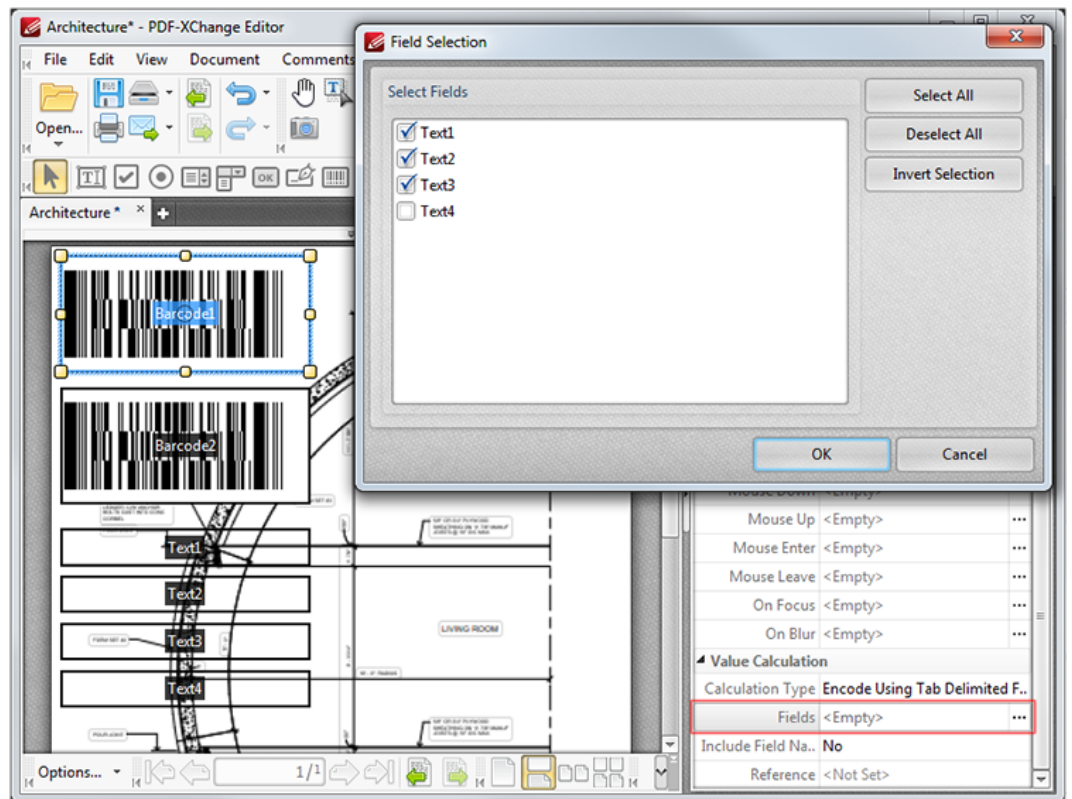
Figure 6. Encode Using Tab Delimited Format, Fields Property Highlighted and Field Selection Dialog Box

- **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 in the barcode and click **OK:**
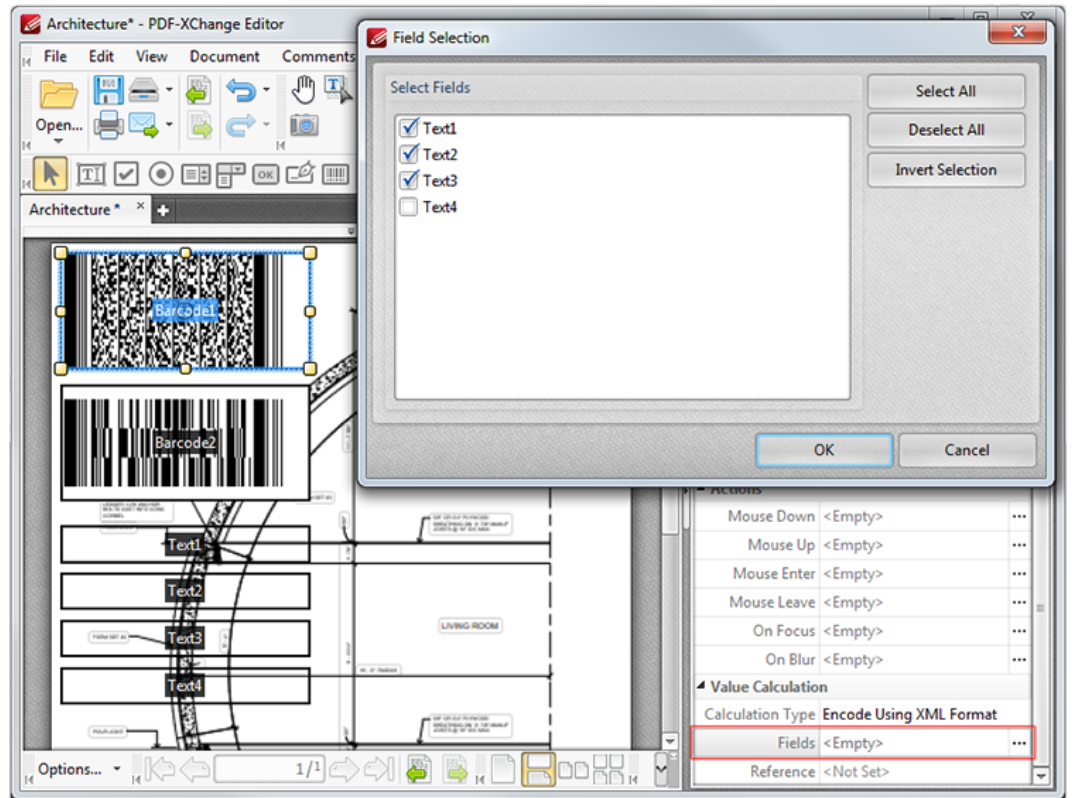
Figure 7. Encode Using XML Format, Fields Property Highlighted and Field Selection Dialog Box

- **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:
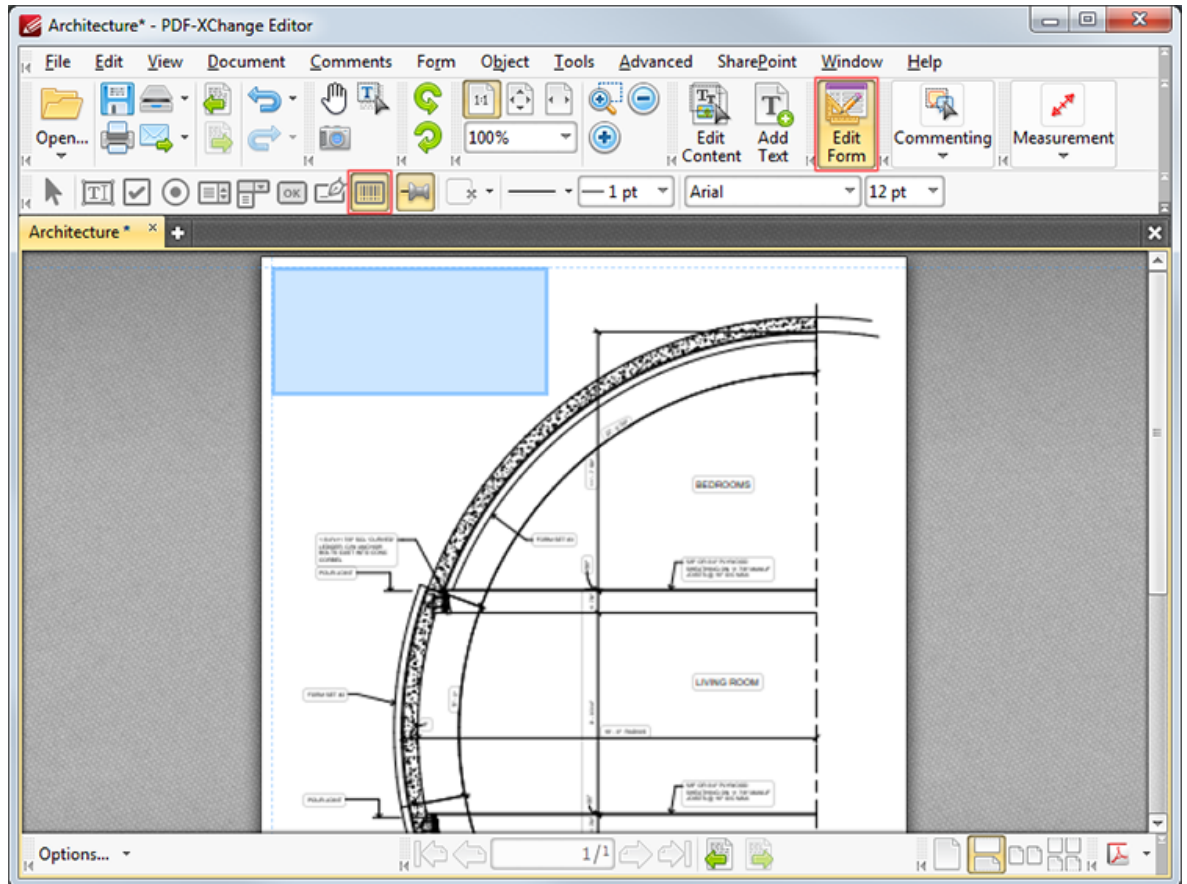
Figure 8. Active Barcode Tool

2. Click to add the barcode, then click **Properties** in the **Properties Toolbar** to open the **Widget Properties** pane:
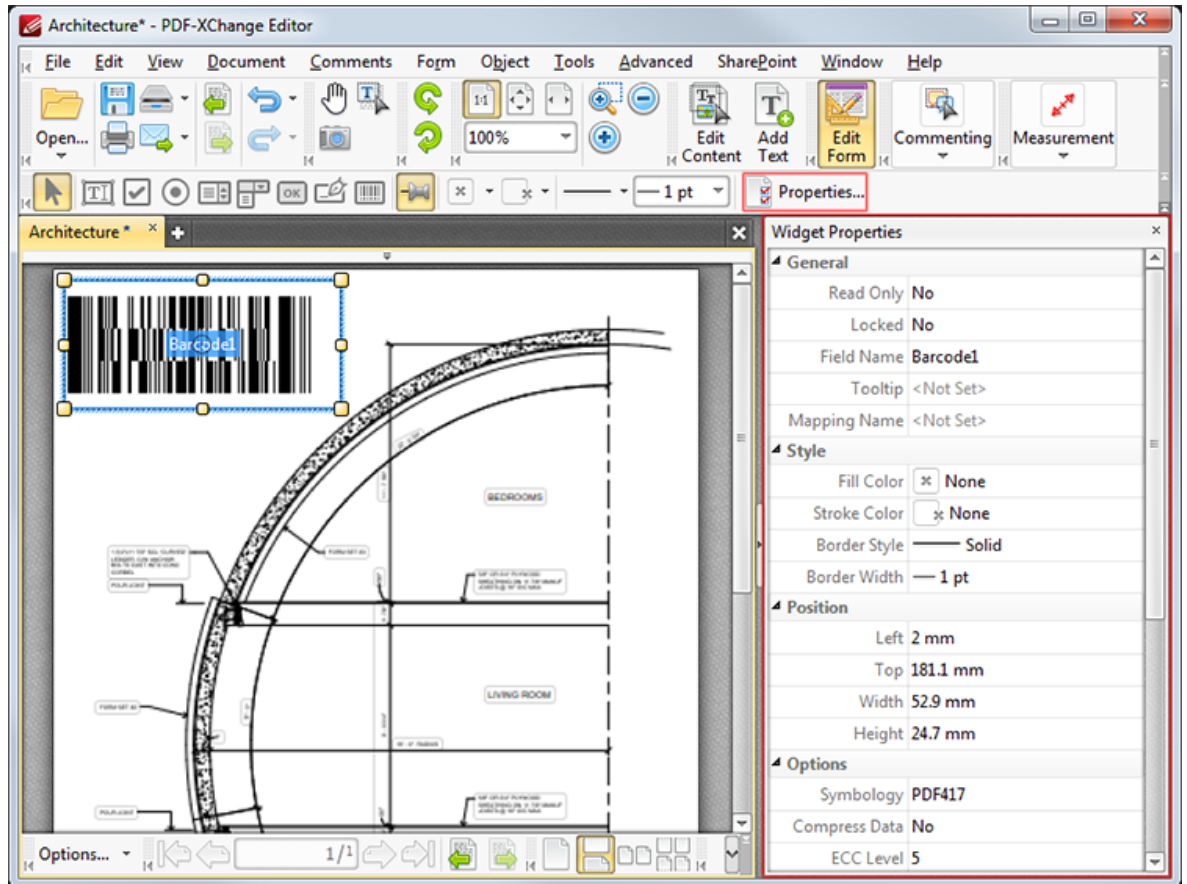
Figure 9. Active Button Tool, Widget Properties Pane

3. Scroll down the **Widget Properties** pane to the **Calculation Type** property, then select **Encode Using Tab Delimited Format:**
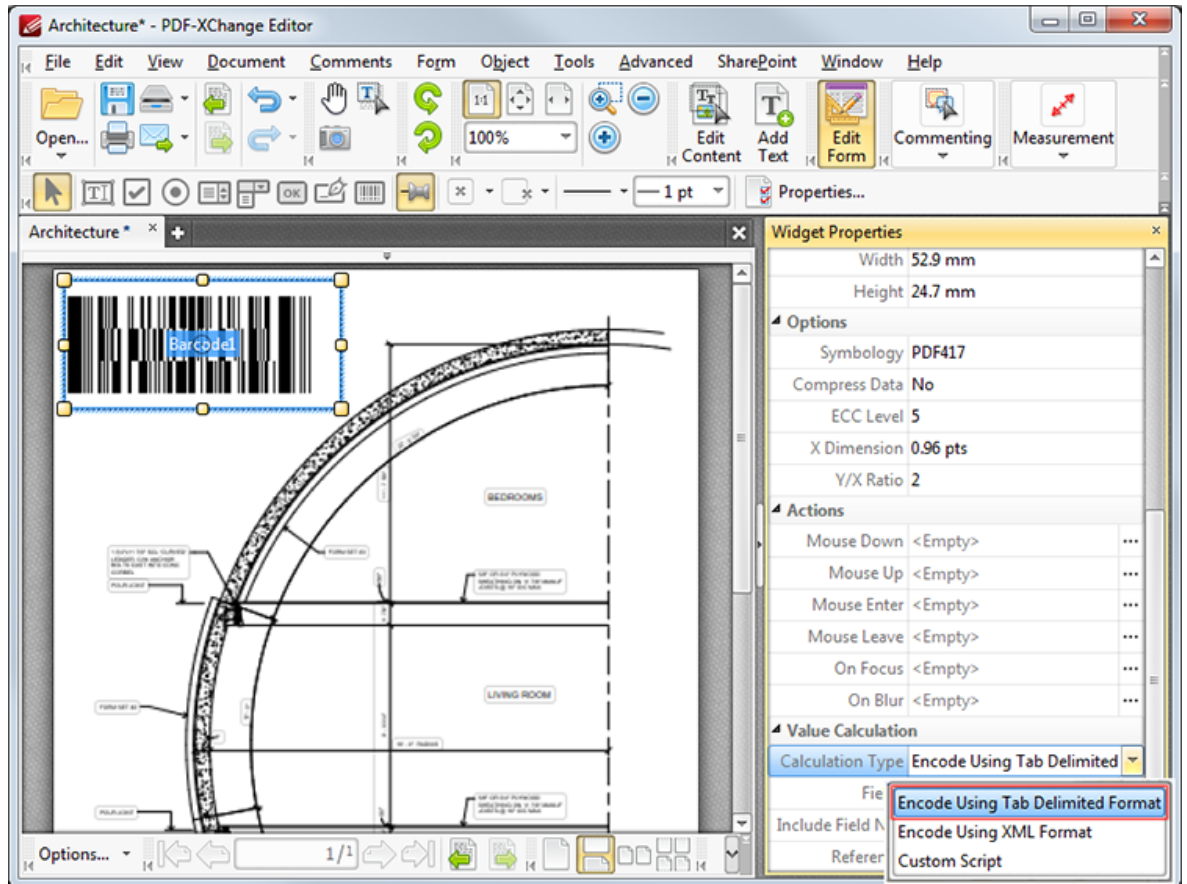
Figure 10. Calculation Type Property, Encode Using Tab Delimited Format

The next step is to create the form fields from which the barcode will gather 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:
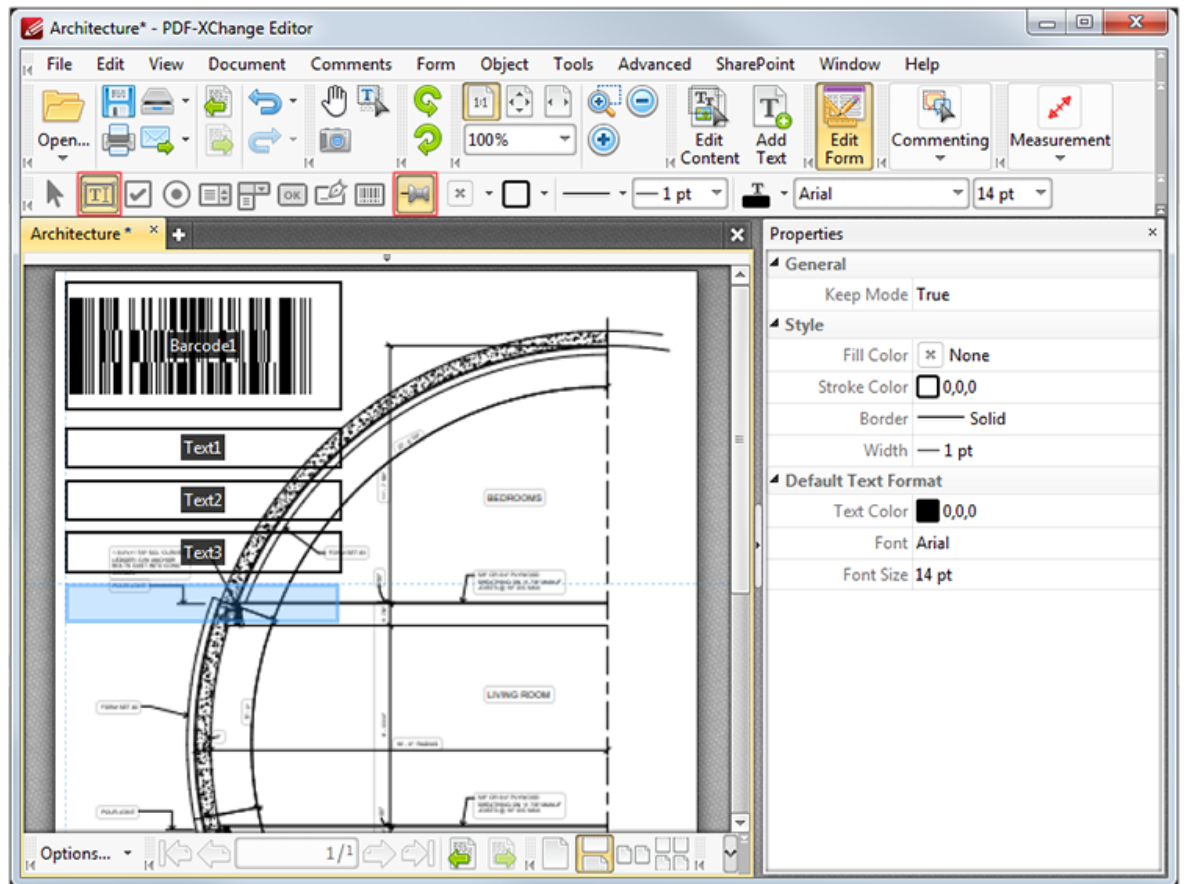
Figure 11. New Text Boxes

5. Click the **Hand Tool** (highlighted in the image below), then click to select the text fields one at a time and enter some numerical data:
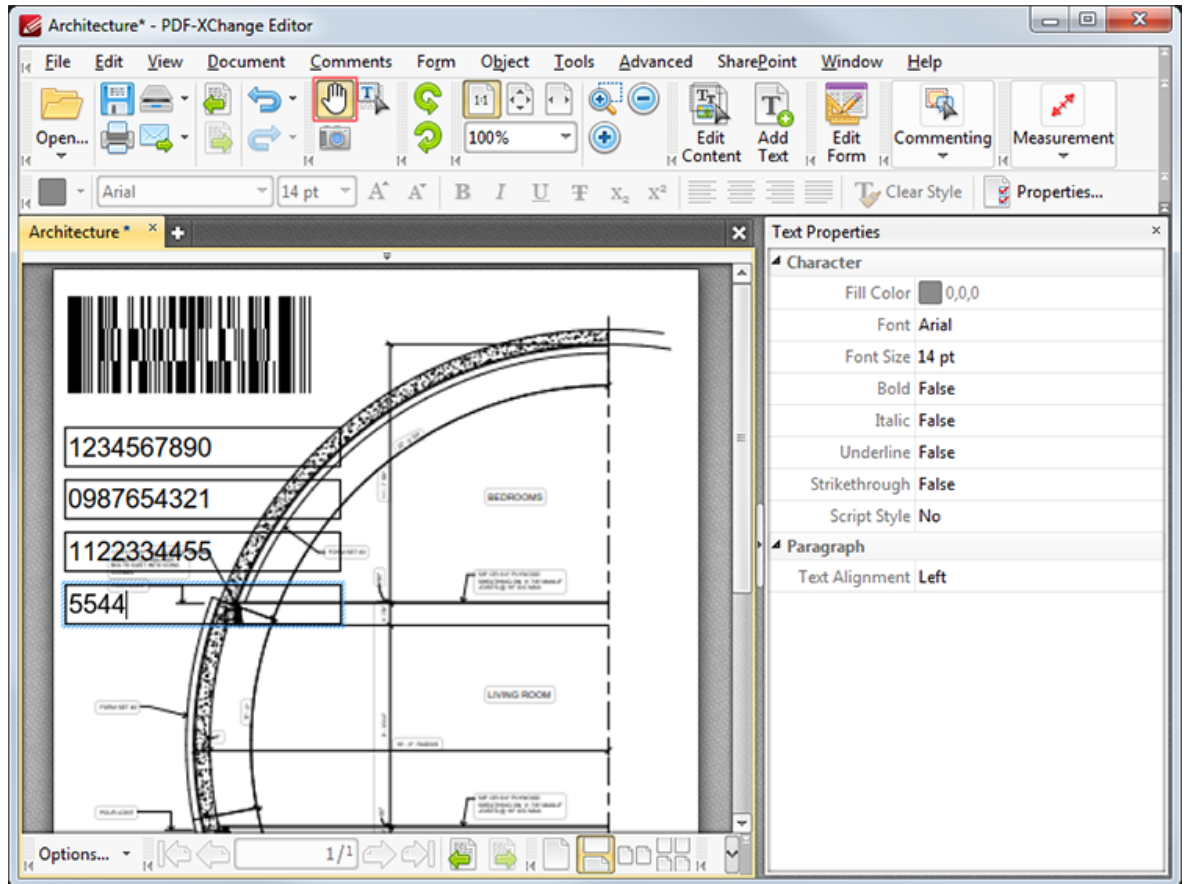
Figure 12. Active Hand Tool

6. Click **Edit Form,** then click **Select Fields** in the **Form Toolbar,** (these locations are highlighted in the image below) and click the barcode to select it:
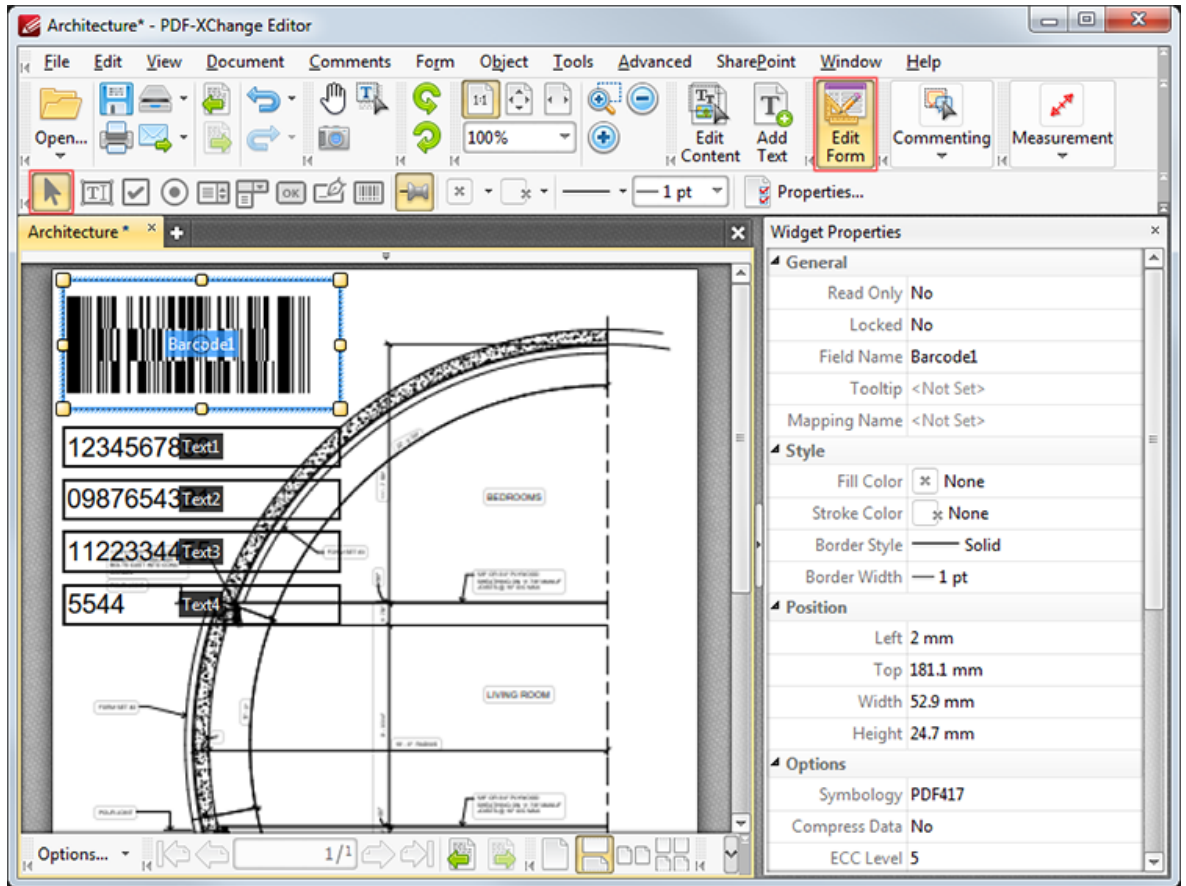
Figure 13. Selected Barcode

7. Scroll down the **Widget 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:**
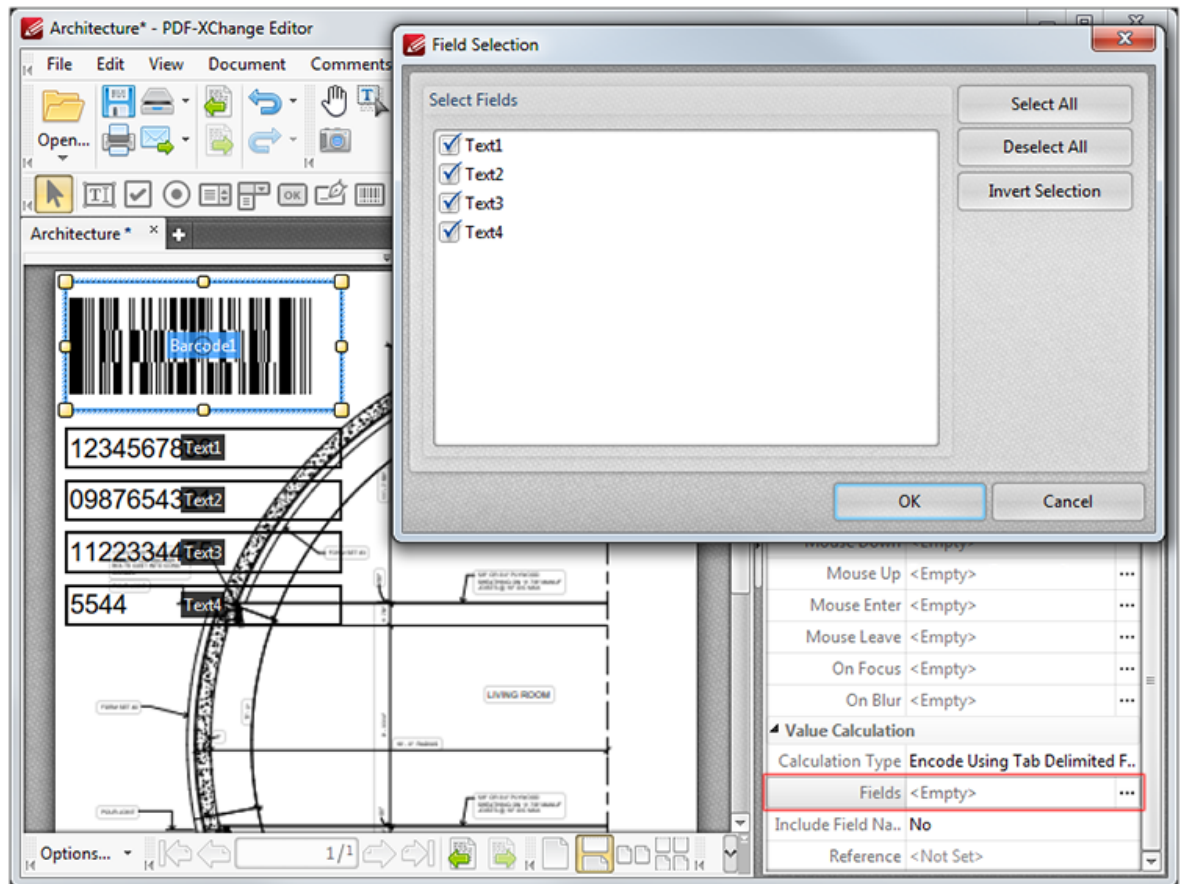
Figure 14. Selected Barcode and Field Selection Dialog Box

The barcode will update to represent the information:
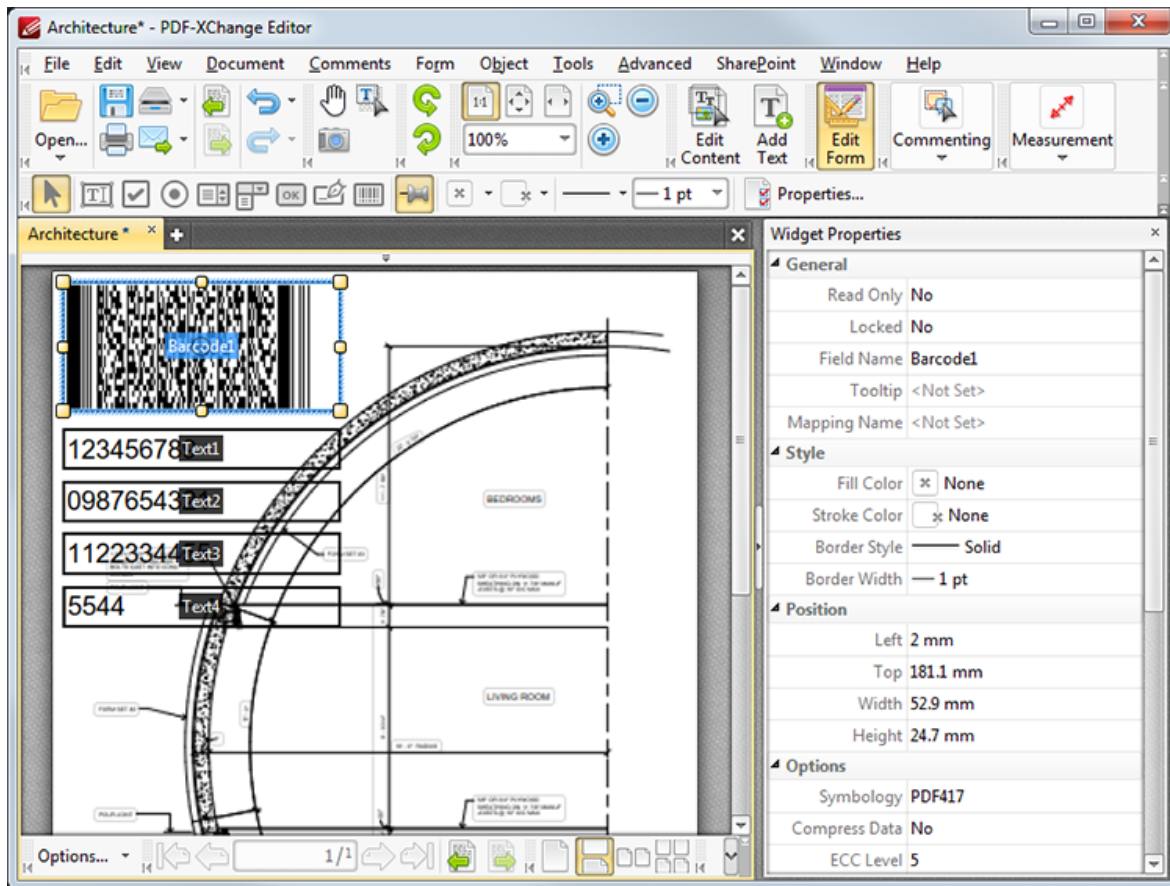
Figure 15. Updated Barcode

If the content of the text fields used to create the barcode is updated then the barcode will update to represent the new information.

6.3.1.8   Commenting Toolbar

Commenting Toolbar

The **Commenting Toolbar** contains options for editing and adding comments to documents. Click **Commenting** to view the following options:
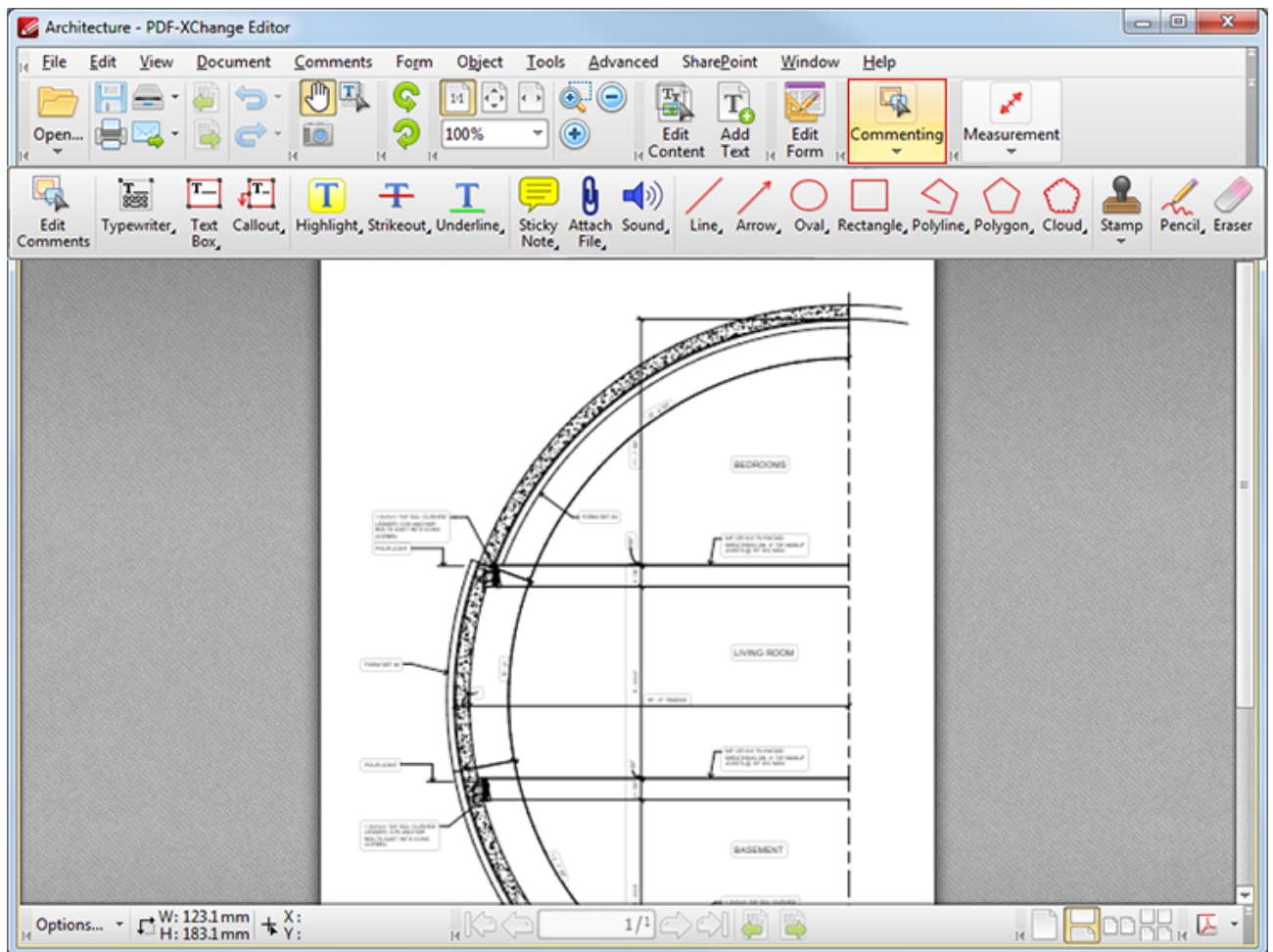
Figure 1. Commenting Toolbar

 The **Edit Comments** tool is used to edit comments. See **here** ⌐661⌐ for further information.

The **Typewriter** tool is used to create typewriter comments. See **here** 667 for further information.

The **Text Box** tool is used to create text boxes. See **here** 670 for further information.

The **Callout** tool is used to create callout annotations. See **here** 673 for further information.

The **Highlight Text** tool is used to highlight text. See **here** 677 for further information.

The **Strikeout** tool is used to strike out text. See **here** 680 for further information.

The **Underline** tool is used to underline text. See **here** 683 for further information.

The **Sticky Note** tool is used to create sticky note annotations. See **here** 664 for further information.

The **Attach File** tool is used to create links to documents. See **here** 717 for further information.

The **Sound** tool is used to add audio files to the active document. See **here** 720 for further information.

The **Line** tool is used to create line annotations. See **here** 686 for further information.

The **Arrow** tool is used to create arrow annotations. See **here** 686 for further information.

The **Oval** tool is used to create oval annotations. See **here** 692 for further information.

The **Rectangle** tool is used to create rectangle annotations. See **here** 689 for further information.

The **Polyline** tool is used to create polyline annotations. See **here** 695 for further information.

The **Polygon** tool is used to create polygon annotations. See **here** 698 for further information.

The **Cloud** tool is used to create cloud annotations. See **here** 701 for further information.

The **Stamp** tool is used to place stamps. See **here** 704 for further information.

The **Pencil** tool is used to create freehand lines. See **here** 714 for further information.

The **Eraser** tool is used to remove **Pencil** tool lines. See **here** 714 for further information.

6.3.1.9   Measurement Toolbar

Measurement Toolbar

The **Measurement Toolbar** contains options for measuring specific elements of documents:
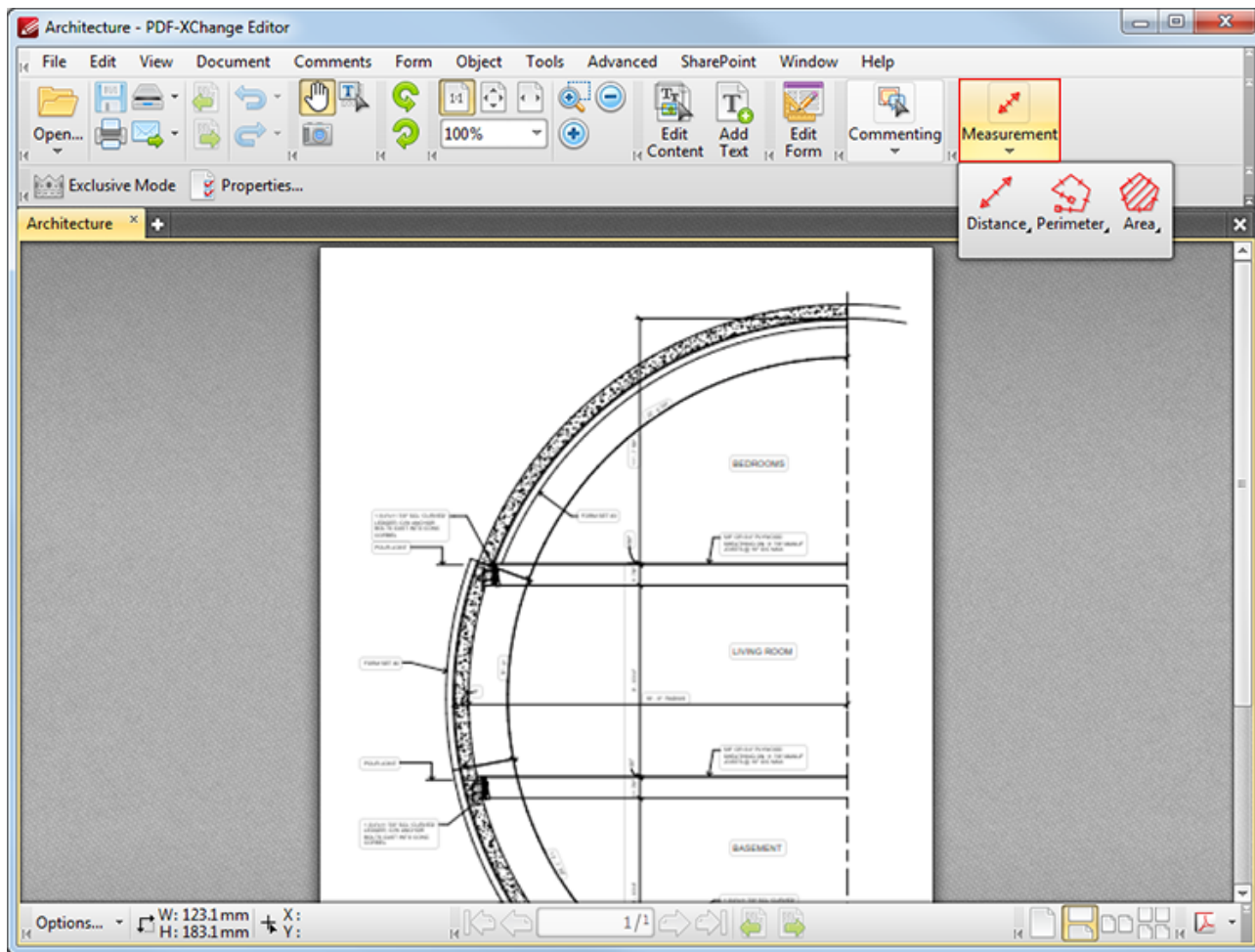
Figure 1. Measurement Toolbar

Click the icon to view available options. They are detailed below:

The **Distance Tool** is used to measure the distance between two points. See <u>**here**</u>⏐725⏐ for further details.

The **Perimeter Tool** is used to measure the distance between multiple points. See <u>**here**</u>⏐728⏐ for further details.

The **Area Tool** is used to measure the area within designated lines. See <u>**here**</u>⏐731⏐ for further details.

6.3.1.10 Document Options Toolbar

 Document Options Toolbar

The **Document Options Toolbar** is located in the lower left corner of the main window:
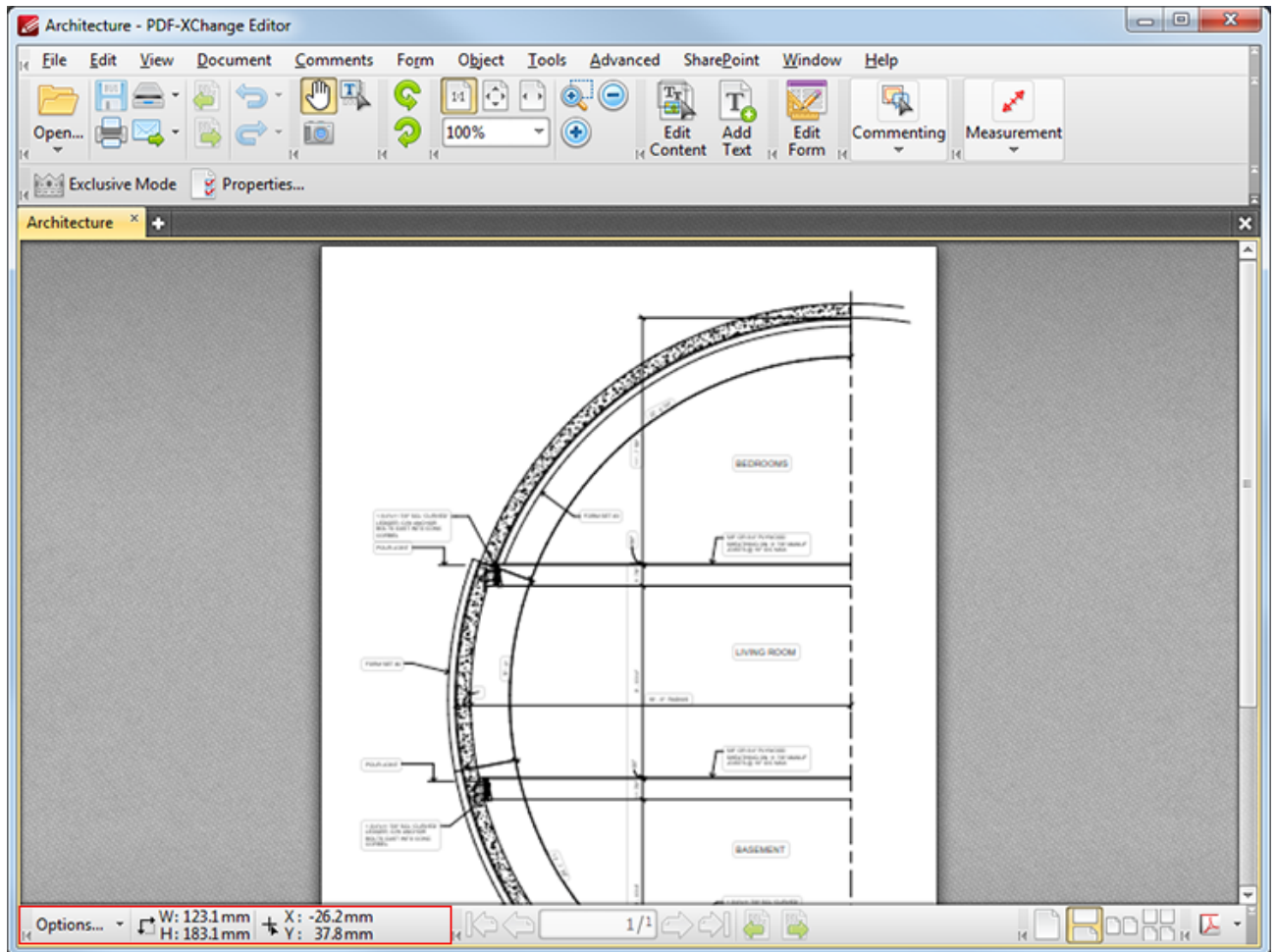
Figure 1. Document Options Toolbar

- Click the **Options** icon to access the options detailed in *(figure 2)* below.
- There are two sets of dimensions displayed on the right of the toolbar. This is the **Page Measurement Info.** The dimensions of the document over which the pointer is located are

shown on the left. The coordinates of the pointer in relation to the document are shown on the right.
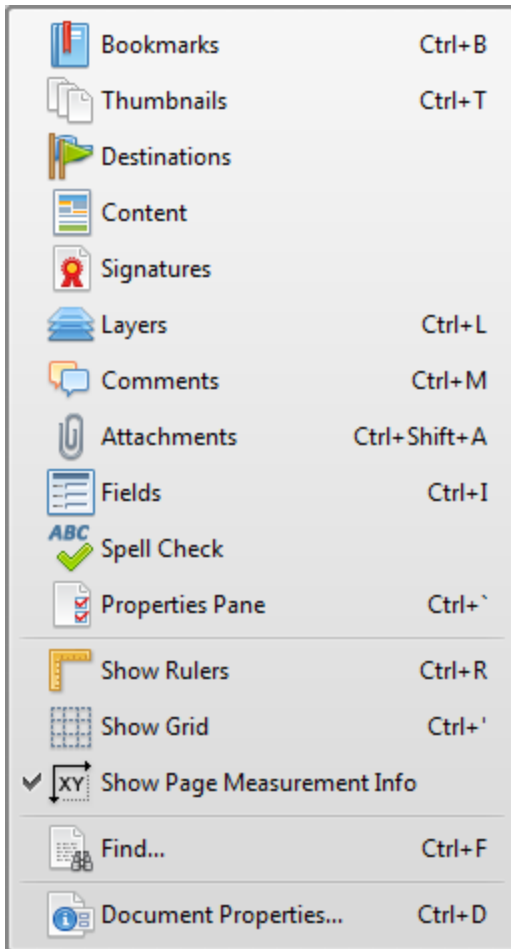
Figure 2. Document Options Menu

- Click **Bookmarks** to open the **Bookmarks** pane, which is explained **here.** [493]
- Click **Thumbnails** to open the **Tumbnails** pane, which is explained **here** [497] **.** [497]
- Click **Destinations** to open the **Destinations** pane, which is explained **here.** [503]
- Click **Content** to open the **Content** pane, which is explained **here.** [505]
- Click **Signatures** to open the **Signatures** pane, which is explained **here.** [597]
- Click **Layers** to open the **Layers** pane, which is explained **here.** [511]
- Click **Comments** to open the **Comments** pane, which is explained **here.** [514]
- Click **Attachments** to open the **Attachments** pane, which is explained **here.** [517]
- Click **Fields** to open the **Fields** pane, which is explained **here.** [519]
- Click **Spell Check** to check the spelling of the active document. Further details are available **here.** [607]
- Click **Properties** to open the **Properties** pane, which is explained **here.** [224]
- Click **Show Rulers** to view/hide the document rulers. Further details are available **here.** [525]

- Click **Show Grid** to insert a grid behind the active document. This feature is intended for use with the **Snapping Tool.** ⌐528⌐
- Click **Show Page Measurement Into** to determine whether or not the **Page Measurement Info** is displayed. (The **Page Measurement Info** is explained above at the **Document Options** entry above).
- Click **Find** to launch the find text function. This is explained **here.** ⌐217⌐
- Click **Document Properties** to launch the **Document Properties** dialog box, which is explained **here.** ⌐204⌐

6.3.1.11   Page Navigation Toolbar

Page Navigation Toolbar

The **Page Navigation Toolbar** is located at the bottom of the main window:
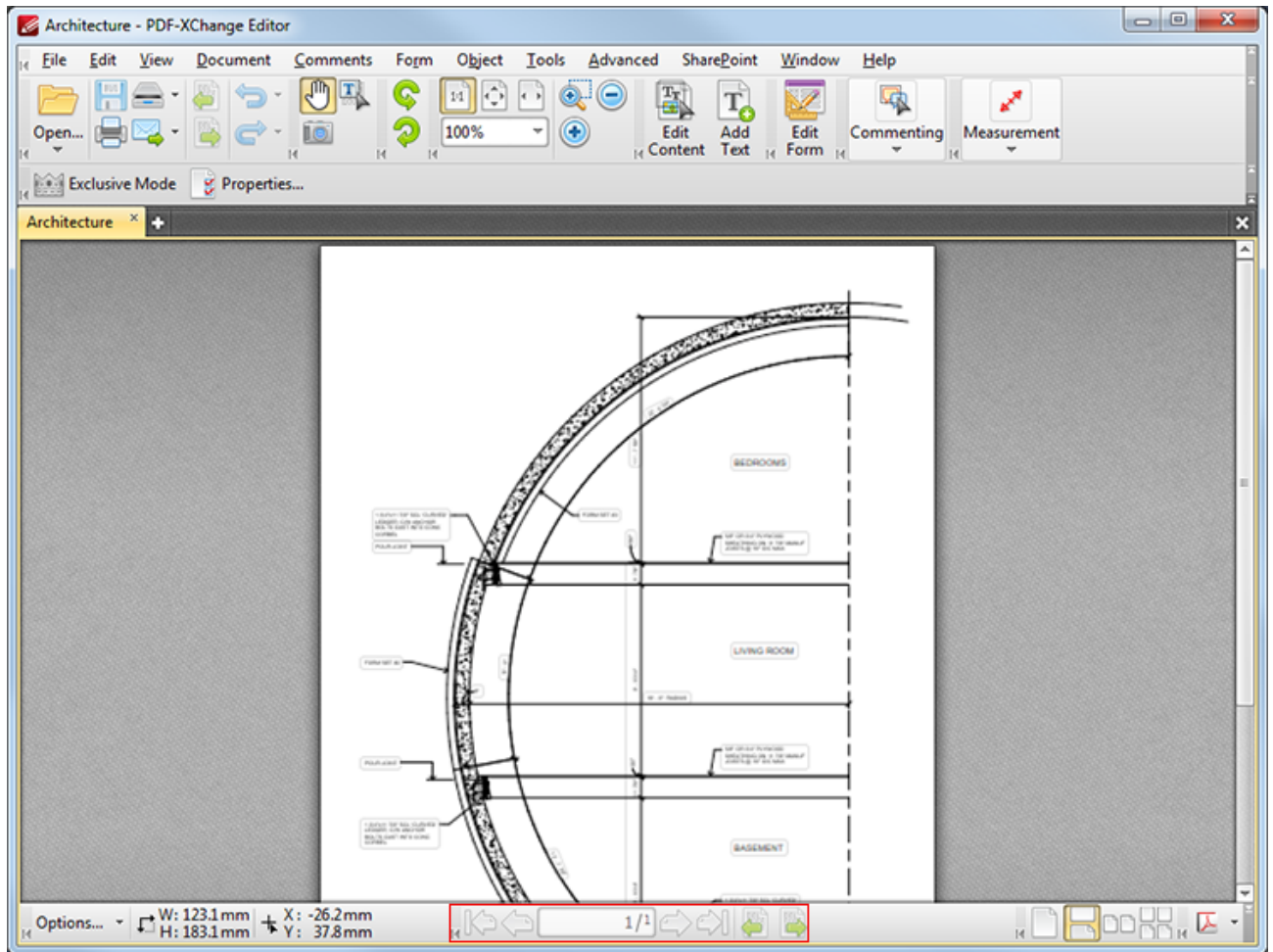
Figure 1. Page Navigation Toolbar

- Click the white 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 browse to it.

6.3.1.12 Page Layout Toolbar

Page Layout Toolbar

The **Page Layout Toolbar** is located on the lower right side of the main window:
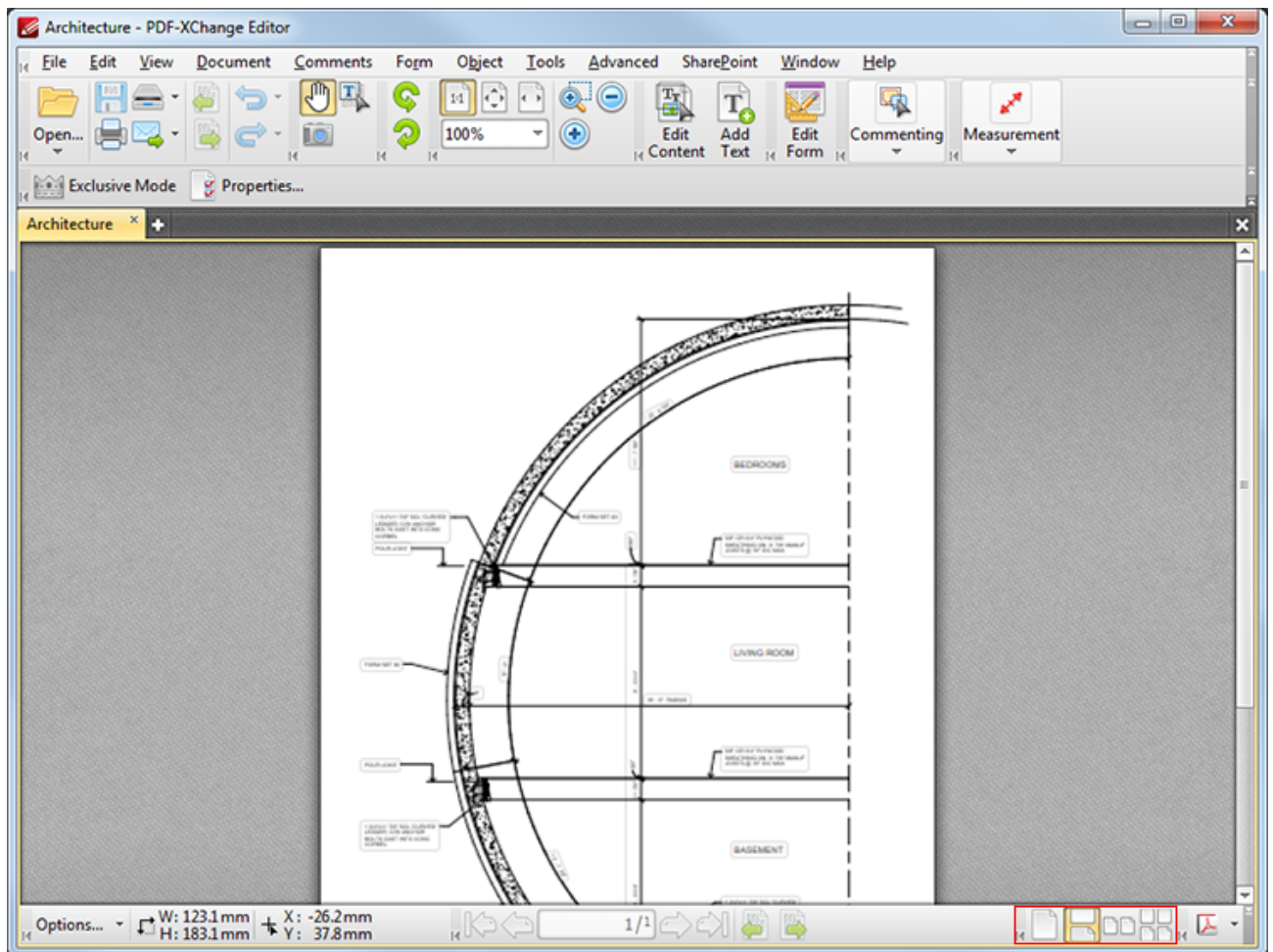
Figure 1. Page Layout Toolbar

- The Page Layout options determine how pages of active documents are displayed in the main window. The layouts correspond to those displayed in the icons of the toolbar:
  - **Single Page** means that documents will be displayed a single page at a time.

- **Continuous** means that consecutive pages of documents can be viewed simultaneously whilst scrolling.
- **Two Pages** means that documents will be displayed two pages at a time. Pages will be placed adjacently.
- **Two Pages Continuous** means that documents will be displayed two pages at a time and can be scrolled through in the standard manner.

Further options relating to the page display are available **here.** 234

6.3.1.13   Launch Application Toolbar

Launch Application Toolbar

The **Launch Application Toolbar** is located on the lower right corner of the main window:
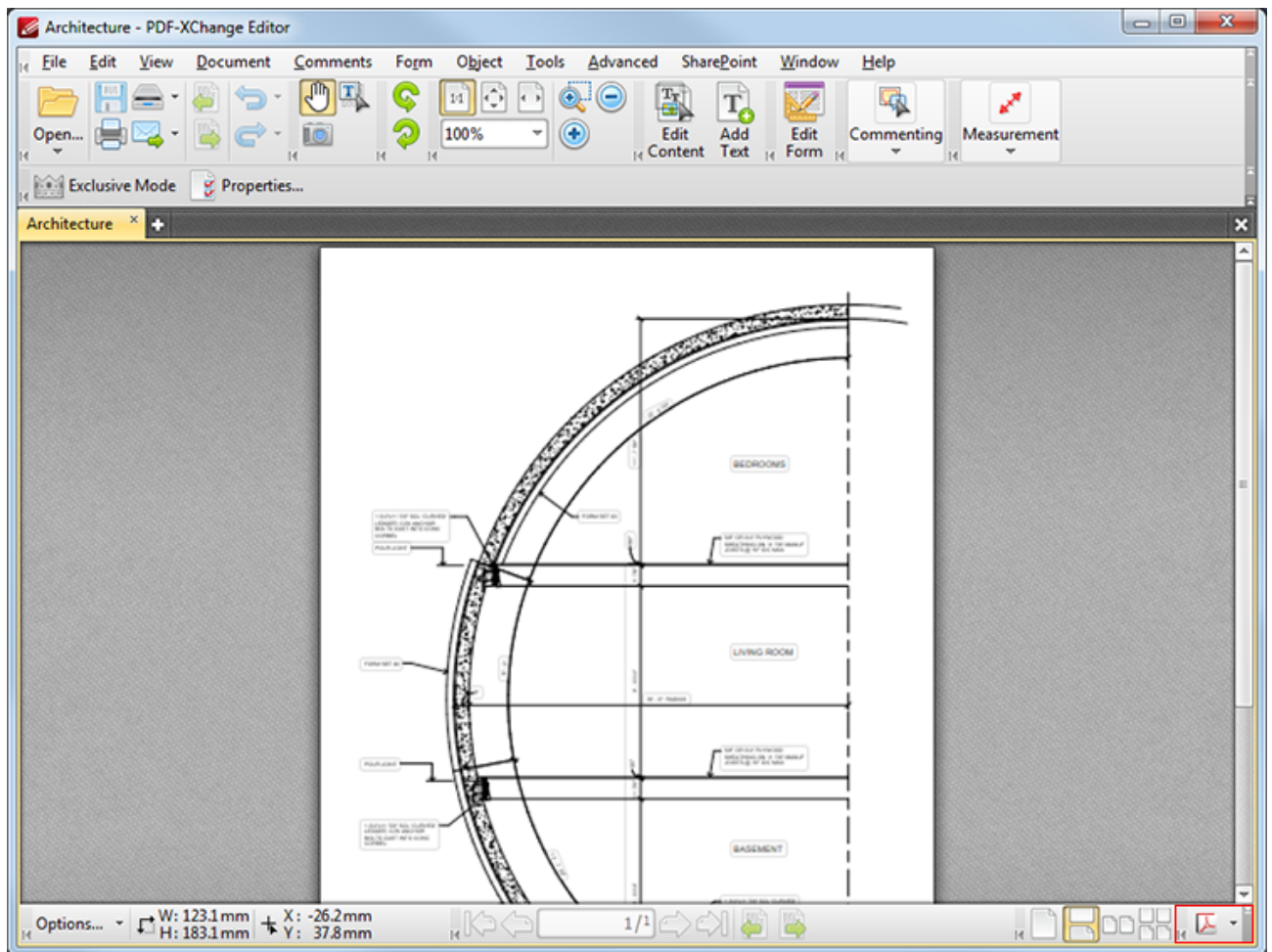
Figure 1. Launch Application Toolbar

This toolbar provides a convenient way to open active documents using third party applications. Instructions on how to add applications to this toolbar are available **here.** [289]

6.3.1.14 Properties Toolbar

Properties Toolbar

The **Properties Toolbar** is located in the upper section of the user interface:
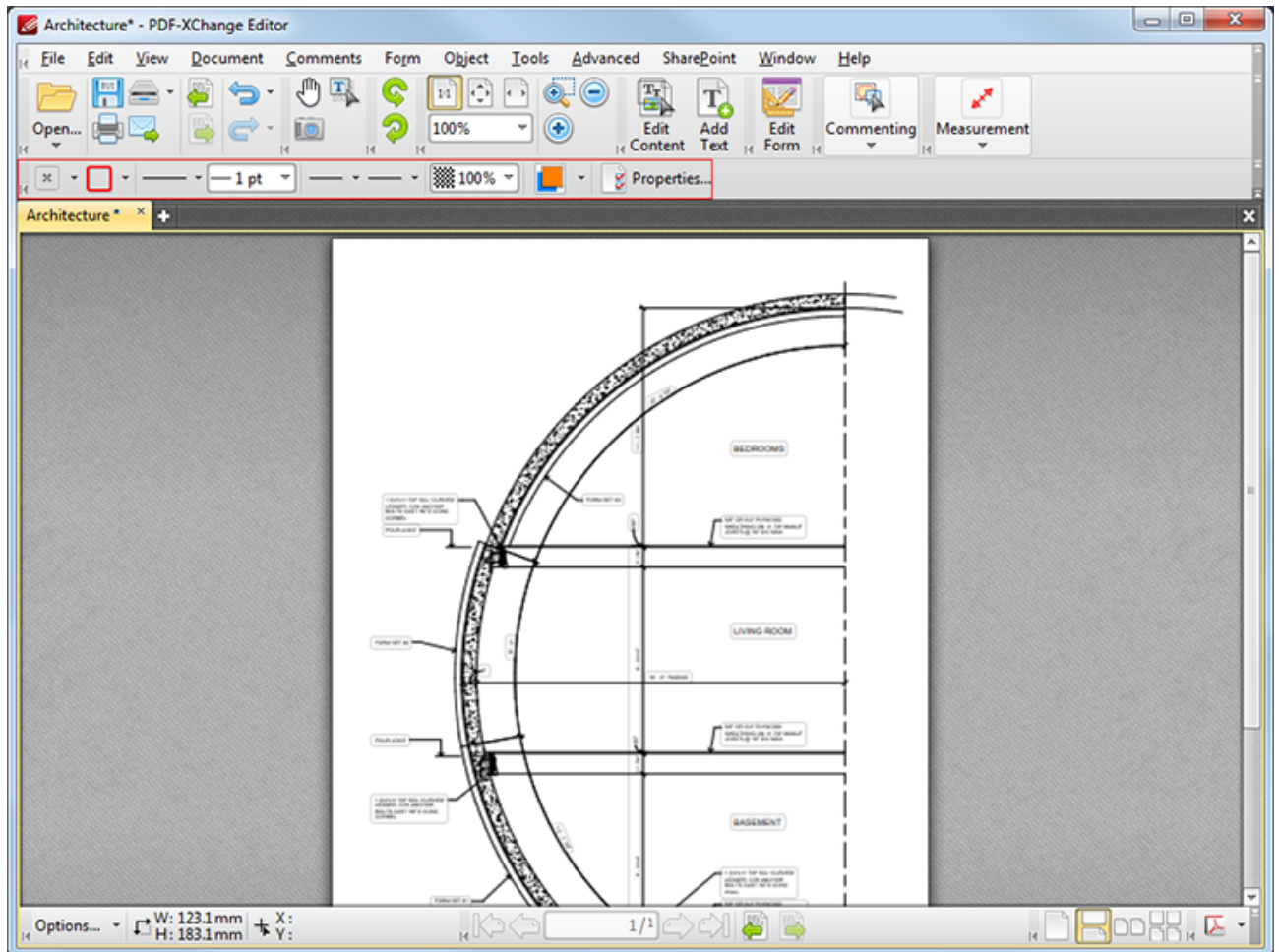
Figure 1. Properties Toolbar

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 for tools are detailed on the tool pages, which are available **here.** 632

- Multiple options are available in the **Properties Toolbar** when the **Edit Form** feature is enabled. See here 320 for further information.
- Text editing options are detailed in the **Properties Toolbar** when tools that feature text options are in use. See here 863 for further information.
- Press Ctrl+' to show/hide the **Properties Toolbar.**

6.3.1.15 Customize Toolbars

Customize Toolbars

Click **Customize Toolbars** to determine toolbar settings and create customized toolbars:
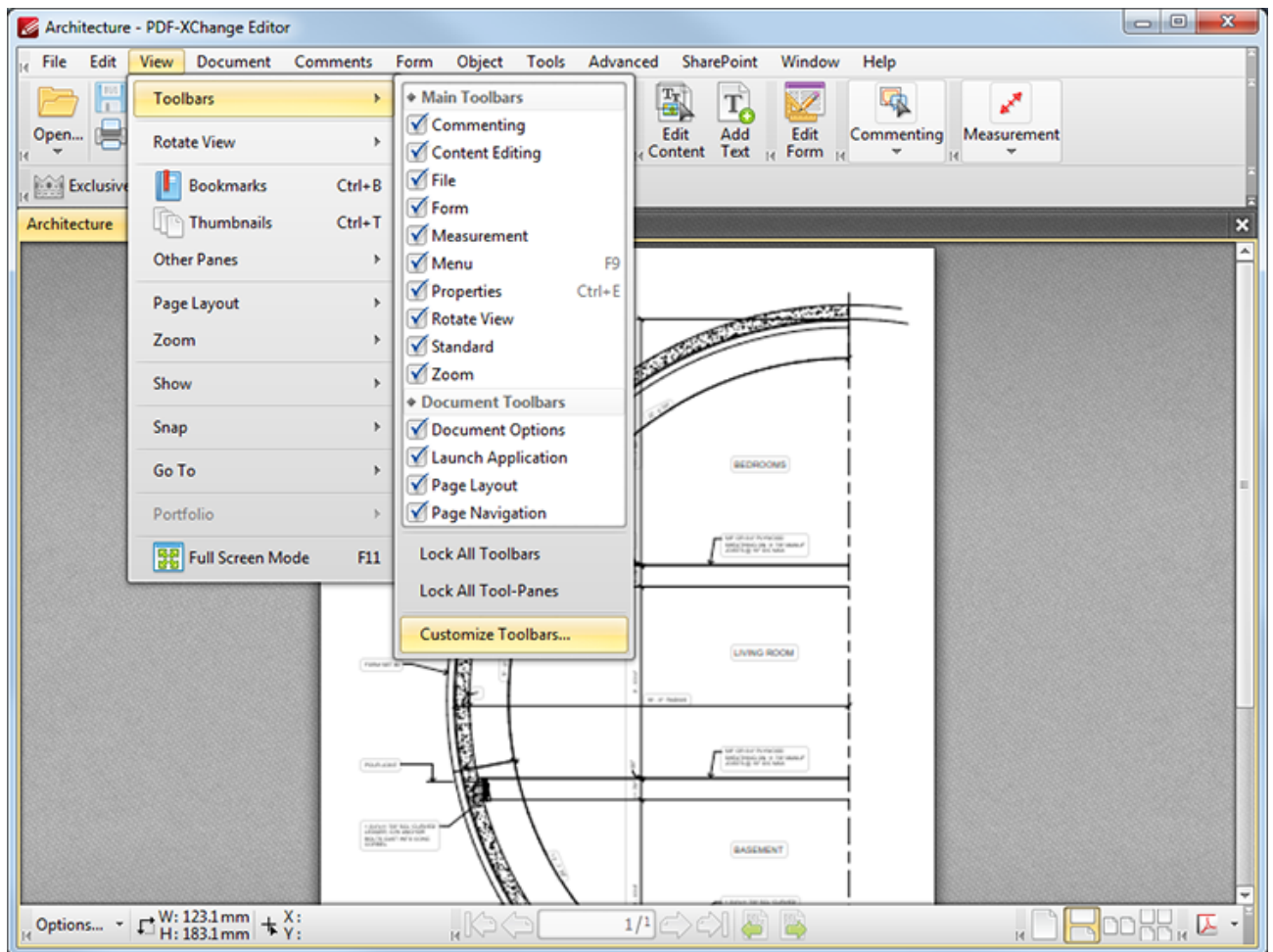
Figure 1. View Tab Submenu. Customize Toolbars

The following dialog box will open:
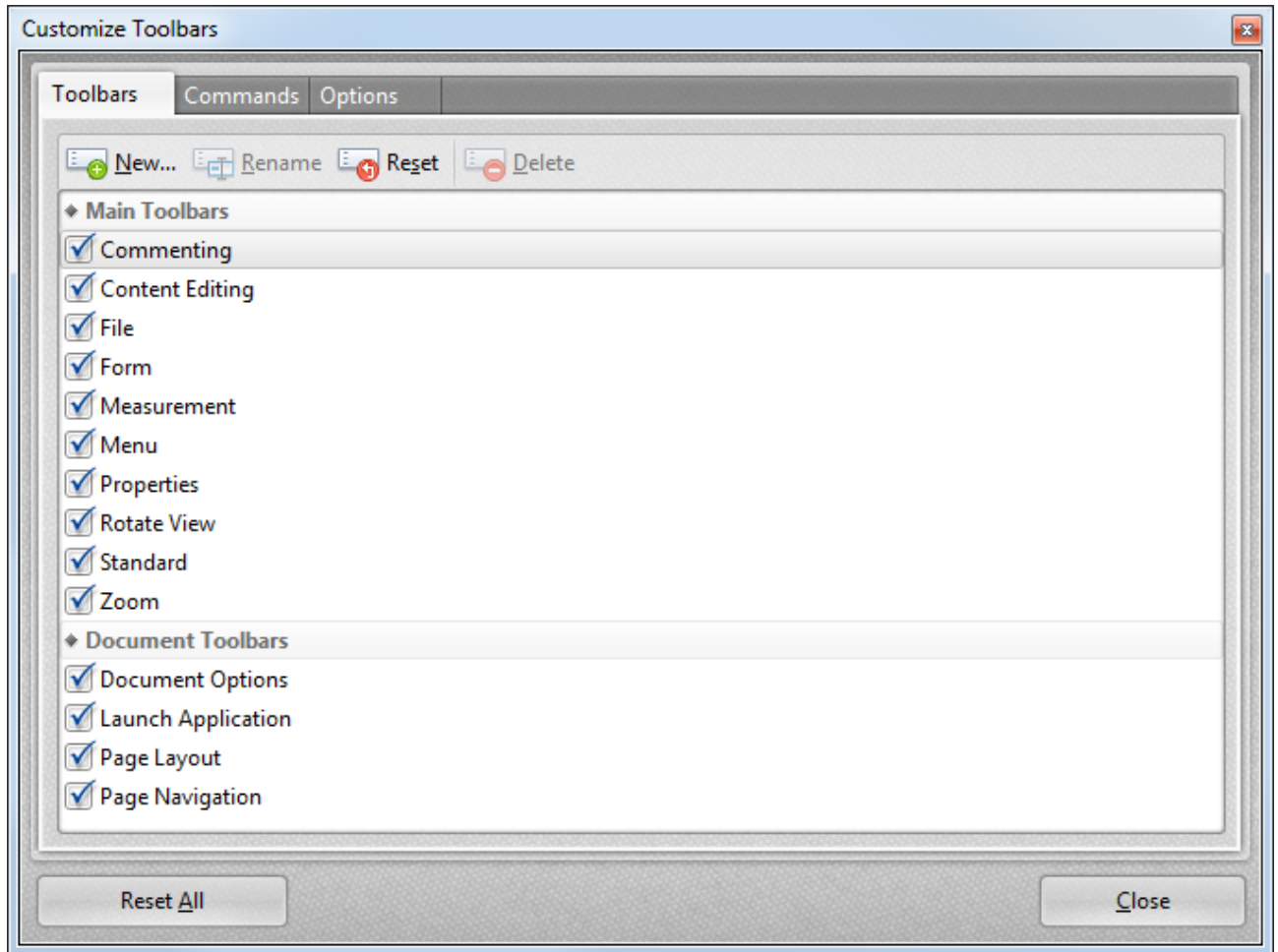
Figure 2. Customize Toolbars Dialog Box. Toolbars Tab Selected

All available toolbars are displayed in the **Toolbars** tab.

- 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,** 484 as detailed in *(figure 5)* below.
- Click **Rename** to rename custom toolbars.
- Click **Reset** to restore selected toolbars to default settings. Click **Reset All** to reset all modified toolbars.
- Clear the check boxes to disable the associated toolbars and remove them from the main window of the application.
- Click **Delete** to delete selected custom toolbars.

All available commands are displayed in the **Commands** tab:
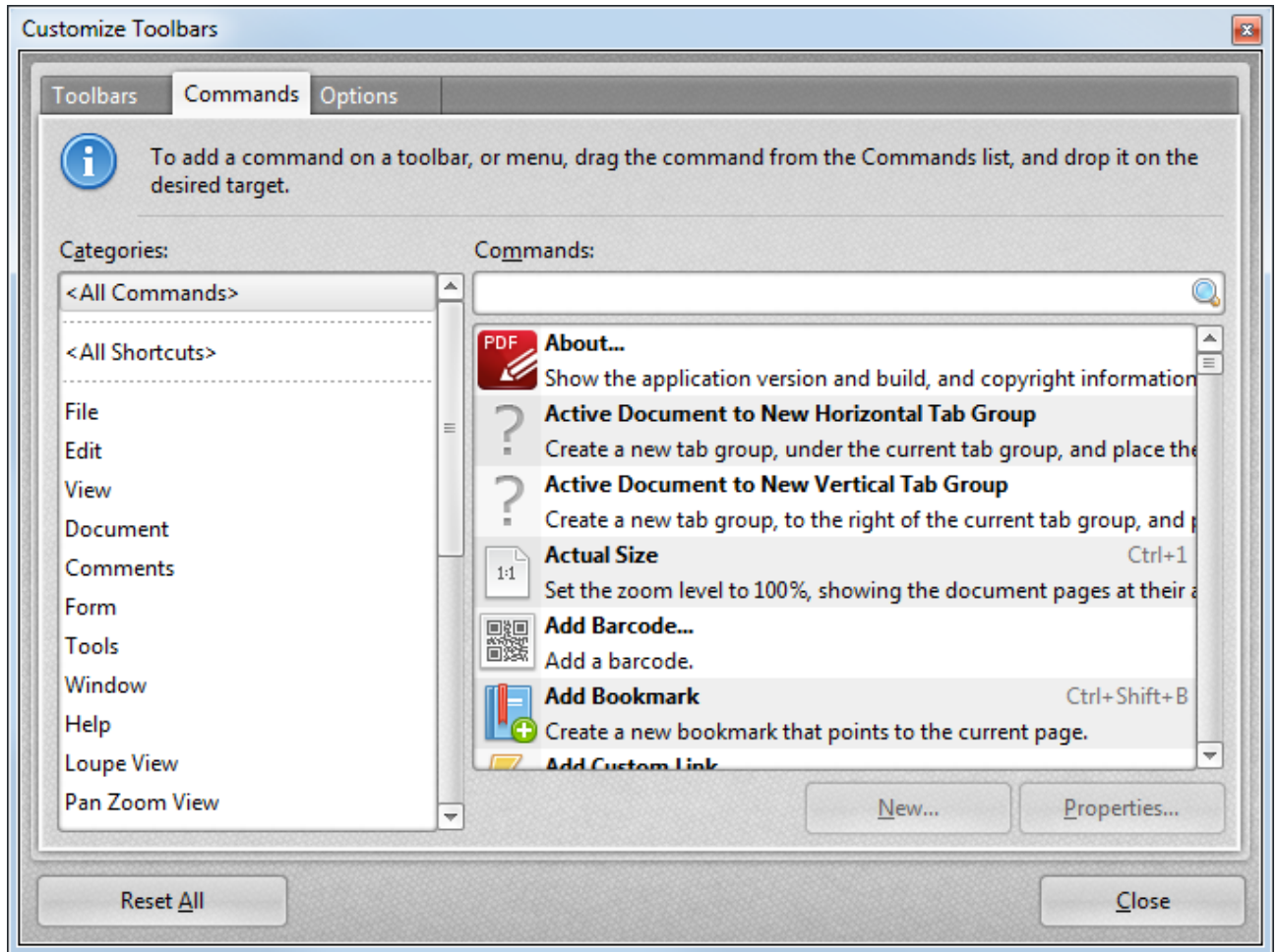
Figure 3. Customize Toolbars Dialog Box. Commands Tab Selected

- Use the **Categories** toolbar to determine the group of commands displayed in the viewing pane.
- Use the **Commands** text box to search for commands.
- Click and drag feature icons from other toolbars to add them to custom toolbars for convenient use.
- Alternatively, click and drag command icons to the desired toolbar in the main window. The associated icon will appear on the toolbar and can then be used as desired.
- Click **Properties** to view properties and further command settings, including the creation/editing of keyboard shortcuts.
- Please note that when **customized comment styles** [625] have been created and saved then they will be included in the **Custom Comment Styles** category. The processes outlined above can then be used to add customized comment styles to desired toolbars.

Click the **Options** tab for further options that relate to toolbars. The following options will be displayed and can be selected or cleared as desired:
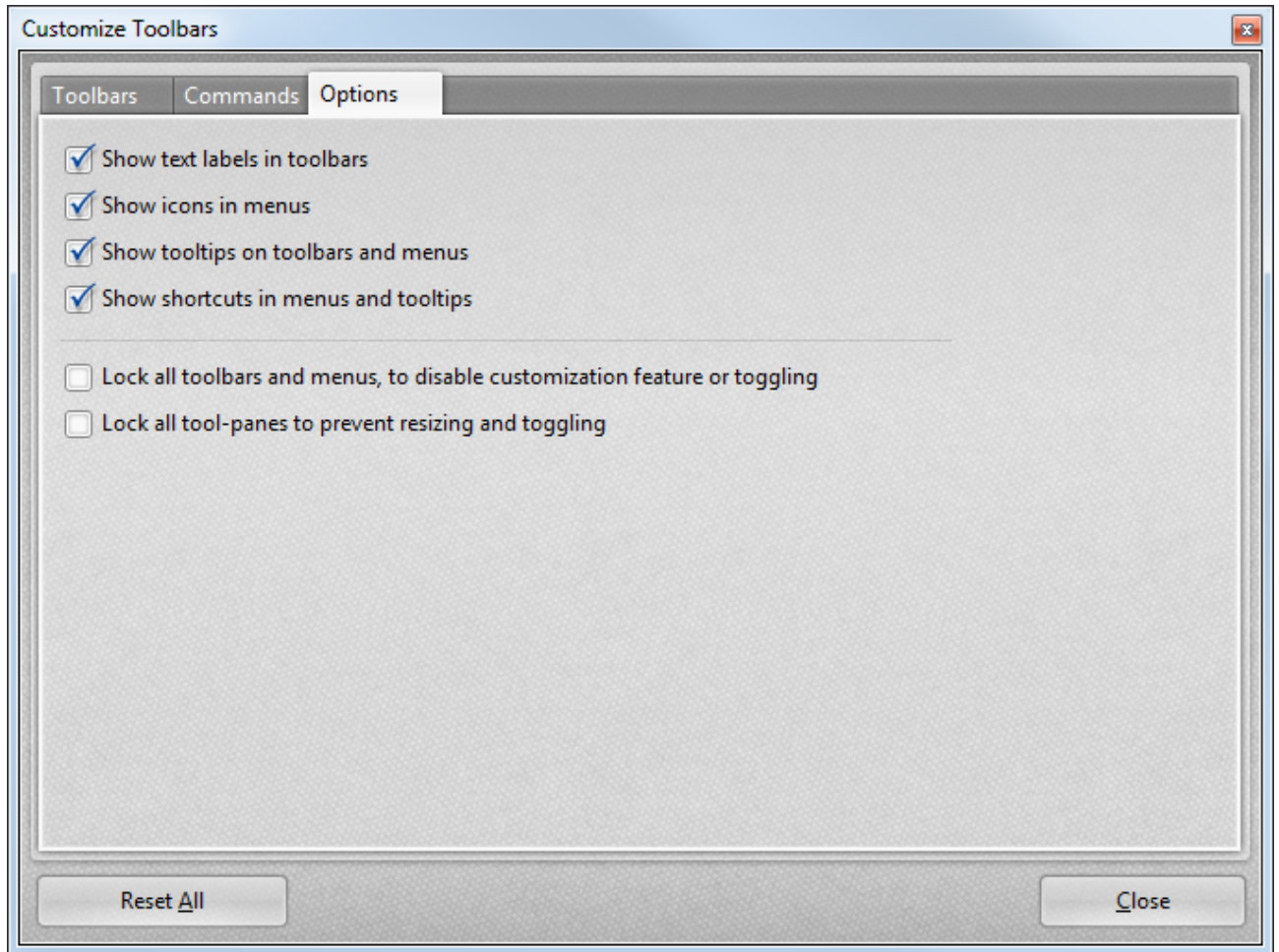
Figure 4. Customize Toolbar Options

When new toolbars are created they appear as below:
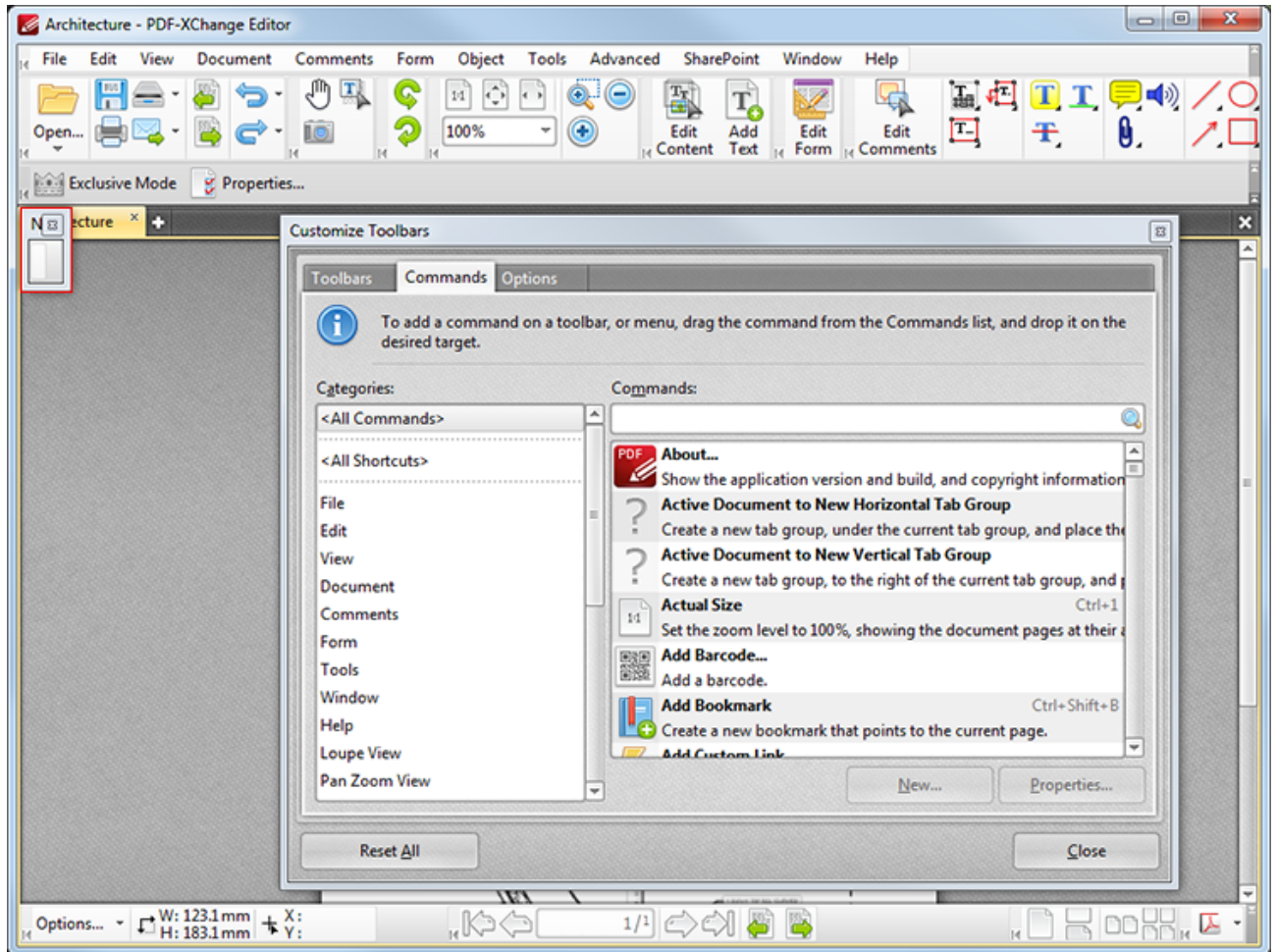
Figure 5. New Toolbar

Drag commands from the **Commands** submenu to add them to new/existing toolbars. A sample new toolbar is detailed below:
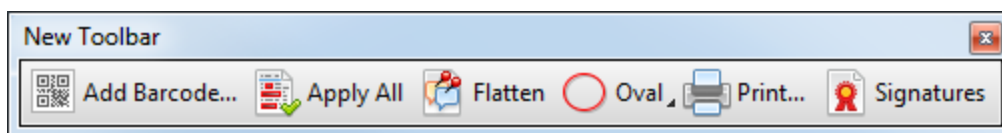
Figure 6. Sample Toolbar

This toolbar contains the following commands:

- **Add Barcode**
- **Apply All Redactions**
- **Flatten Comments**
- **Oval Tool**
- **Print**
- **Show/Hide the Signatures Pane**

Click to activate commands and, where applicable, right-click for additional options. Click and drag toolbars to change their location in the workspace. If toolbars are hovered over over specific areas in the workspace then the icon beneath the pointer will change. This indicates that the toolbar can be added to the interface, as detailed below:
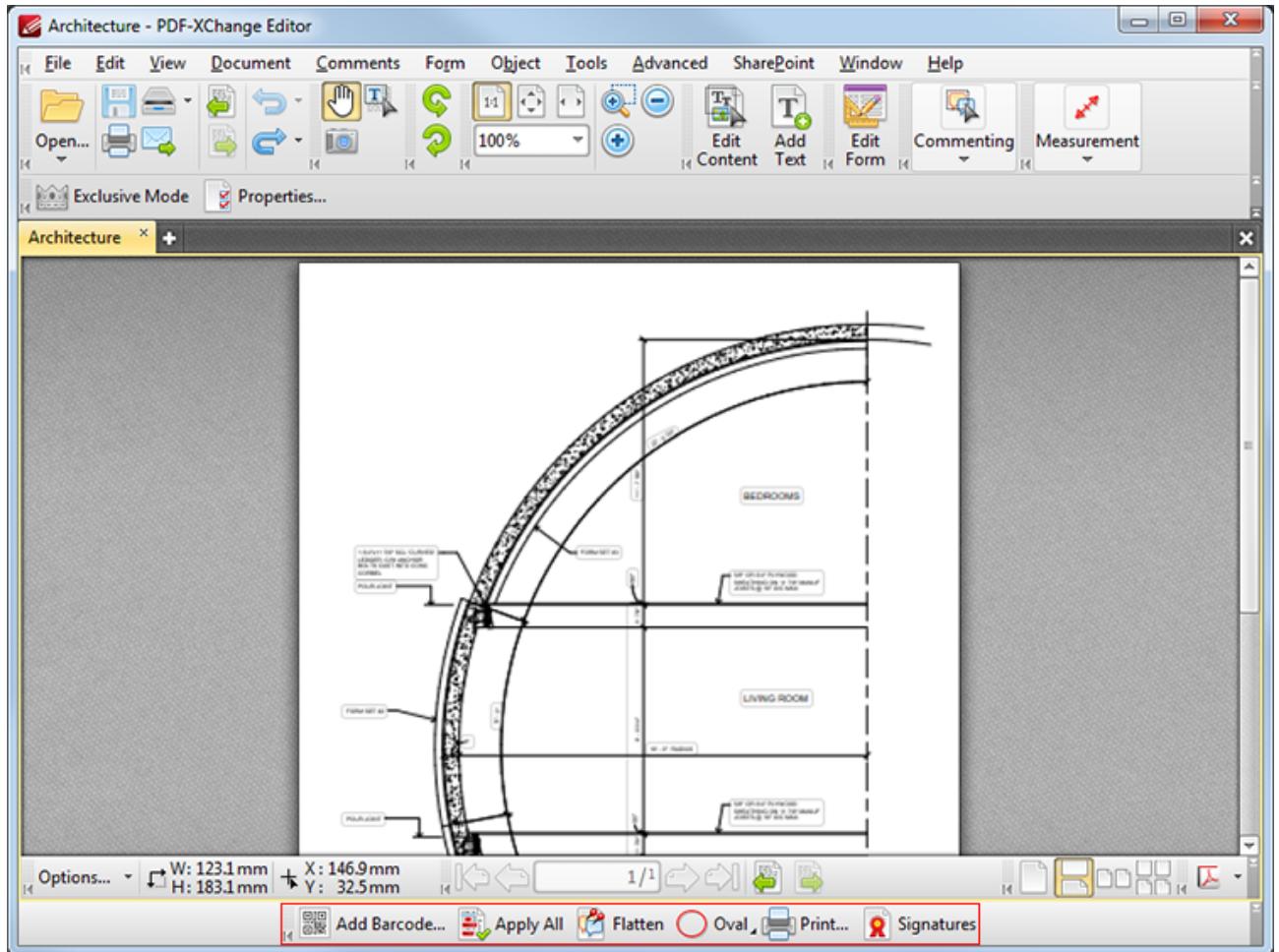
Figure 7. New Toolbar Added to Interface

6.3.2 **Rotate View**

Rotate View

Click **Rotate View** to rotate the current view:

Rotate Counterclockwise rotates the view counterclockwise. Pages will be rotated ninety degrees each time the icon is clicked.

Rotate Clockwise rotates the view clockwise. Pages will be rotated ninety degrees each time the icon is clicked.

6.3.3 **Bookmarks**

Bookmarks

Click **Bookmarks** (or press Ctrl+B) to view/hide the **Bookmarks** pane:
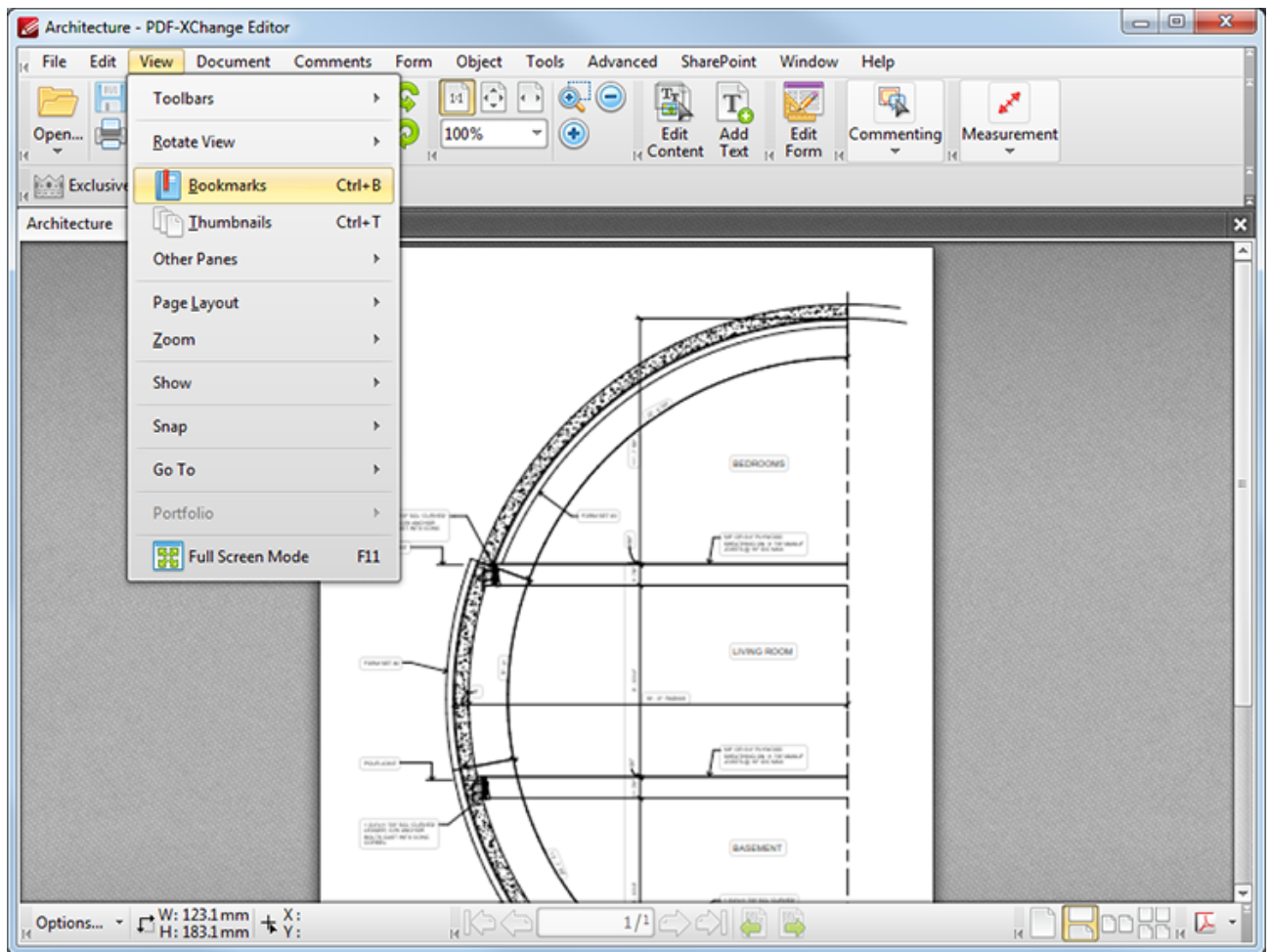
Figure 1. View Tab Submenu. Bookmarks

The **Bookmarks** pane appears as below:
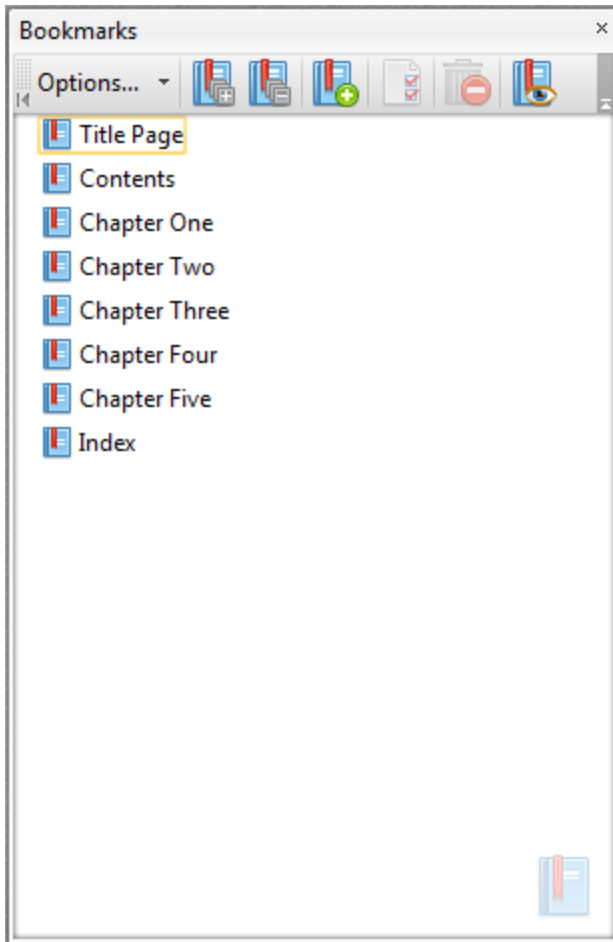
Figure 2. Bookmarks Pane

Bookmarks are used to designate specific places of importance within documents. All bookmarks contained within the active document are displayed in the **Bookmarks** pane. Click the toolbar icons to activate the following features:

Expand All Bookmarks to expand all bookmarks.

Collapse All Bookmarks to collapse all bookmarks.

New Bookmark to create a new bookmark. See **Keyboard Shortcuts** 814 for available keyboard shortcuts when creating new bookmarks.

Properties to view/edit the properties of the selected bookmark. The **Bookmark Properties** pane will launch. Click properties to edit them. See **here** 739 for an explanation of available actions that can be executed when bookmarks are selected.

Delete to delete the current selection.

Ensure Visibility of Corresponding Bookmark to expand parent bookmarks in a manner that ensures the visibility of corresponding bookmarks.

Click **Options,** or right-click bookmarks, to view bookmark commands. The following submenu will open:
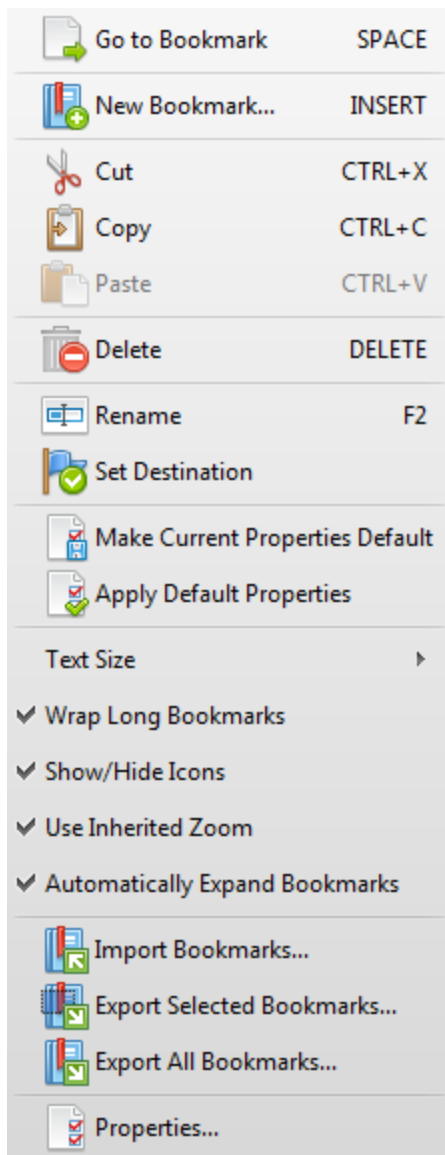
Figure 3. Bookmarks Options

- Click **Go To Bookmark** to move to the bookmark currently selected.
- Click **New Bookmark** to create a new bookmark.
- Click **Cut, Copy, Paste, Delete** and **Rename** to perform these actions on the selected bookmark.
- Click **Set Destination** to change the location of the selected bookmark to the point currently displayed within the active document.
- Click **Make Current Properties Default** to set the properties of the current bookmark as the default setting for subsequent bookmarks.

- Click **Apply Default Properties** to apply the default bookmark properties to the bookmark currently selected.
- Click **Text Size** to determine the font size of the bookmark titles within the **Bookmarks** pane.
- Click **Wrap Long Bookmarks** to fit bookmarks with long names to the dimensions of the **Bookmarks** pane.
- Click **Show/Hide Icons** as desired.
- Click **Use Inherited Zoom** to save the zoom level when bookmarks are created.
- Click **Automatically Expand Bookmarks** to view all child bookmarks with parent bookmarks.
- Click **Import Bookmarks** to import the bookmarks currently selected.
- Click **Export Selected Bookmarks** to export the bookmarks currently selected.
- Click **Export All Bookmarks** to export all bookmarks for subsequent use.
- Click **Properties** to view/edit the properties of selected bookmarks in the **Properties** pane. Use the **Actions** tab to add additional actions to be carried out when bookmarks are used, as detailed **here.** 739

Further bookmark options are available in the **Advanced** 757 tab. Additionally, the **Bookmarks Guide** 61 is a useful resource for bookmarks and bookmark operations.

6.3.4 **Thumbnails**

Thumbnails

Click **Thumbnails** to view/hide the **Thumbnails** pane:
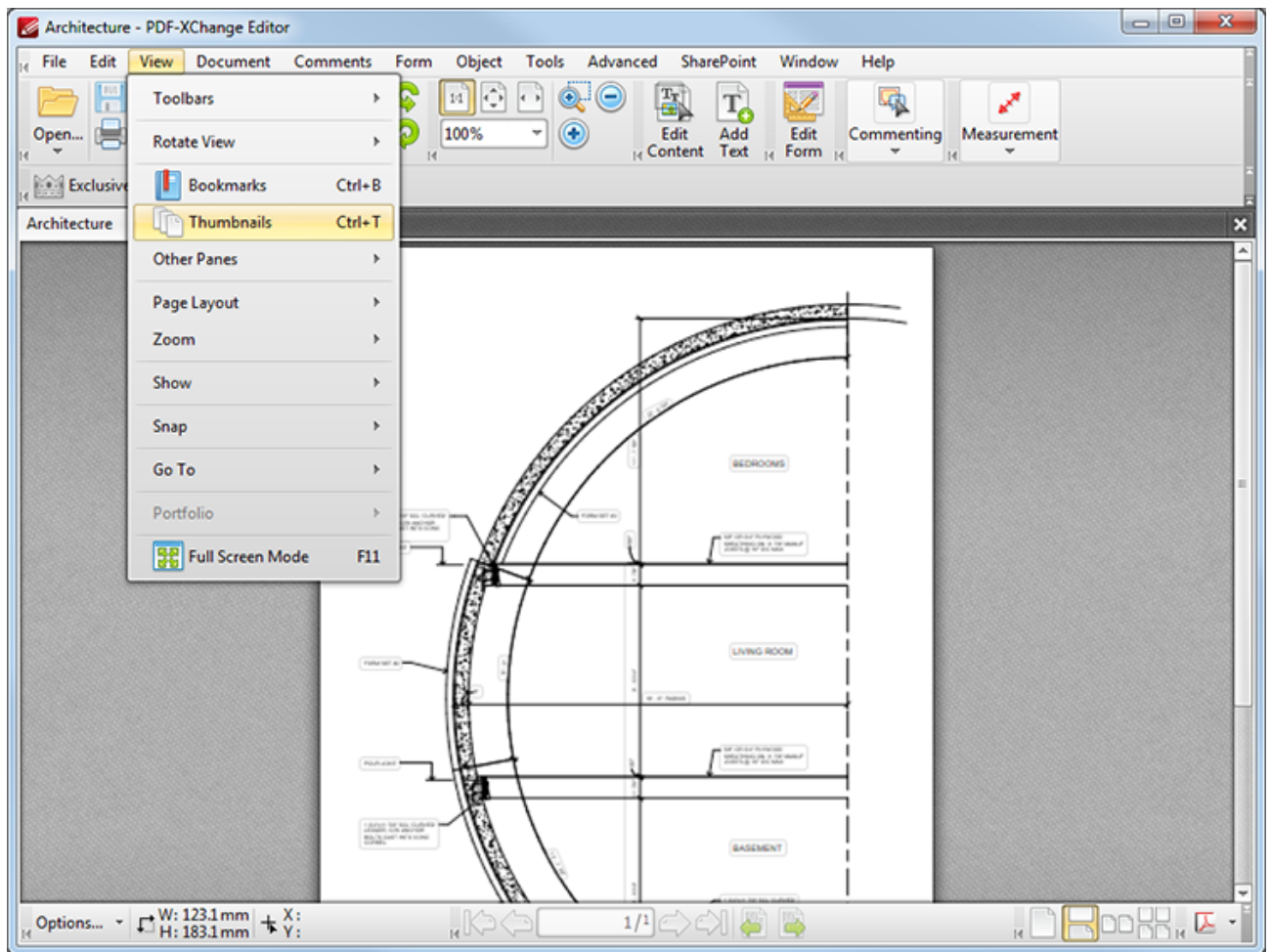
Figure 1. View Tab Submenu. Thumbnails

The **Thumbnails** pane appears as below:
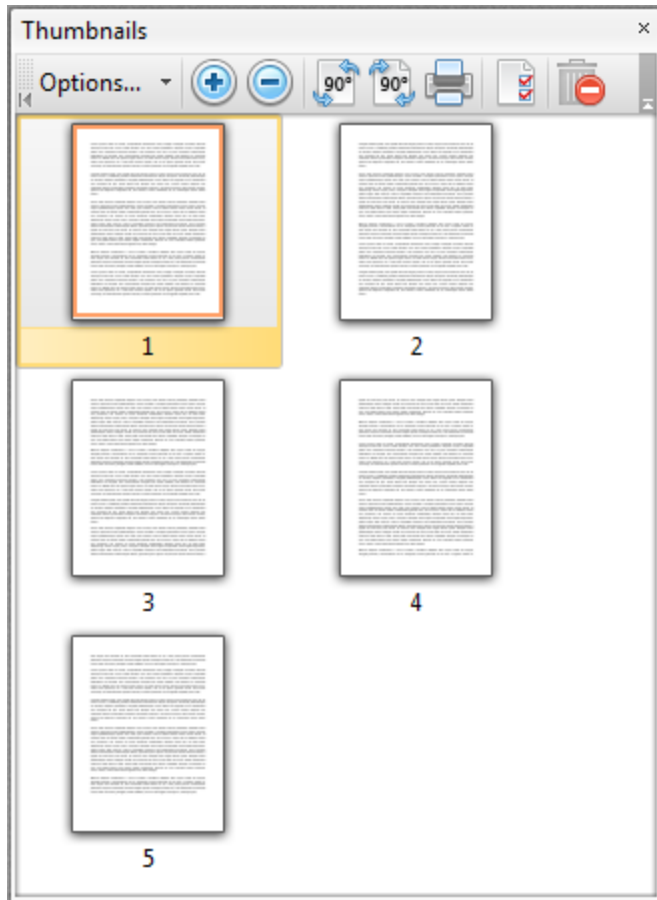
Figure 2. Thumbnails Pane

Thumbnails are a convenient method to view and manage document pages. A smaller representation of the pages of the active document are displayed in the **Thumbnails** pane.

- The orange box represents the current view.
- Click on specific locations within pages to move to those locations within the active document.
- Click and drag pages within the thumbnails pane to reorder them in the active document.
- Press and hold Ctrl to select multiple pages for group-editing.
- Thumbnails can also 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.
- Page thumbnails from other documents can be dragged into the thumbnails pane in order to add them to the active document. Alternatively, select and copy pages within one document and paste them into the thumbnails pane of another document in order to move pages between documents.

Click the icons to activate the following functions:

Zoom in Thumbnails to zoom in on the thumbnails pane.

Zoom Out Thumbnails to zoom out on the thumbnails pane.

Rotate Pages CCW 90° to rotate the page currently selected ninety degrees counterclockwise.

Rotate Pages CW 90° to rotate the page currently selected ninety degrees clockwise.

Print to print the current document/pages currently selected

Properies to view the properties of the page currently selected.

Delete to delete the page currently selected.

Click **Options,** or right-click thumbnails, to view thumbnail options:
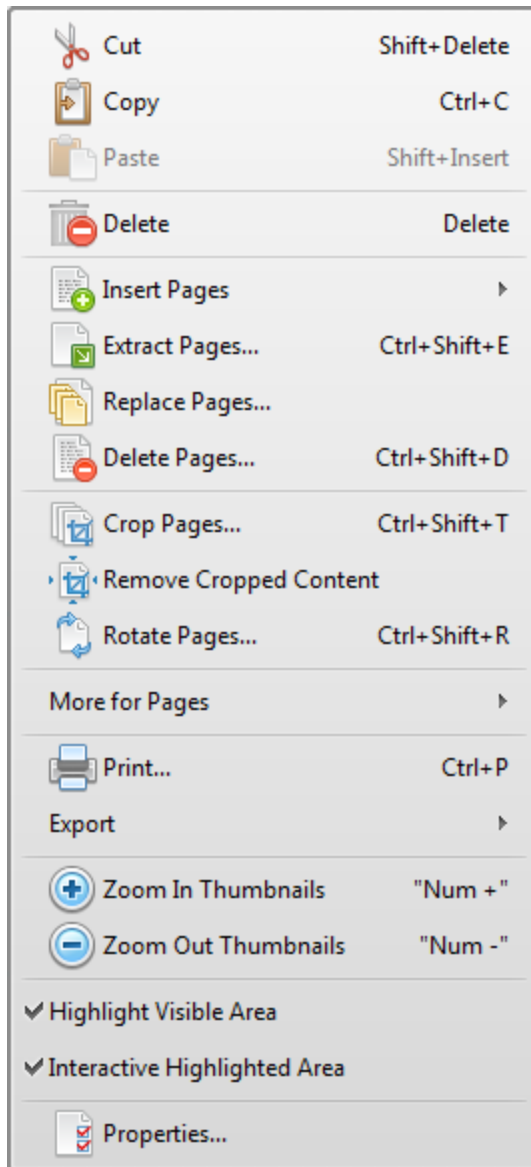
Figure 3. Thumbnails Options

- Click **Cut** to cut and add the current selection to the clipboard.

- Click **Copy** to copy and add the current selection to the clipboard.
- Click **Paste** to paste the contents of the clipboard into the thumbnails pane.
- Click **Delete** to delete the current selection.
- Click **Insert Pages** to view the **Insert Pages** options, which are explained **here.** 555
- Click **Extract Pages** to view the **Extract Pages** options, which are explained **here.** 563
- Click **Replace Pages** to view the **Replace Pages** options, which are explained **here.** 568
- Click **Delete Pages** to view the **Delete Pages** options, which are explained **here.** 571
- Click **Crop Pages** to view the **Crop Pages** options, which are explained **here.** 574
- Click **Remove Cropped Content** to remove cropped content from documents.
- Click **Rotate Pages** to view the **Rotate Pages** options, which are explained **here.** 578
- Click **More for Pages** to view the pages submenu, which is explained **here.** 580
- Click **Print** to open the **Print** dialog box, which is explained **here.** 198
- Click **Export** to view export options:
  - Click **Export to Image(s)** to convert selected pages into images. The **Export to Image(s)** dialog box will open. See **here** 195 for further information.
  - Click **Export selection to Microsoft Word Document** to convert and save selected pages in **(*.docx)** format.
  - Click **Export selection to Microsoft Excel** to convert and save selected pages in **(*.xlsx)** format.
  - Click **Export selection to Microsoft Powerpoint Presentation** to convert and save selected pages in **(*.pptx)** format.
- Click **Zoom In Thumbnails** to zoom in on the thumbnails pane.
- Click **Zoom Out Thumbnails** to zoom out on the thumbnails pane.
- **Highlight Visible Area** is selected by default. This means the area of the document currently visible in the main window is highlighted in the **Thumbnails** pane. Disable this option to remove the highlight box.
- **Interactive Highlighted Area** is selected by default. This means it is possible to 'grab' pages in the **Thumbnails** pane. Click and hold the ⊕ icon in the page currently selected to grab the page. The view in the main window will change according to how the icon is moved.
- Click **Properties** to launch the **Properties** pane for selected pages. The name and dimensions of pages is detailed in the pane. The following properties are adjustable:
  - **Rotation** determines the page rotation.
  - **Tab Order** determines the order in which objects, fields, comments and other annotations are scrolled through when using the **Tab** key.
  - **Actions** can be included to take place when thumbnails are used. See **here** 739 for further information.

6.3.5   Other Panes

Other Panes

Hover over **Other Panes** to view further **PDF-XChange Editor** editing panes:
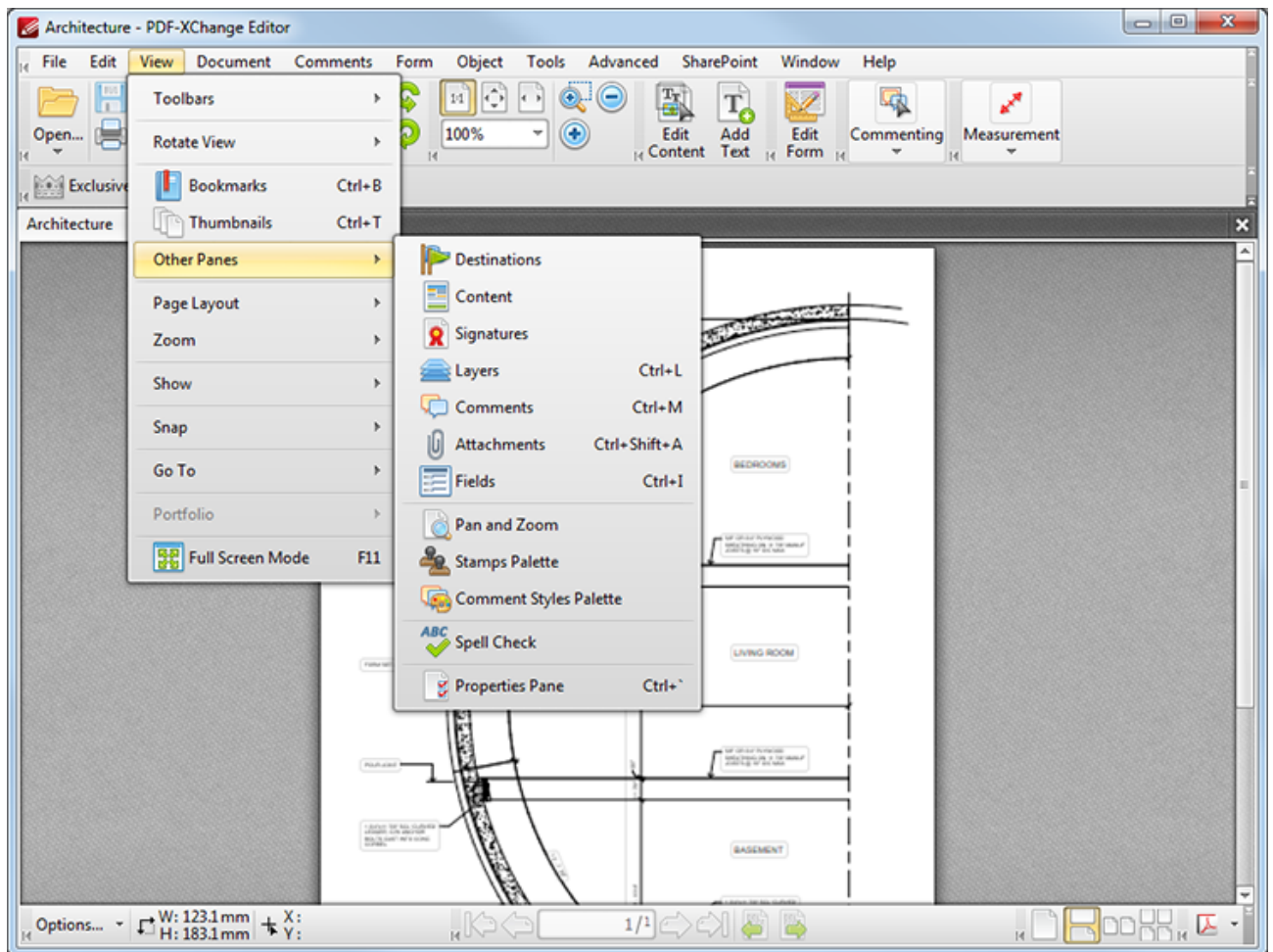
Figure 1. View Tab Submenu. Other Panes

- **Destinations** are specific locations within pages. Creating destinations makes it easier to navigate to important points within documents. See **here** 503 for further information.

- **Content** launches the **Content** dialog box, which displays a list of the pages within the active document and provides a page breakdown according to base content. See **here** 505 for further information.
- **Articles** is not yet available but it will be included in later builds of **PDF-XChange Editor.**
- **Signatures** launches the **Signatures** pane, which provides information relating to signatures within documents. See **here** 508 for further information on the **Signatures** pane. See **here** 597 for further information on digital signatures.
- **Layers** displays information about document layers. See **here** 511 for further information.
- **Comments** launches the **Comments** pane, which displays a list of comments, annotations and markups in the active document. See **here** 514 for further information.
- **Attachments** launches the **Attachments** pane, which details current attachments and facilitates the creation/removal of attachments. See **here** 517 for further information.
- **Fields** launches the **Fields** pane, which details existing fields and facilitates their editing. See **here** 519 for further information.
- **Pan and Zoom** launches the **Pan and Zoom** pane. See **here** 650 for further information.
- **Stamps Palette** launches the **Stamps Palette** pane, which details available stamps and facilitates the creation of new stamps. See **here** 704 for further information.
- **Comment Styles Palette** launches the **Comment Styles Palette**, which displays the commenting tools and facilitates further associated features. See **here** 625 for further information.
- **Spell Check** launches the **Spell Check** pane, which determines the settings when the **Spell Check** feature is used. See **here** 607 for further information.
- **Properties** launches the for the object/tool currently selected. See **here** 224 for further information.

6.3.5.1   Destinations Pane

Named Destinations Pane

Click **Destinations** to open the **Named Destinations** pane:
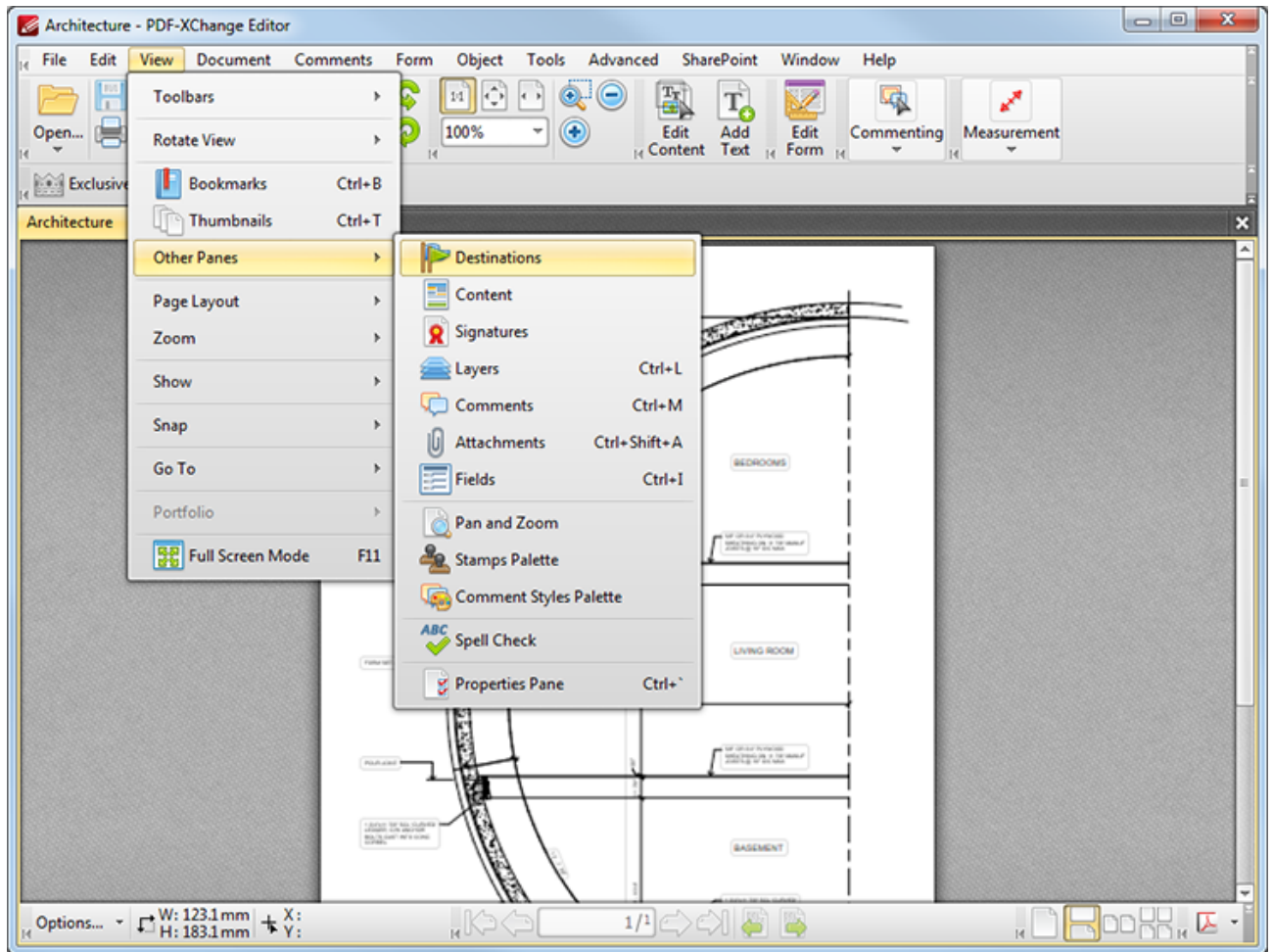
Figure 1. View Tab Submenu. Destinations

The **Destinations** pane appears as below:
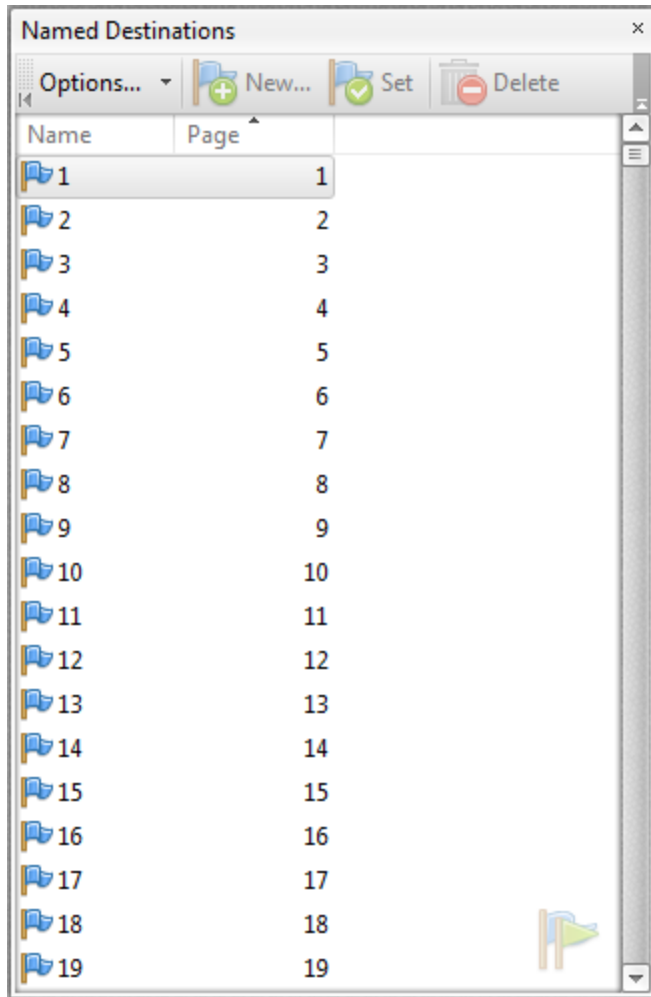
Figure 2. Named Destinations Pane

Named destinations are specific, user-defined locations within documents. Creating named destinations makes it easier to navigate to important points. **PDF-XChange Editor** uses the current view to create named destinations. Please note:

- Existing named destinations are detailed in the pane.
- Click **New** (or press Insert) to create a new named destination from the current view. Enter a name for the destination in the text box as desired.
- Click **Set** to assign the current view as the target for an existing named destination.
- Click **Delete** to delete the named destination currently selected.
- Click the **Options** menu for further options:
  - Click **Go To Destination** to go to the destination currently selected. Alternatively, double-click destinations to move to them.
  - Click **Rename** to rename the named destination currently selected.

6.3.5.2 Content Pane

 Content Pane

Click **Content** to open the **Content** pane:
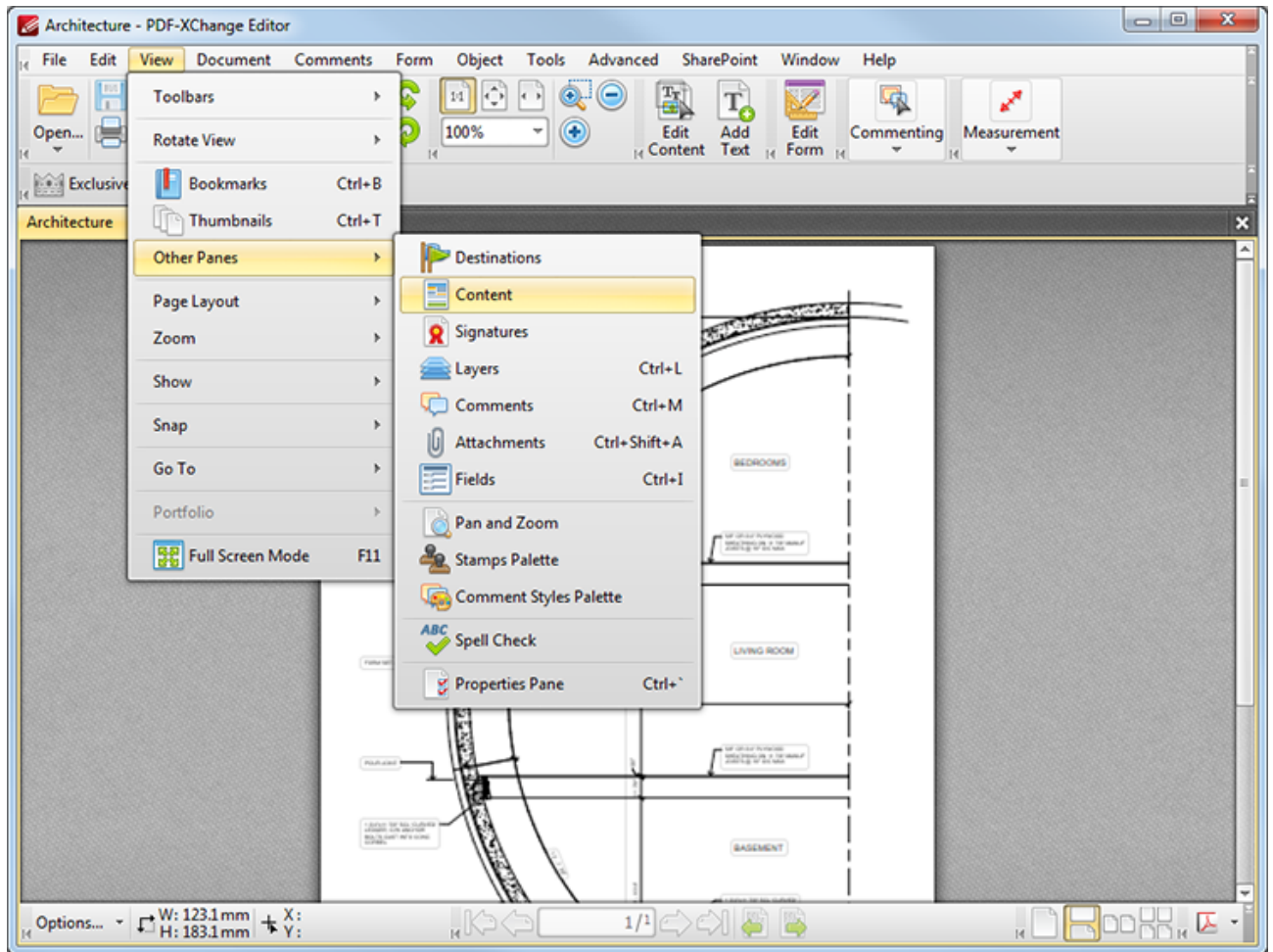
Figure 1. View Tab Submenu. Content

The **Content** pane displays a list of the pages within the active document and base content that pages contain. It appears as below:
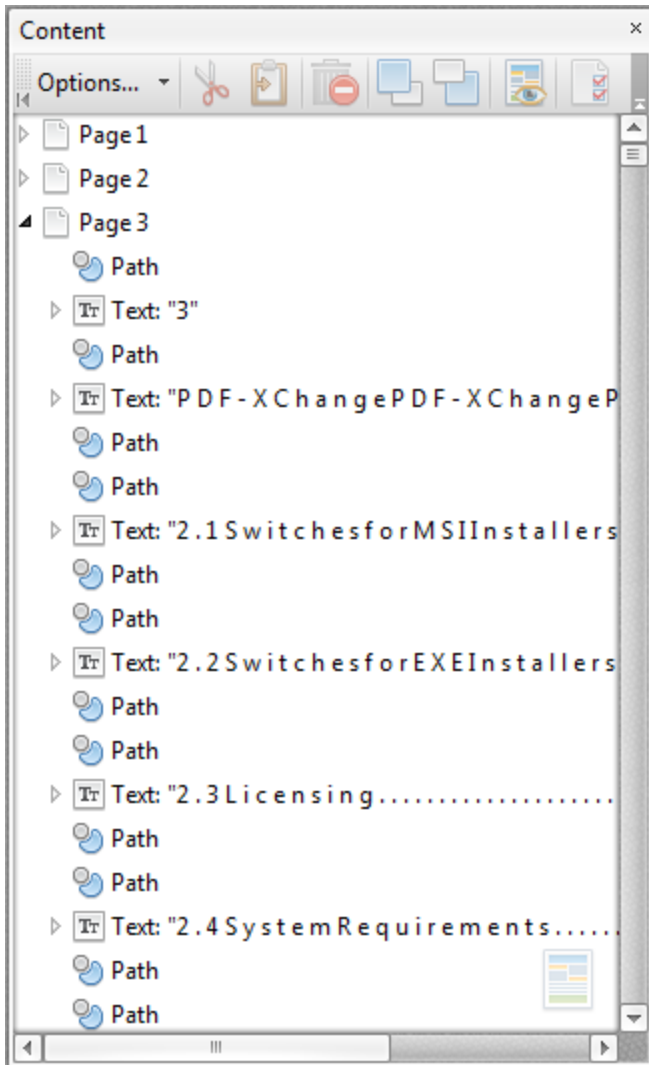
Figure 2. Content Pane

- All content items of pages are detailed when the associated entries are expanded. Please note that "Path" refers to vector images.
- Click entries to select them in the active document. They can then be edited as detailed **here.** 807
- Use the **Options** menu or the **Content** pane toolbar for further options:
  - Click **Cut, Copy, Paste** or **Delete** to perform these standard operations on selected content.
  - Click **Order** to reorder content:
    - Select **Bring to Front** to bring content to the front in cases of multiple objects overlapping.
    - Select **Send to Back** to send content to the back in cases of multiple objects overlapping.
    - Select **Bring Forward** to bring content to the front in cases of two objects overlapping.

- Select **Send Backward** to send content to the back in cases of two objects overlapping.
- Click **Select** to **Select All** content within the active document. Then select either **Text, Images** or **Shapes** as desired. When editing commands are selected subsequently they will relate to all selected content.
- Click **Deselect** to deselect content currently selected.
- Click **Expand All Descendants** to expand all child entries of the selected content item.
- Click **Collapse All** to collapse all items in the content items tree.
- Click **Display selected item** to display selected document items in the content pane.
- Click **Properties** to view/edit the properties of content currently selected. The **Properties pane** 224 will open. Alternatively, the **Properties Toolbar** 484 can be used to edit the main properties of selected content. The following options are available for content items:
  - **Fill Color** determines the fill color.
  - **Opacity** determines the level of transparency.
  - **Stroke Color** determines the border color.
  - **Stroke Opacity** determines the level of transparency in the border.
  - **Border Width** determines the border width.
  - **Blend Mode** determines the blending options when items overlap. See **here** 794 for further information.
  - **Width** displays the width of images. Please note that it is not possible to edit this value.
  - **Height** displays the height of images. Please note that it is not possible to edit this value.
  - **Type** displays the format of images. Please note that it is not possible to edit this value.
  - **BPC** displays the level of color depth.
  - **Color Space** displays the active color model
  - **Mask Type** displays the active mask type of selected content items.
  - **Object Number** displays the object number of selected content items.
  - **Font** determines the font used in text-based items. Click the current font in the Properties pane to select a different one.
  - **Font Size** determines the size of the font used in text-based items.
  - **Bold** enables/disables bold for selected text.
  - **Italic** enables/disables italics for selected text.
  - The **Font Details** section displays further information about fonts.

6.3.5.3 Signatures Pane

Signatures Pane

Click **Signatures** to open the **Signatures** pane:
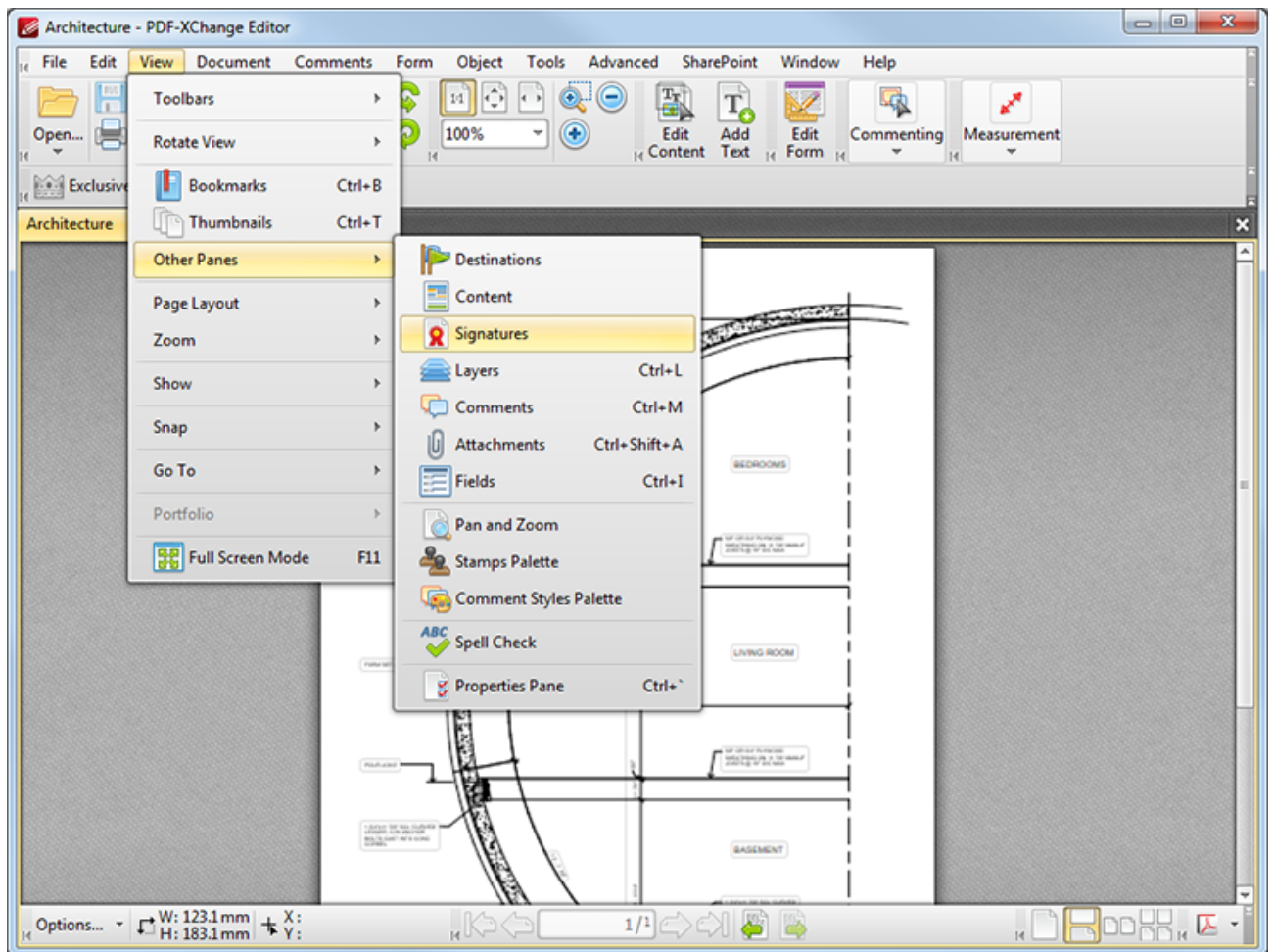
Figure 1. View Tab Submenu. Signatures

The **Signatures** pane provides information relating to existing document signatures. It appears as below:

Figure 2. Signatures Pane

- Click underlined entries to view further details/move to the signature location.
- Click **Validate All** to validate all document signatures.
- Click **Clear All** to remove all document signatures.
- Click **Options** to view the signatures options menu:
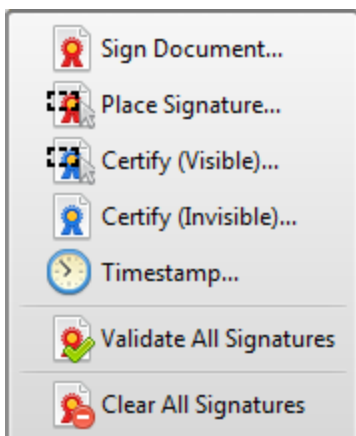
Figure 3. Signatures Options Menu

See **here** 597 for an explanation of these options.

6.3.5.4 Layers Pane

Layers Pane

Click **Layers** to open the **Layers** pane:
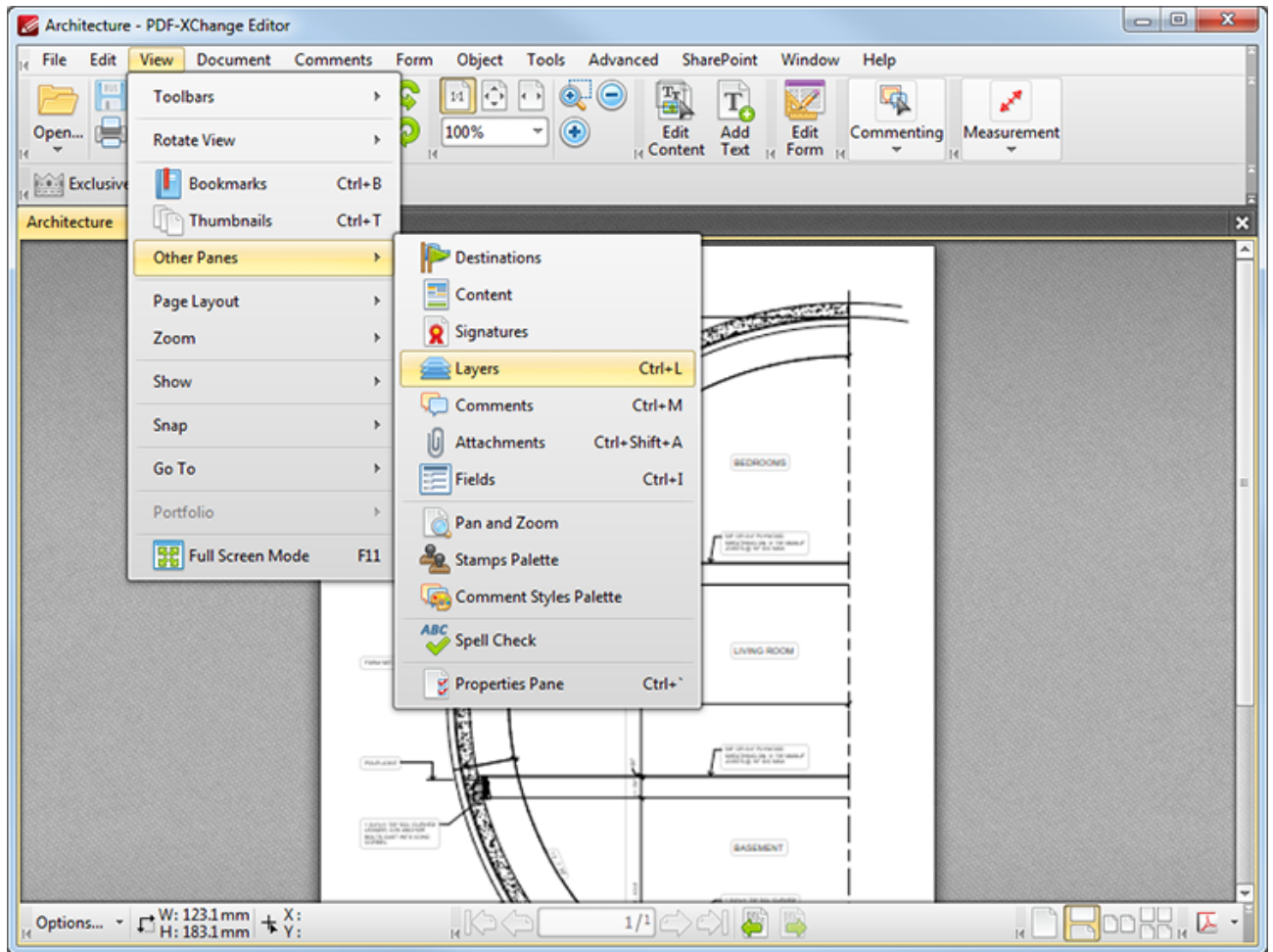
Figure 1. View Tab Submenu. Layers

The **Layers** pane displays information about optional document layers that can be created using applications such as **InDesign, AutoCAD** and **Visio.** It appears as below:
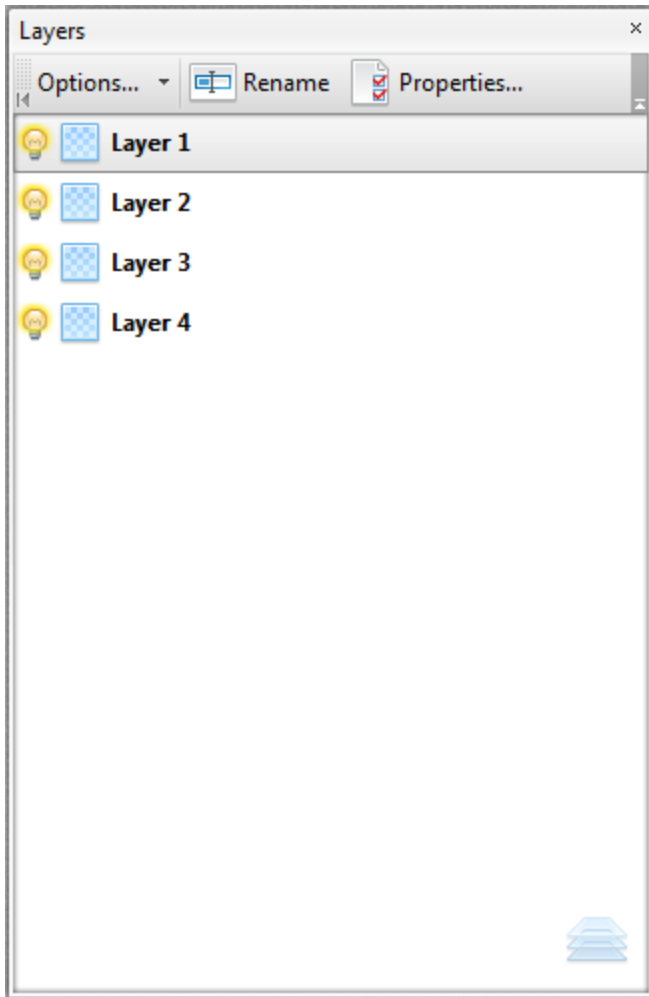
Figure 2. Layers Pane

Layers are displayed/hidden as required - for example when documents are available in multiple languages then the language associated with the layer selected will be displayed. Please note that it is not possible to create layers using **PDF-XChange Editor.** A lit lightbulb means the associated layer is displayed. The layers toolbar can be used to access the following options:

- Click **Options** to view the options for layers:
  - Click **List Layers for All Pages** to view a list of all layers within the active document.
  - Click **List Layers for Visible Pages** to view a list of all layers within pages currently visible.
  - Click **Reset to Initial Visibility** to revert the document to its initial visibility settings.
  - Click **Apply Layers Overrides** to display all layers, including those not listed in the layers pane.
  - Click **Expand All** to expand all expandable elements of the layer's tree.
  - Click **Collapse All** to collapse all collapsible elements of the layer's tree.
  - Click **Rename** to rename the layer currently selected.
  - Click **Properties** to view/edit the properties of the layer currently selected.

- Click **Rename** to rename the layer currently selected.
- Click **Properties** to view/edit the properties of the layer currently selected.

6.3.5.5   Comments Pane

Comments Pane

Click **Comments** to open the **Comments** pane:
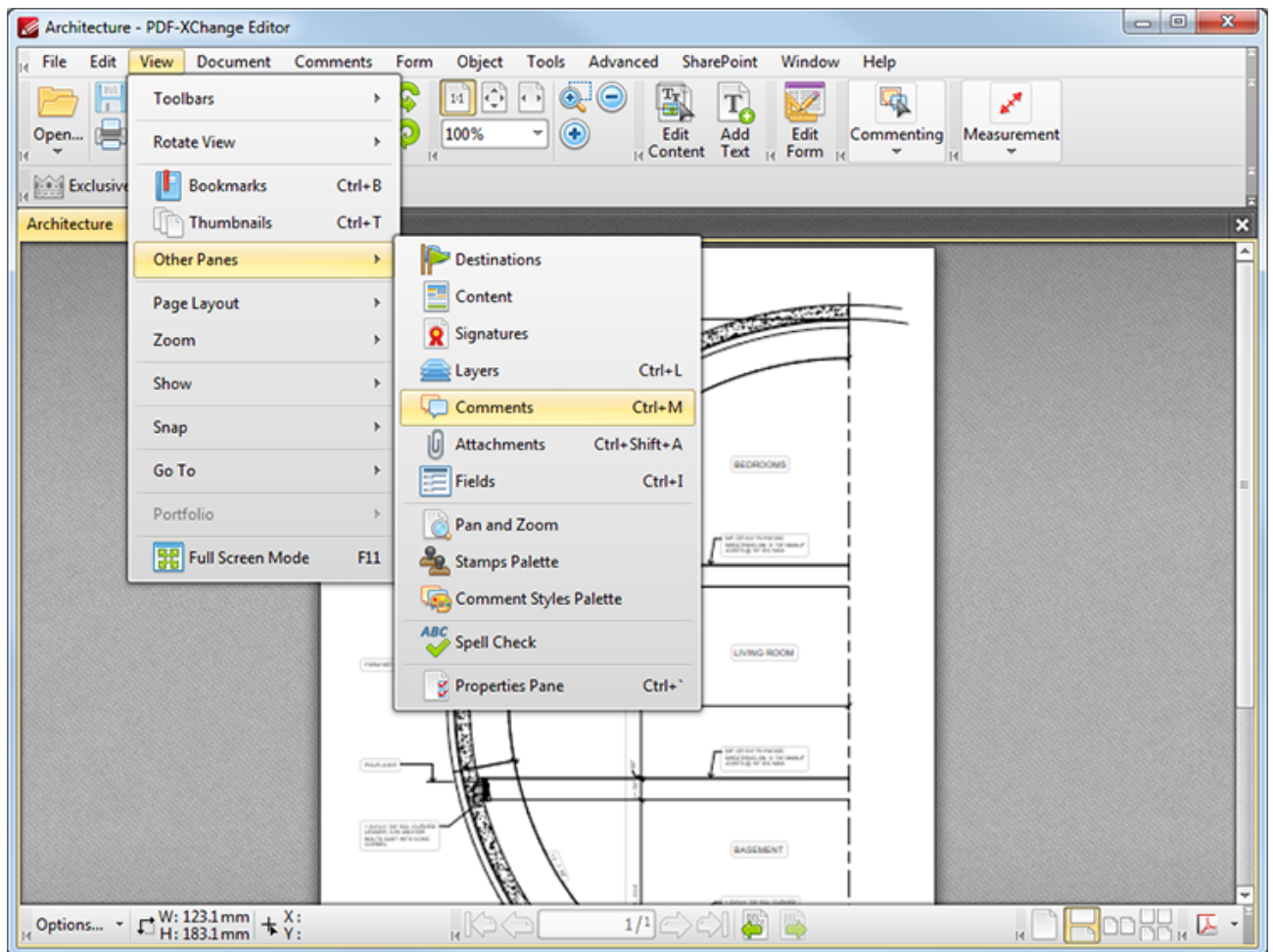
Figure 1. View Tab Submenu. Comments

The **Comments** pane displays a list of comments, annotations and markups in the active document:
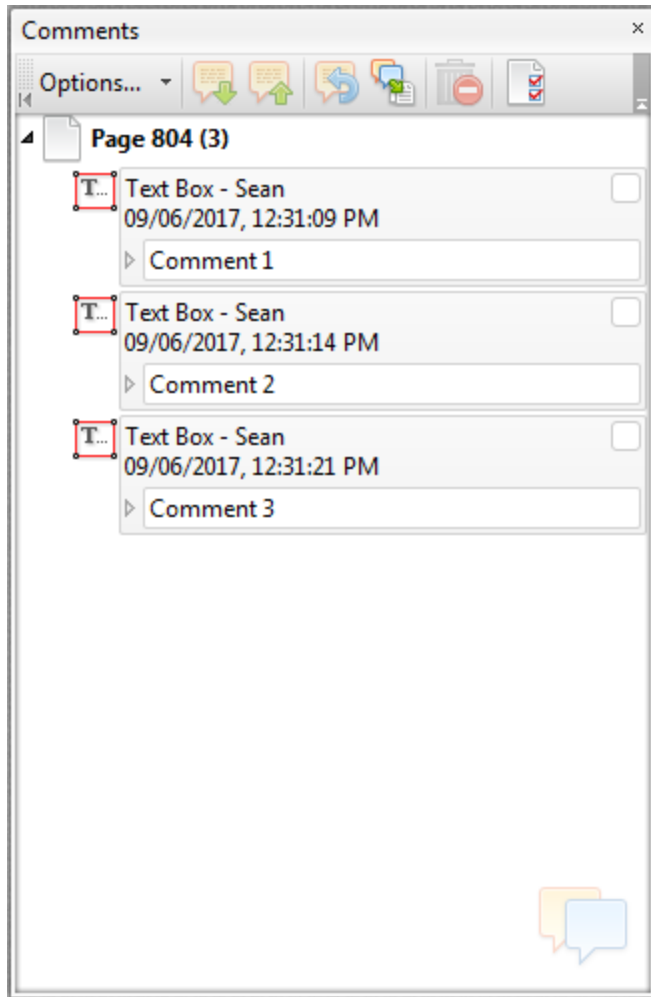
Figure 2. Comments Pane

Click comments in the list to move to their location in the active document. Click **Options** to view comments options:

- Click **Expand All/Collapse All** to expand/collapse groups of comments.
- The **Grouping** options determine the manner in which comments are grouped. Select as desired from the following options:
  - **Page**
  - **Type**
  - **Modification Date**
  - **Creation Date**
  - **Author**
  - **Color**
  - **Subject**
- The **Show** options determine the information that is displayed with each comment in the **Comments** pane. The following options are available:
  - **Subjects**

- **Authors**
- **Dates**
- **Text**
- **Statuses**
- **Colors**
- The **Show Comments** submenu determines the category of comments that are displayed and the display option for pop-ups:
  - Click **Show All Comments** to display all comments.
  - Click **Hide All Comments** to hide all comments.
  - Click **By Type, By Author, Checked or By Status** as desired. Then select an option from the associated submenu.
  - Click **Open/Close All Pop-ups** to open/close all popups associated with comments.
  - Click **Show Comments with Hidden Flag** to show/hide comments that feature a hidden flag.
  - Click **Deselect** to deselect comments currently selected.

Use the icons in the **Comments** pane toolbar to activate the following functions:

- **Next/Previous Comment** to move to the next/previous comment.
- **Add Reply** to add a reply to selected comments.
- **Summarize Comments** to create a summary of all comments contained in the active document. See **here** 615 for further information.
- **Delete** to delete selected comments.
- **Properties** to open the **Properties Pane** 224 for selected comments.

6.3.5.6 Attachments Pane

Attachments Pane

Click **Attachments** to open the **Attachments** pane:
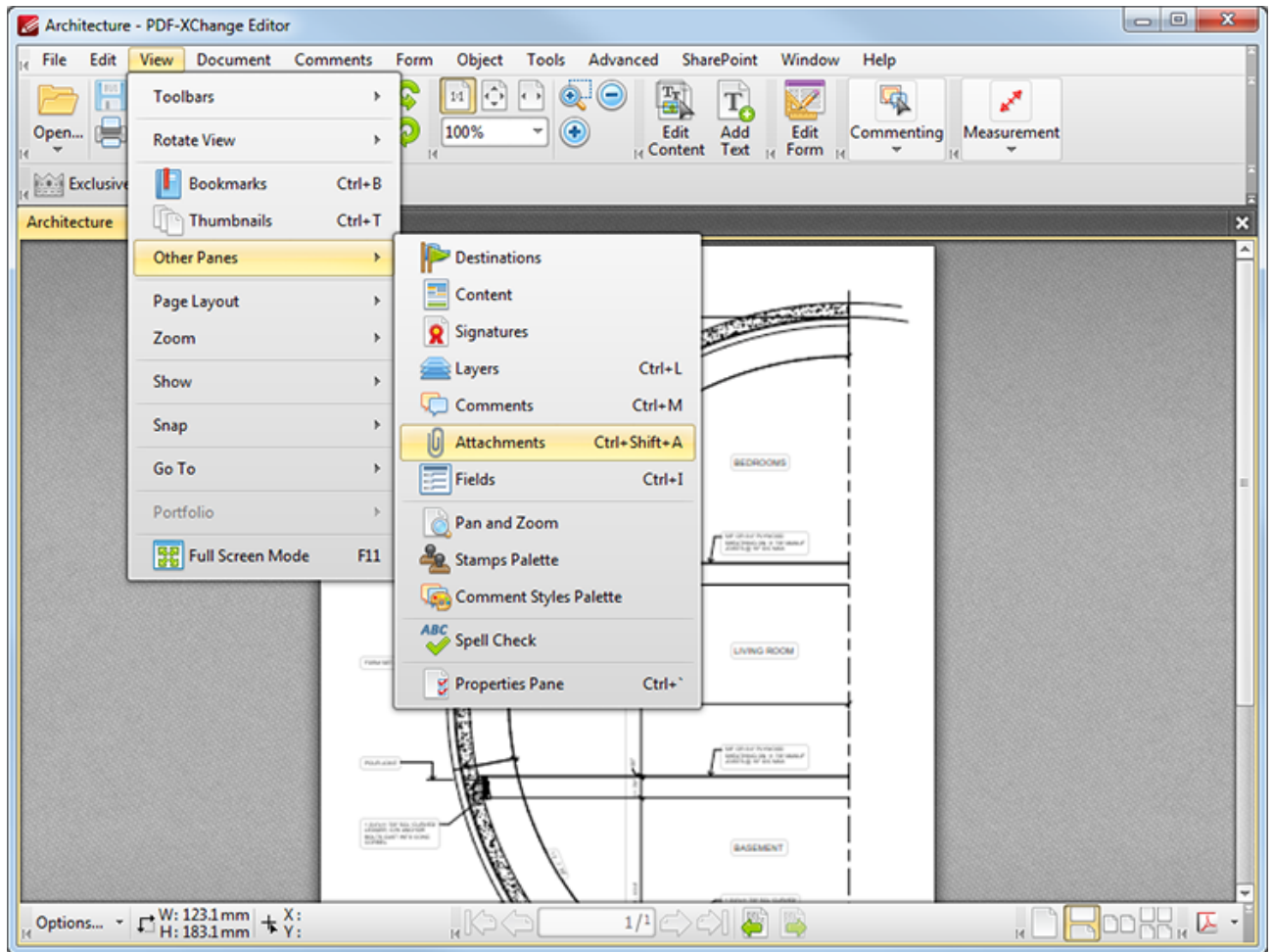
Figure 1. View Tab Submenu. Attachments

The **Attachments** pane details current document attachments and facilitates the creation/removal of attachments:

Figure 2. Attachments Pane

- Click **Options** to open the options submenu. Alternatively, use the links in the **Attachments pane** toolbar. The following options are then available:
  - Click **Open/Save/Delete Attachment** to perform these actions on the attachment currently selected.
  - Click **Edit Description** to edit the description of the attachment currently selected.
  - Click **New Attachment** (or press Insert) to create a new attachment. The **Open Files** dialog box will launch. Select the desired attachment and click **Open** to create a new attachment. Alternatively, drag and drop documents into the **Attachments** pane to add them as an attachment to the current document.
  - Click the links in the **Location in Document** tab to browse to the location of the associated attachment.

6.3.5.7   Fields Pane

Fields Pane

Click **Fields** to open the **Fields** pane:
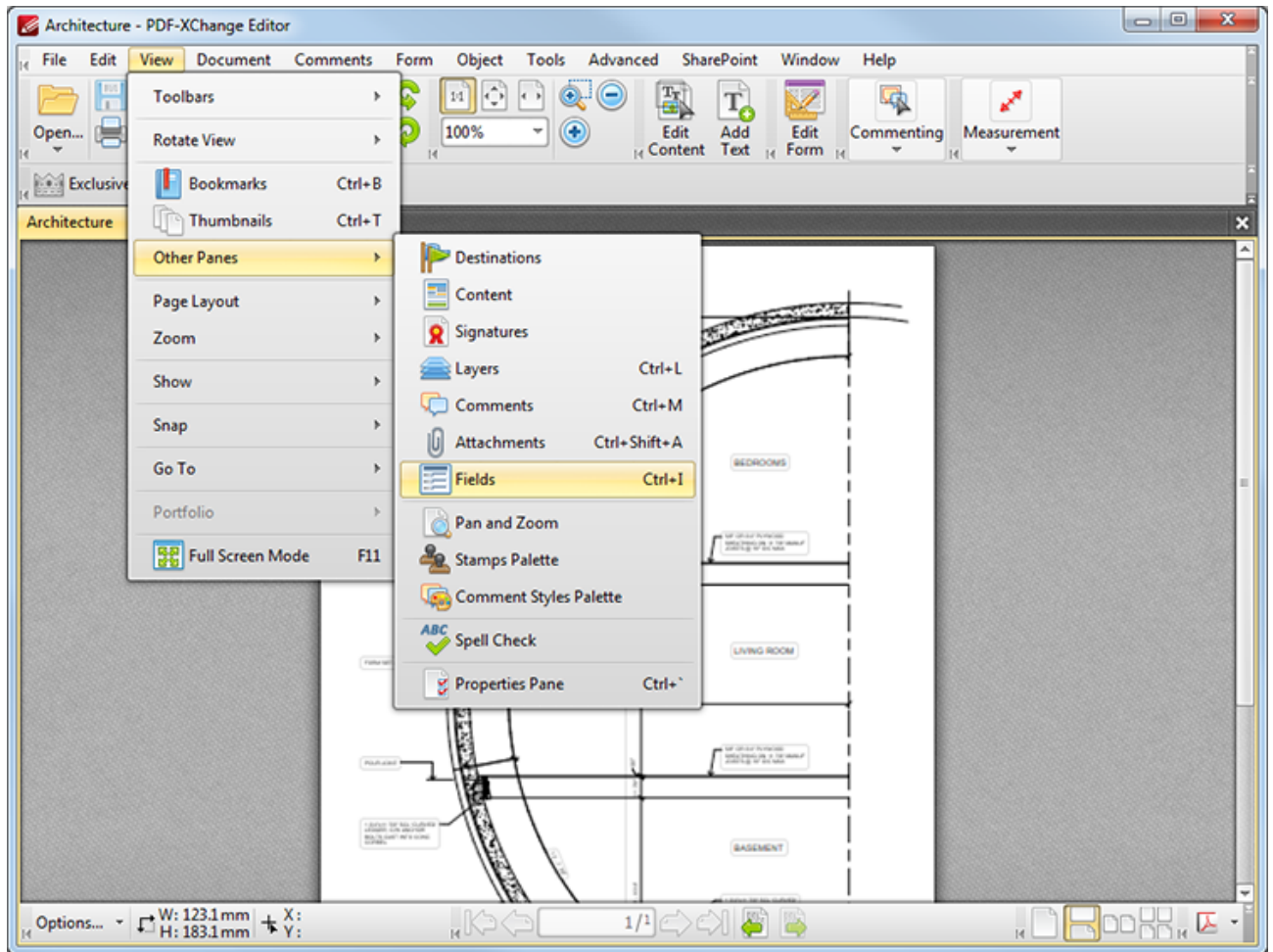
Figure 1. View Tab Submenu. Fields

The **Fields** pane details existing form fields and facilitates their editing:
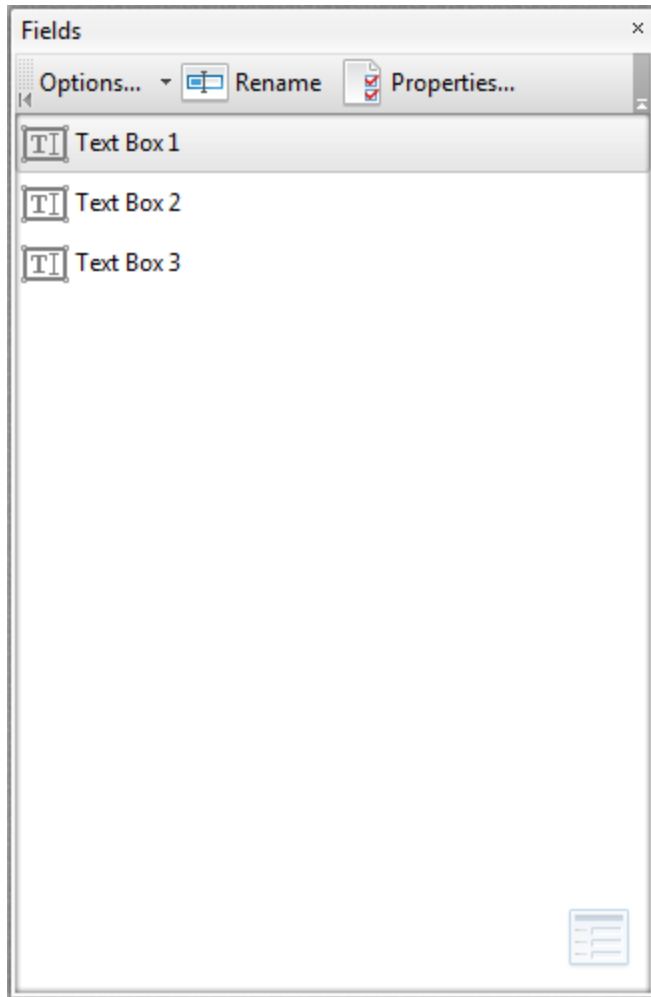
Figure 2. Fields Pane

The **Edit Form** 812 feature is used to create and edit document fields. The options in the **Fields** pane toolbar can be used to access options that relate to forms:

- Click **Options** to view available fields options:
    - Click **Expand All/Collapse All** to expand/collapse selected fields.
    - Click **Alphabetical Order** to enable/disable the alphabetical ordering of fields within the **Fields** pane.
    - Click **Order by Pages** to enable/disable the ordering of fields according to their page number. When this option is enabled the **Tab Order** option is also enabled. Select the desired order from the associated submenu.
    - Click **Rename** to rename the field currently selected.
    - **Set Field Calculation Order** is used 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.
    - **Show Full Fields Name** is used to show the name of the field.

- Click **Properties** to view/edit form properties. Please ensure that the **Edit Form** feature is enabled in order to view form properties, which are detailed **here.** [320]

The keyboard shortcut to show/hide the **Fields** pane is Ctrl+I.

6.3.6   **Page Layout**

Page Layout

Hover over **Page Layout** to view document layout options:
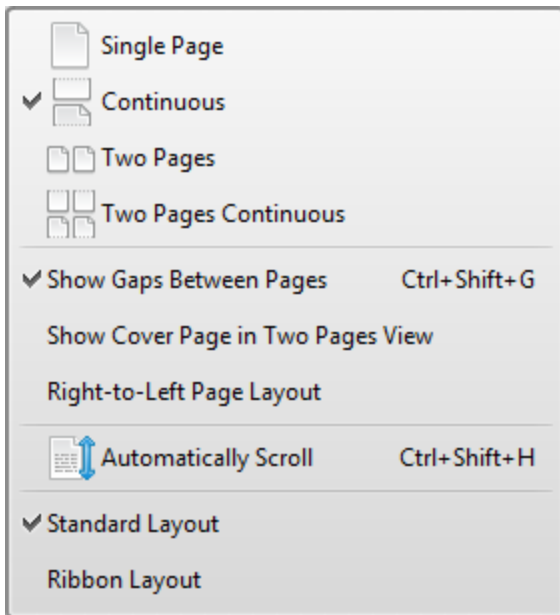
Figure 1. Page Layout Submenu

- Select **Single Page** to view a single page at a time.
- Select **Continuous** to view pages in a single, scrolling column.
- Select **Two Pages** to view two pages at a time.
- Select **Two Pages Continuous** to view two pages at a time in scrolling columns.
- Select **Show Gaps Between Pages** as desired.
- Select **Show Cover Page in Two Pages View** to view the cover page separately from the document when viewing documents in either of the two-page layout modes.
- Select **Right-to-Left Pages Layout** to view pages in right-to-left format when viewing documents in either of the two-page layouts.
- Select **Automatically Scroll** to activate the automatic scrolling feature when viewing documents.
- Select **Standard Layout** to view documents in standard layout, which means pages scroll from top to bottom.

- Select **Ribbon Layout** to view document in ribbon layout, which means pages scroll from left to right.

6.3.7 **Zoom**

Zoom

Hover over **Zoom** to view preset zoom options:
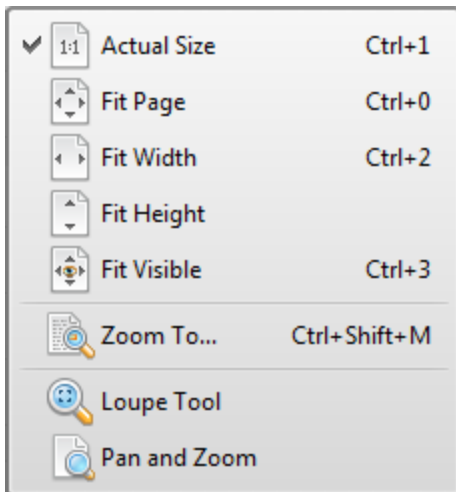
Figure 1. Zoom Submenu

- Click **Actual Size** to view pages in their actual size. The resulting display will take resolution settings into account.
- Click **Fit Page** fits pages to the document window.
- Click **Fit Width** uses the page width to fit pages.
- Click **Fit Height** uses the page height to fit pages
- Click **Fit Visible** uses the visible page area to fit pages and does not show white page margins.
- Click **Zoom To** to select a preset magnification level. The **Zoom To** dialog box will open. Select an option from the dropdown menu and click **OK** to zoom.
- Click **Loupe Tool** to activate the **Loupe Tool.** See **here** ⌐647⌐ for further information.
- Click **Pan and Zoom** to activate the **Pan and Zoom** feature**.** See **here** ⌐650⌐ for further information.

6.3.8 Show

Show

Hover over **Show** to view optional parameters that can be shown/hidden within the user interface:
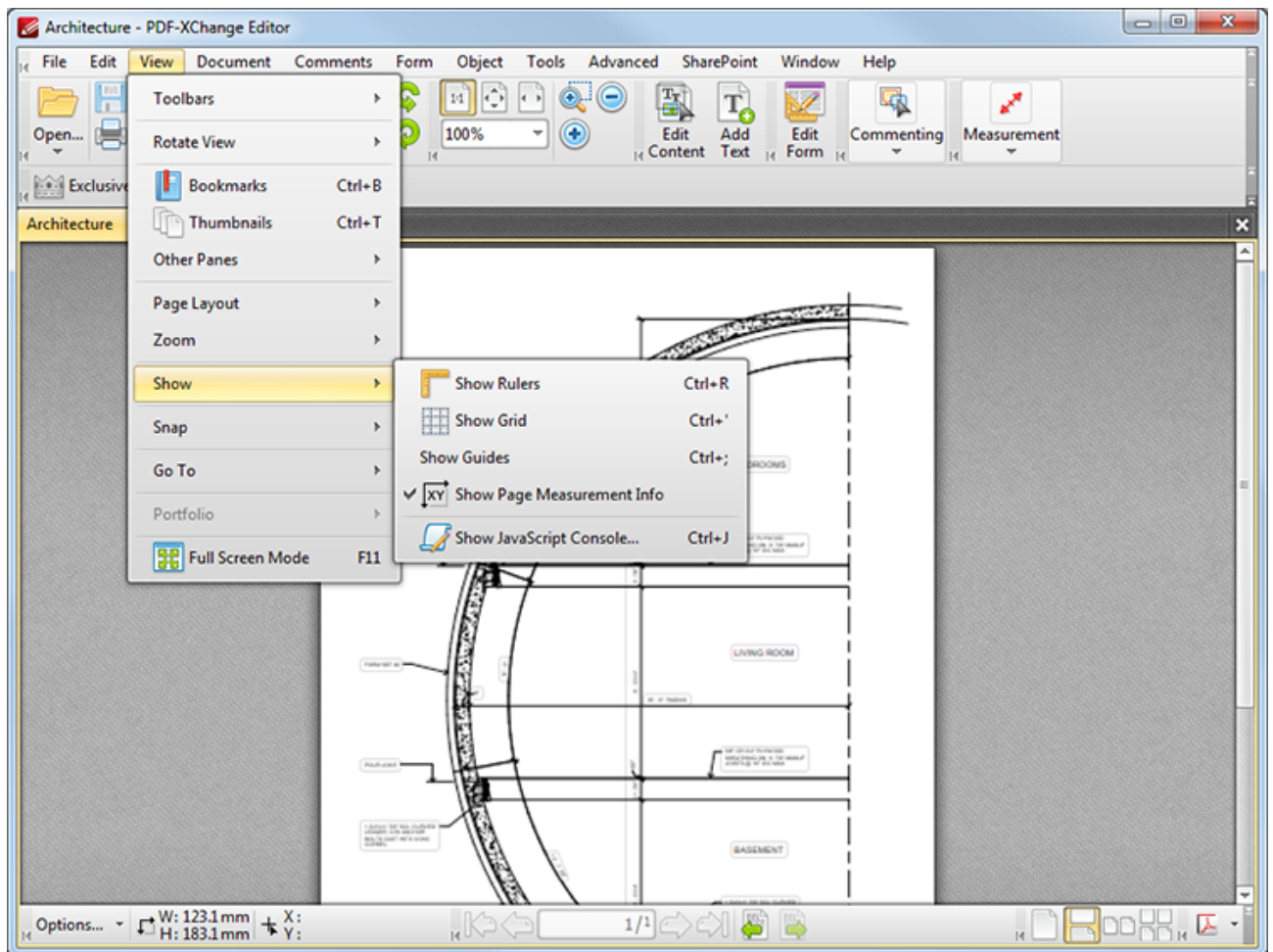
Figure 1. View Tab Submenu. Show

- **Show Rulers** enables/disables rulers along the horizontal and vertical planes in order to facilitate the convenient measurement of elements within the active document. Rulers are displayed in *(figure 2).*

- **Show Grid** enables/diables a grid behind transparent objects in order to assist in the accurate alignment of text and objects, as can be seen in *(figure 2)*.
- **Show Guides** enables/disables guides, which are used in conjunction with rulers to simplify the process of aligning text and objects. Click and drag from a ruler to launch guides. The guides in *(figure 2)* are the red lines.
- Use the **Snap** 528 feature to assist in precise document editing.
- **Show Page Measurement Info** enables/disables the display of the current page size and coordinates of the pointer location, which is shown with the **Document Options Toolbar** 475 on the lower left hand side of the main window. The page measurement info is highlighted in *(figure 2)*.
- **Show JavaScript Console** launches the **JavaScript Console** pane, which facilitates the addition of JavaScript elements to the active document, as in *(figure 3)*.
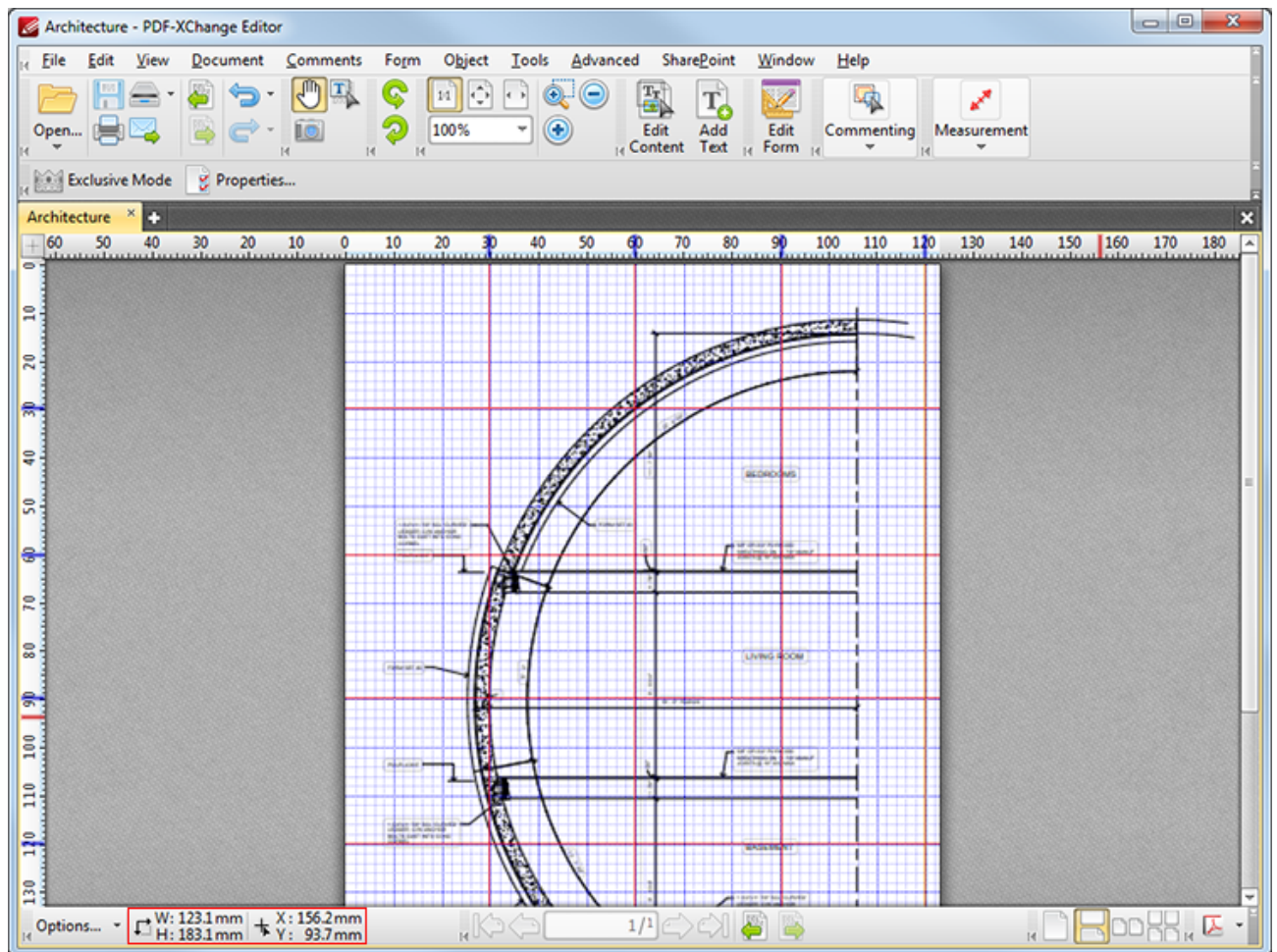
Figure 2. Show Options
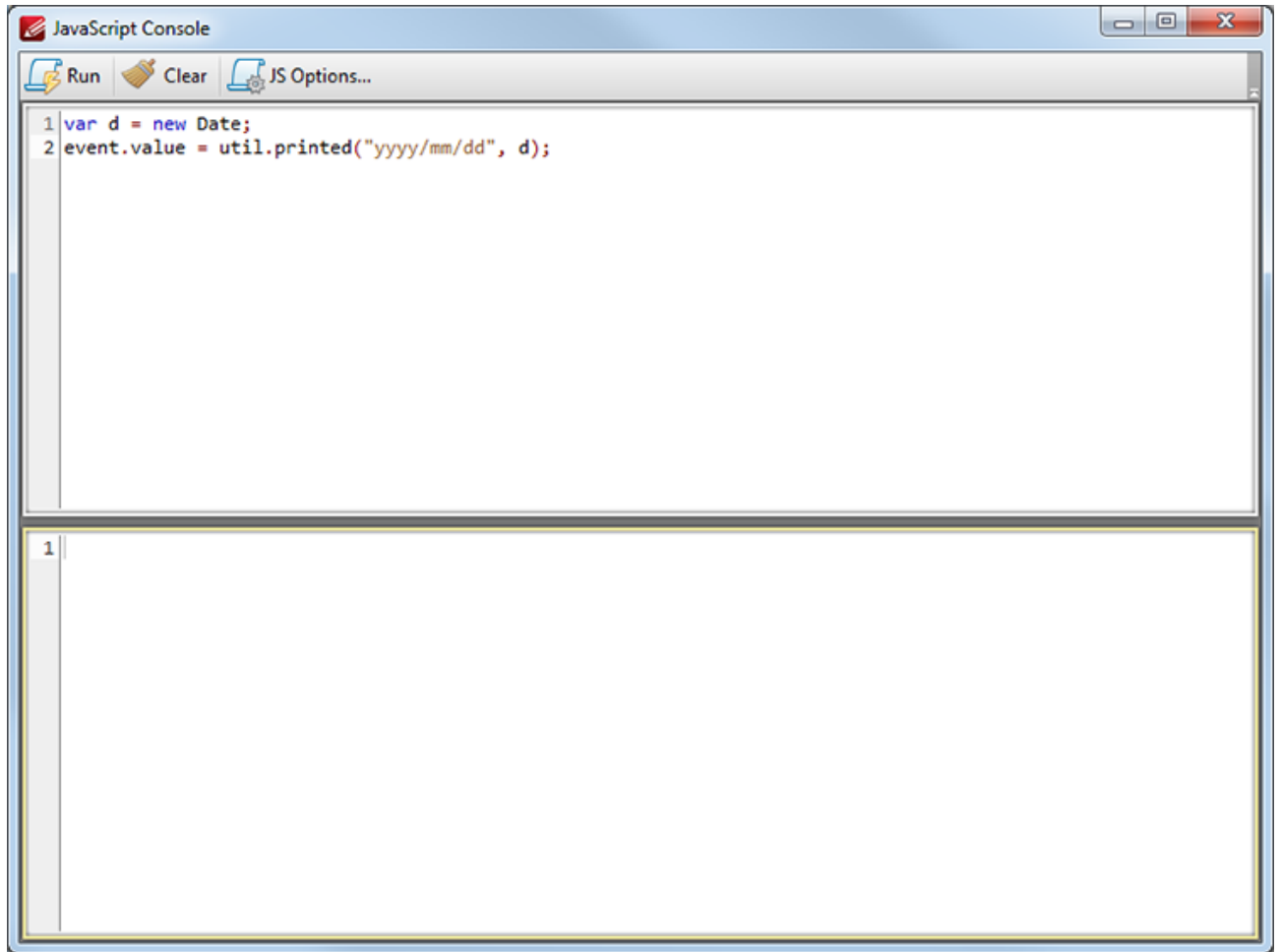
Figure 3. JavaScript Console

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.

- Enter the desired JavaScript into the console.
- 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 **JS Options** to customize JavaScript options. Available options are detailed **here.** [269]
- The keyboard shortcut to launch the JavaScript console is Ctrl+J.
- The **Link Creation Tool** can be used to create links that contain JavaScript, as detailed **here.** [99]

6.3.9 **Snap**

Snap

Hover over **Snap** to view options that relate to the snapping feature of **PDF-XChange Editor:**
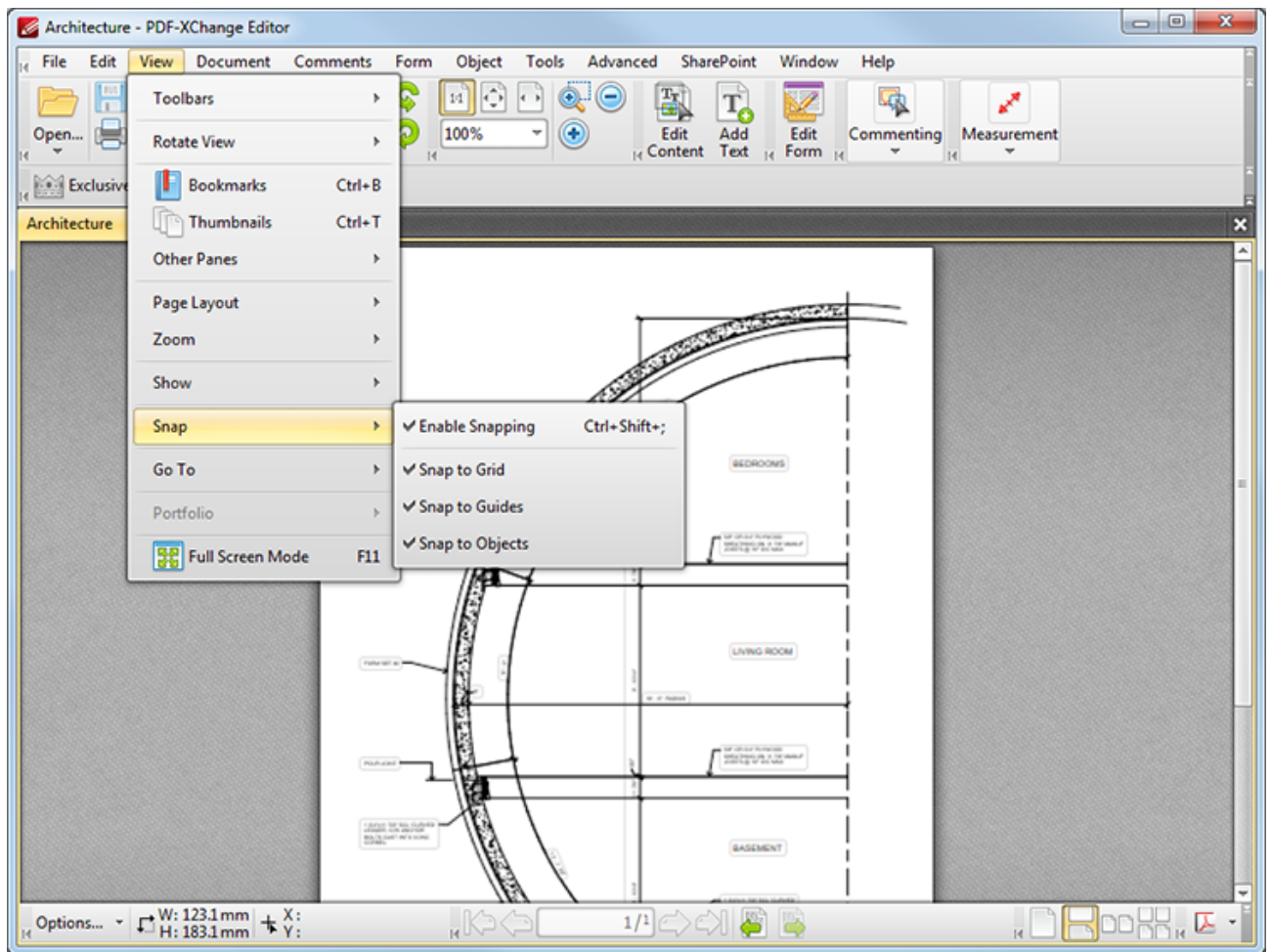
Figure 1. File Tab Submenu. Snap

Snapping is used to assist in the precise measurement of annotations and comments. When snapping is enabled the pointer automatically moves to a snapping point when it is within the given threshold. This means that images and other content can be aligned perfectly when they are edited.

- Click **Enable Snapping** to enable the snapping feature.
- Click **Snap to Grid** to enable snapping to the grids outlined in the **Show** 525 section.
- Click **Snap to Guides** to enable snapping to the guides outlined in the **Show** 525 section.
- Click **Snap to Objects** to enable snapping to existing objects within the active document.

See **here** 262 for further snapping parameters.

6.3.10 Go To

Go To

Hover over **Go To** to view document navigation options:
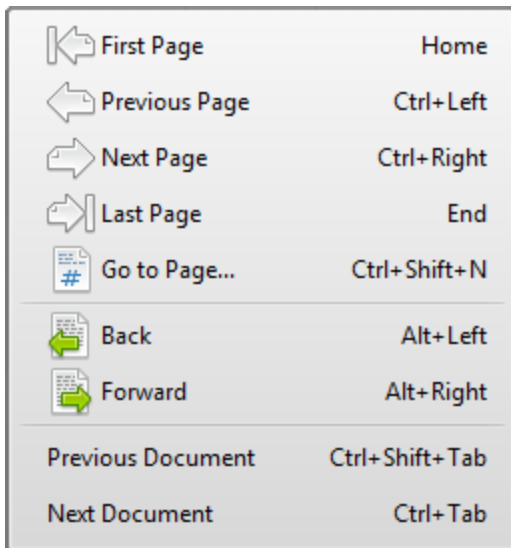
Figure 1. Go To Submenu

- 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 only possible when the **Back** option has been used.
- Click **Previous Document** to move to the previous document.
- Click **Next Document** to move to the next document.

6.3.11 **Portfolio**

Portfolio

Hover over **Portfolio** to view the portfolio file submenu:
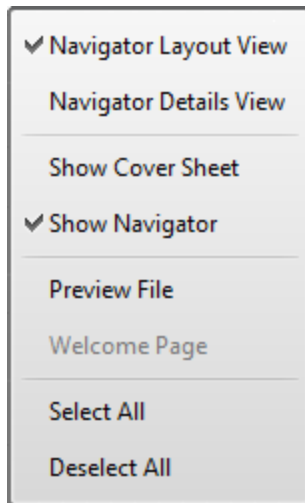
Figure 1. Portfolio File Submenu

These options relate to the view settings for PDF Portfolio files, which are special files that can feature multiple file formats assembled into an integrated PDF unit.

- Click **Navigator Layout View** to view the content of portfolio files in their expanded format.
- Click **Navigator Details View** to display the details of documents contained within the file.
- Click **Show Cover Sheet** to show/hide the portfolio cover sheet.
- Click **Show Navigator** to show/hide the navigator window, which is used to browse through the contents of the portfolio file.
- Click **Preview File** to open the selected file of the portfolio in its default application.
- The **Welcome Page** option is not yet available. It will be available in later builds of **PDF-XChange Editor.**
- Click **Select All** to select all components of the PDF portfolio document.
- Click **Deselect All** to deselect all components of the PDF portfolio document.
- Right-click files within PDF portfolio files to avail of the additional option **Extract from Portfolio,** which extracts and saves a copy of the selected file on the local computer.

6.3.12   Full Screen Mode

Full Screen Mode

Click **Full Screen** to launch full screen mode. See **here** ²⁴¹ for adjustable parameters that relate to full screen mode.

6.4 Document

Document

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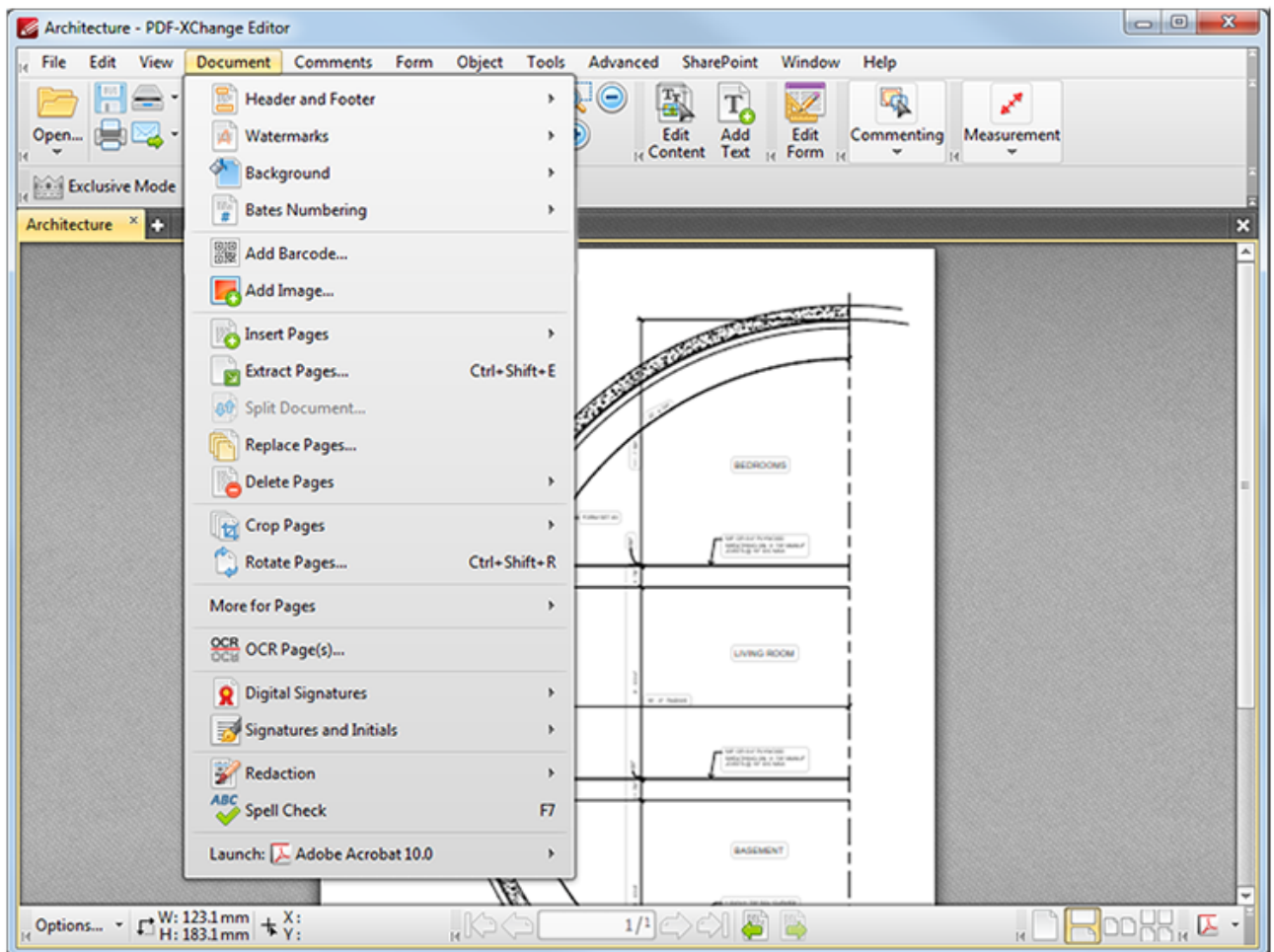
Figure 1. Document Tab Submenu

These options are used to edit documents. Click the links below to access the associated sections of the manual:

- **Header and Footer** 536

- **Watermarks** 539
- **Background** 542
- **Bates Numbering** 545
- **Add Barcode** 549
- **Add Image** 552
- **Insert Pages** 555
- **Extract Pages** 563
- **Split Document** 566
- **Replace Pages** 568
- **Delete Pages** 571
- **Crop Pages** 574
- **Resize Pages** 582
- **Rotate Pages** 578
- **More for Pages** 580
- **Split Pages** 591
- **Number Pages** 585
- **OCR Pages** 594
- **Digital Signing** 597
- **Signatures and Initials** 601
- **Redaction** 603
- **Spell Check** 607
- **Launch** 609

Additionally, see the **Document Operations Guide** 66 for further information and step-by-step instructions to using these features.

6.4.1 Header and Footer

Header and Footer

Hover over **Header and Footer** to view options:
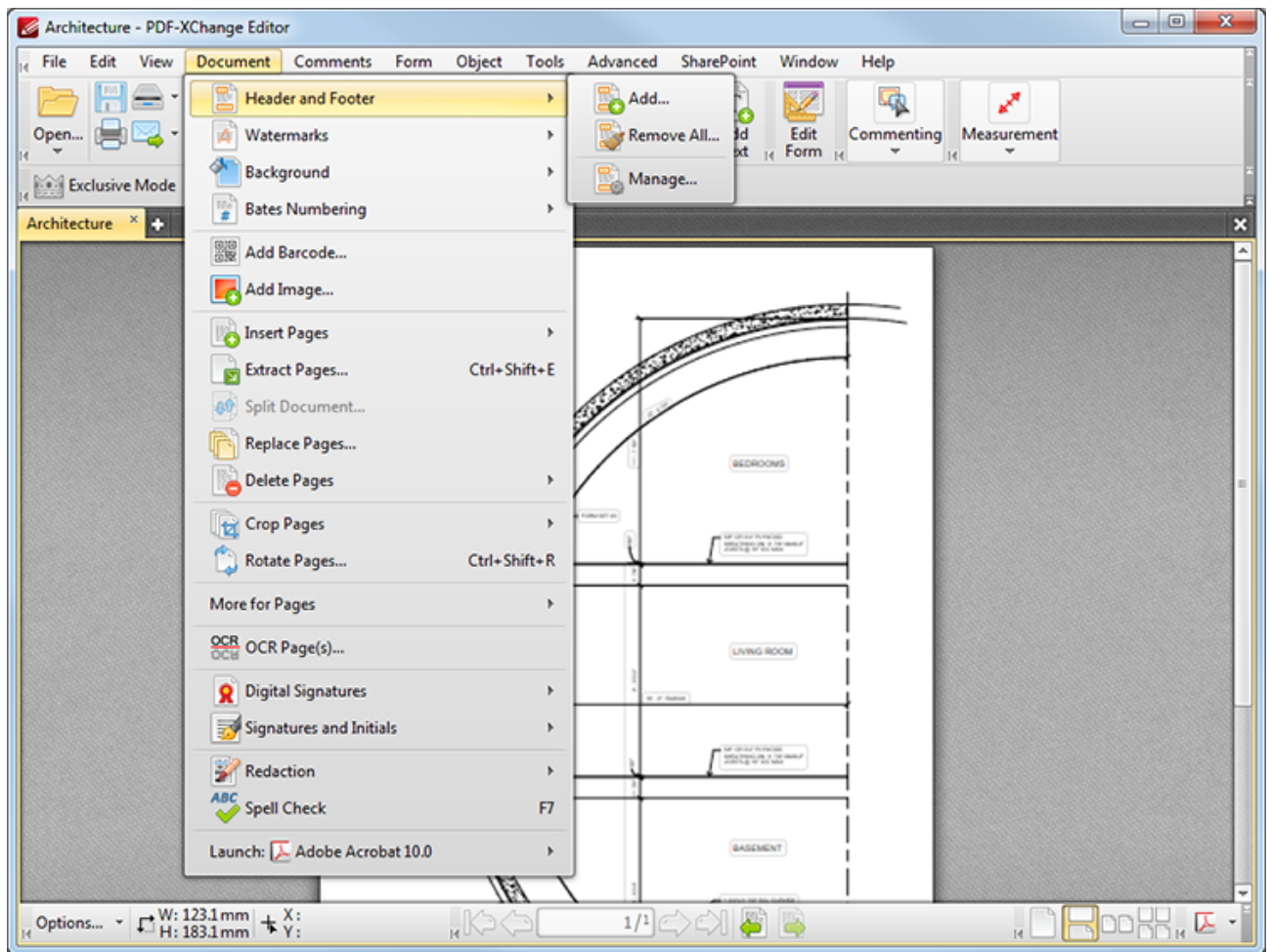
Figure 1. Document Tab Submenu. Header and Footer

Click **Add** to add new headers and footers. The following dialog box will open:

Figure 2. Add Header and Footer Dialog Box

- Enter text into the text boxes to insert text at the locations indicated within documents. Click **Font** and **Insert Date** to select the font settings and/or insert the date at the time of document creation. See **here** 181 for further information about font settings.
- Use the **Margins** settings to reposition the location of header/footers.
- Click **Insert Page Number** to add page numbers at the selected header/footer location.
- Click **Page Number And Date Format** to customize the date format, page number format and start page number options.
- Enter page numbers into the **Preview Page** box to view pages in the preview window.
- Select the required box for page numbers (**Left Header Text, Left Footer Text** etc) and then click **Insert Page Number** to insert page numbers.
- Click **Page Range Options** to select the pages of the document that will feature the details entered above.
- When the desired settings have been entered, click **OK** to create new headers and footers.

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

- Click to save customized settings.

- Click to remove customized settings.
- Click to manage customized settings that have been saved previously.

Remove All

Click **Remove All** to remove all existing headers and footers.

Manage

Click **Manage** to manage existing headers and footers.

6.4.2 **Watermarks**

Watermarks

Watermarks are used predominantly to discourage document counterfeiting. Hover over **Watermarks** to view options:
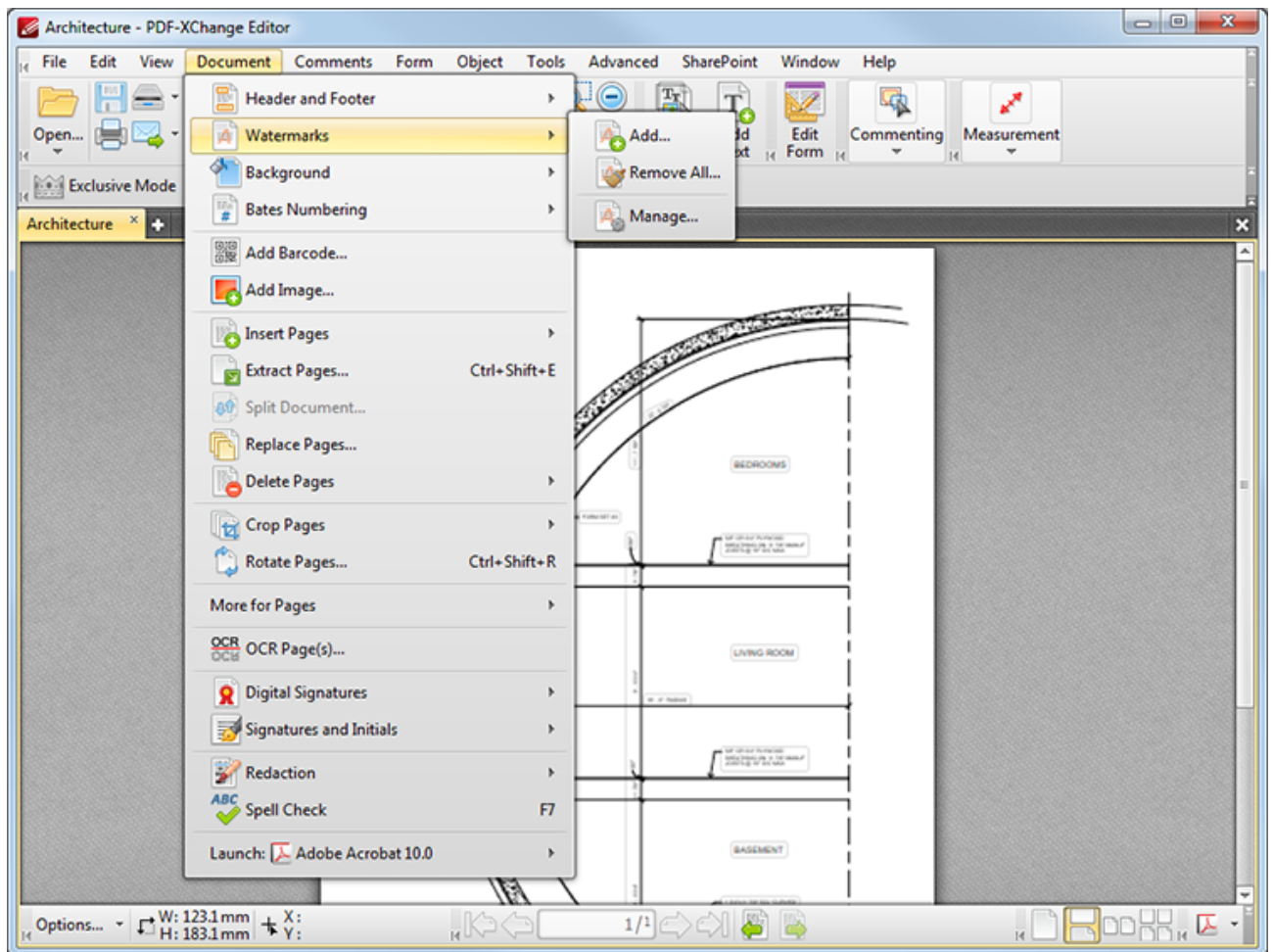
Figure 1. Document Tab Submenu. Watermarks

Click **Add** to add new watermarks:
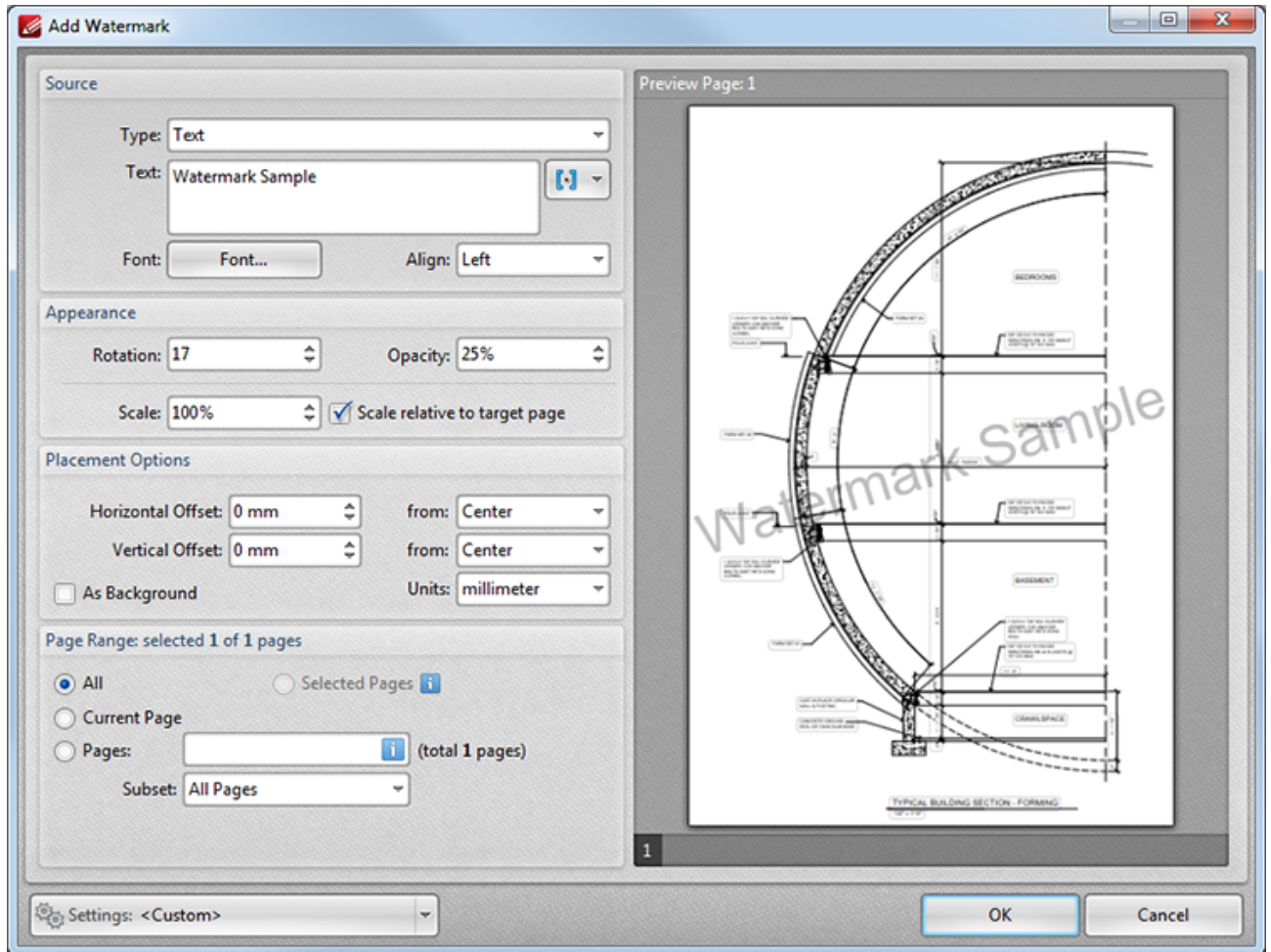
Figure 2. Add Watermark Dialog Box

- The **Source** options determine the source of the watermark. Enter text into the box or select a file. If using text as the source then select the desired font, **macro** [830] and alignment options.
- The **Appearance** options determine the rotation, opacity and scale of the watermark:
  - The **Rotation** value determines the rotation of the watermark in degrees.
  - The **Opacity** value determines the opacity (transparency) of the watermark.
  - The **Scale** value determines the scale of the watermark in relation to either the target pane, if the indicated box is selected, or the size of the original image, if the box is cleared.
- The **Placement** options determine the horizontal and/or vertical offset of the watermark from the left, right or center of the document.
- Select the **As Background** box to insert the watermark into the background as opposed to the foreground of the document.
- The **Pages Range** options are as follows:
  - Select **All** to add watermarks to every page.
  - Select **Current Page** to add a watermark to only the current page.
  - Use the **Pages** box to determine watermarks for specific pages. See **here** [860] for further information.

- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Preview Page** pane displays a preview of pages. Select the numbers beneath the window to preview corresponding pages within the document.
- When the desired settings have been entered, click **OK** to create new watermarks.

The **Settings** menu features two presets: **Draft** and **Confidential**. Select these to update the text that appears behind the document. Click the dropdown menu for further options:

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

Click **Remove All** to remove all watermarks.

Click **Manage** to manage existing watermarks.

6.4.3 Background

Background

Hover over **Background** to view the following submenu:
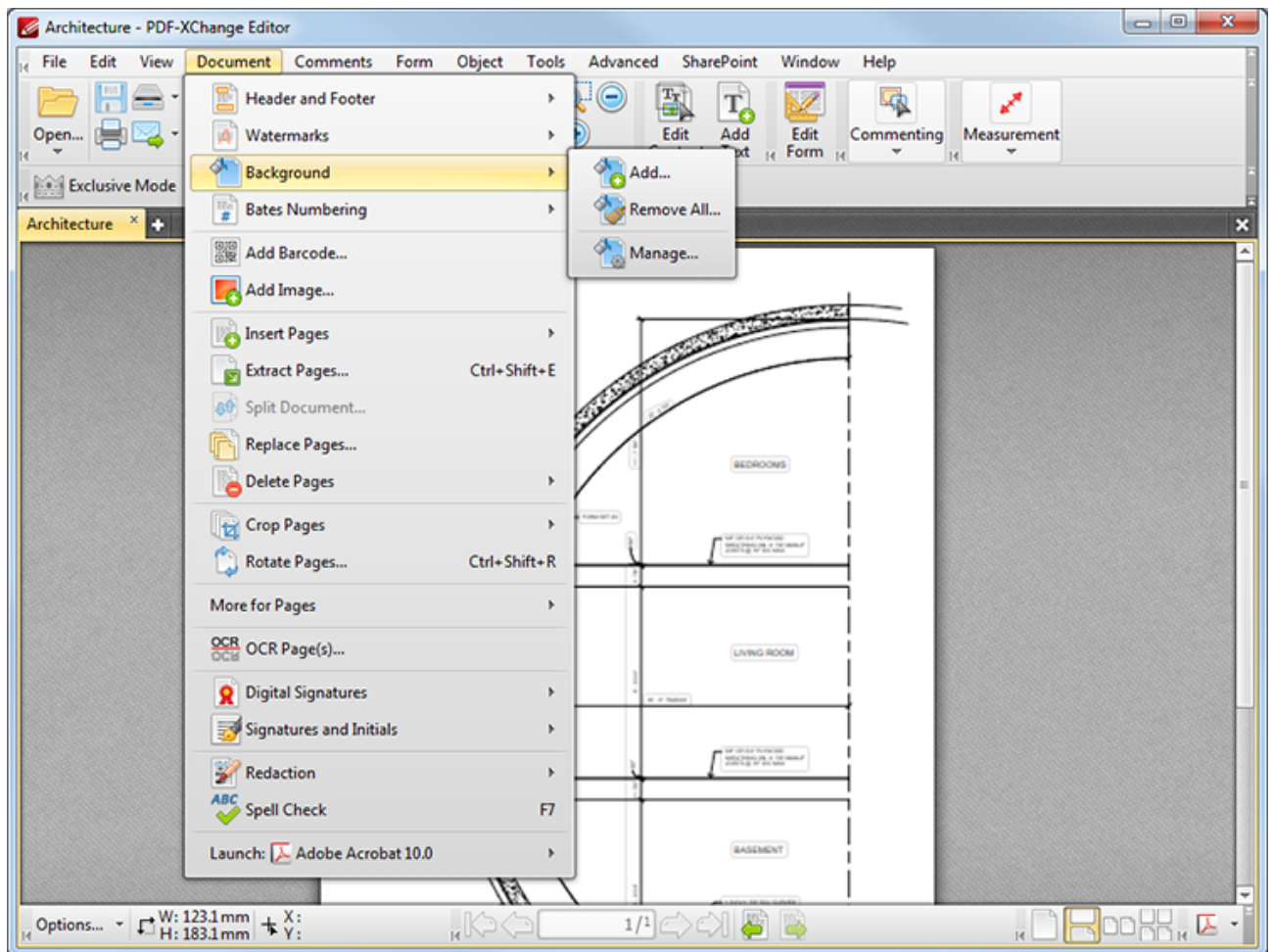
Figure 1. Document Tab Submenu. Background

Click **Add** to add new backgrounds. The following dialog box will open:
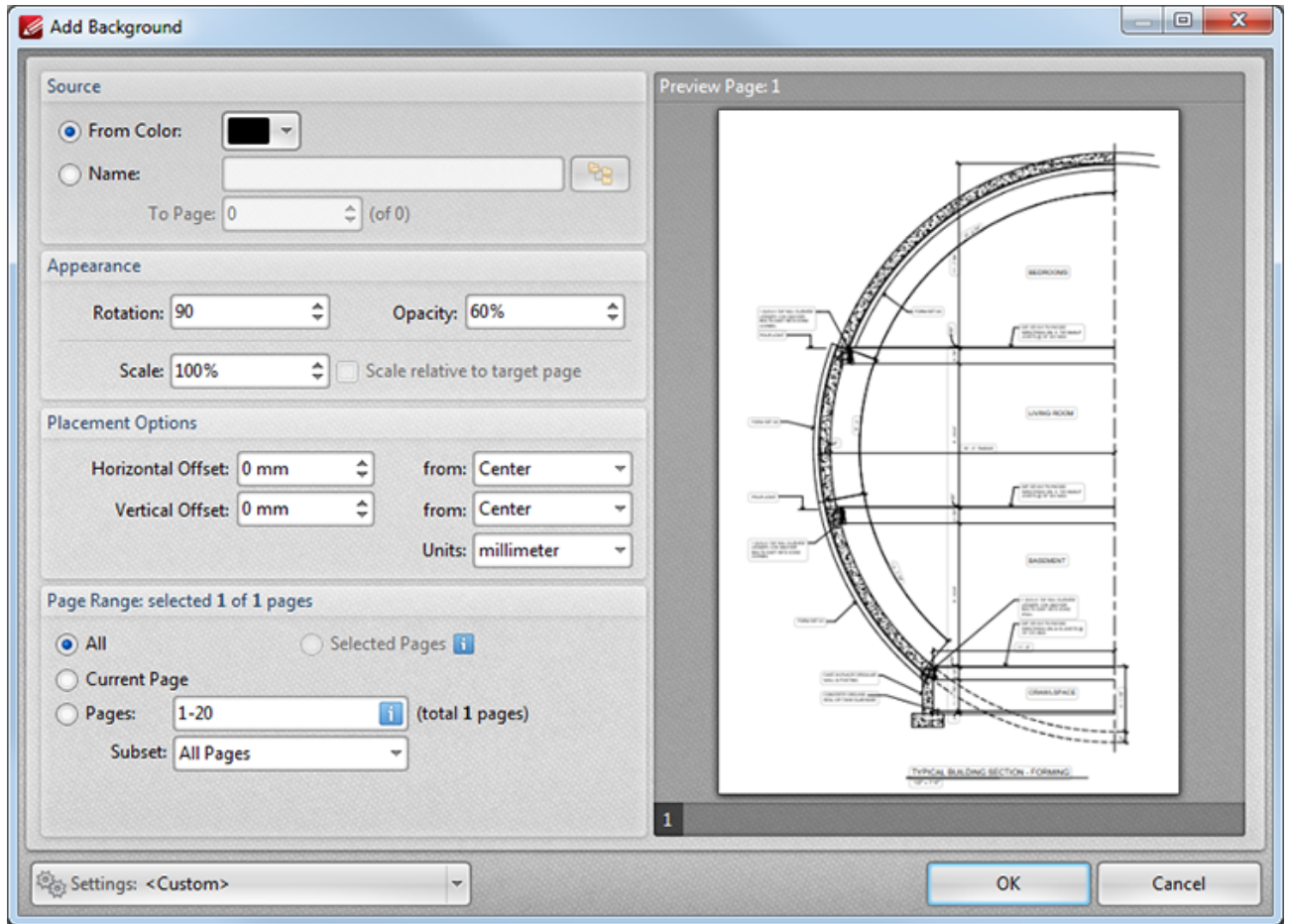
Figure 1. Add Background Dialog Box

- The **Source** options determine the source of the background:
  - Select **From Color** to select a color-based background.
  - Select **Name** to enter a file to be used as the background, or click the icon to select a file from the local computer.
  - Use the **To Page** number box to select the page of the document selected in the **Name** section to be used as the background.
- The **Appearance** options determine the rotation, opacity and scale of the background:
  - The **Rotation** value determines the rotation of the background in degrees.
  - The **Opacity** value determines the opacity (transparency) of the background.
  - The **Scale** value determines the scale of the background in relation to either the target pane, if the box is selected, or the size of the original image, if the box is cleared.
- The **Placement** options determine the horizontal and/or vertical offset of the background from the left, right or center of the document.
- Select the **As Background** box to insert the watermark into the background as opposed to the foreground of the document.
- The **Pages Range** options are as follows:
  - Select **All** to add backgrounds to every page.
  - Select **Current Page** to add a background to only the current page.

- Use the **Pages** box to determine backgrounds for specific pages. See **here** ₈₆₀ for further information.
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Please note that it is possible to create more than one background for pages within the same document as long as they are not located within the same page/page range.
- The **Preview Page** pane displays a preview of pages. Select the numbers beneath the window to preview corresponding pages within the document.
- When the desired settings have been entered, click **OK** to create new backgrounds.

The **Settings** dropdown menu is used to save/manage customized settings:

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

When the desired settings have been entered, click **OK** to create the background.

Click **Remove All** to remove all backgrounds.

Click **Manage** to manage existing backgrounds.

6.4.4   **Bates Numbering**

Bates Numbering

Bates numbering is a dynamic way to provide identification, protection and automatic consecutive numbering within documents as they are processed/scanned. Hover over **Bates Numbering** to view options:
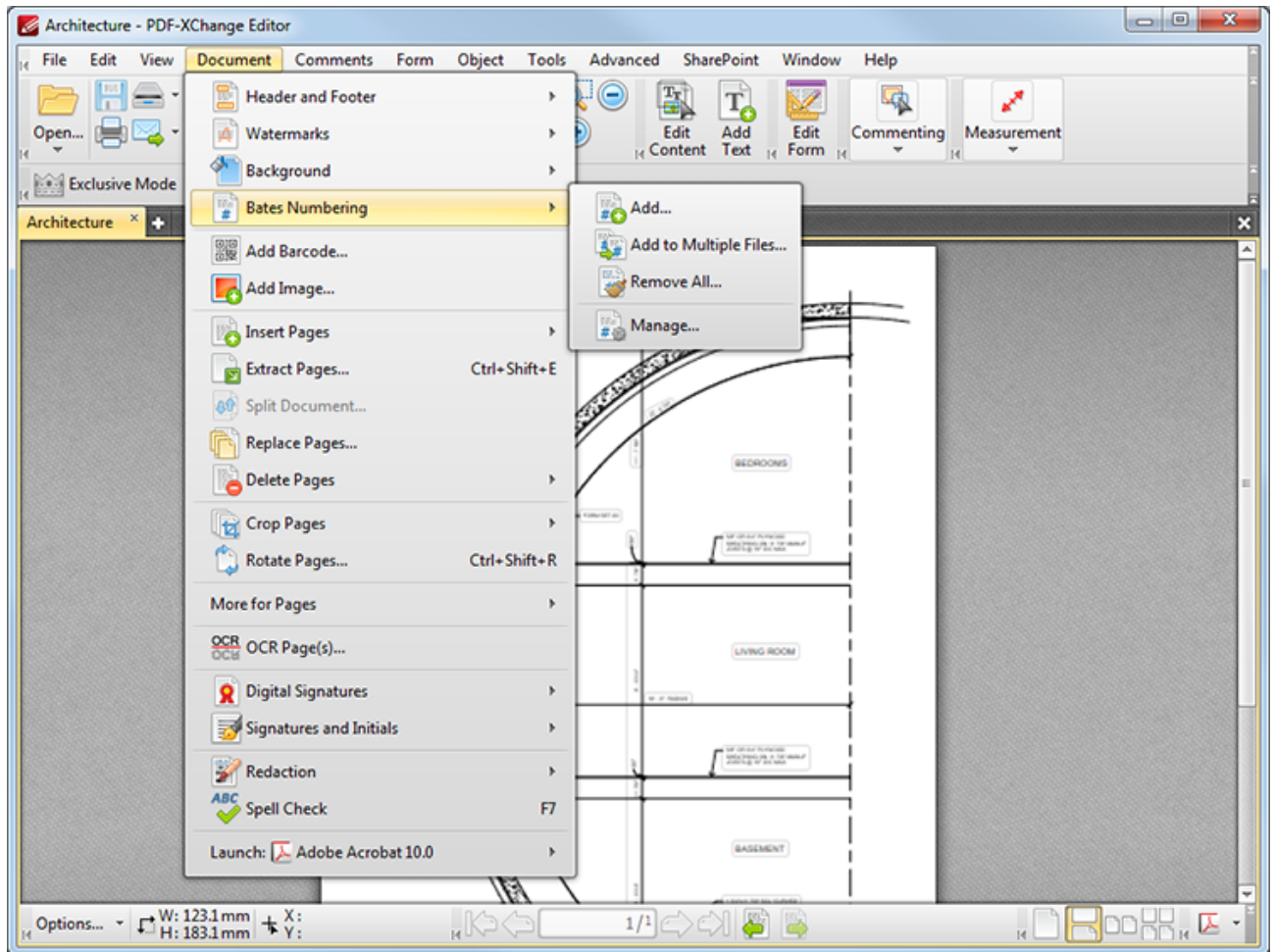
Figure 1. document Tab Submenu. Bates Numbering

Click **Add** to add new Bates numbering to documents:

Figure 2. Add Bates Numbering Dialog Box

- Enter text into the text boxes to insert text at the locations indicated within documents. Click **Font** and **Insert Date** to select the font settings and/or insert the date at the time of document creation. See **here** 181 for further information on font settings.
- Click **Add Bates Numbering** to select Bates numbering options.
- Click **Page Number And Date Format** to customize the date format, page number format and start page number options for Bates numbering.
- Click **Margins** to adjust the text location.
- Enter page numbers into the **Preview Page** box to view pages in the preview window.
- Click **Page Range Options** to select the pages of the document that will feature the customized information entered in the steps above.
- When the desired settings have been entered, click **OK** to insert Bates numbering.

The **Settings** dropdown menu is used to save/delete customized settings for subsequent use and/or manage existing customized settings:

- Click ⊞ to save the current settings.
- Click 🔘 to delete the custom settings currently selected.

- Click ⚙ to manage settings that have been saved previously.

Click **Add to Multiple Files** to add Bates numbering to multiple files simultaneously. The following dialog box will open:
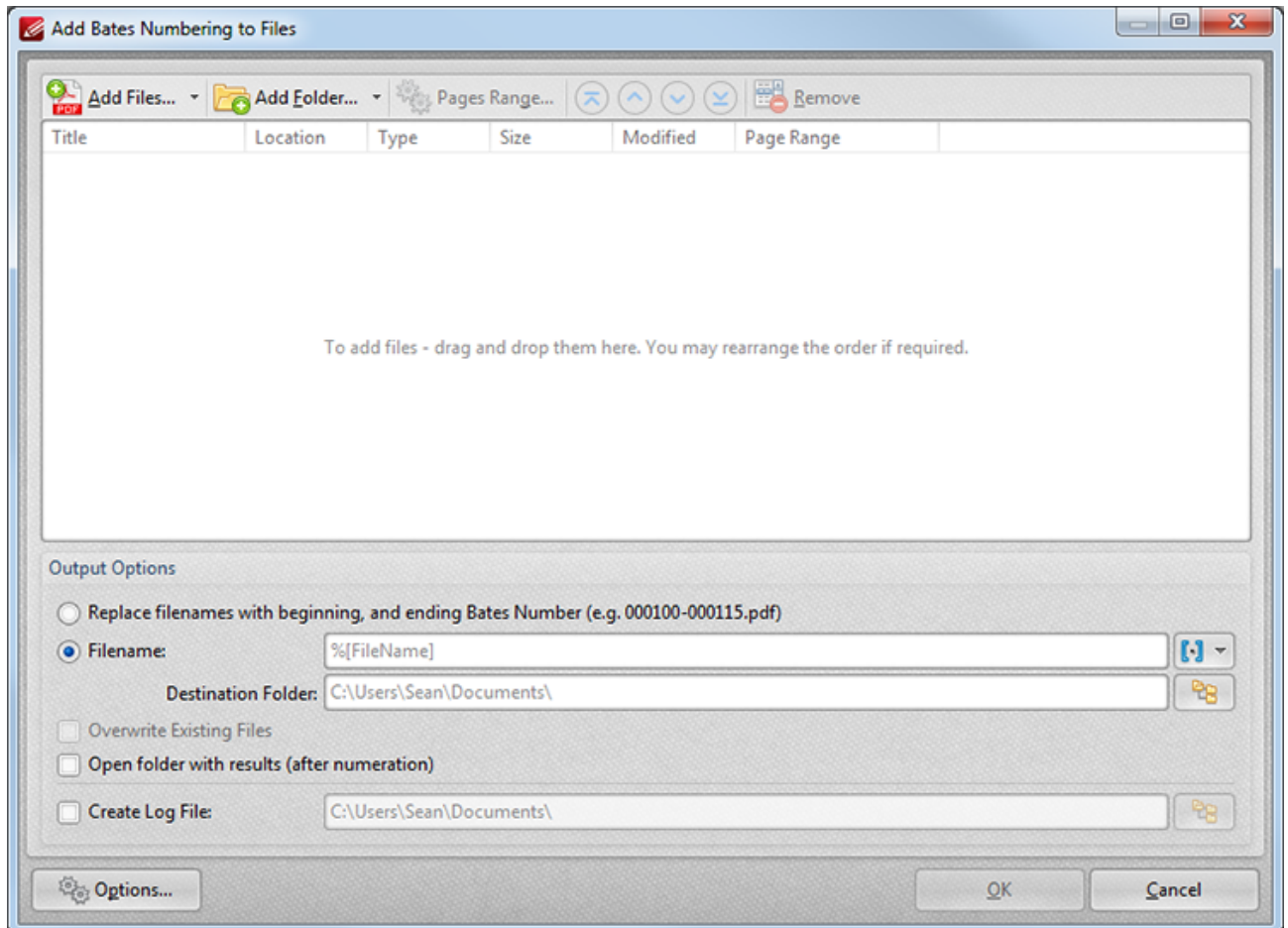
Figure 3. Add Bates Numbering to Files Dialog Box

- Click **Add Files** to add files from the local computer to the list of source files.
- Click **Add Folder** to add all files from the folder specified to the list of source files.
- Select individual files and then click **Pages Range** to determine the pages that will feature Bates numbering. See **here** 860 for further information.
- Select **Replace file names with starting and ending Bates number** as desired.
- Alternatively, select the **File Name** option button and enter a custom file name and destination folder. Click the blue icon to include **macros.** 830
- Select **Overwrite Existing Files** to overwrite old files that have the same name as new files.
- Select **Open folder with results after the numeration** to launch the containing folder when the process is complete.
- Select **Create Log File** as desired. Use the icon to select the folder to which the log file will be saved.

- Click **Options** to determine the Bates numbering options as detailed in *(figure 2)* above.
- When the desired settings have been entered, click **OK** to insert Bates numbering.

Click **Remove All** to remove Bates numbering from documents.

Click **Manage** to manage existing Bates numbering.

6.4.5   **Add Barcode**

Add Barcode

Barcodes provide useful information that barcode readers and mobile devices such as smartphones and tablets can access. Click **Add Barcode** to add barcodes to documents:
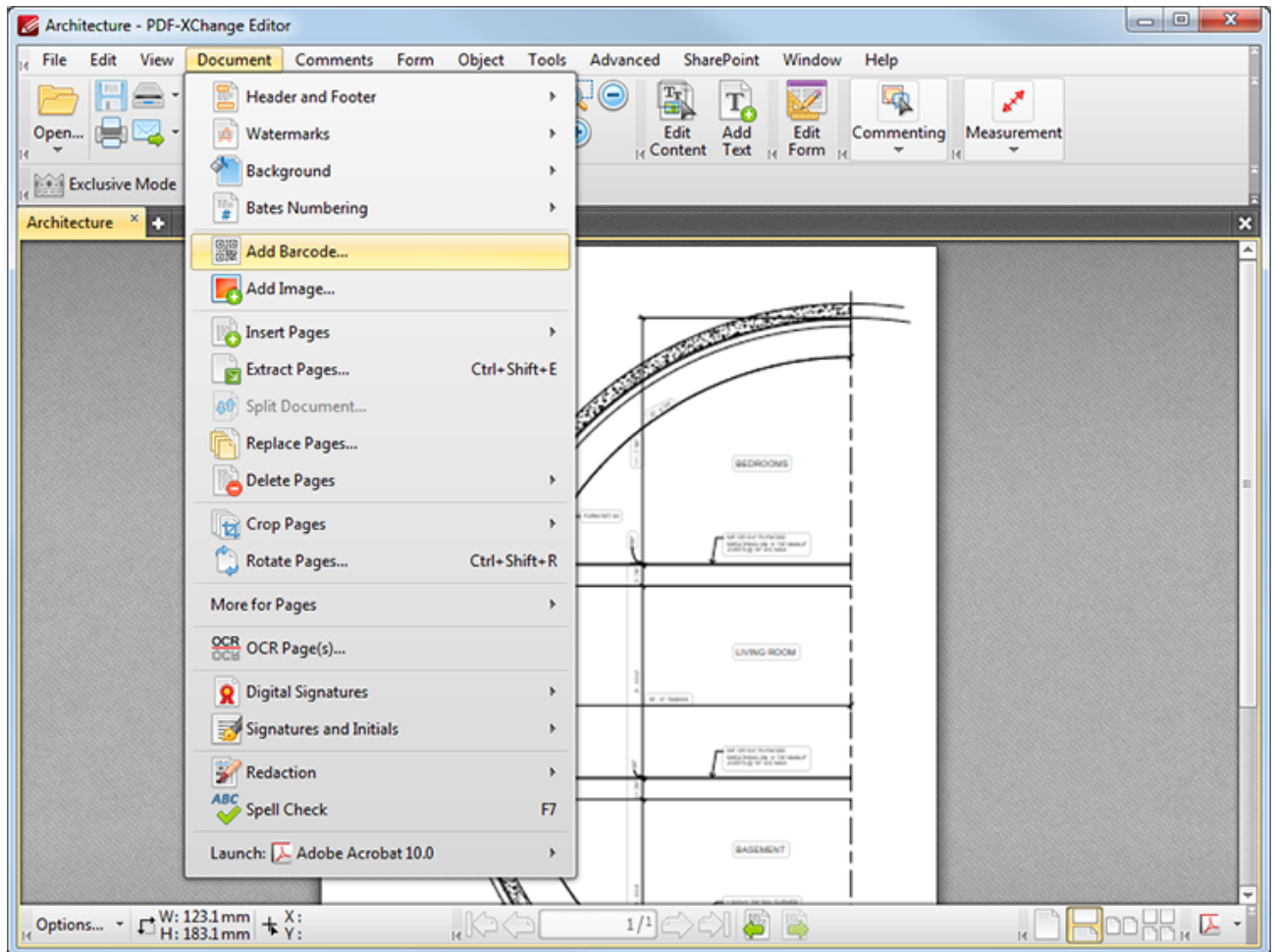
Figure 1. Document Tab Submenu. Add Barcode

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 barcode size and location. The following dialog box will open:
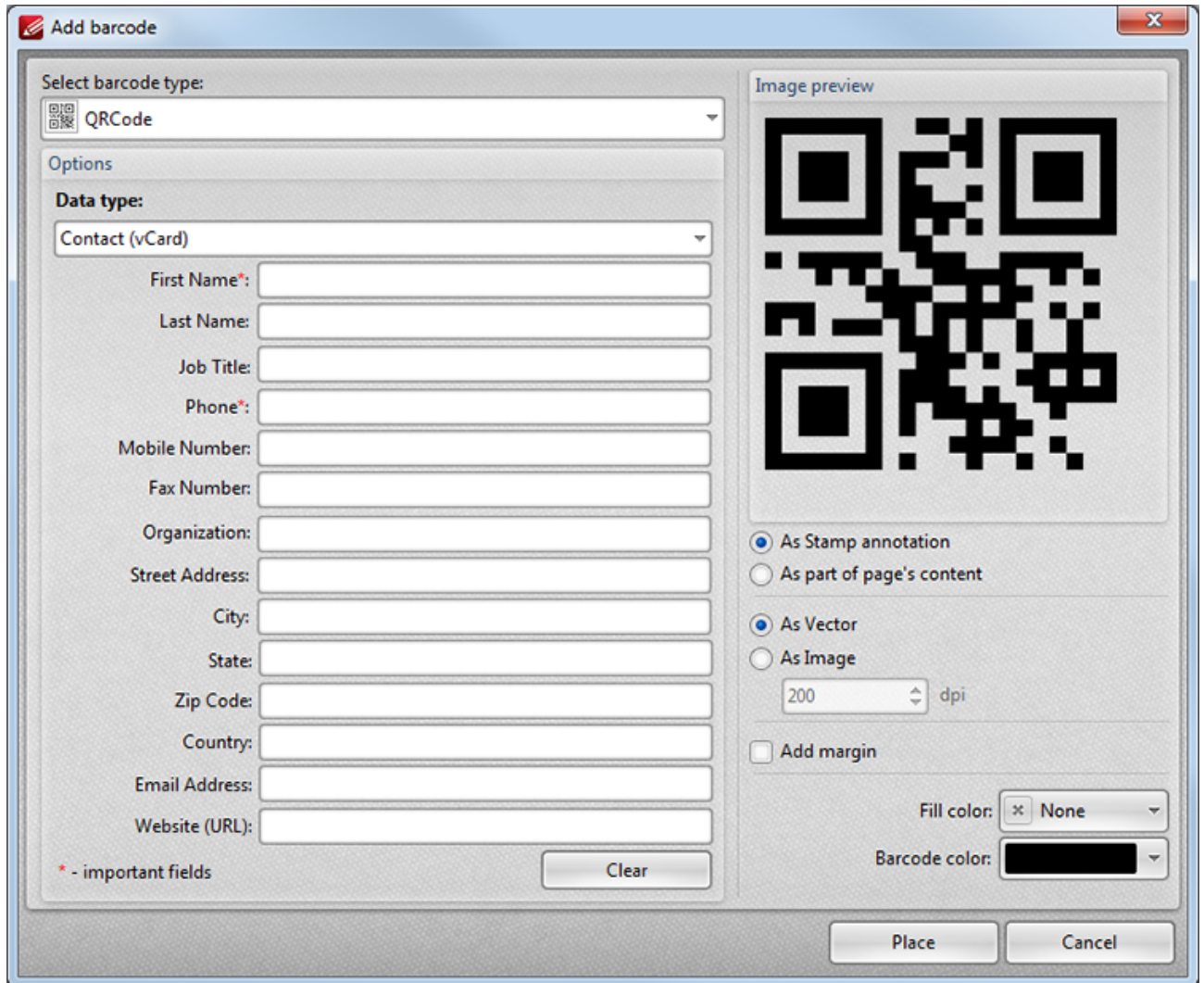
Figure 2. Add Barcode Dialog Box

- Use the **Data type** menu to select the format of the data to be used for the barcode. The choice made at this point determines the remaining options:
    - **Contact (vCard)** is a file format standard for electronic business cards.
    - **URL** is an internet address.
    - **Free Text** allows the user to enter customized text.
    - The **Email** option is used to send an email via barcode.
- When details have been entered using the options above, the associated barcode will be generated automatically and can be seen in the preview pane.
- Select an option button to determine whether the barcode will be added **As Stamp annotation** or **As part of page's content**.
- Select an option button to determine whether the barcode will be added **As Vector** or **As Image**.
- Select the **Add Margin** box to add a margin to the barcode.
- Select the required **Fill colour** and **Barcode color**.

- When the desired details have been entered, click **Place** to add the barcode to the document. The details entered will then be accessible to users with the technology to read barcodes.

6.4.6 **Add Image**

Add Image

Click **Add Image** to add images to documents:
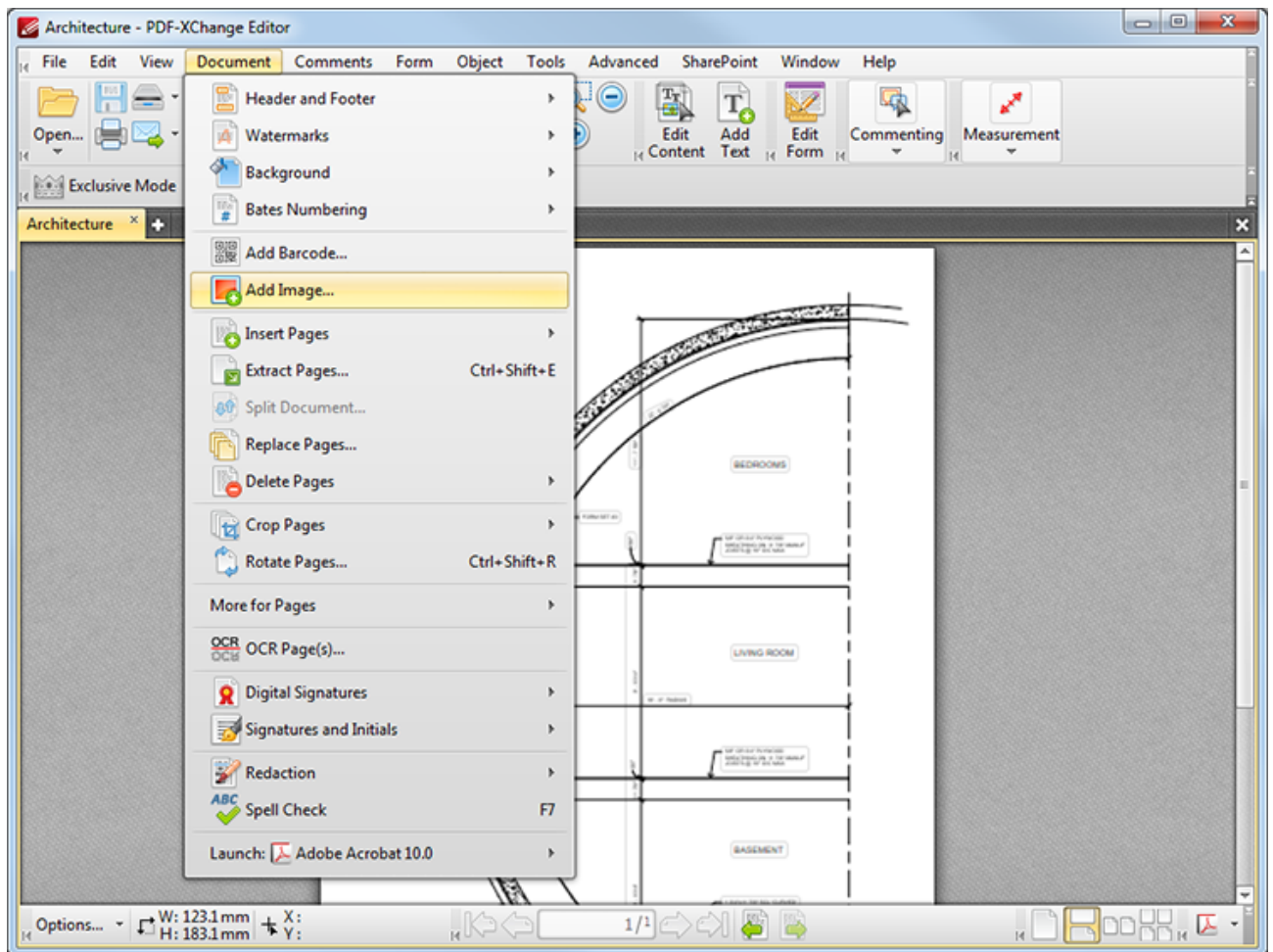
Figure 1. Document Tab Submenu. Add Image

The **Open Files** dialog box will open. Select an image from the local computer. The following dialog box will open:
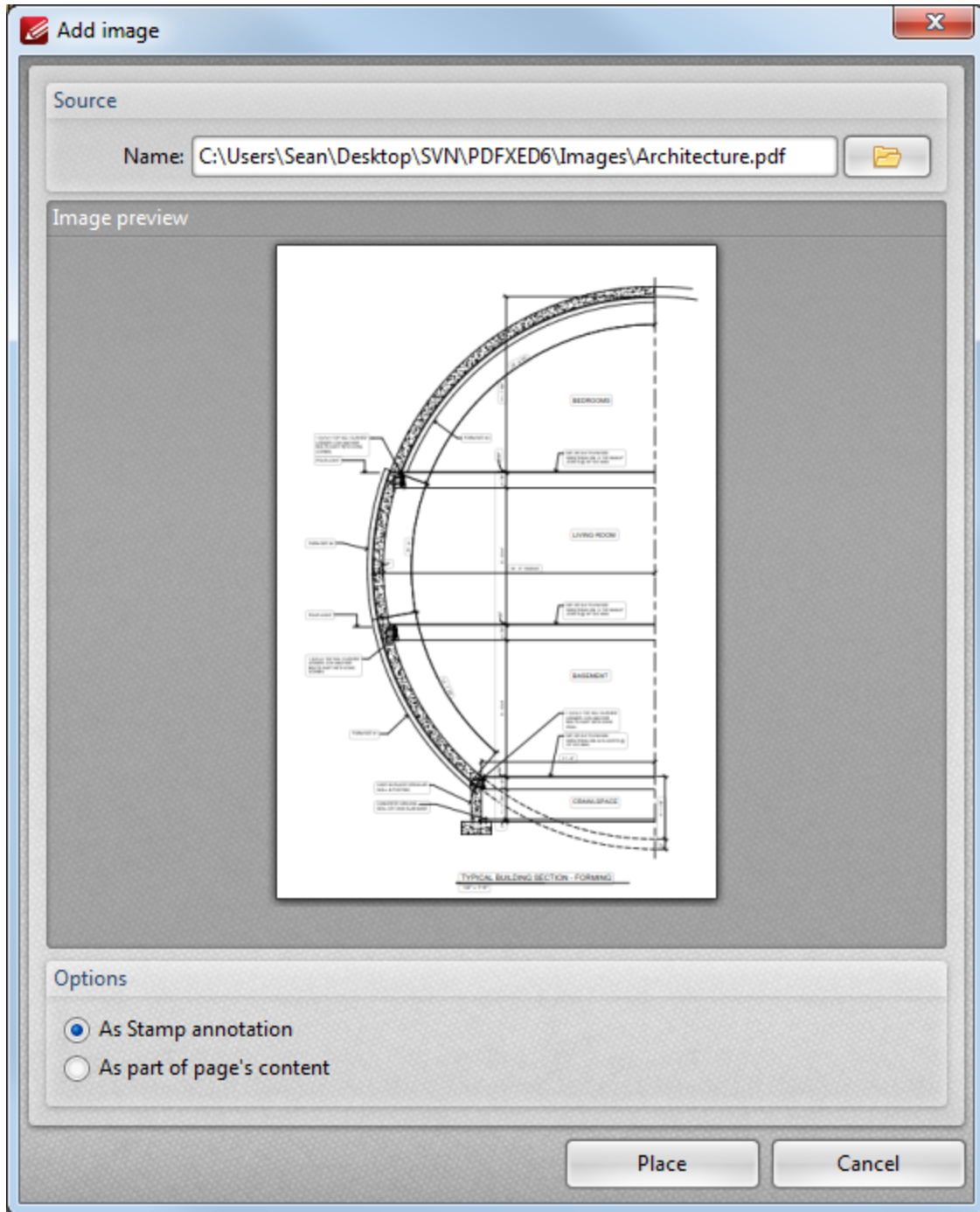
Figure 2. Add image Dialog Box

- Click the folder icon to select an alternative file.
- Select the manner in which the image is added to the document:
    - **As Stamp annotation** adds images as a stamp annotation, as detailed **here.** 704
    - **As part of page's content** adds images as base content. See **here** 807 for further information.
- Click **Place** to add images to the document.

6.4.7   **Insert Pages**

Insert Pages

Hover over **Insert Pages** to open the following submenu:
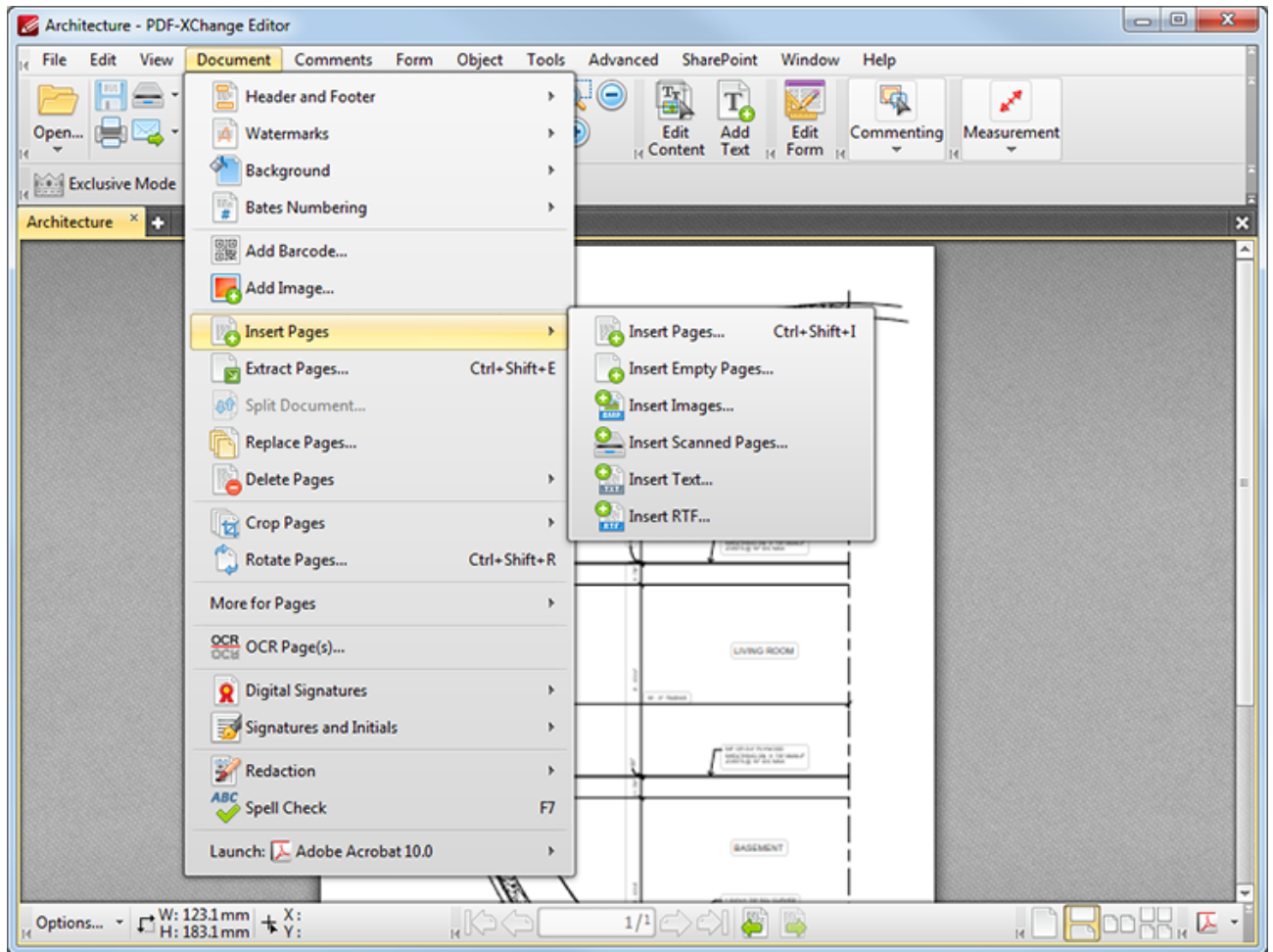
Figure 1. Document Tab Submenu. Insert Pages

Click **Insert Pages** to insert pages into the active document:
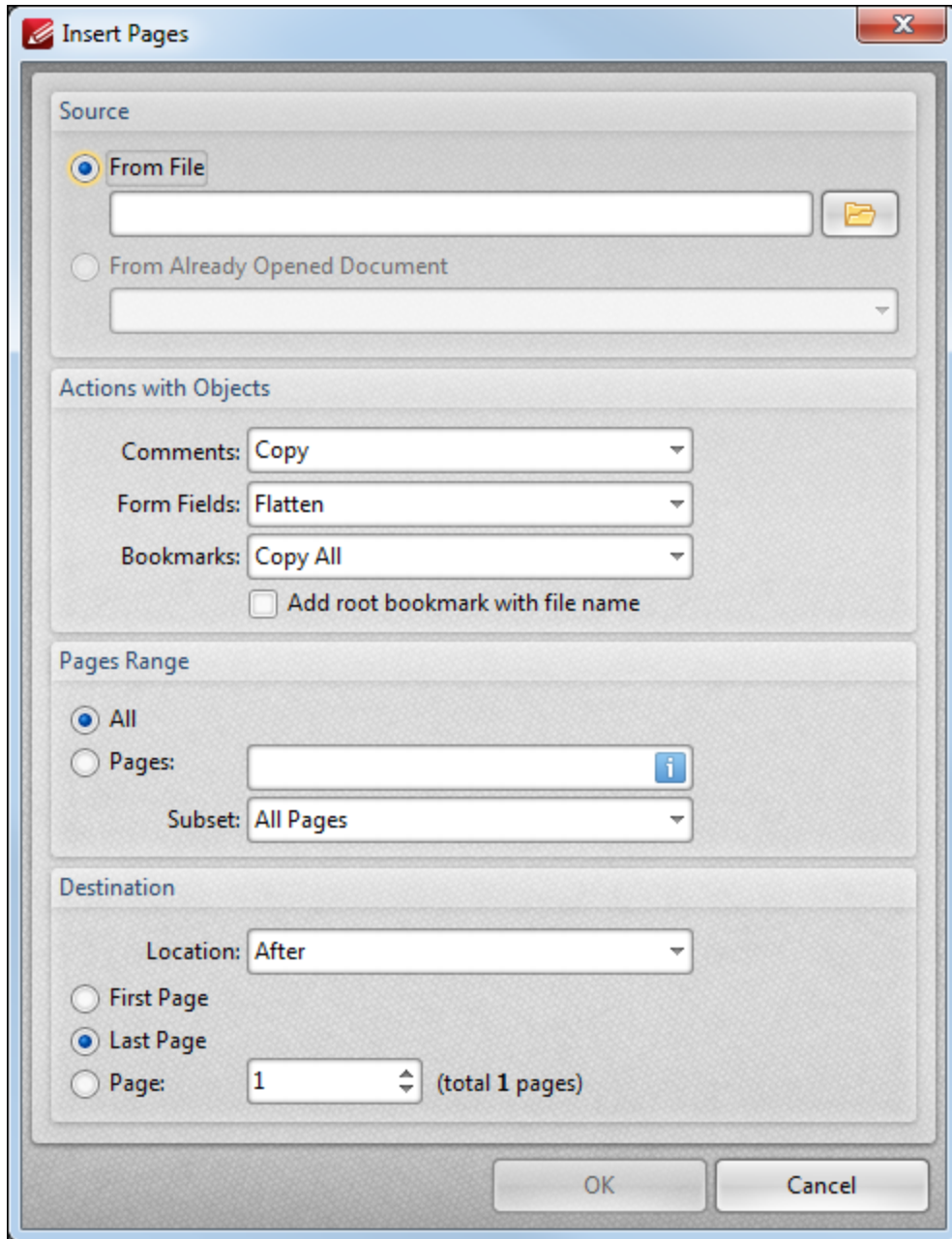
Figure 2. Insert Pages Dialog Box

- There are two options in the **Source** section. Select either **From File** or **From Already Opened Document** to determine the location from which the inserted pages will come.
- Use the menus in the **Actions with Objects** section to determine actions taken with **Comments, Form Fields** and **Bookmarks.** Select the **Add root bookmark with file name** box as desired.
- Use the **Pages Range** section to determine which pages are inserted. Select **All** to insert all pages. Alternatively, use the **Pages** number box to enter individual pages, separated with a comma, or page ranges, separated with a hyphen. See **here** 860 for further information.
- Use the **Destination** section to determine the location at which the new pages will be inserted.

- When the desired settings have been selected, click **OK** to insert pages.

Click **Insert Empty Pages** to insert empty pages into documents:
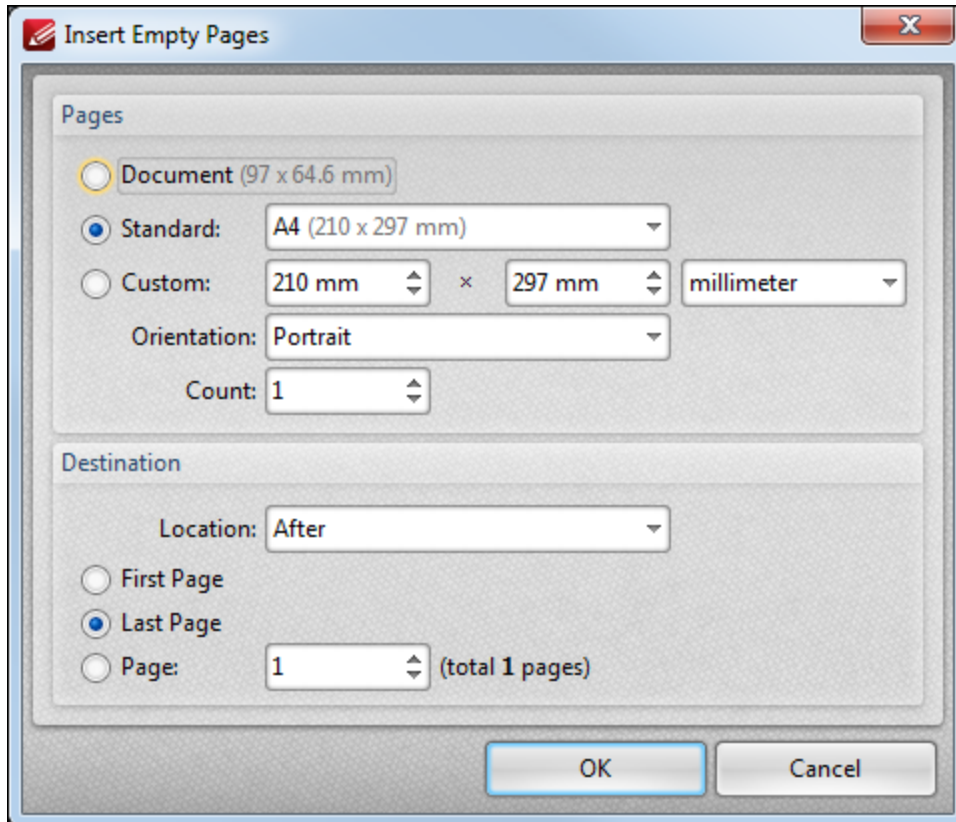
Figure 3. Insert Empty Pages Dialog Box

- Use the settings in the **Pages** section to determine the dimensions of the empty pages:
  - Select **Document** to match the dimensions of the document into which empty pages are being inserted.
  - Select **Standard** to select one of the standard document sizes, such as those used by the **ISO** and **ANSI.**
  - Select **Custom** to enter custom dimensions and enter the desired dimensions into the number boxes.
  - Use the measurements menu to select the units of measurement.
  - Select either **Portrait** or **Landscape** from the **Orientation** menu.
  - Use the **Count** menu to determine how many pages are inserted.
- Use the settings in the **Destination** section to determine the location at which the empty pages are inserted.
- Click **OK** to insert the empty pages.

Click **Insert Images** to insert images into documents:
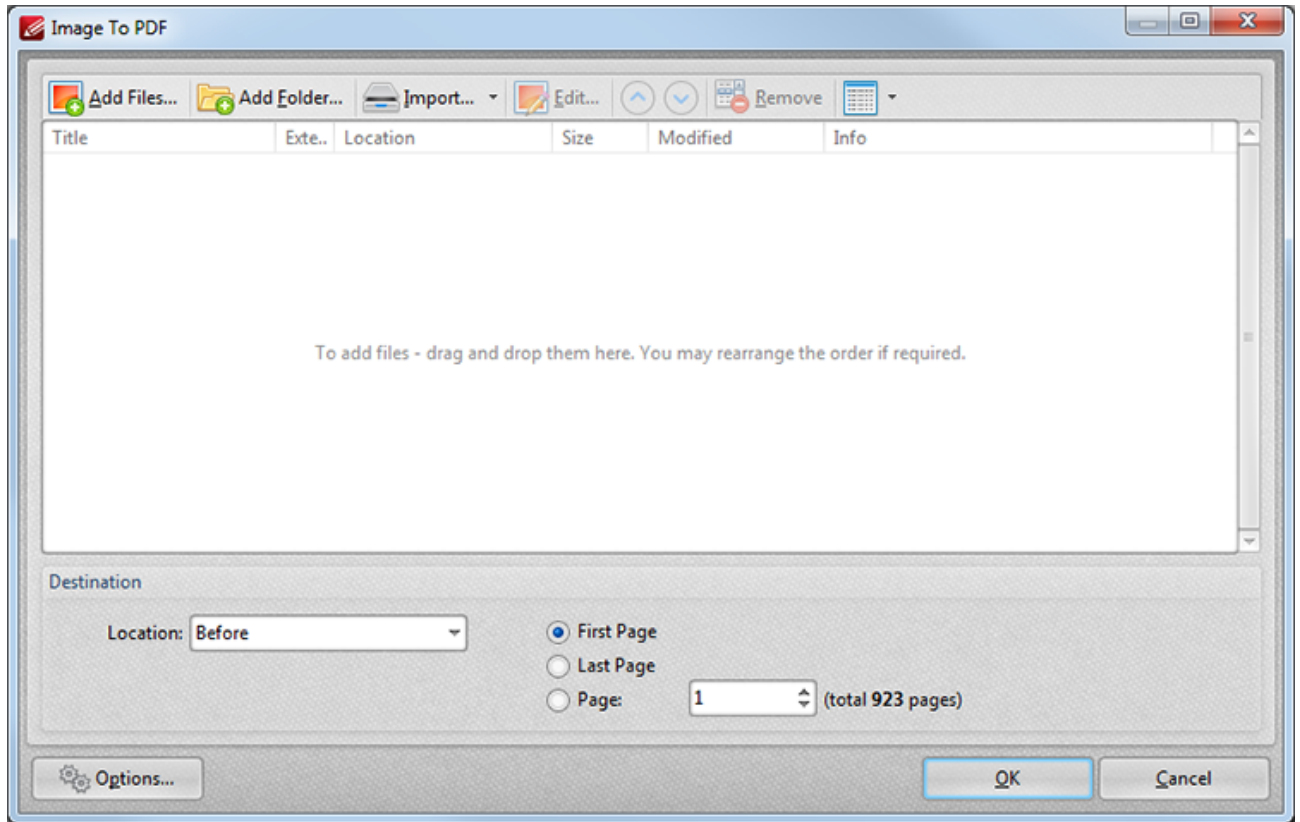
Figure 4. Images to PDF Dialog Box

- Click **Add Files** to add images from the local computer to the list of source files.
- Click **Add Folder** to add all images from a specific folder to the list of source files.
- Click **Import** to import images directly from the local scanner. See **here** ⌐186⌐ for further details.
- Click **Edit** to edit selected images before they are inserted.
- Use the arrows to reorder images in the list.
- Click **Remove** to remove images from the list.
- Click the **Change View Mode** icon to change the manner in which images are displayed in the list.
- Use **Destination** settings to determine the location at which the images are inserted.
- Click **Options** to determine the options for inserted images. See **here** ⌐178⌐ for further details.
- Click **OK** to insert images.

Click **Insert Scanned Pages** to insert scanned pages into documents:
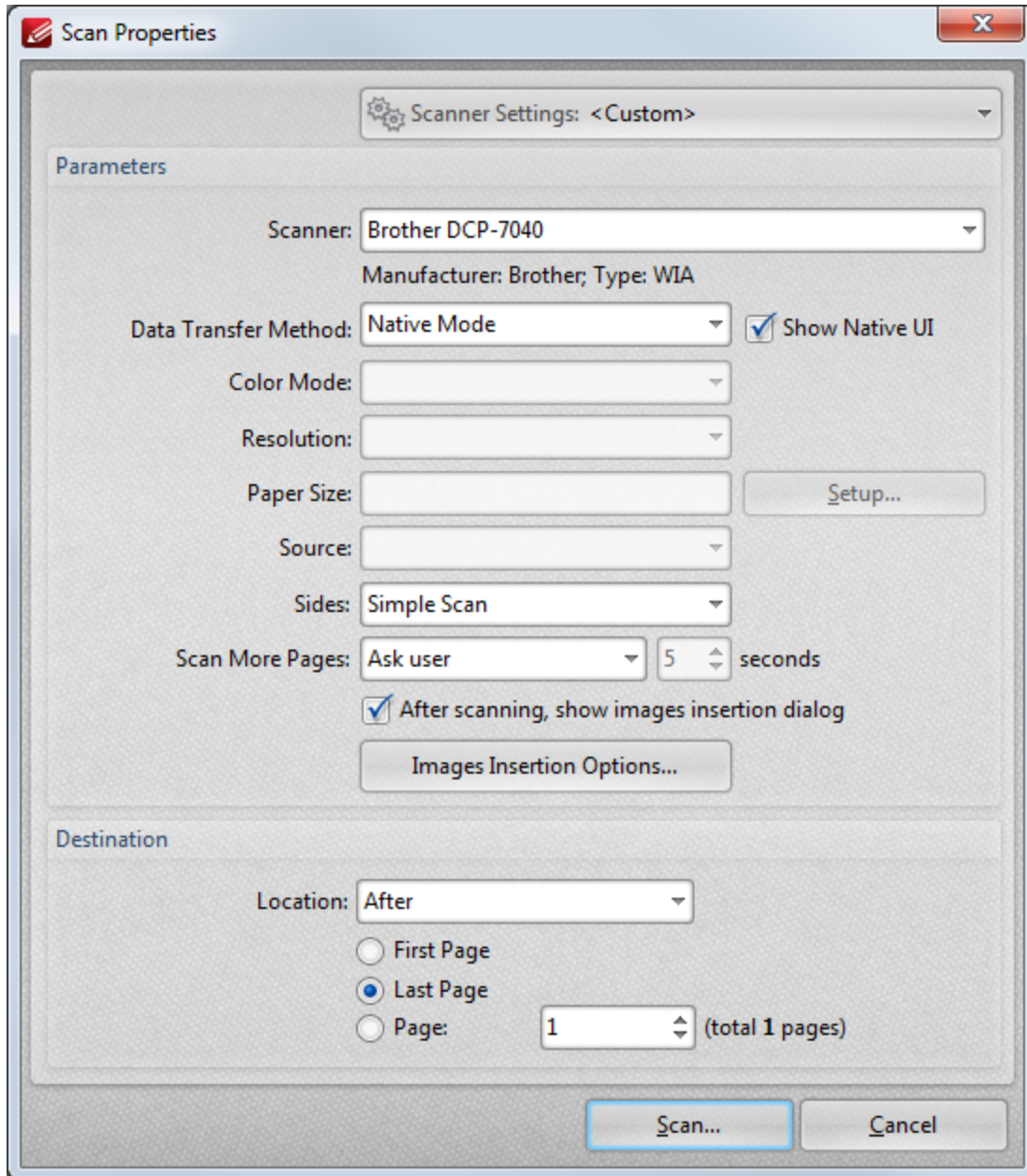
Figure 5. Scan Properties Dialog Box

- 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.** [178]
- Use the **Destination** options to determine where in the active document the scanned pages will be be inserted.

Click **Scan** to scan images.

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

Click **Insert Text** to insert text files into the active document:
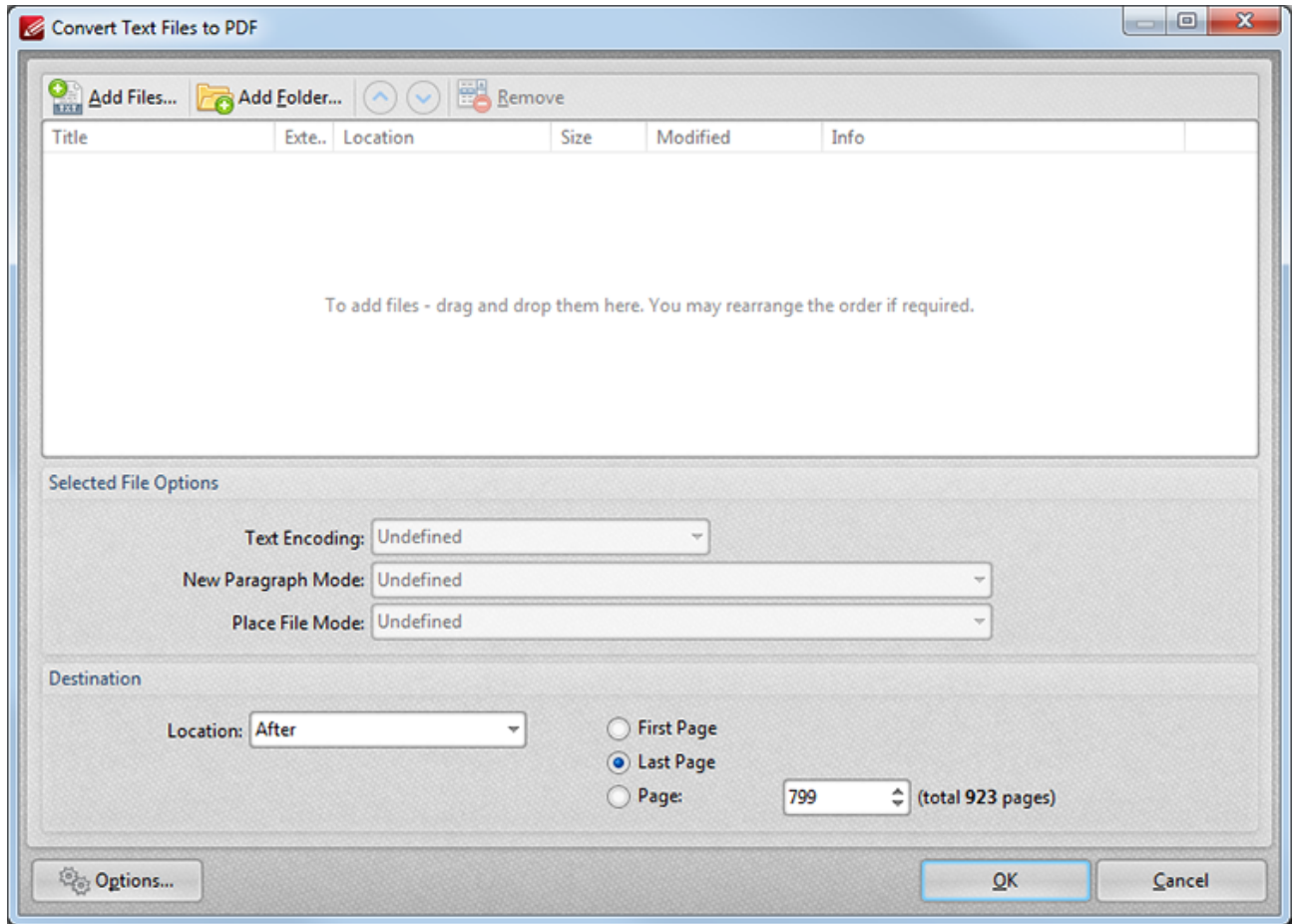
Figure 6. Convert Text Files to PDF Dialog Box

- Click **Add Files** to add text files from the local computer to the list of source files.
- Click **Add Folder** to add all text files from a specific folder to the list of source files.
- Use the arrows to reorder text files in the list.
- Click **Remove** to remove text files from the list.
- Select a file from the list of source files to enable the **Selected File Options:**
    - **Text Encoding** determines the language of the text in the file.
    - **New Paragraph Mode** determines the manner in which **PDF-XChange Editor** defines paragraphs in the inserted text. The options are as follows:
        - **Each newline character starts a new paragraph.** (A newline is a special character in computing that signifies the end of a line of text).
        - **Two newline character starts a new paragraph, singles ignored.**
        - **Double newline character starts a new paragraph, singles is converted into space.**
    - **Place File Mode** determines the manner in which files are placed:
        - **Start each file from new paragraph** places each file in a new paragraph on the same page.
        - **Start each file from new page** places each file in a new page.

- Use the settings in the **Destination** section to determine the location at which the text files are inserted into the active document.
- Click **Options** to determine the options for inserted text tiles. See **here** 170 for further information.
- Click **OK** to insert the text files.

Click **Insert RTF** to insert RTF files into documents:
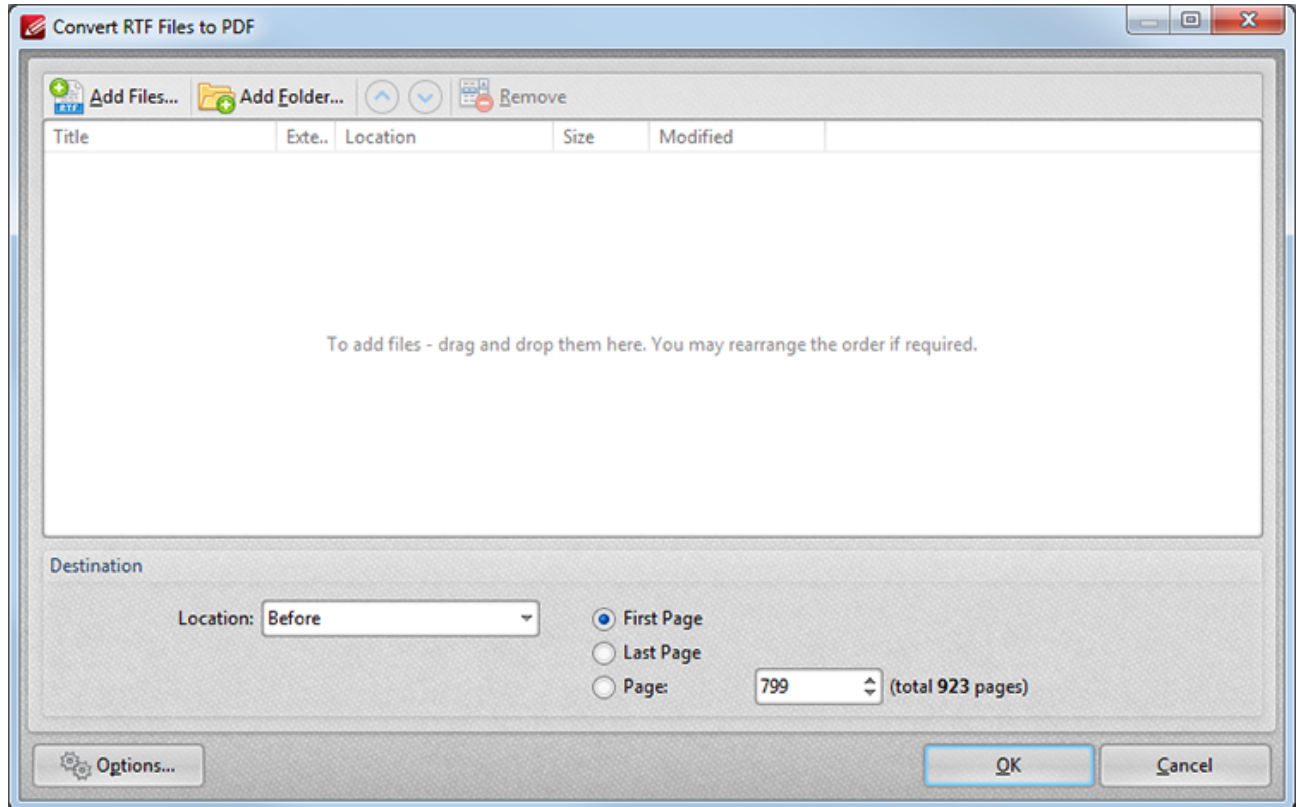
Figure 7. Convert RTF Files to PDF Dialog Box

- Click **Add Files** to add RTF files from the local computer to the list of source files.
- Click **Add Folder** to add all RTF files from a specific folder to the list of source files.
- Use the arrows to reorder text files in the list.
- Click **Remove** to remove text files from the list.
- Use the settings in the **Destination** section to determine the location at which files are inserted.
- Click **Options** to determine the relative path options for inserted files.
- Click **OK** to insert the RTF files.

6.4.8 **Extract Pages**

Extract Pages

Click **Extract Pages** to extract document pages:
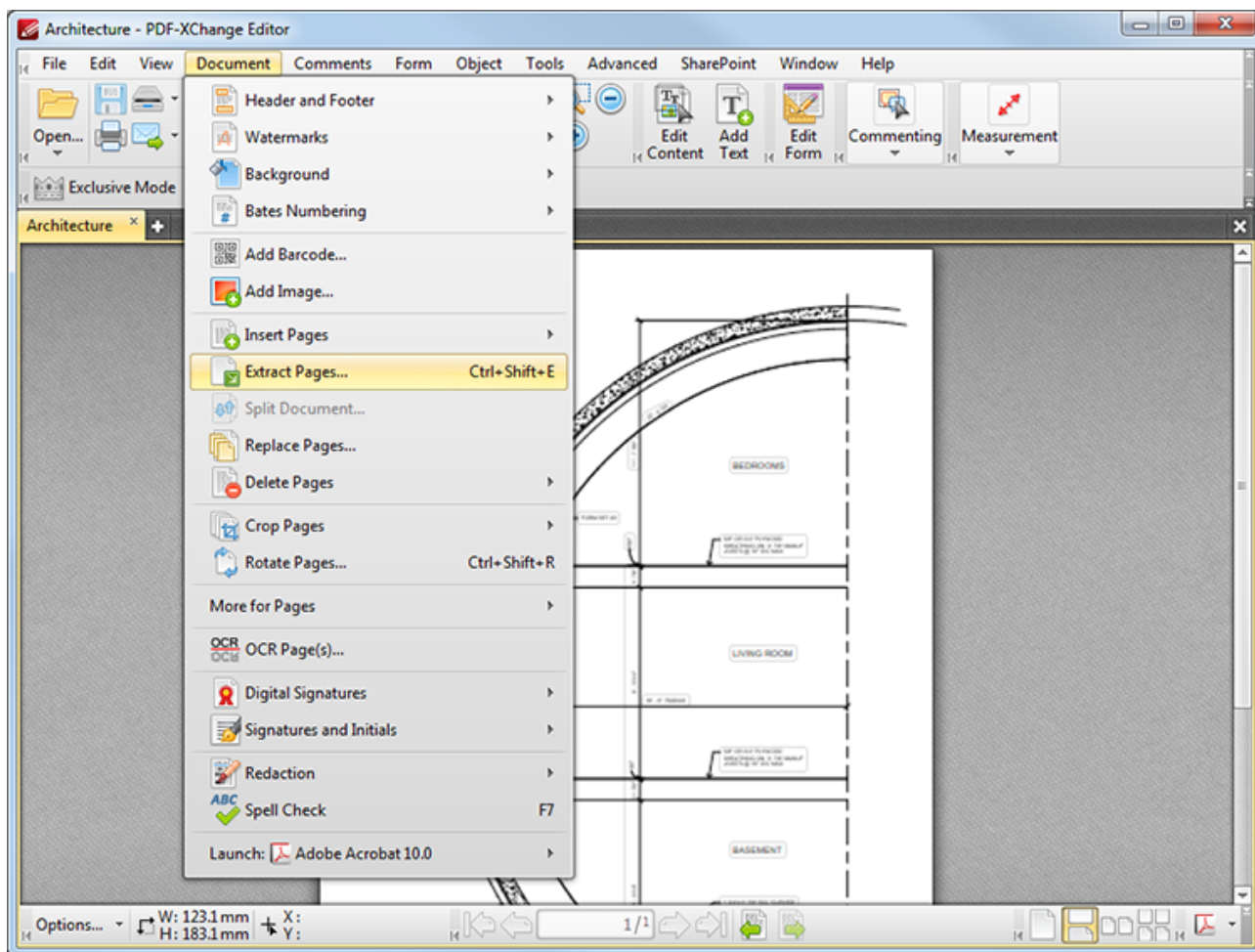
Figure 1. Document Tab Submenu. Extract Pages
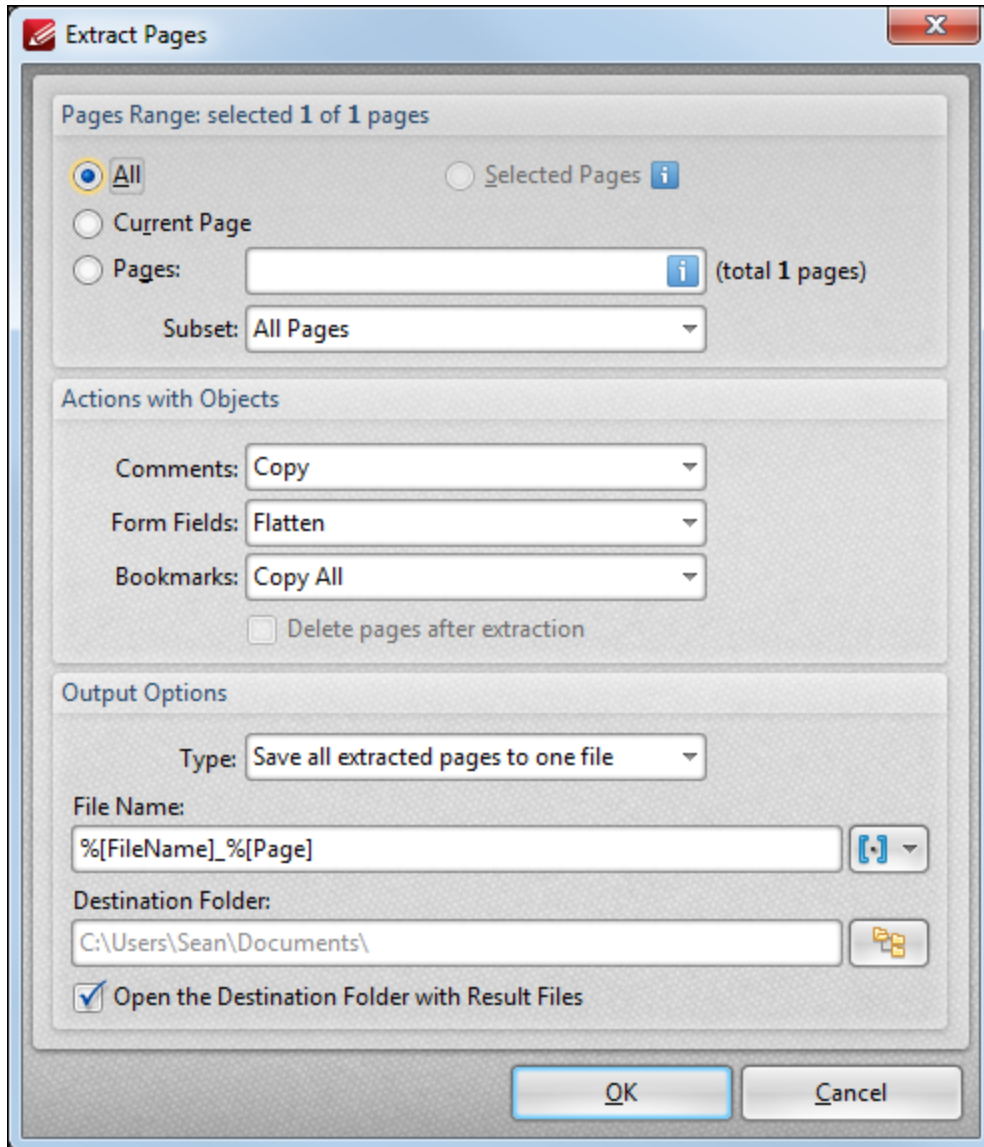
Figure 2. Extract Pages Dialog Box

- Use the **Pages Range** options to determine extracted pages.
- Use the **Pages** option button to select individual pages, which must be separated with a comma, or page ranges, which must be separated with a hyphen. See **here**[860] for further information.
- Use the **Subset** menu to select a subset of pages.
- Use the **Actions with Objects** options to determine the settings for objects within the extracted pages.
- Select the **Delete pages after extraction** box as desired.
- Use the **Output Options** to determine the manner in which extracted pages are saved.
- Use the **Type** menu to determine the grouping of extracted pages when they are saved.
- Use the **File Name** text box to enter a file name for extracted pages. Click the icon to include **macros.**[830]

- Use the **Destination Folder** text box to enter the name of the desired destination folder, or click the icon to select a file from the local computer.
- Select the **Open the Destination Folder with Result Files** box to open the destination folder when the operation is complete.
- Click **OK** to extract pages.

The keyboard shortcut for this feature is Ctrl+Shift+E.

6.4.9 **Split Document**

Split Document

The **Split Document** feature is useful for organizing documents that are divided into chapters, such as books. Click **Split Document** to divide documents:
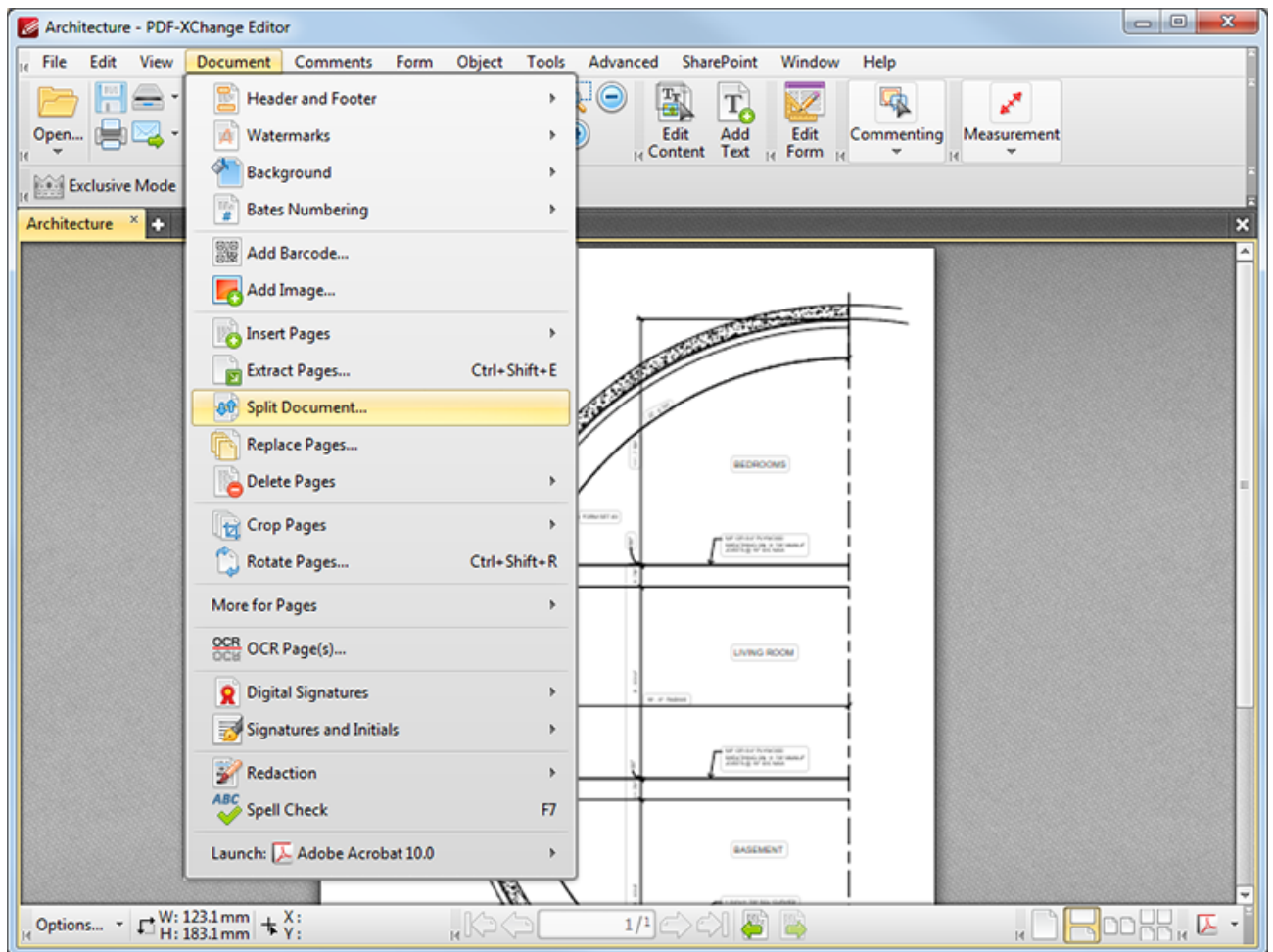
Figure 1. Document Tab Submenu. Split Document

Documents can be split by top-level bookmarks or page numbers. When this option is selected the following dialog box will open:
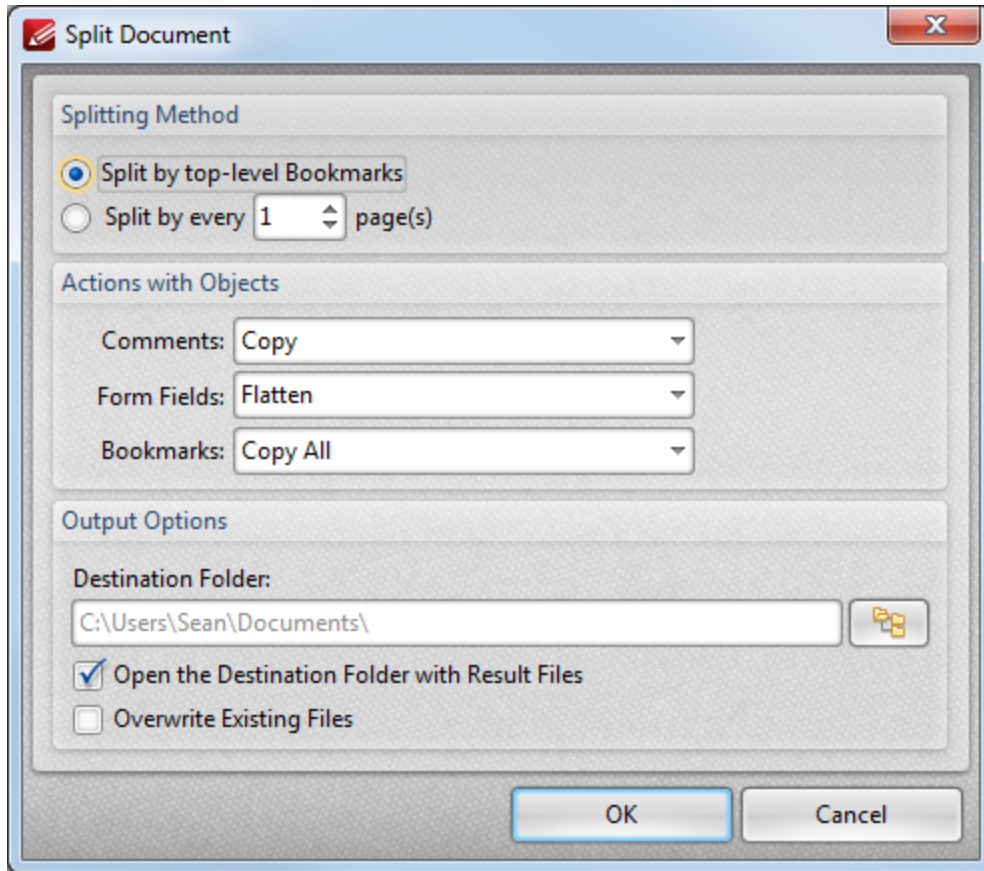
Figure 2. Split Document By Bookmarks Dialog Box

- Use the **Splitting Method** options to determine the manner in which the document is split:
  - Select **Split by top-level Bookmarks** to split the document according to its top-level bookmarks.
  - Select **Split by every *n* page(s)** to split the document every *n* pages.
- Use the **Actions with Objects** options to determine the settings for objects in the new document.
- Use the **Output Options** to determine the manner in which extracted pages are saved:
  - Use the **Destination Folder** to enter the name of the desired destination folder, or click the icon to select a file from the local computer.
  - Select the **Open the Destination Folder with Result Files** to open the destination folder when the process is complete.
  - Select the **Overwrite Existing Files** box as desired. This means that files saved in folders that feature files of the same name will overwrite the existing files. It is a useful feature when documents need to be split multiple times.
- Click **OK** to split documents.

6.4.10 **Replace Pages**

Replace Pages

Click **Replace Pages** to replace document pages with pages from other documents:
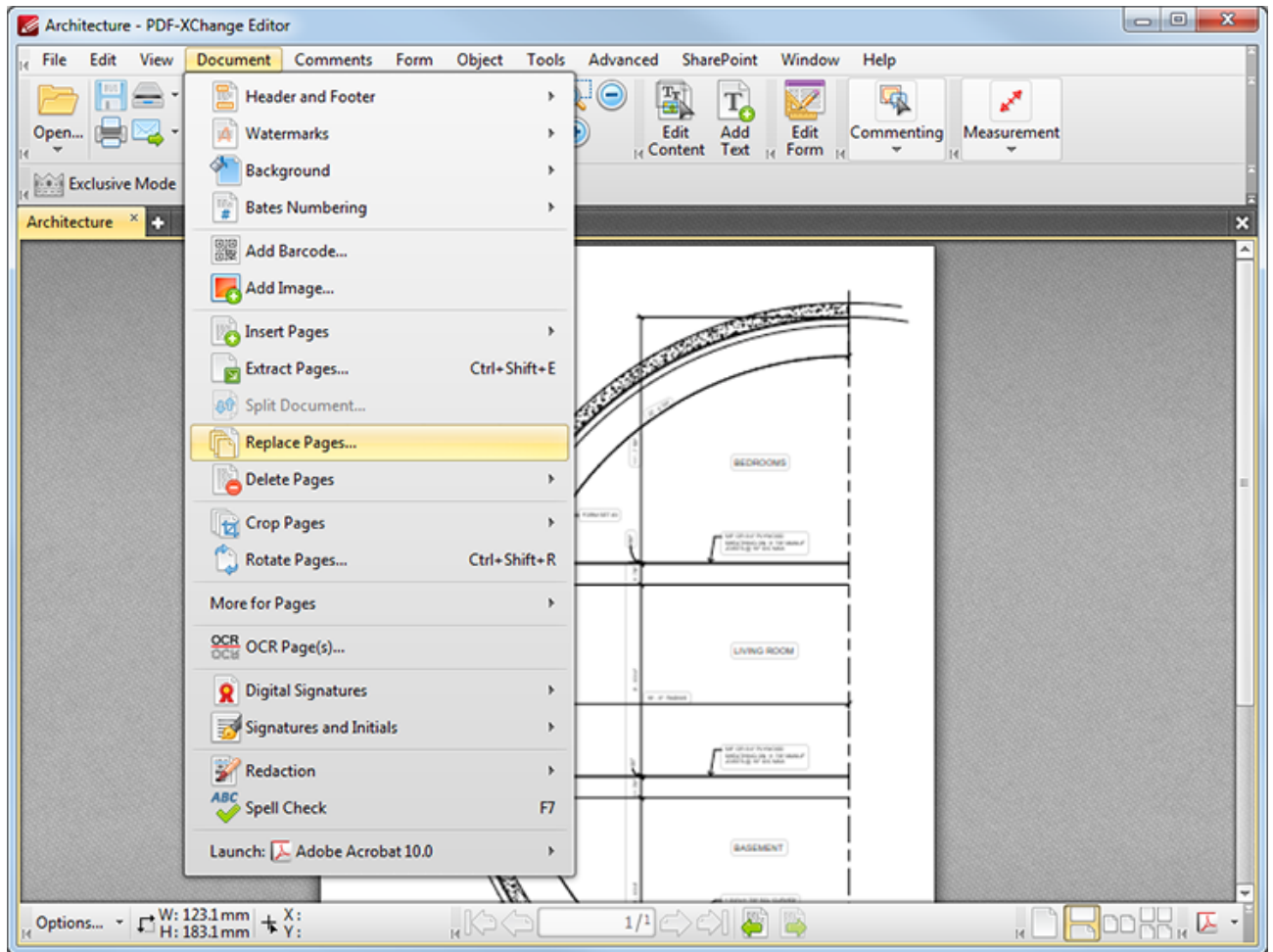
Figure 1. Document Tab Submenu. Replace Pages

The following dialog box will open:
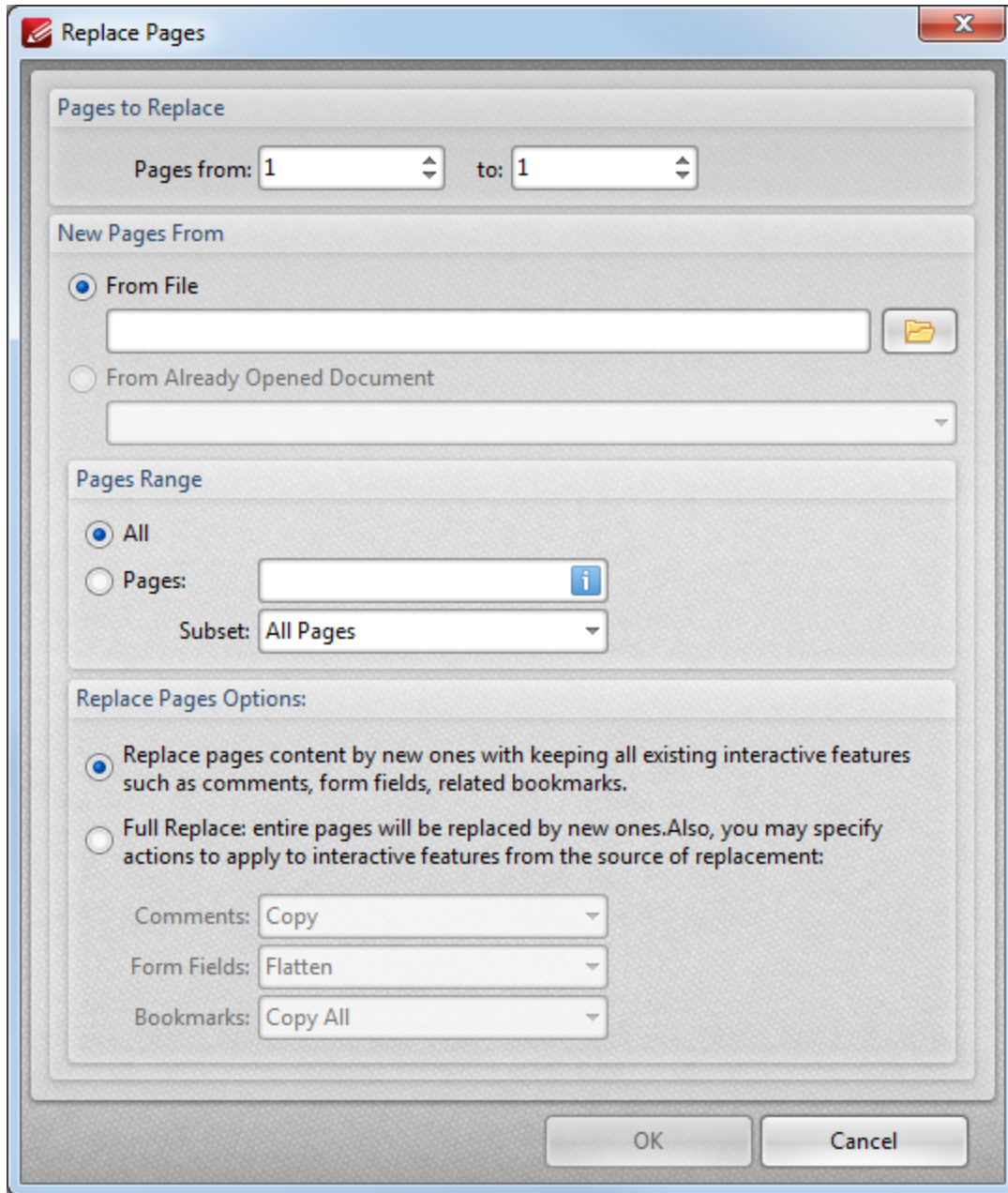
Figure 2. Replace Pages Dialog Box

- Use the number boxes in the **Pages to Replace** section to determine the pages that will be replaced.
- Use either of the options in the **New Pages From** section to determine the location from which the new pages will be sourced.
- Use the **Pages Range** section to determine the pages of the selected document that will replace the pages selected in the **Pages to Replace** section. Use the **Pages** text box to select individual pages, separated with a comma, or page ranges, separated with a hyphen. See **here** 860 for further information.
- Use the **Replace Pages Options** to determine the parameters of the new pages.

- Click **OK** to replace pages.

6.4.11 **Delete Pages**

Delete Pages

These options are used to delete pages from the active document. Hover over **Delete Pages** to open the following submenu:
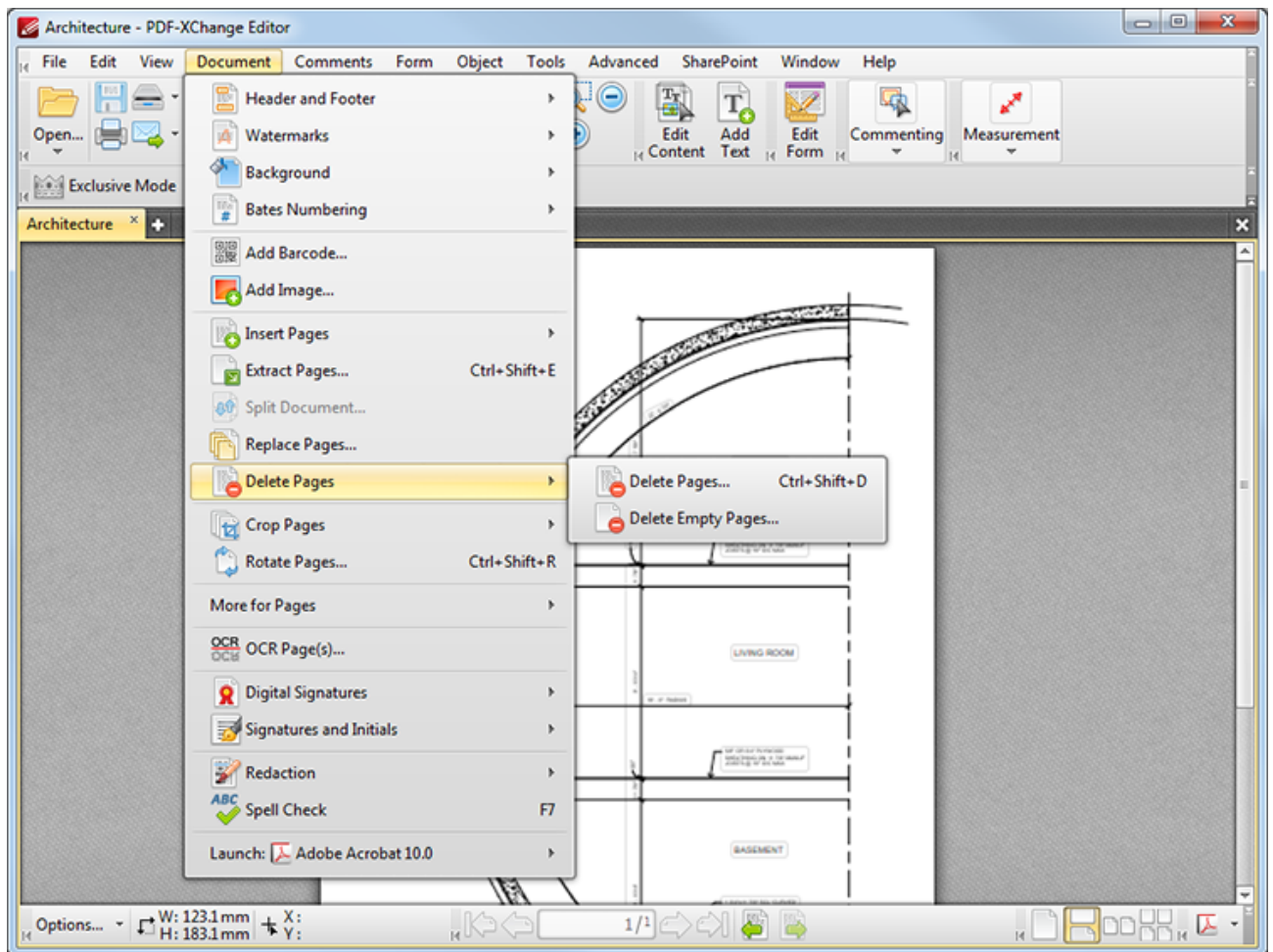
Figure 1. Delete Pages Submenu

Click **Delete Pages** to delete pages from the active document. The following dialog box will open:
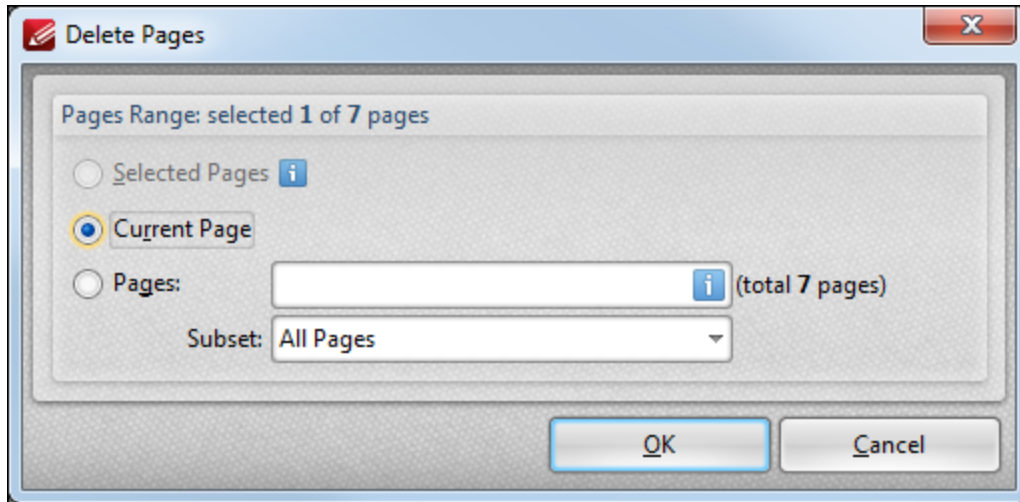
Figure 2. Delete Pages Dialog Box

- Use **Selected Pages** to delete the pages currently selected in thumbnails view.
- Use **Current Page** to delete the current page.
- Use the **Pages** number box to select specific pages or page ranges. See **here**⬛860 for further information.
- Use the **Subset** menu to select a subset of pages.
- When the desired settings have been entered, click **OK** to delete the selected pages.

Click **Delete Empty Pages** to delete empty pages from the active document. The following dialog box will open:
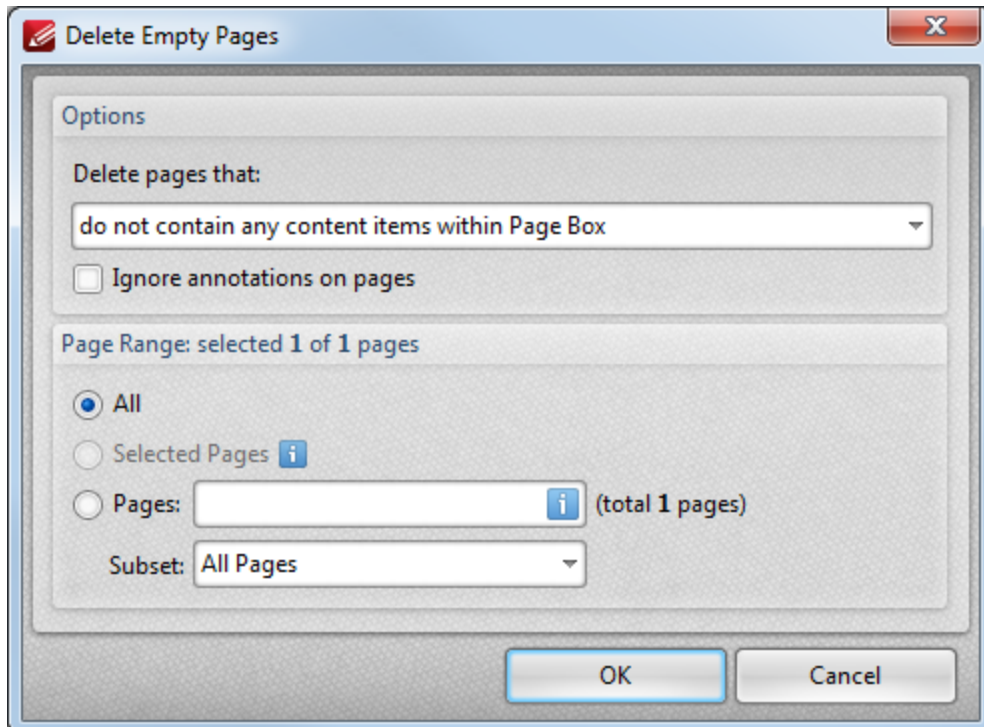
Figure 3. Delete Empty Pages Dialog Box

- Use the **Delete pages that** menu to determine the type of pages that will be deleted.
- Select the **Ignore annotations on pages** dialog box as desired.
- The options in the **Pages Range** section determine which pages will be included when **PDF-XChange Editor** scans the document for empty pages. The options are as follows:
  - Select **All** to include all pages.
  - Select **Selected Pages** to include only the pages currently selected in the **Thumbnails** 497 pane.
  - Use the **Pages** box to determine specific pages. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
  - When the desired parameters have been selected, click **OK** to delete pages.

6.4.12 Crop Pages

Crop Pages

These options are used to crop documents. Hover over **Crop Pages** to open the following submenu:
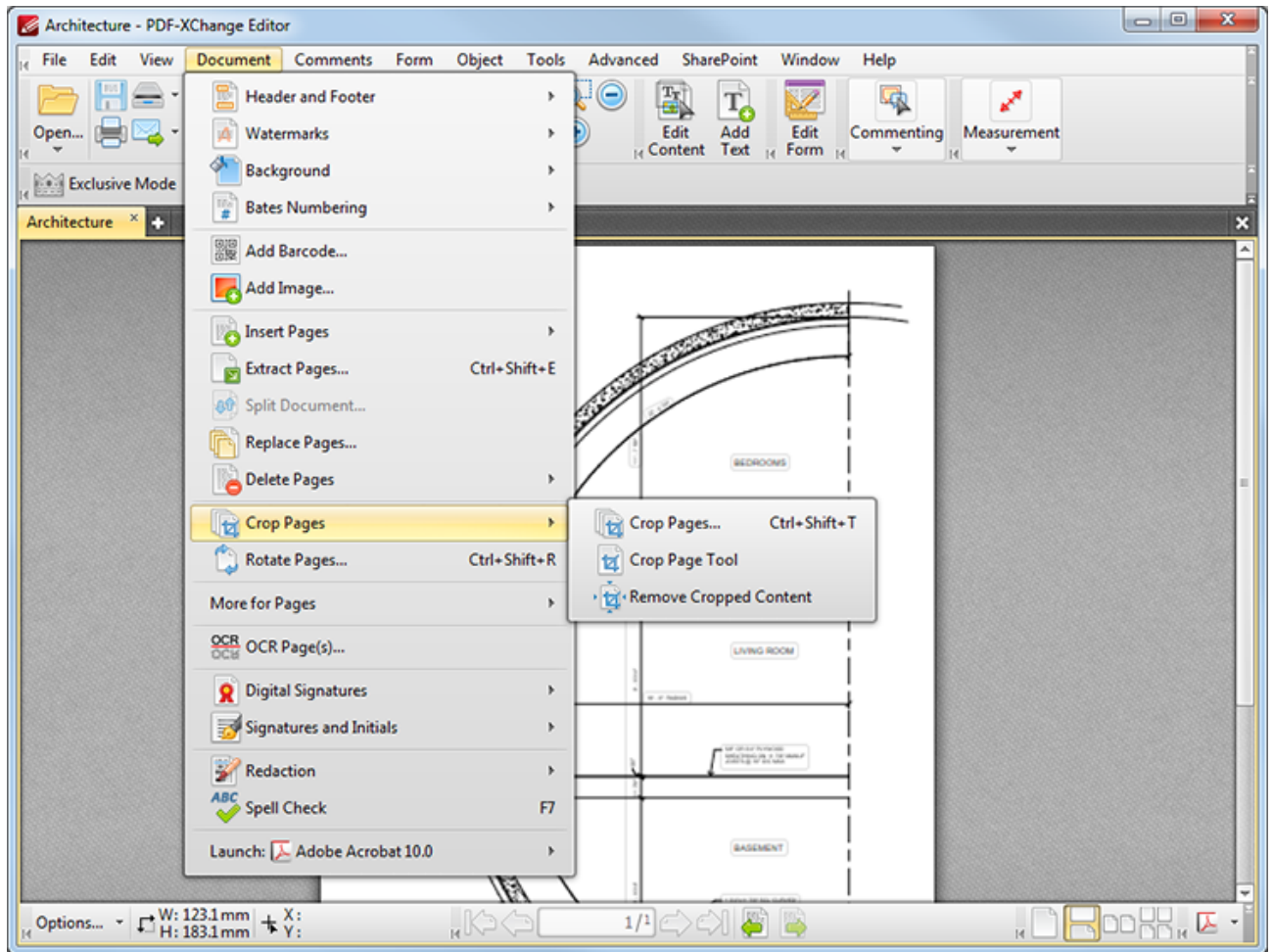
Figure 1. Document Tab Submenu. Crop Pages

Click **Crop Pages** to crop document pages. The following dialog box will open:
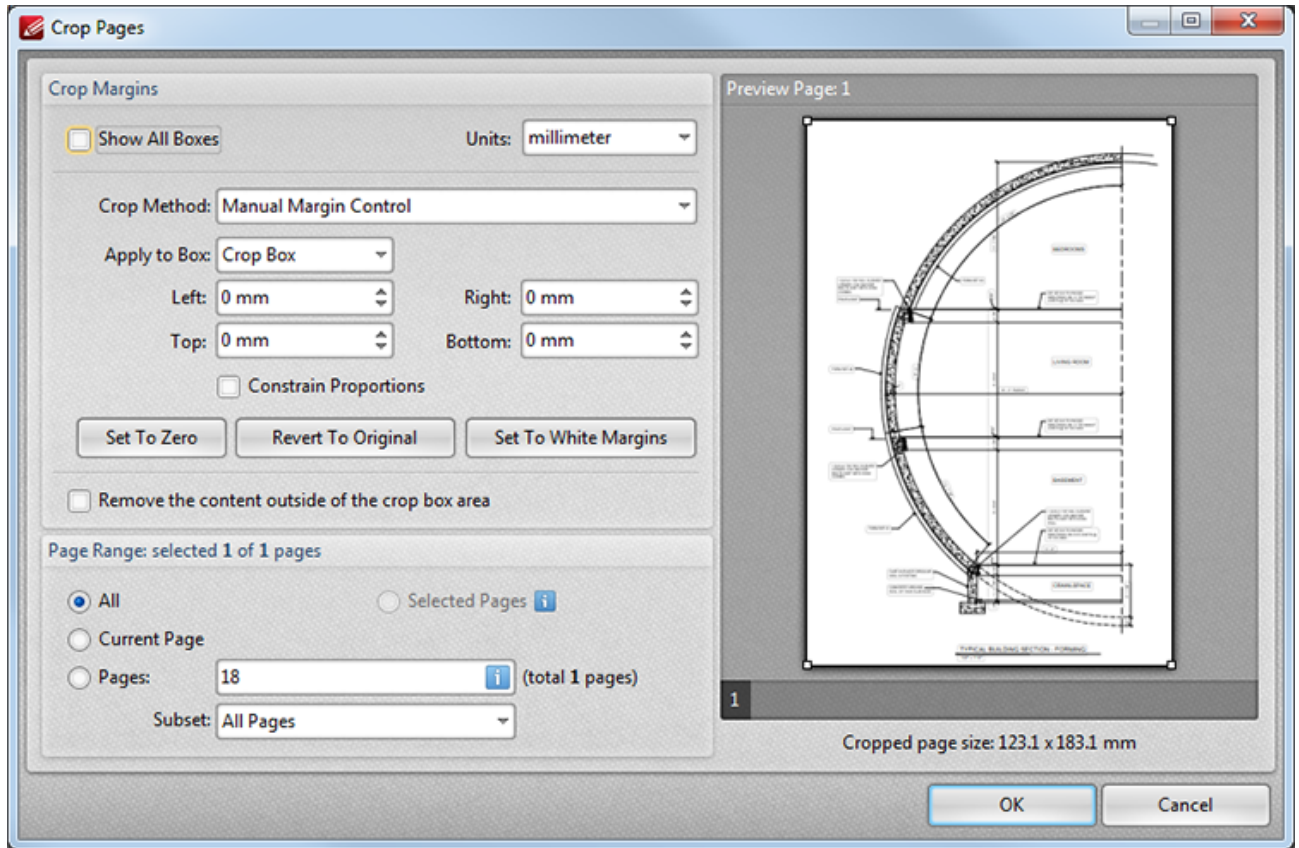
Figure 2. Crop Pages Dialog Box

PDF documents feature up to five boxes that determine their content and appearance. They are the **Media Box, Crop Box, Bleed Box, Trim Box** and **Art Box**. **PDF-XChange Editor** uses four of these boxes to determine customizable settings. See **here** 805 for further information.

- Use the **Crop Margins** settings to determine the cropping parameters.
- Select the **Show All Boxes** box to view/edit all boxes in the preview pane.
- Use the **Crop Method** menu to select the cropping method. There are four options. Three of these: **Remove All White Spaces, Remove Vertical White Spaces** and **Remove Horizontal White Spaces** have predefined and self-explanatory settings that cannot be changed. The fourth option, **Manual Control of Margins**, allows the user to define boxes and margins.
- Use the **Apply to Box** menu to select and edit box margins.
- Enter the desired measurements for the **Left, Right, Top** and **Bottom** margins of the selected box.
- Select the **Constrain Proportions** box to maintain the ratio of margins. For example if the margin in the **Left** box is changed to 5mm then the margins in the **Right, Top** and **Bottom** boxes will also be changed to 5mm.
- Use **Set to Zero, Revert to Original** and **Set To White Margins** to apply these functions to boxes selected in the **Apply to Box** menu.

- Select the **Remove the content outside of the crop box area** box to remove content outside the crop box. Any information cropped away by the crop box will not be removed from the file's underlying code unless this option is selected.
- The **Pages Range** settings are as follows:.
  - Select **All** to crop all the pages of the document.
  - Select **Current Page** to crop only the current page.
  - Use the **Pages** box to determine specific pages of the document to be cropped. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been selected click **OK** to crop pages.

Click **Crop Page Tool** to crop documents. The **Crop Tool** dialog box will open:
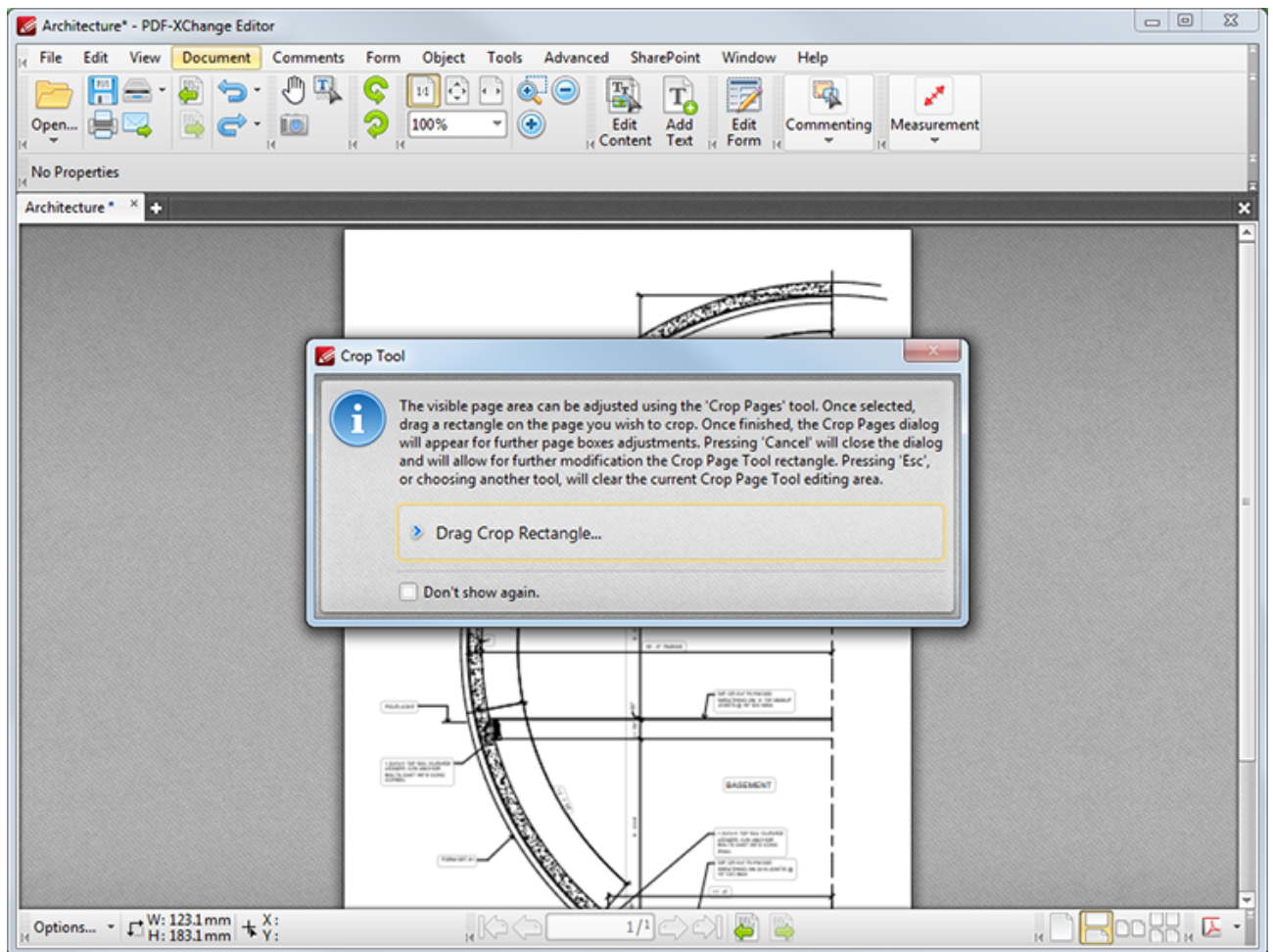
Figure 3. Crop Page Tool, Crop Tool Dialog Box

- 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 desired and then click **OK** to crop documents.

Click **Remove Cropped Content** to remove cropped content from documents.

6.4.13   Rotate Pages

Rotate Pages

Click **Rotate Pages** (or press Ctrl+Shift+R) to rotate document pages:
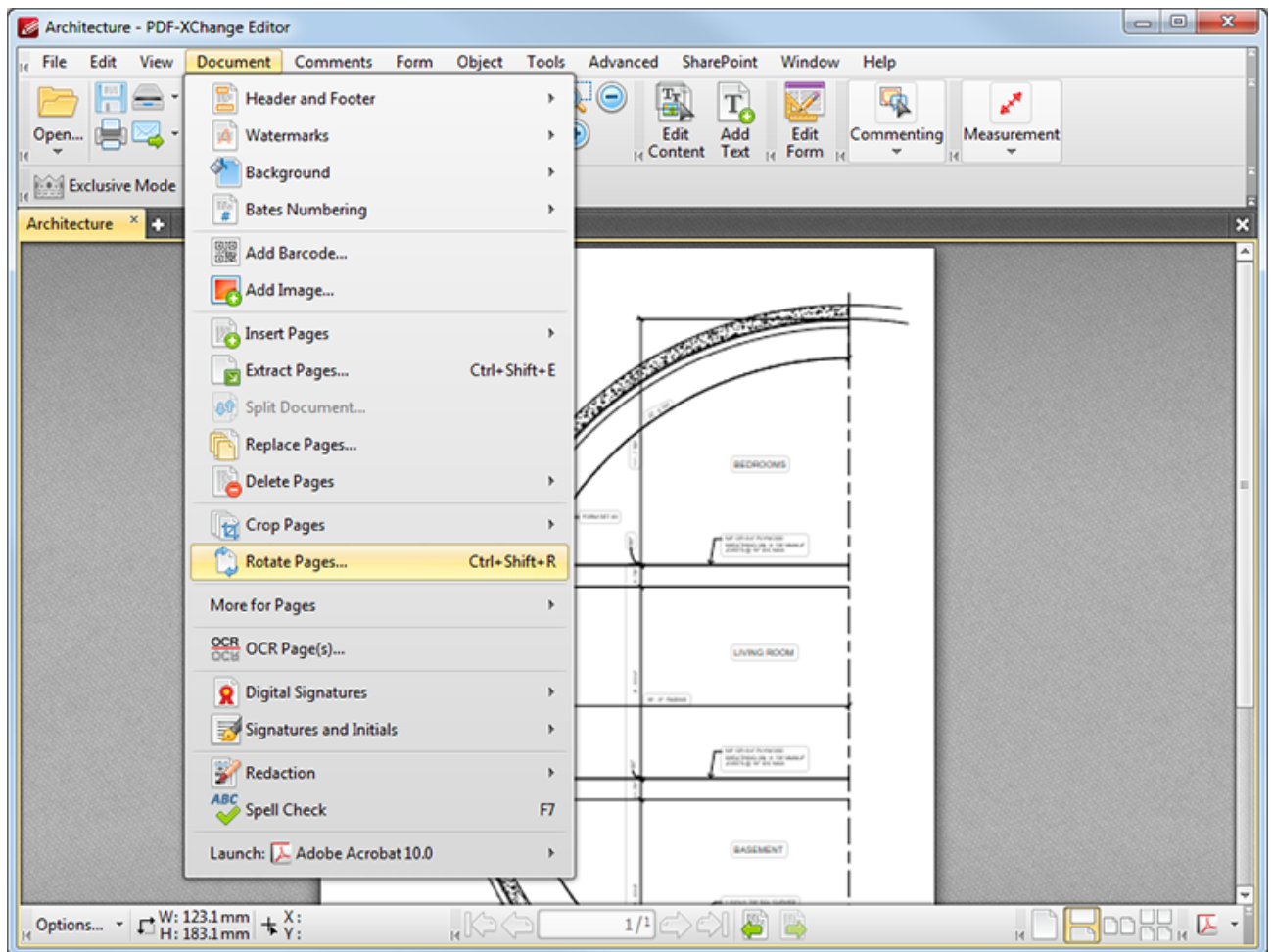
Figure 1. Document Tab Submenu. Rotate Pages

The following dialog box will open:
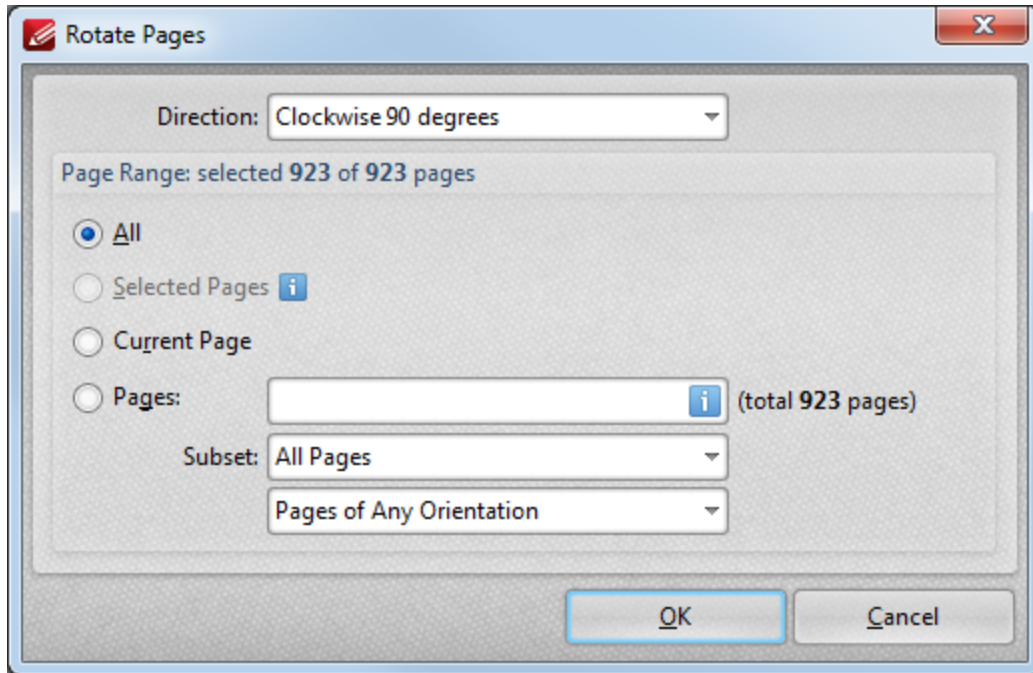
Figure 2. Rotate Pages Options

- Use the **Direction** menu to determine the direction and degree of rotation.
- The **Pages Range** options are as follows:
  - Select **All** to rotate all the pages of the document.
  - Select **Selected Pages** to rotate the pages currently selected in thumbnails view.
  - Select **Current Page** to rotate only the current page.
  - Use the **Pages** box to determine specific pages of the document to be resized. See <u>here</u>| 860| for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been selected, click **OK** to rotate pages.

6.4.14   **More for Pages**

 More for Pages

Hover over **More for Pages** to open the following submenu:
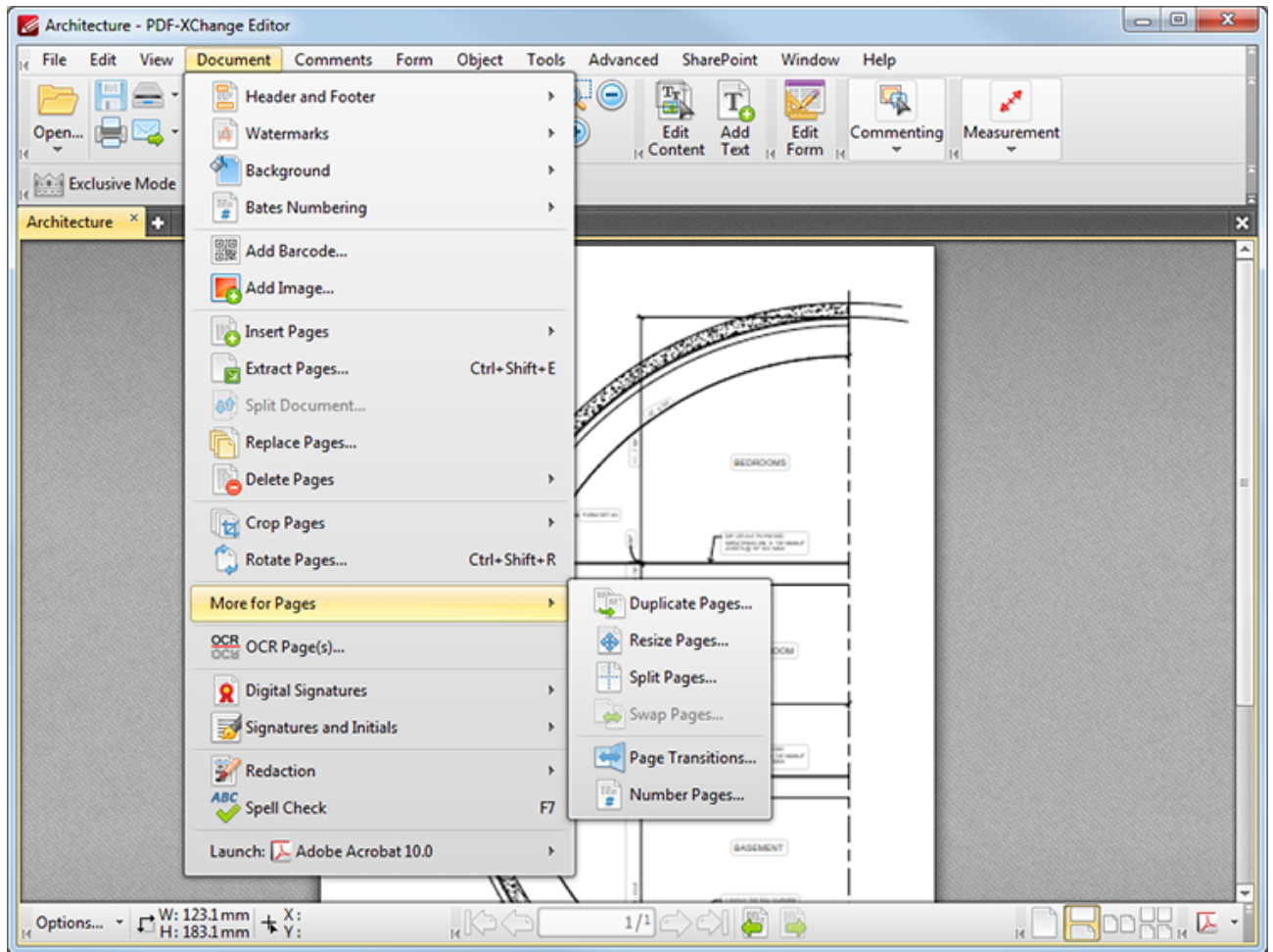
Figure 1. Document Tab Submenu. More for Pages

- Click **Duplicate Pages** to duplicate selected pages. See **(figure 2).**
- Click **Resize Pages** to resize selected pages. See **here** [582] for further information.
- Click **Split Pages** to split selected pages. See **here** [591] for further information.

- 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 **Page Transitions** to determine how **PDF-XChange Editor** moves between pages in **Full Screen Mode.**
- Click **Number Pages** to view the **Number Pages** options, which are explained **here.** 585
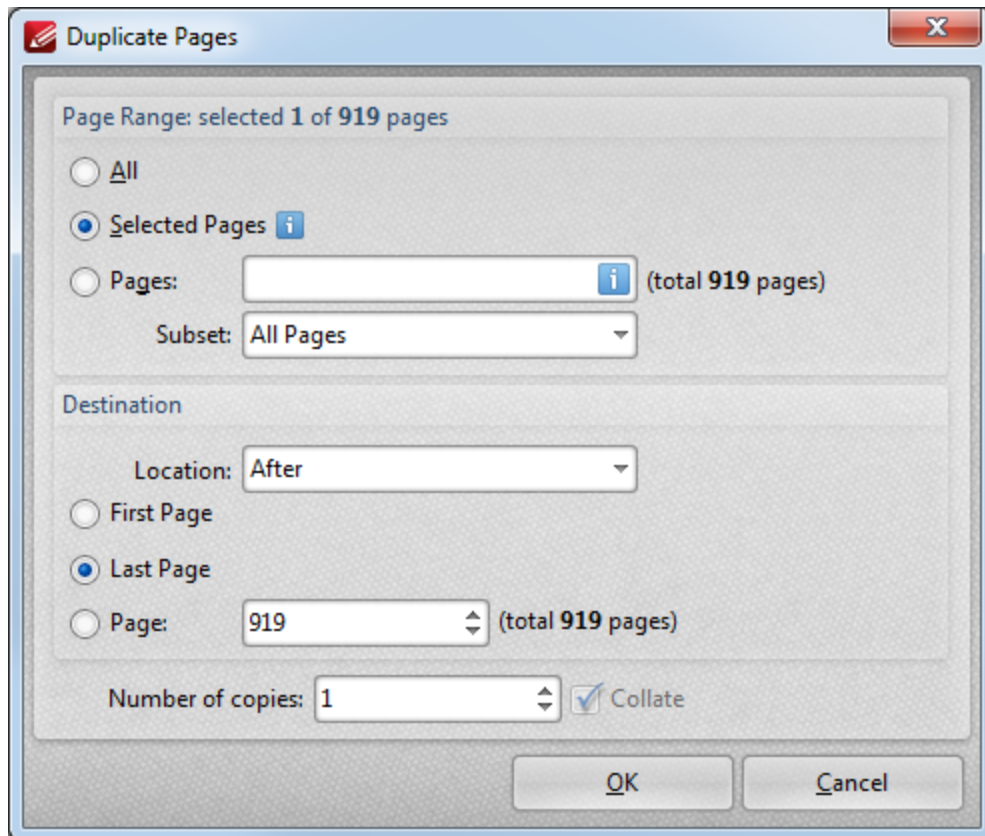
Figure 2. Duplicate Pages Dialog Box

These settings are used to duplicate selected pages.

- Use the **Page Range** settings to determine duplicated pages. See **here** 860 for page range settings.
- Use the **Destination** settings to determine the location at which duplicated pages are inserted:
  - Select either **After** or **Before** from the **Location** dropdown menu.
  - Use the option buttons to select **First Page, Last Page** or select **Page** option and specify a page in the number box.
  - Use the **Number of copies** text box to determine the number of duplicates created and select the **Collate** box as desired.

Click **OK** to duplicate pages.

6.4.14.1 Resize Pages

Resize Pages

Click **Resize Pages** to resize document pages:
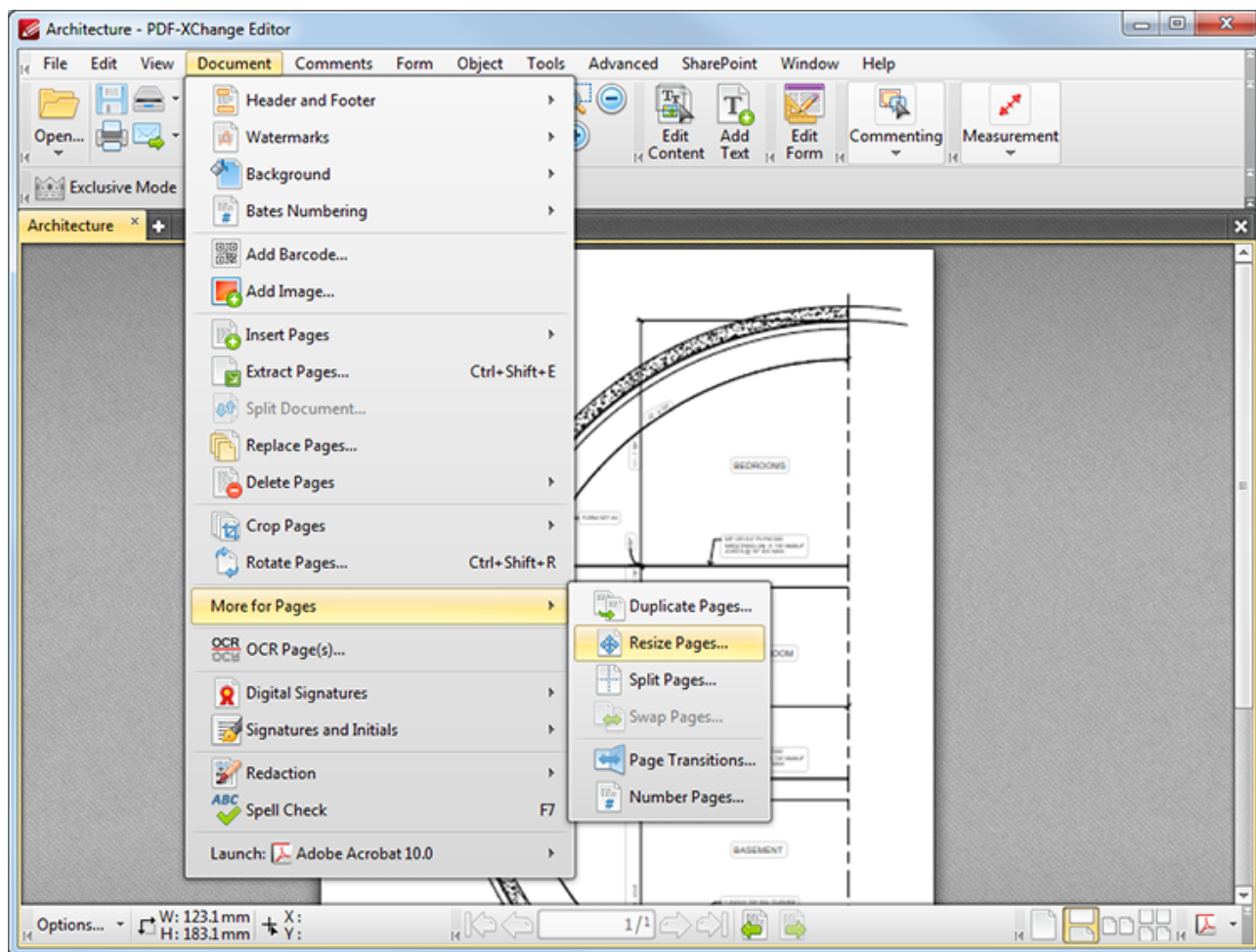
Figure 1. Document Tab Submenu. Resize Pages

The following dialog box will open:
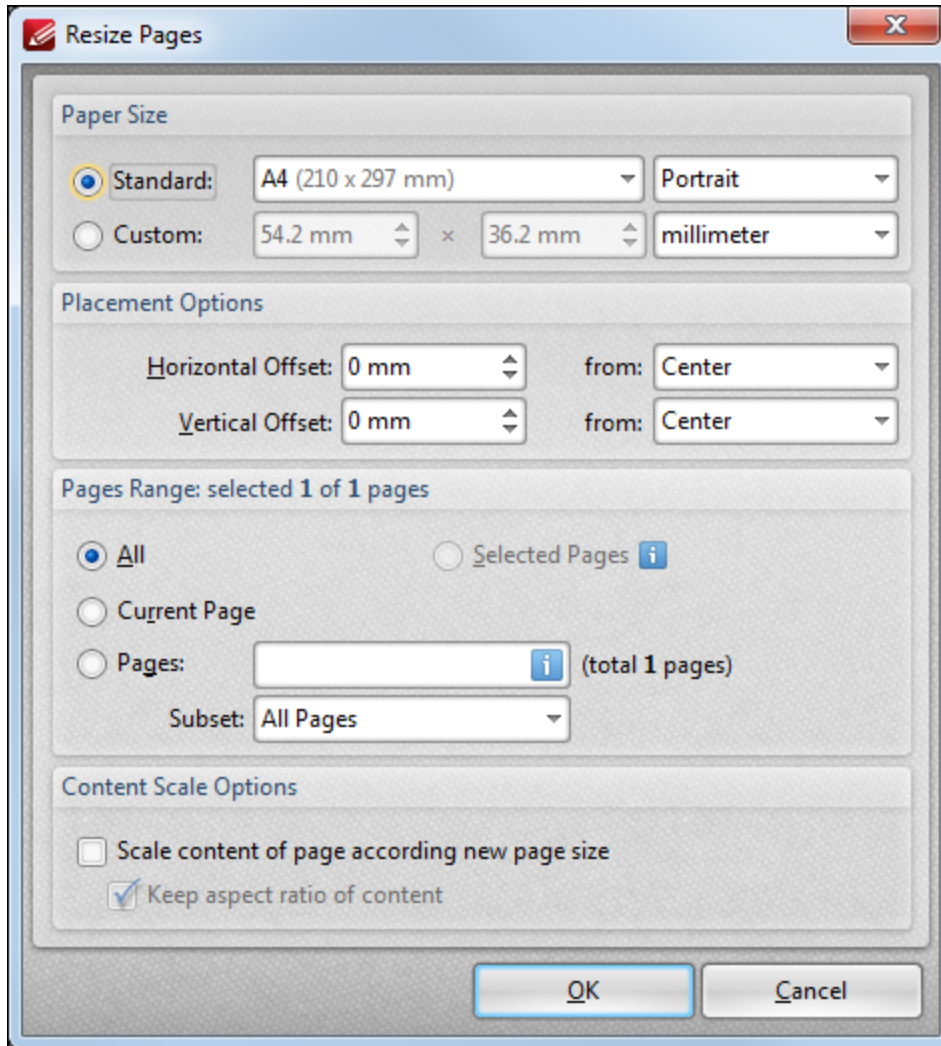
Figure 1. Resize Pages Dialog Box

- The **Paper Size** options determine the size and layout of new pages. Click the **Standard** option button to select standard sizes such as those used by the **ISO** and **ANSI**. Use the menu in the adjacent box to select either **Landscape** or **Portrait** as the page orientation. Alternatively, click the **Custom** option button to enter custom dimensions.
- The **Placement** options determine the horizontal/vertical offset of resized pages and the location from which the offset is made.
- The **Pages Range** settings are as follows:.
  - Select **All** to resize all the pages of the document.
  - Select **Current Page** to resize only the current page.
  - Use the **Pages** box to determine specific pages of the document to be resized. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Content Scale** options determine the scale of the page content in relation to the new page size. Select the **Scale content of page according new page size** box to scale the content of original page to the new page size. This is carried out as far as the aspect ratio will allow. Clear

the **Keep aspect ratio of content** box to scale all content of the original page to the new page size.

- Click **OK** to resize pages.

6.4.14.2 Number Pages

Number Pages

Click **Number Pages** to number document pages and create page ranges:
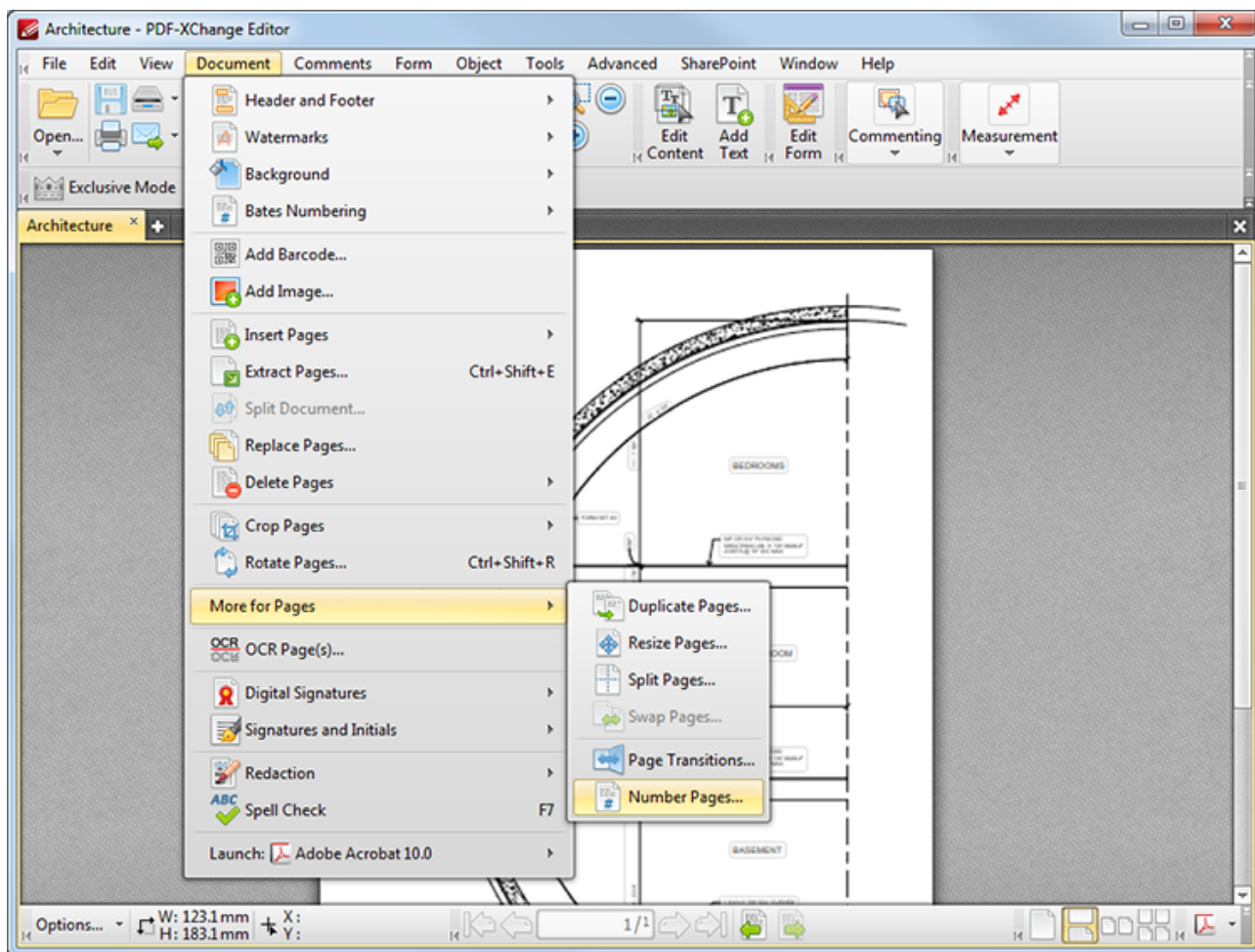
Figure 1. Document Tab Submenu. Number Pages

The following dialog box will open:
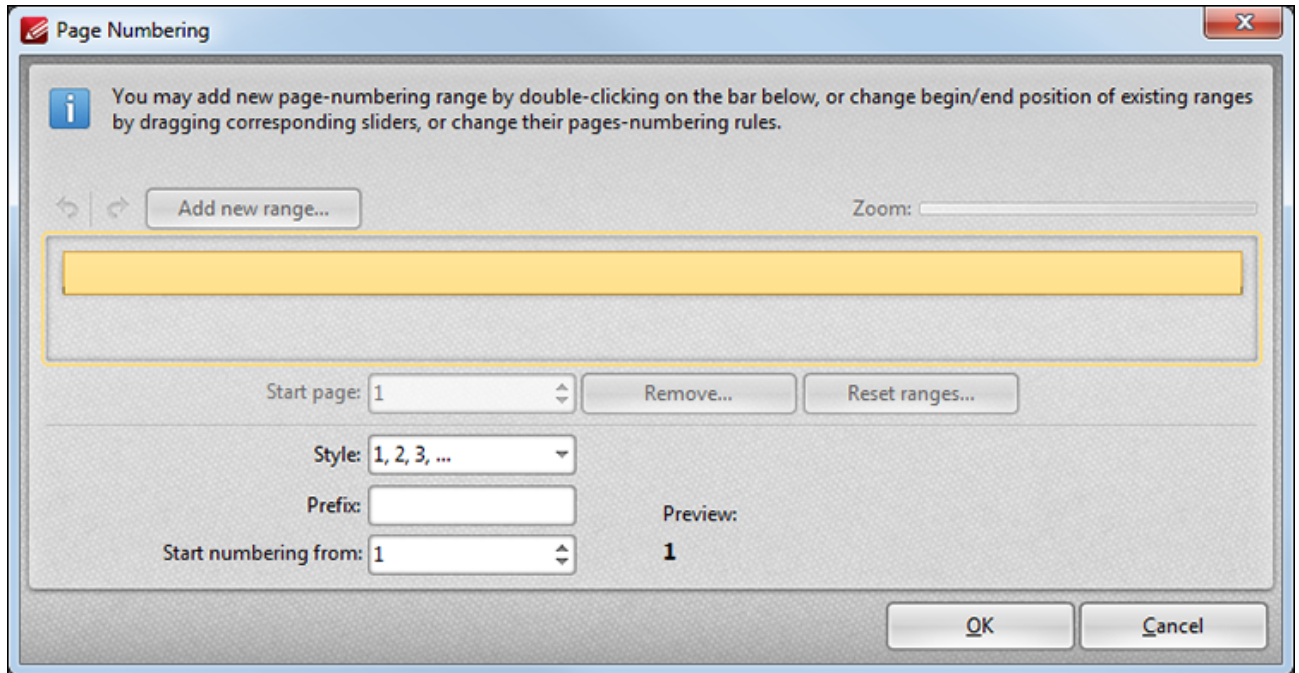
Figure 2. Page Numbering Dialog Box

Please note that this feature relates to page ranges/numbers as they appear in the **Thumbnails Pane.** [497] (The **Header and Footer** [536] feature can be used to create/edit document page numbers). Additionally, it is necessary to select the **Use logical page numbers** box in the **Page Display** [234] preferences tab in order for changes made with this feature to be visible.

- Click the **Add new range** button to add a new page range to the active document. The **Add new range** dialog box will open. Enter the number of the page at which the range is to begin into the number box. (Please note that the default range of all documents starts at 1. Therefore subsequent page ranges must feature a different starting value). Click **OK** to continue the process. Then use the white arrow icon beneath the yellow range bar to determine the page range.
- Click **Remove** to remove the selected page range.
- Click **Reset ranges** to reset all page ranges.
- Use the **Style** menu to determine the numbering style.
- Use the **Prefix** box to add a prefix to page numbers.
- Use the **Start numbering from** box to determine the number from which the numbering begins.
- Use the arrow icons on the left of the **Add New Range** button to redo/undo operations.
- Click **OK** to apply changes.

Number Pages Example

The example below details the page numbering process when numbering the pages of an academic document. The image in *(figure 3)* displays the **Thumbnails** pane before page numbers have been edited:
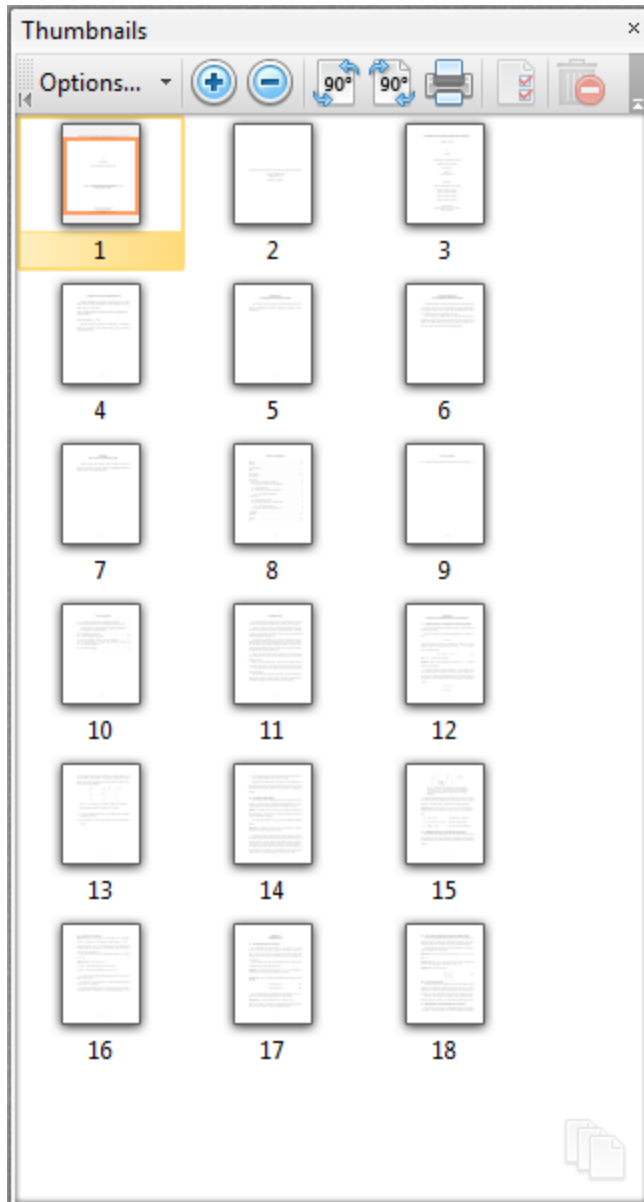
Figure 3. Initial Thumbnails pane

The process detailed above can be used to break the document down into an introduction, opening pages that feature roman numeral numbering, main document, conclusion and references. The **Page Numbering** dialog box would appear as below:
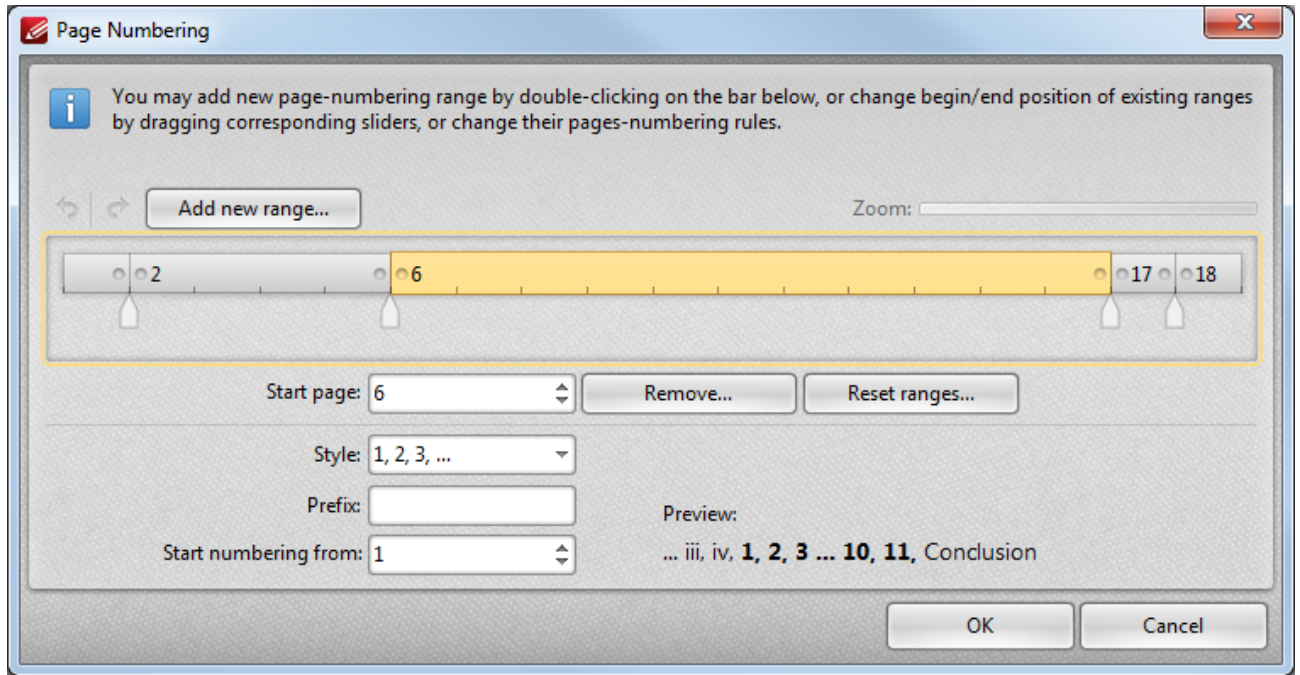
Figure 4. Page Numbering Dialog Box Example

The resultant **Thumbnails** pane appears as below:
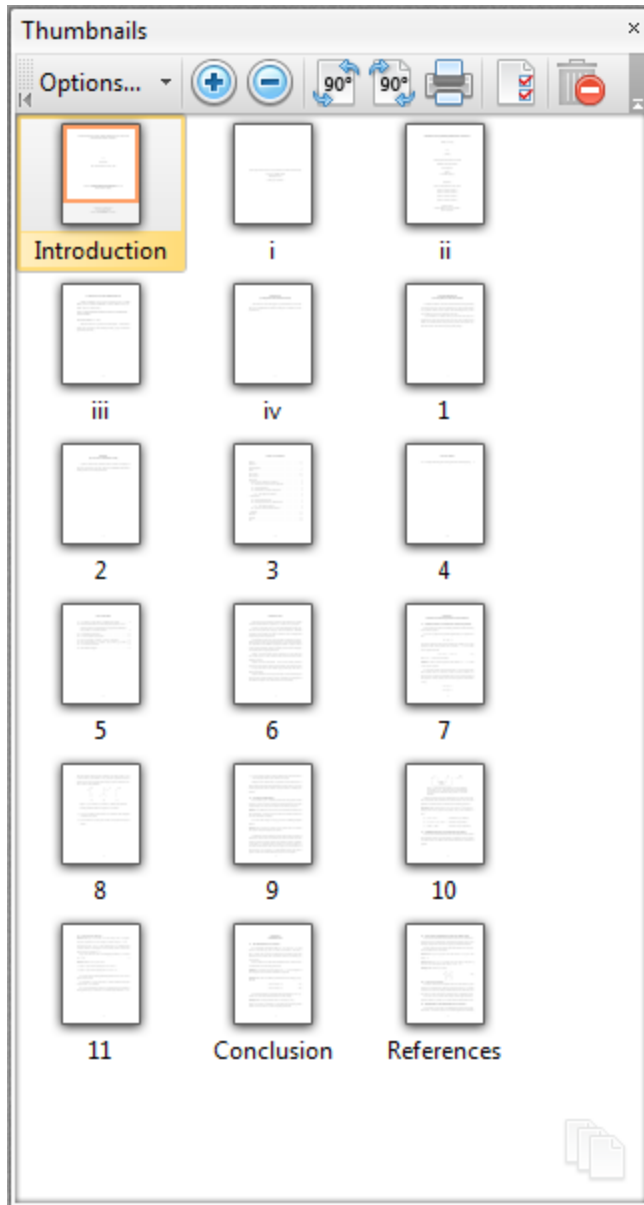
Figure 5. Final Thumbnails Pane

Please note that to use text as the name of a number range it is necessary to select **None** in the **Style** menu and then enter the desried name in the **Prefix** text box. When page ranges have been determined they will be displayed in the **Page Navigation Toolbar** at the bottom of the main window:

Figure 6. Updated Page Navigation Toolbar

Additionally, it is then possible to use this toolbar to browse to customized page ranges. Enter the name of the page range and press **Enter. PDF-XChange Editor** will move to the first page of the desired range.

6.4.14.3 Split Pages

Split Pages

Click **Split Pages** to split document pages:
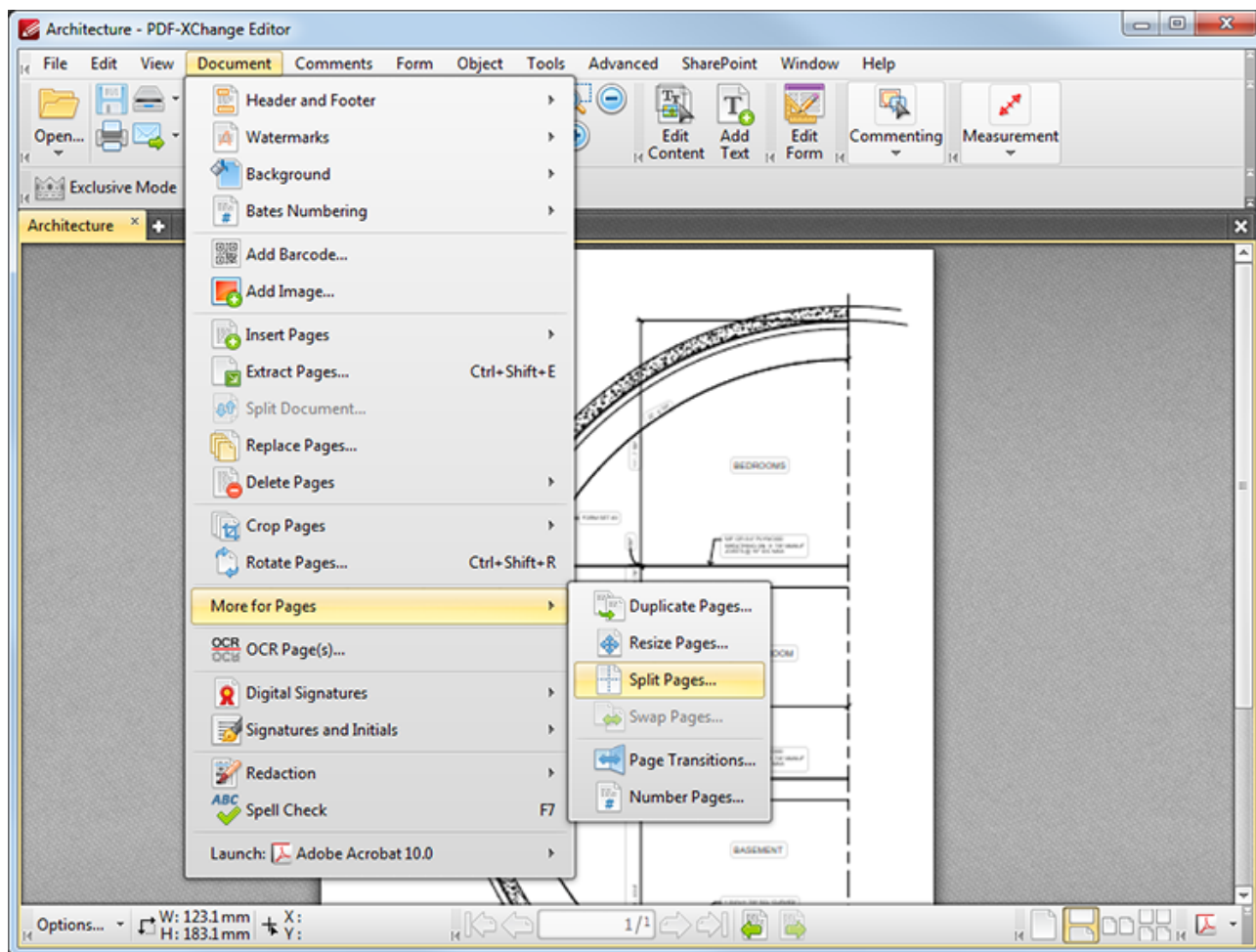
Figure 1. Document Tab Submenu. Split Pages

The following dialog box will open:
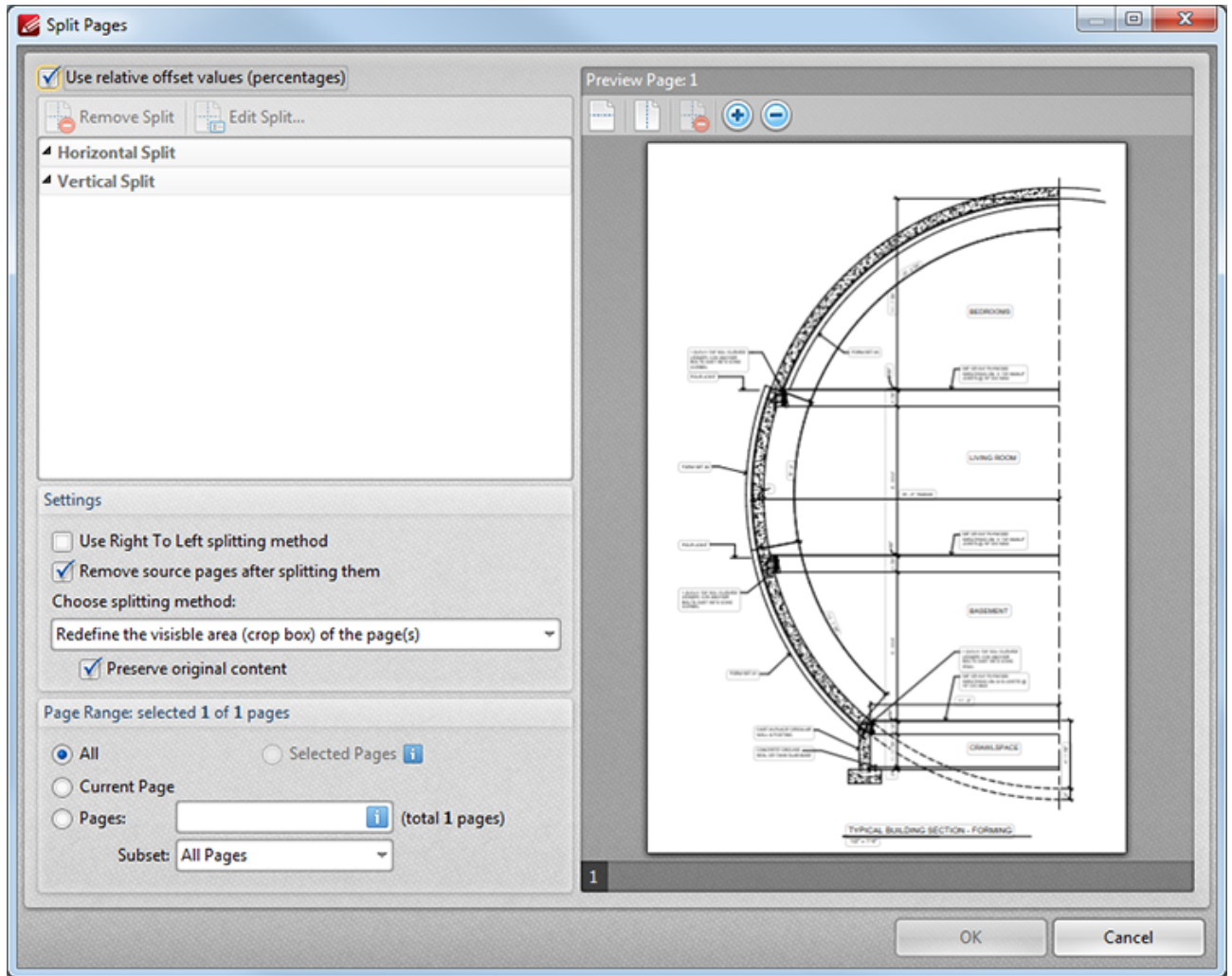
Figure 1. Split Pages Dialog Box

- Select the **Use relative offset values (percentages)** box as desired. This means the dimensions of the split will be shown in percentages instead of standard units of measurement.
- Click the white page icons at the top of the preview pane to perform either a vertical or horizontal split. A corresponding line will appear in the preview pane. Depending on the type of split performed, either the horizontal split or vertical split tab will update in the pane on the left.
- Splits can be edited or removed using the icons at the top of the pane:
  - Click **Remove Split** to remove the split from the list.
  - Click **Edit Split** to edit the dimensions of the split. Enter a new value for the percentage/unit of measurement. The split will update accordingly in the preview pane.
- Use the zoom icons at the top of the of preview pane as desired.
- Select the **Remove source pages after splitting them** to remove the original document from the active pane when pages are split. If this box is cleared then both the original document and the split pages will be present after pages are split.
- Use the **Choose splitting method** menu to determine the manner in which pages are split:

- **Redefine the visible area (crop box) of the page(s)** creates new crop boxes for split pages and means that all underlying data from the original page exists on each of the split pages. See **here** 805 for further information about crop boxes.
- **Change the physical size of the page(s)** splits the the pages and removes any data outside the split areas.
- The **Preserve original content** box is available only when using the **Redefine the visible area (crop box) of the page(s)** option. This option preserves the page's original content.
- The **Pages Range** settings are as follows:
  - Select **All** to split all the pages of the document.
  - Select **Current Page** to split only the current page.
  - Use the **Pages** box to determine specific pages of the document to be split. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- When the desired settings have been selected, click **OK** to split pages.

6.4.15   OCR Pages

OCR Pages

The optical character recognition (OCR) in **PDF-XChange Editor** analyzes image-based documents, recognizes text and then makes it selectable and searchable. Click **OCR Pages** to initiate this operation:
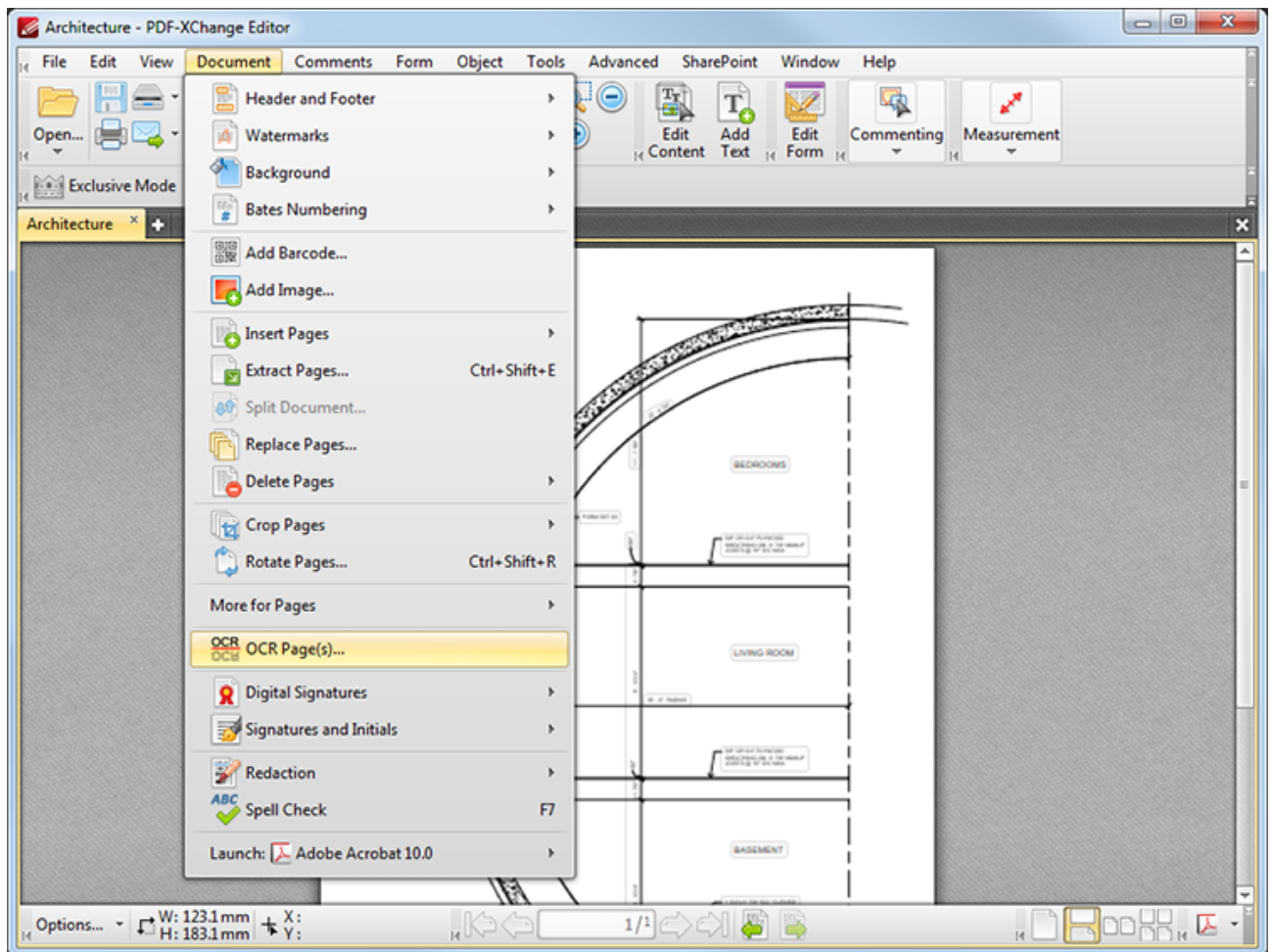
Figure 1. Document Tab Submenu. OCR Pages

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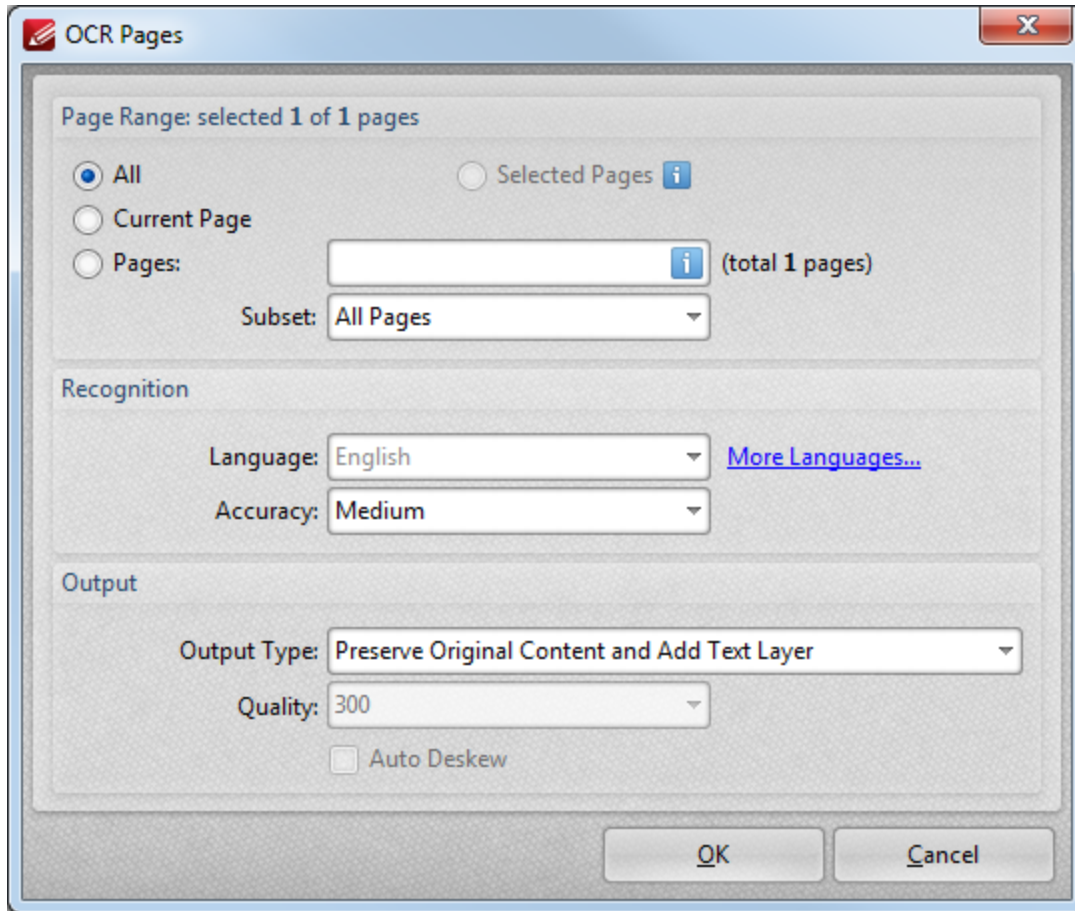
Figure 2. OCR Pages Dialog Box

- The **Pages Range** options are as follows:
  - Select **All** to OCR all the pages of the document.
  - Select **Current Page** to OCR only the current page.
  - Use the **Pages** box to determine specific pages of the document on which to perform the OCR process. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- The **Recognition** options determine the language and accuracy of the OCR process. Increasing the accuracy increases the time that the process takes and vice versa. Additionally, it should be noted that setting the accuracy to high may result in unusual output if the document on which the operation is carried out features imperfections. This is because the software will search to a greater depth and may attempt to recognise imperfections as text.
- The **Output** options determine the format of the output information from the OCR process:
  - Select either **Create New Searchable PDF** or **Preserve Original Content and Add Text Layer**.
  - The **Quality** setting determines the resolution of the new PDF document in dpi (dots per inch).

- Select the **Auto Deskew** option to deskew documents automatically. (Deskewing is a useful feature that straightens images that have been photographed or scanned crookedly).
- Use the **Scanner Presets** 281 page to determine preferences for subsequent use.
- Click **OK** to OCR documents.

6.4.16 **Digital Signatures**

Digital Signatures

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. Hover over **Digital Signatures** to open the following submenu:
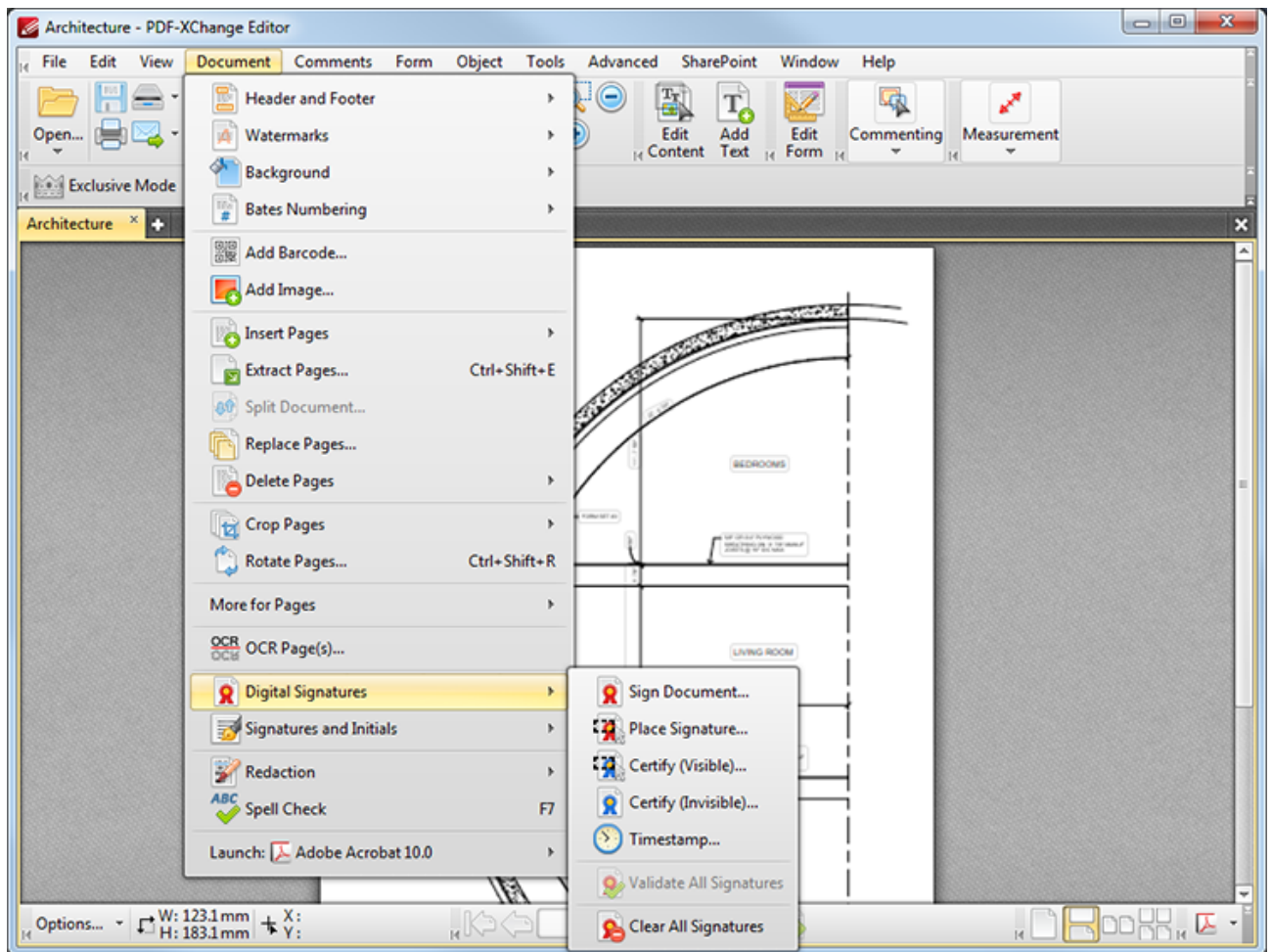
Figure 1. Document Tab Submenu. Digital Signatures

Click **Sign Document** to sign existing signature fields. The dialog box displayed 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 following dialog box will open:
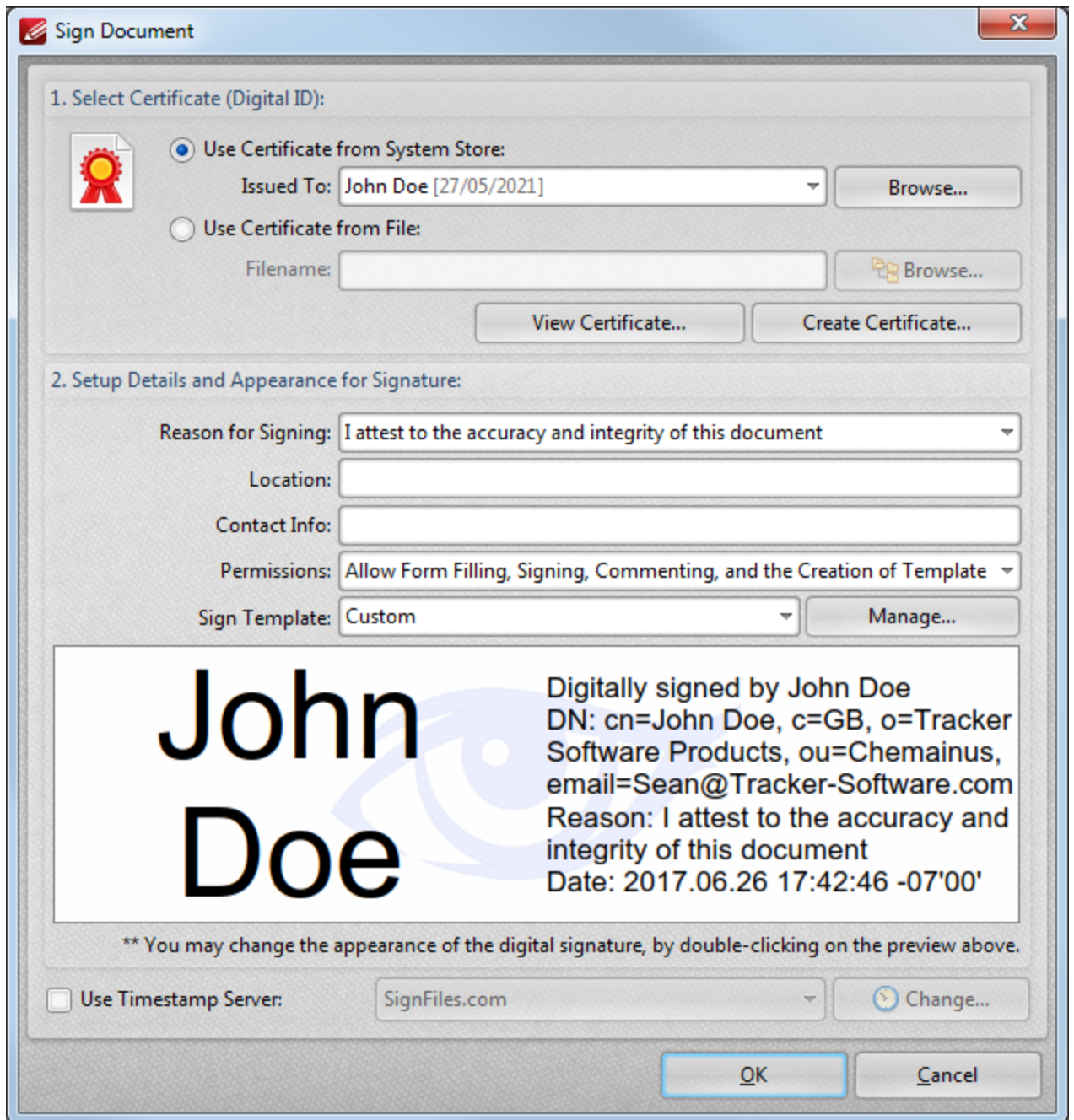
Figure 2. Sign Document Dialog Box

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

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

Click **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 with the exception that the physical signature element is excluded. The document will still be digitally signed.

Click **Timestamp** to add timestamps to documents. The following dialog box will open:
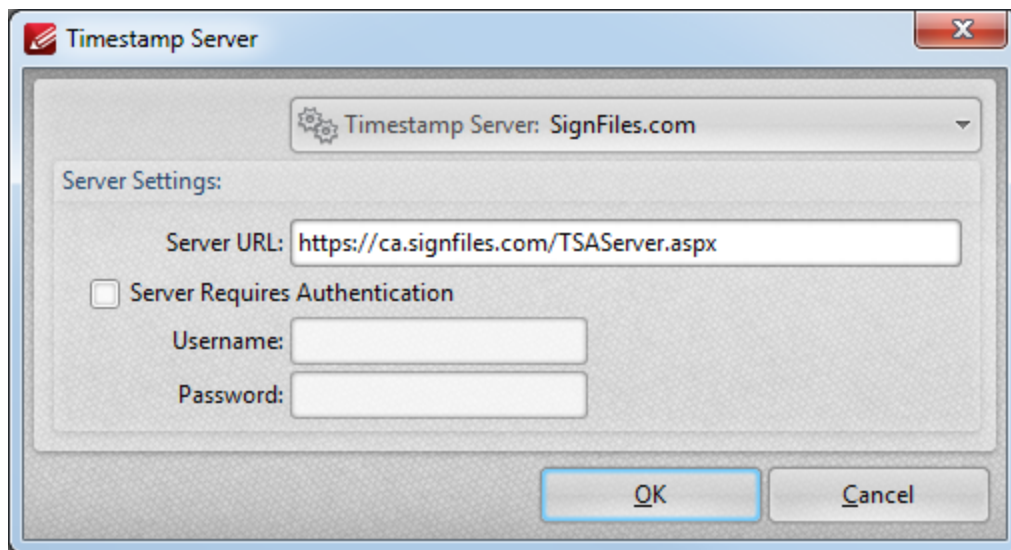
Figure 3. Timestamp Server Dialog Box

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** menu to select the timestamp server to be used.

- 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.
- When the desired details have been entered, click **OK** to timestamp documents.

Click **Validate All Signatures** to validate document signatures. (Please note that, depending on the default settings of the local computer where the files are received, this process may take place automatically).

Click **Clear All Signatures** to clear all digital signatures and certificates (where possible) within the active document.

Please note that when digital signatures have been applied to documents and need to be subsequently verified it is necessary to have the incremental save feature enabled. This feature can be enabled/disabled using the **Documents** settings of the **Preferences** tab, which is available **here.** 232

6.4.17   Signatures and Initials

Signatures and Initials

These options are used to add, manage and edit the visual component of digital signatures. Hover over **Signatures and Initials** to open the following submenu:
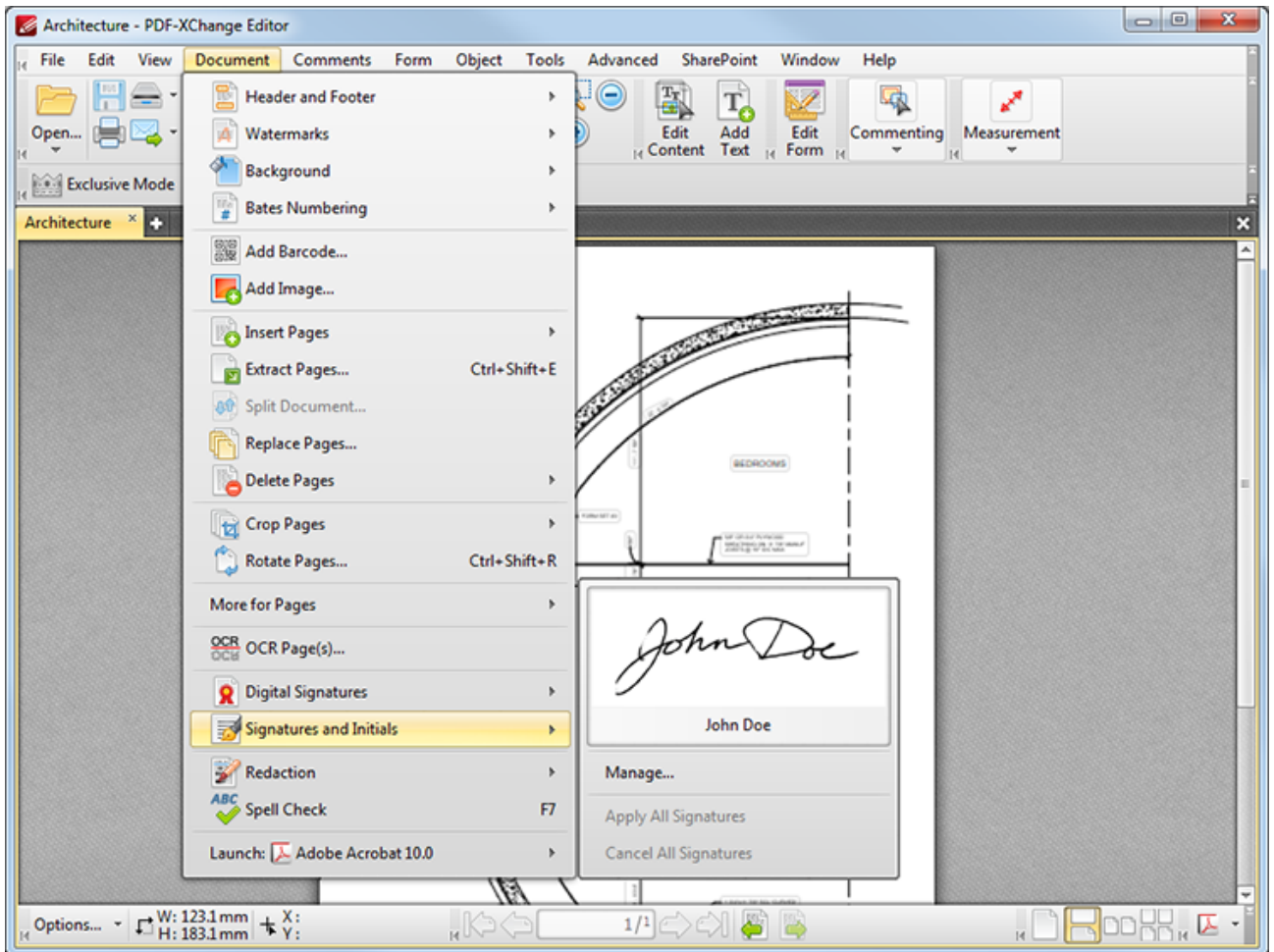
Figure 1. Document Tab Submenu. Signatures and Initials

- Available signatures are displayed at the top of the menu. Click to select signatures and then add them at the desired location. They can then be resized and/or repositioned as detailed **here.** [807]

- Click **Manage** to manage signatures. The dialog box detailed in *(figure 2)* will open.
- Click **Apply All Signatures** to add all signatures to the document. This process converts signatures from editable objects into base document content.
- 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** [215] action can be used to remove applied signatures).

Figure 2. Manage Signatures and Initials Dialog Box

- Click **Add New** to add new signatures to the list of signatures. Import a signature from file or use the **Draw Signature** dialog box to create a new signature.
- Click **Edit** to adjust the signature name and/or password settings of selected signatures.
- Click **Remove/Remove All** to remove selected signatures from the list.

6.4.18   Redaction

Redaction

These options are used to mark document areas for redaction and execute the redaction process. Redaction "blacks out" designated areas. Click **Redaction** to open the following submenu:
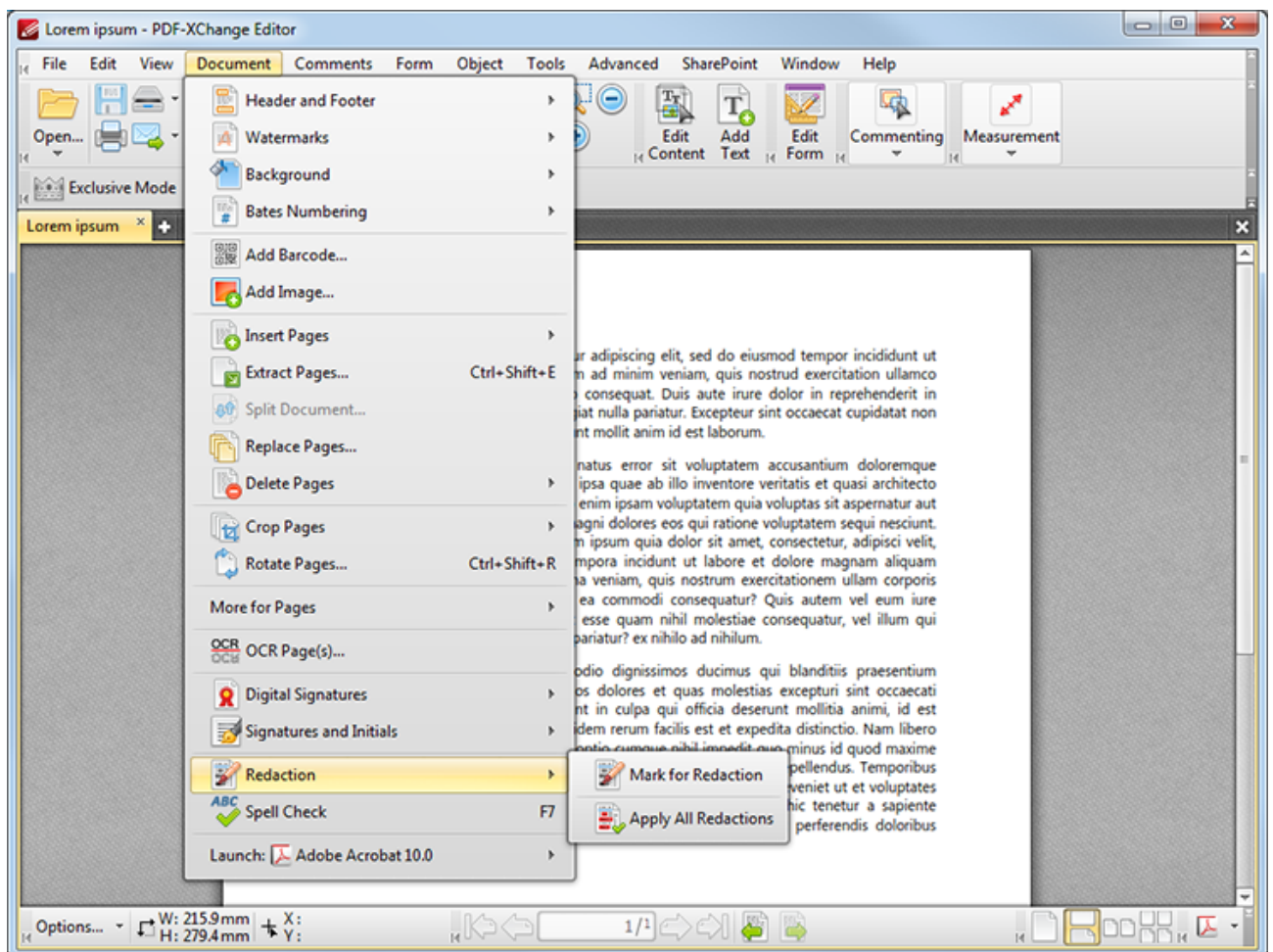
Figure 1. Document Tab Submenu. Redaction

Click **Mark for Redaction** to determine sections of the document for redaction. The pointer will turn into a crosshairs. Click and drag to determine areas. They will appear as below:
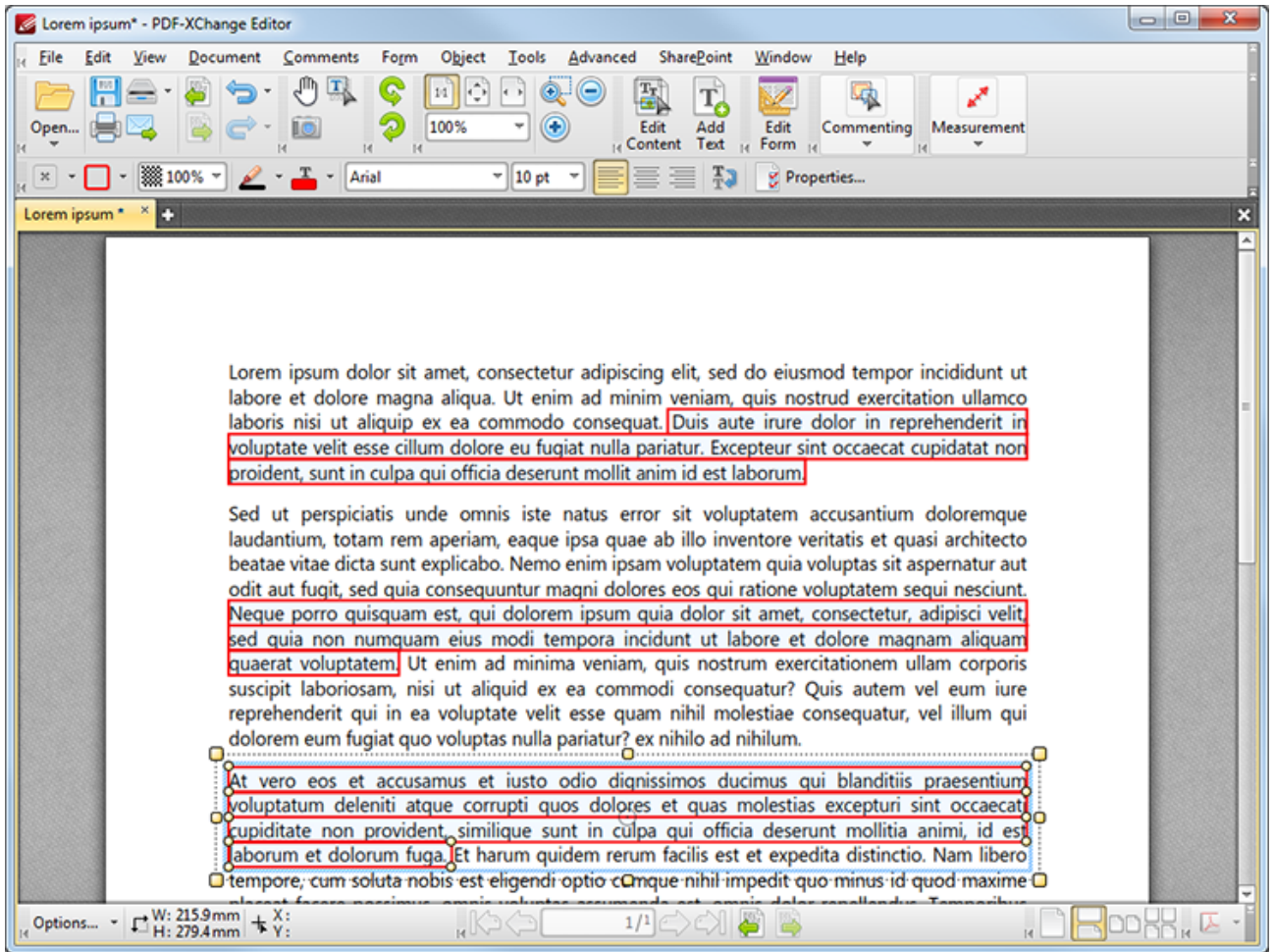
Figure 2. Areas Marked for Redaction

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** ⌐525⌐ to assist in the precise placement of document content.
- 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 **Edit Comments Tool** ⌐661⌐ can be used to select multiple areas).
  - See **here** ⌐865⌐ for an explanation of the remaining options.

Click **Apply All Redactions** to execute the redaction process. Marked areas will be replaced with black fill:
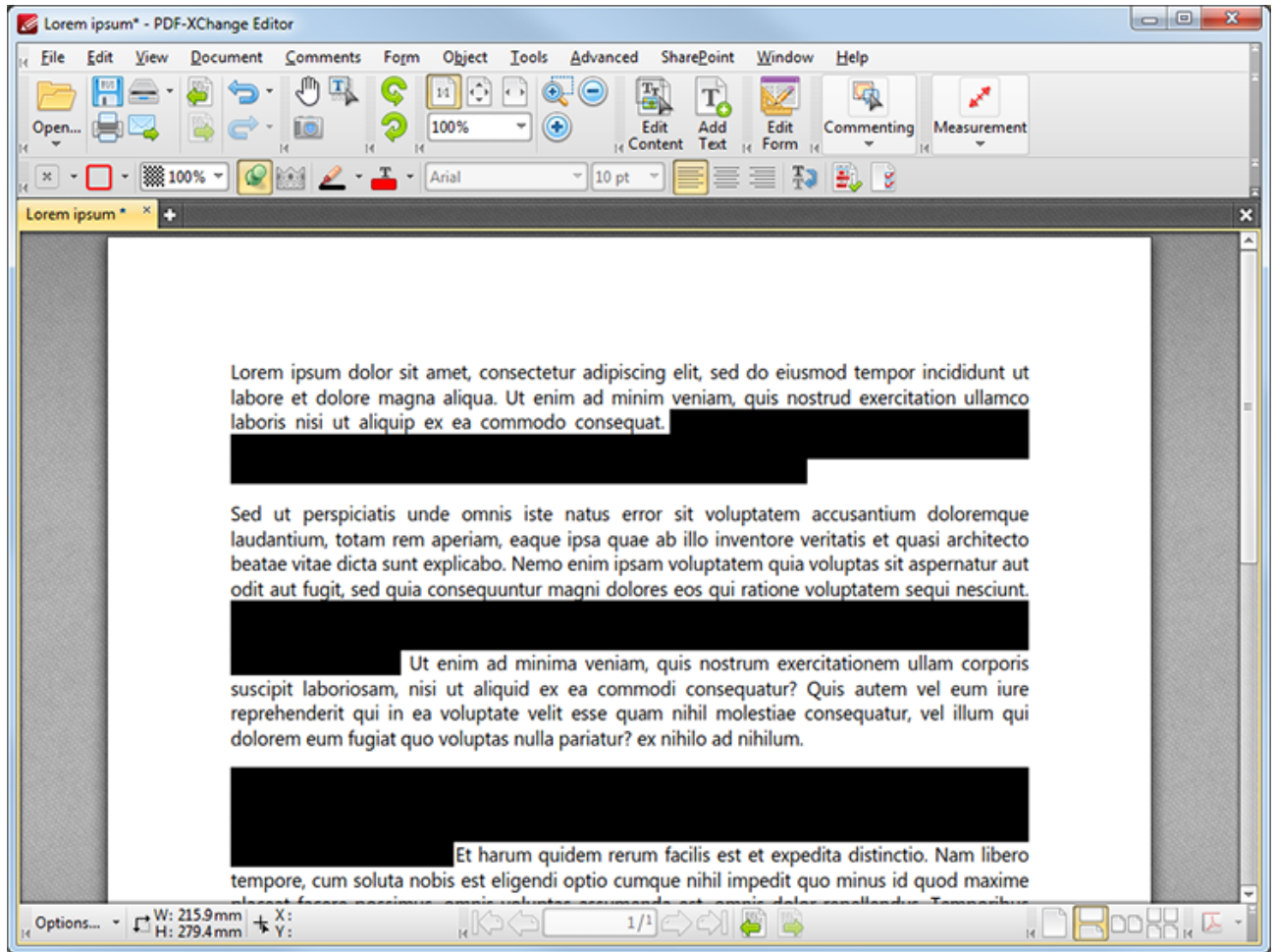
Figure 3. Redacted Areas

When the **Redaction** feature is selected, the following options are enabled in the **Properties Toolbar:** 484

- **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.
- **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 standard manner.
- **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 224 pane (see below) 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.
- Click **Properties** to view/edit the **Redaction Properties** pane. See **here** 869 for further information. The options in the **Overlay** section apply to completed redactions.

6.4.19 **Spell Check**

Spell Check

Click **Spell Check** to launch this feature:
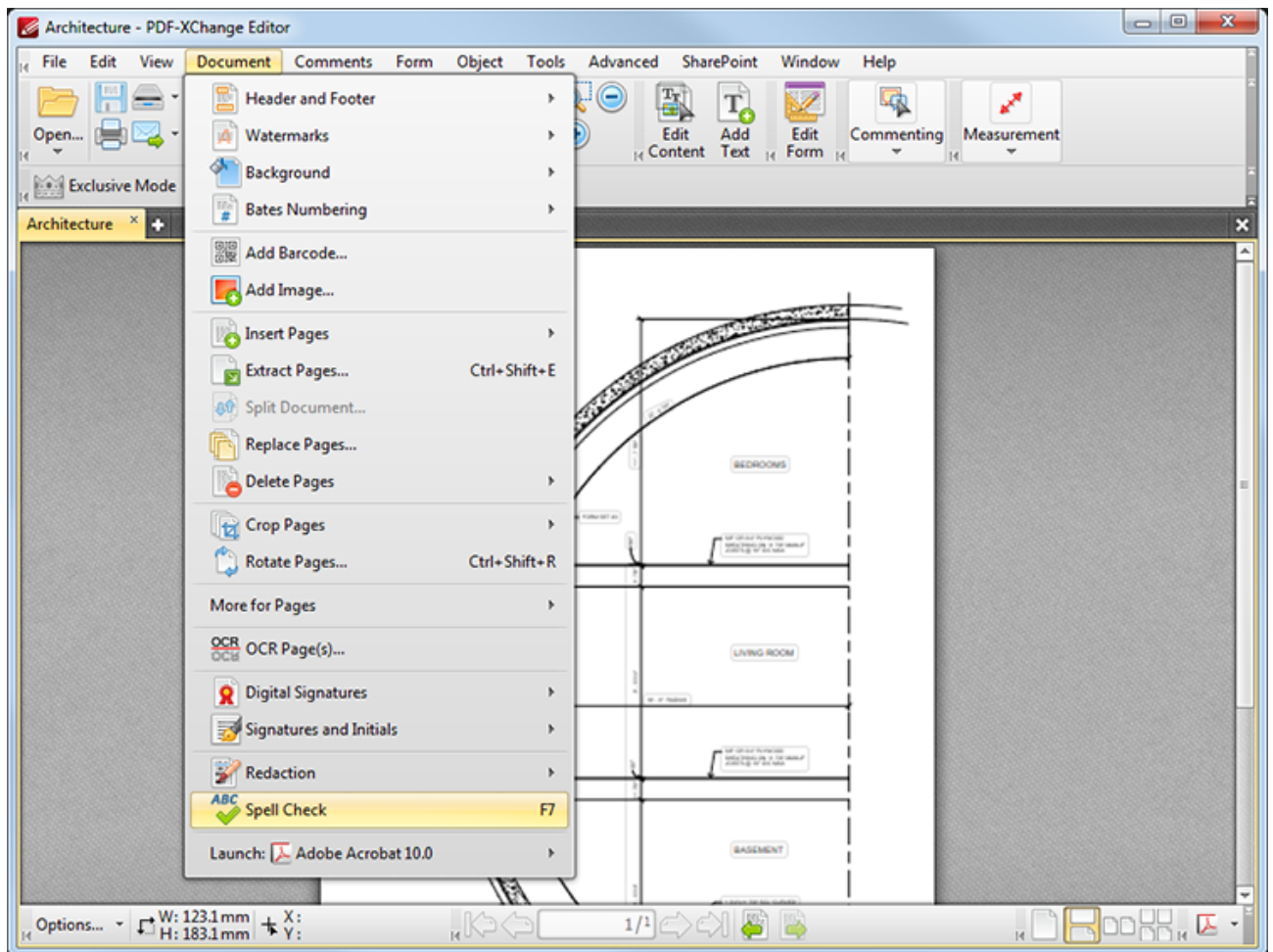
Figure 1. Document Tab Submenu. Spell Check

PDF-XChange Editor will then scan all text within the active document. Words that are not contained within its dictionary will be displayed in the spell check pane:
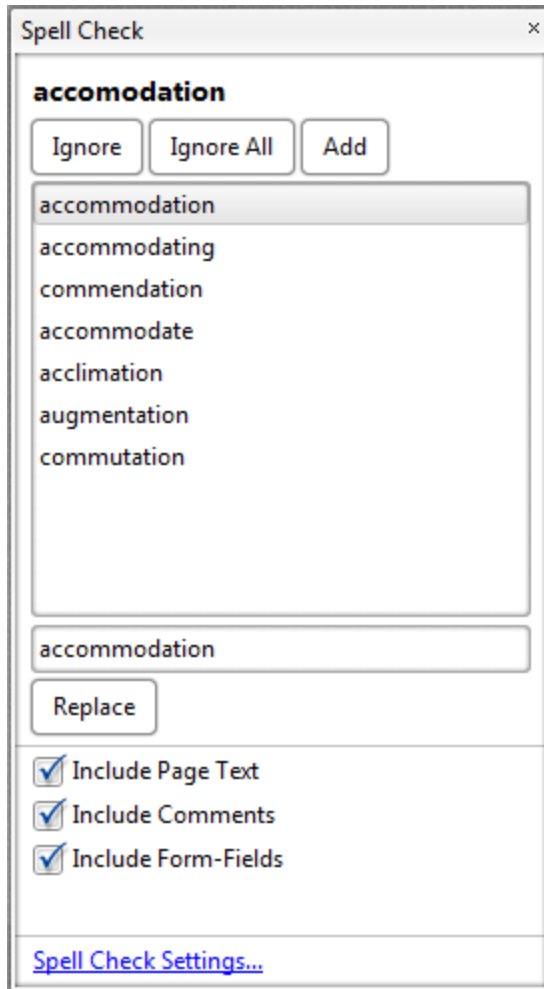
Figure 2. Spell Check Pane

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 will no longer recognize words within the custom word list as incorrectly spelled.
- Use the check boxes to determine the elements of the active document included in the process.
- Click **Spell Check Settings** to access the settings for this feature. See **here** for a list of alternative dictionaries that can be downloaded and used with the **Spell Check** feature.
- Press F7 to enable the spell check feature. F7 is also used to move to the next misspelled word. Press Alt+F7 to move to the previous misspelled word.

6.4.20 **Launch**

Launch

Hover over **Launch** to view a list of applications that have been added to the **Launch Application Toolbar,** ▫482 which is highlighted below:
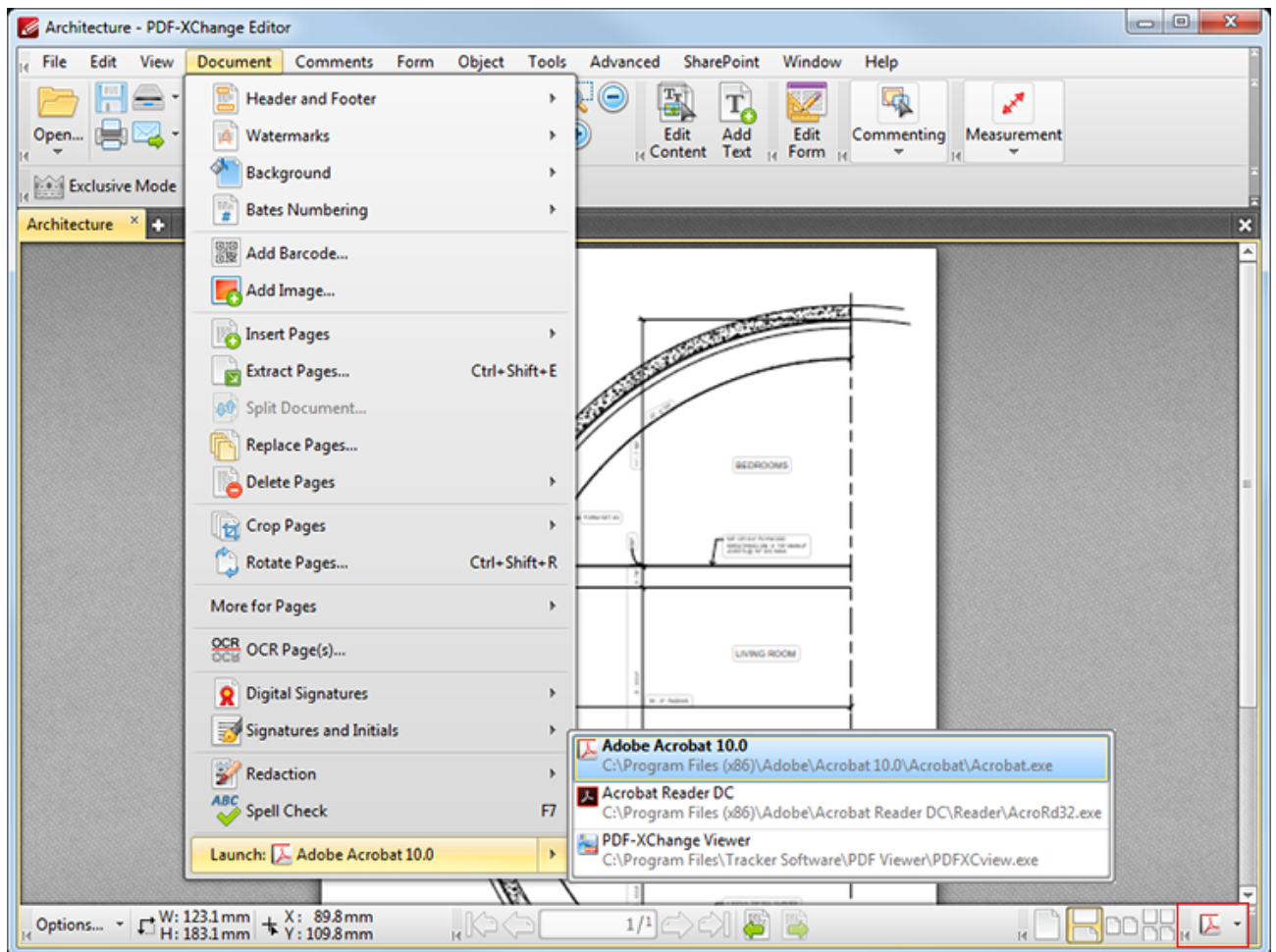
Figure 1. Document Tab Submenu. Launch Options

This toolbar provides a convenient way to launch active documents in an alternative application for viewing PDF files. Click to launch applications. Use the **Launch Applications** ▫289 tab to determine/manage available applications.

6.5 Comments

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

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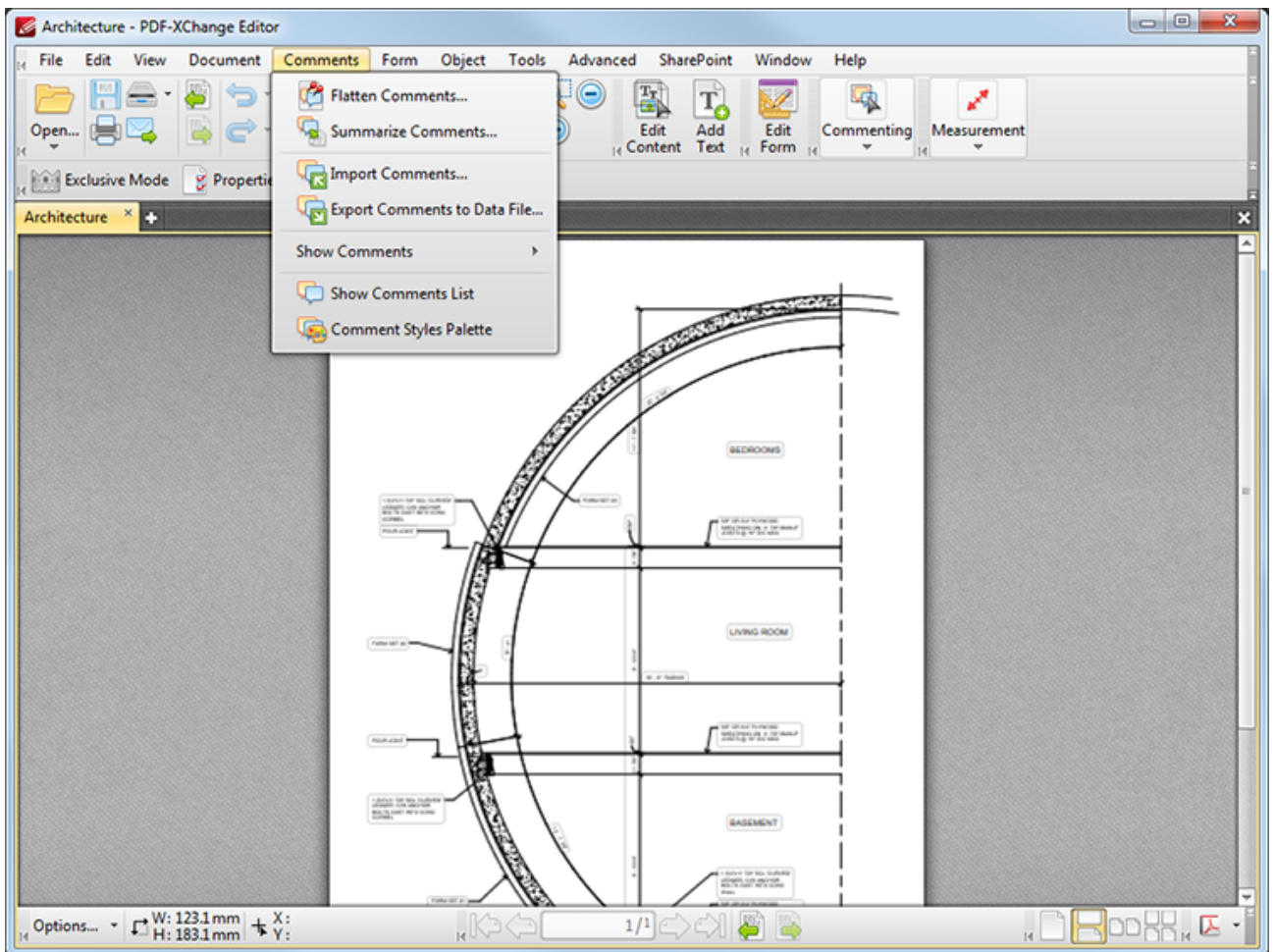
Figure 1. Comments Tab Submenu

Comments are a convenient way to markup and annotate documents without affecting base content. Comments feature customizable options and remain with their associated document at all times. The commands in this tab predominantly relate to the group-editing/management of comments. Comment creation tools and their associated settings are detailed **here.** 632

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

- **Flatten Comments** 613
- **Summarize Comments** 615
- **Import Comments** 619
- **Export Comments to Data File** 621
- **Show Comments** 622
- **Show Comments List** 624
- **Comment Styles Palette** 625

Additionally, please note that several of the keyboard shortcuts relate to comments. See **here** 814 for a comprehensive list of available shortcuts.

6.5.1   **Flatten Comments**

Flatten Comments

Click **Flatten Comments** to flatten comments from the comments layer to the base content layer of documents. This process removes all hyperlinks and flattens fillable forms into selectable text. Flattened comments cannot be edited in the standard manner for comments, but they can be edited as base content, as detailed **here.** 808 The **Flatten Annotations** dialog box will open.
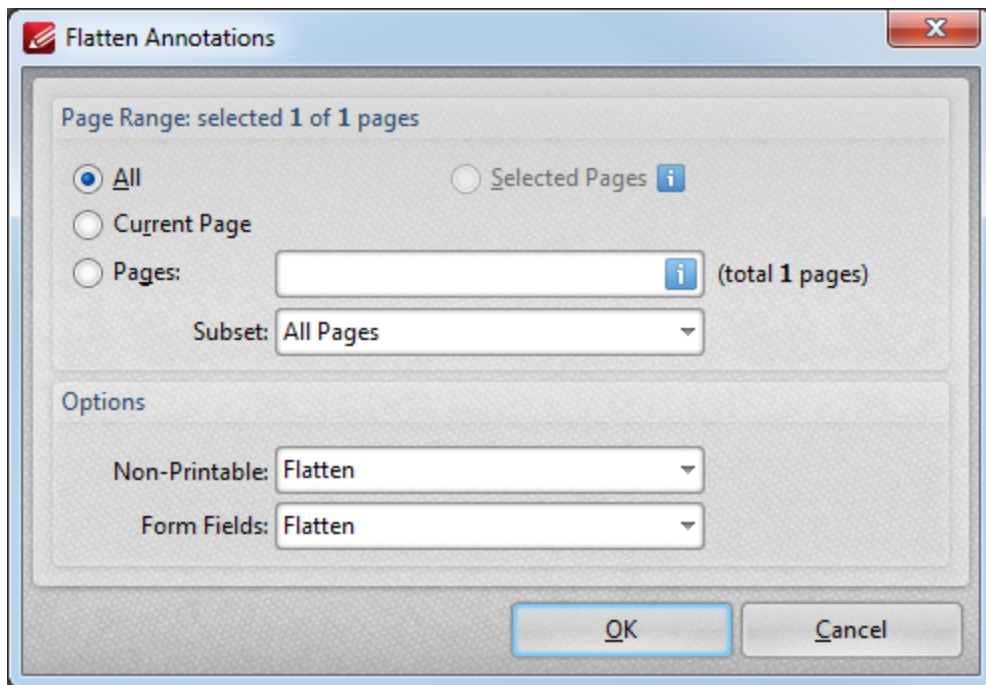
Figure 1. Flatten Annotations Dialog Box

- The **Pages Range** options are as follows:
    - Select **All** to include all pages.
    - Select **Current Page** to include only the current page.
    - Use the **Pages** box to determine specific pages of the document. See **here** 860 for further information.
    - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- There are three options for **Non-Printable** elements and **Form Fields:**
    - **Flatten** will flatten non-printable elements.

- **Left as Is** will retain the existing format for non-printable elements.
- **Remove** will remove non-printable elements from the document.
- When the desired settings have been selected, click **OK** to flatten comments.

6.5.2　　**Summarize Comments**

Summarize Comments

Click **Summarize Comments** to create a summary of document comments. The **Summarize Comments** dialog box will open:
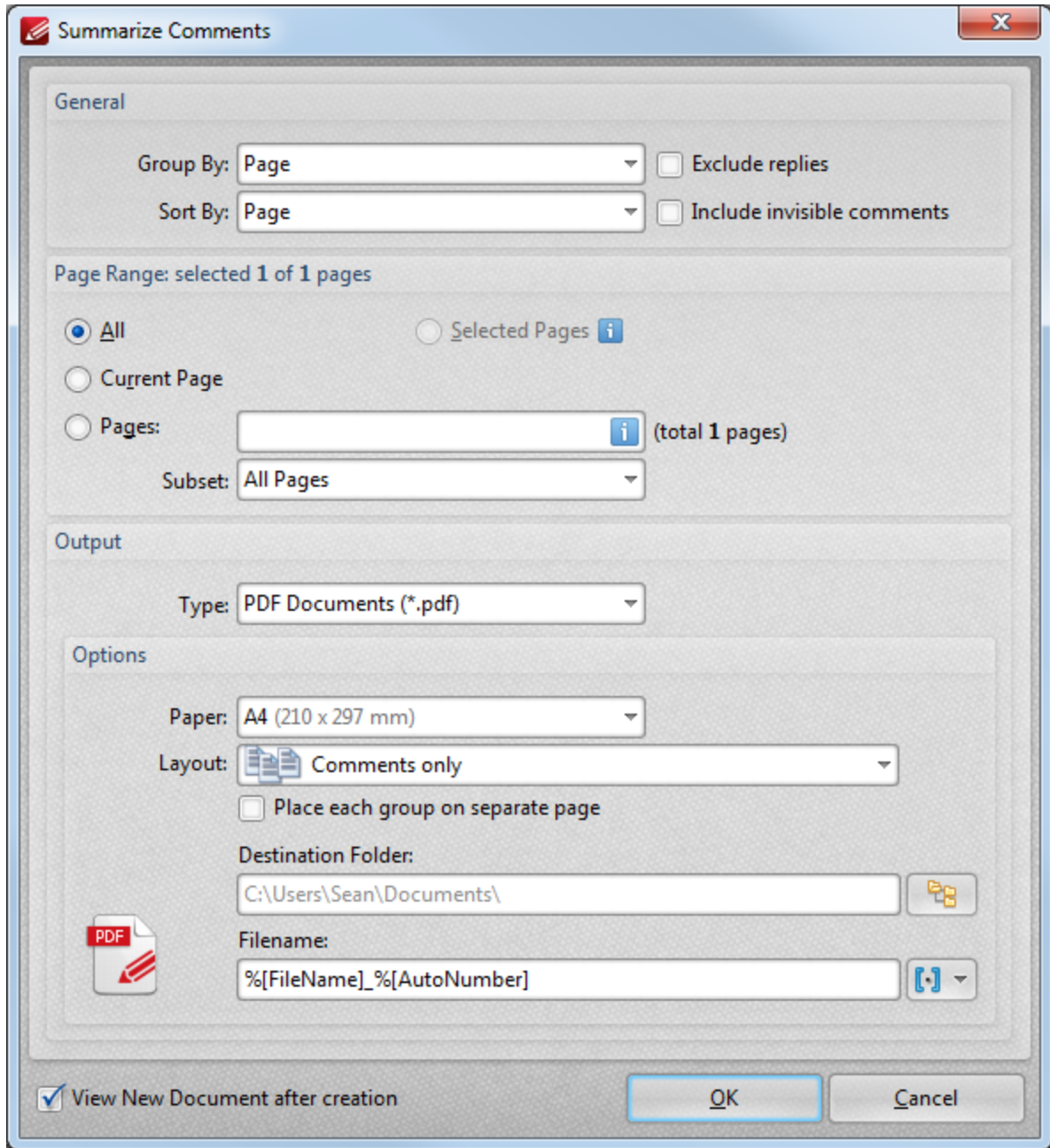
Figure 1. Summarize Comments Dialog Box

- The **Group by** setting determines the element through which comments are grouped. The options are as follows:
    - **Page**
    - **Type**
    - **Author**
    - **Date**
    - **Subject**

- The **Sort by** setting determines the element through which comments are sorted within the group. The options are the same as those in the **Group by** setting with the additional option **Visual Order.** This option sorts comments according to the visual order in which they appear in the active document.
- Select the **Exclude replies** box to exclude replies to comments from the summary.
- Select the **Include invisible comments** box to include invisible comments in the summary.
- The **Pages Range** options are as follows:
  - Select **All** to include all pages in the process.
  - Select **Current Page** to include only the current page.
  - Use the **Pages** box to determine specific pages of the document. See **here** 860 for further information.
  - Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Use the **Output** menu to determine the summary format. The options are as follows:
  - **PDF Documents**
  - **Rich Text Format**
  - **Plain Text**
  - **HTML Files**
  - **CSV**
- The options for **PDF Documents** are as follows:
  - **Paper** determines the paper size used for the summary document.
  - **Layout** determines the layout of the summary document.
  - Select the **Place each group on separate page** box as desired.
  - Use the **Destination Folder** box to determine the destination folder for the summary document, or click the icon to select a folder on the local computer.
  - Use the **File Name** option to determine the name of the summary document. Use the macro menu to add **macros.** 830
- The options for **Rich Text Format** are the same as those for **PDF Documents** with the exception that the **Layout** option is not available.
- The **Plain Text** format features a setting for **Text Encoding.** Select an option from the menu as desired. The remaining settings are covered in the **PDF Documents** section.
- The options for **HTML Files** and **CSV** are covered in the **PDF Documents** section.
- Select the **View New Document after creation** box to open the document immediately after it is created.
- When the desired settings have been selected, click **OK** to create the summary of document comments.

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 annotations in order to include it in the comment summary. (This is true for all comments that feature pop-up notes). There are settings in the **Commenting Preferences** 275 that automatically add annotated text to the associated pop-up note of annotations.

6.5.3 Import Comments

Import Comments

Click **Import Comments** to import comments into the active document. The **Open Files** dialog box will open:
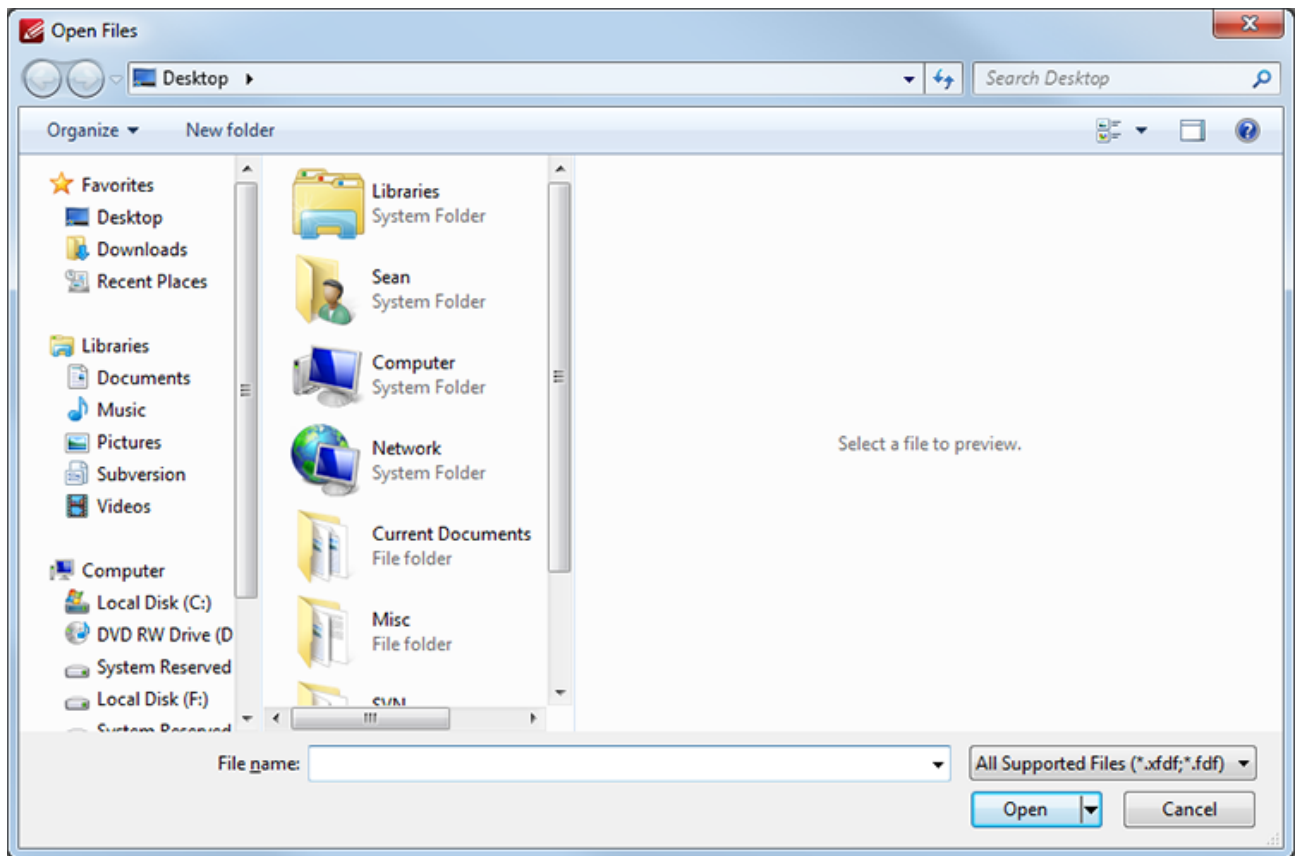
Figure 1. Open Files Dialog Box

Select the desired file and click **Open** to import.

Comments can also be imported from a Form Data Format (FDF) file or an XFDF file. FDF format is the file format used when submitting, receiving and incorporating form data to a server. It can also be used to export form data to stand-alone files that can be stored, electronically transmitted and imported back into the corresponding PDF interactive form.

The positioning of imported comments matches that of the file from which they were imported. If comments appear to be placed incorrectly then it is probable that the source and recipient PDF files are different in format. For example, if comments from a ten-page document are imported into a two-page document, then only comments from the first two pages will appear.

6.5.4   Export Comments to Data File

Export Comments to Data File

Click **Export Comments to Data File** to export comments from the active document. The **Save File** dialog box will open:
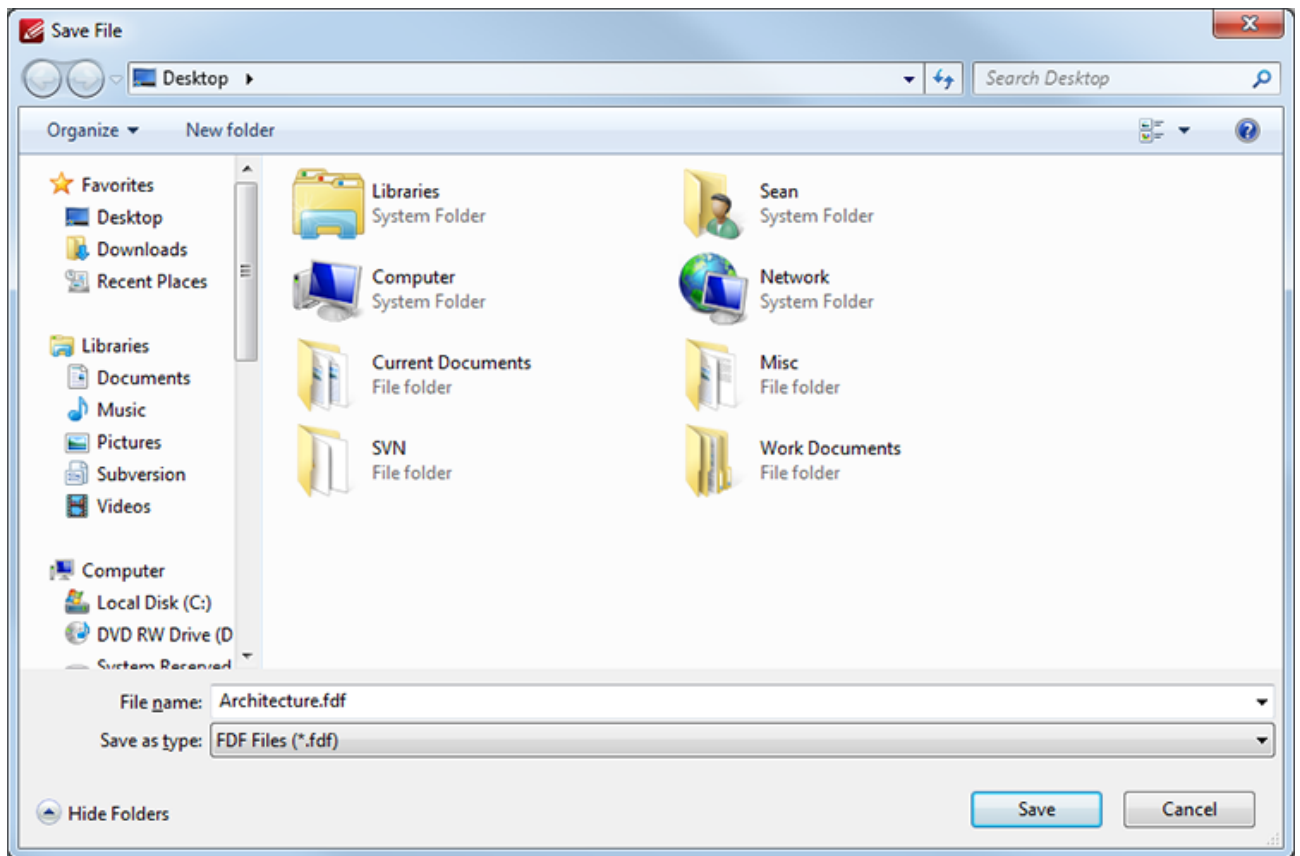
Figure 1. Save File Dialog Box

Select a folder in which to save the exported comments file. The default folder is the same as that in which the active document is located. Enter a name for the file in the **File Name** box and click **Save.**

6.5.5 Show Comments

Show Comments

Hover over **Show Comments** to launch the Show Comments submenu:
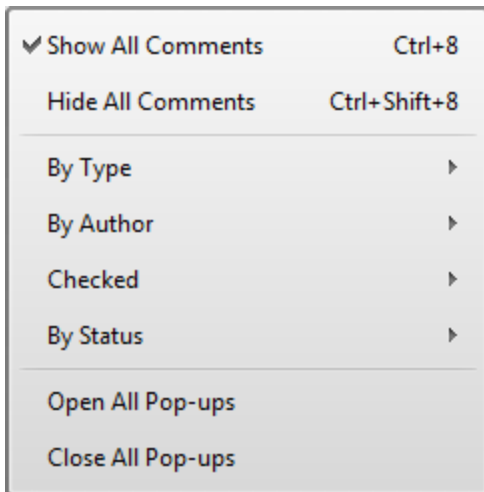
Figure 1. Show Comments Submenu

This menu determines which comments are displayed/hidden:

- Select **Show All Comments** to display all comments.
- Select **Hide All Comments** to hide all comments.
- Comments can also be displayed according to their properties:
  - Select the **By Type** option to determine comments that will be displayed according to their type. When this option is selected, a menu will be displayed that features all the types of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
  - Select the **By Author** option to determine comments that will be displayed according to their author. When this option is selected, a menu will be displayed that features all authors of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
  - Select the **Checked** option to determine comments that will be displayed according to whether or not they are checked in the options of the **Show Comments** pane. When this

option is selected, a menu will be displayed that features two options. Select **All** to display all comments. Select **Unmarked** to display only unmarked comments.

- Select the **By Status** option to determine comments that will be displayed according to their status. When this option is selected, a menu will be displayed that features all the statuses of comments that are contained within the active document, as well as an option for **All.** The options selected determine the comments that are displayed.
- Select **Open All Pop-ups** or **Close All Pop-ups** as desired.

6.5.6   Show Comments List

Show Comments List

Click **Show Comments List** (or press Ctrl+M) to launch the **Comments Pane.** ⁵¹⁴

6.5.7   **Comment Styles Palette**

Comment Styles Palette

Click **Comment Styles Palette** to launch the **Comment Styles Palette** pane:
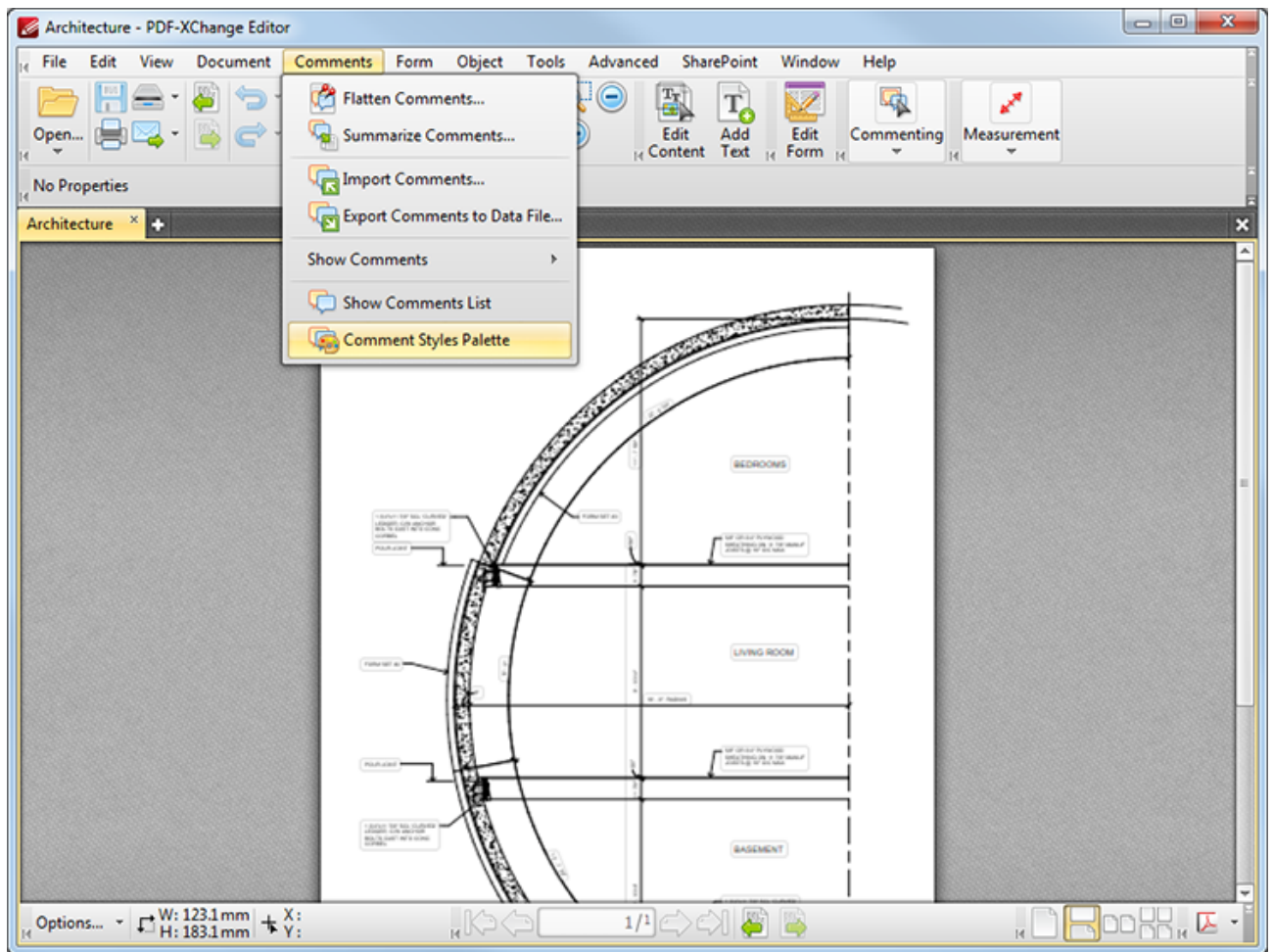
Figure 1. Comments Tab Submenu. Comment Styles Palette

The **Comment Styles Palette** will open:
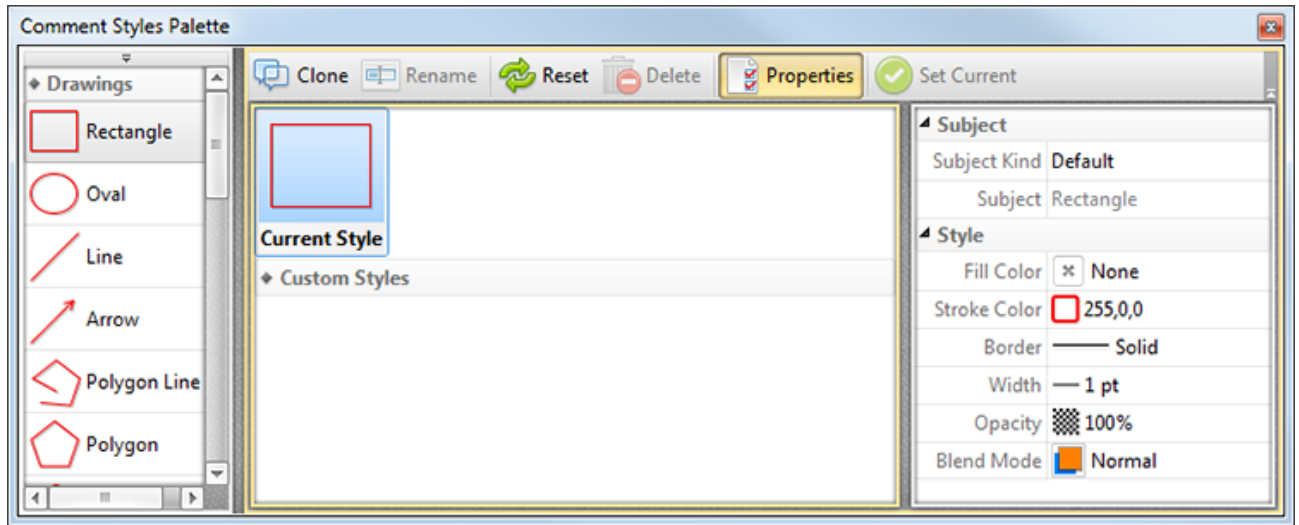
Figure 2. Comment Styles Palette

This palette details the current styles for comments. The default styles for **Drawings, Measurement, Text Boxes, Text Markups** and **Text Notes** are shown in the pane on the left. Select a style to preview it in the central pane. The following options are then available:

- Click **Clone** to clone the selected style. This allows the style to be edited and saved under a new profile for subsequent use. Click the **Properties** tab to edit the parameters of the clone. Click parameters in the **Properties** pane to adjust them.
- Click **Rename** to give the cloned style a custom name.
- Click **Reset** to reset the parameters of a cloned style after they have been changed.
- Click **Delete** to delete the selected style.
- The properties of the default styles can also be edited using the **Properties** tab. See **here** 224 for further information.
- Click **Set Current** to set the selected style selected as the active style.

6.6 Form

Form

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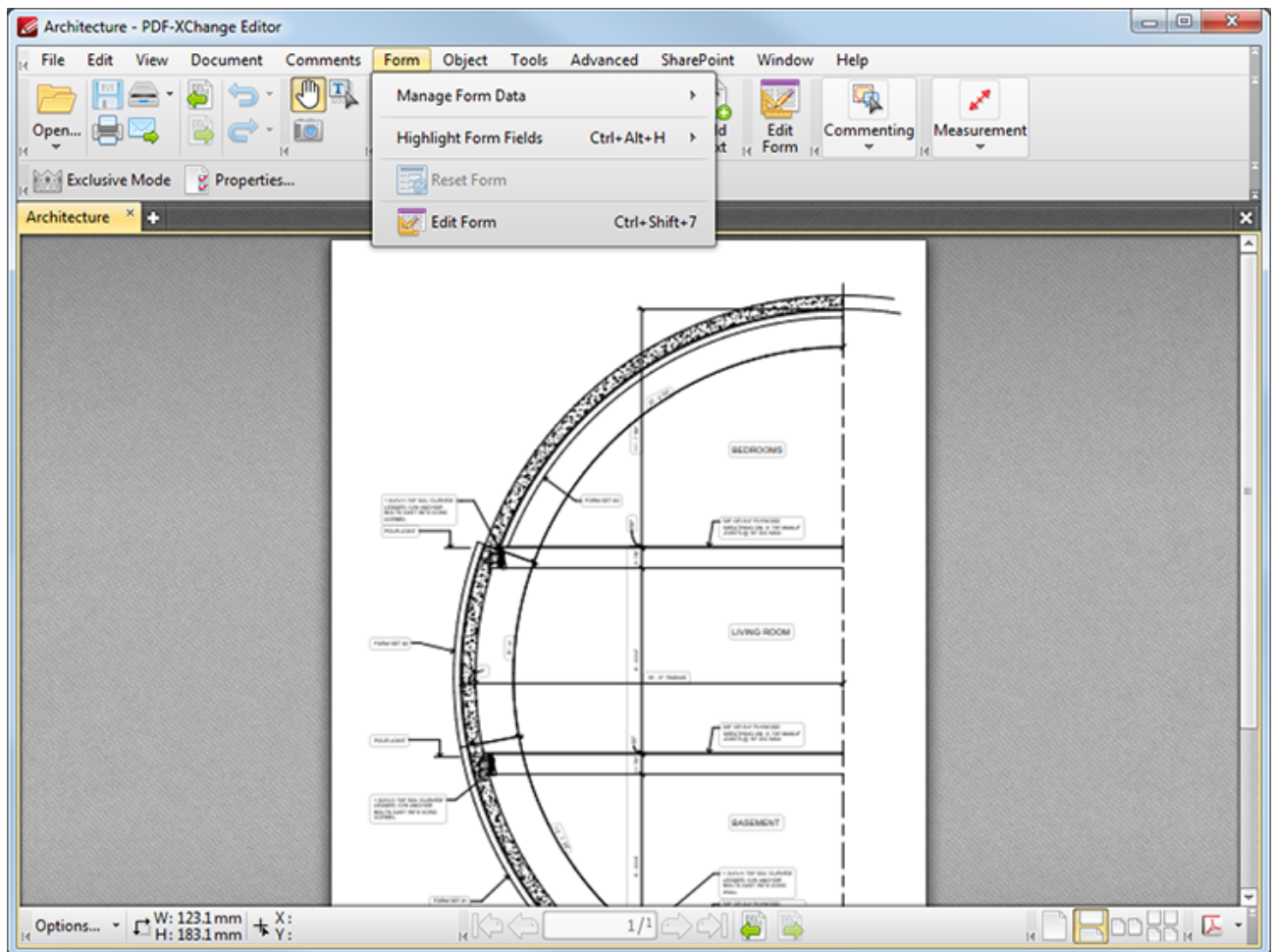
Figure 1. Form Tab Submenu

These options facilitate the editing of form fields:

- Hover over **Manage Form Data** to open the **Form Data** submenu:

- Click **Import Data** to import data from an FDF file to an Acroform within the active document. The **Open Files** dialog box will open. Select the desired files and click **OK** to import.
- Click **Export Data** to export data from an Acroform within the active document to an FDF file. The **Save Files** dialog box will open. Enter a name for the new file and click **Save** to export selected form data.
- Click **Highlight Form Fields** to highlight form fields in the active document. Alternatively, hover over **Highlight Form Fields** and select an option from the dropdown menu, then click to highlight forms of the selected format.
- Click **Reset Form** to reset all forms.
- Click **Edit Form** to enable the editing/creation of forms as detailed **here.** 320

6.6.1   **Object**

Object

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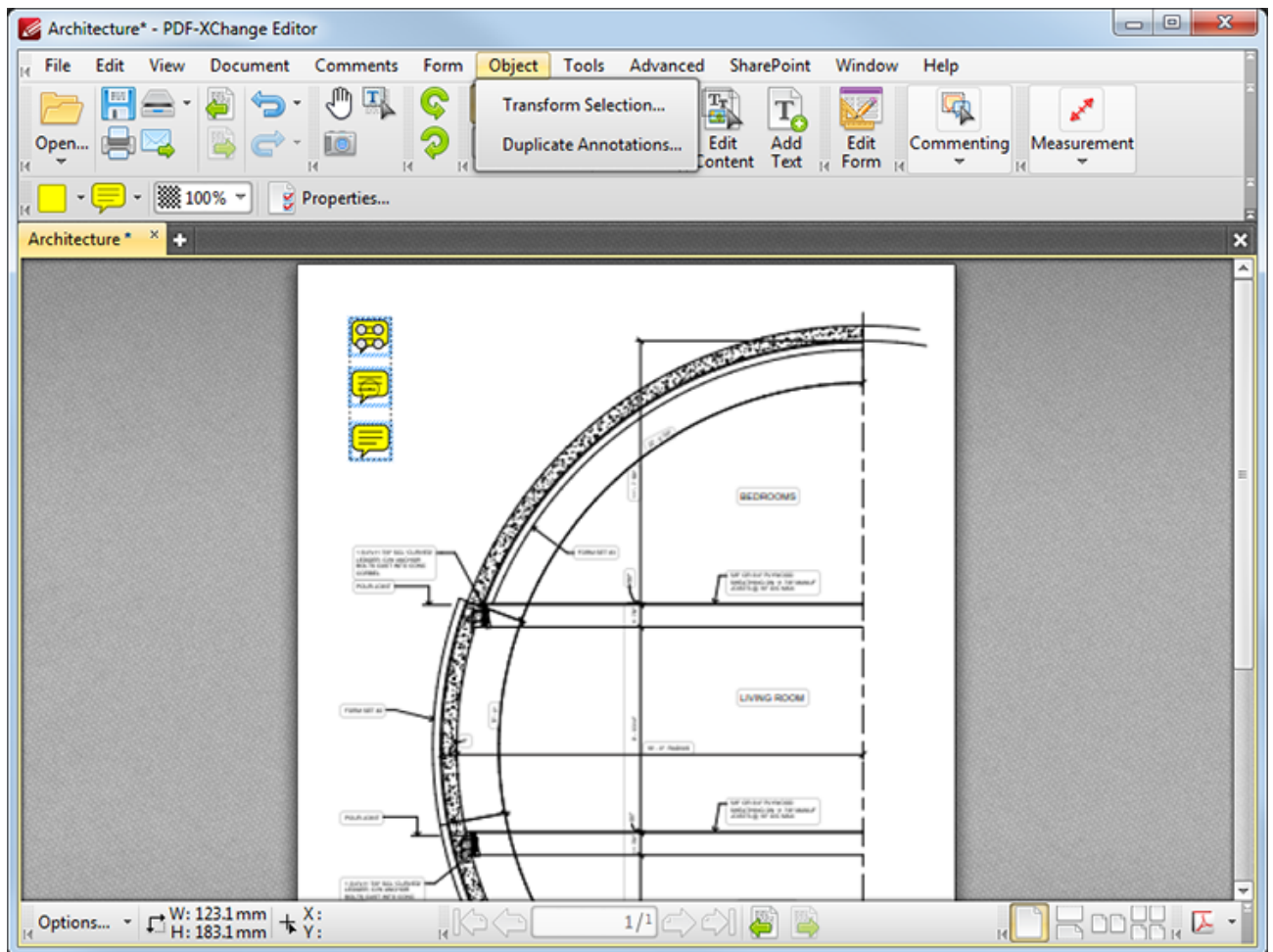
Figure 1. Object Tab Submenu

These options facilitate the transformation/duplication of selected objects:

Click **Transform Selection** to edit the position, size and rotation of selected objects. The following dialog box will open:
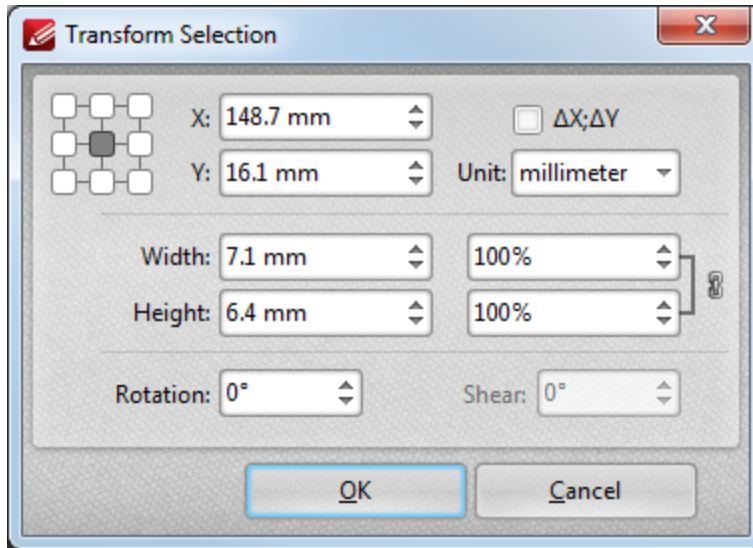
Figure 2. Transform Selection Dialog Box

- The **X** and **Y** number boxes determine the repositioning of the selected object. The **X** value is the horizontal plane and the **Y** value is the vertical plane.
- Select the ΔX; ΔY box to determine offset values relative to the current position of the object.
- Use the **Unit** menu to select the units of measurement.
- Use the **Width** and **Height** boxes to adjust the size of the selected object.
- Use the **Rotation** box to determine in degrees the rotation of the selected object.
- Use the **Shear** box to determine a shear angle. This will slant the selected object along a horizontal axis.
- When the desired parameters have been selected, click **OK** to transform selected content.

Click **Duplicate Annotations** to duplicate selected annotations. The following dialog box will open:
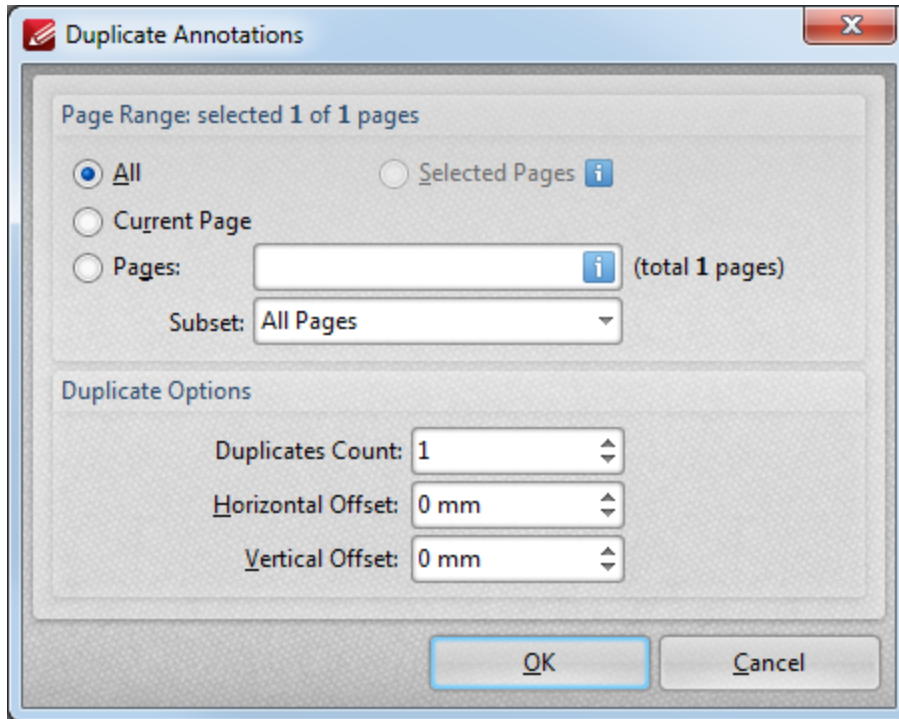
Figure 3. Duplicate Annotations Dialog Box

- Use the **Page Range** settings to determine the pages on which selected annotations are duplicated:
  - Click **All** to select all document pages.
  - Click **Current Page** to duplicate it on the active page.
  - Click **Pages** to determine a page range. See **here** [860] for page range options.
- Use the **Duplicate Options** setting to determine duplicate parameters:
  - Use the **Duplicates Count** box to determine the number of duplicates created.
  - Use the **Horizontal Offset** box to determine the horizontal offset.
  - Use the **Vertical Offset** box to determine the vertical offset.
  - Click **OK** to duplicate annotations.

6.7 Tools

Tools

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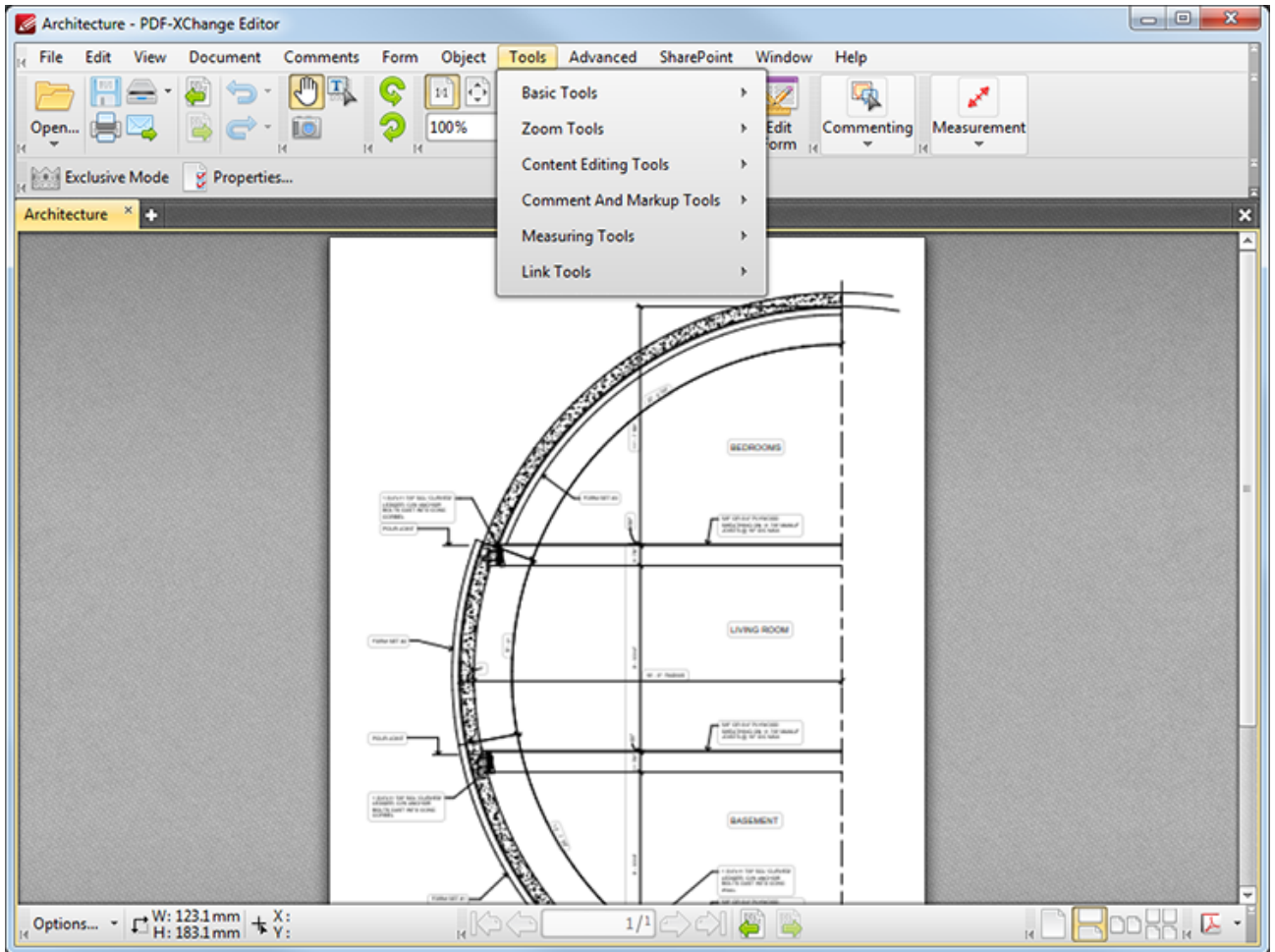
Figure 1. Tools Tab Submenu

- **Basic Tools** 634 - the **Hand Tool, Snapshot Tool** and **Select Text Tool**, which perform the most basic operations in the software.
- **Zoom Tools** 643 - the **Zoom Tool, Loupe Tool** and **Pan and Zoom Feature,** which assist in editing documents via zoom-related features.

- **Content Editing Tools** 653 - the **Edit Content Tool** and the **Add Text Tool**, which facilitate the editing of base content and the creation of document text.
- **Comment and Markup Tools** 659 - the **Edit Comments Tool,** nineteen tools that enable the creation of document comments/markups, and links to the editing palettes.
- **Measuring Tools** 723 - the **Distance, Perimeter and Area Tools,** which enable the measurement of document dimensions, and the **Calibrate Measurement** feature, which is used to calibrate scales to use in conjunction with tools.
- **Link Tools** 736 - the **Link Creation Tool,** which makes it possible to add dynamic links to documents.

6.7.1 **Basic Tools**

Basic Tools

Hover over **Basic Tools** to open the following submenu:
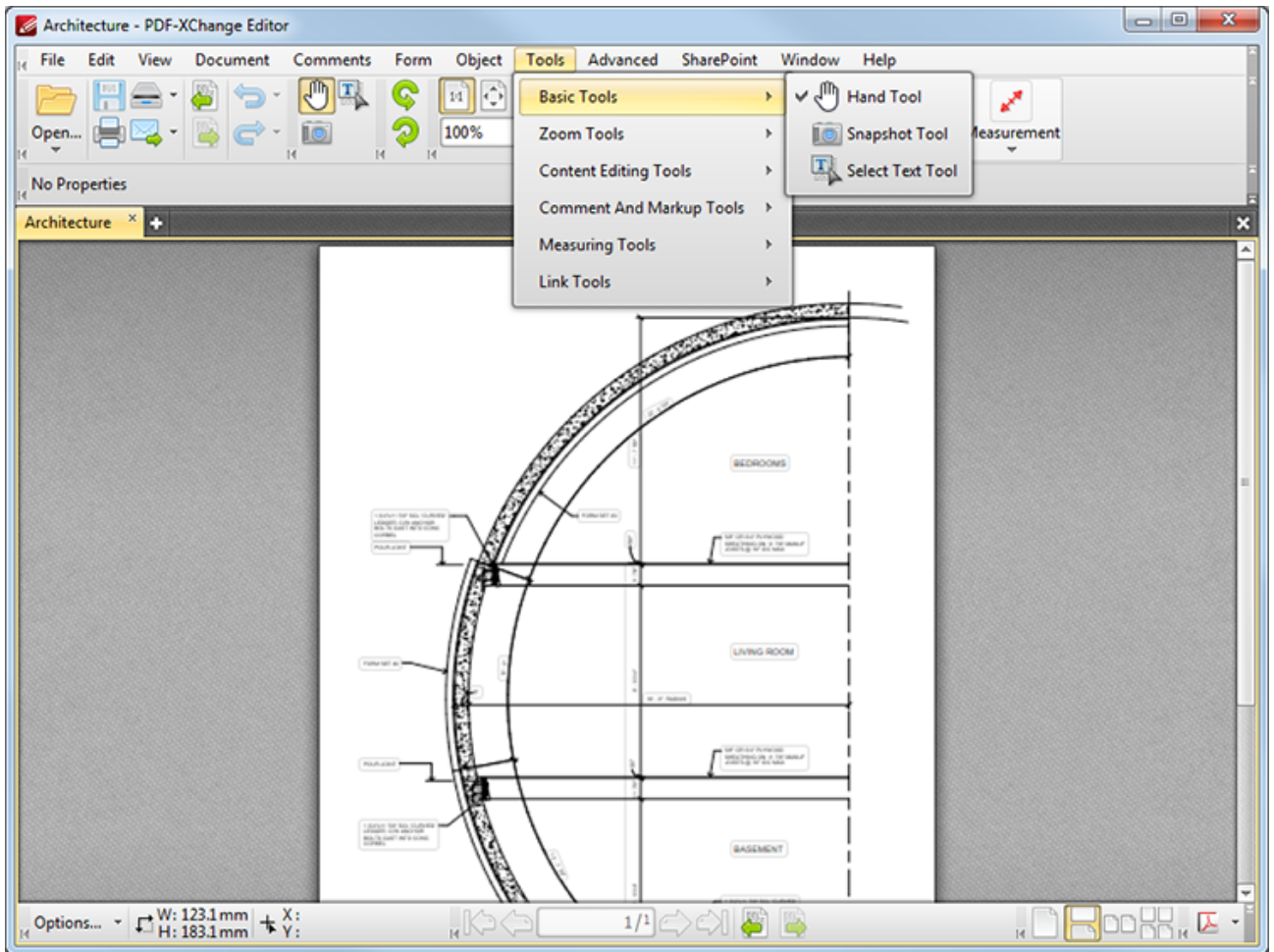
Figure 1. Tools Tab Submenu. Basic Tools

- The **Hand Tool** ⎣636⎦ is the default tool in **PDF-XChange Editor.** It is used to scroll through document pages.
- The **Snapshot Tool** ⎣271⎦ is used to create image files from documents/document sections.
- The **Select Text Tool** ⎣640⎦ is used to select and edit document text.

6.7.1.1   Hand Tool

Hand Tool

Click **Hand Tool** to enable this tool:
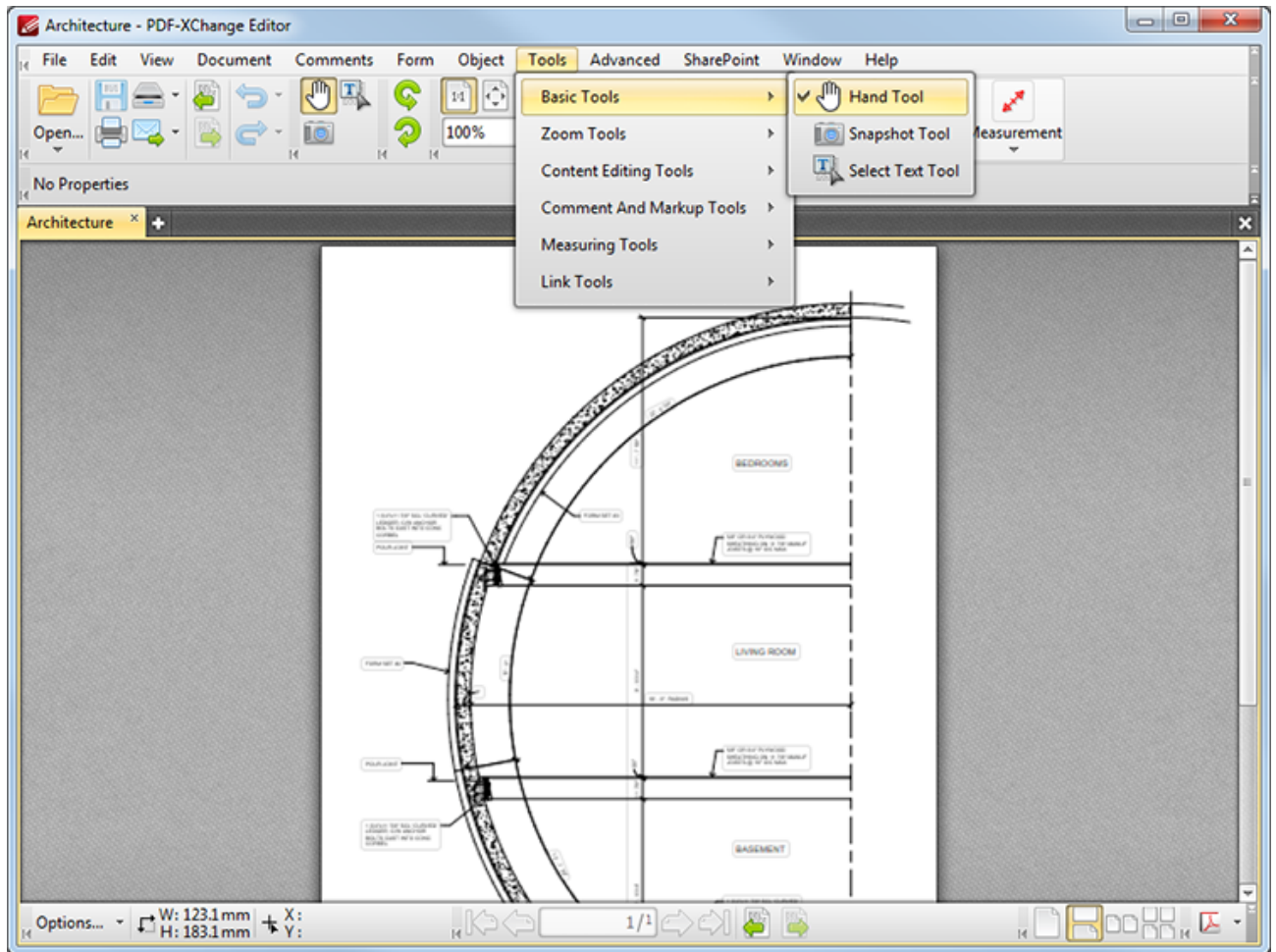
Figure 1. Basic Tools Submenu. Hand Tool

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 two options are available in the **Properties Toolbar:**[484]

- **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 standard manner.
- **Properties** opens the **Properties Pane** to view/edit the properties for the **Hand Tool.** See **here**[869] for information on tool properties.

6.7.1.2   Snapshot Tool

Snapshot Tool

Click **Snapshot Tool** to enable this tool:
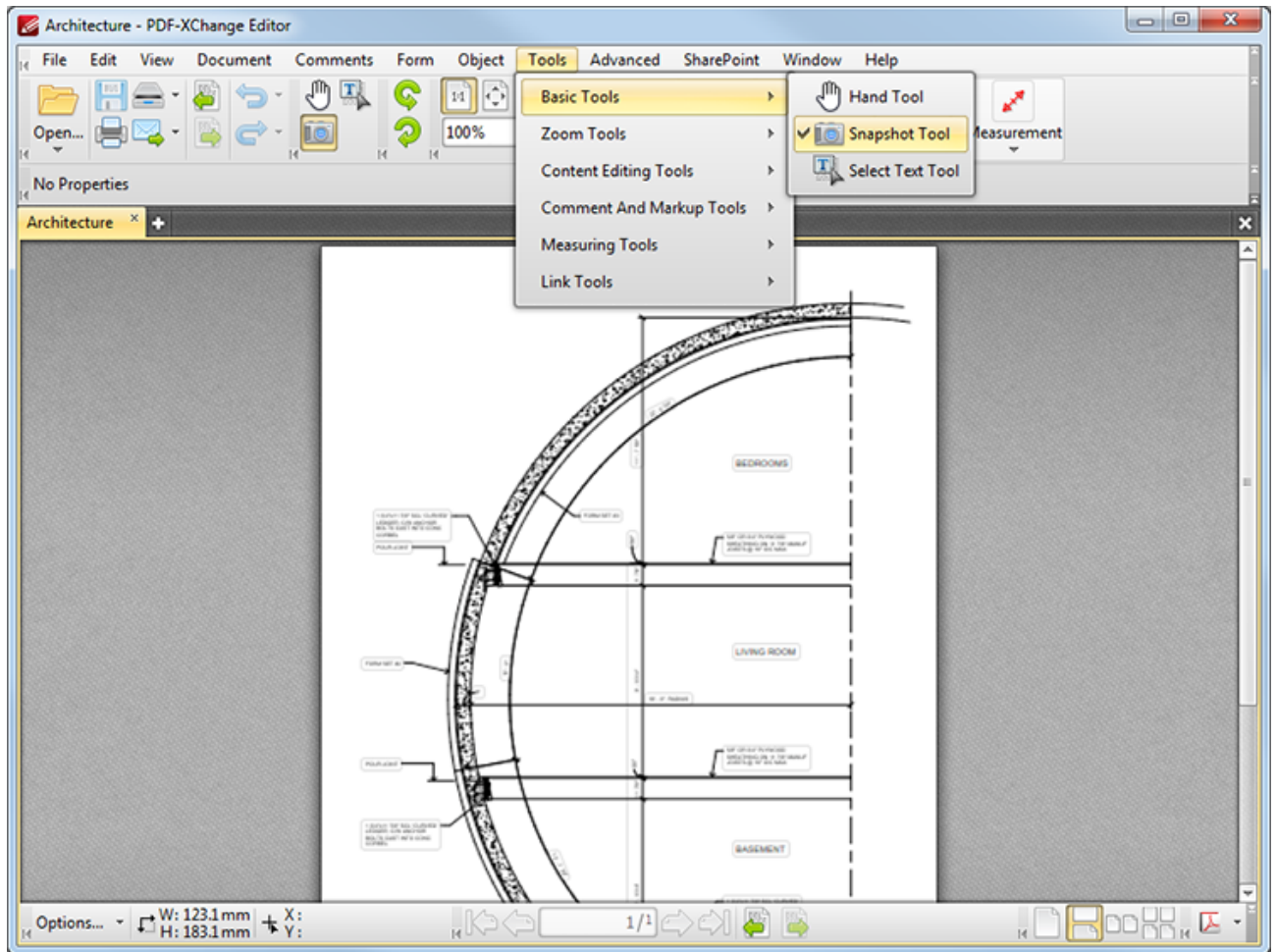
Figure 1. Basic Tools Submenu. Snapshot Tool

The **Snaphsot Tool** is used to take document snapshots. When it is enabled, click pages to take a screenshot. Alternatively, click and drag the pointer to select a custom page area. Release to take a snapshot. A bitmap copy of the selection will be pasted to the clipboard.

See **here** 107 for step-by-step instructions on how to print snapshots.

See **here** 271 for further settings regarding the **Snapshot Tool**.

6.7.1.3 **Select Text Tool**

Select Text Tool

Click **Select Text Tool** to enable this tool:
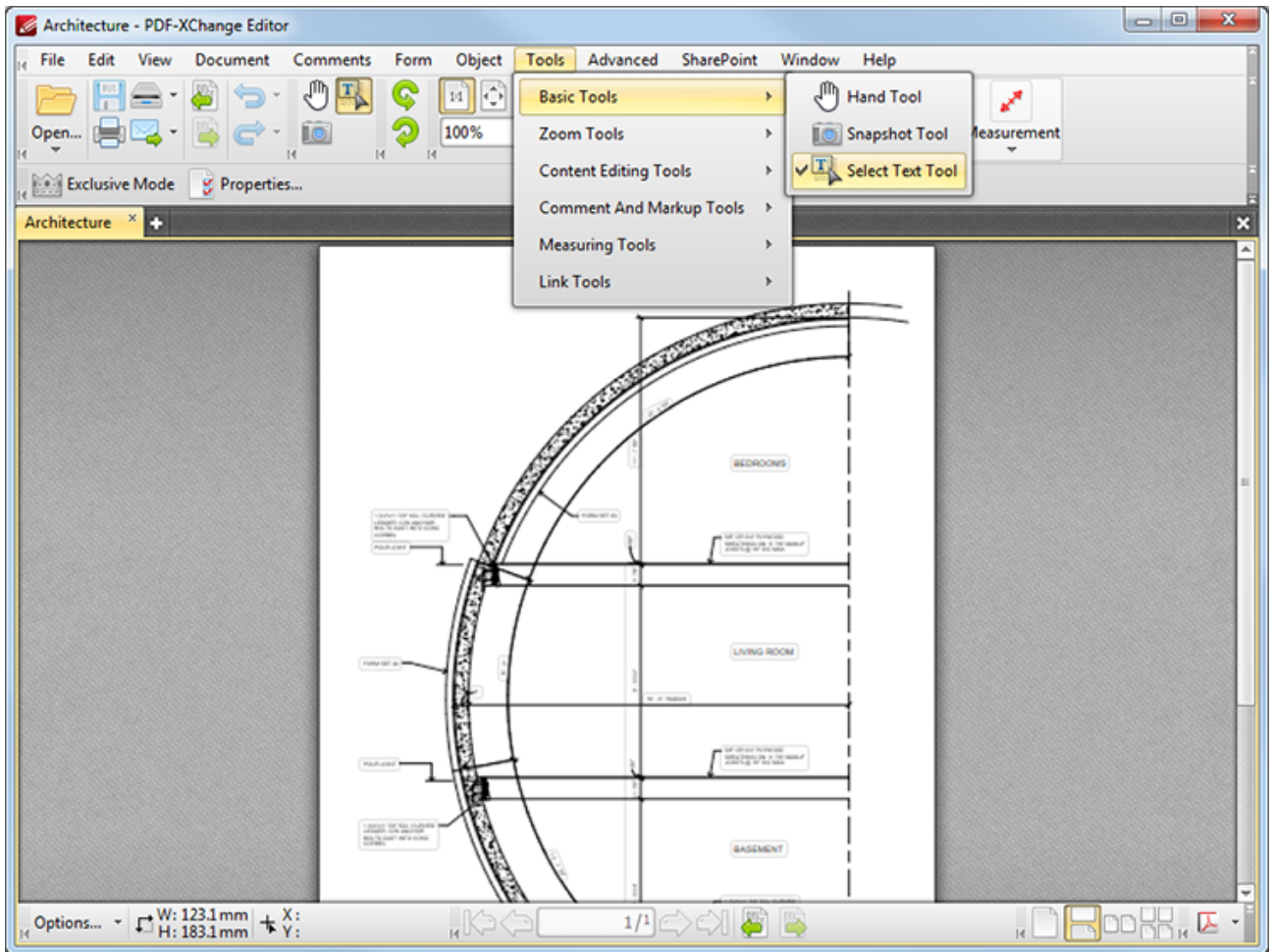
Figure 1. Basic Tools Submenu. Select Text Tool

The **Select Text Tool** is used to select and edit 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. Quadruple-click to select all text on the current page. Right-click selections to view editing options. The menu detailed in **(figure 2)** will be displayed:

Figure 2. Select Text Tool, Right-Click Options

The following options in *(figure 2)* relate to editing selected text:

- Click **Copy** to copy the selected text.
- Click **Copy as a Rich Text** to copy the selected text into Rich Text Format.
- Click **Highlight Text** to highlight the selected text.

- Click **Underline Text** to underline the selected text.
- Click **Crossout Text** to add a strikethrough to the selected text.
- Click **Add Bookmark** to create a bookmark from the selected text. See **here**⌐493⌐ for further information.
- Click **Internet Search by** to perform an internet search for the selected text. Google is the search engine selected in *(figure 2).* Hover the pointer over the **Internet Search by** option to select an alternative search engine.
- Click **Read Out Loud Selected Text** to activate the **Read Out Loud Feature**⌐861⌐ for the selected text.
- Click **Stop Reading** to halt the Read Out Loud Feature during operation.
- Click **Use Selected Text Style in Bookmark Generation** to launch the **Bookmark Generation Properties** dialog box. This makes it possible to create a bookmark using the content and style of selected text. See **here**⌐762⌐ for further details.
- The main properties of selected text are displayed in the **Properties Toolbar.**⌐484⌐ Click **Properties** in the **Properties Toolbar** to open the **Properties**⌐224⌐ pane and view further properties. Please note that it is not possible to edit properties using this tool as it is intended for selection only. The **Edit Content Tool**⌐655⌐ can be used to edit text and text properties.
- See **here**⌐809⌐ for an explanation of the options detailed in *(figure 2)* that are not available for the **Select Text Tool.**

Please note that when copying text from PDF documents to paste in applications/locations outside of **PDF-XChange Editor** (such as **Microsoft Word**) additional page breaks may appear. This is a recognized problem with PDF documents. The **Edit Content Tool**⌐653⌐ should be used instead of the **Select Text Tool** in order to avoid this issue. When the **Edit Content Tool** is enabled, select text and then press Ctrl+C to copy it.

When this tool is in operation two options are available in the **Properties Toolbar:**⌐484⌐

- **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 standard manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Select Text Tool.** See **here**⌐869⌐ for information on tool properties.

6.7.2   **Zoom Tools**

Zoom Tools

Hover over **Zoom Tools** to open the following submenu:
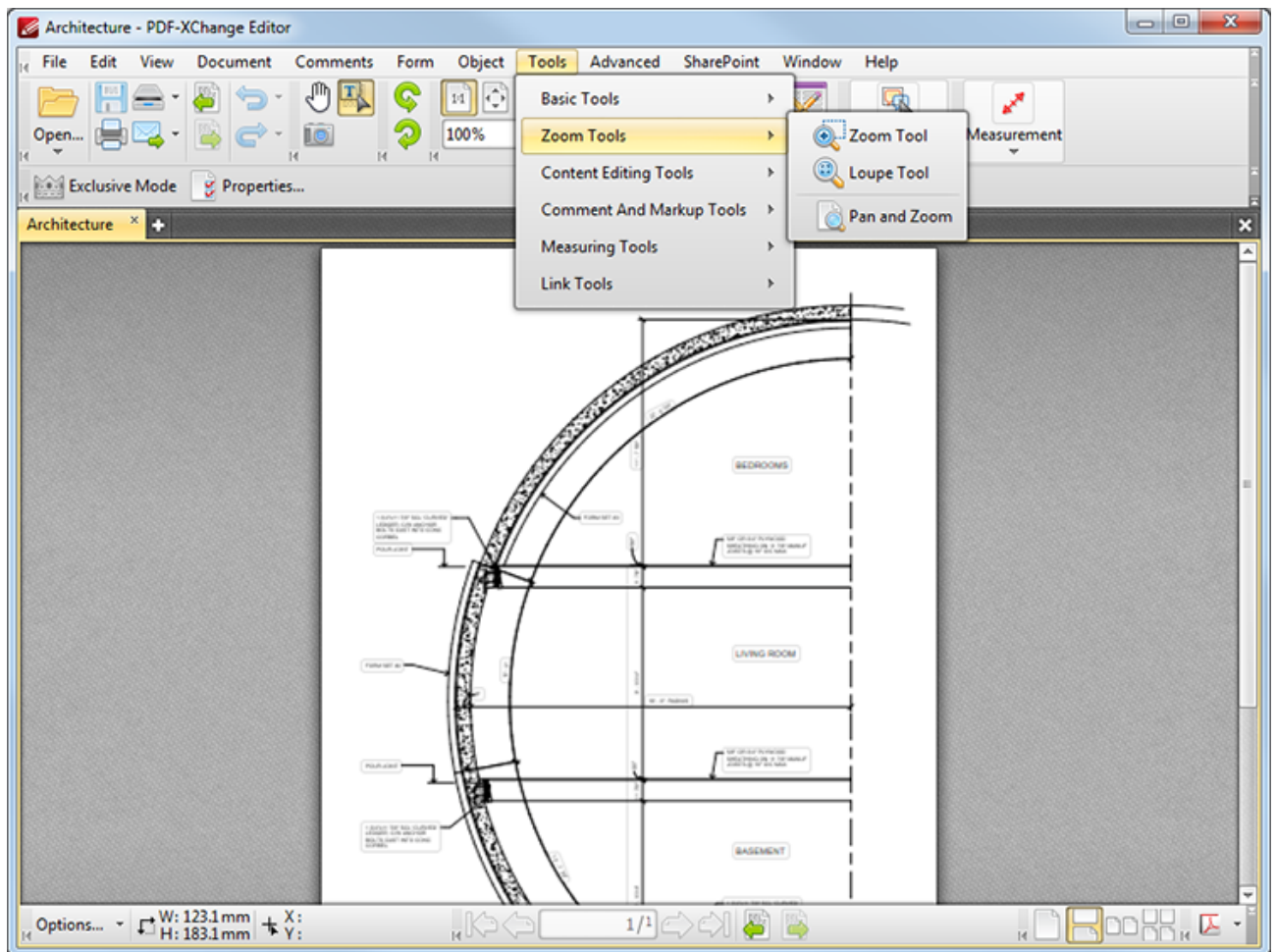
Figure 1. Tools Tab Submenu. Zoom Tools

These tools are zoom-related and assist in the viewing/editing process:

- The **Zoom Tool** 645 facilitates the use of zoom with documents.

- The **Loupe Tool** 647 enables the loupe pane, which facilitates the selection and manipulation of specific document areas as desired.
- The **Pan and Zoom** 650 feature launches the Pan and Zoom pane, which displays a miniature of the current document page to facilitate editing.

6.7.2.1 Zoom Tool

 Zoom Tool

Click **Zoom Tool** to enable this tool:
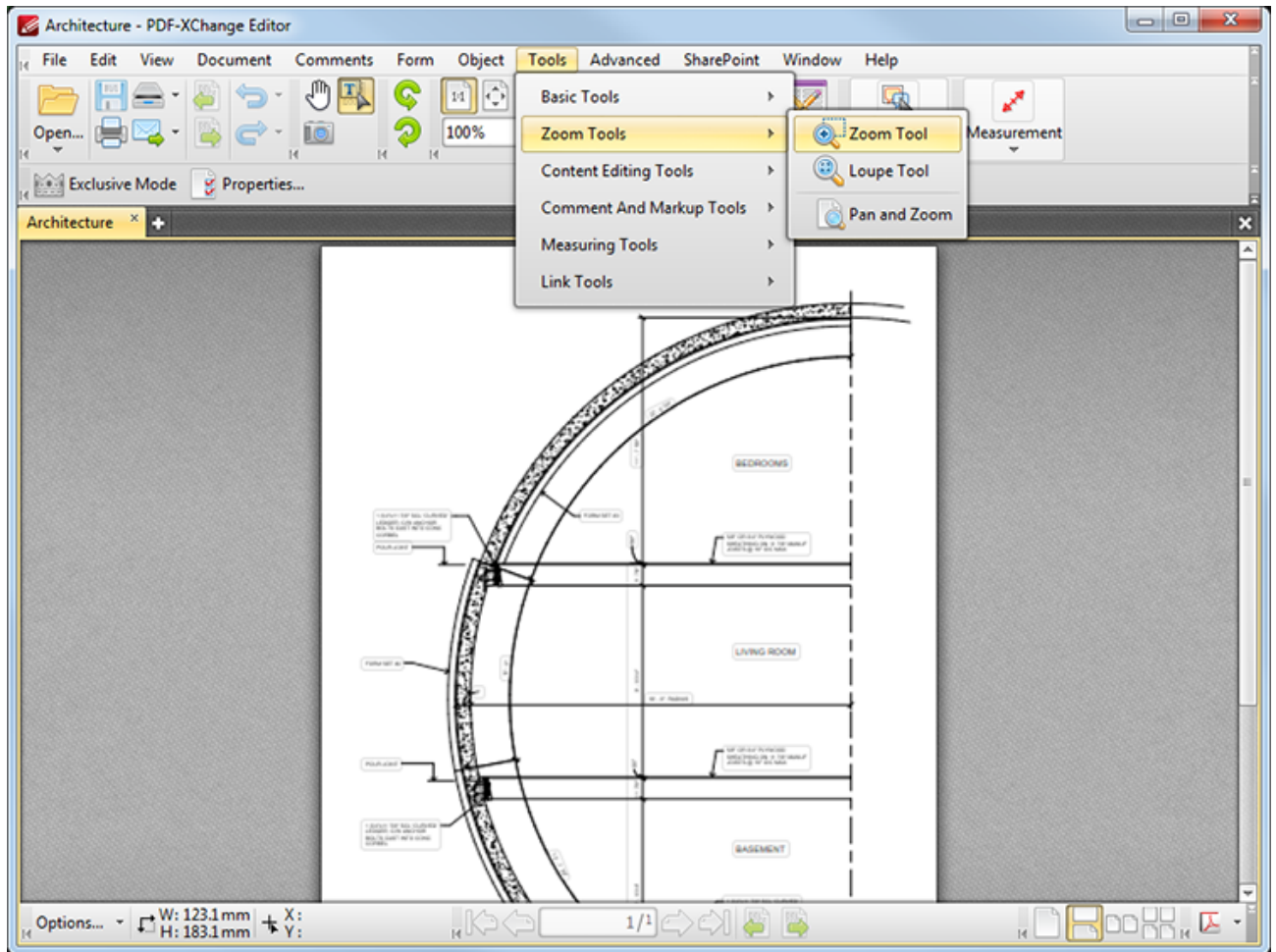
Figure 1. Tools Tab Submenu. Zoom Tool

The **Zoom 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 Tool** will move the current view to the area specified.

When this tool is in operation two options are available in the **Properties Toolbar:**484

- **Exclusive Mode** simplifies the process of using the **Zoom 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 standard manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Zoom Tool.** See **here**869 for information on tool properties.

6.7.2.2 Loupe Tool

Loupe Tool

Click **Loupe Tool** to enable this tool:
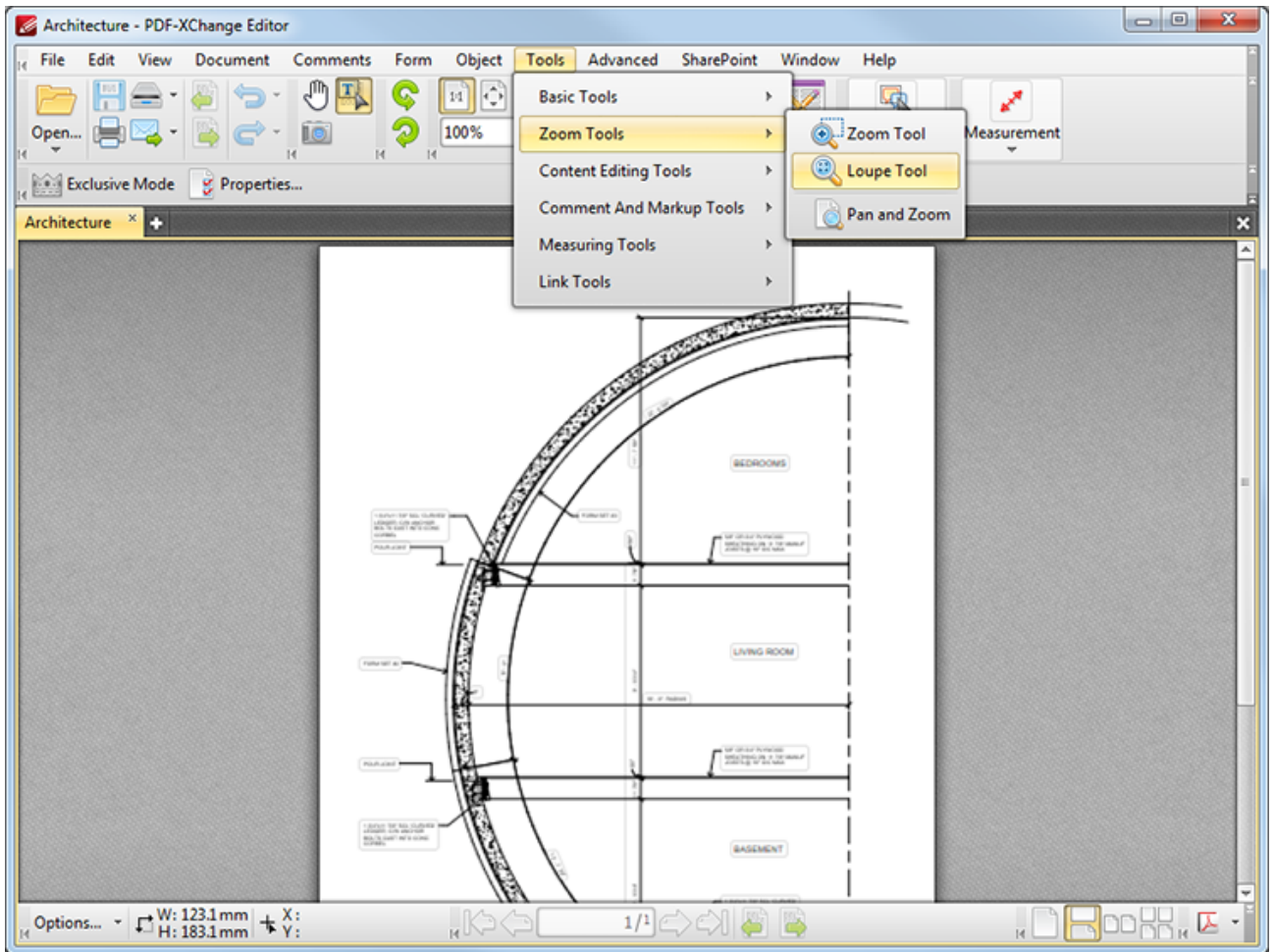
Figure 1. Tools Tab Submenu. Loupe Tool

The **Loupe Tool** is used to assist in the editing of PDF documents. Click to determine the contents of the Loupe pane. A rectangle will appear as detailed in *(figure 2).* The area that it contains is displayed in the Loupe pane:
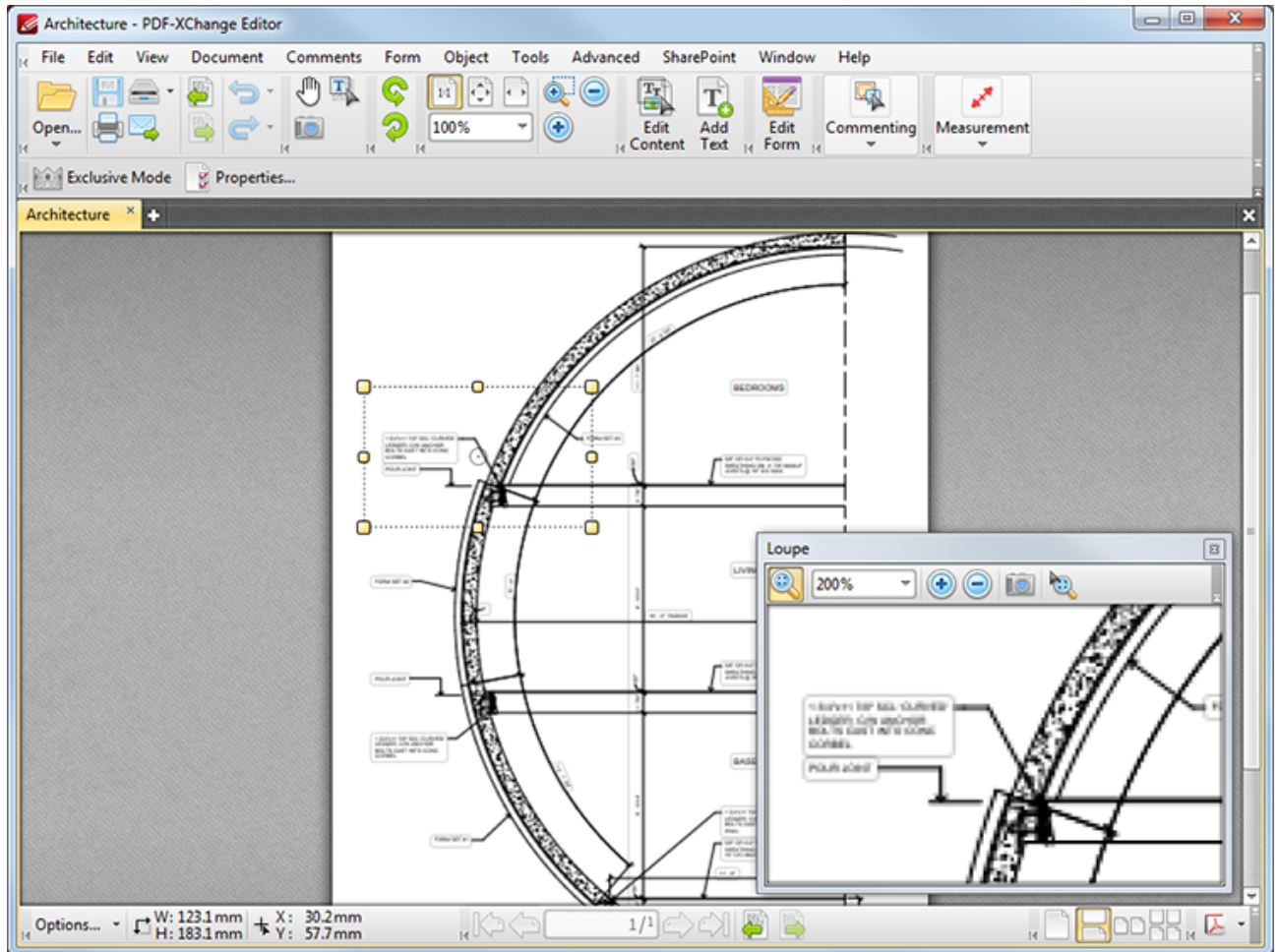
Figure 2. Loupe Tool Example

- Use the yellow control points to resize the Loupe rectangle. (Please note that proportions are constrained. Adjust the size of the Loupe pane to determine the proportions of the Loupe rectangle. Click and drag the edges of the Loupe pane to adjust its size).
- Click and drag the Loupe rectangle to reposition it. The Loupe pane will update accordingly.
- Use the number box in the Loupe pane toolbar, or the plus and minus icons, to determine the level of zoom displayed in the pane.-
- Use the camera icon in the Loupe pane toolbar to take a **snapshot** [271] of the current display. A bitmap copy of the selection will be pasted to the clipboard of the local computer.
- Use the track mouse icon in the Loupe pane toolbar to enable/disable the **Track Mouse** feature. When this feature is enabled the **Loupe Tool** will follow the pointer. (Please note that the size of the Loupe rectangle cannot be adjusted when the **Track Mouse** feature is in use).
- Click and drag the Loupe 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. Move the pointer onto any of these icons and release the mouse to add the Loupe pane as a toolbar at the selected location.

When the **Loupe Tool** is in operation two options are available in the **Properties Toolbar:** [484]

- **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 standard manner.
- **Properties** opens the **Properties** pane to view/edit the properties for the **Loupe Tool.** See [here] 869 for information on tool properties.

6.7.2.3 Pan and Zoom

 Pan and Zoom

Click **Pan and Zoom** to enable the **Pan and Zoom** pane:
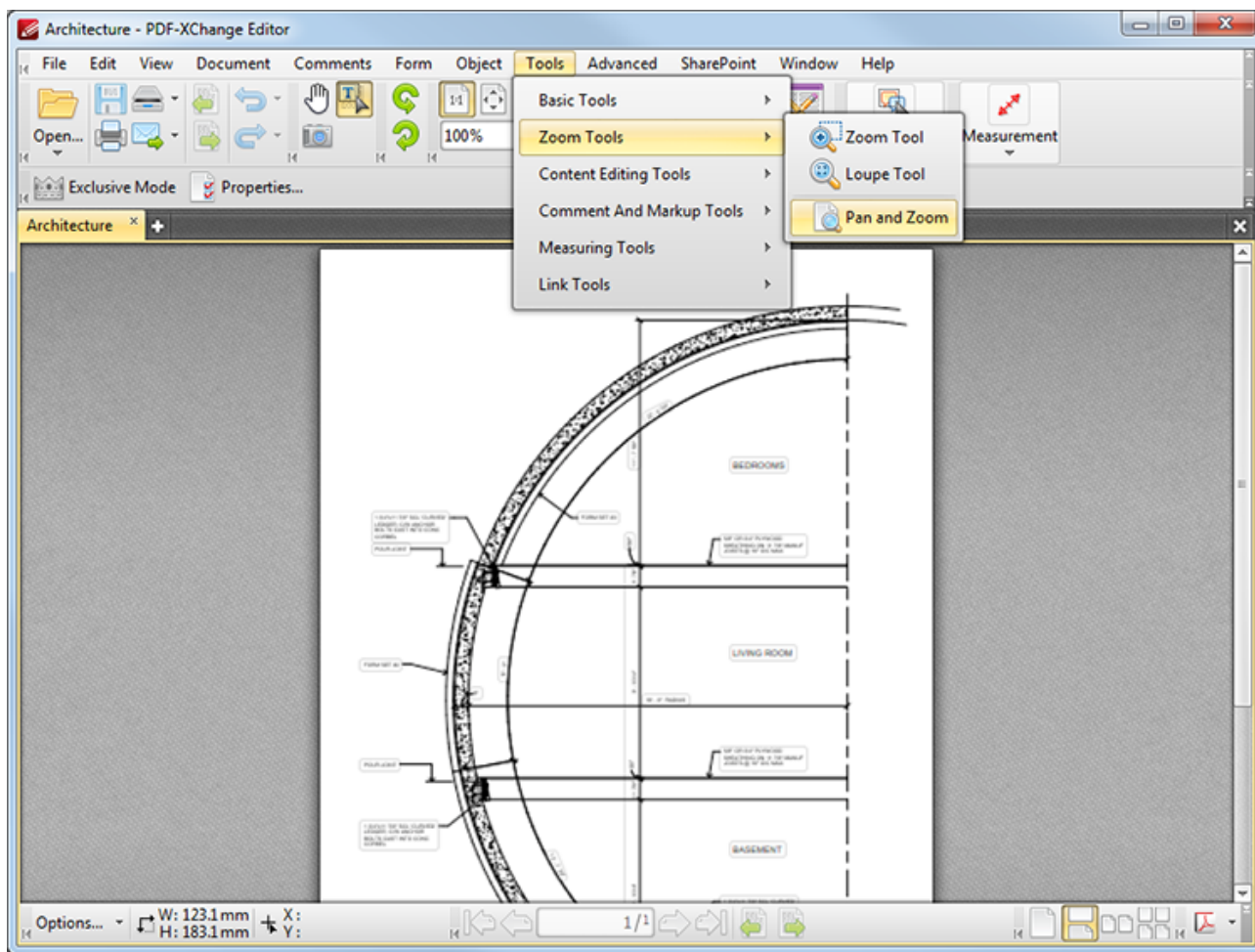
Figure 1. Pan and Zoom Pane Location

This pane facilitates simple and efficient viewing of zoomed documents:
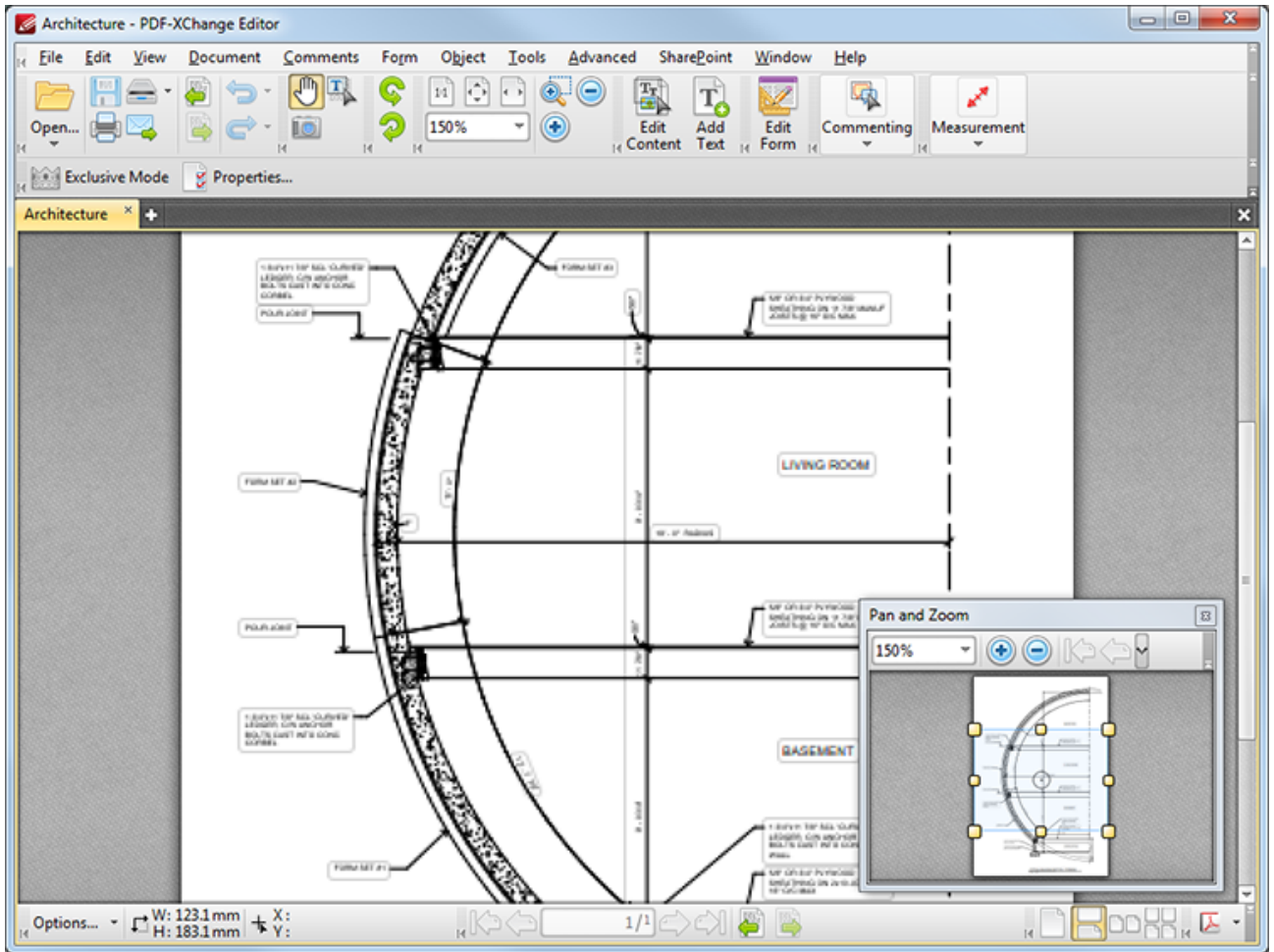
Figure 2. Pan and Zoom Pane

- The blue rectangle determines 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 custom zoom percentage in the number box.
- Click and drag the rectangle in the Pan and Zoom pane to adjust the current view in the main window.
- Use the arrow icons in the Pan and Zoom toolbar to move between document pages.
- Use the camera icon to take a **snapshot** [271] of the current view in the Pan and Zoom pane. A bitmap copy of the selection will be pasted to the clipboard of the local computer.
- 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. Move the pointer onto any of these icons and release the mouse to add the Pan and Zoom pane as a toolbar at the selected location.

When the **Pan and Zoom** feature is in operation two options are available in the **Properties Toolbar:** [484]

- **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** pane to view/edit the properties for the **Pan and Zoom** feature**.** See **here** 869 for information on tool properties.

6.7.3   Content Editing Tools

Content Editing Tools

Hover over **Content Editing Tools** to open the following submenu:
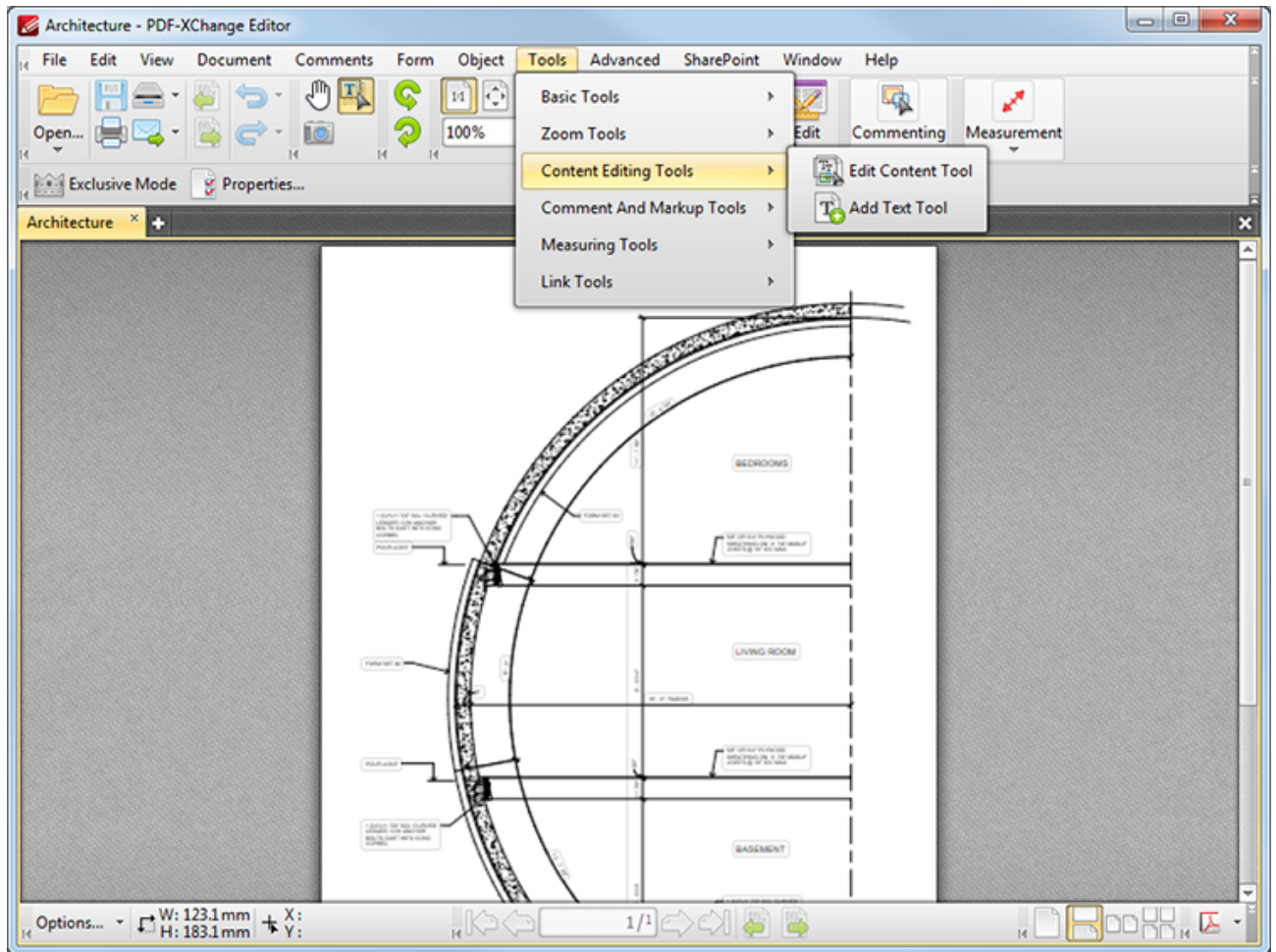
Figure 1. Tools Tab Submenu. Content Editing Tools

The content editing tools are used to edit the base content of documents:

- The **Edit Content Tool** ⌐655⌐ is used to edit existing content.
- The **Add Text Tool** ⌐656⌐ is used to add text to the base content layer.

6.7.3.1 Edit Content Tool

Edit Content Tool

Click **Edit Content Tool** to edit the base content of documents:
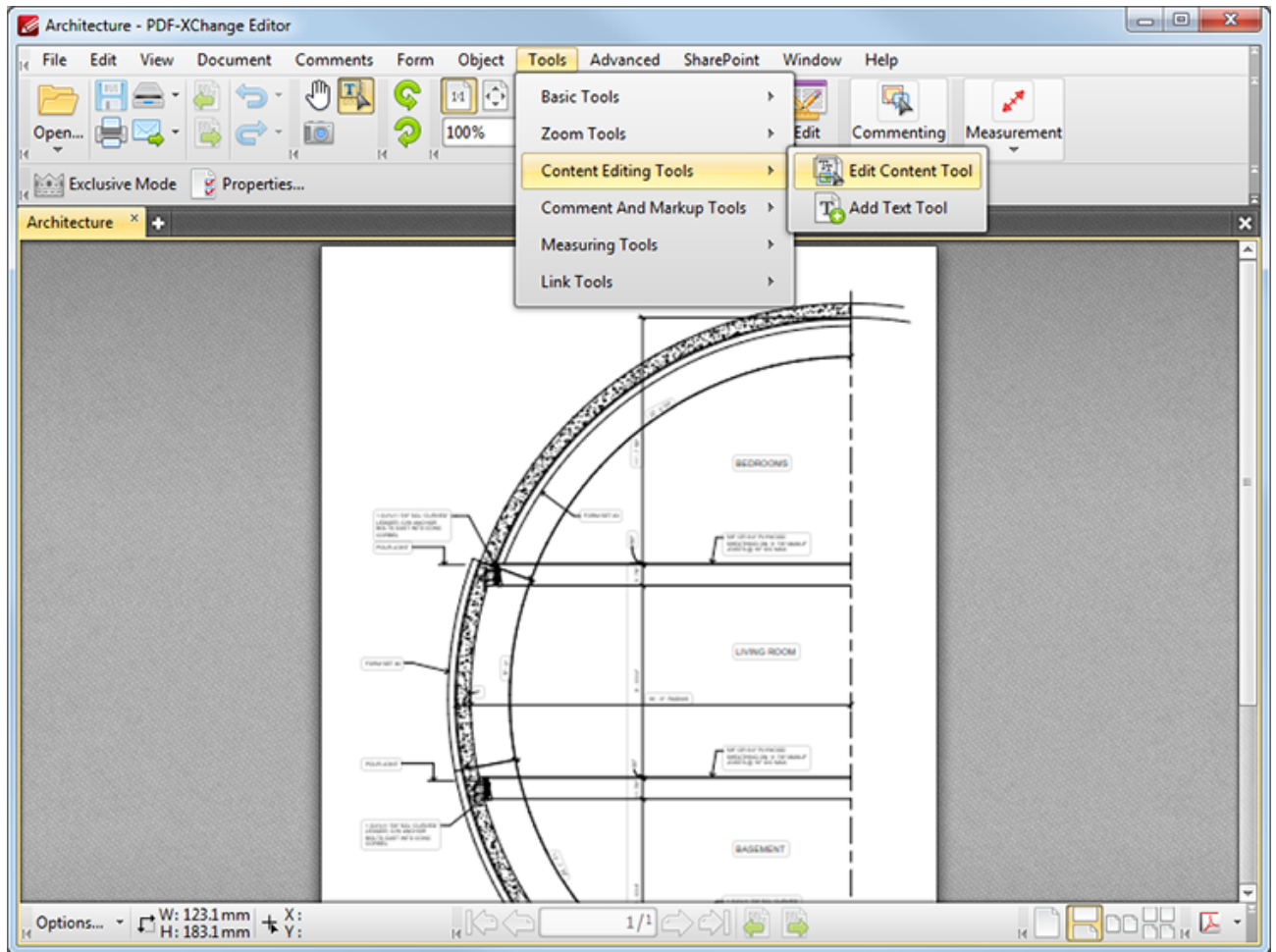
Figure 1. Tools Tab Submenu. Edit Content Tool

The operational instructions for this tool are detailed **here.** 808

6.7.3.2 Add Text Tool

 Add Text Tool

Click **Add Text Tool** to add text to the base content layer of documents:
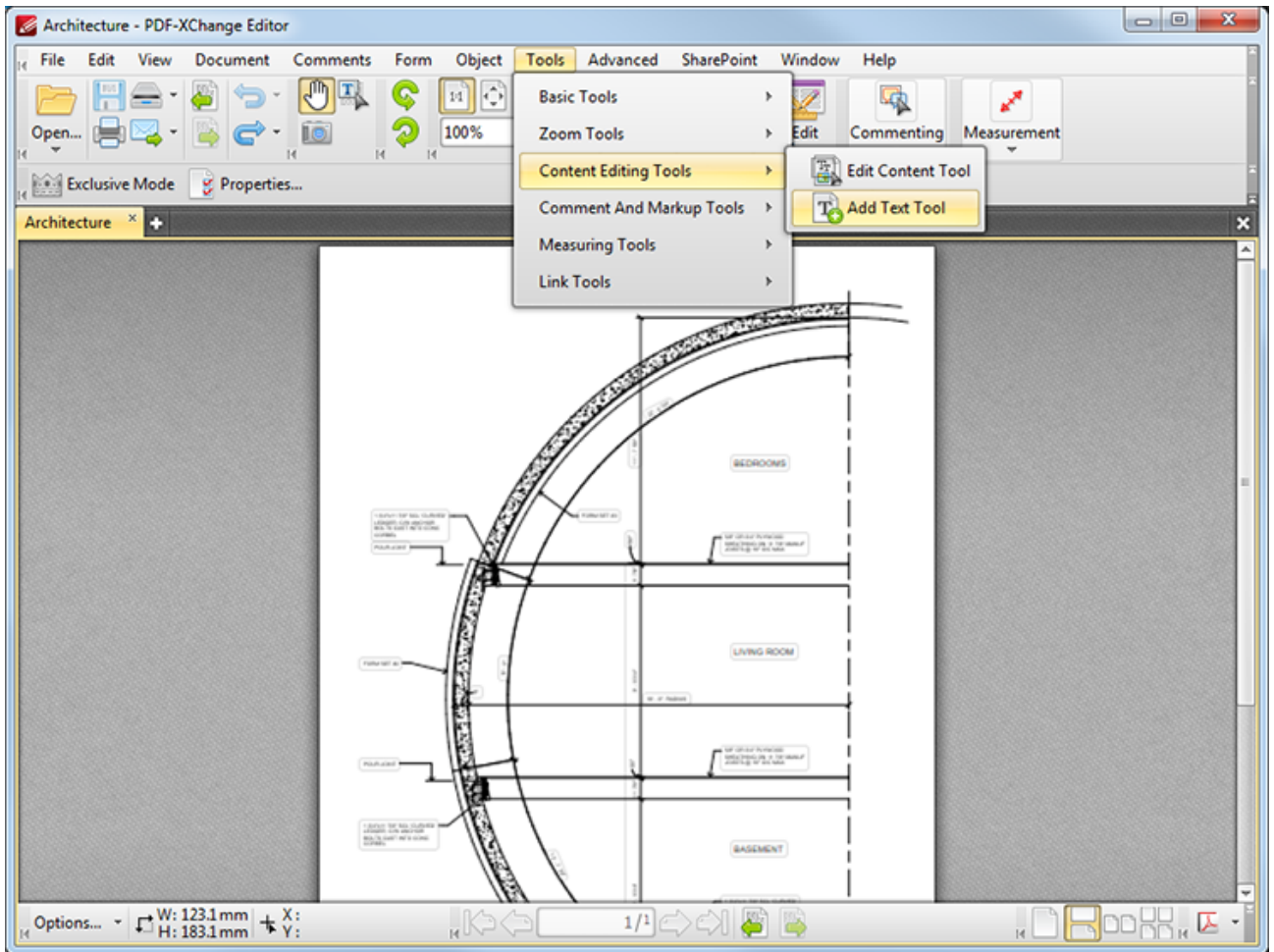
Figure 1. Tools Tab Submenu. Add Text Tool

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. A sample text box is displayed in **(figure 2).** (Please note that it is not possible to add text to areas of documents that **PDF-XChange Editor** already recognizes as text-based).
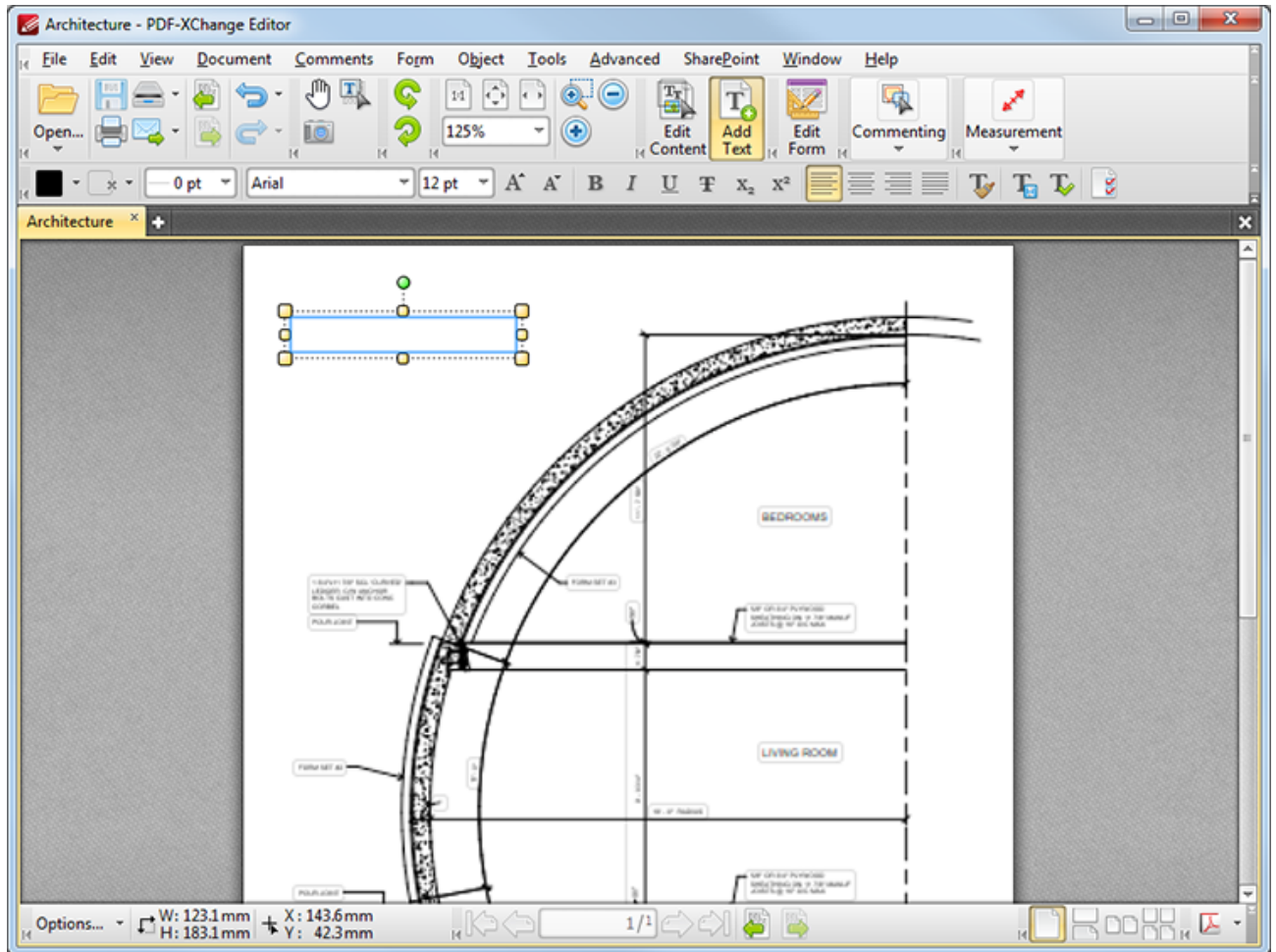
Figure 2. Add Text Tool Example

- 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).
- Click and drag the green control point at the top to rotate text boxes. Hold down Shift to rotate at increments of fifteen degrees.
- Use the editing aids detailed **here** 525 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** 484 can be used to adjust the text style. See **here** 863 for a list of available options.
- Right-click completed text boxes for further options. See **here** 865 for an explanation of these options.

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** 810 for information on editing text boxes.

6.7.4   Comment And Markup Tools

Comment And Markup Tools

Hover over **Comment And Markup Tools** to open the following submenu:
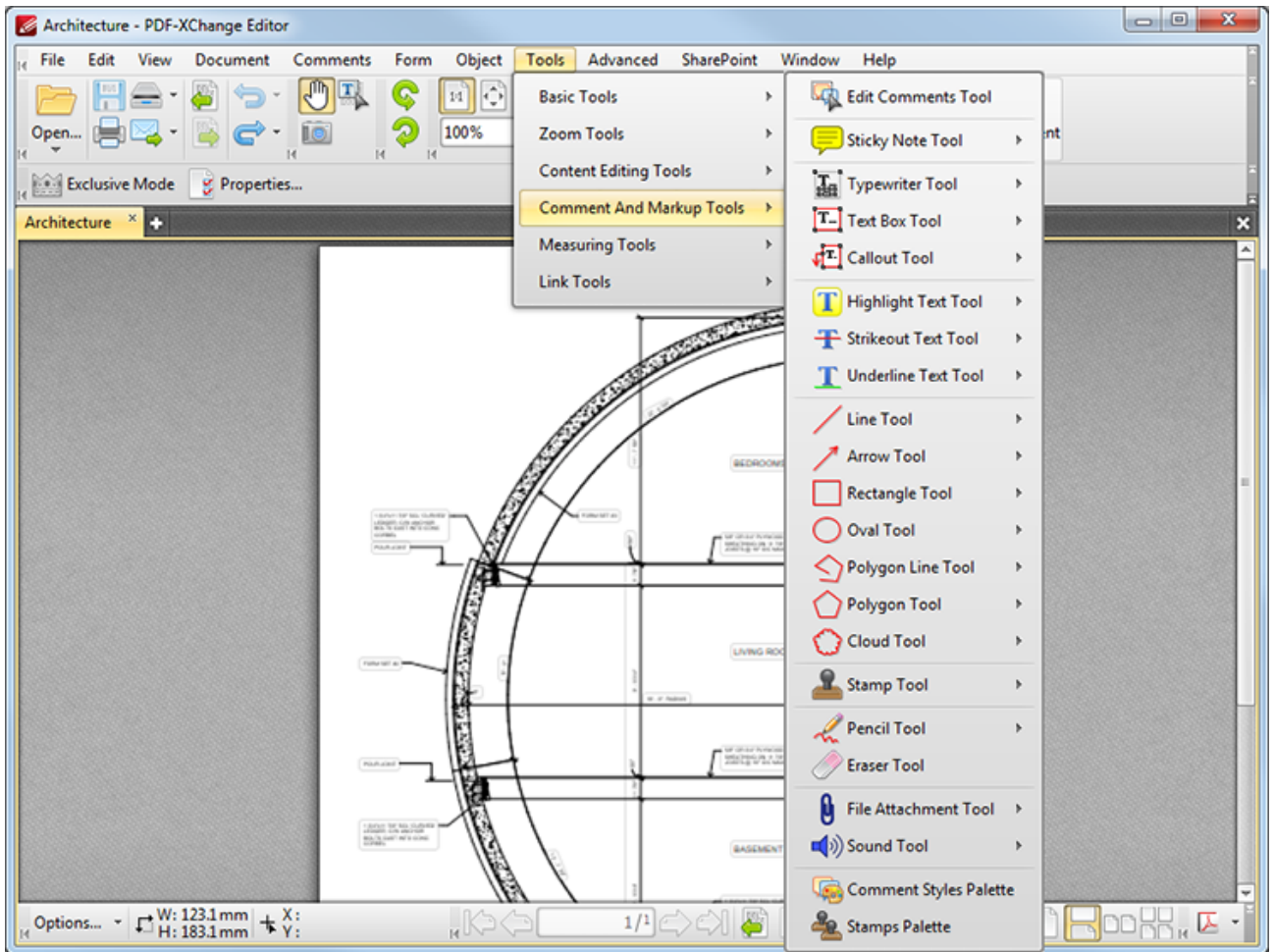
Figure 1. Comment and Markup Tools Submenu

- These tools are used to mark up, comment and/or annotate documents.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.

- See the **Annotations Guide** [49] for instructions about enabling and using comment and markup tools.
- All comment and markup tools are detailed below:

  - **Edit Comments Tool** [653]
  - **Sticky Note Tool** [664]
  - **Typewriter Tool** [667]
  - **Text Box Tool** [670]
  - **Callout Tool** [673]
  - **Highlight Text Tool** [677]
  - **Strikeout Text Tool** [680]
  - **Underline Text Tool** [683]
  - **Line Tool** [686]
  - **Arrow Tool** [686]
  - **Rectangle Tool** [689]
  - **Oval Tool** [689]
  - **Polygon Line Tool** [689]
  - **Polygon Tool** [689]
  - **Cloud Tool** [689]
  - **Stamp Tool** [704]
  - **Pencil Tool** [689]
  - **Eraser Tool** [689]
  - **File Attachment Tool** [717]
  - **Sound Tool** [720]
  - **Comment Styles Palette** [625]
  - **Stamps Palette** [706]

6.7.4.1   Edit Comments Tool

 Edit Comments Tool

Click **Edit Comments Tool** to edit existing comments/annotations:
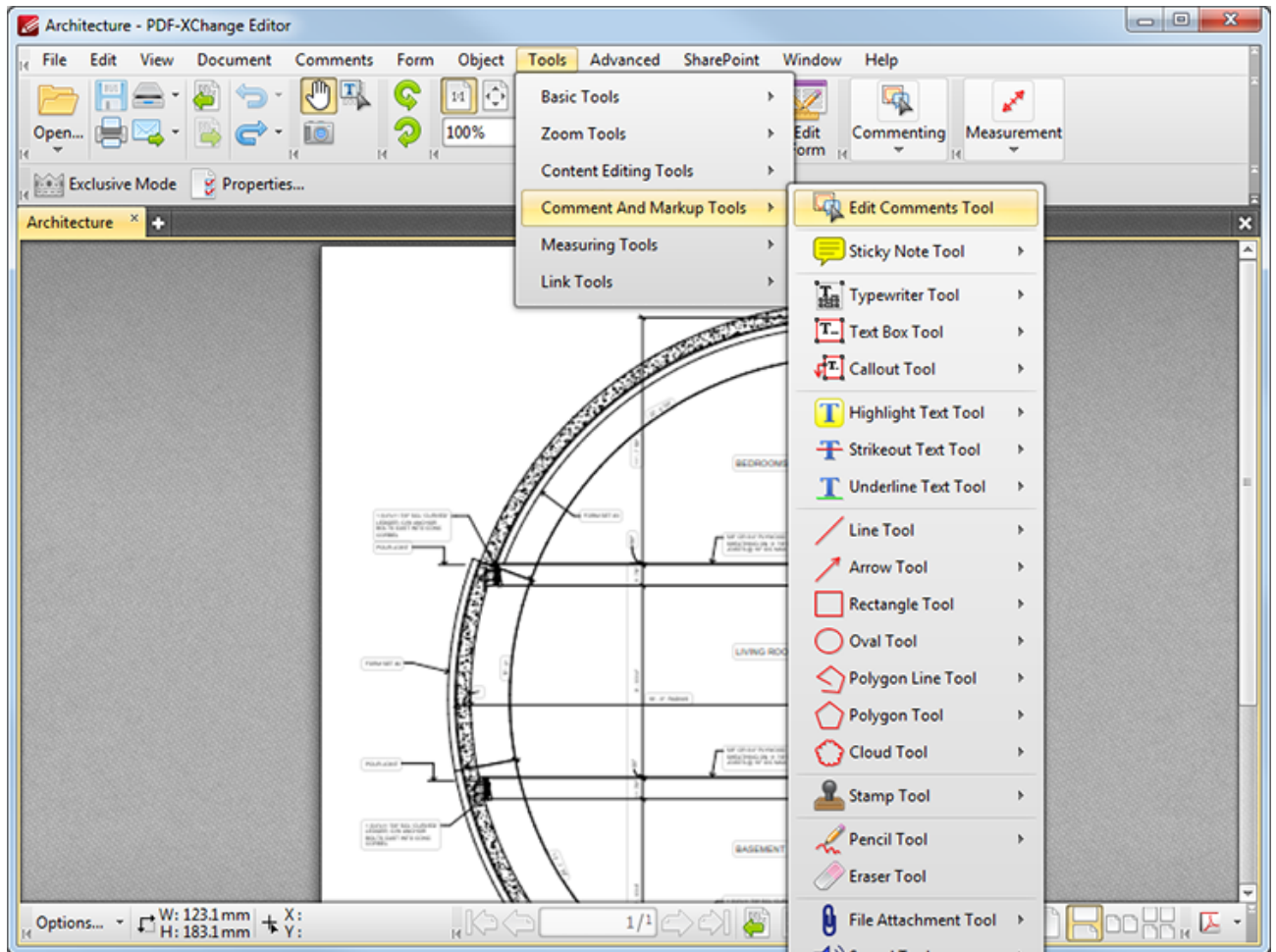
Figure 1. Tools Tab Submenu. Edit Comments Tool

Click comments to select them, or click and drag to select multiple comments:
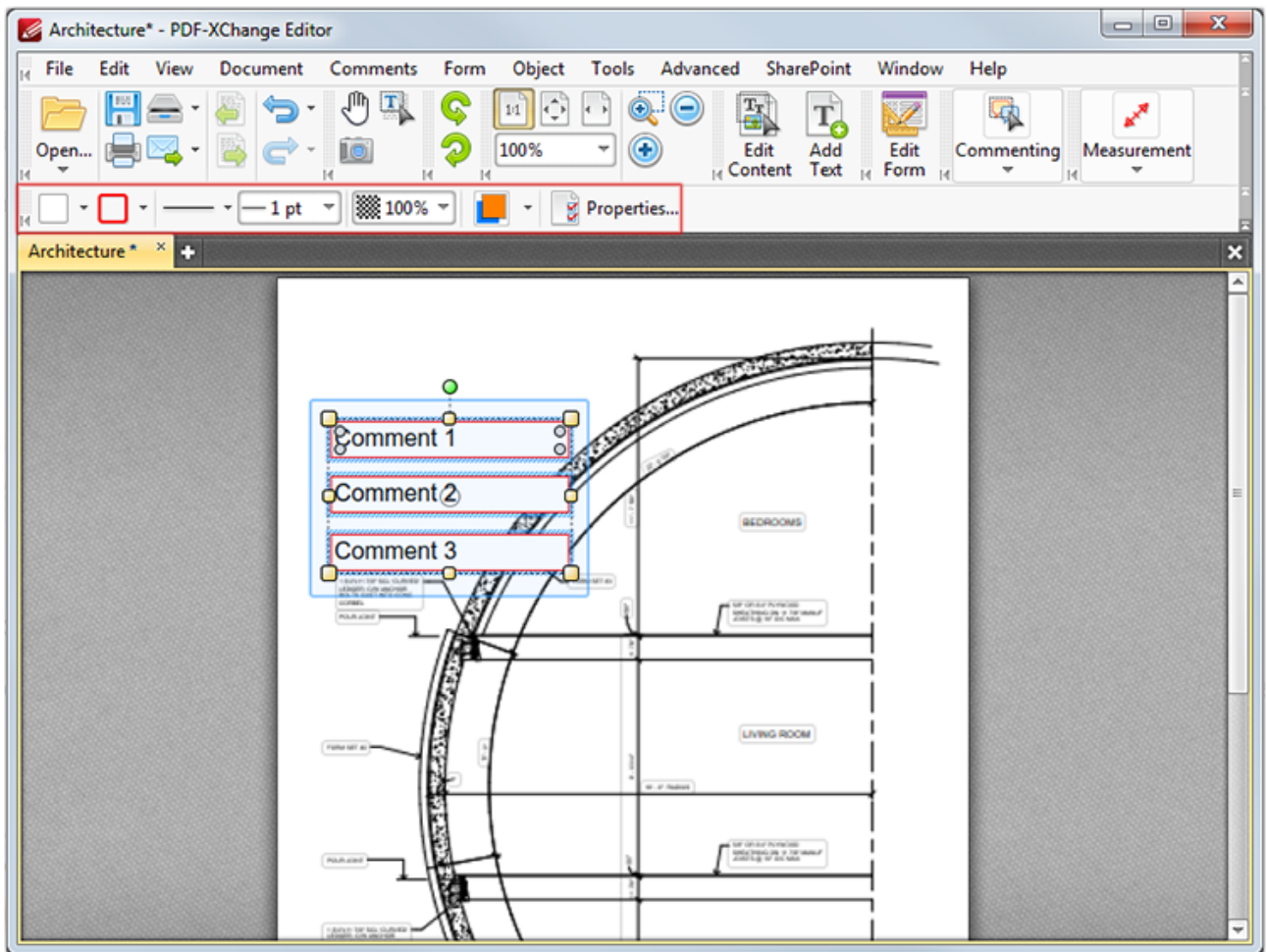
Figure 2. Edit Comments Tool, Group Select

- 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** 525 to assist in the precise placement of document content.
- The main properties of selected comments are detailed in the **Properties Toolbar** 484 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.
- Right-click comments to enable further options. See **here** 865 for an explanation of these options.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- Please note that when **Customized Comment Styles** 625 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** 810 for information on editing text boxes.

6.7.4.2 Sticky Note Tool

Sticky Note Tool

Click **Sticky Note Tool** to add interactive sticky note comments to documents:
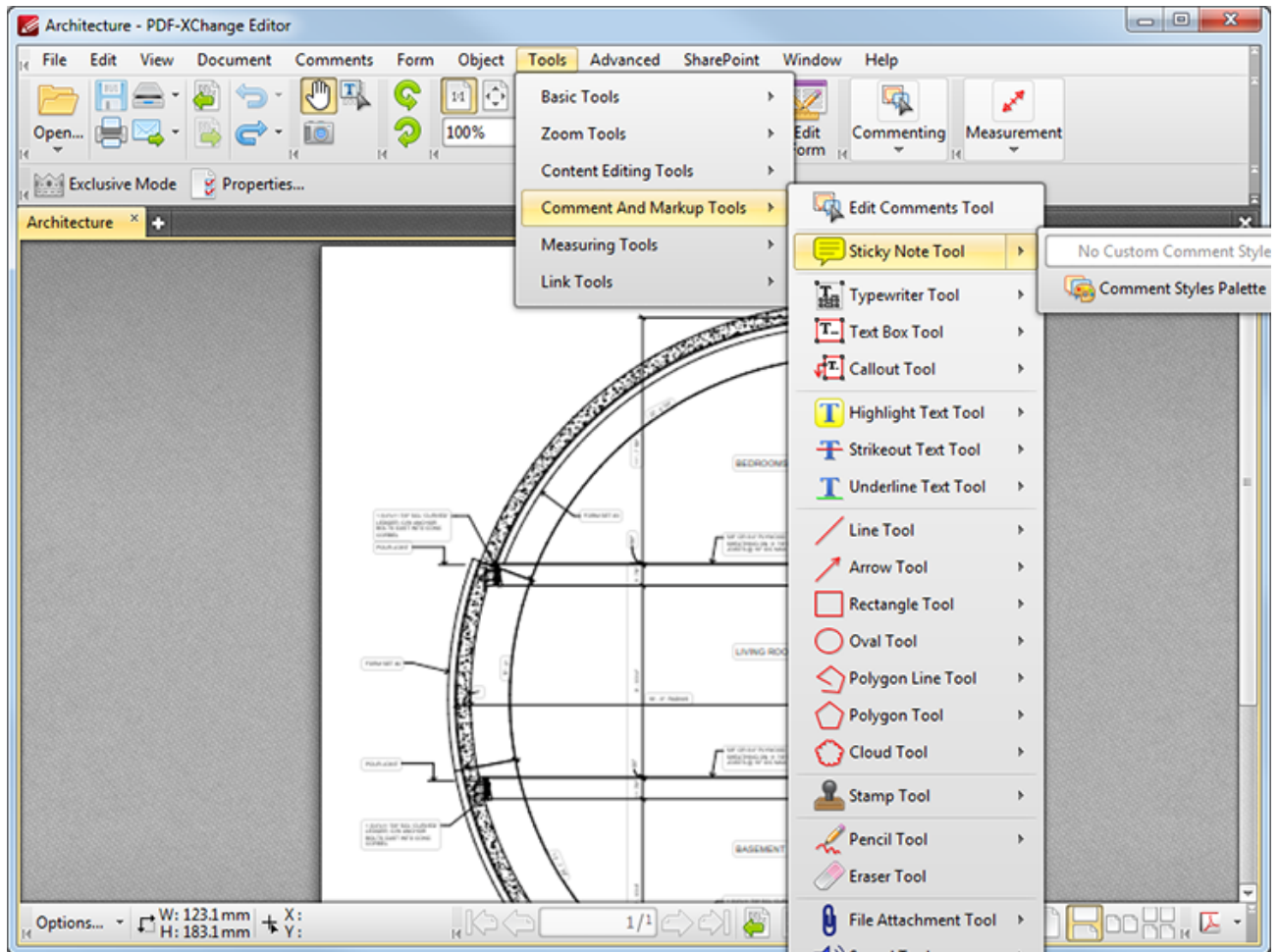
Figure 1. Tools Tab Submenu. Sticky Note Tool

When the **Sticky Note Tool** is selected, click to add sticky notes:
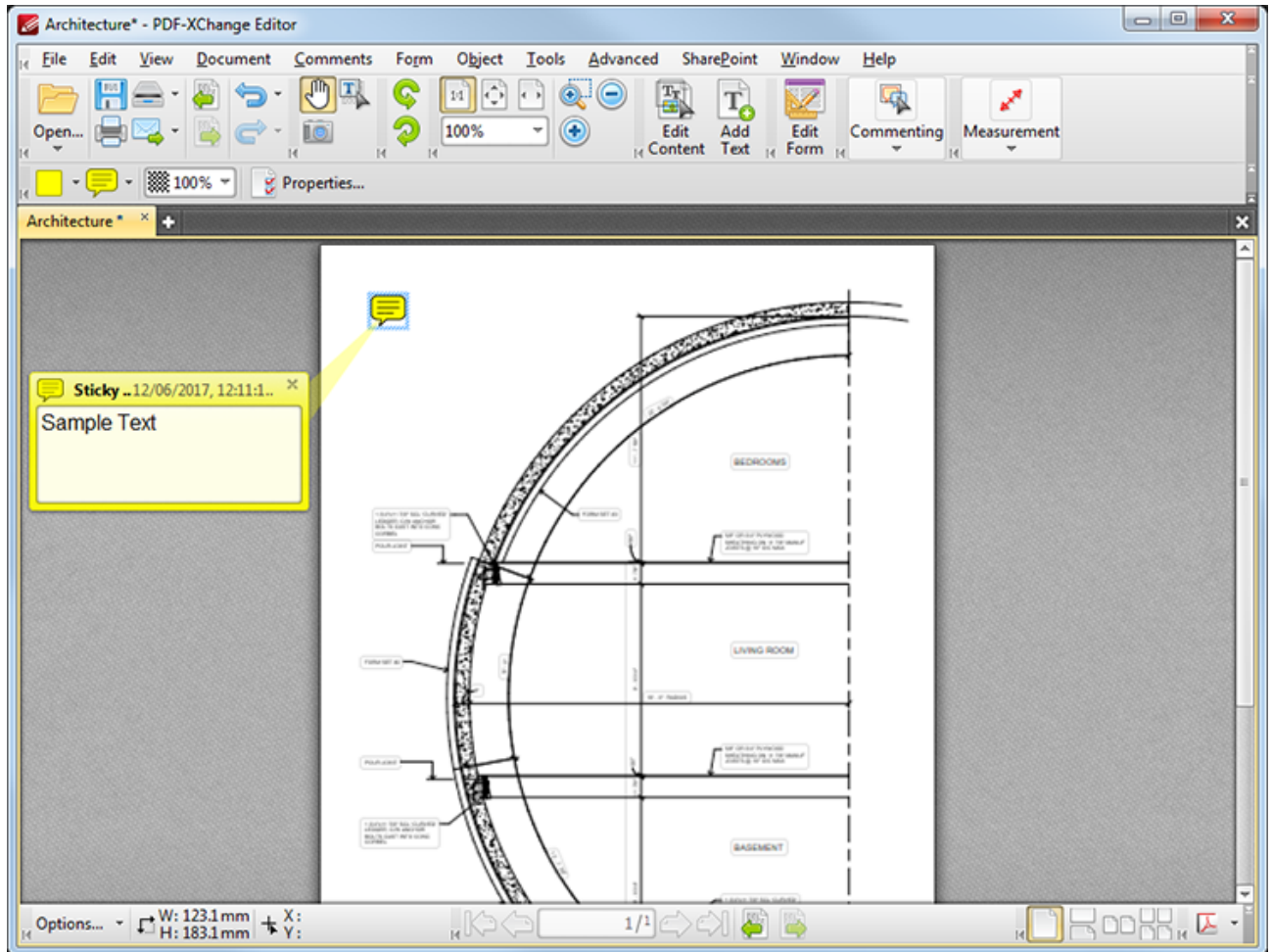
Figure 2. Sticky Note Tool Example

- 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** ⌐484⌐ when text is being entered. See **here** ⌐863⌐ for an explanation of these options. Right-click when entering/editing text to launch the text editing options menu. These options are explained **here.** ⌐810⌐
- Use the arrow keys to reposition sticky notes.
- Right-click sticky notes for further options. See **here** ⌐865⌐ for an explanation of these options.
- Sticky note options are enabled in the **Properties Toolbar** ⌐484⌐ 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 standard manner.

- Click **Properties** to view/edit further sticky note properties. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** 625 can be used to save customized sticky note styles for subsequent use. Right-click the **Sticky Note** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.3   Typewriter Tool

 Typewriter Tool

Click **Typewriter Tool** to add interactive, typewriter-style text comments to documents:
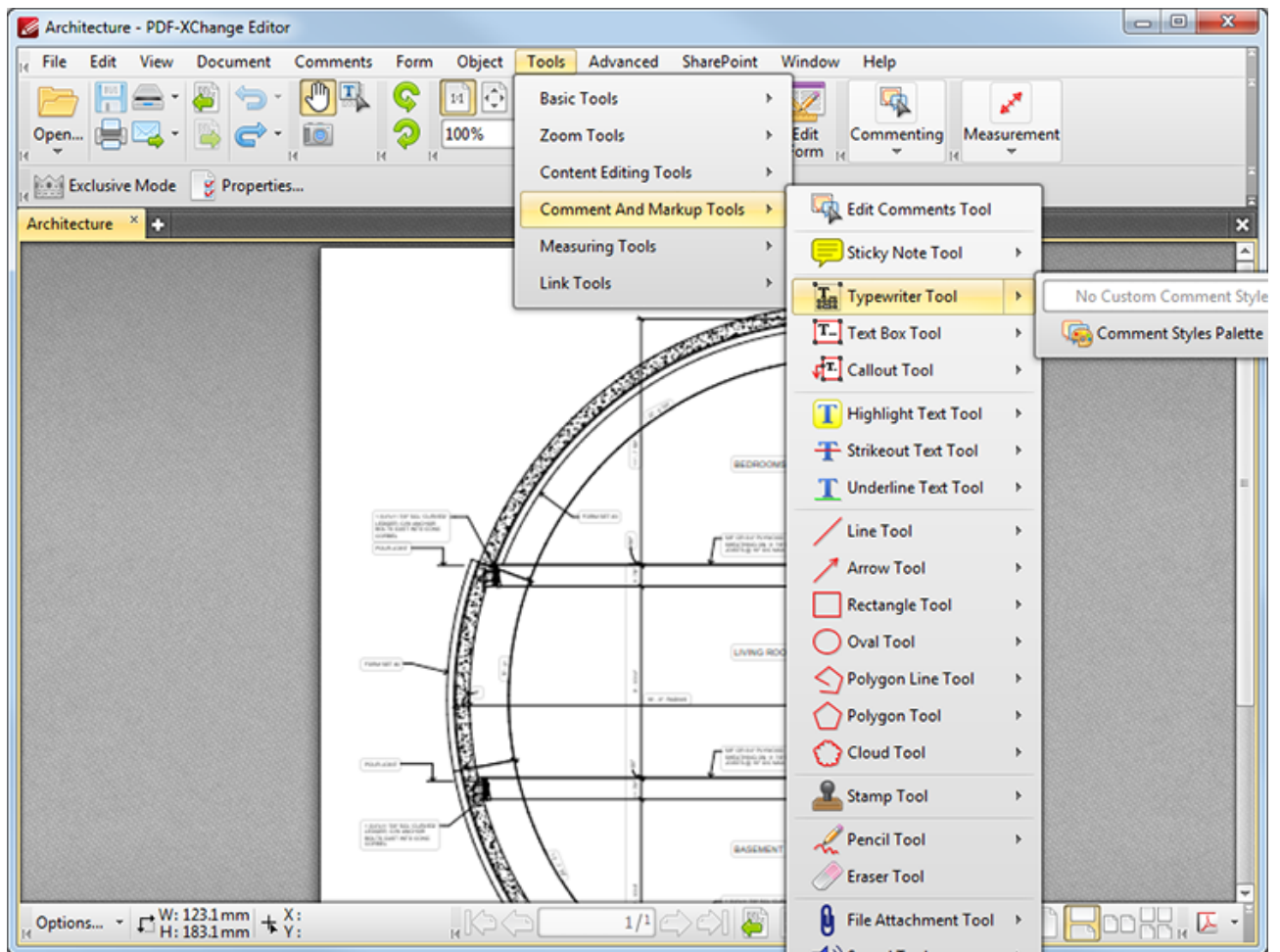
Figure 1. Tools Tab Submenu. Typewriter Tool

When the **Typewriter Tool** is selected, click to add typewriter notes:
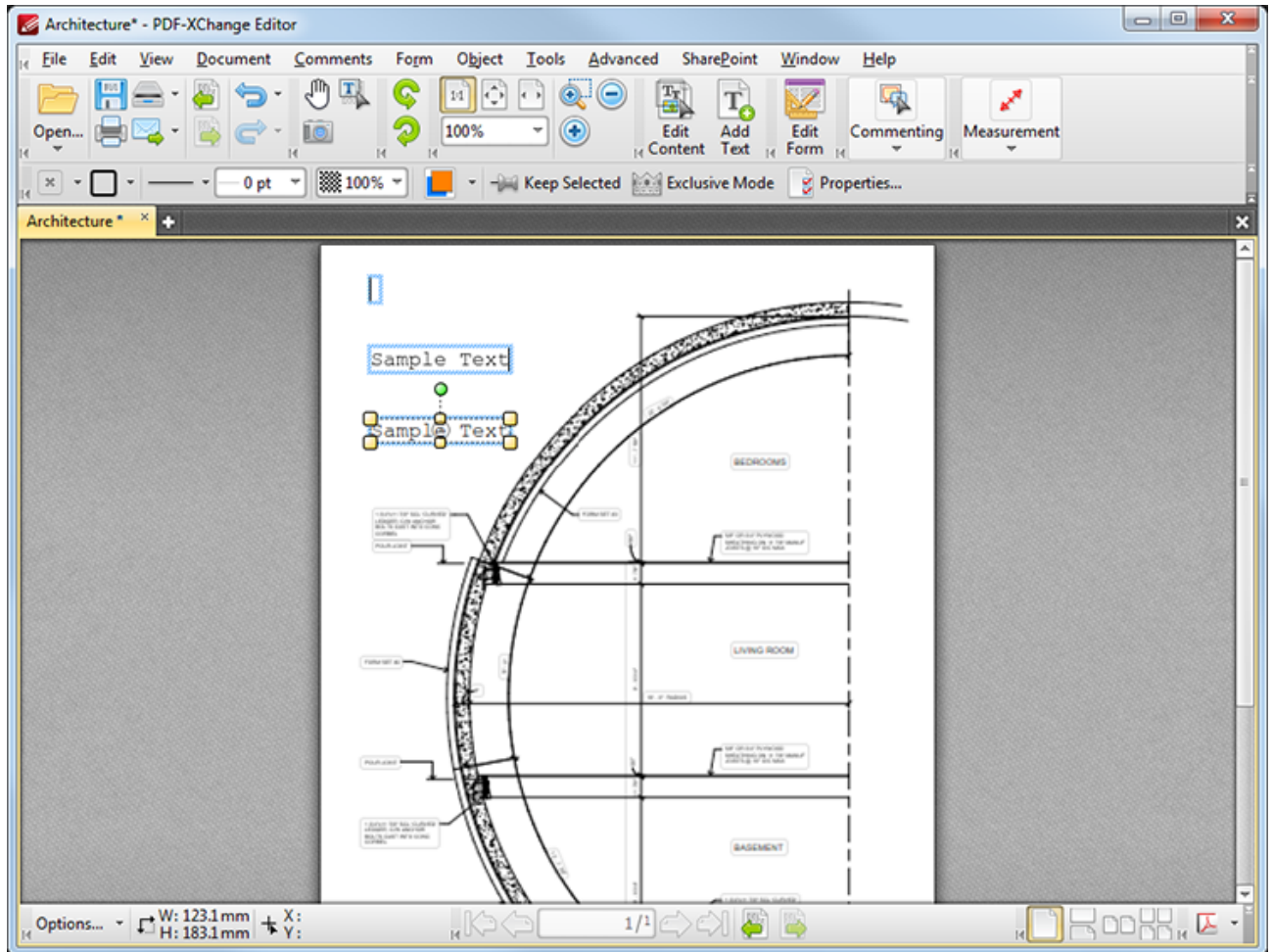
Figure 2. Typewriter Tool Example

- 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** 484 when text is being entered. See **here** 863 for an explanation of these options.
- The central image is how a typewriter note appears when text is being entered. Right-click typewriter notes at this point to launch the text editing options menu. Text editing options are explained **here.** 810
- 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.
  - Use the editing aids detailed **here** 525 to assist in the precise placement of typewriter text boxes.

- Right-click typewriter text boxes for further options. See **here** [865] for an explanation of these options.
- When the **Typewriter Tool** is selected, the following options are enabled in the **Properties Toolbar:** [484]
  - **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 the manner in which text boxes blend with underlying content. These options are explained **here.** [794]
  - **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 standard manner.
  - Click **Properties** to view/edit the **Typewriter Tool Properties** pane. See **here** [869] for information on tool properties.
- The **Commenting** [275] section of the **Preferences** [229] dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** [625] can be used to save customized typewriter note styles for subsequent use. Right-click the **Typewriter Note** icon in the **Commenting Toolbar** [471] to view existing styles and/or access the **Comment Styles Palette.**

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** [810] for information on editing text boxes.

6.7.4.4 Text Box Tool

Text Box Tool

Click **Text Box Tool** to add interactive text boxes to documents:
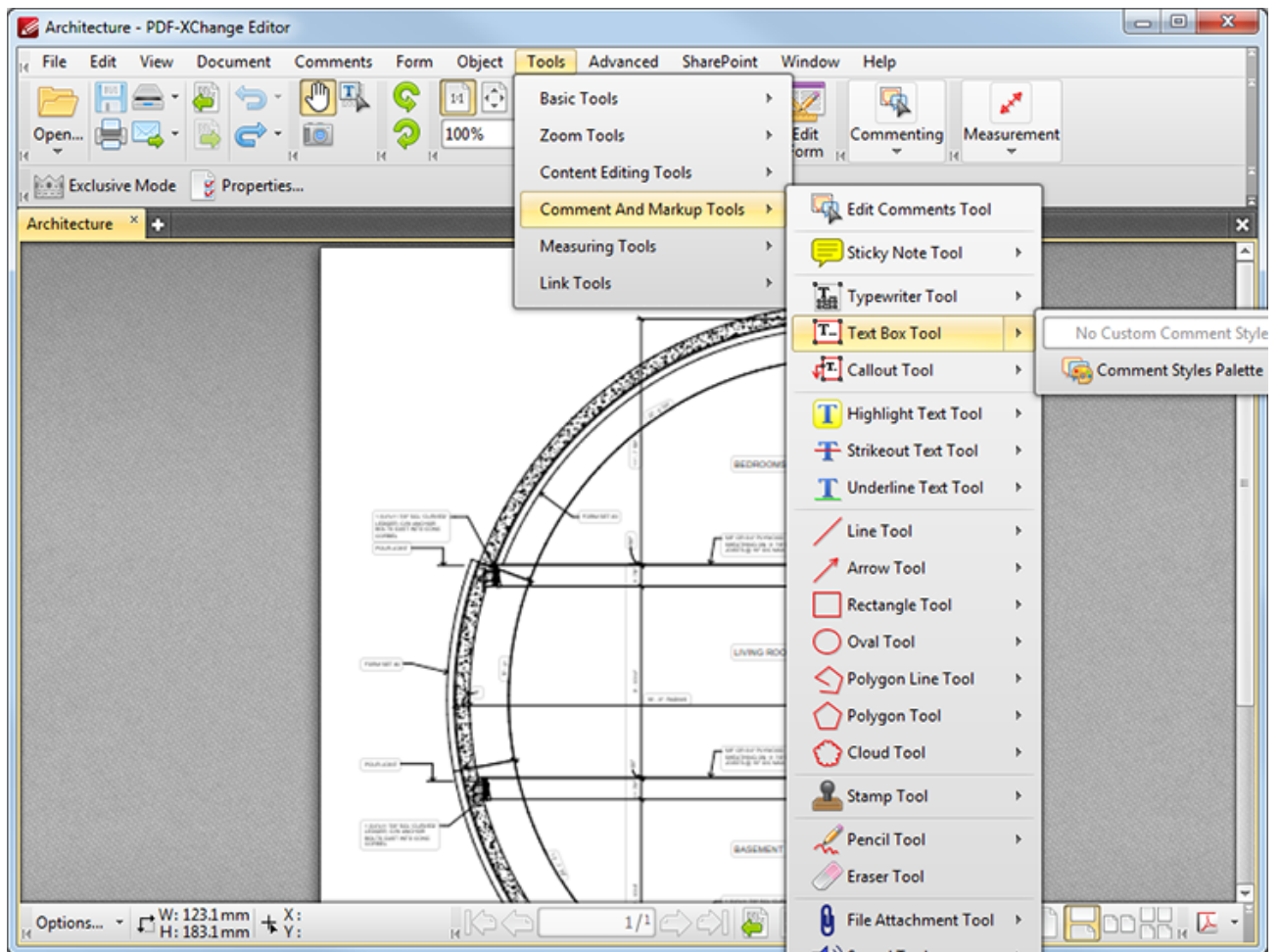
Figure 1. Tools Tab Submenu. Text Box Tool

When the **Text Box Tool** is selected, click and drag the pointer to determine the size of text boxes:
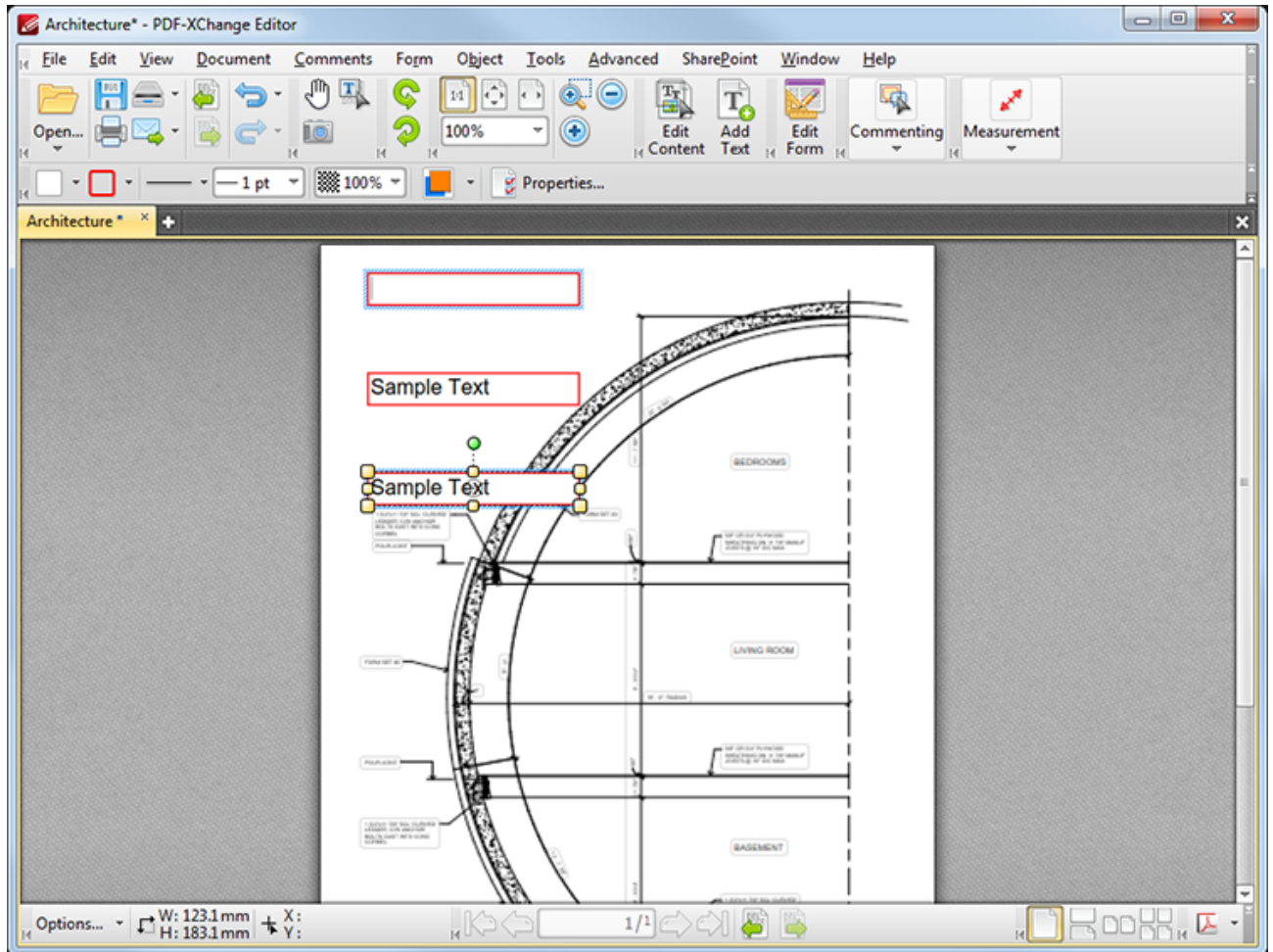
Figure 2. Text Box Tool Example

- 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 Toolbar** ⌐484⌐ when text is being entered. See **here** ⌐863⌐ for an explanation of these options.
- The central image is how a text box appears when text is being entered. Right-click text boxes at this point to launch the text editing options menu. Text editing options are explained **here.** ⌐810⌐
- 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.
    - Use the editing aids detailed **here** ⌐525⌐ to assist in the precise placement of text boxes.
    - Right-click text boxes for further options. See **here** ⌐865⌐ for an explanation of these options.
- When the **Text Box Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⌐484⌐

- **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 the manner in which text boxes blend with underlying content. These options are explained **here.** [794]
- **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 standard manner.
- Click **Properties** to view/edit the **Text Box Tool Properties** pane. See **here** [869] for information on tool properties.
- The **Commenting** [275] section of the **Preferences** [229] dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** [625] can be used to save customized text box styles for subsequent use. Right-click the **Text Box** icon in the **Commenting Toolbar** [471] to view existing styles and/or access the **Comment Styles Palette.**

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** [810] for information on editing text boxes.

6.7.4.5   Callout Tool

 Callout Tool

Click **Callout Tool** to add interactive callout annotations to documents:
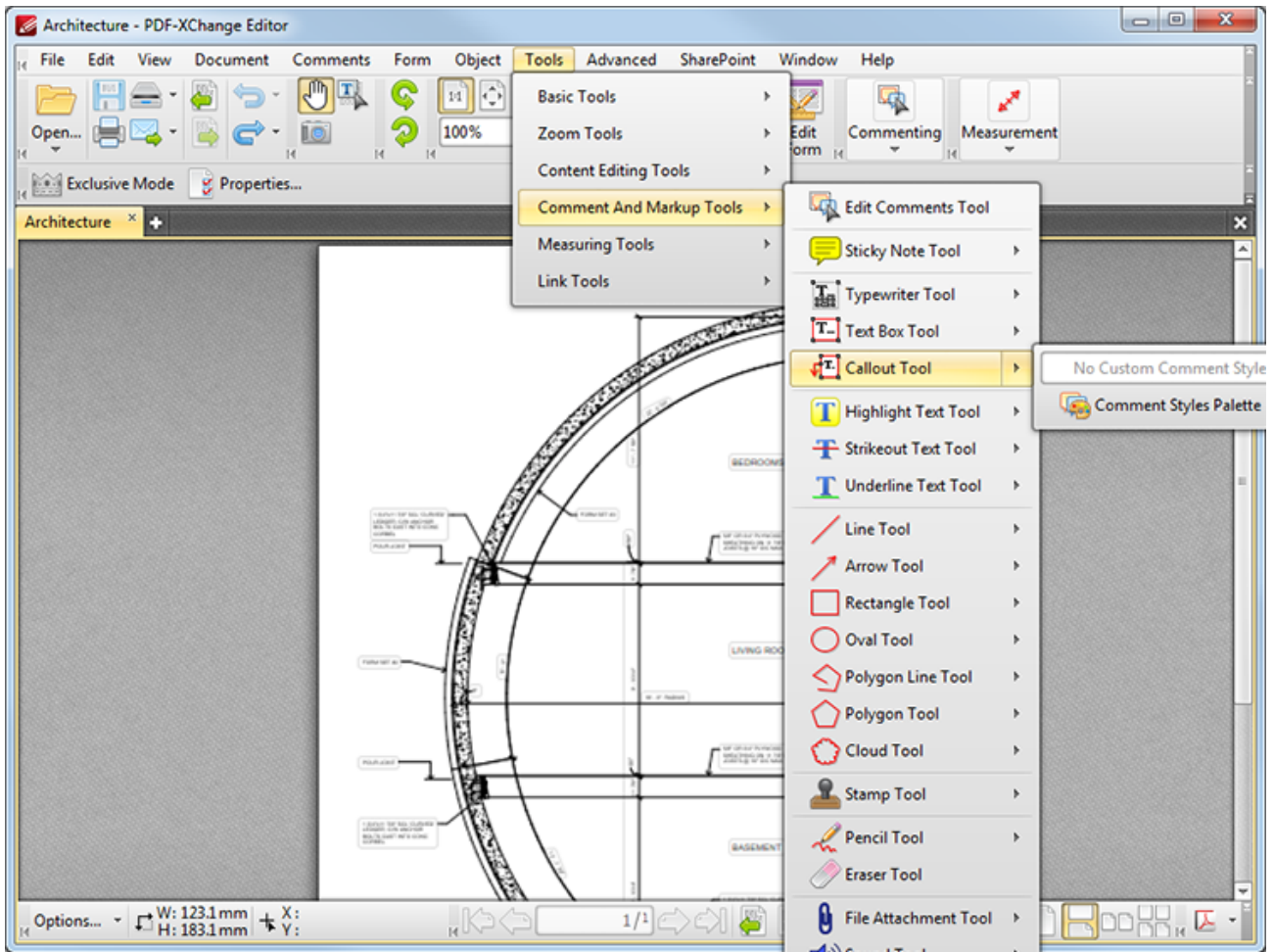
Figure 1. Tools Tab Submenu. Callout Tool

Callout annotations are used to highlight specific document points. 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:
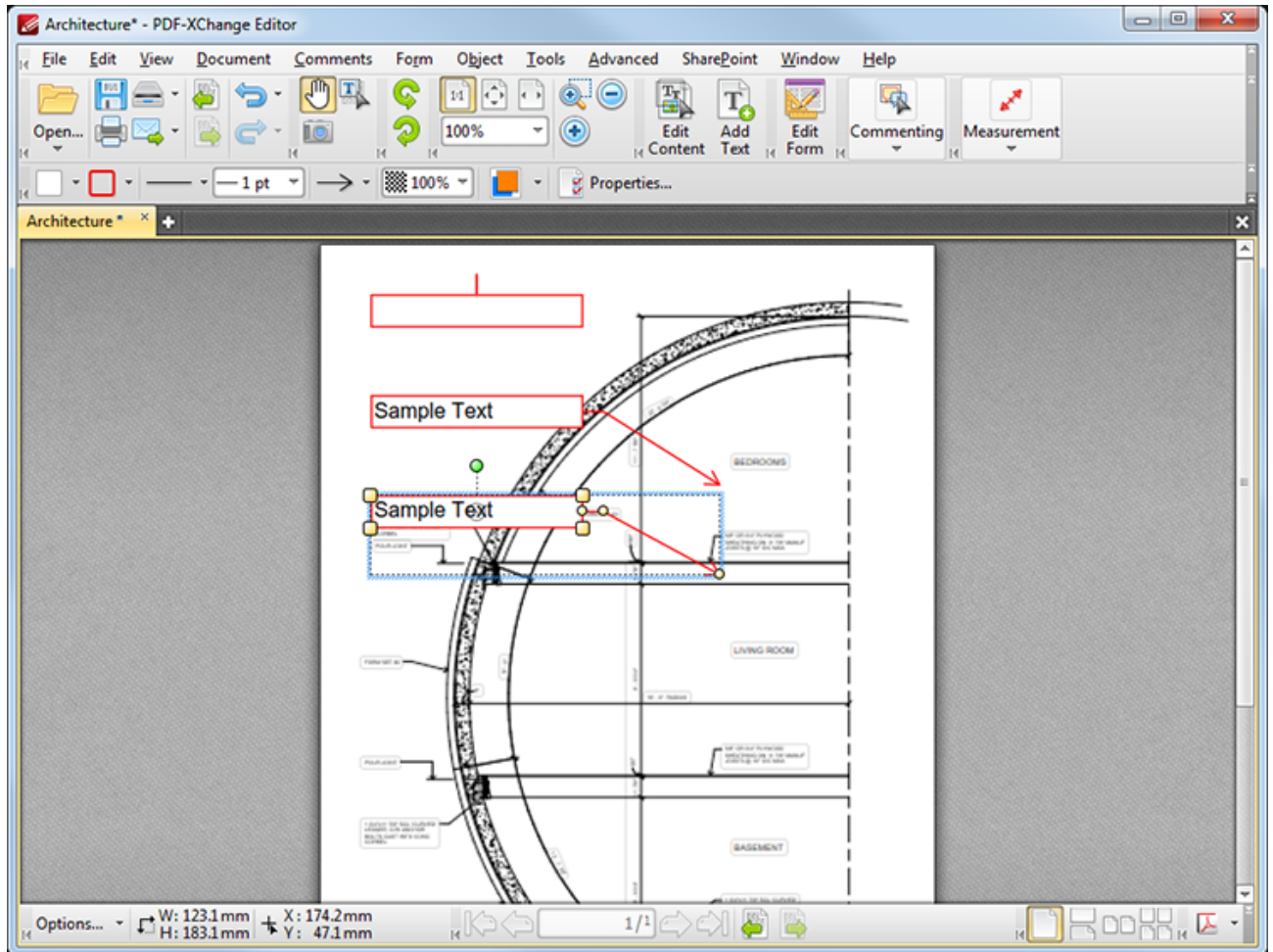
Figure 2. Callout Tool Example

- 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** 484 when text is being entered. See **here** 863 for an explanation of these options.
- The central image is how a callout annotation appears when text is being entered. Right-click callout annotations at this point to launch the text editing options menu. Text editing options are explained **here.** 810
- 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.
    - 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.
    - Use the editing aids detailed **here** 525 to assist in the precise placement of callout annotations.

- Right-click callout annotations for further options. See **here** ⃞865 for an explanation of these options.
- When the **Callout Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⃞484
  - **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 the manner in which callouts blend with underlying content. These options are explained **here.** ⃞794
  - **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 standard manner.
  - Click **Properties** to view/edit the **Callout Tool Properties** pane. See **here** ⃞869 for information on tool properties.
- The **Commenting** ⃞275 section of the **Preferences** ⃞229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** ⃞625 can be used to save customized callout annotation styles for subsequent use. Right-click the **Callout** icon in the **Commenting Toolbar** ⃞471 to view existing styles and/or access the **Comment Styles Palette.**

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** ⃞810 for information on editing callout text boxes.

6.7.4.6 Highlight Text Tool

![PDF-XChange Editor red PDF icon with pencil] **Highlight Text Tool**

Click **Highlight Text Tool** to highlight document text:
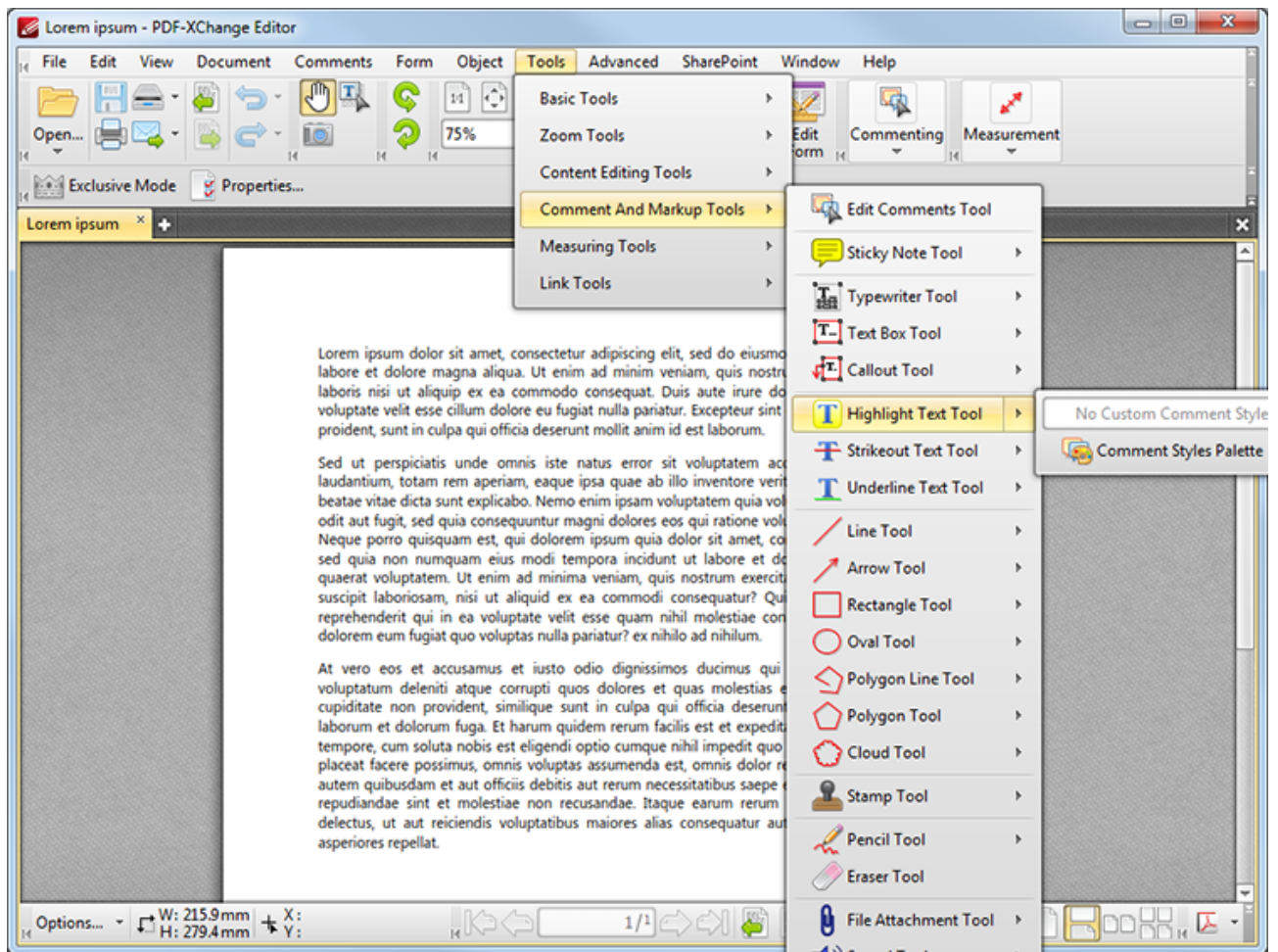
Figure 1. Tools Tab Submenu. Highlight Text Tool

When the **Highlight Text Tool** is selected, the pointer icon will change when it hovers over text. Click and drag to highlight text:
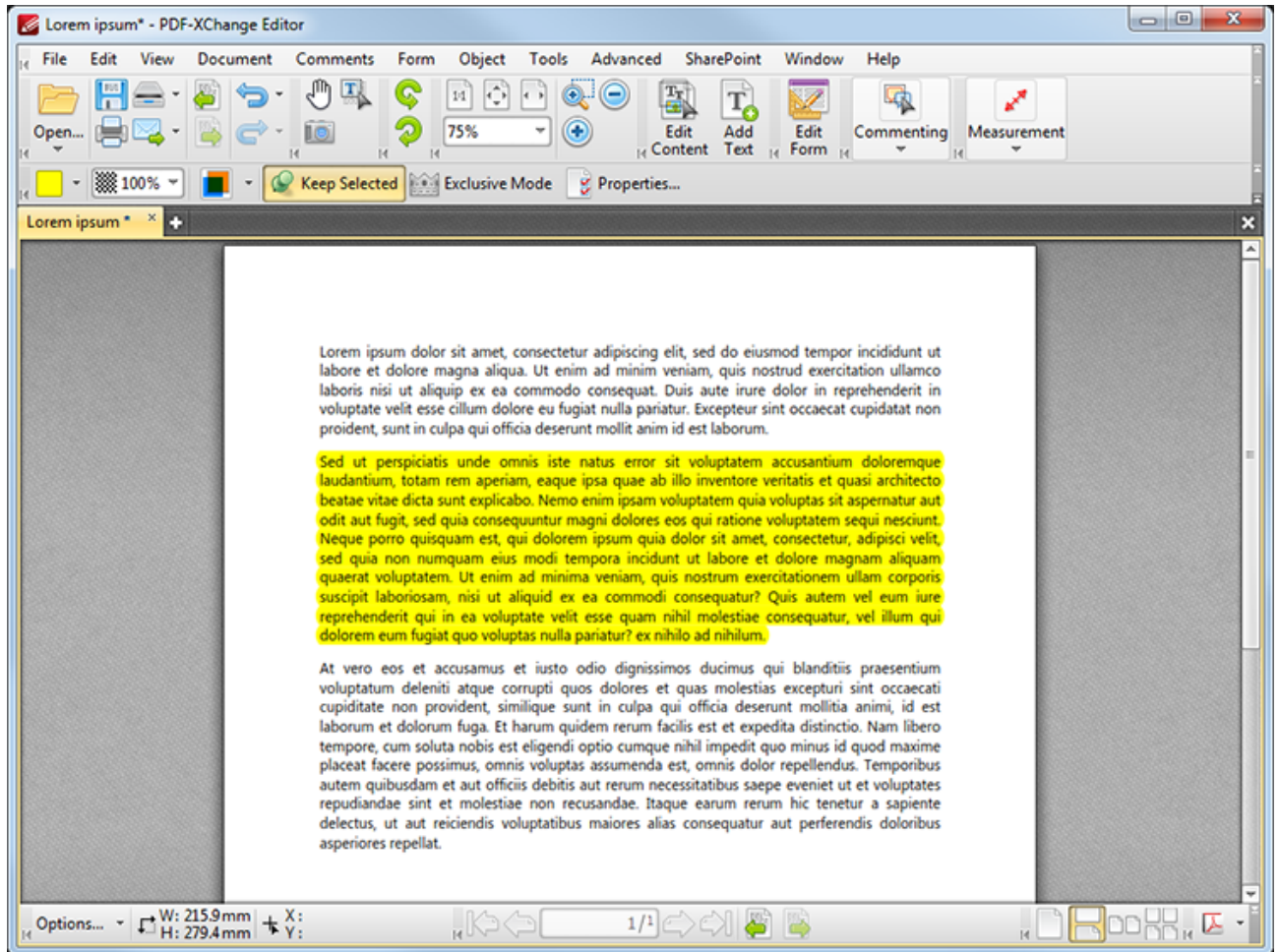
Figure 2. Highlight Text Tool Example

When the **Highlight Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484

- **Fill Color** determines the highlight color.
- **Opacity** determines the level of transparency in the highlight.
- **Blend Mode** determines the manner in which highlights blend with underlying content. These options are explained **here.** 794
- **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 standard manner.

- Click **Properties** to view/edit the **Highlight Text Tool Properties** pane. See **here** 869 for information on tool properties.

Additionally, please note:

- Right-click highlighted text and select **Delete** to remove highlights. See **here** 865 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** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.

The **Comment Styles Palette** 625 can be used to save customized highlight styles for subsequent use. Right-click the **Highlight** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.7   Strikeout Text Tool

Strikeout Text Tool

Click **Strikeout Text Tool** to strikeout document text:
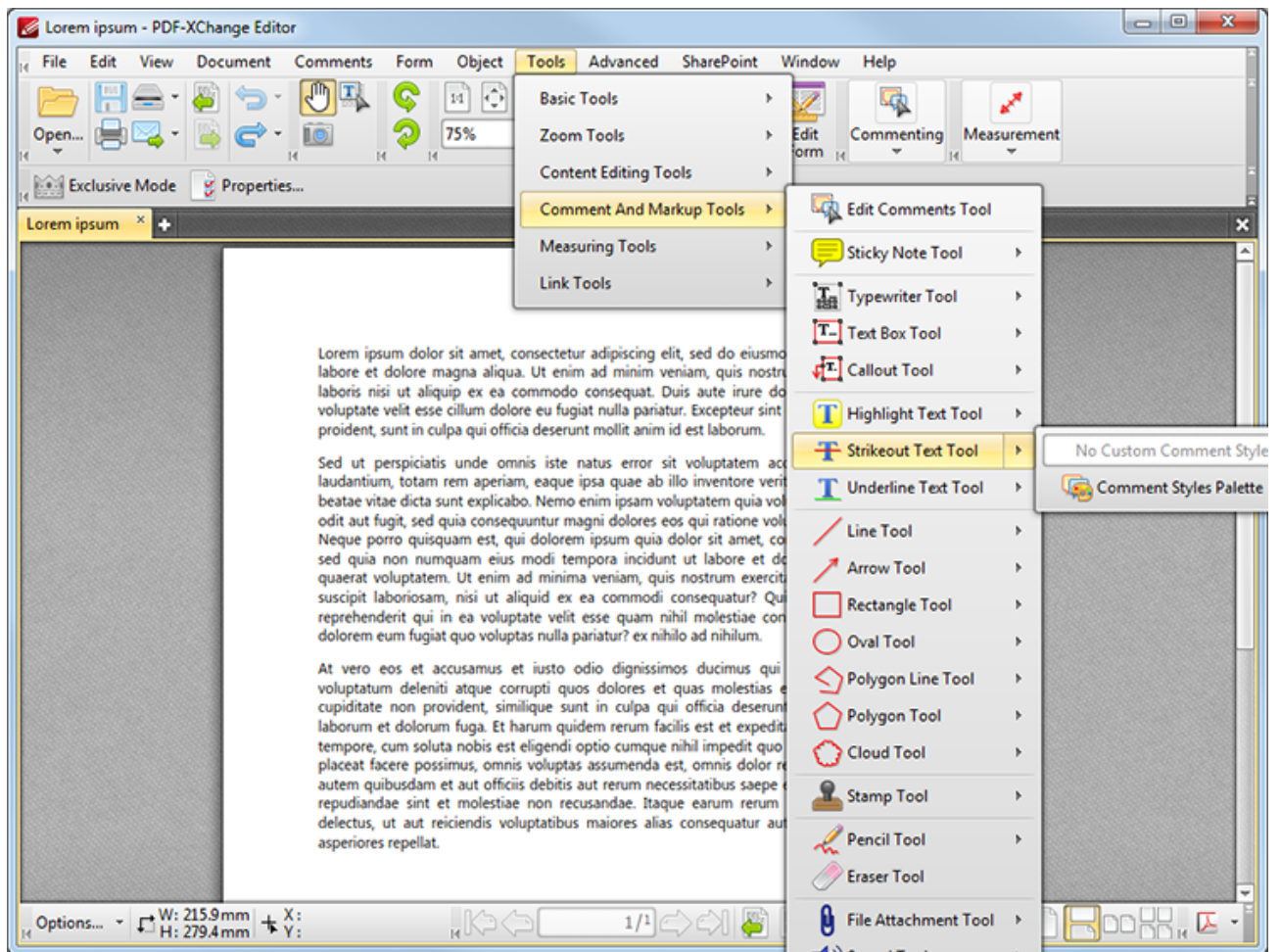
Figure 1. Tools Tab Submenu. Strikeout Text Tool

When the **Strikeout Text Tool** is selected, the pointer icon will change 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:
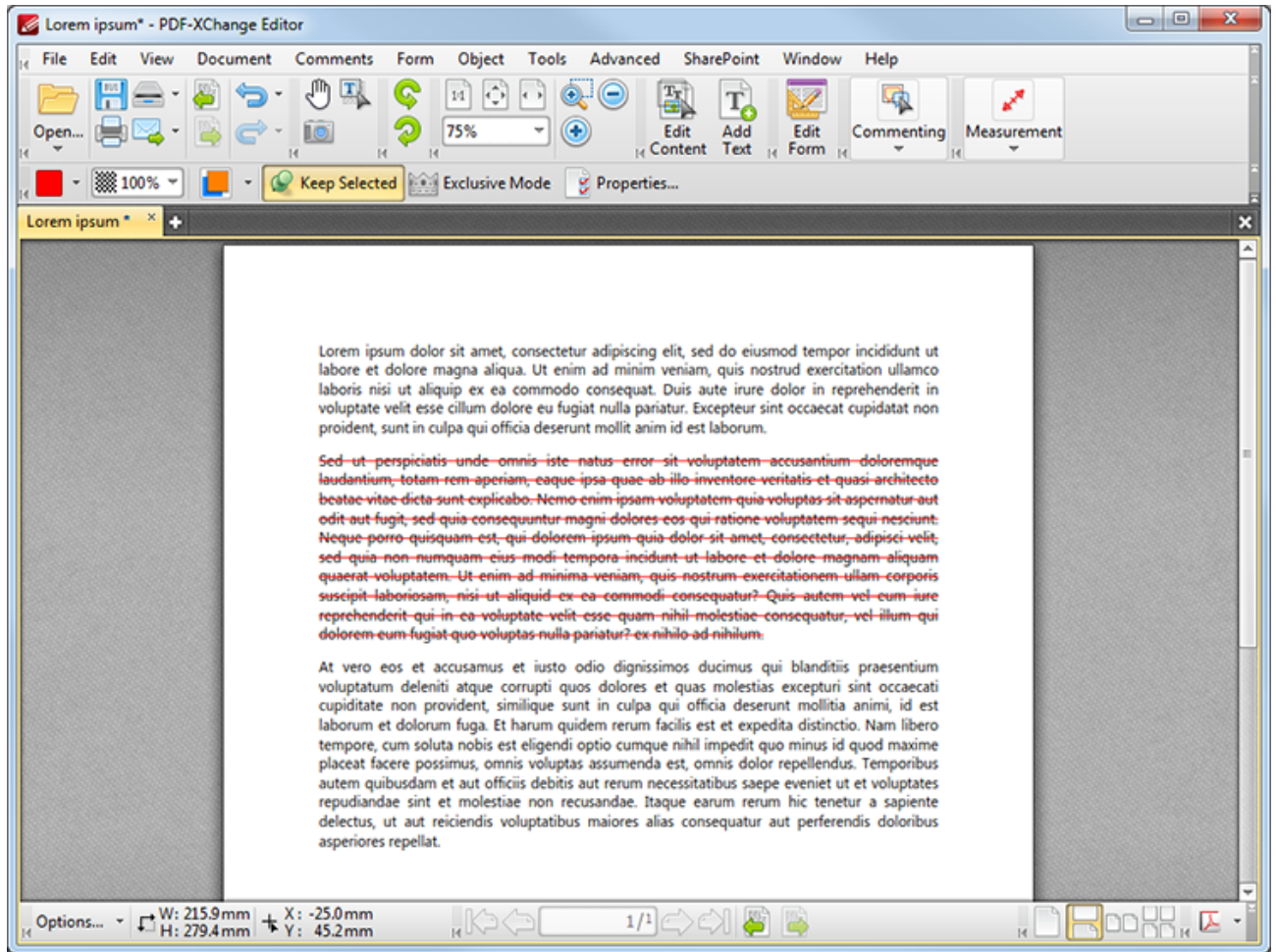
Figure 2. Strikeout Text Tool Example

When the **Strikeout Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484

- **Fill Color** determines the strikeout color.
- **Opacity** determines the level of transparency in the strikeout.
- **Blend Mode** determines the manner in which strikeouts blend with underlying content. These options are explained **here.** 794
- **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 standard manner.

- Click **Properties** to view/edit the **Strikeout Text Tool Properties** pane. See **here** ⟦869⟧ for information on tool properties.
- The **Commenting** ⟦275⟧ section of the **Preferences** ⟦229⟧ dialog box can be used to view/edit preferences for comments.

Right-click struck-out text and select **Delete** to remove strikeout lines. See **here** ⟦865⟧ for an explanation of the other options in the right-click context menu.

The **Comment Styles Palette** ⟦625⟧ can be used to save customized strikeout styles for subsequent use. Right-click the **Strikeout** icon in the **Commenting Toolbar** ⟦471⟧ to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.8   Underline Text Tool

Underline Text Tool

Click **Underline Text Tool** to underline document text:
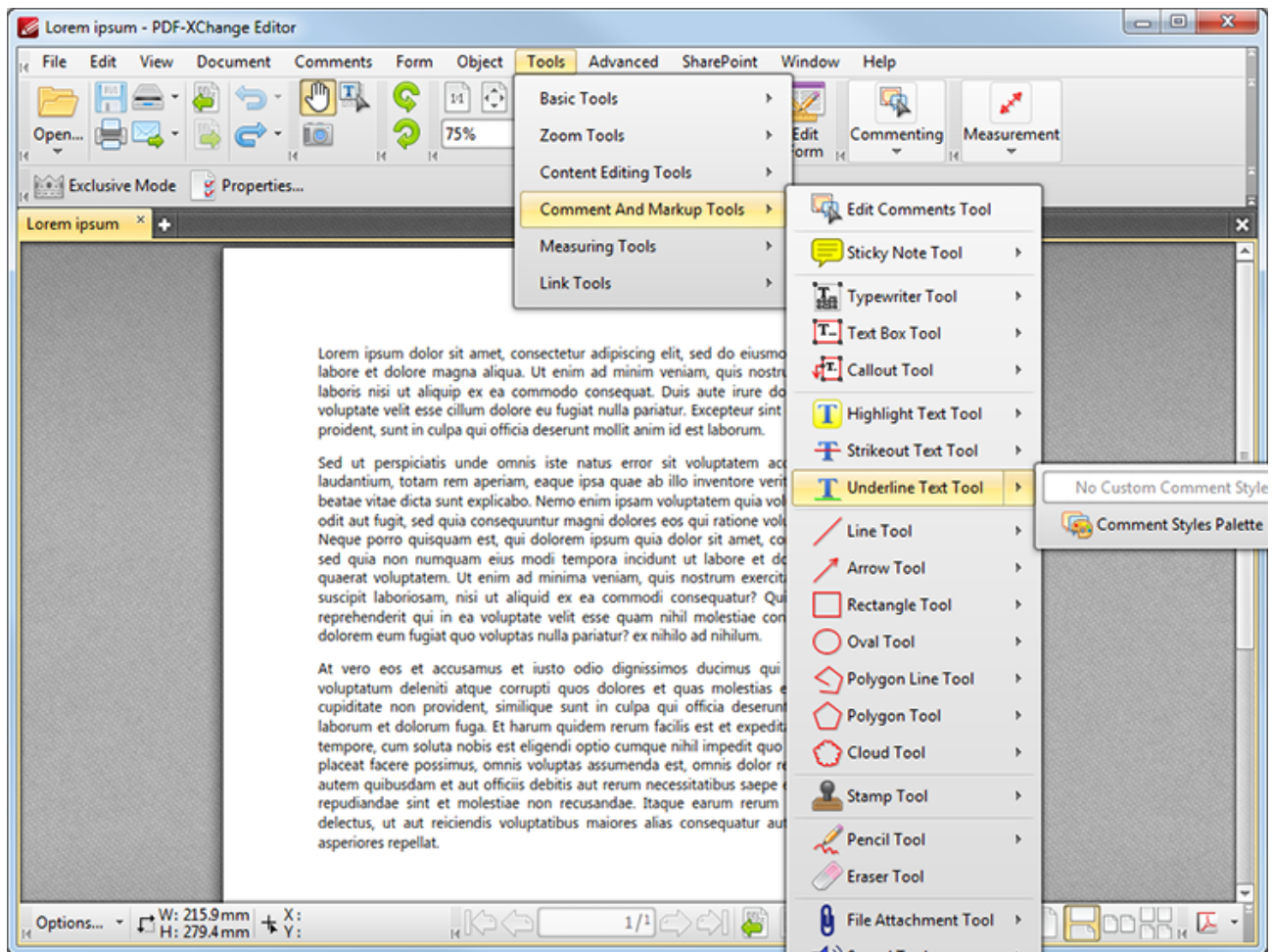
Figure 1. Tools Tab Submenu. Underline Text Tool

When the **Underline Text Tool** is selected, the pointer icon will change 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:
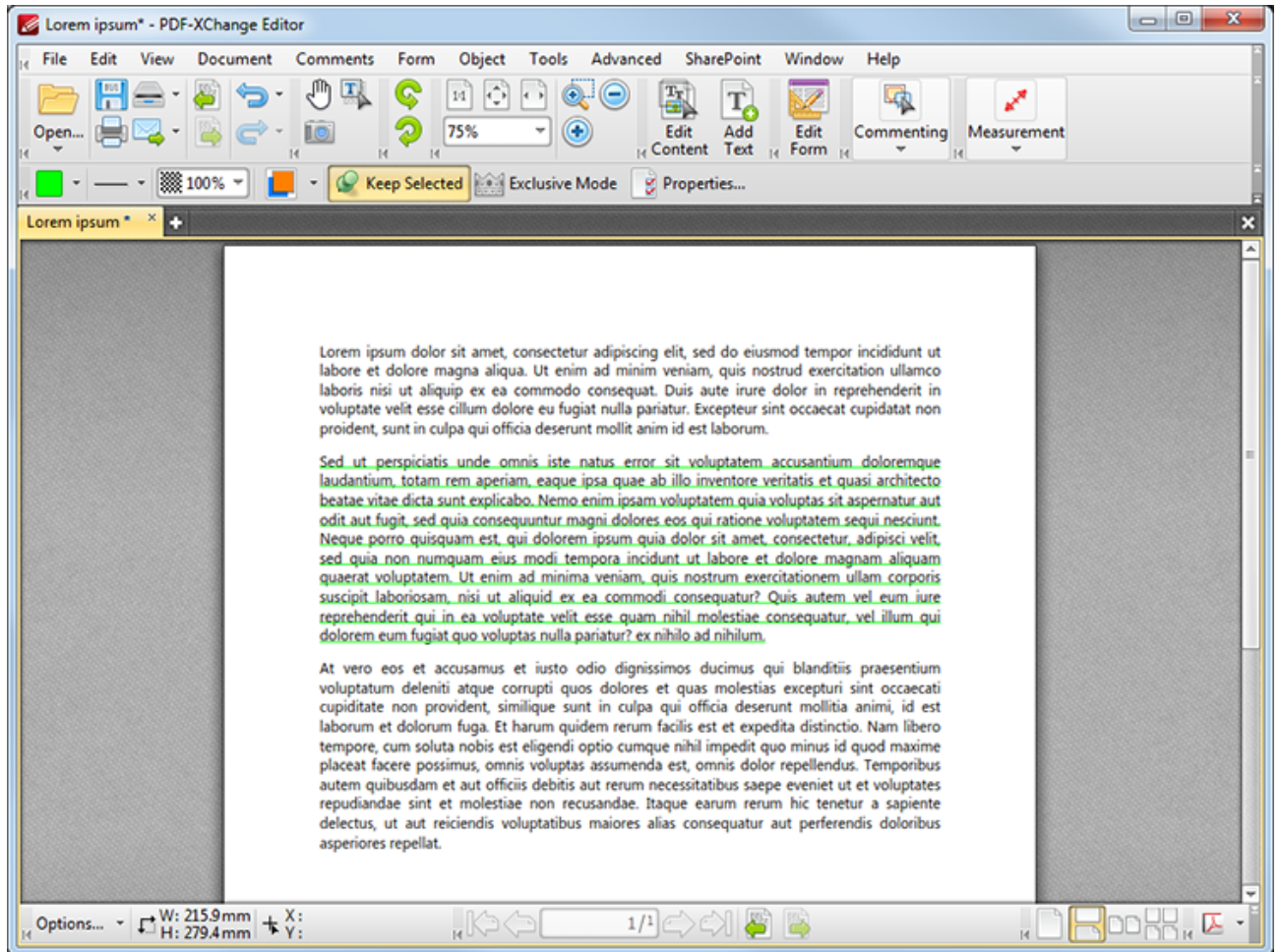
Figure 2. Underline Text Tool Example

When the **Underline Text Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484

- **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 the manner in which underlines blend with underlying content. These options are explained **here.** 794
- **Keep Selected** determines whether or not the **Underline 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 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 standard manner.

- Click **Properties** to view/edit the **Underline Text Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.

Right-click underlined text and select **Delete** to remove underlines. See **here** 865 for an explanation of the other options in the right-click context menu.

The **Comment Styles Palette** 625 can be used to save customized underline styles for subsequent use. Right-click the **Underline** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.9 Line and Arrow Tools

Line and Arrow Tools

Click **Line Tool** or **Arrow Tool** to select these tools:
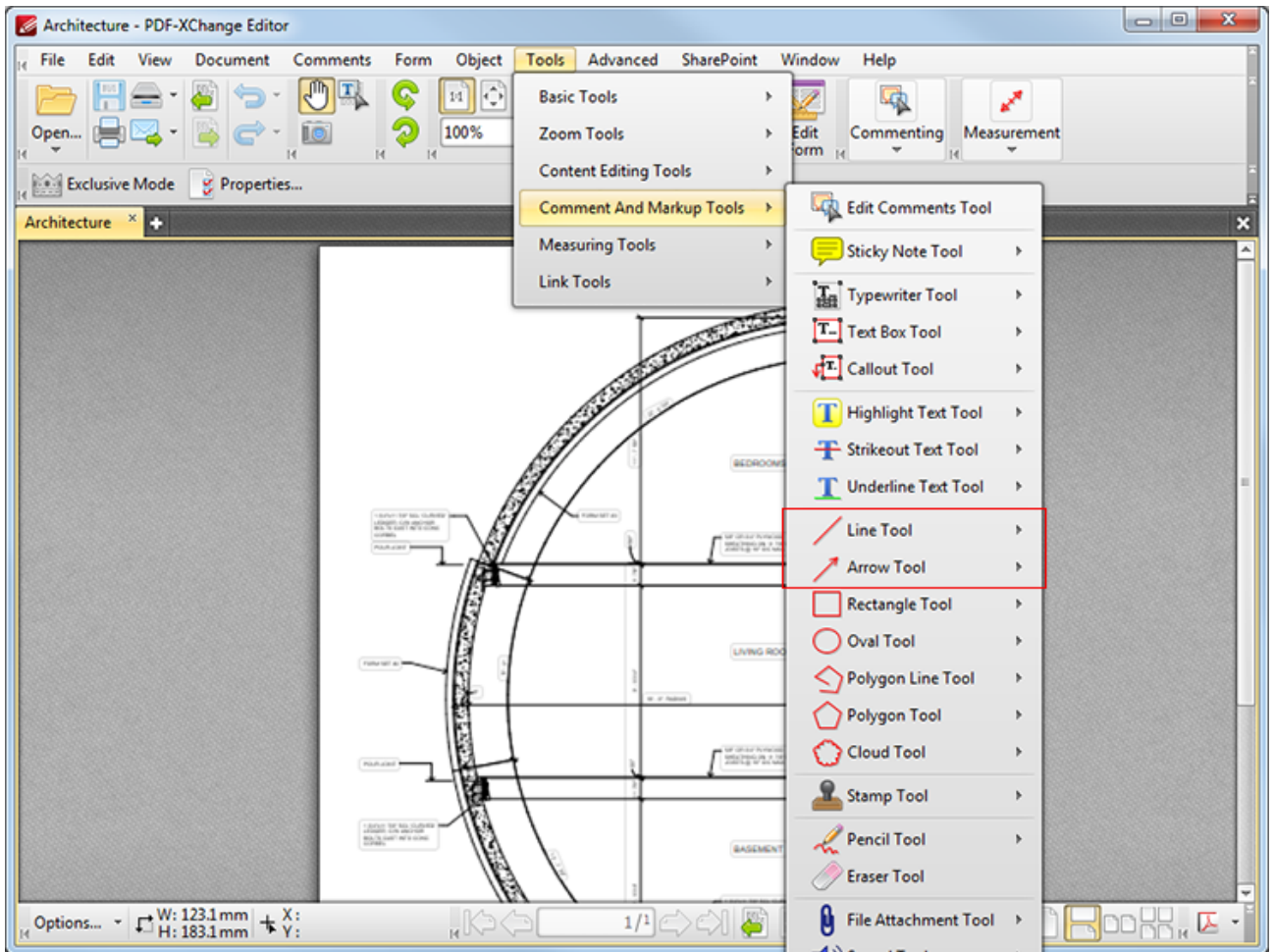
Figure 1. Tools Tab Submenu. Line and Arrow Tools

These tools operate in an identical manner and are used to annotate documents. The **Line Tool** adds a line and the **Arrow Tool** adds an arrow. When these tools are selected the pointer becomes a crosshairs icon. Click to initiate a line/arrow. Drag to the desired location and click to complete the operation. They will appear as below:
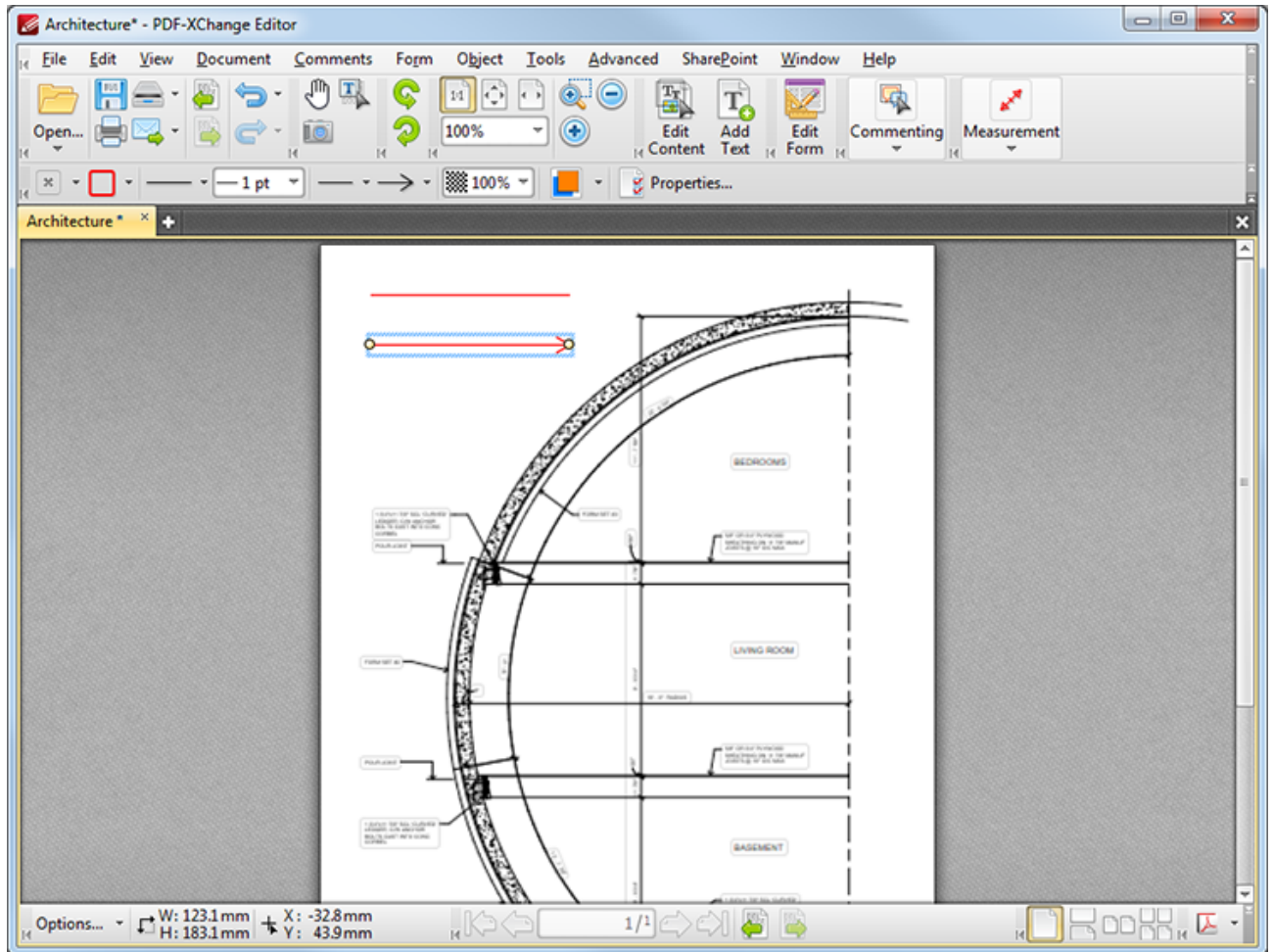
Figure 2. Line and Arrow Example

The arrow has just been placed, which means editing options are enabled:

- Click and drag the control points to reposition line endings.
- Click and drag content to reposition it.
- Use the arrow keys to reposition lines/arrows.
- Use the editing aids detailed **here** 525 to assist in the precise placement of lines/arrows.
- Right-click content for further options. See **here** 865 for an explanation of these options.
- Hold down Shift to create lines/arrows at increments of fifteen degrees.
- When the **Line/Arrow Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
    - **Fill Color** determines the fill color of the **Line Starting/Ending Styles,** detailed below, when closed-shape options are used.
    - **Stroke Color** determines the content color.
    - **Border Style** determines the content 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 lines/arrows.

- **Line Ending Style** determines the style used at the end of lines/arrows.
- **Opacity** determines the level of transparency.
- **Blend Mode** determines the manner in which content blends with underlying content. These options are explained **here.** ⁷⁹⁴
- **Keep Selected** determines whether or not the **Line/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 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/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 standard manner.
- Click **Properties** to view/edit the **Line/Arrow Tool Properties** pane. See **here** ⁸⁶⁹ for information on tool properties.
- The **Commenting** ²⁷⁵ section of the **Preferences** ²²⁹ dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** ⁶²⁵ can be used to save customized line and arrow styles for subsequent use. Right-click the **Line** or **Arrow** icon in the **Commenting Toolbar** ⁴⁷¹ to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.10 Rectangle Tool

Rectangle Tool

Click **Rectangle Tool** to add interactive rectangles to documents:
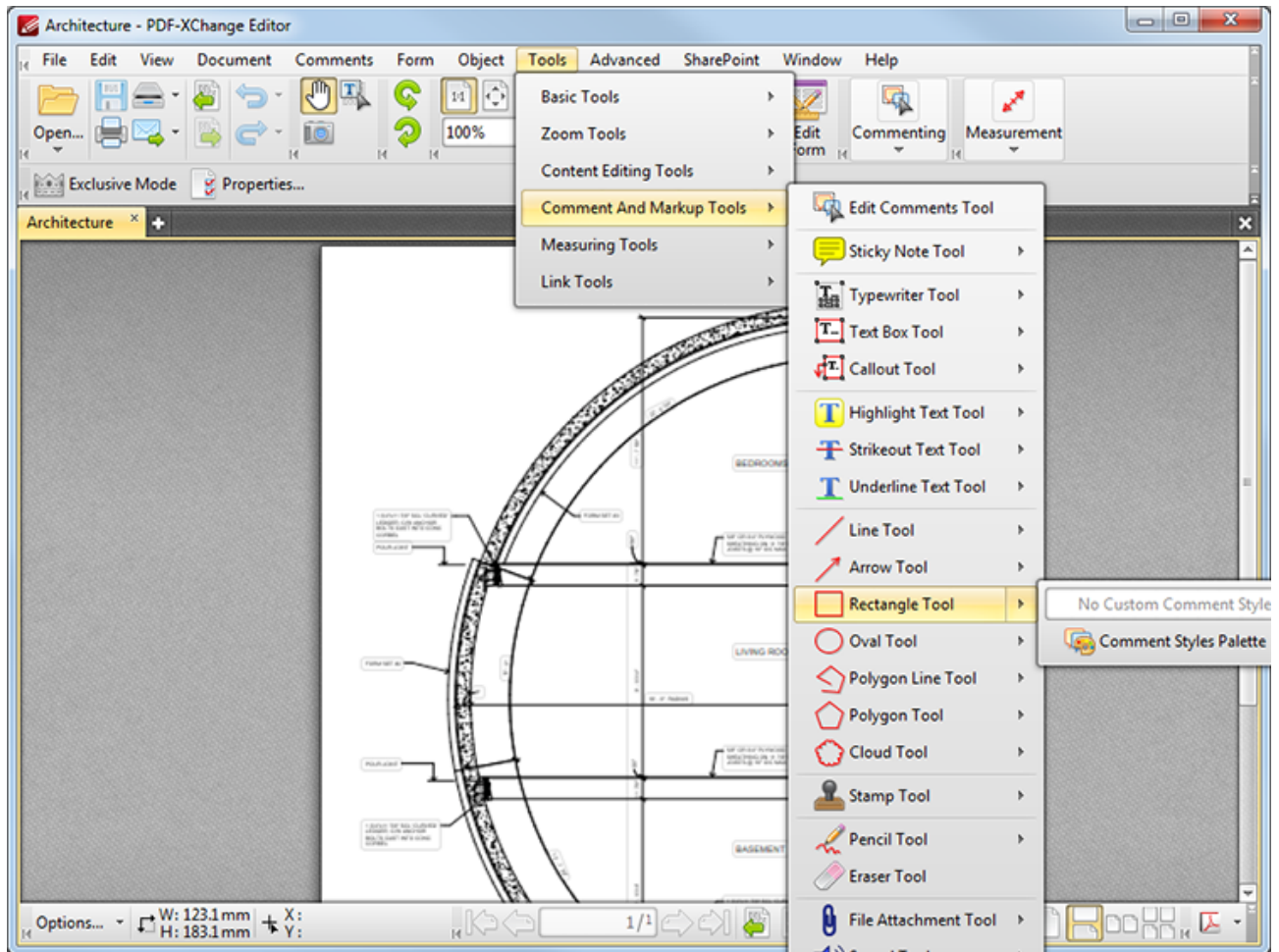
Figure 1. Tools Tab Submenu. Rectangle Tool

When the **Rectangle Tool** is selected, click and drag the pointer to define rectangle borders:

Figure 2. Rectangle Tool Example

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.
- Use the editing aids detailed **here** 525 to assist in the precise placement of rectangles.
- Right-click rectangles for further options. See **here** 865 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:** 484
    - **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 the manner in which rectangles blend with underlying content. These options are explained **here.** 794
- **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 standard manner.
- Click **Properties** to view/edit the **Rectangle Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** 625 can be used to save customized rectangle styles for subsequent use. Right-click the **Rectangle** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.11 Oval Tool

Oval Tool

Click **Oval Tool** to add interactive ovals to documents:
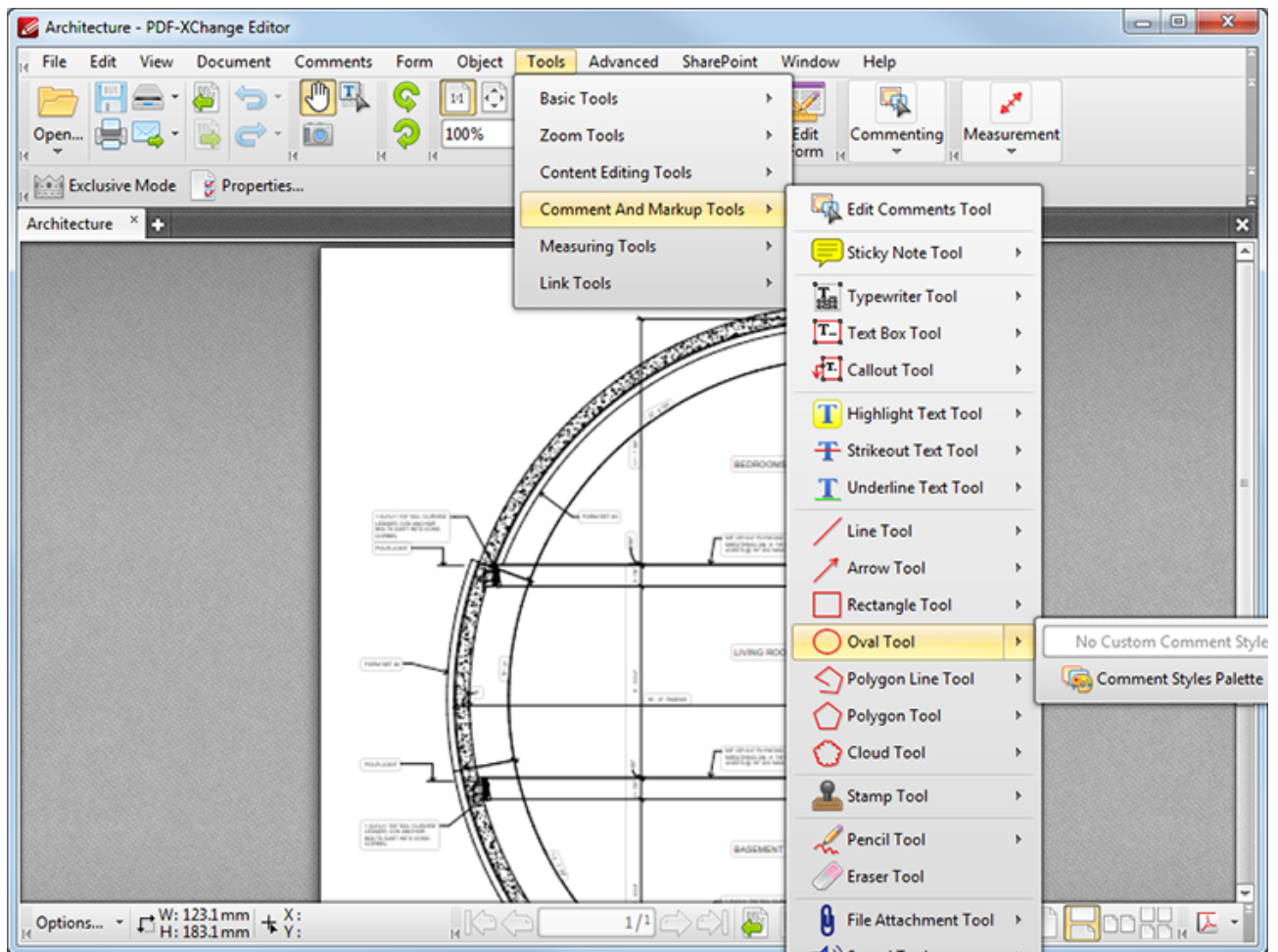
Figure 1. Tools Tab Submenu. Oval Tool

When the **Oval Tool** is selected, click and drag the pointer to define oval borders:

Figure 2. Oval Tool Example

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.
- Use the editing aids detailed **here** 525 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** 865 for an explanation of these options.
- When the **Oval Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
  - **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 the manner in which ovals blend with underlying content. These options are explained **here.** ⁷⁹⁴
- **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 standard manner.
- Click **Properties** to view/edit the **Oval Tool Properties** pane. See **here** ⁸⁶⁹ for information on tool properties.

- The **Commenting** ²⁷⁵ section of the **Preferences** ²²⁹ dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** ⁶²⁵ can be used to save customized oval styles for subsequent use. Right-click the **Oval** icon in the **Commenting Toolbar** ⁴⁷¹ to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.12   Polygon Line Tool

Polygon Line Tool

Click **Polygon Line Tool** to add interactive polygon lines to documents:
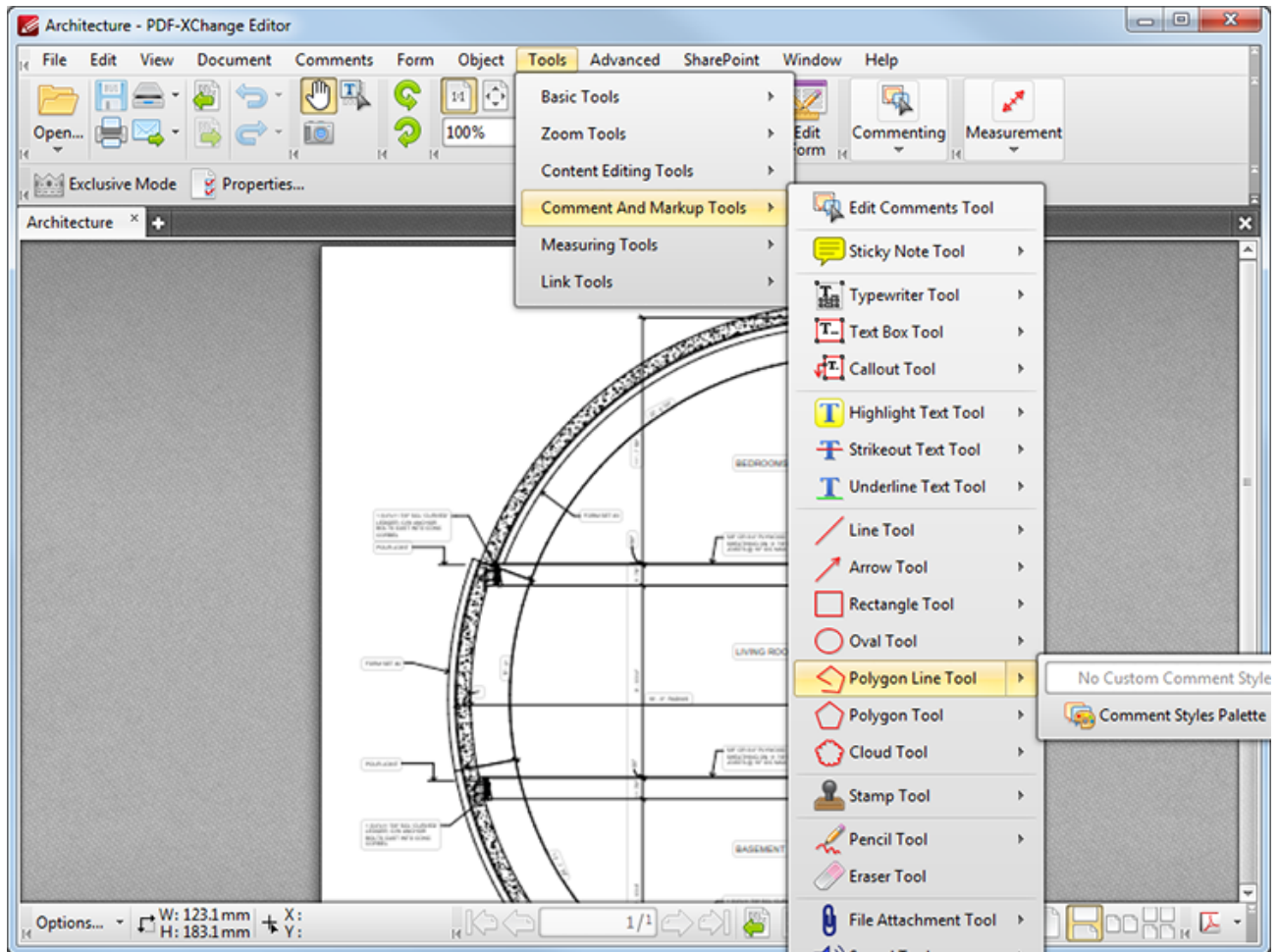
Figure 1. Tools Tab Submenu. Polygon Line Tool

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. Detailed below are examples of the tool:
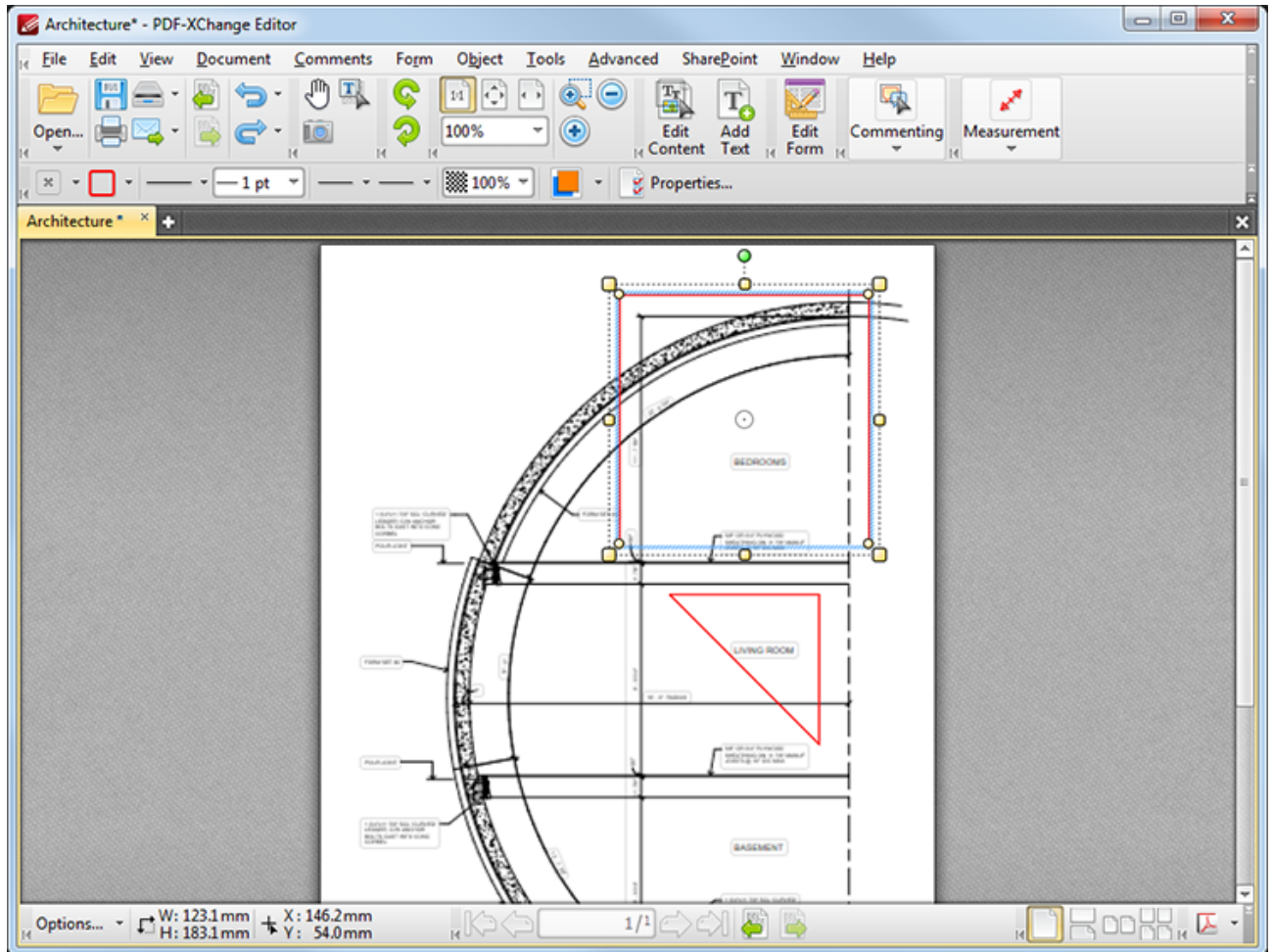
Figure 2. Polygon Line Tool Example

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.
- Use the editing aids detailed **here** ⌐525⌐ to assist in the precise placement of polygon lines.
- Right-click polygon lines for further options. See **here** ⌐865⌐ for an explanation of these options.
- When the **Polygon Line Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⌐484⌐
  - **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 the manner in which polygon lines blend with underlying content. These options are explained **here.** 794
- **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 standard manner.
- Click **Properties** to view/edit the **Polygon Line Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** 625 can be used to save customized polygon line styles for subsequent use. Right-click the **Polyline** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.13 Polygon Tool

 Polygon Tool

Click **Polygon Tool** to add interactive polygons to documents:
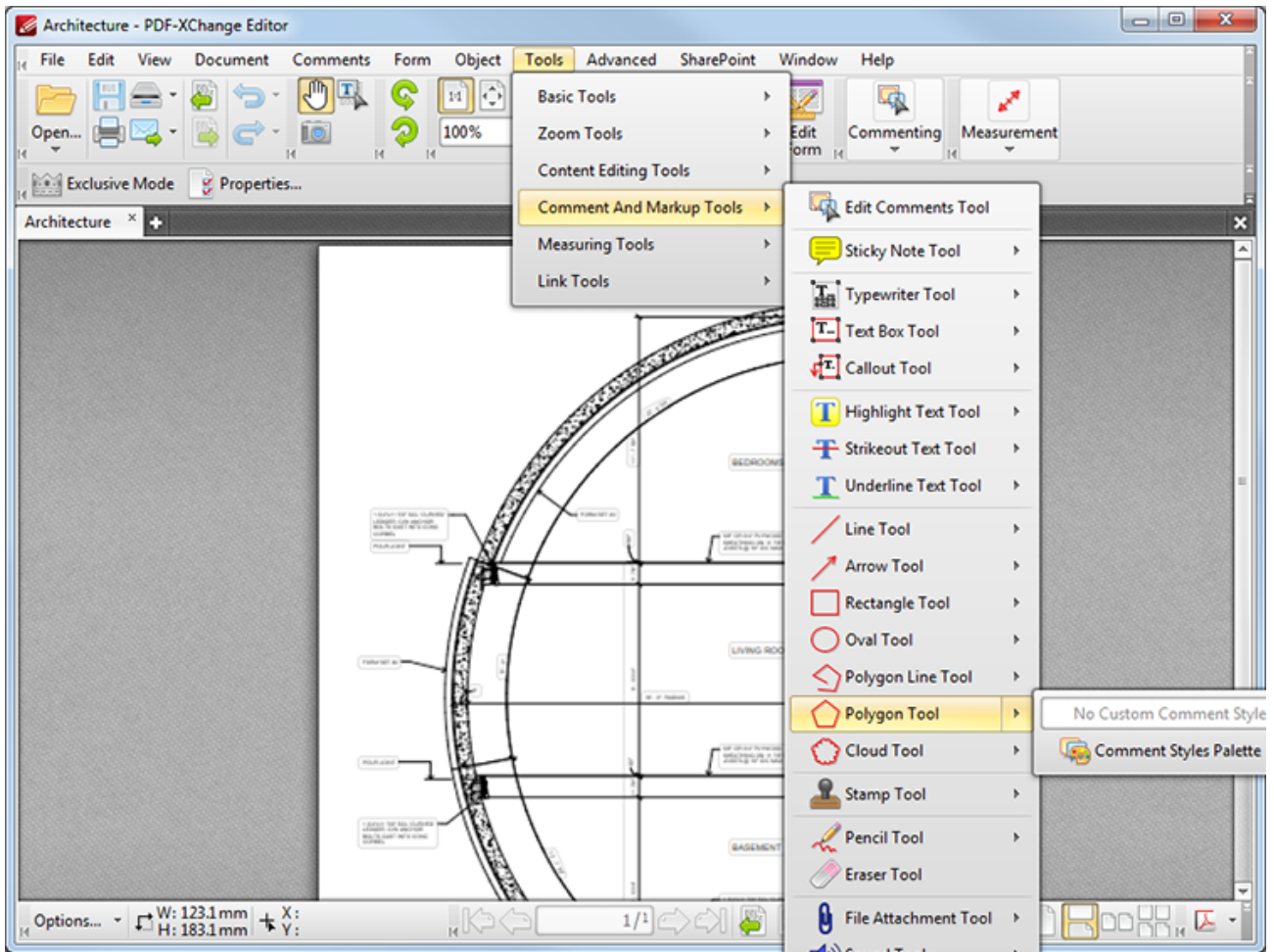
Figure 1. Tools Tab Submenu. Polygon Tool

When the **Polygon Tool** is selected, click to designate the first point of the polygon. Then move the pointer to the next desired 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. Detailed below are examples of the tool:
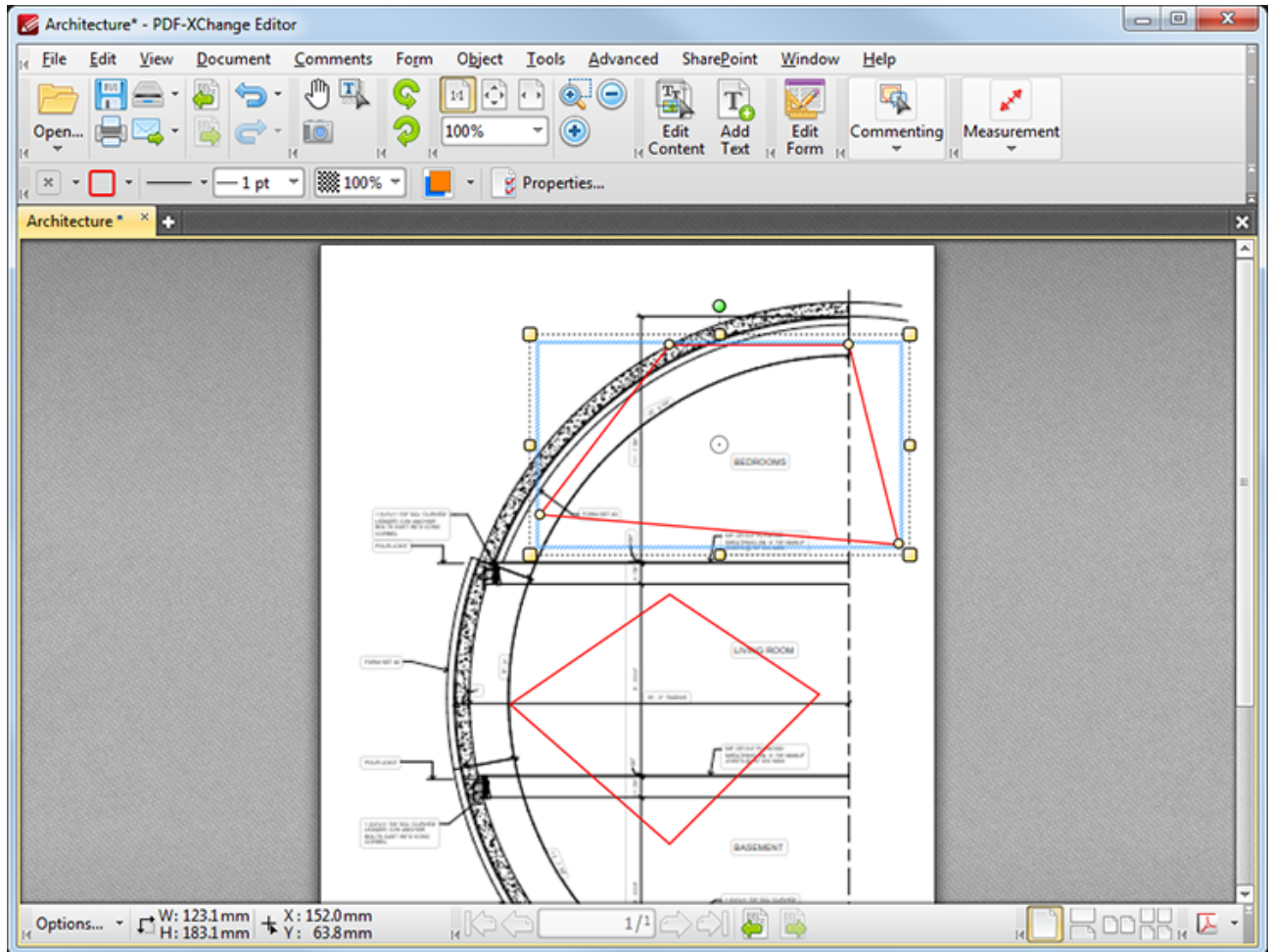
Figure 2. Polygon Tool Example
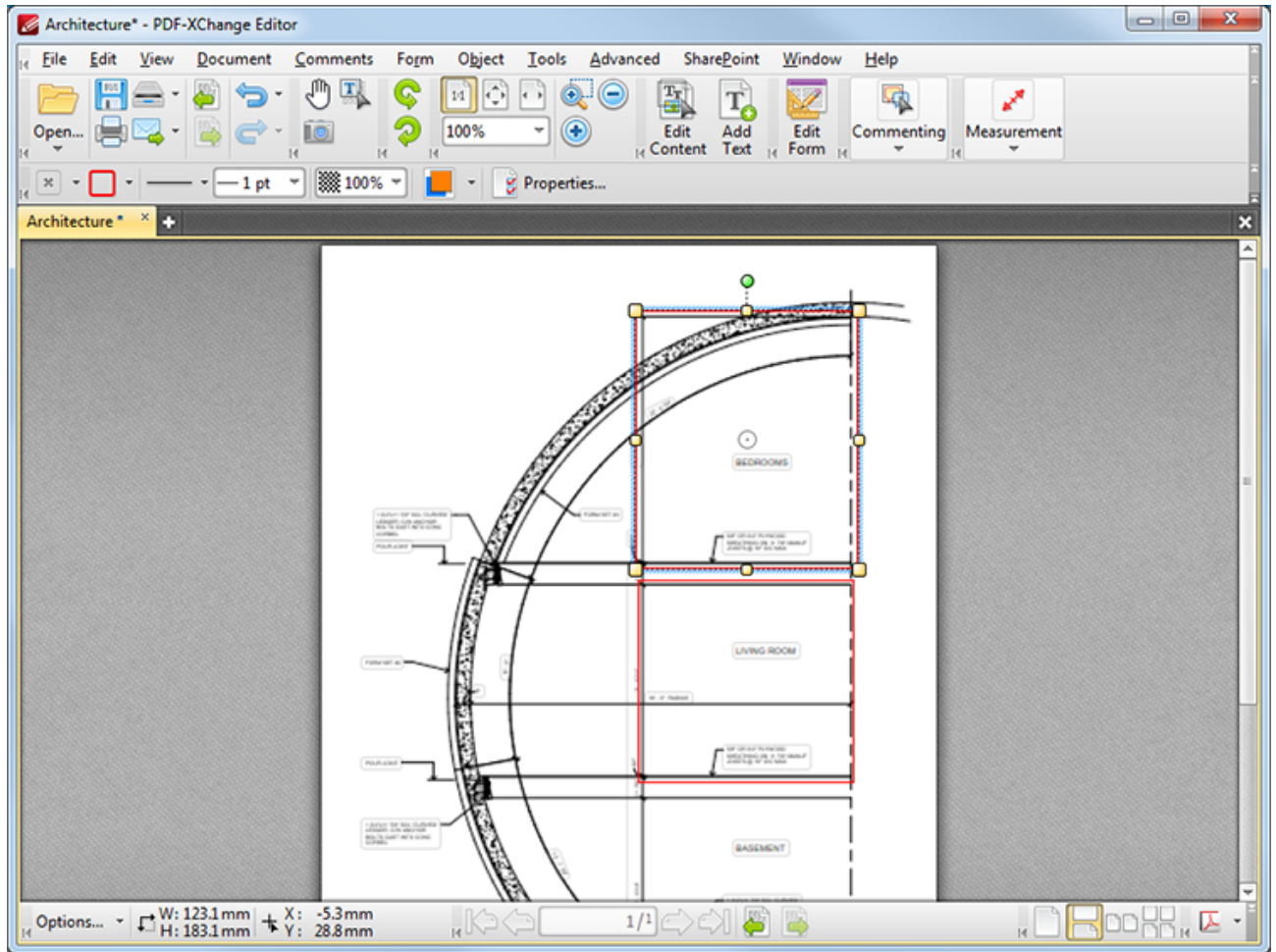
The upper polygon has just been placed, which means editing options are enabled:

- 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.
- Use the editing aids detailed **here** 525 to assist in the precise placement of polygons.
- Right-click polygons for further options. See **here** 865 for an explanation of these options.
- When the **Polygon Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
  - **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 the manner in which polygons blend with underlying content. These options are explained **here.** 794
- **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 standard manner.

- Click **Properties** to view/edit the **Polygon Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** 625 can be used to save customized polygon styles for subsequent use. Right-click the **Polygon** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.14   Cloud Tool

Cloud Tool

Click **Cloud Tool** to add interactive cloud annotations to documents:
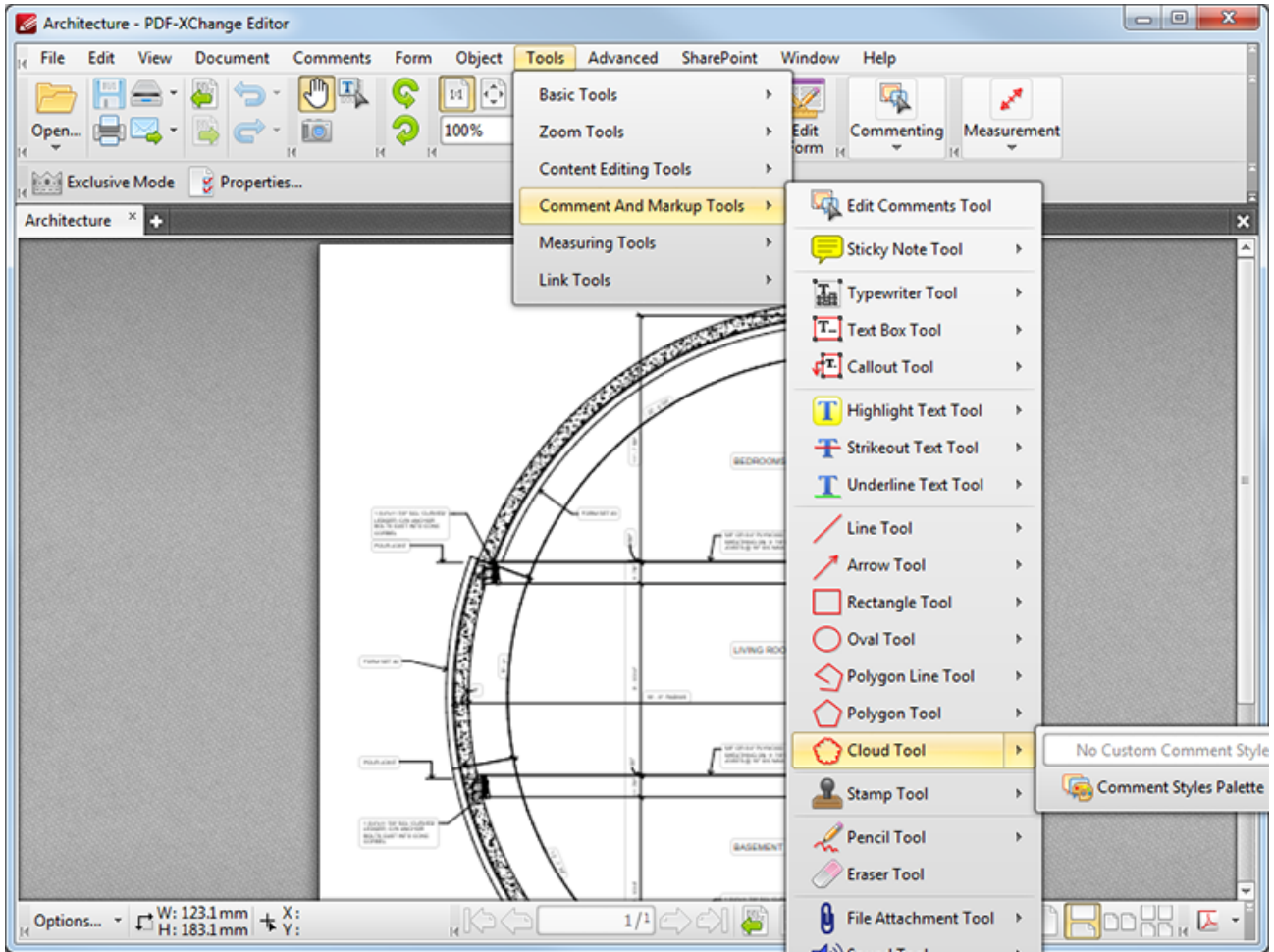
Figure 1. Tools Tab Submenu. Cloud Tool

When the **Cloud Tool** is selected, the pointer will be replaced with 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. Detailed below are examples of the tool:
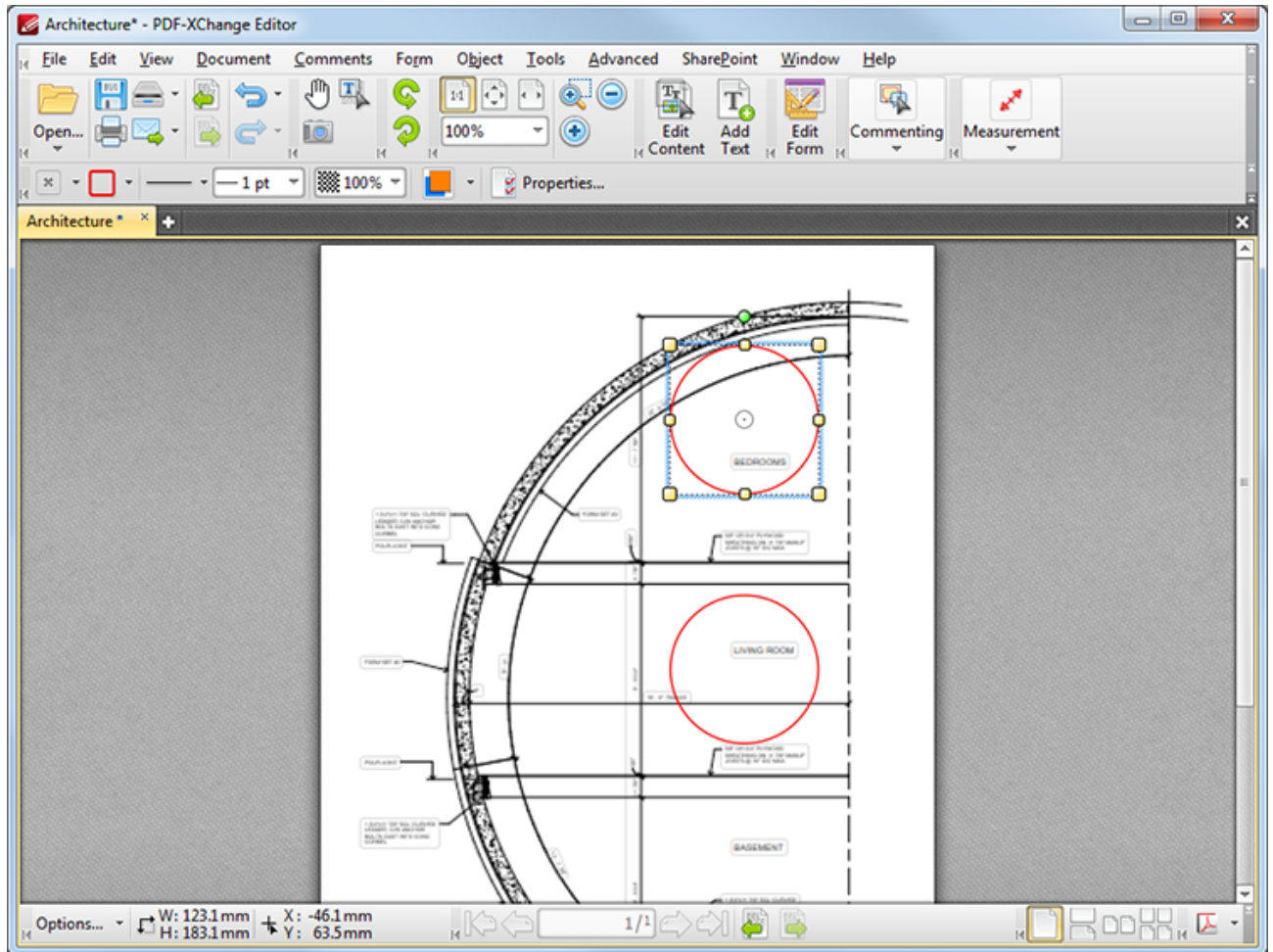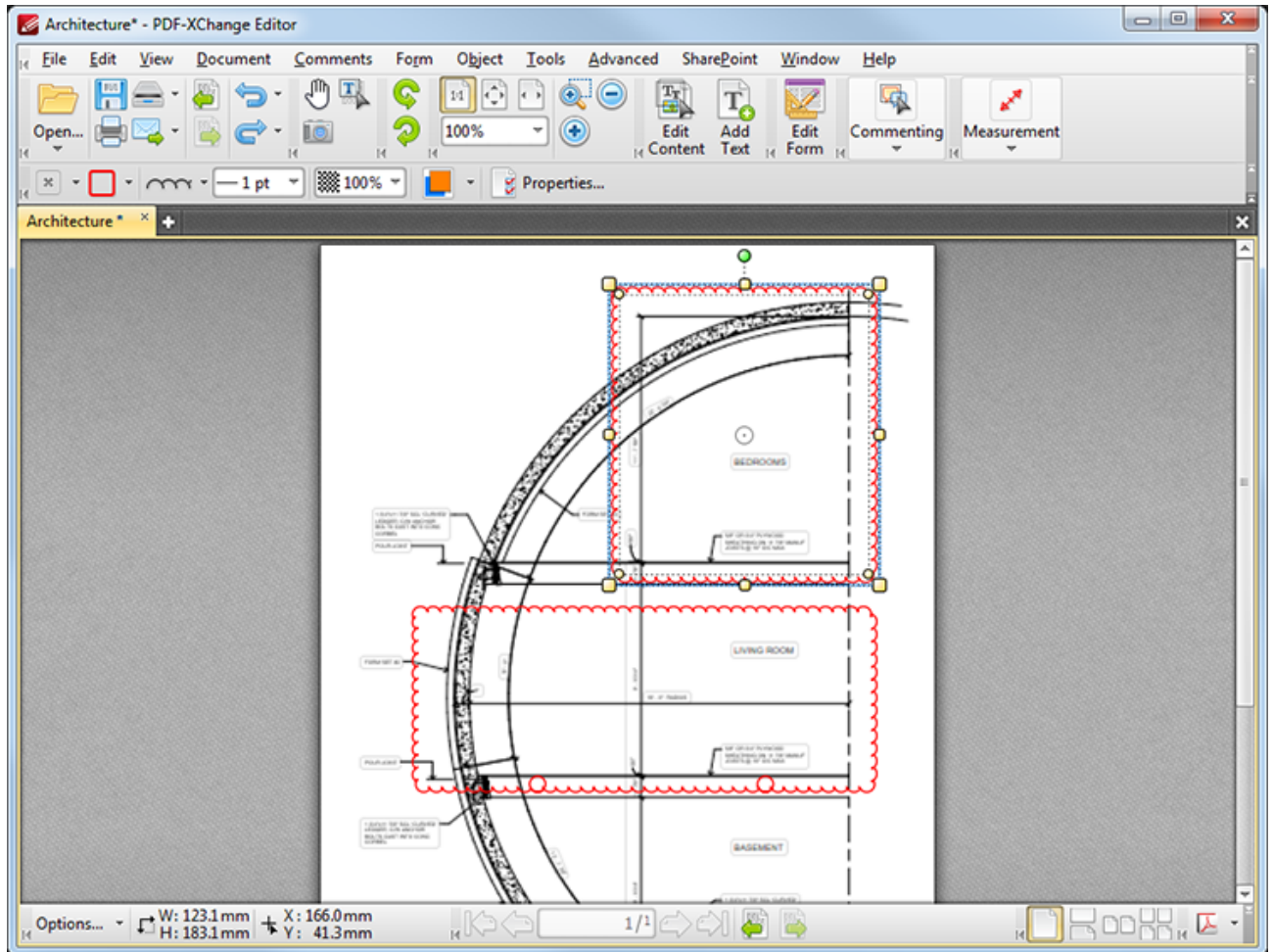
Figure 2. Cloud Tool Example

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.
- Use the editing aids detailed **here** 525 to assist in the precise placement of cloud annotations.
- Right-click cloud annotations for further options. See **here** 865 for an explanation of these options.
- When the **Cloud Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
    - **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 the manner in which cloud annotations blend with underlying content. These options are explained **here.** ⁷⁹⁴
- **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 standard manner.
- Click **Properties** to view/edit the **Cloud Tool Properties** pane. See **here** ⁸⁶⁹ for information on tool properties.
- The **Commenting** ²⁷⁵ section of the **Preferences** ²²⁹ dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** ⁶²⁵ can be used to save customized cloud annotation styles for subsequent use. Right-click the **Cloud** icon in the **Commenting Toolbar** ⁴⁷¹ to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.15 Stamp Tool

Stamp Tool

Click **Stamp Tool** to add stamps to documents:
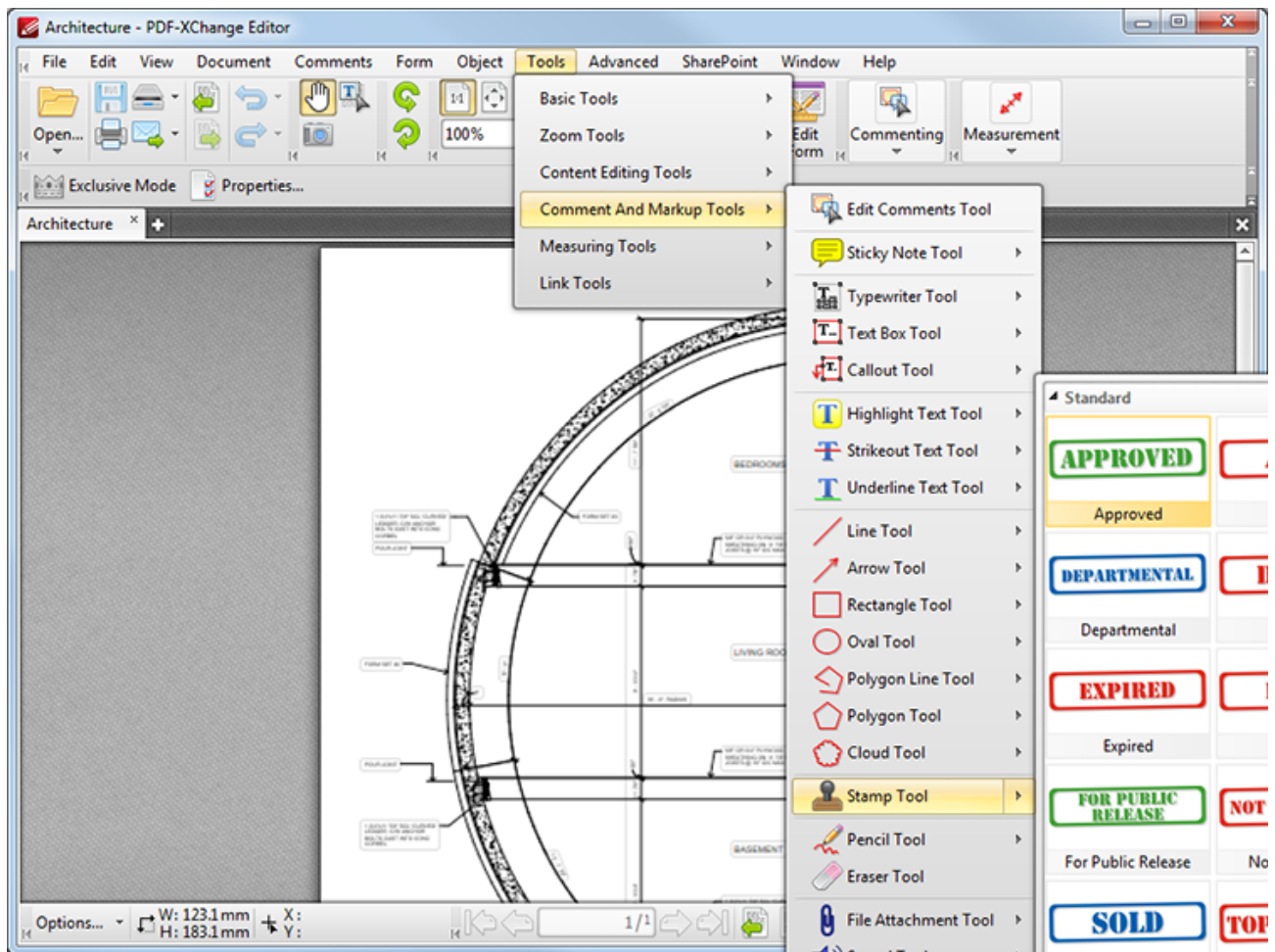
Figure 1. Tools Tab Submenu. Stamp Tool

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:
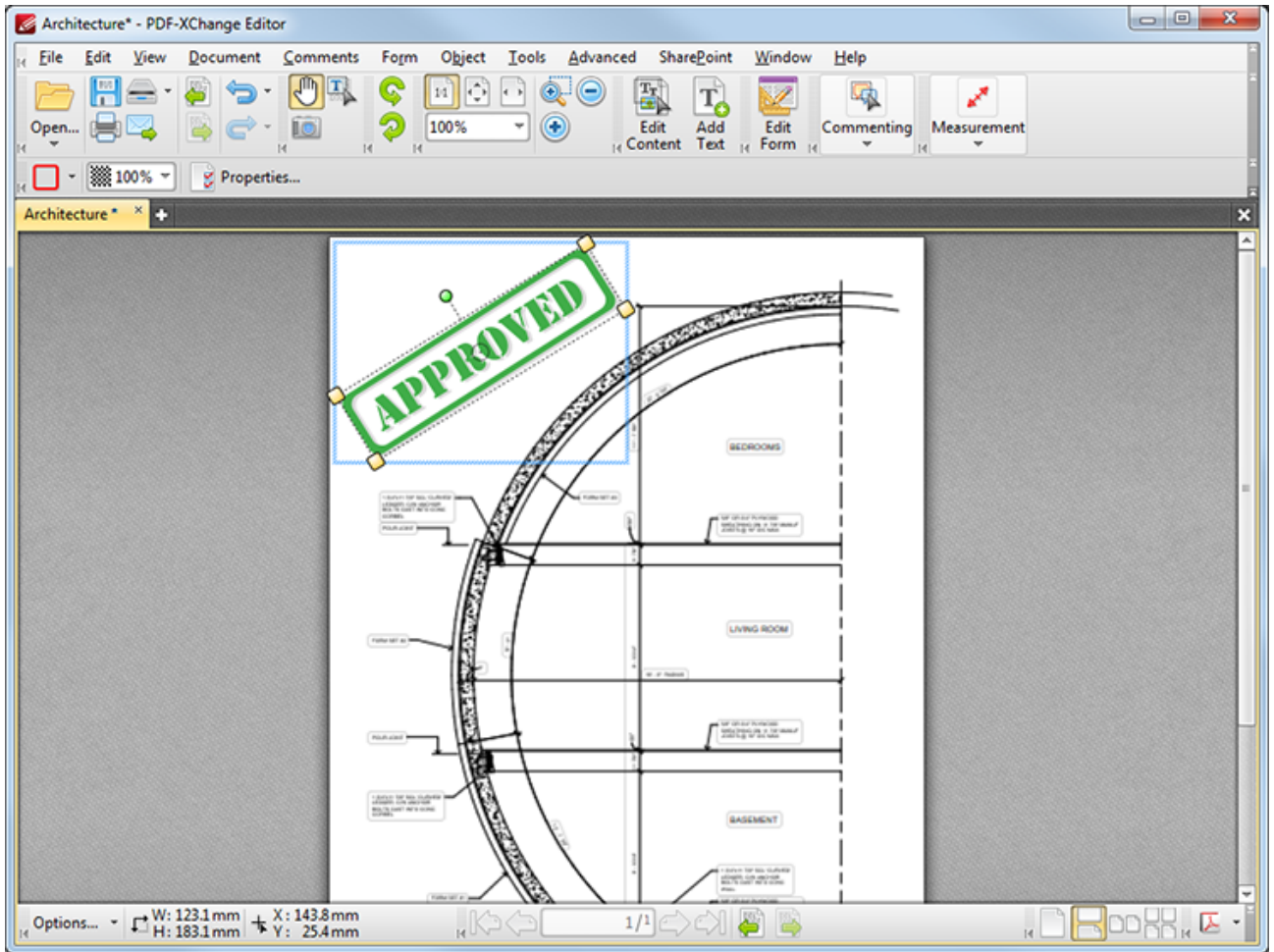
Figure 2. Sample Stamp

- 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.
- Use the editing aids detailed **here** ⌐525⌐ to assist in the precise placement of stamps.
- Right-click stamps for further options. See **here** ⌐865⌐ for an explanation of these options.
- When the **Stamp Tool** is selected, the following options are enabled in the **Properties Toolbar:** ⌐484⌐
  - **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 standard manner.
- Click **Properties** to view/edit the **Stamp Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.

Click the arrow beneath the **Stamp** icon in the **Shortcut Toolbar** 301 to access the **Stamps** pane, which details all default and custom stamps:

Figure 3. 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:
  - Use the **Zoom In** and **Zoom Out** icons to zoom in on/out from available stamps.
  - Click **New from File** to create a new stamp. The **Open Files** dialog box will launch. Select a file from the local computer. The dialog box displayed in *(figure 4)* will launch.
  - Click **New From Clipboard** to create a stamp from the image currently located on the clipboard of the local computer.
  - Click **Rename** to rename the stamp currently selected. (This option is not available for default stamps).
  - Click **Delete** to delete the stamp currently selected. (This option is not available for default stamps).
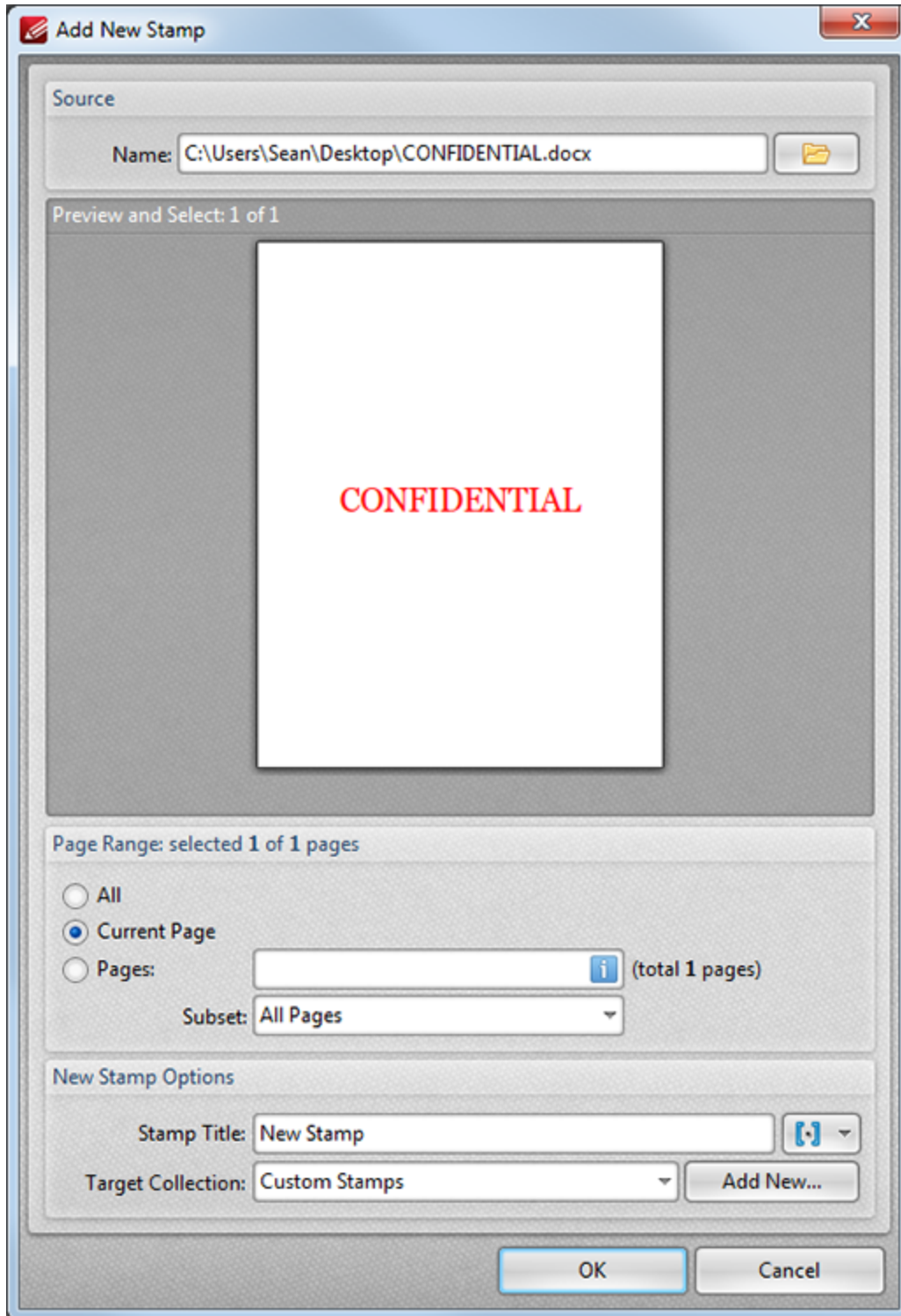
Figure 4. Add New Stamp Dialog Box

- Use the **Source** menu, or click the folder icon, to select a file to use as the stamp.
- The **Pages Range** options determine the pages of the file that will be used for the stamp:
  - Select **All** to use all the pages of the file.
  - Select **Current Page** to use only the current page.

- Select **Pages** to specify pages from the file. See **here** 860 for further information.
- If more than one page is selected then a new stamp will be created for each page.
- Enter a name of the new stamp in the **Stamp Title** text box. **Macros** 830 can be included in the stamp title.
- Use the **Target Collection** menu to determine the collection to which the new stamp will belong. Alternatively, click **Add New** to create a new collection.
- When the desired details have been selected, click **OK** to create the new stamp.

Please note the following when creating stamps:

- 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 do. **GIMP** is one such program. 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. Please note that content must be flattened before it can be used as a stamp. Right-click content and then click **Flatten** in order to flatten it.

If **PDF-XChange Editor Plus** has been purchased, then the additional features below are also available:

Add Dynamic Elements to Stamps

JavaScript can be included in stamps to add dynamic elements. Follow the steps below to achieve this:

1. Move to the **Stamps Palette** as detailed above.

2. Click **New From File:**
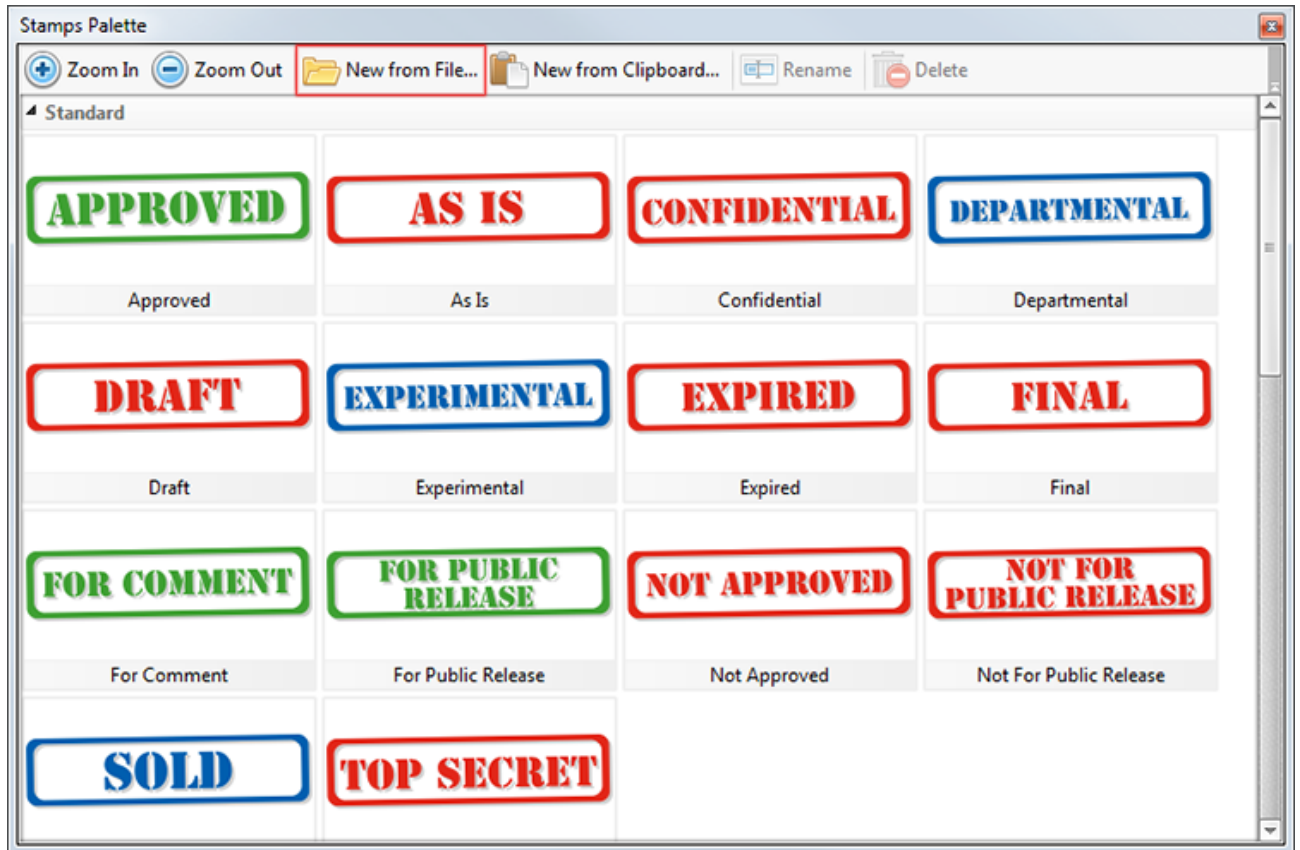
3. Select the file that will be used to create the stamp.

4. Follow the steps outlined beneath *(figure 4)* to create and save a new stamp.

5. Close **PDF-XChange Editor Plus.**

6. Move to the stamp within its destination folder on the local computer. Please note that the default folder is **C:\Users\<User>\AppData\Roaming\Tracker Software\PDFXEditor\3.0\Stamps.**

7. Move the stamp to the desktop. (This is a necessary step due to encoding parameters - if it is not included then changes cannot be saved).

8. Open the stamp with **PDF-XChange Editor Plus.**

9. Use the **Form Toolbar** 320 to add a text field to the stamp.

10. Right-click the text field and click **Properties.** The **Properties** pane will open.

11. 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:
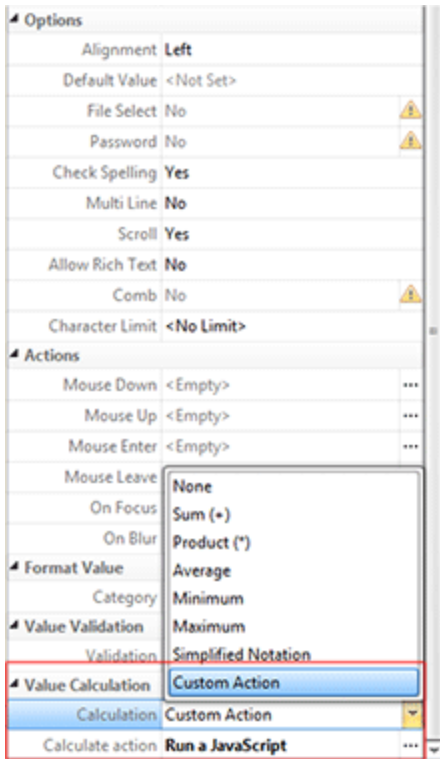
12. Click the ellipsis icon on the right of the **Calculate action / Run a JavaScript** property. The **Edit Action: "Run a JavaScript"** dialog box will open.

13. Enter the desired JavaScript and click **OK.**

14. Save the file and close **PDF-XChange Editor Plus.**

15. Return the stamp to its original destination folder. It will then be available in the specified stamp collection.

For example, entering the following JavaScript returns the user name/PC name at the time that associated stamps are created:

    if((identity.name != null) && !/^\s*$/.test(identity.name))
    event.value = identity.name;
    else
    event.value = identity.loginName.replace(/\./g," ").replace(/\./g,"
    ").replace(/\b(\w)/g,function(Word,cFst){return
    cFst.toUpperCase()});

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 can include form field elements. The barcode and text field 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 thirteen:

```
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 Plus.**

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 Plus** 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 Plus.**

10. Move the stamp from its destination folder to the desktop.

11. Open **PDF-XChange Editor Plus** and open the stamp.

12. Select **Edit Form** in the **Form Toolbar** 320 and 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 Plus.**

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.**

6.7.4.16 Pencil Tool

Pencil Tool

Click **Pencil Tool** to add freehand annotations to documents:
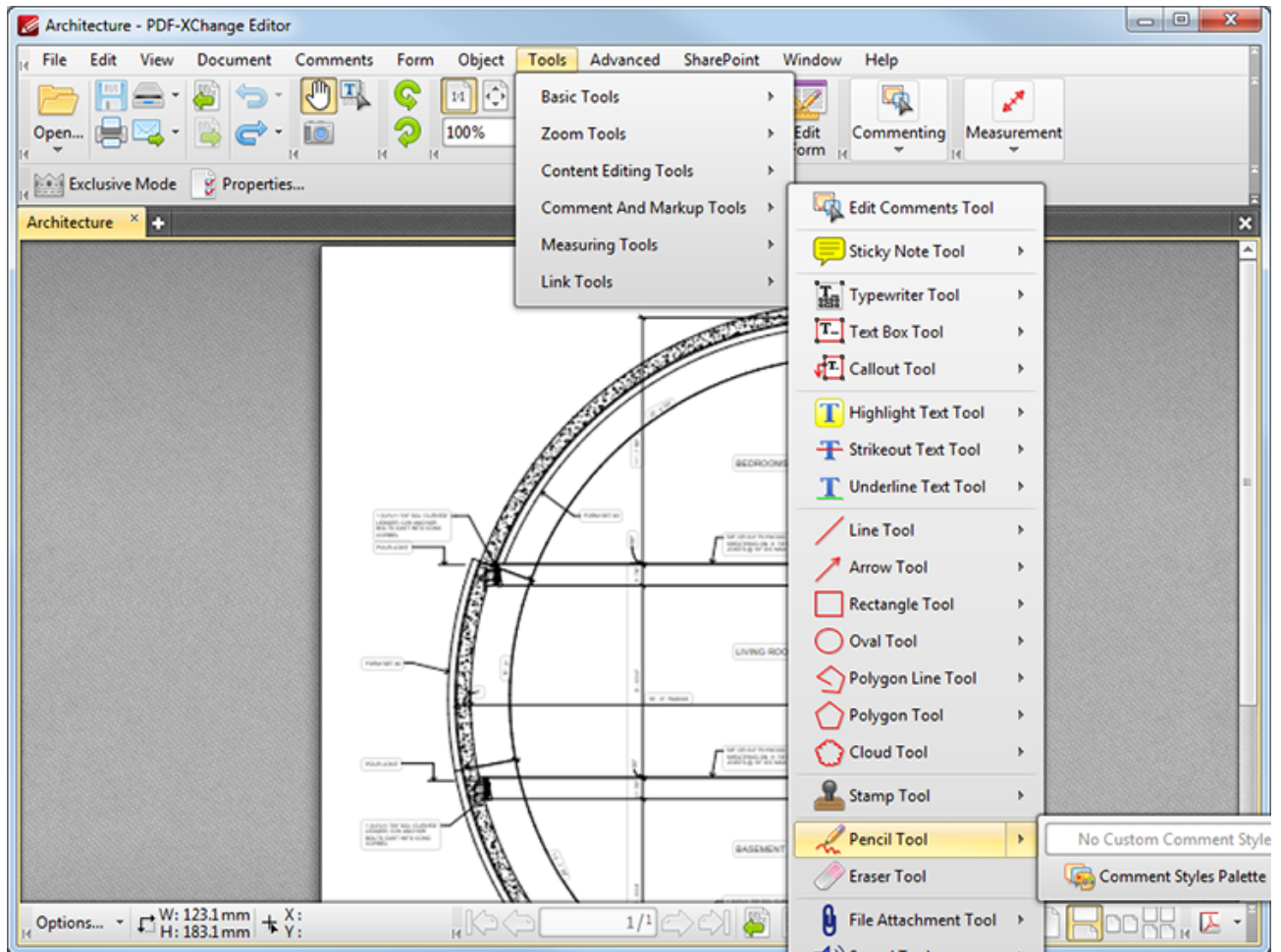
Figure 1. Tools Tab Submenu. Pencil Tool

When the **Pencil Tool** is selected, click and drag the pointer to create freehand annotations:
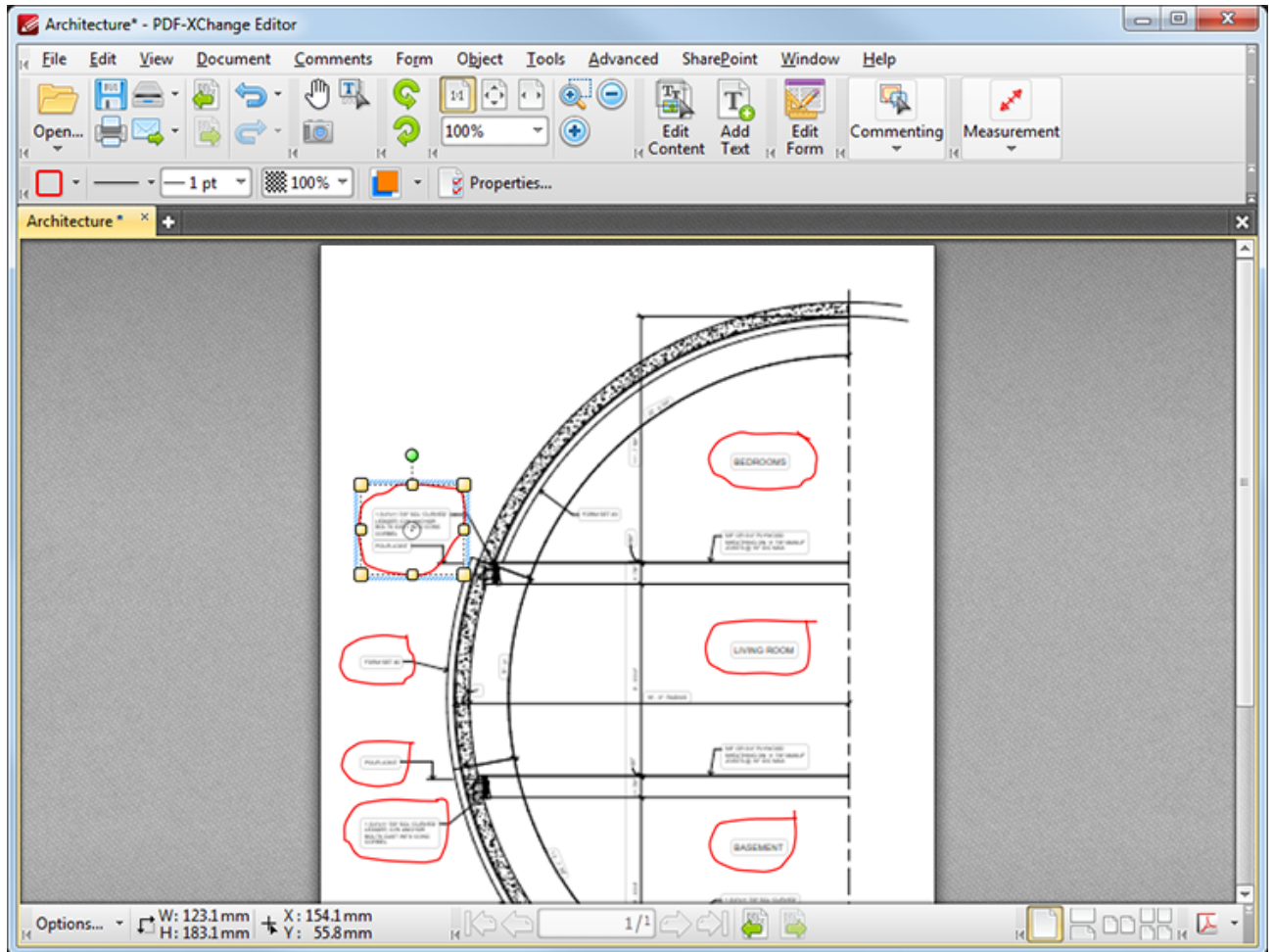
Figure 2. Pencil Tool Example

- Click to select completed freehand 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 freehand annotations.
- Click and drag freehand 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 freehand annotations. Hold down Shift to rotate at increments of fifteen degrees.
- Use the arrow keys to reposition freehand annotations.
- Use the editing aids detailed **here** 525 to assist in the precise placement of document content.
- Right-click freehand annotations for further options. See **here** 865 for an explanation of these options.
- When the **Pencil Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
    - **Stroke Color** determines the color of freehand annotations.
    - **Border Style** determines the style of freehand annotations.
    - **Border Width** determines the width of freehand annotations.
    - **Opacity** determines the level of transparency in freehand annotations.

- **Blend Mode** determines the manner in which freehand annotations blend with underlying content. These options are explained **here.** 794
- **Keep Selected** determines whether or not the **Pencil Tool** remains selected after a freehand annotation has been created. If this option is enabled then the tool will remain selected and can be used to create several freehand annotations consecutively. If this option is not enabled then **PDF-XChange Editor** will revert to the designated default tool immediately after creating a freehand 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 freehand 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 standard manner.
- Click **Properties** to view/edit the **Pencil Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Commenting** 275 section of the **Preferences** 229 dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** 625 can be used to save customized pencil line styles for subsequent use. Right-click the **Pencil** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

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:** 484

- **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** 869 for information on tool properties.

6.7.4.17   File Attachment Tool

File Attachment Tool

Click **File Attachment Tool** to create links to files within documents:
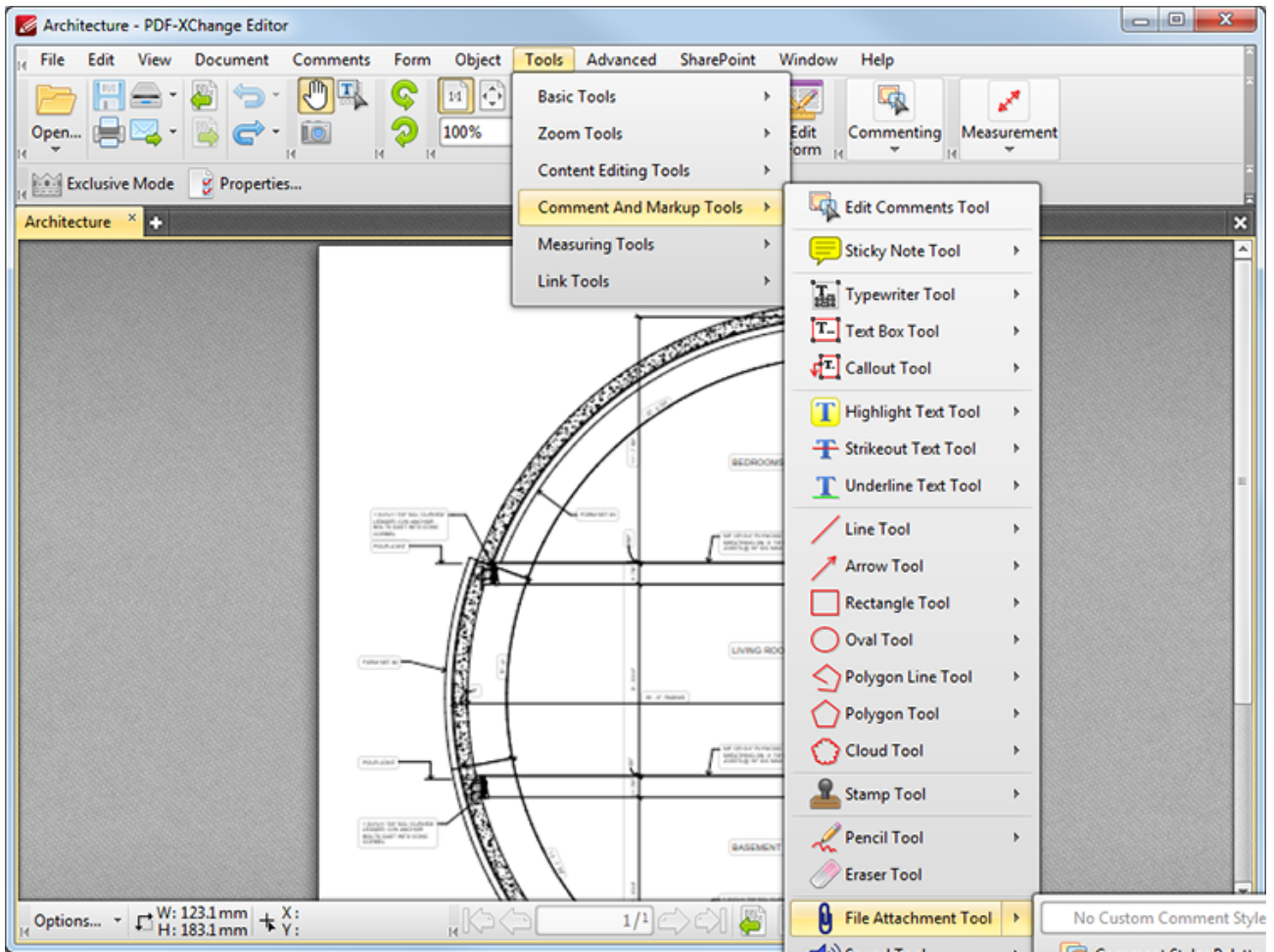
Figure 1. Tools Tab Submenu. File Attachment Tool

When the **File Attachment Tool** is selected, the pointer will be replaced with a crosshairs icon. Move the icon to the location at which the link is to be created. Then click to open the **Open Files** dialog box. Select the desired file and click **Open.** The link to the attached file will appear in the active document:
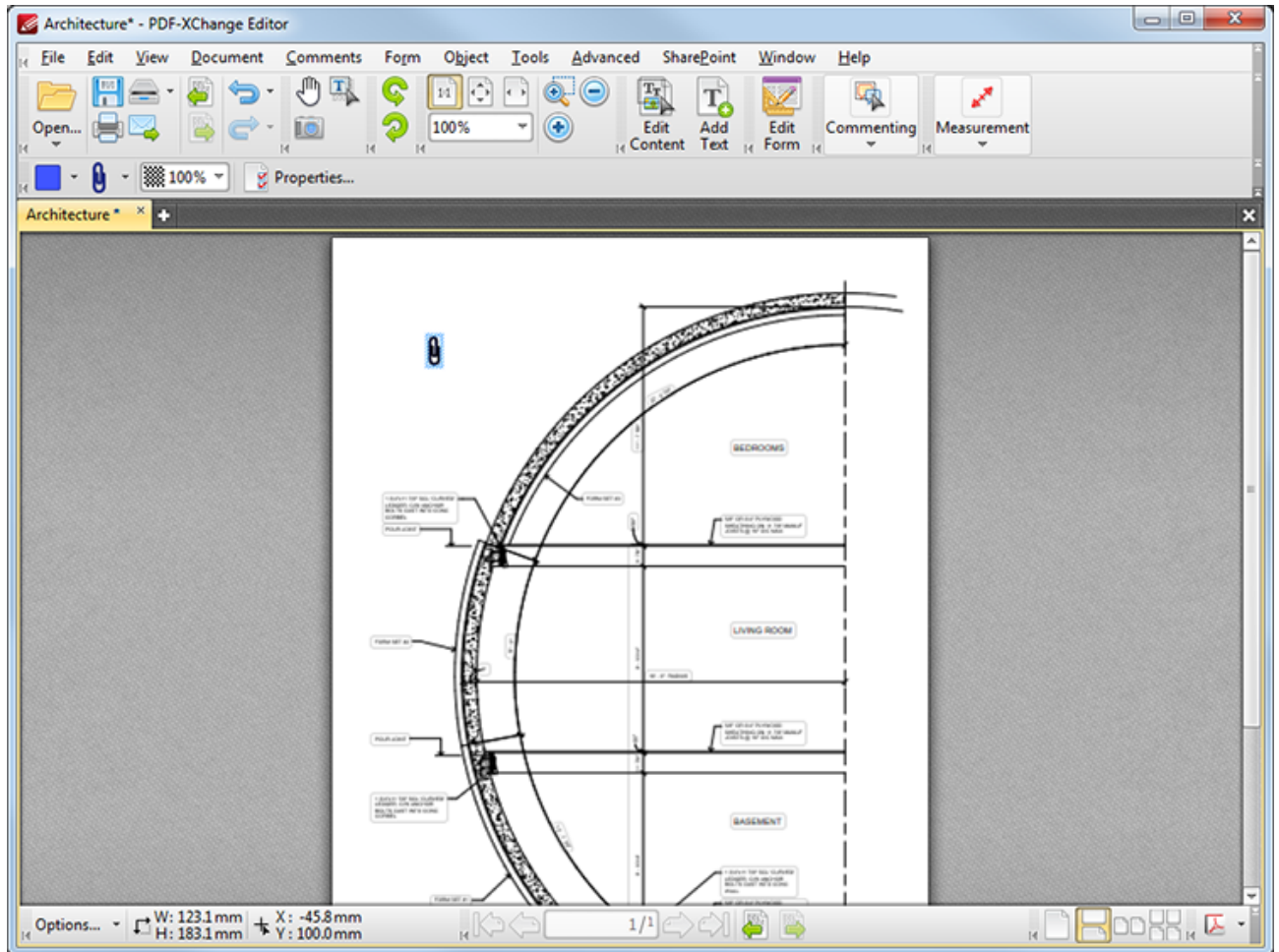
Figure 2. File Attachment Tool Example

- Click and drag the file attachment icon to reposition it. Alternatively, the arrow keys can be used for this purpose.
- Double-click the file attachment icon to open the attached file.
- Right-click file attachment icons for further options. See **here** [865] for an explanation of these options.
- When the **File Attachment Tool** is selected, the following options are enabled in the **Properties Toolbar:** [484]
  - **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 standard manner.
- Click **Properties** to view/edit the **File Attachment Tool Properties** pane. See **here** ⌐869⌐ for information on tool properties.
- The **Commenting** ⌐275⌐ section of the **Preferences** ⌐229⌐ dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** ⌐625⌐ can be used to save customized file attachment styles for subsequent use. Right-click the **Attach File** icon in the **Commenting Toolbar** ⌐471⌐ to view existing styles and/or access the **Comment Styles Palette.**

6.7.4.18 Sound Tool

 Sound Tool

Click **Sound Tool** to add audio content to documents:
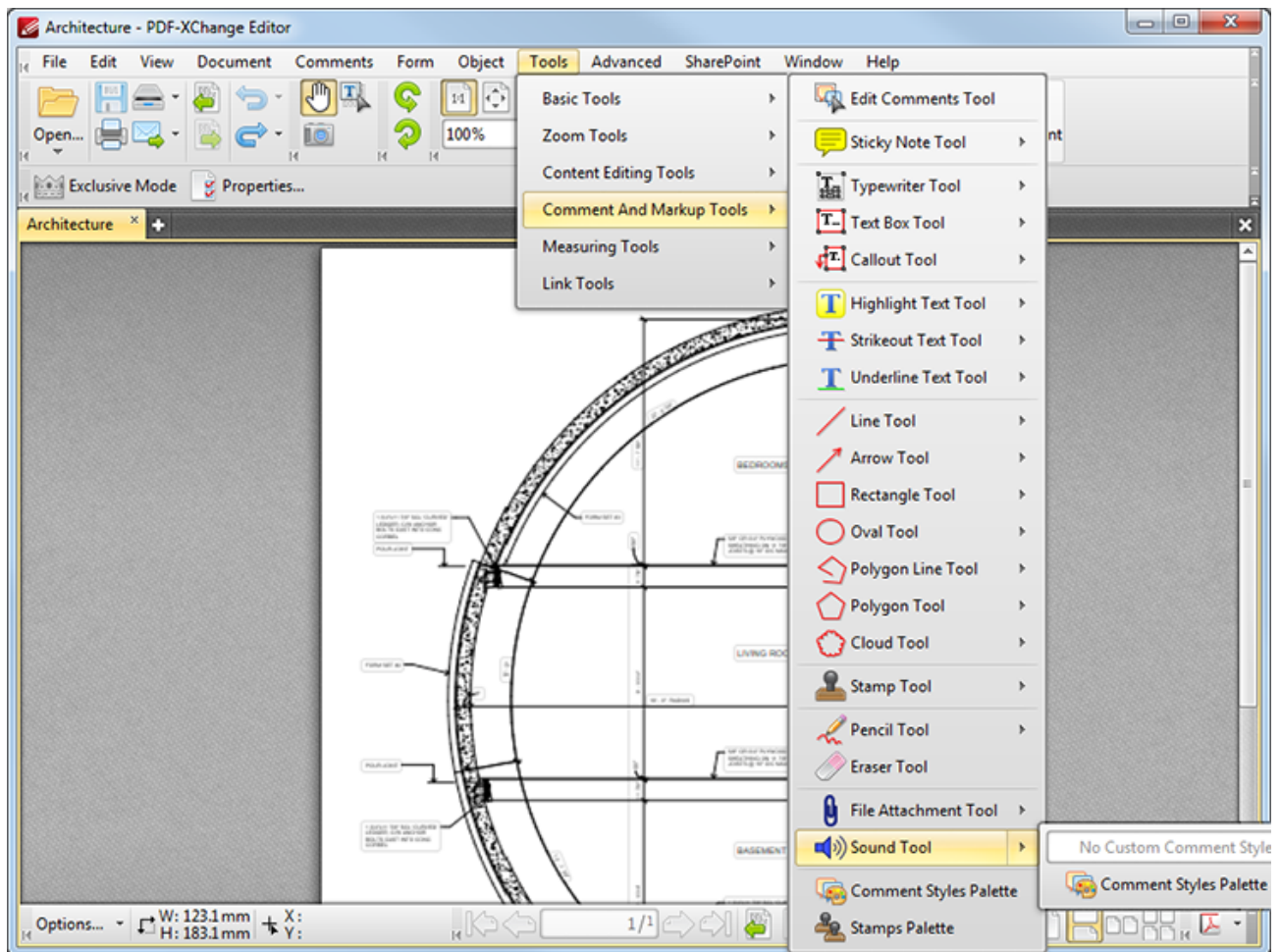
Figure 1. Tools Tab Submenu. Sound Tool

When the **Sound Tool** is selected, the pointer will become a crosshairs icon. Move the icon to the desired location and click to open the **Edit Action: "Play a Sound"** dialog box:
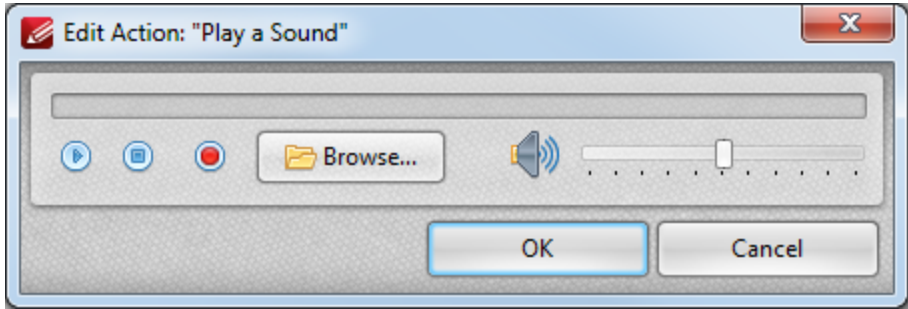
Figure 2. Edit Action: "Play a Sound" Dialog Box

- 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)* below. The selected sound file will play when the link is clicked.
- Alternatively, click the red record button to record a sound with a microphone. 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. When the desired sound has been recorded click **OK.** A link will appear in the document as detailed in *(figure 3)***:**
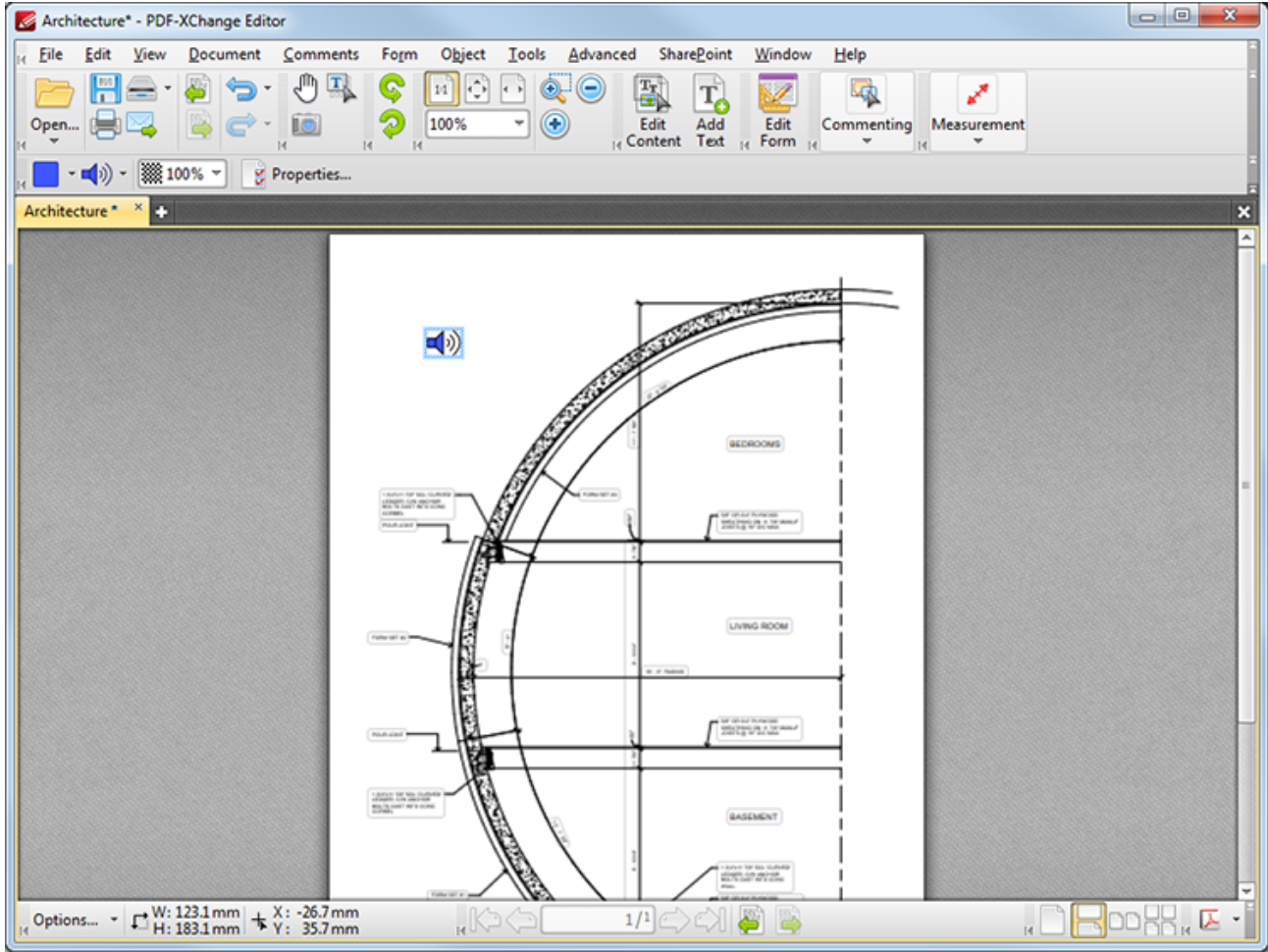
Figure 3. Sound Tool Example

- Click and drag the icon to reposition it. Alternatively, the arrow keys can be used for this purpose.
- Double-click icons to open the associated sound file.
- Right-click icons for further options. See **here** [865] for an explanation of these options.
- When the **Sound Tool** is selected, the following options are enabled in the **Properties Toolbar:** [484]
    - **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 standard manner.
    - Click **Properties** to view/edit the **Sound Tool Properties** pane. See **here** [869] for information on tool properties.
- The **Commenting** [275] section of the **Preferences** [229] dialog box can be used to view/edit preferences for comments.
- The **Comment Styles Palette** [625] can be used to save customized sound tool styles for subsequent use. Right-click the **Sound** icon in the **Commenting Toolbar** [471] to view existing styles and/or access the **Comment Styles Palette.**

6.7.5 Measuring Tools

Measuring Tools

Hover over **Measuring Tools** to open the following submenu:
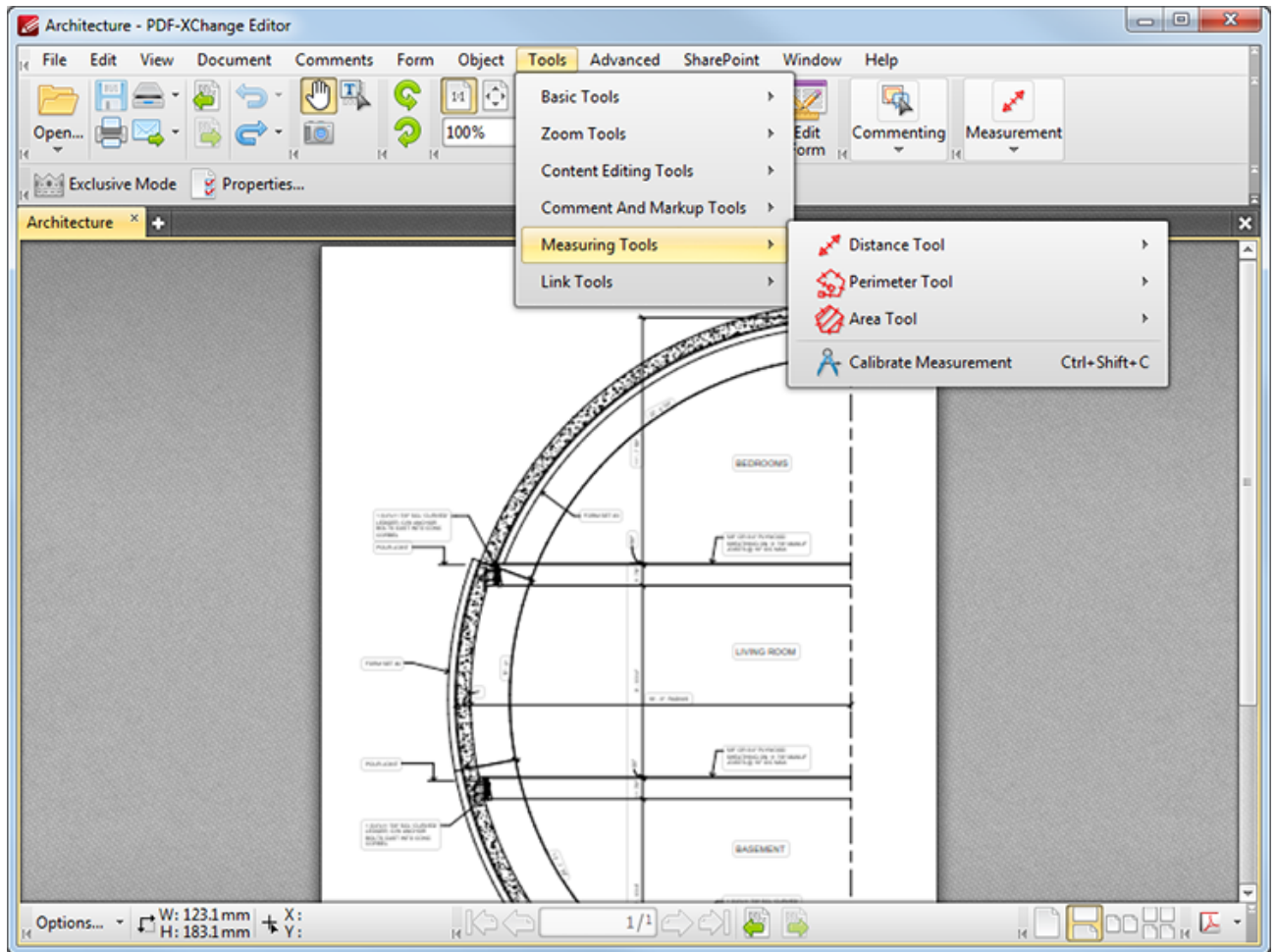
Figure 1. Tools Tab Submenu. Measuring Tools

The measuring tools are used to measure specific document dimensions:

- The **Distance Tool** is used to measure the distance between two points. See **here** 725 for further information.

- The **Perimeter Tool** is used to measure the distance between multiple points. See **here** 728 for further information.
- The **Area Tool** is used to measure the area within designated lines. See **here** 731 for further information.
- The **Calibrate Measurement** option is used to determine scales for use in conjunction with the measuring tools. See **here** 734 for further information.

6.7.5.1 Distance Tool

Distance Tool

Click **Distance Tool** to measure the distance between two points:

Figure 1. Tools Tab Submenu. Distance Tool

When the **Distance Tool** is selected the pointer will become a crosshairs icon. Click to designate a starting point from which to measure. 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 location to which the measurement is to be made. The distance from the first point will be displayed as the pointer

is moved. Further details are available in the information box. Click to determine the measured distance. The baseline is then established. Click again to set the baseline as the final distance to be measured. Alternatively, move the pointer either up or 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:
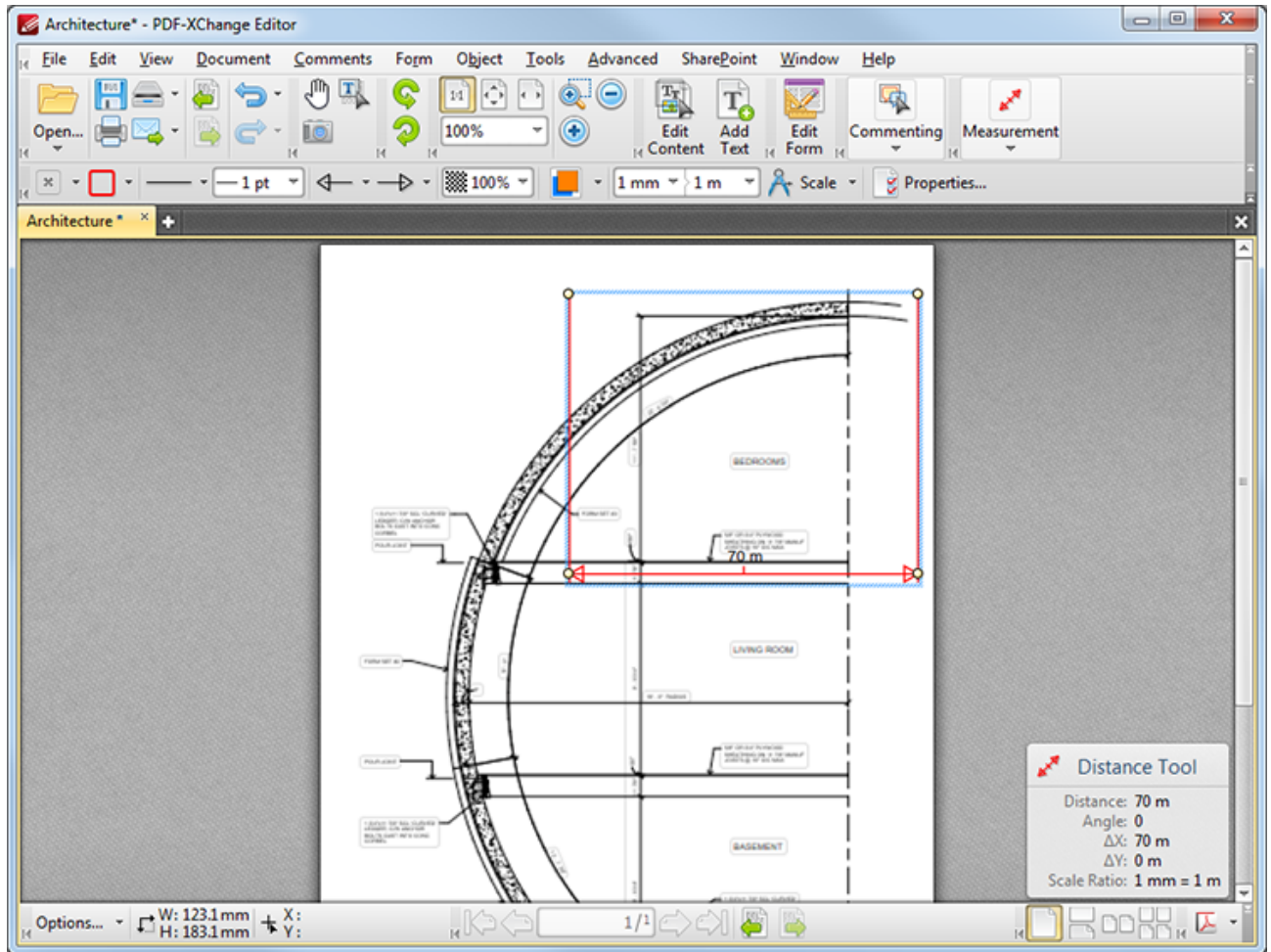
Figure 2. Distance Tool Example

- The **Distance Tool** calculates and displays distances measured according to the active scale. The **Scale** option in the **Properties Toolbar** 484 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.
- Use the editing aids detailed **here** 525 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** 865 for an explanation of these options.
- When the **Distance Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
  - **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 the manner in which lines blend with underlying content. These options are explained **here.** 794
  - 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.** 734
  - **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 standard manner.
  - Click **Properties** to view/edit the **Distance Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Comment Styles Palette** 625 can be used to save customized distance line styles for subsequent use. Right-click the **Distance Tool** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.5.2 Perimeter Tool

Perimeter Tool

Click **Perimeter Tool** to measure the distance between multiple points:
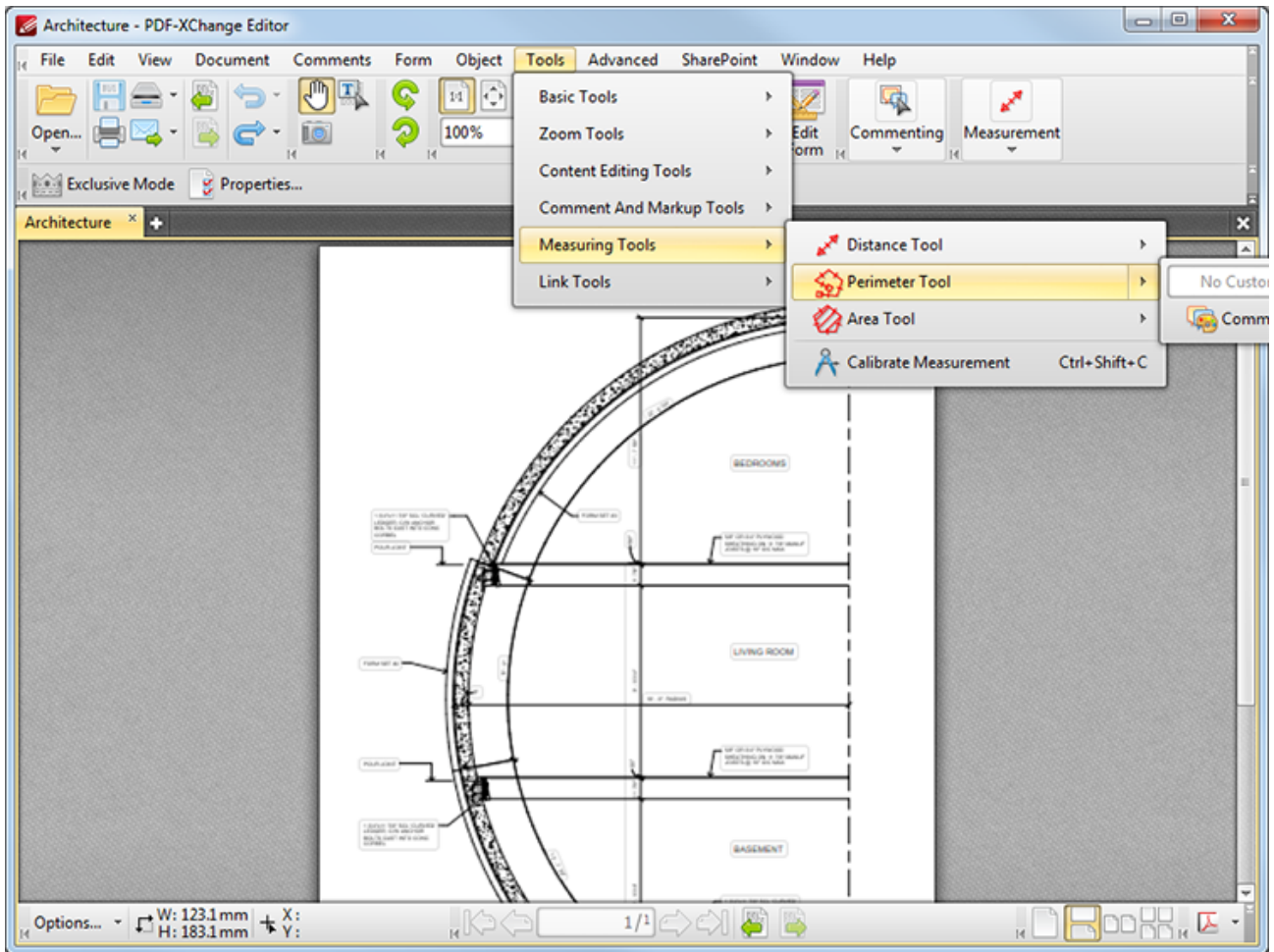
Figure 1. Tools Tab Submenu. Perimeter Tool

When the **Perimeter Tool** is selected the pointer will become 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:
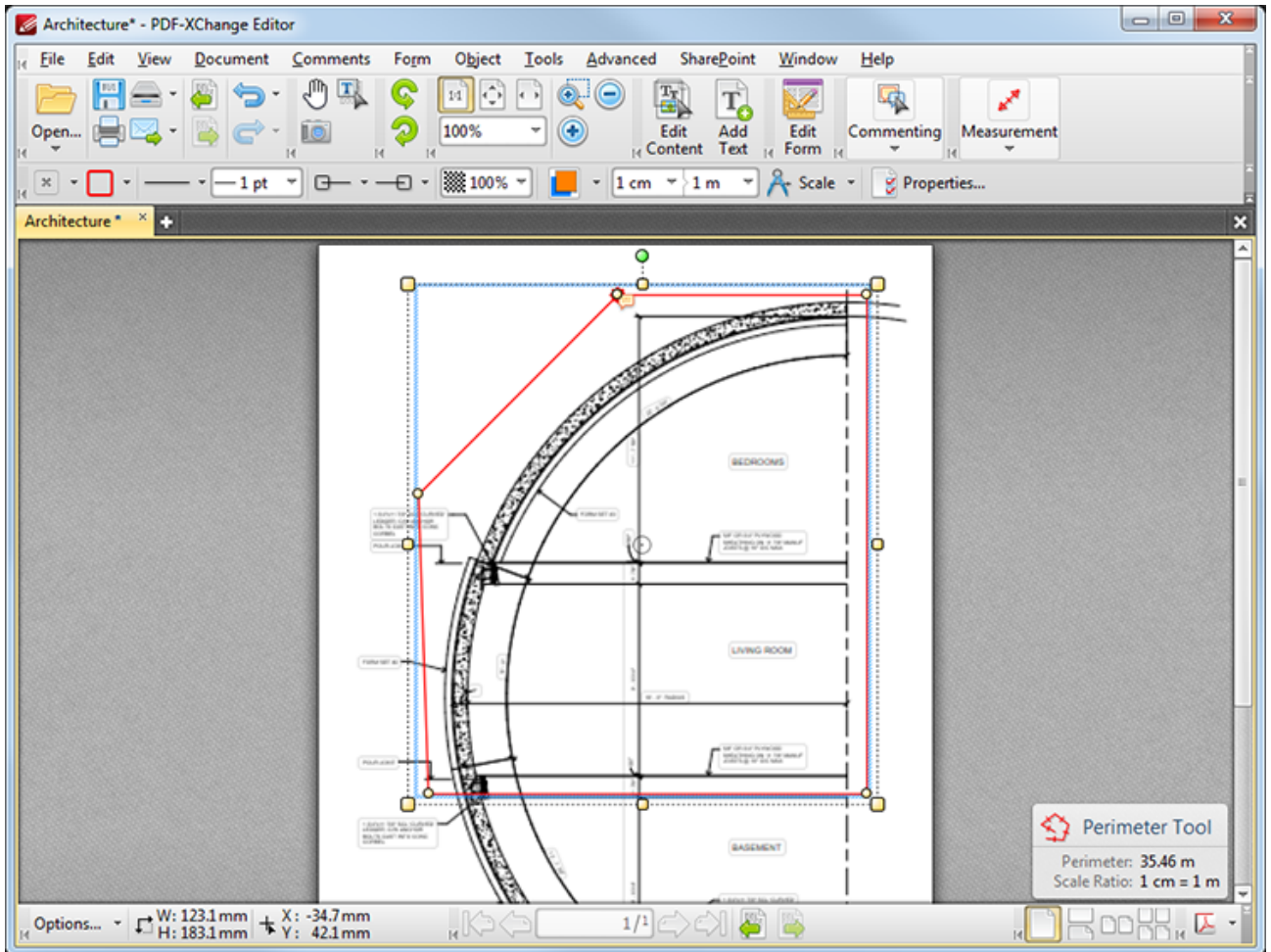
Figure 2. Perimeter Tool Example

- The **Perimeter Tool** calculates the distance measured according to the active scale. The **Scale** option in the **Properties Toolbar** 484 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.
- Use the editing aids detailed **here** 525 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** 865 for an explanation of these options.

- When the **Perimeter Tool** is selected, the following options are enabled in the **Properties Toolbar:** [484]
    - **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 the manner in which lines blend with underlying content. These options are explained **here.** [794]
    - 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.** [734]
    - **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 standard manner.
    - Click **Properties** to view/edit the **Perimeter Tool Properties** pane. See **here** [869] for information on tool properties.
- The **Comment Styles Palette** [625] can be used to save customized perimeter line styles for subsequent use. Right-click the **Perimeter Tool** icon in the **Commenting Toolbar** [471] to view existing styles and/or access the **Comment Styles Palette.**

6.7.5.3   Area Tool

Area Tool

Click **Area Tool** to measure the area within designated lines:
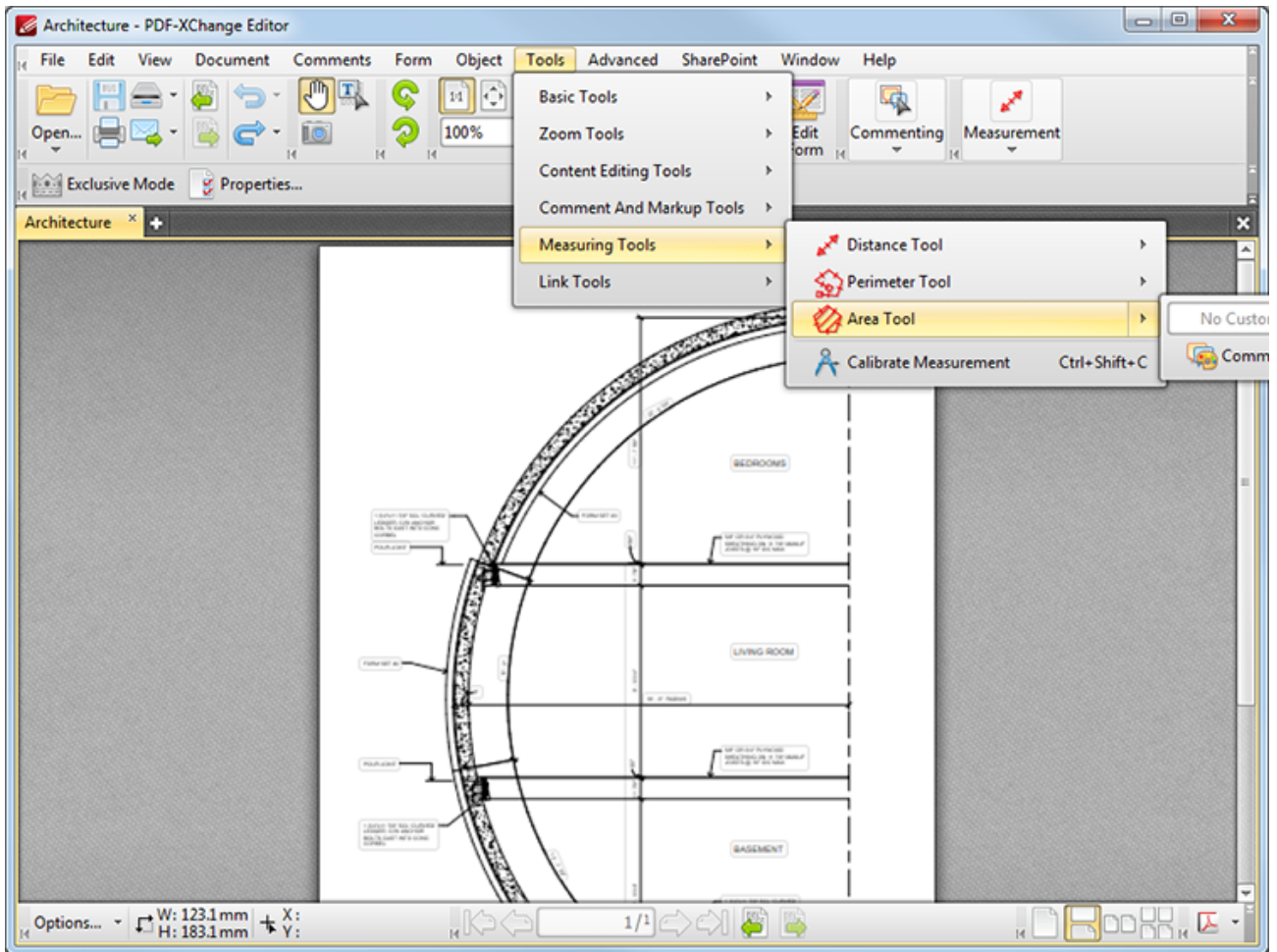
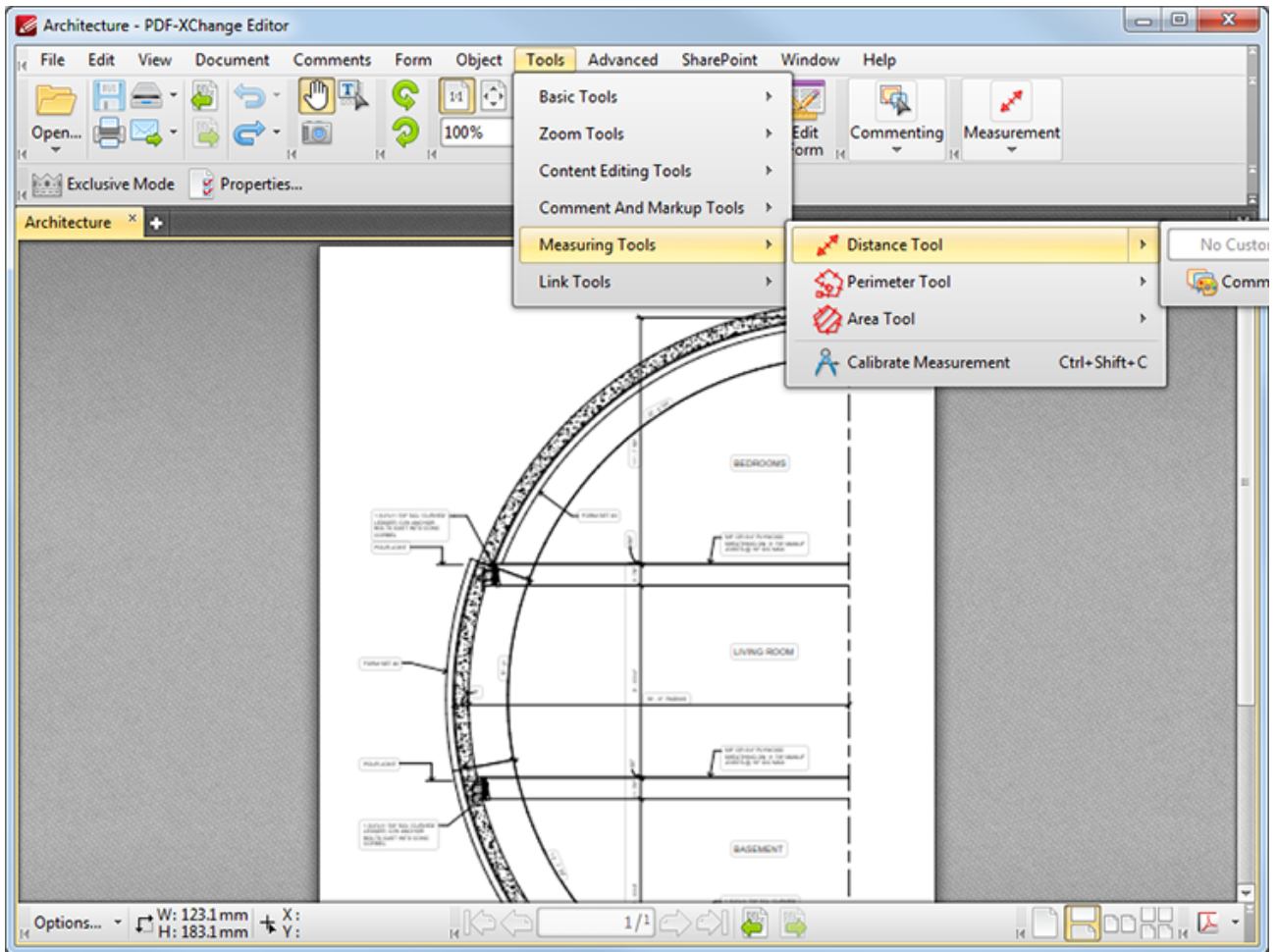**Figure 1.** Tools Tab Submenu. Area Tool

When the **Area Tool** is selected the pointer will become 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:
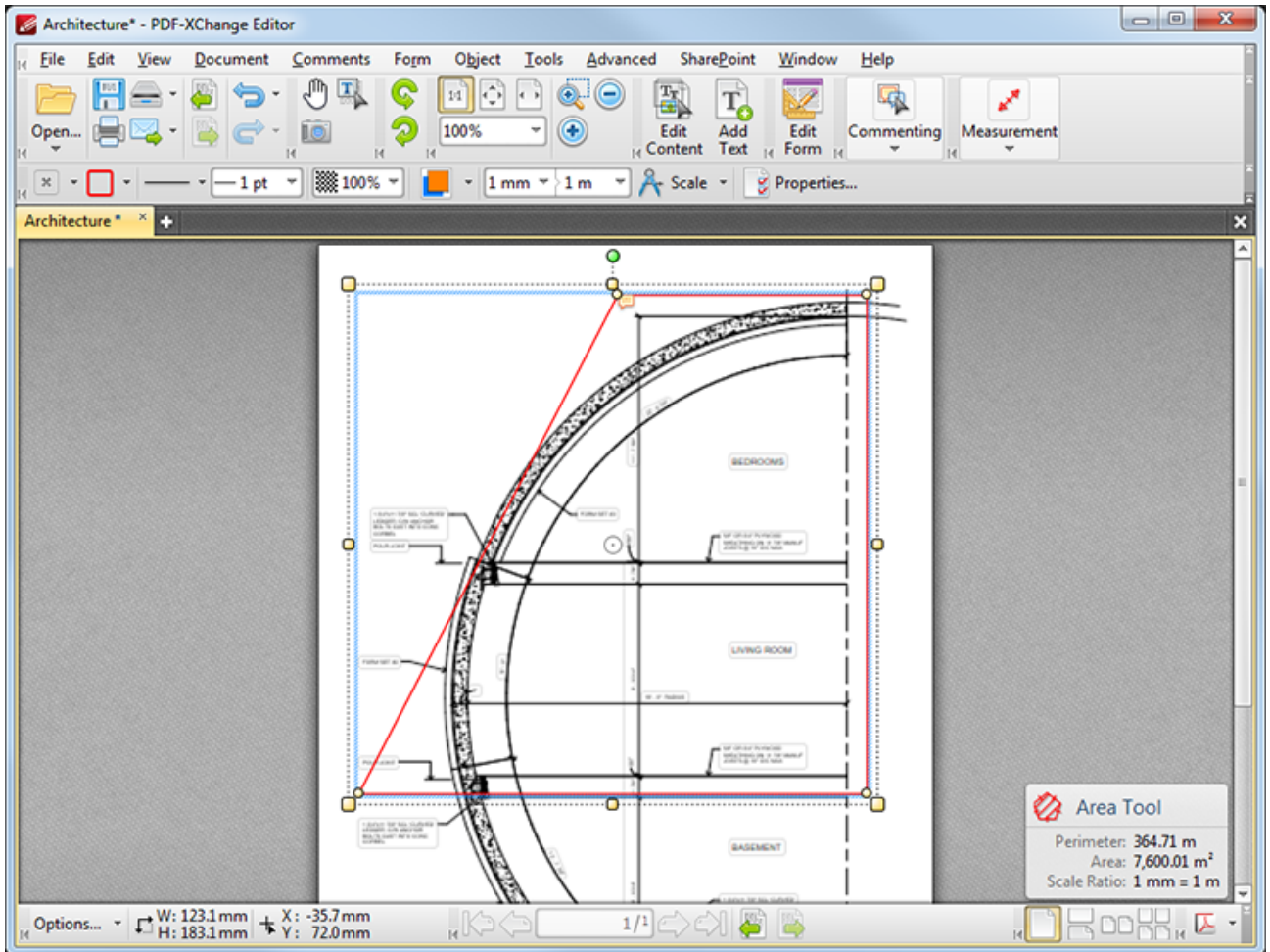
Figure 2. Area Tool Example

- The **Area Tool** calculates the distance measured and area according to the active scale. The **Scale** option in the **Properties Toolbar** 484 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.
- Use the editing aids detailed **here** 525 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** 865 for an explanation of these options.

- When the **Area Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
  - **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 the manner in which area shapes blend with underlying content. These options are explained **here.** 794
  - 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.** 734
  - **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 standard manner.
  - Click **Properties** to view/edit the **Area Tool Properties** pane. See **here** 869 for information on tool properties.
- The **Comment Styles Palette** 625 can be used to save customized area shape styles for subsequent use. Right-click the **Area Tool** icon in the **Commenting Toolbar** 471 to view existing styles and/or access the **Comment Styles Palette.**

6.7.5.4   Calibrate Measurement

 Calibrate Measurement

Click **Calibrate Measurement** to determine scales for use in conjunction with the measuring tools:
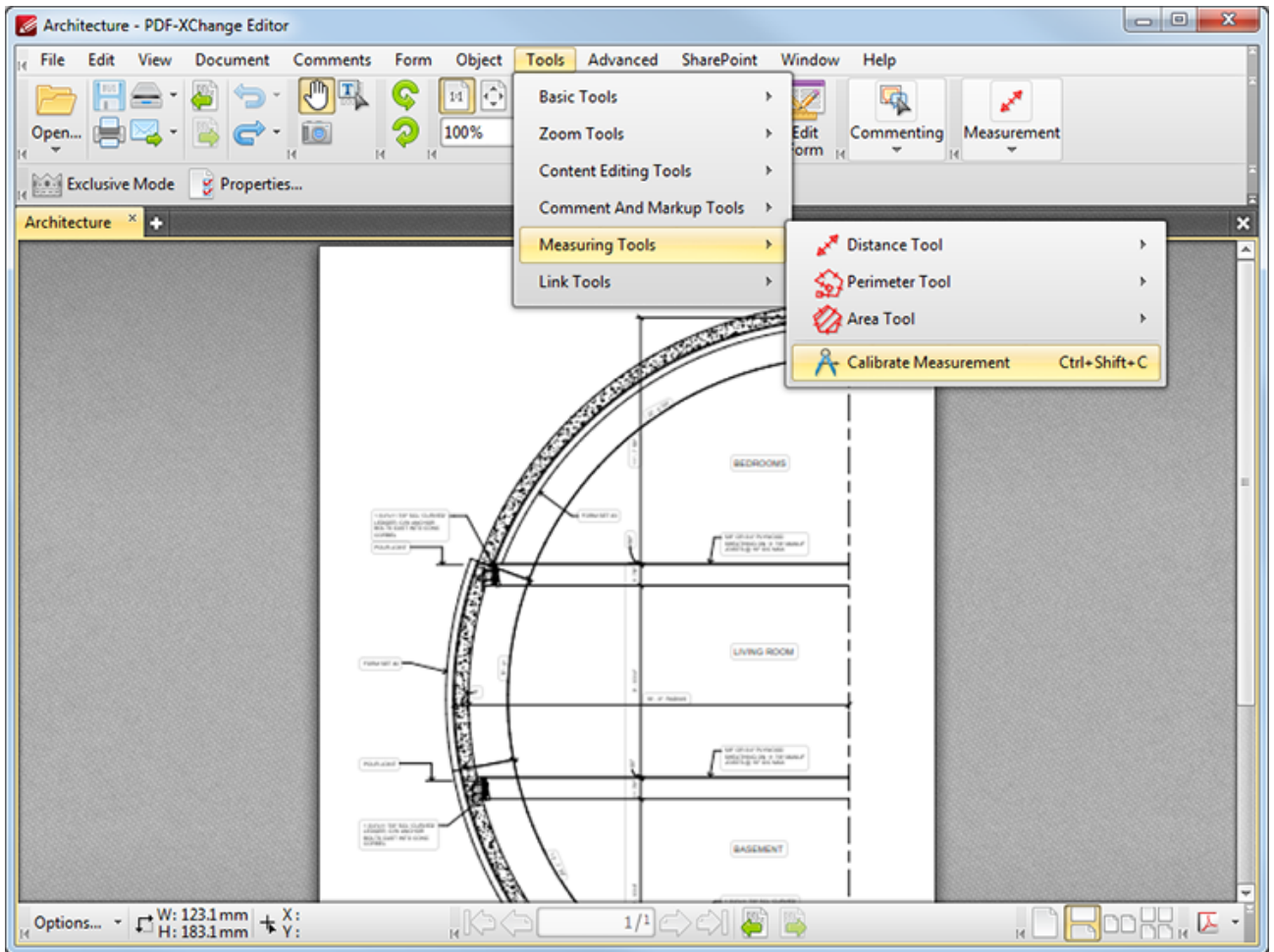
Figure 1. Tools Tab Submenu. Calibrate Measurement

When the **Calibrate Measurement** feature is enabled, the pointer will become a crosshairs icon. Click to determine the starting point of the distance to be calibrated. A blue line will appear within the document. Drag it to the point at which the distance to be calibrated finishes. The **Calibration** dialog box will open:
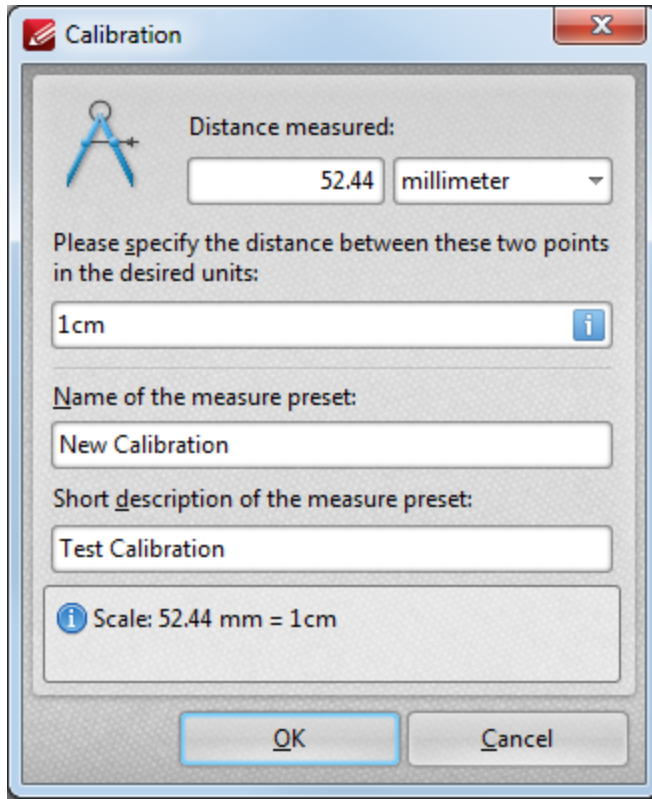
Figure 2. Calibration Dialog Box

- The distance determined in the step outlined above is detailed in the top number box. Select a unit of measurement from the list.
- Use the second number box to determine the scale. Enter a numerical amount followed by the desired unit of measurement for the scale.
- Name and describe the calibration.
- The scale is detailed in the lower box.
- Click **OK** to save the calibration.

When new calibrations have been determined, they can then be selected in the main window of **PDF-XChange Editor** when using the measurement tools. Click **Scale** in the **Properties Toolbar** 484 to select scales.

The keyboard shortcut to enable this feature is Ctrl+Shift+C.

6.7.6 **Link Tools**

Link Tools

The **Link Creation Tool** is the only option currently available in the **Link Tools** submenu:
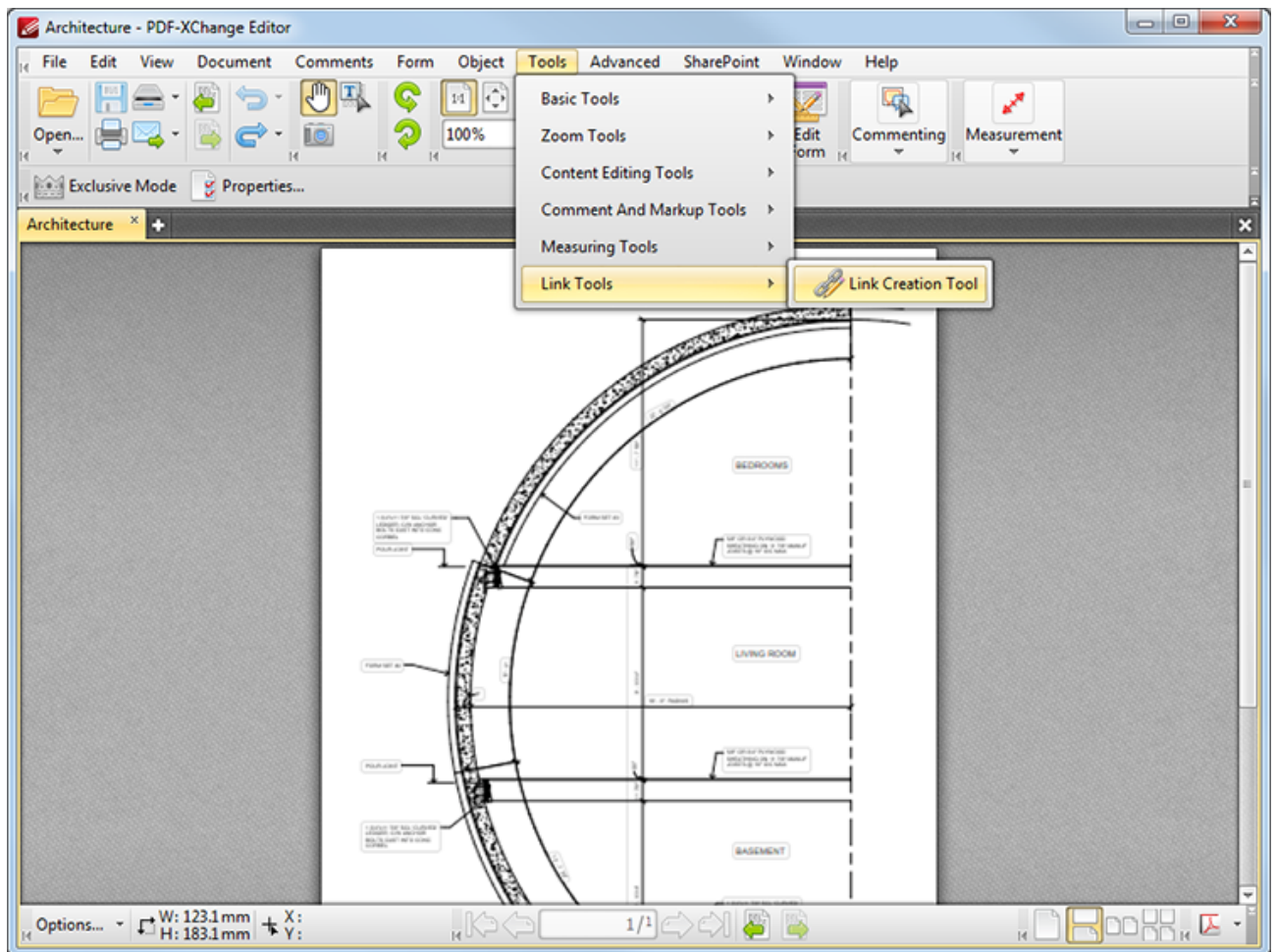
Figure 1. Tools Tab Submenu. Link Creation Tool

The **Link Creation Tool** is used to create links. When it is selected the pointer will become a crosshairs icon. Click and drag to determine the location and size of the link:
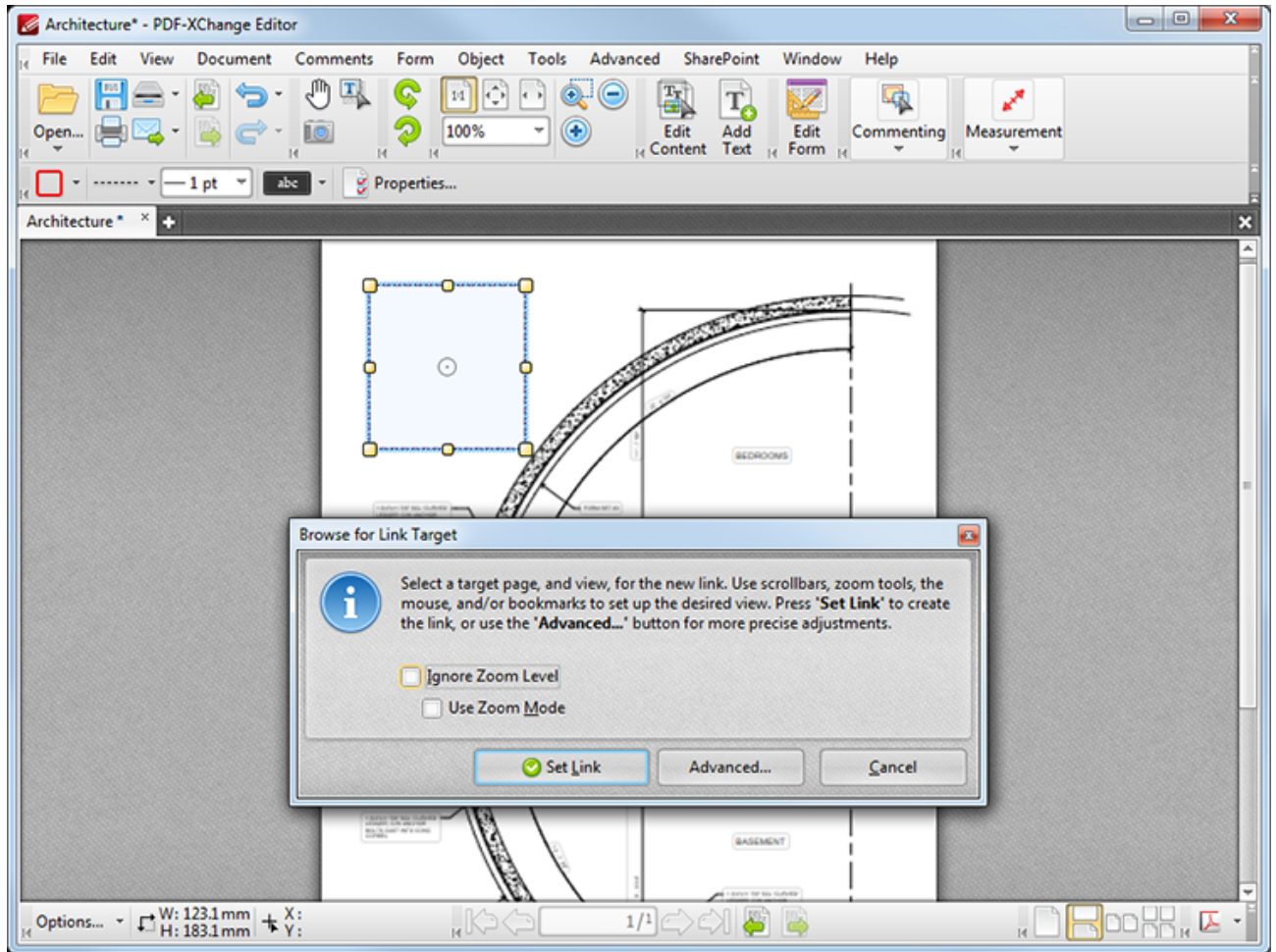
Figure 2. Link Tool Example

- 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.
- Use the editing aids detailed **here** 525 to assist in the precise placement of links.
- Right-click links for further options. See **here** 865 for an explanation of these options.
- When the **Link Creation Tool** is selected, the following options are enabled in the **Properties Toolbar:** 484
  - **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 the **Link Creation Tool Properties** pane. See **here** 869 for information on tool properties.

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 subsequently 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 subsequently used.
- Move to the desired link location and zoom level, then click **Set Link** to create the link.
- Click **Advanced** to determine advanced settings for links. The following dialog box will open:
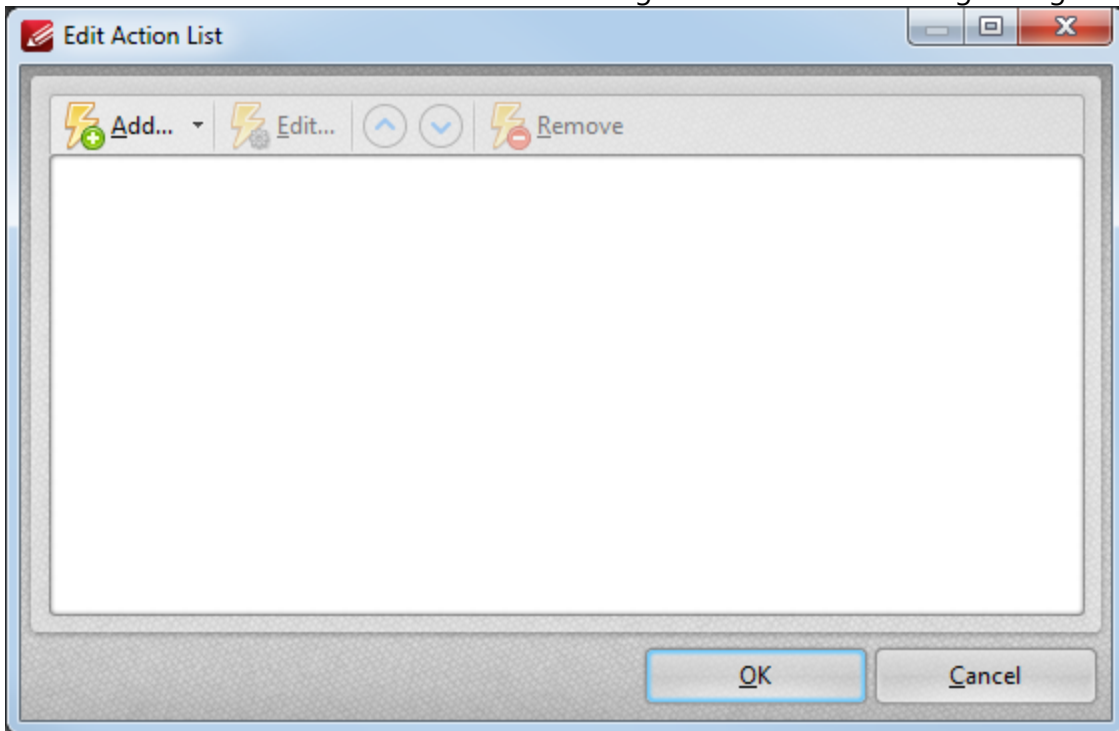
Figure 3. Edit Actions List Dialog Box

- Click **Add** to add actions to the list. Actions will be executed when the link is selected. Please note that it is possible to add multiple actions.
- Select actions and click **Edit** to adjust their settings.
- Click the arrow icons to move selected actions up or down in the list.
- Click **Remove** to remove actions from the list.

The following actions are available:

- **Run a JavaScript** [740]
- **Go to Page Options** [742] (**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** [745]

- **Open a File** 747
- **Execute a Command** 749
- **Reset a Form** 751
- **Submit a Form** 753
- **Play a Sound** 752
- **Show/Hide a Field** 755
- **Read an Article**

Please note that the **Link Creation Tool** must be selected in order to delete links.

6.7.6.1 Run a JavaScript

Run a JavaScript

This action executes JavaScript when the link is clicked:
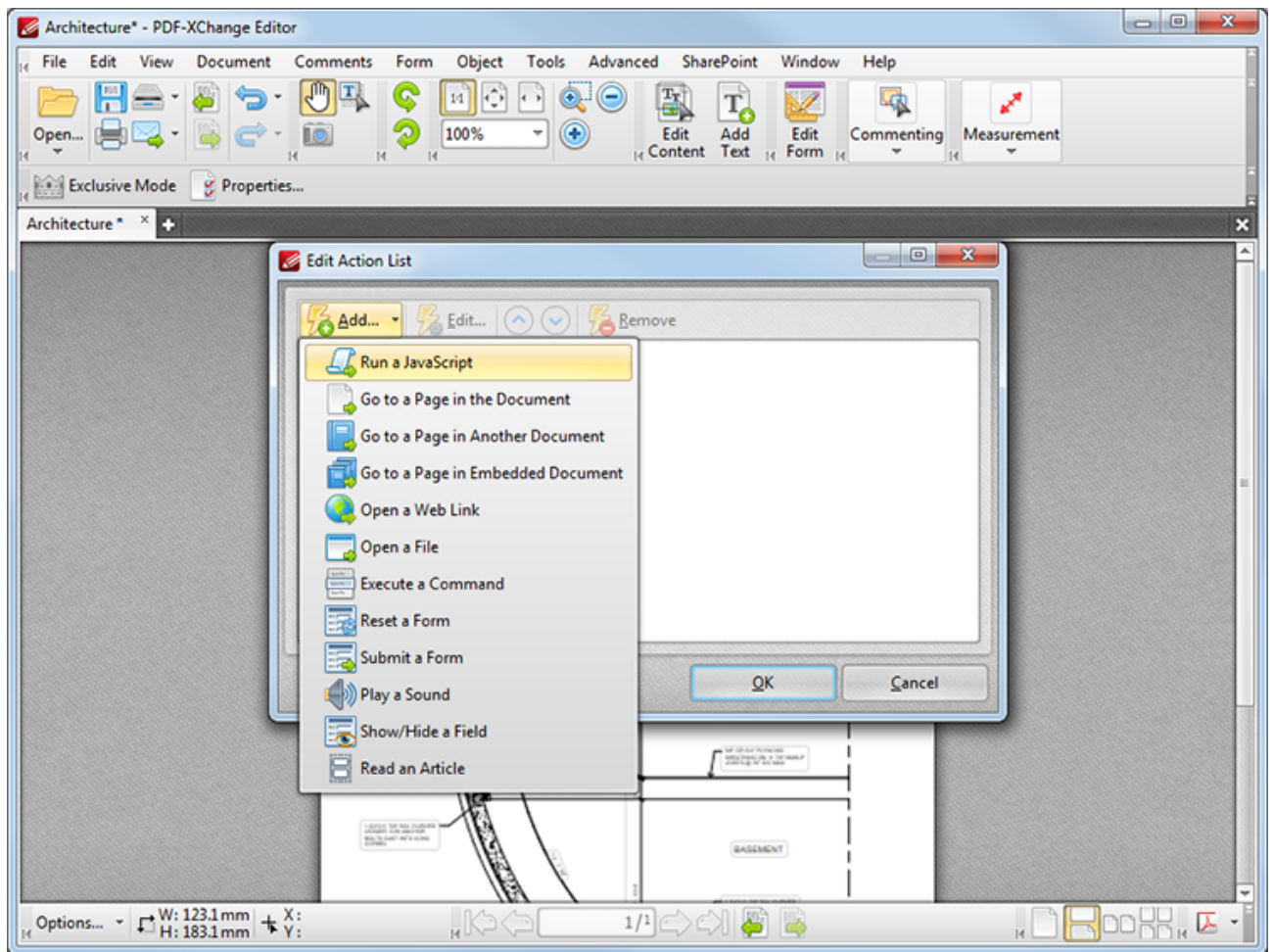
Figure 1. Edit Action List Dialog Box. Run a JavaScript

When it is selected the following dialog box will open:
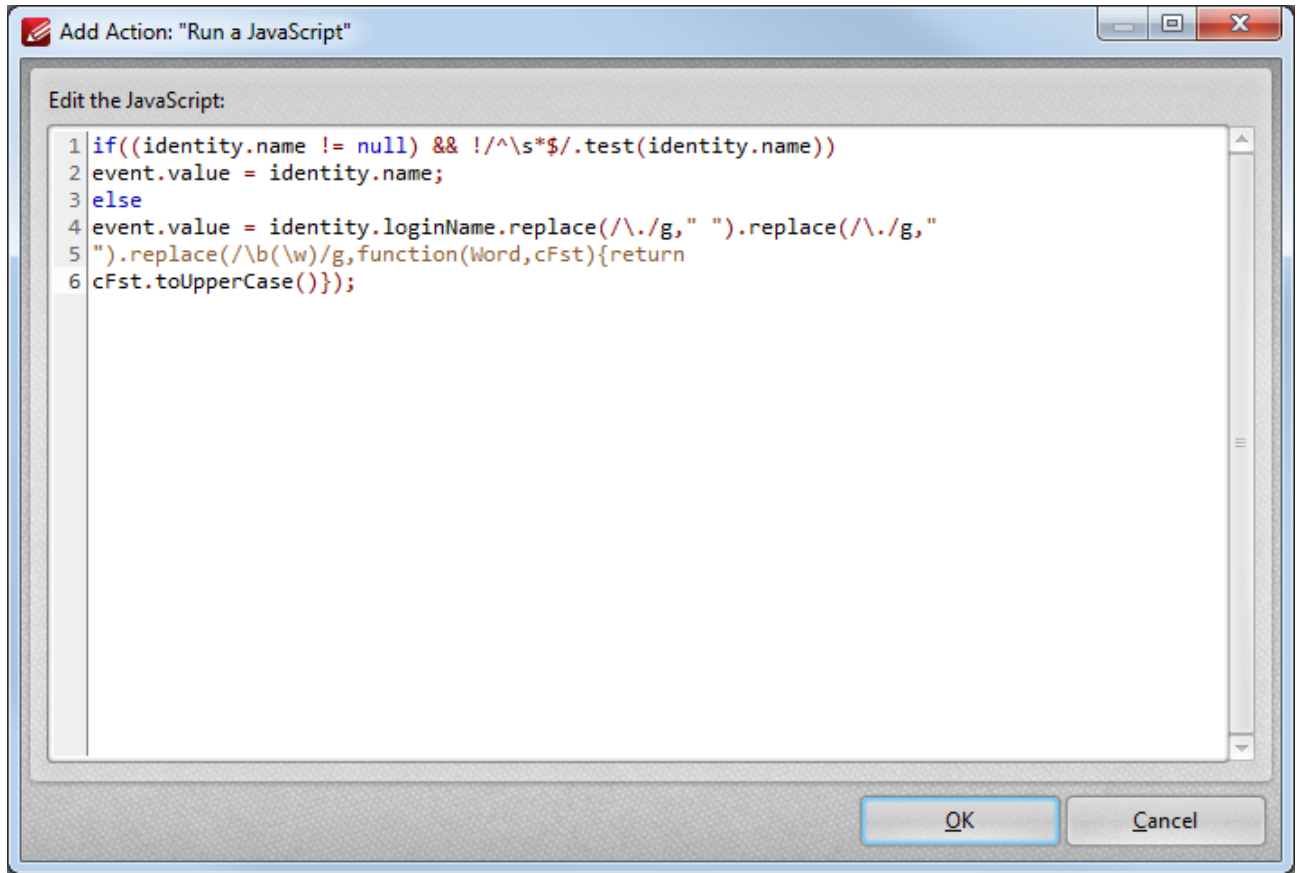
Figure 2. Add Action: "Run a JavaScript" Dialog Box

Enter the desired JavaScript and click **OK** to save.

6.7.6.2   Go To Page Options

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![PDF-XChange logo]**Go To Page Options**

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There are three **Go To Page** options available for links:
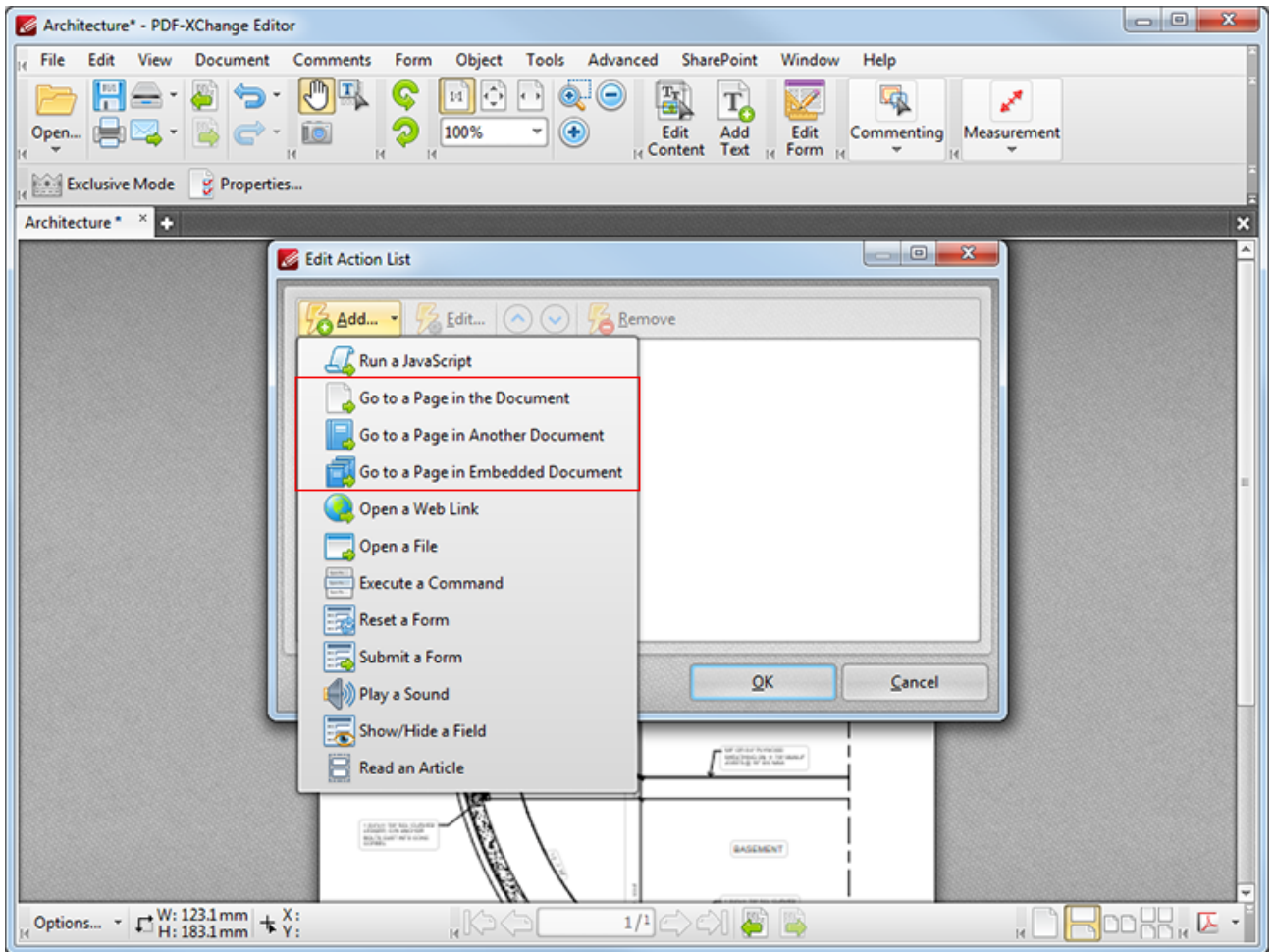
Figure 1. Edit Action List Dialog Box. Go to Page Options

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:
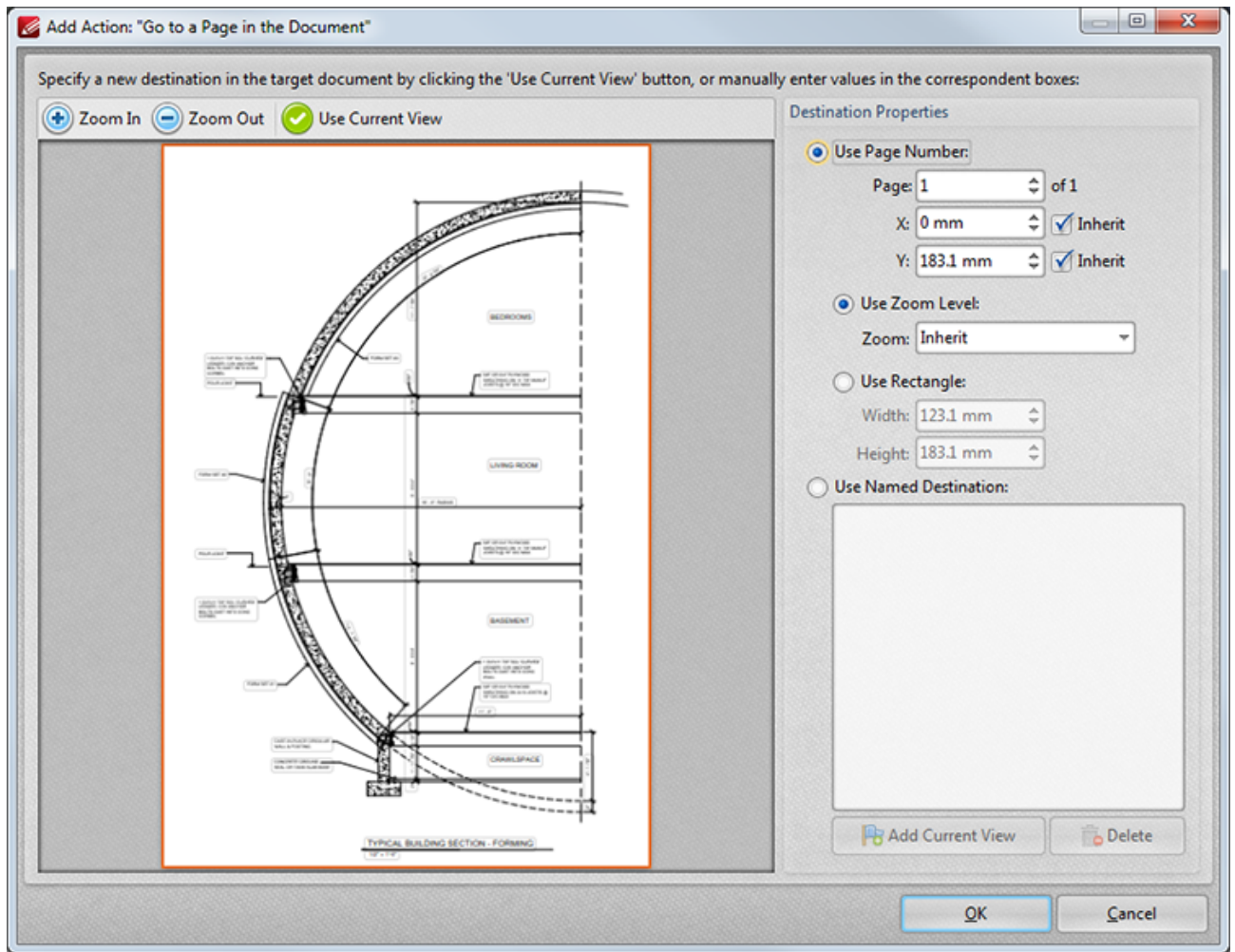
Figure 2. Add Action: "Go to a Page in the Document" Dialog Box

- Use the plus and minus icons to zoom in/out.
- Click **Use Current View** to use the view currently displayed in the preview pane as the location to which the link moves. Please note that this option can be used to zoom to locations on the same page as the link itself.
- Alternatively, use the **Destination Properties** options to select a page. Enter a page number or use a **Named Destination** 503 to determine the page.
- Select the **Use Page Number** option button to determine the link using the relevant page number. The figures entered in the **X** and **Y** boxes determine the location on the horizontal and vertical planes respectively. When this option is used it is also possible to determine the zoom level or use a rectangle to designate the destination:
  - Select the **Use Zoom Level** option button to determine the level of zoom used in the link. Use **Inherit Zoom** to save the zoom level when creating the link.
  - Use the **Use Rectangle** option button to designate the destination using a rectangle. Enter values for the **Width** and **Height**.

- Alternatively, select the **Use Named Destination** option button to select a destination that has already been determined within the document, or click **Add Current View** to create a new named destination from the current view.

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).*

6.7.6.3 **Open a Web Link**

Open a Web Link

This action launches a web link in the default browser of the local computer when links are clicked:
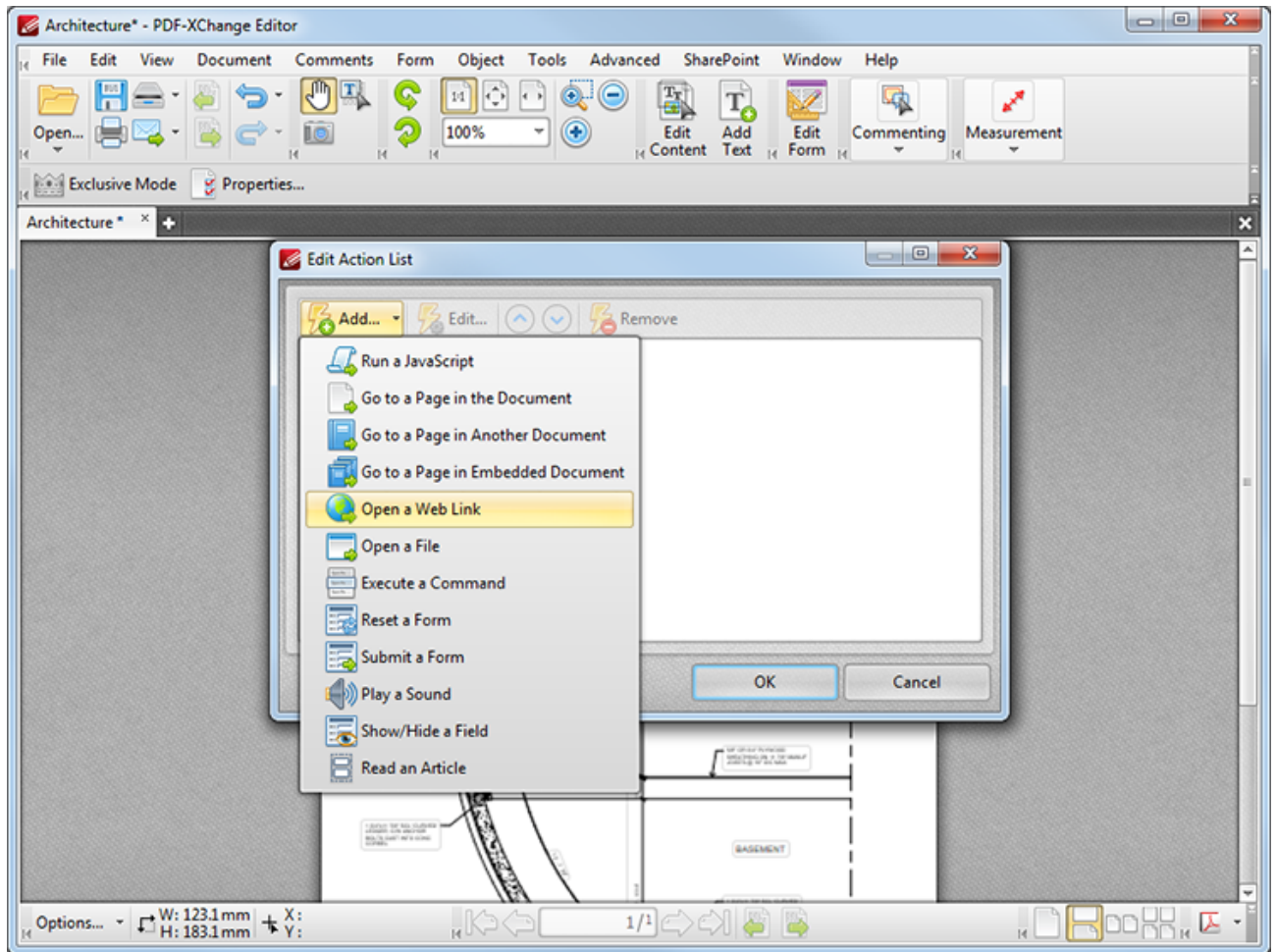
Figure 1. Edit Action List Dialog Box. Open a Web Link

When it is selected the following dialog box will open:
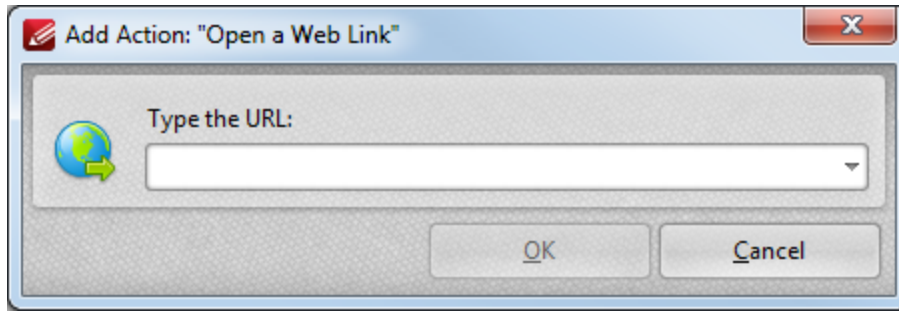
Figure 2. Add Action: "Open a Web Link" Dialog Box

Enter the desired URL in the text box, then click **OK** to save settings.

Please note that **PDF-XChange Editor** retains links when the **Export to Microsoft Word Document** option of the **Export** 197 feature is used to convert documents to ***.docx** format.

6.7.6.4   Open a File

 Open a File

This action opens a file when link are clicked:
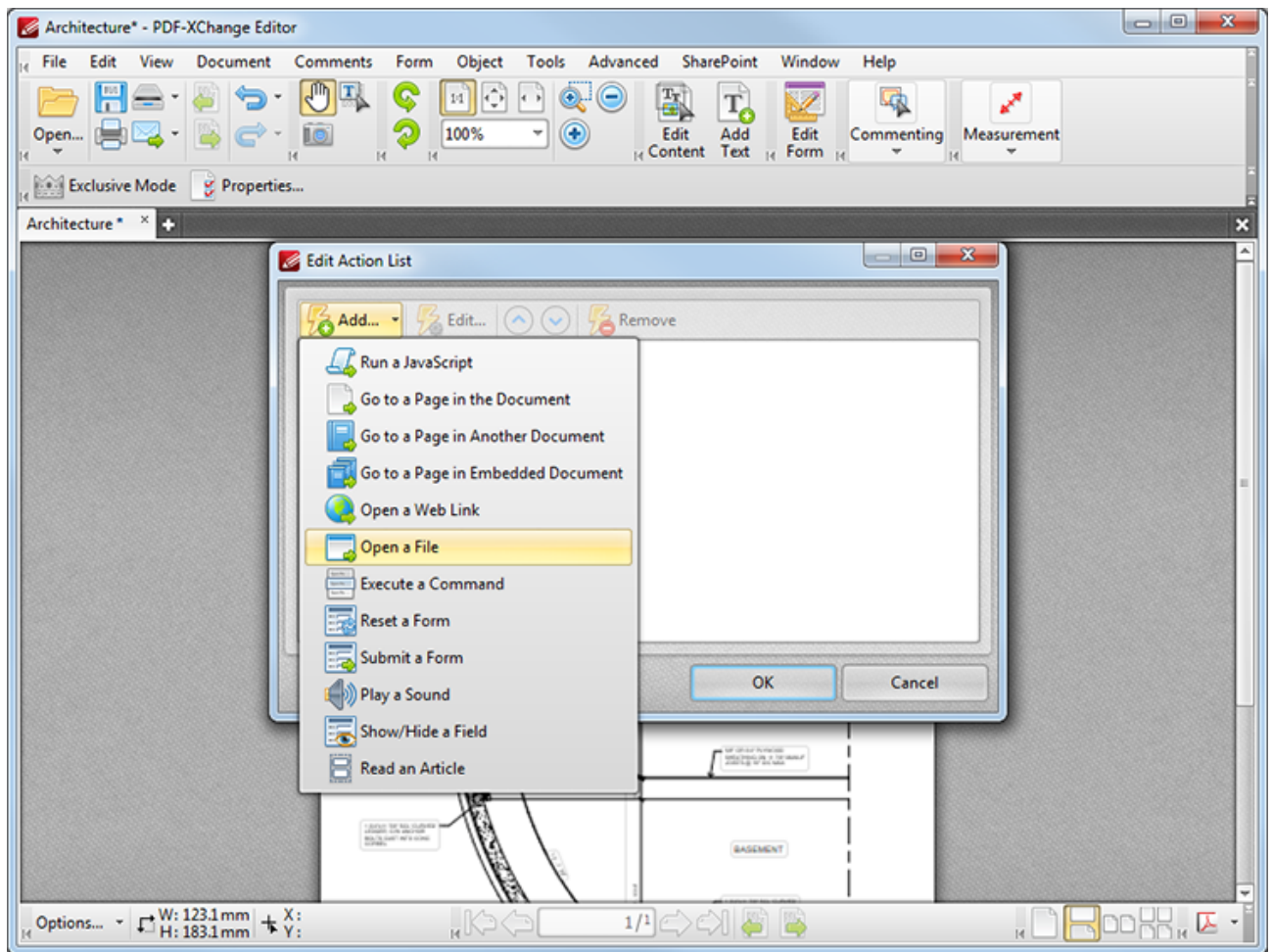
Figure 1. Edit Action List Dialog Box. Open a File

When it is selected the following dialog box will open:
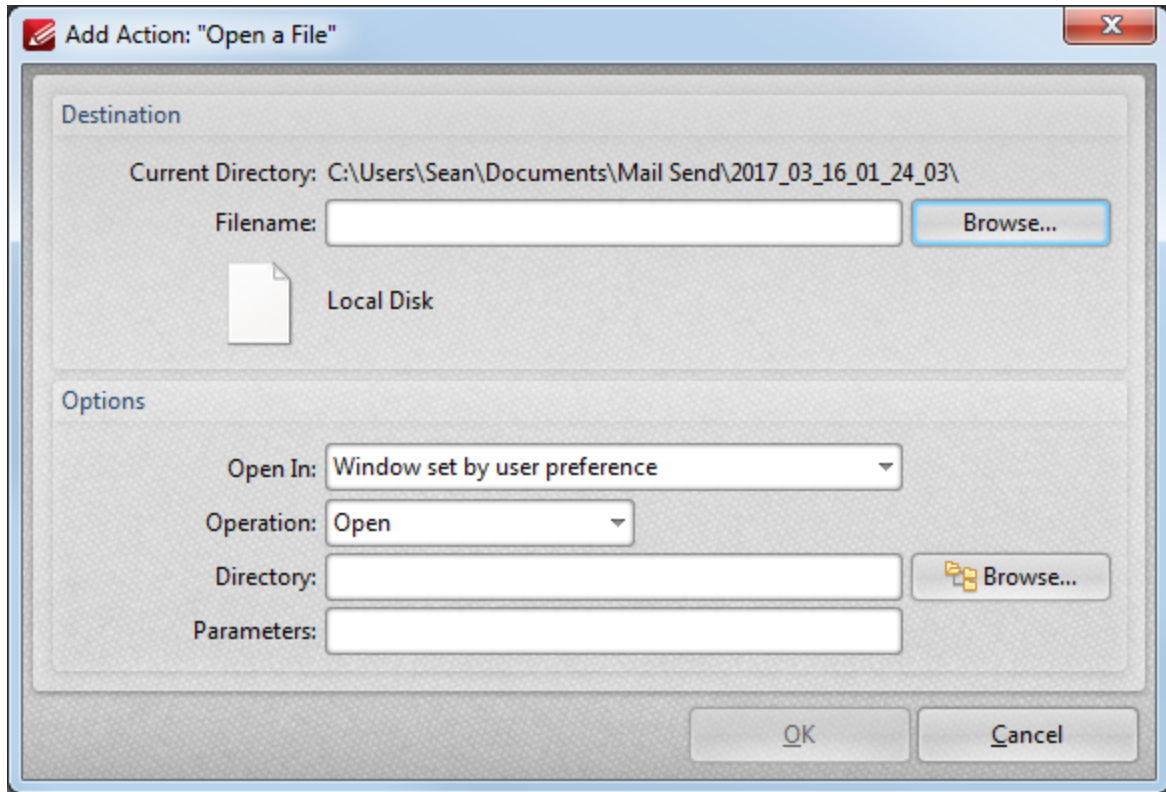
Figure 2. Add Action: "Open a File" Dialog Box

- 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.
- Use the **Operation** menu to determine the operation that takes place. Select **Open** for the file to open or **Print** for the file to print.
- Use the **Directory** text box to determine the directory of the desired file, or click **Browse** to select a folder from the local computer.
- Use the **Parameters** text box to include further parameters of the default program used to open the file. Available parameters depend on the command line options available to the program.

Click **OK** to save settings.

6.7.6.5   Execute a Command

Execute a Command

This action executes a command when links are clicked:
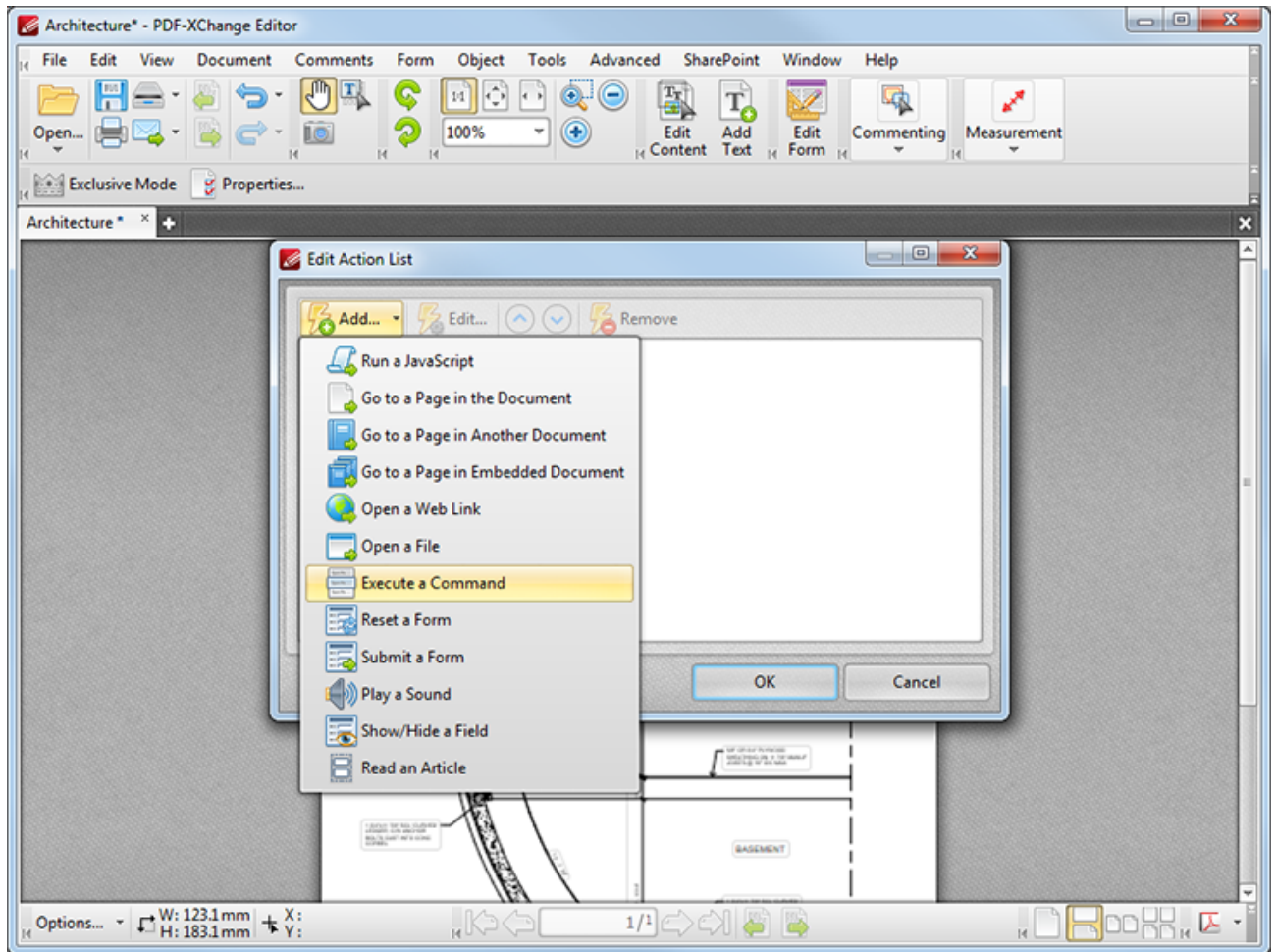
Figure 1. Edit Action List Dialog Box. Execute a Command

When it is selected the following dialog box will open:
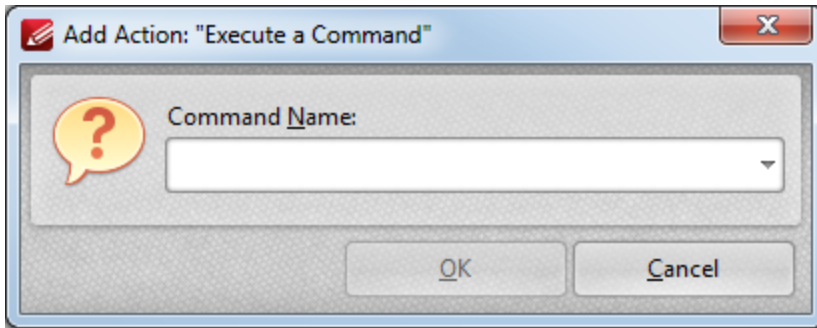
Figure 2. Add Action: **"**Execute a Command" Dialog Box

- Click the dropdown arrow for a list of available commands. All commands available in **PDF-XChange Editor** are contained selected in this menu. Select commands and click **OK** to add them to the link. Multiple commands can be added as desired. When all desired commands have been added, click **OK** to save settings.

6.7.6.6   Reset a Form

![PDF-XChange icon]**Reset a Form**

This action resets form data when links are clicked:
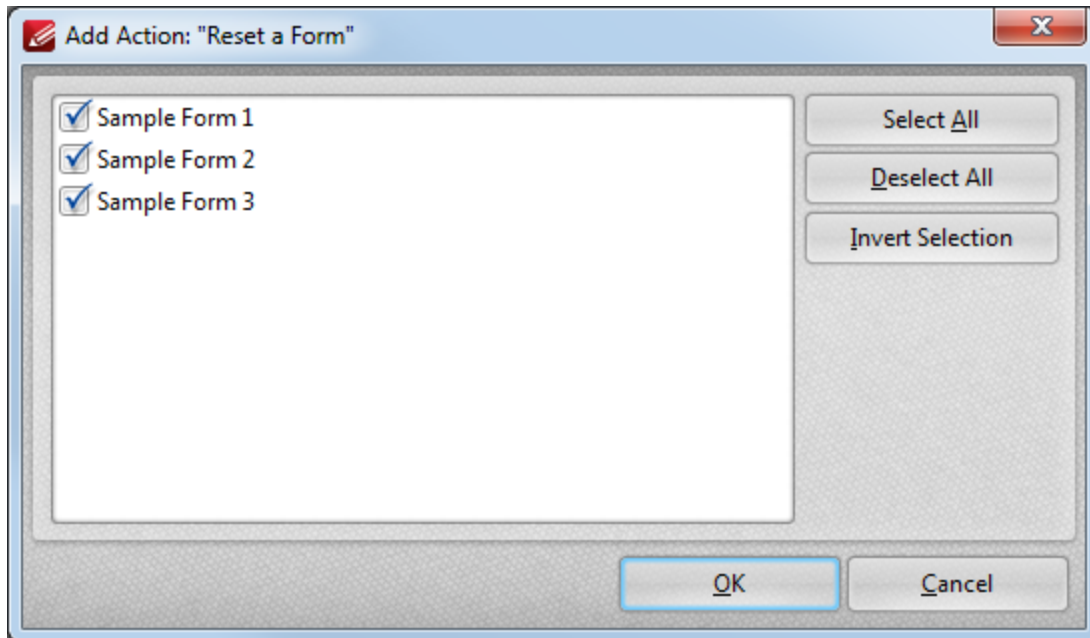
Figure 1. Add Action: "Reset a Form" Dialog Box

This dialog box displays all document forms.

- Click **Select All** to select all forms.
- Click **Deselect All** to deselect all forms.
- Click **Invert Selection** to invert the current form selection.
- Please note that the **Form Toolbar** |320| can be used to create/edit forms to use in conjunction with this feature.

When the desired parameters have been selected, click **OK** to save settings.

6.7.6.7 Play a Sound

Play a Sound

This action plays a sound when links are clicked:
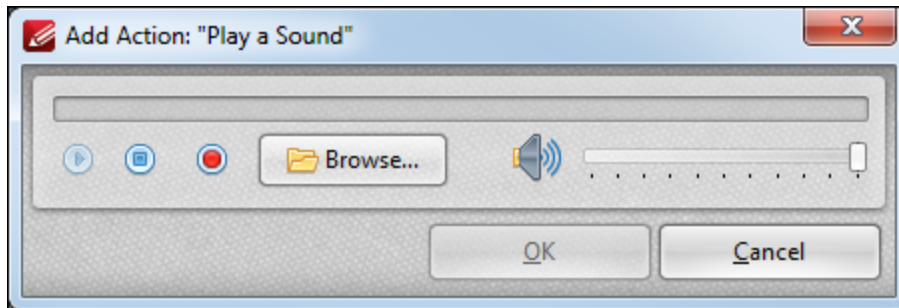
Figure 1. Add Action: "Play a Sound" Dialog Box

- 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 settings.

6.7.6.8 Submit a Form

Submit a Form

This action sends the specified form data to a URL when links are clicked:
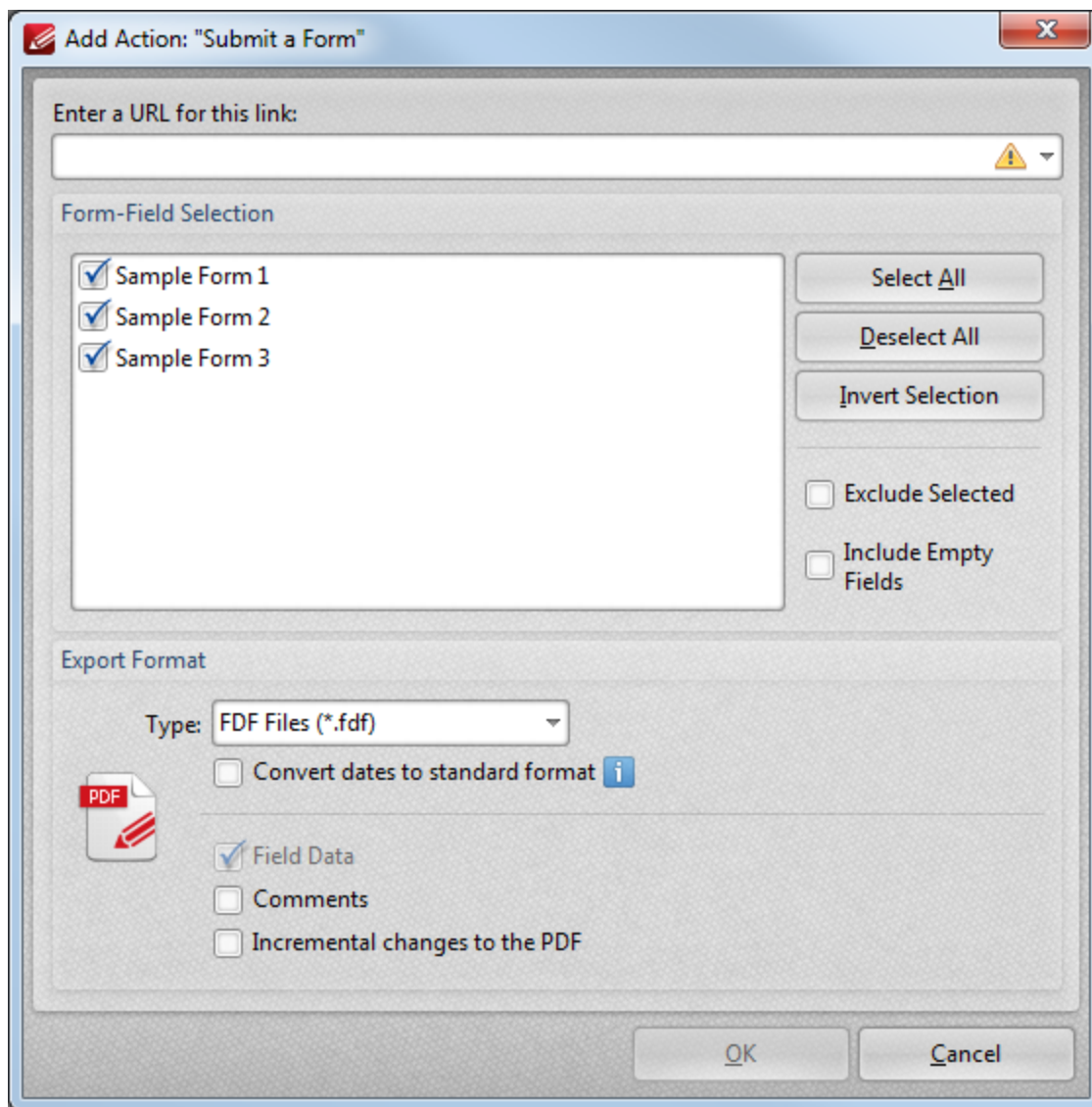
Figure 1. Add Action: "Submit Form" Dialog Box

- Enter the desired URL for the link.
- All document forms are detailed in the **Form-Field Selection** pane. Use the check boxes to select forms.
  - 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** menu to determine the format of submitted content.
- Select the **Convert dates to standard format** box as desired.
- Select the format-specific check boxes as desired. Selected formats will be included in submitted content.
- Please note that the **Form Toolbar** 320 can be used to create/edit forms to use in conjunction with this feature.
- Click **OK** to save settings.

6.7.6.9   Show/Hide a Field

Show/Hide a Field

This action is used to show/hide form fields when links are clicked:
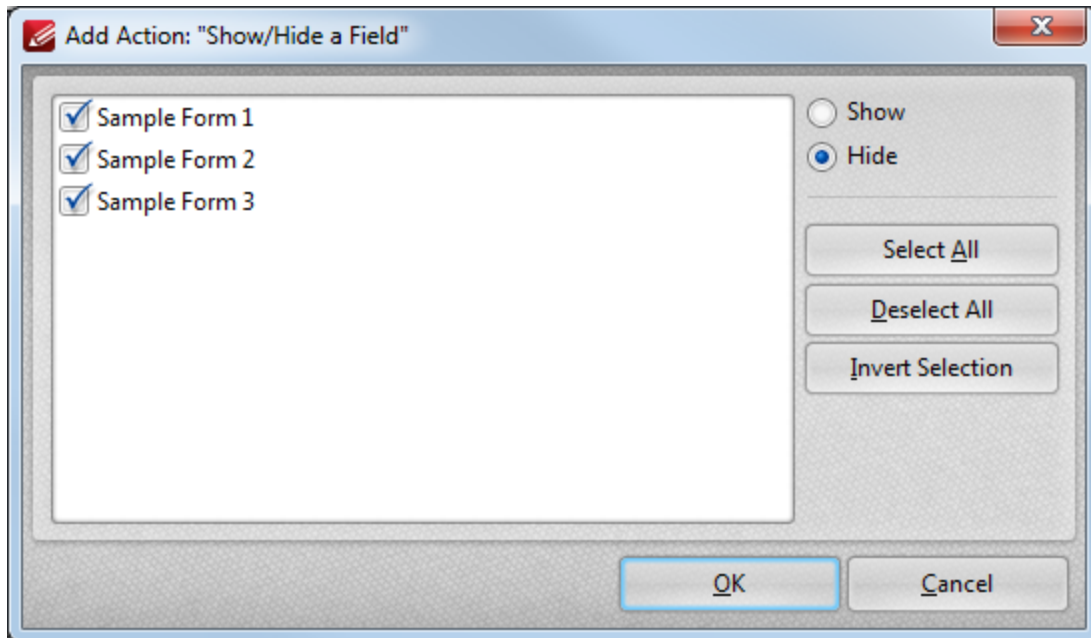
Figure 1. Add Action: "Show/Hide a Field" Dialog Box

- All document forms are displayed in the dialog box.
- Click either **Show** or **Hide** for the field selected.
- 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.

6.7.6.10 **Read an Article**

Read an Article

This action is not currently available. It will be available in future builds.

6.8   Advanced

Advanced

Bookmarks is the only option currently available in the **Advanced** tab. When the pointer is hovered over **Bookmarks** the following options are available:
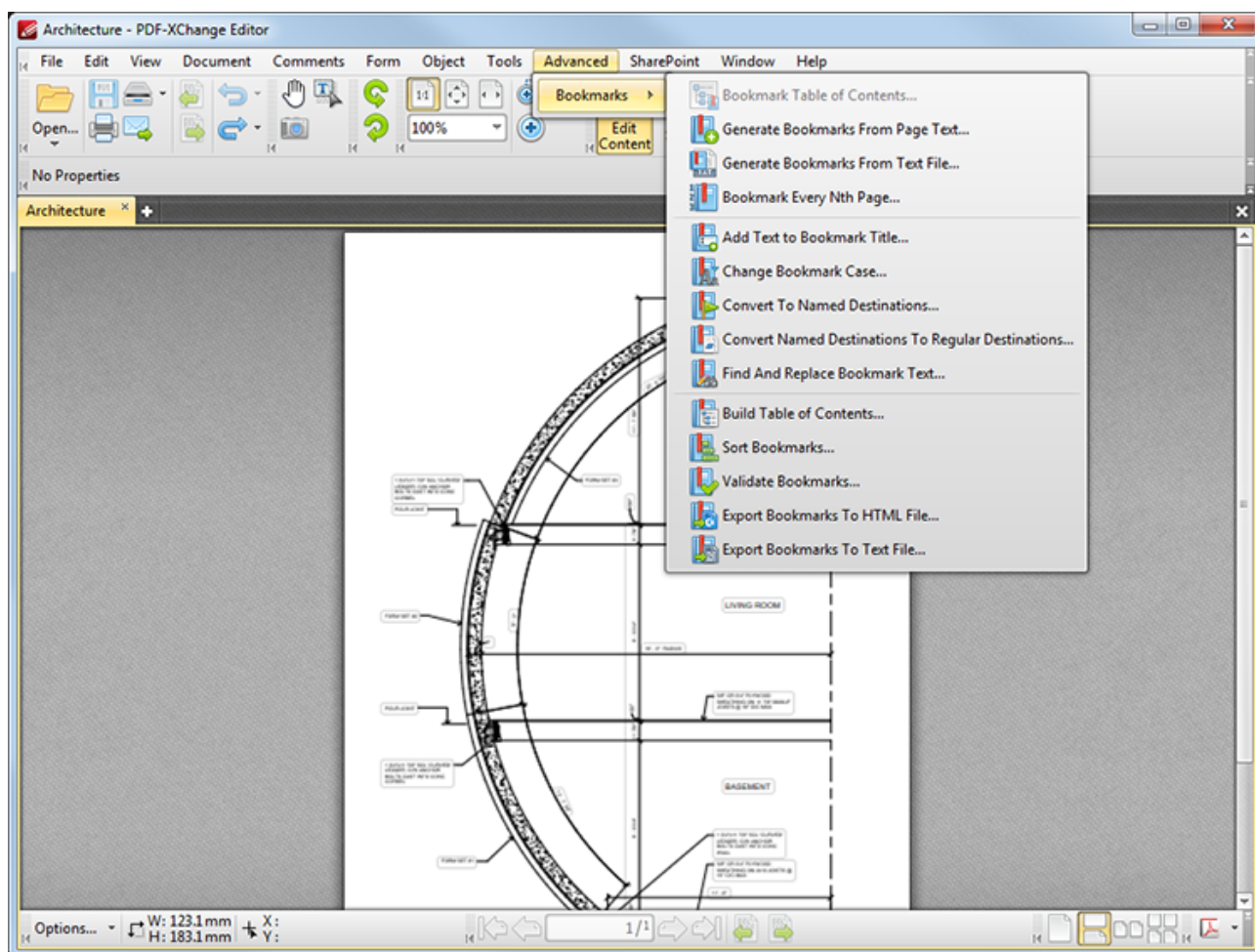
Figure 1. Advanced Tab Submenu

These options relate to bookmarks and their associated functionality:

- **Bookmark Table of Contents** 759
- **Generate Bookmarks from Page Text** 761
- **Generate Bookmarks from Text File** 766
- **Bookmark Every Nth Page** 767
- **Add Text to Bookmark Title** 769
- **Change Bookmark Case** 771
- **Convert to Named Destinations** 773
- **Convert Named Destinations to Regular Destinations** 774
- **Find and Replace Bookmark Text** 775
- **Build Table of Contents** 777
- **Sort Bookmarks** 779
- **Validate Bookmarks** 780
- **Export Bookmarks to HTML File** 782
- **Export Bookmarks to Text File** 783

The **Bookmarks Guide** 61 is a useful resource for bookmarks and bookmark operations. Additionally, please note that several of the keyboard shortcuts relate to bookmarks. See **here** 814 for a comprehensive list of available keyboard shortcuts.

6.8.1   **Bookmark Table of Contents**

Bookmark Table of Contents

Click **Bookmark Table of Contents** to create bookmarks from an existing table of contents. The table of contents must first be selected using the **Select Text Tool** ⌐640⌐ for this feature to operate. The following dialog box will be displayed:
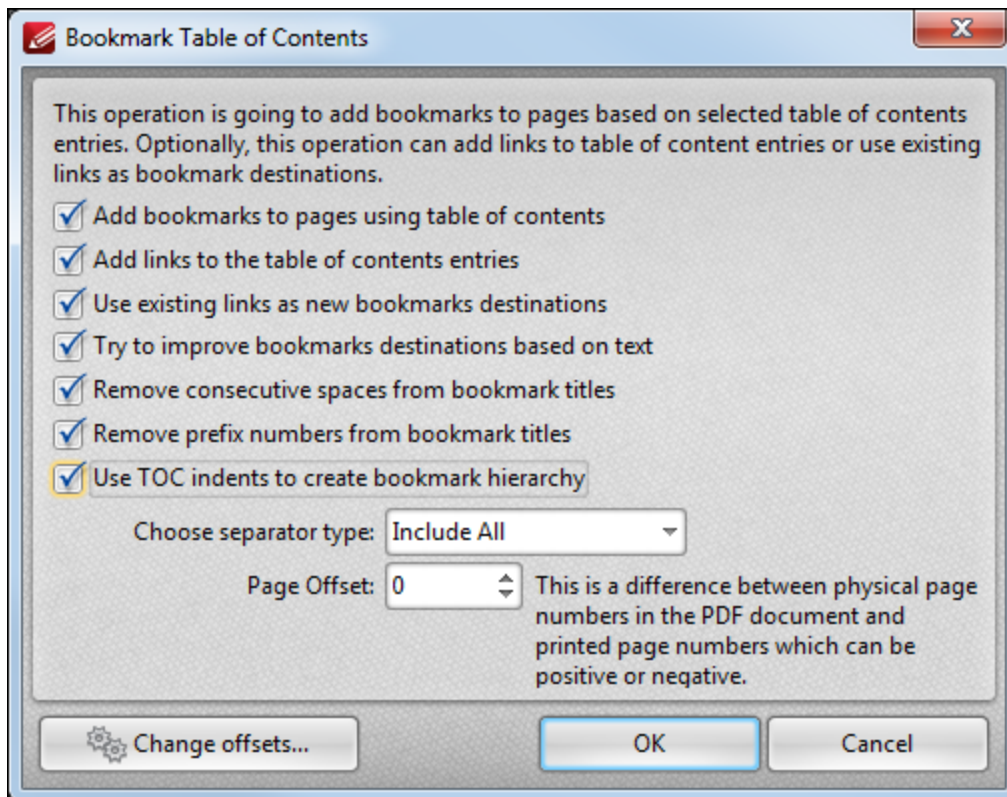
Figure 1. Bookmark Table of Contents Dialog Box

- Select the check boxes to enable/disable parameters.
- Select an option from the **Choose separator type** menu.
- Enter a value as the **Page Offset** in the adjacent number box.
- Click the **Change Offsets** button to adjust offset settings.
- When the desired parameters have been selected, click **OK** to create bookmarks from the selected table of contents.

6.8.2 **Generate Bookmarks From Page Text**

Generate Bookmarks From Page Text

Click **Generate Bookmarks From Page Text** to create bookmarks from document text:
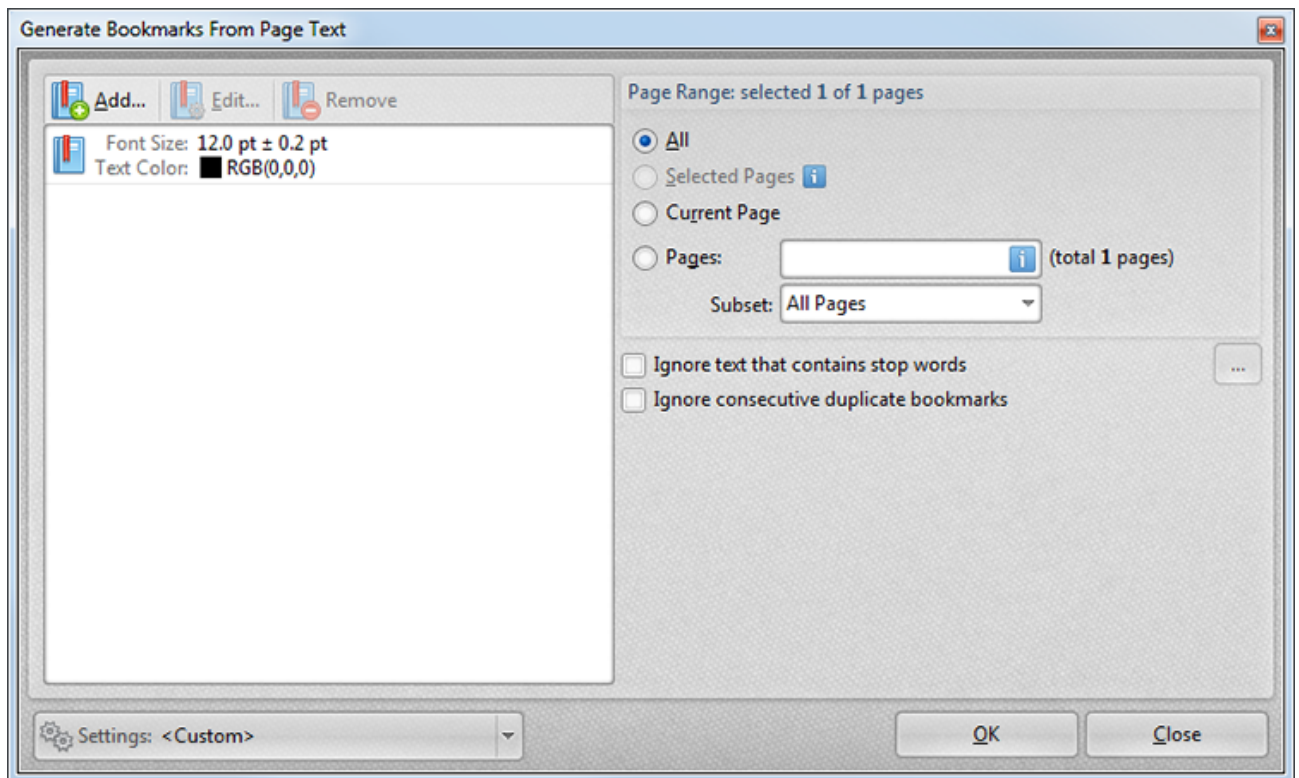
Figure 1. Generating Bookmarks From Page Text Dialog Box

- Click **Add** to add a new bookmark. The dialog box displayed in *(figure 2)* will open.
- Click **Edit** to edit the selected bookmark.
- Click **Remove** to remove the selected bookmark
- The **Pages Range** options are as follows:
  - Select **All** to select all document pages.
  - Select **Selected Pages** to select only the pages currently selected in thumbnails view.
  - Select **Current Page** to select only the current page.
  - Use the **Pages** box to determine specific pages/page ranges. See **here** [860] for further information.

- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Select the **Ignore text that contains stop words** box as desired. This setting designates that specific words will prevent the generation of bookmarks if they are contained within selected text. Click the ellipsis icon to view/edit the list of stop words.
- Select the **Ignore consecutive duplicate bookmarks** box to prevent the creation of consecutive identical bookmarks.
- When the desired parameters have been selected, click **OK** to generate the bookmark.
- Click **Settings** to manage preset configurations for bookmarks.
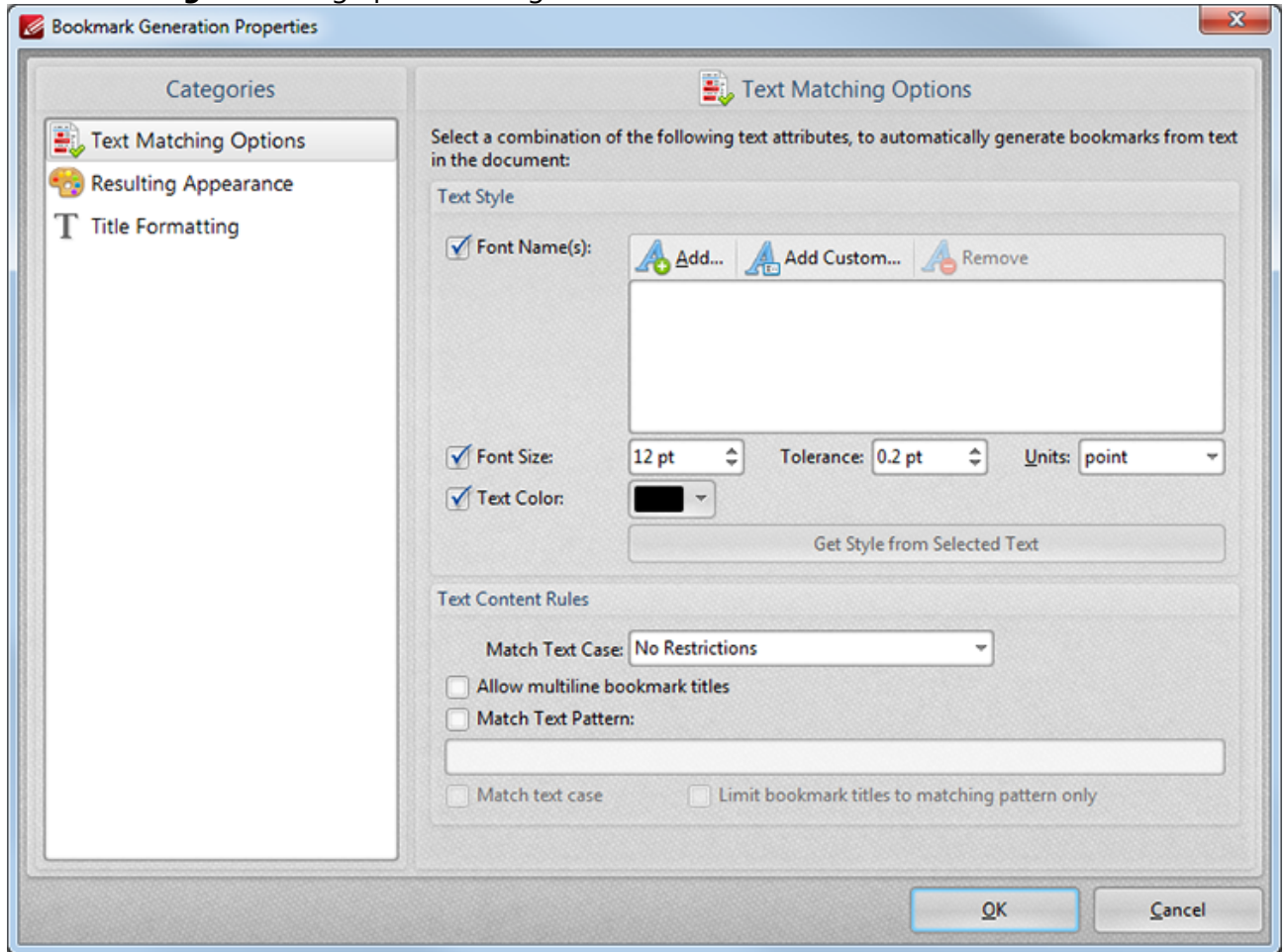
Figure 2. Bookmark Generation Properties Dialog Box

Text Matching Options

These options determine the details of the text from which the bookmark will be generated:

- Enter the parameters of the desired text in the **Text Style** section.
- Select the **Font Names** from which the text will be selected. Click **Add** to view/edit the list of supported fonts.

- Specify the **Font Size**. The value entered in the **Tolerance** number box determines the degree to which selected text can differ from the specified **Font Size** and remain included in the bookmark.
- Select the **Text Color**. Text of the color selected only will be included in the bookmark generation.
- When text is selected in the active document, click the **Get Style from Selected Text** button to update the font details according to the selected text.
- The **Text Context Rules** determine the details of the text to be used in generating bookmarks.
- The **Match Text Case** setting determines the specifics for when the software matches text to be used in the generation of bookmarks. Select an option from the menu.
- Select the **Allow multiline bookmark titles** box to allow the title of a bookmark to exceed a single line in length. This is useful in cases where it is not possible to shorten the title of bookmarks.
- Select the **Match Text Pattern** box to detail a specific sequence of words that the text must match to be included in the bookmark generation. Enter the desired text pattern into the text box.
- Select the **Match text case** box to determine that the case of the text outlined in the **Match Text Pattern** text box must match the case of the text in the active document.
- Select the **Limit bookmark titles to matching pattern only** box to determine that text that matches the specified pattern only will be included in the generation of bookmarks.
- Click **OK** to update changes.

Resulting Appearance

These settings determine the appearance of bookmarks within the **Bookmarks** pane:

- Use the **Text Color** menu to determine the color of the text used for the bookmarks.
- Use the **Text Style** menu to determine the style of the text used for bookmarks.
- Use the **Zoom** menu to determine the zoom used with bookmarks. Select **Inherit** to use the existing zoom level.
- Select the **Show expanded** box to expand all bookmarks after they are created.

Title Formatting

These settings determine the appearance of the text used in the titles of bookmarks. When they are selected the following dialog box is displayed:
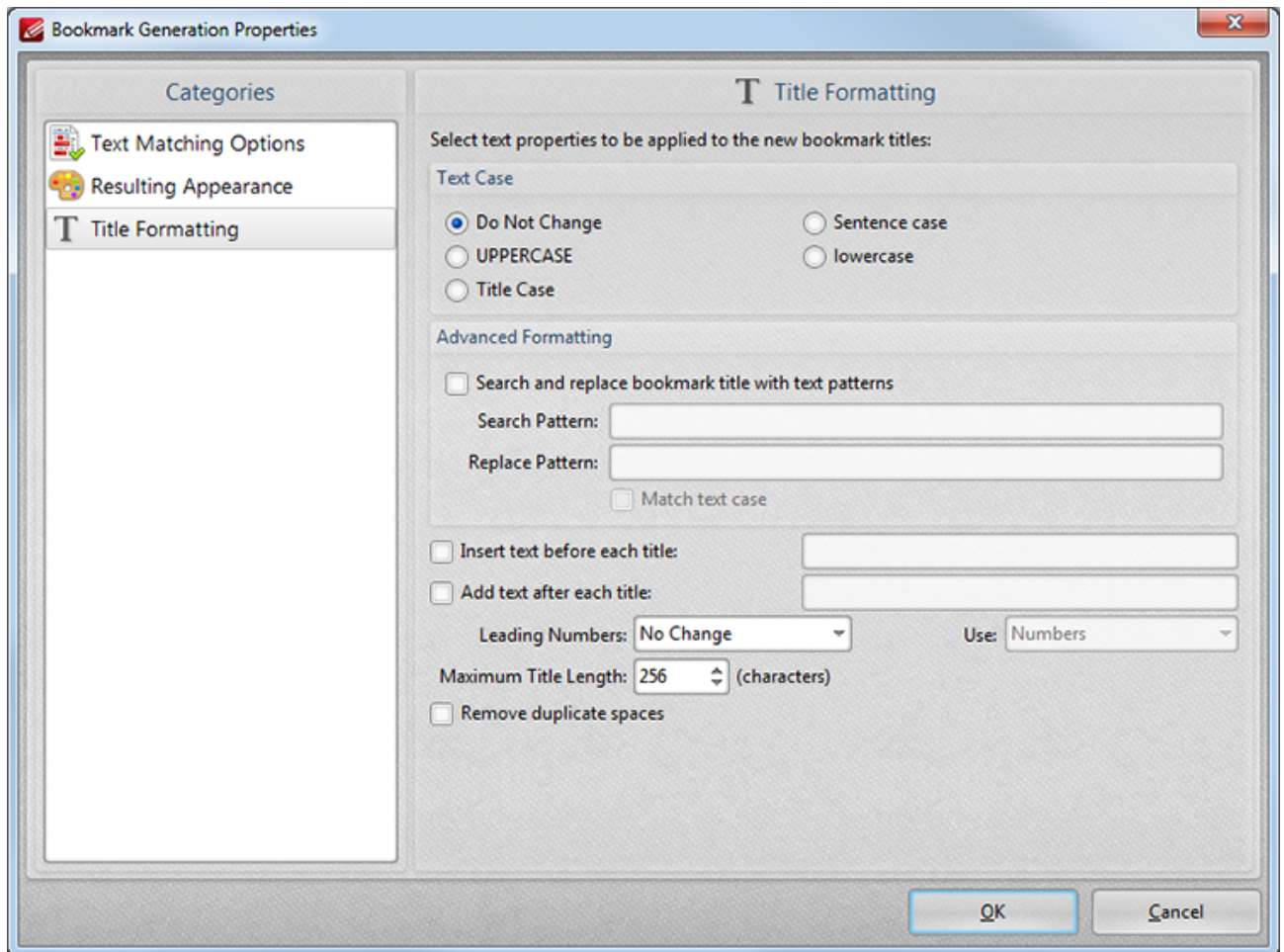
Figure 3. Bookmark Generation Properties Dialog Box

- Select an option in the **Text Case** section to determine the case of the text.
- Select the **Search and replace bookmarks title with text patterns** box as desired. The bookmark title will then match the specified text pattern.
- Use the **Search Pattern** text box to enter the desired search pattern.
- Use the **Replace Pattern** text box to enter the desired replace pattern.
- Select the **Match text case** box as desired.
- Select the **Insert this text before each title** box to prepend bookmark titles with the text entered in the adjacent box.
- Select the **Add this text after each title** box to append bookmark titles with the text entered in the adjacent box.
- Select an option from the **Leading numbers** menu to add or remove numbers to the title of the bookmark. When adding numbers to the title, select an option from the **Use** menu to determine the format of numbers added.
- Select a figure for the **Maximum title length** as desired.
- Select the **Remove duplicate spaces** box to remove instances of adjacent blank characters.
- When the desired parameters have been selected, click **OK** to update.

6.8.3   Generate Bookmarks From Text File

Generate Bookmarks From Text File

Click **Generate Bookmarks From Text File** to create bookmarks from text files. The following dialog box will be displayed:
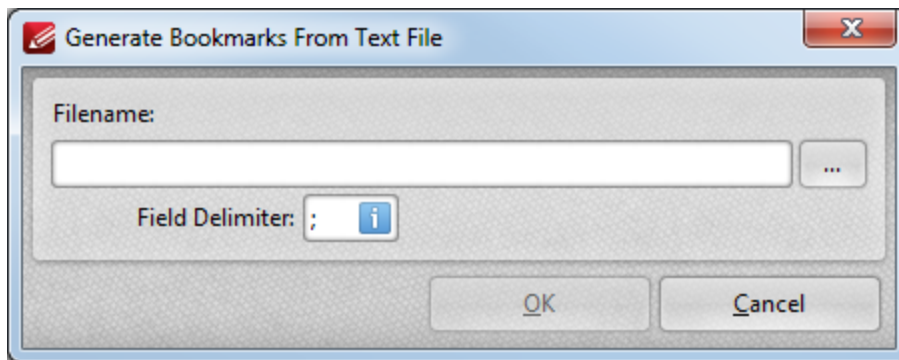
Figure 1. Generate Bookmarks From Text File Dialog Box

- Enter the name of the text file to be used in the **File Name** text box. Alternatively, click the ellipsis icon to select a file from the local computer. (Please note that the file used must be in plain text (*.txt) format).
- Use the **Field delimiter** box to determine the delimiter as required. This figure specifies the boundary between fields.
- Click **OK** to save changes.

6.8.4   **Bookmark Every N-th Page**

![PDF-XChange icon] **Bookmark Every N-th Page**

Click **Bookmark Every Nth Page** to create bookmarks in relation to document page numbers. The following dialog box will be displayed:
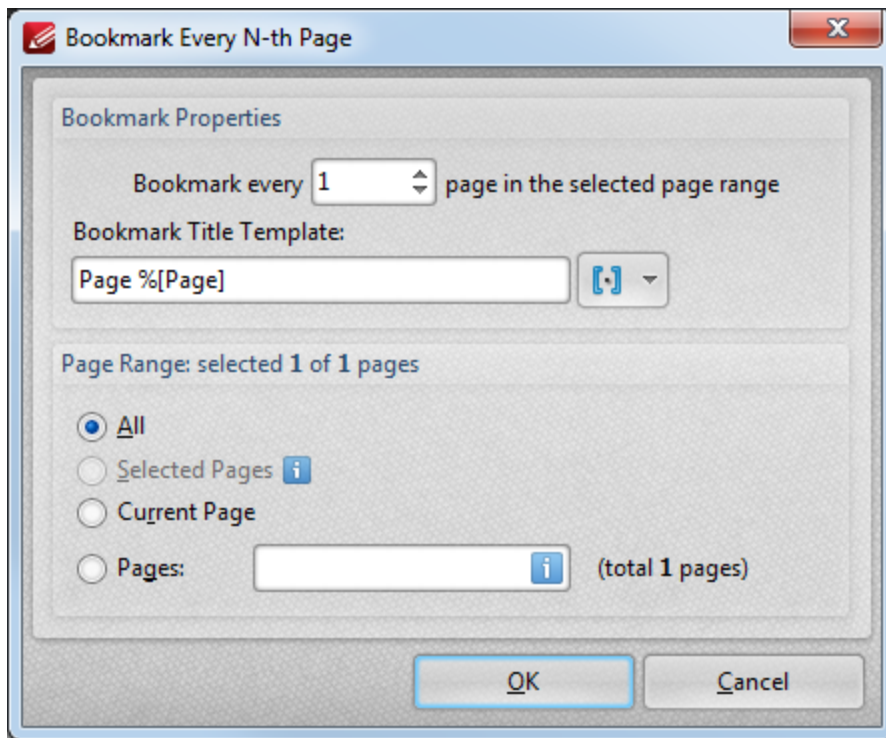
Figure 1. Bookmark Every N-th Page Dialog Box

- Enter a figure in the number box to determine the nth pages of the document from which to create bookmarks. For example, if 2 is entered then every second page of the document will become a bookmark.
- Enter a value for the **Bookmark title template**. Use the icon to add **macros.** [830] The value entered here determines the template for bookmark titles.
- The page range options are as follows:
    - Select **All** to include all pages of the document.
    - Select **Selected Pages** to include only the pages currently selected in thumbnails view.
    - Select **Current Page** to include only the current page.

- Use the **Pages** box to determine specific pages/page ranges. Individual pages must be separated with a comma and page ranges must be separated with a hyphen.
- Use the **Subset** option to select **All Pages, Odd Pages Only** or **Even Pages Only.**
- Click **OK** to create bookmarks.

6.8.5   **Add Text to Bookmark Title**

Add Text to Bookmark Title

Click **Add Text to Bookmark Title** to add text to bookmark titles. The following dialog box will be displayed:
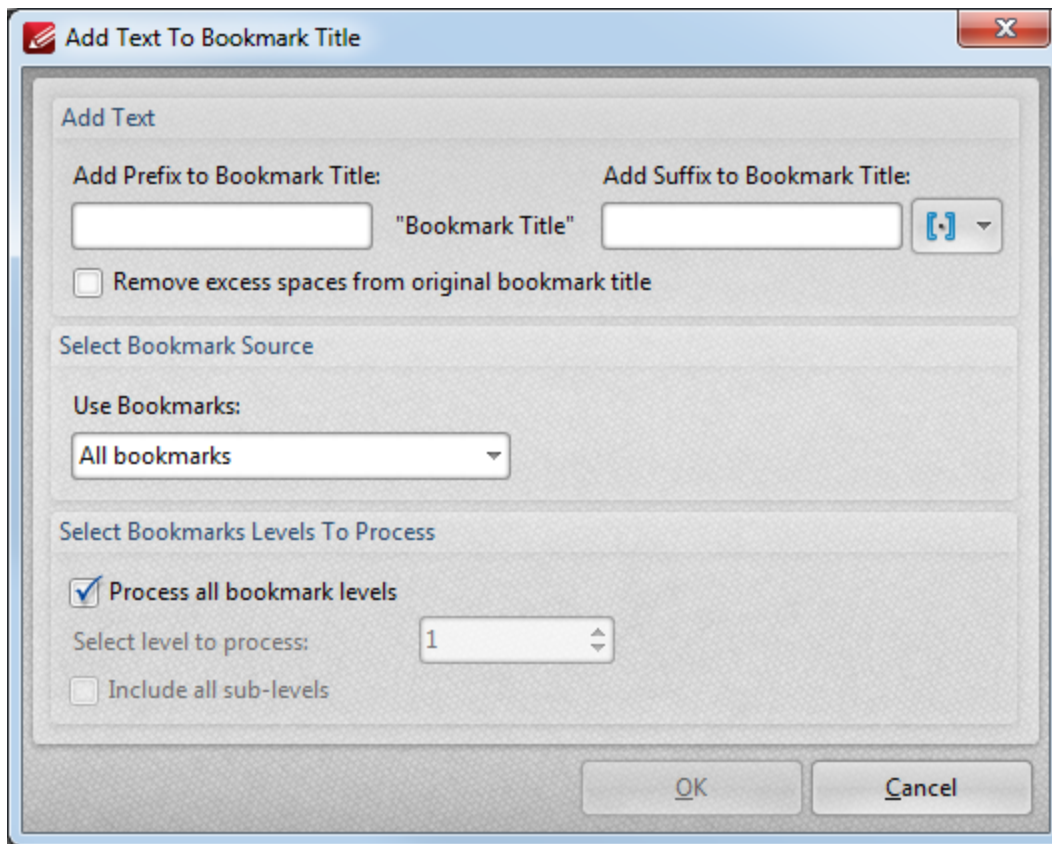
Figure 1. Add Text to Bookmark Title Dialog Box

- Use the **Add Text** boxes to add a prefix/suffix to bookmark titles. Click the icon to add **macros.** [830]
- Click the **Remove excessive spaces from original Bookmark Title** box to remove additional spaces from the bookmark title.
- The **Select Bookmarks Source** menu determines the location from which bookmarks are taken.

- Select the **Process all bookmark levels** box to process all levels of bookmarks. Alternatively, clear the box to select the level of bookmarks to process. The number entered in the number box determines the level of bookmarks that are processed. Alternatively, click the **Include all sub-levels** box to include all levels of the bookmark.
- Click **OK** to save changes.

6.8.6   **Change Bookmark Case**

Change Bookmark Case

Click **Change Bookmark Case** to edit the case of bookmark text. The following dialog box will be displayed:
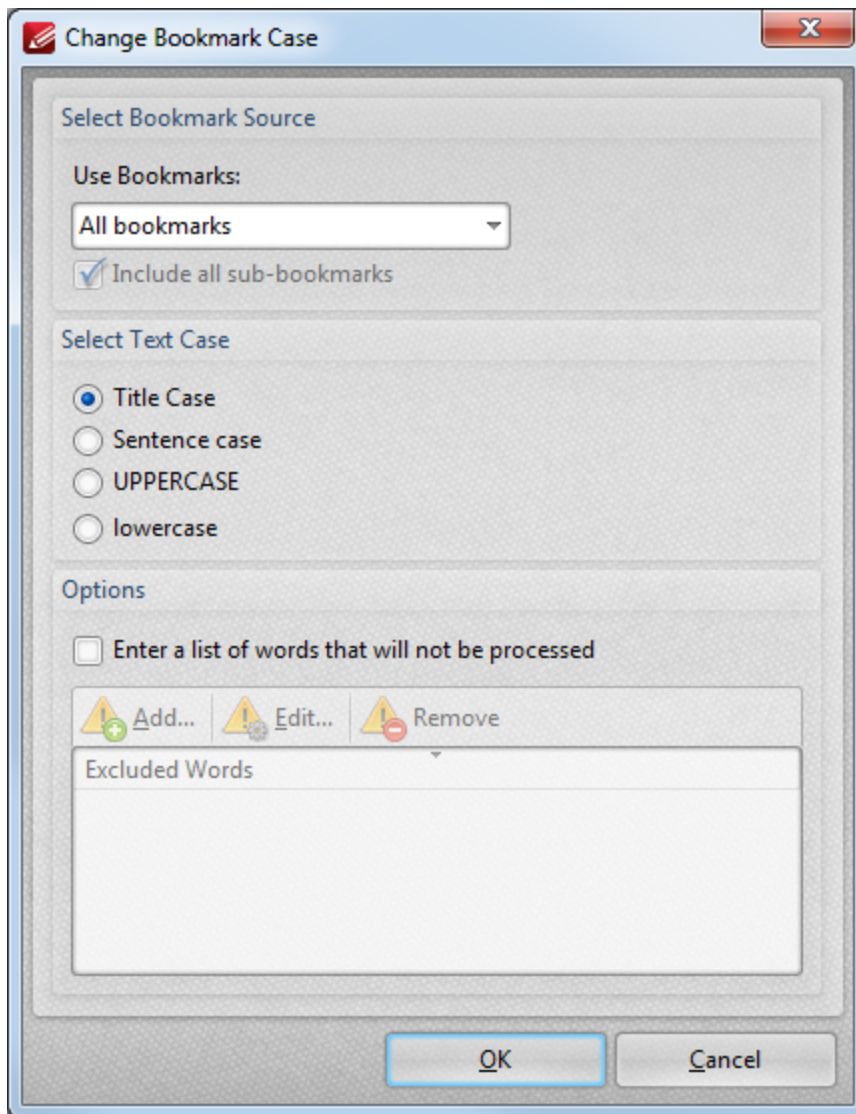
Figure 1. Change Bookmark Case Dialog Box

- Select an option from the **Use Bookmarks** menu to determine the bookmarks to which the remaining settings will apply.
- Select the **Include all sub-bookmarks** box to include sub-bookmarks in the process.
- Select an option from the **Select Text Case** option buttons. This determines the case of the text.
- Select the **Enter a custom list of words that will not be processed** box as desired. Words included in the list will be excluded from the process. Use the **Add, Edit** and **Remove** buttons to add, edit and remove words from the list.
- Click **OK** to save changes.

6.8.7   **Convert to Named Destinations**

Convert to Named Destinations

Click **Convert to Named Destinations** to convert bookmark text into named destinations for subsequent reference as detailed **here.** 503 The following dialog box will be displayed:
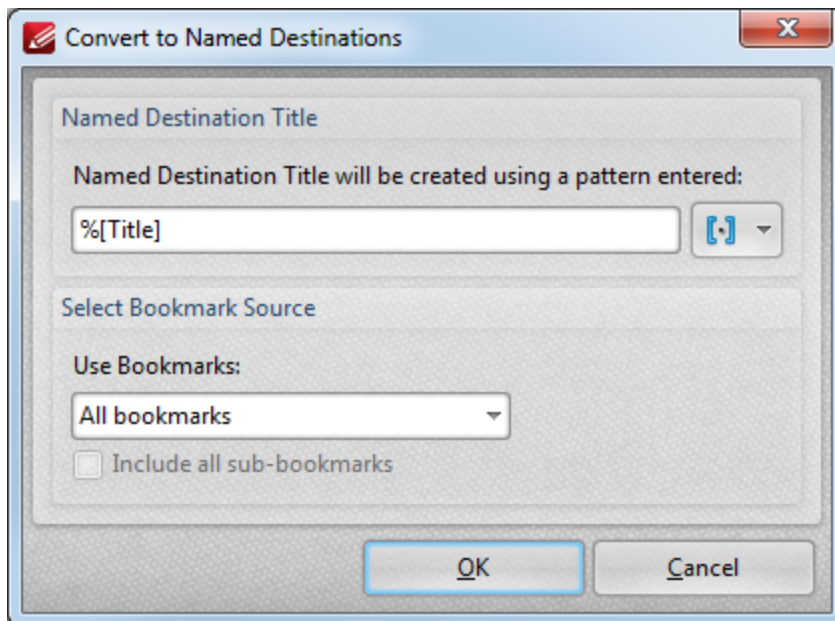
Figure 1. Convert to Named Destinations Dialog Box

- Enter the pattern of text that will convert to a named destination in the text box. Please note that **macros** 830 are available for this process.
- Use the **Use Bookmarks** menu to determine the bookmarks included in the process.
- Select the **Include all sub-bookmarks** box as desired.
- Click **OK** to save changes,

6.8.8 Convert Named Destinations to Regular Destinations

Convert Named Destinations to Regular Destinations

Click **Convert Named Destinations to Regular Destinations** to convert named destinations into regular destinations. The following dialog box will be displayed:
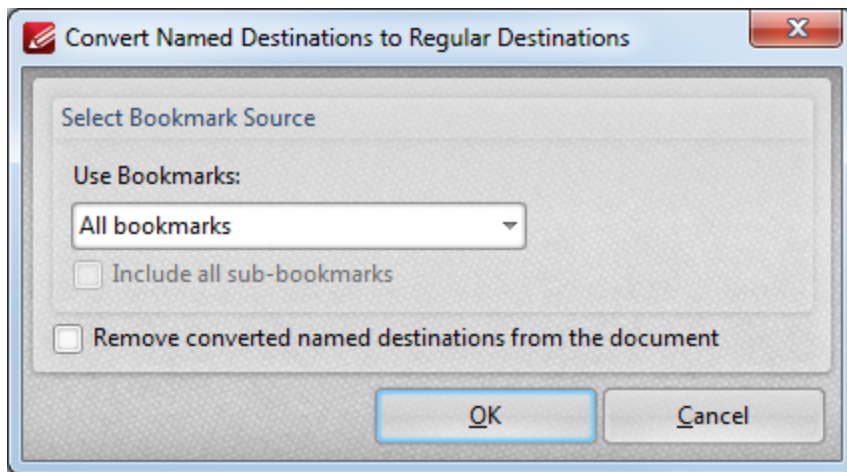
Figure 1. Convert Named Destinations To Regular Destinations Dialog Box

- Use the **Use Bookmarks** menu to determine the bookmarks included in the process.
- Select the **Include all sub-bookmarks** box as desired.
- Select the **Remove converted named destinations from document** box as desired.
- Click **OK** to save changes.

6.8.9   **Find and Replace Bookmark Text**

Find and Replace Bookmark Text

Click **Find and Replace Bookmark Text** to locate and replace elements of text to be used as bookmarks. The following dialog box will be displayed:
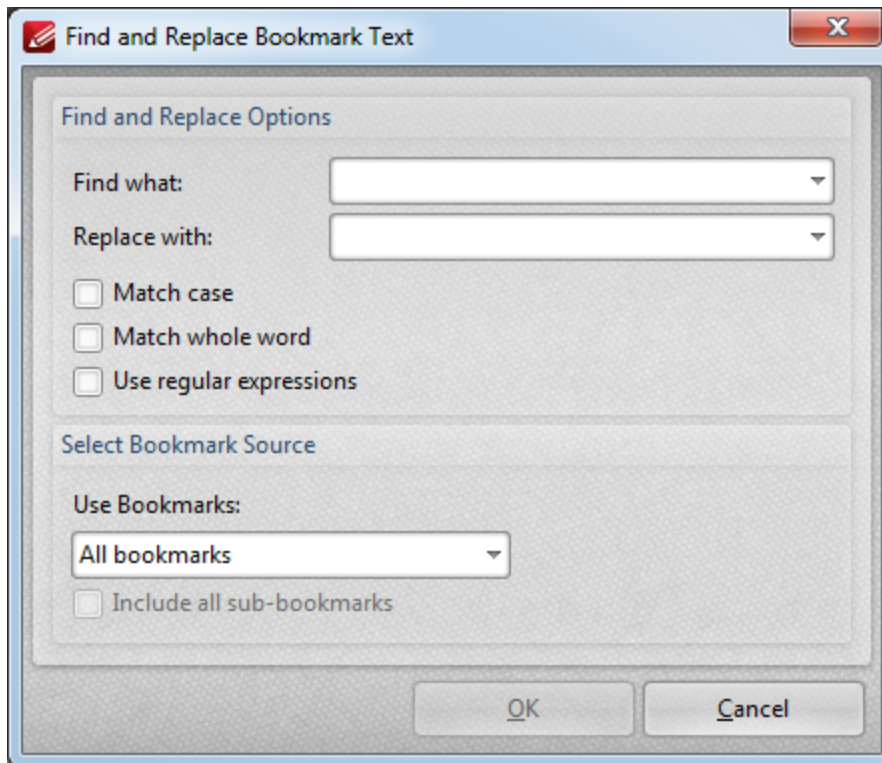
Figure 1. Find And Replace Bookmark Text Dialog Box

- Use the **Find What** menu to determine the words that will be included in the process.
- Use the **Replace with** menu to determine the words that will replace the words included in the **Find what** section.
- Select the **Match case** box to match the case of words.
- Select the **Match whole word** box to match the entire word.

- Select the **Use regular expressions** box to use regular expressions. A link will be added to the software shortly that will explain this option in more detail.
- Select an option from the **Use bookmarks** menu to determine the location from which bookmarks will be sourced.
- Select the **Include all sub-bookmarks** box as desired.
- Click **OK** to save changes.

6.8.10   Build Table of Contents

Build Table of Contents

Click **Build Table of Contents** to build a table of contents based on bookmarks. The following dialog box will be displayed:
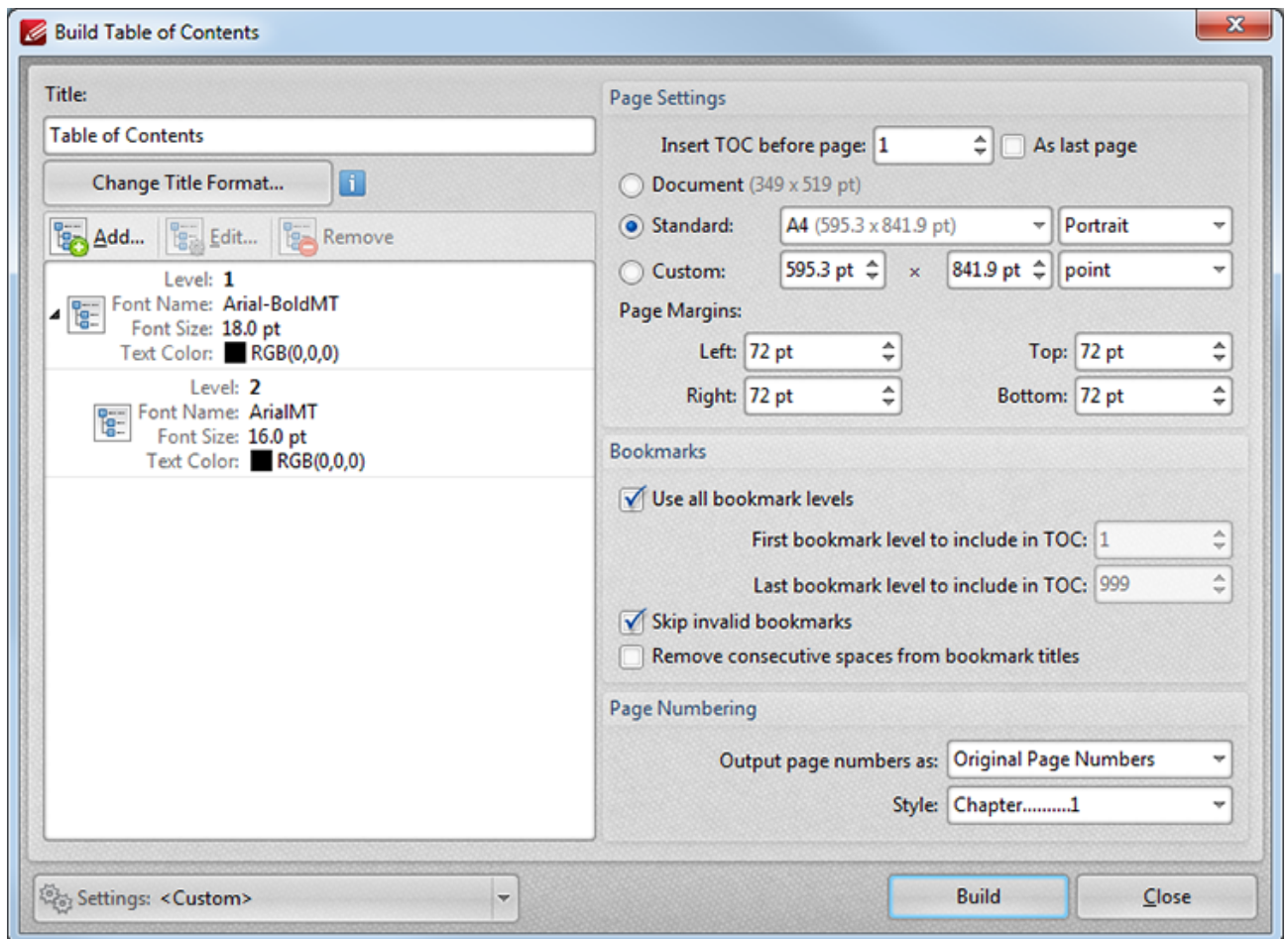
Figure 1. Build Table of Contents Dialog Box

- Use the **Title** text box to enter a title for the table of contents.
- Click the **Change Title Format** button to adjust the font parameters.
- The pane on the left displays the title formats available for use. Click **Add, Edit** and **Remove** to add, edit or remove formats.

- Use the **Insert TOC before page** number box to determine the location of the table of contents, or select the **As last page** box to locate it at the end of the document.
- Select one of the three option buttons to determine the dimensions of the table of contents:
  - **Document** is one of the standard sizes for documents.
  - The options in the **Standard** menu refer to standard sizes such as those used by the **ISO** and **ANSI.**
  - Select the **Custom** option button to enter custom dimensions.
- Use the **Page Margins** number boxes to determine the margins of the table of contents.
- Select the **Use all bookmark levels** to include all levels of bookmarks in the table of contents.
- Alternatively, use the number boxes to determine the first and last bookmark levels to be included.
- Select the **Skip invalid bookmarks** box as desired.
- Select the **Remove consecutive spaces from bookmark titles** box to rectify instances of consecutive white space.
- Use the **Output page numbers as** menu to determine the manner in which the pages of the table of contents are numbered.
- Use the **Style** menu to determine the style of the heading used for the title.
- When custom parameters have been determined, click the **Settings** menu to save them as a new profile. This menu can also be used to manage or delete existing profiles.
- When the desired settings have been selected, click **Build** to create the table of contents.

6.8.11   **Sort Bookmarks**

Sort Bookmarks

Click **Sort Bookmarks** to sort bookmarks. The following dialog box will be displayed:
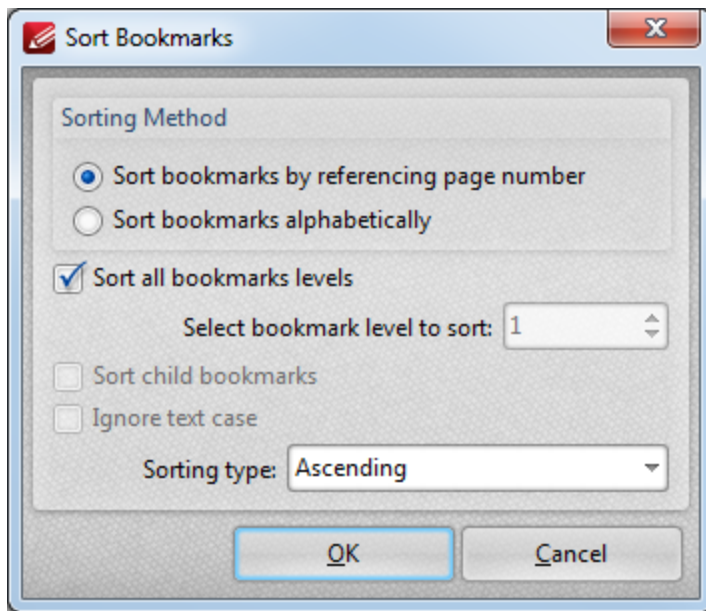
Figure 1. Sort Bookmarks Dialog Box

- Use the option buttons to determine if bookmarks are sorted according to their numerical or alphabetical element.
- Select the **Sort all bookmark levels** box as desired.
- Alternatively, use the number box to specify a bookmark level to be sorted.
- Select the **Sort child bookmarks** and/or **Ignore text case** boxes as desired.
- Use the **Sorting type** menu to select an either **Ascending** or **Descending** sorting type.
- When the desired parameters have been selected, click **OK** to sort bookmarks.

6.8.12 **Validate Bookmarks**

Validate Bookmarks

Click **Validate Bookmarks** to verify elements of bookmarks. The following dialog box will be displayed:
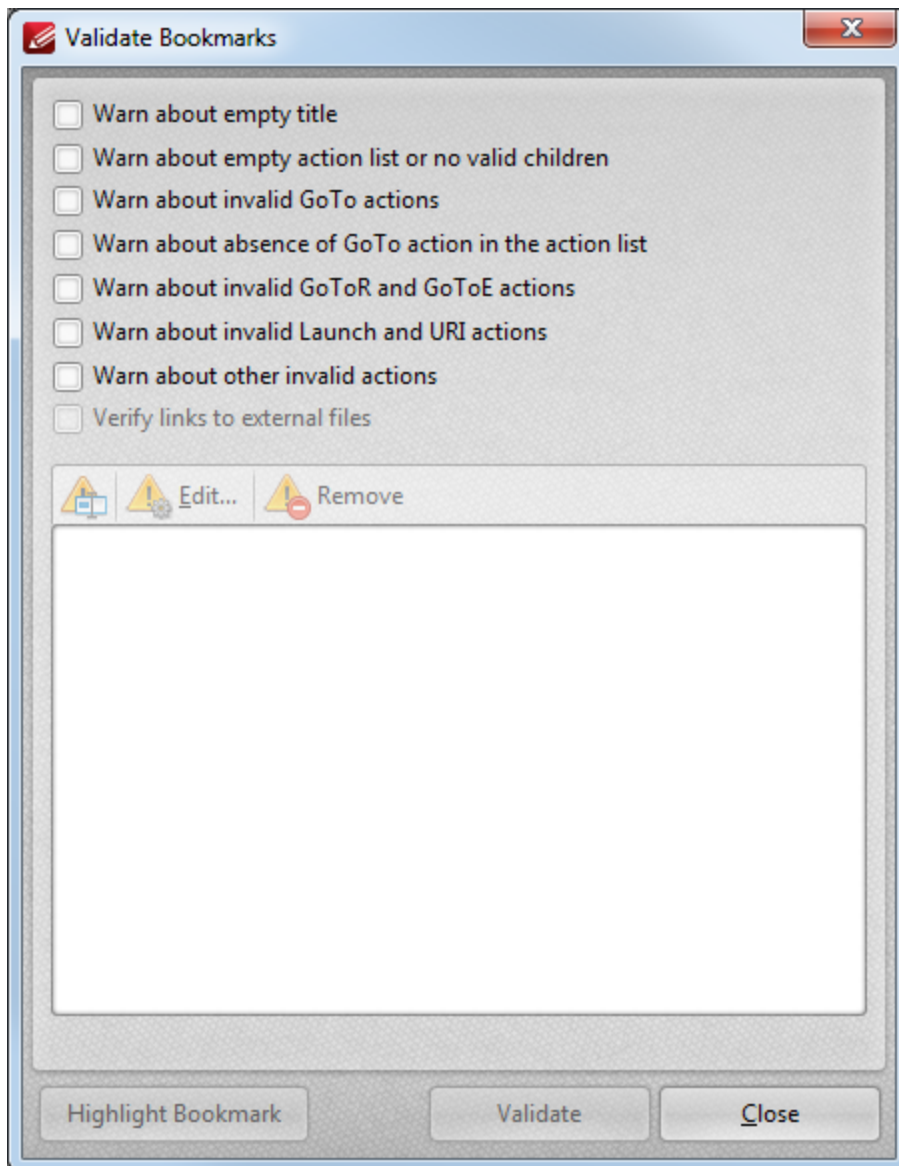
Figure 1. Validate Bookmarks Dialog Box

- Select the elements of the bookmark to be verified.
- When the desired elements have been selected, click the **Validate** button to verify that their conditions are met.

6.8.13   Export Bookmarks to HTML File

Export Bookmarks to HTML File

Click **Export Bookmarks to HTML File** to export bookmarks to HTML files. 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.

6.8.14   **Export Bookmarks to Text File**

 Export Bookmarks to Text File

Click **Export Bookmarks to Text File** to export bookmarks in text format. The following dialog box will be displayed:
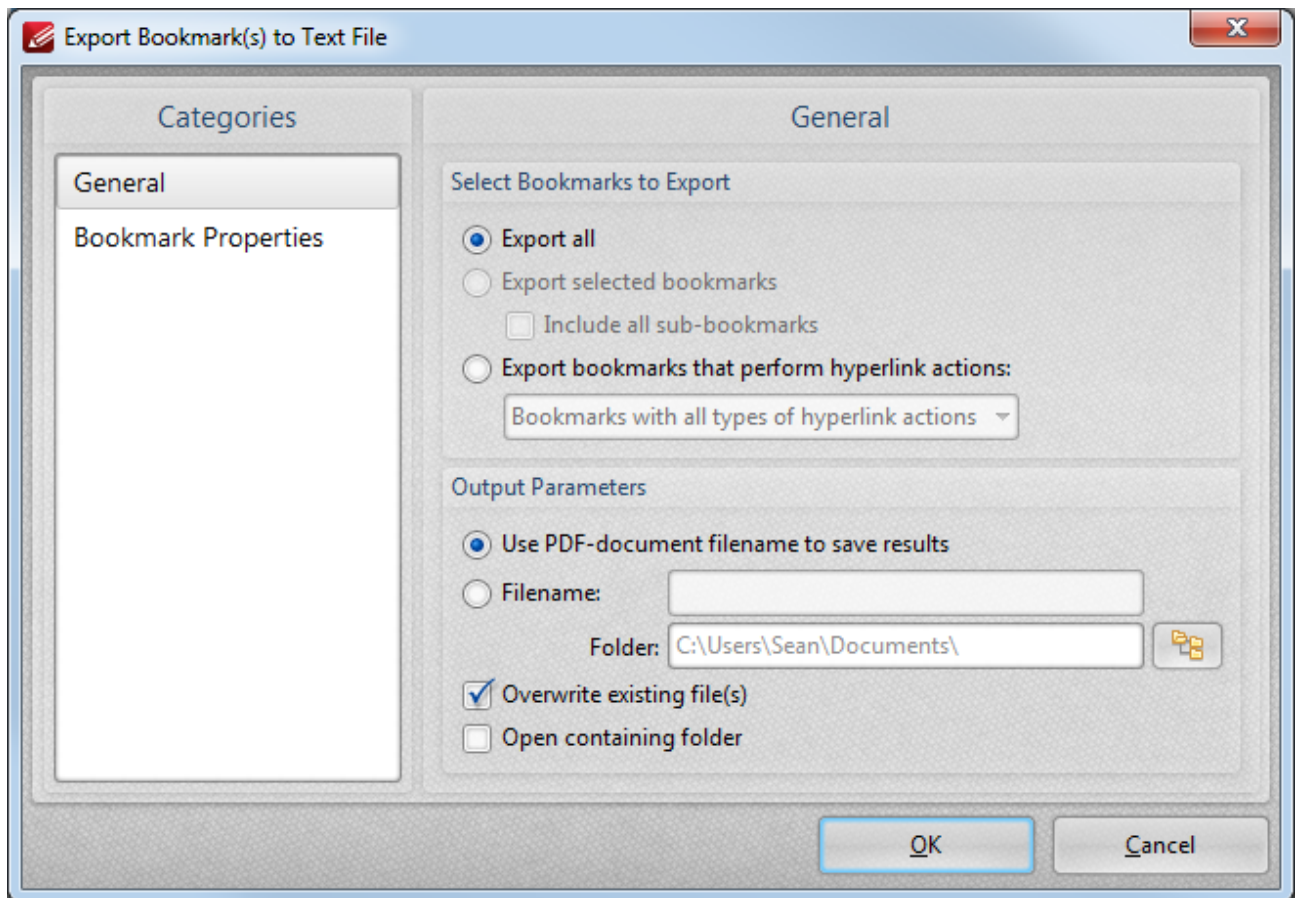
Figure 1. Export Bookmarks to Text File Dialog Box, General Tab Selected

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

- Select the **Export all** option button to export all bookmarks.
- Select the **Export selected bookmarks** option to export only the bookmarks currently selected. Select the **Include all sub-bookmarks** box to include child bookmarks.

- Select the **Export bookmarks that perform hyperlink actions** as desired. Select the desired actions from the menu.
- Select the **Use PDF-document filename to save results** option button to save output files using the same name as the document from which they came.
- Alternatively, enter a name in the **File Name** text box. Select the folder to which the output will be saved or use the icon to select a folder on the local computer.
- Select the **Overwrite existing files** box to replace files that feature the same name as that entered in the **File Name** text box.
- Select the **Open containing folder** box to open the containing folder after the process has taken place.
- When the desired parameters have been selected, click **OK** to export bookmarks.

The options in the **Bookmark Properties** tab determine the properties of the bookmark that are exported when the process takes place. When it is selected the following dialog box is displayed:
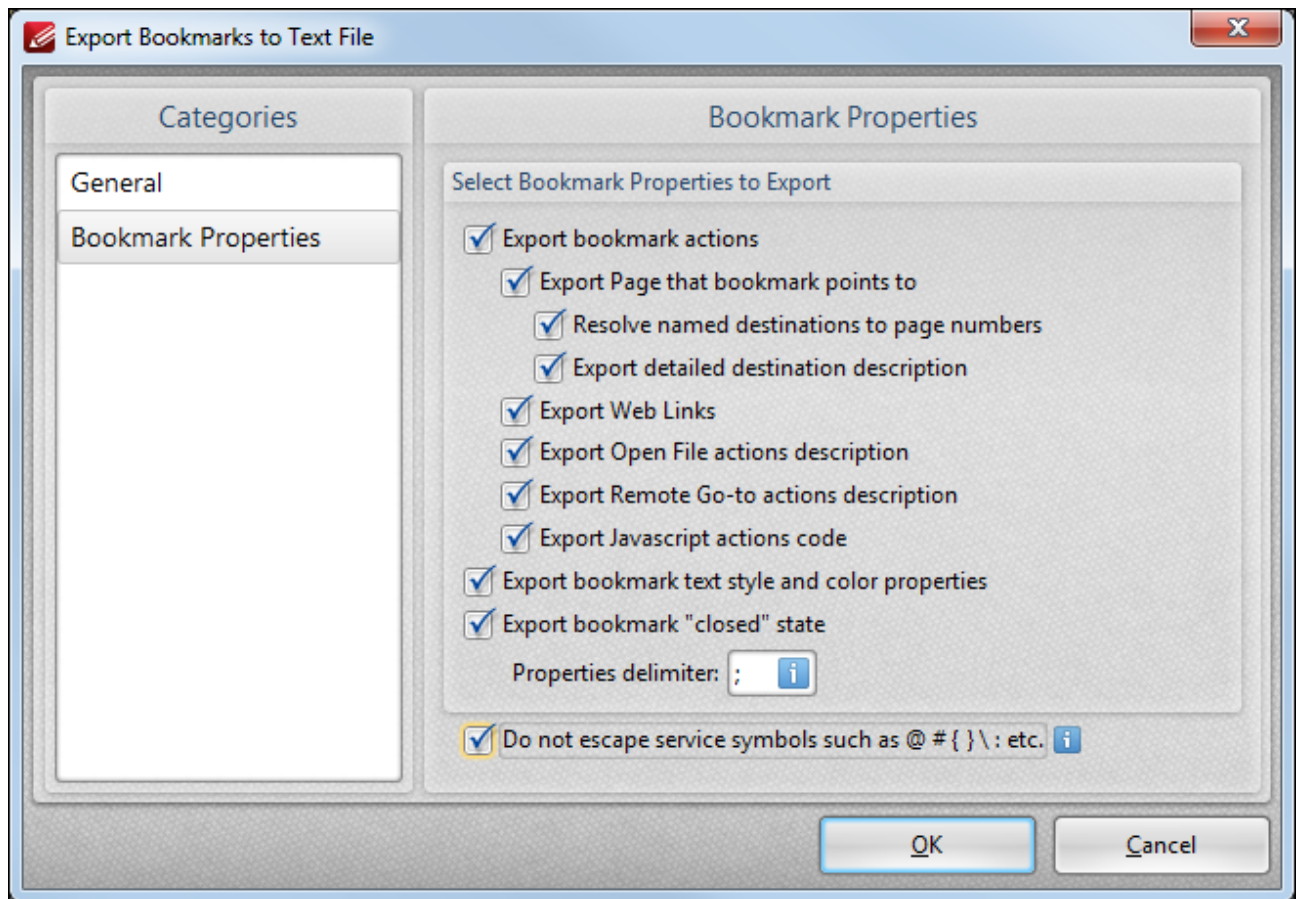
Figure 2. Export Bookmarks to Text File Dialog Box, Bookmark Properties Pane Selected

- Select the **Export bookmark actions** box to export actions associated with the selected bookmark and the properties of those actions.
- Select the **Export Page that bookmark points to** box to add the relevant page number to the bookmark's properties.

- Select the **Resolve named destinations to page numbers** box as desired. If the bookmark uses a named reference to a specific location within a document and this option is not enabled, then a named destination title will be exported instead of a page number.
- Select the **Export detailed destination description** box to export a destination with a greater level of description for the bookmark.
- Select the **Export Web Links** box as desired.
- Select the **Export Open File actions description** box to export a description of the "Open File" action to the text file. This is necessary to recreate the action subsequently.
- Select the **Export Remote Go-to actions description** box to export any paths that link to external files.
- Select the **Export Javascript actions code** to export document JavaScript.
- Select the **Export Bookmark text style and color properties** box as desired.
- Select the **Export bookmark "closed" state** box to export the bookmark in its closed state - i.e. with child bookmarks not displayed.
- Use the **Properties delimiter** box to determine the delimiter that separates the bookmark properties contained within the text file.
- Select the **Do not escape service symbols** box as desired.
- Click **OK** to save changes.

6.9 SharePoint

SharePoint

Hover over **Sharepoint** to open the following submenu:
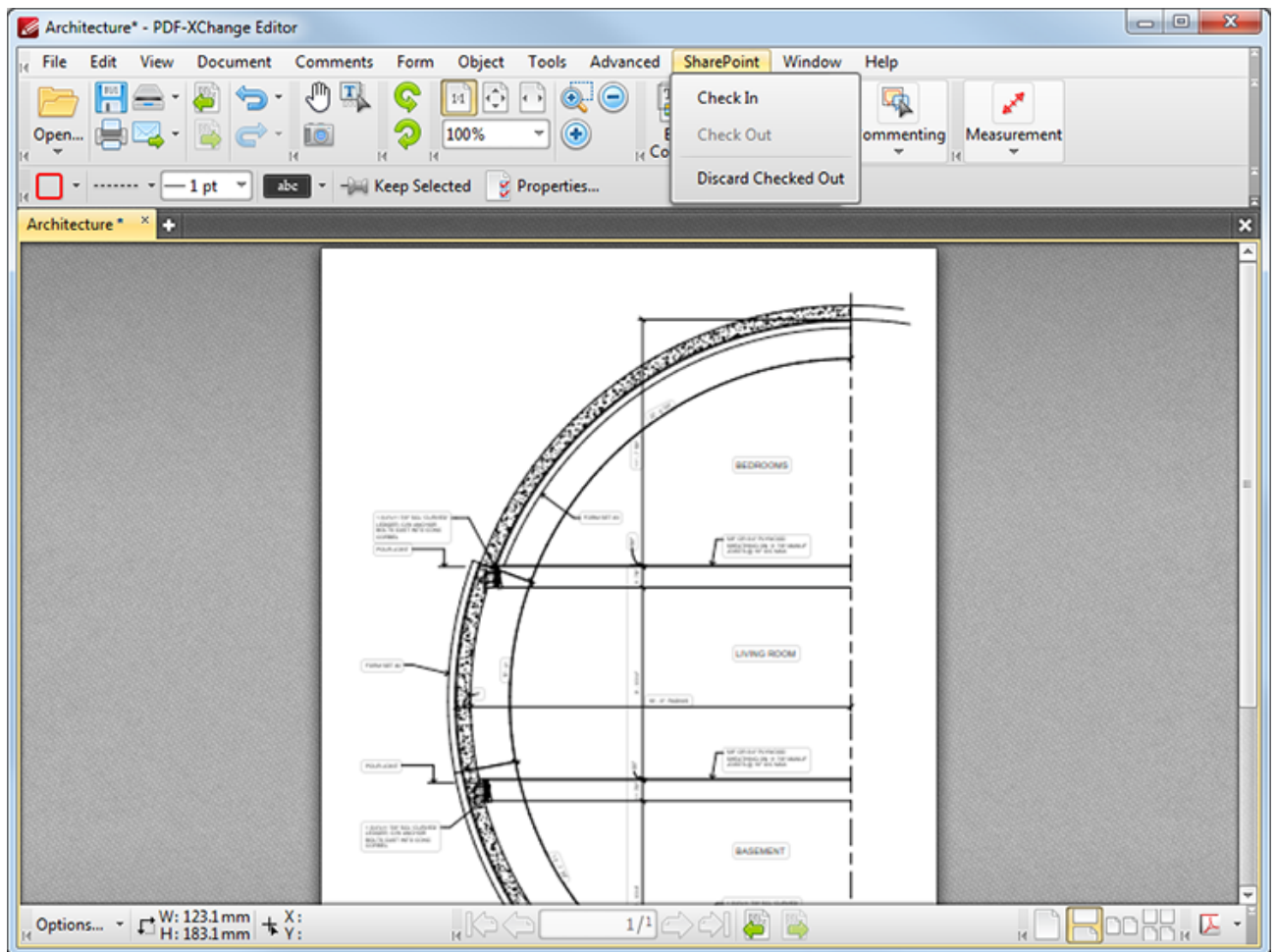
Figure 1. SharePoint Submenu

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.** 306

2. Hover over **Open From.**

3. Click **SharePoint.** The **Open File** dialog box will be displayed.

4. Enter the URL for the **SharePoint** file.

5. Click **Navigate.**

6. The **Authentication Required** dialog box will be displayed. Enter the SharePoint credentials of the associated account and click **OK.** The **Open File** dialog box will launch.

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 read-only for other users and editable only to the current user. See **here** for further information.

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6.10 Window

Window

Hover over **Window** to open the following submenu:
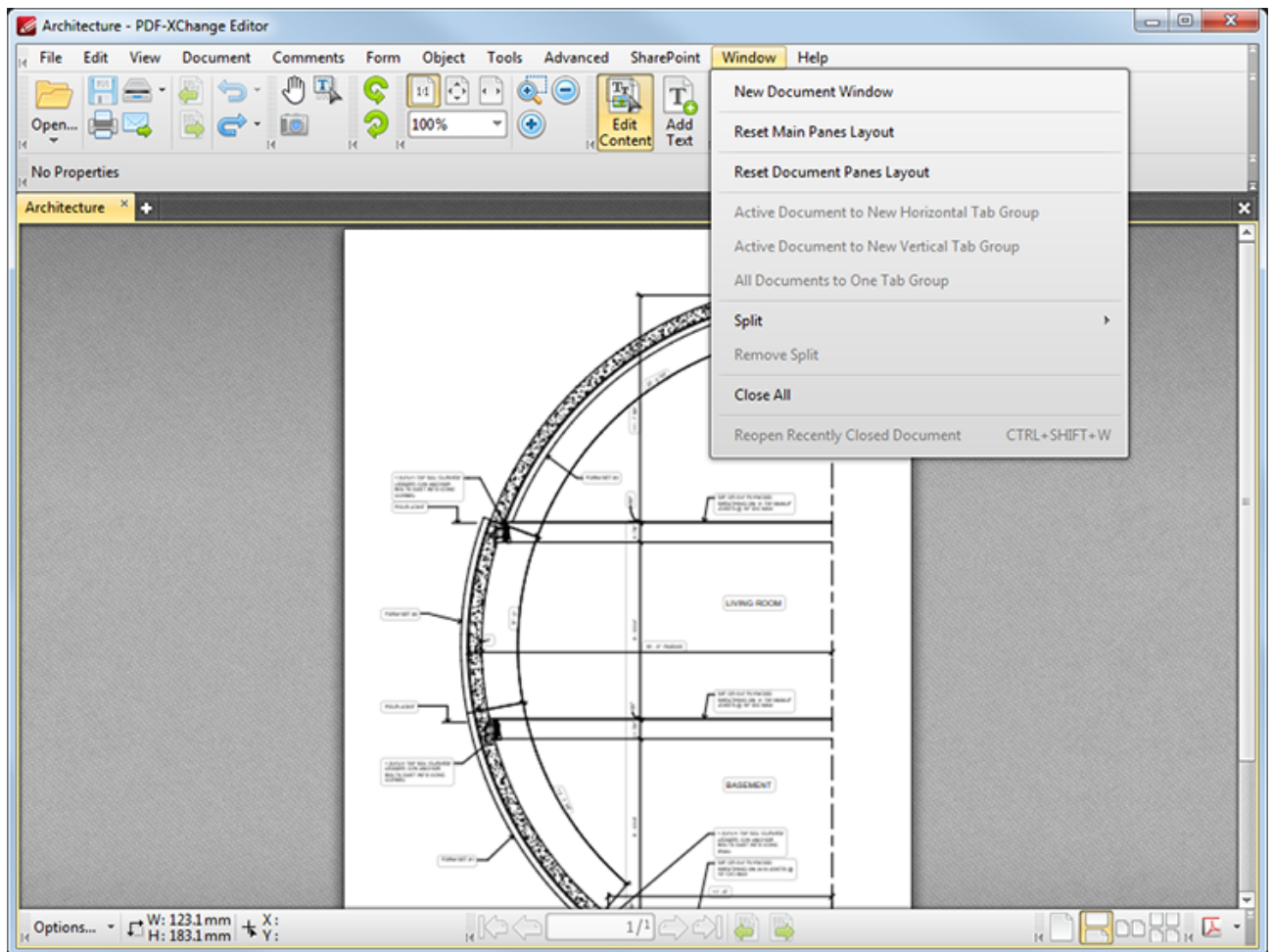
Figure 1. Window Tab Submenu

These options determine the settings associated with the **PDF-XChange Editor** viewing window**:**

- 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 setting.

- Click **Reset Document Panes Layout** to revert the layout of the document panes to their default setting.
- Click **Active Document Panes to New Horizontal Tab Group** to reposition all active documents in a horizontal manner. At least two documents must be active for this feature to function.
- Click **Active Document to New Vertical Tab Group** to reposition all active documents in a vertical manner. At least two documents must be active for this feature to function.
- Click **All Documents to One Tab Group** to revert either of the two processes outlined immediately above. One document will be displayed at a time and they will share a tab group in the main window.
- Click **Split** to duplicate the active document and reproduce it in either a horizontal or vertical manner.
- Click **Remove Split** to reverse the split process.
- Click **Close All** to close all active documents.
- Click **Reopen Recently Closed Document** (or press Ctrl+Shift+W) to reopen recently closed documents.

6.11 Help

Help

Hover over **Help** to open the following submenu:
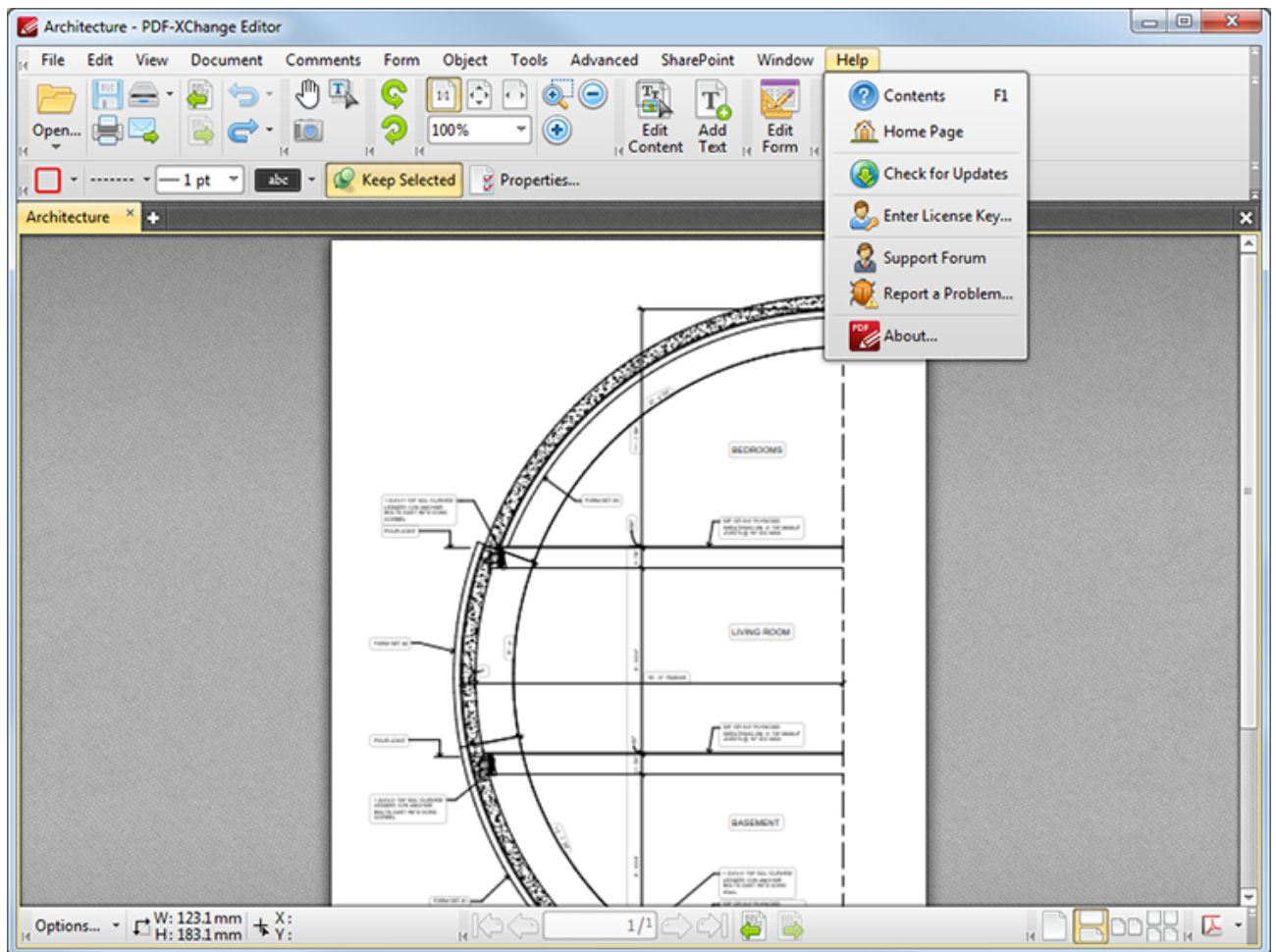
Figure 1. Help Tab Submenu

- Click **Contents** (or press F1) to access the contents page of the user manual for **PDF-XChange Editor.**
- Click **Home Page** to launch the home page of the **PDF-XChange** website.

- Click **Check for Updates** to check for updates to **PDF-XChange Editor** via the **PDF-XChange Updater.**
- Click **Enter License Key** to launch the **Registration** tab of the **Preferences** main window. It is then possible to add/update license keys. This process is explained **here.** 255
- Click **Support Forum** to access the **PDF-XChange** support forums, where it is possible to post and view queries about the software.
- Click **Report a Problem** to report bugs and other issues directly to **PDF-XChange.** The dialog box detailed below will open.
- Click **About** to view further details about **PDF-XChange Editor.**
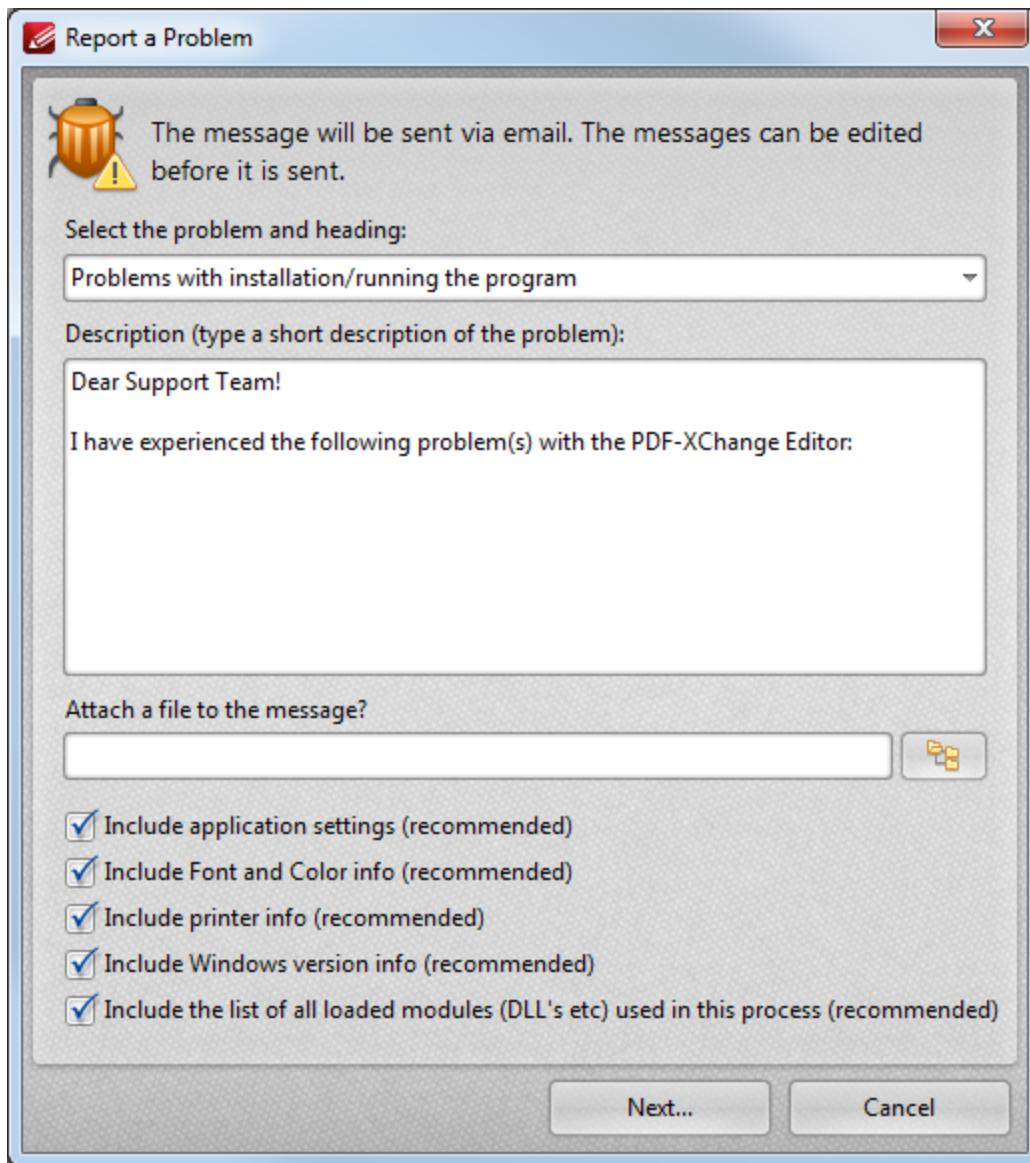
Figure 2. Report a Problem Dialog Box

- Use the menu to select the category of the difficulty that is being experienced.
- Use the **Description** text box to outline a description of the difficulty.

- Use the **Attach a file** text box to enter the name of additional files to be included with the report, such as screenshots, or click the icon to select files manually.
- Use the check boxes to determine the information that will be included with the report.
- Click **Next** to send the report.

7   Appendix

Appendix

This chapter details additional information relating to the settings and functions within **PDF-XChange Editor:**

- **Blend Mode** ⁷⁹⁴ - an explanation of how this mode works and the different blending modes available.
- **Command Line Options** ⁷⁹⁶ - a list of the available command line options.
- **Crop Margins** ⁸⁰⁵ - an explanation of how crop margins operate in PDF documents and how they are used in **PDF-XChange Editor.**
- **Editing Document Pages** ⁸⁰⁷ - a breakdown of the different manners in which the software can be used to edit pages.
- **Keyboard Shortcuts** ⁸¹⁴ - a table explaining available keyboard shortcuts for commands.
- **Macros** ⁸³⁰ - an explanation of what macros are and how they operate.
- **Page Range Settings** ⁸⁶⁰ - an explanation of available options when determining page ranges.
- **Read Out Loud Feature** ⁸⁶¹ - an explanation of this feature.
- **Shell Extensions** ⁸⁶² - an explanation of the shell extension and ifilter that operate in conjunction with **PDF-XChange Editor.**
- **Text Editing Options** ⁸⁶³ - an explanation of the text editing options available when using tools that feature text elements.
- **Tool Content Options** ⁸⁶⁵ - an explanation of all available options for content created using the **PDF-XChange Editor** tools.
- **Tool Properties** ⁸⁶⁹ - a table explaining all available properties for the tools that the software uses.

7.1   Blend Mode

Blend Mode

Blend Mode is a special option that many of the tools and commenting aids feature in **PDF-XChange Editor.** The **Blend Mode** option appears in the **Properties Toolbar** 484 when objects that are compatible with this mode are selected. The mode selected determines the manner in which content blends with underlying/overlapping content. The following options are available:
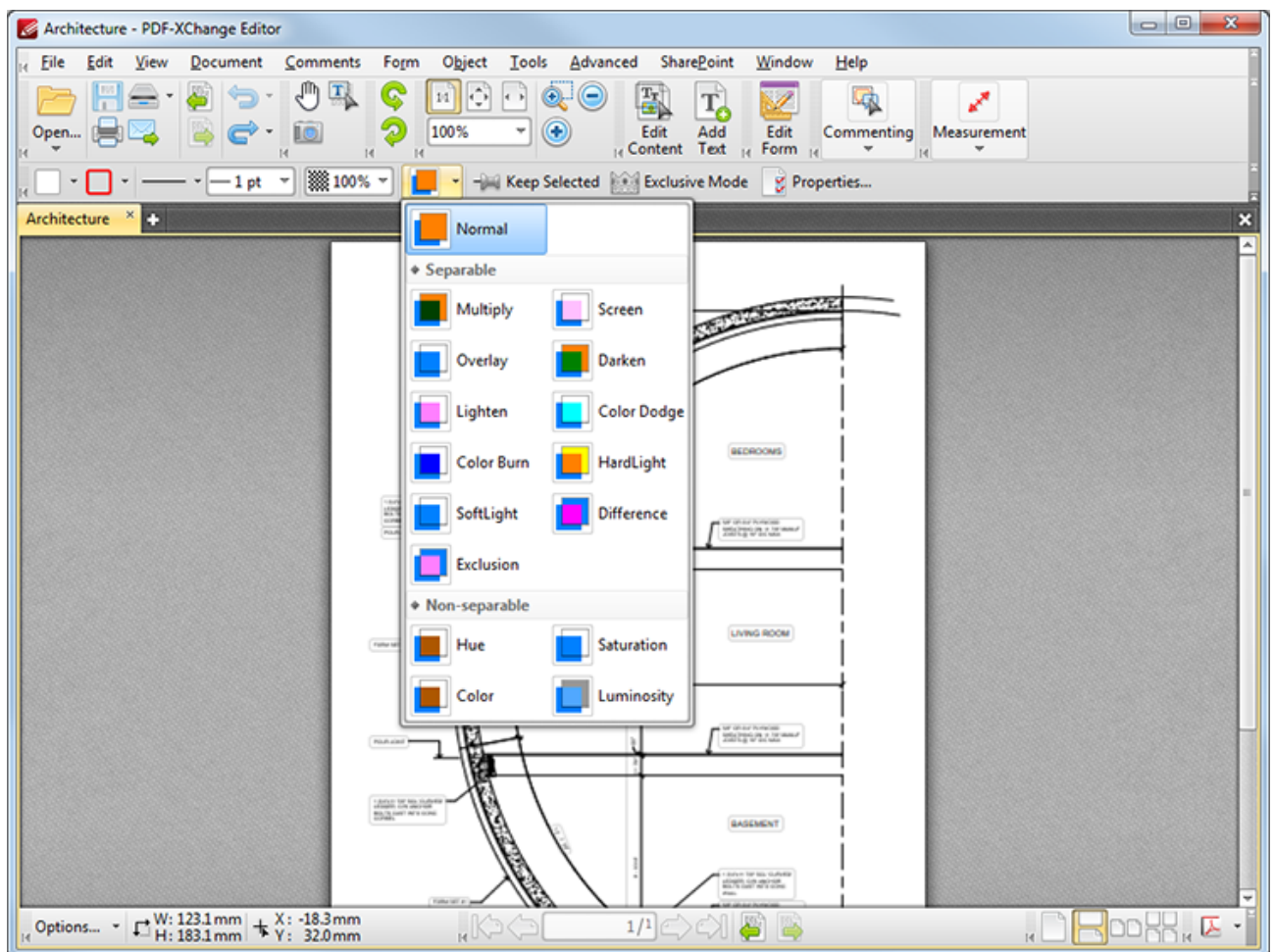
Figure 1. Blending Options

- **Normal** maintains the selected **Fill Color**.

- **Multiply** multiples the **Fill Color** value with the color value of the underlying content. The resulting color will be at least as dark as one of the original values.
- **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 original values.
- **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**. Please 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**. Please note that if white is used as the **Fill Color** then there will be no effect.
- **Hardlight** either multiplies 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 the 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.

7.2   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** contain 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** 860 for further information.

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.

Syntax

/exportsettings[:<parameters>] <filename>

Parameters

- **settings** – exports all application settings. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**.
- **stamps** – exports all custom stamps collections. Supported values are: **yes, no, 1, 0, true, false**. The default value is **false**.
- **history** – exports the opening history of the active document. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**.
- **pluginsdata** – exports the advanced plugins data. Supported values are: **yes, no, 1, 0, true, false**. The default value is **false**.

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 on the local computer created by the **/ExportSettings** command, or by the feature **Menu/Edit/Export Settings.** This can also be achieved via the feature **Menu/Edit/Import Settings.**

Syntax

> **/importsettings[:<parameters>] <filename>**

Parameters

- **settings** – imports all application settings. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**.
- **stamps** – imports all custom stamps collections. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**.
- **history** – imports the opening history of the active document. Supported values are: **yes, no, 1, 0, true, false, merge**. The default value is **true**. The **merge** value can be used to combine the history of the active document with new values during import.
- **pluginsdata** – import advanced plugins data. Supported values are: **yes, no, 1, 0, true, false**. The default value is **true**.

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"

/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 text file that contains the JavaScript.

Example

The following command line adds a 'Draft' stamp to all pages in the active document:

PDFXEdit.exe /runjs "c:\AddDraftStampToAllPages.txt" "c:\example.pdf"

/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

7.3 Crop Margins

 Crop Margins

PDF documents feature up to five boxes that determine their content and appearance. They are the **Media Box, Crop Box, Bleed Box, Trim Box** and **Art Box:**
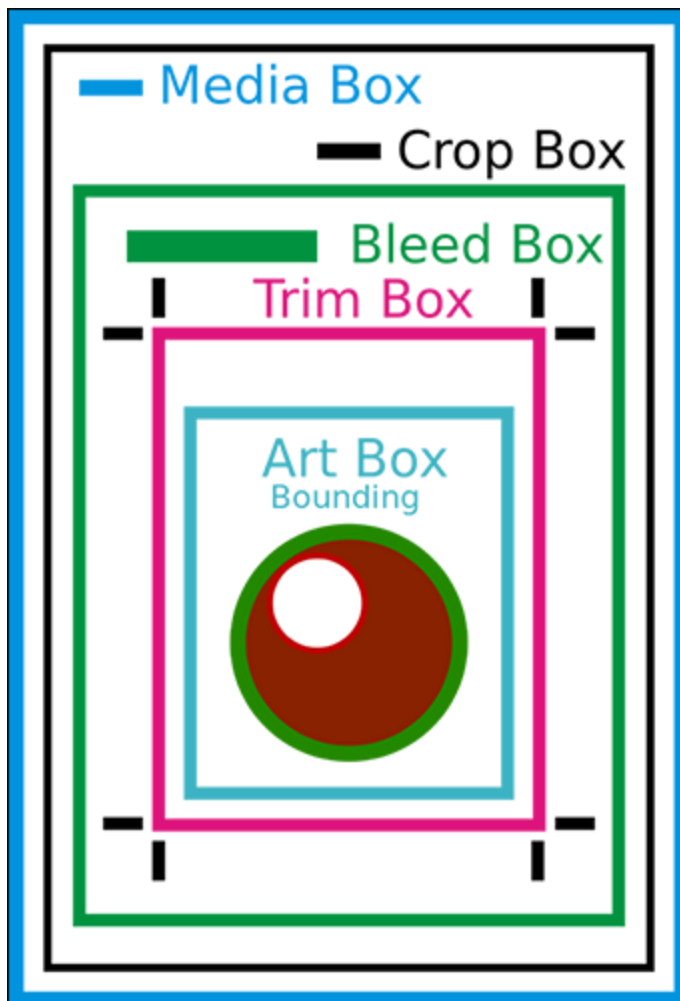
Figure 1. Document Boxes

PDF-XChange Editor uses four of these boxes to determine customizable settings:

Crop Box

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

Bleed Box

The **Bleed Box** defines the region to which the contents of the page 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 for the **Bleed Box** is the page's **Crop Box.**

Trim Box

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

Art Box

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

See **here** for further information on document boxes.

7.4   Editing Document Pages

![PDF icon] **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 the original PDF content, such as text and/or images. The second layer, which goes over the first, consists of comments and/or markups added to the document using the software. These layers exist and operate independently of each other. This means that editing commands applied to original PDF content/comments and markups will apply only in relation to the layer in which selected items are located. When comments and markups are flattened they are moved to the same layer as original PDF content and can then be edited simultaneously. The menu detailed **here** 865 can be used to flatten comments.

The **Edit Documents** 73 page contains comprehensive, step-by-step instructions on how to edit documents. Additionally, many of the operations detailed below feature convenient keyboard shortcuts. See **here** 814 for a comprehensive list of available shortcuts.

The following tools are available in **PDF-XChange Editor** for editing pages:

- The **Edit Content Tool** 808 is used to select/edit original document content such as images and text. See below for further information.
- The **Add Text Tool** 656 is used to add text to original document content.
- The **Edit Form Tool** 812 is used to select/edit forms that it has been used to create, and can also be used to select/edit comments and markups created using the software.
- The **Edit Comments Tool** 661 is used to select/edit comments and markups that users have added to documents.

These tools can be selected in the **Shortcut Toolbar:** 301
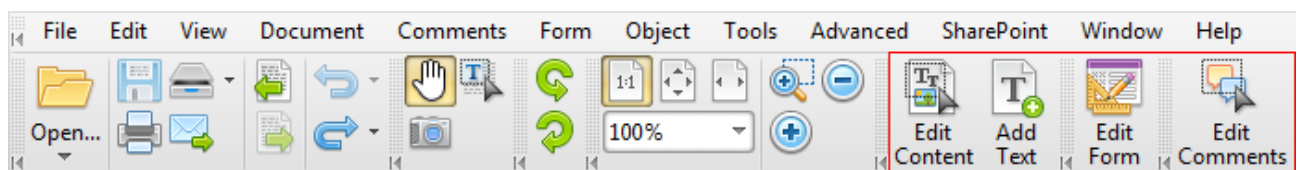
Figure 1. Shortcut Toolbar, Editing Tools Highlighted

Please note that the **Content pane**⌐505⌐ provides several simple and effective methods to summarize, view and edit page content.

The **Edit Content Tool** is used to edit existing PDF content. When it is selected the active document is divided into editable content items based on the images and text it contains. Click to select content items. (Alternatively, click and drag the pointer to specify an area as opposed to a content item. All content items within the area will then be selected and updated simultaneously). Selected items appear as below:
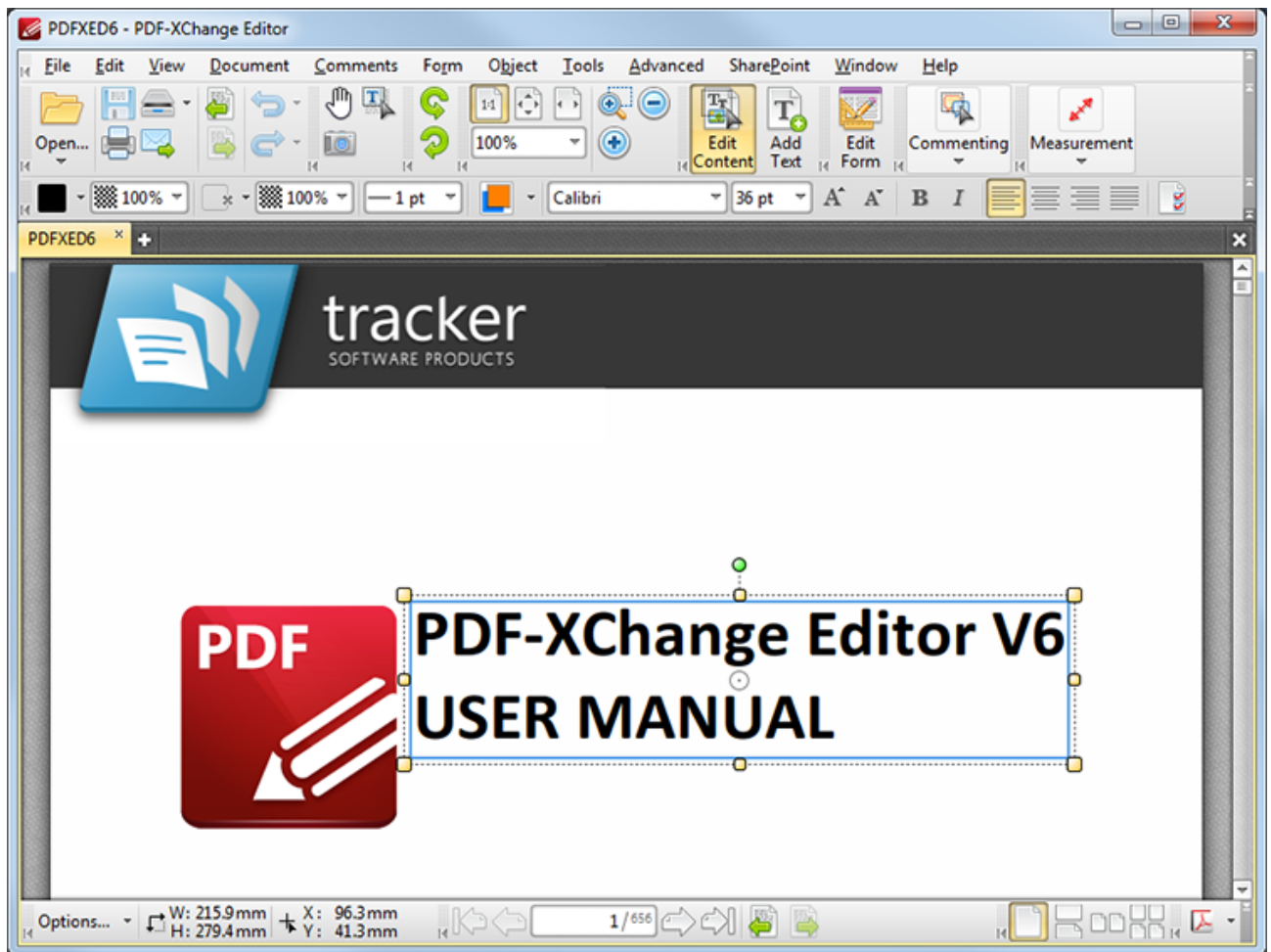
Figure 2. Selected Content Item

- 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**⌐525⌐ to assist in the precise placement of document content.

- The main properties of selected content items are detailed in the **Properties Toolbar** 484 and can be edited as desired. Available properties depend on the format of selected content.
- Click **Properties** in the **Properties Toolbar** 484 to open the **Properties** 224 pane and view/edit further properties.
- Right-click selected content for further options. Available options depend on the format of selected content. The menu below contains all options:
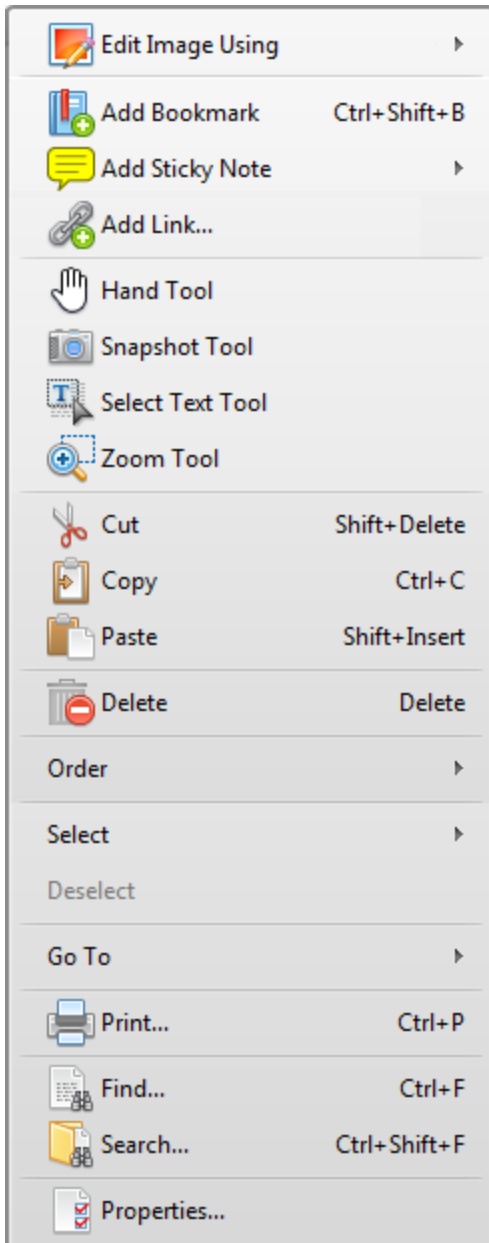
Figure 3. Right-Click Options Menu

- Hover over **Edit Image Using** to edit selected images in third-party applications:
  - Click **Default Application** to edit images in the default application for editing images.
  - Click **Open With** to select a program with which to edit images.

- Select **Ignore Transformations When Editing Image** to edit images as they appeared when they were first placed in the document.
- Click **Add Bookmark** to add a bookmark at the selected location. See **here** ⁴⁹³ for further information.
- Click **Add Sticky Note** to add a sticky note at the selected location. See **here** ⁶⁶⁴ for further information.
- Click **Add Link** to add a link to an external source from the selected object. See **here** ⁷³⁶ for further information.
- Click **Hand Tool, Snapshot Tool** or **Select Text Tool** to enable these tools. See **here** ⁶³⁴ for further information.
- Click **Zoom Tool** to enable the **Zoom Tool.** ⁶⁴³
- Click **Cut, Copy, Paste** or **Delete** to perform these operations on selected content.
- Hover over **Order** to determine how content appears in relation to overlapping content:
  - Select **Bring to Front** to bring content to the front in cases of multiple objects overlapping.
  - Select **Send to Back** to send content to the back in cases of multiple objects overlapping.
  - Select **Bring Forward** to bring content to the front in cases of two objects overlapping.
  - Select **Send Backward** to send content to the back in cases of two objects overlapping.
- Hover over **Select** to select specific document elements:
  - Click **All** to select all content items.
  - Click **Text** to select all document text.
  - Click **Images** to select all document images.
  - Click **Shapes** to select all document shapes.
- Click **Deselect** to deselect the content item currently selected.
- Use the **Go To** options to move to specific document pages, or to move between documents when multiple documents are open.
- Click **Print** to print the active document. The **Print** dialog box will open. See **here** ¹⁹⁸ for further information.
- Click **Find** to launch the find text function. See **here** ²¹⁷ for further information.
- Click **Search** to launch the **Search** function. See **here** ²¹⁹ for further information.
- Click **Properties** to open the **Properties** pane. See **here** ²²⁴ for further information.

If selected content contains text then click to enable text editing. Right-click when editing text to launch the following menu:
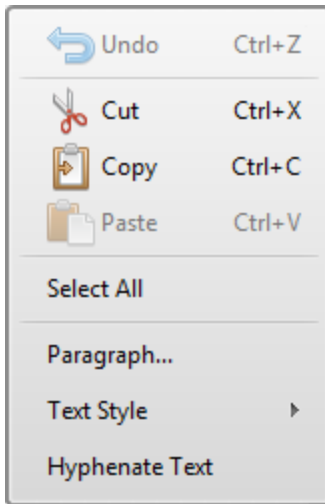
Figure 4. Editing Options

• Click **Undo** to reverse the most recent action.
• Click **Cut** to remove selected text and copy it to the clipboard.
• Click **Copy** to copy the selected text to the clipboard.
• Click **Paste** to paste the clipboard text to the selected location.
• Click **Select All** to select the whole text from the chosen text box for editing.
• Click **Paragraph** to launch the **Paragraph Options** dialog box, which is explained in *(figure 4)* below.
• Click **Text Style** to determine text style options. The options are as follows:
   • **Bold**
   • **Italic**
   • **Underline**
   • **Superscript,** which transforms selected text into superscript that is used in special cases such as chemical compounds.
   • **Subscript,** which transforms selected text into subscript that is used in special cases such as mathematical formulae.
   • **Clear Text Formatting,** which clears any formatting that has taken place on selected text.
   • **Make Current Text format Default,** which sets the format of selected text as the default text format for subsequent text.
   • **Apply Default Text Format,** which applies the default text format to selected text.
• Select the **Hyphenate Text** option to automatically hyphenate text. This means that text will be hyphenated automatically when it reaches the margin.
• Please note that if the selection contains spelling mistakes then alternatives will be offered automatically in this menu. Click alternatives to update the selection.
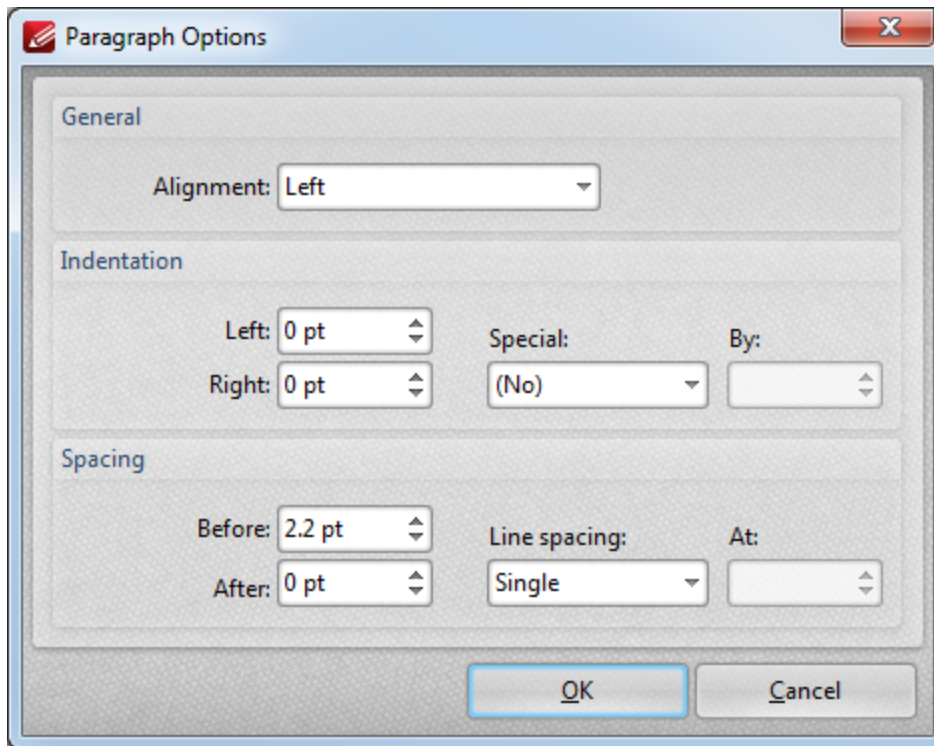
Figure 5. Paragraph Options

- Use the **Alignment** menu to determine the alignment of the paragraph.
- Use the **Indentation** number boxes to determine the indentation from the left and right margins.
- Use the **Special** and **By** menus to determine the **Hanging** options.
- Use the **Spacing** options to determine the line spacing.

Click **OK** to save settings.

Editing Forms

When the **Edit Form** button is selected in the **Shortcut Toolbar,** ⟦301⟧ right-click documents to launch the following menu:
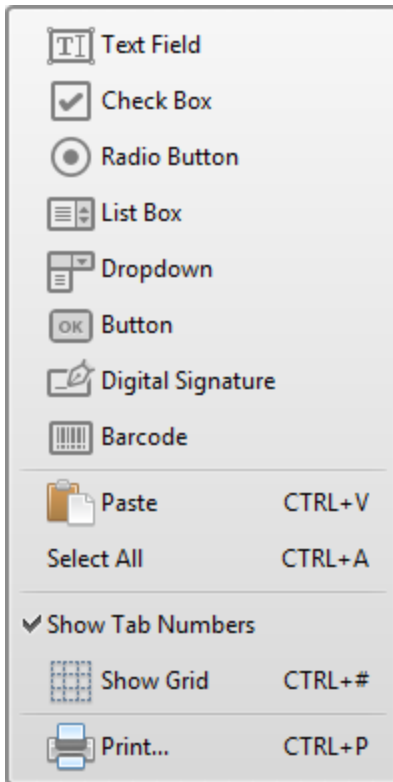
Figure 6. Right-Click Menu Options

- Click the options in the upper section of the menu to add interactive fields to documents. These are detailed **here.** 320
- Click **Paste** to paste the current clipboard content into the document.
- Click **Select All** to select all forms.
- Click **Show Tab Numbers** to display the tab numbers of forms. The order in which forms are created determine their tab number.
- Click **Show Grid** to display a grid beneath page content in order to facilitate the accurate alignment and editing of page content. Use the **Measurement** 261 tab in the **Preferences** 229 dialog box to determine grid settings and layout.
- Click **Print** to launch the **Print** dialog box, which determines print settings. These settings are explained **here.** 198
- The **Forms Guide** 121 contains further information and step-by-step instructions about using forms.

7.5   Keyboard Shortcuts

Keyboard Shortcuts

PDF-XChange Editor supports a number of keyboard shortcuts that can be used to activate commands. They are detailed below:

COMMAND	SHORTCUT
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.** 514	Ctrl+M
Contents Launch online manual.	F1
Copy Copy the selection to the clipboard.	Ctrl+C

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	F3

Move to the next found item. (This is intended for use with the **Find** [217] feature).	
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** [217] 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.** [116]	"Num *"
Italic Italicize selected text.	Ctrl+I
Justify Text	Ctrl+J

Justify selected text.	
Last Page Move to the final page of the document.	End
Layers Show/Hide the Layers pane. The Layers pane shows the structure of the document's layers, allowing for their visibility to be altered.	Ctrl+L
Menu Toolbar Show/Hide the **Menu Toolbar.** 306	F9
Move Down Move the selected bookmark(s) down.	Alt+Down
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	Alt+Insert

Creates a new bookmark before the selected bookmark. If no bookmark is selected then a new one is 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	Ctrl+Shift+6

Display document colors according to the selected color scheme.	
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	Ctrl+`

Show/Hide the **Properties** pane for the selected object(s).	
Properties Toolbar Show/Hide the **Properties Toolbar.** [484] Please note that the contents of this toolbar depends on selected content and/or active tool.	Ctrl+E
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	Ctrl+Shift+"Num+"

purposes - the original document is not modified.	
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	Ctrl+Shift+G

Show/Hide gaps between pages.	
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** 261 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

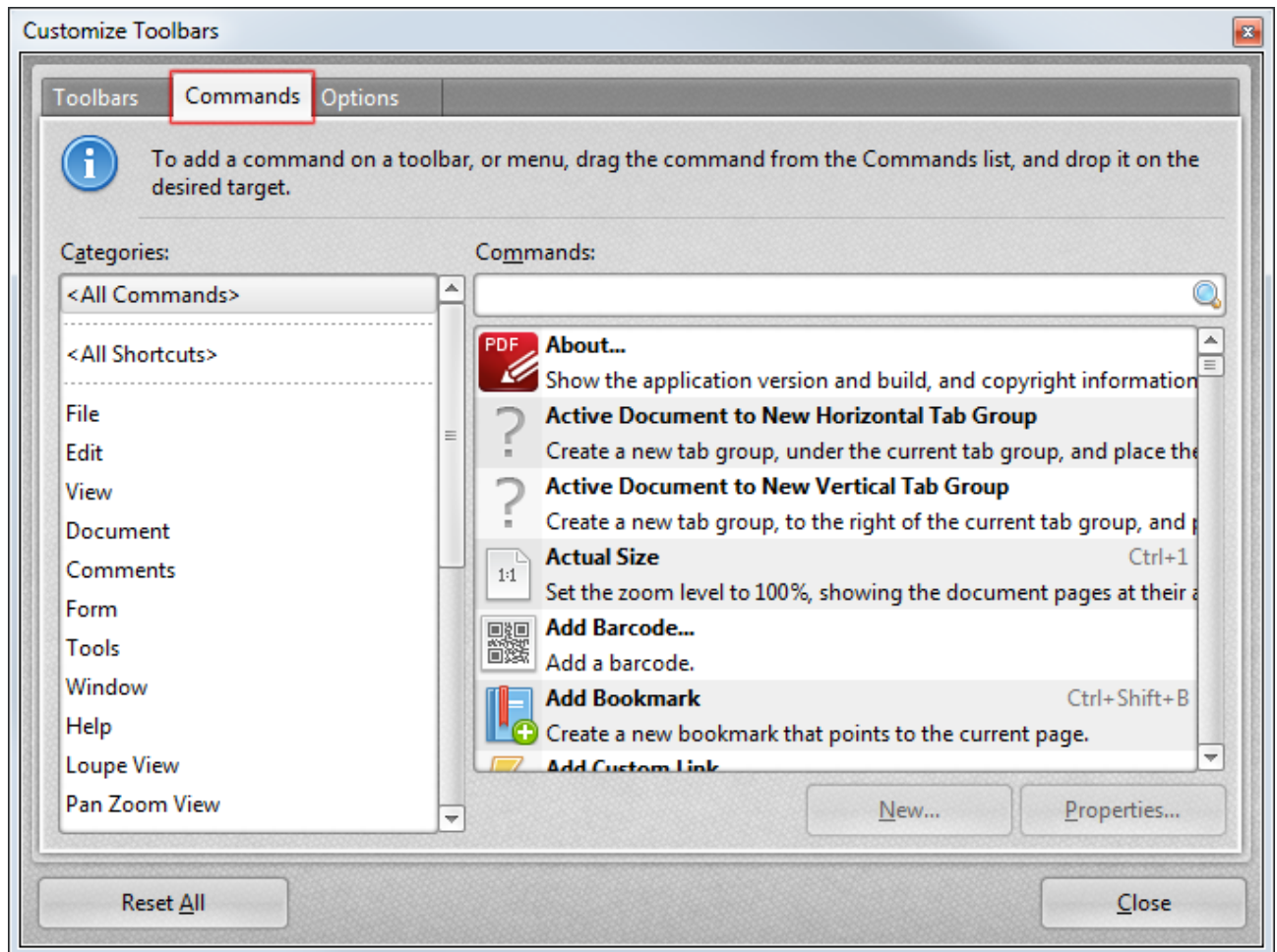|	

Keyboard shortcuts can be viewed/edited as follows:

1. Click the **View** the **Menu Toolbar.** 306

2. Hover over **Toolbars**.

3. Click **Customize Toolbars:**
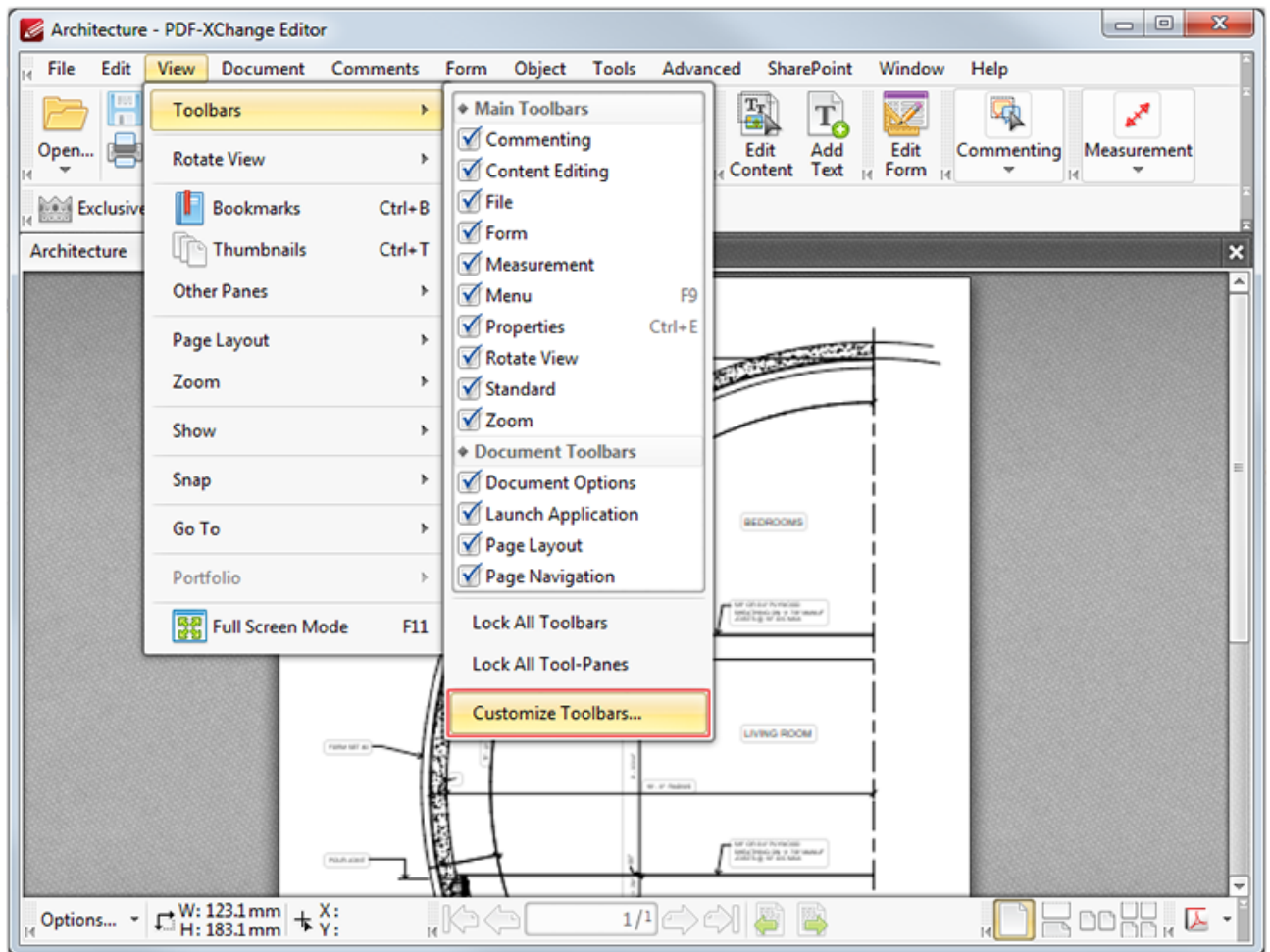
4. The **Customize Toolbars** dialog box will open. Click the **Commands** tab:

5. Use the **Categories** submenu to select a section of the software. (The default selection is **<All Commands>,** which means all available keyboard shortcuts are displayed). When sections are selected their actions and associated keyboard shortcuts will be displayed in the list on the right.

6. Select actions and click **Properties** to view additional information. The **Command Properties** dialog box for the **Add Bookmark** function is detailed below:
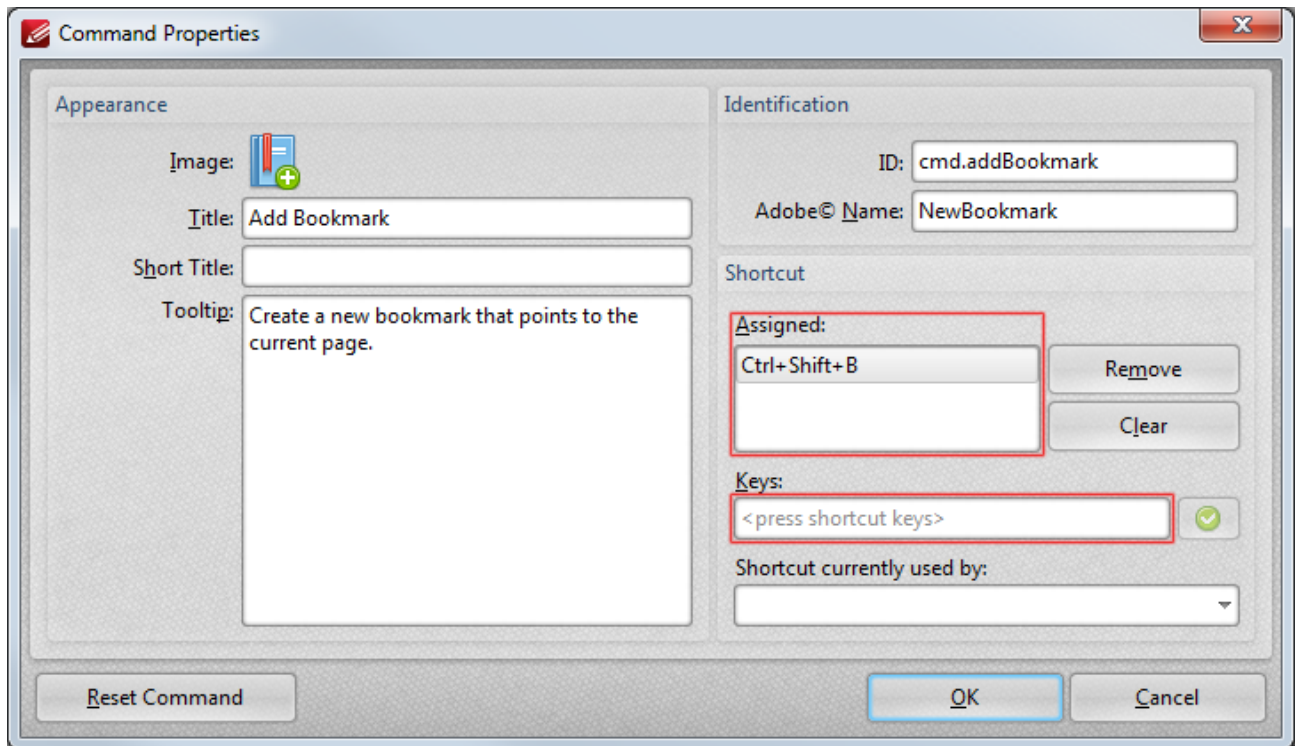
7. Assigned shortcuts are detailed in the **Assigned** pane. Use the **Keys** text box to determine new shortcuts and then press **OK.** (Please note that if entered key combinations are already in use then the associated feature will be displayed in the **Shortcut currently used by** text box).

7.6   Macros

Macros

Macros are used in several of the tools and actions of **PDF-XChange Editor.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule or pattern that specifies how an input sequence of characters should be mapped to create a corresponding output sequence. This means that components of the output process can be reduced in the input process, making the work involved both less intensive and less error-prone. Input macros usually relate to the names of saved files - I.e. macros are used in the file name when saving files and the name of the resulting file updates with the information that corresponds to the macro.

When macros are available the ⟦⋯⟧ icon is visible next to the **Save File** dialog box. See **here** 856 for a list of macro-enabled operations. Click the icon and select the macro from the list to add it to the file name.

The macros available in **PDF-XChange Editor** are used predominantly when saving stamps, watermarks and other documents. The format for macros is:

%[<Macro Name>] or, when it is customizable: **%[<Macro Name>:<Parameter>]**. The **<Parameter>** step is optional. All macros are detailed below:

- **Document Title** 832
- **Document Index** 834
- **Document Info** 833
- **Page Number** 836
- **Number of Pages** 837
- **File Name** 838
- **Folder Name** 839
- **Date** 840
- **Year** 841
- **Month** 842
- **Day** 843
- **Time** 844
- **Hour** 846

- **Minute** [847]
- **Seconds** [848]
- **Computer Name** [849]
- **User Name** [850]
- **Environment Variable,** [851] which has multiple options relating to the **environment variables** of the file.
- **Auto Number** [853]
- **Application Version** [854]

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

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.

7.6.1 **Document Title**

Document Title

The **Document Title** macro uses the name **DocTitle** and represents the existing document title. This value can be specified in the document's **initial view.** [209] This macro can be used in conjunction with PDF documents only and uses one of the following values:

- The file name without extension (if the file name is determined using the **Show in Title** option available in the Window Options section of the **initial view** [209] settings).
- The Document Title from the Document Title field in the Description tab of the **Document Properties** [204] dialog box. (If this value is missing then the first option is used).

The syntax for this macro is **%[DocTitle]**

For example:

- The file name is "articles.pdf".
- The document title is "ACDSee PDF Image.".
- The **Show in Title** field is set as 1) Document Title; 2) File Name.

A watermark created subsequently using the **DocTitle** macro will produce: 1) "ACDSee PDF Image."; 2) "articles".

Document Info

Document Info

The **Document Info** macro uses the name **DocInfo** and retrieves information about the document from the document's properties. It can be used with PDF documents only.

The syntax for this macro is **%[DocInfo:<Parameter>]**

Available parameters are detailed below:

- **Title** retrieves information from the **Document Title** field.
- **Author** retrieves information from the **Author** field.
- **Subject** retrieves information from the **Subject** field.
- **Keywords** retrieves information from the **Keywords** field.
- **Creator** retrieves information from the **Creator** field.
- **Producer** retrieves information from the **Keywords** field.
- **CreationDate** references the date when the document was created.
- **ModeDate** references the date when the document was modified.
- It is also possible to enter custom parameters. For example, entering the macro **%[DocInfo:Trapped]** will display the current setting for the "trapped" option specified **here.** [210] Additionally, if parameters have been specified using the JavaScript console and custom names have been used to replace the standard names, then the custom names can be used as parameters for this macro.

7.6.3 **Document Index**

Document Index

The **Document Index** macro uses the name **DocNumber** and displays the index value of a file within a group of input/output files. It is useful when adding/extracting several files to/from a PDF document.

The syntax for this macro is **%[DocNumber: <Parameter>]**

The parameter indicates the minimum amount of digits for the page number and must be a positive integer. For example, if the <parameter> is entered as "4" the indexes will be "0001, 0002, 0003" etc.

This macro can be used in the **Image Labels** option of the **Images to PDF** dialog box, which is located **here.** [181] When it is open it appears as below:
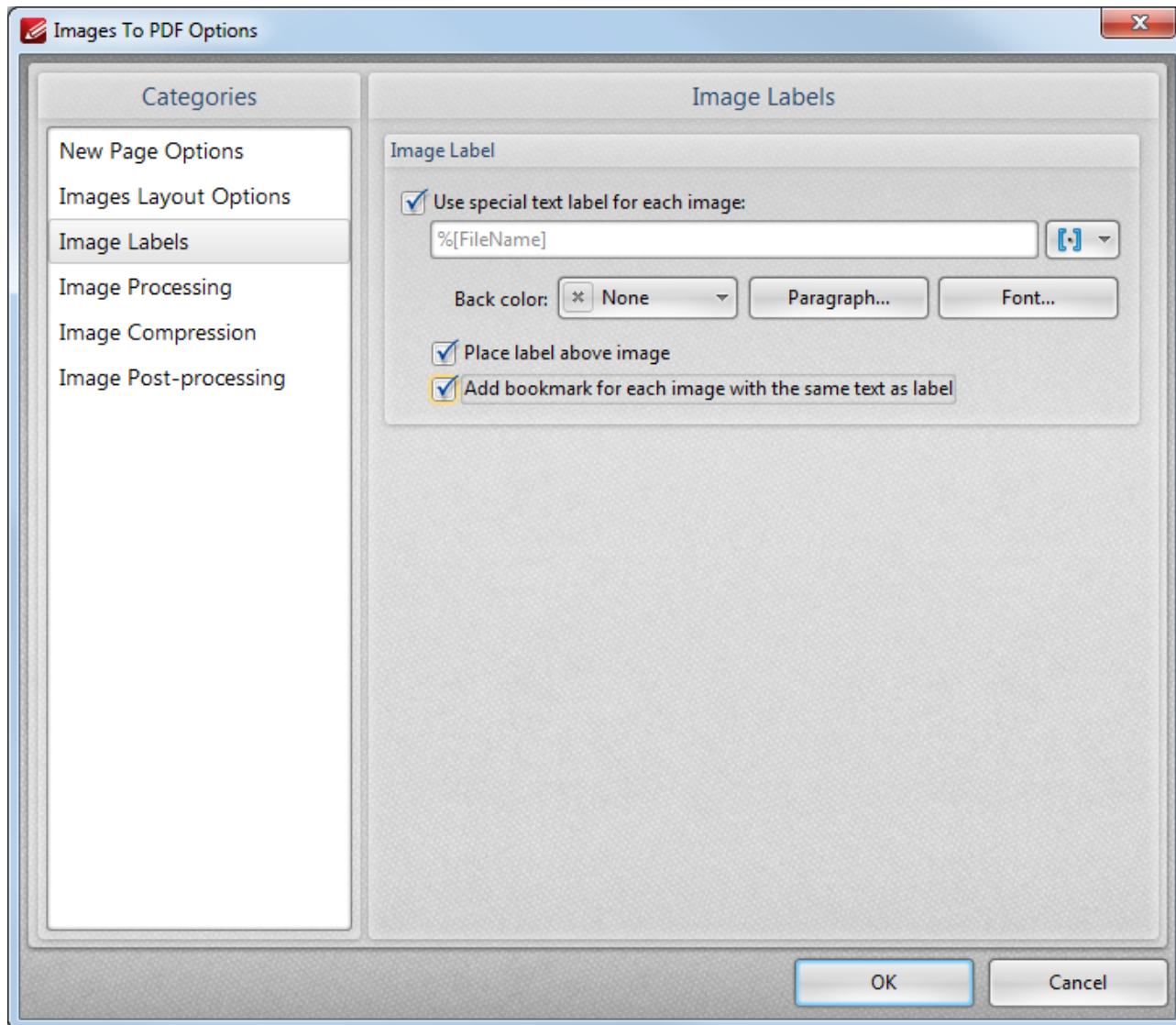
Figure 1. Images to PDF Options Dialog Box

- Select the **Use special text label for each image** box to enable the use of macros for this option.
- Use the **Back color, Paragraph** and **Font** buttons to set these parameters of the label.
- Select the remaining two boxes as desired.

For example:

- The macro "**%[DocNumber: <4>]**" is entered in the text box.
- When the new document is created, the labels "0001, 0002, 0003" etc will appear according to the parameters specified in the dialog box displayed in *(figure 1).*

7.6.4 **Page Number**

Page Number

The **Page Number** macro uses the name **Page** and determines the format of page numbering. It can be used in any operation that requires page numbering - for example when extracting pages or adding images.

The syntax for this macro is **%[Page:<Parameter>]**

Available parameters are detailed below:

- **r** sets the page numbering as lower-case roman numerals: "**i, ii, iii, iv, v**" etc.
- **R** sets the page numbering as upper-case roman numerals: "**I, II, III, IV, V**" etc.
- **L** sets the page numbering as the page labels, if the page labels are already specified, or page numbers if page labels are not already specified.
- **<integer>** sets the minimum amount of digits when the page number is displayed. For example if "4" is specified then the page numbering will start at "**0001**".

7.6.5   Number of Pages

Number of Pages

The **Number of Pages** macro uses the name **Pages** and automatically returns the number of pages:

- If **All** is selected in the **Pages Range** number box the the number of document pages is returned.
- If **Current Page** is selected in the **Pages Range** number box then the number **"1"** is returned.
- If a specific page range is determined then the number of pages specified is returned.

The syntax for this macro is **%[Pages:<Parameter>]**

Available parameters are detailed below:

- **r** sets the page numbering as lower-case roman numerals: "**i, ii, iii, iv, v**" etc.
- **R** sets the page numbering as upper-case roman numerals: "**I, II, III, IV, V**" etc.
- **L** sets the page numbering as the page labels, if the page labels are already specified, or page numbers if page labels are not already specified.
- **<integer>** sets the minimum amount of digits when the page number is displayed. For example if "4" is specified then the page numbering will start at "**0001**".

7.6.6   **File Name**

File Name

The **File Name** macro uses the name **FileName** and displays the file name independently of its extension, for example in the **Extract Pages** operation, or with its extension, for example in the **Add Watermarks** operation.

The syntax for this macro is **%[FileName>]**

For example, when using the **Add Watermark** 539 option, the following options are available:
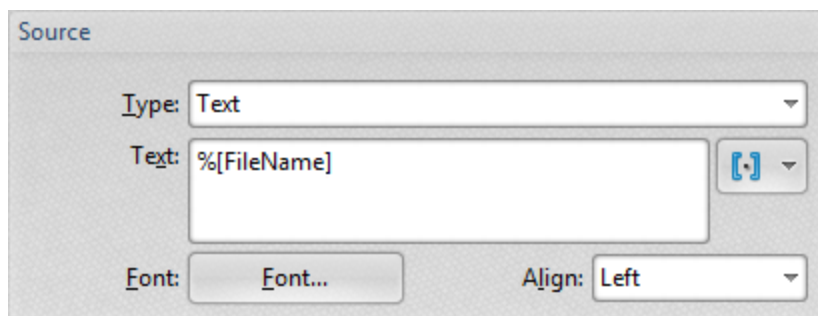

Figure 1. Add Watermark Dialog Box, Source Options

Entering the **%FileName** macro will result in the file name being used as the text for the watermark.

7.6.7 Folder Name

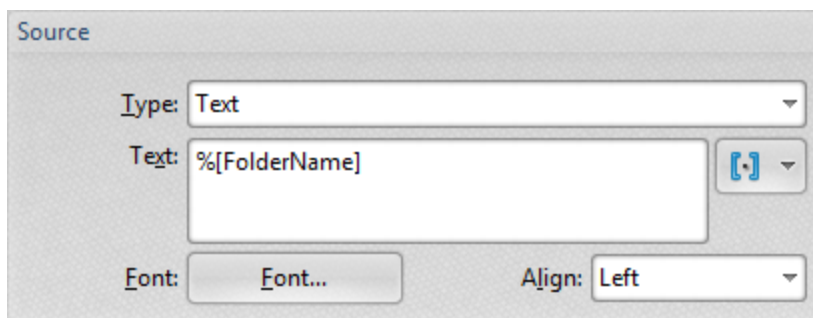 **Folder Name**

The **Folder Name** macro uses the name **FolderName** and returns the path of the folder that contains the associated PDF file. When a local file is being used the folder name ends with a backslash: "\".

The syntax for this macro is **%[FolderName>]**

For example, when using the **Add Watermark** 539 option, the following options are available:

Figure 1. Add Watermark Dialog Box, Source Options

Entering the %FolderName macro will result in the folder name being used as the text for the watermark.

7.6.8 **Date**

Date

The **Date** macro uses the name **Date** and returns the date at the time of creation.

The syntax for this macro is **%[Date:<Parameter>]**

The available parameters are detailed below and can be entered as a <date formatting string>. The date formatting string follows standard windows date coding. It can be customized and displayed as combinations of the parameters below:

- **d** displays the day of the month in digits and omits the zero in cases of single-digit values.
- **dd** displays the day of the month in digits and includes a zero in cases of single-digit values.
- **ddd** displays the day of the week in a three-letter abbreviation.
- **dddd** displays the day of the week in full.
- **M** displays the month as digits and omits the zero in cases of single-digit values.
- **MM** displays the month as digits and includes a zero in cases of single-digit values.
- **MMM** displays the month as a three-letter abbreviation.
- **MMMM** displays the month in full.
- **y** or **yy** displays the year as two digits and adds a zero in cases of values lower than 10.
- **yyyy** displays the year in full.

For example, the string **%[Date:ddd, MMMM dd, yyyy]** could create the date **Tue, February 23, 2016.**

If no parameters are specified then the value will revert to default, which is the parameters of the operating system of the local machine in the format **dd/MM/yyy.**

7.6.9 **Year**

Year

The **Year** macro uses the name **Year** and returns the current year as a four-digit value.

The syntax for this macro is **%[Year]**

7.6.10 Month

Month

The **Month** macro uses the name **Month** and returns the current month as a two-digit value.

The syntax for this macro is **%[Month]**

7.6.11 **Day**

Day

The **Day** macro uses the name **Day** and returns the current day as a two-digit value.

The syntax for this macro is **%[Day]**

7.6.12 **Time**

Time

The **Time** macro uses the name **Time** and returns the current time (day, month, year, AM/PM in any combination - see below).

The syntax for this macro is **%[Time]** for the standard Windows format or **%[Time]:<Parameter>]** for custom formats.

The <parameter> value is a standard Windows <time formatting string>. Available parameters are detailed below:

- **h** returns the hours and omits the zero in cases of single-digit values.
- **hh** returns the hours and includes a zero in cases of single-digit values.
- **H** or **HH** returns the hours, includes a zero in cases of single-digit values and uses a 24 hour-clock when applicable.
- **m** returns the minutes and omits the zero in cases of single-digit values.
- **mm** returns the minutes and includes a zero in cases of single-digit values.
- **s** returns the seconds and omits the zero in cases of single-digit values.
- **ss** returns the seconds and includes a zero in cases single-digit values.
- **t** returns a single character to reference the a.m./p.m. variable, such as A/P.
- **tt** returns two characters to reference the a.m/p.m. variable, such as AM/PM.

For example, when using the **Export to Images** feature, the following options displayed in the **Export to Images** dialog box:
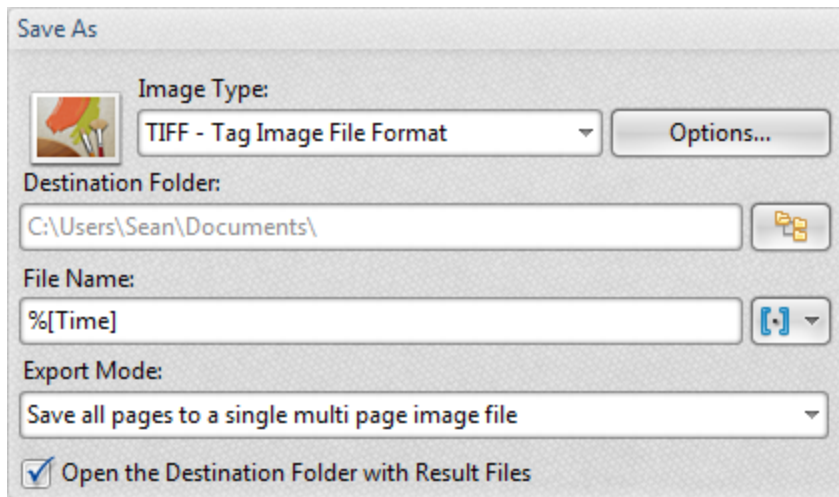
Figure 1. Export to Images Dialog Box. Save As Tab

If **%[Time]** is added to the file name text box, then the time of document creation will be added to the file name when it is created.

7.6.13 Hour

Hour

The **Hour** macro uses the name **Hour** and returns the current hour as as either a single or double-digit value.

The syntax for this macro is **%[Hour]**

7.6.14 **Minute**

Minute

The **Minute** macro uses the name **Minute** and returns the current minute as either a single or double-digit value.

The syntax for this macro is **%[Minute]**

7.6.15 **Seconds**

Seconds

The **Seconds** macro uses the name **Seconds** and returns the current seconds as as either a single or double-digit value.

The syntax for this macro is **%[Seconds]**

7.6.16 **Computer Name**

Computer Name

The **Computer Name** macro uses the name **Computer** and returns the name of the local computer set as the Windows Computer Name.

The syntax for this macro is **%[Computer]**

7.6.17   **User Name**

User Name

The **User Name** macro uses the name **User** and returns the name of the user account logged into windows at the time of use.

The syntax for this macro is **%[User]**

7.6.18   Environment Variable

Environment Variable

The **Environment Variable** macro uses the name **Env.** The syntax for this macro is **%[Env:<Parameter>].** It returns the value of the parameters entered from the available environment variables, which are detailed below:

- **ALLUSERSPROFILE**
- **APPDATA**
- **CommonProgramFiles**
- **CommonProgramFiles(x86)**
- **CommonProgramFilesW6432**
- **COMPUTERNAME**
- **HOMEDRIVE**
- **HOMEPATH**
- **LOCALAPPDATA**
- **LOGONSERVER**
- **OS**
- **PROCESSOR_ARCHITECTURE**
- **ProgramData**
- **ProgramFiles**
- **ProgramFiles(x86)**
- **ProgramFilesW6432**
- **PUBLIC**
- **SESSIONNAME**
- **SystemDrive**
- **SystemRoot**
- **TEMP**
- **TMP**
- **USERDOMAIN**
- **USERNAME**
- **USERPROFILE**
- **windir**

See **here** for an explanation of environment variables.

7.6.19 **Auto Number**

Auto Number

The **Auto Number** macro uses the name **AutoNumber** and returns an enumeration of output files.

The syntax for this macro is **%[AutoNumber:<Parameter>]**

The available parameters are detailed below:

- **r** returns the enumeration in lower-case roman numerals.
- **R** returns the enumeration in upper-case roman numerals.
- **L** returns the enumeration as page labels in cases where page labels are specified. If they are not specified then page numbers will be used.
- **<integer>** indicates the minimum number of digits used to display the formatted page number. For example if "4" is entered then numbering will start at 0001.

7.6.20   **Application Version**

Application Version

The **Application Version** macro uses the name **AppVersion** and returns the value of the user's version and build of the **PDF-XChange Editor** that is currently installed.

The syntax for this macro is **%[AppVersion]**

7.6.21   Image Number

Image Number

The **Image Number** macro uses the name **ImageNumber** and returns an enumeration of output images from a page.

The syntax for this macro is **%[ImageNumber:<Parameter>]**

The available parameters are detailed below:

- **r** returns the enumeration in lower-case roman numerals.
- **R** returns the enumeration in upper-case roman numerals.
- **L** returns the enumeration as page labels in cases where page labels are specified. If they are not specified then page numbers will be used.
- **<integer>** indicates the minimum number of digits used to display the formatted page number. For example if "4" is entered then numbering will start at 0001.

7.6.22   **Macro-Enabled Operations**

 Macro-Enabled Operations

Macros are available for the operations detailed in the table below:

OPERATION	LOCATION
Bates Numbering	**Document Tab> Bates Numbering> Add to Multiple Files**
Extract Pages	**Document Tab> Extract Pages**
Export to Images	**File Tab> Export to Images**
From Image File(s)	1. **File Tab> New Document> From Image File(s)** then click **Options.** The **Images to PDF** dialog box will open. Select **Image Labels** in the Categories menu. Macros can be used in the text box. 2. **Document Tab> Insert Pages > Insert Images** then click **Options.** The **Images to PDF** dialog box will open. Select **Image Labels** in the Categories menu. Macros can be used in the text box.
From Text Files	1. **File Tab> New Document> From Text Files** then click **Options.** The **Options** dialog box will open. Select **File Separator** in the Categories menu. Macros can be used in the text box.

	2. **Document Tab> Insert Pages> Insert Text** then click **Options.** The **Options** dialog box will open. Select **File Separator** in the Categories menu. Macros can be used in the text box.
Launch Application	**Edit> Preferences>** then select **Launch Applications** in the Categories Menu. Click **New.** The **New Launch Application** dialog box will open. Macros can be used in the **Parameters** text box. See **here** [289] for further information.
Stamps Palette	**Main Menu> Tools> Comment And Markup Tools> Stamps Palette** then click **New from File** and select a file to be used as a stamp. Macros can be used in the **Stamp Title** text box.
Summarize Comments	**Comments> Summarize Comments.** Macros can be used in the **File Name** text box.
Watermarks	**Document> Watermarks> Add>.** Macros can be entered in the **Text** text box.

Macro-Operation Compatibility

The table below details the compatibility of available macros in conjunction with operations that are macro-enabled:

MACRO	OPERATION							
	Bates Numbering	Extract Pages	Export to Images	From Image File(s)	From Text Files	Stamps Palette	Summarize Comments	Watermarks
	Yes	Yes	Yes	No	No	Yes	Yes	Yes

Document Title								
Document Index	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Document Info	Yes	Yes	Yes	No	No	Yes	Yes	Yes
Page Number	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Number of Pages	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
File Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Folder Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Date	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Year	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Month	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Day	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Time	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Hour	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Minute	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Seconds	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Computer Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
User Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Environment Variable	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Application Version	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Image Number	Yes	Yes	No	No	Yes	Yes	Yes	No
Auto Number	Yes	Yes	Yes	Yes	No	Yes	Yes	No

7.7 Page Range Settings

Page Range Settings

Page range settings are available in many of the **PDF-XChange Editor** dialog boxes. When determining page ranges it is important to note the following:

- Use commas to separate individual pages.
- Use hyphens to determine page ranges.
- Use commas to separate page ranges if multiple pages 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.

7.8   Read Out Loud Feature

Read Out Loud Feature

This feature of **PDF-XChange Editor** enables the software to "read out loud" document text. The operating instructions are outlined below:

1. Open the document that contains the text.

2. Click **Select Text Tool** 640 in the **Standard Toolbar.** 310

3. Select the text to be read out loud.

4. Right-click the text.

5. Select **Read Out Loud Selected Text.**

6. The selected text will be read out loud according to the specifications determined **here.** 295

7. Select **Stop Reading** to halt the process.

7.9 Shell Extensions

Shell Extensions

PDF-XChange Editor features a windows shell extension. This means that thumbnails of PDF files are displayed in Windows Explorer. When thumbnail mode is being used in Windows Explorer, thumbnails of the first page of PDF documents and displayed instead of standard PDF document icons. This happens when the active folder is set to view medium, large or extra-large icons.

iFilter

The shell extension includes a very powerful search tool - the **PDF iFilter**. This tool can be used to index PDF documents with Microsoft iFilter indexing. This means that windows will locate search terms through not only document names, but also text within documents, annotations, bookmarks, document XMP information and files attached/embedded within documents. This process takes place automatically when using the standard Windows search option. 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.

7.10   Text Editing Options

Text Editing Options

When tools that contain text options are being used, text editing options are enabled in the **Properties Toolbar.** 484 Available properties depend on the active tool. Detailed below are all available properties:
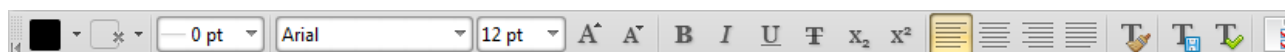
Figure 1. Text Editing Options

- **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** (or Ctrl+I) italicizes text.
- **Underline** underlines text.
- **Strikethrough** strikes through text.
- **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 on the left side of the text box.
- **Center Text** centers text in the center of the text box.
- **Align Text Right** aligns text on the left side of the text box.
- **Justify Text** (or Ctrl+J) justifies text within text boxes.
- **Clear Style** reverts selected text that has been edited to the default style for the current tool.
- **Set as 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** pane, which displays a summary of the properties of selected text and can also be used to edit text properties.

7.11 Tool Content Options

Tool Content Options

Editing options are available when content has been created using the **PDF-XChange Editor** tools. Right-click content to view the tool content edit menu. Available options depend on the content format. The submenu below contains all available options:
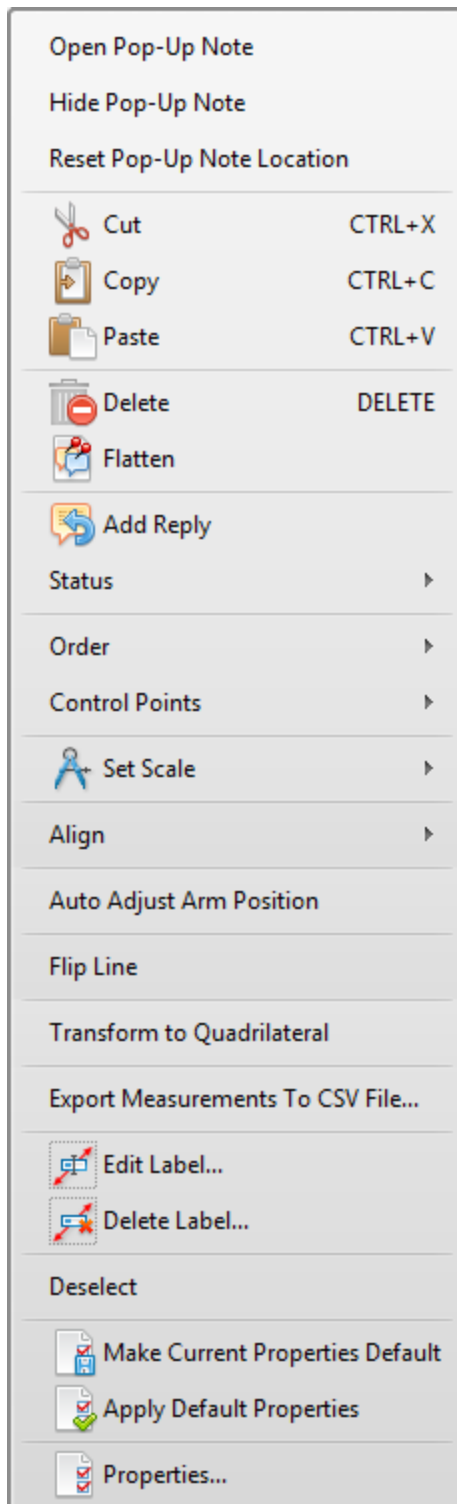
Figure 1. Tool Content Edit Menu

- Click **Open Pop-Up Note** to view the pop-up note for the content. (Pop-up notes are created automatically when content is created. Please note that when the **Distance Tools** are being used 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**|863| in order to customize its appearance.

- Click **Hide Pop-Up Note** to close the view/edit pane of pop-up notes associated with content.
- Click **Reset Pop-Up Note Location** to reset the location of pop-up notes associated with content.
- Click **Cut, Copy, Paste** or **Delete** to perform these operations on selected content. Copied items will be added to the clipboard of the local computer.
- Click **Flatten** to disable subsequent content editing. Please note that associated pop-up notes are deleted during this process. The **Undo** feature in the **Shortcut Toolbar**|301| can be used to reverse the flattening process.
- Click **Add Reply** to add replies to existing pop-up notes.
- Use the **Status** submenu to define the status of content for subsequent editing. The options are **Accepted, Cancelled, Completed** and **Rejected.**
- Use the **Order** submenu to determine how content appears in relation to overlapping content:
  - Select **Bring to Front** to bring content to the front in cases of multiple objects overlapping.
  - Select **Send to Back** to send content to the back in cases of multiple objects overlapping.
  - Select **Bring Forward** to bring content to the front in cases of two objects overlapping.
  - Select **Send Backward** to send content to the back in cases of two objects overlapping.
- Use the **Control Points** submenu to add/delete control points as desired:
  - Right-click control points and select **Delete Point** to delete points.
  - Move the pointer to the desired location in content borders, then right-click and select **Add Point** to add new control points.
- Use the **Set Scale** submenu to select a scale for content:
  - Click a scale to select a predefined scale from the list.
  - Click **Manage Measurements** to view/edit the list of predefined scales. Use the **Delete** and **Edit** buttons to delete/edit selected scales. Use the **Clone** button to clone predefined scales. Cloned scales can be edited as desired and saved for subsequent use.
  - Click **Calibrate Measurement** to create a new scale. This operation is explained **here.**|734|
- Click **Align** to align selected content. Use the **Align** submenu to select a layout. Content will align to the item that was first placed in the document by default if the items were group-selected using the mouse. If items were group-selected by holding Ctrl and selecting them one at a time, then the first item selected will be used as the reference point.
- The **Auto Adjust Arm Position** option relates to the callout arm of the **Callout Tool.** When this setting is disabled the control point from which the callout arm originates remains constant when callout text boxes 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 is used.
- Click **Flip Line** to flip content through one hundred and eighty degrees.
- 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.

- Click **Export Measurements To CSV File** as desired. When this option is selected, the **Save File** dialog box will open. Select a location for the file and click **Save** to save the current measurements as a .csv file.
- Click **Edit Label** to edit the content pop-up note. The **Measure Label** dialog box will open. Enter the desired text in the text box and click **OK** to update the label. The new text will be displayed above content and in the associated pop-up note. Please note that it is not possible to remove the scale reference figure that the **Distance Tools** 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 **Make Current Properties Default** to set the properties of the selected content as the default properties for subsequent content of the same format.
- Click **Apply Default Properties** to apply the default content properties to selected content.
- Click **Properties** to view/edit content properties. The **Properties** pane will open. These options are explained **here.** 224

7.12 Tool Properties

Tool Properties

The table below contains a list of properties available for tools in **PDF-XChange Editor.** Click **Properties** in the **Properties Toolbar** ⌷484 when tools are selected to view/edit tool properties in the **Properties** 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 standard 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 when tools are used to create shapes.
Blend Mode	The **Blend Mode** property determines the manner in which tool-created content blends with underlying/overlapping content. See **here** 794 for further information.
Fill Color	The **Fill Color** property determines the fill color when tools are used to create shapes.
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 icons that tools use.
Opacity	The **Opacity** property determines the level of transparency in tool-created content.
Stroke Color	The **Stroke Color** property determines the border color when tools are used to create shapes.
Underline	The **Underline** property determines the underline style when using the **Underline Text Tool.**
Width	The **Width** property determines the width of tool-created content.
DEFAULT TEXT FORMAT	
Font	The **Font** property determines the font used in tool-created content.

Font Size	The **Font Size** property determines the font size used in tool-created content.
Text Alignment	The **Text Alignment** property determines the text alignment of tool-created content.
Text Color	The **Text Color** property determines the text color of tool-created content.
OTHER	
End	The **End** property determines the style of line endings.
End Scale	The **End Scale** property determines the scale used at line endings.
Inline Caption	The **Inline Caption** property is not currently available. It will be available in future builds.
Leader Extension	The **Leader Extension** property determines the length of optional lines that extend from leader lines when using the **Line/Arrow 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.
Scale	The **Scale** property determines the scale used in tool-created content.
Show Caption	The **Show Caption** property determines caption visibility in the **Line/Arrow Tool.** When it is enabled the content of pop-ups

	associated with line/arrow markups is displayed in text form 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 subject title of tool-created content. Please note that it is not possible to edit this property in all tools.
Subject Kind	The **Subject Kind** property determines the subject value of tool-created content. There are three options: • **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.

8   PDF-XChange Lite User Manual

PDF-XChange Lite User Manual

PDF-XChange Lite V6 is the lite version of our best-selling software for the creation and virtual printing of industry-standard PDF files - **PDF-XChange Standard V6.** 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-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 printed 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:
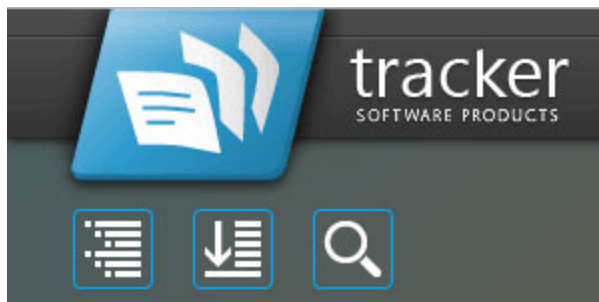
 Click the **Table of Contents** to view/move to chapters of the manual.

 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.

9 Features Overview

Features Overview

PDF-XChange Lite is a reduced version of **PDF-XChange 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 Lite** are detailed below:

- **Document Information** options that support both basic and advanced settings, including the option to add XMP Metadata.
- **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. **Macros** [894] have been introduced to increase workflow efficiency.
- **Language** options that support a wide range of languages.
- **Paper Properties** that offer dynamic options for paper size, resolution, scaling and output.

10   PDF-XChange Lite Printer Settings

PDF-XChange Lite Printer Settings

PDF-XChange Lite features many customizable settings. These are accessible from the printers list. Follow the steps below to adjust settings:

> 1. Click the **Windows Start Button**.
>
> 2. Click **Control Panel.**
>
> 3. In the **Control Panel** dialog box, click **Devices and Printers.**
>
> 4. In the **Printers** tab, point to the printer **PDF-XChange Lite** and right-click.
>
> 5. Select **Printing Preferences** from the menu options. The **PDF-XChange Lite V6 Printing Preferences** dialog box will open:
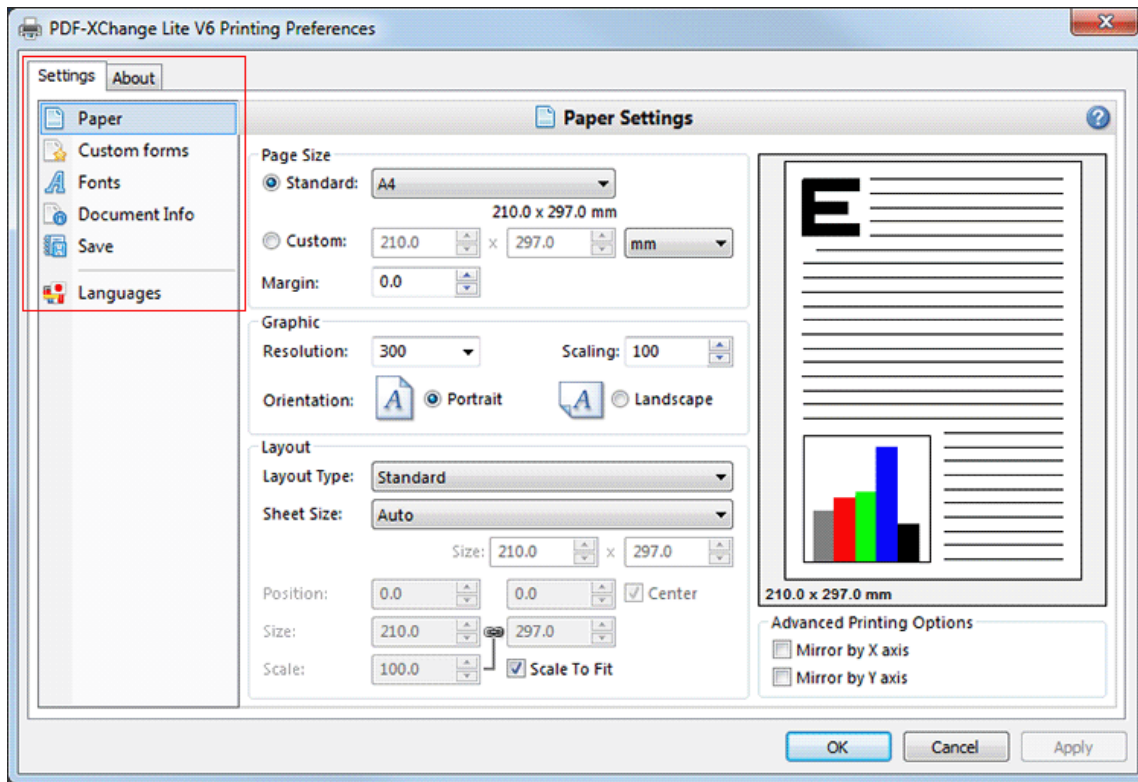
Figure 1. PDF-XChange Lite V6 Printing Preferences Dialog Box, Settings Tab Highlighted

6. Use the **Settings** tab highlighted in *(figure 1)* to select settings. All sections are detailed below:

- **Paper** 878
- **Custom Forms** 886
- **Fonts** 888
- **Document Info** 890
- **Save** 892
- **Languages** 897

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.

10.1 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 dialog box. This is because they use values determined within their own parameters and give those values priority over the options in **PDF-XChange Lite.**

Click **Paper** in the menu on the left of the main window to customize the **Paper Settings:**
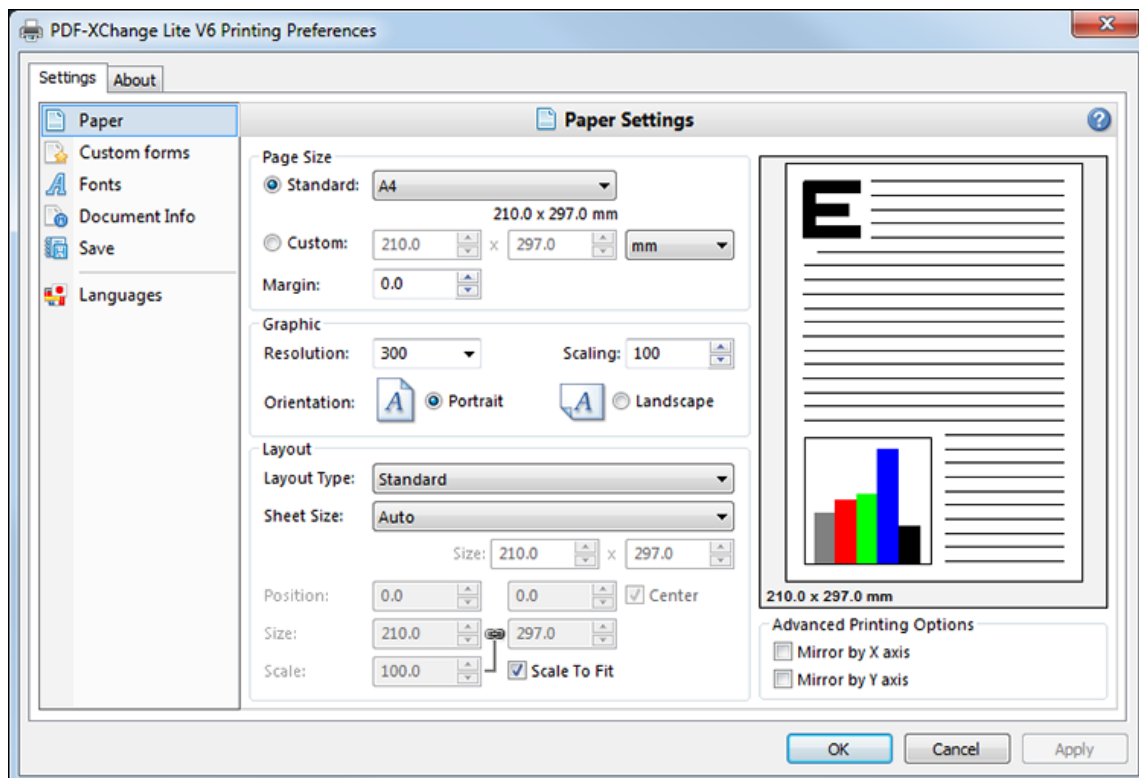
Figure 1. Paper Settings Dialog Box

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 PDF-XChange. If problems arise, especially in regard to portions of output exceeding the defined margin/page limits, we recommend setting a margin of at least 3.2mm.

Graphic

- **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** determines either **Portrait** or **Landscape** as the page orientation.

Page Layout

- **Standard** layout features one page per PDF page. See **here** 880 for further options.
- **Booklet** layout features adjacent pages and is used for booklets and similar documents. See **here** 882 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** 884 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 **Apply** to apply changes and **OK** to save changes.

10.1.1   Standard Layout

Standard Layout

The **Standard** layout is used to print one document page per PDF page. When it is selected in the **Layout Type** menu the following options are available:
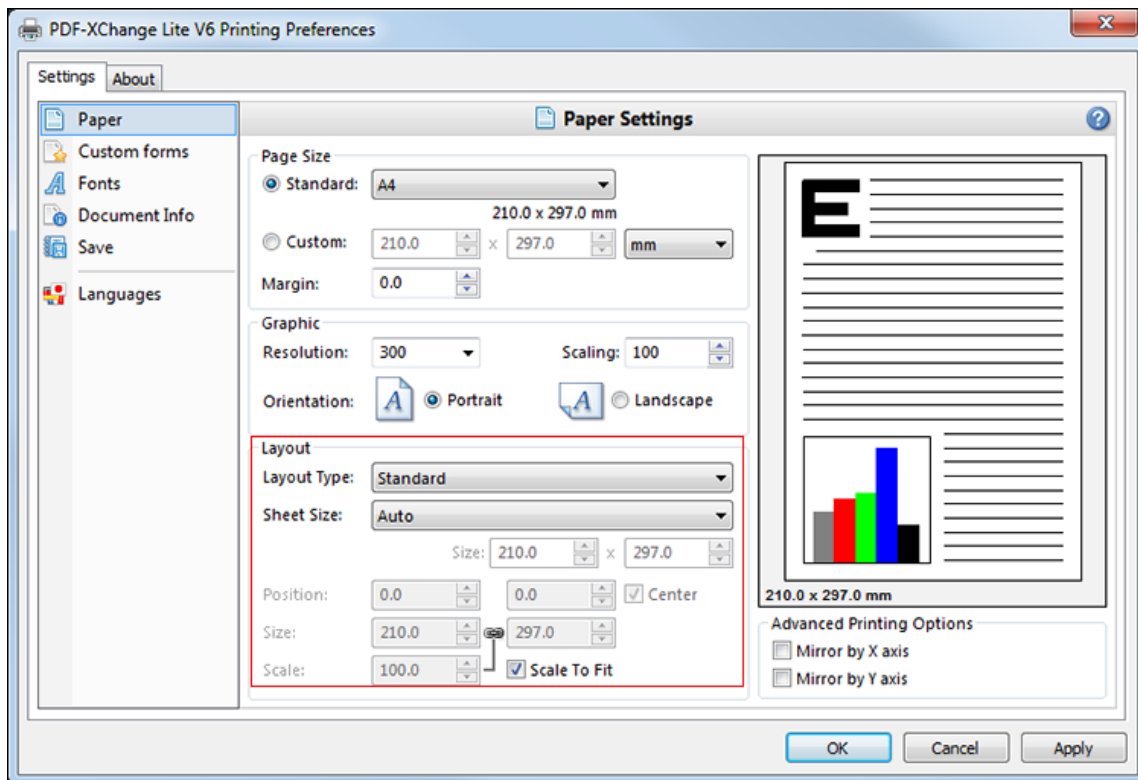
Figure 1. Paper Settings Dialog Box, Standard Options

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

10.1.2   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:
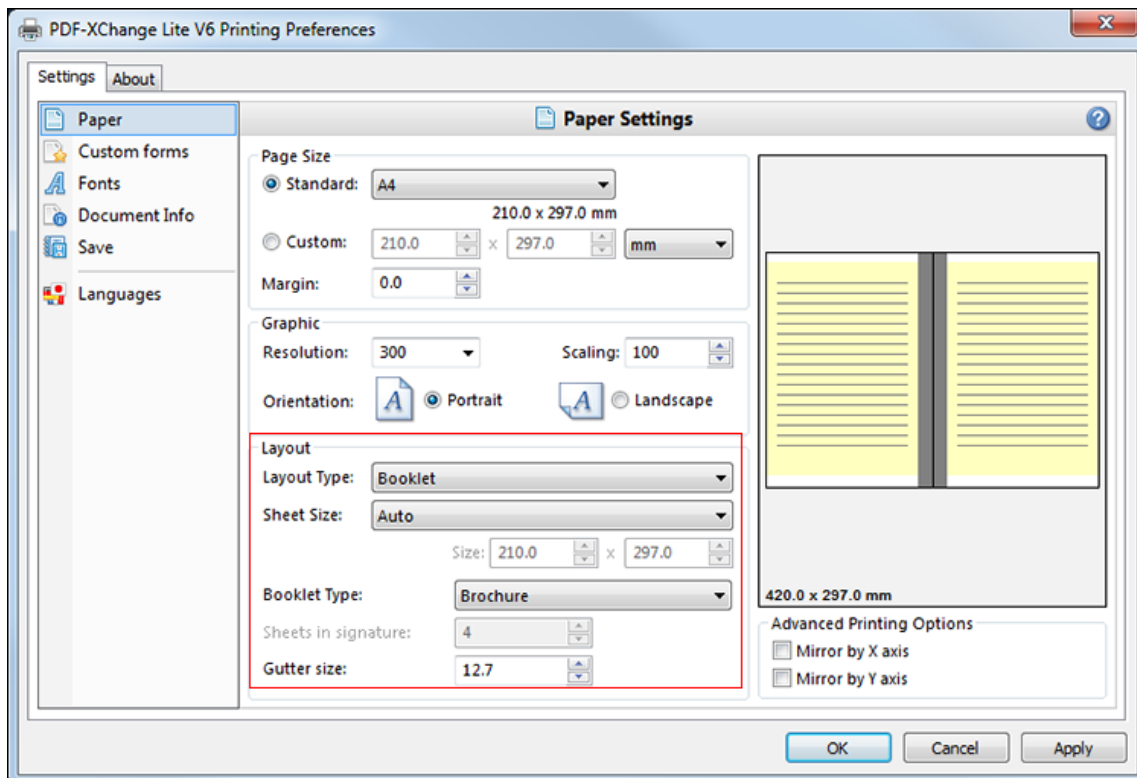
Figure 1. Paper Settings Dialog Box, Booklet Options

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

10.1.3 **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:
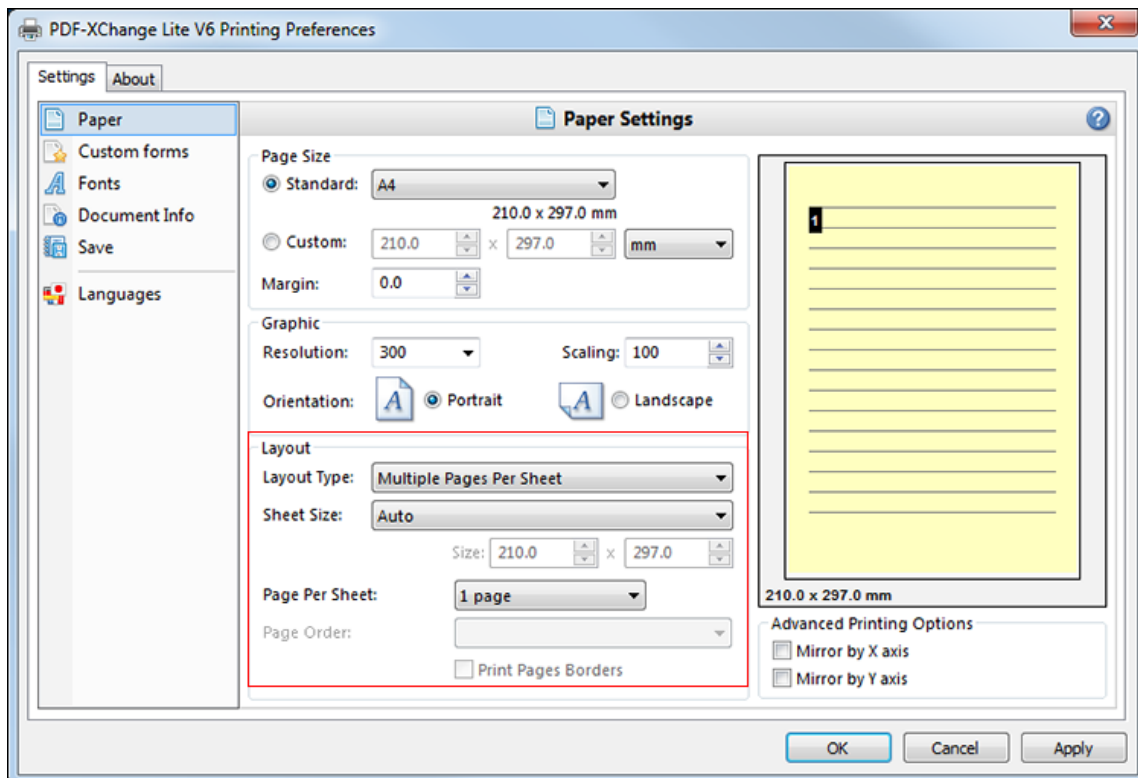
Figure 1. Paper Settings Dialog Box, Multiple Pages Per Sheet Options

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.

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

10.2 Custom Forms

Custom Forms

The **Custom Forms** settings are used to save custom forms for subsequent use:
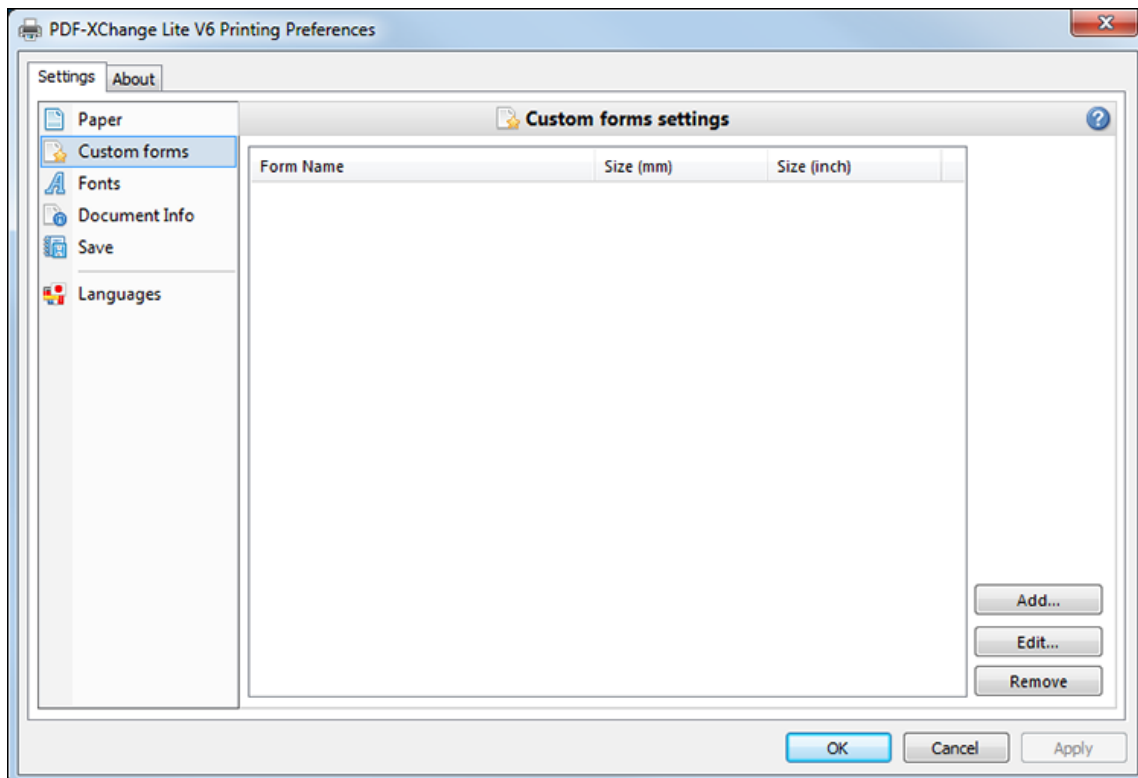
Figure 1. Custom Forms Settings Dialog Box

- Click **Add** to add a new custom form. The **Add/Edit Custom Form** dialog box will open. See *(figure 2).*
- Click **Edit** to edit selected forms.
- Click **Remove** to remove selected forms.
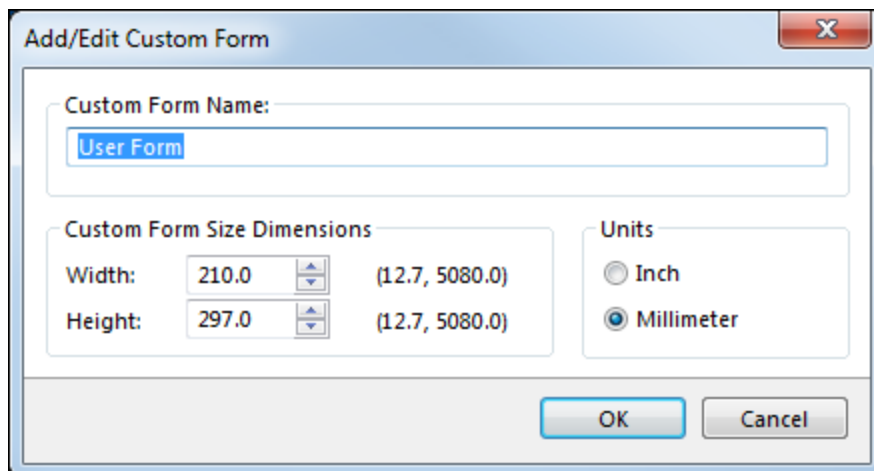
Figure 2. Add/Edit Custom Form Dialog Box

- 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 settings.

10.3 Fonts

Fonts

The **Fonts** settings are used to determine font embedding options.
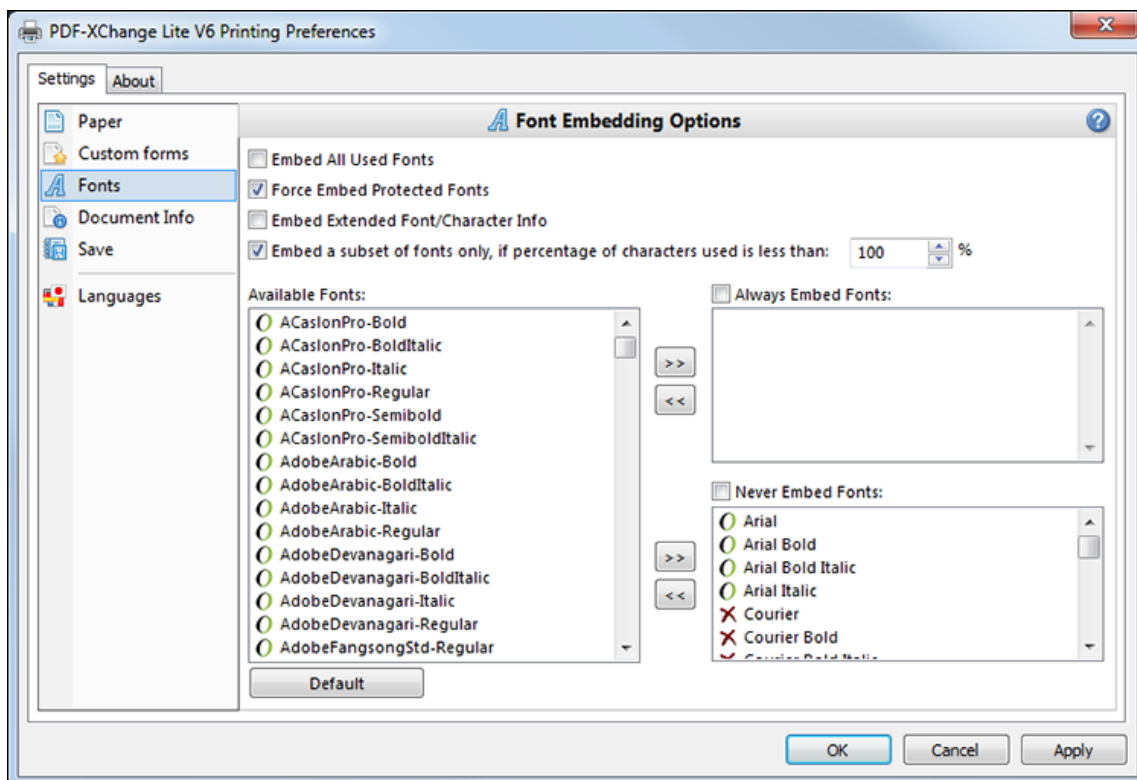
Figure 1. Font Embedding Options Dialog Box

- Select the **Embed All Used Fonts** box to embed all fonts. This increases the file size but ensures documents 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 **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** windows. 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 subsequent users will have common fonts available on their computers, and therefore embedding these fonts will increase the size of files unnecessarily.
- Click **OK** to save settings.

10.4   Document Info

Document Info

The **Document Info** settings are used to determine PDF information in documents:
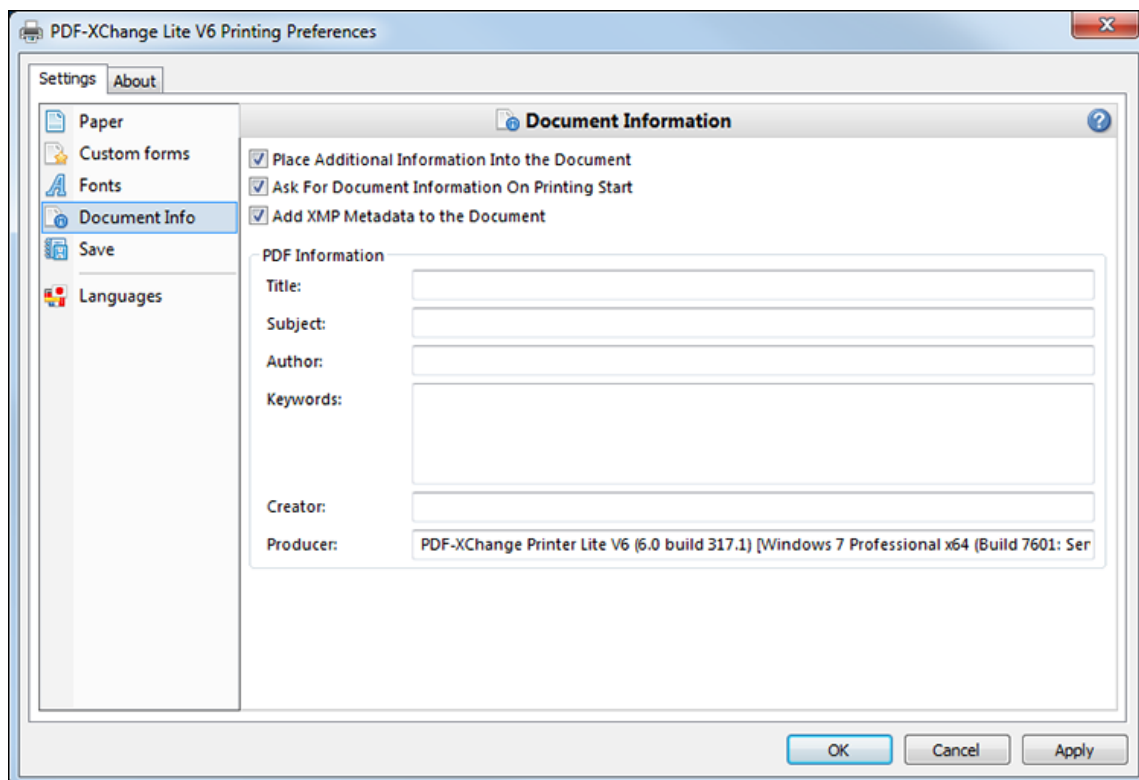
Figure 1. Document Information Dialog Box

- Select the **Place Additional Information Into the Document** box to enable further options.
- Select the **Ask For Document Information on Printing Start** box to enter document information 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** boxes as desired.
- Click **OK** to save settings.

10.5   Save

Save

The **Save** settings are used to determine the method through which **PDF-XChange Lite** names and saves files:
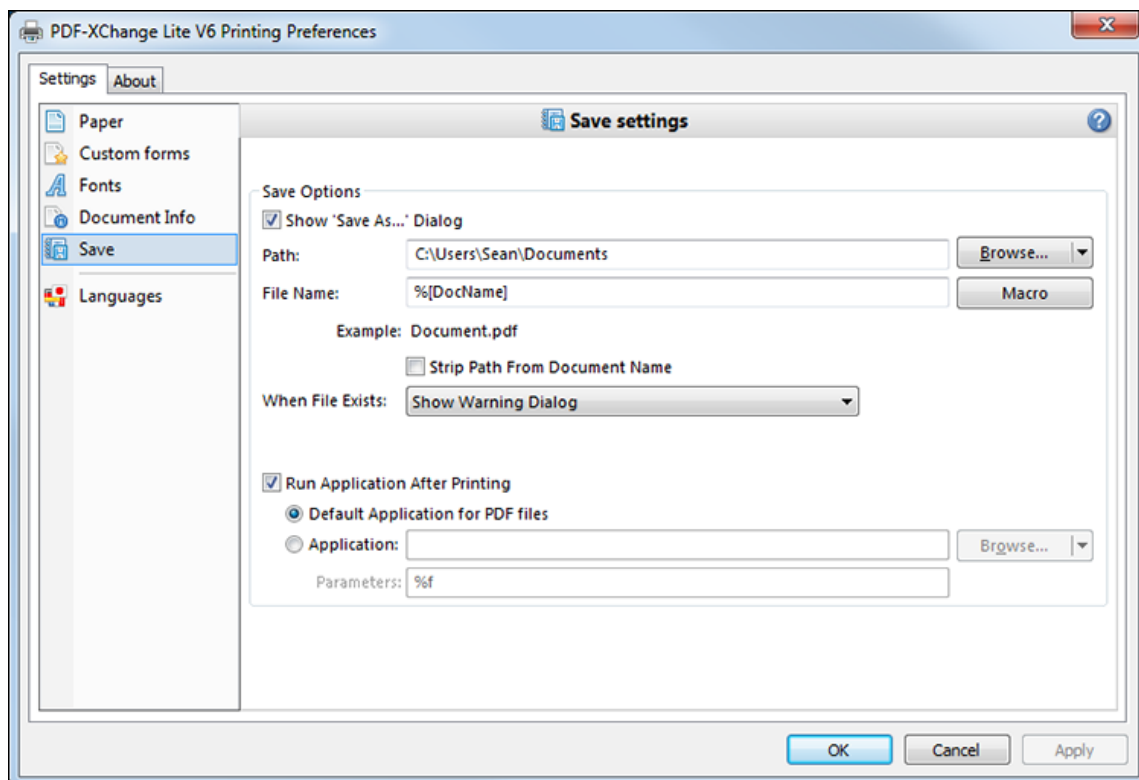
Figure 1. Save Settings Dialog Box

- Select the **Show Save As** box to view the **Save As** dialog box when files are saved.
- Use the **Path** text box to determine the location of saved files. Click **Browse** to select a folder.
- Use the **File Name** text box to name files. Add **macros** [894] as desired.
- 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 PDFs:
- Select the **Default Application for PDF files** option to view printed documents in the default PDF viewer.
- Select the **Application** option to enter an application with which to view printed PDFs. Alternatively, click **Browse** to select an application.
- Enter printing parameters in the **Parameters** text box as desired.
- Click **OK** to save settings.

10.5.1 **Document Macros**

Document Macros

Macros are used in several settings of **PDF-XChange Lite.** 'Macro' is an abbreviation of 'macroinstruction' - a specification that determines how input sequences of characters are mapped in the output process. This means complicated components of the output process can be reduced in the input process, which makes the work involved both less intensive and less error-prone.

The **PDF-XChange Lite** macros are used when files are saved. Macros must be added in square brackets after file names. All macros are detailed below. Unless otherwise specified, macros add the same details as the macro name to the file name:

- **Application Name**
- **Document Name** - see **here** 895 for further options.
- **Document Path**
- **Date** - see **here** 895 for further options.
- **Year**
- **Month**
- **Day**
- **Time**
- **Hour**
- **Minute**
- **Seconds**
- **Pages Count**
- **Computer Name**
- **User Name**
- **Environment Variable**

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

10.5.2   **%[Docname], %[Date] and %[Time]**

 %[Docname], %[Date] and %[Time]

%[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 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 assistance is required then please **Contact Us.**

%[Date]

The **%[Date]** macro can be expanded to include a date formatting string: **%[Date:<date formatting string>].** This can be used to customize the manner in which dates are formatted. Available options are detailed below:

- **dd** - the day of the month displayed in digits. Single-digit dates feature a zero followed by the date.
- **ddd** - the day of the week displayed as a three-letter abbreviation.
- **dddd** - the day of the week displayed in full.

- **M** - the month displayed in digits.
- **MM** - the month displayed in digits. Single-digit months feature a zero followed by the month number.
- **MMM** - the month displayed as a three-letter abbreviation.
- **MMMM** - the month displayed in full.

- **yy** - the year displayed as the last two digits of the year. Single-digit years feature a zero followed by the year number.
- **yyyy** - the year displayed in full.

For example, the macro **%[Date:<ddd, MMM, dd, yy>]** creates the date formatting string: **"Wed, Aug 31, 94".**

%[Time]

The **%[Time]** macro can be expanded to include a time formatting string: **%[Time:<time formatting string>].** This can be used to customize the manner in which times are formatted. Available options are detailed below:

- **h** - hours displayed in digits with a 12-hour clock.
- **hh** - hours displayed in digits with a 12-hour clock. Single-digit hours feature a zero followed by the hour.
- **H** - hours displayed in digits with a 24-hour clock.
- **HH** - hours displayed in digits with a 24-hour clock. Single-digit hours feature a zero followed by the hour.

- **m** - minutes displayed in digits.
- **mm** - minutes displayed in digits. Single-digit minutes feature a zero followed by the minute.

- **s** - seconds displayed in digits.
- **ss** - seconds displayed in digits. Single-digit seconds feature a zero followed by the second.

- **t** - displays a single time marker string, such as **A** or **P** (to represent **a.m.** and **p.m.**).
- **tt** - displays a double time marker string, such as **a.m.** or **p.m.**

For example, the macro **%[Time:<"hh,mm, ss, tt">]** creates the time formatting string: **"11_29_40 PM".**

10.6 Languages

Languages

The **Languages** settings are used to determine the language of the user interface:
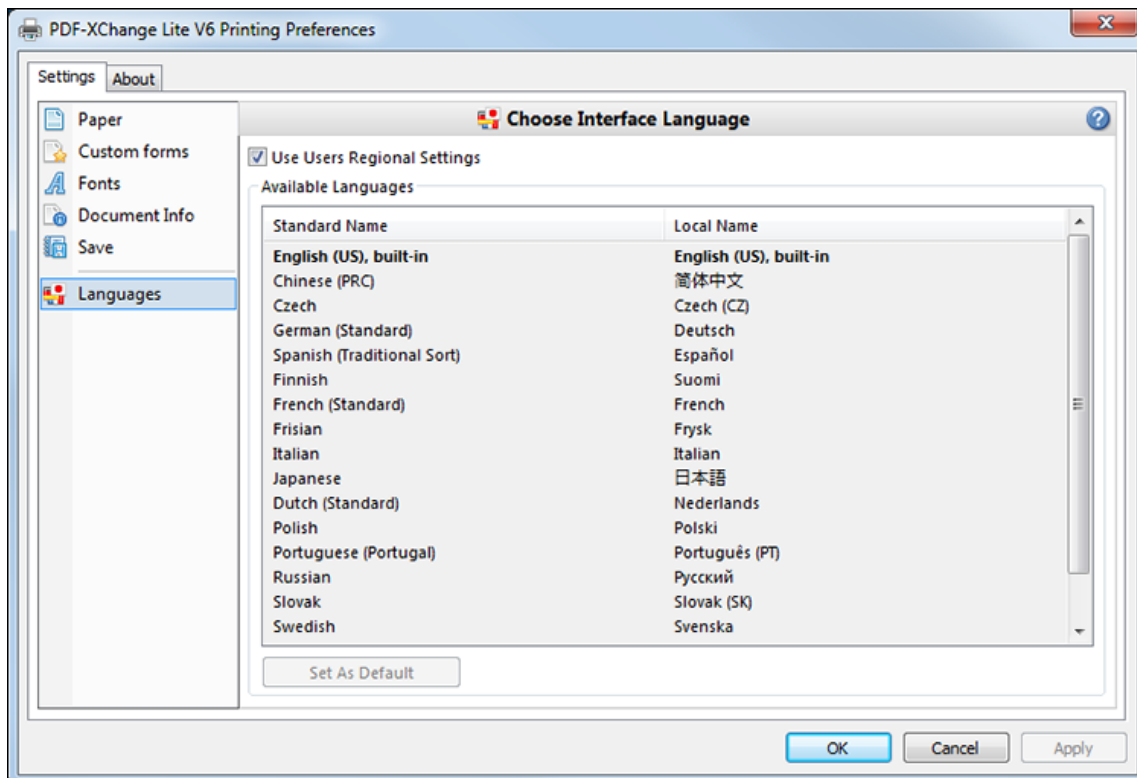
Figure 1. Choose Interface Language Dialog Box

- Select the **Use Users Regional Settings** box to use the regional language of the local computer. Clear this box to select a language in the **Available Languages** window.
- Select a language and click **Set as Default** to enable it.
- Click **OK** to save settings.

10.7   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.

- Click the windows start icon in the taskbar to access the **PDF Saver** settings.
- Enter **"pdfsaver"** in the search bar. Under the **Programs** search results, click **PDF-XChange Lite V6 pdfSaver.** The following dialog box will open:
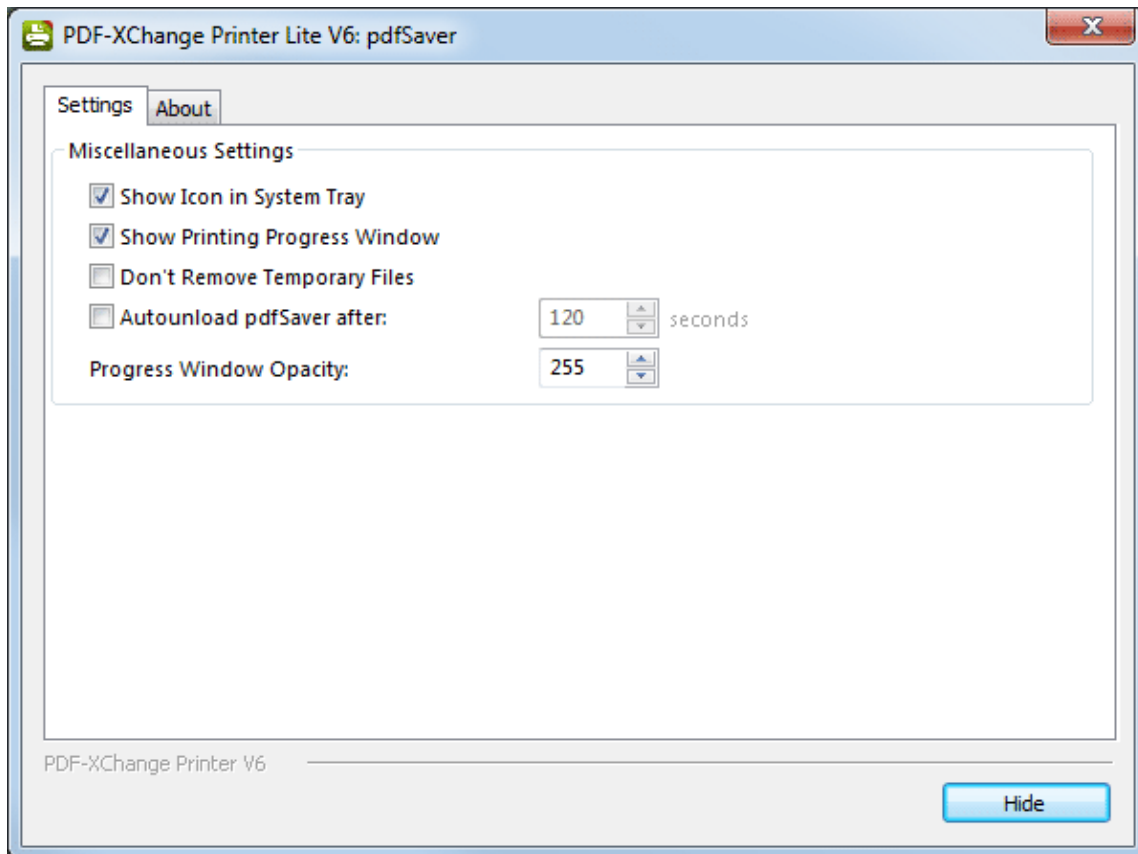
Figure 1. PDF Saver Dialog Box

- 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 **Don't Remove Temporary Files** box to retain temporary files after documents are printed.
- Select the **Autounload pdfSaver after** box to close the program after the number of seconds specified in the number box.
- Enter a value in the **Progress Window Opacity** number box to determine the transparency of the progress window.
- Click **Hide** to minimize the window.

- X -

- Z -