PDF-XChange

PDF-XChange SysAdmin Manual

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1 Introduction

 Introduction

This guide is designed for system administrators and other IT professionals who manage **PDF-XChange** products. It aims to provide administrators with the tools and resources necessary to manage **PDF-XChange** products across an enterprise. The concepts covered in this guide assume a certain proficiency with enterprise technologies, competence in working with the **Windows** registry, and often require administrator's privileges to perform.

This guide is designed to be used in conjunction with the comprehensive **online documentation** for **PDF-XChange** products. It includes additional information on the use of **PDF-XChange's** administrative templates, command line tools for **PDF-XChange** products, and step-by-step examples of some of the more common administrative tasks.

The **PDF-XChange** products contain a wide range of functionality. The products that you choose to install and the licenses that you purchase for those products should reflect the functionality that you require. The software components of the **PDF-XChange** applications are detailed below. The table beneath the list displays which of the software components is included with each product. A list of the main features for each product is available on the product pages of our website **here.** Please note that some features should be managed **during installation,** 58 while others are better managed **post installation.** 68

Software Components

- **PDF-XChange Editor** is the flagship product of **PDF-XChange. PDF-XChange Editor** is used to create and edit PDF files and contains a huge range of features and functionality, as detailed **here.** Note that there are two versions of **PDF-XChange Editor:**
    - **PDF-XChange Editor Plus** includes the full range of functionality available for the product, including the ability to create and edit fillable forms.
    - **PDF-XChange Editor** includes the full range of functionality available for the product, except the ability to create and edit fillable forms.
- **PDF-XChange Tools** is used to create and edit PDF files, with a focus on batch-processing capability. It is also used to create custom tools that can perform a wide range of operations, as detailed **here.**

- **PDF-XChange Printer Standard Printer** is a dynamic and feature-rich virtual printer that is used to print-to-PDF from **Windows** applications such as the **Microsoft Office** suite. The features and functionality for this product are detailed **here.**
- **PDF-XChange Printer Lite** is the lite version of **PDF-XChange Printer Standard.** It contains only the core functionality of **PDF-XChange Printer Standard** and is used to perform a simplified version of print-to-PDF. The features and functionality for this product are detailed **here.**
- **Shell Extensions** is a helper application that adds some of the features and capabilities of our products into the **Windows** file explorer. The **Shell Extensions** provide:
    - Previews of PDF files as thumbnails and/or previews in the **Windows** file explorer 'preview' pane.
    - The functionality to open/combine selected files with **PDF-XChange Editor.**
    - Enhanced file searching via the **iFilter** search function, which extends the default **Windows** search capabilities to include the content and metadata of PDF files.
- **Addin for MS Office** is a group of add-ins for the **Microsoft Office** suite that add a **'PDF-XChange'** tab to those products. The **PDF-XChange** tabs contain features and functionality of **PDF-XChange** applications and can be used directly from the user interface of **Microsoft Office** products.
- **Office2PDF** is a stand-alone application that performs unattended conversions of **Microsoft Office** files to PDF.
- **PDF-XChange Key Installer (XCVault)** is a stand-alone application that installs and manages the license keys of the products.
- **PDF-XChange Updater** is a stand-alone application that manages updates for the **PDF-XChange** applications.

Please note that the names of the products in this list are the names of the components as they appear in the installers. There is a difference between how some of these products are named in the installers and how they are named in our documentation and forums:

- **PDF-XChange Tools** is referred to as **PDF-Tools.**
- **PDF-XChange Printer Standard Printer** is referred to as **PDF-XChange Printer Standard.**
- **PDF-XChange Key Installer (XCVault.exe)** is referred to as **the XCVault utility,** or simply **XCVault.**

Product and Component Matrix

The table below details the **Software Components** included with each product:

	PDF-XChange Editor	PDF-XChange	PDF-XChange Print	PDF-XChange Print	Shell Extensions	Addin for MS	Office2PDF	PDF-XChange Key	PDF-XChange

		Tools	er Standard	er Lite		Office		Installer (XC Vault)	Updater
PDF-XChange PRO		✔	✔	✔	✗	✔	✔	✔	✔	✔
PDF-XChange Editor		✔	✗	✗	✔	✔	✗	✗	✔	✔
PDF-Tools		✔	✔	✗	✔	✔	✗	✗	✔	✔
PDF-XChange Printer Standard		✗	✗	✔	✗	✗	✔	✔	✔	✔

Note that **PDF-XChange PRO** is a bundle product that contains **PDF-XChange Editor Plus, PDF-Tools** and **PDF-XChange Printer Standard.**

This manual is composed of six sections that contain information on the **Deployment Planning, Installation, Updating** and **Customization** of:

- **PDF-XChange Editor** 81
- **PDF-XChange Printer Standard** 206
- **PDF-XChange Printer Lite** 254
- **PDF-Tools** 258
- **PDF-XChange PRO** 321
- **The PDF-XChange Updater** 350 (applies to all products)

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

2   PDF-XChange Deployment Planning

PDF-XChange Deployment Planning

There are several things that are important to note before purchasing and deploying the **PDF-XChange** products:

- **PDF-XChange Editor** can be installed via three different products - **PDF-XChange PRO, PDF-XChange Editor** and **PDF-Tools.**
- There is no difference between **PDF-XChange Editor** and **PDF-XChange Editor Plus** from the point of view of installation, as they use the same installers. The difference in their functionality is dictated by the license key applied to them after they have been installed.
- Installers are available in both .exe and .msi format, but the .msi installer should always be given preference for the reasons detailed **here.** 12
- **PDF-XChange Editor** contains many free features that do not require a license key - an unlicensed installation of **PDF-XChange Editor** may be sufficient to meet your needs.
- **PDF-XChange Printer Standard** and **PDF-XChange PRO** license keys do not license **PDF-XChange Printer Lite.**
- The **PDF-XChange Editor** and **PDF-XChange PRO** products both include virtual PDF printers - **PDF-XChange Printer Lite** and **PDF-XChange Printer Standard** respectively. However, these products are not the same and their licenses are not interchangeable. **PDF-XChange Printer Lite** is a simplified version of **PDF-XChange Printer Standard** and does not contains as many features or as much functionality. If printing to PDF is a priority, then **PDF-XChange Printer Standard** should be purchased. It is important to take note of this difference in licensing because a **PDF-XChange Editor** key will only unlock the **PDF-XChange Printer Lite** printer and will not unlock the **PDF-XChange Printer Standard** printer. Similarly, a **PDF-XChange PRO** or **PDF-XChange Printer Standard** key will not unlock the **PDF-XChange Printer Lite** printer. If the wrong printer is deployed for the license key purchased then watermarks will appear on its output PDF documents and it is then necessary to remove the problematic printer and install the correct one, or to buy a license for the printer installed in order to resolve the issue.

It's important to take note of several factors when planning your deployment, for example:

Do you plan to have a mix of licensed and unlicensed instances?

PDF-XChange supports licensed, unlicensed, and blended deployments. Many users can achieve

everything they need to do with the unlicensed version of **PDF-XChange Editor,** as more than half of the features are available in that version. This gives system administrators the option of licensing only those users whose needs are more advanced - even on multi-user systems. We support blended licensing by storing per-user keys in their HKCU registry hive.

Are you going to deploy to multi-user machines (RDS, workstations etc)?

Multi-user systems, especially those that employ load-balancing across servers, can pose unique deployment and licensing challenges. **PDF-XChange** supports RDS servers (formerly Terminal Services) and multi-user workstations.

Are you going to employ virtualization (VDI, Application Virtualization etc)?

Load-balancing and application virtualization across your VDI environment can present unique challenges to deployment and licensing. Further information on these issues is available **here.** 49

Do you intend to apply your license key during or after installation?

How you deploy the software will be impacted by the decision to license the software during or after installation. Further information on applying keys during product installation is available **here,** 28 and further information on applying keys after installation is available **here.** 32

2.1   Choosing the Correct Installer

Choosing the Correct Installer

There are two installer options available for **PDF-XChange Products** - .msi and .exe. The .msi installers should always be given preference unless there is a good reason not to do so.

The .msi Installers (recommended)

The .msi installers are intended for both single users performing a standard, GUI-based installation, and large-scale networks performing unattended installations. They feature a large and dynamic range of parameters and options for managed, unattended installations. This manual will focus predominantly on the .msi installers as it is expected that the vast majority of network administrators will choose this option.

> **Pros:**
> - Ideal for unattended installations.
> - Large and dynamic range of installer options available.
> - Compatible with industry-standard deployment methods.
> - Easy to manage through centralized software management systems such as **Active Directory, SCCM** and **Kase.**
>
> **Cons:**
> - Discrete installers require knowledge of the architecture of the target system. Note that the 32-bit installer will not operate correctly on 64-bit systems.

The .exe Installer (not recommended for managed installations)

The .exe installer is intended for individual users who are using a graphical user interface (GUI) to install the product. It takes very few parameters/arguments and is not recommended in a managed environment.

The .exe installer is a wrapper around the .msi installer. The advantage of this installation setup is that it contains the ability to auto-detect the system architecture on which it is running and then install the appropriate 32 or 64-bit binaries. This is the simplest installation method for individual users in a GUI environment as it is largely automated and can be used in any supported version of **Windows.** The

disadvantage of this installation setup is that the wrapper is limited in what it can pass to the embedded .msi installer and is therefore less flexible with regard to deployment options.

Pros:
- One installer for 32 or 64-bit systems.
- Simple and standard installation experience.
- Good option for inexperienced/non-technical staff.

Cons:
- Limited parameters and options for unattended installation.
- Requires user interaction in order to install and update.
- More complicated to integrate into enterprise software management applications in comparison to the .msi installers.

2.2   Deployment via InTune

Deployment via InTune

Cloud-based deployment via **InTune** is available as a "line-of-business app". If you elect to deploy using this method, then it is advised to use the MSI installers, as they are discrete (the 32-bit MSI installers will not run on a 64-bit OS, and vise versa). If you want to deploy via **InTune** then set up a 'line-of-business app" and use the **Command-line arguments** field to pass licensing options (and any other options you might want to include). You can pass any option that the MSI can take at the command line in this manner.

The **PDF-XChange Editor** MSI installer switches are available **here.**
The **PDF-Tools** MSI installer switches are available **here.**
The **PDF-XChange Pro** MSI installer switches are available **here.**

If you are licensing the products then you need to pass the key, and using **KEYDATA** is recommended as it avoids the need to distribute the key as a file, which is required when **KEYFILE** is used instead.

Please note that licenses will fail if there are extraneous characters in the key. If keys are pasted from a formatted page then line feed and carriage return characters will often be included, so please ensure that these are removed. Licenses should be displayed as a single line when word wrapping is turned off in **Notepad.**

2.2.1 **Managing Keys via InTune after Installation**

Managing Keys via InTune after Installation

After performing a cloud-based deployment via **InTune,** 14 it may be necessary to mange the licenses separately from an installation. As in conventional **Active Directory** environments, a script can be pushed to call the **XCVault.exe Licensing Utility** 32 that installs by default with all **PDF-XChange** products to **C:\Program Files\Tracker Software\Vault**

The **XCVault.exe** options are detailed **here.** 42

In this example the software was deployed with a key, after which a second key was added, after installation and via **InTune**, then "auto-activated" via a Group Policy.

To do this you need to run a script on the target machine. There are multiple ways to run scripts via **InTune,** but the simplest approach is to make a single-line PowerShell script:

```
& "c:\Program Files\Tracker Software\Vault\XCVault.exe" /AddKeyData "PEP90-OZTGG5oVnEA/Br
```

The **&** at the beginning is important as it tells Powershell to interpret what comes next as a command. It is also very important that there is no white space present in the key. Please take care when copying and pasting, as pasting the formatted version as copied from our website may result in the addition of line feed and carriage return characters. The entire string must display as a single line in **Notepad** when word wrapping is turned off, otherwise the key will fail.

/AddKeyData tells XCVault.exe to accept a string as an argument for the key, as opposed to a key file. It is possible to use **/KeyFile** instead, but then it would be necessary to make the **KeyFile** available, and that means either a Share or additional work in the script will be necessary to upload the key file to use. It is much simpler to use the full key string - but again, please be sure that no white space is present.

/M forces XCVault.exe to try and put the key in the **HKLM** registry in order to make the license available to all users on the device, which is a "per machine" license setup. In order for that to succeed the script must be allowed to run as a system account. This is the **InTune** default, which means that additional configuration should not be necessary.

Add the script it in the **EndPoint Manager Admin Center** in order to push it. Once it has been added it will be visible in **Apps->Windows devices->Powershell scripts:**
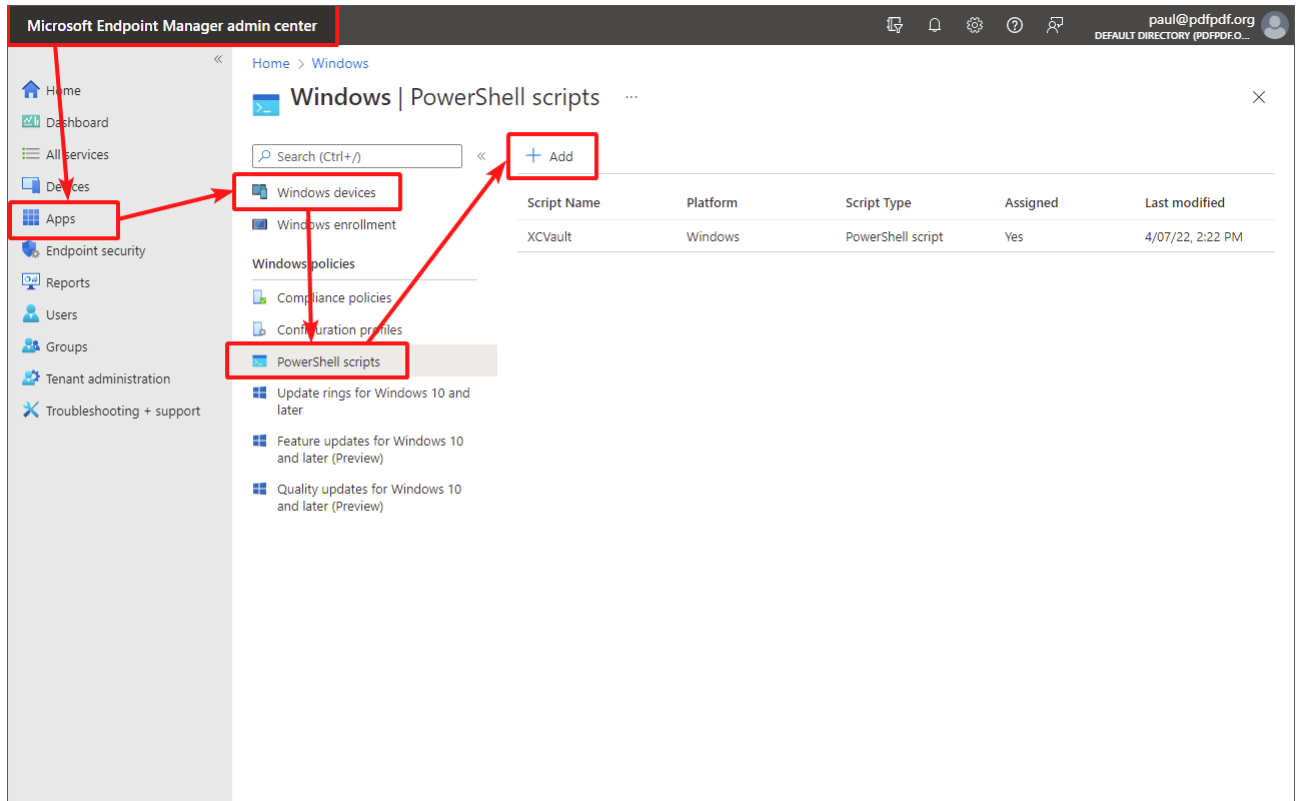
Follow the "Wizard":
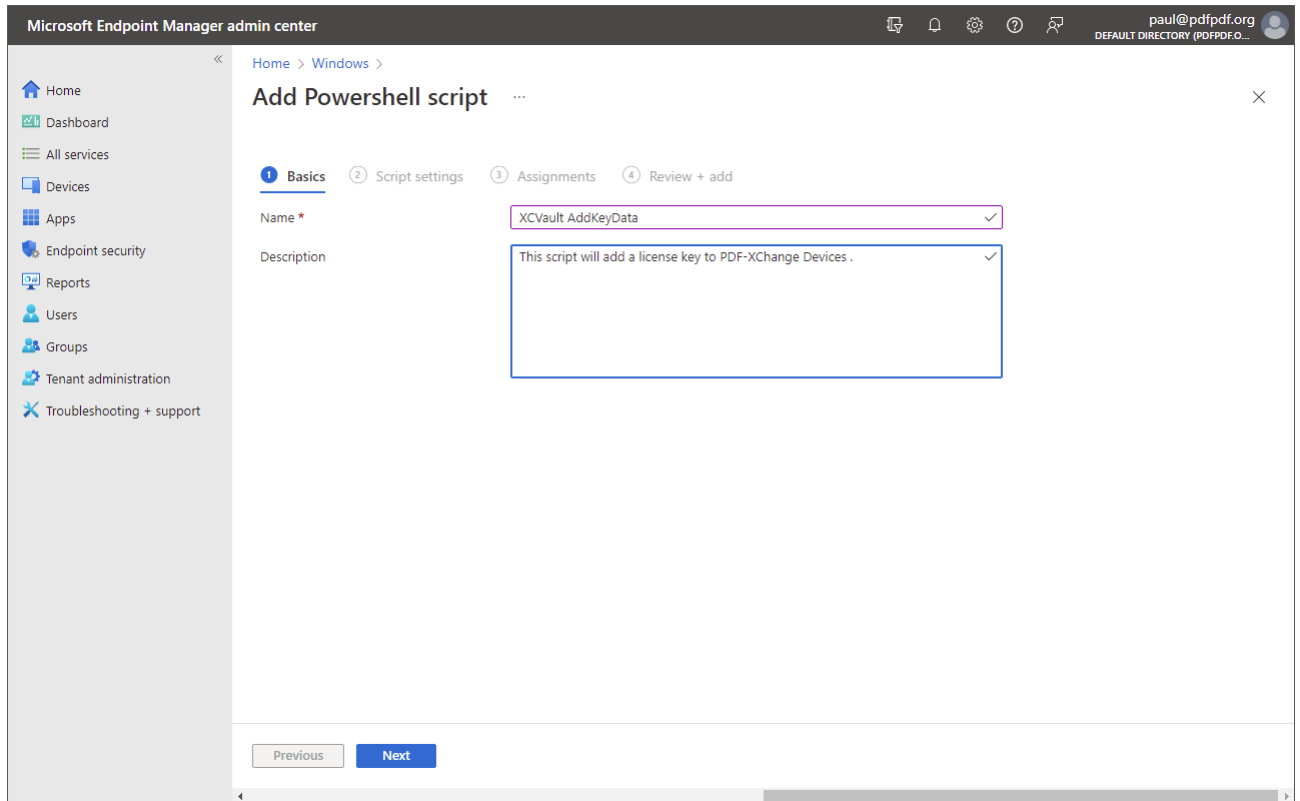
The defaults work for a per machine license. If you instead want to do a per user license, then remove the **/M** from the script and change "Run this script using the logged on credentials" to "Yes" and the key will go into HKCU and be only for that user:
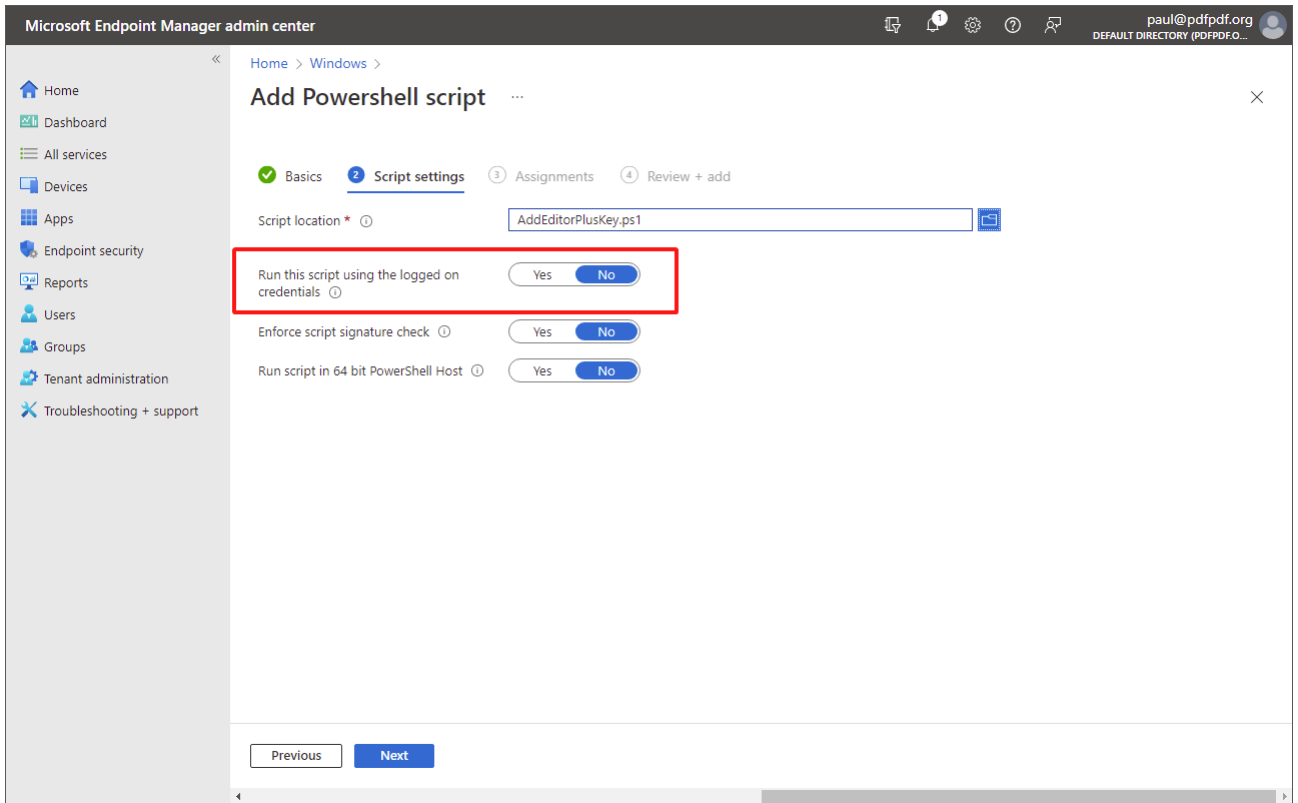
Select the appropriate users or groups to deploy to:
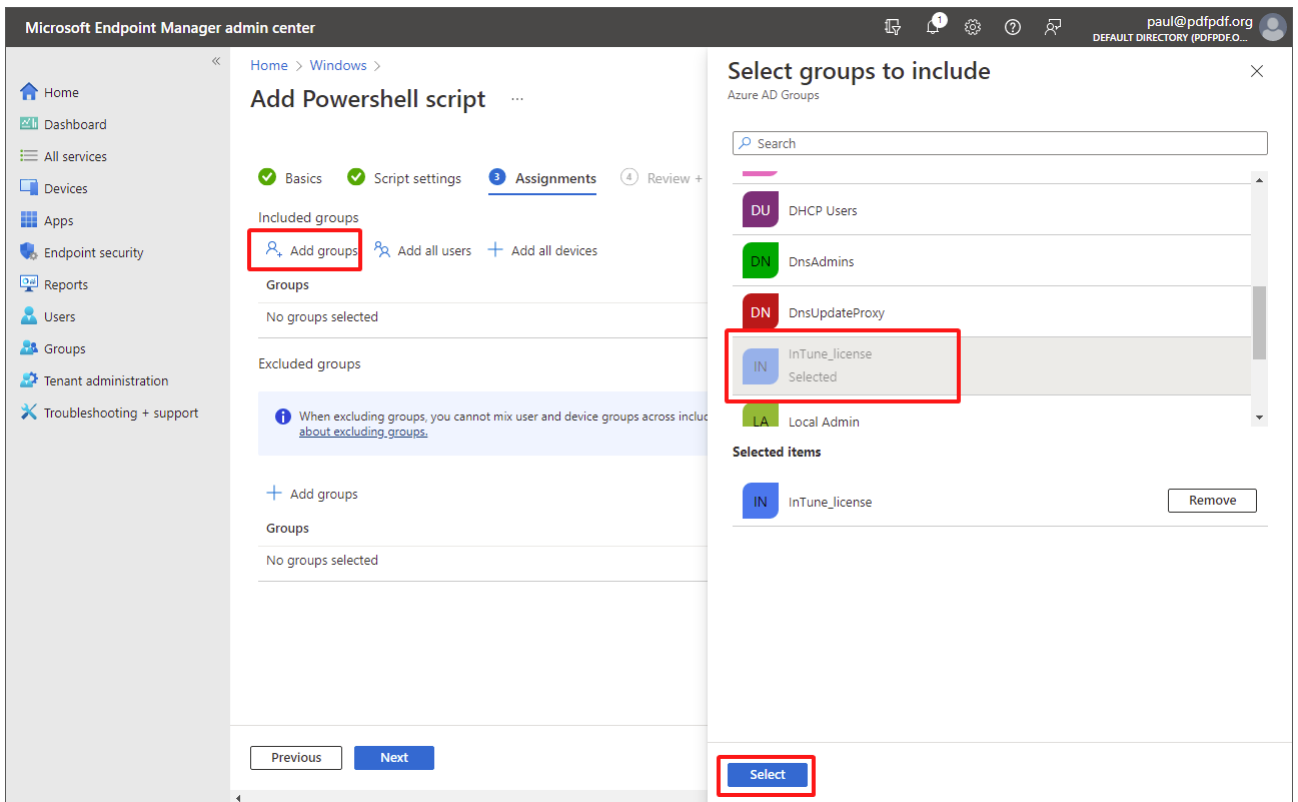
Then review and add the policy:
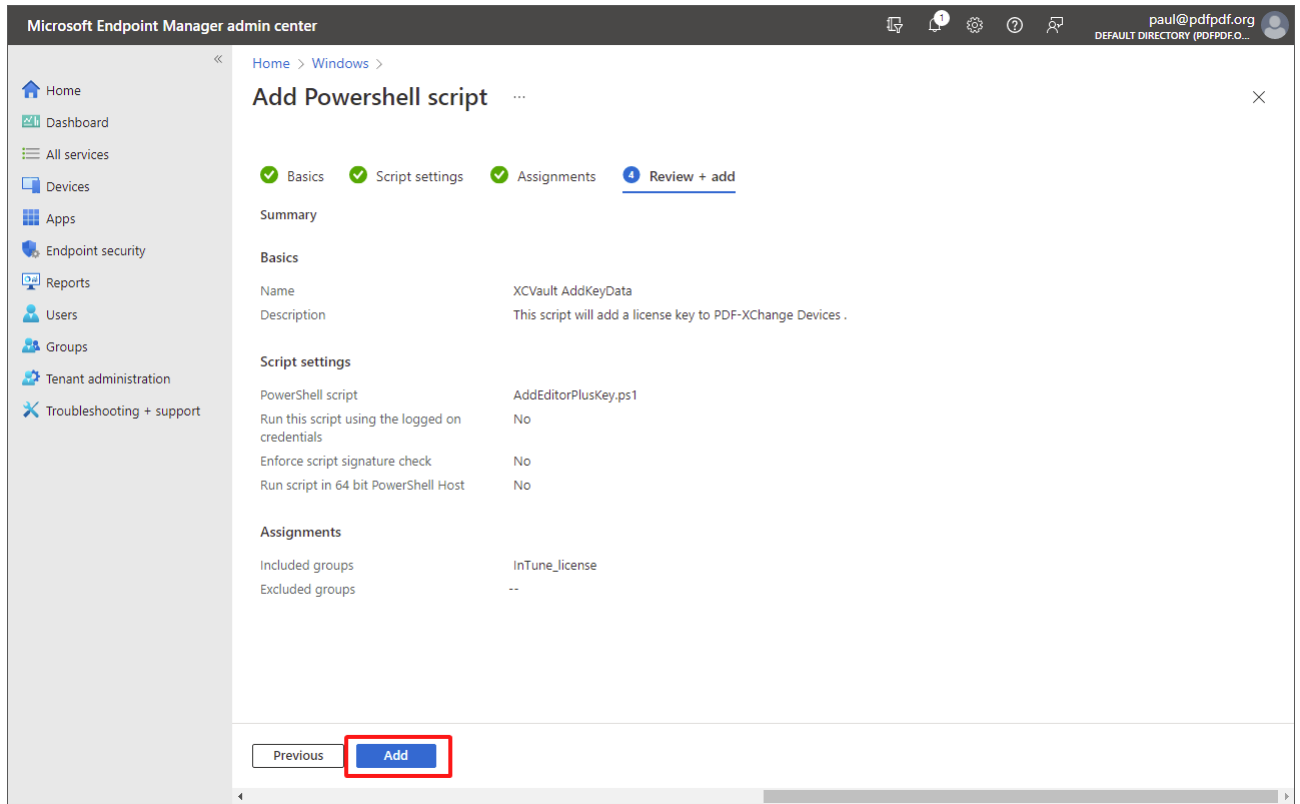
The process is then complete:
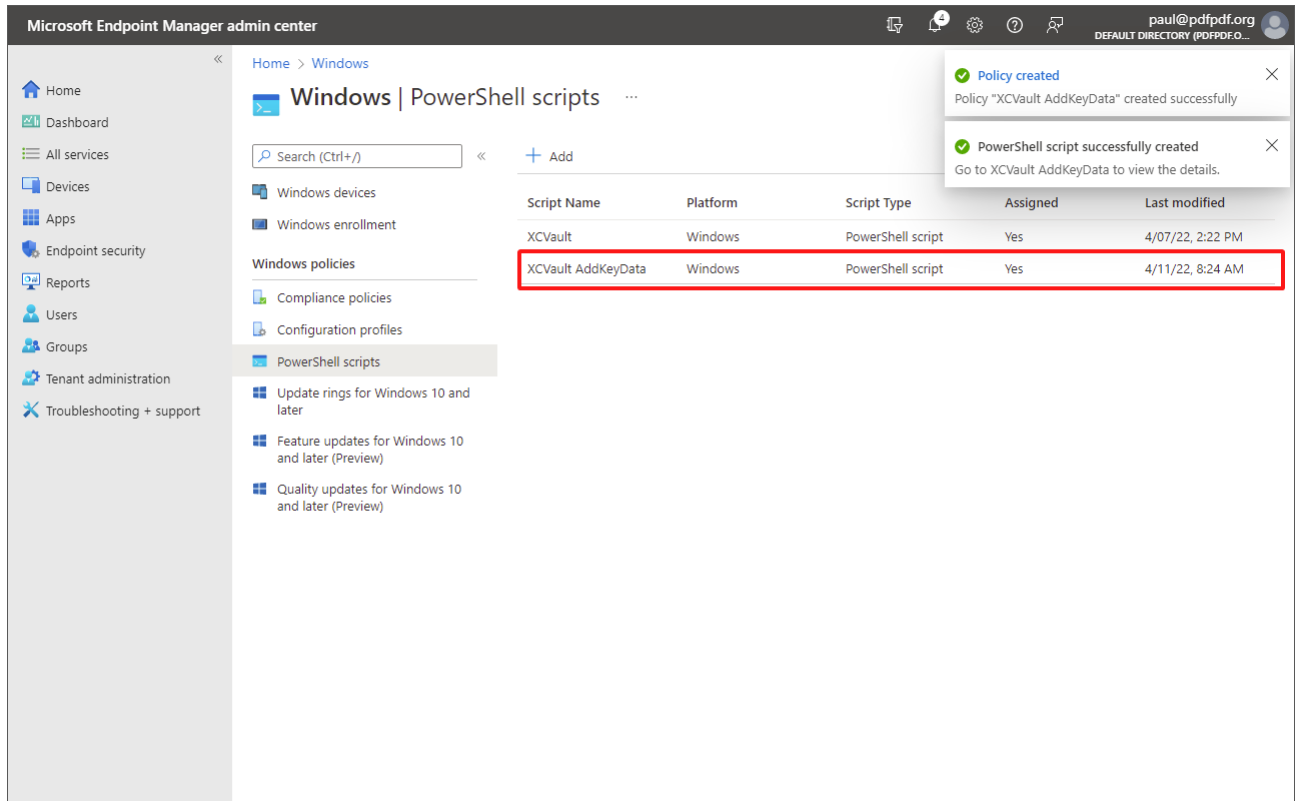
2.3   Licensing

 Licensing

Licensed and Unlicensed Versions

PDF-XChange encourages the liberal use of our free features for both private and commercial use. There are no 'trial' versions of the **PDF-XChange** applications - the installers for each product include all features for the application being installed and there is no time limit on usage, with the exception of the enhanced OCR feature - which is available for fourteen days from the date of first installation. The majority of features in **PDF-XChange Editor** are free to use, but some require a license. The other products that we produce, with the exception of the **PDF-XChange Printer Lite** virtual printer (for home use), require a license for all features to operate without creating watermarks on output content. If you want to use these features without the watermarks being applied then it is necessary to purchase and apply a license key. The presence of a license key and the associated absence of watermarks is the only difference between the free versions and the licensed versions of the **PDF-XChange** applications. Note that the free version of the software is referred to in many ways throughout the documentation - such as 'free version', 'trial version' and 'trial mode'. This simply means the absence of a license key in all cases. **PDF-XChange Editor** contains a **'Remove All Watermarks'** feature that can be used to remove the watermarks created when licensed features are used without a license.

The advantage of this approach to licensing is that only one installation is required. Users simply have to add a license key in order to upgrade to a licensed version - it is not necessary to download and install a different version of the software. Additionally, this approach allows for license granularity - a single installation can be used for a mix of licensed and unlicensed users in multi-user environments. The best approach in those cases is simply to install the application without a license key, then apply the appropriate key individually within a user session. This method is especially useful in **RDS (Terminal Server) Deployments,** as detailed **here.**

Please note that the licensing system was modified on the V10 release of the **PDF-XChange** family of products, as detailed **here.** 38

License Maintenance

The **PDF-XChange** product licenses do not expire. They can used in perpetuity *with the version of the software available at the time of purchase*. Maintenance on a license is an option that entitles the license

holder to update the software to newer versions released after their purchase and up to the specified date of maintenance. When a maintenance plan expires, the associated key does not expire - it remains valid for all builds of the product released up until the date on which the maintenance expired.

Expired Maintenance

Installing a previous build with a key that has expired maintenance

If the maintenance has expired on your license, it is still possible to use the key for versions of the product up to the build released prior to the expiration of your maintenance. A link to the installers for which your keys are valid is provided in your account, as detailed in the images below. If your key is current and has a valid maintenance plan, then the download link will be to the current build:

If your key is for an older major version and has valid maintenance, then you will be offered the last build of that major version as well as the option of getting a free serial for the current major version:

If your key has expired maintenance (for any major version) then you will be offered a link to the latest build of the product for which your key is valid:

Note that the license key is still valid for build 6.0.321.0 despite the maintenance being expired in the third image above. If the key is used in the 6.0.321.0 installer, as detailed in **(figure 1),** then the dialog box detailed in **(figure 2)** will be displayed:
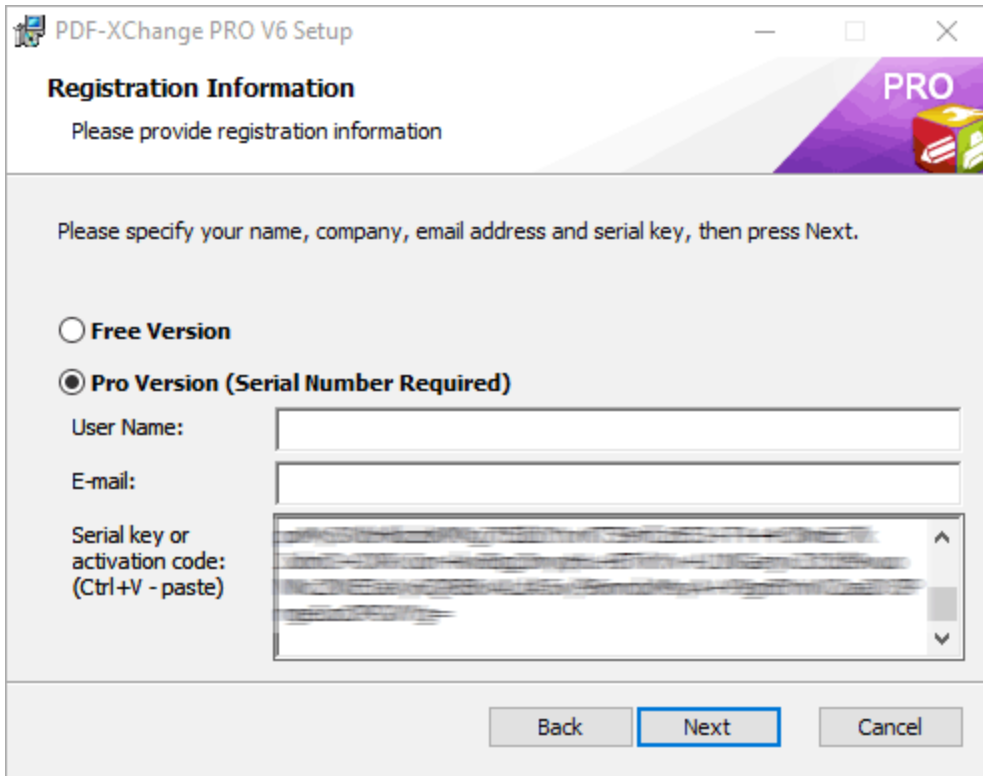
Figure 1. PDF-XChange PRO V6 Setup Dialog Box
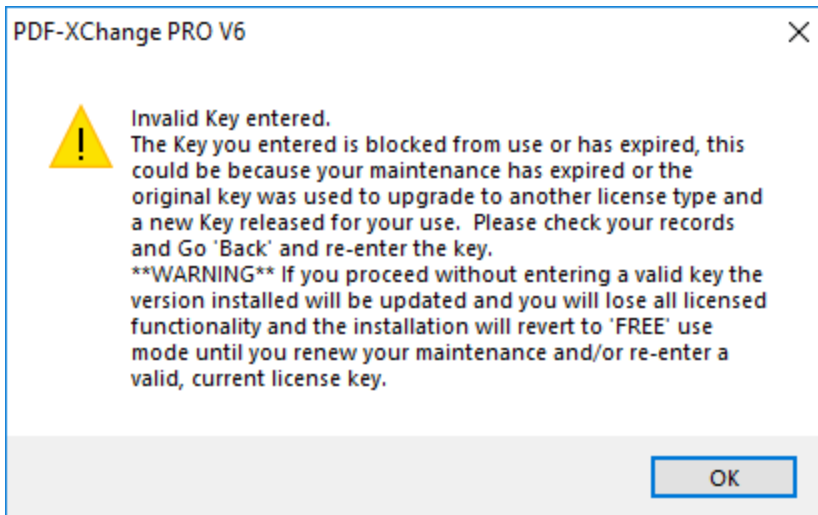
Figure 2. PDF-XChange PRO V6 Dialog Box

This message is intended for users who are attempting to install a version for which their key is not valid, as would be the case if the key in the third image above was used for the most recent build. However, as the key is being used for the version for which it is valid (as the download link was used from the user account) this message can be ignored. If the user subsequently updates the software to a version for which their key is not valid, then it will revert to 'trial mode' and watermarks will be added when the licensed features are used. It is for this reason that we

recommend users **turn off updates** in cases where their maintenance has expired and they do not intend to renew their plan.

License Key Formats

License keys can be in the format of either a file or a text string. The license key files that **PDF-XChange** issue are archives that contain the license key in the form of a long string of characters and have the default name **"personal.xcvault." PDF-XChange** uses the term "key file" for the **.xcvault** file and "key data" for the string of characters (i.e. the key itself) throughout our documentation and forums. Both the key file and the key data can be used to apply licenses during or after installation, and for all users or only the current user as required.

2.3.1 **Per Machine/User and Windows Registry locations**

License Keys and the Windows Registry

License keys applied to **PDF-XChange** products during can be available on either a Per Machine or Per User basis depending on how they are installed.

When the software starts it look to both **HKLM** and **HKCU**, specifically:
  o **HKEY_LOCAL_MACHINE\SOFTWARE\Tracker Software\Vault**
  o **HKEY_CURRENT_USER\SOFTWARE\Tracker Software\Vault**
 and uses any valid keys found.

Adding keys to **HKLM** requires elevated rights, the application installers also require elevated rights. The impact of this is that *keys passed to the installer are always* "*Per Machine*" as the key will be placed in **HKLM**.

Adding keys post install defaults to Per User unless an elevated command prompt is used to call **XCVault.exe** with the **/M** option. (See XCVault Command line options 42 .)

Using the GUI to add a license, even is using "The Administrator" account for a machine will put the key in HKCU as the software is running as that user, it goes into the Administrator's **HKCU** - not **HKLM**.

To reiterate - to have a Per Machine key it MUST be applied during install or by calling XCVault.exe with elevated rights AND /M

This exasmple shows a 10 user "Per Machine" key that is in HKLM and a single user key in HKCU:
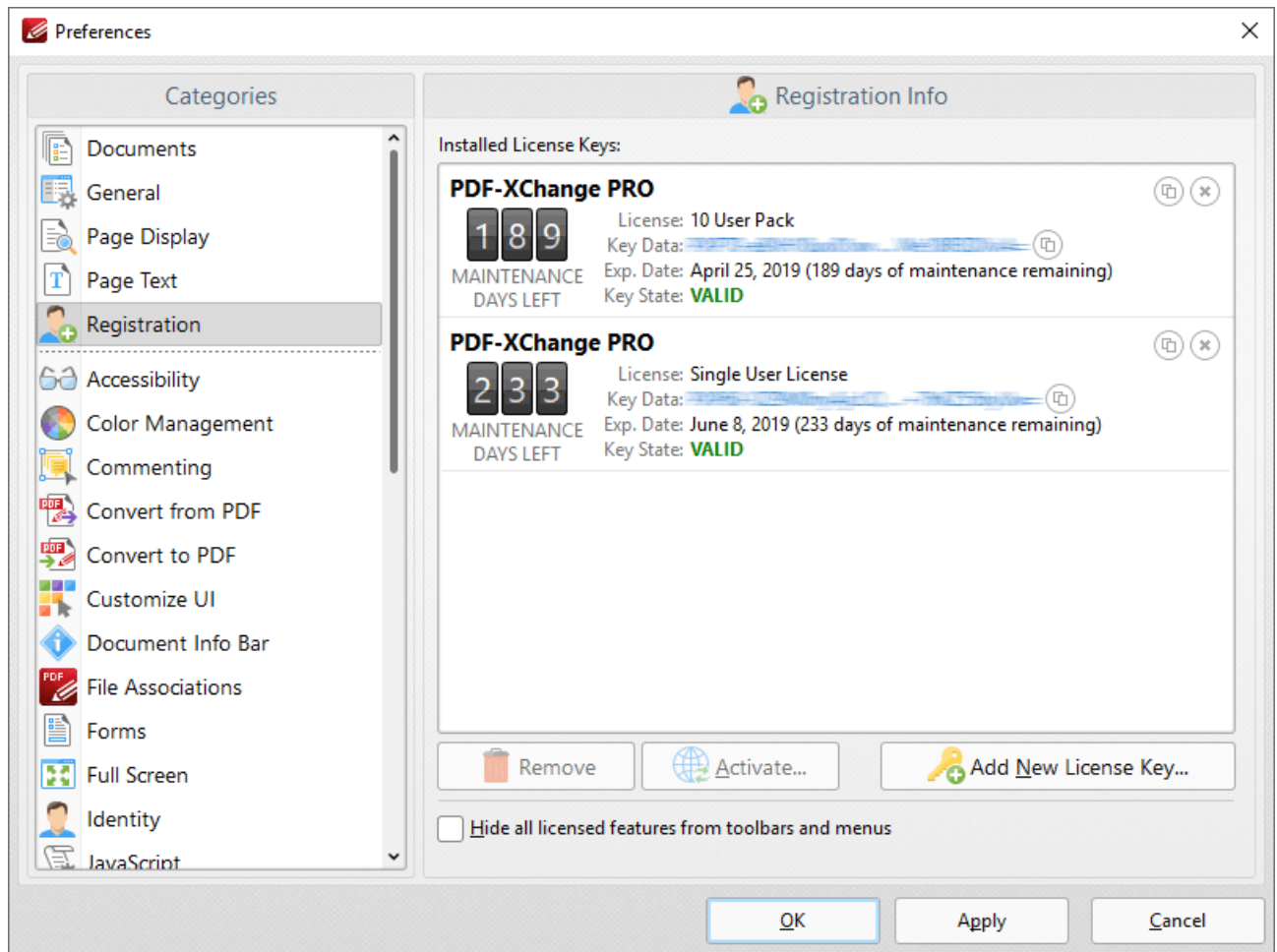
Figure 3. PDF-XChange Editor Registration Preferences, Keys for HKLM and User-Specific HKCU Displayed

One advantage of this method is that separating keys into **All Users/Per User** enables the creation of a mixed licensing environment in which some users have access to all features of the software and other users have access to only the free features. This is of particular benefit on **Terminal Servers (RDS)** where it may be necessary to limit the number of licensed users but still make the unlicensed version available to other users.

Per-User License Application

Keys must be applied from within a user's **Windows** session in to apply them in a per-user context, as this ensures that the key is stored in that user's HKCU. This can be performed:

   By the in-session user:

- Through the application GUI - either during installation, or via the application preferences after installation.
- Using **XCVault.exe** at the command line or in a script.
- Double-clicking the key file.

Remotely/unattended:

· As a *login, runonce* or other script that runs as the user.
· Via a Group Policy script applied to the user context.

Note that copying the registry key from an installed machine will not be sufficient without taking additional steps, as the keys are encrypted with machine-specific seeds. Further information about this process is available **here.** [49]

Per-Machine License Application

Keys must be placed in HKLM in order to be applied for all users. This requires administrative rights and can be performed:

· During installation - keys applied during installation are always placed in HKLM and available to all users.
· Through an administrator's account (or unattended) using **XCVault.exe** at the command line or in a script.

Note that applying the key through the GUI (for example via the application preferences or double-clicking the xcvault file) will not put the license in HKLM as desired, but in HKCU for the administrator's account.

2.3.2 **Applying Keys During Product Installation**

Applying Keys During Product Installation

License keys applied to **PDF-XChange** products during installation are placed in **HKLM** and subsequently available for all users. Note that installers must be run by an account with the necessary privileges. If an account that does not have these privileges is used to initiate an installer then the **Windows UAC** will be triggered and prompt for an account with the necessary rights. If these cannot be given then the installation will be canceled.

If you want to apply a license to only a specific group of users then it is necessary to **apply the license after the installation.** [32]

GUI-Based Installations

The installer runs as a privileged user, which means that the license will be placed in **HKLM** for all users, regardless of which user initiated the installation. When an installation is performed via the GUI, **KEYDATA** (the alphanumeric string that is the license key, as detailed below) can be pasted from the **Windows** clipboard into the installer:
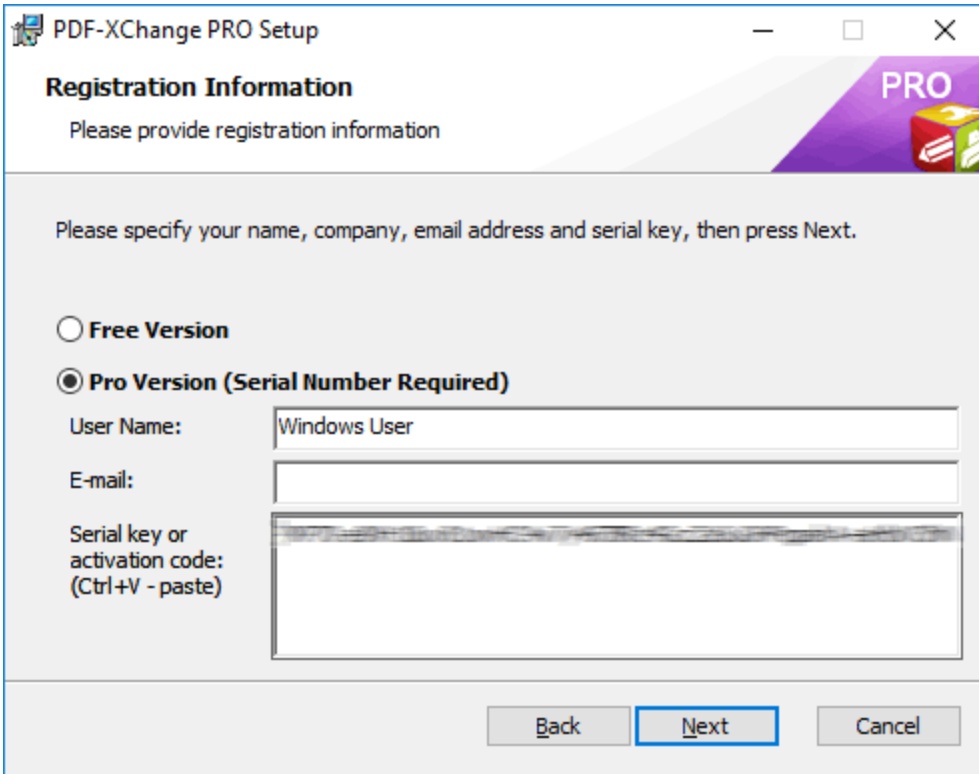
Figure 1. PDF-XChange PRO Setup Dialog Box (GUI Installation)

The license key will be placed in HKLM (and encrypted) when installation is complete:
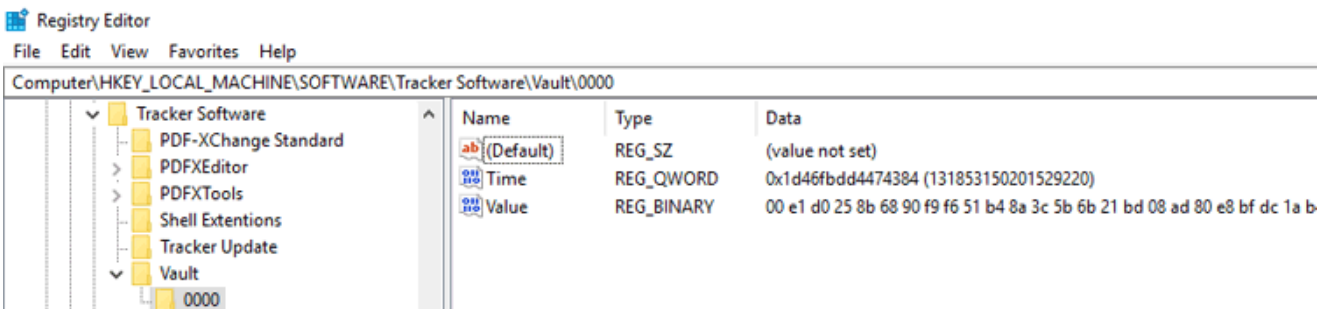
Figure 2. Windows Registry Editor, Encrypted License Key in the HKLM Registry Hive for All Users

Note that a **KEYFILE (XCVault file)** cannot be used for a GUI-based installation.

Unattended Installations

Applying a key during an unattended installation requires the use of the .msi installation switches **KEYFILE** or **KEYDATA.** Unattended installations put the license keys into HKLM (as they run as an elevated account that does not have access to HKCU) and make the license keys available to all users on the system. Further information on the .msi installation switch options is available in the online manuals for each product:

- The **PDF-XChange Editor** .msi installation switches are detailed **here.**
- The **PDF-Tools** .msi installation switches are detailed **here.**
- The **PDF-XChange Printer Standard** .msi installation switches are detailed **here.**
- The **PDF-XChange PRO** .msi installation switches are detailed **here.**

Please note that we do not recommended using the .exe installers for unattended installations due to the issues detailed **here.** 12

Methods for Passing License Keys to an Installer

There are two methods available for passing a license key to an installer - **KEYFILE** and **KEYDATA.** These methods both have advantages and disadvantages in comparison to each other, but the end result is the same regardless of which method is used to pass the key.

KEYFILE

Pros:
- Uses simple syntax.
- Avoids CR and LF issues in license key string.

Cons:
- Sensitive to file system permissions issues.
- Potential for challenges when used with user-mapped drives.

KEYDATA

Pros:
- Does not depend on file system permissions.
- Independent of network structure.
- When used with a transform can be re-applied for multiple installations without modifying the transform.

Cons:
- The length of the string can result in an unwieldy command that is difficult to read.

- Potential for CR and LF issues when copying/pasting the string.

Examples

Install the **PDF-XChange PRO** bundle using **KEYDATA:**

```
msiexec /i ProV10.x64.msi /qb KEYDATA="PXP70-
...XivAvAUl4Q+XivqqLSozuRTqTCxnRv0sNR1i2UTPSA5AvAUl4Q+UTPSA5AvAUl4QXivqqLSozuR
TqTCxnRv0sNR1i2UTPSA5AvAUl4Q="
```

Install **PDF-XChange Editor** using **KEYFILE:**

```
msiexec /i EditorV10.x64.msi /qb KEYFILE="\\UNC\path\to\xcvaultfile.xcvault"
```

See **here** 63 for passing the key via a transform (MST file).

2.3.3   **Applying Keys After Product Installation**

Applying Keys After Product Installation

After installation has taken place, it is possible to deploy license keys on either a per-user or per-machine basis. License keys can be deployed through a GUI session or unattended in both cases. When **PDF-XChange** products are installed, the default setup installs a utility called **XCVault.exe** and associates .xcvault files with that utility:
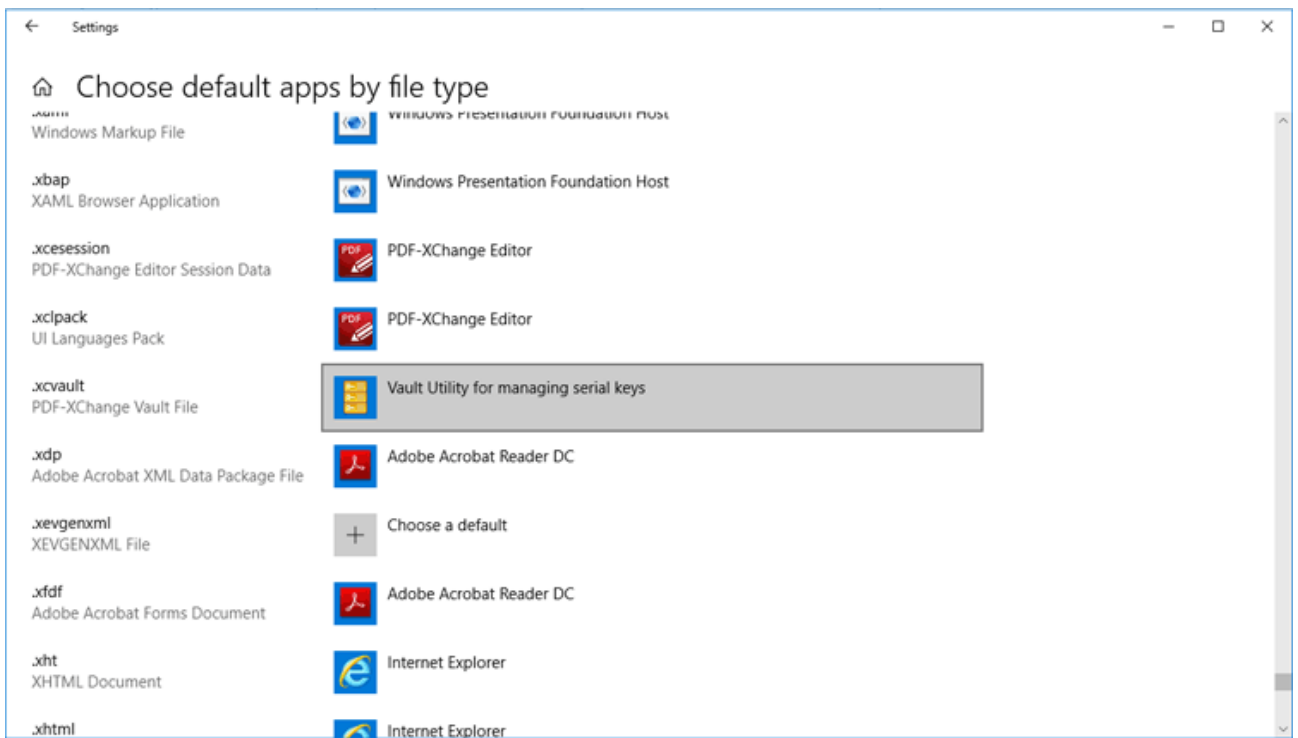
Figure 1. Windows Settings, Default Apps by File Type

.xcvault files are files that **PDF-XChange** provide that contain the license information and serial key. The default location of **XCVault.exe** is:

%programfiles%\Tracker Software\Vault\XCVault.exe.

Per User

Via the GUI

Using Key File

Users can simply double-click the .xcvault key file in order to apply their license key, which will then apply even when no **PDF-XChange** products are running:
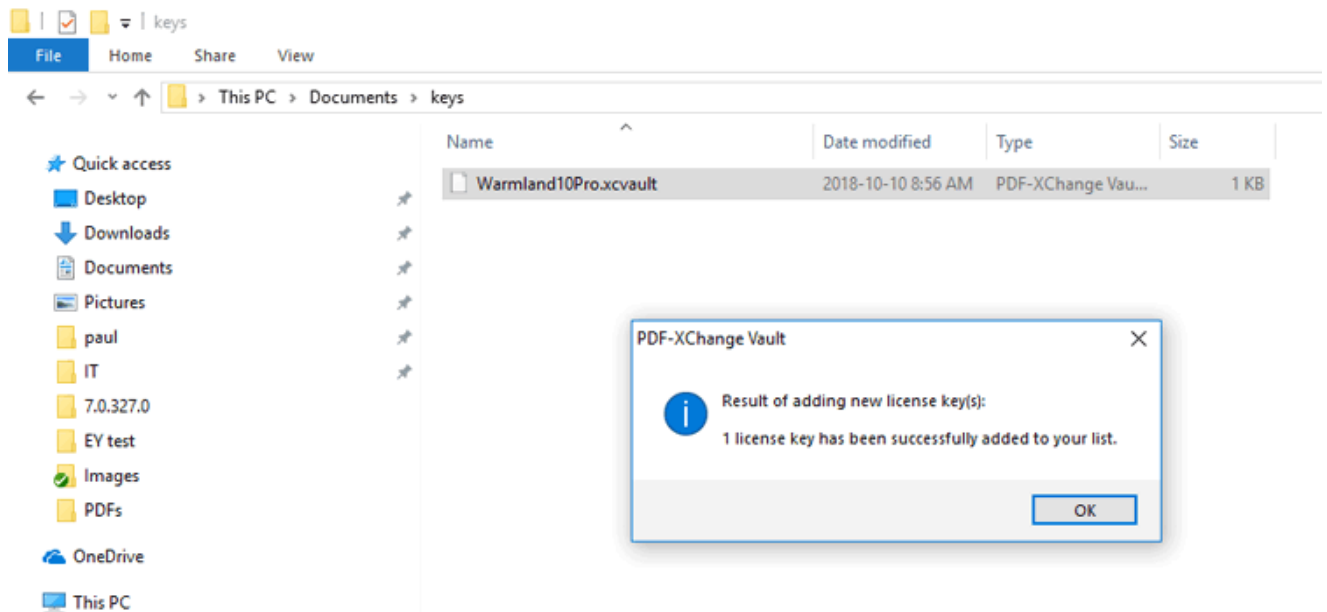
Using Key Data

The "key data" is the license key string, which can be entered via the GUI of the products:
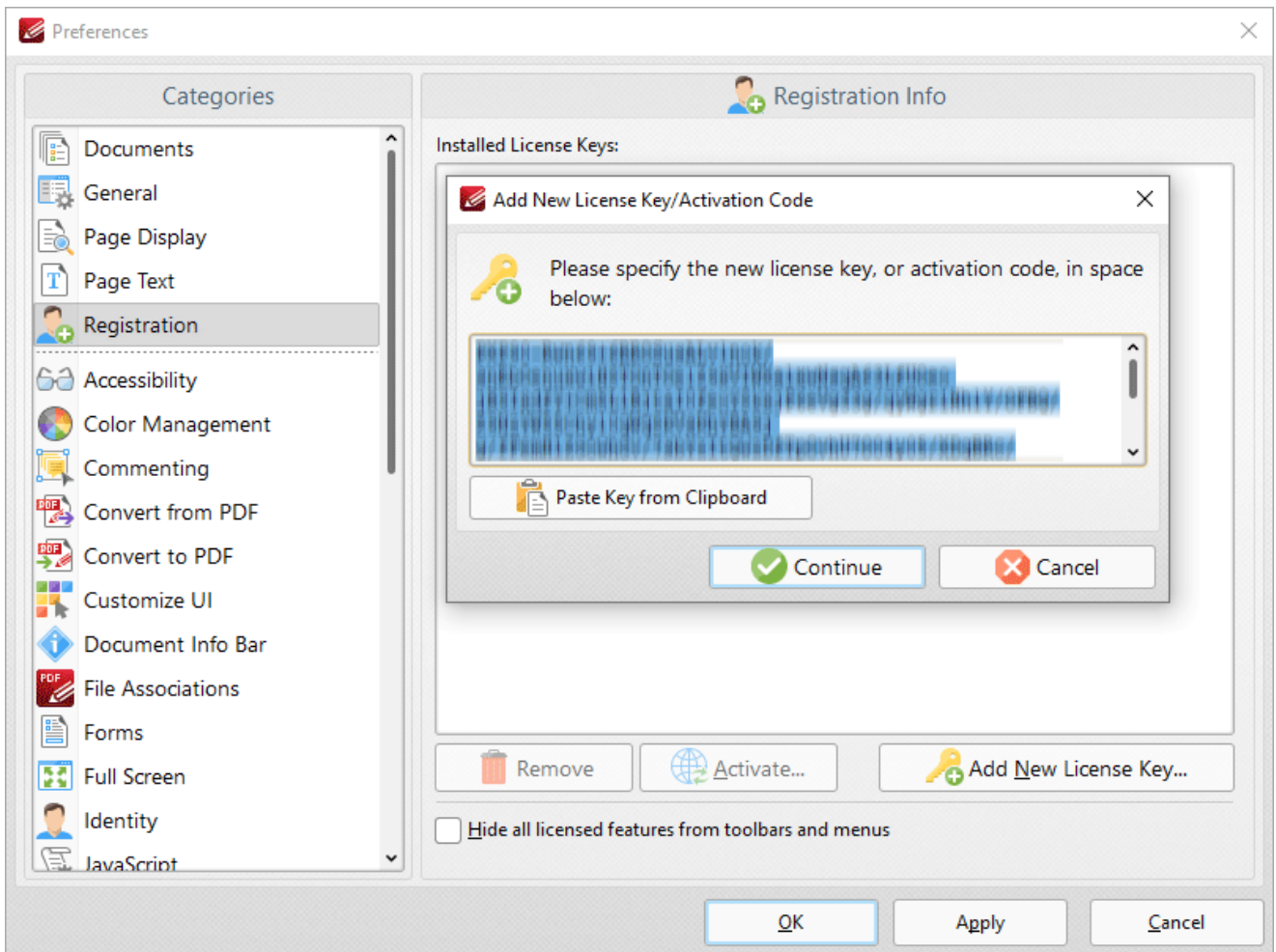
Figure 2. PDF-XChange Editor GUI, Registration Preferences, Add New License Key Dialog Box

Unattended

Use the **XCVault.exe** in conjunction with the **/AddKeys** command line in order to apply licenses remotely/in an unattended setup. Further information about the **XCVault.exe** utility and its options is available on the licensing page of the online manuals:

- The licensing page for **PDF-XChange Editor** is available **here.**
- The licensing page for **PDF-Tools** is available **here.**
- The licensing page for **PDF-XChange Printer Standard** is available **here.**
- The licensing page for **PDF-XChange PRO** is available **here.**

Please note that the **XCVault** utility *must be run as the logged-in user*. The simplest way to achieve this is through the use of a login script. The most common reason for the failure of unattended installations is when pushing scripts that run under a system account that does not have access to the current user's HKCU hive.

Examples

```
"%programfiles%\Tracker Software\Vault\XCVault.exe" /AddKeys "\
\UNC\path\to\Personal.xcvault"

"C:\Program Files\Tracker Software\Vault\XCVault.exe" /AddKeys "C:
\Users\fred\Desktop\Personal.xcvault"
```

Please note the following when using **XCVault.exe** to perform the unattended installation of a license key on a per-user basis:

- **XCVault.exe** can only be used in conjunction with .xcvault files and does not accept the license key itself.
- The command must be issued by the user for whom the license is to be applied. System accounts cannot be used as they do not have access to the target user's HKCU registry hive.
- Although relative paths can be used, using the full literal paths to both the **XCVault.exe** executable and the .xcvault file is recommended.
- An .xcvault file can only be used on a network resource when the user running the command has read-access to the file

Per Machine

Via the GUI
Please note that it is not possible to add a license for all users via the GUI when logged in as an administrator. Using the GUI settings (or the .xcvault file) in that case will place the key in HKCU for the administrator's account and from there it is not available to other users.

Unattended
Applying license for all users (per machine) after installation for all users requires the use of the **XCVault.exe** utility with administrative privileges and the **/M** switch.

Examples

```
"%programfiles%\Tracker Software\Vault\XCVault.exe" /AddKeys /M "\
\UNC\path\to\Personal.xcvault"

"C:\Program Files\Tracker Software\Vault\XCVault.exe" /AddKeys /M "C:
\Users\fred\Desktop\Personal.xcvault"

"C:\Program Files\Tracker Software\Vault\XCVault.exe" /AddKeys /M /R "C:
\Users\fred\Desktop\Personal.xcvault"
```

- **/R** instructs **XCVault.exe** to apply this key without encryption, which is required for load balancing. See **here** [49] for further information on this topic.

Appying a License to HKLM

The image below shows a license applied on a per-user basis (and therefore in HKCU):
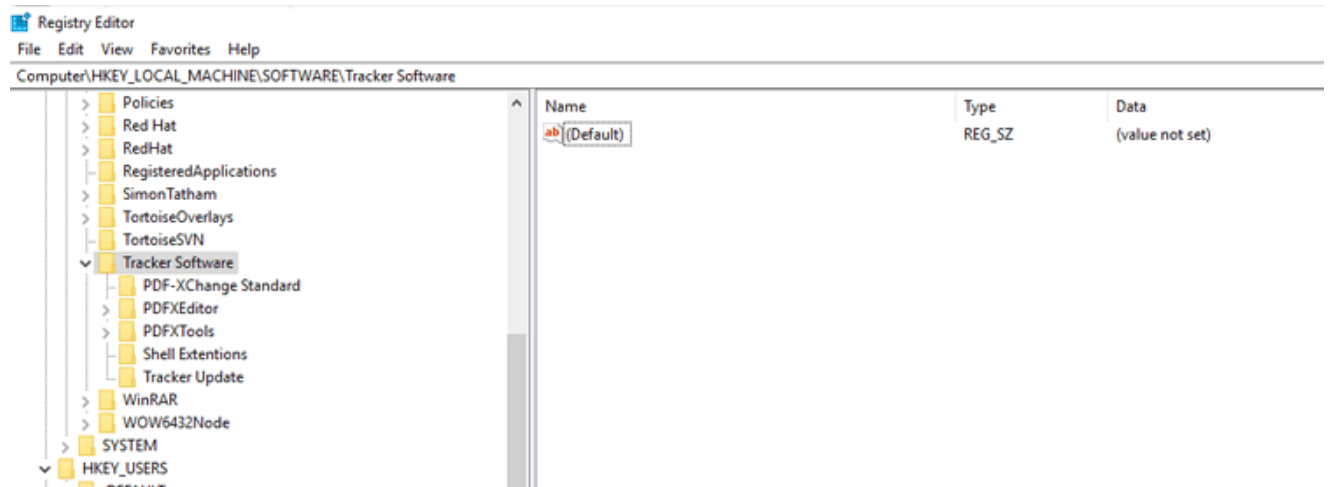
Figure 3. License Applied in HKCU

The following command line (used at an administrative command prompt) can be used to apply the license to be available to all users (HKLM):

"c:\Program Files\Tracker Software\Vault\XCVault.exe" /AddKeys /M "<path to .xcvault file>"

For example:
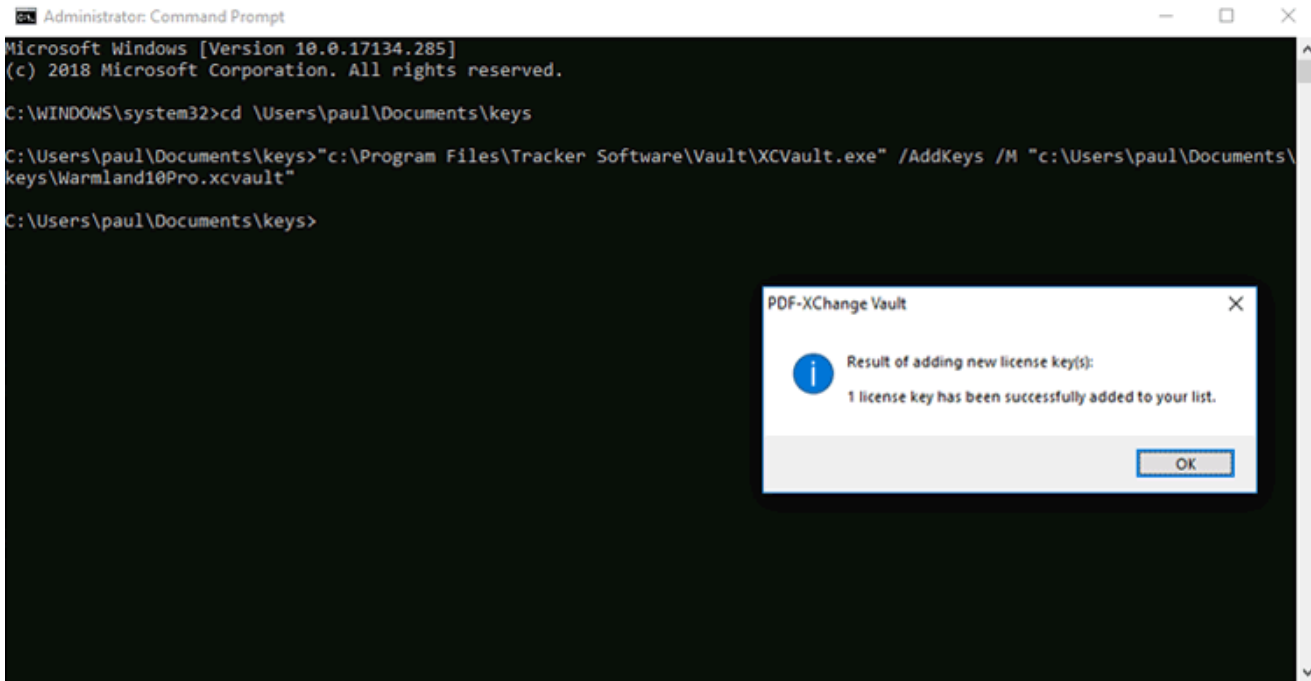
Figure 4. Administrative Command Prompt, Sample Command Line

This puts the license key detailed in **(path/to/XCVault file)** into HKLM and makes it available to all users:
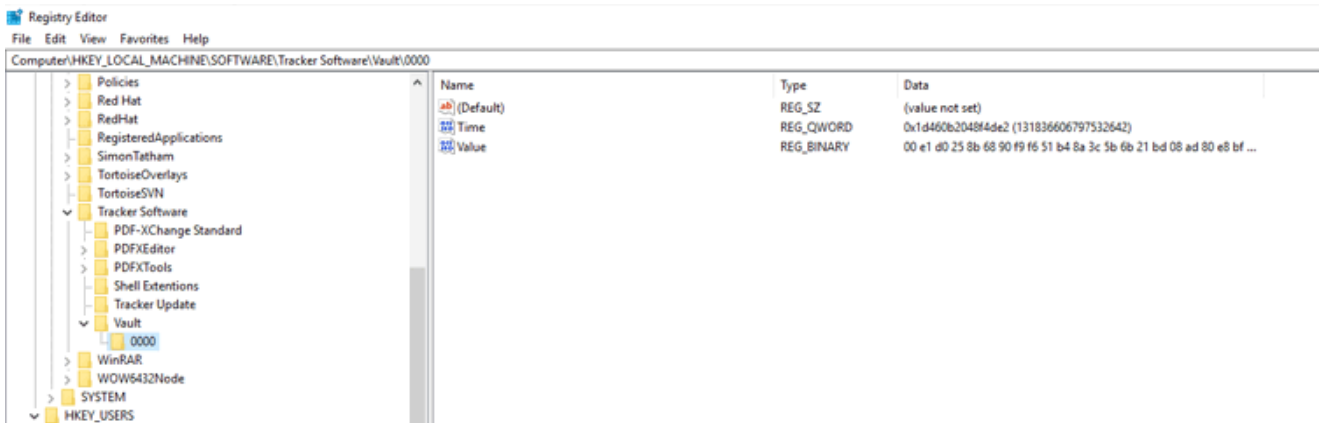
Figure 5. License Key in HKLM

2.3.4 **V9 (and later) Activation**

V9 (and later) Activation

The licensing system was improved in version 9 of the **PDF-XChange** family of products, and from January 14th 2021 it became necessary to activate license keys manually. Instructions on how to activate keys are available **here.** Please note that the **XCVault.exe** utility installed with all **PDF-XChange** products can be used to activate keys silently in versions 9.0.351.0 and later. Information on silent activation is available **here.** [39]

2.3.4.1   Silent Activation

Silent Activation

Activation can be either done by a user when prompted by the Editor, or an Admin can set up mechanisms to silently activate instances. This an greatly improve the user experience by taking the burden of activation from them.
Users can perform activation when prompted to do by **PDF-XChange Editor,** or a system administrator can set up mechanisms to silently activate instances - which can improve the user experience as it takes the burden of activation away from them.

There are two methods available - the first is to use a Group Policy, and the second is to use a script.

Active Directory Group Policy

Apply the "Automatic Key Activation" Group Policy found in the "Key Activation" section of the "Tracker Software Vault" Active Directory Administrative Template. The latest template files are available **here.** Details on how to use the templates are available **here.**

Enable the policy detailed below, and **PDF-XChange** products will then check for and silently activate any keys they find that are not yet activated:
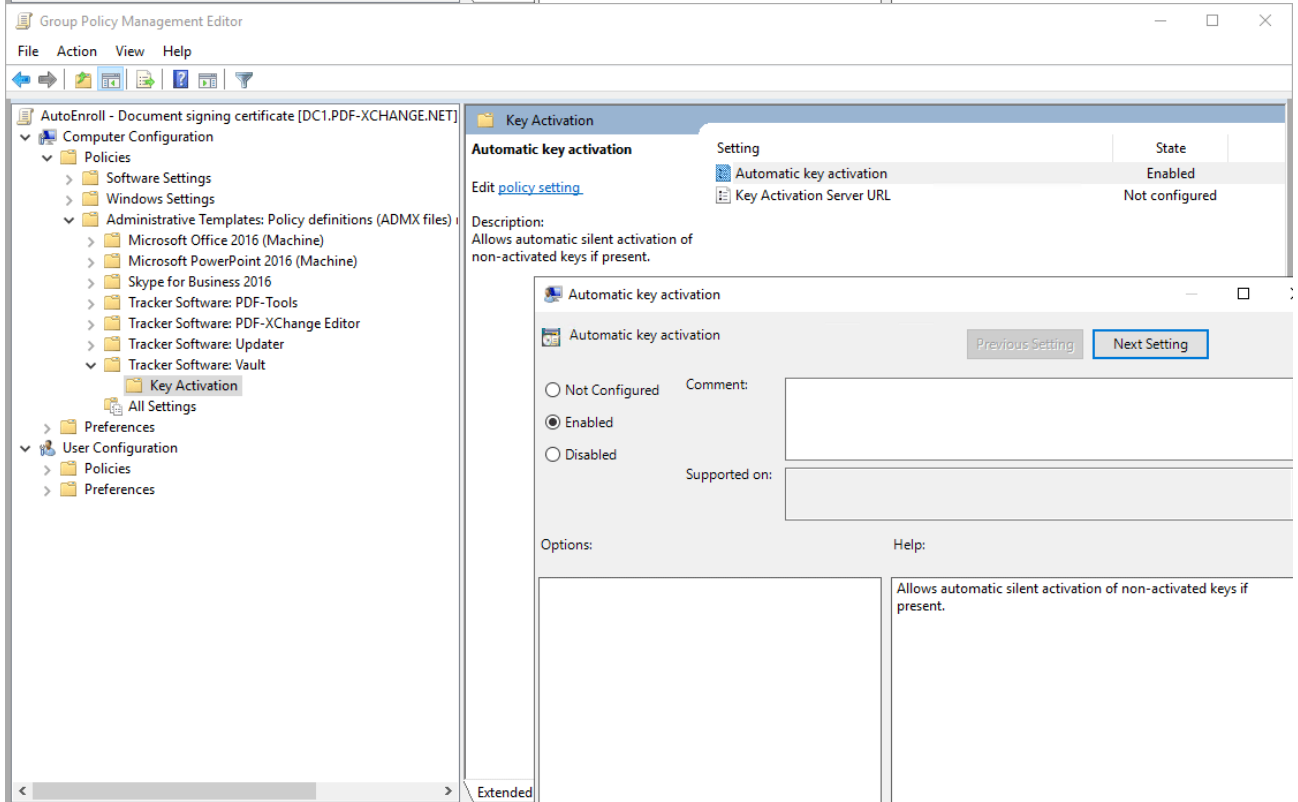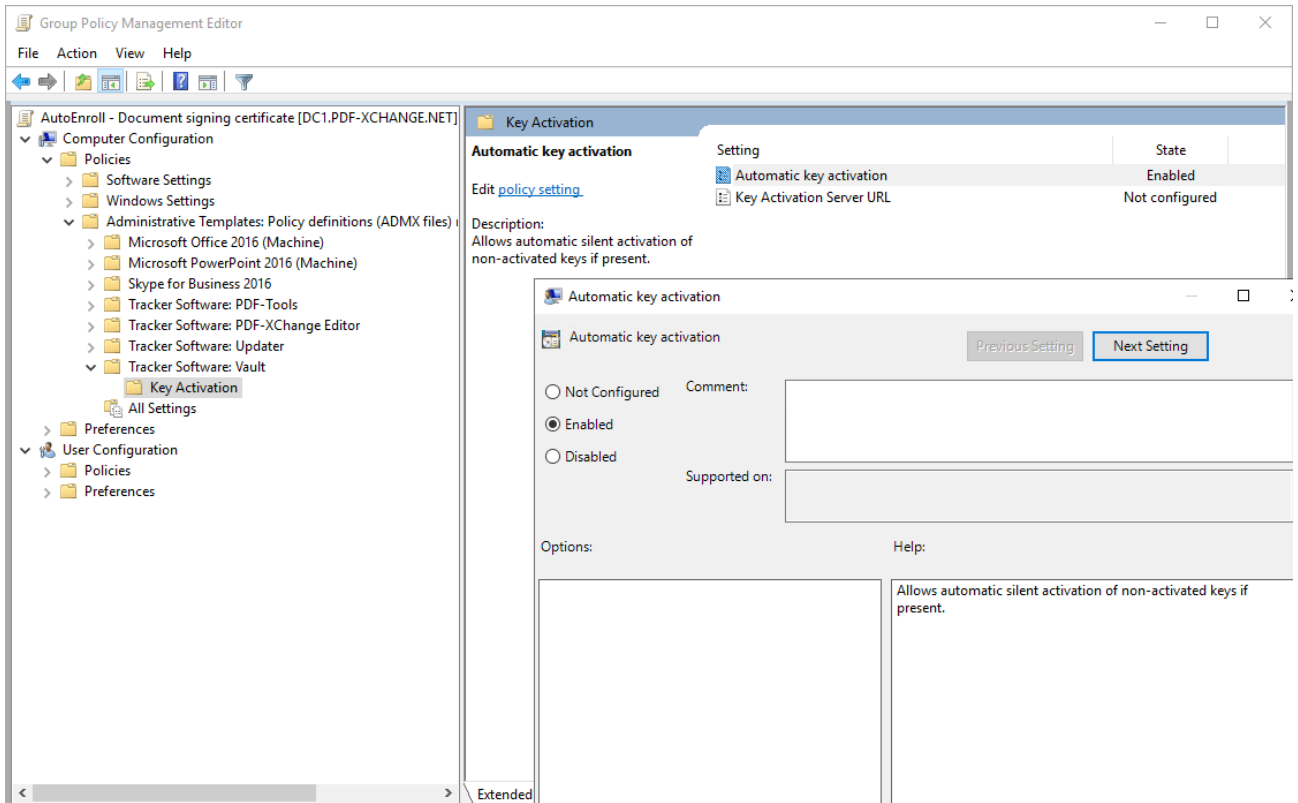
XCVault Utility

The XCVault utility that gets installed with all **PDF-XChange** products can be used to silently activate keys for environments that cannot make use of Active Directory group policies. XCVault.exe is installed by default in C:\Program Files\Tracker Software\Vault and can be called as the user via script. The XCVault utility can be run from either an administrative account (for per-machine licensing operations) or a user account (for per-user licensing operations). Please note that activation must be called as the target user, and it requires access to the user's registry (HKCU). Full details on the XCVault options available for V8 are listed **here.** V9 details for XCVault are available **here,** and V10 details are available **here.**

The XCVault options relevant to activation are:

```
/ActivateKeys [/S] [/AA]

 Activates installed keys.

Parameters:

 /S            Specifies silent mode and suppresses any messages with
                information about results.
 /AA           Specifies that currently activated keys will be reused in the
                activation process.
```

Examples:
```
 /S            Specifies silent mode and suppresses any messages with
                information about results.
 /AA           Specifies that currently activated keys will be reused in the
                activation process.
```

Examples

Silently activate all keys present in the current users registry (note that previously activated keys will be ignored):

```
"%ProgramFiles%\Tracker Software\Vault\XCVault.exe" /ActivateKeys /S
```

Silently activate all keys present in the current user's registry. Previously activated keys will be resent activation data. This option is useful for reactivating a device that has had its activation removed:

```
"%ProgramFiles%\Tracker Software\Vault\XCVault.exe" /ActivateKeys /AA /S
```

2.3.5   **XCVault Command Line Options**

XCVault Command Line Options

XCVault.exe is a licensing utility that is by default installed with all **PDF-XChange** software. Its function is to facilitate managing license keys for **PDF-XChange** products. **XCVault.exe** is installed by default to:

C:\Program Files\Tracker Software\Vault
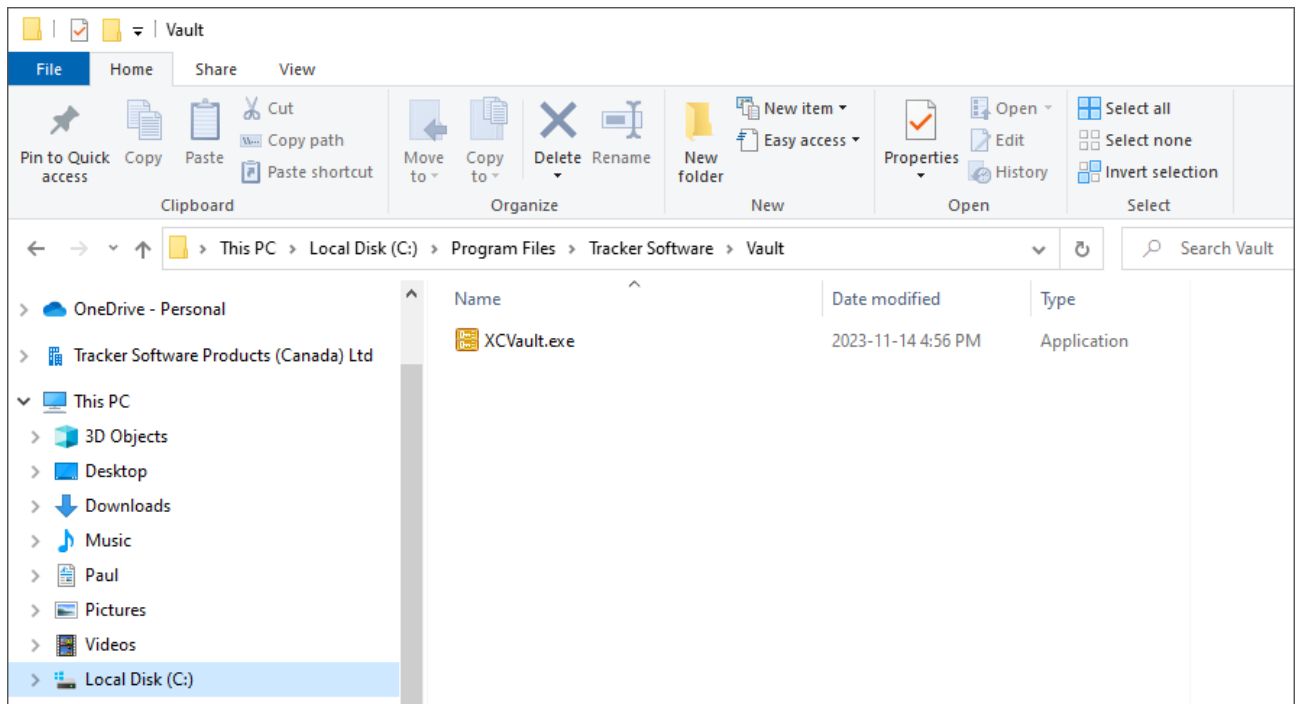
The command line options detailed below are available for the **XCVault** utility in the **PDF-XChange** family of products:

Usage: **XCVault.exe command [parameters]**

The following commands are available:

/AddKeys

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

Syntax

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

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

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

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

Examples

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

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

/AddKeyData

This command installs the specified key.

Syntax

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

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

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

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

Examples

```
xcvault.exe /AddKeyData "PXP90-CxL56n1SDEgUuF...+LB7kDyA"
```

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

/OpenKeys

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

Syntax

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

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

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

Example

```
xcvault.exe /OpenKeys
```

/ProtectKeys

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

Syntax

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

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

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

Example

```
xcvault.exe /ProtectKeys
```

/ActivateKeys

This command activates installed keys.

Syntax

> **xcvault.exe /ActivateKeys [/S|/AA]**
>
> **/S** – specifies silent mode and suppresses any messages with information about results.
>
> **/AA** – specifies that currently activated keys will be reused in the activation process.

Example

> `xcvault.exe /ActivateKeys`

/RemoveKeys

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

Syntax

> **xcvault.exe /RemoveKeys [/S|**
>
> **/S** – specifies silent mode and suppresses any messages with information about results.

Example

> `xcvault.exe /RemoveKeys`

/Cleanup

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

Syntax

> **xcvault.exe /Cleanup [/S|**

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

Example

```
xcvault.exe /Cleanup
```

2.3.6   **Protecting Keys**

Protecting Keys

After deploying a license key users have access to the key in the software. Admins may prevent users from copying the key by applying a group policy. We have Active Directory Administrative Templates for each application that we produce. The administrative template for **PDF-XChange Editor** is detailed **here,** [78] and it includes an option that prevents users from copying the license key, as detailed below:

Category:	Registration
Policy Name:	Allow Copy Serial Key
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	Specifies whether or not users are permitted to copy serial keys to the clipboard from the Registration pane of the Preferences dialog box.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanCopySerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows users to copy the license key text from the **PDF-XChange Editor.** Set to "0 -Disabled" to prevent keys from being copied.

There is also built-in protection in the form of encryption. When the software applies license keys they are encrypted with a machine-specific seed when they are stored in the **Windows** registry. Copying the registry key from one device to another will fail as the seed for the key will not be available, resulting in both the hash and the license key failing.

2.3.7   **Encrypted Keys, Terminal Servers (RDS) and VDI**

Encrypted Keys, Terminal Servers (RDS) and VDI

License keys are encrypted using a machine-specific seed when they are applied. These seeds are used in a hash to dynamically decrypt the keys when **PDF-XChange** products attempt to validate their license status. Load-balancing RDS farms often run **PDF-XChange** products on different hardware from that used to apply the key, which results in the seed used to encrypt the key being unavailable at run time, the hash failing and the license reverting to "trial mode." A similar issue occurs when deploying VDI or imaged desktops - the seed used to encrypt the key when the master image was made is not available to the deployed instance, which results in the hash failing and the software reverting to "trial mode".

The **XCVault.exe** utility can be used to resolve these issues, as it decrypts the keys on the master instance and before being used to deploy to other hardware. This should be performed on the primary host on application of the license keys in the case of existing server farms, and on the master image (prior to deployment) in the case of VDI and **Sysprep** OS images..

Note
- Existing keys can be decrypted using **XCVault.exe /OpenKeys**
- New keys can be added without encryption using **XCVault.exe /AddKeys /R**. (Information about how to use the **XCVault.exe** utility are available **here.**)

Decrypting an Existing Key

Decrypting a key requires administrative rights, regardless of whether the key is in HKLM or HKCU. Attempting to decrypt a user key without administrative rights will result in an error:
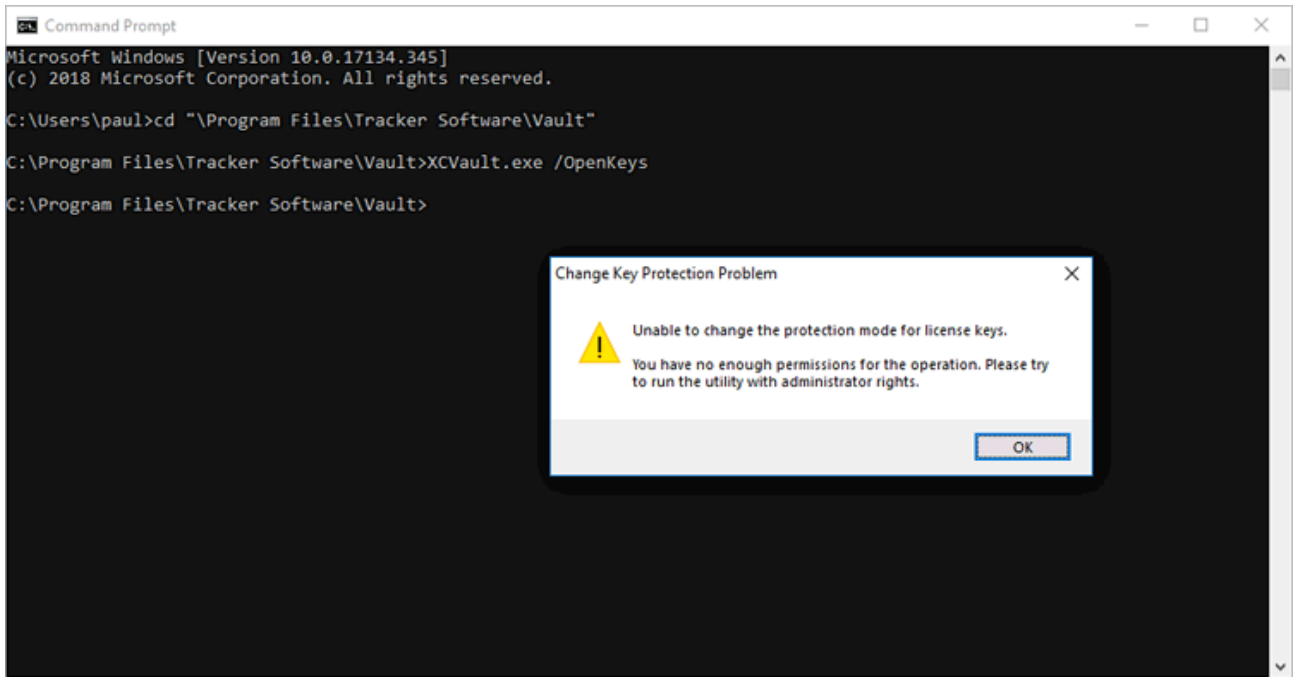
Figure 1. Error Message Displayed When Attempting to Decrypt a User Key without Administrative Privileges

The key will remain encrypted in the user section of the registry:
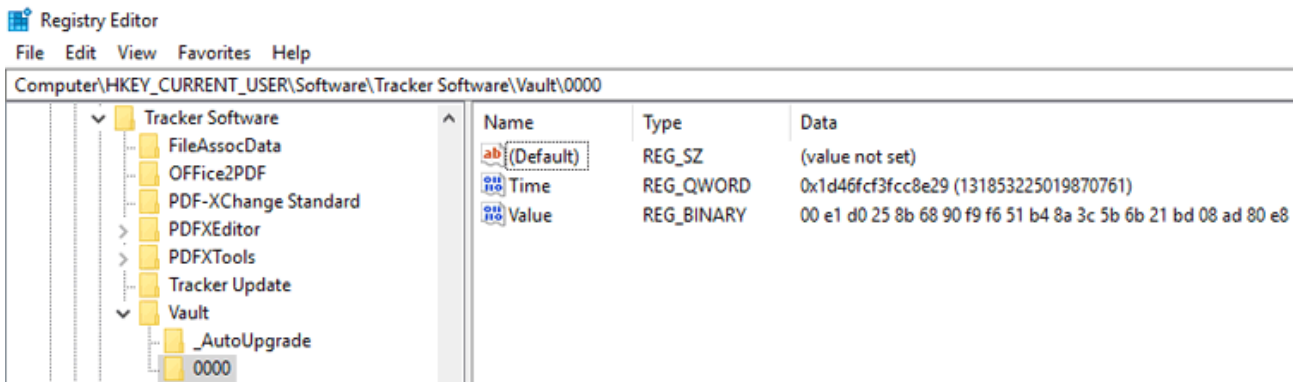
Figure 2. Registry Editor, Encrypted Key

Running the command **"C:\Program Files\Tracker Software\Vault\XCVault.exe" /OpenKeys** from an elevated command prompt will succeed without any error messages:
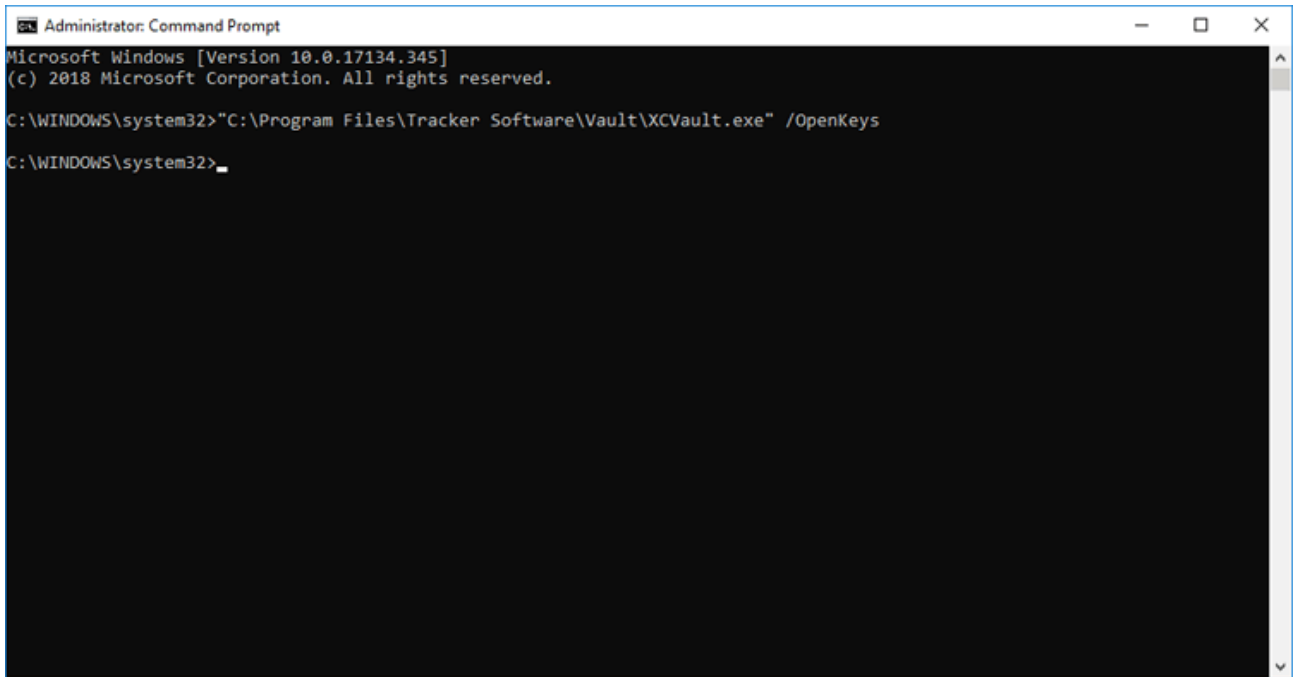
Figure 3. Elevated Command Prompt, /OpenKeys Command Line

All keys in both HKCU and HKLM will be decrypted:
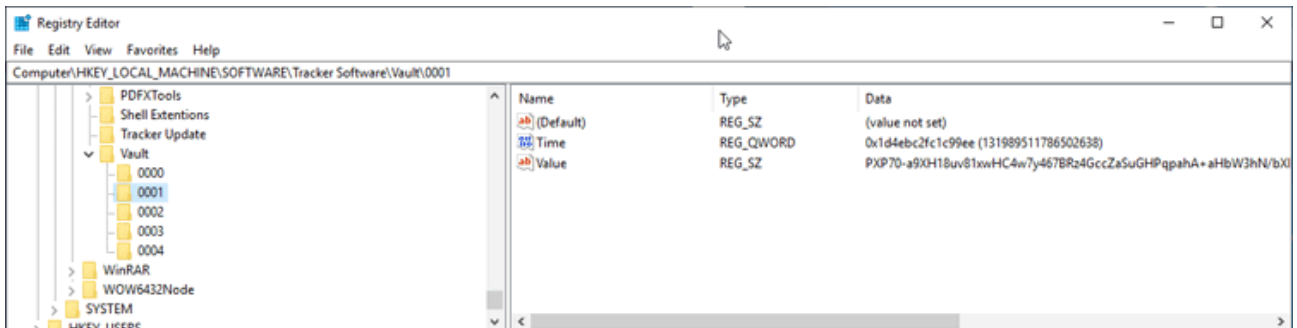
Figure 4. Registry Editor, Decrypted Key

This installation can now be used as a master image for deployment to other hardware.

Adding New Keys without Encryption

As well as decrypting existing keys, **xcvault.exe** can also be used to apply license keys to unlicensed machines, either encrypted (default) or not encrypted. Use the **/S** switch with **/AddKeys** for this to install keys without encryption.

/AddKeys

This command installs all license keys from .xcvault files.

Syntax

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

/M – specifies that new keys are added in the HKEY_LOCAL_MACHINE registry section and administrative rights are required.
/R – specifies that new keys will be unencrypted when added. Please note that this does not affect existing keys.
/S – specifies that the command is not permitted to show error/information messages.

Example

```
xcvault.exe /AddKeys "c:\Personal.xcvault" /M /R /S
```

Will install the key in HKLM, unencrypted, and without messages. (silent)

2.3.8 **Managing License Keys with Active Directory**

Managing License Keys with Active Directory

It is possible to use Active Directory to automatically add and remove **PDF-XChange** license keys based on Security Group membership. You can also use Active Directory to add and remove **PDF-XChange** license keys automatically, based on the security group membership of users.

Note that there is is no Active Directory policy in the templates that is specific for this purpose - one simply uses Active Directory to run a script as required. The script will call the XCVault licensing utility that is installed by default with the software and that is used that to manage keys.

You can set up policies that run a script to apply a key or remove a key when appropriate in order to apply the license based on OU or Security Group membership in Active Directory. One approach is to have different log-on scripts for licensed and unlicensed users. For example, you could set up OUs and groups for **"PDFX Licensed Users"** and **"PDFX Unlicensed Users".** Users in the licensed group could run as follows:

```
@echo off
  reg query "HKEY_CURRENT_USER\SOFTWARE\Tracker Software\Vault" >nul
  if %errorlevel% equ 0 (
    echo "a license key exists- do nothing"
  ) else (
    echo "a license key does not exist - add the key using XCVault"

    "%programfiles%\Tracker Software\Vault\XCVault.exe" /AddKeyData PVP90-hdlpqaGHkHSikhD

    echo "Activate the newly installed key..."
    "%programfiles%\Tracker Software\Vault\XCVault.exe" /ActivateKeys

  )
```

Users in the unlicensed group could run as follows:

```
@echo off
reg query "HKEY_CURRENT_USER\SOFTWARE\Tracker Software\Vault" >nul
if %errorlevel% equ 0 (
  echo "a license key exists- remove it"
  REG DELETE "HKEY_CURRENT_USER\SOFTWARE\Tracker Software\Vault" /F
) else (
```

```
        echo "a license key does not exist - nothing to do here"
    )
```

These processes result in simply adding a key to the user registry in cases where there isn't one already there, and deleting the entire vault reg key when you no longer want them to be licensed.

Note that you can remove keys by deleting the user's entire "vault" registry key, as detailed above, or by using XCVault with either the **/RemoveKeys** or **/Cleanup.** Additionally, you can apply **PDF-XChange Editor's** Active Directory Administrative Template policy to **"Hide All Licensed Features"** from the Editor GUI for the users that will have access to **PDF-XChange Editor** without a license.

2.3.9 **Hide All Licensed Features**

Hide All Licensed Features

Unlicensed users can trial the licensed features in multi-user environments where a mix of both licensed and unlicensed users have access to the software. When unlicensed users use features that require a license, they are notified that the action they are about to take will result in 'demo watermarks' being added to the PDF. These watermarks cannot be removed without a licensed version of the software.

Administrators who deploy **PDF-XChange Editor** in an Active Directory domain can use the **Active Directory Administrative Templates** to apply a policy that removes tools that are not licensed from the user interface, which will remove the possibility of unlicensed users adding demo watermarks to documents through the use of licensed features. Note that licensed users are not affected when this policy is used.

Category:	Toolbars/Menus Options
Policy Name:	Hide All Licensed Features
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Hides all licensed features from toolbars and menus.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.HidePRO
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

2.4 Customizing PDF-XChange Products

Customizing PDF-XChange Products

The **PDF-XChange** products - notably **PDF-XChange Editor** and **PDF-Tools** - contain a wide range of options for customization. The products can be customized during installation via the installation switches or using a transform, and/or after installation via the application UI (note that these changes are stored in the registry and exportable to file). Additionally, settings can be enforced via Group Policy. Although many elements of customization can be performed either before or after installation, both methods have certain advantages over the other:

Customizing before installation has the following advantages:

- The option of licensing on a per-machine basis (but note that license keys passed to an installer can only be for "all users" on a given system).
- The ability to set initial values for the products, such as file associations, mime-types and default printers (but note that **Windows 10** limits an installer's ability to set its associated product as a default product).
- The ability to enable/disable specific product features - it is preferable to install only the desired features rather than install all features and disable the features that are not required.
- Users being free to customize any options that are not enforced.

Customizing after installation has the following advantages:

- The option of licensing on a per-user basis.
- The ability to modify the UI (toolbars and tools).
- The ability to customize the products for groups of users that have common needs.
- Better update management. Note that although it is possible to exclude the **PDF-XChange Updater** during installation, managing it after installation via Group Policy offers greater granularity and control.
- The option of applying security policies (these are not available to installers as they take the form of **Active Directory** Group Policy objects).
- The ability to enforce a user experience via Group Policy.

Settings Storage

The settings for most of the **PDF-XChange** applications (with the exception of some options for **PDF-XChange Printer Standard** and **PDF-XChange Printer Lite)** are stored in memory and, on program close, are written to the **Windows** registry on a per-user basis and organized into sub-keys of:

`HKEY_CURRENT_USER\Software\Tracker Software`

If a user makes a change to the product preferences, customizes the UI or accepts an option from a dialog box, then the changes are saved in memory and written to the **Windows** registry when the application is closed. The best method for importing/exporting settings is for users of **PDF-XChange Editor** and **PDF-Tools** to save their settings to file for subsequent use, as opposed to exporting settings from the **Windows** registry. This is because settings files contain a much wider range of settings, including file history, presets, trusted/untrusted lists for files, attachments and websites, user-specified places such as **Dropbox, One Drive** and **Sharepoint** accounts, custom stamp collections, custom tools and spell-checker learning. Users can load settings files subsequently and on any installation of the software on any machine.

Note that when settings are imported in a settings file, or changed via manipulation of the **Windows** registry, the changes are not permanent and users are free to deviate from them as desired. Therefore this approach is best in cases where the configuration is considered a starting place as opposed to a rigid policy.

Enforcing Customizations

A Group Policy and one of **PDF-XChange's** [Active Directory Administrative Templates](136) can be used in order to enforce settings. Policy settings override user-defined settings and are always used when conflicts arise. Policy settings are located in:

`HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Tracker Software`

Note that the customization that Group Policies can enforce do not cover all customizations available via the UI of the products.

2.4.1   **Customizing the Installation**

Customizing the Installation

The **PDF-XChange** .msi installers take a comprehensive set of arguments that are designed to allow a range of customization during installation. The options available include:

- Licensing options.
- Setting the default values for the products.
- Selecting specific product components.

Options include the standard msiexec.exe switches as defined by **Microsoft,** as well as product-specific choices. Product-specific choices are defined in the Standard Property **ADDLOCAL** and take the form of a list of features, as well as product-specific properties as defined by **PDF-XChange.** The product-specific .msi options are detailed in their respective product pages in the comprehensive online manuals available **here.** Installation options can be specified either at the command line or using an .msi transform file.

Command Line Vs Transform File

Command Line Options

Installation options can be specified directly at the command line.

Pros

- No tools are required - everything can be performed from the command prompt
- Simple to test - just run the command at the command prompt on any **Windows** machine.

Cons

- Can be used only in conjunction with simple sets of options.
- Specifying which features are installed can get complicated. Specifying one feature will change the default behavior in that only the features explicitly called will be installed. Note that if no features are specified then all features are installed.
- Command lines can get complex and very long.

Options in a Transform file

Using a transform file is a cleaner method for the specification of installer options. There are both both advantages and disadvantages to this method in comparison to using command line options:

Pros

- Uses a simplified installation string.
- It is simpler to specify which features are installed. Changing one feature from the default 'install' to 'do not install' does not change the behavior for other features, as is the case if command lines are used.
- The same transform file can be used for installations and updates.
- Easier to use with Group Policy-based installations.

Cons

- Requires special tools.
- A transform file needs to be opened in an appropriate tool and the correct changes identified amongst many choices (as opposed to a command line string, in which every option is visible). This can be challenging for less experienced system administrators.

2.4.1.1   Using a Transform File to Modify an Installer

 Using a Transform File to Modify an Installer

Using a transform file to modify an installer is an effective way to customize an .msi installation without using a command line-based set of options. It is also the best method to use when publishing or assigning software through an **Active Directory** Group Policy (and other similar approaches) that does not allow the use of command line options. Transform files can be used to define the changes required for an .msi installer.

Microsoft provides the tool **Orca.exe** to publish/assign software through an **Active Directory** Group Policy.

- The **MSDN** page on **Orca.exe** is available **here.**
- Instructions on how to use the **Orca** database editor to edit **Windows** installer files, and how to get **Orca** from the **Windows** installer SDK, is available **here.**

Creating a Transform File

This example will detail how to use a transform file to modify the **PDF-XChange Editor** .msi.

1. Open **Orca,** then click the **File** tab and click **Open** in the shortcut menu.

2. Double-click the **PDF-XChange Editor** .msi file. This example will use the **EditorV10.x64.msi** file.

The **EditorV10.x64.msi** file will open in **Orca** and a list of tables will be displayed on the left side:
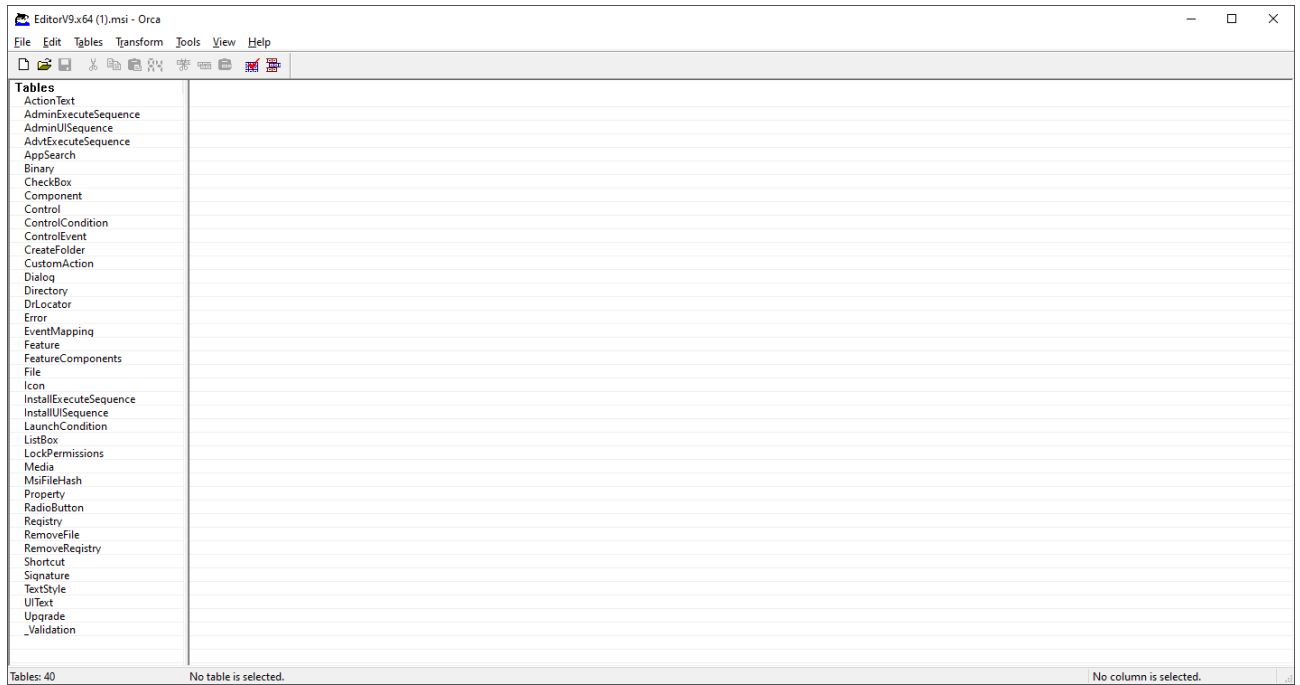
Figure 1. EditorV10.x64.msi File Open in Orca

3. Click the **Transform** tab, then click **New Transform.**

4. Click **Feature** in the list of tables on the left side:
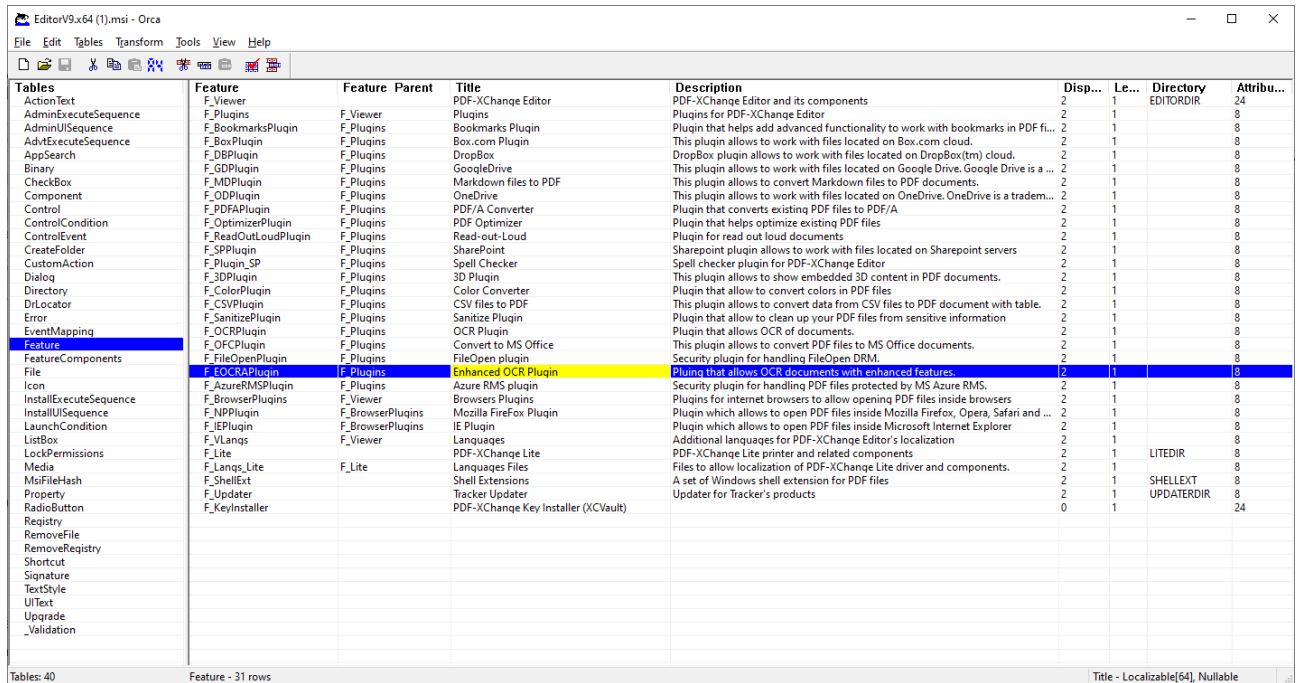
Figure 2. Orca Interface, Feature Table Selected

The features available in the .msi are detailed in the feature table. Features are nested in a parent/child relationship. If a child feature is to be installed then it is necessary for the parent feature to be installed,

in the same manner as command line options. The **Level** value ("Le") determines whether or not features are installed - '1' means install and '0' means do not install. Note that this setup is identical to how the command line arguments used in the installers operate, as detailed **here.** [66] All features are installed by default, as can be seen in **(figure 2).** If you want to disable the installation of a feature, then simply change the **Level** value from '1' to '0'. When the desired features have been enabled/disabled, proceed to the next step:

5. Click the **Property** table in the list of tables on the left side.

The **Property** table is the other table that can be used in order to make changes to the .msi This table lists the default values for properties, and it can be used to change those values and include a license key (as a string or a path to an **XCVault** file). A value of '1' means "true" and a value of '0' means "false". The image below details a modified **Property** table:

Figure 3. Modified Property Table

Changed values are highlighted in the image above:

- **SET_LITE_AS_DEFAULT** is set to true.
- **VIEW_IN_BROWSERS** is set to false.
- **SCHEDULE_UPDATER** is set to false.

When the desired changes have been made, it is necessary to generate a transform file to use in conjunction with the .msi file in order to apply the changes:

6. Click the **Transform** tab, then click **New Transform,** followed by **Generate Transform.**

The **Save Transform As** dialog box will open:
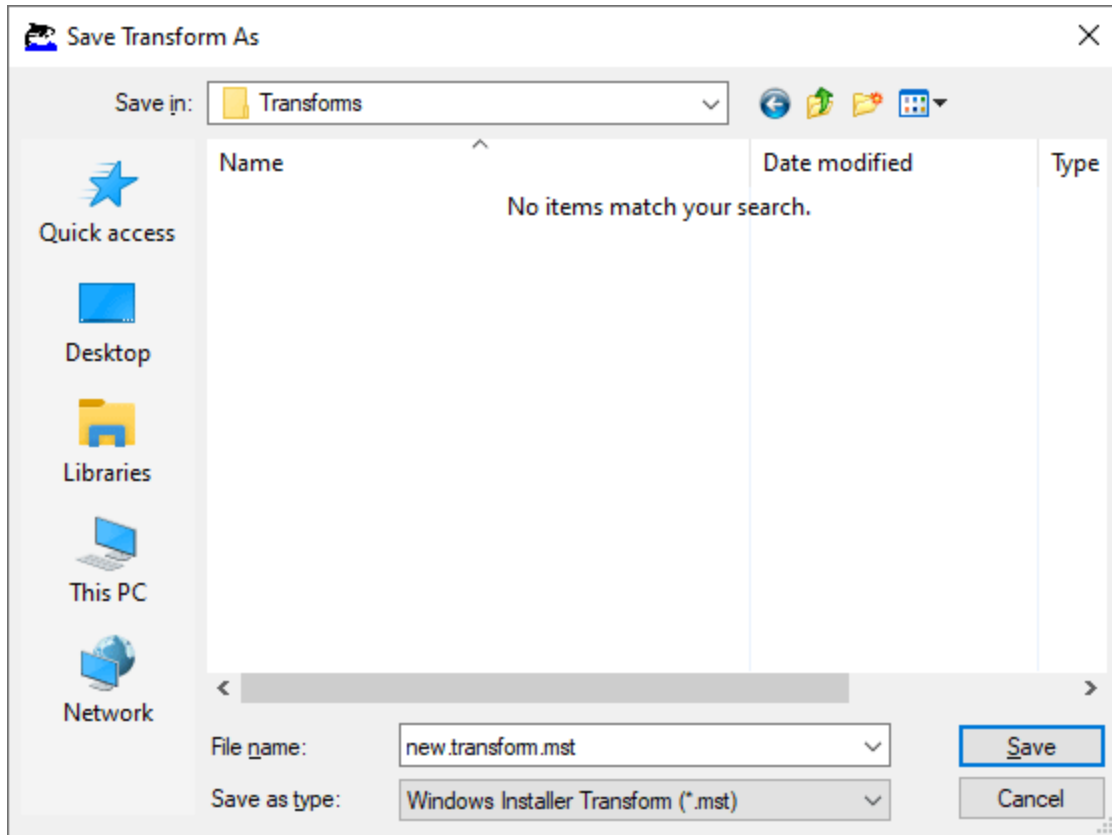
Figure 4. Save Transform As Dialog Box

7. Enter the desired name and click **Save** to save the transform file.

Once a transform file has been created, it can be applied during installation as follows:

```
msiexec /i "\path\to\EditorV10.x64.msi" TRANSFORMS="\path\to\transform.mst"
```

Putting a License Key into an .mst File

A new row must be created in the **Property** table of the .msi when a transform file is used to deploy a product with its license key. Two properties are available for this purpose: **KEYDATA** and **KEYFILE.**
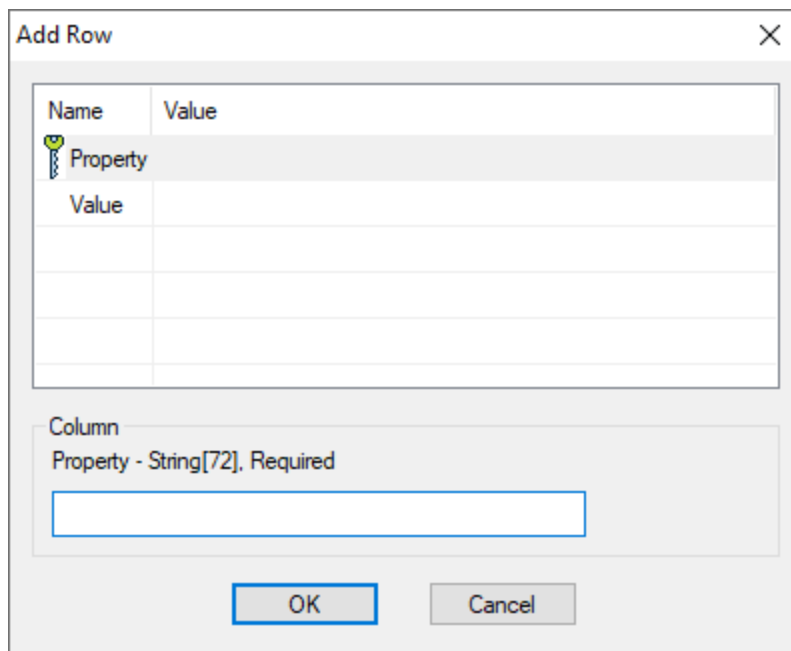
KEYFILE takes the UNC path to the **XCVault** file as its value. This may appear to be a good option, but it results in more issues in comparison to **KEYDATA.** Usually these issues occur as a result of having insufficient privileges to apply the license, as **msiexec.exe** is usually run via a system account and permission settings are often overlooked. One solution to this issue is to grant read-access to the **XCVault** file for all users, but this method has obvious security drawbacks. A much better solution is to use **KEYDATA** instead.

KEYDATA takes the full license key as its value. There are approximately 360 characters in a license key (the exact figure varies from key to key) and the last character is always an '=' symbol. Pasting the key as the value of **KEYDATA** is simple and avoids the permissions issues that affect **KEYFILE.** This method results in significantly fewer issues and should be given preference whenever possible.

<u>Deploying with a License Key and KEYDATA</u>

   1. Open **Orca,** then open the .msi file of the product.

   2. Click the **Transform** tab, then click **New Transform.**

   3. Click the **Property** table in the list of tables on the left side, as detailed above.

   4. Right-click, then click **Add Row** in the shortcut menu (or press Ctrl+R).

The **Add Row** dialog box will open:

Figure 5. Add Row Dialog Box

   5. Enter 'KEYDATA' in the **Property** box, then click to add it to the new row. The **Value** field will then become available.

   6. Paste your key string in the **Value** field and click **OK.** (If you are using **KEYFILE** instead, then enter 'KEYFILE' in the **PROPERTY** field and enter the UNC path to the **XCVault** file in the **VALUE** field).

The **KEYDATA** property will then be added to the transform file:
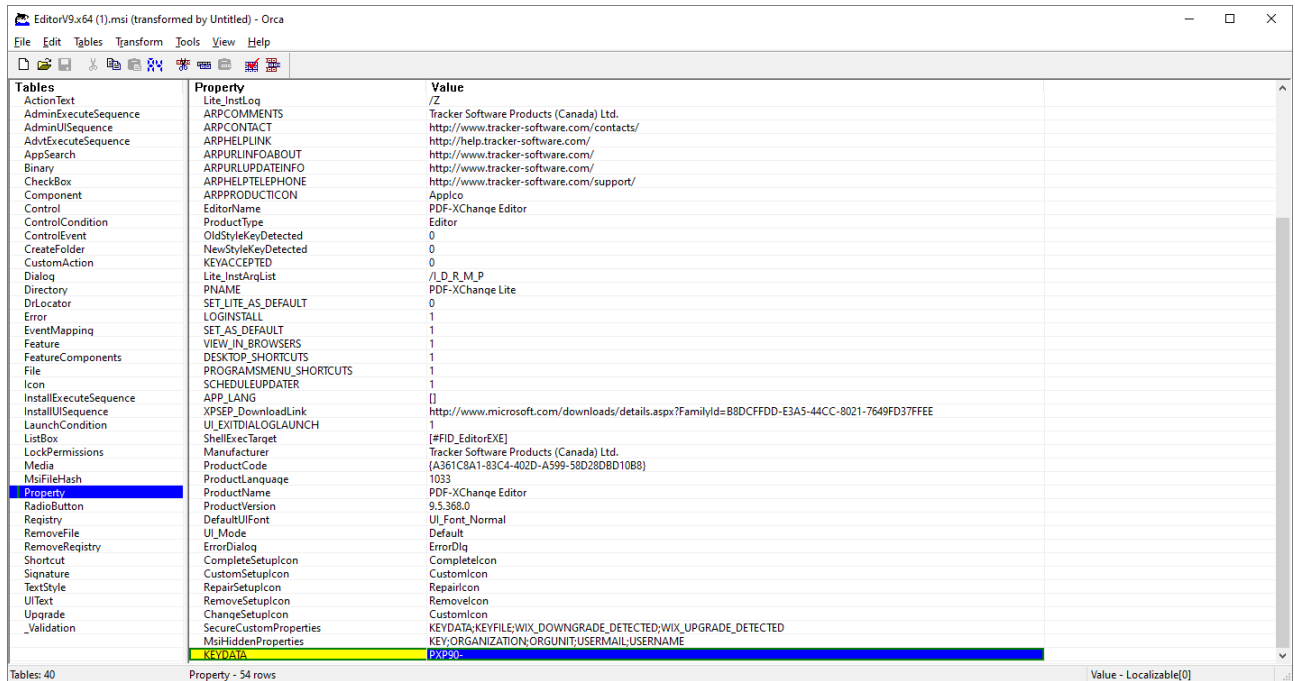
Figure 6. KEYDATA Property Added to Transform File

7. Click the **Transform** tab, then click **Generate Transform.** The **Save Transform As** dialog box will open.

8. Enter the desired name and click **Save** to save the transform file.

If you want to customize which components are installed, then add an **ADDLOCAL** property row with a **Value** field that contains a comma-separated list of the desired components. A comprehensive list of components that can be added via **ADDLOCAL** and a list of other parameters that can be added to the **Property** table is available here:

- **Switches for MSI installers in PDF-XChange Editor**
- **Switches for MSI installers in PDF-XChange Printer Standard**
- **Switches for MSI installers in the PDF-XChange PRO Bundle**

2.4.1.2 Using the Command Line to Modify an Installer

Using the Command Line to Modify an Installer

The basic command line for installation is:

```
msiexec /Option <Required Parameter> [Optional Parameter]
[PROPERTY=PropertyValue]
```

Please note that parameters are case sensitive. A comprehensive list of the various installers, their switches and their options is available in the online manuals:

- [Switches for .msi Installers in PDF-XChange PRO](#)
- [Switches for .msi Installers in PDF-XChange Editor](#)
- [Switches for .msi Installers in PDF-Tools](#)
- [Switches for .msi Installers in PDF-XChange Printer Standard](#)

Using the command line is a convenient way to pass a small number of simple parameters and options. However, it can become large and unwieldy quite easily. For example, the **KEYDATA** property takes the registration key for the software as its argument. These keys contain approximately 360 characters, which makes the installation string long and difficult to read:

```
msiexec /i "C:\Users\username\Downloads\EditorV10.x64.msi" "KEYDATA=PXC70-
abcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzab
cdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcd
efghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdef
ghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefghijklmnopqrstuvwxyzabcdefgh
ijklmnopqrstuvwxyzabcdefghijklmnopqrs="
```

The process of defining features to be installed via the command line can also become complicated. This is because if any feature is defined as an option, then all desired features must be explicitly defined - and there are a large amount of features available. If only a few features are being installed, then this is not likely to be an issue - but in cases where, for example, all features but one are required, then it is necessary to list all the other features in the installation string. This can make installation strings complicated and carries the additional burden of making it more difficult to identify errors. For example, to install all features except the **Google Drive** plugin, the following string is required:

```
msiexec /i "C:\Users\username\Downloads\EditorV10.x64.msi"
ADDLOCAL="F_Viewer,F_Plugins,F_Plugin_SP,F_FileOpenPlugin,F_ReadOutLoudPlugin,F_
OCRPlugin,F_OptimizerPlugin,F_BookmarksPlugin,F_PDFAPlugin,F_SPPlugin,F_GDPlugin
,F_OFCPlugin,F_DBPlugin,F_MD
Plugin,F_BrowserPlugins,F_IEPlugin,F_VLangs,F_Lite,F_Langs_Lite,F_ShellExt,F_Upd
ater,F_KeyInstaller"
```

This means that using the command line to modify an installer is the best choice in simple cases. If you have a more complicated case then a transform file is the best option. The process of using a transform file to modify an installer is detailed **here.** 60

2.4.2   Customizing after Installation

 Customizing after Installation

The user interface of the **PDF-XChange** products contain a range of customization options for both the appearance and the functionality of the applications. These options are determined via the user preferences in the GUI and saved to the **Windows** registry (HKCU) on a per-user basis on program close. The best method for importing/exporting settings is for users of **PDF-XChange Editor** and **PDF-Tools** to save their settings to file for subsequent use, as opposed to exporting settings from the **Windows** registry. This is because settings files contain a much wider range of settings, including file history, presets, trusted/untrusted lists for files, attachments and websites, user-specified places such as **Dropbox, One Drive** and **Sharepoint** accounts, custom stamp collections, custom tools and spell-checker learning. Users can load settings files subsequently and on any installation of the software on any machine.

PDF-XChange Editor can also utilize 'presets' files in order to import presets for tools. Presets are frequently-used variations from the default settings of tools.

Customizations of the **PDF-XChange Printer Standard** print drivers can be saved as profiles and subsequently imported/exported as desired. Further information on profiles for **PDF-XChange Printer Standard** are detailed in the online manual **here.**

PDF-XChange Editor, PDF-Tools, PDF-XChange Printer Standard and the **PDF-XChange Updater** (which is used to update the products) has an associated **Active Directory** administrative template that can be used to create Group Policies in order to enforce behaviors and UI options.

Customization Options

The range of options available for customizing the products present the question of which method is best for the case at hand. The answer to this question depends on the specifics of the situation. The pros and cons of each option are outlined below:

☐ **Settings Files**
   Settings files can be used to quickly apply a complete and customized set up for users. They can also be used to apply the recommended settings whilst giving users the freedom to deviate from those

settings as desired, or they can be set up to load preferences each time the application starts, which provides a familiar starting place for each session.

Settings files are a comprehensive collections of settings and preferences that include:

- File viewing history.
- Feature presets settings.
- Trusted/untrusted lists for files, attachment and websites.
- User-specified places such as **Dropbox, One Drive** and **Sharepoint** accounts from which to open files.
- Custom stamp collections.
- Custom tools.
- Spell-checker learning.
- User choices (responses to prompted questions).

Note that settings files can also be used to backup a custom setup.

⊟ **Presets and Profiles**

Use presets in **PDF-XChange Editor** and profiles in **PDF-XChange Printer Standard** to create and save variations on settings that are frequently used.

PDF-XChange Editor uses preset files to provide quick access to frequently-used settings variations for:

- **Headers and Footers**
- **Bates Numbering**
- **Watermarks**
- **Search Providers**
- **Document Backgrounds**
- **Color Management**
- **Scanner Presets**
- **Converting PDFs to Image Files**
- **Accessibility**
- **Security Profiles**
- **Timestamp Servers used to Authenticate Documents**
- **Appearance Templates for Digital Signatures**
- **Measurements**
- **Comment Style Options**

Presets files are saved as small files in:

```
%appdata%\Tracker Software\PDFXEditor\3.0\Presets
```

PDF-XChange Printer Standard can store user-defined settings in a profile that can be loaded at print time and exported/imported to other devices. All settings that can be modified in the GUI can be saved in a profile:
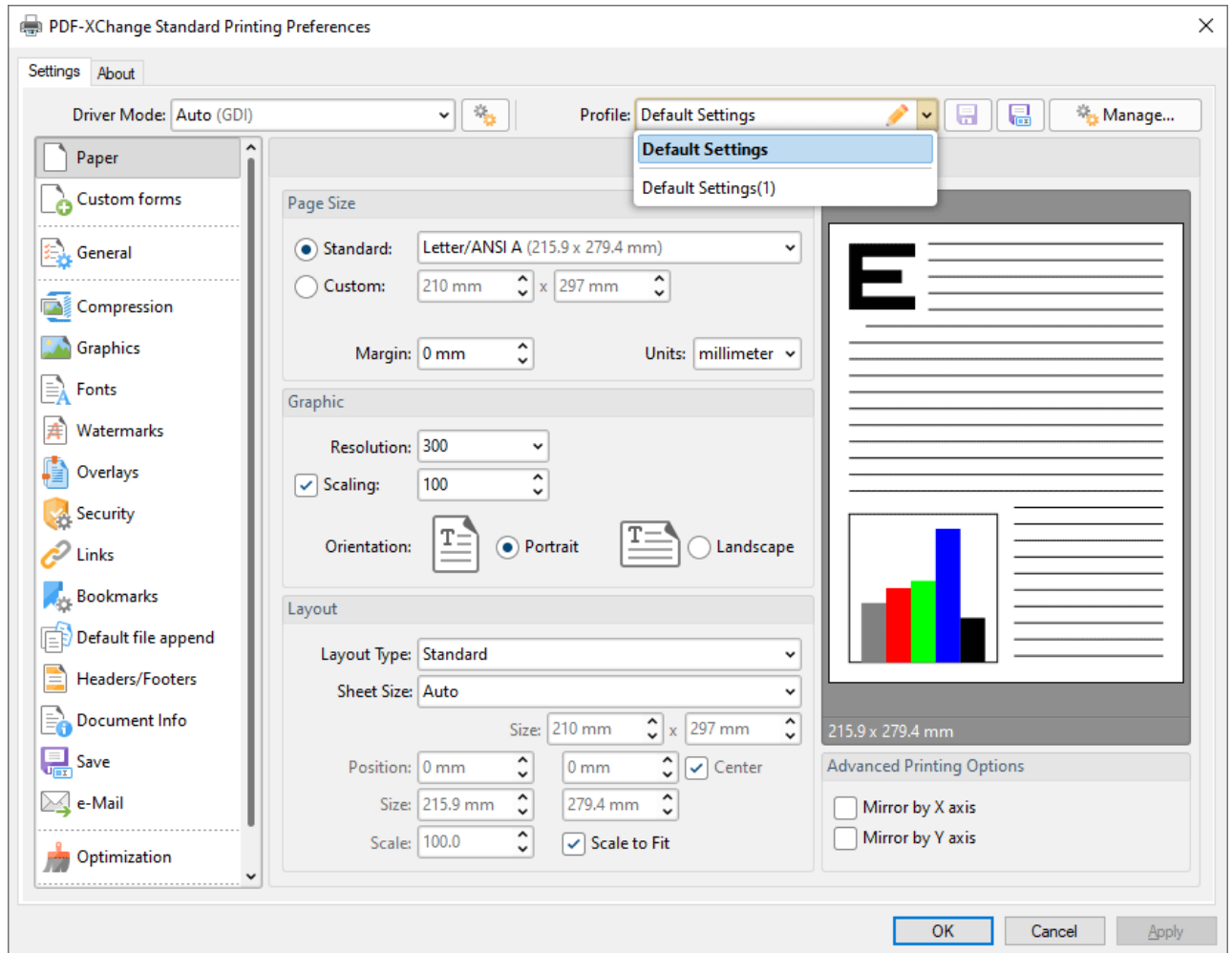
Figure 1. PDF-XChange Printer Standard Printing Preferences GUI, Profiles Dropdown Menu

⊟ Registry Hack

Settings stored in the registry can be applied directly by pushing the appropriate registry key.

If you are using this method then please note:

- It is best limited to small changes.
- It must be performed by the end user.
- Changes made to settings via a registry key are not enforced and users can edit them subsequently.

⊟ Active Directory Administrative Templates

[Administrative templates](#) [78] can be used to enforce options via a Group Policy.

If you are using this method then please note:

- Comprehensive GUI customization is available.
- Security policies can be enforced.
- Users cannot change template policy settings - the associated items will either be inactive or missing from the UI.
- Not all customizations have a matching template policy.

2.4.2.1 Settings Files

![PDF icon] **Settings Files**

A settings file is the most comprehensive way to apply customizations to **PDF-XChange Editor** or **PDF-Tools.**

- Using a settings file means items can be included that cannot be applied easily by other methods.
- Settings files are easy to create and import.
- Settings files can be applied every time **PDF-XChange Editor** or **PDF-Tools** starts by customizing the shortcut to the application, as detailed **here.** [203] (Note that this requires a custom command in **Windows Explorer**).
- Settings files are not enforceable - users can deviate from the settings as desired.

If you want to create a settings files in either **PDF-XChange Editor** or **PDF-Tools,** then simply set up the application as desired in the GUI and use the **Export Settings** feature to export settings to file. This file can then be imported into any instance of the same program and will apply its settings and UI set up, as well as supporting files such as signatures and stamps.

- Further information on settings files in **PDF-XChange Editor** is available **here.** [203]
- The **Export Settings** feature in **PDF-XChange Editor** is detailed **here.**
- The **Export Settings** feature in **PDF-Tools** is detailed **here.**

2.4.2.2   Presets and Profiles

Presets and Profiles

Presets, in the case of **PDF-XChange Editor,** and profiles, in the case of **PDF-XChange Printer Standard,** are used to make predefined settings available to users. Multiple presets/profiles can be applied to the software as desired, which provides users with a range of options in comparison to using a settings file, which provides only a single, predefined state.

Presets and Presets Files

Presets are used in multiple places in **PDF-XChange Editor** where the feature usage lends itself to common variations on a task. User-created presets are stored in the **Windows** registry in the same manner as other settings in **PDF-XChange Editor** and can be managed (modified, cloned, deleted, etc) by users as desired. They can also be exported to file and shared. Presets are available for:

- **Headers and Footers**
- **Bates Numbering**
- **Watermarks**
- **Search Providers**
- **Document Backgrounds**
- **Color Management**
- **Scanner Presets**
- **Converting PDFs to Image Files**
- **Accessibility**
- **Security Profiles**
- **Timestamp Servers Used to Authenticate Documents**
- **Appearance Templates for Digital Signatures**
- **Measurements**
- **Comment Style Options**

If you want to add a preset that users can modify, then use the GUI of **PDF-XChange Editor** to import the preset from file, rather than placing the preset file in %appdata%. The preset will then be stored with the other **PDF-XChange Editor** settings in the registry and can be edited as desired. Click the **File** tab, then click **Manage Settings** and **Export Settings/Import Settings** to export/import settings files:
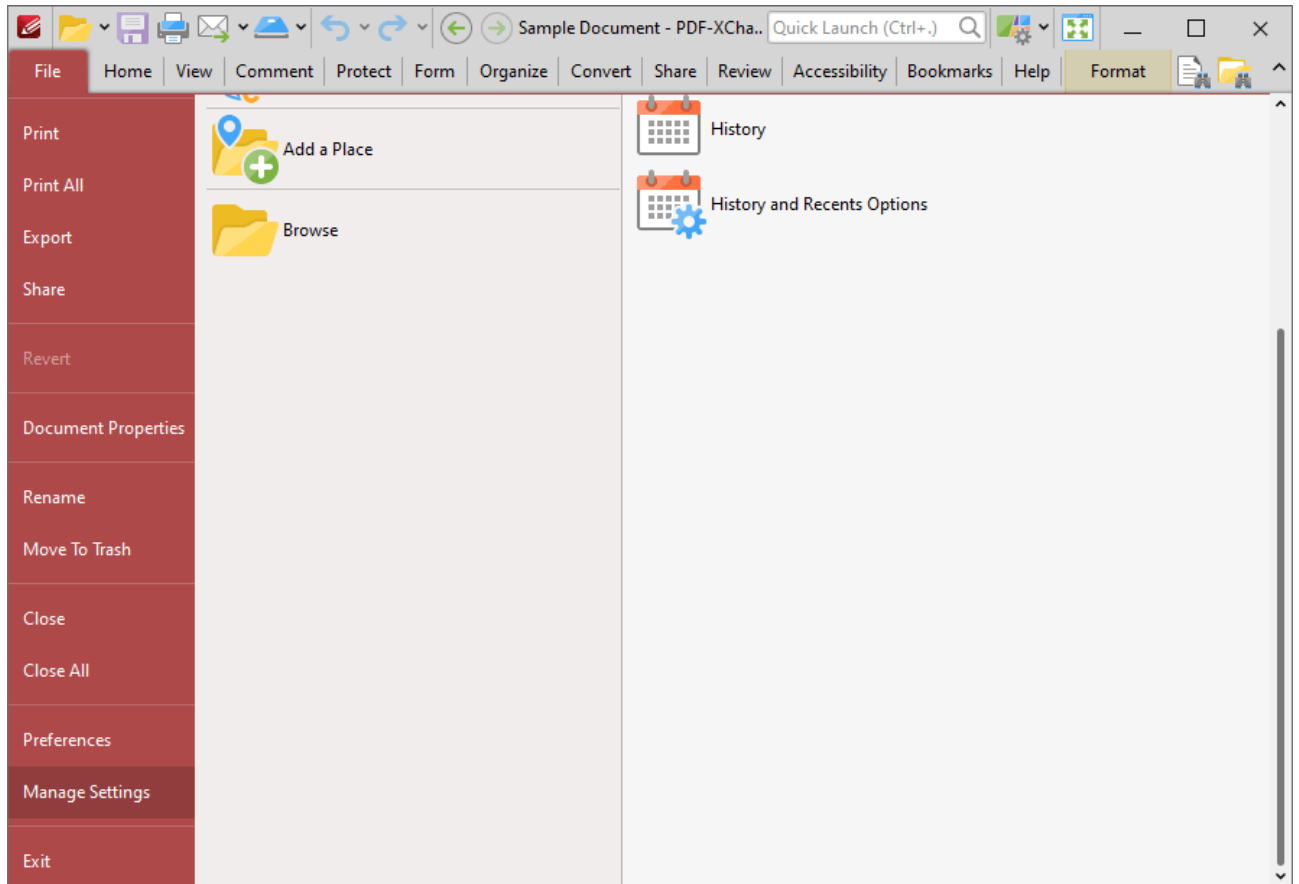
Figure 1. File Tab, Manage Settings Options

If you want to make the preset file available as read-only, meaning that it cannot be modified by users and cannot be deleted as long as it is present, then place it in:

```
C:\Users\<username>\AppData\Roaming\Tracker Software\PDFXEditor\3.0\Presets
```

Creating and Editing Presets

When feature settings can be saved as a preset in **PDF-XChange Editor,** a **Settings** dropdown menu is displayed, for example in the **Add Header and Footer** dialog box:
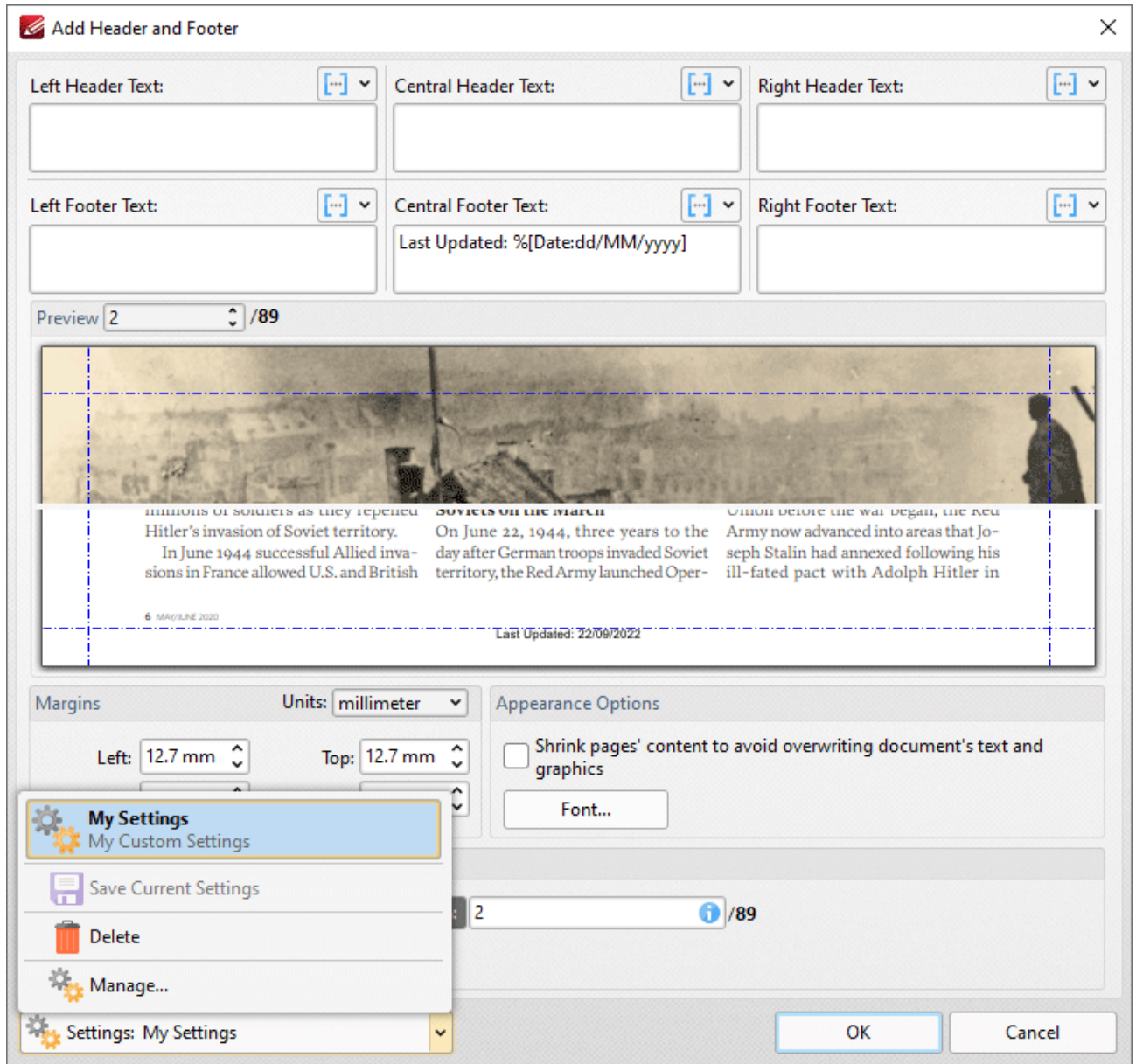
Figure 2. Add Header and Footer Dialog Box, Settings Dropdown Menu

Existing presets are detailed in the dropdown menu.

- Click **Save Current Settings** to create a new preset.
- Click **Manage** to manage existing presets. The **Manage Presets** dialog box will open:
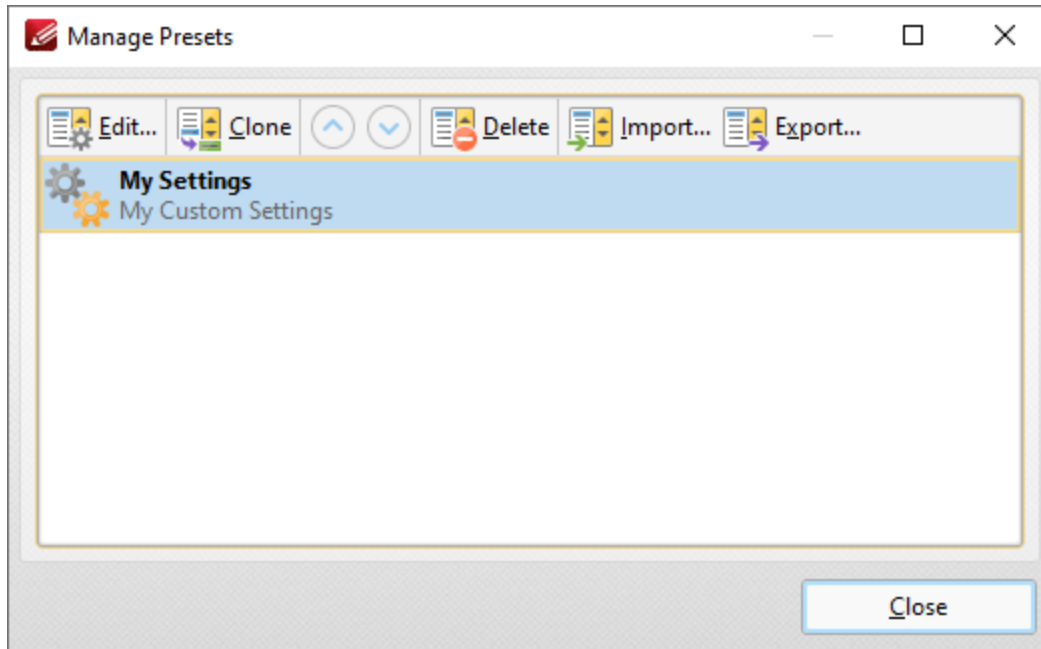
Figure 3. Manage Presets Dialog Box

Use the settings in this dialog box to **Edit, Clone, Delete, Import** or **Export** presets as required.

Profiles

PDF-XChange Printer Standard utilizes profiles that contain user-defined settings. These settings can be saved and subsequently selected from a list. This process enables frequently-used settings to be accessed quickly and avoids the need to set them each time they are used. Profiles are detailed in the online manual for **PDF-XChange Printer Standard here.**

2.4.2.3   Registry Hacks

Registry Hacks

The settings of **PDF-XChange Editor** can be pushed via registry keys. Please note that this is not recommended for applying license keys as licenses should be encrypted with a machine-specific seed. Details on how to apply keys after installation are available **here.** 32

Per-user settings are stored in memory and written to the user's HKCU section of the registry when the application closes, as detailed **here.** 56 This means that it is possible to push settings by applying registry keys. However, it is recommended to use **Settings Files** 72 **Presets and Profiles** 73 or the **PDF-XChange Active Directory** Administrative Templates instead. Note that changes made by modifying the **Windows** registry are usually not enforced, and users are therefore free to change the settings via the application preferences in the GUI at any time.

If you want to identify the associated registry entry of a specific setting, then apply the setting in the application GUI, close the program (in order to force it to write the setting to the registry) then look for changes in:

`HKEY_CURRENT_USER\Software\Tracker Software`

Export the altered key and then push it as desired.

2.4.2.4 **Active Directory Administrative Templates**

Active Directory Administrative Templates

Active Directory administrative templates are available for **PDF-XChange Editor,** [136] **PDF-Tools** [299] , **PDF-XChange Printer Standard** [231] , the **XCVault Utility,** [32] and the **PDF-XChange Updater.** [359]

The majority of custom settings can be enforced via the policies in the **Active Directory** administrative template, and new settings are added on an ongoing basis. The most important difference between setting a policy via an **Active Directory** administrative template and pushing settings using registry keys is that policy-based settings always take precedence over pushed registry keys (as well as settings imported via a settings file). Users cannot change policy-based settings.

The **PDF-XChange Active Directory** administrative templates are applied in the same manner as any other **Active Directory** administrative template - i.e. the template files must be placed in the appropriate machine-local or domain-based GPO. The **PDF-XChange** products use (.admx) and (.adml) template files in conjunction with **Windows Vista/Server 2008** and later. Further information on managing (.admx) files, including step-by-step instructions, is available **here.**

A zip archive of all current templates is available **here.**

Local Machine-Based Templates

The **PDF-XChange Active Directory** administrative templates policies are available locally through the **Local Group Policy Editor:**
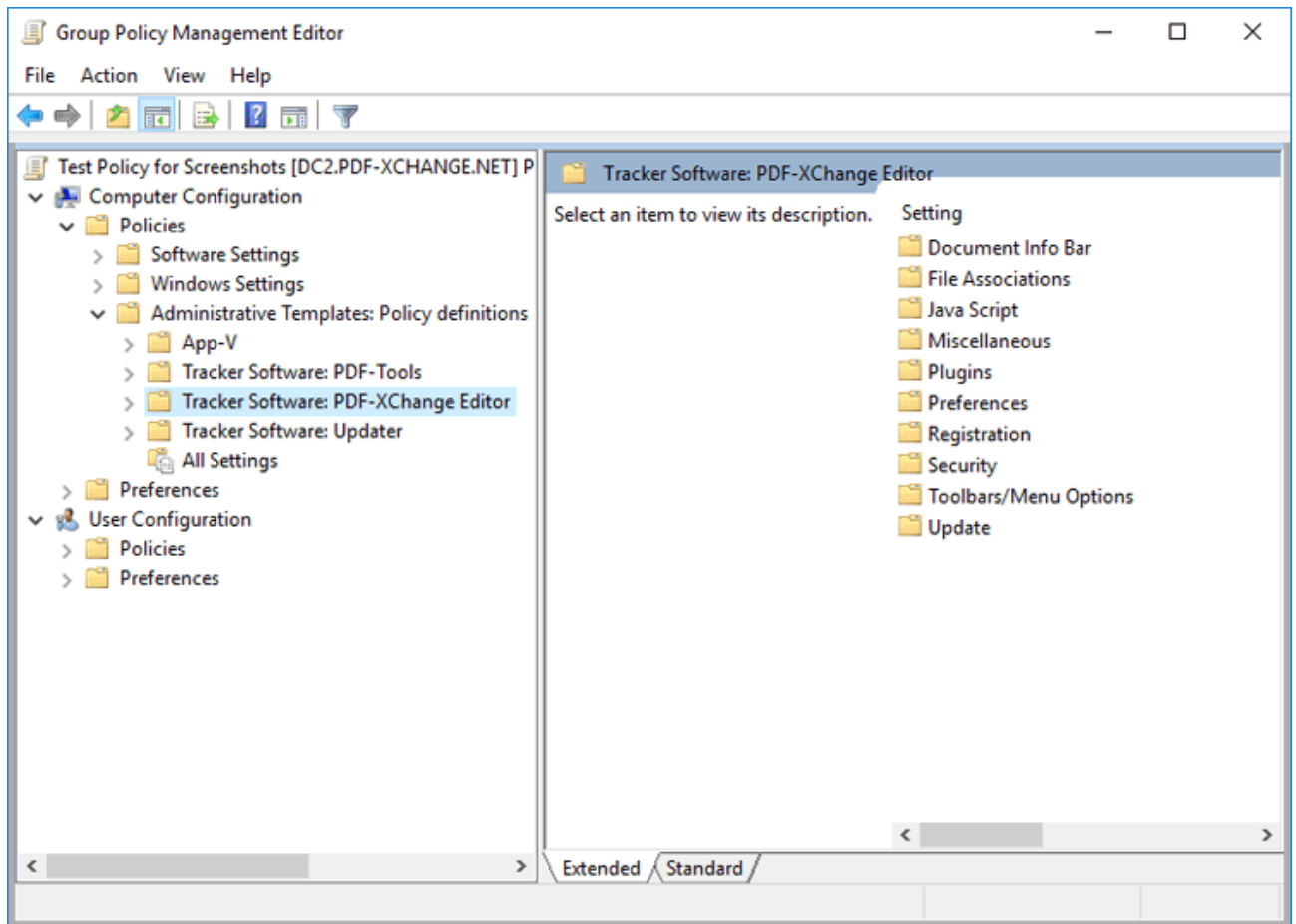
Figure 1. Local Group Policy Editor, PDF-Tools Administrative Template Policies

If you want to make the **PDF-XChange Active Directory** administrative template Group Policies available on a single computer via the **Local Group Policy Editor,** then place the files in the following locations on the target PC:

> language neutral file (.admx): **%systemroot%\policyDefinitions**
> language specific file (.adml): **%systemroot%\policyDefinitions\[MUIculture]** (for example, the U.S. English .admx language specific file will be stored in:
>
> **%systemroot%\policyDefinitions\en-us)**

Domain-Based Templates

If you want to make the **PDF-XChange** administrative templates available across a domain then they must be placed in the domain controller's central store:
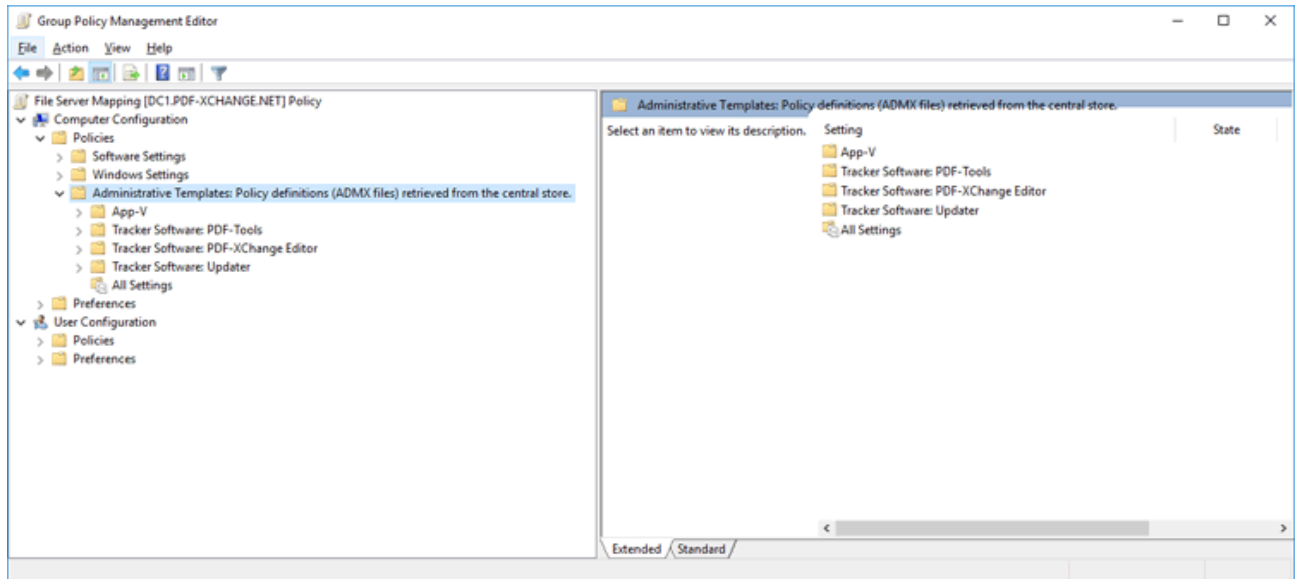
Figure 2. Group Policy Management Editor, Administrator's Central Store

Place the template files in the following locations on your domain controller in order to do this:

.admx language neutral (.admx): **%systemroot%\sysvol\domain\policies\PolicyDefinitions**
.admx language specific (.adml): **%systemroot%
\sysvol\domain\policies\PolicyDefinitions\[MUIculture]** (for example, the U.S. English .admx
language-specific file will be stored in:

%systemroot%\sysvol\domain\policies\PolicyDefinitions\en-us)

Further information on how to set up a domain controller to use the **PDF-XChange Active Directory**
administrative templates is available **here.**

3　　　**PDF-XChange Editor**

 PDF-XChange Editor

This section of the manual contains information on the **Installation, Updating** and **Customization** of **PDF-XChange Editor:**

- **I** 83 **nstallation** 83
- **Updating** 109
- **Customization** 120

Please note that this section of the manual covers the installation of **PDF-XChange Editor** using the discrete **PDF-XChange Editor** installers. **PDF-XChange Editor** can also be installed as part of the other products **PDF-XChange PRO** and **PDF-XChange Tools.** If you are installing **PDF-XChange Editor** as part of one these products then please see the links below:

- **PDF-XChange PRO** 321
- **PDF-Tools** 258

A comprehensive list of the **PDF-XChange Editor** installation switches are available in the online manual.

- Installation switches for the **PDF-XChange Editor** .msi installers are detailed **here.**
- Installation switches for the **PDF-XChange Editor** .exe installers are detailed **here.** (Note that the .exe installers are not recommended for managed installations - see **here** 12 for further information).

3.1 Deployment Planning

Deployment Planning

PDF-XChange Editor is available for installation via its own stand-alone product installer or as a component in either the **PDF-XChange PRO** or **PDF-Tools** installers. Note that the virtual printer **PDF-XChange Printer Lite** is included when **PDF-XChange Editor** is purchased and it will be installed by default when **PDF-XChange Editor** is installed. It is important to consider the following factors before the installation of **PDF-XChange Editor:**

- Are you going to install **PDF-XChange Editor** via its own stand-alone product installer, or as a component of a **PDF-XChange PRO** or **PDF-Tools** installer? Further information on which installer you should use is available **here.** [83]
- Do you want to customize which plugins are installed with the application?
- Do you want **PDF-XChange Editor** to be set as the default application for viewing/editing PDF files?
- Do you want to change the name of the printer installed from the default name of **"PDF-XChange Printer Lite"?**
- Do you want the printer installed to be set as the default system printer?
- Do you want to change the language of the user interface from the default setting (US English)?
- Do you want to set **PDF-XChange Editor** to open PDF files located in internet browsers?
- Do you want to install the software updater and create a schedule for updating?

You can use the .msi installation switches detailed **here** to determine these options.

3.2 Installation

Installation

PDF-XChange produce multiple installers that include **PDF-XChange Editor**. The product that you purchase dictates which installer should be used. A product/component matrix is available **here.** [8]

The **PDF-XChange Editor** component is included in the following product installers:

- **PDF-XChange Editor** - the stand-alone **PDF-XChange Editor** application. Note that a license for this product includes a free license for the **PDF-XChange Printer Lite** virtual printer, which will also install when **PDF-XChange Editor** is installed.
- **PDF-Tools.** A license for **PDF-Tools** includes a license for **PDF-XChange Editor,** which will also install when **PDF-Tools** is installed.
- **PDF-XChange PRO.** A license for **PDF-XChange PRO** includes a license for **PDF-XChange Editor,** which will install when **PDF-XChange PRO** is installed.

This section of the manual covers the **PDF-XChange Editor** installers and their options and best practices. If you are installing **PDF-XChange Editor** via **PDF-Tools** or **PDF-XChange PRO** then please refer to those sections of the manual, which are available **here** [258] and **here** [321] respectively. Installers for **PDF-XChange Editor** are available as either an .exe or .msi installer. Further information on the merits of each format is available **here.** [12] Note that although .exe installers are available for **PDF-XChange Editor,** they are designed for single-user installations and do not utilize options or switches. This guide is intended for use with managed installations and therefore will refer only to the .msi installers. The .exe installers for **PDF-XChange Editor** are not recommended for use in a managed network environment. See **here** [12] for further information on the pros and cons of the .msi and .exe-based installers for all products.

Discrete installers for the current version of **PDF-XChange Editor** are always available at:

https://pdf-xchange.com/EditorV10.x64.msi
https://pdf-xchange.com/EditorV10.x86.msi

The installation of a product using an .msi is achieved by passing the .msi file as a parameter (along with the desired options) to the system executable **msiexec.exe** using standard **Microsoft Syntax.** Please note the following:

- If no options are specified then the default options will be used.
- If no features are specified then all features will be installed.
- The full UNC paths to the .msi installer and any supporting files should be used.
- Product features are specified using the **ADDLOCAL** standard .msi property.
- Product properties are specified using the **Product Specific Properties.**

A comprehensive list of the **PDF-XChange Editor** installer switches and their options is available **here.**

The standard options that the **PDF-XChange Editor** .msi installers use enable a consistent installation experience over a range of deployment methods. The switches and options remain the same whether they are assigned/published via **GPO, SCCM** or through third-party deployment tools. They are always applied via command line switches or through the modification of the .msi - either directly or using a transform file.

3.2.1   **Installation Examples**

Installation Examples

The **PDF-XChange Editor** installers contain a number of customizable options. This section details two of the most common setups:

- **Installing with Default Settings** 86
- **Installing without Changing File Associations** 88

3.2.1.1   Installing with Default Settings

Installing with Default Settings

Running the **PDF-XChange Editor** .msi installers without passing any options or parameters will result in a default installation, which includes:

- The installation of all features.
- The installation of all plugins (detailed below).
- The installation of shell extensions.
- The installation of all available UI languages.
- The **PDF-XChange Printer Lite** printer.
- The **PDF-XChange Updater.**

 List of Available Plugins

- **F_Plugin_SP** – the spell-checker plugin. (This requires **F_Plugins**).
- **F_FileOpenPlugin** – the security plugin that handles FileOpen DRM. (This requires **F_Plugins**).
- **F_ReadOutLoudPlugin** – the plugin that provides read-out-loud functionality. (This requires **F_Plugins**).
- **F_OCRPlugin** – facilitates the use of the default OCR features. (This requires **F_Plugins**).
- **F_OptimizerPlugin** – the plugin that optimizes PDF files. (This requires **F_Plugins**).
- **F_BookmarksPlugin** – the plugin that facilitates the inclusion of advanced functionality for bookmarks. (This requires **F_Plugins**).
- **F_PDFAPlugin** – the plugin that converts PDF files into PDF/A format. (This requires **F_Plugins**).
- **F_SPPlugin** – the plugin that allows the software to work with files located on Sharepoint™/Office 365™ servers. (This requires **F_Plugins**).
- **F_GDPlugin** – the plugin that allows the software to work with files located on Google Drive™ cloud storage. (This requires **F_Plugins**).
- **F_OFCPlugin** – the plugin that allows the conversion of documents into **MS Office** formats. (This requires **F_Plugins**).
- **F_IdentifyFormsPlugin** - the plugin that enables the detection and creation of form fields in documents converted to PDF. (This requires **F_Plugins**).
- **F_DBPlugin** – the plugin that enables the software to work in conjunction with files located on the Dropbox™ cloud. (This requires **F_Plugins**).

- **F_EOCRAPlugin** – facilitates the use of the enhanced OCR features. (This requires **F_Plugins**).
- **F_AzureRMSPlugin** - the plugin for handling PDF files protected by **MS Azure RMS.** (This requires **F_Plugins**).
- **F_MDPlugin** – the plugin that enables the conversion of Markdown files into PDF documents. (This requires **F_Plugins**).
- **F_ODPlugin** – the plugin that enables working with files located on **Microsoft OneDrive.** (This requires **F_Plugins**).
- **F_BoxPlugin** – the plugin that enables working with files located on **Box.com.** (This requires **F_Plugins**).
- **F_3DPlugin** – the plugin that enables the viewing of embedded 3D content in PDF documents. (This requires **F_Plugins**).
- **F_ColorPlugin** – the plugin that enables the conversion of colors in PDF documents. (This requires **F_Plugins**).
- **F_CSVPlugin** – the plugin that enables the conversion of .csv files to tables in PDF documents. (This requires **F_Plugins**).
- **F_SanitizePlugin** – the plugin that enables the sanitization of documents. (This requires **F_Plugins**).

Note that when a default installation is used, **PDF-XChange Editor** is set as the default application for local files (and by extension .pdf files), web-based files (by mime-type) and license keys are not installed.

If you want to install **PDF-XChange Editor** with default settings, then call the installer from the command line without any options:

```
msiexec.exe /i \\UNC\path\to\EditorV10.x64.msi
```

Note that a transform file is not required to install **PDF-XChange Editor** with default settings.

3.2.1.2 **Installing without Changing File Associations**

 Installing without Changing File Associations

PDF-XChange Editor is set as the default application for PDF files (by file extension association and mime-type) when the default installation is used. If you want to prevent this from happening and/or disable other default settings, then use either of the methods detailed below.

At the Command Line

The following command lines can be used to disable default settings:

- **SET_AS_DEFAULT="0"** - disables **PDF-XChange Editor** from being set as the default application for PDF files.
- **VIEW_IN_BROWSERS="0"** - disables **PDF-XChange Editor** from being set as the default application for opening PDF files in browsers.
- **SET_LITE_AS_DEFAULT="0"** - disables **PDF-XChange Printer Lite** from being set as the default system printer.

Example

```
msixec.exe /i \\UNC\path\to\EditorV10.x64.msi SET_AS_DEFAULT="0"
VIEW_IN_BROWSER="0" SET_LITE_AS_DEFAULT="0"
```

This command line will install **PDF-XChange Editor** on a 64-bit system with all features, no license and will not change any defaults for file associations, mime types or the default printer.

Using a Transform File

Figure 1. Orca Interface, PDF-XChange Editor .msi Property Table, SET_AS_DEFAULT Highlighted

During installation, .pdf file associations making **PDF-XChange Editor** the default application can be set in HKLM and all users *without existing .pdf associations* will get **PDF-XChange Editor** as the default for .pdf files on first run. However, the file association for users *with an existing .pdf file association* will not be changed, and consequently will not necessarily default to **PDF-XChange Editor.** Therefore it is important to note that the default defined in an installation *may not be applied to all users*.

If you are using **Orca** and a transform file, then change the value of **SET_AS_DEFAULT** and **VIEW_IN_BROWSERS** from 1 to 0:

Figure 2. Orca Interface, PDF-XChange Editor .msi Property Table, VIEW_IN_BROWSERS and SET_AS_DEFAULT Set to Zero

Instructions on how to use **Orca** to create transform files for your deployment are available **here.**

3.2.2 **Switches for MSI Installers**

Switches for MSI Installers

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

If you are using an older version of the software then please refer to the relevant user manual as the available switches may be different. All user manuals are detailed **here.**

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

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

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

Syntax

<Product.msi>

/j<u|m>

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

Syntax

<Product.msi>

Parameters

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

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

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

Display Options

/quiet

This switch installs the application without user interaction.

/passive

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

/q[n|b|r|f]

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

Restart Options

/norestart

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

/promptrestart

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

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

a - start up of actions.

c - initial UI parameters.

e - all error messages.

i - status messages.

m - out of memory or fatal exit information.

o - out of disk space messages.

p - terminal properties.

r - action-specific records.

u - user requests.

v - verbose output.

w - nonfatal warnings.

x - extra debugging information.

+ - append to existing file.

! - flush each line to the log.

* - log all information except for verbose output and extra debugging information.

/log

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

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

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

Modifiers

a - forces the reinstallation of all files.

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

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

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

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

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

p - only if a file is missing.

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

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

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

Standard Properties

ADDLOCAL

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

Syntax

ADDLOCAL=<list of features>

Features

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

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

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

Product Specific Properties

INSTALLLOCATION

This property specifies the installation folder.

Syntax

INSTALLLOCATION=<installation folder>

SET_AS_DEFAULT

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

Syntax

SET_AS_DEFAULT="0"

PNAME

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

Syntax

PNAME=<printer name>

SET_LITE_AS_DEFAULT

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

Syntax

SET_LITE_AS_DEFAULT="0"

VIEW_IN_BROWSERS

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

Syntax

VIEW_IN_BROWSERS ="0"

DESKTOP_SHORTCUTS

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

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

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

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

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

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

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

Syntax

APP_LANG=<id>

NOUPDATER

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

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

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

Syntax

SCHEDULEUPDATER=<0>

<div align="center">

MSI Installer Examples

</div>

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

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

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

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

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

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

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

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

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

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

3.2.3   **Switches for EXE Installers**

Switches for EXE Installers

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

The command line for installation is: **PDFXVE9.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

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

Install Options

/install

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

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

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

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

/quiet

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

/passive

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

Restart Options

/norestart

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

Logging Options

/log

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

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

SET_AS_DEFAULT

If this property is not specified, or is specified with a value of "1", then **PDF-XChange Editor** will be set as the default application for viewing PDF files.

Syntax

SET_AS_DEFAULT="0"

VIEW_IN_BROWSERS

If this property is not specified, or is specified with a value of "1", **PDF-XChange Editor** will be configured to open PDF files within browsers.

Syntax

VIEW_IN_BROWSERS="0"

APP_LANG

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

Syntax

APP_LANG=<id>

DESKTOP_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

NOUPDATER

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

Syntax

NOUPDATER="0"

EXE Installer Examples

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

  ```
  PDFXVE9.exe /quiet
  ```

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

  ```
  PDFXVE9.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYFILE="C:
  \license\V10Pro.xcvault"
  ```

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

  ```
  PDFXVE9.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYDATA="PVP60
  - ZJ2J77DN5kdBuQRhj ... dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

3.3   Updating

Updating

PDF-XChange Editor utilizes the **PDF-XChange Updater** to check for and download updates. The default behaviour is to allow users to check for and install updates (as long as the security permissions allow them to do so).

PDF-XChange recommends the use of the **PDF-XChange Updater** Group Policy from the synonymous administrative template for the purposes of managing the update process. This will prevent users from upgrading separately, which would result in a mixture of versions across your enterprise.

The **PDF-XChange Updater** 350 installs by default when **PDF-XChange Editor** is installed and creates a task in the **Windows** task scheduler called **TrackerAutoUpdate.** This task launches the command **"C:\Program Files\Tracker Software\Update\TrackerUpdate.exe" -CheckUpdate** to check for updates once every 14 days.

The **Windows Task Scheduler** can be used to adjust the settings of the **PDF-XChange Updater.** If you want to adjust the settings of the updater, then open the **Windows Task Scheduler,** click the **TrackerAutoUpdate** task and adjust settings as desired:
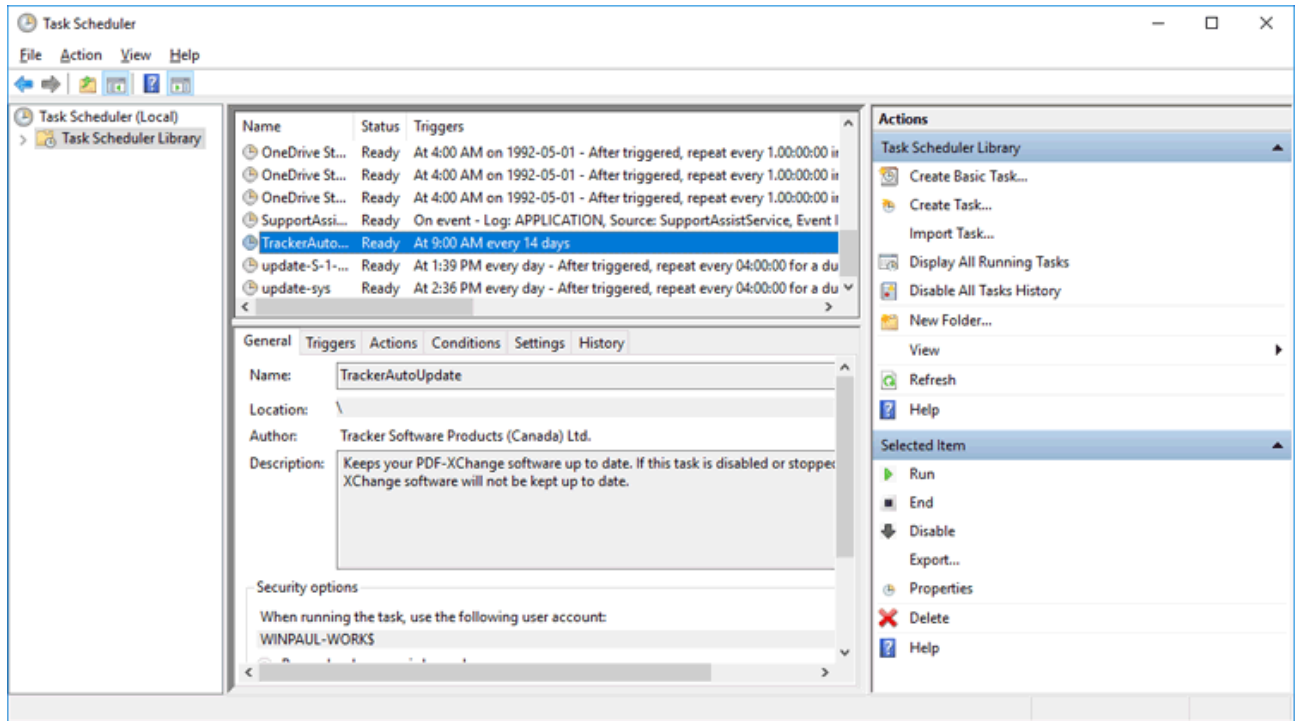
Figure 1. Task Scheduler, TrackerAutoUpdate Options

3.3.1 **Domain-Managed Updates**

Domain-Managed Updates

The **PDF-XChange Updater** runs locally on all machines and is enabled by default, which means all users can update their software themselves when a new version becomes available. Note that updates are always a complete product installer, and the process of updating always means the entire software package must be reinstalled, as **PDF-XChange** does not offer patches or other methods of modifying existing installations. It is not necessary to uninstall existing applications when updates are installed, as the update will replace the existing installation (and preserve customized settings, file history and other similar parameters).

Managed Updates

There are two **Active Directory** administrative templates that relate to updates for **PDF-XChange Editor:**

Tracker Software: PDF-XChange Editor

This template disables the check for updates function in **PDF-XChange Editor's** UI:
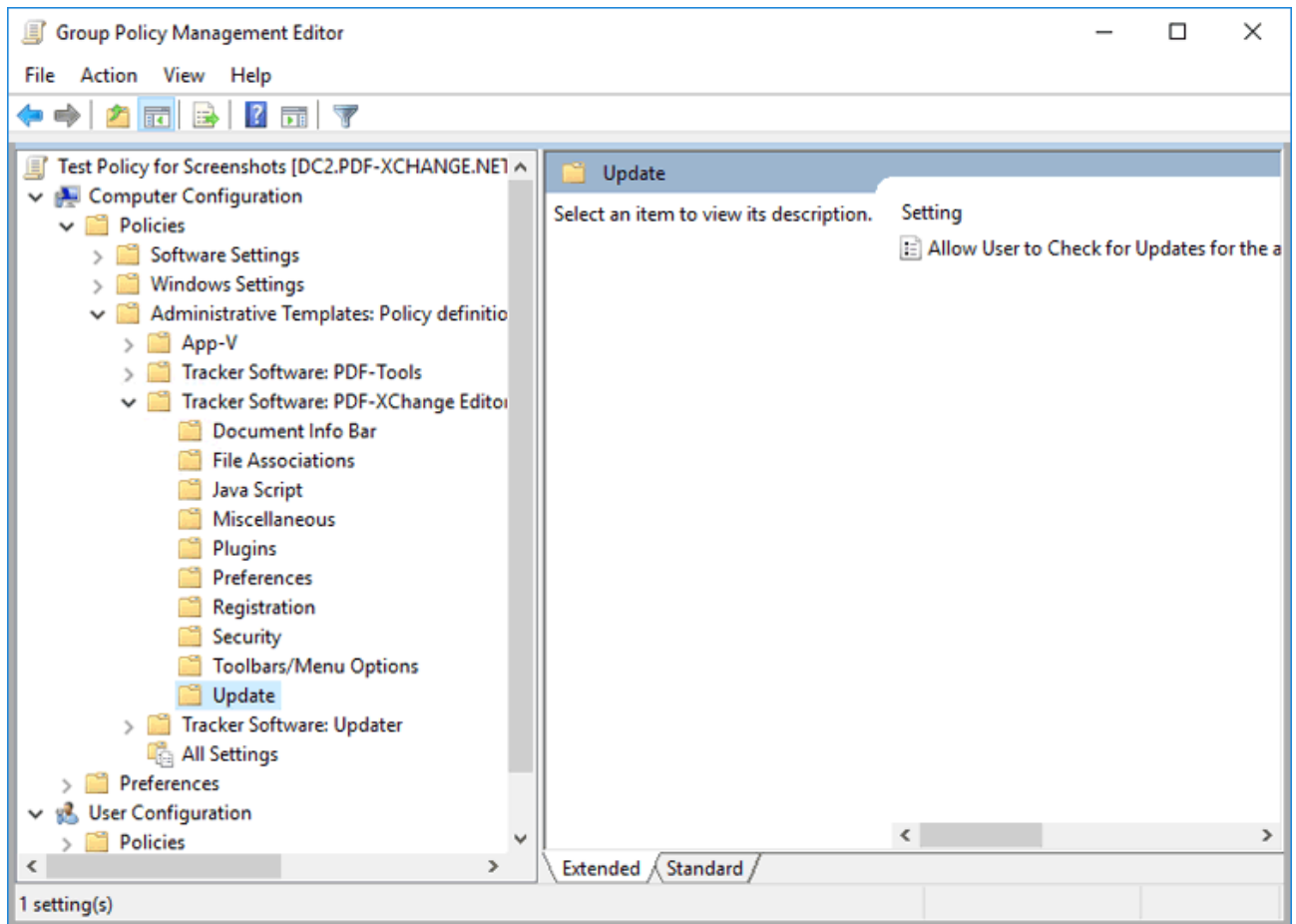
Figure 1. Group Policy Management Editor, PDF-XChange Editor Administrative Template, Update Policy

Please note that the **Tracker Updater Administrative Template** policy detailed <u>here</u> 360 may override this policy. If there is a conflict between update policies then the policy that disables updates will be given priority. For example, if updates are enabled in the **PDF-XChange Editor** policy but disabled in the **Tracker Updater** policy, then updates will not be enabled. Or, if updates are enabled in the **Tracker Updater** policy but disabled in the **PDF-XChange Editor** policy, then updates will not be enabled in **PDF-XChange Editor.**

Tracker Software: Updater

This template can be used to enable/disable all of the **PDF-XChange** product updates:

Figure 2. Group Policy Management Editor, PDF-XChange Editor Administrative Template, General Policy

We recommend disabling the **Tracker Updater** on user devices and pushing updates as complete product packages across your enterprise in order to ensure that the same version of the software is maintained on all systems.

3.3.2 **User-Managed Updates**

 User-Managed Updates

Unless this command is disabled via **Active Directory**, users can click **Check for Updates** in the **Help** tab to open the **PDF-XChange Updater:**
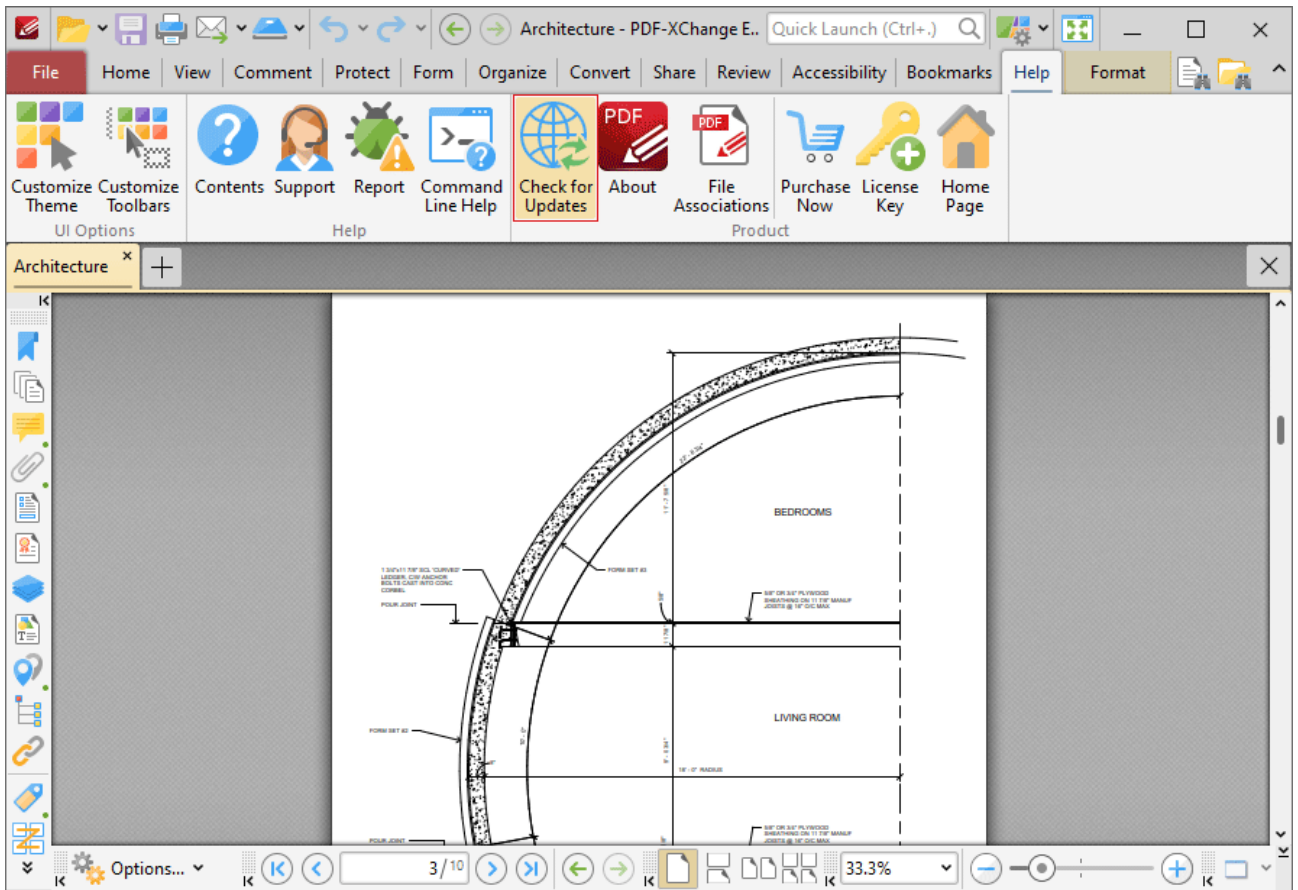
Figure 1. Help Tab, Check for Updates

Or, in the **Classic UI,** users can click **Check for Updates** in the **Help** tab of the **Menu Toolbar:**
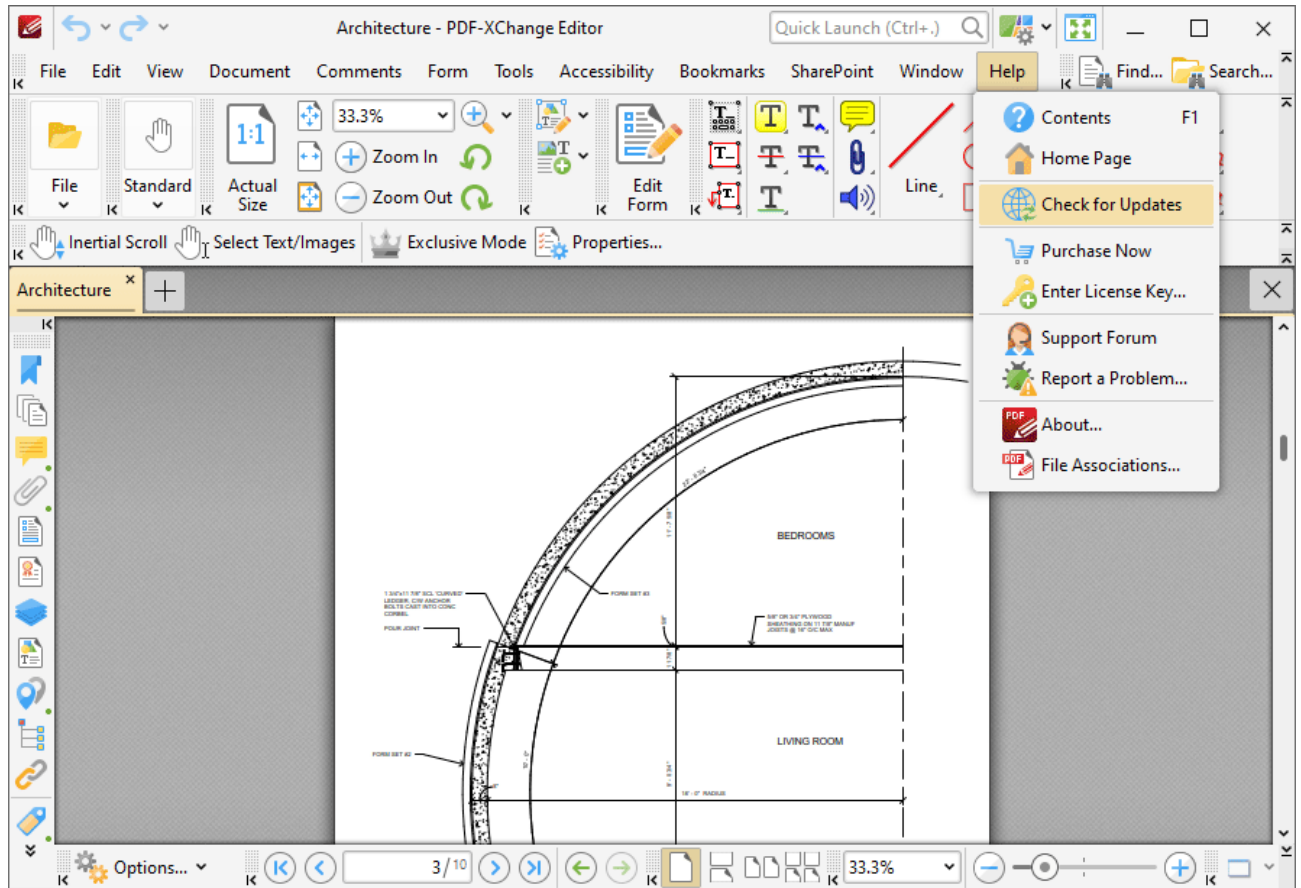
Figure 2. Classic UI, Help Tab, Check for Updates

This launches the **PDF-XChange Updater,** which will download and install any available updates. The **PDF-XChange Updater** interface appears as detailed below:

Figure 3. PDF-XChange Update Dialog Box

- Available updates are displayed in the main window. Click the **Download** button to download and install available updates.
- Click **Update History** to view a breakdown of recent updates.
- Click **Installed Products** to view a breakdown of installed products from **PDF-XChange.**
- Click **Settings** to customize settings for the **PDF-XChange Updater.** These options are detailed beneath *(figure 4)* below.
- Click **Help** to launch the online help for the **PDF-XChange Updater.**
- Select/clear the **Show Hidden Updates** box to show/hide hidden updates.
- Click **Check Again** to check for more recent updates.
- Click **Close** to close the **PDF-XChange Update** dialog box.

Settings

Figure 4. Updater Settings Dialog Box

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

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

Autostart

Use the **Autostart** tab to set a schedule for automatically checking for updates to the software:

Figure 5. Updater Settings Dialog Box, Autostart Tab

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

Click **Save** to save settings.

3.4 Customization

Customization

PDF-XChange Editor contains a range of customizable options with regard to deployment and UI style. Some options are best customized during installation, such as choices that are per-machine actions (all users) and other options are best customized after installation:

Options Best Customized During Installation:

- Licensing options applicable to all users.
- System-wide default settings for PDF file associations.
- Setting the application run-time language.
- Selecting whether or not to create desktop shortcuts.
- Modifying the installation location.
- Selecting which plugins are installed. (Note that installing only the desired plugins is the recommended setup, as opposed to installing all plugins and then disabling the unwanted plugins after installation).

Options Best Customized After Installation:

- User-based default settings for PDF file associations.
- UI customization options such as enabling/disabling and showing/hiding specified tools, toolbars and preferences pages. Note that all tools and toolbar options can be managed via a Group Policy.
- Stamp collections.
- Digital certificates.
- Presets such as scanner settings.

3.4.1   **Set PDF-XChange Editor as the Default PDF Application**

Set PDF-XChange Editor as the Default PDF Application

It is important to note that while per-machine options for setting default file associations are available to installers during deployment, they often cannot be applied to existing user preferences. Users normally have the necessary permissions to disable **PDF-XChange Editor** from being the default application for PDF (and other) files after the application has been installed. Similarly, other applications may set themselves as the default application for specific file formats when they update, or users may select an alternative application as the default application.

Window 10 vs Earlier Versions of Windows

Setting file associations programatically was relatively simple in earlier versions of **Windows. Microsoft** made this process more difficult from **Windows 10** as a security measure against malicious software making unwanted changes to user systems. Setting registry keys is no longer sufficient as a result of these security measures, and user interaction is now necessary in order to set file associations.

User Sessions and the Windows Registry

Although a system-wide (per-machine) preference can be set in HKLM, users may also have their own file associations specified in HKCU. If an installation of **PDF-XChange Editor** take place and the default .pdf associations are specified for **PDF-XChange Editor** in the HKLM, then all users *without existing .pdf file associations* will have **PDF-XChange Editor** set as their default application for .pdf files on the first run. However, this association will not affect the settings for users who already have an existing .pdf file association on their machine, and **PDF-XChange Editor** will not be set as the default application for those users.

This problem can be mitigated by removal of the key:

```
Computer\HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Explorer\FileExts\.p
```

User preferences for .pdf file associations will revert to the system-wide (per-machine) setting when this key has been removed.

3.4.1.1   Setting File Associations One Time

 Setting File Associations One Time

File associations can also be set in **PDF-XChange Editor** with the option of allowing users to change them as desired. This can be done using the file associations preferences in **PDF-XChange Editor,** as detailed **here,** or silently with the **PDF-XChange Editor** executable and the switch **/fileassoc,** as detailed below.

All users (per-machine)

Use the command line below to make a system-wide (per-machine/all users) .pdf file association to **PDF-XChange Editor:**

```
"%programfiles%\Tracker Software\PDF Editor\PDFXEdit.exe" /fileassoc:user=no
```

Please note that this must be performed with an administrative account that has access to HKLM. It will not affect users who already have file associations for .pdf, but this can be mitigated by removal of the key:

```
Computer\HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Explorer\FileExts\.p
```

User preferences for .pdf file associations should revert to the system-wide (per-machine) settings when this key has been removed.

Current User (per-user)

Setting the .pdf file association per-user requires access to HKCU. This can be done using the file associations preferences in **PDF-XChange Editor,** as detailed **here,** or silently with the **PDF-XChange Editor** executable and the switch **/fileassoc**, as detailed below:

```
"%programfiles%\Tracker Software\PDF Editor\PDFXEdit.exe" /fileassoc:user=yes
```

This does not require administrative rights, but must be performed from within the target user's session. The command lines available are detailed in the online manual **here.**

If you want to push a per-user association across an enterprise, then put the command in a script and push it as a logon, runonce or similar method, and ensure it runs in the session of target users. This command must be run as the targeted user from within a logged-on session to ensure the changes affect the HKCU of that user.

3.4.1.2   Enforcing File Associations via Group Policy

Enforcing File Associations via Group Policy
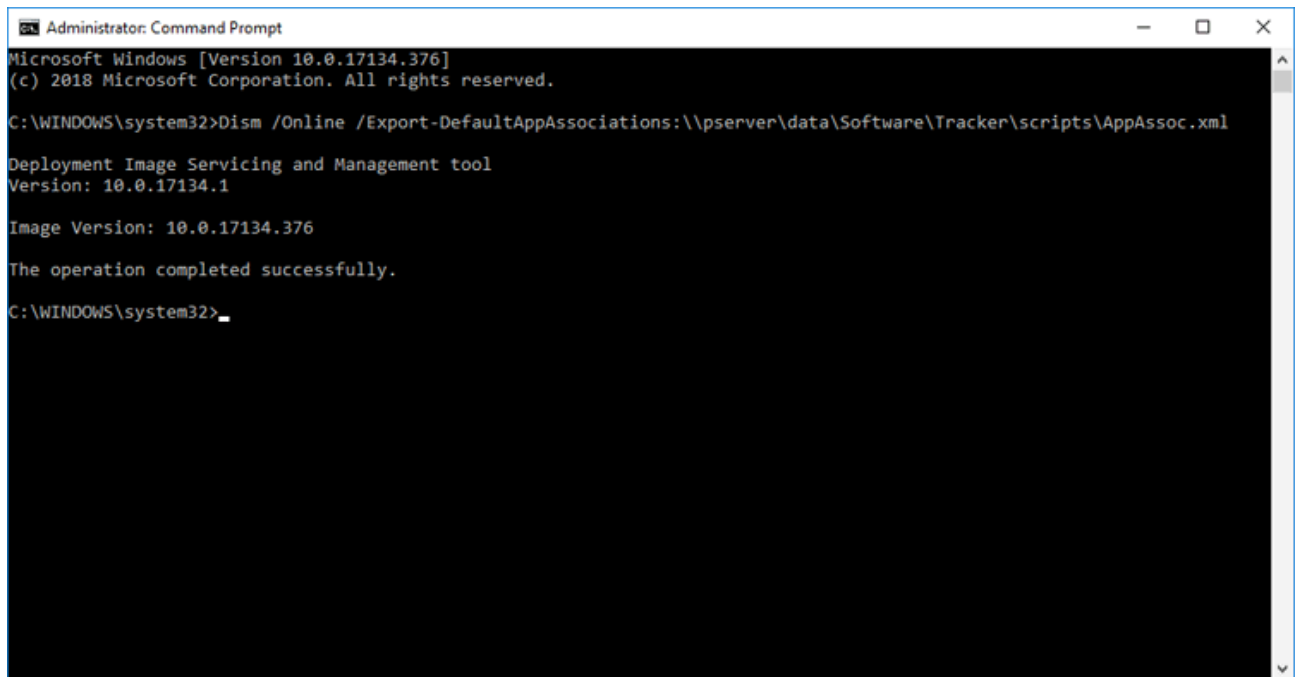
Setting file associations programatically and without user interaction has become increasingly difficult since the release of **Windows 10. Microsoft** made this change as a security measure, and while it does limit the risk to individual users of software making unwanted changes, it also presents a challenge to network administrators for pushing file associations via scripts or during the installation of products. This is especially true in cases where users already have existing .pdf file associations set on their machines (and not such an issue for new installations).

It is important to note that users are free to change file association settings through **PDF-XChange Editor** or through the manipulation of the **Windows** registry. Therefore, it is best to enforce file associations via a Group Policy in cases where it is necessary to deny users the freedom to make permanent changes to file associations. Users will still be able to make changes, but the settings defined in the policy will be reapplied and the file associations restored when the machine's Group Policy is next applied - either when the client logs in or runs GPUpdate.exe.

Create a File Associations .xml File

The first step in the process is to create an .xml file that defines the file associations to enforce. The **DISM** tool at an administrative command prompt can be used to do this on a workstation with the following command:

```
Dism /Online /Export-DefaultAppAssociations:<XML path>\AppAssoc.xml
```

Figure 1. Exporting Current File Associations to an XML File

The output .xml file will list *all* file associations set on the machine. Please ensure these files are set up as desired before the command is run. The .xml file needs to be available to the clients for whom the Group Policy will be applied - therefore it is necessary to either add it to a shared network location or push it to your target machine's local file system. If the latter option is used then it is important that the location is not user-specific. For example, "C:\Windows\System32" can be used as long as it is copied locally to target machines.

Note that Group Policies are used to enforce file associations for *all* file formats. Therefore, the next step of the process is to remove the entries from the .xml file that contain the file formats not to be enforced. This example will detail how to enforce **.fdf, .xfdf, .pdf, xclpack** and **.xcesession** for **PDF-XChange Editor, .pdtex** and **.pdts** for **PDF-Tools** and **.xcvault** for **XCVault.exe**, the utility for managing serial keys:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<DefaultAssociations>
  <Association Identifier=".fdf" ProgId="PDFXEdit.FDF" ApplicationName=
  <Association Identifier=".xfdf" ProgId="PDFXEdit.XFDF" ApplicationNam
  <Association Identifier=".pdf" ProgId="PDFXEdit.PDF" ApplicationName=
  <Association Identifier=".xclpack" ProgId="PDFXEdit.XCLPACK" Applicat
  <Association Identifier=".xcesession" ProgId="PDFXEdit.XCESESSION" Ap
  <Association Identifier=".pdtex" ProgId="PDFXTools.PDTEX" Application
  <Association Identifier=".pdts" ProgId="PDFXTools.PDTS" ApplicationNa
  <Association Identifier=".xcvault" ProgId="XCVault.XCVAULT" Applicati
</DefaultAssociations>
```

Figure 2. App Association XML File with Recommended Entries for PDF-XChange Editor, PDF-Tools and the XCVault Utility

Using the File Associations File in a Group Policy

Please note that in **Windows Server 2016** it may be necessary to download the Administrative Policy Templates and add the **Windows Explorer** (.admx) and (.adml) files from the policy templates to the policy definitions folder for the central store on your domain controller. The **Microsoft** Administrative Policy Templates are available **here.** The standard location for the policy definitions folder is:

C:\Windows\SYSVOL\domain\Policies\PolicyDefinitions
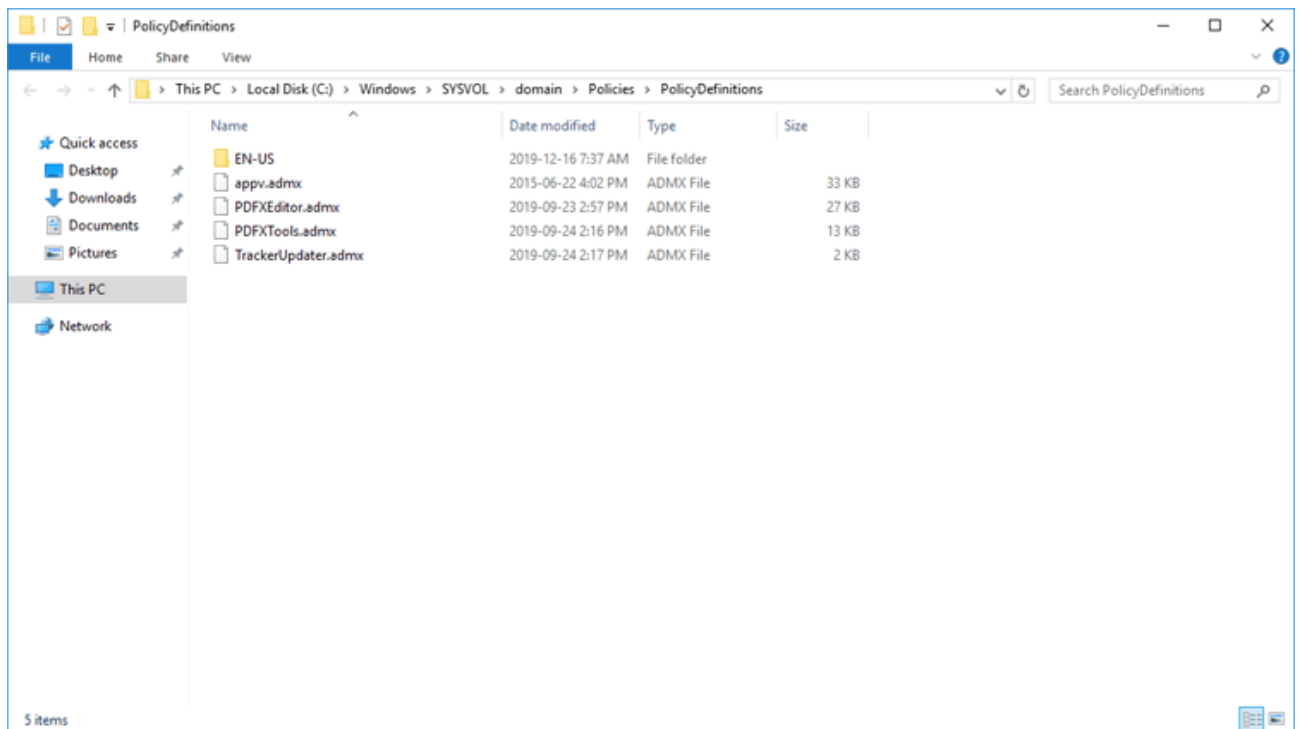
Figure 3. Policy Definitions Folder, Administrative Templates Added

Follow the steps below to use the file associations file in a Group Policy:

1. Open the **Group Policy Management Editor,** then open the policy "Set a default associations configuration file". This policy is located in **Computer Configuration\Policies\Administrative Templates\All Settings:**
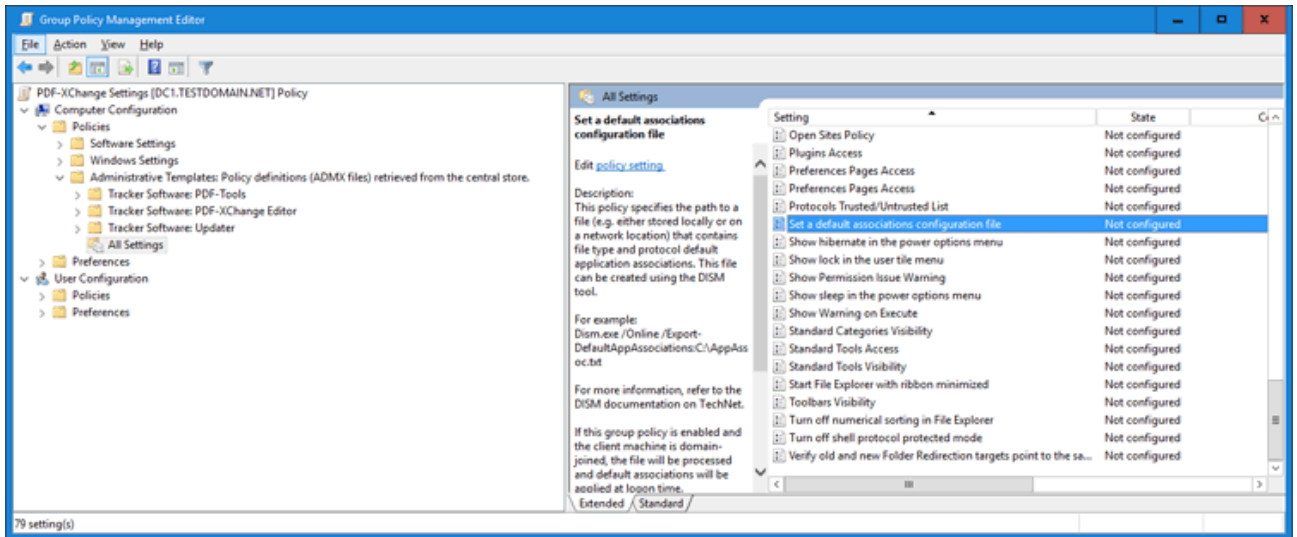
Figure 4. Server 2016 Domain Controller, Group Policy Management Editor, Set a Default Associations Configuration File Highlighted

2. Set the path to the .xml file created above. A network path can be used:
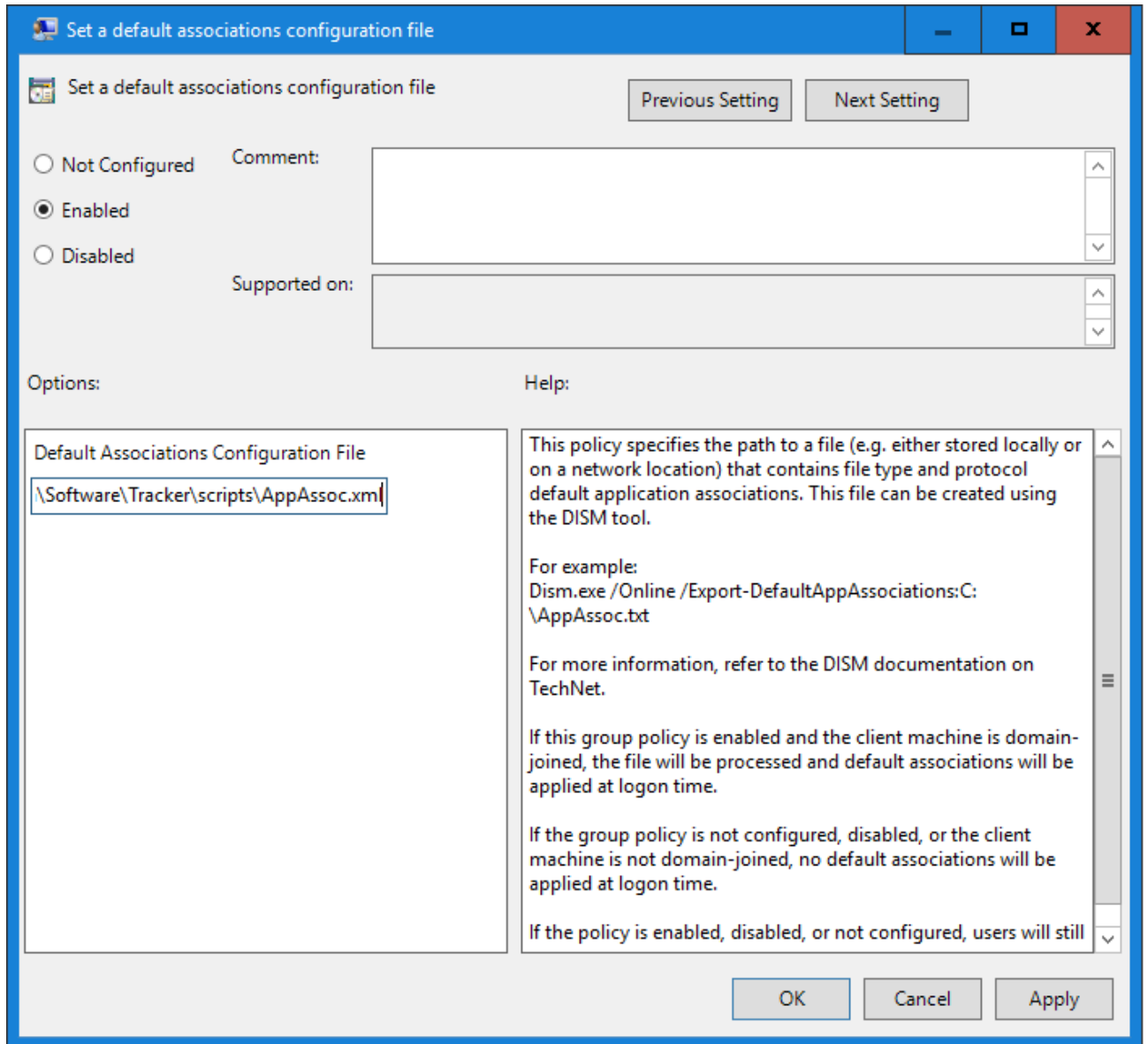
Figure 5. Set a Default Associations Configuration File Dialog Box

3. Update the Group Policy. Run **GPUpdate.exe** on the client or log off an on again to update the local policy. It will be located in:

`Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft\Windows\System`
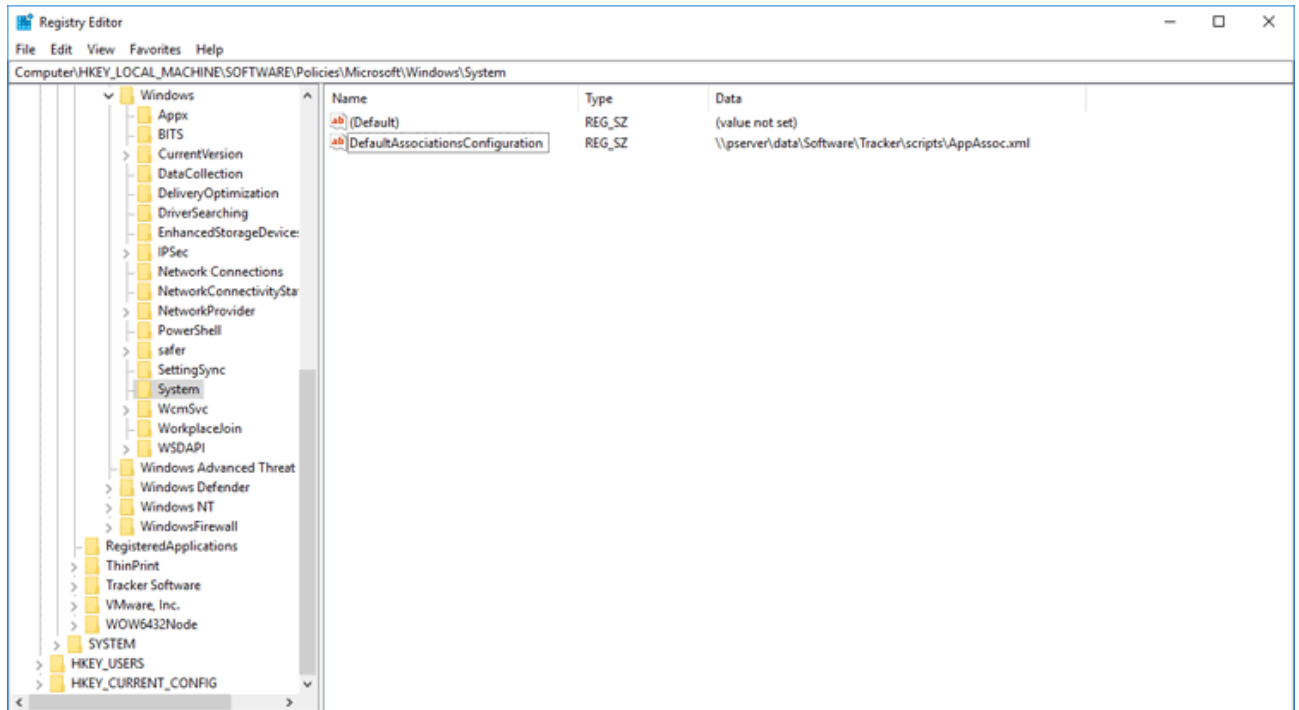
Figure 6. Registry Editor, Default Associations Configuration Policy Set

Please note:

- This example used a domain controller and the policy was applied to domain-joined machines. It can also be applied using a local Group Policy - if you want to do this then simply follow the same steps but use the Local Group Policy Editor instead.
- If users do not have read access to the .xml file then the policy will not be applied. If a network resource is used and it is not persistent, then consider copying it to the local file system of your users, for example to **C:\Windows\System32.**
- Users can change the file associations during their current sessions, but the policy settings will be restored at the next GPUpdate/login.
- **Windows 10** contains a known issue that requires new users to log in twice before policies are set.

3.4.1.3 Enforcing IE MIME-Types to Use the PDF-XChange Editor Plugin via Group Policy

Enforcing IE MIME-Types to use the PDF-XChange Editor Plugin via Group Policy

The **File Associations** preferences in **PDF-XChange Editor** contain the option to use the program as a plugin within **Internet Explorer:**
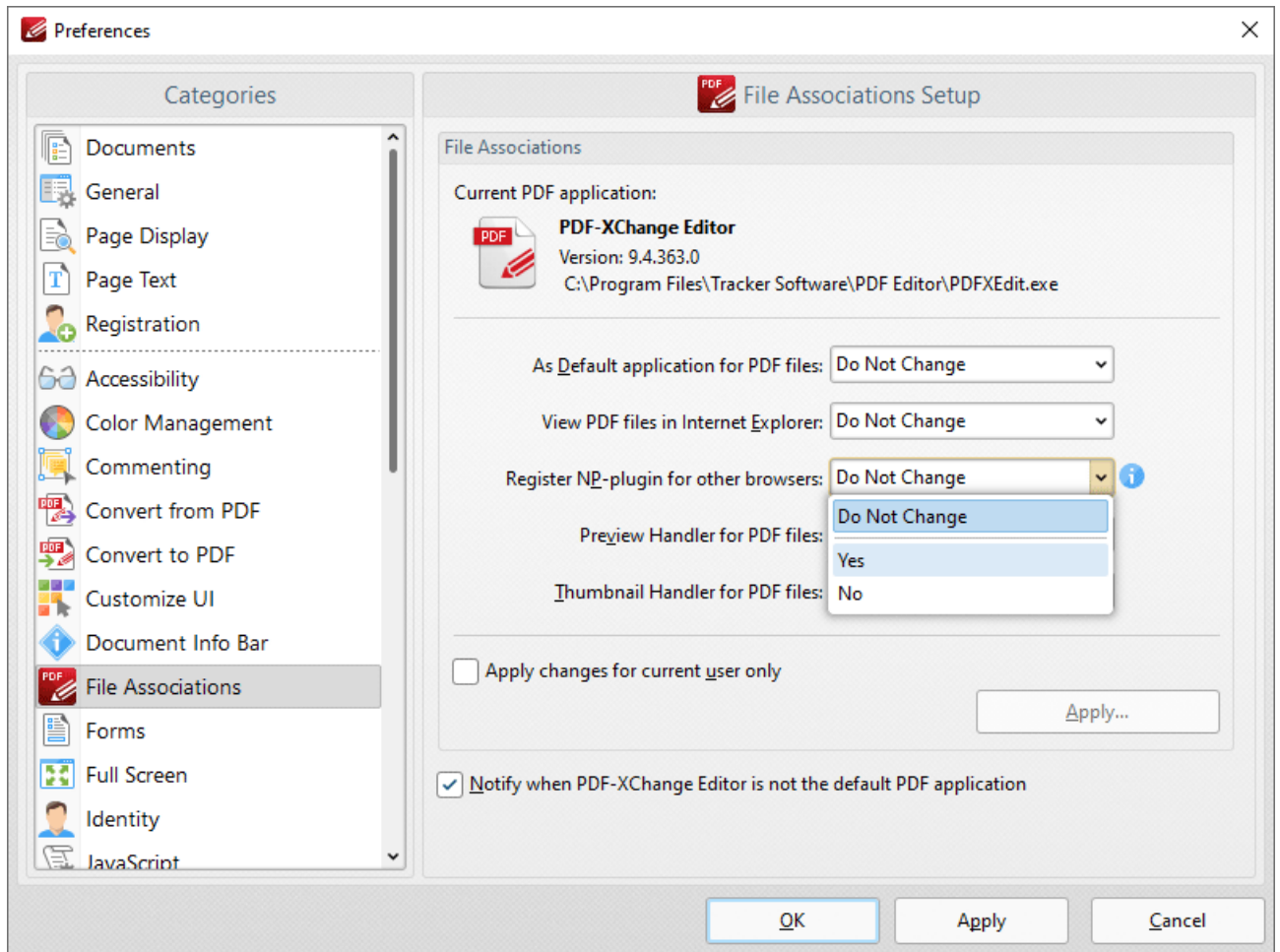
Figure 1. Preferences Dialog Box, File Associations Tab

It is important to note that this setting is not enforced after being set - users/applications can still change the MIME-type settings that define it in the **Windows** registry. It is not possible to prevent these

settings from being changed, but it is possible to create a Group Policy that restores the MIME-types to use the **PDF-XChange Editor** plugin within IE whenever GPUpdate.exe is called.

Four registry keys need to be set in order to make IE open PDF files in the **PDF-XChange Editor** IE plugin:

```
[HKEY_CURRENT_USER\Software\Classes\MIME\Database\Content
Type\application/pdf]
"CLSID"="{53719C00-353D-4FCF-A8AB-1B1027B60A49}"
"Extension"=".pdf"
```

Figure 2. Registry Export for the Two Keys to Set in Current User

and

```
[HKEY_CLASSES_ROOT\MIME\Database\Content Type\application/pdf]
"CLSID"="{53719C00-353D-4FCF-A8AB-1B1027B60A49}"
"Extension"=".pdf"
```

Figure 3. Registry Export for the Two Keys to Set in Classes Root

If you want to create a Group Policy to perform this operation then follow the steps below:

1. Open the Group Policy Management Console (GPMC.MSC).

2. Create a new Group Policy Object (GPO) or select an existing Group Policy Object (GPO) to modify.

3. Right-click the selected Group Policy Object (GPO), then click **Edit.**

4. Expand the **Preferences** folder in either the **Computer Configuration** or **User Configuration** section, then expand the **Windows Settings** folder.

5. Right-click the **Registry** node, then hover over **New** and select **Registry Item.** The **New Registry Properties** dialog box will open.

6. Select **Update** in the **Action** dropdown menu.

7. Select **HKEY_CURRENT_USER** in the **Hive** dropdown menu.

8. Enter **SOFTWARE\Classes\MIME\Database\Content Type\application/pdf** in the **Key Path** text box.

9. Enter **Extension** in the **Value name** text box.

10. Enter **REG_SZ** in the **Value type** text box.

11. Enter .**pdf** in the **Value data** text box:
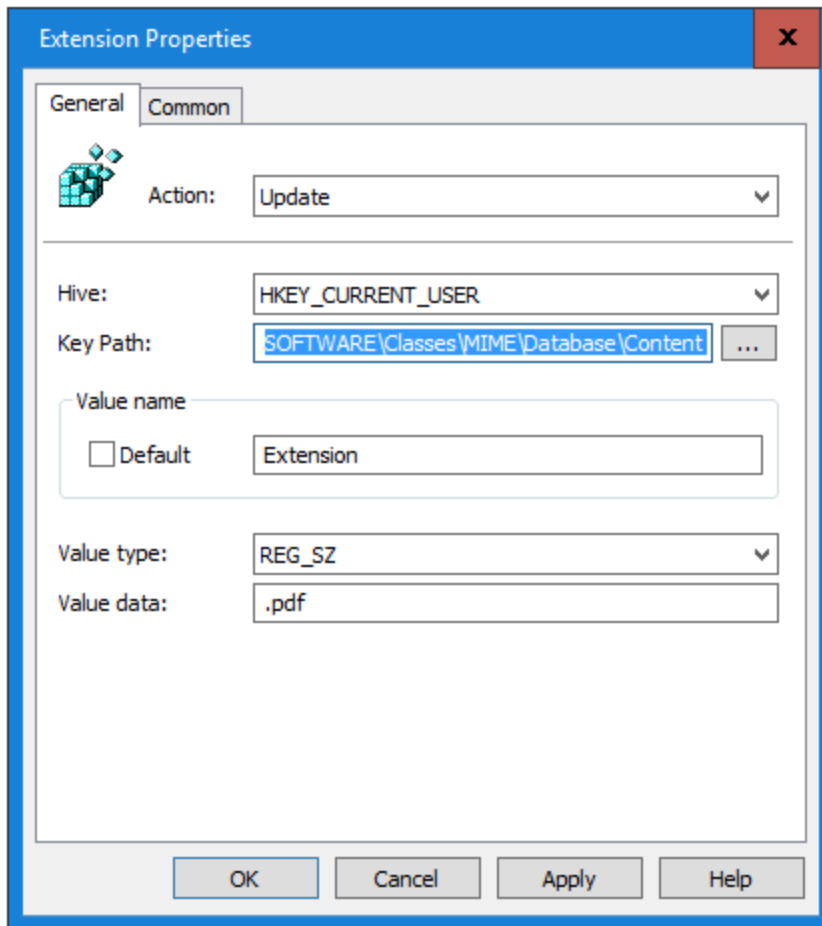
Figure 4. New Registry Properties Dialog Box

12. Click **OK.**

13. Follow the same steps for the other three keys using the remaining values from the registry exports detailed above. The keys will be located in two locations:
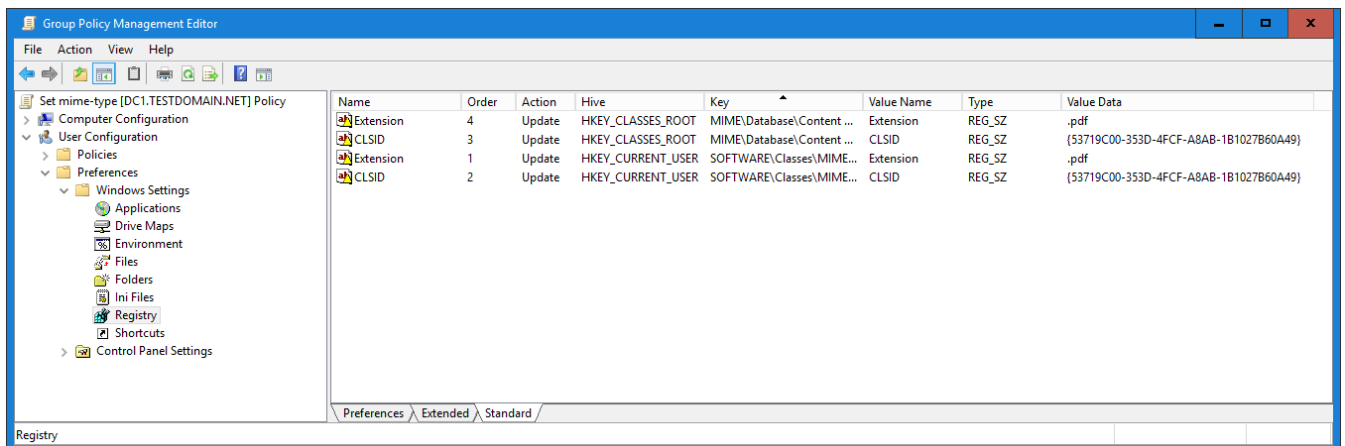
Figure 5. Group Policy Management Editor, Key Locations

Note that 'Protected Mode' must be disabled in **Internet Explorer** in order for the plugin to run. Therefore it is necessary to create a policy that disables 'Protected Mode.' You can do this as follows:

1. Right-click your policy and then click **Edit.**

2. Expand **User Configuration,** then expand **Preferences** and **Control Panel Settings** and right-click **Internet Settings.**

3. Click **New** and then click the version of **Internet Explorer** that you are using.

4. Configure the desired **Internet Explorer** settings, then click **Apply** and **OK.**
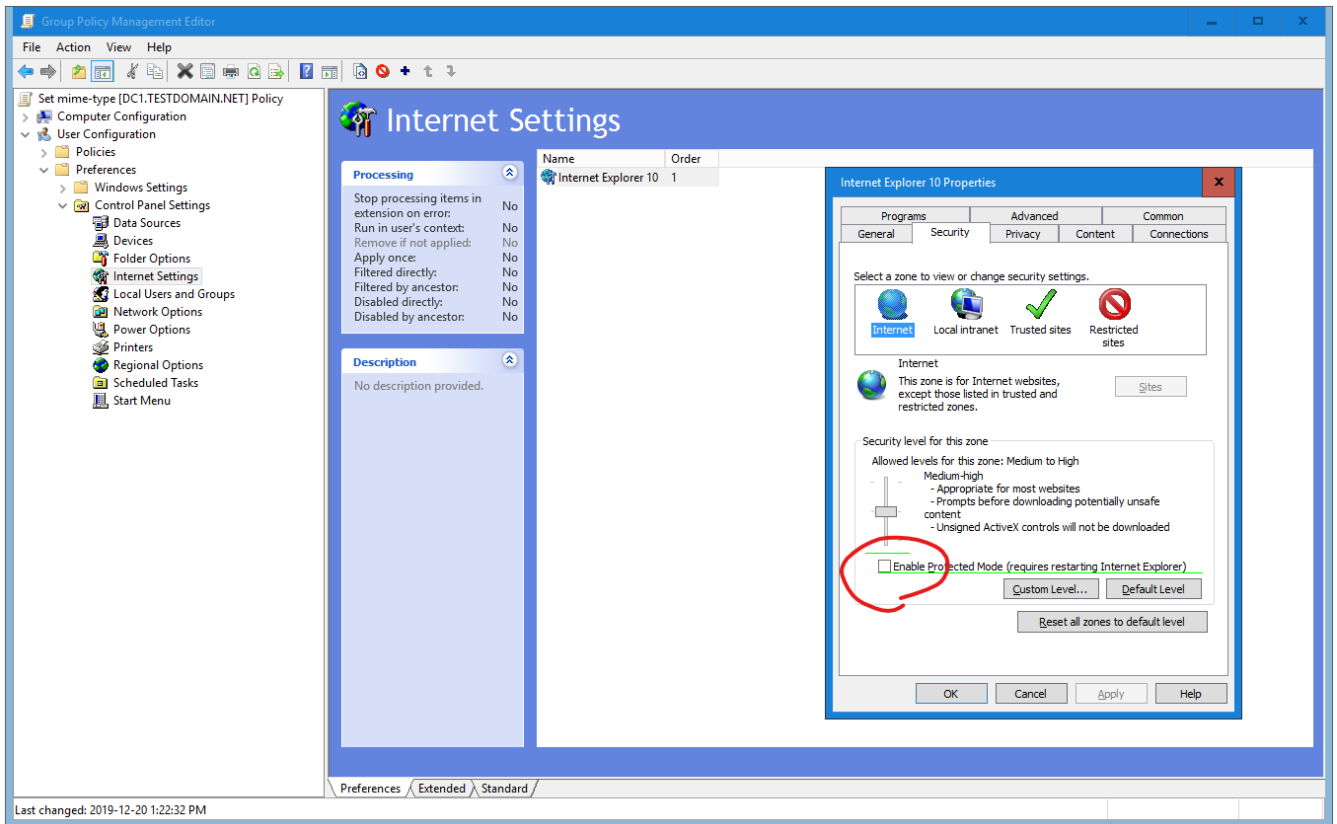
FIgure 6. Group Policy Management Editor, Internet Settings

3.4.2 **Customising the User Interface (UI)**

Customizing the User Interface

Customizing the UI can be performed using either a Group Policy or a settings file. Please see the links below for further information:

- **Customizing Toolbars and Commands via Group Policy** [171]
- **Creating and Applying a Settings File** [203]

3.4.3 **Active Directory Administrative Template for PDF-XChange Editor**

 Active Directory Administrative Template

The **Active Directory** administrative template for **PDF-XChange Editor** consists of two files, **PDFXEditor.admx** and **PDFXEditor.adml**, both of which are available via this permanent link to a zip archive of all the templates: **https://www.pdf-xchange.com/Tracker_AD_AdministrativeTemplates.zip**

Note that it is necessary for both of these files to be installed in the "Central Store" of your domain controller in order to utilize the administrative template. Further information on using these templates to set up your domain controller is available **here.**

Additionally, please note that not all features in **PDF-XChange Editor** are available for template management. Available policies are detailed below:

- **Document Info Bar** 139
- **File Associations** 141
- **JavaScript** 142
- **Miscellaneous** 144
- **Plugins** 147
- **Preferences** 150
- **Registration** 153
- **Security** 156
- **Toolbars/Menus Options** 161
- **Update** 169

3.4.3.1 Available Policies

Available Policies

The **PDF-XChange Editor** administrative template organizes its policies into ten categories. When these policies are viewed on a domain controller using the "Group Policy Management Editor" they appear as detailed below:
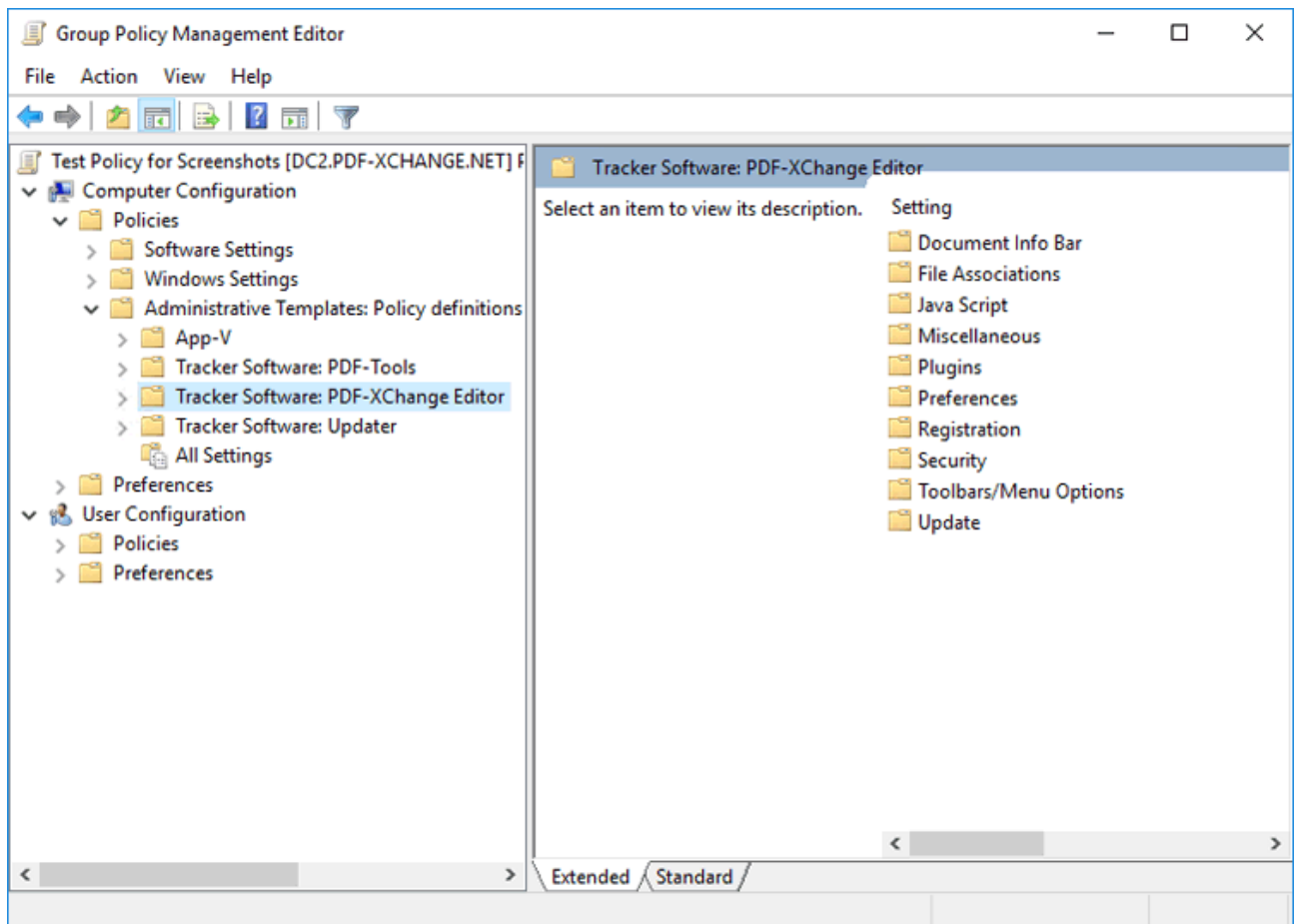
Figure 1. PDF-XChange Editor Administrative Template Policies

Further information about each policy is available at the links below:

- **Document Info Bar** 139

3.4.3.1.1 Document Info Bar

 Document Info Bar

Category:	Document Info Bar
Policy Name:	Document Info Bar
Requirements:	PDF-XChange Editor v7.0.323 or later.
Description:	A list of document info bar panels with their permission levels. The list is a string of elements each separated by a '|' (pipe) character. Each element consists of two parts separated by a ':' (colon). The first part is a document info bar panel ID, and the second part is the access mode level. Possible levels are: 　0 - disable; 　1 - enable; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\DocInfoBar
Reg Key Name:	t.Spans
Registry Key Type:	REG_SZ
Available Values:	**Standard document info bar panel IDs:** 　　docInfoBarSpan.ProFeaturesUsed = "Protected Features" 　　docInfoBarSpan.ViewSignVer = "Signed Version" 　　docInfoBarSpan.PDFA = "PDF/A Document"

	docInfoBarSpan.DigiSig = "Digital Signature" docInfoBarSpan.Form = "Form" docInfoBarSpan.ApplyRedact = "Redaction" docInfoBarSpan.ApplySign = "Signatures and Initials" docInfoBarSpan.BrokenFlags = "Broken Document" docInfoBarSpan.FlashAvail = "Flash Player" docInfoBarSpan.UR3 = "Acrobat Reader Protection" docInfoBarSpan.CryptAlter = "Unauthorized Alteration" docInfoBarSpan.DefaultLayer = "Default Layer" mainInfoBarSpan.licenseInfo = "License Info" ibar.sharepoint = "SharePoint Document"

Please note that panel IDs are case sensitive.

Examples:

'*:0|DigiSig:1' - disable all info bars except the "Digital Signature" info bar.
'*:0|DigiSig:1|Form:1' - disable all info bars except the "Digital Signature" and "Form" info bars.
'ProFeatureUsed:0|ApplyRedact:0' - disable only the "Pro Feature Used" and "Apply Redaction" info bars.
'Form:0' - disable only the "Form" info bar.

3.4.3.1.2 File Associations

File Associations

Category:	File Associations
Policy Name:	Check if PDF-XChange Editor is default application
Requirements:	PDF-XChange Editor v5.5.314 or later.
Description:	Specifies whether or not PDF-XChange Editor can check if it is the default PDF application on start-up and, in cases where it isn't, prompt the user to make it the default PDF application.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software \Policies\Tracker Software\PDFXEditor \3.0\FileAssociations\
Reg Key Name:	b.AllowCheck
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to check if it is the default PDF application. Set to "0 -Disabled" to prevent **PDF-XChange Editor** from performing this check.

3.4.3.1.3 JavaScript

 JavaScript

Category:	Java Script
Policy Name:	Enable JavaScript Actions
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Allows the execution of JavaScript actions inside documents.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\JavaScript
Reg Key Name:	b.Enable
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Example: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to run JavaScript actions. Set to "0 -Disabled" to prevent **PDF-XChange Editor** from running JavaScript actions.

Category:	Java Script
Policy Name:	Enable JavaScript Interactive Console
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Allows the use of the interactive JavaScript console.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\JavaScript
Reg Key Name:	b.EnableConsole
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to open the JavaScript console. Set to "0 -Disabled" to prevent **PDF-XChange Editor** from opening the JavaScript console.

Category:	Java Script
Policy Name:	Show Warning on Execute
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not a warning message is displayed when JavaScript actions are executed without the necessary permissions.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\JavaScript
Reg Key Name:	b.WarnOnExecute
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to warn users when JavaScript is executed. Set to "0 -Disabled" to prevent **PDF-XChange Editor** from showing warnings when running JavaScript.

3.4.3.1.4 Miscellaneous

![PDF icon] **Miscellaneous**

Category:	Miscellaneous
Policy Name:	Allow use of the ReOpen function (atomic file reopen)
Requirements:	PDF-XChange Editor v7.0.323 or later.
Description:	The ReOpen function allows changes to access levels for an open file from 'for reading' to 'for writing' and vice versa without closing and reopening the file. Please note that some file systems do not implement this function correctly. Disable this option to prevent the use of the ReOpen function and instead use the CreateFile/CloseHandle pair of functions.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Misc
Reg Key Name:	b.AllowUseReOpen
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to use the ReOpen function. Set to "0 -Disabled" to force **PDF-XChange Editor** to use the CreateFile/CloseHandle pair of functions instead.

Category:	Miscellaneous
Policy Name:	Default Paper Size
Requirements:	PDF-XChange Editor v7.0.325 or later.
Description:	Specifies the default page size for creating/editing documents.

Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Misc
Reg Key Name:	i.DefPaperIndex
Registry Key Type:	REG_DWORD
Available Values:	Auto (Regional), A4, Letter/ANSI A, US Legal, A3, Tabloid/ANSI B, ANSI_C, ANSI_D, ANSI_E, ANSI_F.

Examples: "Enabled" sets the default paper size to the value selected from the drop down list. "Disabled" or "not configured" reverts to "Auto (Regional)" or, if a user has modified it since installation, to the current user settings.

Please note:

- Auto (Regional) will default to A4 for all locations except the US and Canada, which will default to Letter/ANSI.
- The dropdown list is hard-coded in **PDF-XChange Editor** and cannot be modified by users or administrators. If you have a requirement for a default paper size that is not in the list then please email **support@pdf-xchange.com** and request your desired default paper size to be added - we will consider all reasonable requests.

Category:	Miscellaneous
Policy Name:	Get User Identity Information from Active Directory
Requirements:	PDF-XChange Editor v8.1.332 or later.
Description:	This policy takes user identity information from Active Directory (instead of user settings). The user identity information is detailed in the Preferences tab of PDF-XChange Editor.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Misc
Reg Key Name:	i.GetInfoFromAD
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" means that **PDF-XChange Editor** will take user identity information from Active Directory instead of taking it from user settings.

3.4.3.1.5 Plugins

Plugins

Category:	Plugins
Policy Name:	Plugins Access
Requirements:	PDF-XChange Editor v7.0.323 or later.
Description:	A list of plugins with their permission levels. The list is a string of elements each separated by a '|' (pipe) character. Each element consists of two parts separated by a ':' (colon). The first part is a plugin GUID in '{}' or a plugin file name without an extension. The second part is the access mode level. Possible levels are: 0 - disable; 1 - enable; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Plugins
Reg Key Name:	t.Access
Registry Key Type:	REG_DWORD
Available Values:	AzureRMS - the plugin for handling PDF files protected by MS Azure RMS. Bookmarks - the plugin that facilitates the inclusion of advanced functionality for bookmarks. BoxFileSys - the plugin that enables working with files located on **Box.com.** ColorConvert - the plugin that enables the conversion of colors in PDF documents.

	ConvertPDF - the plugin that enables the conversion of PDF documents into OXML format.
	CSVtoPDF - the plugin that enables the conversion of .csv files to tables in PDF documents.
	DropBox - the plugin that enables the software to work in conjunction with files located on the **Dropbox™** cloud.
	EnhancedOCRa - the plugin that facilitates the use of the enhanced OCR features.
	FileOpenSH - the security plugin that handles FileOpen DRM.
	Google Drive - the plugin that allows the software to work with files located on **Google Drive™** cloud storage.
	IdentifyForms - the plugin that enables the detection and creation of form fields in documents converted to PDF.
	MarkdownPlugin - the plugin that enables the conversion of Markdown files into PDF documents.
	OCRPlugin - the plugin that enables the OCR of image-based PDF files in the software.
	OneDrive - the plugin that enables working with files located on **Microsoft OneDrive™.**
	PDFAPlugin - the plugin that converts PDF files into PDF/A format.
	PDFOptimizer - the plugin that optimizes PDF files.
	ReadOutLoud - the plugin that provides read-out-loud functionality.
	SanitizePlugin - the plugin that enables the sanitization of documents.
	SharePoint - the plugin that allows the software to work with files located on **Sharepoint™/Office 365™** servers.
	SpellChecker - the spell-checker plugin.
	U3DPlugin - the plugin that enables the viewing of embedded 3D content in PDF documents.

Examples:

'SharePoint:0' - disable only the **Sharepoint** plugin.
'*:0|bookmarks:1' - disable all plugins except the **Bookmarks** plugin.
'*:0|PDFAPlugin|OCRPlugin|PDFAPlugin|PDFOptimizer|SpellChecker:1' - disable all plugins except the plugins included in the list.

Note that the values available in the list above are the names of the plugin files detailed in the **Plugins** category of the **PDF-XChange Editor** preferences:
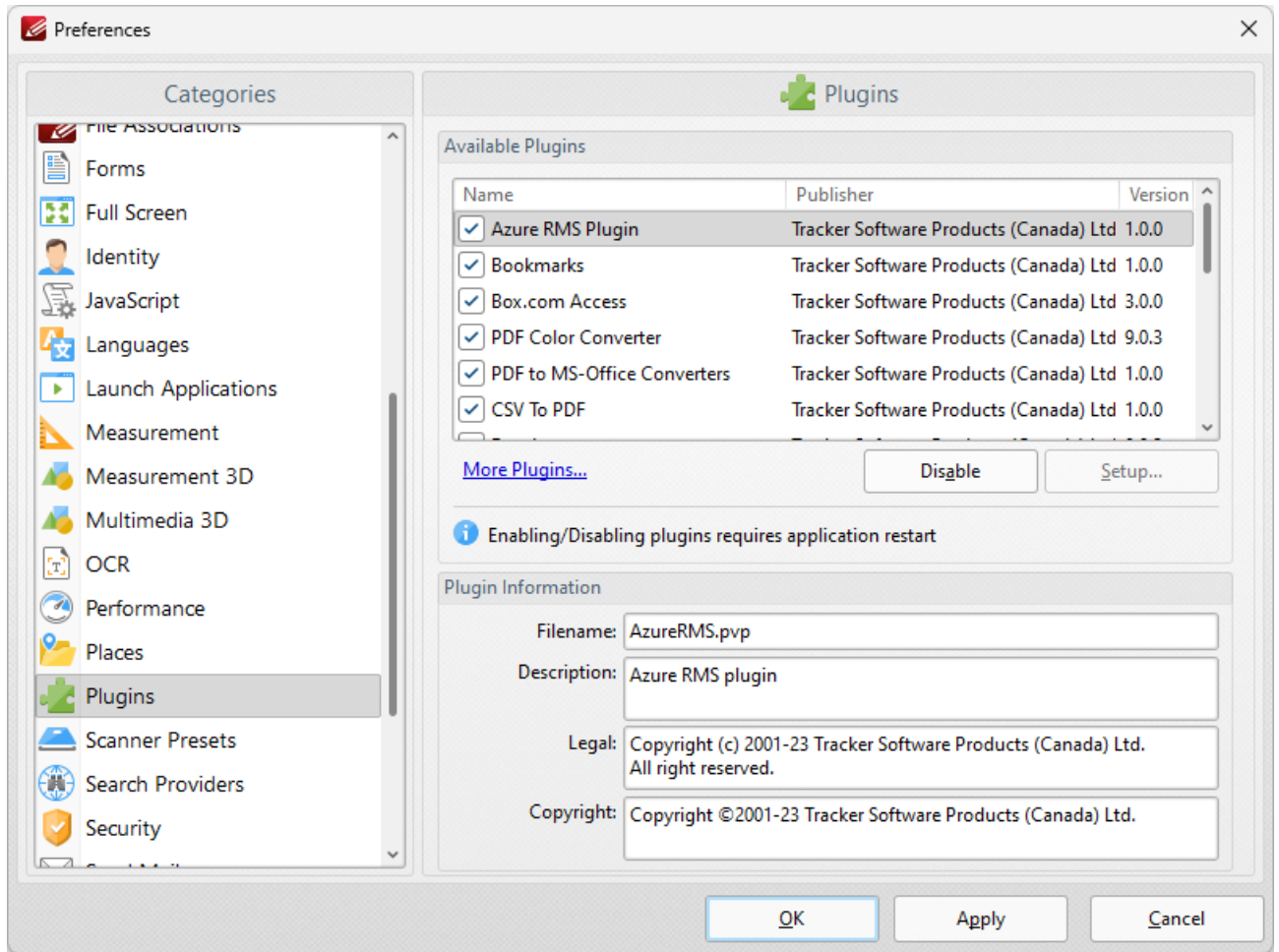
Figure 1. PDF-XChange Editor Plugins Preferences

3.4.3.1.6 Preferences

Preferences

Category:	Preferences
Policy Name:	Preferences Pages Access
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	A list of IDs of the pages in the 'Preferences' dialog box with their access modes. The list is a string of elements each separated by a '|' character. Each element consists of two parts separated by ':' (colon). The first part is the ID of the preference page and the second part is the access mode number. Possible access modes are: 0 - hide; 1 - show (by default); 2 - disable. An asterisk '*' defines the level for all pages that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\AppPrefs
Reg Key Name:	t.PagesAccess
Registry Key Type:	REG_SZ
Available Values:	**Standard Page IDs:** Accessibility, Assoc, ColorMan, Commenting, CustomUI, Defaults, Docs, ExportConverters, Forms, FullScreen, Identity, ImportConverters, JavaScript, Languages, LaunchApp, Mail, Measurement, PageDisplay, PageText, Performance, Plugins,

	Registration, Rendering, ScannerPresets, SearchProviders, Security, Signatures, Snapshot, Speech, Update.

Examples:

Registration:0 - to hide the 'Registration' page.
*:0|Docs:1 - to show only the 'Documents' page.
*:0|Docs:1|JavaScript:1|Languages:1|Commenting:1 - to hide all preferences pages except the four listed. The end user in this case will see only these four preferences when they open the preferences of **PDF-XChange Editor:**
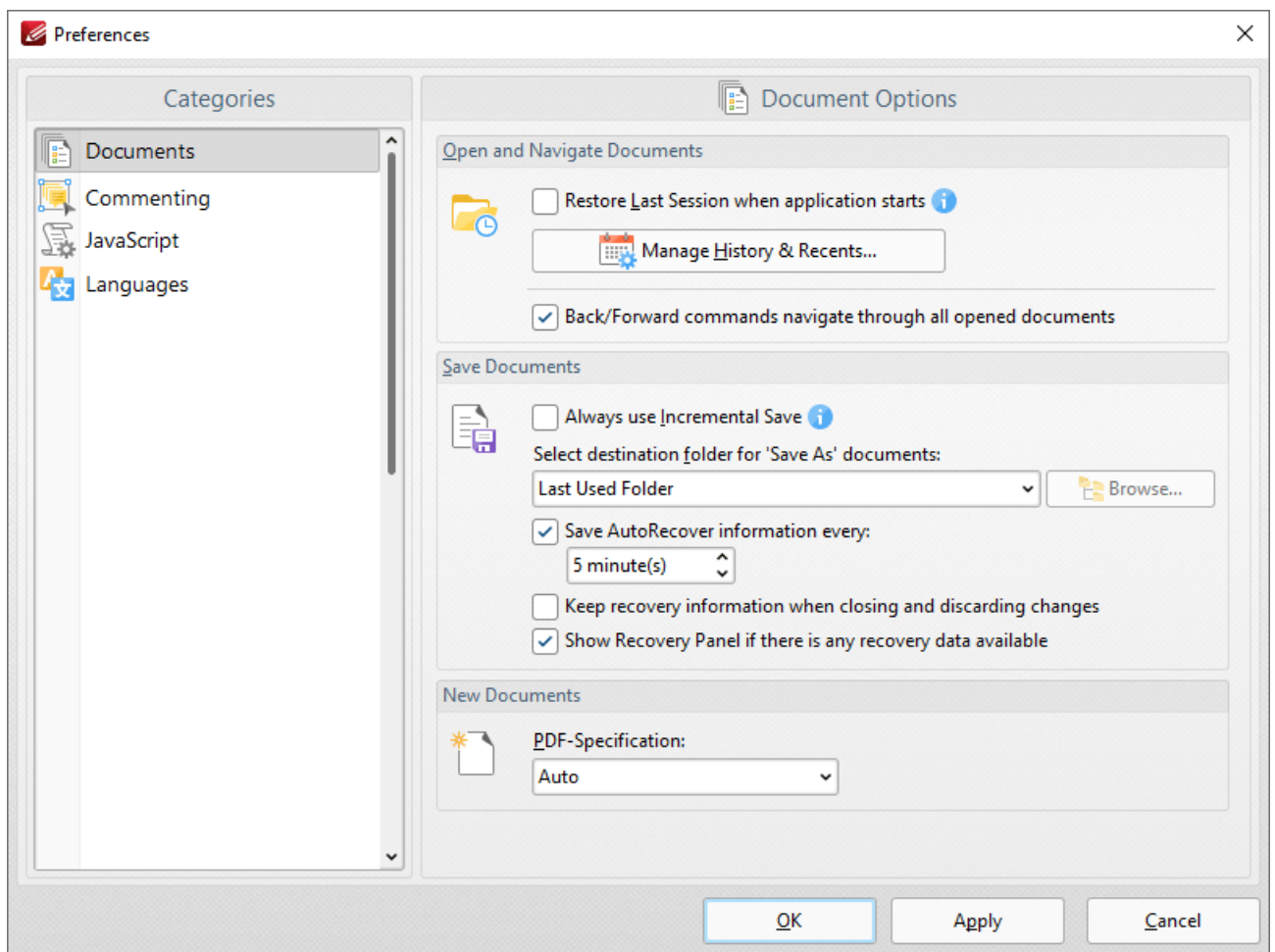
Figure 1. PDF-XChange Editor with a limited set of Preference pages as dictated by the policy values: *:0|Docs:1| JavaScript:1|Languages:1|Commenting:1

The default **PDF-XChange Editor** preferences are detailed below for comparison:
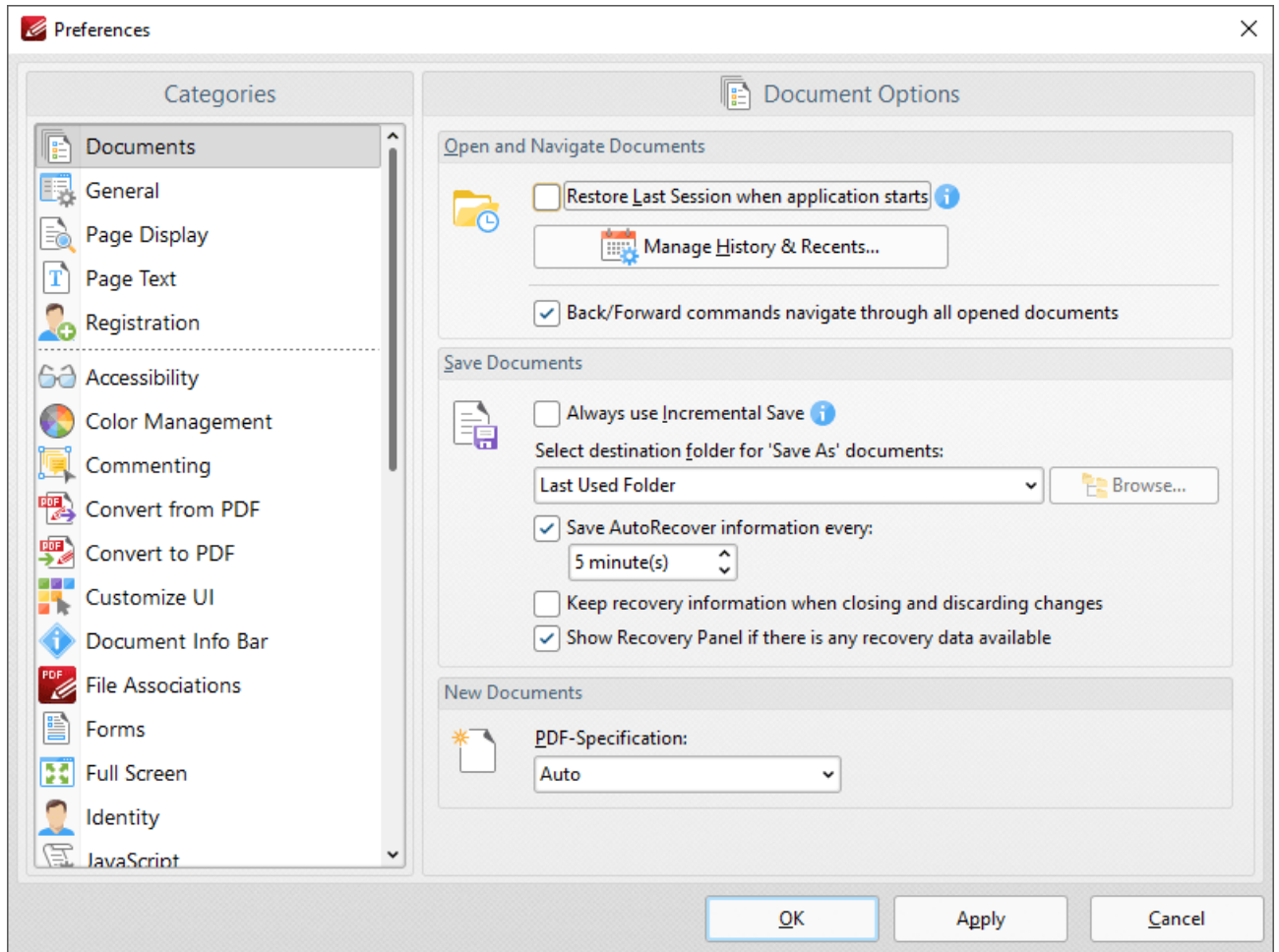
Figure 2. PDF-XChange Editor Default Preferences

3.4.3.1.7 Registration

Registration

Category:	Registration
Policy Name:	Allow Keys Activation Notification
Requirements:	PDF-XChange Editor v9.0.350 or later.
Description:	Specifies if application is allowed to show notifications about license keys activation when required.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanShowActivationWarn
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to auto-upgrade all installed serial keys. Set to "0 -Disabled" to prevent keys being auto-upgraded.

Category:	Registration
Policy Name:	Allow Copy Serial Key
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	Specifies whether or not users are permitted to copy serial keys to the clipboard from the registration section of the preferences dialog box.

Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanCopySerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to let users copy serial keys.

Category:	Registration
Policy Name:	Allow Delete Serial Keys
Requirements:	PDF-XChange Editor v9.5.366 or later.
Description:	Specifies whether or not users are allowed to delete serial keys in the registration section of the preferences dialog box.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanDeleteSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to let users delete serial keys.

Category:	Registration
Policy Name:	Allow Add Serial Keys
Requirements:	PDF-XChange Editor v9.5.366 or later.
Description:	Specifies whether or not users are allowed to delete serial keys in the registration section of the preferences dialog box.

Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanAddSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to let users add serial keys.

Category:	Registration
Policy Name:	Allow Renew Serial Keys
Requirements:	PDF-XChange Editor v9.5.366 or later.
Description:	Specifies whether or not users are allowed to renew serial keys in the registration section of the preferences dialog box.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Registration
Reg Key Name:	b.CanRenewSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Examples: "Enabled" or "Not Configured" allows **PDF-XChange Editor** to let users renew serial keys.

3.4.3.1.8 Security

Security

Category:	Security
Policy Name:	Open Embeded Files Policy
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	Specifies the behavior of PDF-XChange Editor when opening files embedded inside a PDF document. **Default (-2):** Use the program's default behavior. **Always Ask (-1):** Always ask the user what to do when embedded files are opened. **Deny (0):** Forbids the opening of all embedded files. **Allow (1):** Allows the opening of all embedded files. **Allow PDF (3):** Opens all embedded PDF files without confirmation, but reverts to the default program behavior for other file formats.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	i.OpenEmbedPerm
Registry Key Type:	REG_DWORD
Available Values:	The values available are in a drop down list that is not editable. Current options are those listed in the description above.

Category:	Security
Policy Name:	File-Extensions Trusted/Untrusted List

Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	A list of file extensions with their permission levels. The list is a string of elements each separated by the pipe '|' character. Each element consists of two parts separated by a ':' (colon). The first part is an extension and the second part is its permission level. Possible permission levels are: 0 - always ask user; 1 - always allow; 2 - always deny the extension. An asterisk '*' defines the level for all formats that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	t.OpenFileBWList
Registry Key Type:	REG_SZ
Available Values:	All supported file formats.

Examples:

exe:2\|com:2\|bat:2\|pdf:1\|doc:0\|docx:0 - to prevent executable formats, allow PDFs and always ask for **MS Word** documents.

*:2\|pdf:1 - to allow the opening of only PDF documents.

Category:	Security
Policy Name:	Open Files Policy
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	Specifies PDF-XChange Editor's behavior when files are opened as a result of Launch, URI, GotoR and similar actions. Available values are:

	Default (-2): Uses the program's default behavior. **Always Ask (-1):** Always asks the user what to do when the user wants to open a file linked from inside a PDF. **Deny (0):** Forbids opening all files inside PDF documents. **Allow (1):** Allows the opening of any files without restrictions. **Use Lists (2):** Uses the 'File-Extensions Trusted/Untrusted List' parameter. **Allow PDF (3):** Always opens PDF files without confirmation, and uses the default behavior for other file formats. An asterisk '*' defines the level for all formats that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	i.OpenFilePerm
Registry Key Type:	REG_DWORD
Available Values:	The values available are in a drop down list that is not editable. Current options are those listed in the description above.

Category:	Security
Policy Name:	Protocols Trusted/Untrusted List
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	A list of URI protocols with their permission levels. The List is a string of elements each separated by the '|' character. Each element consists of two parts separated by a ':' (colon). The first part is the protocol and the second part is the permission level. Available permissions levels are: 0 - always ask user; 1 - always allow; 2 - always deny the protocol.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	t.OpenSiteBWList

Registry Key Type:	REG_SZ
Available Values:	All supported file protocols. This is based on the string used to dictate the protocol in question, which means any valid protocols can be used.

Examples:

mailto:0|https:1|file:2 - to prevent the opening of URLs to local files, allow the opening of secured URLs and always ask users for 'mailto' jumps.
*:2|https:1 - to allow only secured URLs.

Category:	Security
Policy Name:	Open Sites Policy
Requirements:	PDF-XChange Editor v5.5.312 or later.
Description:	Specifies PDF-XChange Editor's behavior on opening sites inside PDF documents. Available values are: **Default (-2):** Uses program's default behavior. **Always Ask (-1):** Always ask user what to do every time when user wants to open URL. **Deny (0):** Forbids all URLs **Allow (1):** Allows all URLs **Use Lists(2):** Use the 'Protocols Trusted/Untrusted List' parameter.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	i.OpenSitePerm
Registry Key Type:	REG_DWORD
Available Values:	The values available are in a drop down list that is not editable. Current options are those listed in the description above.

Category:	Security

Policy Name:	Show Permission Issue Warning
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Controls the displaying of notification messages that inform users of the current action being forbidden by an administrator.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Security
Reg Key Name:	b.CanShowOpenPermErrMsg
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

3.4.3.1.9 Toolbars/Menus Options

 Toolbars/Menus Options

Category:	Toolbars/Menu Options
Policy Name:	Lock All Toolbars/Menus
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Locks all toolbars and menus from being customized by users.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.AllBarsLocked
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Lock All Tool-panes
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Locks all tool panes and menus from being toggled/resized by users.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.AllPanesLocked

Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Toolbars Visibility
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies the custom visibility state for certain toolbars.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	t.BarsVisibility
Registry Key Type:	REG_SZ
Available Values:	There are currently sixty-three toolbars available in **PDF-XChange Editor,** and toolbars may be added or removed when new builds are released. Instructions on how to ensure you are using the correct toolbar IDs your version of **PDF-XChange Editor** are available **here.** [174]

Examples:

file:0|commenting:0 - to hide 'File' and 'Commenting' toolbars.
*:0|file:1|commenting:1 - to hide all existing toolbars except the 'File' and 'Commenting' toolbars.

Category:	Toolbars/Menus Options
Policy Name:	Allow Creating Custom Toolbars
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to create new toolbars.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts

Reg Key Name:	b.CanCreateBars
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Allow Removing Custom Toolbars
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to remove custom toolbars.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.CanDeleteBars
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Allow Renaming Custom Toolbars
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to rename custom toolbars.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.CanRenameBars
Registry Key Type:	REG_DWORD

Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Allow Reseting All Customizations of Toolbars/Menus
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to reset all toolbar and menu customizations.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.CanResetAll
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Allow Reseting Toolbars/Menus
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to reset toolbar and menu customizations.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.CanResetBars
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options

Policy Name:	Commands Visibility
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies the custom visibility of some commands in toolbars/menus
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	t.CmdVisibility
Registry Key Type:	REG_SZ
Available Values:	There are currently 840 commands in **PDF-XChange Editor** that can be managed by this policy - and these commands may be updated between builds. Instructions on how to find the correct Command IDs for your version of **PDF-XChange Editor** are available **here.** 176

Examples:

open:0\|save:0 - to hide 'Open' and 'Save' commands in toolbars/menus.
*:0\|open\|save - to hide all commands in toolbars and menus except the 'Open' and 'Save' commands.

Category:	Toolbars/Menus Options
Policy Name:	Commands Availability
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies the custom availability of some commands in toolbars/menus.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	t.CmdAccess
Registry Key Type:	REG_SZ

Available Values:	There are currently 840 commands in **PDF-XChange Editor** that can be managed by this policy - and these commands may be updated between builds. Instructions on how to find the correct Command IDs for your version of **PDF-XChange Editor** are available **here.** [176]

Examples:

open:0|save:0 - to disable the 'Open' and 'Save' commands in toolbars/menus.
*:0|open|save - to disable all commands in toolbars and menus except the 'Open' and 'Save' commands.

Category:	Toolbars/Menus Options
Policy Name:	Hide All Licensed Features
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Hides all licensed features from toolbars and menus.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	b.HidePRO
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Toolbars/Menus Options
Policy Name:	Size of Ribbon Pane (Expanded/Collapsed) in Browser Plug-in
Requirements:	PDF-XChange Editor v7.0.328 or later.
Description:	Specifies the default expanded/collapsed size of the ribbon pane in the browser plug-in.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts

Reg Key Name:	
Registry Key Type:	REG_DWORD
Available Values:	

Category:	Toolbars/Menus Options
Policy Name:	Toolbars Layout in Browser Plug-in (Ribbon/Classic)
Requirements:	PDF-XChange Editor v7.0.328 or later.
Description:	Specifies that the toolbar layout in the browser plug-in is either Ribbon or Classic.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	
Registry Key Type:	REG_DWORD
Available Values:	

Category:	Toolbars/Menus Options
Policy Name:	Toolbars Layout (Ribbon/Classic)
Requirements:	PDF-XChange Editor v7.0.328 or later.
Description:	Specifies that the toolbar layout is either Ribbon or Classic.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\CmdOpts
Reg Key Name:	
Registry Key Type:	REG_DWORD

Available Values:	

3.4.3.1.10 Update

Update

Category:	Update
Policy Name:	Allow User to check for Updates for the application
Requirements:	PDF-XChange Editor v6.0.318 or later.
Description:	Specifies whether or not users are allowed to check for updates to the application.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXEditor\3.0\Update
Reg Key Name:	b.AllowCheck
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Please note that the **PDF-XChange Editor Administrative Template** policy detailed **here** 360 may override this policy. If there is a conflict between update policies then the policy that disables updates will be given priority. For example, if updates are enabled in the **PDF-XChange Editor** policy but disabled in the **Tracker Updater** policy, then updates will not be enabled. Or, if updates are enabled in the **Tracker Updater** policy but disabled in the **PDF-XChange Editor** policy, then updates will not be enabled in **PDF-XChange Editor.**

3.4.3.2   Examples

Examples

This section of the manual contains examples of using a Group Policy to apply and enforce settings in **PDF-XChange Editor:**

- **Customizing Toolbars and Commands via Group Policy** 171
- **Restricting Available Places When Using the "Add a Place" Feature** 190

Additional examples will be added to the manual in the future, so please be sure to check back in order to keep up to date.

3.4.3.2.1 Customizing Toolbars and Commands via Group Policy

Customizing Toolbars and Commands via Group Policy

The ability to customize toolbars and available tools within customized toolbars is a powerful feature of the **PDF-XChange Editor** administrative template. It can be used to create and enforce a significantly customized user interface and end-user experience.

Toolbars

Toolbars display the available commands and buttons in **PDF-XChange Editor.**

- Toolbars can be shown or hidden.
- Hidden toolbars are not displayed in the application UI, which is sufficient to prevent users from accessing them.

Commands

Commands are the actions that **PDF-XChange Editor** performs.

- Commands can be executed in several ways - users can click icons, buttons and menu items, or they can use a keyboard shortcut.
- Commands can be hidden and/or disabled.
- Hidden commands are not displayed in the **PDF-XChange Editor** user interface. However, it is important to note that this may not be sufficient in preventing users from accessing them, as keyboard shortcuts can still be used for hidden commands.
- Hidden commands are visible in (and can be made available via) the **Customize Toolbars** dialog box. If you want to prevent a command from being used then you must disable it.
- Disabled commands that are set to remain visible will be grayed out in the user interface. Users cannot access these commands using any means, including keyboard shortcuts.

Note that there are more than 840 commands available in **PDF-XChange Editor,** and in some cases the functionality of commands is not obvious. This means that the approach of disabling all commands except those that are required can have unexpected and undesired results. Using a Group Policy to customize the UI is best for small changes to the application. If the setup you require is more

complicated than that, then it is best to use a settings file in conjunction with a policy that prevents users from modifying it.

Steps Required to Customize Toolbars and Commands via Group Policy

Customizing toolbars and commands via group policy is a three-step process. The first step is to identify the ID of the toolbars and commands that you require, then you must enable the policy and apply the list of objects to be manged:

1. Identify the ID of the Toolbars and Commands Required

Note that the list of IDs is dynamic, as the commands are related to the functionality of the software, which is continually enhanced and updated. **PDF-XChange Editor** contains a feature that makes it possible to pull the IDs of commands from the version of the application in question, which ensures that administrators receive the correct IDs when they create Group Policies.

- The process of locating the IDs of toolbars is detailed **here.** [174]
- The process of locating the IDs of commands is detailed **here.** [176]

2. Enable the Policy

Note that there are several policies in the **PDF-XChange Editor** administrative template that relate to toolbars and commands. They are located in the **Toolbars/Menus Options** category:
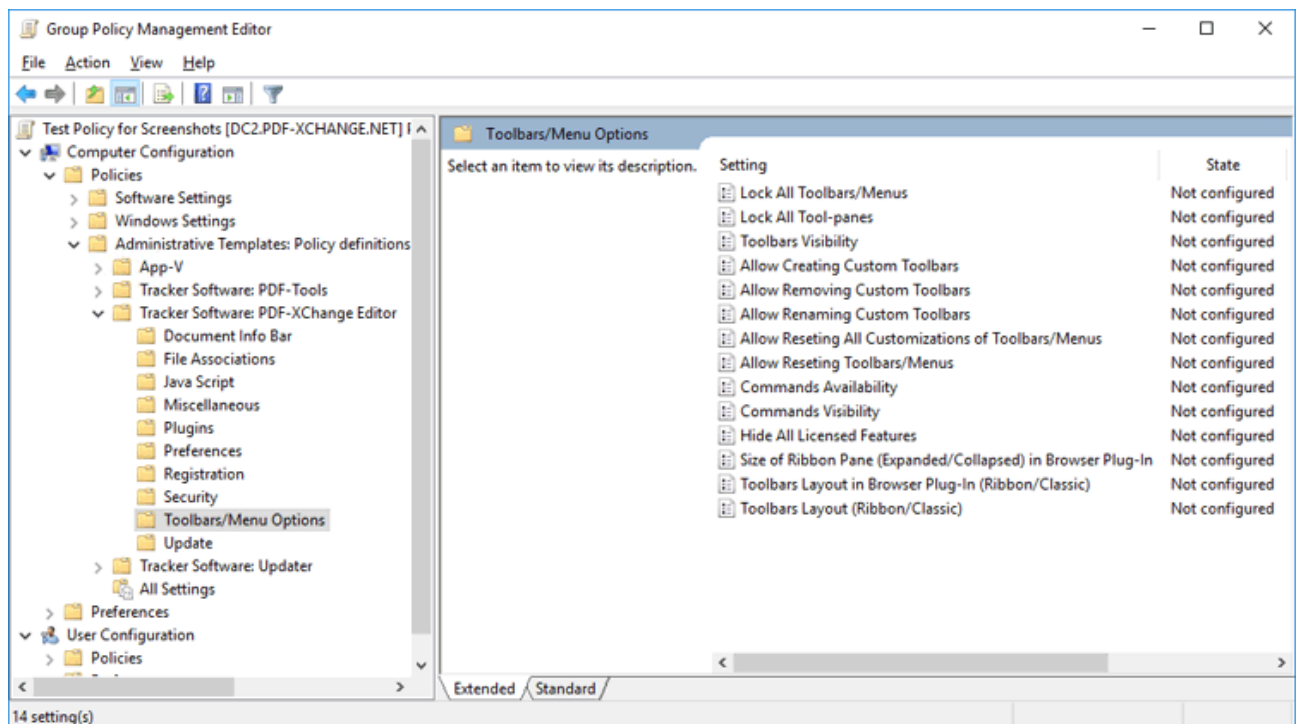
Figure 1. Group Policy Management Editor, Toolbars/Menus Options Category, Available Policies

- **"Toolbars Visibility"** and **"Commands Visibility"** are used to show/hide toolbars and commands respectively.
- **"Commands Availability"** is used to enable/disable commands. (Note that toolbars cannot be disabled, although they can be hidden).
- All policies take a list of items to show/hide, as detailed in their respective policy descriptions, which are detailed **here.** [161]

3. Apply the List of Objects to be Managed

Each object in the list consists of a string (element name) and their permission level, separated by a pipe '|' character. Each element consists of two parts separated by a colon ':' - the first part is the element name (I.e. the toolbar or command ID) and the second part is the permission level. The available permission levels are defined in each policy and are usually an integer value:

<element name>:<integer value>|<element name>:<integer value>|<element name>:<integer value>

Note that an asterisk **'*'** can be used as a wild card to represent "all elements", but it cannot be used within an element name. For example, in the **Toolbars Visibility** policy**:**

*:0|file:1|commenting:1

hides all toolbars except the **File** and **Commenting** toolbars.

The general syntax is as follows:

A:1|B:1|C:2|D:3 - will explicitly set elements **A** and **B** to 1, **C** to 2 and **D** to 3.
*:0|B:1|C:1|D:1|E:2 - will set all elements to 0 except **B, C** and **D,** which will be set to 1, and **E,** which will be set to 2.

Note that unspecified elements will remain "unconfigured", and will not be affected by the policy - users will be able to change them as they would in an unmanaged environment.

3.4.3.2.1.1 Locating the ID of Toolbars

Locating the ID of Toolbars

Follow the steps below to locate the ID of toolbars:

1. Open **PDF-XChange Editor.**

2. Right-click any blank space on a toolbar and then click **Customize Toolbars:**
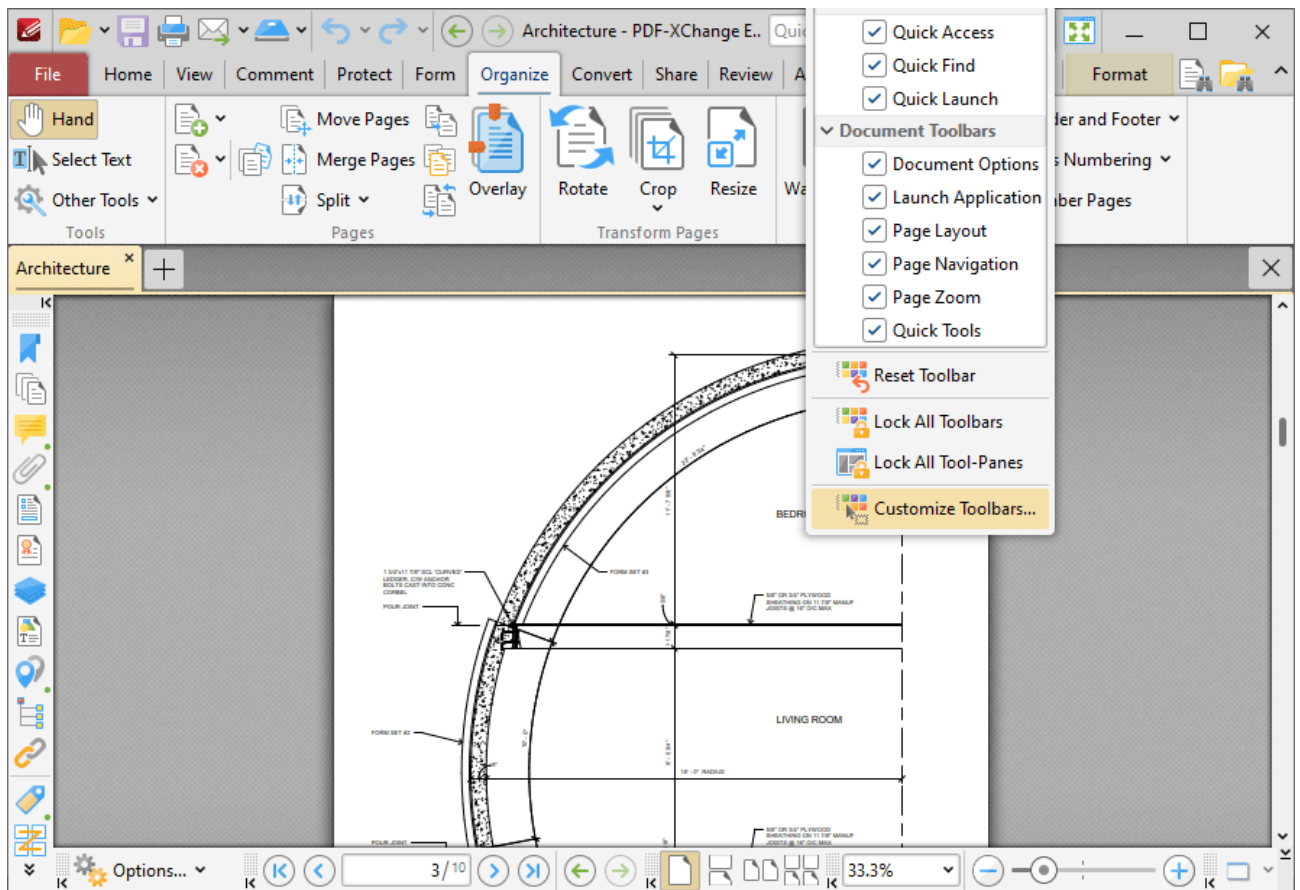
Figure 1. PDF-XChange Editor UI, Right-Click Context Menu, Customize Toolbars Highlighted

The **Customize Toolbars** dialog box will open:
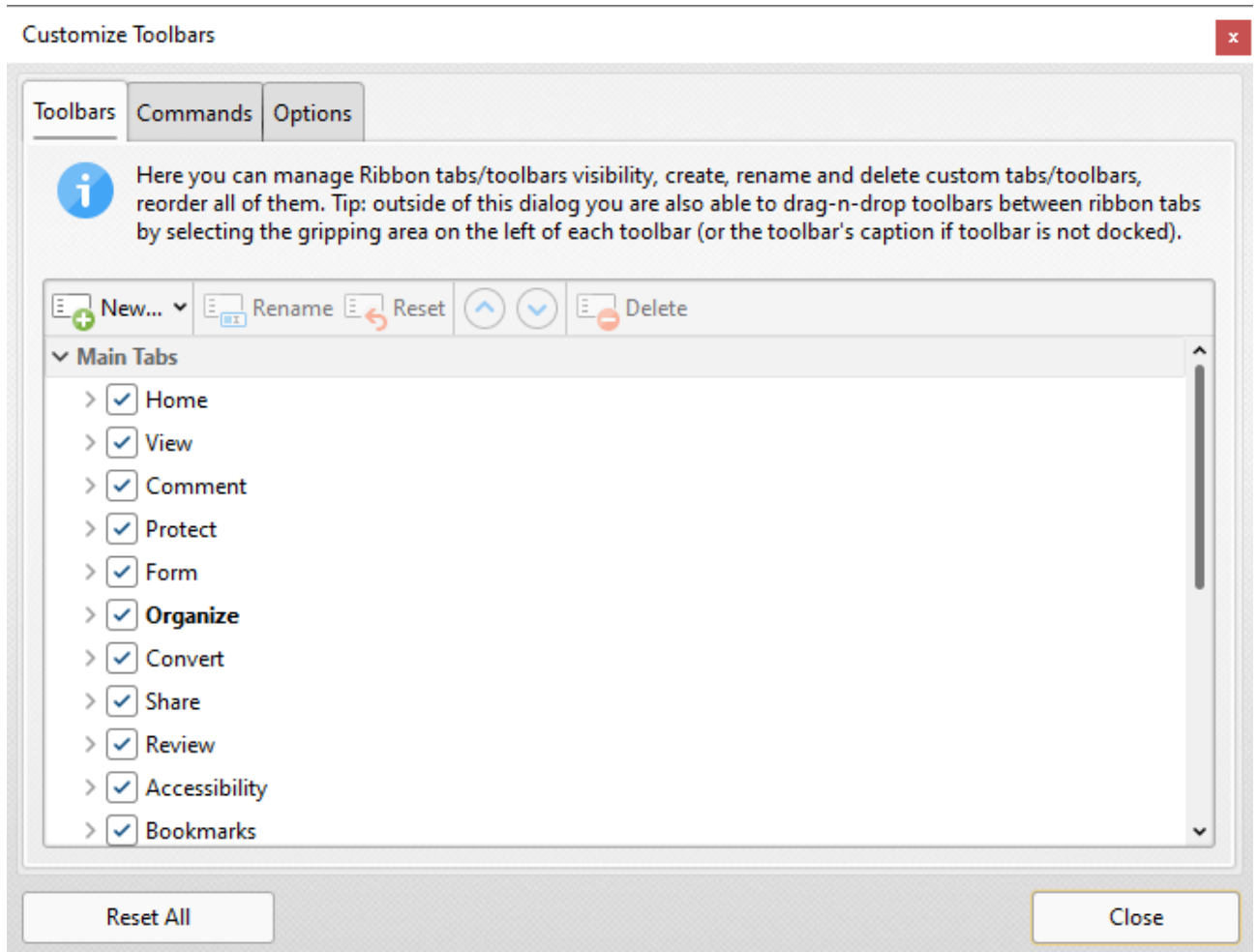
Figure 2. Customize Toolbars Dialog Box, Toolbars Tab

3. Select the desired toolbar from the list and then press Ctrl+C to copy the **Toolbar ID** to the **Windows** clipboard.

3.4.3.2.1.2 Locating the ID of Commands

 Locating the ID of Commands

There are more than 840 commands available in **PDF-XChange Editor** and the list continues to grow as we add more features and functionality to the software. The first step in customizing which of these commands are available in the toolbars is to get the unique ID for each command, which can be done following the steps detailed below.

1. Open **PDF-XChange Editor.**

2. Right-click empty space space on a toolbar and then click **Customize Toolbars:**
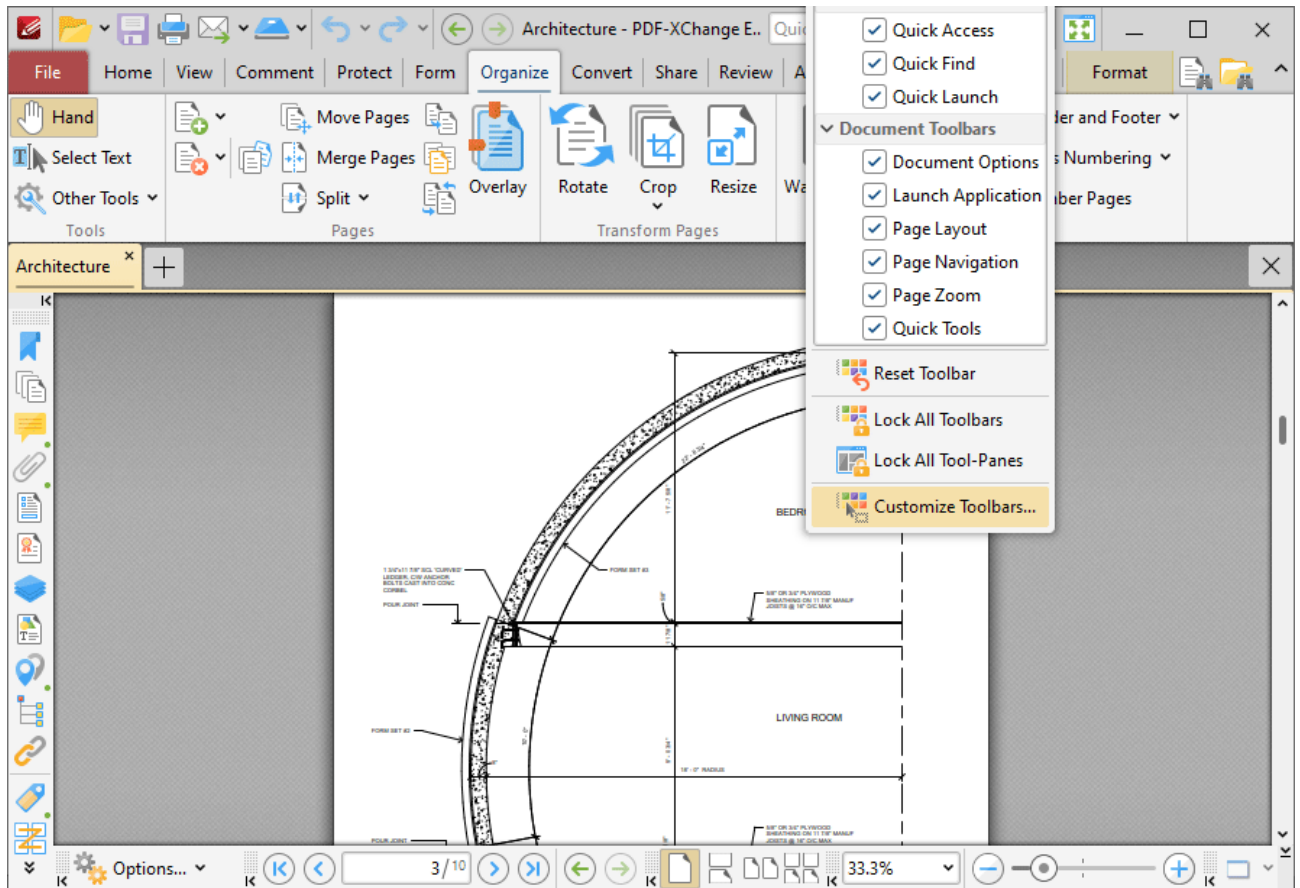
Figure 1. PDF-XChange Editor UI, Right-Click Context Menu, Customize Toolbars Selected

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

3. Click the **Commands** tab:
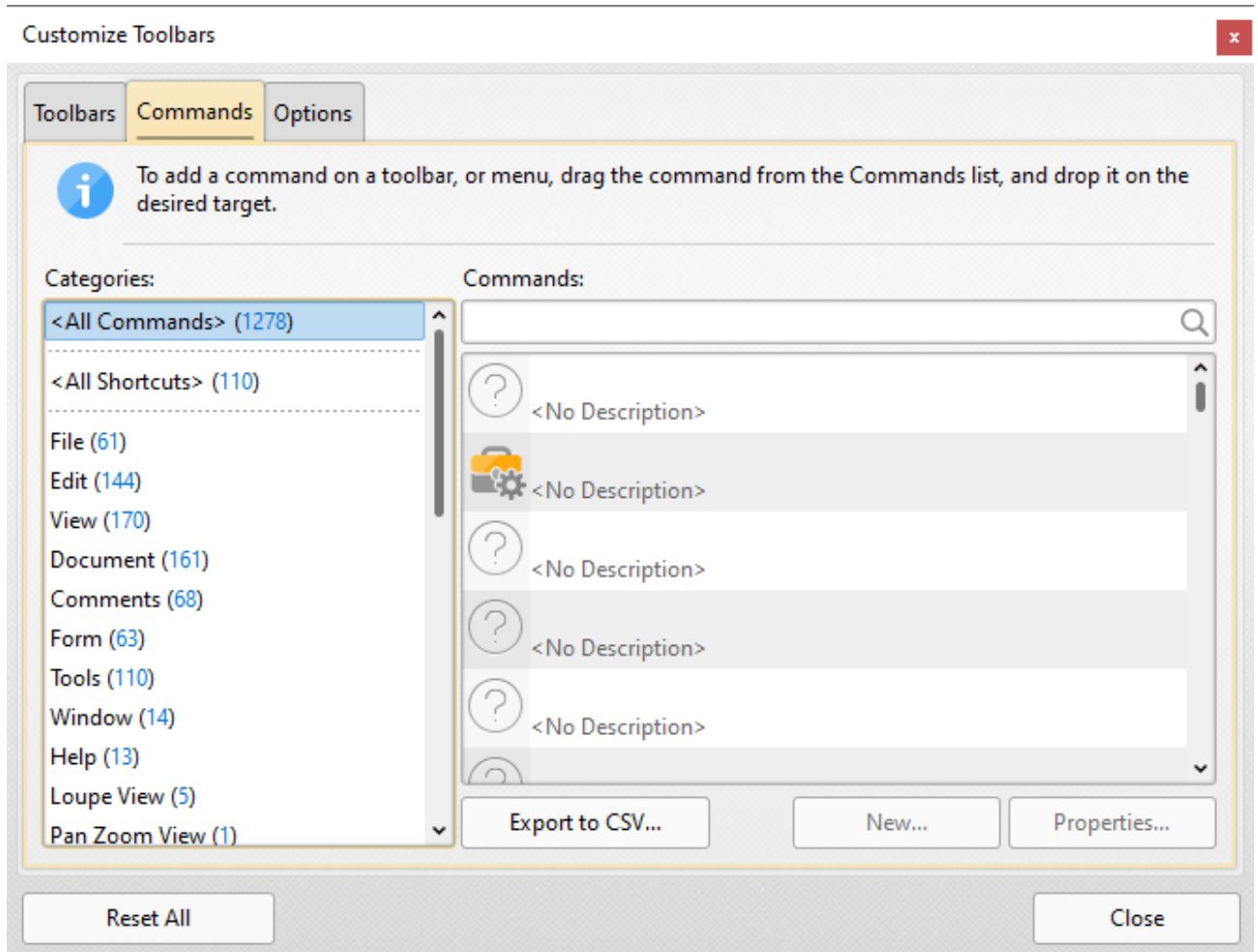
Figure 2. Customize Toolbars Dialog Box, Commands Tab

4. Use the **Commands** text box to search for the desired commands. For example, enter "pencil tool" to return the **Pencil Tool:**
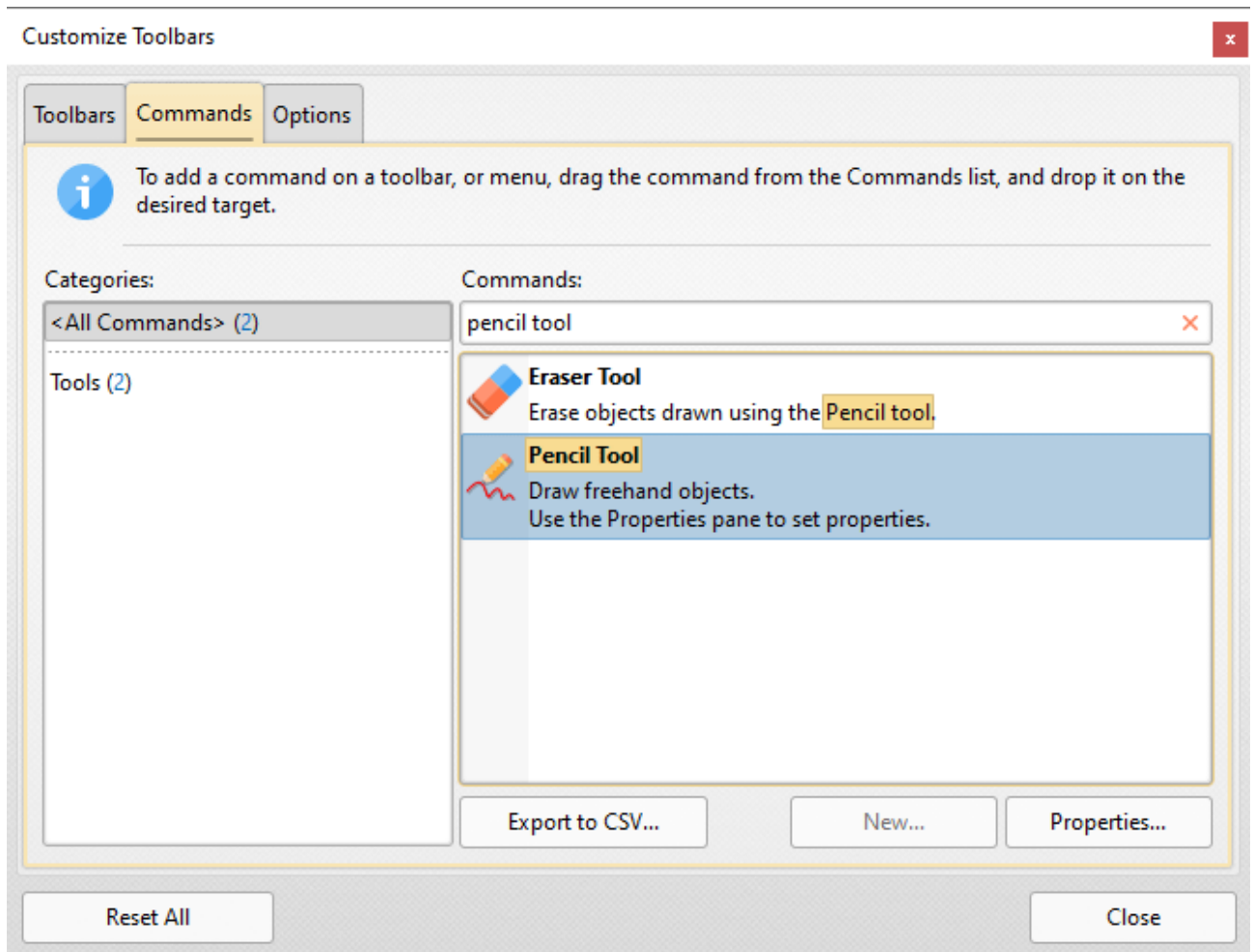
Figure 3. Customize Toolbars Dialog Box, Commands Tab, Example Search

Note that the **Eraser Tool** is also returned in this search as the text in its description contains a reference to the **Pencil Tool.**

    5. Select the desired command and then click **Properties** to view the properties of the command.

The **Command Properties** dialog box will open:
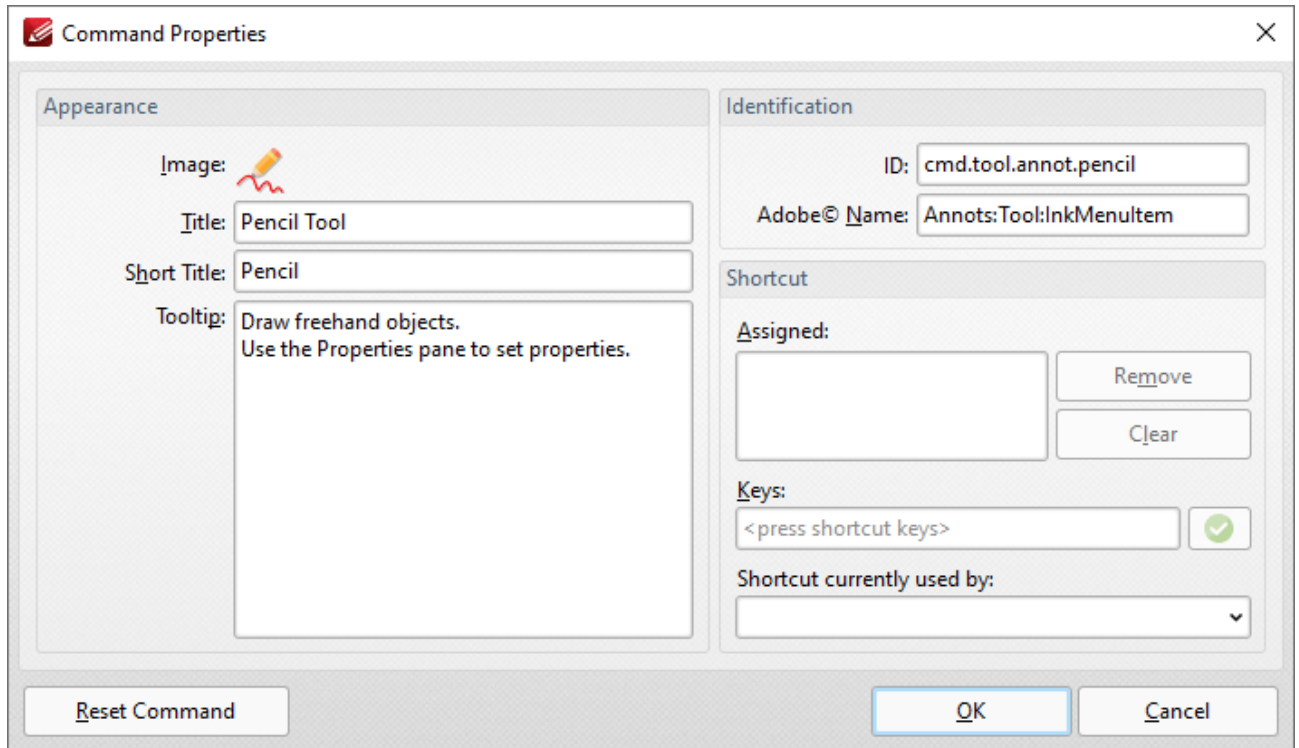
Figure 4. Command Properties Dialog Box, Pencil Tool

The ID of the command is displayed in the **ID** text box. The **ID** for the **Pencil Tool** is
"**cmd.tool.annot.pencil".**

When the ID of commands in **PDF-XChange Editor** are defined in an **Active Directory** administrative
template, the first section - **"cmd"** - of the ID can be omitted. If the pencil tool is being defined, then
the ID **"tool.annot.pencil"** is sufficient.

3.4.3.2.1.3 Hiding and Disabling Tools

Hiding and Disabling Tools

Tools can be *hidden* and/or *disabled* in **PDF-XChange Editor.** It is important to understand the differences between these options when you are customizing the UI, and how the options that you select will impact the experience of users. Hiding tools prevents them from being displayed in the UI, but it does not prevent tools from being called by other methods such as keyboard shortcuts. Disabling tools results in them not being able to be used, and they will be greyed out in the UI (although they will still show up in searches when customizing toolbars).

If you want to ensure that users can neither see nor use tools, then it is necessary to both hide and disable them.

Toolbars can also be hidden, which will hide the toolbar and the tools within it. However, the tools can still be added back by users. If you want to remove and disable a toolbar and its tools, then it's necessary to hide the toolbar and hide and disable the tools.

A simplification of the process would be:

1. **Disable the Tools.** [183]
2. **Hide the Tools.** [185]
3. **Hide the Toolbar** [186] on which the tools were located (optional).

It is necessary to use three policies from the **"Toolbars/Menu Options"** category of the **PDF-XChange Editor Adminstrative Template** [78] in order to hide and disable features. Each policy performs one of the steps outlined above:

- **Commands Availability** - enables/disables commands functionality.
- **Commands Visibility** - shows/hides command icons from the UI.
- **Toolbars Visibility** - shows/hides the toolbars on which commands icons/buttons are displayed from the UI.
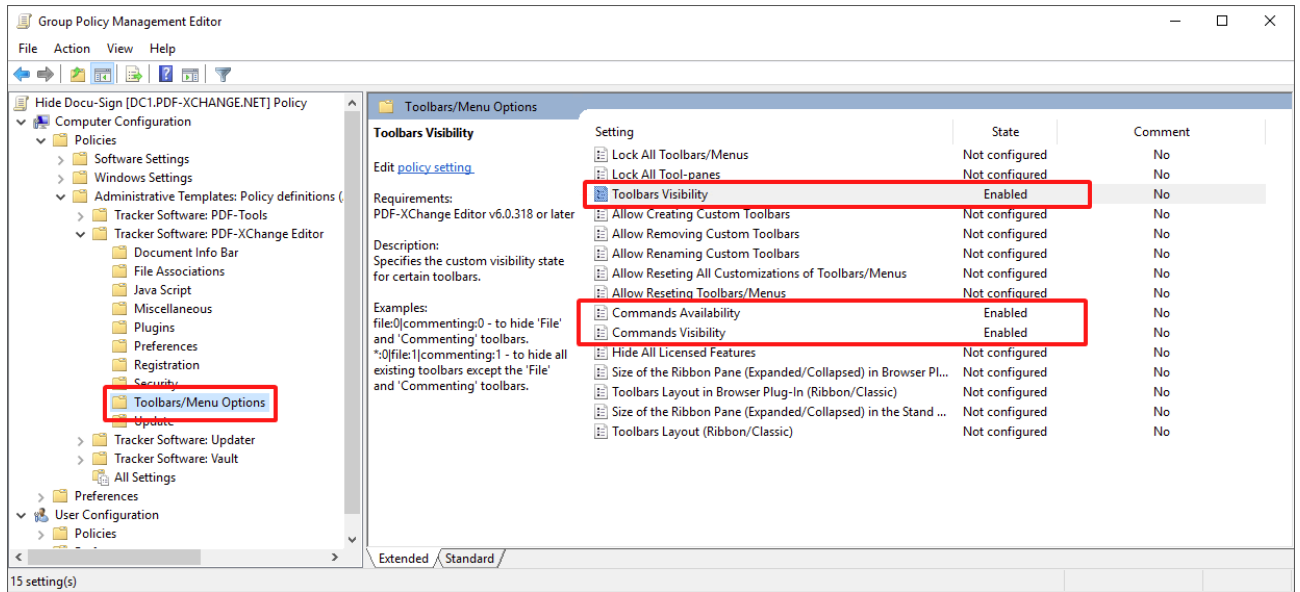
Figure 1. Toolbars/Menu Options in the PDF-XChange Editor Administrative Template

Example

The following example will detail how to hide and disable the **DocuSign** features, which are detailed in the **Protect** tab of the UI:
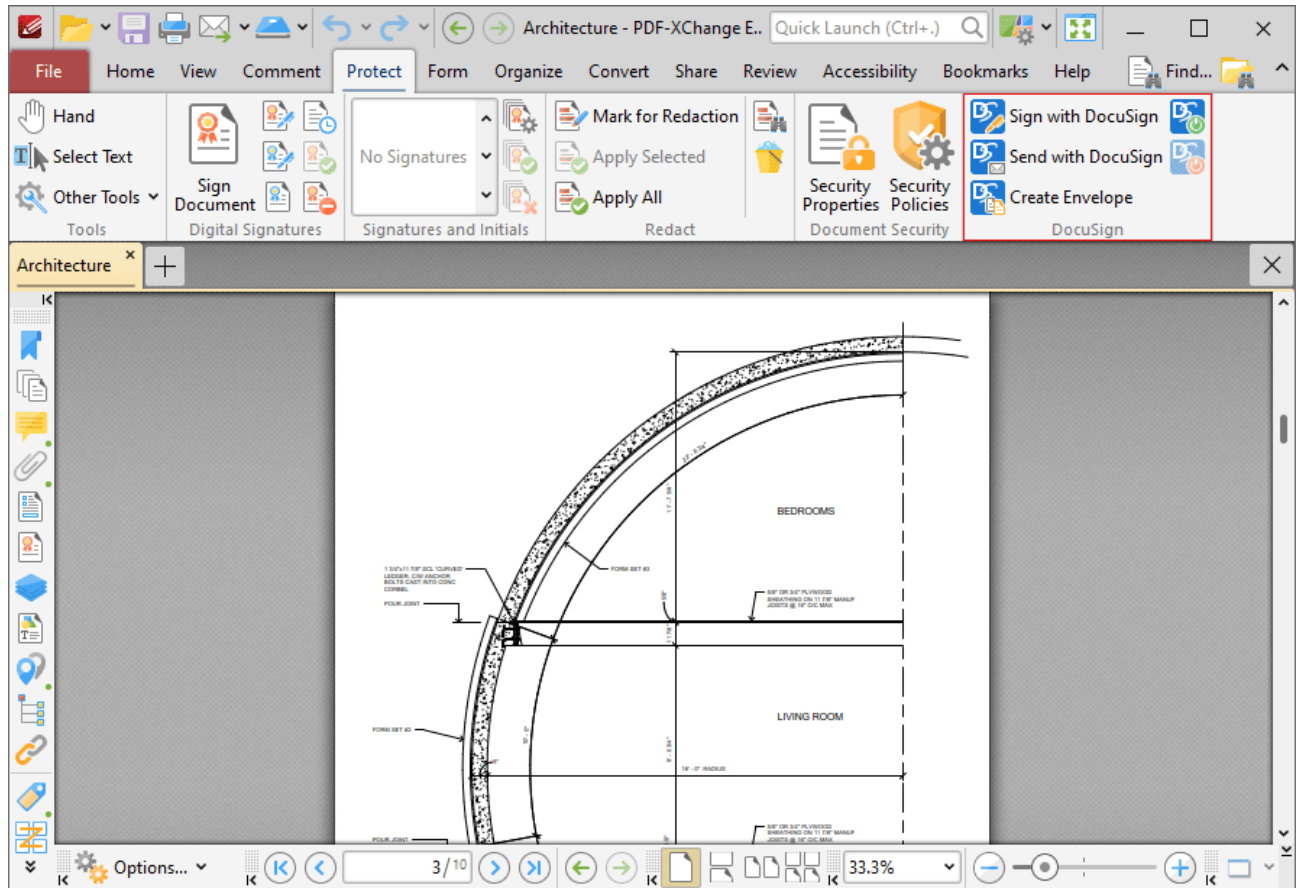
Figure 2. Protect Tab, DocuSign Features Highlighted

Note that the **DocuSign** features are located in the **Document** tab when **PDF-XChange Editor** is viewed in the classic UI:
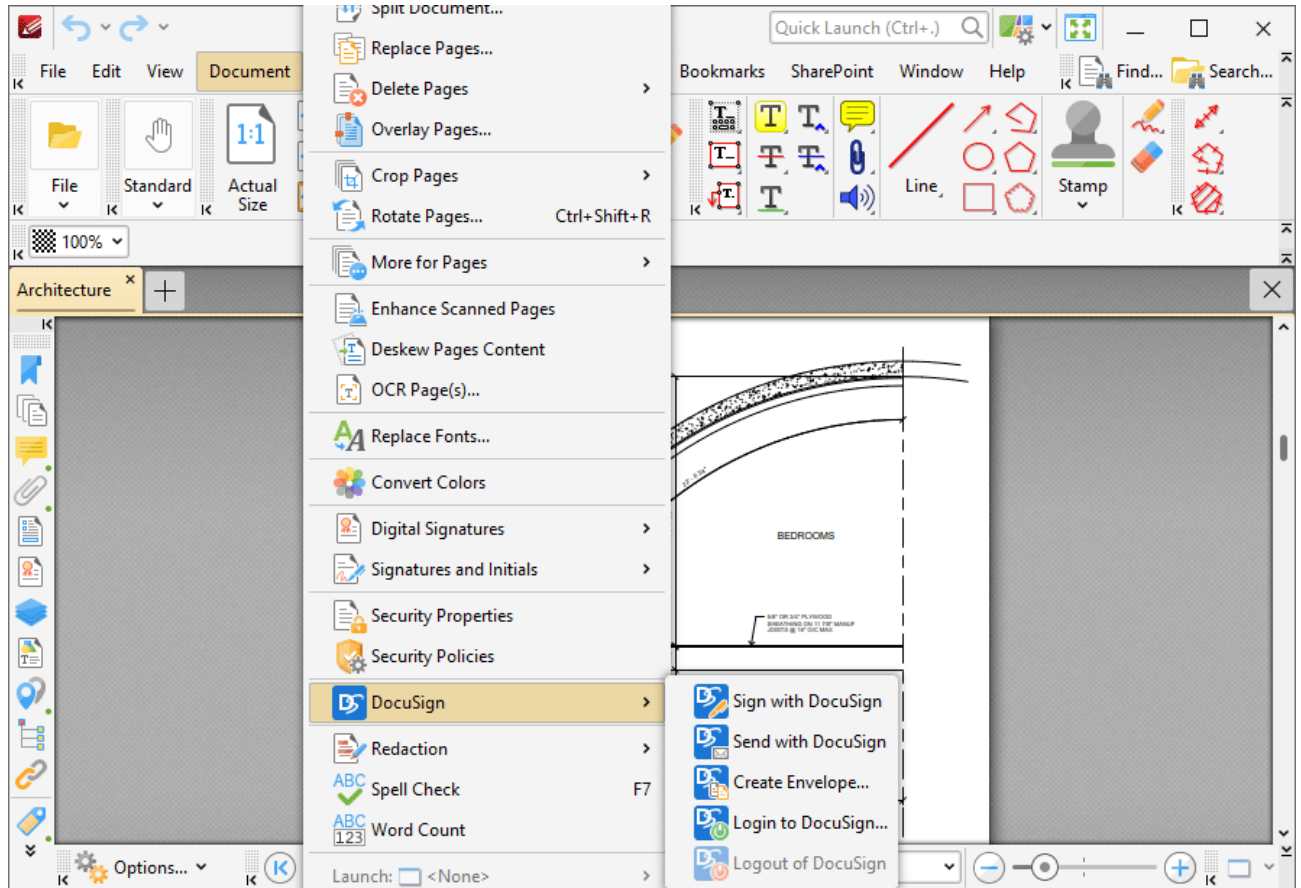
Figure 3. Classic UI, Document Tab, DocuSign Options

Disable the Tools (Commands Availability)

Double click the **"Commands Availability"** policy in the **PDF-XChange Editor** template category **"Toolbars/Menu Options"** of the Group Policy Management Editor:
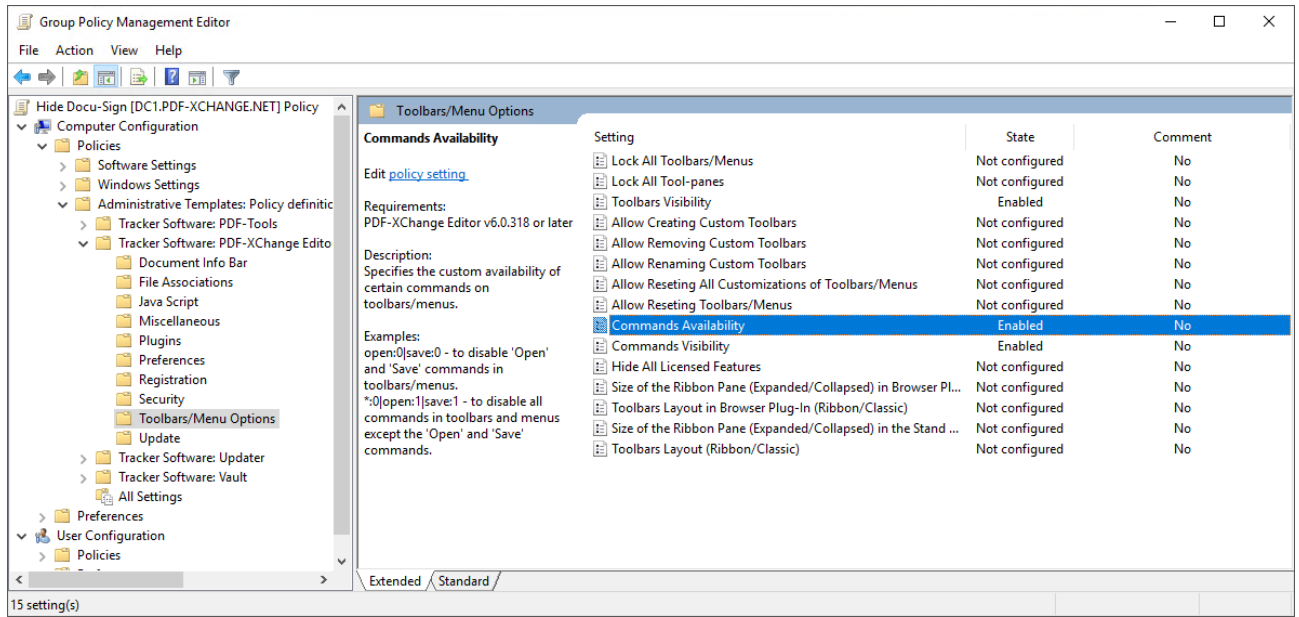
Figure 4. Group Policy Management Editor, Toolbars/Menu Options

select "Enabled", then enter the following string into the "List" field:

`docuSign:0|docuSign.createEnvelope:0|docuSign.login:0|docuSign.logout`

and click OK:
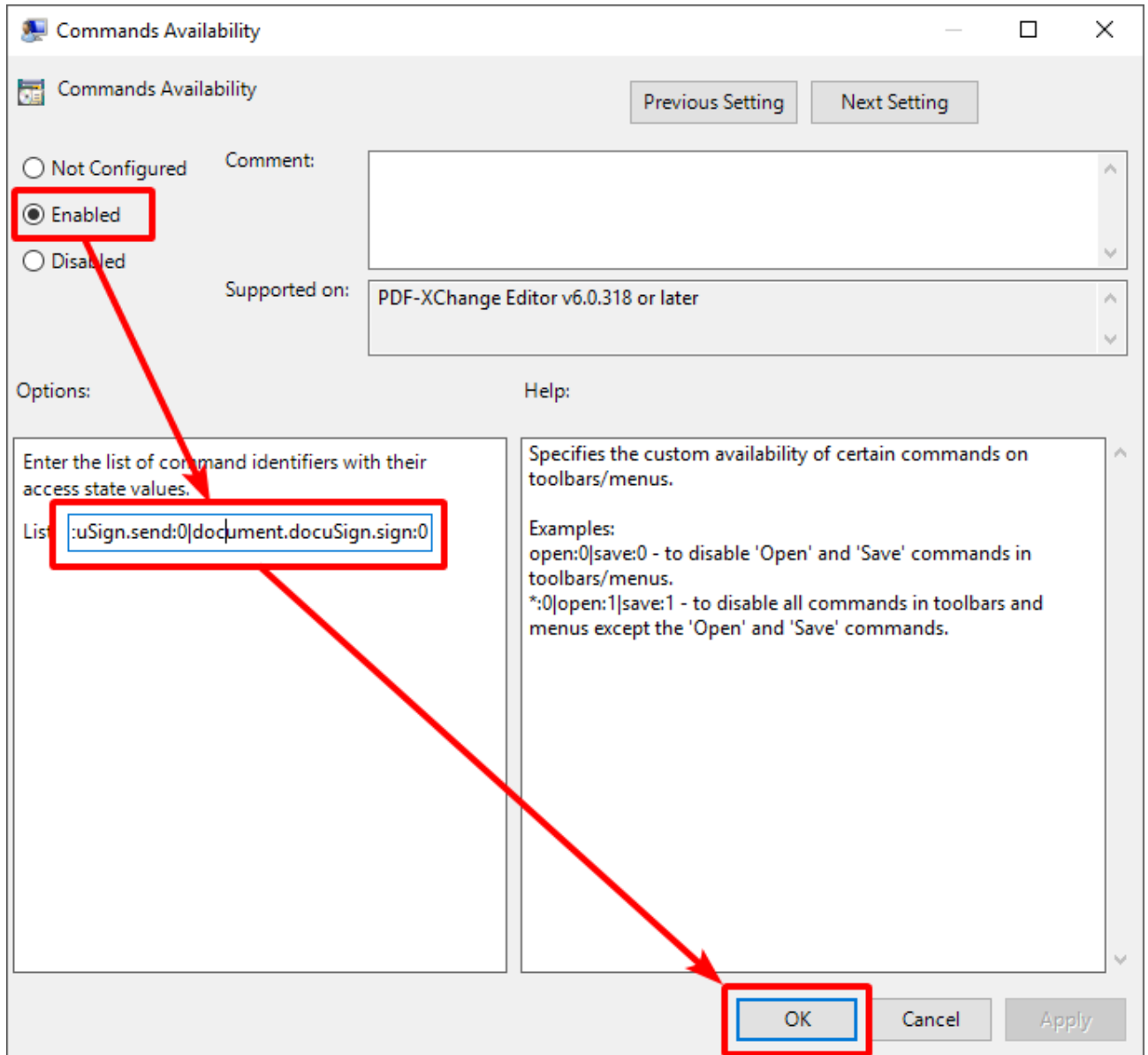
Figure 5. Commands Availability Dialog Box

See **here** 176 for how to derive the list of command names.

Hide the Tools (Commands Visibility)

Double-click the **"Commands Visibility"** policy in the **"Toolbars/Menu Options"** category of the Group Policy Management Editor, as detailed in **(figure 4)** above.

Select "Enabled", then enter this string into the "List" field:

```
docuSign:0|docuSign.createEnvelope:0|docuSign.login:0|docuSign.logout
```

and click OK:
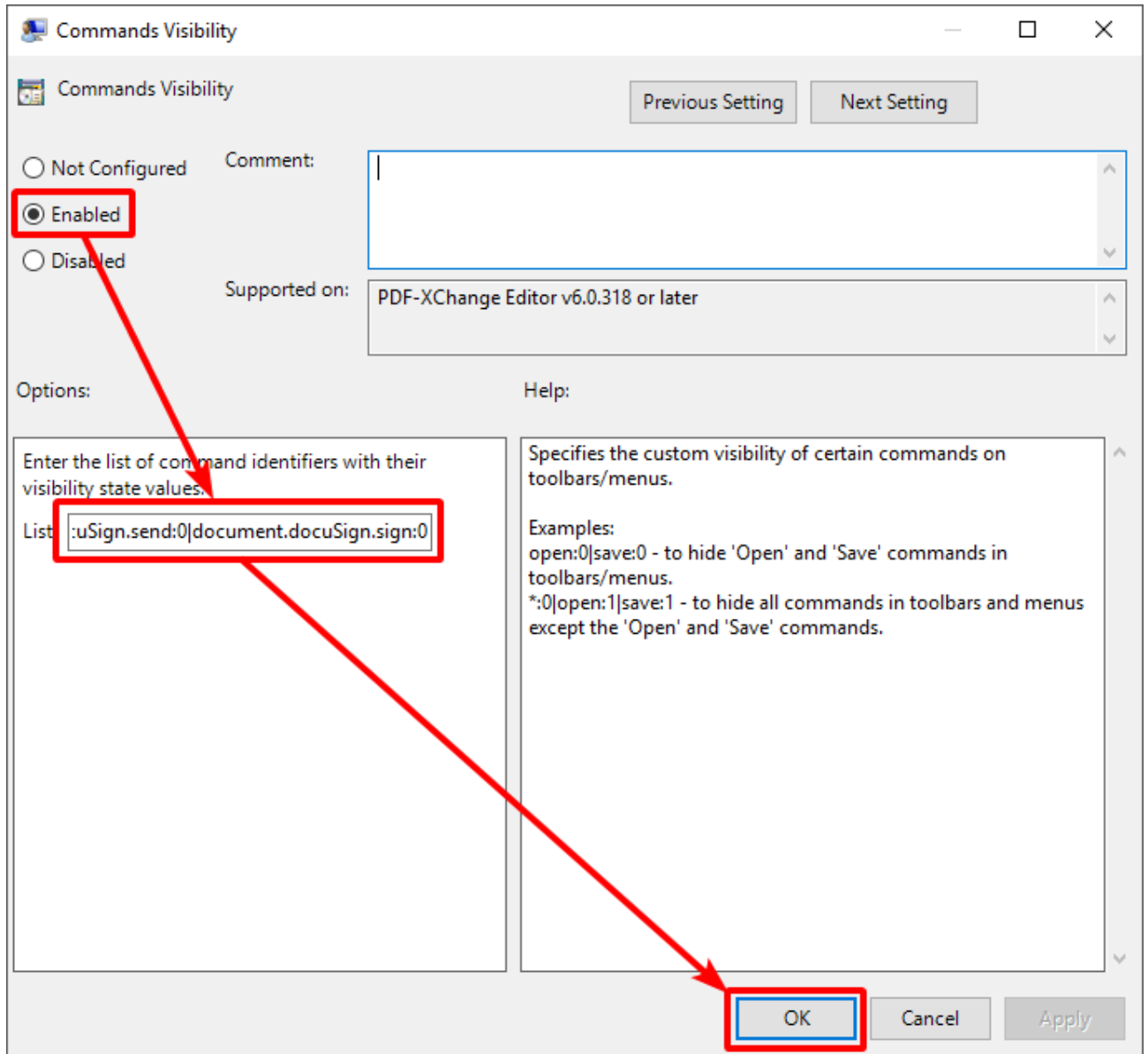
Figure 6. Commands Visibility Dialog Box

Hide the Toolbar (Toolbars Visibility)

The **Toolbars Visibility** policy toggles the display of toolbars. It does not affect the availability of the tools in the toolbar. If you want to avoid an empty toolbar appearing in the UI after you have hidden tools, then it is also necessary to hide the toolbar.
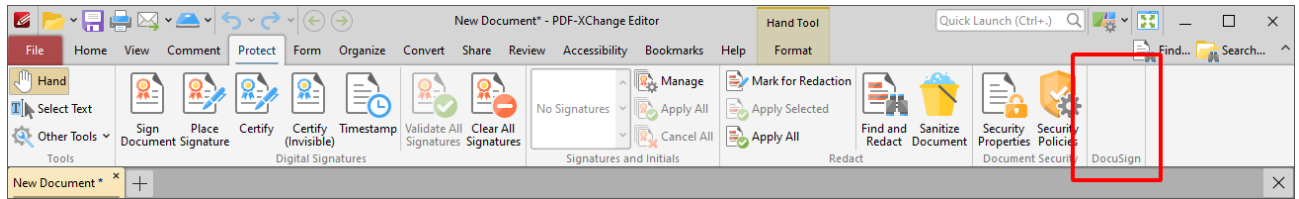
Figure 7. DocuSign Toolbar Visible, but with Features Unavailable

Double-click the **"Toolbars Visibility"** policy in the **"Toolbars/Menu Options"** category of the Group Policy Management Editor, as detailed in **(figure 4)** above.

Select "Enabled", then enter this string into the "List" field:

> `rbar.protect.docuSign:0`

and click OK:
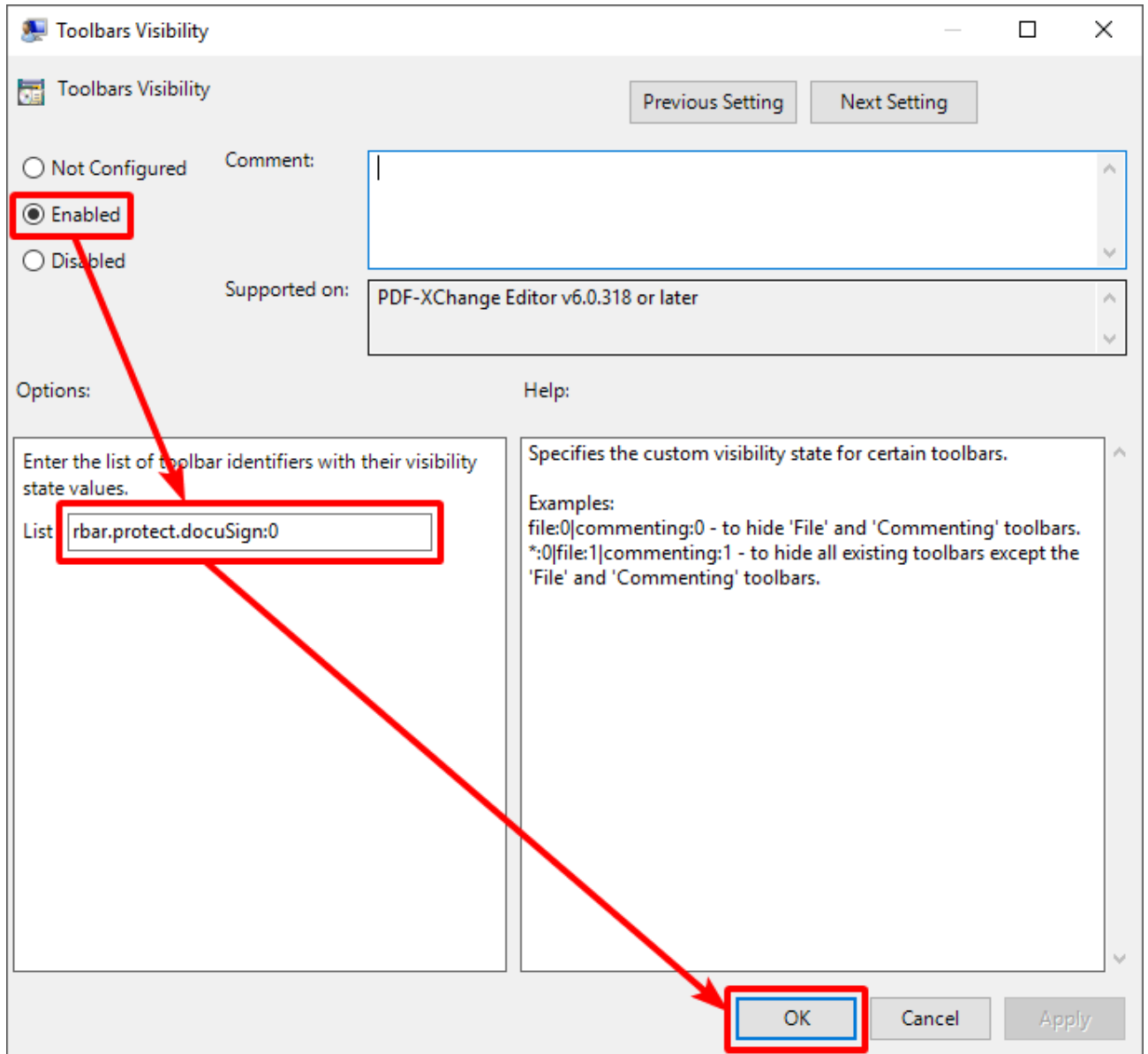
Figure 7. Toolbars Visibility Dialog Box

After a successful GPUpdate on the client, **PDF-XChange Editor** will have the **DocuSign** features both disabled and hidden:
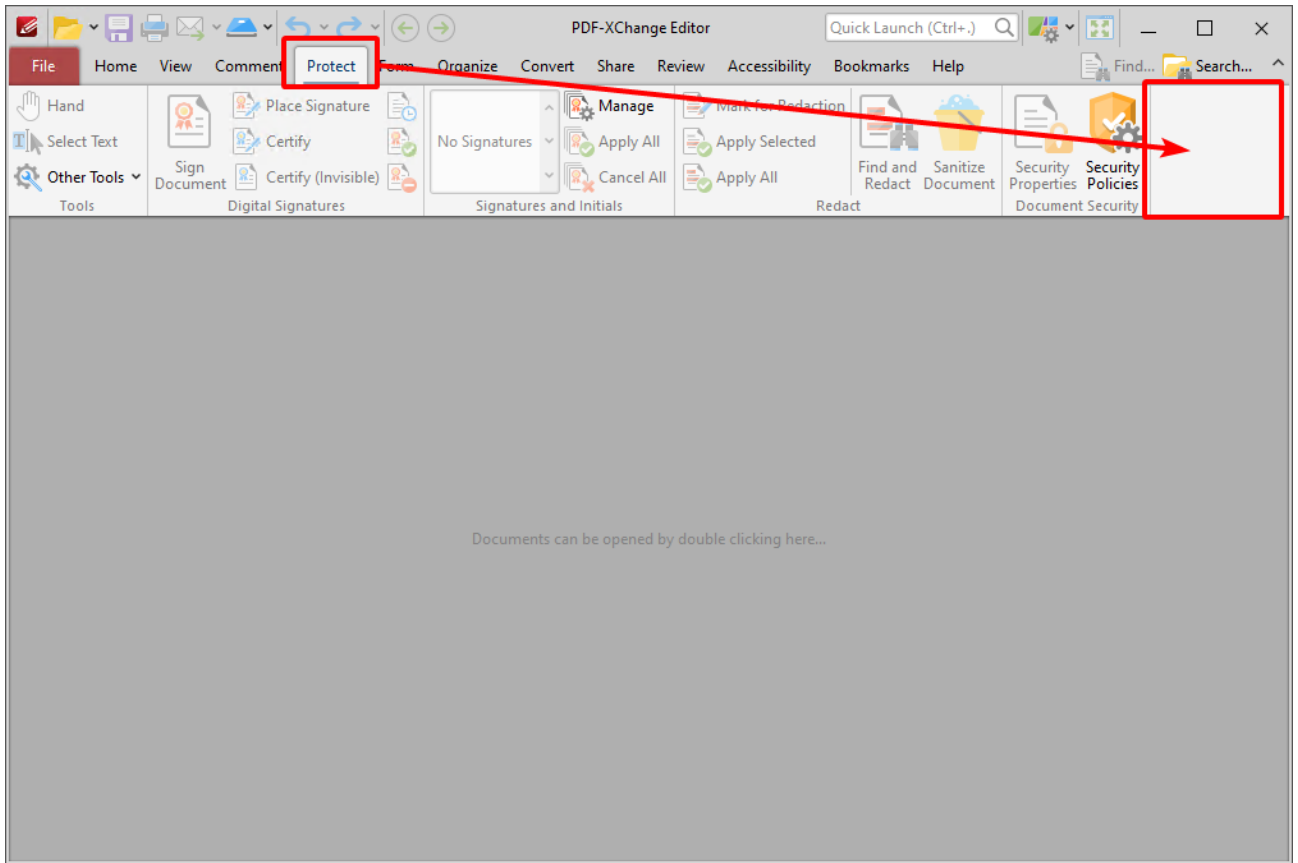
Figure 8. The Process is Complete and the DocuSign Features are both Disabled and Hidden.

3.4.3.2.2 Restrict Available Places When Using "Add a Place"

Restricting Available Places When Using "Add a Place"

'Places' in **PDF-XChange Editor** refer to user-defined locations in the **Open** and **Save** dialog boxes. Places are frequently used locations that are used to open and save documents, such as a folder on the local computer or a cloud service such as **Dropbox** or **Google Drive.** The supported cloud services in **PDF-XChange Editor** each have an associated plugin, and only places with active plugins are available when adding a new place.

When users want to add a new place to **PDF-XChange Editor,** they click the **File** tab, then click **Add a Place**:
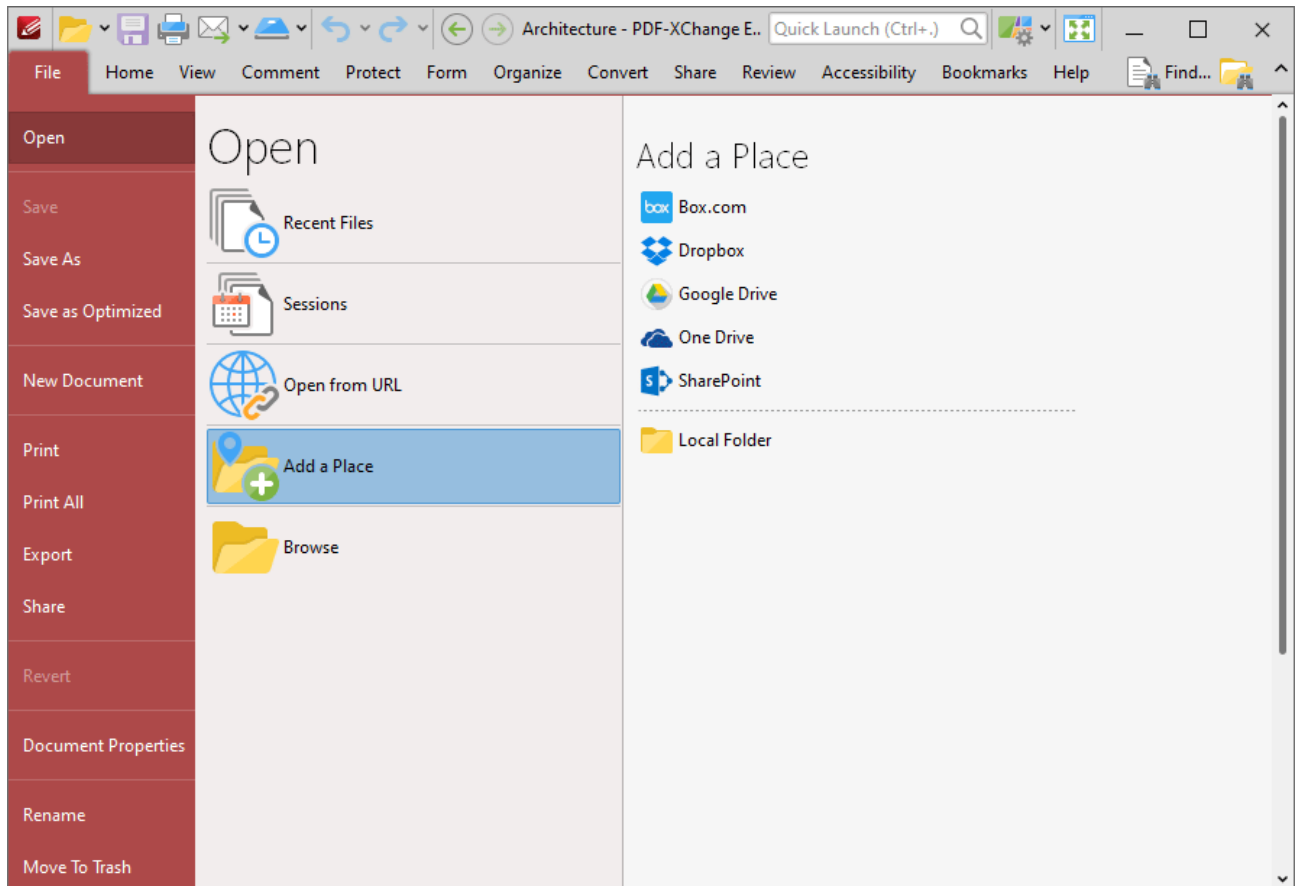
Figure 1. File Tab, Add a Place, Default Cloud Services Displayed

Plugins for places can be disabled via the preferences in the GUI of **PDF-XChange Editor.** Click **Preferences** in the **File** tab to open the preferences, then click the **Plugins** category in the list on the left:
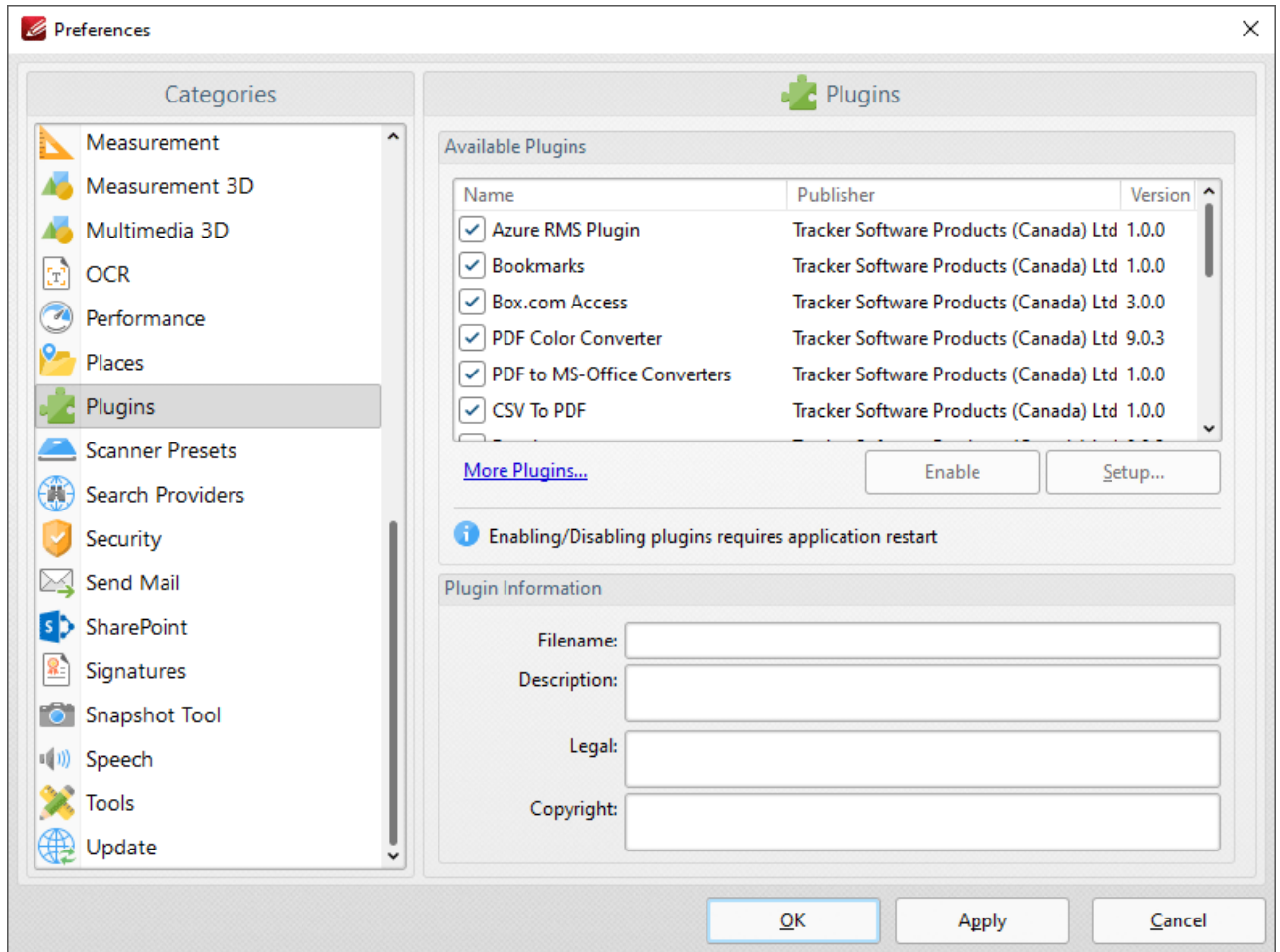
Figure 2. Preferences Dialog Box, Plugins Category Selected

Plugins for places are listed in the **Available Plugins** pane. Clear boxes to disable the associated plugin. Disabling the plugin of a cloud service completely removes the service from **PDF-XChange Editor** and it will no longer be listed in the list of available places:
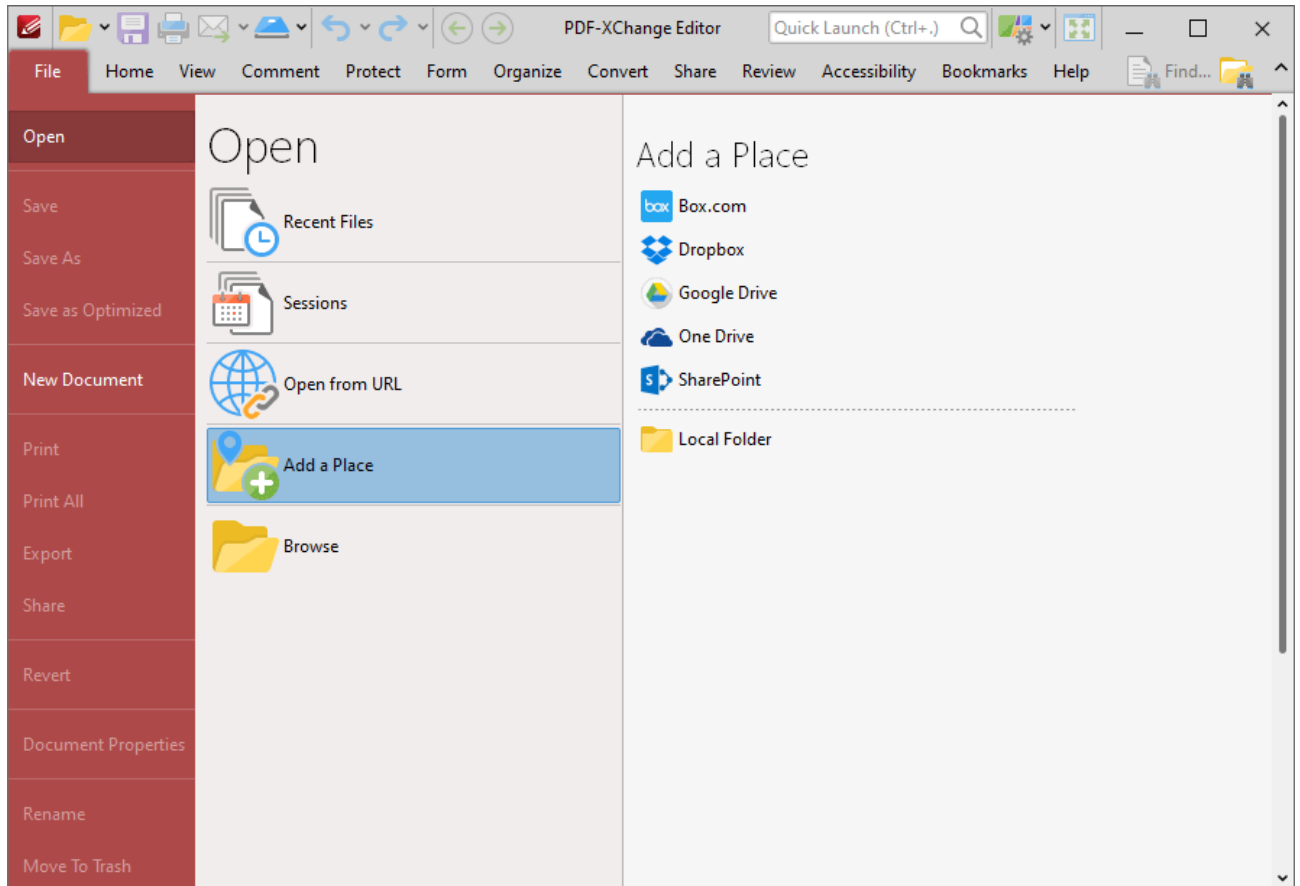
Figure 3. File Tab, Add a Place Options, All Places except SharePoint Disabled

Administrators can use the **PDF-XChange Editor** administrative template to enforce their choice of available plugins. The policy takes a list of plugins and a value for their state, with '0' meaning disabled and '1' meaning enabled. The format of the list is:

```
[plugin name]:[value]
```

and items are separated with a | (pipe) character. The default setting is to allow all plugins, which means the options for customization are either to specify a list of only the plugins you wish to disable, or to name each plugin and their desired state explicitly. Wild cards can be used with the * character.

Example

The following policy will disable the **Box.com, Dropbox, Google Drive** and **One Drive** plugins, and leave the **SharePoint** plugin enabled:

```
BoxFileSys:0|DropBox:0|GoogleDrive:0|OneDrive:0
```

This policy can be applied as follows:

1. Open the domain controller, then select the **Plugins** folder in the **PDF-XChange Editor** template.

2. Select the **"Plugins Access"** policy:
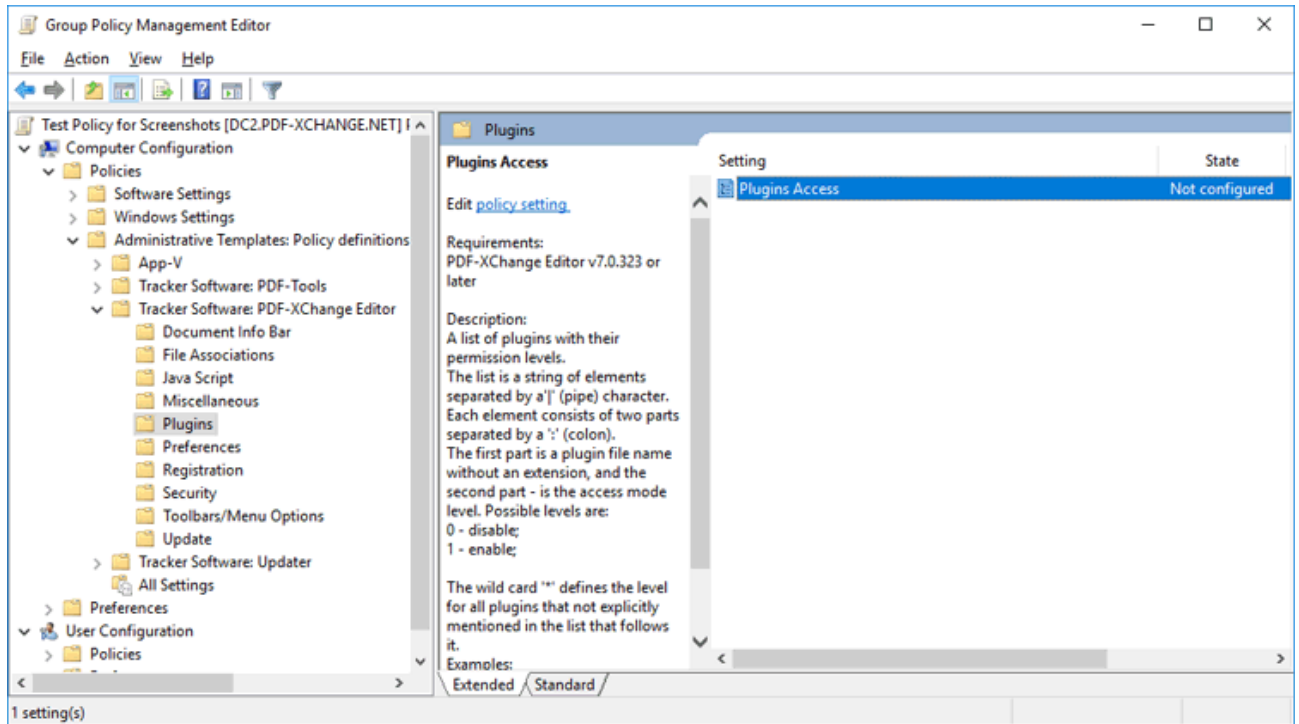
Figure 4. Group Policy Management Editor, PDF-XChange Editor Plugins

3. Enable the policy and apply the desired setup:
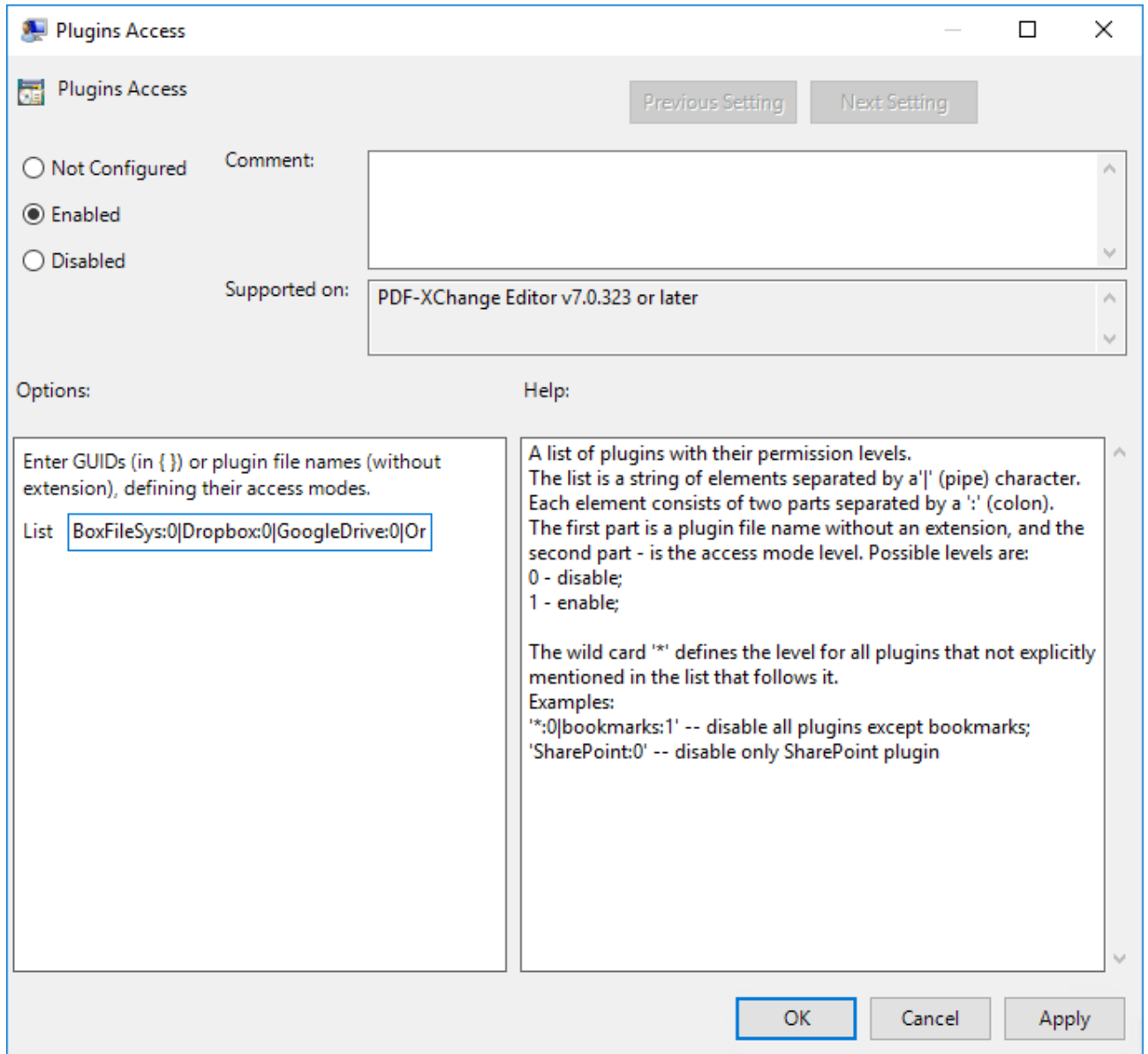
Figure 5. Plugin Access Dialog Box, Plugins Access Policy Enabled

The names of the plugins files are available in the GUI of **PDF-XChange Editor,** and can be viewed in the **Preferences** dialog box. Click **Preferences** in the **File** tab to open the preferences, then click the **Plugins** category in the list on the left. Select a plugin in the **Available Plugins** pane to view the plugin information. The plugin filename is displayed at the top:
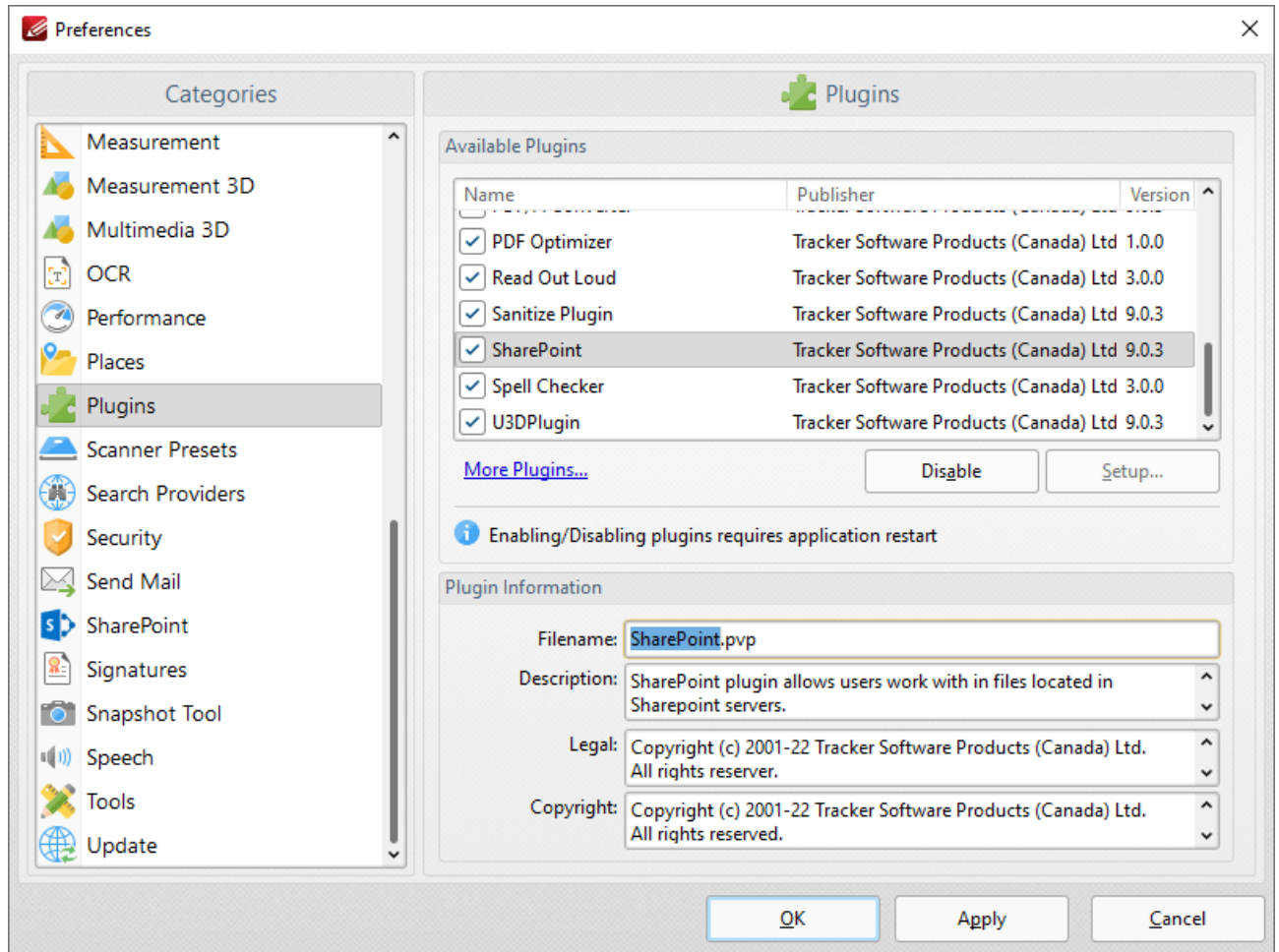
Figure 6. Preferences Dialog Box, Plugins Category Selected, Box.com SharePoint Plugin Selected

Note that the file extension should not be used in the policy, so for example the **SharePoint** plugin uses **SharePoint,** as opposed to **SharePoint.pvp**

3.4.4   Registry-Based Custom Settings

Registry-Based Custom Settings

Please note that not all customizations are supported via the administrative templates. The list of available policies is detailed **here.** [137] Some customizations can only be set via a registration key or through **PDF-XChange Editor's** GUI. When users make changes to **PDF-XChange Editor** via the GUI, the changes are saved to the registry under:

HKEY_CURRENT_USER\Software\Tracker Software

System administrators can push these reg keys directly to the users to set a value one time. As these values are stored in HKCU, users are able to change them via the **PDF-XChange Editor** GUI or through direct manipulation of the registry. This means that registry-based customizations are most useful as a one-time, initial configuration for users, or for pushing a few specific settings in cases where it is acceptable for users to deviate from them with their own preferences.

The simplest method for determining the registry key associated with a specific setting is to compare the changes to the registry before and after applying the setting. For example:

1. Use **Regedit** to export **HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0** and save it with a name such as "**before.reg**".

2. Use the **PDF-XChange Editor** UI to make a settings change. This example will use the "Restore Last Session when application starts" setting, which we will change from disabled to enabled:
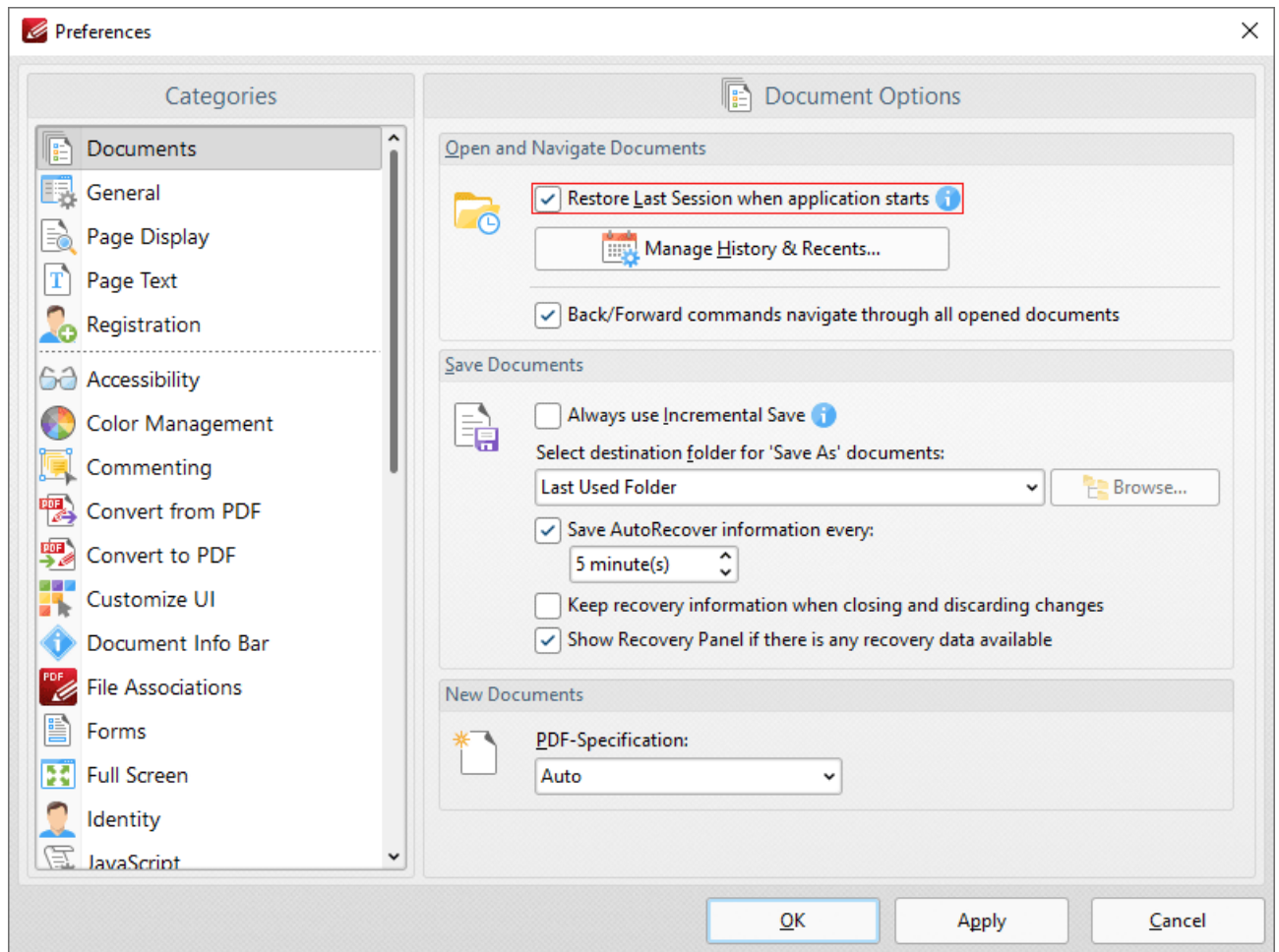
Figure 1. PDF-XChange Editor Preferences Dialog Box, Documents Category Selected

3. Click **Apply** to apply the setting, then close **PDF-XChange Editor** in order to save the preference to the registry. (Note that settings are stored in memory and only written to the registry when the program is closed).

4. Use **Regedit** to export **HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0** and save it with a name such as "**after.reg**".

5. Compare the two registration files, for example in **WinMerge:**
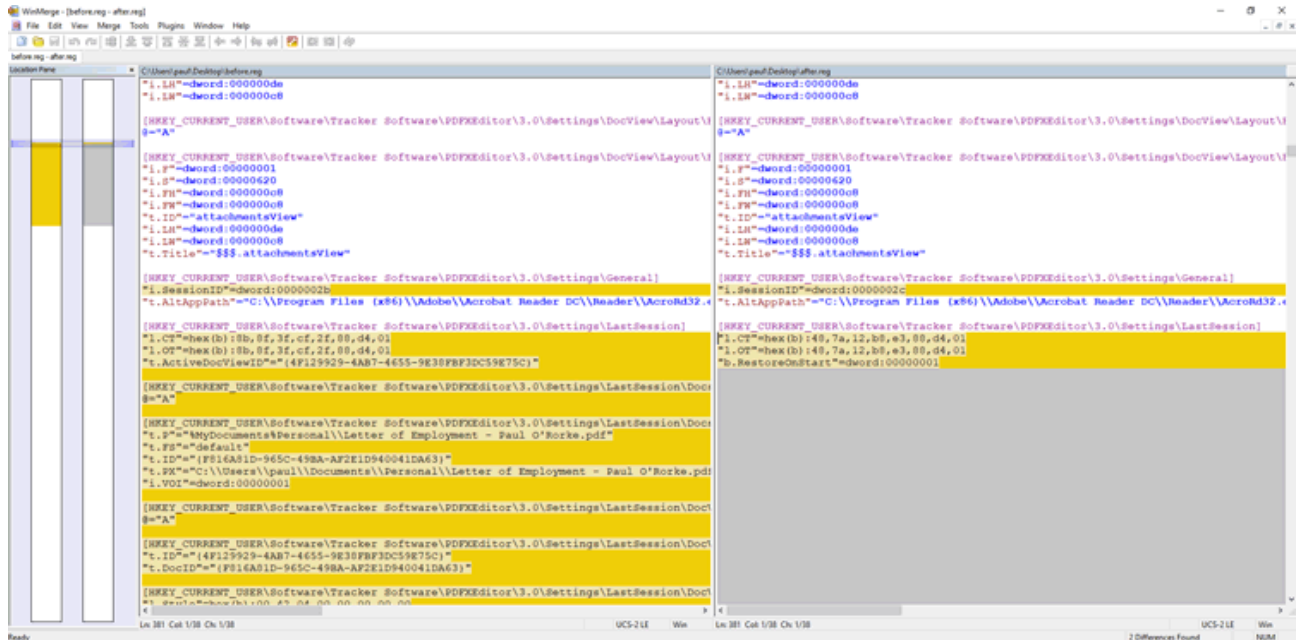
Figure 2. Registration File Comparison in WinMerge

6. Note the changes that have taken place:

```
[HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0\Settings\LastSession]
"l.CT"=hex(b):48,7a,12,b8,e3,88,d4,01
"l.OT"=hex(b):48,7a,12,b8,e3,88,d4,01
"b.RestoreOnStart"=dword:00000001
```

has replaced the previous keys for HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0\Settings\LastSession, and "b.RestoreOnStart"=dword:00000001 is the setting to enable the function used in the example.

7. Edit the entry to remove everything but the relevant key:

```
[HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0\Settings\LastSession]
"b.RestoreOnStart"=dword:00000001
```

8. Push the key to your users.

If you need assistance determining any specific key then please email **support@pdf-xchange.com**

3.4.4.1 **How to Disable the Conversion of Text to Curves When Printing**

How to Disable the Conversion of Text to Curves When Printing

The default settings of **PDF-XChange Editor** convert text to curves when documents are printed. This ensures the print job is compatible with as many printers as possible as it avoids the need for printer drivers to understand text with fonts. However, it can also significantly increase the size of print jobs. When a physical printer is used it can result in a larger than expected job on the printer spooler, and when the print job is captured and saved by a virtual printer such as **PDF-XChange Printer Standard/Lite** the output files can become quite large.

Please note that it is never advisable to print PDF documents to PDF. The process of running PDFs through the **Windows** print system results in the loss of all interactive PDF features, and can cause additional issues - therefore it should be avoided whenever possible. If it is absolutely necessary to reprint a PDF and issues with file size bloating occur, then it may be as a result of the conversion of text to curves. Follow the steps below to change the settings for text rendering:

1. Click the **File** tab, then click **Print:**
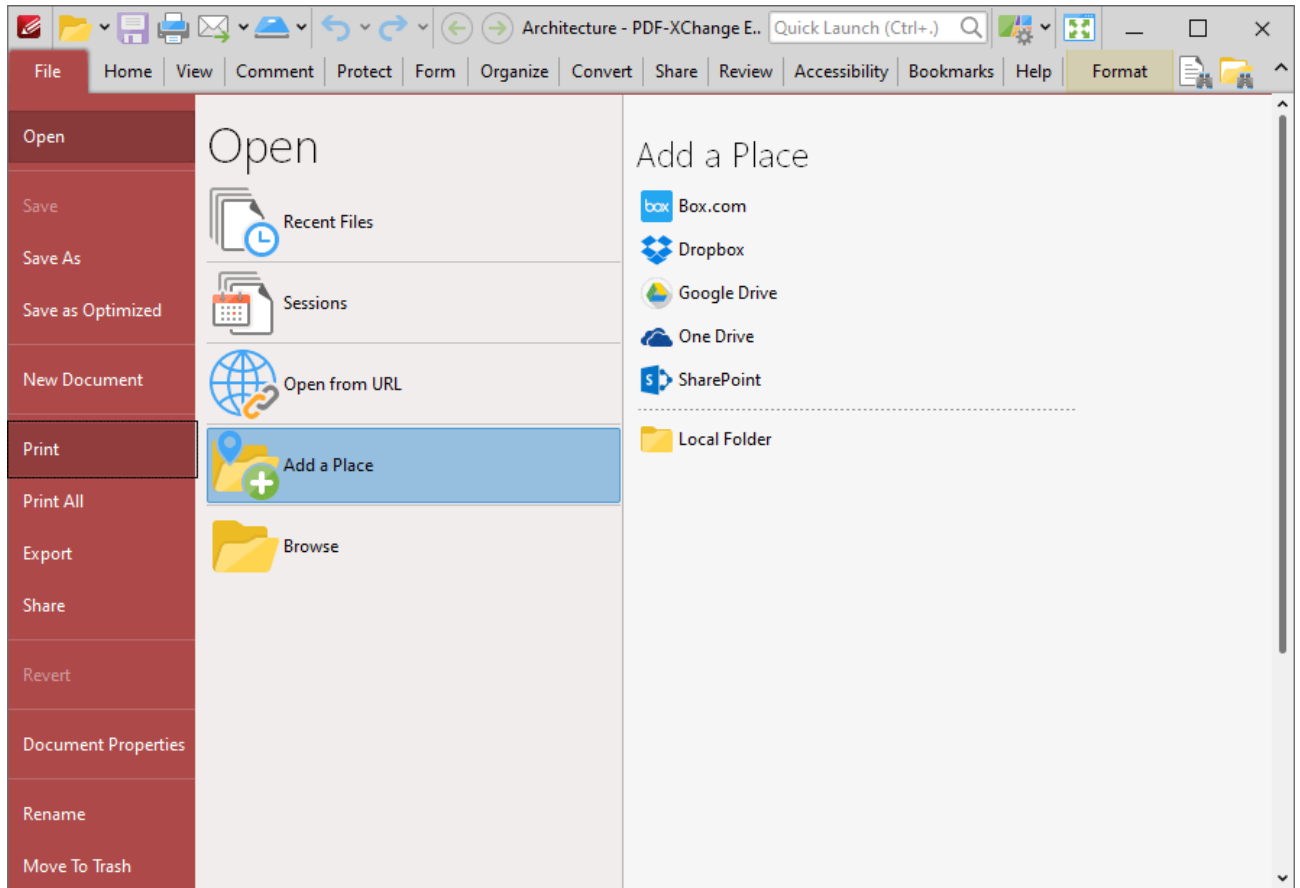
Figure 1. File Tab, Print

The **Print** dialog box will open.

2. Click the **More** button:
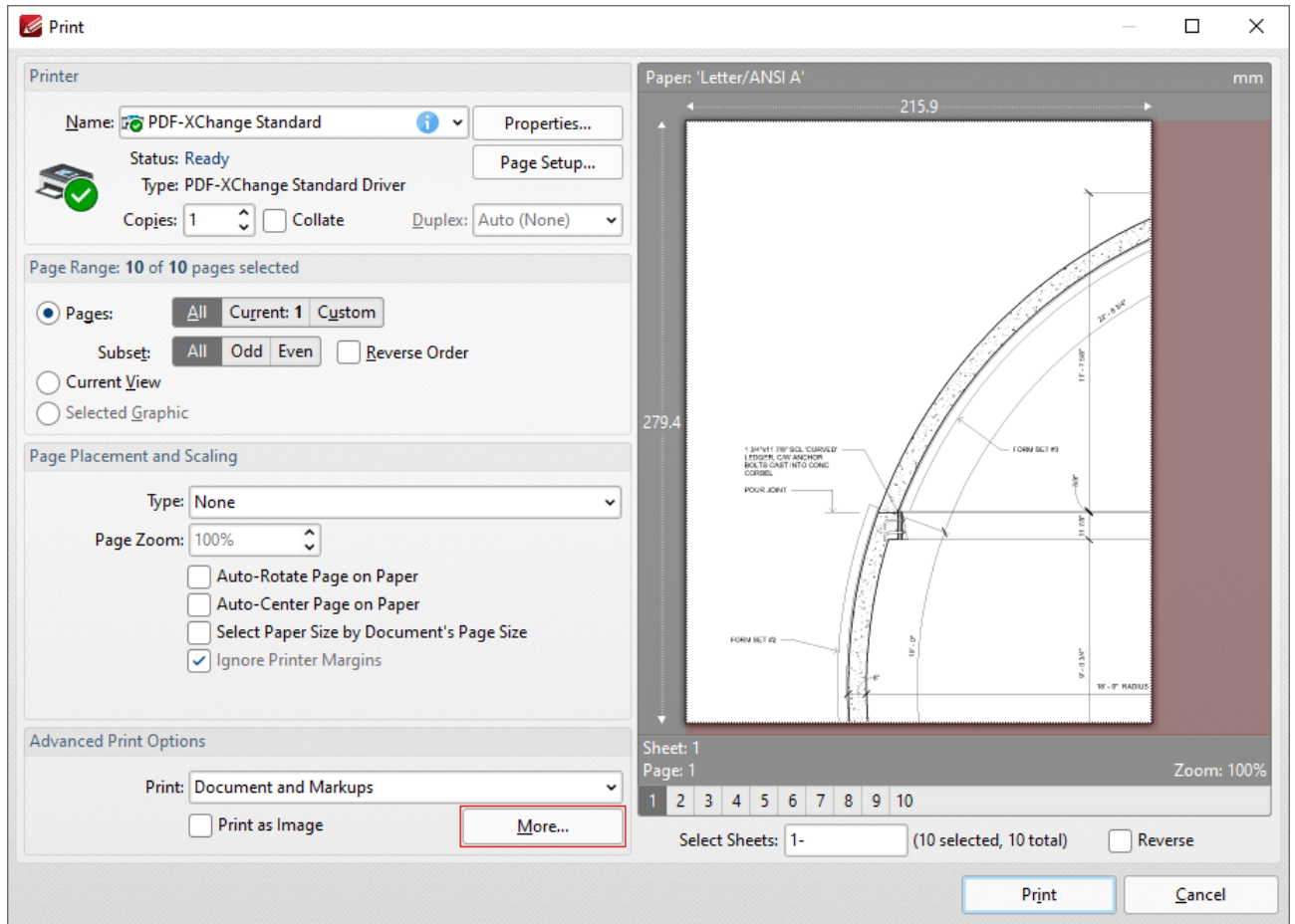
Figure 2. Print Dialog Box, More Button

The **Advanced Print Options** dialog box will open:
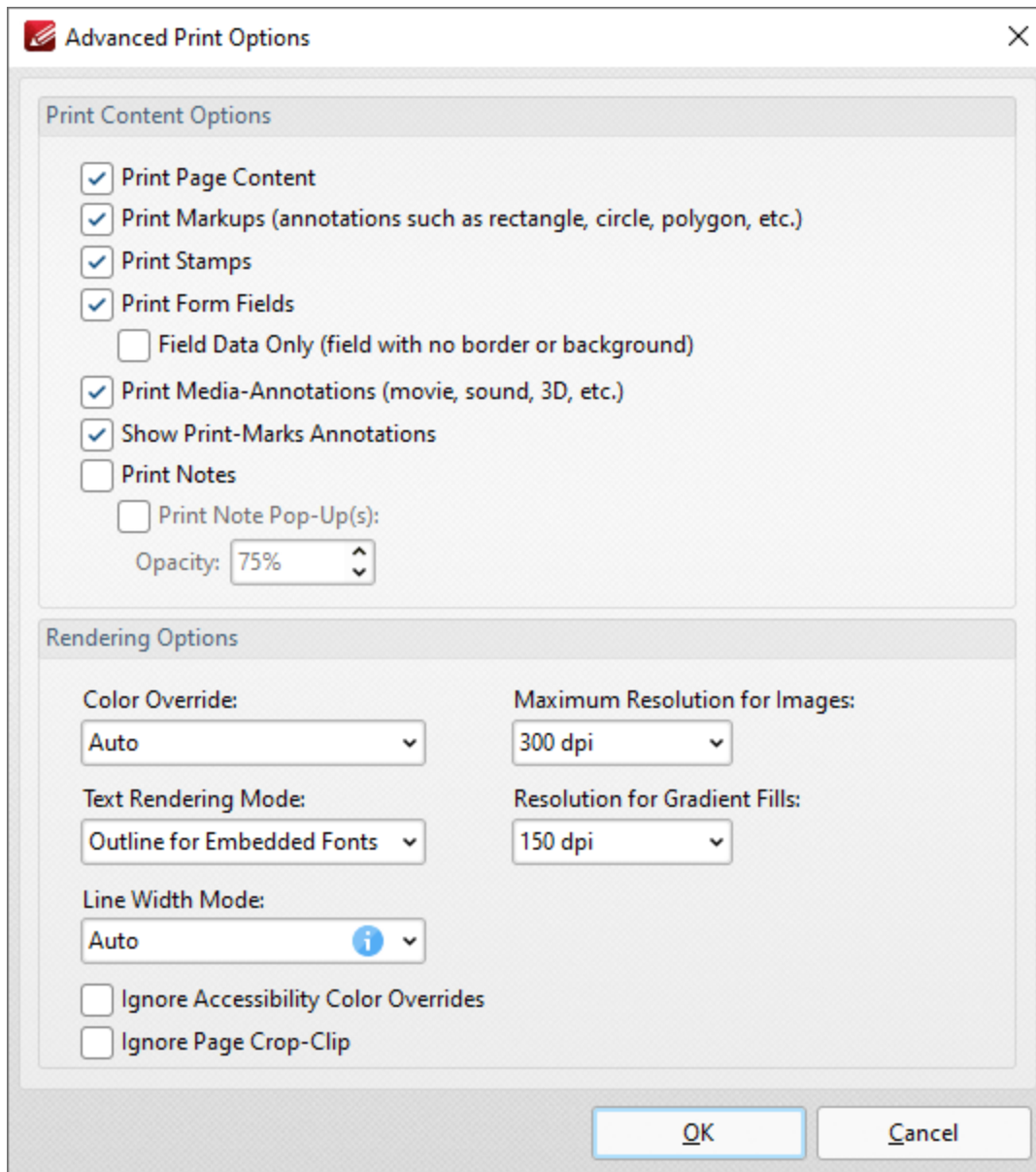
Figure 3. Advanced Print Options Dialog Box

3. Click the **Text Rendering Mode** dropdown menu, then select the **Auto** option and click **OK.**

Push the following reg key to make **Auto** the default text rendering mode for all users:

```
[HKEY_CURRENT_USER\Software\Tracker Software\PDFXEditor\3.0\Settings\Operations\PrintE
"i.TextMode"=dword:00000000
```

3.4.5   **Creating and Applying a Settings File**

Creating and Applying a Settings File

The settings in **PDF-XChange Editor** can be saved to file in order to restore saved settings subsequently, or to apply saved settings to a different installation of the product. Settings files can be used as a mechanism to apply a common set of settings to multiple machines, and also as a backup point prior to making changes to the application settings.

Creating Settings Files

1. Click the **File** tab, then click **Manage Settings.**

2. Click **Export Settings.** The **Export Settings Options** dialog box will open, as detailed below.

3. Select the settings to be exported, then click **OK.**

Settings files are saved in the **(*.xces)** format and contain user-defined preferences for the following options:
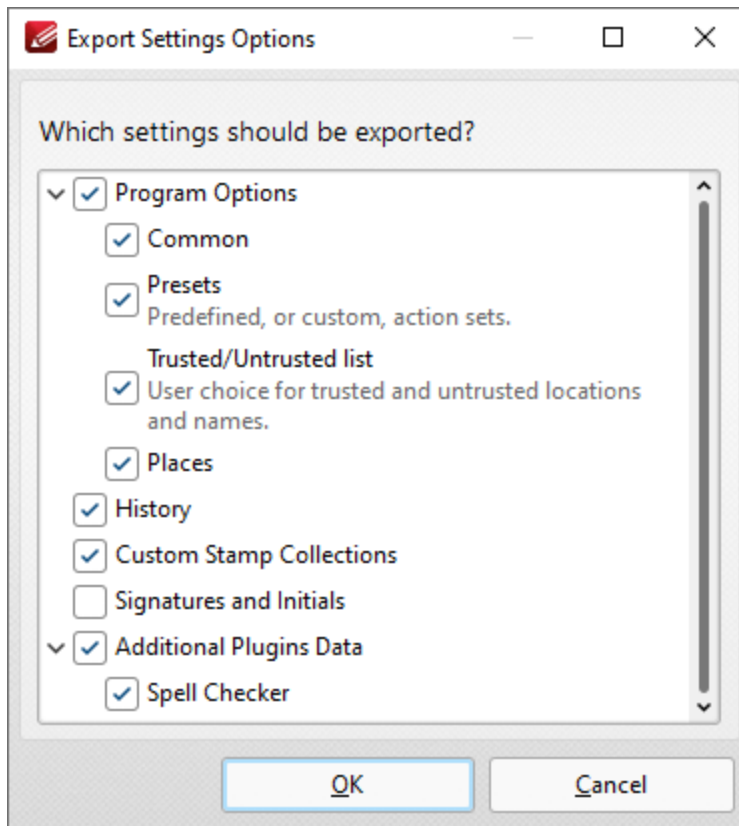
Figure 1. Export Settings Options Dialog Box

Applying a Settings File

Use the command:

```
"C:\Program Files\Tracker Software\PDF Editor\PDFXEdit.exe" /importsettings "C:\settin
```

from within a **Windows** user session to apply settings from the file **PDFXChangeEditorSettings.xces** to their installation of **PDF-XChange Editor.** For details on **/importsettings** and other **PDF-XChange Editor** command line functionality see the page of the **PDF-XChange Editor** manual located **here.** Note that settings are stored on a per-user basis and applying a settings file will overwrite the user's current settings. This process will replace all the settings for **PDF-XChange Editor** when it is next launched. However, it will not prevent users from making subsequent changes to those settings. This makes settings files a great method for having a common starting point for all users and then allowing them to explore and personalize the software to meet their own preferences. Instructions on how to enforce UI settings that users cannot change are available **here.** 171

Applying a Settings File each Time PDF-XChange Editor Launches

The **Windows File Explorer (shell)** can be modified in order to apply settings from a file each time **PDF-XChange Editor** is launched. This allows users to make changes during their session, but reverts the application to the specified settings each time it is closed and restarted. If you want to have a

settings file applied to **PDF-XChange Editor** each time it starts, then it is necessary to change the argument that **Windows** uses to launch **PDF-XChange Editor** so that it imports the settings when it opens. The following registry key can be modified in for that purpose:

```
Computer\HKEY_CLASSES_ROOT\PDFXEdit.PDF\shell\open\command
```

If you want the settings to be imported when **PDF-XChange Editor** opens, then make this value include /importsettings and the path to your settings file. Note that read-access for the current user is required. Also note that you will need to tell **PDF-XChange Editor** to open files passed to it as an argument by adding /A "%1". For example:

```
"C:\Program Files\Tracker Software\PDF Editor\PDFXEdit.exe" /importsettings "C:\settin
```
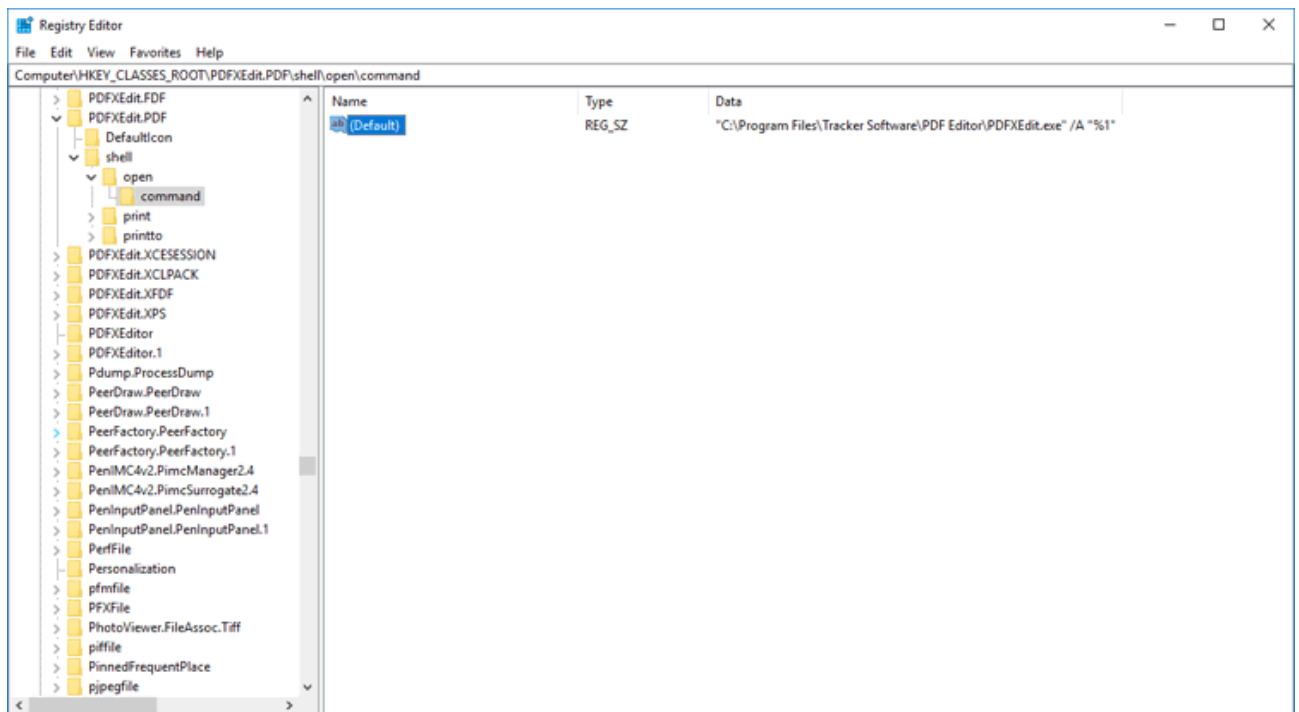

Figure 2. Windows Registry Editor, Example Registry Setting

Please note that settings files are intended to be used in order to determine a starting place that users can subsequently edit as they choose. If you want to enforce a user experience that cannot be edited, then you should apply a Group Policy via the administrative template instead, as detailed **here.**

4   **PDF-XChange Standard**

PDF-XChange Printer Standard

PDF-XChange Printer Standard

This section of the manual contains information on the **Deployment Planning, Installation, Updating** and **Customization** of **PDF-XChange Printer Standard:**

4.1   PDF-XChange Standard Deployment Planning

 Deployment Planning

The **PDF-XChange Printer Standard** virtual printer is available for installation via its own stand-alone product installer or as a component in the **PDF-XChange PRO** installers, which include it along with **PDF-XChange Editor** and **PDF-Tools.** It is important to consider the following factors before the installation of **PDF-XChange Printer Standard:**

- Are you going to install **PDF-XChange Printer Standard** via its own stand-alone product installer, or as a component of the **PDF-XChange PRO** bundle? Further information on which installer you should use is available
- Do you want to change the name of the printer installed from the default name of "**PDF-XChange Printer Standard"?**
- Do you want the printer installed to be the system default printer?
- Which language do you require for the user interface of the printer?
- What do you want to set as the default paper size and units of measurement?
- Do you want to make customized printing profiles available to users?
- Do you want to install the software updater and create a schedule for updating?

The best approach is to define the printer name, UI language, license and system default printer during installation. The default paper size, units of measurement and creation of customized profiles to make available to users is best to customize after installation. Note that a default **PDF-XChange Printer Standard** installation does not result in an application called **PDF-XChange Printer Standard** being installed or becoming available for users to launch, and nor will it result in the creation of a desktop shortcut. **PDF-XChange Printer Standard** is a virtual printer (plus some additional utilities). It is detailed in the list of **Devices and Printers/Printers & Scanners** and in **Print Management:**
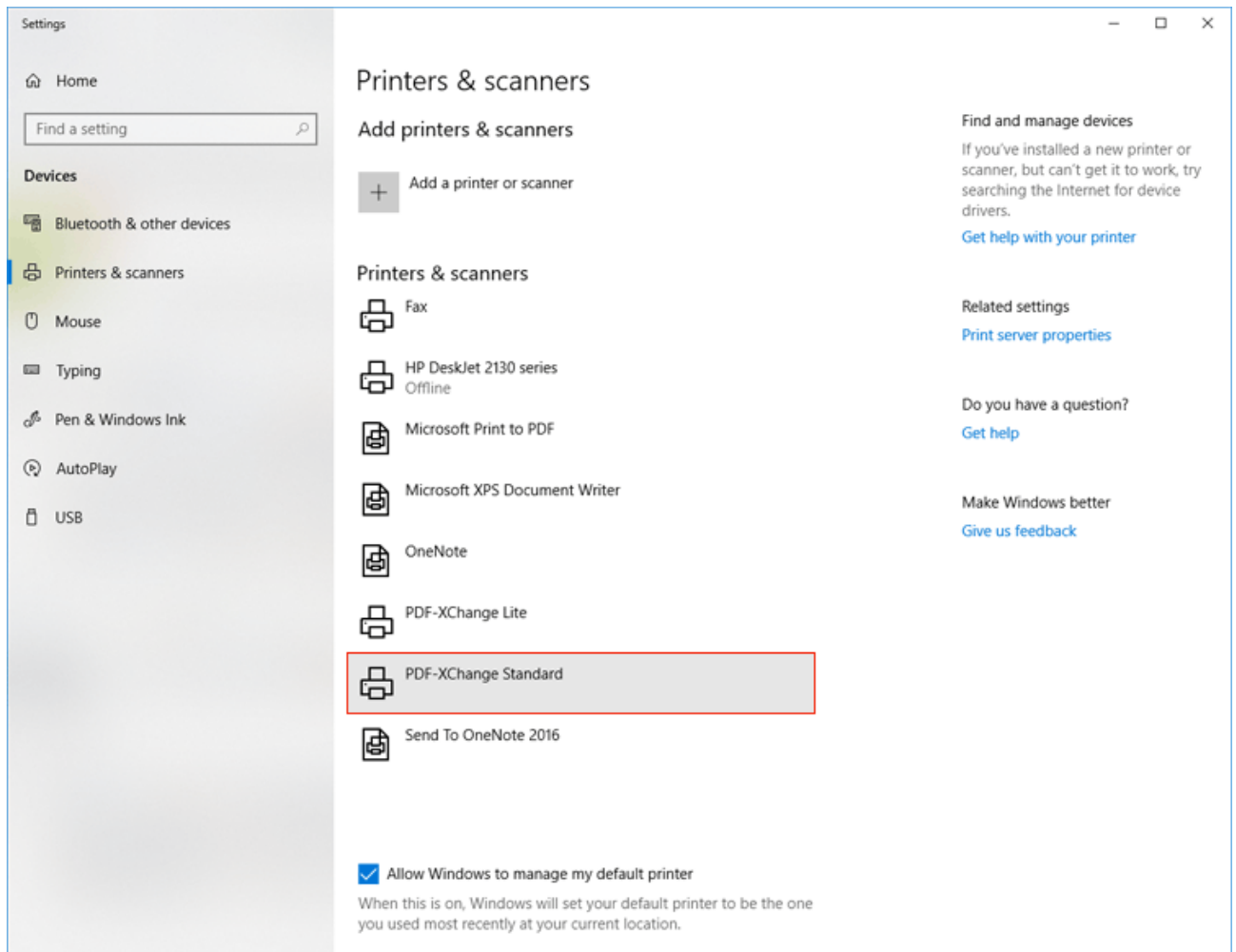
Figure 1. Printers & Scanners List, Windows 10

A default installation performs the following operations:

- Creates a new printer named **PDF-XChange Printer Standard** and adds it to your printers list in the **Windows Control Panel Devices and Printers,** application print dialog boxes and the **Print Management** .msc.
- Installs **Office2PDF** (a stand-alone application that performs unattended conversions of **Microsoft Office** files to PDF).
- Installs the **Microsoft Office Add-In** for advanced conversion of **MS Office** documents to PDF. This adds a **'PDF-XChange'** tab to **MS Office** products that contains the features and functionality of **PDF-XChange** applications and can be used directly from the user interface of **Microsoft Office** products.
- Installs **PDFSaver.exe,** a back-end management tool for **PDF-XChange Printer Standard.**

4.2 Installation

 Installation

The **PDF-XChange Printer Standard** component can be installed as a stand-alone product or as a part of the **PDF-XChange PRO** bundle. Installers for the stand-alone **PDF-XChange Printer Standard Printer** are available as either an .exe or .msi installer. Further information on the merits of each format is available **here.** 12 Note that although .exe installers are available for **PDF-XChange Printer Standard,** they are designed for single-user installations and do not utilize options or switches. This guide is intended for use with managed installations and therefore will refer only to the .msi installers.

Discrete installers for the current version of **PDF-XChange Printer Standard** are always available at:

    https://www.pdf-xchange.com/StandardV10.x64.msi
    https://www.pdf-xchange.com/StandardV10.x86.msi

The installation of a product using an .msi is achieved by passing the .msi file as a parameter (along with the desired options) to the system executable **msiexec.exe** using standard **Microsoft Syntax.** Please note the following:

- If no options are specified then the default options will be used.
- If no features are specified then all features will be installed.
- The full UNC paths to the .msi installer and any supporting files should be used.
- Product features are specified using the **ADDLOCAL** standard .msi property.
- Product properties are specified using the **Product Specific Properties.**

A comprehensive list of the **PDF-XChange Printer Standard** installer switches and their options is available **here.**

The standard options that the **PDF-XChange Printer Standard** .msi installers use enable a consistent installation experience over a range of deployment methods. The switches and options remain the same whether they are assigned/published via **GPO, SCCM** or through third-party deployment tools. They are always applied via command line switches or through the modification of the .msi - either directly or using a transform file.

4.2.1 **Switches for MSI Installers**

Switches for MSI Installers

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

If you are using an older version of the software then please refer to the relevant user manual as the available switches may be different. All user manuals are detailed **here.**

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

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

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

Syntax

<Product.msi>

/j<u|m>

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

Syntax

<Product.msi>

Parameters

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

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

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

Display Options

/quiet

This switch installs the application without user interaction.

/passive

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

/q[n|b|r|f]

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

Restart Options

/norestart

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

/promptrestart

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

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

a - start up of actions.

c - initial UI parameters.

e - all error messages.

i - status messages.

m - out of memory or fatal exit information.

o - out of disk space messages.

p - terminal properties.

r - action-specific records.

u - user requests.

v - verbose output.

w - nonfatal warnings.

x - extra debugging information.

+ - append to existing file.

! - flush each line to the log.

* - log all information except for verbose output and extra debugging information.

/log

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

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

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

Modifiers

a - forces the reinstallation of all files.

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

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

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

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

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

p - only if a file is missing.

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

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

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

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. If it is used then all required features must be specified.

Syntax

ADDLOCAL=<list of features>

Features

- **F_Drivers** - the **PDF-XChange Printer Standard** print driver and its components.
- **F_Office2PDF** - components of the **Office to PDF** feature, which enables the batch-conversion of **MS Office** documents to PDF. (This requires **F_Drivers**).
- **F_OfficeAddin** - the addin that provides extended support of **MS Office** products. (This requires **F_Drivers**).
- **F_IEAddin** - the add-in for MS Internet Explorer that facilitates the conversion of web pages to PDF format. (This requires **F_BrowserExts**).
- **F_Langs_Drv** - the files that allow the localization of **PDF-XChange Printer Standard** and its components. (This requires **F_Drivers**).
- **F_Updater** - the updater for the applications that **PDF-XChange** produce.
- **F_KeyInstaller** – the key installer for **PDF-XChange** applications.
- **F_BrowserExts** - plugin for browsers that enables the conversion of web pages into PDF files.
- **F_ChromeExt** - extension for Chrome browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).
- **F_EdgeExt** - extension for Edge browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).

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

Product Specific Properties

INSTALLLOCATION

This property specifies the folder in which products are installed.

Syntax

INSTALLLOCATION=<installation folder>

PNAME

Specifies the printer name. The default value is **"PDF-XChange Printer Standard."**

Syntax

PNAME=<printer name>

SET_PRINTER_AS_DEFAULT

If this property is not specified, or specified with a value of "1", then **PDF-XChange Printer Standard** will be set as the default printer.

Syntax

SET_PRINTER_AS_DEFAULT="0"

DESKTOP_SHORTCUTS

If this property is not specified, or specified with a value of "1", then the installer will place shortcuts on the desktop for installed applications.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

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

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

This property specifies a language for the **PDF-XChange Printer Standard** print driver. (This requires **F_Langs_Drv** 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.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

NOUPDATER

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

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

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

Syntax

SCHEDULEUPDATER=<0>

MSI Installer Examples

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

  ```
  msiexec /i StandardV10.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 StandardV10.x64.msi /quiet USERNAME="John Doe"
  USERMAIL="abc@a.b.c" KEYFILE="\UNC\path\to\xcvaultfile"
  ```

- Install only **PDF-XChange Printer Standard** and the updater:

  ```
  msiexec /i StandardV10.x64.msi /quiet ADDLOCAL="F_Drivers,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 StandardV10.x64.msi /qb APP_LANG=de-DE
  ```

4.2.2   **Switches for EXE Installers**

Switches for EXE Installers

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

The command line for installation is **PDFXStd9.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

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

Install Options

/install

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

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

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

Display Options

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

/quiet

This switch installs the application without user interaction.

/passive

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

Restart Options

/norestart

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

Logging Options

/log

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

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

APP_LANG

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

Syntax

APP_LANG=<id>

SET_AS_DEFAULT

If this property is not specified, or is specified with a value of "1", then **PDF-XChange Printer Standard** will be set as the default application for printing PDF files.

Syntax

SET_AS_DEFAULT="0"

DESKTOP_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

NOUPDATER

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

Syntax

NOUPDATER="0"

SCHEDULE UPDATER

If not specified, or specified with a value of "1", then the installer will create a **Windows Schedule Task** to check for updates once a fortnight.

Syntax

SCHEDULEUPDATER=<0>

EXE Installer Examples

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

  ```
  PDFXStd.exe / quiet
  ```

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

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

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

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

4.3   Updating

 Updating

The best way to update **PDF-XChange Printer Standard** is to use the **PDF-XChange Updater,** as detailed **here.**

It is also possible to check for updates via the printing preferences of **PDF-XChange Printer Standard.** The **Check for Updates** option is available in the **Help** dropdown menu of the **About** tab:
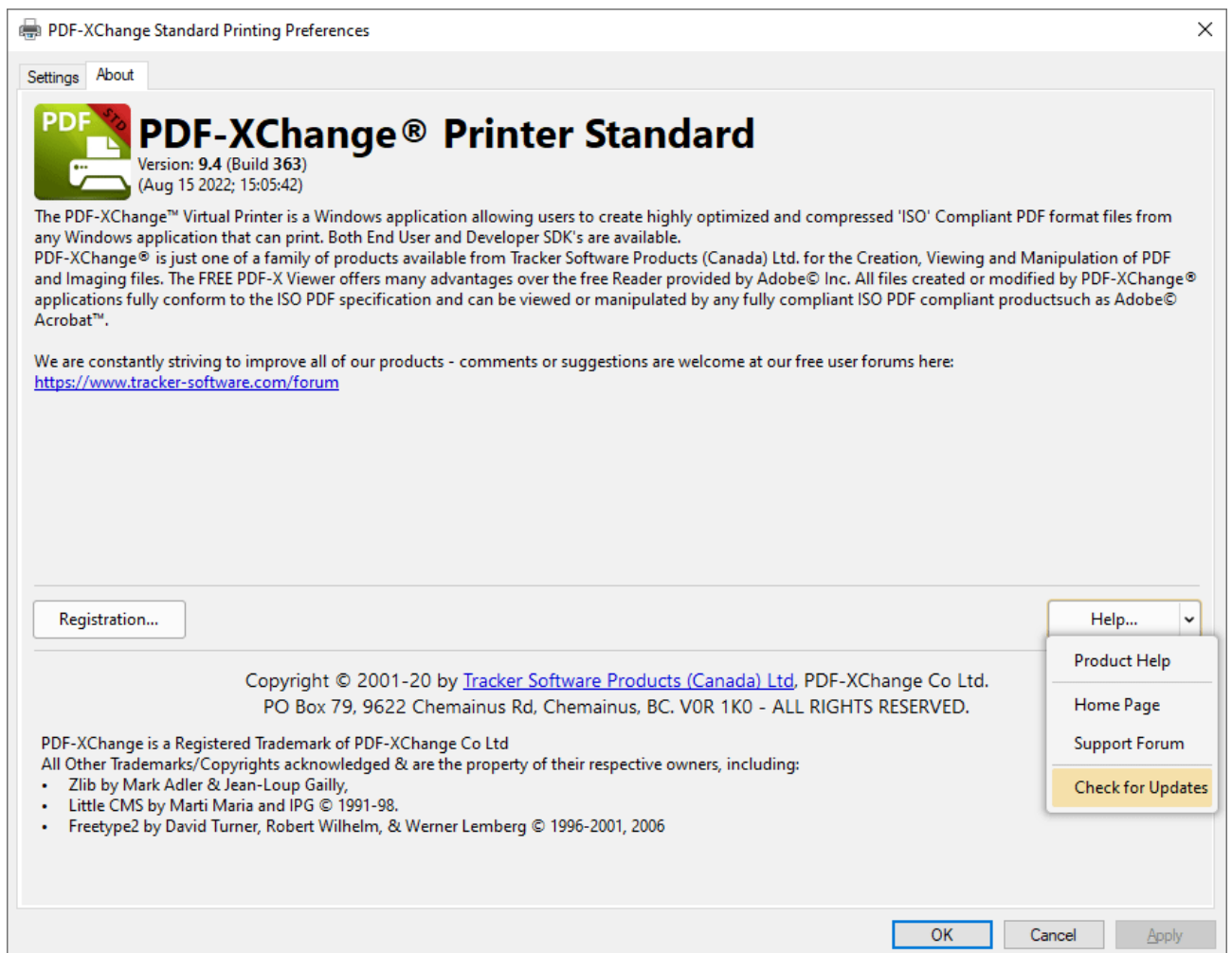
Figure 1. PDF-XChange Printer Standard Printing Preferences, Help Dropdown Menu, Check for Updates

However, this method simply calls the **PDF-XChange Updater** and initiates an identical process to that detailed at the link above.

4.4 Customization

Customization

The default settings for **PDF-XChange Printer Standard** are suitable for many users, but administrators may wish to define/enforce specific settings. There are three different methods for doing this, and the best method to use depends on how your users intend to use the printer.

[Profiles](235)

Profiles offer a way to save custom settings as a collection of settings that can be accessed from the **PDF-XChange Printer Standard** printer properties. Please note:

- It is possible to have multiple profiles for a single **PDF-XChange** printer.
- Users can manage their own profiles, as well as create, save, import and export them from within the printer preferences UI.
- Administrators can deploy, lock and set profiles as default.

[Multiple Printers](238)

Multiple printers offer a way to define printer settings that users can access by simply selecting the appropriate printer. Please note:

- Users do not need to access the printer preferences before printing in order to select the version of the printer that they want to use.
- This method enables printing directly to the printer without user interaction.

[PDFSaver /SetOptions](242)

This option should be used in cases where it is desirable to push certain settings to an entire groups of users, as opposed to allowing users to select their own settings. Please note:

- This option is designed for pushing simple or small changes.
- This option can be applied to specific printers or profiles
- This option can be used to apply specific settings while leaving all other printer settings untouched (as opposed to applying a profile that defines values for all printer settings for

multiple printers). For example, it is possible to push a setting that embeds all fonts without impacting any other options users may have set themselves.
- This option employs text-based configuration, which makes it easier for administrators to see and understand the operations that take place.

4.4.1   **Active Directory Administrative Templates**

    Active Directory Administrative Template

The **Active Directory** administrative template for **PDF-XChange Printer Standard** consists of two files, **PDFXDriver.admx** and **PDFXDriver.adml**, both of which are available via this permanent link to a zip archive of all the templates: **https://www.pdf-xchange.com/Tracker_AD_AdministrativeTemplates.zip**

Note that it is necessary for both of these files to be installed in the "central store" of your domain controller in order to utilize the administrative template. Further information on using these templates to set up your domain controller is available **here.**

Additionally, please note that not all features in **PDF-XChange Printer Standard** are available for template management. Currently only one policy is available - the **Registration**[233] policy:
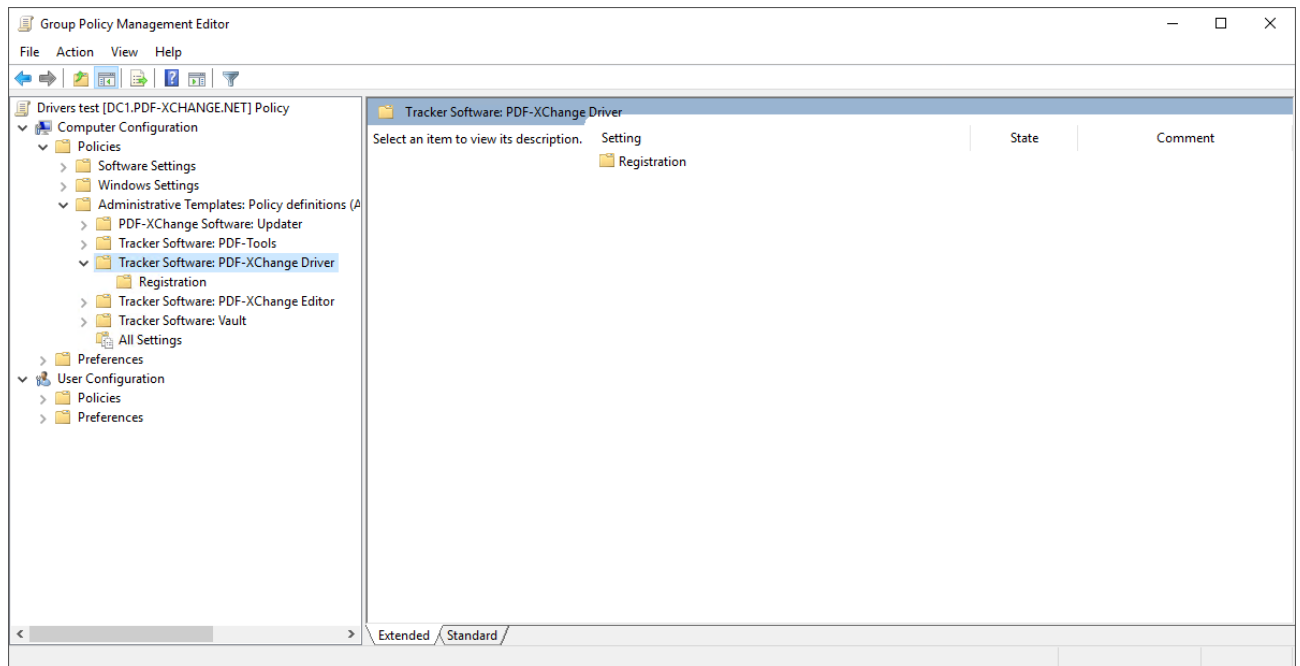
Figure 1. Group Policy Management Editor, Registration Policy

4.4.1.1 Available Policies

 Available Policies

The **PDF-XChange Printer Standard** administrative template policy contains only one policy - the **Registration** policy, which appears in the **Group Policy Management Editor** as detailed below:
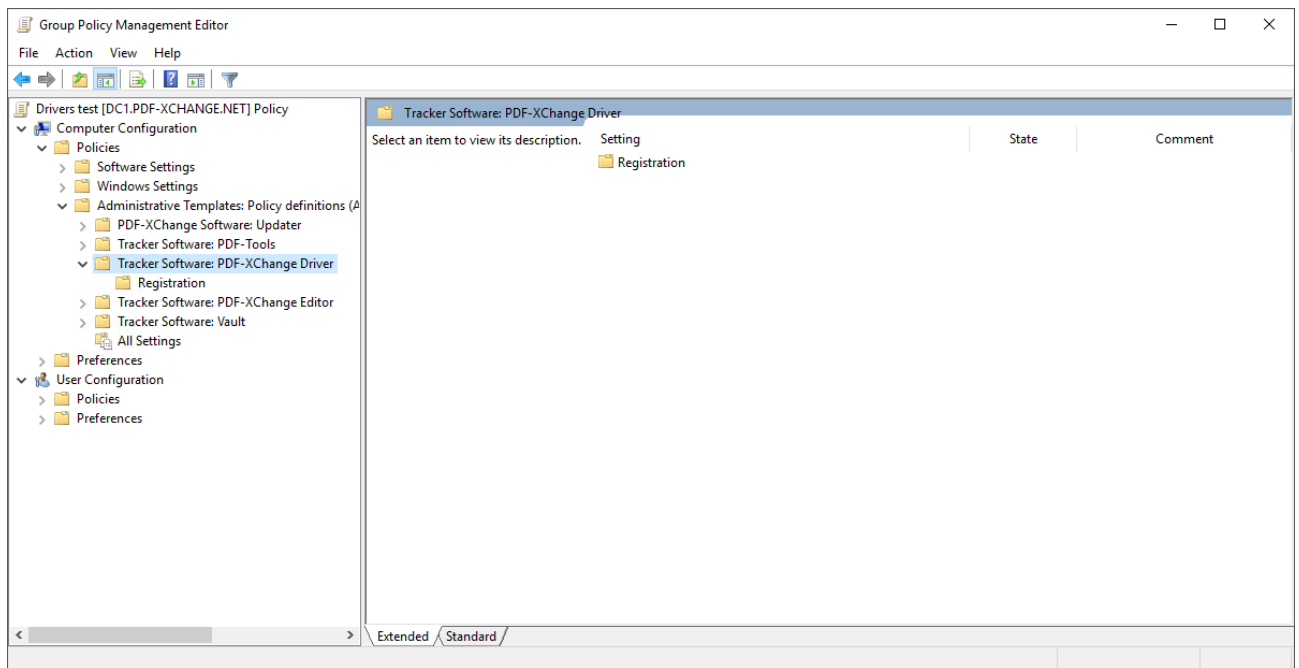
Figure 1. PDF-XChange Editor Administrative Template Policies

Further information about the **Registration** policy is available **here.** [233]

4.4.1.1.1 Registration

Registration

Category:	Registration
Policy Name:	Allow Add Serial Keys
Requirements:	PDF-XChange Driver v10.1.1 or later
Description:	Specifies whether or not users are allowed to add serial keys using the About->Registration dialog box.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXDriver\10.0\Registration
Reg Key Name:	b.CanAddSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Example: "Enabled" or "Not Configured" allows users to copy the license key text from the **PDF-XChange Editor**. Set to "0 -Disabled" to prevent keys being added.

Category:	Registration
Policy Name:	Allow Copy Serial Keys
Requirements:	PDF-XChange Driver v10.1.1 or later
Description:	Specifies whether or not users are allowed to copy serial keys to the clipboard from the About->Registration dialog box.

Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXDriver\10.0\Registration
Reg Key Name:	b.CanCopySerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Example: **"**Enabled" or "Not Configured" allows users to copy the license key text from the **PDF-XChange Editor**. Set to "0 -Disabled" to prevent keys being copied.

Category:	Registration
Policy Name:	Allow Delete Serial Keys
Requirements:	PDF-XChange Driver v10.1.1 or later
Description:	Specifies whether or not users are allowed to delete serial keys using the About->Registration dialog box.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXDriver\10.0\Registration
Reg Key Name:	b.CanDeleteSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Example: **"**Enabled" or "Not Configured" allows users to copy the license key text from the **PDF-XChange Editor**. Set to "0 -Disabled" to prevent keys being deleted.

4.4.2   Profiles

 Profiles

Profiles allow administrators (and users) to save custom settings as a collection that can be accessed from the **PDF-XChange Printer Standard** printer properties. It is important to note that profiles contain values for all printer options. Therefore when profiles are changed *all current settings are replaced with those of the profile,* and the settings of the profile become the 'current settings'. Users are free to make further changes to the current settings as desired.

For example, if users are printing from **PDF-XChange Editor,** then they can click the **Properties** button in the **Print** dialog box in order to change the profile used:
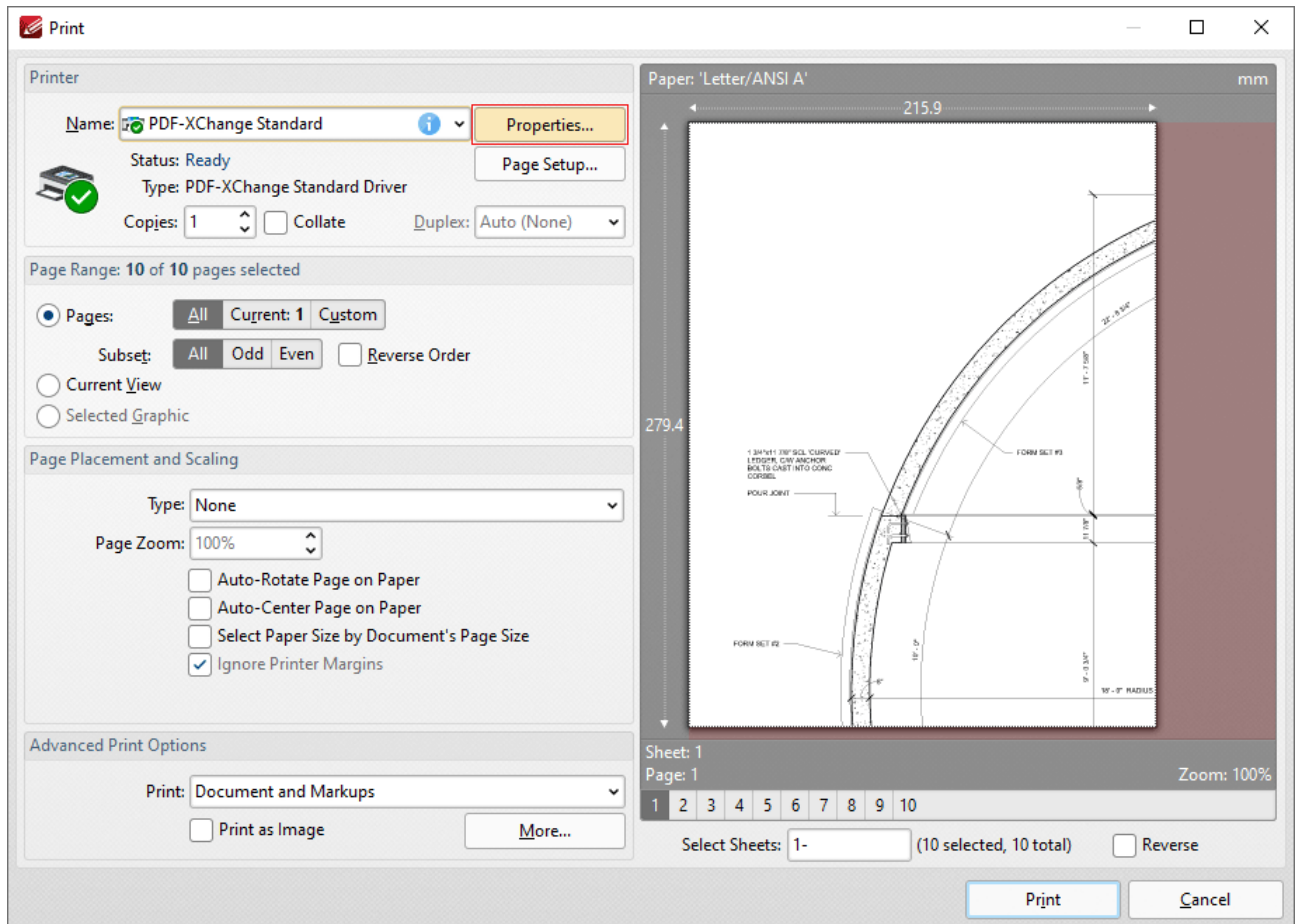
The **PDF-XChange Printer Standard** user interface will open and it is then possible to select the desired profile from the **Profile** drop down menu:
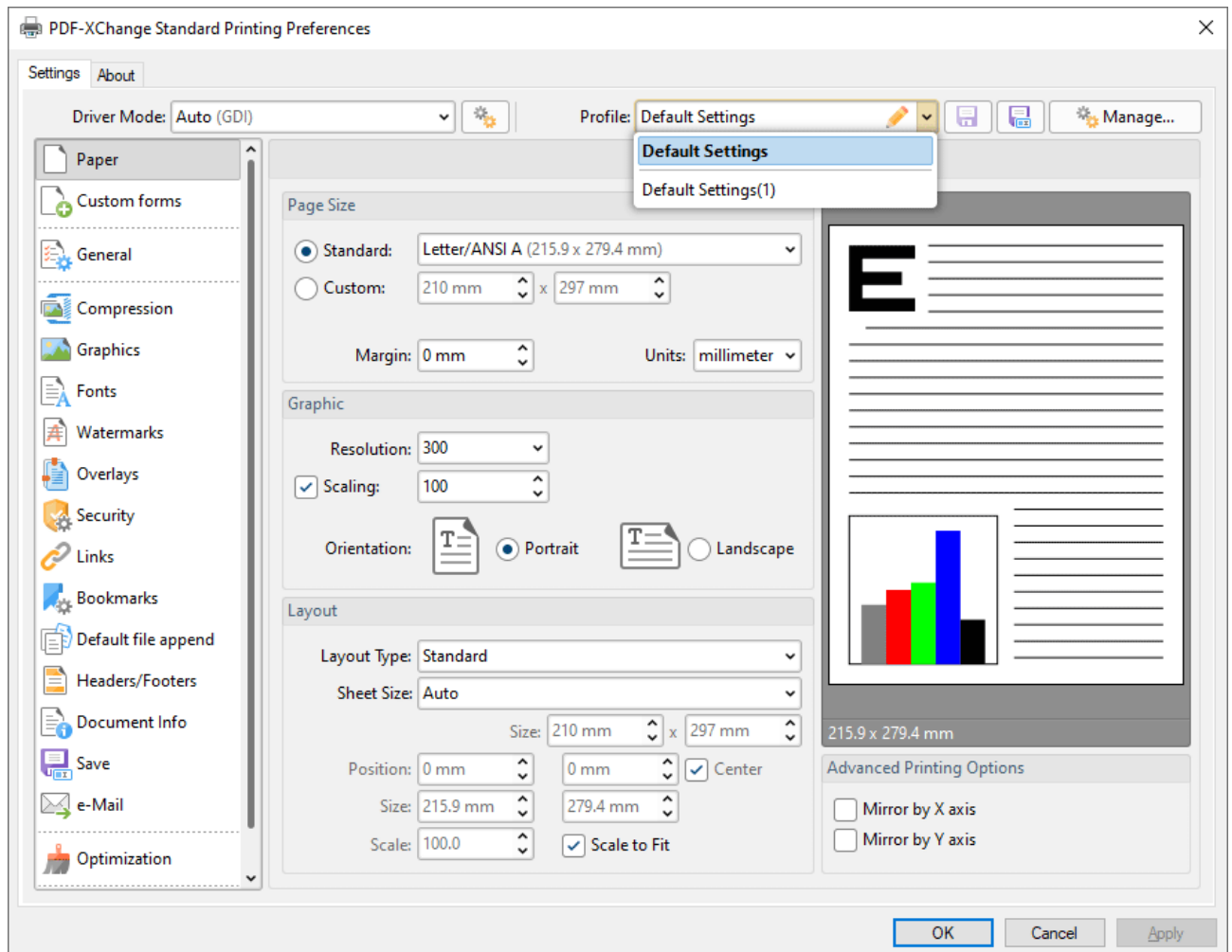
Figure 2. PDF-XChange Printer Standard User Interface, Profiles

Multiple Profiles

PDF-XChange Printer Standard can be used to create as many profiles as desired. Information on the creation and management of profiles in **PDF-XChange Printer Standard** is available **here.**

Pushing Profiles

If you want to push a profile across a managed environment, it is necessary to create a profile (as detailed at the link above) and then export it to file. Once the profile has been made available to the target machine (a network share can be used for this purpose) the following command can be used:

**rundll32 "\\UNC\path\to\drvui.x64.dll",DUI30_Command [/InstallProfile:"<fullpathtoprofile>"
| /SetDefProfile:"<profile_name>"] [/PrinterName:"<Printer Name>"] [/AsDefault] [/ForUser]**

The rundll32 contains the following parameters:

- **/InstallProfile:"<fullpathtoprofile>"** installs a profile from the path specified. If **/AsDefault** is specified then the profile will be set as the default profile.
- **/AsDefault** sets the new profile as the default profile.
- **/SetDefProfile:"<profile_name>"** sets the specified profile as the default profile. For example: **/SetDefProfile:"Current"**.
- **/PrinterName** specifies the printer to which changes are made. If no printer is specified then the default printer is used.
- **/ForUser** changes the profile for only the current user. If this parameter is not specified then the profile is changed for all users. Note that administrative rights are not required for this operation.

The command needs to be run on the target machine and with the appropriate rights. Unless the option **/ForUser** is used, 'per machine' is assumed and administrative rights are required.

Examples

Install the profile **CompanyEU.pxpp** on the **PDF-XChange Printer Standard** printer named "My PDF Printer" and set it as the default for all users (note that administrative rights are required).

```
rundll32 "C:\Program Files\Tracker Software\PDF-XChange Standard\drvui.x64.dll",DUI30_C
```

Install the profile **LetterHead.pxpp** on the **PDF-XChange Printer Standard** printer named "My PDF Printer", for a single user, and do not set it as the default profile (note that this must be run as the target user in order to have access to HKCU).

```
rundll32 "C:\Program Files\Tracker Software\PDF-XChange Standard\drvui.x64.dll",DUI30_C
```

4.4.3 Multiple Printers

Multiple Printers

The utilization of multiple printers enables the quick access to different setups of the **PDF-XChange Printer Standard** printer without the need to access and adjust printer properties. **PDF-XChange** printers are available via the **Windows** printing subsystem, and when multiple printers have been created they are detailed and available at that location. There are several benefits to installing multiple instances of **PDF-XChange Printer Standard,** such as the ability to send print jobs to different printing setups without the need to manually select a profile for each job.

Note that in **Windows 10,** the printers are grouped in **Devices and Printers:**
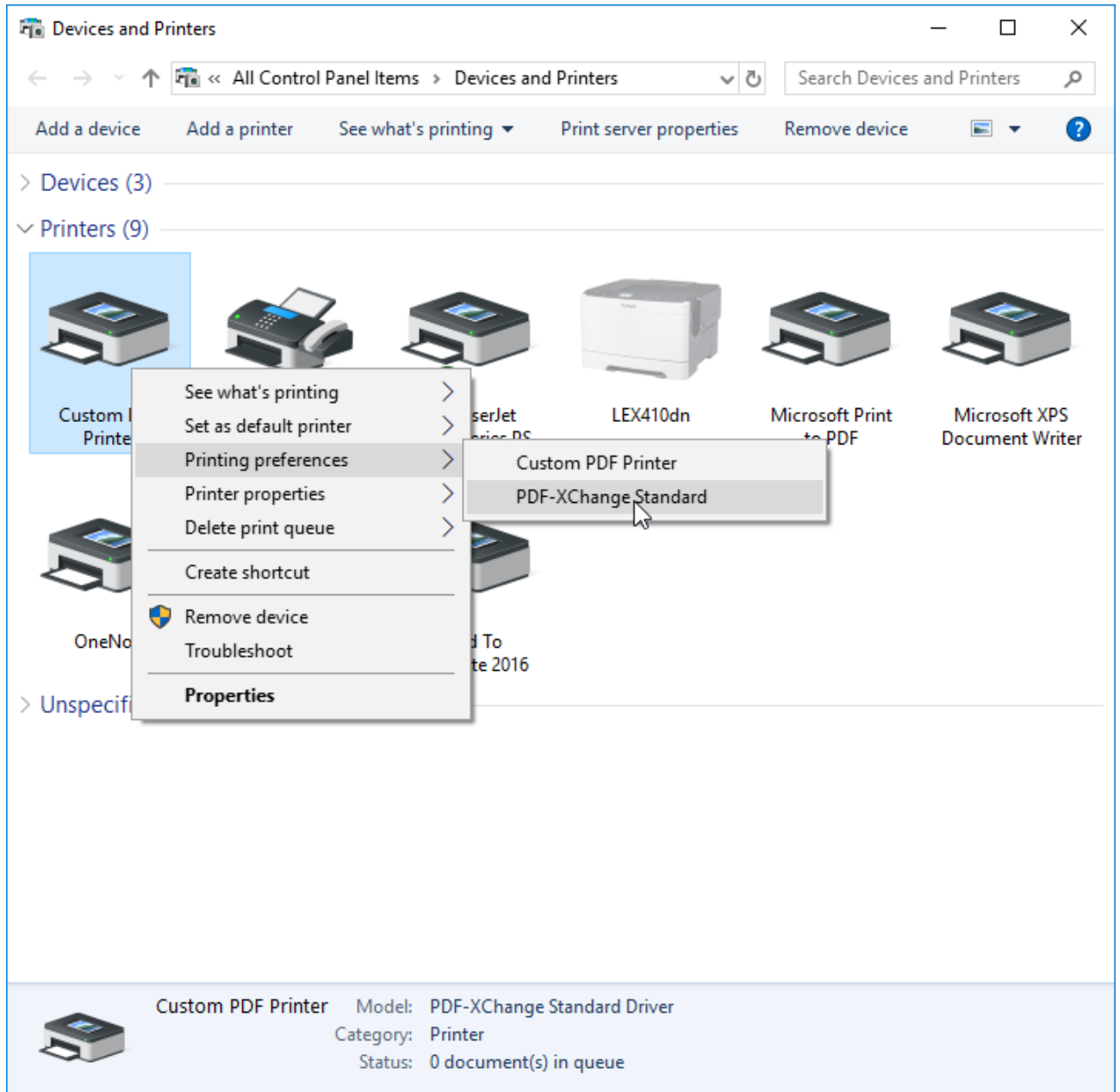
Figure 1. Devices and Printers Dialog Box, Windows 10

When users are performing printing operations, they can select from all versions of **PDF-XChange Printer Standard** that are installed on their machine. The printers are listed in the **Print** dialog box of the application used to perform the print operation. For example, in **PDF-XChange Editor**, the printers are detailed in the **Name** dropdown menu:
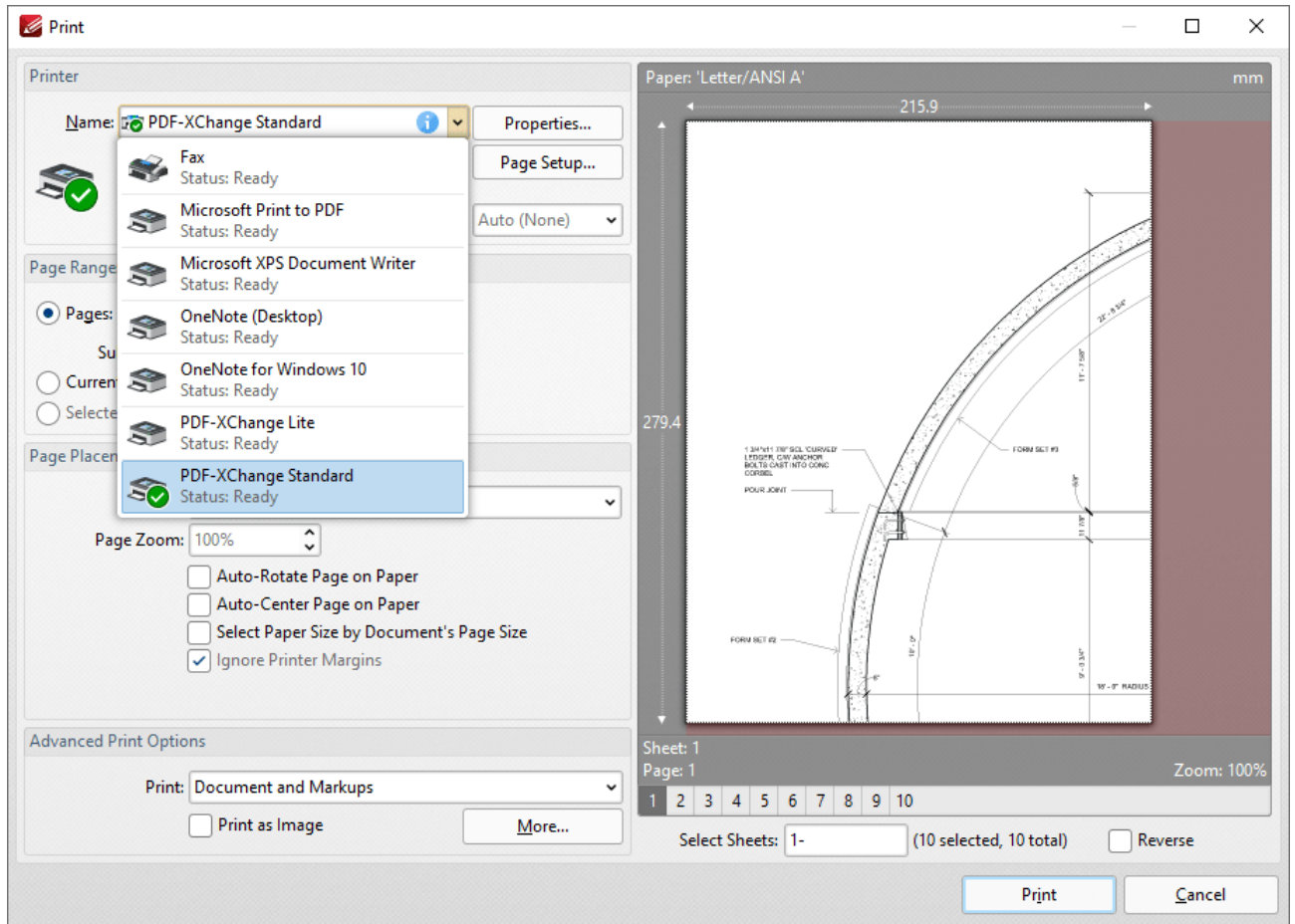
Figure 1. Print Dialog Box, PDF-XChange Editor

Creating Multiple Printers

/AddPrinter

The **pdfSaver.exe /AddPrinter** command line can be used in conjunction with **PDFSaver** to create new instances of an installed **PDF-XChange Printer Standard** printer.

> **pdfSaver.exe /AddPrinter <PrinterName> [/NoNotify]**

This command line can be used to install multiple copies of **PDF-XChange Printer Standard** and give each copy a custom name:

- **AddPrinter** adds a new printer to the printers list.
- **PrinterName** defines the name of the printer to be added.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Example

The following command line will create a new printer called "My PDF Printer":

```
"C:\Program Files\Tracker Software\PDF-XChange Standard\pdfSaver.exe" /AddPrinter "My F
```

/RemovePrinter

```
pdfSaver.exe /RemovePrinter <PrinterName> [/NoNotify]
```

This command line removes instances of the **PDF-XChange Printer Standard** printer:

- **RemovePrinter** removes a printer from the printers list.
- **PrinterName** determines the printer to be removed.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Example

The following command line will remove the printer called "My PDF Printer":

```
"C:\Program Files\Tracker Software\PDF-XChange Standard\pdfSaver.exe" /RemovePrinter "My PI
```

4.4.4 **/SetOptions Command Line**

 /SetOptions Command Line

If profiles or multiple printers are used in order to utilize different settings options in **PDF-XChange Printer Standard,** then every setting in the printer is changed each time a new printer or profile is loaded. However, the **pdfSaver.exe /SetOptions** command line enables the setting of some printer options without modifying the other options. Please note the following:

- **/SetOptions** can be used to push only the settings defined in the command line used. This is very useful to administrators who wish to set certain options without modifying any other options that users may have set themselves.
- **/SetOptions** can take arguments directly at the command line or via a text file. This makes it simple for administrators to see and determine the intended setup. Note that both profiles and multiple printers are 'black boxes' in this context, as there is no simple method for looking into a profile file in order to see what it contains.
- **/SetOptions** can be applied to a specified printer and a profile.

Using Command Line Arguments

Options can be direct arguments to **PDFSaver.exe:**

pdfSaver.exe /SetOptions optionname1=value1[;optionname2=value2] /Printer <PrinterName> [/Profile <ProfileName>] [/NoNotify]

This command line can be used to apply settings to **PDF-XChange Printer Standard:**

- **SetOptions** is the command called to set options.
- **optionname[1]** is the name of the first option to be set.
- **value[1]** is the value of the first option to be set.
- **optionname[N]** is the name of the "nth" option to be set.
- **value[N]** is the value of the "nth" option to be set.
- **PrinterName** is the name of the printer to which the options will be applied.
- **ProfileName** is the name of the profile to which the options will be applied.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Example

The following command line can be used to specify the generation of "PDF/A-2b" PDFs and to not run the PDF viewing application after file generation:

```
pdfSaver.exe /SetOptions "General.Specification=PDFA-2b;Save.RunApp=false" /Printer "PDF-
```

Using Text File Arguments

Options can be stored in a text file and passed to **PDFSaver.exe:**

> **pdfSaver.exe /SetOptions @optionslistfile /Printer <PrinterName> [/Profile**
> **<ProfileName>] [/NoNotify]**

This command line can be used to apply settings to **PDF-XChange Printer Standard:**

- **SetOptions** is the command called to set options.
- **@optionslistfile** is the name of the text file that contains a plain text list of options to be set. The options file must be in plain text format and contain one option name and its value per line, with each line separated by an equals (=) operator.
- **PrinterName** is the name of the printer to which the options will be applied.
- **ProfileName** is the name of the profile to which the options will be applied.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Example

The following command line can be used to specify an optionslistfile to define options:

```
pdfSaver.exe /SetOptions @c:\documents\opt.lst /Printer "PDF-XChange Standard"
```

Using /Dump Options to Determine the Current Settings

All current settings can be exported as a list alongside their respective **optionname**. Note that output can be to Standard Out (terminal) or a file, and that anything after a ";" is as a comment and has no functional value. This method is an effective way to get the correct **optionname** in order to apply a different value later. The syntax for the **/Dump Options** command line is as follows:

> **pdfSaver.exe /DumpOptions [<dest_file_name>] /Printer <PrinterName> [/Profile**
> **<ProfileName>]**

This command line lists all settings of the printer specified. If <dest_file_name> is not specified then settings will be listed in the console window.

- **DumpOptions** is the command called to export options.
- **dest_file_name** is the name of the text file to which the options will be exported.
- **PrinterName** is the name of the printer to which the options will be applied.
- **ProfileName** is the name of the profile to which the options will be applied.

Example

The following command line will list all settings in the console window:

```
C:\Program Files\Tracker Software\PDF-XChange Standard>pdfSaver.exe /DumpOptions /Printer
```

▱ Results are structured as detailed below:

```
C:\Program Files\Tracker Software\PDF-XChange Standard>Printer: 'PDF-XChange Standard'
Profile: '<current>'
Version: 7.0 build 328.2
===============================
Misc.AltDash=1; Yes
Name=""
Save.File="%[DocName]"
Save.Path=""
Save.RunApp=1; Yes
Save.AppName=""
Save.SaveType=2; Save
Save.AppParams="%f"
Save.RunCustom=0; No
Save.StripPath=0; No
Save.AutoNumber.Start=1
Save.AutoNumber.NumDigits=3
Save.WhenExists=0; ShowWarning
Save.UseLastPath=1; Yes
Save.ShowSaveDialog=1; Yes
EMail.Cc=""
EMail.To=""
EMail.Bcc=""
EMail.ZIP=1; Yes
EMail.From=""
EMail.Method=0; LaunchClient
EMail.Server=""
EMail.Content=""
```

```
EMail.Enabled=0; No
EMail.Subject=""
Fonts.Subset=1; Yes
Fonts.EmbedAll=0; No
Fonts.NeverEmbed.Fonts=";"
Fonts.NeverEmbed.Enable=0; No
Fonts.AlwaysEmbed.Fonts=";"
Fonts.AlwaysEmbed.Enable=0; No
Fonts.SubsetLevel=100
Fonts.EmbedProtected=1; Yes
Fonts.EmbedTemporary=1; Yes
Fonts.WriteToUnicode=0; No
Links.Border.Type=0; None
Links.Border.Color=16711680
Links.Border.Style=0; Solid
Links.Border.Width=10
Links.Enabled=0; No
Links.DetectFiles=0; No
Links.CheckExistance=0; No
Paper.DPI=300
Paper.Fit=1; Yes
Paper.Nup=0
Paper.Size=1
Paper.Scale=100
Paper.Units=1
Paper.CWidth=2100
Paper.Center=1; Yes
Paper.Margin=0
Paper.TopPos=0
Paper.Borders=0; No
Paper.CHeight=2970
Paper.LeftPos=0
Paper.MirrorX=0; No
Paper.MirrorY=0; No
Paper.NupOrder=0; AcrossFromLeft
Paper.PageScale=1000
Paper.GutterSize=127
Paper.LayoutType=0; Normal
Paper.SheetWidth=2100
Paper.BookletType=0; Brochure
Paper.Orientation=1; Portrait
Paper.SheetHeight=2970
```

```
Paper.SheetsInBook=4
Paper.StdSheetWidth=2100
Paper.SheetSizeIndex=-1
Paper.StdSheetHeight=2970
Paper.SupportScaling=1; Yes
Saver.EnvOrder="UAM"
Saver.AddinFile=""
Saver.ShowProgress=1; Yes
Simple.RunApp=1; Yes
Simple.EmbedAll=0; No
Simple.Compression=0
Comment=""
DigiSig.Top=254
DigiSig.Hash=""
DigiSig.Left=254
DigiSig.Page=-1
DigiSig.Align=32
DigiSig.Store=0; System
DigiSig.Width=508
DigiSig.DocMDP=2
DigiSig.Height=168
DigiSig.Reason=""
DigiSig.Contact=""
DigiSig.Enabled=0; No
DigiSig.Graphic=2; Name
DigiSig.PFXFile=""
DigiSig.Location=""
DigiSig.Invisible=0; No
DigiSig.ShowFlags=191
DigiSig.PFXPassword=""
DigiSig.GraphicFileName=""
DocInfo.Title=""
DocInfo.AddXMP=1; Yes
DocInfo.Author=""
DocInfo.Creator=""
DocInfo.Enabled=0; No
DocInfo.Subject=""
DocInfo.Keywords=""
DocInfo.AskForDocInfo=0; No
General.HideUI=0; No
General.PageMode=0; Default
General.FitWindow=0; No
```

```
General.OpenToPage=0
General.PageLayout=0; Default
General.HideMenubar=0; No
General.CenterWindow=0; No
General.HideToolbars=0; No
General.PageDuration=0
General.ShowDocTitle=0; No
General.Specification=0; Auto
General.TransDuration=1000
General.FullScreenMode=0; Default
General.TransitionStyle=0; Replace
General.MagnificationType=0; Default
General.MagnificationLevel=100.000
Overlay.Fit=0; No
Overlay.AlignH=1; Center
Overlay.AlignV=1; Middle
Overlay.Repeat=0; NoRepeat
Overlay.Enabled=0; No
Overlay.KeepAspect=1; Yes
Overlay.OverlayFile=""
Overlay.AsForeground=0; No
Overlay.OverlayExtra=1; Yes
Overlay.OverlayPassword=""
Graphics.Color.Convert.Dither=1; Yes
Graphics.Color.Convert.Method=0; None
Graphics.Color.Downsample.To=96
Graphics.Color.Downsample.Method=0; None
Graphics.Color.Downsample.IfAbove=128
Graphics.Indexed.Convert.Dither=1; Yes
Graphics.Indexed.Convert.Method=0; None
Graphics.Indexed.Downsample.To=96
Graphics.Indexed.Downsample.Method=0; None
Graphics.Indexed.Downsample.IfAbove=128
Graphics.MonoAndDrawings.Convert.Method=0; None
Graphics.MonoAndDrawings.Convert.Threshold=128
Graphics.MonoAndDrawings.Downsample.To=96
Graphics.MonoAndDrawings.Downsample.Method=0; None
Graphics.MonoAndDrawings.Downsample.IfAbove=128
Security.Type=0; 40RSA
Security.Enabled=0; No
Security.Perms40.AllowCopying=0; No
Security.Perms40.AllowChanging=0; No
```

```
Security.Perms40.AllowComments=0; No
Security.Perms40.AllowPrinting=0; No
Security.Perms128.Changes=0
Security.Perms128.Printing=0
Security.Perms128.EncryptMeta=1; Yes
Security.Perms128.AllowCopying=0; No
Security.Perms128.ContentAccess=0; No
Security.UserPassword=""
Security.OwnerPassword=""
Security.HasUserPassword=0; No
Security.HasOwnerPassword=0; No
Bookmarks.Enabled=0; No
Bookmarks.Template=""
Bookmarks.UpToLevel=1
Bookmarks.MatchLevel=0; No
Bookmarks.DisplayMode=2; ByItem
Bookmarks.AllowMultiLine=1; Yes
Bookmarks.DocTitleAsRoot=0; No
TimeStamp.Enable=0; No
TimeStamp.ServerURL=""
TimeStamp.ServerName=""
TimeStamp.RequireAuth=0; No
TimeStamp.ServerLogin=""
TimeStamp.ServerPassword=""
ExtraFiles.After.Enabled=0; No
ExtraFiles.After.FileName=""
ExtraFiles.After.Password=""
ExtraFiles.Before.Enabled=0; No
ExtraFiles.Before.FileName=""
ExtraFiles.Before.Password=""
RenderMode=-1; Auto
Watermarks.Enabled=0; No
Watermarks.Watermarks=""
Compression.Mono.Method=0; Auto
Compression.Mono.Enabled=1; Yes
Compression.Mono.JBIG2Method=0; Standard
Compression.Text=1; Yes
Compression.ASCII=0; No
Compression.Color.Method=0; Auto
Compression.Color.Enabled=1; Yes
Compression.Color.JPEGQuality=75
Compression.Indexed.Method=0; Auto
```

```
Compression.Indexed.Enabled=1; Yes
Compression.Graphics=1; Yes
PrintContext.PrintingApp=""
Optimizations.Blending=4; Darken
Optimizations.DeTesselation=1; Simple
Optimizations.EnableSwapping=1; Yes
Optimizations.SwapToDiskLimit=1
Optimizations.UseMaskedImages=1; Yes
Optimizations.UseTransparency=1; Yes
Optimizations.GrayPaletteAsRGB=0; No
Optimizations.ImagesOptimization=1; Yes
HeadersFooters.Footer.Left.Font="Arial"
HeadersFooters.Footer.Left.Color=0
HeadersFooters.Footer.Left.Value=""
HeadersFooters.Footer.Left.FontBold=0; No
HeadersFooters.Footer.Left.FontSize=100
HeadersFooters.Footer.Left.FontItalic=0; No
HeadersFooters.Footer.Right.Font="Arial"
HeadersFooters.Footer.Right.Color=0
HeadersFooters.Footer.Right.Value=""
HeadersFooters.Footer.Right.FontBold=0; No
HeadersFooters.Footer.Right.FontSize=100
HeadersFooters.Footer.Right.FontItalic=0; No
HeadersFooters.Footer.Center.Font="Arial"
HeadersFooters.Footer.Center.Color=0
HeadersFooters.Footer.Center.Value=""
HeadersFooters.Footer.Center.FontBold=0; No
HeadersFooters.Footer.Center.FontSize=100
HeadersFooters.Footer.Center.FontItalic=0; No
HeadersFooters.Header.Left.Font="Arial"
HeadersFooters.Header.Left.Color=0
HeadersFooters.Header.Left.Value=""
HeadersFooters.Header.Left.FontBold=0; No
HeadersFooters.Header.Left.FontSize=100
HeadersFooters.Header.Left.FontItalic=0; No
HeadersFooters.Header.Right.Font="Arial"
HeadersFooters.Header.Right.Color=0
HeadersFooters.Header.Right.Value=""
HeadersFooters.Header.Right.FontBold=0; No
HeadersFooters.Header.Right.FontSize=100
HeadersFooters.Header.Right.FontItalic=0; No
HeadersFooters.Header.Center.Font="Arial"
```

```
HeadersFooters.Header.Center.Color=0
HeadersFooters.Header.Center.Value=""
HeadersFooters.Header.Center.FontBold=0; No
HeadersFooters.Header.Center.FontSize=100
HeadersFooters.Header.Center.FontItalic=0; No
HeadersFooters.Enabled=0; No
HeadersFooters.OffsetTop=127
HeadersFooters.OffsetLeft=127
HeadersFooters.OffsetRight=127
HeadersFooters.OffsetBottom=127
HeadersFooters.FirstPageNumber=1
```

4.5 PDFSaver

 PDFSaver

PDFSaver.exe is a back-end management tool for the **PDF-XChange Printer Standard** virtual printer. The most relevant component of **PDFSaver** to administrators is its command line functionality. **PDFSaver.exe** can be called silently to perform a number of administrative tasks including adding a printer, removing a printer, setting a default printer or pushing settings to printers. Further information on the options available, both in the GUI and via the command line, is available in the online manual **here.**

The most common tasks that **PDFSaver** performs for administrators is to add, remove, and set as default a **PDF-XChange** printer:

pdfSaver.exe /AddPrinter <PrinterName> [/NoNotify]

This command line can be used to install multiple copies of **PDF-XChange Printer Standard** and give each copy a custom name:

- **PrinterName** determines the name for the new printer.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

pdfSaver.exe /RemovePrinter <PrinterName> [/NoNotify]

This command line removes instances of the **PDF-XChange** printer:

- **PrinterName** specifies the printer to be removed.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

pdfSaver.exe /SetAsDefault <PrinterName>

This command line sets a specified printer as the default printer:

- **PrinterName** determines the printer to be set as the default printer.

PDFSaver can also be used to silently change printer options via the **/SetOptions** switch.
The **/SetOptions** switch takes a string of colon-separated **"OptionName=value"** pairs:

pdfSaver.exe /SetOptions optionname1=value1[;optionname2=value2] /Printer <PrinterName> [/Profile <ProfileName>] [/NoNotify]

This command line can be used to change the printer options:

- **optionname** is the name of the option to be set.
- **PrinterName** defines the printer to which the setting will be applied.
- **ProfileName** defines the profile to which the setting will be applied.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Alternatively, **PDFSaver** can read options from a file:

pdfSaver.exe /SetOptions @optionslistfile /Printer <PrinterName> [/Profile <ProfileName>] [/NoNotify]

This command line can be used to change the printer options:

- **@optionslistfile** is the name of the file containing the options and the values to be applied. Note that if the file is not in the same folder as **PDFSaver.exe** then an appropriate path, full or relative, must be provided.
- **PrinterName** defines the printer to which the setting will be applied.
- **ProfileName** defines the profile to which the setting will be applied.
- **NoNotify** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Current options can be exported as a list:

pdfSaver.exe /DumpOptions [<dest_file_name>] /Printer <PrinterName> [/Profile <ProfileName>]

This command line lists all settings of the printer specified:

- **dest_file_name** defines the file into which the settings are dumped. If this is not specified then settings will be listed in the console window.
- **PrinterName** defines the printer from which the settings will be dumped.
- **ProfileName** defines the profile from which the settings will be dumped.

Further information on on using **PDFSaver** to set printer options is available

5 PDF-XChange Printer Lite

PDF-XChange Printer Lite

PDF-XChange Printer Lite is the lite version of the virtual printer **PDF-XChange Printer Standard.**
PDF-XChange Printer Lite is included at no extra cost when **PDF-XChange Editor** is purchased. **PDF-XChange Printer Lite** requires a license key for **PDF-XChange Editor** or **PDF-Tools,** as licenses for a stand-alone copy of **PDF-XChange Printer Lite** are not available. Licensing options are detailed **here.**

5.1 Installation

Installation

The **PDF-XChange Printer Lite** component can be installed as a stand-alone product or as a part of **PDF-XChange Editor** or **PDF-Tools. PDF-XChange Printer Lite** is not intended for mass deployment and therefore does not contain installation/customization options. If such options are required then **PDF-XChange Printer Standard** should be purchased instead.

Discrete MSI installers for the current version of **PDF-XChange Printer Lite** are always available at:

https://www.pdf-xchange.com/LiteV10.x64.msi
https://www.pdf-xchange.com/LiteV10.x86.msi

The installation of a product using an .msi is achieved by passing the .msi file as a parameter to the system executable msiexec.exe using standard **Microsoft Syntax.**

5.2 Updating

PDF-XChange Printer Lite

PDF-XChange Printer Lite is the lite version of the virtual printer **PDF-XChange Printer Standard. PDF-XChange Printer Lite** is included at no extra cost when **PDF-XChange Editor** is purchased. **PDF-XChange Printer Lite** requires a license key for **PDF-XChange Editor** or **PDF-Tools,** as licenses for a stand-alone copy of **PDF-XChange Printer Lite** are not available. Licensing options are detailed **here.**

5.3   Licensing

 PDF-XChange Printer Lite

PDF-XChange Printer Lite is the lite version of the virtual printer **PDF-XChange Printer Standard.**
PDF-XChange Printer Lite is included at no extra cost when **PDF-XChange Editor** is purchased. **PDF-XChange Printer Lite** requires a license key for **PDF-XChange Editor** or **PDF-Tools,** as licenses for a stand-alone copy of **PDF-XChange Printer Lite** are not available. Licensing options are detailed **here.**

6   PDF-Tools

PDF-Tools

This section of the manual contains information on the **Deployment Planning, Installation, Updating** and **Customization** of **PDF-Tools:**

- **Deployment Planning**
- **Installation** 260
- **Updating** 280
- **Customization** 291

6.1   Deployment Planning

Deployment Planning

PDF-Tools is available for installation via its own stand-alone product installer or as a component in the **PDF-XChange PRO** installer. Note that the virtual printer **PDF-XChange Printer Lite** is included when **PDF-Tools** is purchased and it will be installed by default when **PDF-Tools** is installed. It is important to consider the following factors before the installation of **PDF-Tools:**

- Are you going to install **PDF-Tools** via its own stand-alone product installer, or as a component of the **PDF-XChange PRO** installer? Further information on which installer you should use is available here.
- Do you want to customize which plugins are installed with the application?
- Do you want to change the name of the printer installed from the default name of **"PDF-XChange Printer Lite"?**
- Do you want the printer installed to be set as the default system printer?
- Do you want to change the language of the user interface from the default setting (US English)?
- Do you want to install the software updater?

You can use the .msi installation switches detailed **here** to determine these options.

6.2   Installation

Installation

There are several things that are important to note before **PDF-Tools** is installed:

- **PDF-Tools** can be installed via two different products - either via the stand alone **PDF-Tools** installer or as a part of the **PDF-XChange PRO** bundle.
- Installers are available in both .exe and .msi format, but the .msi installer should always be given preference for the reasons detailed **here.** 12

PDF-Tools Installers

The **PDF-Tools** component is included in the following product installers:

- **PDF-Tools** - the stand-alone **PDF-Tools** application. Note that a license for this product includes a free license for **PDF-XChange Editor** and the **PDF-XChange Printer Lite** virtual printer, both of which are also installed when **PDF-Tools** is installed.
- **PDF-XChange PRO.** A license for **PDF-XChange PRO** includes a license for **PDF-Tools,** which will install when **PDF-XChange PRO** is installed.

This section of the manual covers the **PDF-Tools** installers and their options and best practices. If you are installing **PDF-Tools** via **PDF-XChange PRO** then please refer to the section of the manual **here.** 321

Please note that the **PDF-Tools** and **PDF-XChange PRO** products both include virtual PDF printers - **PDF-XChange Printer Lite** and **PDF-XChange Printer Standard** respectively. However, these products are not the same and their licenses are not interchangeable. **PDF-XChange Printer Lite** is a simplified version of **PDF-XChange Printer Standard** and does not contain as many features or as much functionality. If printing-to-PDF is a priority, then **PDF-XChange Printer Standard** should be purchased. It is important to take note of this difference in licensing because a **PDF-Tools** key will only unlock the **PDF-XChange Printer Lite** printer and will not unlock the **PDF-XChange Printer Standard** printer. Similarly, a **PDF-XChange PRO** or **PDF-XChange Printer Standard** key will not unlock the **PDF-XChange Printer Lite** printer. If the wrong printer is deployed for the license key purchased then watermarks will be added to its output PDF documents and it is then necessary to remove the problematic printer and install the correct one or to buy a license for the printer that was installed.

Discrete .msi installers for the current version of **PDF-Tools** are always available at:

https://www.pdf-xchange.com/ToolsV10.x64.msi
https://www.pdf-xchange.com/ToolsV10.x86.msi

The installation of a product using an .msi is achieved by passing the .msi file as a parameter (along with the desired options) to the system executable **msiexec.exe** using standard **Microsoft Syntax.** Please note the following:

- If no options are specified then the default options will be used.
- If no features are specified then all features will be installed.
- The full UNC paths to the .msi installer and any supporting files should be used.
- Product features are specified using the **ADDLOCAL** standard .msi property.
- Product properties are specified using the **Product Specific Properties.**

A comprehensive list of the **PDF-Tools** installer switches and their options is available **here.**

The standard options that the **PDF-Tools** .msi installers use enable a consistent installation experience over a range of deployment methods. The switches and options remain the same whether they are assigned/published via **GPO, SCCM** or through third-party deployment tools. They are always applied via command line switches or through the modification of the .msi - either directly or using a transform file.

6.2.1   Switches for MSI Installers

Switches for MSI Installers

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

If you are using an older version of the software then please refer to the relevant user manual as the available switches may be different. All user manuals are detailed **here.**

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

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

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

Syntax

<Product.msi>

/j<u|m>

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

Syntax

<Product.msi>

Parameters

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

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

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

Display Options

/quiet

This switch installs the application without user interaction.

/passive

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

/q[n|b|r|f]

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

Restart Options

/norestart

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

/promptrestart

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

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

a - start up of actions.

c - initial UI parameters.

e - all error messages.

i - status messages.

m - out of memory or fatal exit information.

o - out of disk space messages.

p - terminal properties.

r - action-specific records.

u - user requests.

v - verbose output.

w - nonfatal warnings.

x - extra debugging information.

+ - append to existing file.

! - flush each line to the log.

* - log all information except for verbose output and extra debugging information.

/log

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

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

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

Modifiers

a - forces the reinstallation of all files.

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

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

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

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

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

p - only if a file is missing.

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

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

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

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. If it is used then all required features must be specified.

Syntax

ADDLOCAL=<list of features>

Features

- **F_Viewer** - **PDF-XChange Editor** and its components;
- **F_Plugins** - the plugins module for **PDF-XChange Editor.** (This requires **F_Viewer**).
- **F_Plugin_SP** - the 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** - facilitates the use of the default OCR features. (This requires **F_Plugins**).
- **F_OptimizerPlugin** - the plugin 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_EOCRAPlugin** - facilitates the use of the enhanced OCR features. (This requires **F_Plugins**).
- **F_AzureRMSPlugin** - the plugin for handling PDF files protected by **MS Azure RMS.** (This requires **F_Plugins**).
- **F_MDPlugin** - the plugin that enables the conversion of Markdown files into PDF documents. (This requires **F_Plugins**).
- **F_ODPlugin** - the plugin that enables working with files located on **Microsoft OneDrive.** (This requires **F_Plugins**).
- **F_BoxPlugin** - the plugin that enables working with files located on **Box.com.** (This requires **F_Plugins**).

- **F_3DPlugin** - the plugin that enables the viewing of embedded 3D content in PDF documents. (This requires **F_Plugins**).
- **F_ColorPlugin** - the plugin that enables the conversion of colors in PDF documents. (This requires **F_Plugins**).
- **F_CSVPlugin** - the plugin that enables the conversion of .csv files to tables in PDF documents. (This requires **F_Plugins**).
- **F_BrowserPlugins** - the plugin that enables the viewing of PDF files in web browsers. (This requires **F_Viewer,** as well as **F_IEPlugin** and/or **F_NPPlugin**).
- **F_NPPlugin** - the Firefox, Chrome, Safari and Opera plugin. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_IEPlugin** - the IE plugin. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_SanitizePlugin** – the plugin that enables the sanitization of documents. (This requires **F_Plugins**).
- **F_VLangs** - the language localization files for the software. (This requires **F_Viewer**).
- **F_Tools** - **PDF-Tools** and its components.
- **F_Tools_Plugins** - to install the collection of plugins that extend the functionality of **PDF-Tools.** (This requires **F_Tools**).
- **F_TLangs** - additional language files for localization in **PDF-Tools**. (This requires **F_Tools**).
- **F_Lite** - the **PDF-XChange Printer Lite V10** print driver and its related components.
- **F_Langs_Lite** - the files that allow the localization of languages in the **PDF-XChange Printer Lite V10** print driver and its components.
- **F_ShellExt** - the Windows Explorer and Windows shell extensions. This has multiple features, including the viewing of thumbnails, properties, previews and the inclusion of the **IFilter** component.
- **F_Updater** - the updater for **PDF-XChange** products. The updater checks automatically for updates to the software.
- **F_KeyInstaller** - the key installer for **PDF-XChange** applications.

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

Product Specific Properties

INSTALLLOCATION

This property specifies the installation folder.

Syntax

INSTALLLOCATION=<installation folder>

SET_AS_DEFAULT

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

Syntax

SET_AS_DEFAULT="0"

PNAME

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

Syntax

PNAME=<printer name>

SET_LITE_AS_DEFAULT

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

Syntax

SET_LITE_AS_DEFAULT="0"

VIEW_IN_BROWSERS

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

Syntax

VIEW_IN_BROWSERS ="0"

DESKTOP_SHORTCUTS

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

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

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

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

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

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

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

Syntax

APP_LANG=<id>

NOUPDATER

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

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

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

Syntax

SCHEDULEUPDATER=<0>

MSI Installer Examples

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

      ```
      msiexec /i ToolsV10.x86.msi /qb INSTALLLOCATION="C:\Program Files\My PDF
      Applications"
      ```

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

      ```
      msiexec /i ToolsV10.x86.msi /qb USERNAME="Dave" USERMAIL="abc@a.b.c"
      KEYFILE="\UNC\path\to\xcvaultfile"
      ```

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

      ```
      msiexec /i ToolsV10.x86.msi /qb APP_LANG=de-DE
      ```

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

ADDLOCAL is used, therefore only the features specified will be installed and **F_VLangs** must be specified separately:

```
msiexec/i ToolsV10.x86.msi /qb
ADDLOCAL="F_Viewer,F_Plugins,F_Plugin_SP,F_OCRPlugin,F_VLangs,F_BrowserPlug
ins,F_IEPlugin" APP_LANG=de-DE
```

6.2.2 **Switches for EXE Installers**

Switches for EXE Installers

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

The command line for installation is: **PDFXTools9.exe/Option [Optional Parameter] [PROPERTY=PropertyValue]**

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

Install Options

/install

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

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

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

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

/quiet

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

/passive

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

Restart Options

/norestart

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

Logging Options

/log

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

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

SET_AS_DEFAULT

If this property is not specified, or is specified with a value of "1", then **PDF-XChange Editor** will be set as the default application for viewing PDF files.

Syntax

SET_AS_DEFAULT="0"

VIEW_IN_BROWSERS

If this property is not specified, or is specified with a value of "1", **PDF-XChange Editor** will be configured to open PDF files within browsers.

Syntax

VIEW_IN_BROWSERS="0"

DESKTOP_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

APP_LANG

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

Syntax

APP_LANG=<id>

NOUPDATER

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

Syntax

NOUPDATER="0"

<div align="center">

EXE Installer Examples

</div>

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

  ```
  PDFXTools9.exe /quiet
  ```

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

  ```
  PDFXTools9.exe /quiet USERNAME="John Doe"
  USERMAIL="JohnDoe@emailaddress.com" KEYFILE="C:\license\V10Pro.xcvault"
  ```

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

  ```
  PDFXTools9.exe /quiet USERNAME="John Doe"
  USERMAIL="JohnDoe@emailaddress.com" KEYDATA="PVP60 - ZJ2J77DN5kdBuQRhj ...
  dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

6.3 Updating

Updating

PDF-Tools utilizes the **PDF-XChange Updater** to check for and download updates. The default behaviour is to allow users to check for and install updates (as long as the security permissions allow them to do so).

PDF-XChange recommends the use of the **Tracker Software Updater** Group Policy from the synonymous administrative template for the purposes of managing the update process. This will prevent users from upgrading separately, which would result in a mixture of versions across your enterprise.

The **PDF-XChange Updater** [350] installs by default when **PDF-Tools** is installed and creates a task in the **Windows** task scheduler called **TrackerAutoUpdate.** This task launches the command **"C:\Program Files\Tracker Software\Update\TrackerUpdate.exe" -CheckUpdate** to check for updates once every 14 days.

The **Windows Task Scheduler** can be used to adjust the settings of the **PDF-XChange Updater.** The settings for the updater can be adjusted in the **Windows Task Scheduler** via the **TrackerAutoUpdate** task:
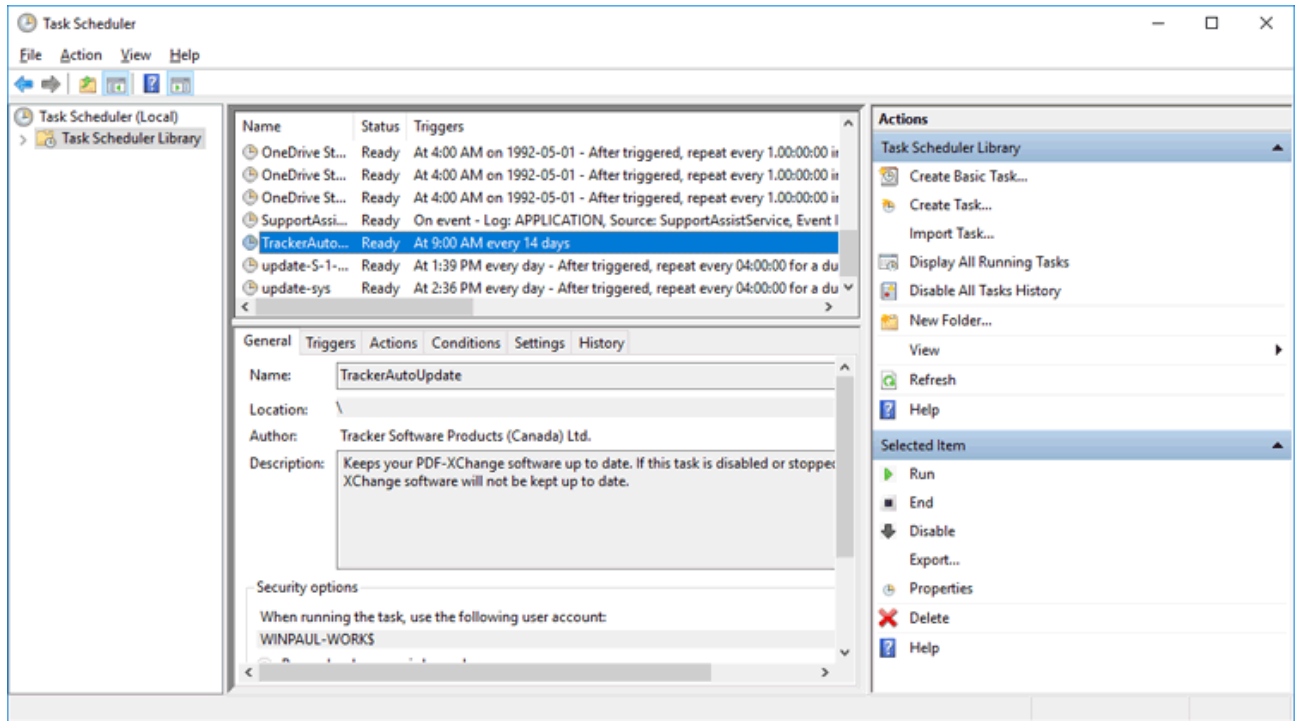
Figure 1. Task Scheduler, TrackerAutoUpdate Options

6.3.1   **Domain-Managed Updates**

![PDF-Tools icon] **Domain-Managed Updates**

The **PDF-XChange Updater** runs locally on all machines and is enabled by default, which means all users can update their software themselves when a new version becomes available. Note that updates are always a complete product installer and the process of updating always means the entire software package must be reinstalled, as **PDF-XChange** does not offer patches or other methods of modifying existing installations. It is not necessary to uninstall existing applications when updates are installed, as the update will replace the existing installation (and preserve customized settings, file history and other similar parameters).

Managed Updates

There are two **Active Directory** administrative templates that relate to updates for **PDF-Tools:**

Tracker Software: PDF-Tools

This template disables the **Check for Updates** function in **PDF-Tools:**
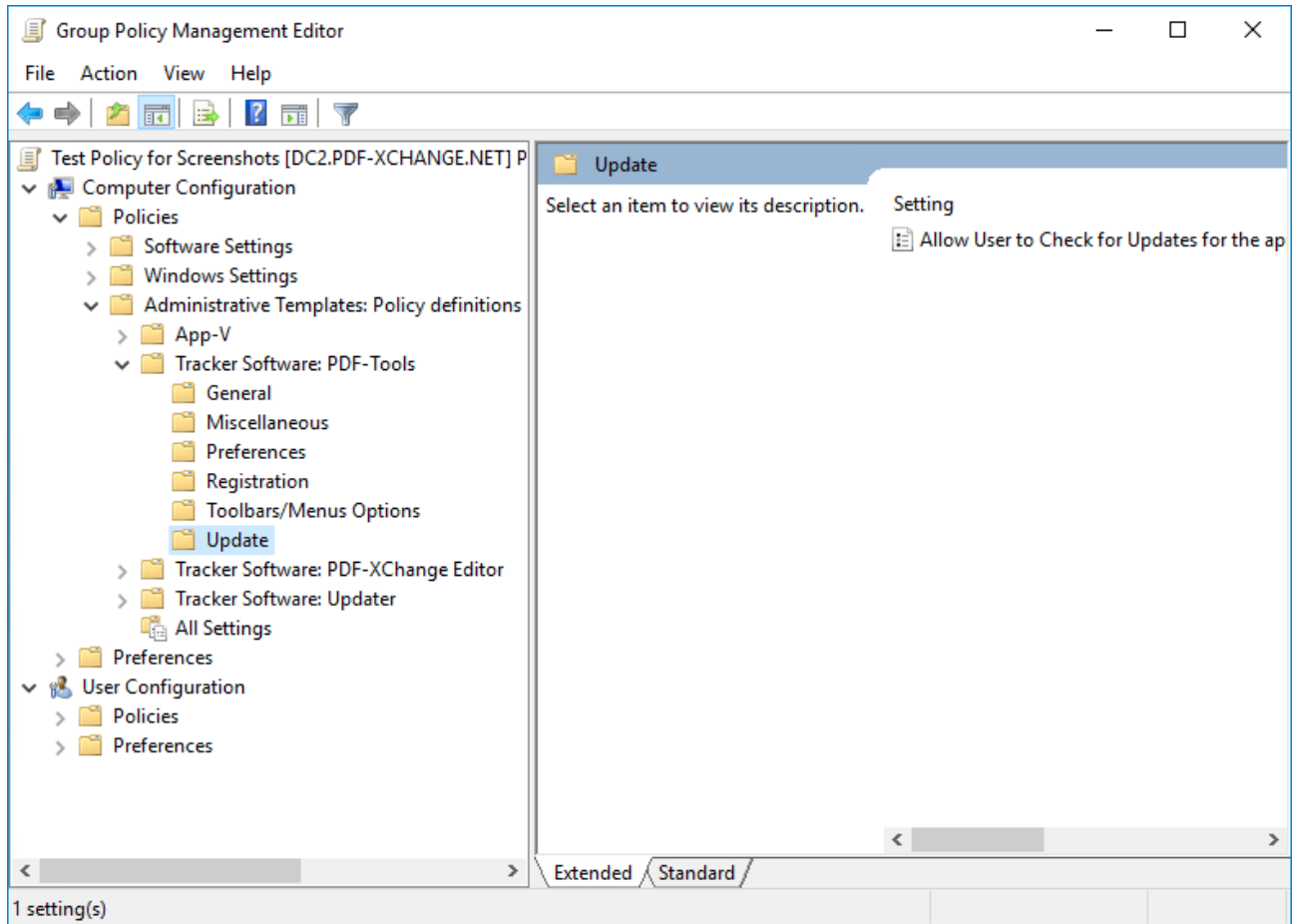
Figure 1. Group Policy Management Editor, PDF-Tools Administrative Template, Update Policy

Open the policy to enable/disable it. If the policy is enabled then users can check for updates, and if it is disabled then users are prevented from checking for updates. If it is set to "Not Configured" then users will be able to check for updates:
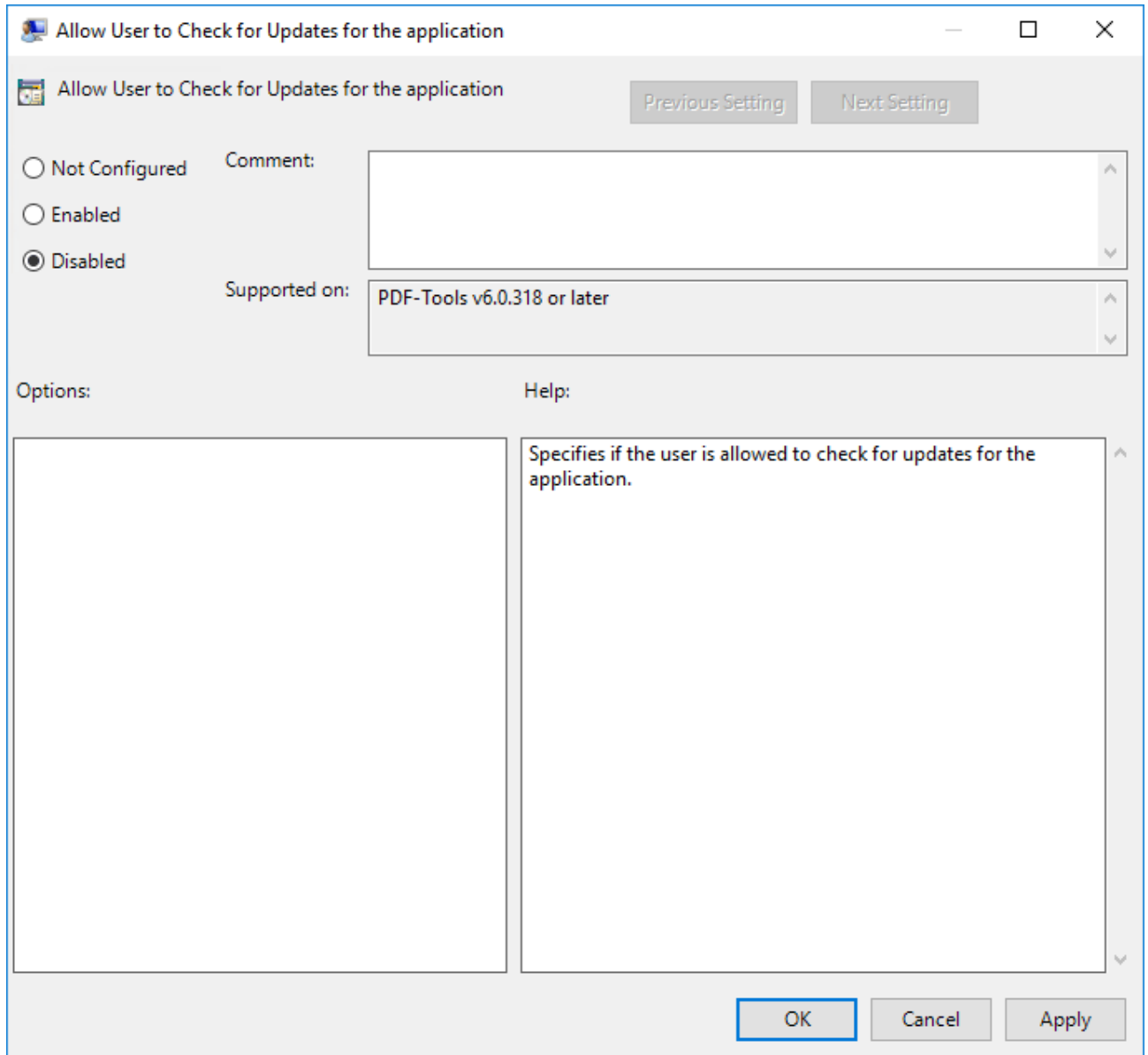
Figure 2. "Allow User to Check for Updates for the application" Policy

Please note that the **Tracker Updater Administrative Template** policy detailed **here** 360 may override this policy. If there is a conflict between update policies then the policy that disables updates will be given priority. For example, if updates are enabled in the **PDF-Tools** policy but disabled in the **Tracker Updater** policy, then updates will not be enabled. Or, if updates are enabled in the **Tracker Updater** policy but disabled in the **PDF-Tools** policy, then updates will not be enabled in **PDF-Tools.**

Tracker Software: Updater

This template can be used to enable/disable all of the **PDF-XChange** product updates:
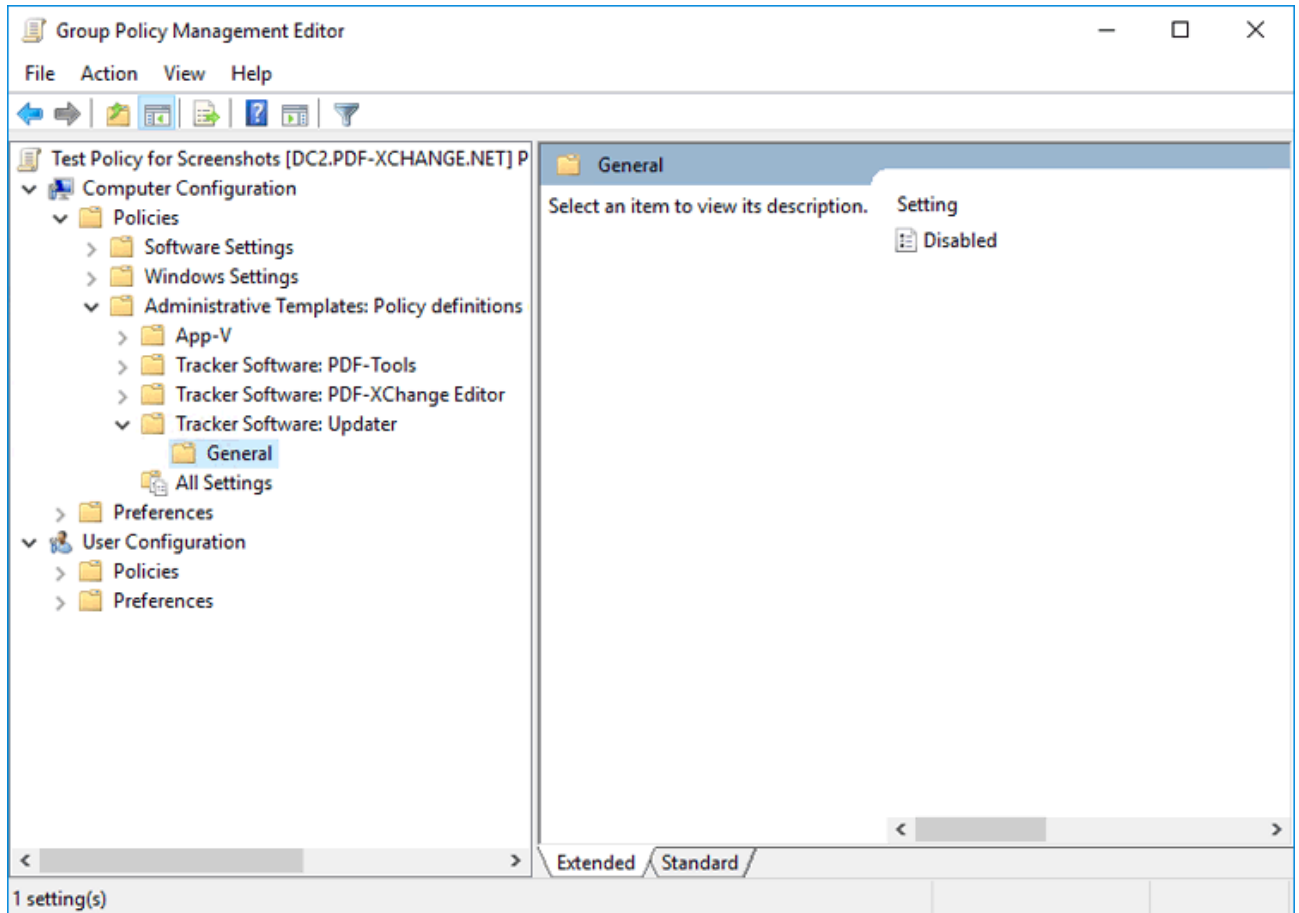
Figure 3. Group Policy Management Editor, PDF-XChange Editor Administrative Template, General Policy

We recommend disabling the **Tracker Updater** on user devices and pushing updates as complete product packages across your enterprise in order to ensure that the same version of the software is maintained on all systems.

6.3.2   User-Managed Updates

User-Managed Updates

Unless this command is disabled via **Active Directory,** users can click **Check for Updates** in the **Help** tab to open the **PDF-XChange Updater:**
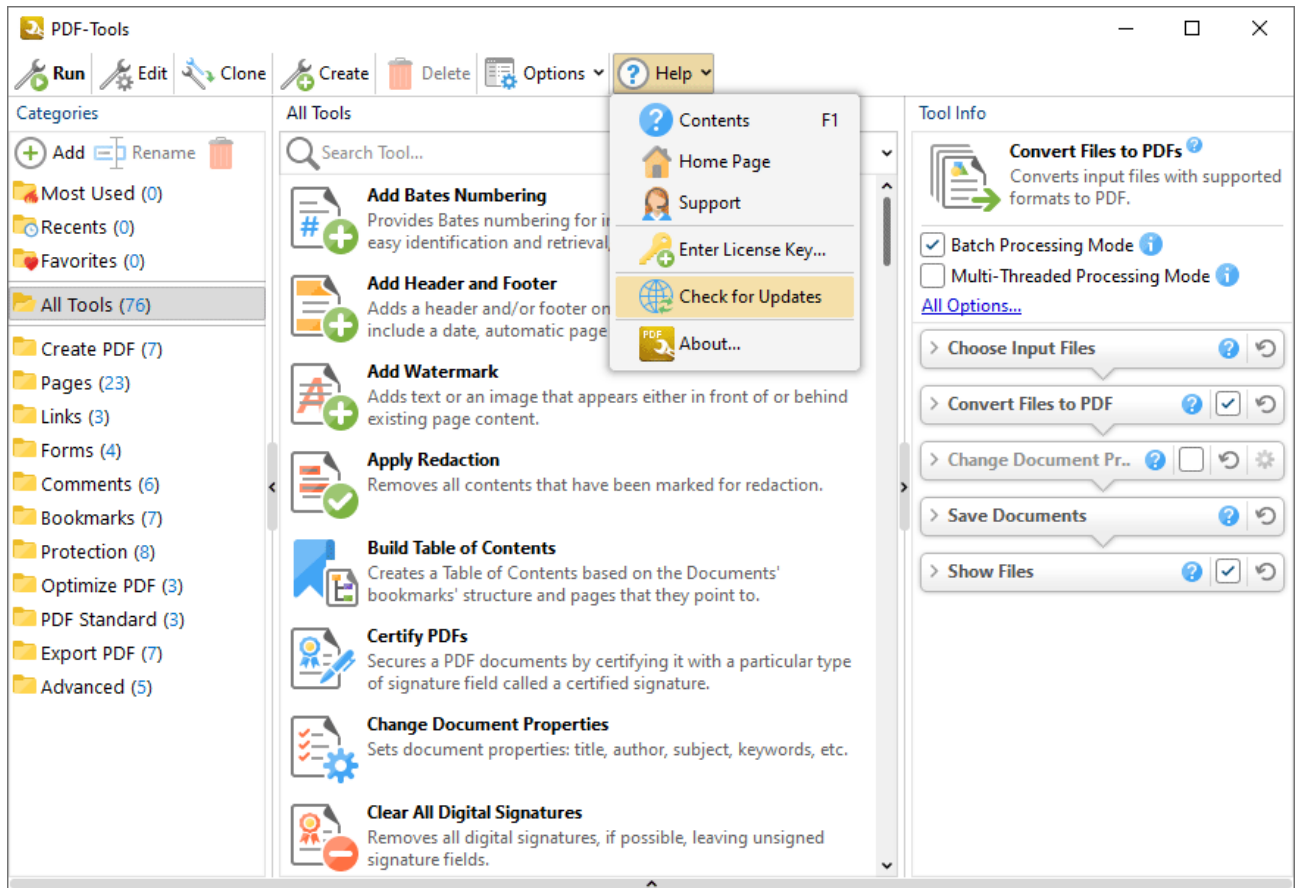
Figure 1. Help Tab, Check for Updates

This launches the **PDF-XChange Updater,** which will download and install any updates currently available. The **PDF-XChange Updater** interface appears as detailed below:

Figure 2. PDF-XChange Update Dialog Box

- Available updates are displayed in the main window. Click the **Download** button to download and install available updates.
- Click **Update History** to view a breakdown of recent updates.
- Click **Installed Products** to view a breakdown of installed products from **PDF-XChange.**
- Click **Settings** to customize settings for the **PDF-XChange Updater.** These options are detailed beneath *(figure 4)* below.
- Click **Help** to launch the online help for the **PDF-XChange Updater.**
- Select/clear the **Show Hidden Updates** box to show/hide hidden updates.
- Click **Check Again** to check for more recent updates.
- Click **Close** to close the **PDF-XChange Update** dialog box.

Settings

Figure 3. Updater Settings Dialog Box

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

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

Click **Save** to save settings.

Autostart

Use the **Autostart** tab to set a schedule for automatically checking for updates to the software:

Figure 4. Updater Settings Dialog Box, Autostart Tab

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

Click **Save** to save settings.

6.4 Customization

Customization

PDF-Tools is highly customizable product that contains a range of adjustable settings and functionality that enables the customization and creation of PDF-related tools. It is often useful for users to be able to share their settings and customized tools with each other. There are three methods that can be used for this purpose:

1. **Using a Settings File** 292

   All the settings available in the **PDF-Tools** "Preferences" can be exported to and imported from a file, and these settings can be applied either through the **PDF-Tools** GUI or silently via the command line, as detailed **here.**

2. **Using a Custom Tools File**

   Custom tools can also be exported to and imported from a file, using either the **PDF-Tools** GUI or via the command line.

3. **Via Active Directory** 299

   It is also possible to use an Active Directory Group Policy via the **PDF-Tools** administrative template to import settings/custom tools.

6.4.1 Managing Settings

 Managing Settings

GUI-Based Settings Management

The user Interface for **PDF-Tools** can be customized via the application preferences:
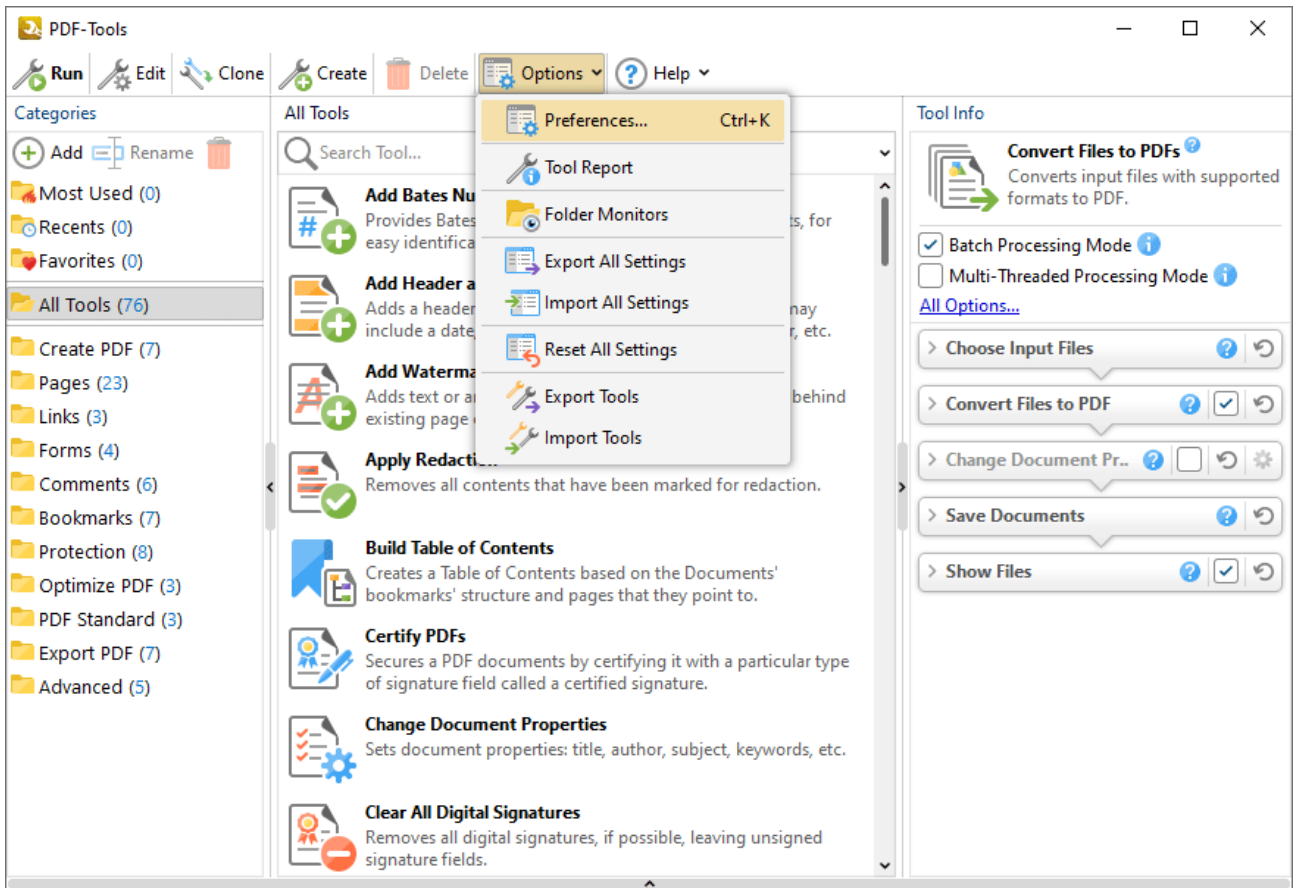
Figure 1. PDF-Tools UI, Options Dropdown Menu, Preferences Highlighted

When this option is clicked, the **Preferences** dialog box will open:
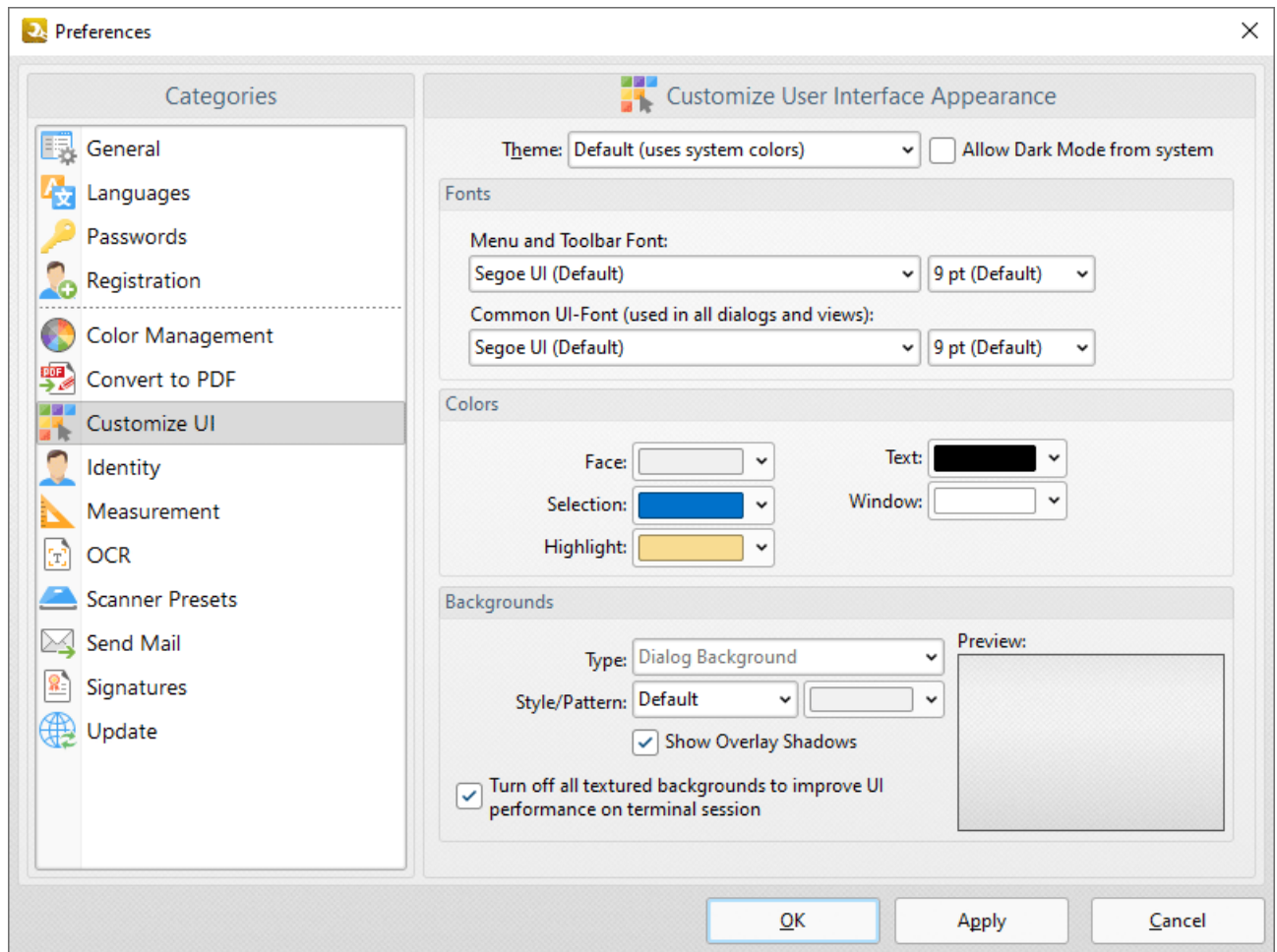
Figure 2. Preferences Dialog Box

Users can browse through the different **Preferences** categories and customize them as desired. These settings can then be saved to file using the **Export All Settings** option in the **Options** dropdown menu of the **PDF-Tools** UI:
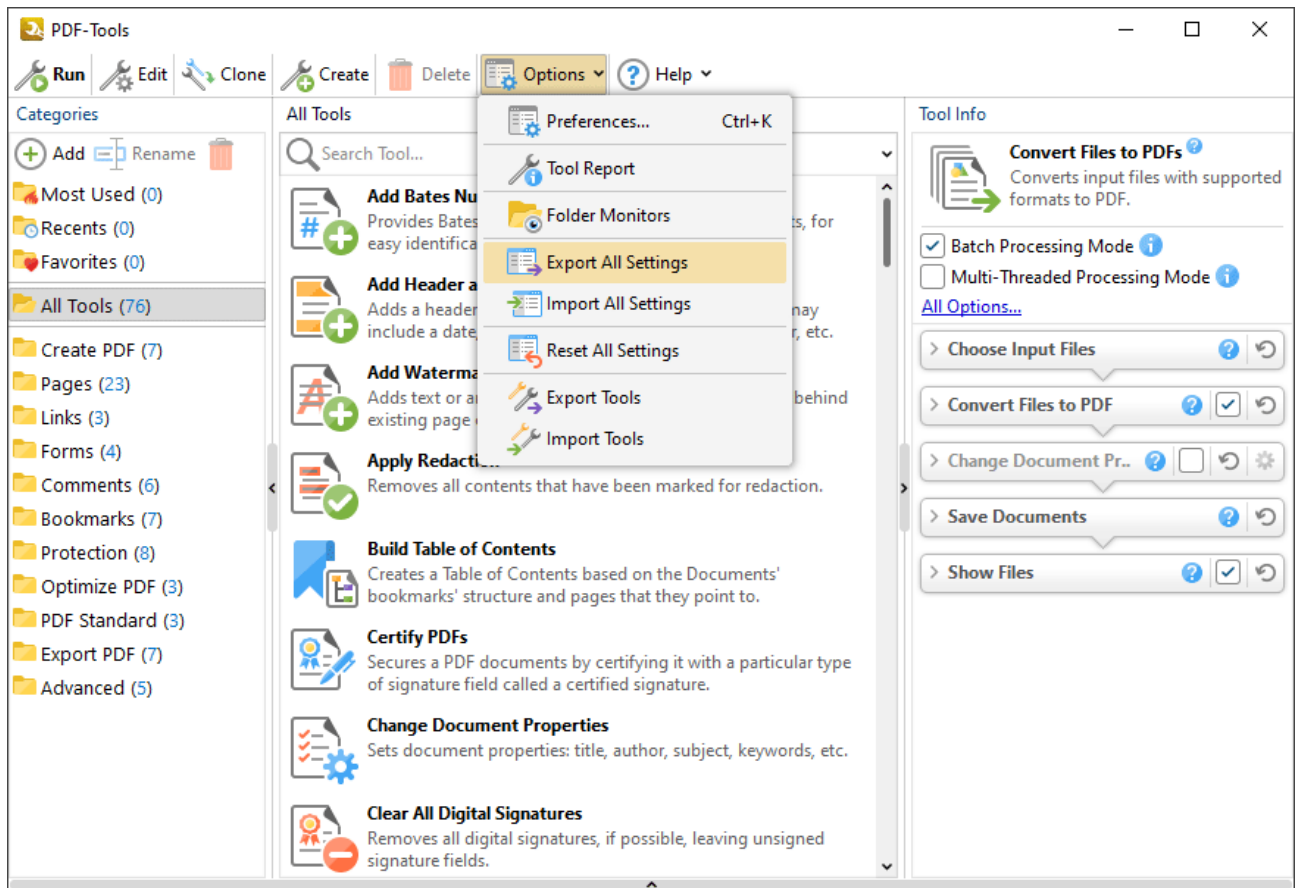
Figure 3. PDF-Tools UI, Options Dropdown Menu, Export All Settings Highlighted

A similar method can be used to import settings from file using the GUI and the **Import All Settings** option in conjunction with a previously exported settings file. Note that settings files are stored in a unique format and cannot be edited by users.

Unattended Command Line Import/Export for Settings

PDF-Tools also supports the import/export of settings from file via the command line. All command line options for **PDF-Tools** are available in the manual **here.** The command lines used for exporting and importing settings are detailed below:

/ExportSettings

This command line exports all program settings to a specified file.

Syntax

   /ExportSettings <filename>

Parameters

<filename> - is the path to the file where program settings will be saved.

Example

```
PDFXTools.exe /ExportSettings "c:\PDF-Tools_AppSettings.pdts"
```

/ImportSettings

This command line imports program settings/tools from a specified file.

Syntax

/ImportSettings[:showui=no|yes|full] <filename>

Parameters

- showui – if 'yes' is specified and the <filename> is a path to a **PDF-Tools** export file then the **Choose Tools for Import** dialog box will open. This allows users to select manually the tools to be imported. (If settings are being imported then the import will take place without a dialog box). If 'full' is specified then the main window of the user interface will be displayed, and if the <filename> is a path to a **PDF-Tools** export file then the **Choose Tools for Import** dialog box will also open. The default value is 'yes'.
- <filename> - is the path to the file that contains program settings/tools. These can be created using the **/ExportSettings** or **/ExportTools** commands (or the corresponding features in the user interface).

Examples

```
PDFXTools.exe /ImportSettings "c:\PDF-Tools_AppSettings.pdts"
```
- to import all settings from the file "c:\PDF-Tools_AppSettings.pdts".

```
PDFXTools.exe /ImportSettings:showui=full "c:\PDF-Tools_Exchange.pdtex"
```
- to display the main window of the user interface and import tools from the file "c:\PDF-Tools_Exchange.pdtex" via the **Choose Tools for Import** dialog box.

6.4.2   Managing Custom Tools

Managing Custom Tools

PDF-Tools contains functionality that enables the creation of custom tools in order to meet specific tasks, as detailed **here.** These tools can be exported to file from **PDF-Tools** and imported to other installations of **PDF-Tools,** which allows users to share their custom tools with each other.

GUI-Based Tools Import/Export

Click the **Options** dropdown menu, then click **Export Tools** to export tools from **PDF-Tools:**
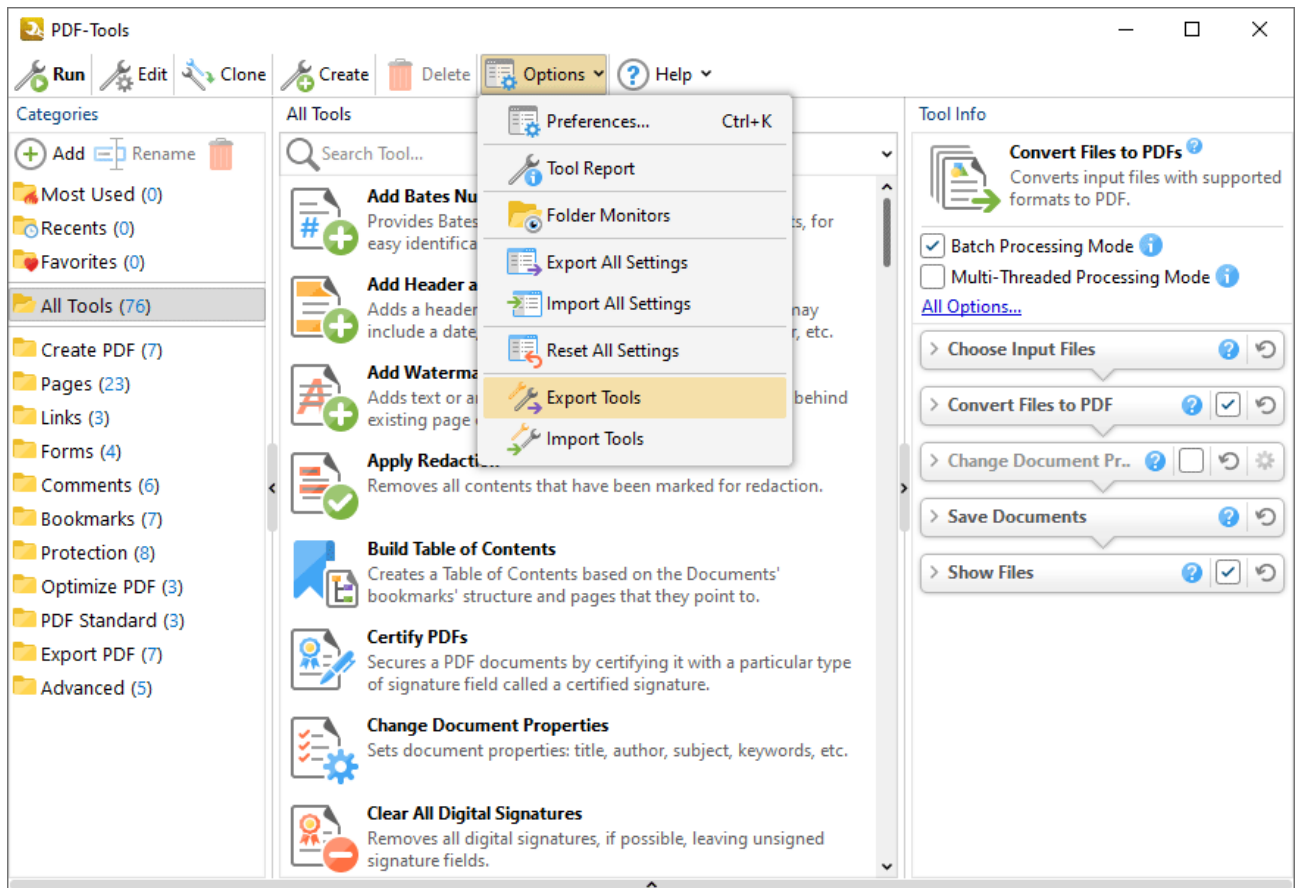
Figure 1. PDF-Tools UI, Options Dropdown Menu, Export Tools Selected

Alternatively, if users want to import tools, then they should click **Import Tools** and then select the <filename>.pdtex file that was created when tools were exported previously.

Unattended Tools Import/Export via the Command Line

PDF-Tools also supports the import/export of custom tools from file via the command line. All command line options for **PDF-Tools** are available in the **PDF-Tools** manual **here.**

Command Line Options

/ExportTools

This command line exports tools and their settings to a specified file.

Syntax

/ExportTools[:showui=no|yes|full] <filename>

Parameters

- **showui** - if 'yes' is specified then the **Choose Tools for Export** dialog box will be displayed. This allows users to select manually the tools to be exported. If 'full' is specified then the main window of the user interface will also be displayed. The default value is 'yes'.
- **<filename>** - is the path to the file where exported tools will be saved.

Example

`PDFXTools.exe /ExportTools:showui=full "c:\PDF-Tools_Exchange.pdtex"` - to export tools via the **Choose Tools for Export** dialog box and display the main window of the user interface.

/ImportTools

This command line imports tools to **PDF-Tools.**

Syntax

/ImportTools[:showui[=no|yes|full]] <filename>

Parameters

- **showui** – if 'yes' is specified then the **Choose Tools for Import** dialog box will be displayed. This allows users to select manually the tools to be imported. If 'full' is specified then the main window of the user interface will also be displayed. The default value is 'yes'.
- **<filename>** - is the path to the file that contains previously exported tools. The **/ExportTools** command (or the corresponding feature in the user interface) can be used to export tools to file.

Examples

`PDFXTools.exe /ImportTools "c:\my-custom-tools.pdtex"` – to import all tools from the file **"c:\my-custom-tools.pdtex"**.

`PDFXTools.exe /ImportTools:showui "c:\pdf-tools.pdtex"` - to import tools from the file **"c:\pdf-tools.pdtex"** via the **Choose Tools for Import** dialog box.

`PDFXTools.exe /ImportTools:showui=full "c:\pdf-tools.pdtex"` - to import tools from the file **"c:\pdf-tools.pdtex"** via the **Choose Tools for Import** dialog box and display the main window of the user interface.

6.4.3 **Active Directory Administrative Templates**

Active Directory Administrative Template

The **Active Directory** administrative template for **PDF-Tools** comes in two files: **PDFXTools.admx** and **PDFXTools.adml**, both of which are available via this permanent link to a zip archive of all the templates: **https://www.pdf-xchange.com/Tracker_AD_AdministrativeTemplates.zip**

Note that it is necessary for both of these files to be installed in the "Central Store" of your domain controller in order to utilize the administrative template. Further information on using these templates to set up your domain controller is available **here.**

Additionally, please note that not all features in **PDF-Tools** are available for template management. Available policies are detailed below:

- **General** 302
- **Miscellaneous** 309
- **Preferences** 310
- **Registration** 312
- **Toolbar/Menu Options** 314
- **Update** 316

6.4.3.1 Available Policies

Available Policies

The **PDF-Tools** administrative template organizes its policies into six categories. When these policies are viewed on a domain controller using the "**Group Policy Management Editor**" they appear as detailed below:
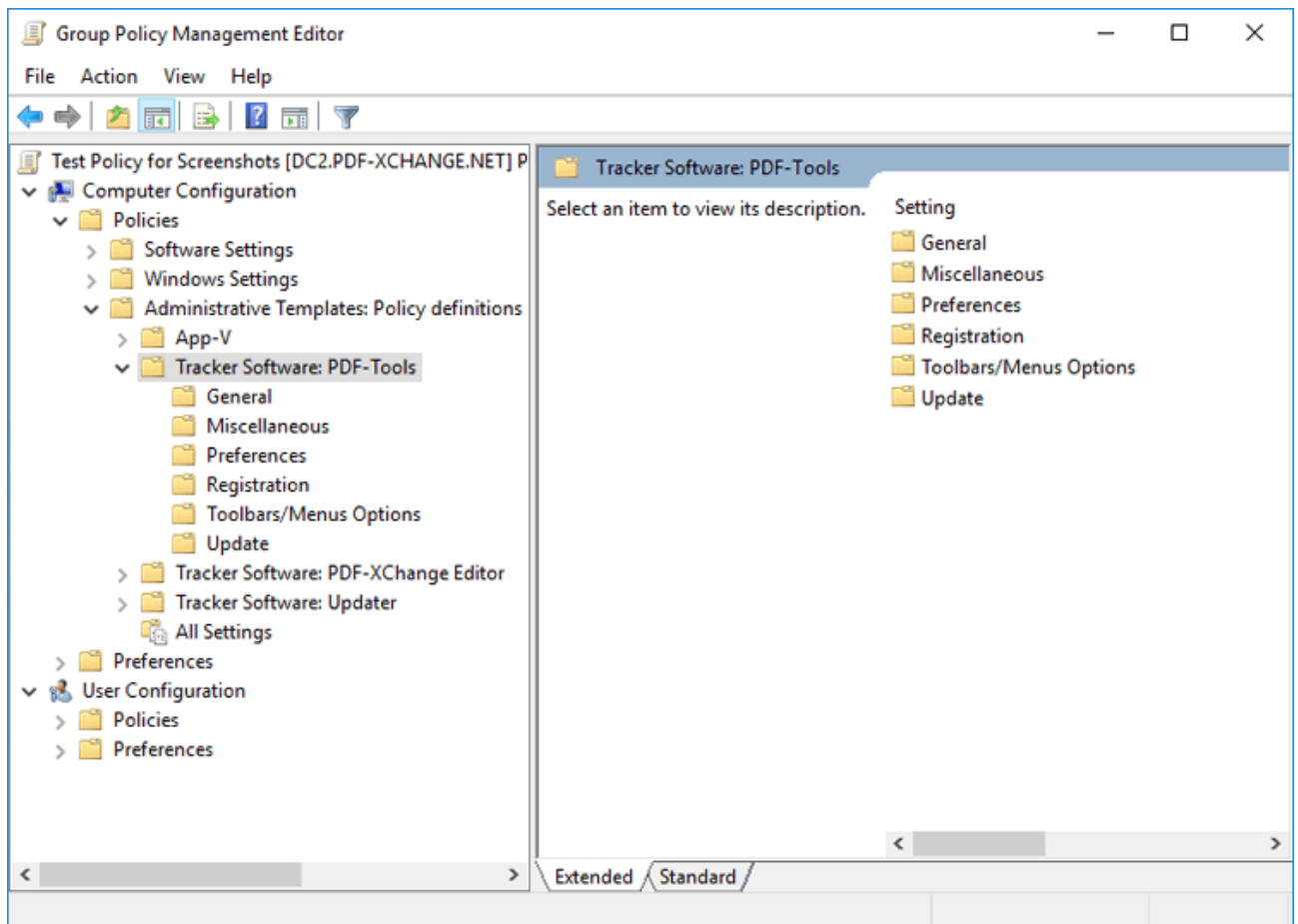
Figure 1. PDF-Tools Administrative Template Policies

Further information on each policy is available at the links below:

- **General** 302 - Policies to manage the availability and visibility of tools.

- **Miscellaneous** [309] - default paper size.
- **Preferences** [310] - show/hide Preferences Page(s)
- **Registration** [312] - manage how your license key is presented and updated.
- **Toolbar/Menu Options** [314] - policies to manage available commands.
- **Update** [316] - policy to manage updating the software.

6.4.3.1.1 General

General

Category:	General
Policy Name:	Allow Change List of Tools
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies whether or not PDF-Tools is allowed to add new tools/delete existing tools.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	b.CanEditToolList
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	General
Policy Name:	Allow Edit Tools
Requirements:	PDF-Tools v6.0.318 or later
Description:	Specifies whether or not PDF-Tools is allowed to change the options of existing tools.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	b.CanEditToolParams

Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	General
Policy Name:	Allow Export/Import Program Settings
Requirements:	PDF-Tools v6.0.318 or later
Description:	Specifies whether or not PDF-Tools is allowed to export/import its settings.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	b.CanImpExpSettings
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	General
Policy Name:	Custom Categories Visibility
Requirements:	PDF-Tools v6.0.322 or later
Description:	A list of identifiers of custom categories with their visibility factors. The list is a string of elements each separated by a pipe '|' character. Each element consists of two parts separated by a ':' (colon). The first part is the ID of the category and the second part is the visibility factor. Possible factor values are: 0 - hide; 1 - show; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.

Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.CustCatVisibility
Registry Key Type:	REG_SZ
Available Values:	custom Tool IDs. See **Category IDs and Names** for details.

Example

*:0|{17F9DA9C-0E4E-4276-B40FFD223D1F5397}:1 - to show only the custom category that has the specified ID.

Tip: Run **PDFXTools.exe** with the following command line to view the identifiers of all existing categories:

```
PDFXTools.exe /DumpCategories "c:\PDFTools_Categories.txt
```

Category:	General
Policy Name:	Custom Tools Access
Requirements:	PDF-Tools v6.0.318 or later
Description:	A list of identifiers of custom tools with their access modes. The list is a string of elements each separated by a pipe '|' character. Each element consists of two parts separated by a ':' (colon). The first part is the ID of the tool and the second part is the access mode. Possible factor values are: 0 - read-only (note that if this option is selected then it is not possible to edit the parameters of the tool); 1 - editable; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.CustToolsAccess

Registry Key Type:	REG_SZ
Available Values:	custom Tool IDs. See **Category IDs and Names** for details.

Example

*:0|{C57F2DF9-FC8C-4521-8E0F5A39AEAB8895}:1 - to prevent the changing of access modes for all custom tools except the custom tool specified.

Category:	General
Policy Name:	Custom Tools Visibility
Requirements:	PDF-Tools v6.0.318 or later
Description:	A list of identifiers of custom tools with their visibility factors. The list is a string of elements each separated by a pipe '|' character. Each element consists of two parts separated by a ':' (colon). The first part is the ID of the tool and the second part is the visibility factor. Possible factor values are: 0 - hide; 1 - show; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.CustToolsVisibility
Registry Key Type:	REG_SZ
Available Values:	custom Tool IDs. See **Category IDs and Names** for details.

Example

*:0|{C57F2DF9-FC8C-4521-8E0F5A39AEAB8895}:1 - to show only one custom tool that has the specified ID.

Category:	General
Policy Name:	Standard Categories Visibility
Requirements:	PDF-Tools v6.0.322 or later
Description:	A List of identifiers of standard categories with their visibility factors. The list is a string of elements each separated by a pipe '|' character. Each element consists of two parts separated by ':' (colon). The first part is the ID of the category and the second part is the visibility factor. Possible factor values are: 0 - hide; 1 - show; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.StdCatVisibility
Registry Key Type:	REG_SZ
Available Values:	createPDF, pages, comments, protection, optimizePDF, PDFStandard, exportPDF, advanced.

Example

*:0\|createPDF:1\|comments:1 - to show only the 'Create PDF' and 'Comments' categories.

Category:	General
Policy Name:	Standard Tools Access
Requirements:	PDF-Tools v6.0.318 or later
Description:	A list of identifiers of standard tools with their access modes. The list is a string of elements each separated by pipe '|' character. Each element consists of two parts separated by ':' (colon). The

	first part is the ID of a tool and the second part is the access mode. Possible access modes are: 0 - read-only (note that if this option is selected then it is not possible to edit the parameters of the tool); 1 - editable; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.StdToolsAccess
Registry Key Type:	REG_SZ
Available Values:	filesToPDF, imagesToPDF, scanToPDF, textToPDF, addWatermarks, addHeaderAndFooter, addBatesNumbering, addPagesBackground, cropPages, resizePages, rotatePages, ocrPages, extractPages, splitMergePDF, extractImagesFromPDF, pdfToImages, convertToPDFA, optimizePDF, securePDF, addDigSign, certifyPDF, addTimeStamp, overlayDoc

Example

*:0|imagesToPDF:1 - to prevent changing all standard tools except the 'Create PDF from Images' tool.

Tip: Run **PDFXTools.exe** with the following command line to view the identifiers of all existing tools:

```
PDFXTools.exe /DumpTools "c:\PDFTools_Tools.txt
```

Category:	General
Policy Name:	Standard Tools Visibility
Requirements:	PDF-Tools v6.0.318 or later
Description:	A list of identifiers of standard tools with their visibility factors. The list is a string of elements each separated by a '|' character. Each element consists of two parts separated by ':' (colon). The

	first part is the ID of tool and the second part is the visibility factor. Possible factor values are: 0 - hide; 1 - show; An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\General
Reg Key Name:	t.StdToolsVisibility
Registry Key Type:	REG_SZ
Available Values:	**filesToPDF, imagesToPDF, scanToPDF, textToPDF, addWatermarks, addHeaderAndFooter, addBatesNumbering, addPagesBackground, cropPages, resizePages, rotatePages, ocrPages, extractPages, splitMergePDF, extractImagesFromPDF, pdfToImages, convertToPDFA, optimizePDF, securePDF, addDigSign, certifyPDF, addTimeStamp, overlayDoc.**

Example

*:0|imagesToPDF:1|scanToPDF:1 - to show 'Create PDF from Images' and 'Scan to PDF' tools only.

6.4.3.1.2 Miscellaneous

Miscellaneous

Category:	Miscellaneous
Policy Name:	Default Paper Size
Requirements:	PDF-Tools v7.0.325 or later.
Description:	Specifies the default page size for creating or editing documents.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\Misc
Reg Key Name:	i.DefPaperIndex
Registry Key Type:	
Available Values:	A4, Letter/ANSI A, US legal, A3, Tabloid/ANSI B, ANSI C, ANSI D, ANSI E, ANSI F (Drop List)

6.4.3.1.3 Preferences

Preferences

Category:	Preferences
Policy Name:	Preferences Pages Access
Requirements:	PDF-Tools v6.0.318 or later.
Description:	A list of IDs of pages in the 'Preferences' dialog box with their access modes. The list is a string of elements each separated by the '|' pipe character. Each element consists of two parts separated by a ':' (colon). The first part is the ID of preference page and the second part is its access mode number. Possible access mode numbers are: 0 - hide; 1 - show (default setting); 2 - disable. An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\AppPrefs
Reg Key Name:	t.PagesAccess
Registry Key Type:	REG_SZ
Available Values:	Standard Page IDs: CustomUI, Identity, Languages, Measurement, Registration, Signatures.

Examples

Registration:0 - to hide the 'Registration' page.
*:0|CustomUI:1 - to show only the 'Custom UI' page.

6.4.3.1.4 Registration

Registration

Category:	Registration
Policy Name:	Allow Auto-upgrade Serial Keys
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies whether or not PDF-Tools is allowed to auto-upgrade all installed serial keys (requires an internet connection).
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\Registration
Reg Key Name:	b.CanAutoUpgradeSerials
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Category:	Registration
Policy Name:	Allow Copy Serial Key
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies whether or not users are allowed to copy serial keys to the clipboard on the Registration preferences page.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\Registration
Reg Key Name:	b.CanCopySerials

Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

6.4.3.1.5 Toolbar/Menu Options

Toolbars/Menus Options

Category:	Toolbars/Menus Options
Policy Name:	Commands Availability
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies the availability of some commands in toolbars/menus. An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\CmdOpts
Reg Key Name:	t.CmdAccess
Registry Key Type:	REG_SZ
Available Values:	Standard common identifiers: **tool.run, tool.edit, tool.clone, tool.create, delete, opts, help, search.**

Examples

tool.edit:0|tool.clone:0|tool.create:0|delete:0 - to disable 'Edit', 'Clone', 'Create', 'Delete' commands in toolbars/menus.
*:0|tool.run|search - to disable all commands except the 'Run' command and the search bar.

The example list of standard command identifiers:
tool.run, tool.edit, tool.clone, tool.create, delete, opts, help, search.

Category:	Toolbars/Menus Options

Policy Name:	Commands Visibility
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies the visibility of some commands in toolbars/menus. An asterisk '*' defines the level for all panels that are not explicitly mentioned in the list that follows it.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\CmdOpts
Reg Key Name:	t.CmdVisibility
Registry Key Type:	REG_SZ
Available Values:	Standard common identifiers: **tool.run, tool.edit, tool.clone, tool.create, delete, opts, help, search.**

Examples

tool.edit:0|tool.clone:0|tool.create:0|delete:0 - to hide 'Edit', 'Clone', 'Create', 'Delete' commands in toolbars/menus.
*:0|tool.run|search - to hide all commands except the 'Run' command and the search bar.

6.4.3.1.6 Update

Update

Category:	Update
Policy Name:	Allow User to Check for Updates for the application
Requirements:	PDF-Tools v6.0.318 or later.
Description:	Specifies whether or not users are allowed to check for updates to the application.
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\PDFXTools\6.0\Update
Reg Key Name:	b.AllowCheck
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Please note that the **PDF-Tools Administrative Template** policy detailed **here** may override this policy. If there is a conflict between update policies then the policy that disables updates will be given priority. For example, if updates are enabled in the **PDF-Tools** policy but disabled in the **Tracker Updater** policy, then updates will not be enabled. Or, if updates are enabled in the **Tracker Updater** policy but disabled in the **PDF-Tools** policy, then updates will not be enabled in **PDF-Tools.**

6.4.3.2   Category IDs and Names

Category IDs and Names

There are two sets of categories defined in **PDF-Tools.**

The first set of categories is the **Tools Categories,** which are used to organize the default tools into groups of similar functions:
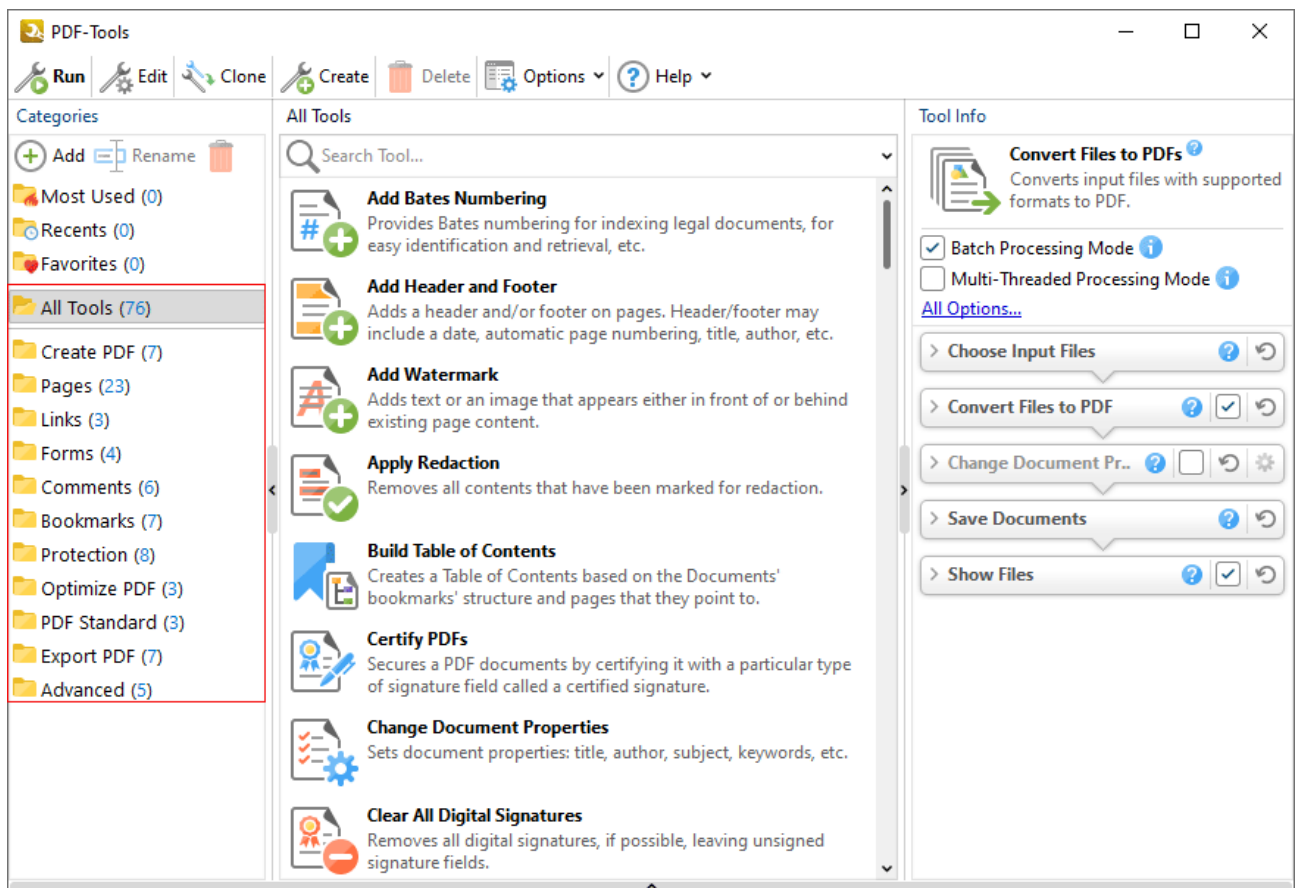
Figure 1. PDF Tools UI, Tool Categories Highlighted

The second set of preferences is the in **Preferences Categories,** which each contain a group of preferences for **PDF-Tools:**
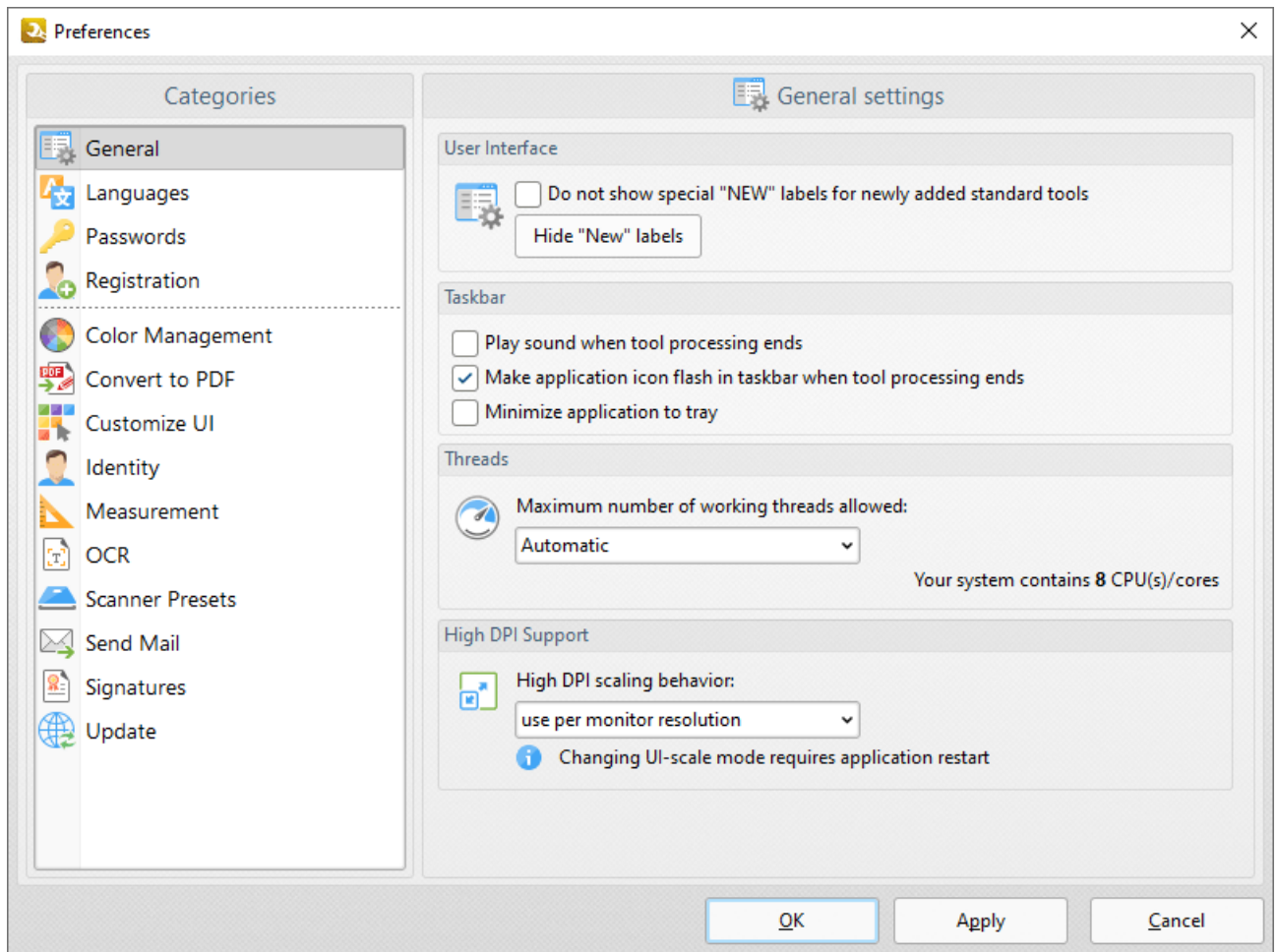
Figure 2. Tools Preferences

Tool Categories

Tool categories can be managed via the GUI or via Group policy. Custom categories can also be managed via Group Policy. You can use the **/DumpCategories** command line detailed below to view a list of all default and custom tool category IDs:

/DumpCategories

This command line saves identifiers of all existing tool categories to a plain text file.

Syntax

/DumpCategories <filename>

Parameters

<filename> - is the path to the text file where identifiers of all existing tool categories will be saved.

Example

C:\Program Files\Tracker Software\PDF Tools>PDFXTools.exe /DumpCategories "c:\dump\PDF-Tools.txt"

results in the following output:

```
===== Standard Categories (11) =====
  [pdft.toolcat.createPDF]: Create PDF
  [pdft.toolcat.pages]: Pages
  [pdft.toolcat.links]: Links
  [pdft.toolcat.forms]: Forms
  [pdft.toolcat.comments]: Comments
  [pdft.toolcat.bookmarks]: Bookmarks
  [pdft.toolcat.protection]: Protection
  [pdft.toolcat.optimizePDF]: Optimize PDF
  [pdft.toolcat.PDFStandard]: PDF Standard
  [pdft.toolcat.exportPDF]: Export PDF
  [pdft.toolcat.advanced]: Advanced

===== Custom Categories (1) =====
  [{63B7BB4B-6FD0-4A58-84BAB6DAAECDD032}]: Paul's Tools
```

Tool categories IDs are a necessary component when you are defining which tool categories to display via the Active Directory administrative template. The values from the **/Dump Categories** output file (with the pdft. section omitted) should be used for this purpose. For example, the value to use for the **Links** category is **toolcat.links** and the ID for the "Paul's Tools" custom category is **{63B7BB4B-6FD0-4A58-84BAB6DAAECDD032}**

Preferences Categories

Please note that it is not possible to use a command line to extract the preferences category IDs from the application. The list of **Preferences Category IDs** (as of build 8.0.331.0) is:

Accessibility
Assoc
ColorMan
Commenting
CustomUI
DocInfoBar
Docs
ExportConverters
Forms

FullScreen
General
Identity
ImportConverters
JavaScript
Languages
LaunchApp
Mail
Measurement
OCR
PageDisplay
PageText
Performance
Places
Plugins
Registration
Rendering
ScannerPresets
SearchProviders
Security
Signatures
Snapshot
Speech
Tools
Update

These are required when you are using the **Active Directory** administrative template to define which of the preferences categories users will be able to see in PDF-Tools, as detailed **here.** 310

7   PDF-XChange PRO

PDF-XChange PRO

PDF-XChange PRO

PDF-XChange PRO is a bundle package that contains **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard.** This section of the manual contains information on the **Deployment Planning, Installation, Updating** and **Customization** of **PDF-XChange PRO:**

- **Deployment Planning**
- **Installation** [323]
- **Updating** [342]
- **Customization** [343]

7.1 Deployment Planning

 Deployment Planning

PDF-XChange PRO is a bundle package that contains **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard.** These products are installed individually when **PDF-XChange PRO** is installed. It is important to consider the following factors before the installation of **PDF-XChange PRO:**

- Do you want to customize which plugins are installed with the applications?
- Do you want to change the name of the printer installed from the default name of **"PDF-XChange Printer Standard"?**
- Do you want **PDF-XChange Editor** to be set as the default application for viewing/editing PDF files?
- Do you want to set **PDF-XChange Editor** to open PDF files located in internet browsers?
- Do you want the printer installed to be set as the default system printer?
- Do you want to change the language of the user interface in the applications from the default setting (US English)?
- Do you want to install the software updater for the applications and create a schedule for updating?

You can use the .msi installation switches detailed **here** to determine these options.

7.2   Installation

Installation

PDF-XChange PRO is a bundle package that contains **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard.** These products are installed individually when **PDF-XChange PRO** is installed. Installers for **PDF-XChange PRO** are available as either an .exe or .msi installer. Further information on the merits of each format is available **here.** 12 Note that although .exe installers are available for **PDF-XChange PRO,** they are designed for single-user installations and do not utilize all the options or switches that are available to the .msi installers. This guide is intended for use with managed installations and therefore will refer only to the .msi installers.

Discrete installers for the current version of **PDF-XChange PRO** are always available at:

> **https://www.pdf-xchange.com/ProV10.x64.msi**
> **https://www.pdf-xchange.com/ProV10.x86.msi**

When you use an .msi to install a product, standard **Microsoft Syntax** is used to pass the .msi file as a parameter (along with the desired options) to the system executable **msiexec.exe.** Please note:

- If no options are specified then the default options will be used.
- If no features are specified then all features will be installed.
- The full UNC paths to the .msi installer and any supporting files should be used.
- Product features are specified using the **ADDLOCAL** standard .msi property.
- Product properties are specified using the **Product Specific Properties.**

A comprehensive list of the **PDF-XChange PRO** installer switches and their options is available **here.**

The standard options that the **PDF-XChange PRO** .msi installers use enable a consistent installation experience over a range of deployment methods. The switches and options remain the same whether they are assigned/published via **GPO, SCCM** or through third-party deployment tools. They are always applied via command line switches or through the modification of the .msi - either directly or using a transform file.

7.2.1 **Switches for MSI Installers**

Switches for MSI Installers

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

If you are using an older version of the software then please refer to the relevant user manual as the available switches may be different. All user manuals are detailed **here.**

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

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

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

Syntax

<Product.msi>

/j<u|m>

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

Syntax

<Product.msi>

Parameters

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

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

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

Display Options

/quiet

This switch installs the application without user interaction.

/passive

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

/q[n|b|r|f]

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

Restart Options

/norestart

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

/promptrestart

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

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

a - start up of actions.

c - initial UI parameters.

e - all error messages.

i - status messages.

m - out of memory or fatal exit information.

o - out of disk space messages.

p - terminal properties.

r - action-specific records.

u - user requests.

v - verbose output.

w - nonfatal warnings.

x - extra debugging information.

+ - append to existing file.

! - flush each line to the log.

* - log all information except for verbose output and extra debugging information.

/log

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

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

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

Modifiers

a - forces the reinstallation of all files.

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

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

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

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

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

p - only if a file is missing.

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

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

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

Standard Properties

ADDLOCAL

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

Syntax

ADDLOCAL=<list of features>

Features

- **F_Viewer** - **PDF-XChange Editor** and its main components.
- **F_Plugins** - the plugins module for **PDF-XChange Editor**. (This requires **F_Viewer**).
- **F_Plugin_SP** - the spell-checker plugin. (This requires **F_Plugins**).
- **F_FileOpenPlugin** - the security plugin that handles FileOpen DRM. (This requires **F_Plugins**).
- **F_ReadOutLoudPlugin** - the plugin that provides 'read-out-loud' functionality. (This requires **F_Plugins**).
- **F_EOCRAPlugin** - facilitates the use of the enhanced OCR features. (This requires **F_Plugins**).
- **F_OptimizerPlugin** - the plugin that optimizes PDF files.
- **F_BookmarksPlugin** - the plugin that facilitates the inclusion of advanced functionality for bookmarks. (This requires **F_Plugins**).
- **F_PDFAPlugin** - the plugin that converts PDF files into PDF/A format. (This requires **F_Plugins**).
- **F_SPPlugin** - the SharePoint plugin, which facilitates the use of files located on SharePoint servers. (This requires **F_Plugins**).
- **F_GDPlugin** - facilitates the use of files located on Google Drive™. (This requires **F_Plugins**).
- **F_OFCPlugin** - to install the plugin that allows the conversion of documents into MS Office formats directly within the software. (This requires **F_Plugins**).
- **F_IdentifyFormsPlugin** - the plugin that enables the detection and creation of form fields in documents converted to PDF. (This requires **F_Plugins**).
- **F_DBPlugin** - facilitates the use of files located on the DropBox™ cloud. (This requires **F_Plugins**).
- **F_OCRPlugin** - facilitates the use of the default OCR features. (This requires **F_Plugins**).
- **F_MDPlugin** - to install the plugin that enables the conversion of Markdown files into PDF documents. (This requires **F_Plugins**).
- **F_ODPlugin** - the plugin that enables working with files located on **Microsoft OneDrive.** (This requires **F_Plugins**).
- **F_BoxPlugin** - the plugin that enables working with files located on **Box.com.** (This requires **F_Plugins**).
- **F_3DPlugin** - the plugin that enables the viewing of embedded 3D content in PDF documents. (This requires **F_Plugins**).
- **F_ColorPlugin** - the plugin that enables the conversion of colors in PDF documents. (This requires **F_Plugins**).
- **F_CSVPlugin** - the plugin that enables the conversion of .csv files to tables in PDF documents. (This requires **F_Plugins**).

- **F_BrowserPlugins** - the plugin for web browsers that facilitates browser-based PDF file viewing. (This requires **F_Viewer,** as well as **F_IEPlugin** and/or **F_NPPlugin**).
- **F_NPPlugin** - the plugin for Firefox, Chrome, Safari and Opera. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_IEPlugin** - the plugin for Internet Explorer. (This requires **F_BrowserPlugins** and **F_Viewer**).
- **F_SanitizePlugin** – the plugin that enables the sanitization of documents. (This requires **F_Plugins**).
- **F_VLangs** - provides additional languages for the localization of **PDF-XChange Editor.** (This requires **F_Viewer**).
- **F_Tools** - the plugin for **PDF Tools** and its components.
- **F_Tools_Plugins** - the plugins that extend the functionality of **PDF Tools.** (This requires **F_Tools**).
- **F_TLangs** - provides additional languages for the localization of **PDF Tools**. (This requires **F_Tools**).
- **F_Drivers** - **PDF-XChange Printer Standard Printer** and related components.
- **F_Office2PDF** - the **Office to PDF** facility, which enables the batch-conversion of **MS Office** documents to PDF. (This requires **F_Drivers**).
- **F_OfficeAddin** - provides extended support for **MS Office** applications when converting documents to PDF. (This requires **F_Drivers**).
- **F_IEAddin** - the add-in for MS Internet Explorer that facilitates the conversion of web pages to PDF format. (This requires **F_BrowserExts**).
- **F_Langs_Drv** - language localization files for the **PDF-XChange Printer Standard** printer driver, the **Office Addin** and the **Office2PDF** feature. (This requires **F_Drivers**).
- **F_ShellExt** - the plugins for **Windows Explorer** and **Windows** shell. These extensions enable the viewing of PDF thumbnails in **Windows Explorer,** display PDF file properties, handle the previewing of PDF files in **Windows Vista** and **Office 2007** and provide the **IFilter** component, which allows the **Windows Desktop Search** to operate within PDF files.
- **F_Updater** - the updater for **PDF-XChange** products. The updater checks automatically for updates to the software.
- **F_KeyInstaller** - the key installer for **PDF-XChange** products.
- **F_BrowserExts** - plugin for browsers that enables the conversion of web pages into PDF files.
- **F_ChromeExt** - extension for Chrome browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).
- **F_EdgeExt** - extension for Edge browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).

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

Product Specific Properties

PNAME

This property specifies the name of the printer to be used. The default value is "PDF-XChange Standard."

Syntax

PNAME=<printer name>

INSTALLLOCATION

This property specifies the installation folder.

Syntax

INSTALLLOCATION=<installation folder>

SET_PRINTER_AS_DEFAULT

When specified with a value of "1" the **PDF-XChange Printer Standard** printer will be set as the default printer after installation. If this property is not specified then the **PDF-XChange Printer Standard** printer will not be set as the default printer.

Syntax

SET_PRINTER_AS_DEFAULT="0"

SET_AS_DEFAULT

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

Syntax

SET_AS_DEFAULT="0"

VIEW_IN_BROWSERS

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

Syntax

VIEW_IN_BROWSERS ="0"

DESKTOP_SHORTCUTS

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

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

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

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

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

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

This property specifies a language for **PDF-XChange Editor, PDF-Tools** and the **PDF-XChange Printer Standard** printer. (This requires **F_Vlangs** in order to operate for **PDF-XChange Editor, F_TLangs** in order to operate for **PDF-Tools,** and **F_Langs_Drv** to operate for **PDF-XChange Printer Standard**). This property uses the "language culture name" to define languages. For example German is "de-DE". The **<id>** for target languages is available **here.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses

US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

NOUPDATER

If this property is unspecified, or specified with a value of "0", then the **PDF-XChange Updater**⌷350⌷ will be installed. If specified with a value of "1" then the updater will not be installed. (Available from build 310).

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

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

Syntax

SCHEDULEUPDATER=<0>

MSI Installer Examples

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

```
msiexec /i ProV10.x64.msi /quiet INSTALLLOCATION="C:\Program Files\My PDF
Applications"
```

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

```
msiexec /i ProV10.x64.msi /qb USERNAME="John Doe" USERMAIL="abc@a.b.c"
KEYDATA="PVP60-….+XivqqLSozuRTqTCxnRv0sNR1i2UTPSA5AvAUl4Q="
```

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

  ```
  msiexec /i ProV10.x64.msi /qn USERNAME="John Doe" USERMAIL="abc@a.b.c"
  KEYFILE="\valid\UNC\path\to\vault\file.xcvault"
  ```

- Install only **PDF-XChange, Office Add-In** and **PDF Tools,** and specify a new name for the printer:

  ```
  msiexec /i ProV10.x64.msi /qb ADDLOCAL="F_Drivers,F_OfficeAddin,F_Tools"
  PNAME="My PDF Printer"
  ```

- Install all products with German as the application UI language. (If **ADDLOCAL** is not called then all features, including all languages, are available to the installer and the following properties can be used. If **ADDLOCAL** is used to specify components and an alternative language is to be used then corresponding language components (**F_Vlangs, F_Langs_Drv** and/or **F_TLangs**) must be explicitly called:

  ```
  msiexec /i ProV10.x64.msi /quiet APP_LANG=de-DE
  ```

7.2.2 **Switches for EXE Installers**

Switches for EXE Installers

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

The command line for installation is: **PDFXPRO9.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

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

Install Options

/install

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

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

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

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

/quiet

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

/passive

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

Restart Options

/norestart

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

Logging Options

/log

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

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

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

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

SET_AS_DEFAULT

If this property is not specified, or is specified with a value of "1", then **PDF-XChange Editor** will be set as the default application for viewing PDF files.

Syntax

SET_AS_DEFAULT="0"

VIEW_IN_BROWSERS

If this property is not specified, or is specified with a value of "1", **PDF-XChange Editor** will be configured to open PDF files within browsers.

Syntax

VIEW_IN_BROWSERS="0"

APP_LANG

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

Syntax

APP_LANG=<id>

DESKTOP_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

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

Syntax

KEYFILE=<path to xcvault file>

NOUPDATER

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

Syntax

NOUPDATER="0"

EXE Installer Examples

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

  ```
  PDFXPRO9.exe /quiet
  ```

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

  ```
  PDFXPRO9.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c"
  KEYFILE="C:\license\V10Pro.xcvault"
  ```

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

  ```
  PDFXPRO9.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c"
  KEYDATA="PVP60 - ZJ2J77DN5kdBuQRhj ...
  dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

7.3   Updating

Updating

The products that **PDF-XChange PRO** contains - **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard** - all utilize the **PDF-XChange Updater** to check for and download updates. Further information about the updating process for these products is available on their respective **Updating** pages at the following links:

- **PDF-XChange Editor** 109
- **PDF-Tools** 280
- **PDF-XChange Printer Standard** 227

7.4 **Customization**

Customization

The products that **PDF-XChange PRO** contains - **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard** - can all be customized in various ways including the UI style, deployment options, defining/enforcing specific options and methods for sharing settings and customized tools. Note that as these are three individual products it is necessary to customize them individually. Further information about the customization process for these products is available on their respective **Customization** pages at the following links:

- **PDF-XChange Editor** 120
- **PDF-Tools** 291
- **PDF-XChange Printer Standard** 229

7.4.1   **Active Directory Administrative Templates**

Active Directory Administrative Template

There is no **Active Directory** administrative template for **PDF-XChange PRO** as it is a bundle product that contains **PDF-XChange Editor, PDF-Tools** and **PDF-XChange Printer Standard.** Therefore, the templates for **PDF-XChange Editor, PDF-Tools** and the **PDF-XChange Updater** templates should be used instead. (Note that the virtual printers that **PDF-XChange Printer Standard** use do not have an associated administrative template). Further information on the templates for these products are available at the links below:

- **PDF-XChange Editor** [136]
- **PDF-Tools** [299]
- **PDF-XChange Updater**

7.5   SharePoint Integration

 Integration with Microsoft SharePoint

The **PDF-XChange PRO** suite includes integration of **PDF-XChange Editor** into **SharePoint Online.** This means that when users are browsing a **SharePoint Online** document library in a supported Chromium-based web browser **(Edge, Chrome, Brave etc),** they can use the **"Open in PDF-XChange Editor"** functionality detailed in the user interface.

Please note that **SharePoint On Premise** does not offer the functionality required to support this integration, and that will remain the case unless **MicroSoft** change the related policy.
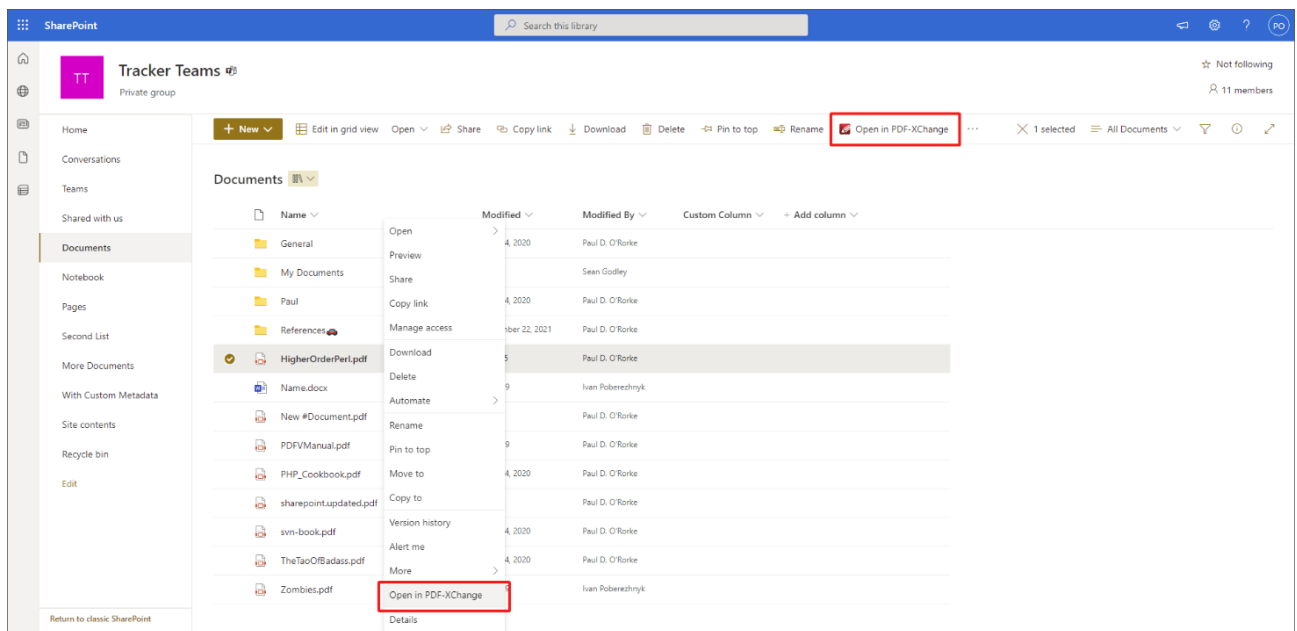
Figure 1. PDF-XChange SharePoint application,"Open in PDF-XChange Editor" functionality highlighted.

The following components are required in order to use this functionality:

1. **License**

   A licensed installation of **PDF-XChange PRO** on the machine used to browse the document library. This functionality is a **PDF-XChange Pro** premium feature, and therefore a valid **PDF-XChange PRO** license is required.

2. Server-Side App

Our server-side application installed on your **SharePoint Online** tenant. This can be found in the **SharePoint** store when searching for **"PDF-XChange".**

3. Browser Extension

The PRO version of the **PDF-XChange** Chromium extension in your web browser. The **PDF-XChange** extension found in the various extension repositories for Chromium browsers does not include the required components to integrate into **SharePoint**. The **PDF-XChange PRO** installer puts this additional functionality in your browser by default during the installation **PDF-XChange PRO.**

4. The 'Local Part'

The "local part" of the tool. This is a component that is installed on the user's machine during a **PDF-XChange PRO** installation. It has the role of passing the file to **PDF-XChange Editor** in a manner that allows the use of the SharePoint tools for checking in/out etc.

Further information on the installation and setup of the SharePoint browser integration is available **here.**

7.5.1   **SharePoint Browser Integration Installation and Setup**

SharePoint Browser Integration Installation and Setup

The following components are required in order to use this functionality:

1. **License**

    A licensed installation of **PDF-XChange PRO** on the machine used to browse the document library. This functionality is a **PDF-XChange Pro** premium feature, and therefore a valid **PDF-XChange PRO** license is required.

2. **Server-Side App**

    Our server-side application installed on your **SharePoint Online** tenant. This can be found in the **SharePoint** store when searching for **"PDF-XChange".**

3. **Browser Extension**

    The PRO version of the **PDF-XChange** Chromium extension in your web browser. The **PDF-XChange** extension found in the various extension repositories for Chromium browsers does not include the required components to integrate into **SharePoint**. The **PDF-XChange PRO** installer puts this additional functionality in your browser by default during the installation **PDF-XChange PRO.**

4. **The 'Local Part'**

    The "local part" of the tool. This is a component that is installed on the user's machine during a **PDF-XChange PRO** installation. It has the role of passing the file to **PDF-XChange Editor** in a manner that allows the use of the **SharePoint** tools for checking in/out etc.

License

The necessary functionality is available for only **PDF-XChange PRO** license holders. The **PDF-XChange PRO** installer must be run in order to install all the required components for **SharePoint** browser integration.

Server-Side App

The server-side application is available in the **SharePoint Store:**
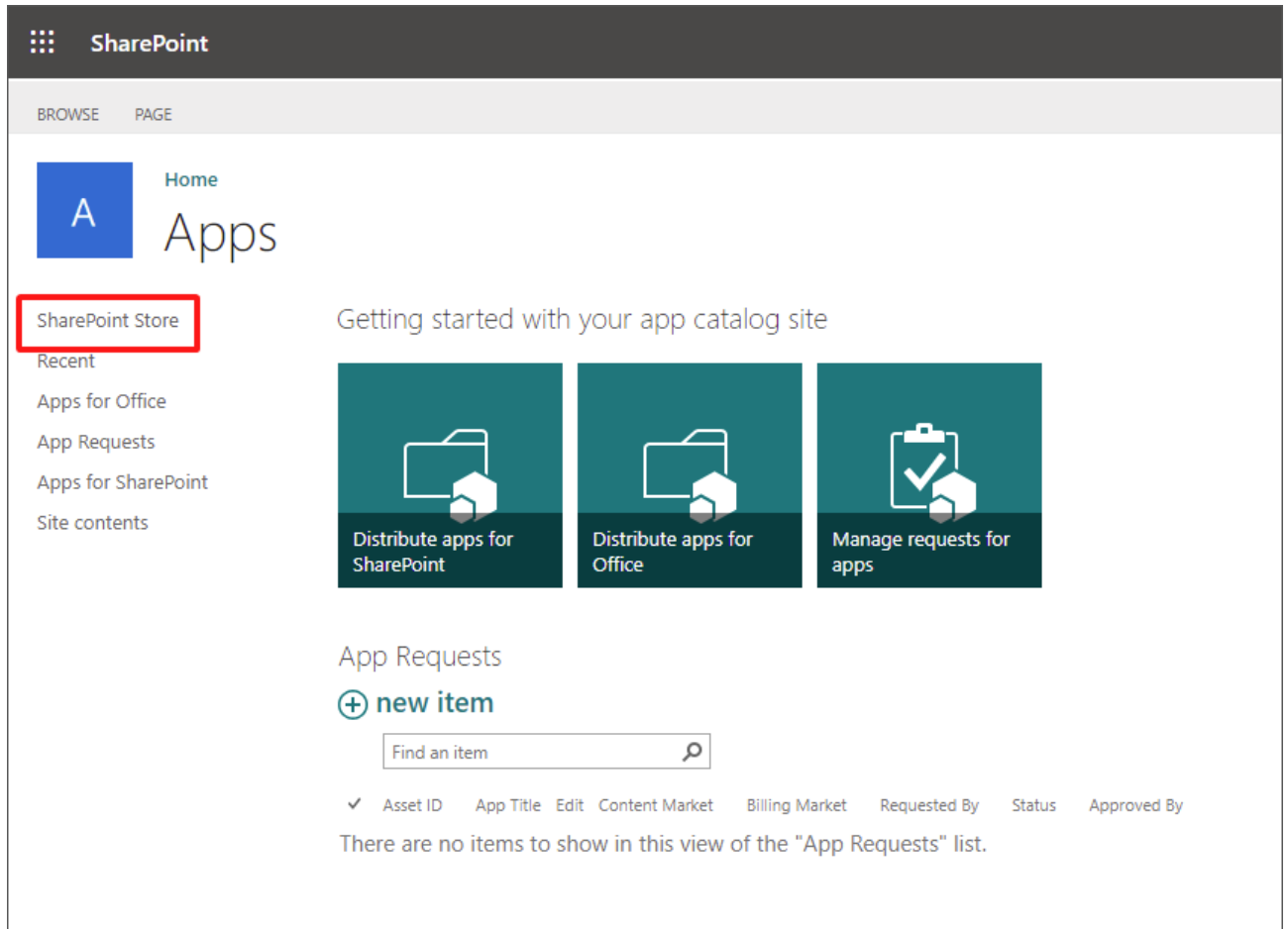
Figure 1. SharePoint Store

Search for **'PDF-XChange'** in the **SharePoint Store** to locate the application, or request the package file directly from **support@pdf-xchange.com.** Note that this is a server-side application in the **SharePoint Store,** and not the **PDF-XChange Editor** extension published in the **Microsoft Store,** which is for opening **non-SharePoint** PDFs hosted on web servers.

Searching the **SharePoint Store** for **'PDF-XChange'** will return the following results:
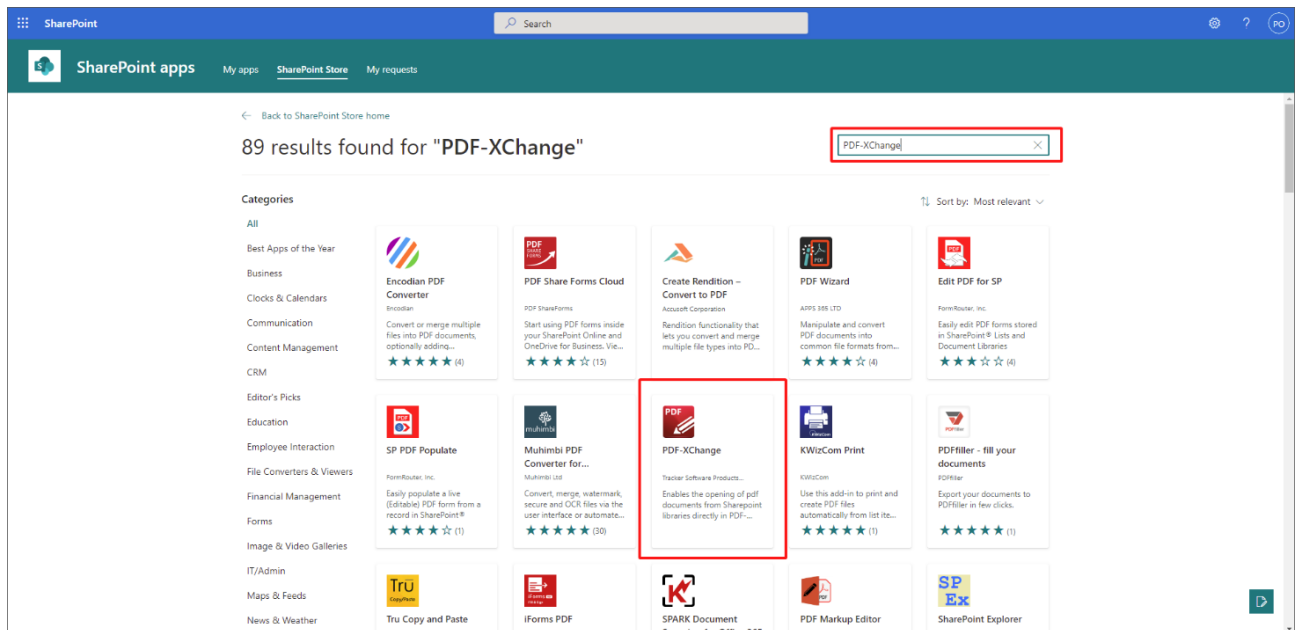
Install **PDF-XChange** on your **SharePoint Online** site.

Browser Extension

Run the installer for your **PDF-XChange PRO** license on the target device to install the complete browser extension. Please note that the browser extensions available in the various browser stores does not include the **SharePoint Integration** functionality, which is only available via the **PDF-XChange PRO** installer. The only way to have this extension with **SharePoint** functionality is to run a **PDF-XChange Pro** installer.

Local Part

This is also performed by the **PDF-XChange Pro** installer.

Conclusion

The browser integration between **PDF-XChange** and **SharePoint** requires the server side application and a licensed, local installation of **PDF-XChange PRO.**

Note that the 64 bit MSI installer for **PDF-XChange Pro** is available **here.**

8 **The PDF-XChange Updater**

The PDF-XChange Updater

This section of the manual contains information on **The PDF-XChange Updater:**

- **Invoking the Updater** 351
- **Using the Updater** 355
- **Available Policies** 360

8.1 Invoking the Updater

Invoking The PDF-XChange Updater

The **PDF-XChange Updater** is used to check for and download updates to the **PDF-XChange Software** applications. Users can follow the steps below to access and edit settings for the **PDF-XChange Updater:**

⊟ **PDF-XChange Editor**

Click the **Help** tab, then click **Check for Updates:**
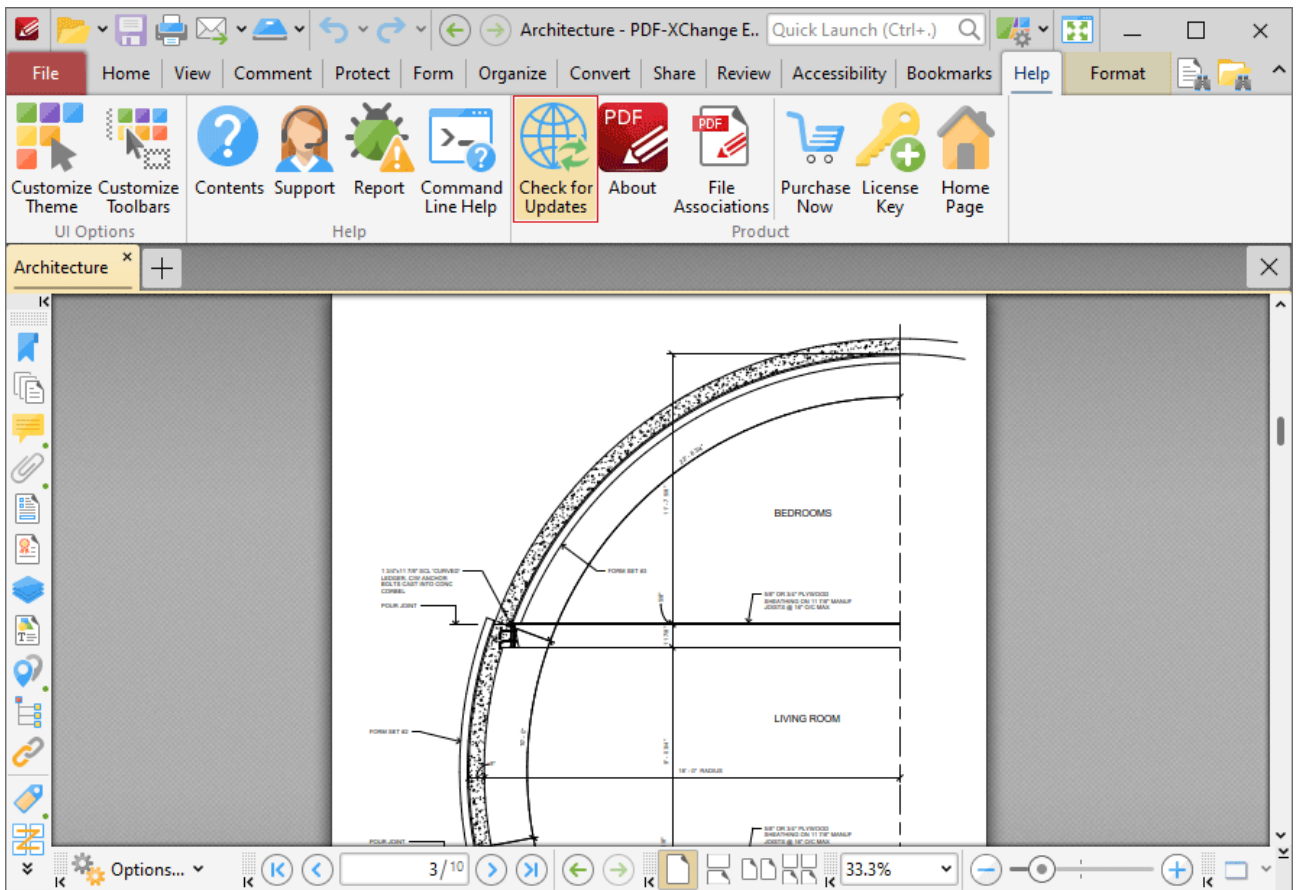
Figure 1. Help Tab, Check for Updates

The **PDF-XChange Update** dialog box will open, as detailed **here.** 355

PDF-XChange Editor, Classic UI

Click the **Help** tab, then click **Check for Updates:**
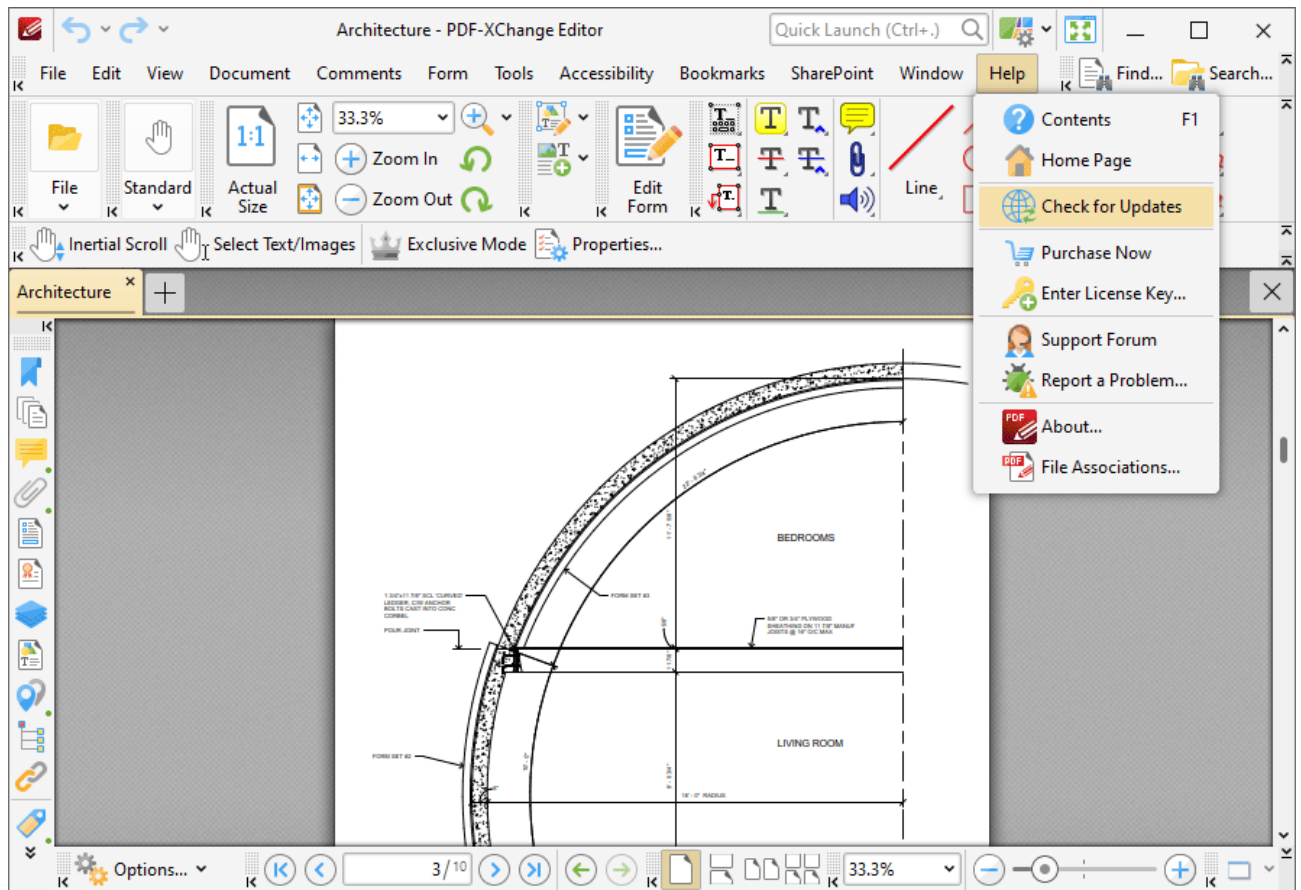
Figure 2. Help Tab, Check for Updates

The **PDF-XChange Update** dialog box will open, as detailed **here.** 355

☐ **PDF-Tools**

Click the **Help** dropdown menu, then click **Check for Updates:**
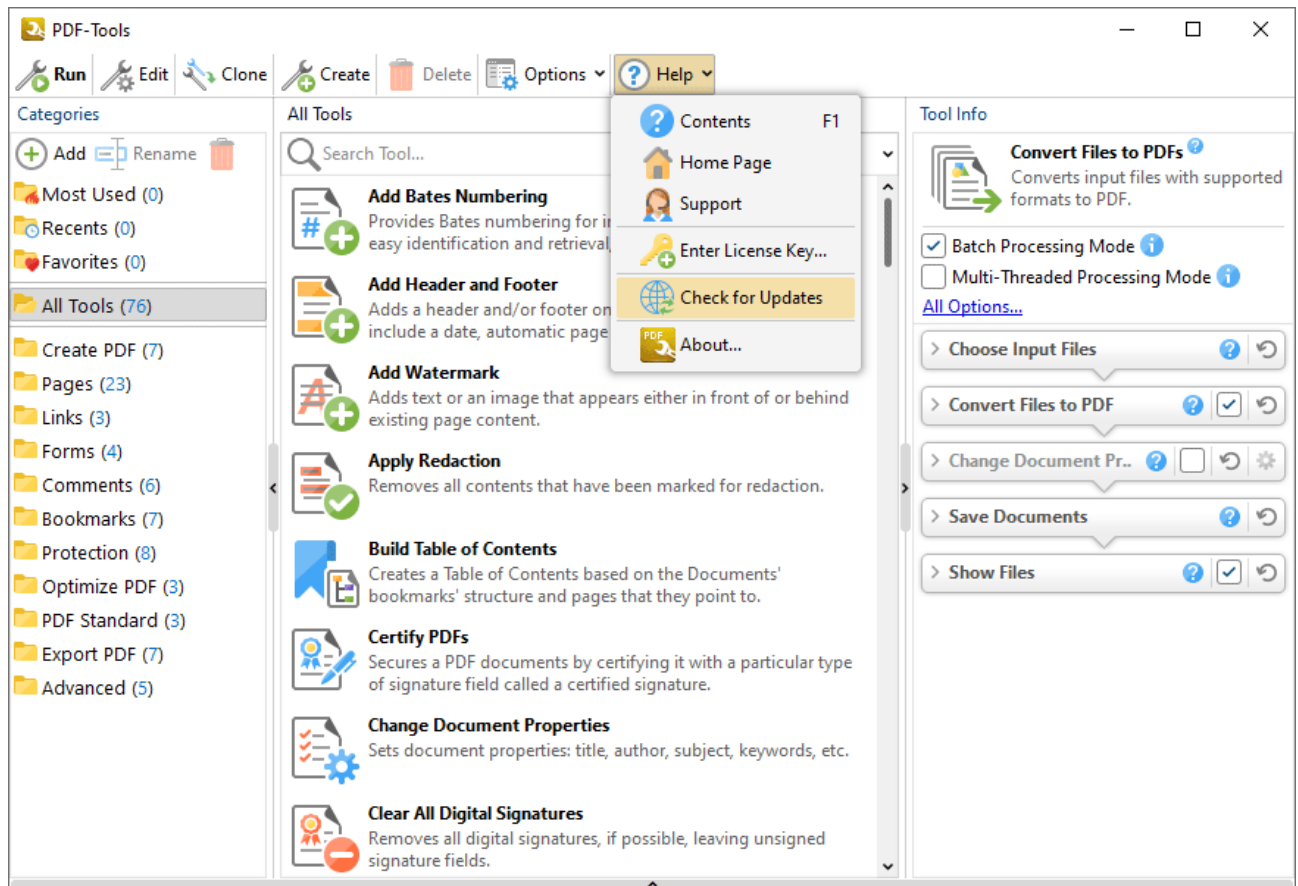
Figure 3. Help Dropdown Menu, Check for Updates

The **PDF-XChange Update** dialog box will open, as detailed **here.** 355

◻ **PDF-XChange Standard**

1. Click the **Windows Start Button**.

2. Click **Control Panel.** The **Control Panel** dialog box will open.

3. Click **Devices and Printers** in the **Control Panel** dialog box.

4. Move to the **Printers** tab and right-click **PDF-XChange Printer Lite.**

5. Click **Printing Preferences**. The **PDF-XChange Printer Lite Printing Preferences** dialog box will open.

6. Click the **About** tab, then click **Check for Updates** in the **Help** dropdown menu to open the **PDF-XChange Updater:**
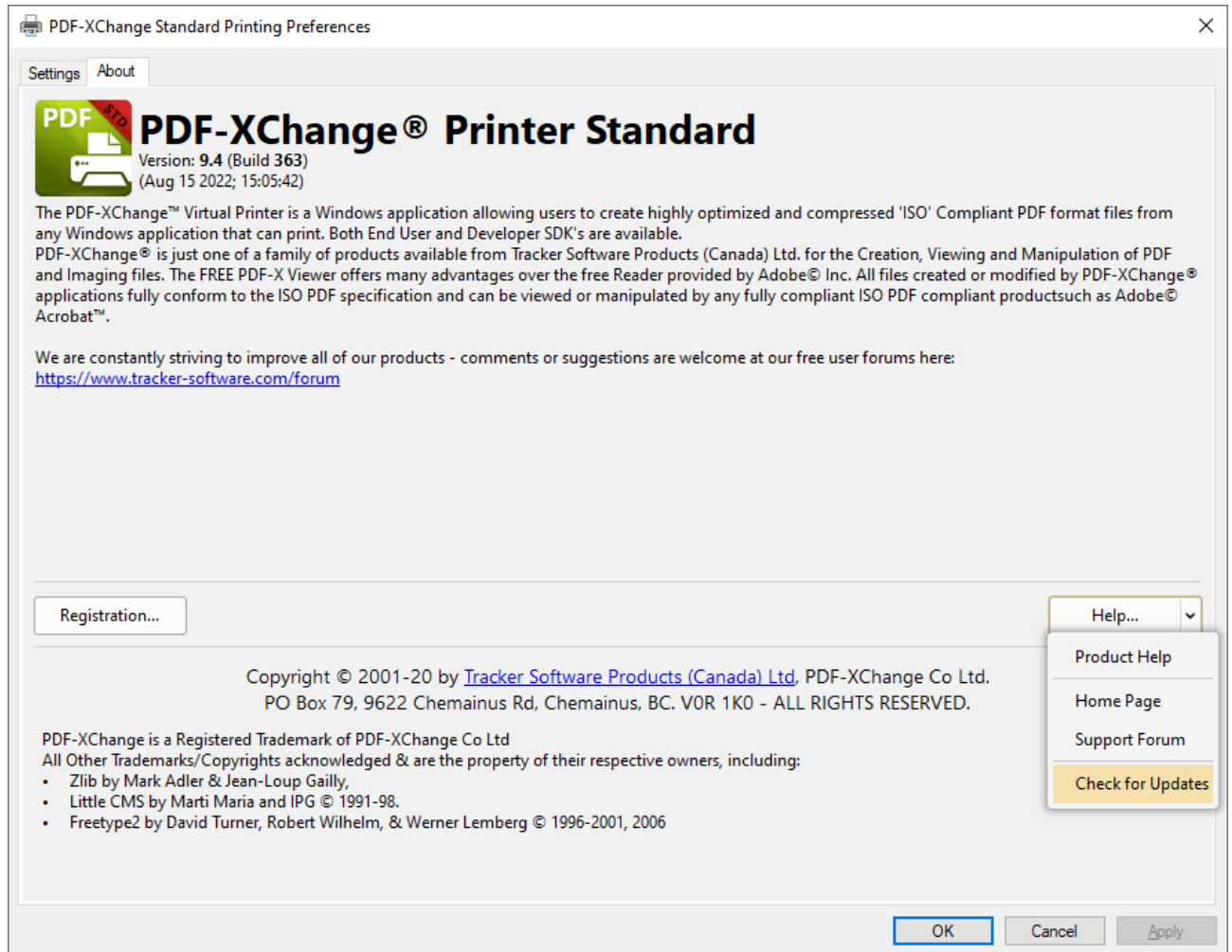
Figure 4. About Tab, Check for Updates

The **PDF-XChange Update** dialog box will open, as detailed **here.** 355

8.2   Using the Updater

Using the Updater

The **PDF-XChange Updater** interface appears as detailed below:
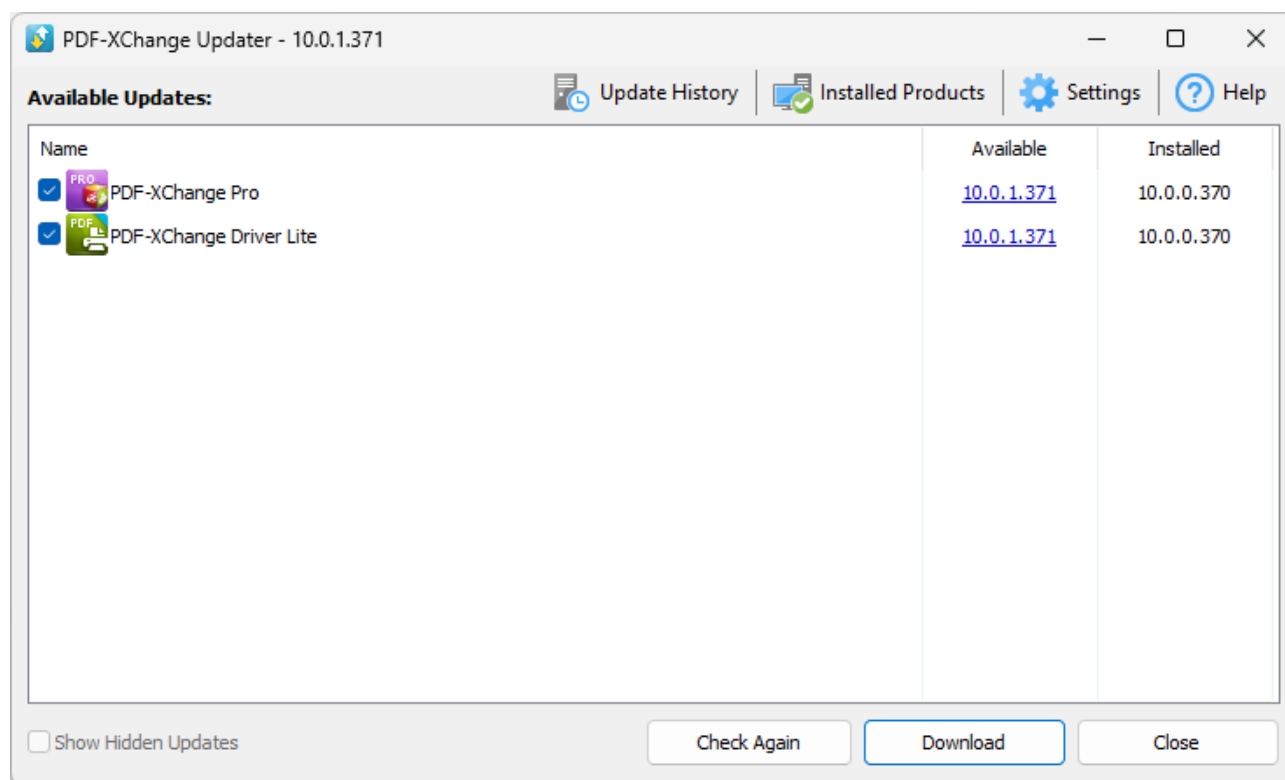
Figure 1. PDF-XChange Update Dialog Box

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

- Click **Close** to close the **PDF-XChange Updater** dialog box.

Settings
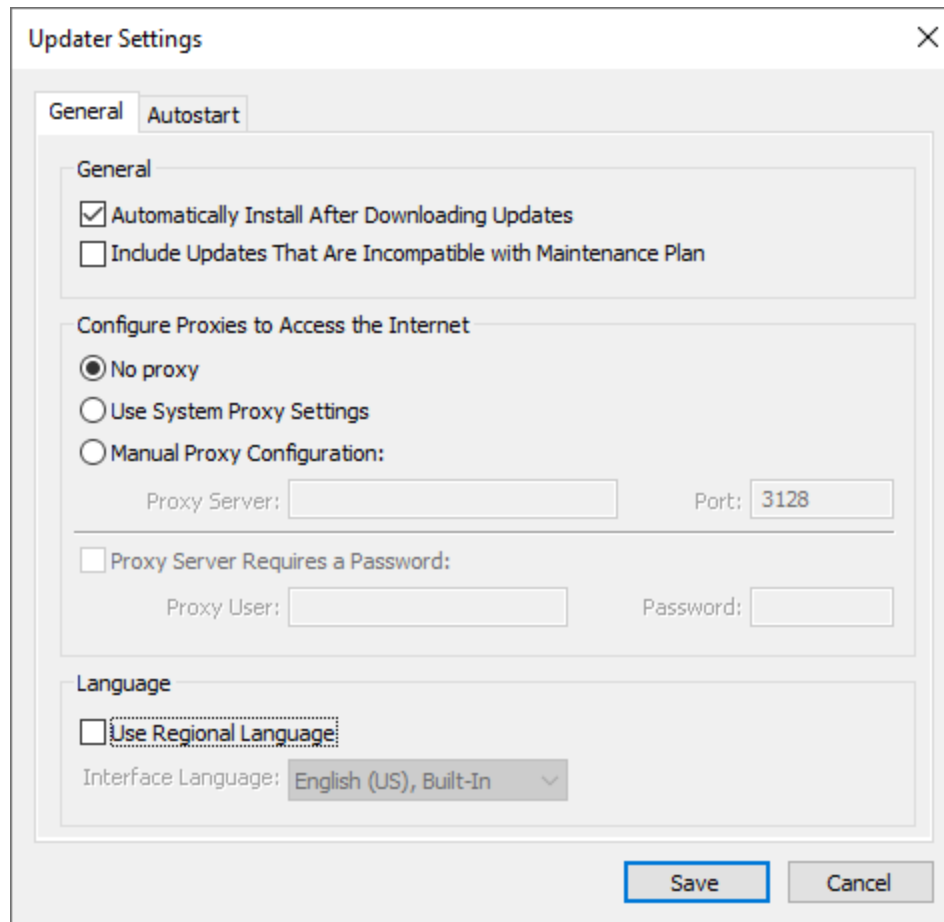
Figure 2. Updater Settings Dialog Box

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

- Select the **Proxy Server Requires a Password** box to set a password for the use of **Proxy Server** when the **Manual Proxy Server** option above is used, then enter the **Proxy User** and **Password** details in the text boxes.
- Select the **Use Regional Language** box to use the regional language as the interface language for downloaded updates, or select a different option from the dropdown menu. Note that the language of the user interface can be subsequently changed as desired in the user preferences.
- Click **Save** to save settings.

Autostart

Use the **Autostart** tab to set a schedule for automatically checking for updates to the software:

Figure 3. Updater Settings Dialog Box, Autostart Tab

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

- Select **Automatically Download Available Updates** to download available updates automatically, or select **Only Show Notification** to receive a notification that updates are available instead.

Click **Save** to save settings.

8.3 Active Directory Administrative Templates

Active Directory Administrative Template

There is an **Active Directory** administrative template available to manage the **PDF-XChange Updater** that is installed in all **PDF-XChange** products by default. It comes in two files: **TrackerUpdater.admx** and **TrackerUpdater.adml**.

A permanent link to a zip archive of all the templates is available **here.**

Further information on where to put these files to make them available to your domain controller is available **here.**

8.3.1 **Available Policies**

Available Policies

The following policy is available in the administrative template for the **PDF-XChange Updater:**

Category:	General
Policy Name:	Disabled
Requirements:	Tracker Updater v6.0.318 or later
Description:	Specifies whether or not end-users are permitted to use the PDF-XChange Updater
Reg Key Location:	HKEY_LOCAL_MACHINE\Software\Policies\Tracker Software\Updater\General
Reg Key Name:	b.Disabled
Registry Key Type:	REG_DWORD
Available Values:	"1" – enabled, "0" – disabled

Enable this policy (i.e. set it to "1") to prevent the **PDF-XChange Updater** from running:
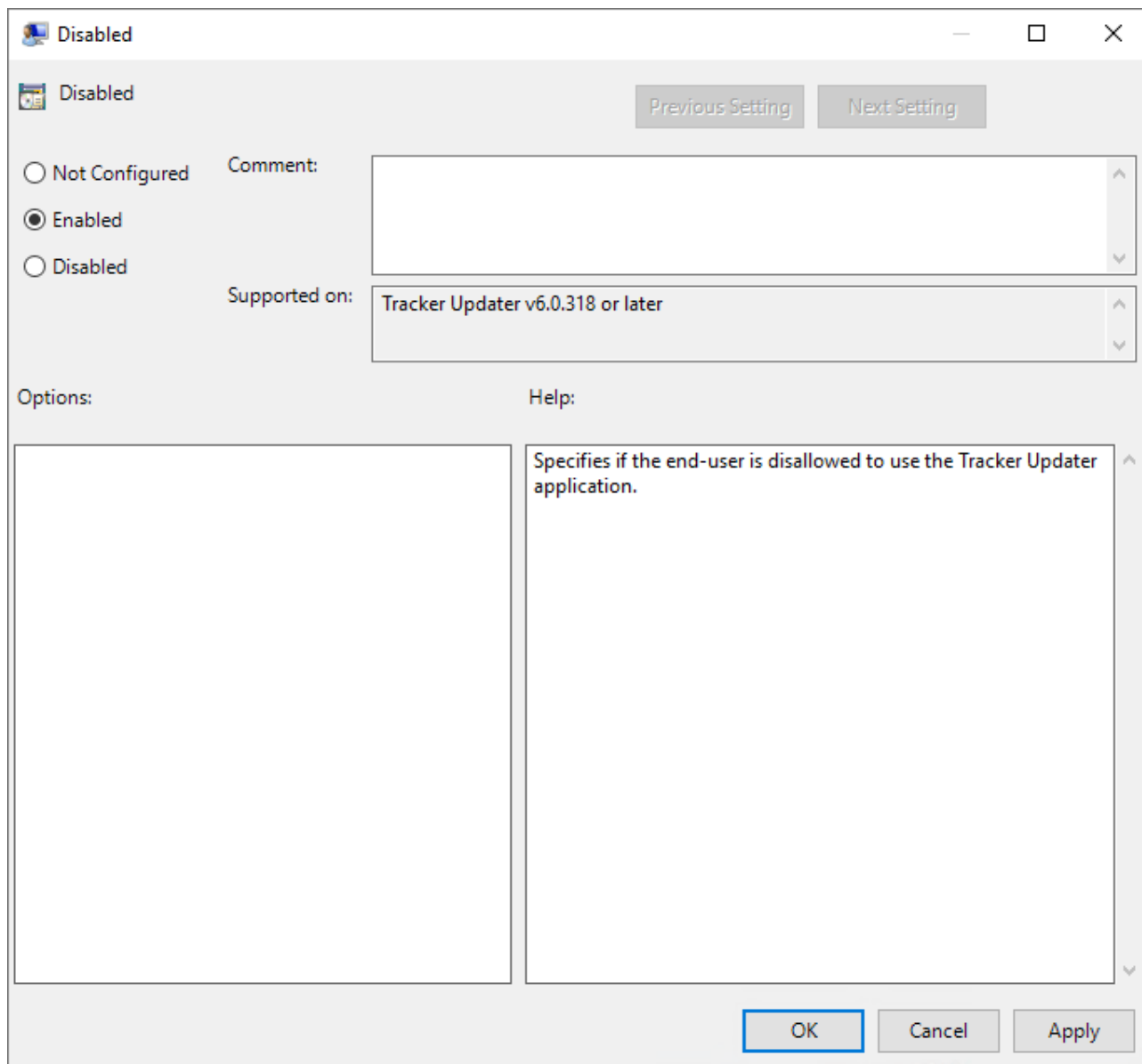
Figure 1. Disabled Policy

Please note that when this policy is enabled it overrides the individual update policies for **PDF-XChange Editor** and/or **PDF-Tools.** These policies are detailed **here**[111] and **here** respectively.

For example, if updates are enabled in the **PDF-XChange Editor** and/or **PDF-Tools** policies but disabled in the **Tracker Updater** policy, then updates will not be enabled. Additionally, if updates are enabled in the **Tracker Updater** policy but disabled in the **PDF-XChange Editor** and/or **PDF-Tools** policies, then updates will not be enabled in **PDF-XChange Editor** and/or **PDF-Tools.**

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