

Qoppa Software

PDF Studio 10 User Guide

Affordable, Powerful PDF Software for Windows, Mac, Linux

Table of Contents

Welcome to PDF Studio	15
What's New	16
System Requirements.....	22
PDF Studio Installation Instructions.....	23
Registration / Unregistration / Transfer	25
Getting Started with PDF Studio	27
PDF Studio Toolbar	28
Mini Toolbar	36
Quick Properties Toolbar	36
Recent File History	37
Keyboard Shortcuts.....	38
Selecting Text	41
Selecting Objects	42
Snapshot Tool	42
Text Search	43
Printing PDFs.....	44
General Preferences	48
Comments Preferences.....	49
Display Preferences	49
Email Preferences	51
Fonts Preferences	53
Forms Preferences.....	54

JavaScript Preferences	55
OCR Preferences.....	56
PDF/A Preferences.....	56
Print Defaults Preferences.....	57
Rulers & Grids Preferences	58
Scan Preferences	59
Text to PDF Preferences	59
Toolbar Preferences	60
Update Preferences	61
Digital IDs Preferences	62
Timestamp Servers Preferences	62
Trusted Certificates Preferences	63
Touch Mode	63
Undo.....	64
Creating PDFs.....	67
Creating a Blank PDF	67
Converting Word to PDF	68
Converting Images to PDF.....	68
Converting Text to PDF.....	68
Merging/Converting Multiple Files to PDF.....	69
Drag and Drop to Create PDF.....	70
WIA/ICA Scanning.....	72
TWAIN Scanning	74

Sane Scanning.....	76
Supported File Types	78
Viewing and Comparing PDFs	79
Navigating.....	79
Zooming.....	82
Setting Page Layout	83
Rotating Page View	84
Loupe Tool.....	84
Pan and Zoom Tool.....	85
Reading Mode.....	86
Invert Colors	87
PDF Layers	87
Show/Hide Layers.....	88
Adding a Blank Layer.....	89
Importing PDF as Layer.....	89
Assigning Comments to Layers	90
Flattening Comments on Layer.....	91
Layer Properties	92
Side by Side Comparison.....	92
Choosing Colors for Overlay Comparison	96
Annotating and Commenting PDFs	97
Creating Annotations	98
Text Box Annotations.....	99

Callout Annotations	101
Sticky Note Annotations	103
Typewriter Annotations	104
Circle Annotations	107
Square Annotations	108
Line Annotations.....	110
Arrow Annotations.....	111
Pencil Annotations	113
Polygon Annotations.....	115
Cloud Annotations	117
Polyline Annotation	119
Text Highlight Markup	121
Cross Out Text Markup	122
Text Underline Markup.....	124
Squiggly Underline Text Markup	125
Text Insert Markup	127
Replace Text Markup.....	128
Area Highlight	130
Rubber Stamp Annotation.....	132
Rotating a Rubber Stamp	134
Managing Rubber Stamps.....	135
Creating a Text Stamp	136
Creating an Image Stamp.....	137

Creating a Custom Stamp	139
Importing Image as Stamp	141
Distance Annotation.....	142
Perimeter Annotation	144
Area Annotation.....	146
Calibrating Measurement Annotations	148
Image Annotation.....	149
Sound Annotation	150
Creating Links.....	152
Custom Link Actions	153
Auto Create Links	156
Removing all Links.....	157
Attaching a File.....	158
Attaching a File as a Comment.....	158
Opening Attached File	159
Saving Attached File.....	160
Deleting Attached File	160
Moving & Resizing Annotations	161
Deleting Annotations	162
Editing the Annotation Comment	162
Annotation Properties Dialog	163
Flattening Annotations.....	163
Pasting Clipboard Images as a Stamp.....	164

Pasting Clipboard Text as a Text Box	165
Aligning Annotations.....	165
Group Annotations.....	166
Setting Annotation Tool Properties	167
Setting a Status or Check mark.....	167
Comments Panel	168
Saved Comments	169
Recent Comments	170
Importing Annotations	171
Exporting Annotations	172
Editing and Manipulating PDFs.....	173
Editing Text Content.....	174
Editing Image Content	176
Editing Path Content.....	178
Redaction Annotations.....	180
Redaction Properties	182
Applying Redactions.....	183
Cropping Pages	186
Appending Documents.....	187
Inserting Pages	188
Extracting Pages.....	189
Replacing Pages	189
Deleting Pages	190

Rotating Pages	190
Reversing Pages	192
Move, Cut, Copy, & Paste Pages	192
Import Images as Pages	193
Splitting a PDF	194
Split PDF Options	195
Split PDF Profiles	198
Optimizing a PDF	200
Optimizer Settings	201
Optimizer Profiles	205
Creating Bookmarks	208
Deleting Bookmarks	209
Moving Bookmarks	210
Bookmarking Selected Text.....	211
Renaming Bookmarks.....	212
Setting Bookmark Destination.....	213
Editing Bookmark Actions	213
Custom Bookmark Actions.....	215
Editing Bookmark Appearance.....	217
Automatically Create Bookmarks.....	218
Creating Headers and Footers	219
Header and Footer Options	219
Header and Footer Profiles	222

Removing Headers and Footers	223
Creating a Watermark	224
Watermark options	224
Watermark Profiles	227
Removing a Watermark	227
OCR PDF	228
Batch Processing	231
Selecting Batch Files	232
Configuring Batch Output Settings	233
Setting Open Passwords on Batch	234
Batch Header and Footer	235
Batch Watermark	237
Batch Convert	239
Batch Convert to PDF/A	240
Batch Crop	242
Batch Export Forms	245
Batch Extract as Images	247
Batch Extract Text	249
Merge a Batch	250
Batch OCR	252
Batch Optimize	254
Batch Preflight	256
Batch Print	258

Batch Set Initial View	259
Batch Set Security	261
Batch Split Documents	264
Creating and Editing PDF Forms.....	267
Filling PDF Forms	267
Exporting Form Data	269
Importing Form Data	269
Resetting Form Fields	270
Flattening Form Fields.....	270
Highlighting Form Fields.....	271
Form Editing Mode.....	272
Form Field Editor Toolbar	273
Creating Form Fields	277
Form Text Box.....	278
Form Check Box	282
Form Radio Button	284
Form Combo Box	287
Form List Box	291
Form Button	294
Form Signature Field	297
Moving & Resizing Form Fields	299
Aligning Form Fields	300
Form Field Formatting.....	302

Form Field Calculations.....	304
Form Field Validation.....	306
Form Field Actions	307
Editing Field Tab Order	311
Linking Form Fields	311
PDF Form JavaScript.....	312
Digital Signatures.....	317
Creating Digital Signature Fields.....	318
Modifying Digital Signature Fields	318
Creating Self-Signed Digital IDs	319
Importing Digital IDs.....	320
Applying a Digital Signature	321
Digital Signature Options	325
Digital Signature Appearance	326
Validating Digital Signatures.....	328
Trusting Digital Signatures	329
Managing Trusted Certificates.....	330
Managing Digital IDs	332
Managing Timestamp Servers	335
Document Properties.....	337
General Document Properties	337
Document Security.....	339
Document Initial View.....	342

Document Fonts	343
Converting PDF Documents	345
Converting PDF to Fast Web View	345
Convert PDF to HTML5/SVG.....	346
Export Pages as JPEG.....	347
Export Pages as TIFF.....	349
Export Pages as PNG	351
Export Pages as GIF.....	353
Converting PDF to PDF/A-1B.....	354
Extracting Text from PDF	356
PDF Preflight	359
PDF/X-1a:2001 – ISO 15930-1 Verification.....	361
PDF/X-1a:2003 – ISO 15930-4 Verification.....	362
PDF/X-3:2002 – ISO 15930-3 Verification.....	363
PDF/X-3:2003 – ISO 15930-6 Verification.....	364
PDF/A-1B Verification.....	365
Converting PDF to PDF/A-1B.....	367
Glossary	369

Welcome to PDF Studio

PDF Studio - Affordable, Powerful PDF Software for Windows, Mac, & Linux.

PDF Studio™ is an all-in-one, easy to use PDF editor that provides all PDF features needed at a fraction of the cost of Adobe® Acrobat® and other PDF editors. PDF Studio maintains full compatibility with the PDF Standard.

PDF Studio allows you to:

- [Create PDFs](#) from scratch, [scanned documents](#), MS Word, Text, and Image files
- [Merge, Split & Assemble](#) Documents
- Annotate PDFs with [Comments and Text Markups](#)
- Fill In & Save [PDF Forms](#)
- Secure Documents with [Passwords and Permissions](#)
- Add [Bookmarks](#), [Watermarks](#), [Headers and Footers](#)
- Create and edit [Form Fields](#) **Pro**
- Add text to a document using [OCR](#) (Text Recognition) **Pro**
- [Edit PDF content](#) directly (Text, Images, Shapes) **Pro**
- Digitally [Sign PDFs](#) **Pro**
- [Redact](#) content from any document including images **Pro**
- [Batch Process](#) Multiple PDFs at once **Pro**
- Precision [Measuring Tools](#) including Distance, Perimeter and Area **Pro**
- Validate and convert PDF documents to meet [PDF/A ISO standards](#) **Pro**

PDF Studio uses Qoppa Software's proprietary technology to view and modify PDF files. It is platform independent and can run on Windows, Mac OS X, and Linux. Simply [download](#), install, and start working with PDF files immediately.

Customer Support

Users who have purchased PDF Studio receive free online and e-mail only technical support.

PDF Studio Help

Online

[PDF Studio Online Knowledge base](#)

Contains step-by-step tutorials as well as answers to most common questions on just about anything you would need for PDF Studio.

Within PDF Studio

Contact us from within PDF Studio by going to **Help > Email Support** and sending us an email or question. This is the most effective way for us to assist you as it will provide us a copy of the PDF Studio log which will help us to resolve any problems you may have.

Email

studiosupport@qoppa.com

Only e-mail Technical Support directly if you encounter problems while using PDF Studio and are unable to send us an e-mail from Within PDF Studio as listed above. When you contact us, please have a clear description of the problem, PDF Studio version, name and version of your operating system, as well as include any documents or screenshots showing the issue. To find the PDF Studio version and serial number, start PDF Studio and select About PDF Studio from the Help menu.

Release notes

For documentation updates and release notes, refer to our knowledge base here ([PDF Studio 10 change log](#))

Download User Guides as a PDF

[PDF Studio 10 User Guide \(.PDF\)](#)

[PDF Studio 9 User Guide \(.PDF\)](#)

[PDF Studio 8 User Guide \(.PDF\)](#)

What's New

New Major Features Released in Version 10

- Optimizer to Reduce PDF File Size **Pro**
- UI Redesign & Enhancement

- Touch Mode for Tablets
- Convert from PDF to HTML5 **Pro**
- New Visual Comparison Tool (Overlay) **Pro**
- New Printing and Scanning Dialogs
- Improved Recent File List
- Many Annotations, Links and Form Fields Improvements
- Enhancements in Layers and Bookmarks Handling
- And many more new features and enhancements...

[Read our Press Release](#)

PDF Optimizer **Pro**

The new Optimizer allows to change image quality (compression, color space and resolution) as well as remove unused objects.

Reduce and optimize PDF file sizes with options including:

- Read more about how to [optimize PDF documents](#) with PDF Studio
- [Create Optimizer profiles](#)
- Image Processing: Changing the compression, down sampling, or changing the color space
- Object Removal: Removing unused resources, attachments, alternate images
- Other Options: Flatten comments, compressing uncompressed streams, merging duplicate fonts and so much more!
- [Batch optimize](#) multiple files at once

UI Redesign and Enhancement

- Icon redesign to a more modern design that's easier on the eyes
- Consolidated menus for faster access to tools and options
- Added more [keyboard shortcuts](#)
- Added progress information for advanced functions
- Improved Navigation
- New view option for Rulers & Grid display with customizable options
- New view option for Reading Mode (it is not a full screen but all toolbars and panes are hidden to enhance the reading experience)
- Undo & Redo toolbar buttons can be enabled in preferences
- Save As toolbar button can be enabled in preferences



[Touch Mode for Tablets](#)

“Touch Mode” makes PDF Studio more user friendly on touch screen enabled PC and Tablet devices including Windows Surface Pro!

- Enlarged re-size handles on annotations and form fields for easier control
- New large and extra large icon sizes for easier viewing on high resolution displays
- Enlarged fonts and rows in comments and thumbnail panes.
- Touch mode button for easy switching between modes
- Mini toolbar during object selection for quick access to delete & show properties
- Viewing pane navigation buttons for previous and next page

Conversion To & From PDF **Pro**

- New [PDF to HTML5 Conversion](#) **Pro**. Look under **File > Convert to... > HTML5 / SVG**
- Improvements to our proprietary Word to PDF converter, including support for WMF images used for mathematical equations and formulas.

Overlay Comparison **Pro**

- Compare 2 drawings or documents and immediately identify the differences using color coding:
 - Elements present only in first drawing appear in red
 - Elements present only in second drawing appear in green
- Alignment tools allow moving and resizing second document dynamically for perfect match
- Easily switch back and forth between overlay comparison and side by side comparison. (Pro)
- Option to export the overlay comparison as a new PDF, with the 2 drawings included as layers.

Layers

- Assign comments to a layer through the properties dialog
- Flatten all comments belonging to a layer through the layer context menu
- Support for Show/Hide layers action in form fields, links or bookmarks
- Add new layers through the layer pane toolbar (Pro)
- Assign an active layer to add comments to through the layer context menu (Pro)
- Import PDF as a new layer or on an existing layer (Pro)
- View and edit layer properties (name, default state, show on print, locked) (Pro)
- Fix issue with layer visibility for nested layers

Printing / Scanning

- New PDF Studio Print Dialog. New options for printing: printing specific pages, reverse pages, show or hide comments, etc... This will give more possibilities for printers / drivers that don't support all features, especially on Linux.
- Support for WIA scanning on Windows

- Support for ICA scanning on the Mac
- Improved PDF creation options when scanning. Added a “Reverse Interleave” insert option useful to scan double-sided when scanner does not support duplex.
- Option to split by blank scanned pages, i.e, pages that look blank versus pages that have no content
- Linux – Fix scanning issue with certain scanner drivers reverting from the selected scanning resolution to the default resolution, set at 75DPI.

Recent File History

- Improved Recent File List will now keep 500 files in the history, with easy access to the 10 most recent files.
- Recent files are ordered by period: This Week, Last Week, 2 Weeks Ago, 3 Weeks ago, etc...
- Ability to clear recent file list history.
- New user preference allowing to restore page view and magnification when reopening a document. Look under Preferences -> Display.

Annotation Improvements

- Movable vertices for poly-line and polygon annotations
- Support for border style (dash, cloud, etc...) in all shape annotations
- Easily rotate stamps with a rotation handle
- Measurement annotations improvements: new option to display area and perimeter measurements on the page.
- Changing caps only when editing annotation note or author would not save / take effect
- Improved curve smoothing on pencil annotations: No longer cutting off edges. See also the new pencil tool property “Smooth Curves” that allows to turn curve smoothing off. Tablet users have asked us for this as the stylus already performs some smoothing...
- Added ability to create points or dots with the pencil annotation. (Previously dots were not recognized)
- Change transparency dynamically to existing and custom rubber stamps
- Change the z-order of annotations with new Send to Back/Bring to Front options
- Text annotations in Linux not displaying in Courier font.
- Edit multiple annotations at once through the properties dialog (in version 9, this was only possible through the quick property toolbar).
- New “Text Property” toolbar for interactive objects, separate from the visual property toolbar, customizable with bold and italic.
- Pasting text from Outlook, Word would sometimes create a black image stamp.



Form Field Improvements

- Date picker for date fields
- Sticky fields to add multiple fields easily

- Added sticky and default tools properties for form fields
- New option to always show properties dialog when adding a field
- Form Field Editor (Pro): Edit field names directly in the field tree
- New “reset” option in form field context menu (in form edit mode)
- Improvements to the combo field editing
- Support image scaling in button field
- Support all image types (not only JPEG) when importing images into a button field with Javascript (event.target.buttonImportIcon())
- Handle both field widget and page rotation for text orientation



Content Editing & OCR **Pro**

- Display compression & DPI under image object properties
- Display color spaces for path and image objects
- No more refresh issues where objects seemed to be disappearing when moved (due to clipping issues on specific documents)
- Font size for text content object would sometimes be incorrect under the properties dialog
- New OCR resolution option to reduce noise and improve results



Redaction **Pro**

- New option in Redaction to add text to the redaction annotation with properties for font, font size, auto resize, color, alignment, and repeat text. The text is added on top of the redacted rectangle when the redaction annotation is burnt or applied. Look under the properties dialog or under the Redaction tool properties under Preferences -> Comments.

Bookmarks

- More options when editing bookmark actions: zoom and option to set the destination visually
- Edit the style of multiple bookmarks at once.
- Set defaults for bookmarks style
- Allow selection of multiple bookmarks at different hierarchy levels
- Left, right, up, & down arrows to move bookmarks in the tree
- Cut/ paste bookmarks in the tree (in addition to existing cut and paste)

Document Split / Merge

- Split by blank scanned page – set the tolerance levels for blank pages to easily split scanned pages that may still have small marks on them.
- When 2 tagged documents are merged, the tag structures are also merged.
- New functions in the thumbnail pane when multi-selecting pages:

- When dragging thumbnail across documents, support for modifiers: Shift (or no modifier) +Drag to move pages, CTRL+Drag to copy pages
- When dragging out thumbnails, create a new file in a folder on your machine with the selected pages
- Also see new entries for “Copy to New PDF” and “Move to New PDF” under the mouse context (right-click) menu.

Other Enhancements and Fixes

- Link tool now highlights all links so they are easily identifiable and editable.
- Linux – Support for Thunderbird email application or customize to open any other email application.
- Fixed issue when reading EchoSign digital signatures when reading the signer and expiration date info.
- Linux – Added Chrome to the list of supported browsers for opening links. PDF Studio will open the first browser found on the machine, among the following: “firefox”, “opera”, “konqueror”, “epiphany”, “mozilla”, “netscape”, “google-chrome”. The issue with this approach is that it does not use the default browser but it is the most reliable approach for opening a browser across all Linux distributions.
- New function to “rasterize” a PDF, which consists in re-creating the document using images of the pages instead of vector commands. Look under Images -> Rasterize PDF. It’s a shortcut for exporting a PDF to images and then re-importing the images into a new PDF.
- Search dialog user interface was a bit improved. Also, upon opening the dialog, the search box will now default to text currently selected in the document, if any. A problem with slower speed on subsequent searches was also resolved.
- More support for undo: allow to undo adding attachments and importing annotations.
- Show if a document is tagged for accessibility under Document Properties.
- Under document properties, xmp metadata will now show in an expandable, collapsible tree.
- Removed integration with document services (Google Drive, Sharepoint). [Read why.](#)
- Ability to specify custom page size when adding a blank page
- New user setting to disable in-app messaging
- Some improvements CJK fonts support.
- Mac – ability to drag and drop supported image files and Word documents into PDF Studio app for a conversion to PDF on the fly.
- Improvement to PDF Studio log files to help with customer support.

System Requirements





Installation requirements


- 200 MB free hard disk space (OCR language packs will require additional space)
- Internet connection (for product activation, OCR languages, and product updates)
- Pointing device and keyboard

Hardware requirements

- 768 MB free RAM (system memory)
- Screen resolution of 1024 x 768 or higher is highly recommended

Operating systems

	Platform	Download	Instructions
	Windows 10, Windows 8 & 8.1, Windows 7, Vista, XP, Server, NT, etc...	Windows Download	Windows Instructions
	Mac OS X 10.10, 10.9, 10.8, 10.7	Mac OS X Download	Mac OS X Instructions
	Mac OS X 10.6*	Mac OS X Download	Mac OS X Instructions
	Linux – 32 bit	Linux 32 Download	Linux 32 Instructions

	Linux – 64 bit	Linux 64 Download	Linux 64 Instructions
	Other Unix* – AIX, Solaris Intel, Solaris Sparc, HP-UX	Unix Download	Unix Instructions

*Java Runtime Required:

The Java Runtime Environment (JRE) 1.6.x, is the minimum version required to use the full functionality of PDF Studio. However, we strongly recommend Oracle Java version 1.7.x, patch level 76, or the latest Oracle Java 7, - for Linux users - OpenJDK 6, build 27, or OpenJDK 7.

PDF Studio Installation Instructions

Windows Instructions:

- Instructions
 - After downloading, double-click PDFStudio_v10_x_x_win.exe (where x_x should be replaced with the current version number).
-

Mac OS X Instructions:

- Instructions
 - After downloading, the installer should launch automatically and create an icon on the desktop.
 - The installer is a standard PackageMaker installer packaged inside a disk image. The operating system should recognize the files and launch the installer automatically.
 - If the installer doesn't start on its own:
 - Double click on the installation file PDFStudio_v10_x_x_mac.dmg (where x_x should be replaced with the current version number) to mount the disk image, then double click on the mounted image.
-

- Finally double click on the installer PDF Studio Installer.
 - Notes
 - PDF Studio 10 works on Mac OS X 10.10 (Yosemite), Mac OS X 10.9 (Mavericks), 10.8 (Mountain Lion), 10.7 (Lion), 10.6 (Snow Leopard).
 - After installation, the installer should remove the downloaded files automatically. If this does not happen, you can manually drag the files to the trash.
-

Linux 32-bit Instructions:

- Instructions

After downloading the installer, open a Terminal window and type the following two commands:

 - `cd Downloads` to go to the directory where you downloaded the installer.
 - `sh ./PDFStudio_v10_x_x_linux.sh` where `x_x` should be replaced with the current version number. This will start the installer.
-

Linux 64-bit Instructions:

- Instructions

After downloading the installer, open a Terminal window and type the following two commands:

 - `cd Downloads` to go to the directory where you downloaded the installer.
 - `sh ./PDFStudio_v10_x_x_linux64.sh` (where `x_x` should be replaced with the current version number). This will start the installer.
-

Other Unix Instructions: AIX, Solaris, HP-UX

- Instructions
 - After downloading the installer, open a shell and, `cd` to the directory where you downloaded the installer.
 - At the prompt type: `sh ./PDFStudio_v10_x_x_unix.sh` (where `x_x` should be replaced with the current version number). This will start the installer.
-

- Notes
 - You need to install a Java 1.7 virtual machine. When available, we strongly recommend using the JVM distributed by Sun Oracle as our experience has been that other JVMs introduce a lot of issues in PDF Studio (GTK issue with toolbar spacing issues, no SWT support for native file browser, other bugs with image rendering). You can download one from [Sun's Java web site](#) or contact your OS manufacturer.

Registration / Unregistration / Transfer

Registration / Activation

When running in demo version, a watermark will be added to documents upon saving them.

To run in full production mode, PDF Studio needs to be activated with the license key that was emailed to you after your purchase.

Once you receive the license key, launch PDF Studio, and a dialog will show up where you can click on the Activate button.

If PDF Studio is already launched, the activate button is also accessible from the top menu, under **Help > License Information**.

If your computer is offline, put it online temporarily to activate the software. If the computer can not be put online, contact [PDF Studio Customer Support](#) for help.

Unregistration / Deactivation

Uninstalling PDF Studio from a computer does not automatically deactivate it.

If you are moving computers, first deactivate PDF Studio from your old computer before activating it on your new computer.


If you have reached the maximum number of activations allowed on your license, you need to first deactivate PDF Studio on a computer you no longer use before activating it on another computer.

To deactivate, go to **Help > License Information** and click on the “**Unregister**” button.

If your computer is offline, put it online temporarily to deactivate the software. If the computer can not be put online, contact [PDF Studio Customer Support](#) for help.

Getting Started with PDF Studio

To start using PDF studio, simply launch and open a PDF document using either the **File** ->

Open menu or the Open button  on the toolbar. Once a document is loaded, you can print, save, or navigate through the document at any time using the toolbar.

The Main Menu

- **File** – functions to work with PDF files, including opening, creating, saving, reverting, etc...
- **Edit** – Undo, Redo, search, tool selection, and Preferences.
- **View** – Navigation panel selection, magnification options, and navigation.
- **Document** – Manipulate pages, split, merge, rotate, add headers and footers.
- **Comments** – Add new annotations and stamps, export, import, or delete comments.
- **Forms** – Create and Edit forms, export and import form data **Pro**, and reset or flatten fields.
- **Images** – Export pages as images and import images.
- **Batch** **Pro** – Print a batch, apply actions to a batch, set security to a batch, etc...
- **Security** – View and set document security, digitally sign a PDF **Pro**
- **Window** – Cascade, tile, or minimize windows.
- **Help** – Access to documentation, send an email to support, information about PDF Studio.

The Toolbar

The [Toolbar](#) is located at the top of the PDF Studio window. The toolbar is where you will find all of the most commonly used functions in PDF Studio.

Panes

Panes are where you will find additional tools or information on the current document. These pane can be resized by clicking and dragging the edge of the pane. Pane can also be completely closed by either clicking the "x" on the top right of the pane, using the toggle buttons on the left of the PDF Studio window, or going to **View** -> **Tabs** and unchecking the pane you wish to close.

Details of each of the panels are listed below.

Left Pane

The left pane can show one of four different views. The views can be toggled by their respective buttons on the left side of the screen, or from the View menu. The following views are available:

- **Pages Pane** – view miniature versions of all the pages in the documents. Click a thumbnail to go to that page. Thumbnails can be dragged and dropped within a document to move pages, or across documents to copy pages into another document. You can also drag [supported file types](#) to the thumbnail pane to add them as PDF Pages.
- **Bookmarks Pane** – view bookmarks or the document's table of contents, if present. [Bookmarks](#) allow navigation through bookmarked regions.
- **Attachments Pane** - view files that have been attached to the PDF document, if any. Attached files can be viewed, saved, or deleted.
- **Layers Pane** – view layers contained in the document, if any. You can toggle layers by checking them on or off.
- **Signatures Pane** – view [digital signatures](#) that have been applied to the document.

Right Pane

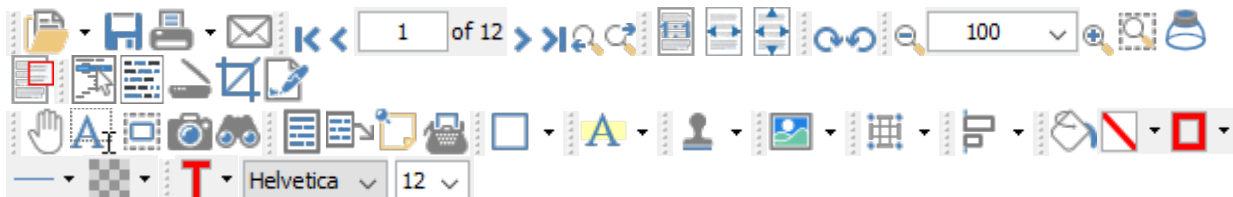
The [My Comments](#) list in the right pane shows frequently used and saved comments. Click on any of the comments to quickly reuse a previous or saved annotation with just a single click.

Bottom Pane

The [Comments](#) view in the bottom pane shows any comments / annotations in the document. Navigate to a specific comment by selecting it in the list.


PDF Studio Toolbar

The toolbar is located at the top of the PDF Studio window. The toolbar is where you will find all of the most commonly used functions in PDF Studio.



The default toolbar is setup as displayed above (in the Pro version) but can be customized using one of the methods below:

Drag and Drop

To rearrange the tools on the toolbar using drag and drop, click on the divider line  to the left of the tool group you wish to move, and then drag and drop it into new position. You can move any of the tool groups to any location on the toolbar. A third row can be created by dragging a tool group below the second row to create a third row.


You can also create a bottom toolbar by dragging the tools and dropping them on the bottom of the PDF Studio window

Toolbar Preferences

You can access the [Toolbar Preferences](#) dialog using either of the following methods:

- Right click on a blank space on the Toolbar and select “Customize Toolbar” option.
- Go to **Edit -> Preferences -> Preferences** and select Toolbars.

Floating Tools

Tools can also be floated in other locations for easier access. To float any of the tools from the toolbar click on the divider line  to the left of the tool group you wish to float and drag your toolbar out of the toolbar section and then drop it into new position not on the top or bottom toolbar to leave it floating. To return it back to the toolbar either drag it back to a location on the toolbar or click the “X” button and it will return to its last location on the toolbar.

Reset Toolbar

To reset the toolbar back to the installation defaults right click a blank space on the toolbar section and select “Reset Toolbars” option. (Note: *This cannot be undone*)

Toolbar Descriptions

File



Open: Open a PDF document or convert any of the supported file types to a PDF.




Save: Save the current document.





Print: Print the current document using either of the 2 available printer dialogs. The last used option will be the default.


- **Print with Windows/Mac/Linux:** Prints the PDF using the default system print dialog.
- **Print with PDF Studio:** Prints the PDF using the PDF Studio dialog.


 **Email PDF:** Attaches the current document to an email using the email application set within [Email Preferences](#).


Navigation


 **First Page:** Navigates to the first page of the document.


 **Previous Page:** Navigates to the previous page in the document.

 **Page Number:** Displays the current page being viewed and the total number of pages. Type a number into the field and press "Enter" to navigate directly to that page.


 **Next Page:** Navigates to the next page in the document.


 **Last Page:** Navigates to the Last page in the document.

 **Previous View:** Navigates to the last view within the document.

 **Next View:** Navigates to the next view within the document.


Page Fit


 **Actual Size:** Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling.

 **Fit to Width:** Scales the view to fit the width of the document in the PDF Studio frame.


 **Fit to Page:** Scales the view to fit the entire document within the PDF Studio frame.


View Rotation


 **Rotate View Clockwise:** Rotates only the view within the document clockwise (**Note:** *This rotation will NOT be saved when the document is saved then reopened*).


 **Rotate View Counter Clockwise:** Rotates only the view within the document counter clockwise (**Note:** *This rotation will NOT be saved when the document is saved then reopened*).


Zoom


 **Zoom Out:** Zoom out to view the content smaller.

 **Zoom To/Current Zoom:** Displays the current zoom value. You can also select a preset zoom percentage or type in the field for a custom zoom value.


 **Zoom In:** Zoom in to view the content larger.

 **Zoom Tool:** Zooms to a selected area within a page. Click and drag to select the rectangle area you wish to zoom to.


 **Loupe Tool:** Displays a zoom window that zooms in on the PDF to show the smallest detail.

 **Pan and Zoom:** A window showing the portion of the page currently on screen. Drag the red box to adjust the view of the document.


Document


 **Edit Content** Pro: Allows you to [edit content](#) within the PDF.

 **Mark for Redaction** Pro: Marks content for [redaction](#).

 **Scan to PDF:** Creates a PDF from a scanner using either of the 2 available scanning dialogs. The last used option will be the default. (**Note:** *Linux will always use Sane for scanning*)

- **Scan with Twain:** Scans using the default system print dialog.
- **Scan with WIA/ICA:** Scans using the PDF Studio dialog.

 **Crop Pages:** Allows you to [crop](#) the PDF pages(s).

 **Sign Document** Pro: Allows you to [digitally sign](#) the current PDF.

Standard



Drag and Scroll Page: Click and drag to scroll or move the pages.



Select Text: Click and drag to select text within the document.



Edit Interactive Objects: Used to edit interactive objects within the PDF which include annotations and form fields. **Pro**



Take Snapshot: Used to save a portion of the screen as an image.



Search Text: Used to search the text of a PDF document.

Text Comments



Text Box: Creates a text box annotation.



Callout: Creates a callout annotation.



Sticky Note: Creates a sticky note annotation.



Typewriter: Creates a typewriter annotation.

Shape Comments



Circle: Creates a circle annotation.



Arrow: Creates an arrow annotation.



Line: Creates a line annotation.




Square: Creates a square annotation.




Pencil: Creates a pencil annotation.





Polygon: Creates a polygon annotation.


 **Cloud:** Creates a cloud annotation.


 **Polyline:** Creates a polyline annotation.


Text Markups


 **Highlight Text:** Used to highlight text on a document.


 **Crossout Text:** Used to cross out text on a document.

 **Underline Text:** Used to underline text on a document.


 **Squiggly Underline Text:** Used to squiggly underline text on a document.

 **Insert Text:** Adds an insert text markup on the document.

 **Replace Text:** Adds a replace text markup on the selected text.

 **Area Highlight:** Highlights an area on a document. Useful when trying to highlight scanned text.

Rubber Stamps

 **Rubber Stamp:** Used to place a rubber stamp on the document. This tool has the following options:

- **Create Text Stamp:** Create a custom text stamp that will be added to the rubber stamps list.
- **Create Image Stamp:** Create a custom image stamp that will be added to the rubber stamps list.
- **Create Custom Stamp:** Create a custom stamp that will be added to the rubber stamps list.
- **Manage Stamps:** Opens the rubber stamps manager to create/edit/delete rubber stamps.

Multimedia


 **Sound:** Adds a sound annotation attachment to the document.



Image: Adds an image as a rubber stamp annotation to the document.



Link: Used to create links in a document.



Attach File: Attaches a file to the PDF without an annotation.



Attach File as Comment: Attaches a file to the annotation with an annotation.

Measurements Pro



Distance: Used to measure the distance between two points on the document.



Perimeter: Used to measure the perimeter on the document using multiple lines.



Area: Used to measure a designated area on the document.

Alignments



Align Left: Aligns the selected objects to the left.



Align Center: Aligns the selected objects to the center.



Align Right: Aligns the selected objects to the right.



Align Top: Aligns the selected objects to the top.



Align Middle: Aligns the selected objects to the middle.



Align Bottom: Aligns the selected objects to the bottom.




Distribute Horizontally: Evenly distributes the selected objects horizontally.




Distribute Vertically: Evenly distributes the selected objects vertically.




Align Width: Aligns the width of the selected objects.


 **Align Height:** Aligns the height of the selected objects.


 **Align Both:** Aligns both the width and the height of the selected objects.

Properties - Appearance


 **Fill Color:** Allows you to select the fill color of the selected objects.

 **Border Color:** Allows you to select the border color for the selected objects.


 **Line Width:** Sets the border line width for the selected objects.


 **Transparency:** Sets the transparency for the selected objects.

Properties - Text

 **Text Color:** Sets the font color for the selected annotation.

 **Font:** Sets the font for the selected annotation.

 **Size:** Sets the font size for the selected annotation.

 **Horizontal Alignment:** Sets the text alignment for the selected annotation.


 **Bold:** Makes the selected annotation text **Bold**.


 **Italic:** Makes the selected annotation text *Italic*.

Touch Mode

 **Touch Mode:** Enables/Disables Touch mode


Others

 **Divider:** separates each of the toolbar sections


 **Grouped Button/Options:** used in one of the following


- choose between different options for the tool it is attached to
- to select other tools when toolbars are grouped (see Grouped Buttons in [Toolbar Preferences](#))

Mini Toolbar

The mini toolbar  is a small toolbar that is displayed when an Annotation, Link, or Form Field is selected. This toolbar allows you to easily access the properties or delete the selected object without needing to use the right click context menu or keyboard. The toolbar can be enabled or disabled in the [Toolbar Preferences](#).

The Mini Toolbar has two buttons



 **Properties:** Opens the properties for the selected annotation, link, or form field (**Note:** *The mini toolbar will only be displayed on form fields when in Form Editing Mode*)

 **Delete:** Deletes the selected annotation, link, or form field

Quick Properties Toolbar

The quick properties toolbar allows you to edit the selected object's properties without having to access the object's properties dialog. The quick properties toolbar options will enable and disable based on the available options of the selected objects. More than one object's properties can be edited at the same time as well.

Using the Quick Properties Toolbar

1. Using the Hand Tool  or Object Selection Tool  Select the object (annotations, markups, or form fields) that you wish to edit
 - **Note:** *More than one object can be selected at a time*
2. Use the buttons on the toolbar to quickly edit any of the available properties that you wish to change
 - **Note:** *The quick properties toolbar options will enable and disable based on the available options of the selected objects.*

Quick Properties Options

Appearance



Fill Color: Allows you to select the fill color of the selected objects.



Border Color: Allows you to select the border color for the selected objects.



Line Width: Sets the border line width for the selected objects.

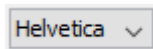


Transparency: Sets the transparency for the selected objects.

Text



Text Color: Sets the font color for the selected annotation.



Font: Sets the font for the selected annotation.



Size: Sets the font size for the selected annotation.



Horizontal Alignment: Sets the text alignment for the selected annotation.



Bold: Makes the selected annotation text **Bold**.




Italic: Makes the selected annotation text *Italic*.

Recent File History

The recent file list in PDF Studio 10 keeps track of recently opened PDF files (500 files total) in an organized and easy to use menu.

Access Recent File List

The Recent File list can be accessed by going to **File –> Open Recent...** on the menu bar or clicking on the down arrow ▼ next to the Open  icon on the toolbar.

Most Recent Files

The 10 most recent files show at the top.

Categories

Categories have been added to organize documents by:

- This Week
- Last Week
- 2 Weeks Ago
- 3 Weeks Ago
- Older

Clear Recent File List

In addition you can clear the recent file list from the recent file list menu. (**Note:** *This can not be undone*)

Keyboard Shortcuts

General Shortcuts

Action	Windows/UNIX	Mac
New Document	Ctrl + N	⌘ + N
Open	Ctrl + O	⌘ + O
Save	Ctrl + S	⌘ + S
Save as	Ctrl + Shift + S	⌘ + Shift + S
Close	Ctrl + W	⌘ + W
Revert/Reload	Ctrl + Shift + G	⌘ + Shift + G
Print	Ctrl + P	⌘ + P
Exit	Ctrl + Q	⌘ + Q
Undo	Ctrl + Z	⌘ + Z
Redo	Ctrl + Y	⌘ + Shift + Y
Show file path	n/a	⌘ or Ctrl + click window title

Document Shortcuts

Action	Windows/UNIX	Mac
--------	--------------	-----

Create bookmark	Ctrl + B	⌘ + B
Add blank page	Ctrl + Shift + B	⌘ + Shift + B
Text search	Ctrl + F	⌘ + F
Rotate pages	Ctrl + Shift + R	⌘ + Shift + R
Crop Pages	Ctrl + Shift + C	⌘ + Shift + C
Document properties	Ctrl + D	⌘ + D
Preflight	Ctrl + Shift + X	⌘ + Shift + X
Optimize	Ctrl + Shift + O	⌘ + Shift + O

Navigation/View Shortcuts

Action	Windows/UNIX	Mac
First Page	Home	Home
Last Page	End	End
Next Page	PgDn or Space	PgDn or Space
Previous Page	PgUp or Shift + Space	PgUp or Shift + Space
Go to Page	Ctrl + Shift + P	⌘ + Shift + P
Scroll Down	Space Or ↓	Space Or ↓
Scroll Up	↑	↑
Next view	Alt + →	⌘ + [
Previous view	Alt + ←	⌘ +]
Rotate clockwise	Ctrl + Shift + →	⌘ + Shift + →
Rotate counter-clockwise	Ctrl + Shift + ←	⌘ + Shift + ←
Zoom to actual size	Ctrl + 1	⌘ + 1
Zoom to fit page	Ctrl + 0	⌘ + 0
Zoom to fit width	Ctrl + 2	⌘ + 2
Zoom in	Ctrl + Plus or Ctrl + Mouse wheel up	Cmd + Plus or Cmd + Mouse wheel up
Zoom out	Ctrl + Minus or Ctrl + Mouse wheel down	Cmd + Minus or Cmd + Mouse wheel down
Cascade Windows	Ctrl + Shift + J	⌘ + Shift + J
Tile: Windows Horizontally	Ctrl + Shift + K	⌘ + Shift + K
Tile: Windows Vertically	Ctrl + Shift + L	⌘ + Shift + L
Enter/Exit Form Editor	Ctrl + Alt + M	⌘ + Alt + M
My Comments Pane	Ctrl + Shift + T	⌘ + Shift + T
Reading Mode	Ctrl + H	⌘ + H
Compare Side by Side	Ctrl + Shift + N	⌘ + Shift + N
Compare Overlay	Ctrl + Shift + U	⌘ + Shift + U

Select/Edit Tools


Tool/Action	Windows/UNIX	Mac
Hand Tool	Ctrl + R	⌘ + R
Select Text Cursor	Ctrl + T	⌘ + T
Rectangular text selection	Ctrl + drag cursor	Cmd + drag cursor
Edit Interactive Object	Ctrl + I	⌘ + I
Edit Content	Ctrl + Shift + E	⌘ + Shift + E
Redaction Tool	Ctrl + Shift + Y	⌘ + Shift + Y
Select All Text	Ctrl + A	⌘ + A
Deselect All Text	Ctrl + Shift + A	⌘ + Shift + A

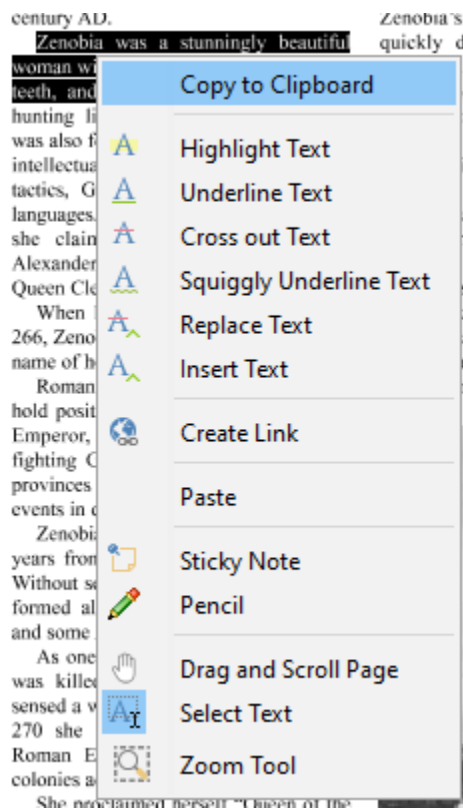
Annotation Shortcuts


Annotation	Windows/UNIX	Mac
Area	Ctrl + Alt + E	⌘ + Alt + E
Area Highlighter	Ctrl + Alt + I	⌘ + Alt + I
Arrow	Ctrl + Alt + A	⌘ + Alt + A
Attach File as Comment	Ctrl + Alt + F	⌘ + Alt + F
Callout	Ctrl + Alt + V	⌘ + Alt + V
Circle	Ctrl + Alt + C	⌘ + Alt + C
Cloud	Ctrl + Alt + B	⌘ + Alt + B
Cross out Text	Ctrl + Alt + O	⌘ + Alt + O
Distance	Ctrl + Alt + D	⌘ + Alt + D
Text Box	Ctrl + Alt + T	⌘ + Alt + T
Highlight Text	Ctrl + Alt + H	⌘ + Alt + H
Insert Image	Ctrl + Shift + I	⌘ + Shift + I
Insert Text	Ctrl + Alt + X	⌘ + Alt + X
Line	Ctrl + Alt + L	⌘ + Alt + L
Pencil	Ctrl + Alt + P	⌘ + Alt + P
Link	Ctrl + Alt + K	⌘ + Alt + K
Perimeter	Ctrl + Alt + R	⌘ + Alt + R
Polygon	Ctrl + Alt + G	⌘ + Alt + G
Polyline	Ctrl + Alt + Y	⌘ + Alt + Y
Replace Text	Ctrl + Alt + Z	⌘ + Alt + Z
Sound	Ctrl + Alt + S	⌘ + Alt + S
Square	Ctrl + Alt + Q	⌘ + Alt + Q
Squiggly Underline	Ctrl + Alt + J	⌘ + Alt + J
Sticky Note	Ctrl + Alt + N	⌘ + Alt + N

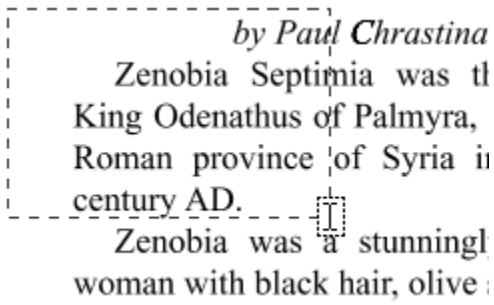
Underline Text	Ctrl + Alt + U	⌘ + Alt + U
Typewriter	Ctrl + Alt + W	⌘ + Alt + W
Flatten All Comments	Ctrl + Shift + D	⌘ + Shift + D


Selecting Text

Click on the Select text icon  on the toolbar, then drag the mouse to select the desired objects. When right-clicking on the mouse (Mac: Ctrl + Click), a menu will appear giving you the choice to copy the text to the clipboard; highlight, underline, cross out, squiggly underline, or replace the selected text; or insert new text after the selection.



For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.




To exit the selection mode, simply click on the hand tool  or Esc on the keyboard.


Selecting Objects

The object selection tool can be used to edit objects that are not a part of the actual PDF content. Below is a list of the objects that can be selected.

- Annotations
- Text Markups
- Form Fields
- Links

Using the Object Selection Tool

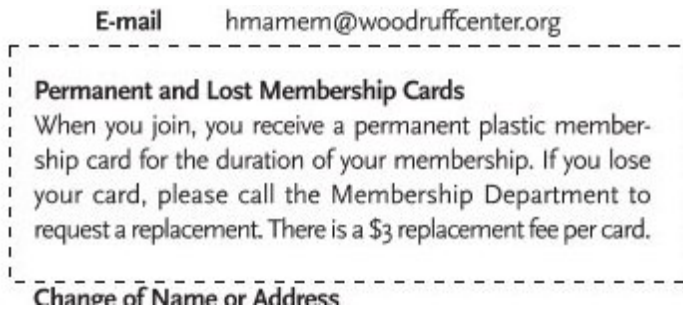
Click on the Object Selection icon  on the toolbar, then click or drag an area with the mouse to select the desired objects. Once selected objects can be edited, moved, or deleted just the same as you would anything else.

To exit the selection mode, simply click on the hand tool  or Esc on the keyboard.

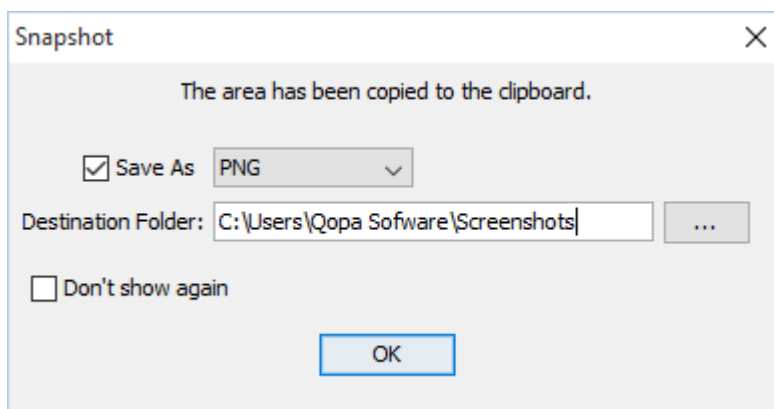
Snapshot Tool

The snapshot tool can be used to save a portion of the screen as an image.

Select the snapshot tool icon  from the toolbar then drag the mouse over the page to select the snapshot area.



When the mouse button is released, an image will be created from the selected area. The image is always copied to the system clipboard and a dialog will be displayed with additional options for the created image.




Options

- **Save As:** Allows you to save the image in the selected format to the directory specified. Once the options are selected click OK to save the file. The destination and format of the output image can also be set in [General Preferences](#) by going to **Edit -> Preferences** and selecting the General tab.
- **Don't show again:** Check this box to always use the selected options when taking a snapshot.

Text Search

With PDF Studio, you can search the text of a PDF document.

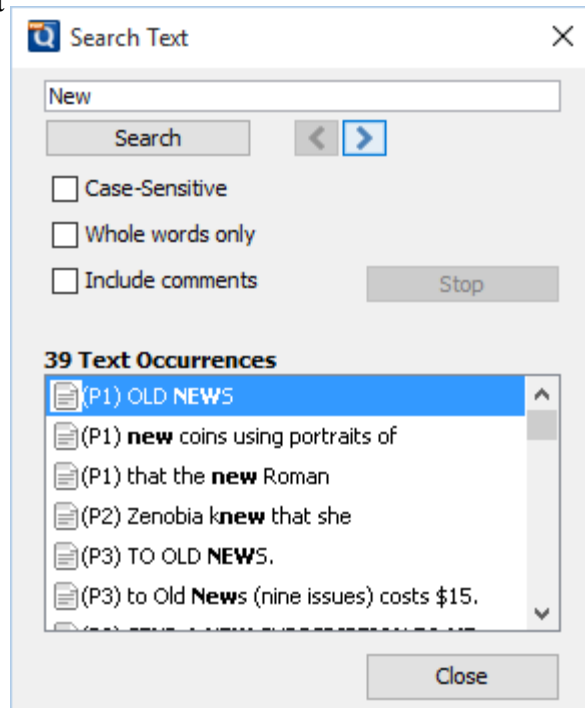
Click on the Text Search button

 on the toolbar, press Ctrl-F (Cmd + F on Mac), or choose **Edit** > **Search Text** from the menu.

Enter the text to search for in the text field, and press the Enter key or click on the Search button. All occurrences of the text in the document will appear in the occurrences list.

To navigate through the results:

- Use the Up arrow key (previous) and Down arrow key (next).
- Click on the Previous Occurrence or Next Occurrence buttons next to the New Search button with the Left and Right arrow icons.
- Use the F3 (next) and Shift F3 (previous) keys.




Searches can be customized with the following options:

- **Case-Sensitive:** If checked, searching for the string "The" will not return the same results as searching for the string "the".
- **Whole words only:** If checked, searching for "the" will not return occurrences of "they". But when this option is left unchecked, all occurrences of "they" will appear in the occurrence list.
- **Include comments:** If checked, the search will include annotation comments.

Printing PDFs

PDF documents can be printed from within PDF Studio. When printing in PDF Studio there are two available printer dialogs. To print a document using the last used print dialog just

click on the Print  button on the toolbar, press Ctrl + P (Cmd + P on Mac), or choose **File - > Print** from the menu. To switch printer dialogs click on the arrow ▼ next to the print button and select the print dialog you wish to use.

Print Dialogs

- **Print with Windows/Mac/Linux:** Prints the PDF using the default system print dialog. The settings in this dialog will be determined by the operating system.
- **Print with PDF Studio:** Prints the PDF using the PDF Studio dialog. Below is a list of the available settings when using the PDF Studio Print Dialog

Print Options

The below print options are available when using the PDF Studio Print dialog. Settings options will be enabled and disabled based on what the printer tells PDF Studio is available.

***Note:** There may be some cases where the printer may support an option that is listed as disabled because it was not reported as available to PDF Studio. If this is the case you will need to use the System Print dialog instead.*

General

Printer Name - The name of the printer you wish to print to

Page Range - The range of pages to be printed

- All Pages: all pages in the document
- Current Page: the current page being displayed
- Page Range: set the pages to be printed using the From and To options
- Even Pages Only: only print the even pages
- Odd Pages Only: only print the odd pages
- Reverse Pages: reverse the order in which the pages will come out of the printer

Copies - The number of copies of the document to be printed

- Collate: Keeps pages in order when printing multiple copies. For example, if unchecked, two copies of a three-page document will print in this order: 1,1,2,2,3,3. If checked, the order will be 1,2,3,1,2,3. This option is not available when printing only one copy.

Print Options - The printing options below will be set by default but can be customized under **Edit -> Preferences** and selecting the Print tab.

- **Center In Page:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.
- **Shrink To Margins:** shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.
- **Expand To Margins:** expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.
- **Print Comments:** print annotations when sending PDF content to the printer.

Paper

Paper Size - The size of the paper to be printed on

Paper Tray - The tray on the printer where the paper will be coming from

Orientation - The layout and direction of the content being placed on the page

- **Auto Rotate pages:** rotate the printout to match the width and length with the paper. The portrait / landscape settings cannot be set by the user when this option is selected.
- **Portrait:** print the page portrait
- **Landscape:** print the page landscape
- **Reverse Portrait:** print the page portrait but reversed
- **Reverse Landscape:** print the page landscape but reversed

Advanced

Sides - The options to print more than one page per sheet

- **One-sided:** prints only one page per sheet
- **Two-Sided (short edge):** prints two pages per sheet flipping the page on the short edge
- **Two-Sided (long edge):** prints two page per sheet flipping the page on the long edge

Chromaticity - Sets the color of the document to be printed

- **Monochrome:** will print in B&W or grayscale
- **Color:** will print the document in color

Quality - Sets the quality of the pages to be printed

- **Draft:** fast printing a low quality
- **Normal:** normal print quality at standard speed. Best for most printing situations
- **High:** high quality print for fine details. May take much longer to print

Printing a PDF With / Without Comments

When printing a document in PDF Studio it will automatically print the document with any annotations that are being displayed directly on the document. The instructions below show how to enable or disable having comments printed with the PDF document.

Changing the Comment Print Preferences

1. Open PDF Studio and click on **Edit->Preferences**
2. Select Print on the left hand side
3. Uncheck the box at the bottom in the Comments section labeled Print Comments
4. Click on OK to close the preferences window
5. Now all of your documents going forward will print without the annotations on the document.

User Preferences

The Preferences dialog allows customization of various PDF Studio settings. Below is a list of the available settings listed by the name of each section in the preferences dialog.

To open the Preferences dialog:

- Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
- | | | |
|----------------------------|--------------------------------------|--|
| • General | • JavaScript | • Text to PDF |
| • Comments | • OCR Pro | • Toolbars |
| • Display | • PDF/A Pro | • Updates |
| • Email | • Print Defaults | • Digital IDs Pro |
| • Fonts | • Rulers & Grids | • Timestamp Servers Pro |
| • Forms | • Scan | • Trusted Certificates |

General Preferences

The General Preferences section contains all of the general settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac).
2. Select **General** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Language - Select English, French, German, or Spanish. The default language will be determined from the language setting for the computer/operating system. Restart PDF Studio after changing this setting.

Author - This name will be associated with annotations added to the document.

Default Page - Sets the default page size and orientation when creating a blank PDF or adding a blank page.

- **Size:** the page size of the document using many of the global standards and also a custom option.
- **Orientation:** The orientation of the page, landscape or portrait.

Units – Define preferred measurement units (inches, centimeters, points, millimeters). Units will be used for the Crop dialog and in Document Properties when displaying the page size.

Paste Images – Sets whether or not adjust to zoom for the pasted images.

Snapshot

- **Save As:** When selected, the snapshot taken will save an image to the file system. The destination directory and format for the image will be determined from the extension selected in the textbox and the contents of the Folder text field.
- **Always Show Dialog:** choose to always show the dialog to select the image format and save location when taking a snapshot.

Other

- **Use system file dialog:** Switch between the Java file dialog and System file dialog. This selection is available to Windows and Linux/Unix installations.

- Use temporary file on save: Create a temporary file when saving documents. Some document management applications that use a WebDAV server require writing directly to the original file to preserve the document history.
- Warn before deleting pages: displays a warning before deleting pages.
- Warn before flattening all comments: displays a warning before flattening all comments.
- Warn before deleting all comments: displays a warning before deleting all comments.

Comments Preferences

The Comments Preferences section contains all of the [comment, markup, and annotation](#) settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Comments** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Tool Properties - To edit the default values for an annotation, click on the tool's name to open its properties dialog.

Measurements Pro

- Show Measuring Dialog: Display a dialog with measurement values will be displayed while measuring.
- Snap to Content: Make annotation vertices snap to lines in documents.

Text Markups

- Copy text to note: when using text markup annotations the selected text will be copied into the annotation's note.

Display Preferences

The Display Preferences section contains all of the display settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Display** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Layout and Magnification - Sets the layout and magnification defaults for displaying documents.

By default, PDF Studio uses the initial view settings set within the document to display the panels on the left when opening a document. If no setting is set within the PDF document's initial view settings, the Pages panel will be opened by default. Selecting "Ignore document setting" on any of the options will force PDF Studio to ignore the document's settings and use the selected option.

Navigation Tab - sets the default behavior for the navigation tab when opening PDF documents.

- Default: Uses the PDF Studio default settings
- None (Document Only): No navigation tab will be displayed
- Bookmarks Panel: Displays the bookmarks panel when the document is opened
- Pages Panel: Displays the pages panel when the document is opened
- Attachments Panel: Displays the attachments panel when the document is opened

Page Layout - sets the default behavior for the page layout when opening PDF documents.

- Default: Uses the PDF Studio default settings
- Single: Displays only a single individual page at a time
- Single Continuous: Displays all of the document's pages in a single column that can be continuously scrolled
- Facing: Displays only two pages at a time side by side with odd pages on the left and even pages on the right
- Facing Continuous: Displays all of the documents pages in two columns with odd pages on the left and even pages on the right
- Cover: Displays the document just as when using Facing only the first page will be displayed alone
- Cover Continuous: Displays the document just as when using Facing Continuous only the first page will be displayed alone

Magnification - sets the default magnification to use when opening PDF documents.

- Default: Uses the PDF Studio default settings
- Actual: Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling
- Fit to Page: Scales the view to fit the width of the document in the PDF Studio frame
- Fit to Width: Scales the view to fit the entire document within the PDF Studio frame
- %: Set's the zoom to the specified number value

Restore Last Page - when enabled PDF Studio reopen to the last page viewed when reopening the same PDF.

Note: The “Default” and “None (document only)” options will use the initial view settings set within the PDF. If any other option is selected it will use the PDF Studio setting instead of the setting within the PDF document’s initial view setting.

Invert Colors - Sets PDF Studio to always default to [Invert Colors mode](#).

Look and Feel - Changes the look and feel (theme) of PDF Studio. Requires a restart to be applied. Current Look and Feel options are displayed in our [knowledge base](#).

Screen Resolution - Sets the resolution to be used when displaying PDFs.

- Standard Resolution: uses the standard resolution value.
- System Setting: uses the resolution set by the system.
- Custom Resolution: allows you to set a custom resolution to be used.

Email Preferences

The Email Preferences section contains all of the email settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Email** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Enter your email account information to send PDFs from within PDF Studio.

Use Microsoft Outlook - Check to enable sending directly from Outlook (only on Windows)

Use Mac OS X Mail - Check to enable sending directly from Mail (only on Mac)

Use PDF Studio - Check this option to use the built in email function within PDF Studio. You will need to first setup your email account information in order for this to work.

Click on Edit to input your email settings.

- User Information
 - Your Name: Name to be displayed when sending the email.
 - Your Email: Email address of the account you wish to use.
- Server Information - these settings will need to be obtained from your email service provider.
 - Outgoing server
 - Server requires authentication
 - User Name
 - Password
 - Remember Password
 - Specify Port
 - Start TLS

Use the Test Connection button to make sure that your settings are correct before saving your settings.

Use other email application - Allows you to use a command line action to start an email application.

Command line email examples with a subject and an attachment

Outlook on Windows:

```
start outlook.exe /c ipm.note /m "&subject=$filename" /a "$filepath"
```

Thunderbird on Linux:


```
thunderbird -compose subject=$filename,attachment=$filepath
```

Thunderbird/Outlook on Mac:

open -a thunderbird

open -a outlook

You can also click on “Add variable” to add some pre-defined variables.

To verify your settings have worked correctly, open a document and click on the email  button or go to **File -> Email**.

Note: *At this moment, Mac users can only open the specific mail application without composing new email*

Fonts Preferences

The Fonts Preferences section contains all of the font settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Fonts** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

CJK Font Defaults

When rendering a PDF document where CJK fonts are NOT embedded, PDF Studio will try and find CJK fonts on the system and use these.

Default CJK Fonts in Windows

PDF Studio will use the following CJK fonts that ship with Windows:

Chinese Simplified: SimSun (in Simsun.ttc file)

Chinese Traditional: PMingLiu (in Mingliu.ttc file)

Japanese Serif: MS PMincho or MS Mincho (in Msmmincho.ttc)

Japanese Sans-Serif: MS PGothic (in Msgothic.ttc file)

Korean Sans-Serif: Batang (in Batang.ttc file)

Default CJK Fonts on the Mac

PDF Studio will use the following CJK fonts that ship with Mac:

Chinese Simplified: simsun, LiHeiPro, STFangSong

Chinese Traditional: pmingliu, Biaukai, LiGothicMed

Japanese Serif: ms-pmincho

Japanese Sans-Serif: HiraMaruProN-W4

Korean Sans_serif: batang or applemyeongjo or applegothic

Default CJK Fonts in Linux

Unlike Windows and Mac OSX, Linux doesn't ship with CJK fonts by default so PDF Studio can not default the CJK fonts. Users will have to set their CJK fonts under **Edit -> Preferences** then going to Fonts (see below). If no CJK fonts are available within the system font combo box, users will have to find and install new fonts on their system. It is usually possible to install new fonts in ttf or ttc format by dropping them under the /usr/share/fonts folder. Ubuntu will also let you install new fonts by opening the font in the font viewer and then clicking "Install".

Customizing Default CJK Fonts:

It is possible to change or set the default CJK fonts to use under **Edit -> Preferences** then selecting the Fonts tab. For each type of CJK font (Chinese, Simplified Chinese, Japanese, Korean, etc...), users can select what local font to use among all the fonts installed on their system.

Forms Preferences

The Forms Preferences section contains all of the form settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)

2. Select **Forms** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Flatten - These settings are used when [flattening fields](#) within a PDF.

- Paint Push Buttons: will draw the button as an image when flattening.
 - Paint Image Buttons Only: will only draw a button as an image when flattening when the button contains an image. Standard text buttons will not be drawn.
- Paint Non Printable Fields: will still flatten a field that has the visibility property set as "Hide" or "Show/Don't Print".

Field Properties - To edit the default appearance values when creating form fields, click on the field's name to open its properties dialog.

JavaScript Preferences

The JavaScript Preferences section contains all of the JavaScript settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **JavaScript** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Enable JavaScript - Enable the processing of JavaScript features in PDFs, and silence errors if desired.

- Never: will never allow JavaScript to run within the PDF document.
- Prompt: will display a message prompting the user to allow JavaScript to run in the PDF document.
- Always: Will always run JavaScript within the PDF document. **Warning:** Make sure to only open documents from trusted sources.

JavaScript can be set to Always on, Never on, or Prompt when you open a document with JavaScript in it. Prompt is the default.

Formatting Errors - Whether to Show Warning Message or Sound a Beep when there is JavaScript in the PDF Document.

OCR Preferences

The OCR Preferences section contains all of the OCR (Optical Character Recognition) settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **OCR** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

OCR Options - Options to automatically OCR when scanning and ability to download new languages and set language defaults.

- **OCR - Create Searchable PDF:** when enabled documents will be automatically OCR'd when scanning.
- **Language:** sets the default OCR language to be used.
- **Download OCR Languages:** opens the language download manager.

PDF/A Preferences

The PDF/A Preferences section contains all of the PDF/A settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **PDF/A** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

PDF/A Conversion - Settings that apply when converting a document to PDF/A-1B

- Show information dialog: whether to show a dialog explaining how the below options will be handled before starting the conversion.
 - Unsupported Annotations: whether to delete or warn when unsupported annotations are detected.
 - Transparency: whether to remove or warn when transparency is detected in images.
 - Embedded Files: whether to delete or warn when embedded files are detected.

Print Defaults Preferences

The Print Defaults Preferences section contains all of the default print settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Print Defaults** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Rotation

- Auto Rotate pages: rotate the printout to match the width and length with the paper. The portrait / landscape setting set by the user will be ignored.

Margins

- Shrink To Margins: shrink pages so that they fit in the paper. No effect if the pages in a document are smaller than the paper they are being printed on.
- Expand To Margins: expand pages to fill the paper they are being printed on. No effect if the pages in a document are larger than the paper they are being printed on.

Alignment

- **Center In Page:** center the page in the paper. No effect if the pages in a document are larger than the paper they are being printed on.

Comments

- **Print Annotations:** print annotations when sending PDF content to the printer. For text annotations such as typewriter or text boxes, the notes associated with the annotations will be visible on the document. For sticky notes or graphical annotations, it will print the icon or the circle, rectangle, etc, but not the notes associated with the annotations.

Rulers & Grids Preferences

The Rulers & Grids Preferences section contains all of the ruler and grid settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Rulers & Grids** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Units - Choose between using Inches or centimeters when the rulers and grids are enabled

Grids - Spacing and color options used for the grid options below and when displayed

- **Horizontal Spacing:** horizontal space between each of the grid lines in the units selected above.
- **Vertical Spacing:** vertical space between each of the grid lines in the units selected above.
- **Subdivisions:** number of sub divider lines between each of the horizontal and vertical lines.
- **Left Offset:** left offset distance for the initial grid line.
- **Top Offset:** right offset distance for the initial grid line.
- **Color:** color of the grid lines when enabled.

Scan Preferences

The Scan Preferences section contains all of the scanning settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Scan** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Scan to PDF - Allows you to set the default scanner to be used when scanning.

Multiple Documents - Sets the default destination to save the scanned PDF files to when creating multiple documents from a single scan.

Text to PDF Preferences

The Text to PDF Preferences section contains all of the settings for PDF Studio when converting text documents to a PDF. (**Note:** These settings will not apply when converting Word documents to PDF)

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Text to PDF** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Page Size - Page size settings when .txt files are converted.

- Width: width of the page in the units selected.
- Height: height of the page in the units selected.

Margins - Margin settings when .txt files are converted.

- Top: top margin of the page in the units selected.
- Bottom: bottom margin of the page in the units selected.
- Left: left margin of the page in the units selected.
- Right: right margin of the page in the units selected.

Units - Units to be used for the page size and margin settings when converting .txt to PDF

Font - Font settings when .txt files are converted.

- Font: font to be used when converting the .txt document.
- Size: font size to be used when converting the .txt document.
- Bold: makes all text in the converted document **bold**.
- Italic: makes all text in the converted document *Italic*.

Use Background - Set's an image that will be used as a background when converting a .txt file to PDF.

Toolbar Preferences

The Toolbar Preferences section contains all of the toolbar settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Toolbar** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

View Mode - Select which mode to change the settings for

- Standard: Settings to be used when in normal mode.
- Touch Mode: Settings to be used when in touch mode.

Customize Toolbars - In the toolbar tree, check groups on or off to show or hide that toolbar group. Each group can also be expanded to show or hide individual items within each group as well.

Group Buttons - Check groups on or off to automatically group those buttons into one button on the toolbar. When grouped the buttons will be combined into a single button with an arrow to the right of the button to select the other tools in the group.

Grouped: 

Not grouped: 

Icon Size - Change the icon size on the toolbar to either Small, Medium, Large, or XLarge,

Other

- **Show comment mini toolbar:** Enables or disables the comment mini toolbar displayed when editing annotations, links, and form fields.



Update Preferences

The Update Preferences section contains all of the update settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Update** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Updates - Check for the updated version of PDF Studio and set the automatic check interval. Options are Never, Monthly, Weekly, Daily, and On Every Start.

In-App Messaging - Enables or disables in-app messaging from Qoppa announcing new product releases.

Digital IDs Preferences

The Digital IDs Preferences section contains all of the digital ID settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Digital IDs** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

My Digital IDs - Allows you to [Manage Digital IDs](#) used when signing documents.

Password - A digital ID may be protected with a complex password. PDF Studio can save this password and protect it with your own password. When signing documents, PDF Studio will prompt you for your own password. This makes it easier to sign documents without having to remember the complex passwords.

Additional IDs - Displays a list of additional digital IDs currently installed on the system and whether or not to allow signing documents with system digital IDs.

Timestamp Servers Preferences

The Timestamp Server Preferences section contains all of the timestamp server settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Timestamp Servers** from the panel on the left of the preferences dialog to view or modify these preferences.

Settings

Timestamp Servers - Allows you to add, edit, and remove time stamp servers as well as set the default timestamp server to be used with Digital IDs.

Trusted Certificates Preferences

The Trusted Certificates Preferences section contains all of the trusted certificate settings for PDF Studio.

To open the General Preferences dialog:

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Trusted Certificates** from the panel on the left of the preferences dialog to view or modify these preferences.


Settings

My Trusted Certificate - Allows you to import and manage trusted certificates to be used when validating digital signatures.

Additional Certificates - Allows you to enable and disable additional certificates from other sources to be used when validating digital signatures.

- Trust PDF Studio Root Certificate Authorities: Enable using the certificate authorities that come packaged within PDF Studio.
- Trust System Root Certificate Authorities: Enable using the certificate authorities that are currently installed on your system.

Touch Mode

Touch mode can be enabled on your device by clicking on the Touch Mode icon  on the toolbar or going to **View** on the menu bar then selecting Touch Mode.

***Note:** If PDF Studio does not recognize a touch screen you can enable the toolbar button by going to **Edit -> Preferences** and going to the Toolbars tab and checking the box next to Touch Mode in the list to turn on the button.*

Features added specifically for Touch Mode in PDF Studio.

- Enlarged re-size handles on annotations and form fields for easier control
- Enlarged fonts and rows in comments and thumbnail panes.
- Mini toolbar during object selection for quick access to delete & show properties

Undo

In PDF Studio, it is possible to undo most actions.

Undo or redo by selecting **Edit -> Undo** or **Edit -> Redo**, or by using the standard shortcut keys:

Undo: CTRL + Z; Cmd + Z on Mac OSX

Redo: CTRL + Y; Shift + Cmd + Z on Mac OSX

Actions that can be undone / redone:

Annotations

(Textbox, callout, sticky note, typewriter, 8 shapes, sound, image, link, area highlight, measurements, stamp)

- Add
 - New
 - Paste
 - My Comments
 - Recent Comments
- Move
 - Mouse
- Keyboard
- Resize
- Change properties
- Flatten
- Delete
- Mark with Checkmark
- Review

Bookmarks

- Add
- Rename
- Delete
- Reorder

Content editing – text, path objects, image

- Redact (before being applied)
- Delete
- Move
- Edit text properties (text data, font, outline color, size, etc..).
- Edit path object properties
- Resize path and image

Form

- Edit field contents

Markup (highlight, crossout, underline, squiggly, replace, insert)

- Add
- Move
- Change properties
- Flatten
- Delete

Pages

- Rotate
- Crop
- Header/Footer/Watermark

Actions that reset the undo / redo stacks:

Document

- Save
- Security
 - Sign Field
 - Sign
 - Remove Signatures

Page

- Move
- Delete

Form

- Flatten form fields
- Reset form fields

Actions that are being ignored:


Document

- Attach file
- Add a blank page
- Insert pages

Import Annotations

Creating PDFs

There are many ways to create a PDF file in PDF Studio. Under the File menu, if you choose Create PDF, you will find the following options:

- [Creating a Blank PDF](#) – Creates a new PDF Document with no content.
- [Converting Files to PDF](#) – Opens a file dialog. Supported non-PDF files be converted to PDF and then opened.
- [Converting Multiple Files to PDF](#)  – Opens the Create from Multiple Files dialog, which merges multiple documents in a single action. Supported non-PDF files be converted to PDF.
- [Scanning Documents to PDF](#) – Opens the Scan To PDF dialog.

Creating a Blank PDF

A blank PDF can be created in PDF Studio. To create a blank PDF, with no document currently open, do one of the following:

- Go to **File -> New Document** or use the shortcut key Ctrl + N (Command + N on Mac) to create a blank document using the default settings set within the [General Preferences](#).
- Go to **Document -> Add Blank Page** or use the shortcut key Ctrl + Shift + B (Command + Shift + B on Mac) to create a blank page using custom settings.

The newly created blank page will contain absolutely no content at all.

Converting Files to PDF


PDF Studio can convert non-PDF file types into PDF Documents. See [Supported File Types](#) for a list of the supported file types.

- [Converting Word to PDF](#) - Converts word files to PDF.
- [Converting Images to PDF](#) - Converts image files to PDF.
- [Converting Text to PDF](#) - Converts text files to PDF.

Converting Word to PDF

PDF Studio can convert Word documents to PDF, both with a .doc extension (Word 97 to 2003) and with .docx extension (Word 2007 and later) to PDF.


Instructions:

1. Choose **File > Open** or click on the Open button  on the toolbar.
2. Change the files filter to Word Files (*.doc, *.docx)
3. Open the Word file you wish to convert
4. Upon opening the file, PDF Studio will automatically convert the document to a PDF document that you can then save as new PDF document.

Converting Images to PDF

PDF Studio can convert Images to PDF. The following image types can be converted *.png, *.jpg, *.jpeg, *.jpe, *.gif, *.tif & *.tiff.


Instructions:

1. Choose **File > Open** or click on the Open button  on the toolbar.
2. Change the files filter to the image format you wish to convert (PNG, JPEG, GIF, or TIFF)
3. Open the Image file you wish to convert
4. Upon opening the file, PDF Studio will automatically convert the Image to a PDF document that you can then save as new PDF document.

Converting Text to PDF

PDF Studio can convert text documents with a .txt extension to PDF. When converting .txt files the [Text to PDF](#) settings in preferences will be used to format the document.

Instructions:

1. Choose **File > Open** or click on the Open button  on the toolbar.
2. Change the files filter to Text Files (*.txt)

3. Open the text file you wish to convert
4. Upon opening the file, PDF Studio will automatically convert the Text file to a PDF document that you can then save as new PDF document.

Merging/Converting Multiple Files to PDF

PDF Studio is able to merge/convert multiple files at once to create a single PDF. Only the [Supported File Types](#) are able to be merged/converted into a single PDF.

Instructions:

1. Go to one of the following
 - **File -> Create PDF -> From Multiple Files**
 - **File -> Combine Files**
2. Using Add Files or Add Folder select the files you wish to merge/convert into a single PDF.
3. Select any additional options when converting the files.
 - Add bookmarks for each merged document.
 - Results: Open or save new merged document
 - Passwords to try when opening documents
4. Once all of the options are selected click Start to begin merging/converting the files.
5. All files will be merged/converted in a single action. All [Supported File Types](#) will be converted to PDF.

Batch Merge/Convert Settings

Bookmarks

Add a bookmark for each merged document - This will create a separate bookmark for each merged file added to the document

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

- ⬆ - Moves the selected file(s) up the list.
- ⬇ - Moves the selected file(s) down the list.
- ⬆⬆ - Moves the selected file(s) to the top of the list.
- ⬇⬇ - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Results

Open New Merged Document - After the merge is complete the new file will be displayed in PDF Studio

Save As - This option allows you to set a destination for the newly created merged file. You can type the destination manually or click on the "..." button to open a file chooser to set the destination for the newly created file

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process. Only PDF files with passwords are supported.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Drag and Drop to Create PDF

Files can be dragged and dropped onto PDF Studio.



- Supported file types can be created into a new document by dragging the file onto a PDF Studio window with no document currently open.
- Supported file types can be inserted as new pages into an existing open document by dragging the file to the Thumbnail Pane.
- Pages can also be dragged and dropped across multiple open documents.


NOTE: *Dropping a file onto the main document pane will open the document in a new frame.*

Scanning Documents to PDF

With PDF Studio, you can scan images into an existing or new PDF document using any TWAIN, WIA/ICA, or Sane compliant scanner. The scanning options available will depend on the operating system and what version of PDF Studio (32-bit or 64-bit) is being used.

To create a PDF from a scanner go to **Document -> Create PDF ->From Scanner**, or

Document > Scan To PDF, or click on the scanning button  on the toolbar. If you have multiple scanning options available you will see a small down arrow to the right of the scanning button . Click on this down arrow to select which scanning option you would like to use.

Note: *PDF Studio will always remember the last used option when clicking directly on the scanning button  instead of the arrow on the toolbar.*

Below is a list of available options when scanning to PDF for each operating system and PDF Studio version.

Windows

PDF Studio 32-bit

- [WIA Scanning](#) - Scan using the WIA scanner drivers
- [Twain Scanning](#) - Scan using the Twain scanner drivers

PDF Studio 64-bit

- [WIA Scanning](#) - Scan using the WIA scanner drivers

Mac

PDF Studio 32-bit -(Mac OS X 10.6)s

- [ICA Scanning](#) - Scan using the ICA scanner drivers
- [Twain Scanning](#) - Scan using the Twain scanner drivers

PDF Studio 64-bit - (Mac OS X 10.10, 10.9, 10.8, 10.7)

- [ICA Scanning](#) - Scan using the ICA scanner drivers

Linux


PDF Studio 32-bit & 64-bit

- [Sane Scanning](#) - Scan using the Sane scanner drivers

WIA/ICA Scanning

WIA (Windows) and ICA (Mac) are application interfaces included by the operating system that enables software to communicate with imaging hardware such as scanners and digital cameras. When scanning using either WIA or ICA PDF Studio will use our custom scanning dialog that will directly communicate with your scanners that support the WIA/ICA interface.

Scanning with WIA/ICA

1. Go to **Document -> Create PDF -> From Scanner -> WIA (ICA on Mac)**, or **Document > Scan To PDF -> WIA (ICA on Mac)**, or click on the small down arrow to the right of the scanning button  and select "Scan to PDF (WIA)" (ICA on Mac).
2. This will open the Scan to PDF options dialog
3. Select the scanner and the setting you wish to use.
4. Once you have selected all of your options click on either Preview or Scan
 - Preview - generates a quick preview using the scanning options that will be displayed on the right of the dialog
 - Scan - will use the selected options to scan and then create a new PDF or append the image to an existing PDF depending on the option selected.

WIA/ICA Scan Settings

Scan Options

Scanner - The scanner to be used

Set Default Scanner - When checked this will make the selected scanner the default going forward

Source - What scanning input to use when scanning the document/image (i.e. flat bed or feeder)

Duplex - If the scanner supports 2 sided scanning, select this option to scan both sides at the same time.

Color Format - Choose between Black and White, Greyscale, or Color when scanning

Page Size - Size of the document being scanned

DPI Resolution - What resolution to use when saving the image into the PDF document. Select a predefined value between 50 - 600 or type in your own custom value up to 1200. When selecting a DPI it's best to follow the below guidelines

Black-and-white documents

- Lowest acceptable resolution = 200 DPI (equal to “high” fax quality)
- Conventional resolution = 300 DPI
- Highest conventional resolution = 600 DPI

Color documents (and color compression)

- Lowest acceptable resolution = 150 DPI
- Conventional resolution = 200 DPI
- Highest conventional resolution = 300 DPI
- Archive resolution = 600 DPI

Brightness - Adjusts the brightness of the scanned document. Increase the value to make the document/image look lighter

Contrast - Adjusts the contrast of the scanned document. This affects the differences between light and dark on the document/image

PDF Options

Insert At - Where to insert the new image. Choose from End of Document, after the Current Page, Beginning of Document, in a New Document, or Interleave.

- Interleave – When scanning multiple images, this option can be used to insert them at every other page. This is especially useful for scanning two-sided documents.
- Multiple documents - Use this option to create multiple documents when scanning multiple pages. When selected a dialog will be displayed to set the following options.
 - Pages per PDF - Number of pages before creating the next PDF
 - File Name Patter - The file name to be used when creating the PDFs. Each file will have the number of the document appended to the end of the file name
 - Save files To - Where to save the created files
 - Save as Default - When checked this will make the selected options the default going forward

Page Size - What size to use when creating a new page to hold the image.

- Size to Image – The new page will be created the same size as the scanned image.
- Same as Document – The new page will be created the same size as the current document. If the document is empty or if the Insert At choice is set to New Document the new page will be created at the same size as the scanned image.

Compression - What compression to use when saving the image into the PDF document.

- JPEG - Lossy compression (recommended compression)
 - Quality (for JPEG compression only) – If using JPEG, the compression quality can be adjusted from 1 to 100%.
 - 1 = high compression, very low quality
 - 100 = low compression, very high quality
 - Generally, 80=high quality, 50=medium quality, 20=low quality
- Flate - Lossless compression format
- JBIG2 B&W - Lossless compression format that only supports B&W color

OCR Options


OCR - Create Searchable PDF - Check this to automatically OCR the document after scanning

Language - Language to be used if OCR is selected. Click on "Download OCR Languages" to download additional languages.

TWAIN Scanning

TWAIN (Windows and Mac) is a scanning protocol that connects scanners and applications together by providing standard interface. TWAIN allows applications to acquire images from TWAIN compliant devices (scanners, digital cameras, etc.). Most scanners come with TWAIN drivers that are installed automatically when you install the scanner in your computer. Please refer to your scanner documentation if there are no TWAIN sources available. When scanning using TWAIN PDF Studio will first launch the scanning application provided by the hardware, then once the scanning is complete import the scanned image to complete the Scan to PDF process.

Note: *The TWAIN protocol is only supported in 32-bit installations of PDF Studio on Windows and Mac. If you are using the 64-bit PDF Studio installation this option will not be available.*

1. Go to **Document -> Create PDF -> From Scanner -> Twain**, or **Document > Scan To PDF -> Twain**, or click on the small down arrow to the right of the scanning button  and select "Scan to PDF (Twain)".
2. Choose a scanner from the list and click on the OK button to proceed. If there is an error with the selected scanner, the dialog will appear again with the previously tried scanner highlighted so you can choose a new scanner.
 - If the selected scanner had been a default option, you can use this dialog to change the default scanner by selecting the new scanner and checking the "Set default Scanner" option.
3. When the OK button is pressed, your scanner's custom scanning application will open. This is a separate program that will allow you to preview the scan, choose a region to scan, adjust the scan resolution, and then accept the scan.
4. Once the scan has been accepted and PDF Studio has received the data from the scanner software, PDF Studio will display a dialog box showing some information about the scan and will prompt you for a number of choices to determine how to insert the new image.
5. Once you've selected the options click OK to then create a new PDF or append the image to an existing PDF depending on the option selected.

TWAIN Scan Import Settings

Image Info

This sections displays some basic details on the image that was received from your scanners software

PDF Options

Insert At - Where to insert the new image. Choose from End of Document, after the Current Page, Beginning of Document, in a New Document, or Interleave.

- Interleave – When scanning multiple images, this option can be used to insert them at every other page. This is especially useful for scanning two-sided documents.
- Multiple documents - Use this option to create multiple documents when scanning multiple pages. When selected a dialog will be displayed to set the following options.
 - Pages per PDF - Number of pages before creating the next PDF
 - File Name Patter - The file name to be used when creating the PDFs. Each file will have the number of the document appended to the end of the file name
 - Save files To - Where to save the created files
 - Save as Default - When checked this will make the selected options the default going forward

Page Size - What size to use when creating a new page to hold the image.

- Size to Image – The new page will be created the same size as the scanned image.
- Same as Document – The new page will be created the same size as the current document. If the document is empty or if the Insert At choice is set to New Document the new page will be created at the same size as the scanned image.

Compression - What compression to use when saving the image into the PDF document.

- JPEG - Lossy compression (recommended compression)
 - Quality (for JPEG compression only) – If using JPEG, the compression quality can be adjusted from 1 to 100%.
 - 1 = high compression, very low quality
 - 100 = low compression, very high quality
 - Generally, 80=high quality, 50=medium quality, 20=low quality
- Flate - Lossless compression format
- JBIG2 B&W - Lossless compression format that only supports B&W color

OCR Options


OCR - Create Searchable PDF - Check this to automatically OCR the document after scanning

Language - Language to be used if OCR is selected. Click on "Download OCR Languages" to download additional languages.

Sane Scanning

Sane (Linux Only) is a scanning protocol that connects to scanners by providing a standardized interface. SANE only provides an interface with the hardware and displays the options available for each scanner. When scanning using Sane PDF Studio will first launch the scanning application, then once the scanning is complete import the scanned image to complete the Scan to PDF process.

Note: For PDF Studio to connect to the scanner properly, you need to make sure that you have a **saned daemon** and at least one sane back-end installed. This is **required** for our scanning library to work properly. Note that this is not requirement for other products such as XSane and Gimp, so **it is possible that XSane and Gimp work but PDF Studio doesn't**. For more information on how to setup the saned daemon see [Scanning to PDF with Linux](#) on our knowledgebase.

1. Go to **Document -> Create PDF ->From Scanner**, or **Document > Scan To PDF**, or click on the scanning button  on the toolbar.

2. Choose a scanner from the list and click on the OK button to proceed. If there is an error with the selected scanner, the dialog will appear again with the previously tried scanner highlighted so you can choose a new scanner.
 - If the selected scanner had been a default option, you can use this dialog to change the default scanner by selecting the new scanner and checking the "Set default Scanner" option.
3. When the OK button is pressed, a standard scanning interface will be displayed. This is a separate program that will allow you to adjust the scan settings and then begin the scanning process.
4. Once the scan has been completed and PDF Studio has received the data from the scanner, PDF Studio will display a dialog box showing some information about the scan and will prompt you for a number of choices to determine how to insert the new image.
5. Once you've selected the options click OK to then create a new PDF or append the image to an existing PDF depending on the option selected.

Sane Scan Import Settings

Image Info

This sections displays some basic details on the image that was received from your scanners software

PDF Options

Insert At - Where to insert the new image. Choose from End of Document, after the Current Page, Beginning of Document, in a New Document, or Interleave.

- Interleave – When scanning multiple images, this option can be used to insert them at every other page. This is especially useful for scanning two-sided documents.
- Multiple documents - Use this option to create multiple documents when scanning multiple pages. When selected a dialog will be displayed to set the following options.
 - Pages per PDF - Number of pages before creating the next PDF
 - File Name Patter - The file name to be used when creating the PDFs. Each file will have the number of the document appended to the end of the file name
 - Save files To - Where to save the created files
 - Save as Default - When checked this will make the selected options the default going forward

Page Size - What size to use when creating a new page to hold the image.

- Size to Image – The new page will be created the same size as the scanned image.
- Same as Document – The new page will be created the same size as the current document. If the document is empty or if the Insert At choice is set to New Document the new page will be created at the same size as the scanned image.

Compression - What compression to use when saving the image into the PDF document.

- JPEG - Lossy compression (recommended compression)
 - Quality (for JPEG compression only) – If using JPEG, the compression quality can be adjusted from 1 to 100%.
 - 1 = high compression, very low quality
 - 100 = low compression, very high quality
 - Generally, 80=high quality, 50=medium quality, 20=low quality
- Flate - Lossless compression format
- JBIG2 B&W - Lossless compression format that only supports B&W color

OCR Options

OCR - Create Searchable PDF - Check this to automatically OCR the document after scanning

Language - Language to be used if OCR is selected. Click on "Download OCR Languages" to download additional languages.

Supported File Types

PDF Studio supports converting certain non-PDF file types into PDF Documents. The current supported types are:

- Image Files: *.png, *.jpg, *.jpeg, *.jpe, *.gif, *.tif & *.tiff. (Image To PDF settings are in the [Preferences Dialog](#))
- Word Files: .doc and .docx
- Text Files: .txt (Text To PDF settings are in the [Preferences Dialog](#))

Viewing and Comparing PDFs

PDF Studio provides extensive functionality for viewing and comparing PDFs

Viewing PDFs

[Navigating](#): General navigation tips and tools

[Zooming](#): Zooming in/out of the document

[Setting Page Layout](#): Setting how the pages are displayed

[Rotating Page View](#): Rotating the view of the page

[Loupe Tool](#): Magnify a small region of the page

[Pan and Zoom Tool](#): Display a window with the current location on the document

[Reading Mode](#): Full screen viewing for easy reading

[Invert Colors Mode](#): Inver colors for accessibility

Comparing PDFs

[Side by Side Comparison](#) **Pro**: Compare two different PDFs next to each other

[Overlay Comparison](#) **Pro**: Compare two different PDFs on top of each other highlighting the differences

Navigating

PDF Studio has a variety of methods that can be used to navigate PDF documents.

Using the Mouse

The primary method for navigating within PDF documents is with the mouse. PDF Studio is compatible with all standard mice and supports the following actions using the 2 buttons and scroll wheel typically found on the mouse.

Note: On Mac if using a mouse with a single button you can right click by holding *Ctrl* and clicking the mouse button

Left Mouse Button

- Click to select items
- Hold down to drag items


Scroll Wheel

- Scroll the pages in the document

Right Mouse Button

- Displays context menus with additional options

Panning/Moving Pages

With the hand tool  selected click and drag anywhere on the page to pan the document

Using the scroll wheel on the mouse you can move the document up and down

You can also use the vertical and horizontal scrollbars to pan the document by clicking and dragging on the scrollbar


Using the Keyboard


The keyboard can also be used in some cases to quickly navigate the document using shortcut keys. The following shortcuts can be used.

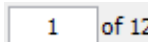
Action	Windows/UNIX	Mac
First Page	Home	Home
Last Page	End	End
Next Page	PgDn or Space	PgDn or Space
Previous Page	PgUp or Shift + Space	PgUp or Shift + Space
Go to Page	Ctrl + Shift + P	⌘ + Shift + P
Scroll Down	Space or ↓	Space or ↓
Scroll Up	↑	↑
Next view	Alt + →	⌘ + [
Previous view	Alt + ←	⌘ +]


Using the Navigation Tools


The navigation tools are located on the main toolbar and can be used to navigate the document.


 **First Page:** Navigates to the first page of the document.


 **Previous Page:** Navigates to the previous page in the document.

 **Page Number:** Displays the current page being viewed and the total number of pages. Type a number into the field and press "Enter" to navigate directly to that page.

 **Next Page:** Navigates to the next page in the document.

 **Last Page:** Navigates to the Last page in the document.

 **Previous View:** Navigates to the last view within the document.

 **Next View:** Navigates to the next view within the document.

Using Page Thumbnails

The page thumbnails can be found on the left side of the PDF Studio window. If not displayed the pane can be opened using the Pages button on the left side of the screen, or from the View menu.

The page thumbnails show miniature versions of all the pages in the documents. Click a thumbnail to go directly to that page.

Using Bookmarks

The bookmarks pane is located on the left of the PDF Studio window. If not displayed the pane can be opened using the Bookmarks button on the left side of the screen, or from the View menu.

Using bookmarks can be useful when navigating large PDFs that contain many pages. Often bookmarks are put in place to label chapters or sections within a document. Click on the bookmark to jump directly to that location in the document.

Zooming

When viewing a document there are several ways to zoom in/out of the document.

Using the Mouse

To zoom in or out on the document using the mouse hold down Ctrl (Cmd on Mac) and scroll the mouse wheel up to zoom in and down to zoom out.


Using the Keyboard


The keyboard can also be used in some cases to quickly zoom on the document using shortcut keys. The following shortcuts can be used.


Zoom to actual size	Ctrl + 1	⌘ + 1
Zoom to fit page	Ctrl + 0	⌘ + 0
Zoom to fit width	Ctrl + 2	⌘ + 2
Zoom in	Ctrl + Plus	Cmd + Plus
Zoom out	Ctrl + Minus	Cmd + Minus


Using the Zoom Tools


The zoom tools are located on the main toolbar and can be used to zoom on the document.


 **Zoom Out:** Zoom out to view the content smaller.

 **Zoom To/Current Zoom:** Displays the current zoom value. You can also select a preset zoom percentage or type in the field for a custom zoom value.

 **Zoom In:** Zoom in to view the content larger.

 **Zoom Tool:** Zooms to a selected area within a page. Click and drag to select the rectangle area you wish to zoom to.

 **Loupe Tool:** Displays a zoom window that zooms in on the PDF to show the smallest detail.


 **Pan and Zoom:** A window showing the portion of the page currently on screen. Drag the red box to adjust the view of the document.


Setting Page Layout


When viewing a document there are several page layout options available to choose from.


Page Layouts


By default the page layout will be determined by the [Initial View Settings](#) in the document or the default [Page Layout Settings](#) set in PDF Studio preferences. A different page layout can be selected when viewing the document by going to **View -> Page Layout** on the menu bar and selecting the layout you wish to use.


 **Single:** Displays only a single individual page at a time

 **Single Continuous:** Displays all of the document's pages in a single column that can be continuously scrolled

 **Facing:** Displays only two pages at a time side by side with odd pages on the left and even pages on the right


 **Facing Continuous:** Displays all of the documents pages in two columns with odd pages on the left and even pages on the right


 **Cover:** Displays the document just as when using Facing only the first page will be displayed alone

 **Cover Continuous:** Displays the document just as when using Facing Continuous only the first page will be displayed alone

Page Views

By default the page view will be determined by the [Initial View Settings](#) in the document or the default [Magnification Settings](#) set in PDF Studio preferences. A different page view can be selected when viewing the document by going to **View -> Zoom** on the menu bar and selecting the view you wish to use or clicking on the button located on the toolbar.


 **Actual Size:** Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling.

 **Fit to Width:** Scales the view to fit the width of the document in the PDF Studio frame.



Fit to Page: Scales the view to fit the entire document within the PDF Studio frame.

Rotating Page View

The pages of a document can be rotated temporarily, as if you were rotating a book or magazine in your hands. This can be accessed by clicking on the Rotate View  icons on the toolbar, or in **View > Rotate [Counter-]Clockwise**.

Note: *This rotation will NOT be saved when the document is saved then reopened. To permanently rotate pages in the document when saved see [Rotating Pages](#)*



Rotate View Clockwise: Rotates only the view within the document clockwise




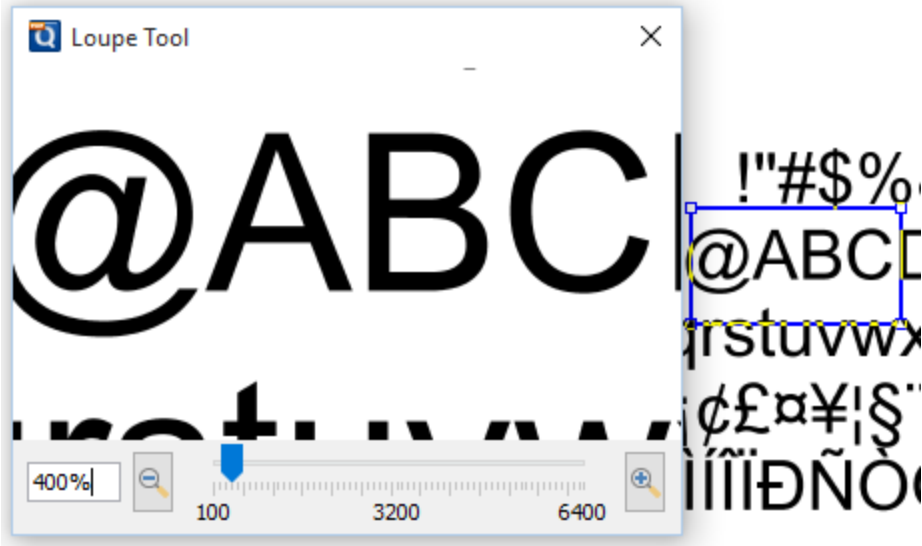
Rotate View Counter Clockwise: Rotates only the view within the document counter clockwise

Loupe Tool

The loupe tool is a draggable rectangle that zooms in on the PDF to show the smallest detail. When active a second window will be displayed showing the current content that you are magnifying.

Instructions:


1. Click on the loupe tool  button on the toolbar
2. Click on the part of the page you would like to magnify. This will display the magnification window.
3. Use either the handles on the corners of the blue zoom area or the slider in the magnification window to change the level of magnification when using the tool
4. When finished to close the tool either click on the "x" on the magnification window or press Esc on the keyboard





Pan and Zoom Tool

The Pan and Zoom tool is a second window will be displayed showing the portion of the page currently on screen. Drag the red box to adjust the view of the document.

Instructions:

1. Click on the pan and zoom tool  button on the toolbar. A second window will then be displayed showing a portion of the page currently on the screen.
2. To adjust the view of the document drag the red box or use the navigation and zoom tools in the pan and zoom window
3. When finished to close the tool either click on the "x" on the magnification window or press Esc on the keyboard

When reading a document you can hide all of the toolbars and panes to enhance the reading experience. To enable reading mode go to **View -> Reading Mode** or use the shortcut key Ctrl H (Cmd + Shift + H on the Mac)

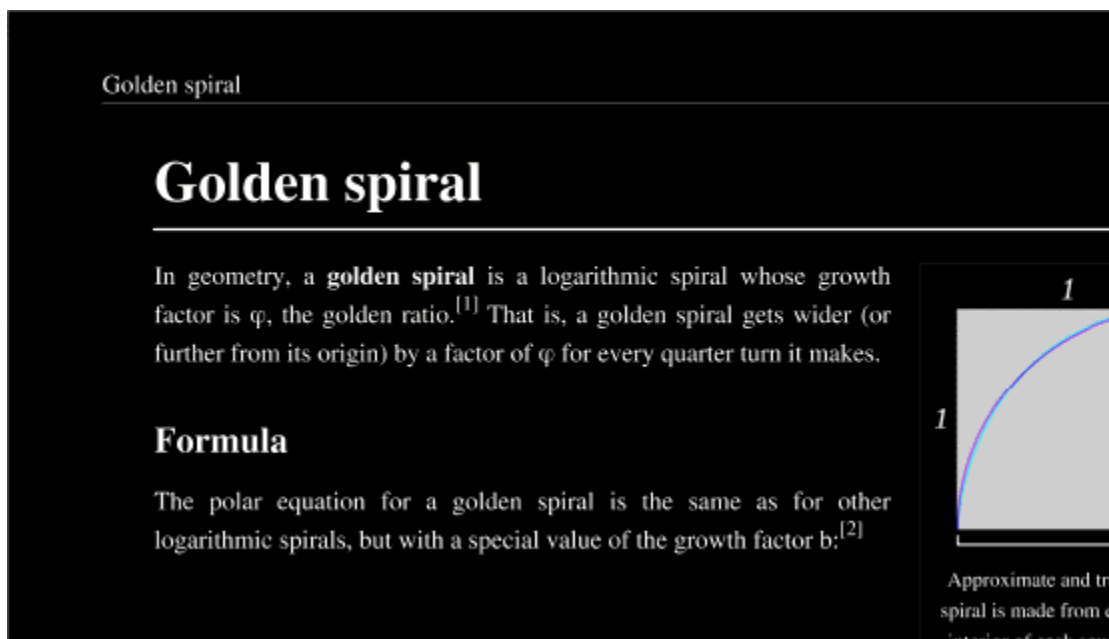
Once reading mode is enable [Navigating](#) the document using the keyboard or mouse works as it normally would. In addition you can use the left  and right  arrows that are displayed in reading mode to navigate to the next and previous pages.

Invert Colors

Invert colors when rendering a PDF document by selecting **View > Invert Colors** from the menu.

For typical documents, the display will change from "Black on White" to "White on Black". Inverting colors make things much easier to read on small screens, particularly when working in a dark room, on an airplane, or at night. This mode is available as a preference to invert colors on all documents or on any currently open document from the View menu.

Example Document with Invert Colors Enabled:



PDF Layers

PDF Layers

PDF layers allow documents to have content placed either above or below other content within the document. Individual layers within a PDF can be displayed or hidden by the user if needed. Each layer can also have its own set of comments associated with them that can be assigned to another layer or even flattened to the current layer. PDF Studio supports the following layer functions:

Note: *In order to work with Layers you will first need to display the Layers Pane.*

[Show/Hide Layers](#): How to show or hide selected layers

[Adding a Blank Layer](#): Adding a new blank layer to a PDF

[Importing PDF as Layer](#): Import a PDF as a new layer

[Assigning Comments to Layer](#): How to designate the layer comments will be added to and move existing comments to a new layer

[Flattening Comments to Layer](#): How to flatten comments on a specific layer

[Layer Properties](#): Layer properties and settings available

Displaying the Layers Pane

The layers pane is located on the left of the PDF Studio window. If not displayed the pane can be opened using the Layers button on the left side of the screen. If the document does not contain any layers, you will need to open the layers pane by going to **View -> Tabs -> Layers** on the menu.

Show/Hide Layers

When viewing a document layers can be toggled on and off to create different views.

How to Show/Hide Layers in a PDF

1. Access the layers pane by clicking the Layers button on the left side of the screen.
 - **Note:** *If the layers button is not displayed this means that the document does not contain any layers. See [Adding a Blank Layer](#) or [Importing PDF as Layer](#) if you wish to create a layer.*
2. Show or hide layers by clicking the check box next to the layers name
3. Continue working on the document as you normally would

Note: *Toggling the layers on and off does not modify the document and will not be saved. To change the default state when opening the PDF see [Layer Properties](#)*

Adding a Blank Layer

A blank layer can be added to a document in PDF Studio. This is useful if you want to place all comments on a separate layer from the document. When adding a layer to a PDF it will always be placed above all other layers currently in the PDF.

How to Add a Blank Layer in a PDF

1. Access the layers pane by clicking the Layers button on the left side of the screen. If the document does not contain any layers, you will need to open the layers pane by going to **View -> Tabs -> Layers** on the menu.
2. Click on the Options button in the top left corner of the layers pane and choose Add Layer
3. Enter the name for the new layer
4. Click OK to create the new layer

Note: *When adding a layer to a PDF it will always be placed above all other layers currently in the PDF.*

Importing PDF as Layer

PDF Studio allows you to import a separate PDF as a new layer into an existing PDF. This is useful if you want to merge several documents on top of one another.

How to Import PDF as a layer

1. Access the layers pane by clicking the Layers button on the left side of the screen. If the document does not contain any layers, you will need to open the layers pane by going to **View -> Tabs -> Layers** on the menu.
2. Click on the Options button in the top left corner of the layers pane and choose Import PDF as Layer
3. Select the PDF file you wish to import as the new layer
4. Set the options for the new layer
5. Once complete, click OK to create the new layer

Import PDF as Layer Options

Source Pages

Page Range - The range of pages to be cropped

- All Pages: all pages in the document
- Page Range: set the pages to be cropped using the From and To options
- Even Pages Only: only crops the even pages
- Odd Pages Only: only crops the odd pages

Import Options

Layer - The layer to import the PDF document into. Select <New Layer> to create a new layer

Layer Name - The name of the layer the document will be imported to. If <New Layer> is selected you will need to enter a name for the new layer

Starting at Page - The page within the current document to begin adding the layers

Show on Print - Whether or not the layer will be displayed when the document is printed.

Insert - Choose to insert the layer on top of or behind the current page content

Assigning Comments to Layers

Comments can be assigned to a specific layer in the document. When the comment is associated with a layer showing or hiding the layer also affects the comments. You can either designate a layer as the Comments Layer, or Move Comments to a new layer. Comments that are associated with No Layer will be a part of the primary PDF content.

Designating the Comments Layer


When a layer is designated as the comments layer all new comments going forward will be added to this layer

1. Access the layers pane by clicking the Layers button on the left side of the screen.
 - **Note:** *If the layers buttons is not displayed this means that the document does not contain any layers. See [Adding a Blank Layer](#) or [Importing PDF as Layer](#) if you wish to create a layer.*
2. Right click (Mac: Ctrl + Click) on the layer you want to set as the comments layer
3. Choose the Comments Layer option in the mouse menu
4. Click OK to confirm
5. Continue working on the document as you normally would

Note: *Repeat steps 1-3 to undesignate the layer as the comments layer*

Moving Comments to a New Layer

Existing comments can be moved to a new layer using the properties dialog

1. Access the Comment properties by right clicking (Mac: Ctrl + Click) on the annotation and choosing Properties in the mouse menu or clicking on the edit button  on the [Mini Toolbar](#).
2. Go to the General tab
3. In the Layer option, select the layer you wish to move the annotation to
4. Click OK to apply the changes

Note: *If the layer selected is currently hidden the annotation will disappear until the layer is displayed again.*

Flattening Comments on Layer

Flattening annotations is the act of painting the annotations directly on the layer to which they belong so they are not editable anymore. This will permanently write an annotation into the document. For instance, a custom signature stamp can be flattened so the signature is added to the document itself and doesn't sit on a document as an annotation anymore.

Note: *The following annotations (links, sounds, and redaction annotations) will NOT be removed when flattening annotations. Even though technically, links, sounds, and redaction annotations are annotations, they contain actions that would also be removed if the annotation was flattened and so they remain to not interfere with the functions placed in the PDF.*

How to Flatten all Comments on Layer

1. Access the layers pane by clicking the Layers button on the left side of the screen.
 - **Note:** *If the layers buttons is not displayed this means that the document does not contain any layers. See [Adding a Blank Layer](#) or [Importing PDF as Layer](#) if you wish to create a layer.*
2. Right click (Mac: Ctrl + Click) on the layer you want to flatten comments
3. Click OK to confirm

Note: *This cannot be undone. Make sure to save a copy before completing this action.*

Layer Properties

PDF Studio allows you to change the properties of layers within the PDF.

How to Access the Layer Properties

1. Access the layers pane by clicking the Layers button on the left side of the screen.
 - **Note:** *If the layers button is not displayed this means that the document does not contain any layers. See [Adding a Blank Layer](#) or [Importing PDF as Layer](#) if you wish to create a layer.*
2. Right click (Mac: Ctrl + Click) on the layer and choose Properties in the mouse menu
3. Set the Layer Property Options you wish to use
4. Click OK to apply the changes

Layer Property Options

Name - The name of the layer

Default State - The default state for the layer when the document is first opened

Lock Layer - When checked, if the document is protected will lock the layer from being changed





Show on Print - Displays whether or not the layer will be displayed when printed.

Side by Side Comparison

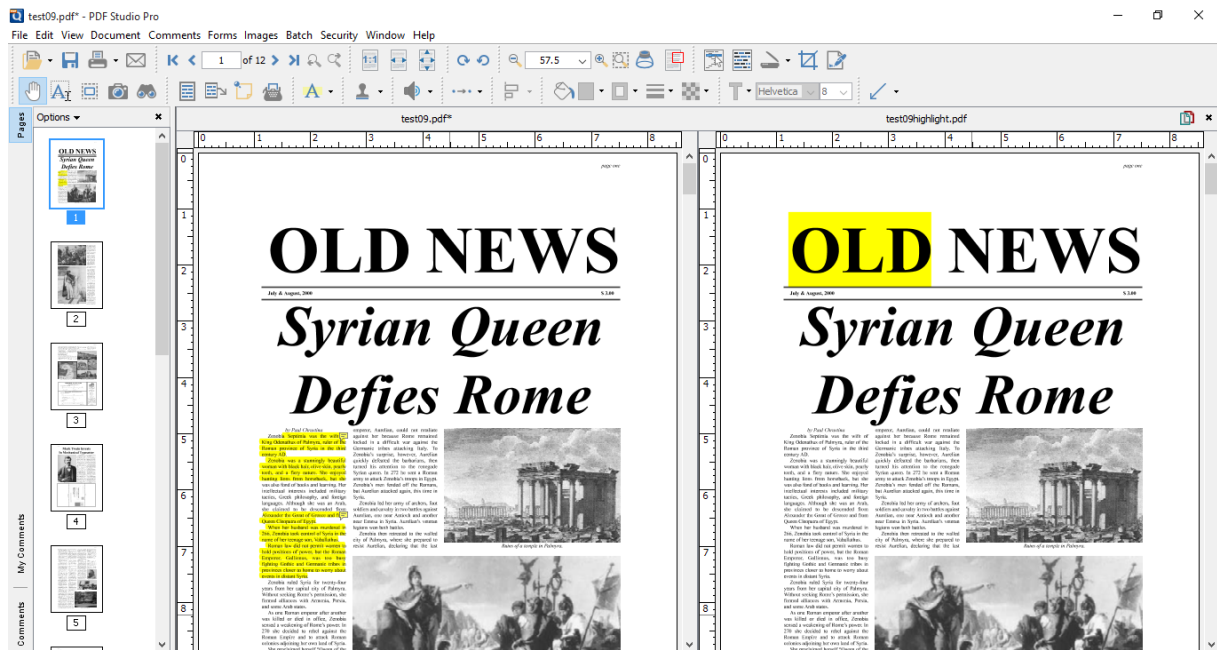
PDF Studio has a Side by Side PDF Comparison tool that allows you to open two PDF documents in the same window next to each other to compare visually. This can be useful when comparing PDF documents that may have text or image revisions.

Instructions:

1. Open the initial or first document in PDF Studio. This will become Document A in the Side by Side comparison
2. Go to **View -> Compare Side by Side...** in the menu bar.

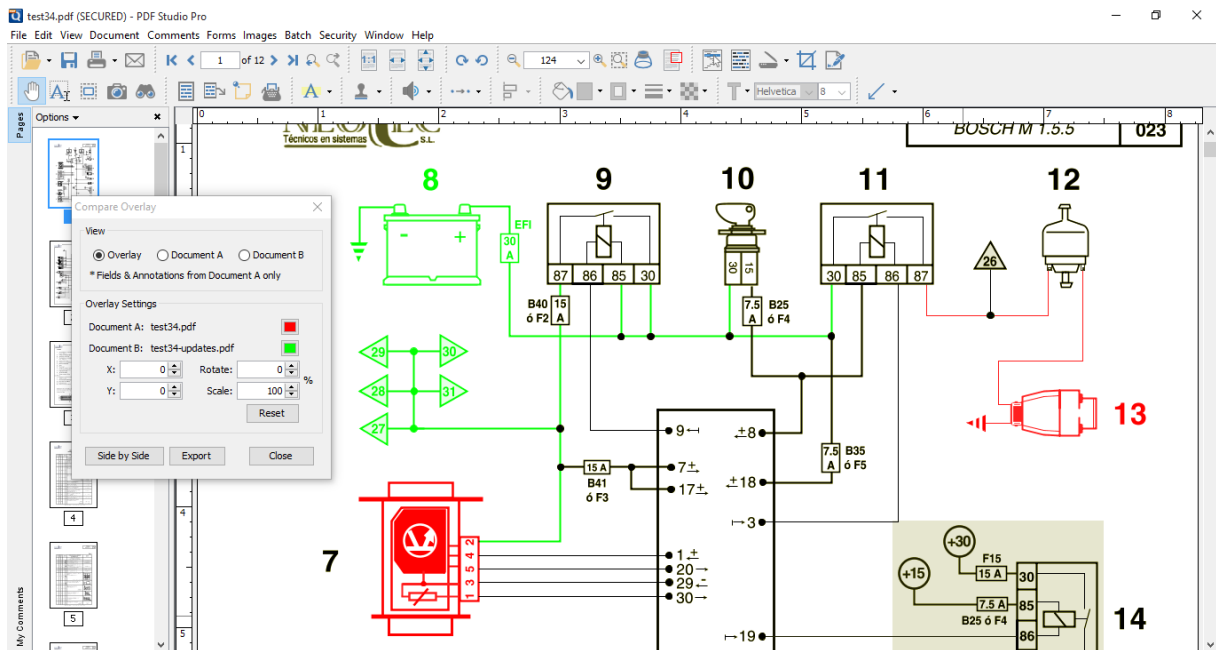
3. Select the second document that you wish to compare with Document A. This will become Document B in the Side by Side comparison
4. You will now see Document A (on the left) and Document B (on the right) opened side by side in the same PDF Studio window.
5. At any time during the comparison, using the toolbar, you can only annotate or markup any changes onto Document A.
6. You can markup Document B by right clicking on Document B and selecting the tool that you wish to use. The tools available for document B are:
7. Sticky Note 
8. Pencil 
9. Select Text  - Once the text is selected you can right click on the highlighted and choose a text markup action.
10. If you would like you can switch over to our Overlay Comparison mode by clicking on the Overlay button  overlay in the top right corner of the above Document B.

Note: When switching over to Overlay Comparison if any changes have been made to Document B they will need to first be saved. PDF Studio will prompt you to do so when switching to Overlay Comparison.



Overlay Comparison

PDF Studio comes with a new PDF Overlay Comparison feature that allows you visually compare documents by overlaying a second document onto the first using different colors to display any differences. This feature is especially useful for architects and engineers to visually identify even small differences in architectural drawing and blue prints. It can be used not only to compare PDF documents but also scans, images or Word documents that have been converted to PDFs using PDF Studio. The overlay comparison is rendered live, making it very easy to perfectly align the 2 documents, moving a pixel up or down, by using the adjustment options provided. This is useful in the case of scanned documents, where position, rotation or scale can be slightly off from one scan to the other.



How to compare two documents using Overlay Comparison

1. Open the initial or first document in PDF Studio. This will become Document A (in Green) in the Overlay Comparison.
2. Go to View -> Compare Overlay in the menu bar.

3. Select the second document that you wish to compare with Document A. This will become Document B (in Red) in the Overlay Comparison
4. You will now see Document B overlayed onto Document A and the Compare Overlay dialog that can be used to make any alignment changes to Document B (in real time) if needed to correctly match up the documents.

The following adjustment options are available:

View

- choose to display both or each document individually

Settings

- Color - select the color of each document (the default colors generally provide the best results). See [Choosing colors for overlay PDF comparison](#).
- X & Y - adjust the X & Y values of Document B to move it left, right, up, or down
- Rotate- adjust the rotation of Document B if needed
- Scale - make Document B smaller or larger if needed

At any time during the comparison you can only annotate or markup any changes onto Document A.*

You can also switch over to our Side by Side comparison mode by clicking on the "Side by Side" button in the Overlay Comparison dialog.

Once you've completed your comparison you can export the comparison into a single document with the Overlay Comparison View as the as the base layer and Documents A & B as layers within the document. If you have completed your comparison and want to exit the comparison mode just close the comparison tool to return back to Document A.

- The Overlay comparison view will be rasterized (turned into an image per page) as the base layer.
- The original Document A - Layer 1
- The original Document B - Layer 2

Note: It is worth noting that all [annotation and text markup tools](#), as well as other PDF editing tools, are still active while in comparison overlay view, allowing to mark up and modify the original PDF. One can also easily switch back and forth between the overlay comparison view and the side by side comparison view (where the 2 documents are displayed side by side in a synchronized way). In side by side comparison, it is possible to annotate the

second document to add sticky notes and text highlights (look under the right-click context menu).

Choosing Colors for Overlay Comparison

The Overlay Comparison feature allows to customize the colors of the 2 documents that are being compared. The colors are be remembered when the "Compare Overlay" dialog is closed. When changing from the default colors, we suggest using complementary colors when comparing PDF documents using the Overlay Comparison feature in PDF Studio. Complementary colors are colors that add up to black which will ensure that the common elements on the two drawings / documents are displayed in black (overlay of the 2 complementary colors).

Using RGB (Red, Green, Blue) values, complementary colors are colors that add up to (255, 255, 255). See below for a few color pairs of complementary colors. The number in parenthesis represent the color in RGB values.

Example Colors

- Cyan (51, 204, 204) / Dark Red (204, 51, 51) These are the default colors in PDF Studio.
- Green (0, 204, 51) / Dark Pink (255, 51, 204)
- Blue (0, 125, 255) / Orange (0, 125, 255)
- Green (0, 255, 0) / Red (0, 255, 0) **Note:** *that the common elements in both drawings will not be as black in this color pair as the colors above because the colors do not add up to black.*

Annotating and Commenting PDFs

Annotations and comments allow you to markup parts of the PDF. While annotations and comments are contained within the PDF they are not a part of the PDF original content. This allows them to be moved, edited, or deleted more easily. This section covers the tasks associated with annotations and comments and also provides examples of each of the markups that can be used in PDF Studio.

Topics covered in this section:

[Creating Annotations](#)

[Setting Annotation Tool Properties](#)

[Set a Status or Check Mark](#)

[Editing Annotations](#)

[Moving Annotations](#)

[Deleting Annotations](#)

[Export Annotations](#)

[Flattening Annotations](#)

[Align Annotations](#)

[Group Annotations](#)

[Import Annotations](#)

[Pasting Clipboard Text](#)

[Pasting a Clipboard Image](#)

[Copy and Paste Annotations](#)

Available Annotation Types:

Below is a list of each of the annotation types and available annotations. You can comment or annotate a document with text, graphics, sound, and hyperlinks.

[Text Annotations](#)



[Text Box](#)



[Callout](#)



[Typewriter](#)



[Sticky Note](#)

[Shape Annotations](#)



[Circle](#)



[Arrow](#)



[Line](#)



[Square](#)



[Pencil](#)



[Polygon](#)



[Cloud](#)



[Polyline](#)

[Text Markups](#)



[Highlight Text](#)



[Cross out Text](#)



[Underline Text](#)



[Squiggly Underline Text](#)



[Replace Text](#)



[Insert Text](#)



[Highlight Area](#)

Rubber Stamp Annotations

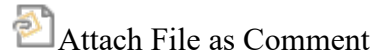


Measurement Annotations

Pro



Media & Other Annotations



Creating Annotations

There are three ways to create a new annotation:

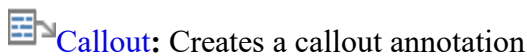
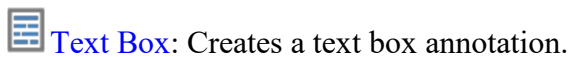
1. From the annotations toolbar, simply click on an annotation tool, and draw the annotation by dragging the mouse on the page.



2. From the menu, choose **Comments**, select a comment category menu, click on an annotation, and draw the annotation by dragging the mouse on the page.
3. Using shortcut keys. Press the keyboard shortcut for the annotation tool you wish to use then draw the annotation as you normally would. See [Keyboard Shortcuts](#) for a list of available shortcuts.

Text Annotations

PDF Studio has the following text annotation tools available.





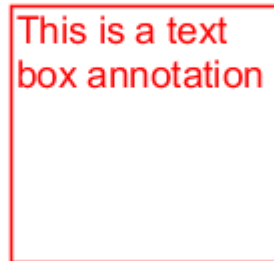
Sticky Note: Creates a typewriter annotation.




Typewriter: Creates a sticky note annotation.

Text Box Annotations

The Text Box tool creates a text note on the document. The text is contained within a box that is created when placing a text box on the page. Once placed you can resize the shapes to reflow the text within the boxes as well as edit additional properties.




Creating a Text Box

1. Select the Text Box tool by clicking the  on the toolbar, going to **Comments -> Text Comments -> Text Box**, or using the shortcut key Ctrl + Alt + T (Command + Alt + T on Mac)
 - **Note:** *If the text annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active text tool to select the text tool you need.*
2. Click and drag to create the rectangle for the text box
3. Type the text you wish to add in the text box
4. To finish press Esc or click elsewhere on the document

Note: *Text on the System Clipboard can be pasted into a PDF document as a Text Box.*

Annotation Properties

To access the Text Box properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Text Box annotation contains the following property settings.

Appearance

Border Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Border Color - Sets the color of the border

Fill Color - Sets the fill color

Text Color - Sets the text color

Horiz Align - Sets the horizontal alignment of the text

Vertical Align - Sets the vertical alignment of the text

Font - Sets the font of the text

Size - Sets the font size of the text

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Note / Comment - Contains the text added to the Text Box

Save as default - When checked this will make the selected appearance settings the default for any new Text Box annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

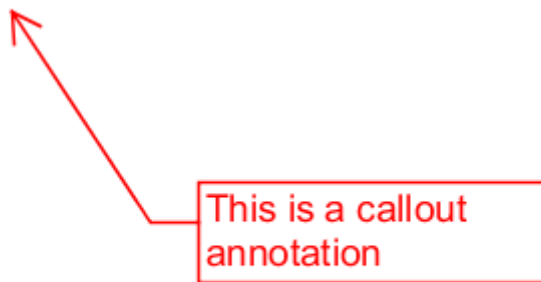
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Callout Annotations


The callout tool creates a text note with an arrow on the document that can point to a specific spot on the page. The text is contained within a box that is created when placing the callout on the page. Once placed you can move the arrow or resize the box to reflow the text within the as well as edit additional properties.



Creating a Callout

1. Select the Callout tool by clicking the  on the toolbar, going to **Comments -> Text Comments -> Typewriter**, or using the shortcut key Ctrl + Alt + W (Command + Alt + W on Mac)
 - **Note:** *If the text annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active text tool to select the text tool you need.*
2. First click where you would like the point of the arrow to be placed then move the cursor to where you would like the attached text box to be placed
3. Type the text you wish to add in the callout
4. To finish press Esc or click elsewhere on the document

Annotation Properties

To access the Callout properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Callout annotation contains the following property settings.

Appearance

Border Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...) **Note:** *When choosing the cloud style on a callout only changes the text box. The line and arrow will remain solid*

Border Color - Sets the color of the border

Fill Color - Sets the fill color

Text Color - Sets the text color

Horiz Align - Sets the horizontal alignment of the text

Vertical Align - Sets the vertical alignment of the text

Font - Sets the font of the text

Size - Sets the font size of the text

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Note / Comment - Contains the text added to the Callout

Save as default - When checked this will make the selected appearance settings the default for any new Callout annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

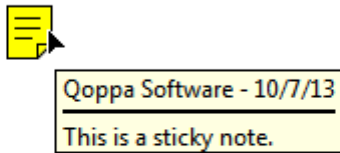
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Sticky Note Annotations


The Sticky Note tool places a note on the document that is hidden until double clicked on or hovered over with the mouse. This is useful if you want to add comments to the document and not have them displayed until needed.



Creating a Sticky Note Annotation

1. Select the Sticky Note tool by clicking the  on the toolbar, going to **Comments -> Text Comments -> Sticky Note**, or using the shortcut key Ctrl + Alt + N (Command + Alt + N on Mac)
 - **Note:** *If the text annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active text tool to select the text tool you need.*
2. Click on the page where you would like to add the note. Once placed the Sticky Note properties dialog will be displayed to allow you to add text to the note
3. Type the text you wish to add in the Note / Comment field
4. Once finished click on OK to create the note

Annotation Properties

To access the Sticky Note properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Sticky Note annotation contains the following property settings.

Appearance

Icon Color - Sets the color of the sticky note icon

Transparency - Sets the transparency of the sticky note icon

Note / Comment - Contains the text added to the Sticky Note

Save as default - When checked this will make the selected appearance settings the default for any new Sticky Note annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)


Typewriter Annotations

The Typewriter tool creates text directly on the document. Useful for adding text to PDF documents that do not have interactive forms.


Note: *Line breaks must be created manually - unlike the text box and callout, the typewriter is sized by the text and line breaks added to it.*

Typewriter annotation

Creating a Typewriter Annotation

1. Select the Typewriter tool by clicking the  on the toolbar, going to **Comments -> Text Comments -> Typewriter**, or using the shortcut key Ctrl + Alt + W (Command + Alt + W on Mac)
 - **Note:** *If the text annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active text tool to select the text tool you need.*
2. Click on the page where you would like to add some text
3. Type the text you wish to add
4. To finish press Esc or click elsewhere on the document

Annotation Properties

To access the Typewriter properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Typewriter annotation contains the following property settings.

Appearance

Text Color - Sets the text color

Font - Sets the font of the text

Size - Sets the font size of the text

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Save as default - When checked this will make the selected appearance settings the default for any new Typewriter annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject


Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)


Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)


Shape Annotations


PDF Studio has the following shape annotation tools available.


 [Circle](#): Creates a circle annotation.


 [Arrow](#): Creates an arrow annotation.


 [Line](#): Creates a line annotation.

 [Square](#): Creates a square annotation.

 [Pencil](#): Creates a pencil annotation.

 [Polygon](#): Creates a polygon annotation.

 [Cloud](#): Creates a cloud annotation.


 [Polyline](#): Creates a polyline annotation.

Circle Annotations


The Circle tool allows you to draw a circle or ellipse on the document. Hold the Shift key while drawing to create a perfect circle. Once placed shapes can be modified by dragging any of the resize handles on the shape.



Creating a Circle Annotation

1. Select the Circle tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Circle**, or using the shortcut key Ctrl + Alt + C (Command + Alt + C on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click and drag to create your shape (**Note:** *Hold the Shift key while drawing to create a perfect circle.*)
 - you can also create a simple shape by just clicking on the page

Annotation Properties

To access the Circle properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Circle annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the border

Fill Color - Sets the fill color

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Circle annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Square Annotations

The Square tool allows you to draw a square or rectangle on the document. Hold the Shift key while drawing to create a perfect square. Once placed shapes can be modified by dragging any of the resize handles on the shape.




Creating a Square Annotation

1. Select the Square tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Square**, or using the shortcut key Ctrl + Alt + Q (Command + Alt + Q on Mac)

- **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click and drag to create your shape (**Note:** *Hold the Shift key while drawing to create a perfect square.*)
 - you can also create a simple shape by just clicking on the page

Annotation Properties

To access the Square properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Square annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the border

Fill Color - Sets the fill color

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Square annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

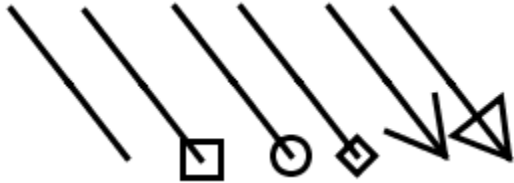
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Line Annotations


The Line tool allows you to draw a line on the document. Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines. Once placed shapes can be modified by dragging any of the resize handles on the shape.



Creating a Line Annotation

1. Select the Line tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Line**, or using the shortcut key Ctrl + Alt + L (Command + Alt + L on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click where you would like the line to begin and then move the cursor where you would like the line to end and click again to place the line on the page (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)

Annotation Properties

To access the Line properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Line annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Line Start - Sets the shape to be used at the beginning of the line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Line End - Sets the shape to be used at the end of the line

Color - Sets the color of the border

Fill Color - Sets the fill color of the shapes at the end of the line

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Line annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Arrow Annotations


The Arrow tool allows you to draw an arrow on the document. The arrow is essentially a line with a default ending using an arrow shape. Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines. Once placed shapes can be modified by dragging any of the resize handles on the shape.



Creating an Arrow Annotation

1. Select the Arrow tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Arrow**, or using the shortcut key Ctrl + Alt + A (Command + Alt + A on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click where you would like the arrow to begin and then move the cursor where you would like the arrow to end and click again to place the arrow on the page (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)

Annotation Properties

To access the Arrow properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Arrow annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Line Start - Sets the shape to be used at the beginning of the line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Line End - Sets the shape to be used at the end of the line

Color - Sets the color of the border

Fill Color - Sets the fill color of the shapes at the end of the line

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Arrow annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Pencil Annotations


The Pencil tool allows you to draw free hand shapes and text on the document. Pencil annotations can consist of multiple marks or gestures. The Delay property on the pencil tool specifies the amount of time to wait before completing the pencil annotation. Once created pencil shapes can be resized by dragging any of the resize handles on the shape.

A hand-drawn red text annotation that reads "pencil Tool". The word "pencil" is written in a cursive, lowercase style, and "Tool" is written in a simpler, uppercase style below it.

Creating a Pencil Annotation

1. Select the Pencil tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Pencil**, or using the shortcut key Ctrl + Alt + P (Command + Alt + P on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click and drag to create your free hand shape.
3. Release the mouse to complete the line
 - **Note:** *There is a delay between when the mouse is released and when the annotation is placed. This is to allow you to create multiple lines (such as drawing a signature) that can be a part of the same single annotation. This delay can be adjusted in [Comments Preferences](#) or by changing the default using the properties dialog.*

Annotation Properties

To access the Pencil properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Pencil annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Color - Sets the color of the border

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Pencil annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

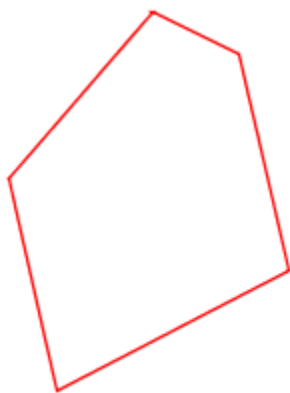
This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Delay Setting


The Delay property on the pencil tool specifies the amount of time to wait before completing the pencil annotation. This is to allow you to create multiple lines (such as drawing a signature) that can be a part of the same single annotation.

Polygon Annotations

The Polygon tool allows you to create shapes and outlines with an arbitrary number of sides on the document. Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines. Once placed shapes can be modified by dragging any of the resize handles on the vertices of the shape.




Creating a Polygon Annotation

1. Select the Polygon tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Polygon**, or using the shortcut key Ctrl + Alt + G (Command + Alt + G on Mac)

- **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click where you would like the first line to begin
 3. Continue clicking on the document to create as many vertices as you need (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
 4. When finished, double-click, press Enter on the keyboard, or right-click and select Complete from the menu to complete the shape

Annotation Properties

To access the Polygon properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Polygon annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the border

Fill Color - Sets the fill color

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Polygon annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

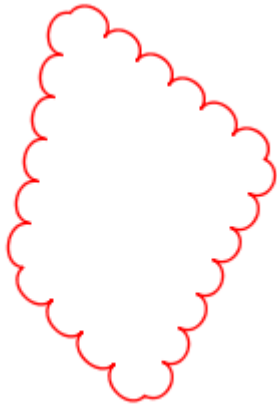
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Cloud Annotations


The Cloud tool allows you to create shapes and outlines with an arbitrary number of sides on the document. The cloud is essentially a Cloud with a default line style using a cloud shape. Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines. Once placed shapes can be modified by dragging any of the resize handles on the vertices of the shape.



Creating a Cloud Annotation

1. Select the Cloud tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Cloud**, or using the shortcut key Ctrl + Alt + B (Command + Alt + B on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click where you would like the first line to begin
3. Continue clicking on the document to create as many vertices as you need (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
4. When finished, double-click, press Enter on the keyboard, or right-click and select Complete from the menu to complete the shape

Annotation Properties

To access the Cloud properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Cloud annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the border

Fill Color - Sets the fill color

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Cloud annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Polyline Annotation


The Polyline tool allows you to create shapes and outlines with an arbitrary number of sides on the document. The Polyline works exactly the same as the Polygon only it can have an open ending or side. Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines. Once placed shapes can be modified by dragging any of the resize handles on the vertices of the shape.



Creating a Polyline Annotation

1. Select the Polyline tool by clicking the  on the toolbar, going to **Comments -> Shape Comments -> Polyline**, or using the shortcut key Ctrl + Alt + Y (Command + Alt + Y on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click where you would like the first line to begin
3. Continue clicking on the document to create as many vertices as you need (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
4. When finished, double-click, press Enter on the keyboard, or right-click and select Complete from the menu to complete the shape

Annotation Properties

To access the Polyline properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Polyline annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, Polyline, etc...)

Color - Sets the color of the border

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Polyline annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject


Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)


Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)


Text Markups


PDF Studio has the following Text Markup tools available.


 [Highlight Text](#): Creates a text highlight annotation

 [Cross Out Text](#): Creates a text crossout annotation

 [Underline Text](#): Creates a text underline annotation

 [Squiggly Underline Text](#): Creates a squiggly underline text annotation

 [Replace Text](#): Creates a replace text annotation

 [Insert Text](#): Creates an insert text annotation



 [Area Highlight](#): Highlights an area on the page

Text Highlight Markup


The Text Highlight tool allows you to select and highlight text, similar to using a highlighter on paper, within the document.

teeth, and a fiery nature. She enjoyed hunting lions from horseback, but she was also fond of books and learning. Her intellectual interests included military tactics, Greek philosophy, and foreign languages. Although she was an Arab, she claimed to be descended from Alexander the Great of Greece and from Queen Cleopatra of Egypt.

Creating a Text Highlight Markup

1. Select the Text Highlight tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Highlight Text**, or using the shortcut key Ctrl + Alt + H (Command + Alt + H on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. Click and drag the mouse over the text that you wish to markup
 - For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.
3. To finish, release the mouse and all text within the selected area will be impacted

Annotation Properties

To access the Text Highlight properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Text Highlight Markup contains the following property settings.

Appearance

Markup Type - Allows you to change the type of text markup on the selected text

Transparency - Sets the transparency of the text markup

Color - Allows you to set the color of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Text Highlight markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History



This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Cross Out Text Markup


The Cross Out Text tool allows you to select and cross out text, similar to drawing a line through text on a page, within the document.

teeth, and a fiery nature. She enjoyed hunting lions from horseback, but she was also fond of books and learning. ~~Her intellectual interests included military tactics, Greek philosophy, and foreign languages.~~ Although she was an Arab, she claimed to be descended from Alexander the Great of Greece and from Queen Cleopatra of Egypt.

Creating a Cross Out Text Markup

1. Select the Cross Out Text tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Cross out Text**, or using the shortcut key Ctrl + Alt + O (Command + Alt + O on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. Click and drag the mouse over the text that you wish to markup
 - For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.
3. To finish, release the mouse and all text within the selected area will be impacted

Annotation Properties

To access the Cross Out Text properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Cross Out Text Markup contains the following property settings.

Appearance

Markup Type - Allows you to change the type of text markup on the selected text

Transparency - Sets the transparency of the text markup

Color - Allows you to set the color of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Cross Out Text markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History



This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Text Underline Markup

The UnderlineText tool allows you to select and underline text, similar to drawing a line under text on a page, within the document.


teeth, and a fiery nature. She enjoyed hunting lions from horseback, but she was also fond of books and learning. Her intellectual interests included military tactics, Greek philosophy, and foreign languages. Although she was an Arab, she claimed to be descended from Alexander the Great of Greece and from Queen Cleopatra of Egypt.

Creating an Underline Text Markup

1. Select the Underline Text tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Underline Text**, or using the shortcut key Ctrl + Alt + U (Command + Alt + U on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. Click and drag the mouse over the text that you wish to markup
 - For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.

3. To finish, release the mouse and all text within the selected area will be impacted

Annotation Properties

To access the Underline Text properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Underline Text Markup contains the following property settings.

Appearance

Markup Type - Allows you to change the type of text markup on the selected text

Transparency - Sets the transparency of the text markup

Color - Allows you to set the color of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Underline Text markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History



This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Squiggly Underline Text Markup


The Squiggly UnderlineText tool allows you to select and add a squiggly underline below the text on the document.

teeth, and a fiery nature. She enjoyed hunting lions from horseback, but she was also fond of books and learning. Her intellectual interests included military tactics, Greek philosophy, and foreign languages. Although she was an Arab, she claimed to be descended from Alexander the Great of Greece and from Queen Cleopatra of Egypt.

Creating a Squiggly Underline Text Markup

1. Select the Squiggly Underline Text tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Squiggly Underline Text**, or using the shortcut key Ctrl + Alt + J (Command + Alt + J on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. Click and drag the mouse over the text that you wish to markup
 - For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.
3. To finish, release the mouse and all text within the selected area will be impacted

Annotation Properties

To access the Squiggly Underline Text properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Squiggly Underline Text Markup contains the following property settings.

Appearance

Markup Type - Allows you to change the type of text markup on the selected text

Transparency - Sets the transparency of the text markup

Color - Allows you to set the color of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Squiggly Underline Text markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

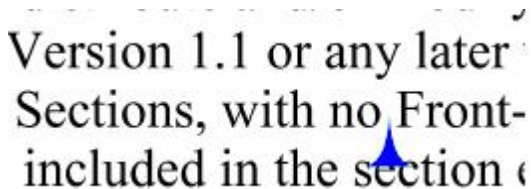
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)


Text Insert Markup

The Insert Text tool allows you to mark a specific point on the page with an annotation showing that text needs to be inserted at that location.




Version 1.1 or any later
Sections, with no Front-
included in the section

Creating an Insert Text Markup

1. Select the Insert Text tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Insert Text**, or using the shortcut key Ctrl + Alt + X (Command + Alt + X on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. The cursor will become a crosshair. Click the crosshair on the desired location for the insert text annotation.
3. To finish, release the mouse and all text within the selected area will be impacted
4. In the properties dialog, select the color of the annotation and add a comment in the content area then click on the Save button.

Annotation Properties

To access the Insert Text properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Insert Text Markup contains the following property settings.

Appearance

Color - Allows you to set the color of the text markup

Size - Sets the size of the insert text annotation symbol

Transparency - Sets the transparency of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Insert Text markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

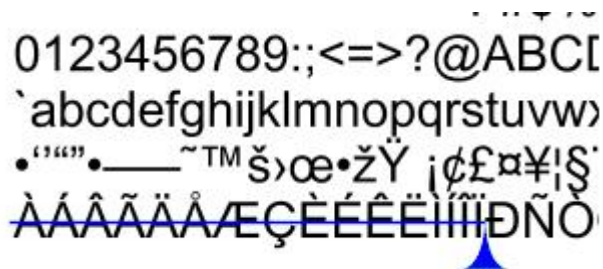
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History



This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Replace Text Markup


The Replace Text tool allows you to mark text for deletion and to replace it with something else using a single annotation.



Creating a Replace Text Markup

1. Select the Replace Text tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Replace Text**, or using the shortcut key Ctrl + Alt + Z (Command + Alt + Z on Mac)
 - **Note:** *If the text markup tools are grouped you may need to click on the down arrow ▼ to the right of the current active text markup to select the text markup tool you need.*
2. Click and drag the mouse over the text that you wish to markup
 - For rectangular text selection, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to  to indicate that a different selection mode is active.
3. To finish, release the mouse and all text within the selected area will be impacted
4. In the properties dialog, select the color of the annotation and add a comment in the content area then click on the Save button.

Annotation Properties

To access the Replace Text properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Replace Text Markup contains the following property settings.

Appearance

Markup Type - Allows you to change the type of text markup on the selected text

Transparency - Sets the transparency of the text markup

Color - Allows you to set the color of the text markup

Note / Comment - A note can be added to text markups that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Replace Text markups going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Area Highlight


Add highlights to scanned documents without text objects.

Note: *An area highlight annotation is simply a square annotation with a transparent background and no border (line width = 0).*

Creating an Area Highlight

1. Select the Area Highlight tool by clicking the  on the toolbar, going to **Comments -> Text Markups -> Area Highlighter**, or using the shortcut key Ctrl + Alt + I (Command + Alt + I on Mac)
 - **Note:** *If the shape tools are grouped you may need to click on the down arrow to the right of the current active shape to select the shape tool you need.*
2. Click and drag to highlight an area (**Note:** *Hold the Shift key while drawing to create a perfect square.*)

Annotation Properties

To access the Area Highlight properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Area Highlight annotation contains the following property settings.

Appearance

Line Width - Sets the width of the border line

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the border

Fill Color - Sets the fill color

Transparency - Sets the transparency of the shape

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Area Highlights going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Rubber Stamp Annotations

PDF Studio is able to apply Rubber Stamp annotations to PDF Documents. PDF Studio comes with some standard rubber stamps but additional text, image, and custom stamps can also be created.

[Rubber Stamp Annotation](#): Creating a rubber stamp annotation

Rotating Rubber Stamps: How to rotate rubber stamps

[Managing Rubber Stamps](#): Managing rubber stamps

[Creating an Image Stamp](#): Creating an image stamp

[Creating a Text Stamp](#): Creating a text stamp

[Creating a Custom Stamp](#)^{Pro}: Creating a custom stamp

[Importing Image as Stamp](#): How to quickly import an image as a stamp



Rubber Stamp Annotation

The Rubber Stamp tool allows you to place a designated stamp on the page similar to using an ink stamp on paper.




Applying a Rubber Stamp Annotation

There are three ways to apply a stamp:

1. Select **Comments > Rubber Stamp** from the menu, and select the stamp you wish to use. Then click the document where you would like to apply the stamp.
2. From the toolbar, click on the down arrow ▼ on the Rubber Stamp  button, and select the stamp that you wish to use. Then click the document where you would like to apply the stamp.
3. Click directly on the Rubber Stamp  button on the toolbar, and then click the document where you would like to apply the stamp.
 - This method will change the pointer to the most recently used stamp, or the default stamp if one has been selected. Hovering the mouse over the Stamps button will display a tooltip with the name of the stamp currently saved. If no stamp has been used, and no stamp is set as a default stamp, the tooltip will say "RubberStamp," and clicking on the button will display the drop down menu of

stamps. A stamp can be set to default by editing the stamp from the Manage Stamps dialog, and selecting the 'Save as default' check box on the edit stamp dialog.

Annotation Properties

To access the Rubber Stamp properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Rubber Stamp contains the following property settings.

Appearance

Transparency - Sets the transparency of the rubber stamp

Rotation - Allows you to set the Rotation of the rubber stamp

Note / Comment - A note can be added to rubber stamps that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Rubber Stamps going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Rotating a Rubber Stamp

There are two ways to rotate a stamp:


Using the Stamp Rotation Handle

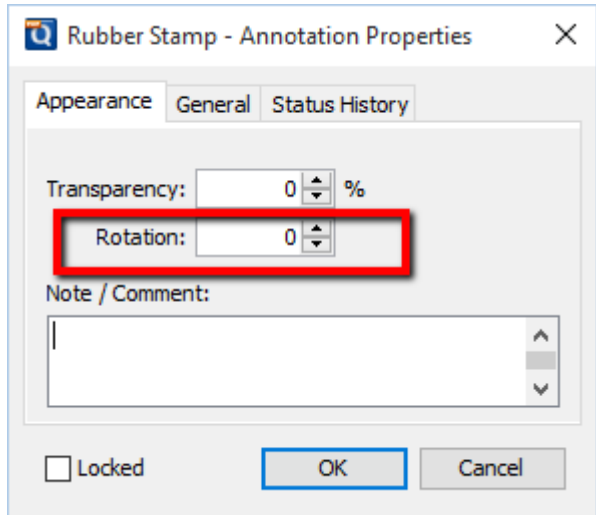
Select the stamp that you wish to rotate. Then click and drag the handle to rotate the stamp.

Note: Hold the Shift key while dragging to rotate the stamp in set increments.



Using the Stamp Properties

To access the Rubber Stamp properties, right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). Then change the rotation value to the desired rotation





Managing Rubber Stamps

Existing rubber stamps as well as newly created stamps can be managed using the Rubber Stamp Manager.

Accessing the Rubber Stamp Manager

The Rubber Stamp Manager can be accessed using one of the two methods listed below.

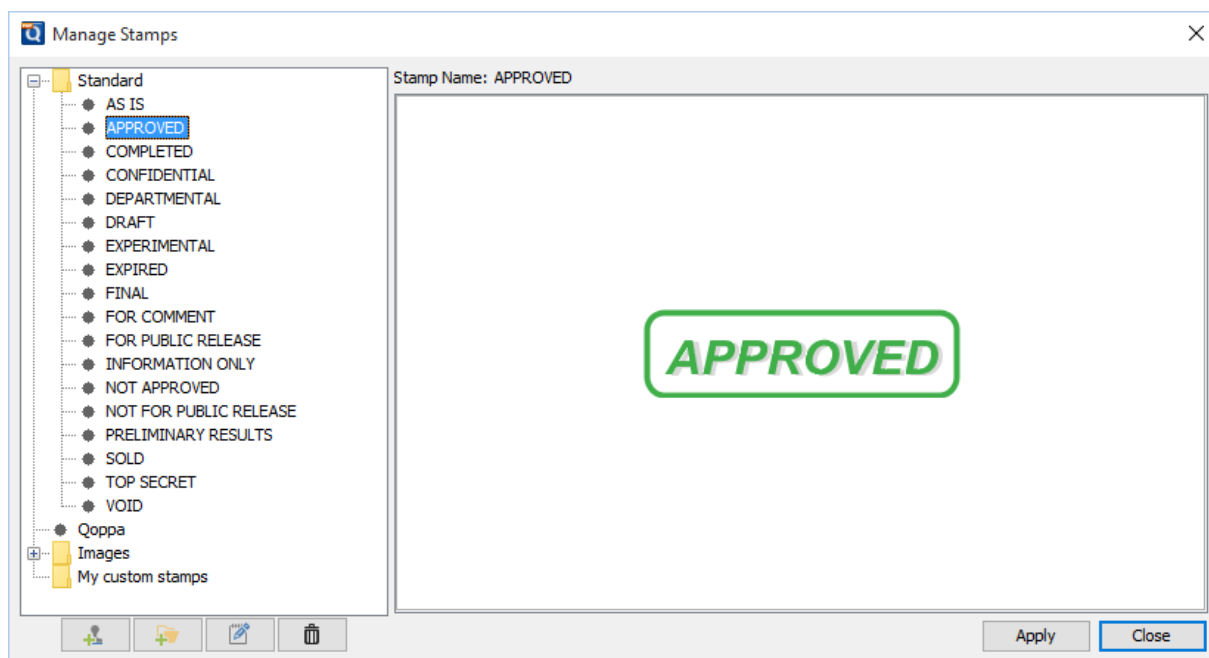
1. Select **Comments > Add Stamp > Manage Stamps** from the menu.
2. From the toolbar, click on the down arrow  on the Rubber Stamp  button, and click on Manage Stamps.

Using the Stamp Manager





The dialog shows a tree of existing stamps and a stamp toolbar to work with the tree. The stamp toolbar has buttons to create, delete, and edit stamps and folders.

The tree will initially have a folder named Standard which contains the following stamps:

As Is, Approved, Confidential, Completed, Confidential, Departmental, Draft, Experimental, Expired, Final, For Comment, For Public Release, Information Only, Not Approved, Not For Public Release, Preliminary Results, Sold, Top Secret, Void.



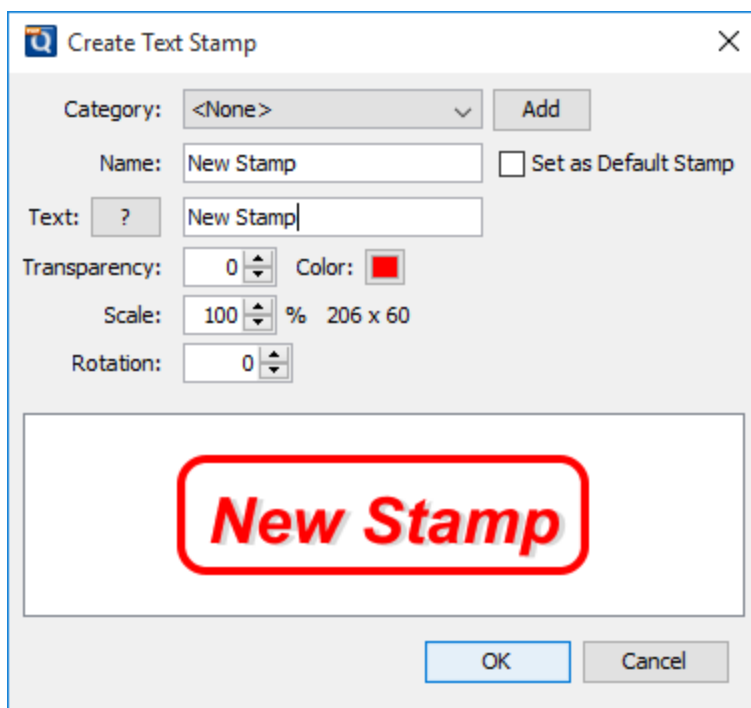
The stamp tree can be modified using the buttons in the stamp toolbar:

-  Create a new stamp
-  Add a new folder to the tree.
-  Bring up the edit dialog for the currently selected stamp.
-  Delete the currently selected node.

Creating a Text Stamp

Text stamps can be created to apply custom text or keywords to a document.

1. Select **Comments > Rubber Stamps > Create Text Stamp** from the menu
2. Enter the options for the new stamp
3. Once complete click on OK to save the new stamp



Create Text Stamp Settings

The options for Text Stamps are as follows:

Category - Category to add this stamp to. Click the Add button to create a new category

Name – Name of the stamp. The name that will be displayed in the Stamps menu

Set as Default Stamp – Check this to set this stamp as the default stamp

Text – Text to be displayed on the stamp. This can be any text or you can use any of the predefined keywords below that will insert the variable's value when the stamp is placed.

Predefined keywords:

- \$page – The page number
- \$author – The user name of the logged in account
- \$totalpages – The number of pages in the document
- \$filename – The file name that the document was opened from
- \$filepath – The full file path that the document was opened from
- \$date – The current date formatted as Nov. 28, 2007
- \$shortdate – The current date formatted as 11/28/07
- \$time – The current time
- \$day – The day of the month
- \$month – The current month, using two digits
- \$year – The current year, using four digits
- \$shortyear – The current year, using two digits
- \$second – The current second
- \$minute – The current minute
- \$hour – The current hour, 1-12
- \$ampm – AM or PM
- \$longhour – The current hour, 0-23

Transparency – Transparency of the stamp

Color – Color of the stamp.

Scale – Change the original image to the size you want your stamp to be

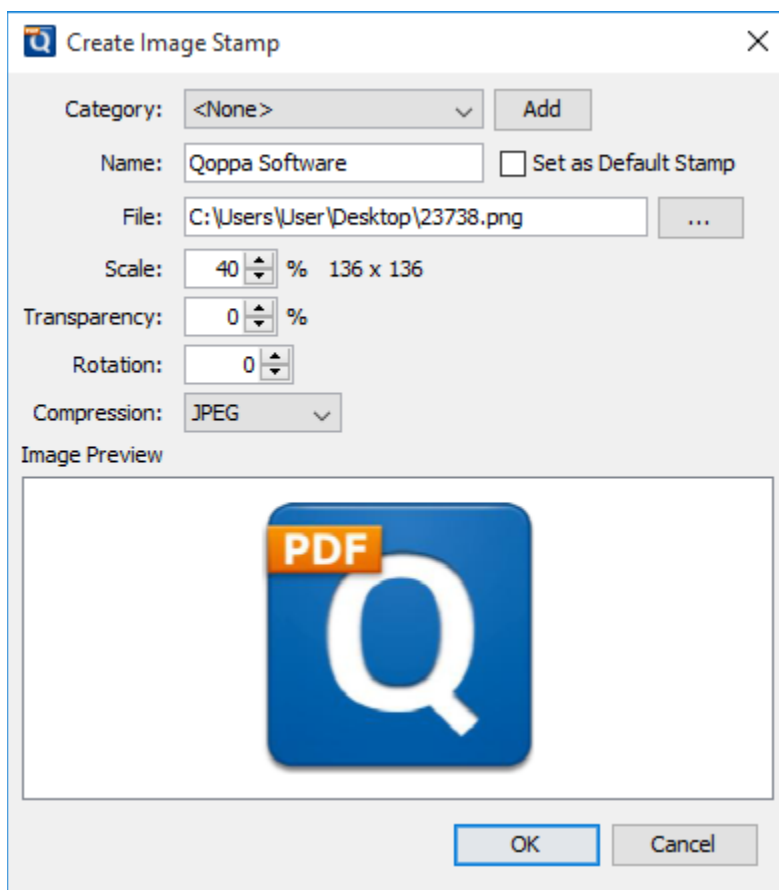
Rotation - The angle the text should be rotated

Creating an Image Stamp

Image stamps can be created from any from any of the supported image (*png, *jpg, *jpeg, *jpe, *gif, *tif & *tiff.) formats to apply a stamp to any document.

1. Select **Comments > Rubber Stamps > Create Text Stamp** from the menu
2. Enter the options for the new stamp

3. Once complete click on OK to save the new stamp



Create Image Stamp Settings

The options for Image Stamps are as follows:

Category - Category to add this stamp to.

Name – Name of the stamp. The name that will be displayed in the Stamps menu.

Set as Default Stamp – Check this to set this stamp as the default stamp

File – The full path to the image file used in the stamp. Click on the "..." button to open a file chooser and navigate to the image you wish to use .

Transparency – Transparency of the stamp

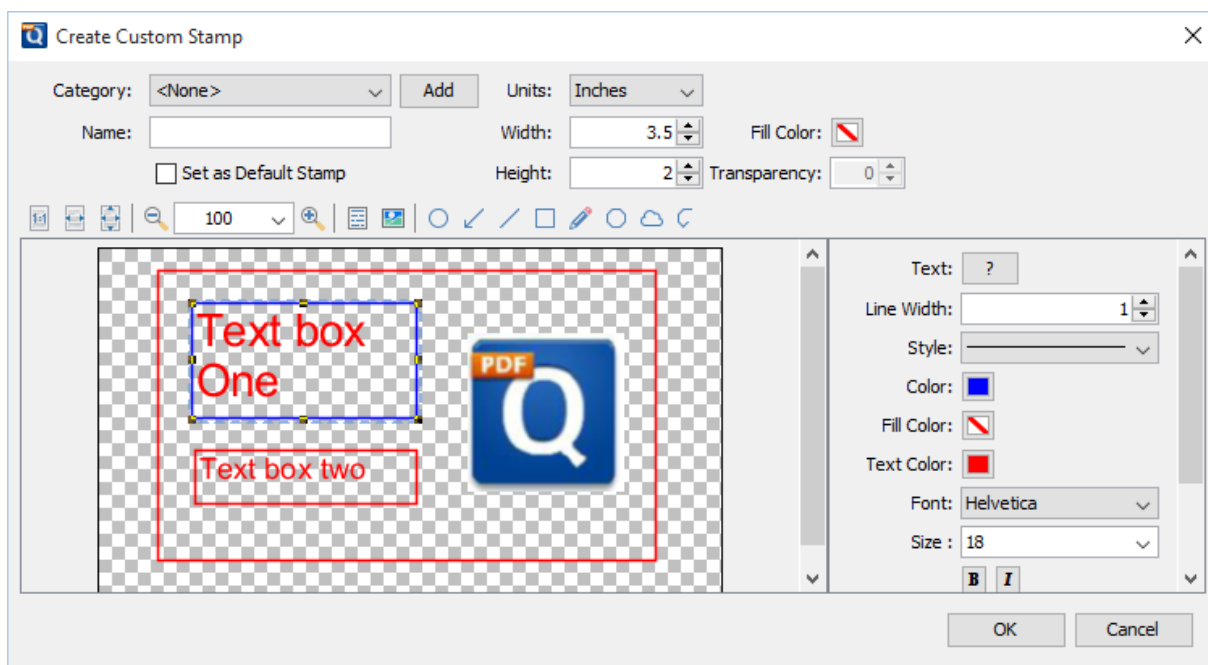
Scale – Change the original image to the size you want your stamp to be

Rotation - The angle the text should be rotated

Creating a Custom Stamp

Custom stamps can be created from a combination of images, shapes, and custom text or keywords that can be applied as a single stamp to a document.

1. Select **Comments > Rubber Stamps > Create Custom Stamp** from the menu
2. Enter the options for the new stamp
3. Use the tools above and to the right of the preview panel to create your custom stamp
4. Once complete click on OK to save the new stamp



Create Custom Stamp Settings

The options for a custom stamp are as follows:

Category - Category to add this stamp to. Click the Add button to create a new category

Name – Name of the stamp. The name that will be displayed in the Stamps menu

Set as Default Stamp – Check this to set this stamp as the default stamp

Units – Enter the units for the size for the custom stamp

Width - The width of the stamp in the units selected

Height - The height of the stamp in the units selected

Fill Color - Choose a color for your custom stamp background.

Transparency - Enter a transparency value for the stamp's fill color.

Custom Stamp Drawing Tools

The following tools are available to use when creating the custom stamp. The tools function as they normally would on a PDF document except these will only be applied to the custom stamp.



Actual Size: Displays the stamp with a 1:1 ratio to match how the document would look if printed without any scaling.



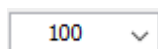
Fit to Width: Scales the view to fit the width of the stamp in the preview window.



Fit to Page: Scales the view to fit the entire stamp within the preview window.



Zoom Out: Zoom out to view the stamp content smaller.



Zoom To/Current Zoom: Displays the current zoom value. You can also select a preset zoom percentage or type in the field for a custom zoom value.



Zoom In: Zoom in to view the stamp content larger.



Text Box: Creates a text box annotation. Use this to add text to the custom stamp



Image: Adds an image to the stamp.



Circle: Creates a circle.

 **Arrow:** Creates an arrow.

 **Line:** Creates a line.

 **Square:** Creates a square.

 **Pencil:** Creates a pencil.

 **Polygon:** Creates a polygon.

 **Cloud:** Creates a cloud.

 **Polyline:** Creates a polyline.


Importing Image as Stamp

Images can be imported directly as a stamp without having to create and save the stamp. Any of the any of the supported image formats (*png, *jpg, *jpeg, *jpe, *gif, *tif & *tiff.) can be used.

Note: *When importing an image directly as a stamp the image will be converted to a JPEG and inserted as is.*

Directions

There are multiple ways to import an image as a stamp

1. Using the Image Tool - click on the Image button 
2. Select **Comments -> Multimedia -> Image** from the menu, or the shortcut key Ctrl + Shift + I (Command + Shift + I on Mac)
3. Select **Images > Import Image as Stamp** from the menu. Then select the image you wish to use.

Once an image stamp has been applied to a page, it is possible to [flatten](#) it so the image is painted directly into the content of the PDF document itself instead of being an annotation sitting on top of it.

To create an image stamp that can be reused instead of an "on-the-fly" stamp, create a [custom image stamp](#).

Measurement Annotations

PDF Studio is able to create measurement annotations to measure distance, perimeter, and area within a PDF.

 [Distance Annotation](#): Creates a distance measurement

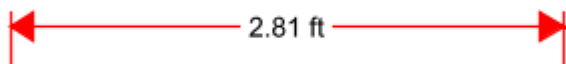
 [Perimeter Annotation](#): Creates a perimeter measurement

 [Area Annotation](#): Creates an area measurement


[Calibrating Measurement Annotations](#): How to calibrate measurements

Distance Annotation


The Distance Measurement Annotation is used to calculate the length a single linear measurement. Once placed measurements can be modified by dragging any of the vertices on the measurement and the values will be updated as well.



Creating a Distance Measurement

1. Select the Distance tool by clicking the  button on the toolbar, going to **Comments - > Measurements -> Distance**, or using the shortcut key Ctrl + Alt + D (Command + Alt + D on Mac)
 - **Note:** *If the measurement tools are grouped you may need to click on the down arrow ▼ to the right of the current active measurement to select the measurement tool you need.*
2. The measurement dialog will be displayed where you can set the scale and precision (and [calibrate](#) if needed) for the measurement prior to drawing the annotation.
3. Click where you would like the measurement to begin and then move the cursor where you would like the measurement to end and click again to place the measurement on the page (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)

Annotation Properties

To access the Distance properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Distance measurement contains the following property settings.

Appearance

Line Width - Sets the width of the line

Line Start - Sets the shape to be used at the beginning of the line

Style - Sets the style for the line (i.e. dotted, dashed, cloud, etc...)

Line End - Sets the shape to be used at the end of the line

Color - Sets the color of the line

Fill Color - Sets the fill color of the shapes at the end of the line

Transparency - Sets the transparency of the measurement

Note / Comment - This will display the value of the measurement and cannot be edited.

Save as default - When checked this will make the selected appearance settings the default for any new Distance annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

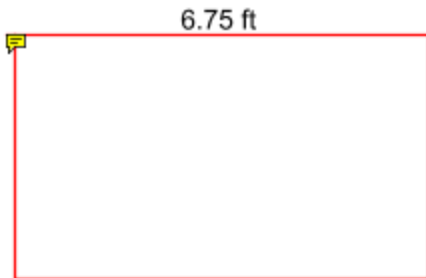
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Perimeter Annotation

The Perimeter Measurement Annotation is used to calculate the length of all sides of a shape or a multi-segment line. Once placed measurements can be modified by dragging any of the vertices on the measurement and the values will be updated as well.




Creating a Perimeter Measurement

1. Select the Perimeter tool by clicking the  button on the toolbar, going to **Comments - > Measurements -> Perimeter**, or using the shortcut key Ctrl + Alt + R (Command + Alt + R on Mac)

- **Note:** *If the measurement tools are grouped you may need to click on the down arrow ▼ to the right of the current active measurement to select the measurement tool you need.*
- 2. The measurement dialog will be displayed where you can set the scale and precision (and [calibrate](#) if needed) for the measurement prior to drawing the annotation.
- 3. Click where you would like the first line to begin
- 4. Continue clicking on the document to create as many vertices as you need (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
- 5. When finished, double-click, press Enter on the keyboard, or right-click and select Complete from the menu to complete the measurement shape

Annotation Properties

To access the Perimeter properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Perimeter measurement contains the following property settings.

Appearance

Line Width - Sets the width of the line

Style - Sets the style for the line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the line

Transparency - Sets the transparency of the measurement

Note / Comment - This will display the value of the measurement and cannot be edited.

Save as default - When checked this will make the selected appearance settings the default for any new Perimeter annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

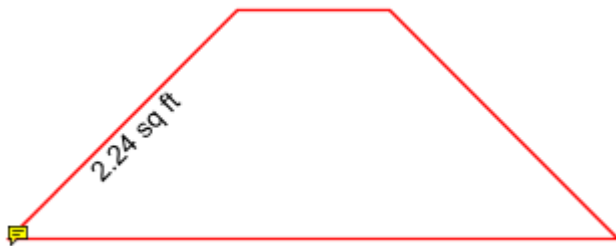
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Area Annotation


The Area Measurement Annotation is used to calculate the area of a given shape. Once placed measurements can be modified by dragging any of the vertices on the measurement and the values will be updated as well.



Creating a Perimeter Measurement

1. Select the Area tool by clicking the  button on the toolbar, going to **Comments -> Measurements -> Area**, or using the shortcut key Ctrl + Alt + E (Command + Alt + E on Mac)
 - **Note:** *If the measurement tools are grouped you may need to click on the down arrow ▼ to the right of the current active measurement to select the measurement tool you need.*
2. The measurement dialog will be displayed where you can set the scale and precision (and [calibrate](#) if needed) for the measurement prior to drawing the annotation.
3. Click where you would like the first line to begin
4. Continue clicking on the document to create as many vertices as you need (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
5. When finished, double-click, press Enter on the keyboard, or right-click and select Complete from the menu to complete the measurement shape

Annotation Properties

To access the Area properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Area measurement contains the following property settings.

Appearance

Line Width - Sets the width of the line

Style - Sets the style for the line (i.e. dotted, dashed, cloud, etc...)

Color - Sets the color of the line

Transparency - Sets the transparency of the measurement

Fill Color - Sets the fill color of the area annotation

Note / Comment - This will display the value of the measurement and cannot be edited.

Save as default - When checked this will make the selected appearance settings the default for any new Area annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

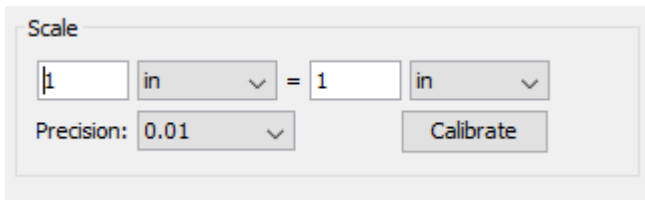
Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)

Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Calibrating Measurement Annotations

Measurements can be calibrated prior to being placed on the page. This can be done manually if the scale is known or automatically using the calibrate tool. This allows you to make accurate measurements based on the scale determined by the PDF.



How to Calibrate Measurements

Manual Calibration

Set the measurement scale manually

1. Start a measurement annotation tool (Distance, Perimeter, or Area)
2. In the dialog enter the scale and units using the fields provided.
3. Once complete you can continue measuring with the tool selected as normal.

Calibration Tool

Set the scale directly from an existing measurement on the page.

1. Start a measurement annotation tool (Distance, Perimeter, or Area)
2. Click the Calibrate button.
3. A dialog will be displayed with instructions on how to calibrate the measurements "Select two points to calibrate the measuring tool", click OK
4. Find a known length on the document (for example a scale on an architectural drawing or previously measured segment)
5. Click on the beginning point of the known scale then click on the end point of the known scale to finish the line. (**Note:** *Hold the Shift key while drawing to make horizontal, vertical, or 45 degree angle lines.*)
6. Enter the distance and the units between the two points that the line represents.
7. Click OK to apply this scale to the measurement dialog.
8. Once complete you can continue measuring with the tool selected as normal.

Media & Other Annotations




Image Annotation

Images can be imported directly as a stamp without having to create and save the stamp. Any of the any of the supported image formats (*png, *jpg, *jpeg, *jpe, *gif, *tif & *tiff.) can be used.


Note: *When importing an image directly as a stamp the image will be converted to a JPEG and inserted as is.*

Creating an Image Annotation

1. Select the Image tool by clicking the  on the toolbar, going to **Comments -> Multimedia -> Image**, or using the shortcut key Ctrl + Shift + I (Command + Shift + I on Mac)
 - **Note:** *If the multimedia annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active multimedia tool to select the tool you need.*
2. Click on the page where you would like to add the image annotation.

To create an image stamp that can be reused instead of an "on-the-fly" stamp, create a [custom image stamp](#).

Annotation Properties

To access the Image Stamp properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Image contains the following property settings.

Appearance

Transparency - Sets the transparency of the image

Rotation - Allows you to set the Rotation of the image

Note / Comment - A note can be added to image stamps that will be displayed when hovered over by the mouse

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Layer - Only available when the document contains layers. Sets the layer that the annotation belongs to. For more information see [Assigning Comments to Layers](#)





Status History

This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)


Sound Annotation

The Sound annotation tool allows you to add a sound annotation to a page either from an existing file (.au, .aiff, or .wav sound file) or a microphone recording.

Creating a Sound Annotation


1. Select the Sound tool by clicking the  on the toolbar, going to **Comments -> Multimedia -> Sound**, or using the shortcut key Ctrl + Alt + S (Command + Alt + S on Mac)
 - **Note:** *If the multimedia annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active multimedia tool to select the tool you need.*
2. Click on the page where you would like to add the sound annotation. Once placed the Sound properties dialog will be displayed showing the microphone recording tools.
 - Alternatively, you can attach an existing file by clicking Load File and then browse to the file you wish to attach. (only .au, .aiff, or .wav files are supported)
3. Select a microphone and then click the  button to start recording and the  to stop recording. To listen to the recording click on the  button
4. Once finished click on OK to save and create the sound annotation

Annotation Properties

To access the Sound annotation properties or listen to the audio double click on the sound annotation, right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu, or click on the edit button  on the [Mini Toolbar](#). The Sound annotation contains the following property settings.

Icon Color - The color of the sound annotation icon

Sound Properties - The properties of the attached audio file or recording

 - Allows you to play the attached audio file

 - Stops the playing audio

Link Annotations

Use the link tool to create and edit links within the PDF. Links can also be automatically generated and removed.


[Creating Links](#): How to create links

[Auto Create Links](#): Using the auto create link tool


[Remove All Links](#): Removing all links from a document

Creating Links

The Link tool allows you to designate an area within the PDF that can be linked to a web page, pages in a PDF document, or even have custom actions.

1. Select the Link tool by clicking the  on the toolbar, going to **Comments -> Multimedia -> Link**, or using the shortcut key Ctrl + Alt + K (Command + Alt + K on Mac)
 - **Note:** *If the multimedia annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active multimedia tool to select the tool you need.*
2. Click and drag to select the area that you wish to make a link (**Note:** *Hold the Shift key while drawing to create a perfect square.*)
 - You can also select the desired text area and right-click on the selected text (CTRL + Click on Mac), choose "Create Link" in the context menu.
3. After the link annotation is added, the Link Properties dialog is displayed.
4. Set the options for the link:
 - **Appearance**
 - Border Width - Sets the width of the border line
 - Border Color - Sets the color of the border line
 - **Action**
 - Open a web link. Examples of valid links:
 - <http://www.qoppa.com>
 - <ftp://ftp.site.com>
 - <file:c:\qoppa\temp.txt>
 - <mailto:johndoe@gmail.com>
 - Go to a page in this document
 - Page Number - the page number of the document to link to
 - Zoom - Set the page fit when navigating to the page
 - Percent - The zoom level for Custom zoom setting
 - Set Visually - Allows you to set the location of the link visually
 - Go to a page in another document
 - Page Number - the page number of the document to link to
 - Document - The full path to the file to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.
 - Custom link - Allows you to add custom [Link Actions](#) from a list of available actions.
5. Once complete, click OK to create the link

Link Properties

To access the Link properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). Links contain the following property settings.

Appearance

Border Width - Sets the width of the border line

Border Color - Sets the color of the border line

Action

The Action Panel displays a list of the current actions associated with the link. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Link Action](#) from a list of available actions.

Edit - Edits the currently selected action from the list

Remove - Removes the currently selected action from the list

Custom Link Actions

When adding a link to a PDF document custom actions can be created instead of the standard link options. Below is a list of each of the custom actions and their settings.

Go to a page in this document

Sets the link to go to a page within the current document

- Page Number - the page number of the document to link to
- Zoom - Set the page fit when navigating to the page
- Percent - The zoom level for Custom zoom setting
- Set Visually - Allows you to set the location of the link visually

Go to a page in another document

Sets the link to go to a page within a different designated document

- Page Number - the page number of the document to link to
- Document - The full path to the document to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: *When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a [File Attachment](#) instead.*

Show/Hide Fields

Sets the link to either Show or Hide selected fields within the document

- Show - Will show the selected fields when clicked
- Hide - Will hide the selected fields when clicked
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields

Open File

Sets the link to open a specific file.

- File - The full path to the file to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: *When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a [File Attachment](#) instead.*

Open a web link

Set's the link to open a specific web page or start an email. Examples of valid links:

- <http://www.qoppa.com>
- <ftp://ftp.site.com>
- <file:c:\qoppa\temp.txt>
- <mailto:johndoe@gmail.com>

Reset Form Fields

Sets the link to reset the selected fields within the document

- All Fields - When checked will reset all the fields within the document
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields

JavaScript Action

Sets the link to perform a custom [Supported JavaScript](#) action that can be typed into the field.

Submit Form

Sets the link to send the form field values to a designated location in one of 4 formats. This can be used to have an automatic way to send back forms or values once a user has completed the form.

- URL - The destination to send the selected file to. Examples of valid links:
 - <http://www.qoppa.com>
 - <ftp://ftp.site.com>
 - <file:c:\qoppa\temp.txt>
 - <mailto:johndoe@gmail.com>
- FDF - Sends an FDF file containing the selected field values
- XFDF - Sends an XFDF file containing the selected field values
- PDF - Sends a copy of the entire PDF
- HTML - Sends an HTML file containing the selected field values
- Fields - Sets the options when sending the field values
 - All Fields - Will send all fields regardless of value
 - Include - Will include the selected fields in the list when sending the file
 - Exclude - Will exclude the selected fields in the list when sending the file
 - Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields
 - Send Empty Fields - When checked will send the selected fields values even when fields are empty

Show/Hide Layers

Sets the link to either Show or Hide selected layers within the document

- Use Current Visibility - Sets the action to display the layers as they are currently being displayed so that if layers are turned off later they will return to the current state
- Other - Sets a new action for the layer using the blow options
 - Show - Will show the selected layers in the list
 - Hide - Will hide the selected layers in the list
 - Toggle - Will switch the selected layer(s) state from hidden to displayed or displayed to hidden depending on the layers current state
 - Layers List - Displays a list of the layers in the document to select. To select more than one layer use Ctrl + Click to select separate layers or Shift + Click to select a group of layers

Named Action

Sets the link to perform one of standard predefined actions listed below.

- NextPage - Goes to the next page in the document
- PrevPage - Goes to the previous page in the document
- FirstPage - Goes to the first page in the document
- LastPage - Goes to the last page in the document
- Print - Starts the print dialog to print the current document
- Save - Saves the current document
- Open - Displays the open file dialog

Auto Create Links

The Auto Create Links tool within PDF Studio allows you to search the entire document to automatically create links for the defined criteria set by the user. Once the text is found using the defined settings links can be automatically applied to the document at each of the text locations.

Note: *The PDF must contain searchable text in order for the Auto Create Links tool to work*

Automatically Creating Links

Search for

1. Select **Comments > Multimedia > Auto Create Links**.
2. Set the search options for the type or specific text you wish to find in the document using the below settings
 - Web Links - Searches for text strings that contains "http://" or "www."
 - Email Links - Searches for emails matching the standard "...@..." format
 - Search Text - Searches for specific text defined by the user
 - Case Sensitive - When checked will only find the specific text matching the exact case (i.e. searching for capital "A" will ignore lowercase "a")
 - URL - Defines what web address to set as the link when searching by text
3. Click Find to search the document for text that appears depending on which "search for" options are selected. The matching text that is found based on the search options set will be displayed in the table below.
4. Check the boxes in the "Make" column of the text you wish to add links to.
5. The link to be created is displayed in the "Link" column of the table. This value can be edited by double clicking on the Link you wish to edit. Once finished editing click anywhere else to finish editing.

- Examples of valid links:
 - <http://www.qoppa.com>
 - <ftp://ftp.site.com>
 - <file:c:\qoppa\temp.txt>
 - <mailto:johndoe@gmail.com>
- 6. Set the options for the Links that will be created for the selected text
 - Border Width - Sets the width of the border line
 - Border Color - Sets the color of the border line
 - Text Color - This will change the color of the text that was found. Useful if you want others to know that the text is now a link.
- 7. Click on the Make button to create the links in the document

Once created the links function just as normal [Link Annotations](#) and can be edited as normal.

Removing all Links

To automatically remove all links from a document, select **Comments -> Multimedia -> Remove All Links**. Once the removal is confirmed, all links in the document will be deleted.

File Attachment Annotations

PDF Studio allows you to attach files to a PDF either as an attachment or as a comment. Attached files can also be opened, saved, and deleted from with PDF Studio.

[Attaching a File](#): How to embed a file to the PDF

[Attaching a File as a Comment](#): Embedding a file with a comment

[Opening an Attached File](#): Opening attached files from the PDF


[Saving Attached File](#): Saving attached files from the PDF

[Deleting an Attached File](#): Deleting attached files from the PDF

Attaching a File

Files can be attached directly to a PDF Document. When files are attached directly to a PDF document they are embedded within the PDF file directly so that when the PDF is sent to another user they can still have access to the file. Once a file is attached the file will be displayed in the Attachments Pane on the left of the PDF Studio window.

Note: *Attaching a file does increase the size of the PDF. If size is a concern try using a [Link](#) instead that will open the file from another location.*


1. Select the Attach File tool by clicking the  on the toolbar, going to **Comments -> Multimedia -> Attach File**, or using the shortcut key Ctrl + Shift + F (Command + Shift + F on Mac)
 - **Note:** *If the multimedia annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active multimedia tool to select the tool you need.*
2. A file chooser dialog will be displayed where you can navigate and select the file you wish to attach.
3. Once complete, click Open to attach the file

Note: *You can also drag and drop files onto the attachments tab to attach them as an embedded file.*

Attaching a File as a Comment


When attaching a file as a comment an icon is added to the page letting the user know that a file has been attached. Files attached as a comment are still embedded within the PDF just the same as when attaching a file without a comment. When files are attached directly to a PDF document they are embedded within the PDF file directly so that when the PDF is sent to another user they can still have access to the file.

Note: *Attaching a file as a comment does increase the size of the PDF. If size is a concern try using a [Link](#) instead that will open the file from another location.*

1. Select the Attach File tool by clicking the  on the toolbar, going to **Comments -> Multimedia -> Attach File as Comment**
 - **Note:** *If the multimedia annotation tools are grouped you may need to click on the down arrow ▼ to the right of the current active multimedia tool to select the tool you need.*

2. Click on the page where you would like to add the file comment.
3. Once placed, a file chooser dialog will be displayed where you can navigate and select the file you wish to attach. Once you've selected the file click Open.
4. The File Attachment properties dialog will be displayed. Set the options for the comment and then click OK to place the note on the page
 - **Icon** - Sets the icon to be used for the file comment
 - **Transparency** - Sets the transparency of the file comment icon

File Comment Properties

To access the File Comment properties right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The File Comment contains the following property settings.

Appearance

Icon - Sets the icon to be used for the file comment

Transparency - Sets the transparency of the file comment icon

File - Displays the file name associated with this file comment icon

Opening Attached File

Files attached to PDFs can easily be opened. Depending on how the file is attached use one of the two methods below to open the file.

Note: *PDF Studio simply sends the file to your operating system for opening. If your operating system doesn't recognize the type of file or doesn't have the appropriate application to open the file, nothing will happen.*

Embedded Files

- If the file is attached as an embedded file, go to the attachments tab where the list of attached files is displayed, and double-click on the attached file. You can also right-click (Mac: Ctrl+Click) on the attached file and choose Open File.

Files Attached as Comment

- If the file is attached as a comment, double-click on the file attachment comment on the page. You can also right-click (Mac: Ctrl+Click) on the file attachment comment and

choose Open File. You can also open the file from the attachments tab as you would embedded files.

Saving Attached File

Files attached to PDFs can easily be saved directly to your computer so that they no longer have to be accessed through the PDF. Depending on how the file is attached use one of the two methods below to save attached files.

Embedded Files

- If the file is attached as an embedded file, go to the attachments tab where the list of attached files is displayed, right-click (Mac: Ctrl+Click) on the attached file and choose Save File.

Files Attached as Comment

- If the file is attached as a comment, right-click (Mac: Ctrl+Click) on the file attachment comment on the page or in the attachments tab and choose Save File.

Deleting Attached File

Files attached to PDFs can easily be deleted so that they are no longer a part of the PDF. Depending on how the file is attached use one of the two methods below to delete attached files.

Embedded Files

- If the file is attached as an embedded file, go to the attachments tab where the list of attached files is displayed, right-click (Mac: Ctrl+Click) on the attached file and choose the option Delete.

Files Attached as Comment

- If the file is attached as a comment, select the file attachment comment on the page and click delete. You can also right-click (Mac: Ctrl+Click) on the file attachment comment and choose Delete. You can also delete the file from the attachments tab as you would embedded files.

Editing Annotations

PDF Studio allows you to edit existing annotations in the PDF Document using a variety of methods.

[Editing the Annotation Comment](#): Edit the comment associated with the annotation using the Comment popup

Using the [Quick Properties Toolbar](#): Edit the properties using the Quick properties toolbar

[Annotation Properties Dialog](#): Edit the annotation properties using the full properties dialog

Moving Annotations: Moving annotations on the page

[Deleting Annotations](#): Deleting annotations on the page

[Flattening Annotations](#): Flattening annotations on the page



Copy & Paste Annotations: Copy and Pasting annotations on the page or across documents

[Aligning Annotations](#): Aligning annotations on the page

[Grouping Annotations](#): Grouping annotations together

Moving & Resizing Annotations

Annotations can be moved or resized after being placed on the page.

1. Using the Hand Tool  or Object Selection Tool  Select the annotation that you wish to edit.
 - **Note:** *More than one annotation can be selected at a time*

Move

Click on the annotation and drag it to its new location on the page.

Note: *Text markups cannot be moved*




Resize

Simply drag the corner or vertex handles to change the bounds of the annotation.

Deleting Annotations

Annotations on the page can be deleted using any of the below options

Delete a Specific Annotation:

1. Using the Hand Tool  or Object Selection Tool  Select the annotation that you wish to delete.
2. Delete the annotation by pressing the Del key, click on the Delete button  on the [Mini Toolbar](#), or right-click on the annotation (CTRL + Click on Mac), choose "Delete" in the context menu.

Delete All Annotations on Any Given Page:

From the menu, choose **Comments > Delete Comments on Current Page**.


Delete All Annotations:

From the menu, choose **Comments > Delete All Comments**.

Editing the Annotation Comment

An annotation's note can be edited by double-clicking directly on the annotation. This will display a small pop that will allow you to edit just the comment on the annotation. Type in the field to add, change, or delete the comment on the note. Once done click on the "x" or any where on the page to save the comment.

Annotation Properties Dialog

To access the annotation's full properties dialog right click (Mac: Ctrl + Click) on the annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#).

Each type of annotation has its own list of options. For a more detailed description of each of the annotation's available properties go to that specific annotation's page.

Property Dialog Tabs

Appearance

Where to edit all of the appearance settings of the annotation as well as the comment and default settings

General

Displays the author and subject information of the comment

Status History



This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Flattening Annotations

Flattening annotations is the act of painting the annotations directly on the page to which they belong so they are not editable anymore. This will permanently write an annotation into the document. For instance, a custom signature stamp can be flattened so the signature is added to the document itself and doesn't sit on a document as an annotation anymore.

Note: *The following annotations (links, sounds, and redaction annotations) will NOT be removed when flattening annotations. Even though technically, links, sounds, and redaction annotations are annotations, they contain actions that would also be removed if the annotation was flattened and so they remain to not interfere with the functions placed in the PDF.*

Flatten a Specific Annotation:

1. Using the Hand Tool  or Object Selection Tool  Select the annotation that you wish to flatten.
2. Right-click on the annotation (CTRL + Click on Mac), choose "Flatten" in the context menu.

Flatten All Annotations:

From the menu, choose **Comments > Flatten Comments on Current Page**.

Flatten All Annotations on Any Given Page:

From the menu, choose **Comments > Flatten Page Comments**.

Copy & Paste Annotations

All annotations can be copied using Ctrl+C (Mac: Cmd+C) and pasted using Ctrl+V (Mac: Cmd+V) or by right clicking (Mac: Ctrl + Click) and selecting copy or paste. The copy command will copy any selected annotation to the system clipboard. If an annotation is in the system clipboard when the paste command is pressed, a copy of that annotation will be placed in the center of the screen. On subsequent pastes at the same location, the annotation will be pasted at a slight offset so that they are not placed directly on top of each other.

To paste an annotation onto a different page:

1. Copy the annotation
2. Navigate to the new page
3. Click on the page with the mouse to select the page
4. Paste the annotation using Ctrl+V (Mac: Cmd+V)

Pasting Clipboard Images as a Stamp

When an image is on the system clipboard, it can be pasted onto a page by following the steps below:

1. Navigate to the page.
2. Click on the page with the mouse to select the page.

3. Paste the image using Ctrl+V (Mac: Cmd+V) onto the page. This will paste the image as a Rubber Stamp annotation that can be moved around or resized after it has been placed.

Note: *If Adjust To Zoom is selected in [General Preferences](#), the initial size of the pasted image will depend on the zoom level of the document. Otherwise, the image will be pasted at its original size.*

Pasting Clipboard Text as a Text Box



When text is on the system clipboard, it can be pasted onto a page by following the steps below:

1. Navigate to the page.
2. Click on the page with the mouse to select the page.
3. Paste the text using Ctrl+V (Mac: Cmd+V) onto the page. Doing so will paste the text as a [Text Box Annotation](#) using default properties. The annotation can be moved around and resized after it has been placed.

Aligning Annotations

Annotations can be aligned or evenly distributed on the page if needed. Annotations can be aligned using any of the below methods. When aligning annotations 2 or more annotations must be selected.



From the Toolbar

1. Using the Hand Tool  or Object Selection Tool  Select the annotations that you wish to align.
2. Click the button on the toolbar to align the annotation
 - **Note:** *If the alignment tools are grouped you may need to click on the down arrow ▼ to the right of the current active alignment tool to select the alignment tool you need.*












From the Menu

Go to **Comments -> Alignment** and then select the alignment you wish to perform

From Right Click Context Menu

1. Using the Hand Tool  or Object Selection Tool  Select the annotations that you wish to align.
2. Right click, (Mac: Ctrl + Click) on any of the selected annotations and go to Alignment and select the alignment you wish to perform

Alignment Examples

Original	Distribute Horizontally 	Distribute Vertically 
Align Left 	Align Center 	Align Right 
Align Top 	Align Middle 	Align Bottom 
Align Width 	Align Height 	Align Both 

Group Annotations

A group of annotations is comprised of one parent annotation and one or more child annotations. Any operation (delete, move, etc.) performed upon one annotation in a group will also be performed on the rest of group. Also, all children will display their parent's comments.

Create a group by selecting two or more annotations, right-clicking (Mac: Ctrl+click) on one of them, and choosing Group from the mouse context menu. The annotation that was right-clicked will be the parent.

Annotations may be ungrouped by right-clicking (Mac: Ctrl+click) on an annotation group and choosing Ungroup from the mouse context menu.

Note: that the following annotations cannot be included in a group: sound and text replace annotations.

Setting Annotation Tool Properties

The tool's properties determine its default appearance and how the tool behaves after the annotation is created. The default properties can be accessed by right clicking (Mac: Ctrl+click) the tool icon in the toolbar or by going to [Comments Preferences](#).

Tool Properties

Each type of annotation has its own list of options. For a more detailed description of each of the annotation's available properties go to that specific annotation's page.

Sticky Annotations

When the tool is "sticky", the tool remains selected after a new annotation is added to the document until it is turned off. This allows you to place many annotations without having to reselect the tool. Once active click the button on the toolbar again to disable the tool.

Always Show Dialog

The Always Show Dialog check box determines whether the annotation properties dialog will be displayed after each new annotation is added to the document.

Setting a Status or Check mark

Setting the status or marking an annotation can be useful for keeping track of which annotations you have already reviewed. To set a status or checkmark, right click (Mac: Ctrl-Click) on the annotation and select Mark with Checkmark or select a status from the Review submenu.

The active annotation's checkmark can also be toggled in the [Comments Pane](#) with the Spacebar.

The review history is saved each time the annotation status is modified and can be viewed in the Status History tab on the [Annotation Properties Dialog](#).

Comments Panel

View the comments panel by selecting **View -> Tabs -> Comments** or by clicking the Comments button in the bottom left corner of PDF Studio. From this panel, you can view, search, and modify all the comments in the document.

Note: *The comments button will not be displayed in the bottom left corner of PDF Studio unless there are comments that exist in the document.*


Comments Panel Navigation


The mouse is primarily used to navigate the comments panel. Clicking on any of the annotations listed will navigate the document to where the annotation is located on the page and select the current annotation. The following keyboard shortcuts can be used as well to navigate the comments panel.


- Arrow Keys - Up and Down can be used to navigate up and down the annotation list
- Spacebar - Highlight an annotation and press space bar to toggle the check box.
- Enter - Press Enter on a selected annotation to open the Note popup, then type the note you wish to add. Once complete press Esc to close the popup.

Comments Panel Toolbar


The following options are available at the top of the comments panel.

 **Expand:** Expands the comment tree to show all pages and review markups

 **Collapse:** Collapses the tree to only show the page folders

 **Options:** Additional options for the comments tree

- Export: Export comments into a separate file. The same as [Exporting Comments](#) from the menu
- Print: Allows you to print the comments in the tree
 - Text: Prints just a simple text tree with all comments
 - Tree: Prints the entire tree exactly as it is displayed in the Comments Panel

 **Delete:** Deletes the selected comment

✓ **Mark with Check Mark:** Marks the selected annotation with a check mark. See [Setting Status or Check Marks](#)

Review: Marks the selected annotation with a review status. See [Setting Status or Check Marks](#)

Find: Enter text and press Enter to search for the text within the annotations

◀ **Previous Search Result:** Goes to the previous search result

▶ **Next Search Result:** Goes to the next search result

Hide All Comments: When checked will hide all the comments from being displayed

My Comments Toolchest

PDF Studio stores frequently used comments and annotations so that they can be used again later with just a single click.

[Saved Comments:](#) Stores any comments that have been saved by the user to be used again later.

[Recent Comments:](#) Stores the last 30 comments used.

Showing the Toolchest

To show the My Comments list, from the menu select **View -> Tabs -> My Comments**, or using the shortcut key Ctrl + Shift + T (Command + Shift + T on Mac).

Saved Comments

Saved comments and annotations can be found in the Saved Comments section of the [My Comments Toolchest](#).

Creating Saved Comments

To save an annotation, right-click (Mac: Ctrl+click) on it to show the context menu and select Add to My Comments from the menu.

Using Saved Comments

To add a saved annotation to a document, click the annotation in Saved Comments, and then click the location on the document to place the annotation. Once placed the annotation can be edited as normal.

Managing Saved Comments

Saved comments can be reordered, deleted, or resized.

- To reorder, select one or more comments and drag to the desired location.
- To delete, select one or more comments and press Delete, or right-click and select Remove.
- To resize, select the down arrow ▼ next to My Comments and choose Small, Medium (default), or Large.

Recent Comments

Recently used annotations are listed in the Recent Comments section of the [My Comments Toolchest](#). Annotations that are added to a document or modified on a document will automatically be added to this list. This list keeps the 30 most recently used annotations.

Saving Recent Comments

To permanently keep an item from the Recent Comments list, right-click (Mac: Ctrl+click) the annotation in the Recent Comments list and select Save Comment from the context menu.

Using Saved Comments

To add a Recent annotation to a document, click the annotation in Recent Comments, and then click the location on the document to place the annotation. Once placed the annotation can be edited as normal.

Managing Recent Comments

Recent comments can be reordered, deleted, or resized.

- To reorder, select one or more comments and drag to the desired location.
- To delete, select one or more comments and press Delete, or right-click and select Remove.
- To resize, select the down arrow ▼ next to My Comments and choose Small, Medium (default), or Large.

Importing and Exporting Annotations

Annotations can be imported into or exported from a PDF document.

[Exporting Comments](#): Exports annotations from the current document

[Importing Comments](#): Imports annotations into the existing document

Importing Annotations

Comments can be imported from either an FDF or XFDF file into the current document. Comments from [Text Annotations](#), [Graphics Annotations](#), and Sound Annotations will be imported. When imported the comments will show up in the exact same location on the page as when they were exported.

Comments can be imported using the following formats

FDF: File format created by Adobe that is supported by most PDF applications

XFDF: Extended FDF file format created by Adobe that is supported by most PDF applications

How to Export Annotations

1. From the menu, choose **Comments > Import Comments**
2. Select whether to import an FDF or XFDF file. This will display a file chooser dialog.
3. Navigate to the location of the FDF or XFDF file and then click Open

Exporting Annotations

Comments can be exported from the current document into a file in FDF, XFDF, .txt. or XML format. Comments from [Text Annotations](#), [Graphics Annotations](#), and Sound Annotations will be exported. Hyperlinks are not considered comments in PDF format and thus are not exported.

Comments can be exported in the following formats

FDF: File format created by Adobe that is supported by most PDF applications

XFDF: Extended FDF file format created by Adobe that is supported by most PDF applications

Text: Simple text file (.txt) that will contain all of the annotation information

XML: File format that is similar to an Excel file that will contain all of the annotation information

How to Export Annotations

1. From the menu, choose **Comments > Export Comments**
2. Select whether to export in FDF, XFDF, Text, or XML format. This will display a save dialog.
3. Select the location and name of the file to export to and click Save

Editing and Manipulating PDFs

PDF Studio comes with advanced tools to edit and manipulate PDF documents including content editing, redaction, modifying and splitting pages, and creating bookmarks, headers, footers, and watermarks.

[Content Editing](#): Edit text, images, and content within the PDF

[Redaction](#): Securely redact text and images from the PDF

[Modifying PDF Pages](#): Edit pages including, cropping, appending, inserting, extracting, deleting, and more

[Splitting PDF Documents](#): Split PDF documents by number of pages, bookmarks, blank page, text, and more

[Optimizing PDFs](#): Reduce the file size of the PDF by optimizing specific parts of the PDF

[Bookmarks](#): Create, edit, and delete bookmarks

[Headers and Footers](#): Create, edit, and delete headers and footers

[Watermarks](#): Create, edit, and delete watermarks

[OCR PDF](#): Recognize text on scanned images

Content Editing

The Content Editing tool allows you to edit existing content within a PDF. You can change the characteristics of text or content as well as move and delete image content as well.

Note: *Annotations are not a part of the PDF content and so these cannot be edited by the Content Editing tool. To edit annotations see [Editing Annotations](#).*

Content that can be edited:



Only specific types of PDF content can be edited. Follow the links below on how to edit each type of content.

[Text Content](#): Edit text contained within the PDF

[Image Content](#): Edit images contained within the PDF

[Path Content](#): Edit other objects which include lines and shapes within the PDF

Using the Content Editing Tool


1. Activate the tool by clicking on the Edit Content button , going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
2. Then click or drag an area with the mouse to select the desired content. Once selected, content can be moved, edited, or deleted.
3. To exit the selection mode, simply click on the hand tool  or Esc on the keyboard.


Editing Text Content

The Content editing tool is capable of editing text that is a part of the PDF. Text can be moved, edited, deleted, or redacted using the content editing tool.

Note: *Not all text displayed in a PDF is considered text content. In some cases the text may actually be an image or even path objects. Text content that is either a path or image will not function the same and have limited editing abilities.*

How to Move or Edit Text Content

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple pieces of text will let you update the properties for all pieces at once, but you will not be able to modify the text as a group.*
2. Move or Edit the text by doing the following
 - **Move:** Click on the text and drag it to its new location on the page.

- **Edit:** To access the Text properties, right click (Mac: Ctrl + Click) and choose Properties in the mouse menu or double click on the selected text.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Text Content Properties

Text Content contains the following property settings:

Font – choose a new font for the selected text from the list

Note: *When choosing a font only fonts that are embedded in the document can be selected. In addition, if the font is subsetting not all of the font characters may be available and may show up as either an incorrect or missing character when editing the text.*

Text Color – change the color of the text

Outline Color – add or adjust the outline of the text

Text Size – edit the font size

Outline Width – increase or decrease the width of the outline

Character Spacing – increase the space between each letter


Horizontal Scaling – increase or decrease the spacing between each letter


Word Spacing – increase the space between each word

Baseline Offset – move line of text above or below the surrounding text; create super- or sub-scripts

Text – change the wording of the text

How to Remove Text

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple pieces of text will let you remove multiple text content at once.*
2. Delete or Redact text by doing the following

- **Delete/Cut:** Delete the Text by pressing the Del key or right-click on the text (CTRL + Click on Mac) and choose Remove -> "Delete/Cut" in the context menu.
 - **Redact:** Redact the Text by right-click on the text (CTRL + Click on Mac) and choose Remove -> "Redact" in the context menu.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Delete/Cut

Delete/cut will remove the text from the document and add it your clipboard; Using Ctrl+V (Mac: Cmd+V) or by right clicking (Mac: Ctrl + Click) and selecting paste will add the text back to its original position.

Redact


The Redact option in Content editing functions exactly the same as using the [PDF Redaction](#) and will completely remove the selected text and replace it with a black bar.


Editing Image Content

The Content editing tool is capable of editing images that are a part of the PDF. Images can be moved, deleted, or redacted using the content editing tool. Images from within the PDF can also be saved directly to your computer by using Save As which will allow you to choose a location to save the image to.

Note: *Not all images displayed in a PDF are actually image content. In some cases the images may actually be many path objects combined together to form an image. Image content that is a path will not function the same and have limited editing abilities.*

How to Move Image Content

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple images will let you move all the images at once.*
2. Click on the image and drag it to its new location on the page.

- **Image Properties:** Image properties can be VIEWED ONLY by right clicking (Mac: Ctrl + Click) and choosing Properties in the mouse menu or double click on the selected image.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Text Content Properties

Image Content contains the following property settings:

Color space: displays the color format details of the image



Compression type: displays the image compression format used for the image

DPI Resolution: displays the DPI (dots per inch) of the image

Dimensions: the dimensions of the image in pixels

Size: the file size of just the selected image

How to Remove Images

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple images will let you remove all the images at once.*
2. Delete or Redact the image by doing the following
 - **Delete/Cut:** Delete the image by pressing the Del key or right-click on the image (CTRL + Click on Mac) and choose Remove -> "Delete/Cut" in the context menu.
 - **Redact:** Redact the image by right-click on the image (CTRL + Click on Mac) and choose Remove -> "Redact" in the context menu.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard



Delete/Cut

Delete/cut will remove the image from the document and add it your clipboard; Using Ctrl+V (Mac: Cmd+V) or by right clicking (Mac: Ctrl + Click) and selecting paste will add the text back to its original position.

Redact

The Redact option in Content editing functions exactly the same as using the [PDF Redaction](#) and will completely remove the selected image and replace it with a black shape.



How to Save Images

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
2. Select the image you wish to save to your computer and right-click (CTRL + Click on Mac) on the image and choose Save As.
 - **Note:** *Only 1 image can be saved at a time.*
3. Select the location on your computer where you would like to save the image, choose a file name and an image format then click Save.
4. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Editing Path Content

Path content is any content that is not either a text or an image. Paths can be used to create anything from shapes and dividers to even text and images. The Content editing tool is capable of editing paths that are a part of the PDF. Paths can be moved, edited, or deleted using the content editing tool.

How to Move Path Content

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple Paths will let you edit all the Paths at once.*
2. Move or Edit the Path by doing the following
 - **Move:** Click on the Path and drag it to its new location on the page.
 - **Edit:** To access the Path properties, right click (Mac: Ctrl + Click) and choose Properties in the mouse menu or double click on the selected Path.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Path Content Properties



Path Content contain the following property settings:

Fill Color: the fill color of the path

Stroke Color: the border color of the path

Border Width: the width of the border line of the path

How to Remove Paths

1. Select the Content Editing tool by clicking the  on the toolbar, going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
 - **Note:** *Selecting multiple Paths will let you move all the Paths at once.*
2. Delete the Path by pressing the Del key or right-click on the Path (CTRL + Click on Mac) and choose Remove -> "Delete/Cut" in the context Path menu.
3. Once complete, to exit Content Editing mode, simply click on the hand tool  or Esc on the keyboard

Delete/Cut

Delete/cut will remove the Path from the document and add it your clipboard; Using Ctrl+V (Mac: Cmd+V) or by right clicking (Mac: Ctrl + Click) and selecting paste will add the Path back to its original position.

Redaction

The Redaction tool completely removes all traces of the redacted content from the document. Not only does it remove text but it is also capable of redacting partial and entire images.

What is Redaction?

PDF Redaction is when you remove any information from a document prior to publication or distribution. This is often necessary when you have confidential or private information that you do not want others to see or have access to but still want to make part of the document available. The most common example of this is a black rectangle covering portions of text.

It's **EXTREMELY** important that when redacting text/objects from a document that it is done properly. Not all redactions are the same and if done incorrectly an individual can still retrieve the information. Take for example the text below, it appears that part of the text has been redacted and you don't know what it is.



My bank account number is **123456789** and routing number is **654987**.

If you use your cursor to highlight the above text you be able to easily see the text. Just covering the text with a black opaque highlight appears to have hidden the words but in reality the information is still there. Anyone can just copy and paste the information into any other document. The same also applies to attempting to cover up text with a Black Square Annotation. The text still exists beneath the annotation and can easily be accessed by deleting the annotation or extracting text.

Redaction Steps:



1. [Redaction Annotations](#): Adds redaction annotations to the document that offer a preview of what the document will look like after redaction, and also allows you to adjust [Redaction Properties](#) before being applied.
2. [Applying Redactions](#): This "burns in" the annotations and removes any text, image, or drawing from the document that is underneath the annotation's area.

Starting the Redaction Tool

1. Activate the tool by clicking on the Redaction Tool button , going to **Edit -> Redact -> Mark for Redaction**, or using the shortcut key Ctrl + Shift + Y (Command + Shift + Y on Mac),
2. Then click or drag an area with the mouse to select the desired area you wish to redact.
3. Once selected right click (Mac: Ctrl + Click) and choose Apply All Redactions in the mouse menu or go to **Edit -> Redact -> Apply All Redactions**.
4. To exit the selection mode, simply click on the hand tool  or Esc on the keyboard.

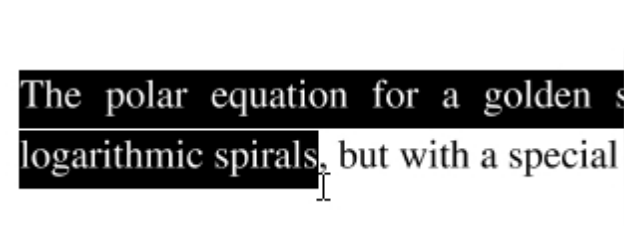
Redaction Annotations

The first step of redaction is to Add Redaction Annotations. Adding redaction annotations to the document provides a preview of what the document will look like after redaction, and also allows you to adjust redaction properties before being applied.

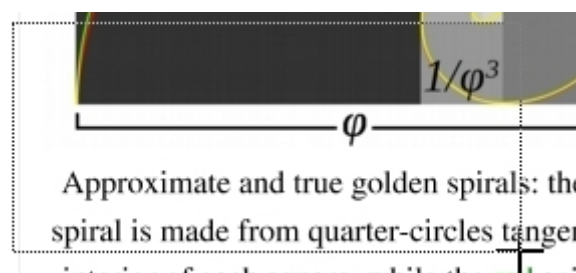
1. Activate the tool by clicking on the Redaction Tool button , going to **Edit -> Redact -> Mark for Redaction**, or using the shortcut key Ctrl + Shift + Y (Command + Shift + Y on Mac)
2. Then click or drag an area with the mouse to select the desired area you wish to redact.
3. Once selected right click (Mac: Ctrl + Click) and choose Apply All Redactions in the mouse menu or go to **Edit -> Redact -> Apply All Redactions**.
4. To exit the selection mode, simply click on the hand tool  or Esc on the keyboard.

Note: When the mouse pointer is a cursor, you can select text to be redacted. When the pointer is a plus sign, you can drag a rectangle to encompass sections of images, drawings, and text in the area.

Cursor selection




Rectangle selection




How to Create Redaction Annotations

You can securely redact PDF Documents in PDF Studio by following the directions below. It's important that you complete all the steps listed below in order to ensure your document is properly redacted. The Redaction tool only removes PDF Content.

Redacting Text


1. Activate the tool by clicking on the Redaction Tool button , going to **Edit -> Redact -> Mark for Redaction**, or using the shortcut key Ctrl + Shift + Y (Command + Shift + Y on Mac),
2. Begin marking the content that you wish to be redacted. This can be done in 3 different ways:
 - **Text:** Text can be marked for redaction by using the cursor to highlight the text you wish to be redacted.
 - **Other Objects/Images:** Other objects that cannot be selected (for example: images, scanned text, paths) can be marked for redaction by using Ctrl + Click (Command + Click on Mac) and dragging to create a box over the content you would like redacted.

- **Alternate Selection Method:** Double click on a word or image to highlight just that word or image for redaction.
- 3. Each of the items that you mark for redaction will show a transparent black box with a red outline. **IMPORTANT:** The text has not yet been redacted. These marks are just there as an indication of what will be redacted and allows you to verify what will be removed prior to redaction.
- 4. ****EXTREMELY IMPORTANT**** Once you have completed marking all of your items for redaction you then need to actually redact the content from the document. You can do so by going to **Edit -> Redact -> Apply All Redactions** or right clicking (CTRL + Click on Mac) on any marked redaction and selecting Apply All Redactions.
- 5. Once complete, to exit the Redaction Tool, simply click on the hand tool  or Esc on the keyboard

Redaction Properties

When redacting content from within the PDF there are a variety of options that can be set. These options can apply to either the redaction annotation or the redaction once applied.

Redaction Annotation Properties

To access the Redaction Annotation properties right click (Mac: Ctrl + Click) on the redaction annotation and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). Redaction Annotations contain the following property settings.

Appearance

Annotation

Outline Color - Sets the color of the border for only the redaction annotation

Fill Color - Sets the fill color for only the redaction annotation

Transparency - Sets the transparency of the shape for only the redaction annotation

Redaction

Fill Color - Sets the fill color of the redaction once it is applied

Note: *Selecting the No Color option erases the content and will not place any square where the content used to be once the redaction has been applied.*

Text - This will apply text on top of the redaction square once applied

Font - The font of the text placed on top of the redaction

Font Size - The font size of the text placed on top of the redaction

Font Color - The color of the text placed on top of the redaction

Alignment - The alignment of the text placed on top of the redaction

Repeat Text - Weather or not to continuously repeat the text placed on top of the redaction

Note / Comment - A note can be added to shapes that will be displayed when hovered over by the mouse

Save as default - When checked this will make the selected appearance settings the default for any new Redaction annotations going forward

General

Author - Allows you to edit the author

Subject - Allows you to edit the subject

Status History


This tab will display and changes to the review status of the annotation including Author, Status, and Timestamp. For more details see [Setting Status or Check Marks on Annotations](#)

Applying Redactions

Applying the redaction is an important step to ensure that the selected content will actually be removed. This "burns in" the annotations and removes any text, image, or drawing from the document that is underneath the annotation's area.

Applying Redactions

To complete the redaction process after the [Redaction Annotations](#) have been applied, follow the steps below.

1. Go to **Edit -> Redact -> Apply All Redactions** or right clicking (CTRL + Click on Mac) on any marked redaction and selecting Apply All Redactions.
2. The document is now redacted and all of the marked items will now be solid black squares (unless a different color option was selected in [Redaction Properties](#)).
3. Make sure to save your document. If you would like to confirm that the document is in fact redacted you can confirm by following the steps listed below.
4. Once complete, to exit the Redaction Tool, simply click on the hand tool  or Esc on the keyboard


Checking if Your PDF Document is Redacted Correctly

You can check if your document was redacted correctly in PDF Studio by using the Text Selection, Text Search, and Content Editor tool to see if you can select any of the content that you were trying to redact.


Using the Text Selection Tool

1. Open the Redacted PDF Document you wish to check
2. Using the [Text Selection](#) Tool highlight the line of text that contains the redacted words
3. Copy the highlighted text to your clipboard by using the shortcut keys CTRL + C (Command + C on a Mac)
4. Open up any text editor (Word, Notepad, Text Edit, etc...)
5. Paste the text you highlighted using CTRL + V (Command + V on a Mac)
6. If you redacted correctly then only the non redacted text should be displayed. If you see the text you were trying to remove than it was not done correctly.

Using the Text Search Tool

1. Open the Redacted PDF Document you wish to check
2. Open the [Text Search](#) Tool by clicking on the Text Search button  on the toolbar, pressing Ctrl-F (Cmd + F on Mac), or choosing **Edit > Search Text** from the menu.
3. Type in the word you redacted and click on New Search
4. This will bring up a list of all the text matching what you typed in the search box. Once the results appear you can click on each of the results to see where in the document that text is located.
5. If you redacted correctly then only the non redacted text should be displayed and highlighted in the search results. If you see the text you were trying to remove than it was not done correctly.

Using the Content Editor

1. Open the Redacted PDF Document you wish to check
2. Start the [Content Edit](#) tool by clicking on the Edit Content button , going to **Edit -> Edit Content**, or using the shortcut key Ctrl + Shift + E (Command + Shift + E on Mac)
3. Select any of the redaction boxes on your document by clicking on it and then either move or delete the box.
4. If you redacted correctly then nothing should remain under where the redaction box was. If you see the text you were trying to remove than it was not done correctly.

Note: *When redacting part or all of an image sometimes the redaction square will become a part of the image and you will not be able to move or delete the actual square. During the redaction process if an image does not have a transparency value the removed data will just be converted to a solid black color. As long as the black square is now a part of the image and moves with the image it is properly redacted.*

Modifying PDF Pages

PDF Studio has the following options available to modify pages within a PDF document.

[Cropping Pages](#) - Crop pages within the PDF Document

[Appending Document](#) – Append another PDF document to the current one.

[Inserting Pages](#) – Insert pages from another PDF document into the current one.

[Extracting Pages](#) – Extract pages from the current document into a new document.

[Replacing Pages](#) – Replace pages from the current document with pages from another document.

[Deleting Pages](#) – Delete pages from the current document.

[Rotating Pages](#) – Rotate pages in the current document.

[Reversing Pages](#) – Reverse the page order in the current document.

[Cut, Copy, and Paste Pages](#) - Cut/Copy and Paste pages within a document or across documents.

[Importing Images as Pages](#) - Takes a selected image and inserts the image as a page within the PDF

Cropping Pages


PDF Studio can adjust the crop box, bleed box, trim box, and art box on PDF documents. Documents may be cropped using the cropping dialog or the cropping tool. Units can be specified in inches, points, centimeters or millimeters. Cropping can be applied to a single page, a range of pages, or all pages.

How to Crop Pages

Using the Dialog

1. Go to **Document -> Crop Pages -> Box Margins** or use the shortcut key Ctrl + Shift + C (Command + Shift + C on Mac)
2. Type in the crop settings and values for the document
3. Click OK to apply the settings

Using Drag & Crop

1. Activate the Crop tool by clicking on the Crop Tool button  or going to **Document -> Crop Pages -> Drag & Crop**
2. Then click and drag an area on the page with the mouse to select the desired area you wish keep.
3. When the mouse button is released, the page crop margins will appear and the crop dialog will open so that the crop values can be manually adjusted.
4. Click OK to apply the settings

Crop Settings

Box

Crop box – the region to which the contents of the page are to be or cropped when displayed or printed.

Bleed box – the bounds to which the contents of the page should be clipped when output in a production environment.

Trim box – the intended dimensions of the finished page after trimming.

Art box – the extent of the page's meaningful content (including potential white space) as intended by the document creator.

Margins

Units - Select the measurement unit for the crop margins in either Inches, Points, Centimeters, or Millimeters

Top - The distance of the margin from the top

Bottom - The distance of the margin from the bottom

Left - The distance of the margin from the left

Right - The distance of the margin from the right

Pages

Page Range - The range of pages to be cropped

- All Pages: all pages in the document
- Page Range: set the pages to be cropped using the From and To options
- Even Pages Only: only crops the even pages
- Odd Pages Only: only crops the odd pages

Appending Documents

PDF Studio can append other PDF documents to the end of a PDF. This is useful when combining multiple PDFs into a single document. Documents can also be appended by dragging files directly onto the Thumbnail Pane directly.

Using the Menu

Select **Document -> Append Document** from the menu and choose a document to insert at the end of the current document.

Using Drag & Drop

Use the mouse to select thumbnail page(s) from the thumbnail pane and then:

- Copy - Select and drag thumbnail pages from the source document to the destination document's Thumbnail pane of the second document.
- Move - Select thumbnail pages from the source document. While holding Ctrl, drag the pages to the desired location within the Thumbnail Pane of the second document.

Inserting Pages

PDF Studio can insert other PDF documents to a location you specify within the PDF. This is useful when combining multiple PDFs into a single document and the document's pages need to be inserted at a specific location. You can also insert pages from another PDF document by opening it and dragging the thumbnails of the desired pages into the current document.

Using the Menu

Select **Document > Insert Pages From PDF** from the menu and choose a document to insert into the current document.

Insert Page Options

Insert At - Where to insert the pages from the chosen document

- End of the Document: Inserts the pages at the end of the document
- Beginning of the Document: Inserts the pages at the beginning of the document
- After page: Inserts the pages after the specified page number
- Interleave: This option can be used to insert them at every other page. This is especially useful on two-sided documents.

Source Pages - The pages from the chosen document that will be inserted in the PDF

- All Pages: all pages in the document
- Page Range: set the pages to be inserted using the From and To options
- Even Pages Only: only the even pages
- Odd Pages Only: only the odd pages

Using Drag & Drop

Use the mouse to select thumbnail page(s) from the thumbnail pane and then:

- Copy - Select and drag thumbnail pages from the source document to the destination document's Thumbnail pane of the second document.
- Move - Select thumbnail pages from the source document. While holding Ctrl, drag the pages to the desired location within the Thumbnail Pane of the second document.

Extracting Pages

PDF Studio can extract pages from a PDF to a new PDF. This is useful if you need to separate a section of a PDF into a separate document. You can also extract pages by selecting the thumbnails of the desired pages you wish to extract and then dragging the selected pages outside of PDF Studio and into a folder or on your desktop.

Using the Menu

Select **Document > Extract Pages** from the menu to extract pages from the current document into a new one.

Extract Page Options

Page Range - The range of pages to be extracted

- All Pages: all pages in the document
- Page Range: set the pages to be extracted using the From and To options
- Even Pages Only: only the even pages
- Odd Pages Only: only the odd pages

Using Drag & Drop

Use the mouse to select thumbnail page(s) from the thumbnail pane and then:

- Copy - Select and drag thumbnail pages from the document to a folder or on your desktop.
- Move - Select thumbnail pages from the source document. While holding Ctrl, drag the pages to a folder or on your desktop.

Replacing Pages

PDF Studio can replace pages from a PDF using pages from another PDF. This is useful if you need to substitute pages in an existing document with pages from another document.

Using the Menu

Select **Document > Replace Pages** from the menu and choose a document to replace pages with. Then choose the page range in the current document to replace with the page range in the selected document.

Replacing Page Options

- **Replace Pages:** The pages in the currently opened document that will be replaced
- **With Pages:** The pages of the new document to replace the pages of the current document

Deleting Pages

PDF Studio can delete pages from within a PDF document. This can be done using either the menu or the thumbnail pane.

Using the Menu

Select **Document > Delete Pages** from the menu to delete pages from the current document.

Deleting Page Options

Page Range - The range of pages to be deleted

- **All Pages:** all pages in the document
- **Page Range:** set the pages to be deleted using the From and To options
- **Even Pages Only:** only the even pages
- **Odd Pages Only:** only the odd pages

Using the Page Thumbnails

In the page thumbnails pane select either a single or group of the pages you wish to delete then:

- Press the Del key on the keyboard
- Right click (Mac: Ctrl+Click) on any of the selected pages and then click "Delete Pages"

Rotating Pages

PDF Studio can rotate multiple pages of a document at once. This is useful if the document was scanned upside down or is currently being displayed in the wrong direction. Pages can only be rotated in 90 degree increments.

Note: Rotating Pages is different then [Rotating Page View](#) in that it is not temporary and the changes made using this tool will permanently rotate the pages within the document when saved.

Using the Menu

Select **Document > Rotate Pages** from the menu or use the shortcut key Ctrl + Shift + R (Command + Shift + R on Mac) to rotate pages in the current document. Save the document to save the rotation of the pages

Rotating Page Options

Direction - The direction and amount to rotate the pages

- Clockwise 90 degrees: Rotates the pages 90 degrees (1/4 turn) to the right
- 180 degrees: rotates the pages 180 degrees
- Counterclockwise 90 degrees: Rotates the pages 90 degrees (1/4 turn) to the left

Page Range - The range of pages to be rotated

- All Pages: all pages in the document
- Page Range: set the pages to be rotated using the From and To options
- Even Pages Only: only the even pages
- Odd Pages Only: only the odd pages

Using the Page Thumbnails

In the page thumbnails pane select either a single or group of the pages you wish to rotate

Right click (Mac: Ctrl+Click) on any of the selected pages and then highlight "Rotate Pages". You will have the following 3 options available

- Clockwise 90 degrees: Rotates the pages 90 degrees (1/4 turn) to the right
- 180 degrees: rotates the pages 180 degrees
- Counterclockwise 90 degrees: Rotates the pages 90 degrees (1/4 turn) to the left

Click on the option you want to rotate the selected pages

Note: This will update the rotation property for the pages rotated in the document itself and the rotation will be saved when the document is saved. To rotate pages temporarily in the current view only, use the Rotate Clockwise and Rotate Counterclockwise buttons on the [Toolbar](#) or in the View menu.

Reversing Pages

PDF Studio can automatically reverse the order of the pages within a PDF. This can be done from the menu and is useful for example if a document was scanned in reverse.

Using the Menu

Select **Document > Reverse Pages** from the menu to reverse the page order in the current document.

Move, Cut, Copy, & Paste Pages

You can use the page thumbnails in the thumbnails pane to copy or move pages within a document or between different documents.

When you drag a page thumbnail in the page thumbnails pane, a bar appears between other page thumbnails, indicating the position in which the page will be moved to.

Within a PDF, using the Page Thumbnails

Use the mouse to select thumbnail page(s) from the thumbnail pane and then:

Using Drag and Drop

- Move - Select and drag thumbnail pages to the desired location within the Thumbnail Pane.

Using Right Click (Mac: Ctrl+Click)

- Copy - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to copy the selected pages.
- Move - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to cut the selected pages.
- Paste - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to paste the copied or cut pages in the same document.

Between PDFs, Using the Page Thumbnails

Use the mouse to select thumbnail page(s) from the thumbnail pane and then:

Using Drag and Drop

- Copy - Select and drag thumbnail pages from the source document to the destination document's Thumbnail pane of the second document.
- Move - Select thumbnail pages from the source document. While holding Ctrl, drag the pages to the desired location within the Thumbnail Pane of the second document.

Using Right Click (Mac: Ctrl+Click)

- Copy - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to copy the selected pages.
- Move - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to cut the selected pages.
- Paste - Right click (Mac: Ctrl+Click) or use keyboard shortcuts to paste the copied or cut pages in the same document.

Import Images as Pages

PDF Studio can import an image directly into the PDF as a page. This can be useful when adding scanned pages or charts to a document for example. The following image types can be imported: *.png, *.jpg, *.jpeg, *.jpe, *.gif, *.tif & *.tiff.

Using the Menu

1. Select **Images > Import Images as Pages** from the menu and choose an image to insert into the current document.
2. Using Add Files or Add Folder select the files you wish to insert as pages.
3. Once all of the files are added click Start to begin merging/converting the files.
4. All images will be converted in a single action and appended to the end of the document.

Using Drag & Drop

Use the mouse to select the image(s) from a folder or your desktop and then drag them directly into the thumbnail pane of the document to have them converted into a page.

Splitting PDF Documents

PDF Studio has the following options available when splitting a PDF document.

[Splitting a PDF](#): How to split PDF documents

[Split PDF Options](#): Options available when splitting PDF documents

[Split PDF Profiles](#): Using and managing existing PDF split profiles

Splitting a PDF

PDF Studio can split PDF documents in a variety of ways. The available split options are listed below:

- **Equal Size Documents**: Splits the document into equal number of pages
- **Page Ranges**: Splits the document by a set of defined page ranges
- **By Blank Page**: Splits the documents by blank page
- **By Bookmarks**: Splits the document by bookmarks
- **Before Text**: Splits the document before specified text
- **After Text**: Splits the document after specified text

How to Split a PDF

1. Open the document that you would like to split.
 - **Note:** *This is not a required step if you only wish to create a split profile without applying it immediately.*
2. Select **Document > Split Document** from the menu.
3. Fill in the desired [Split PDF Options](#) for the current split configuration. A name for a [Split PDF Profile](#) can also be set during this step to save the settings to be reused later.
 - **Note:** *You do not need to create or save a split configuration before splitting a document. To save the current split configuration, click on the Save button and enter a name.*
4. To split the current document, click on Apply

Split PDF Options

Below are the options available when splitting a PDF document into multiple documents:

Settings

The available settings are broken into sections based on the settings available within the dialog.

General

Options associated with the current split profile.

Name

Name of the split profile (if created).

To create a new profile select "<new profile>" and click Save. Then enter a name for the new profile

Show on Menu

Whether to show this split configuration on the Split PDF menu for faster access.

Split Method

Use this section to tell PDF Studio how to split the document into multiple documents. The available options in this section are:

Split into equal size documents of

Use this method to split the document into equal size documents of a given number of pages. Enter the page count in the text field.

Split by page range (1,3-5;7-10)

Use this method to split the document into multiple documents based on page range. Enter the page range in the text field. Dash is used for a page range, comma to separate pages within the

same document, semicolon to separate documents. So for instance, 1, 3-5; 7-10 will output two documents, the first document with pages 1, 3, 4, and 5, and the second document with pages 7, 8, 9, and 10.

Split by blank page

Use this method to split the document when a white page is encountered. The white page will be used as a separator between documents and will be discarded. There are two methods of detecting white pages:

Standard - will split the documents by blank pages that contain no content.

Note: *If the page was created from a scanned document the page may appear blank but will actually contain a solid white image and so the page is not viewed as blank.*

Analyze Pages - Checking this option will analyze each individual page to determine how much of the page is actually blank in comparison to others. Adjust the tolerance settings if needed to improve results.

Tolerance - This value increases the tolerance for artifacts on the page. Increase this value if the blank pages contain marks such as scan lines or fold lines to get better results.

Split by bookmarks at level

Use this method to split the document based on bookmarks at level 1. You can also choose to split up to a higher level, for instance up to level 3. In this case, the document will be split at bookmark level 1, level 2, and level 3. In this method, we assume that the bookmarks contain Go To Page actions within the PDF document itself and that the bookmarks have been created in ascending page order.

Split before text

Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the first page of the next document.

Split after text

Use this method to split the document when specific text in the document is encountered. When the text is encountered in a page, this page will become the last page of the document and the following page will become the first page of the next document.

Save Files To

This section is about the output PDF files (the PDF documents obtained by splitting the incoming document)

File Name Pattern

This section is to determine the pattern of the output files.

Use Source filename

When this option is selected, the original filename for the current PDF document (the document that is being split) will be used to name the output files.

Append

For each output PDF file, you can choose to append the page range or an incremental counter starting at any given number. PDF Studio will start with the original PDF file name (note that the original PDF file name can first be altered using the Change the PDF File Name section below).

- **Page Range:** When the Page Range option is chosen, PDF Studio will append a string containing the page range (for instance, test_p4-p6.pdf). When Split by Page Range method was selected, the page range formula will be appended as a string (for instance, the page range formula 1,3,5-10 will create a new file with the name test_1_3_5-10.pdf). Note that an underscore character precedes the page range formula and commas are replaced with an underscore character.
- **Starting Number At:** When this option is chosen, PDF Studio will append an incremental counter. The counter will be reset for each new incoming PDF file.
- **Current Bookmark –** This option is only available when the Split by Bookmarks method was selected. This will append the name of the starting bookmark to the output document names (for instance, if "Cover Page" is the first bookmark name, the first output document could be named test_p1-p1_CoverPage.pdf). Only letters, numbers, hyphen and underscore characters are preserved in the bookmark name to guarantee that all operating systems will accept this file name. Commas are replaced by underscores.
- **Bookmark Hierarchy:** This option is only available when the Split by Bookmarks method was selected. This will append the name of the Parent and Child bookmark names to the output document names (for instance, if "Cover Page" is the first bookmark name, the first output document could be named test_p1-p1_CoverPage.pdf). Only letters, numbers, hyphen and underscore characters are preserved in the bookmark name to guarantee that all operating systems will accept this file name. Commas are replaced by underscores.

New filename

When this option is selected, you will need to enter a new filename used for the output files. Each document name will have an incremental counter starting at zero appended to the file name entered in this field. Custom variables may also be used to further distinguish each of the file separations. The available variables are:

- \$sourcefilename - The name of the source file
- \$counter - a number starting at 1
- \$pagerange - the page range
- \$firstpage - the first page in the range
- \$lastpage - the last page in the range
- \$date - the current date

Destination Folder

This section determines the destination folder where the output PDF files will be saved.

Use Source Folder

When this option is selected, the original folder for the current PDF document (the document that is being split) will be used to save the output files.

Destination Folder

When this option is selected, you will need to enter the folder of your choice where output files should be saved. You can browse to a folder by clicking on the Browse button.

Overwrite Files

When this option is selected if a file of the same name is encountered during the split process the file will be overwritten. Otherwise, when not selected the file will have a number appended to the end.

Split PDF Profiles

Split PDF Profiles allow you to save custom split settings as templates that can be used again later to split documents. There is also an option available to "Show on Menu" and when this is

set for the profile it will be put under **Document -> Split Document** so that the profile can be run in just two clicks from the document menu.

Note: *You do not need to create or save a split configuration before splitting a document. To split documents without saving settings just go to Document -> Split Document -> Split Document and choose the settings to use and click Apply to run the split settings without saving a profile.*

Creating a Split PDF Profile

1. Select **Document > Split Document** from the menu.
2. Fill in the desired [Split PDF Options](#) for the current split configuration.
3. Set all of the options that you would like to have in your profile. You can either start from an existing profile or a blank template by selecting "<new item>" from the drop down.
4. Once you have completed your settings, click on Save. This will bring up a window to name your profile.
5. If you are starting from a blank template this field will be blank. If you started from a previous profile the previous profiles name will be displayed. If you would like to just update the previous profile leave the name and click OK. If you would like to create a new profile just type in the new name you would like to save it as and click OK.
6. Once complete your profile will now be available in the drop down menu as well as the quick options in the menu bar

Split a PDF Document Using an Existing Split Profile

There are 2 ways to apply an existing split profile:

From the Split dialog

Open the document that you would like to split. Open the Split dialog from **Document -> Split Document -> Split Document**. Choose the split profile from the drop down list in the combo box, click on the Apply button at the bottom of the dialog.

From the Split Document menu

Open the document that you would like to split. Under the **Document -> Split Document** menu, there is a list of all the split profiles that you have previously created.

Note: *Only the ones for which you chose the Show on Menu option will appear on this list. Click on the split profile in the list you'd like to run and it will begin immediately using the settings saved in the split profile.*

Optimizing PDFs

PDF Studio has the following functions available when optimizing PDF documents.

[Optimizing a PDF](#): How to optimize a PDF using Optimizer in PDF Studio

[Optimizer Settings](#): Options available when optimizing PDF documents

[Optimizer Profiles](#): Using and managing existing PDF optimizer profiles

Optimizing a PDF

PDF Studio is capable of optimizing PDF documents. Optimizing a PDF document is useful if you need to compress images or remove objects in order to reduce the PDF file size. There are many different optimization options available in PDF Studio.

How to Optimize a PDF document

1. On the menu bar select **Document -> Optimizer -> Optimize** or use the shortcut key Ctrl + Shift + O (Command + Shift + O on Mac)
2. This will display the [Optimizer Settings](#) dialog
3. Select an [Optimizer Profile](#) or the settings that you wish to use to optimize your document
4. Once complete click on Optimize. This will prompt you for a location to save the document
 - **Note:** *If the document is protected or locked you will not be able to optimize the document until it is unlocked.*
5. Once you have set the save location for your document and click save and your document will be optimized and saved to the location you chose.
6. After optimization is complete the new file will automatically be opened so that you can review the results

Optimizer Settings

Below is a list of each of the PDF optimizer settings and a description of their functions.

PDF Optimize Options:

Profile

PDF Studio comes with 3 default profiles for optimizing PDFs that generally cover most scenarios. Users can create custom [Optimizer Profiles](#) to fit their specific needs that can be saved and reused later without having to re-enter settings.

Defaults Profiles Included:

- Light - light compression maintaining higher quality images
- Balanced - compression suitable for most standard needs
- Aggressive - high compression while sacrificing image quality

Image Processing

PDF Studio can process images contained within the document using a variety of settings:

Image Compression	<p>Convert any image to either a JPEG, JPEG2000, FLATE, or JBIG2.</p> <ul style="list-style-type: none">• JPEG - lossy compression that will reduce image quality and size• JPEG2000 - less lossy compression that will reduce size and some quality• FLATE - Lossless compression does not reduce quality but may not always reduce file size• JBIG2 - Lossless compression that can only support black and white color space. Color images will be converted to black and white. Best for scanned documents with no images
Image Quality	<p>Allows the image quality to be adjusted between 10-100%.</p> <ul style="list-style-type: none">• This will only affect JPEG or JPEG2000 images as these are

	the only formats that support image quality settings.
Image Color Space	<p>Choose to either retain or convert the image colors to Grayscale or B&W.</p> <ul style="list-style-type: none"> • Grayscale - Only supported with JPEG, JPEG2000, or FLATE. Best for full color images • B&W - Only supported by FLATE or JBIG2. Best for scanned documents with no images <p>Note: When the retain option is selected CMYK images will be converted to RGB due to a regression bug in Java 1.7.</p>
DPI (Dots per Inch) Resolution	<p>Adjust the image resolution of all images that are larger than the option selected</p> <ul style="list-style-type: none"> • Preset options include retain, 50, 100, 150, 200, 300, & 600 DPI • Custom option allows user to set any value between 50-1200 DPI

Object Removal

PDF Studio can remove the following objects from within a PDF:

Alternate Images	Removes alternate embedded image dictionaries that are used for high resolution printing to reduce file size. Only visible images displayed on the PDF while viewing will be kept in the document.
Bookmarks	Removes all bookmarks from the PDF document
Document Info	<p>Removes any document information located in the document properties (Document->Document Properties) that would include the following:</p> <ul style="list-style-type: none"> • Title

	<ul style="list-style-type: none">• Author• Subject• Keywords• Producer
JavaScript Actions	This will remove all JavaScript actions from the PDF document but retain any objects that may have had JavaScript actions such as form fields, push buttons, etc...
Embedded Thumbnails	Removes page thumbnails that are stored in the PDF document. Once removed the page thumbnails will just be rendered each time the document is loaded.
Comments	Removes all annotations and comments from the PDF document
Links	Removes all links from the PDF document
Attachments	Removes any attachments that are stored within the document
Form Fields	Removes all form fields that are on the PDF document
Metadata	Removes all additional or extra Metadata from the PDF Document
Unused Resources	Removes resources that are located within the document but are never referenced by any objects in the PDF document.

Other Options

PDF Studio has the following additional options available to further compress the PDF document:

Flatten Comments	<p>Flattens all annotations including text boxes, shapes, highlights, and stamps directly onto the document so that they can no longer be edited.</p> <ul style="list-style-type: none">Annotations such as the sticky note will have comments removed but the image will still be placed on the document
Flatten Fields	<p>Flattens all fields including text boxes, check boxes, radio buttons, combo boxes, list boxes, buttons, and signature fields directly onto the document so that they can no longer be edited. All values within the fields will be flattened as well</p>
Merge Duplicate Images	<p>Merges any duplicate images within the PDF so that all objects are referencing the same image resource rather than multiple of the same resource</p>
Merge Duplicate Fonts	<p>Merges any duplicate fonts within the PDF so that all objects are referencing the same font resource rather than multiple of the same resource</p>
Compress Uncompressed Streams	<p>Compresses any additional PDF elements within the document such as page descriptions that have not been optimized by any other process to further reduce file size</p>
Clear Signatures	<p>Removes all signatures that are on the PDF Document but will leave the signature field</p>

Optimizer Profiles

To make the optimization process easier, PDF Studio allows you to create Optimizer Profiles which allow you to save your settings to use later. PDF Studio comes with 3 default profiles that you can use or you can create your own from either a blank template or by modifying one of the existing default profiles.

Note: *You do not need to create or save an optimizer configuration before optimizing a document. To optimize documents without saving settings just go to Document -> Optimizer -> Optimize and choose the settings to use and click Apply to run the optimize settings without saving a profile.*

Creating an Optimizer Profile

1. On the menu bar select **Document -> Optimizer -> Optimize** or use the shortcut key Ctrl + Shift + O (Command + Shift + O on Mac)
2. This will display the [Optimizer Settings](#) dialog
3. Set all of the options that you would like to have in your profile. You can either start from an existing profile or a blank template by selecting "<New Item>" from the drop down.
4. Once you have completed your settings, click on Save. This will bring up a window to name your profile.
5. If you are starting from a blank template this field will be blank. If you have previously used a profile the previous profile name will be displayed. If you would like to just update the previous profile leave the name and click OK. If you would like to create a new profile just type in the new name you would like to save it as and click OK.
6. Once complete your profile will now be available in the drop down menu as well as the quick optimize options in the menu bar

Optimize a PDF Document Using an Existing Optimizer Profile

There are 2 ways to use an existing optimizer profile:

From the Optimize dialog

Open the document that you would like to optimize. Open the optimizer dialog from **Document -> Optimizer -> Optimize** or use the shortcut key Ctrl + Shift + O (Command + Shift + O on Mac). Choose the optimizer profile from the drop down list in the combo box, click on the Apply button at the bottom of the dialog.

From the Optimize menu

Open the document that you would like to optimize. Under the **Document -> Optimizer** menu, there is a list of all the optimize profiles that you have previously created.

Note: *Only the ones for which you chose the Show on Menu option will appear on this list. Click on the optimizer profile in the list you'd like to run and it will begin immediately optimizing the PDF using the settings saved in the optimizer profile.*

Default Optimizer Profile Settings

Light

Light compression maintaining higher quality images

- Color Images
 - Compression = JPEG - Quality = 8
 - DPI = 600
- Grayscale Images
 - Compression = JPEG - Quality = 8
 - DPI = 600
- B&W Images
 - Compression = JBIG2
 - DPI = 600
- Object Removal
 - Alternate Images, Unused Resources, Embedded Thumbnails
- Other
 - Flate Uncompressed Streams, Merge Duplicate Images, Merge Duplicate Fonts

Balanced

Compression suitable for most standard needs

- Color Images
 - Compression = JPEG - Quality = 5
 - DPI = 150
- Grayscale Images
 - Compression = JPEG - Quality = 5
 - DPI = 150
- B&W Images
 - Compression = JBIG2
 - DPI = 300
- Object Removal
 - Alternate Images, Unused Resources, Embedded Thumbnails

- Other
 - Flatten All Comments, Flate Uncompressed Streams, Merge Duplicate Images, Merge Duplicate Fonts

Aggressive

High compression while sacrificing image quality

- Color Images
 - Compression = JPEG2000 - Quality = 3
 - DPI = 100
- Grayscale Images
 - Compression = JPEG2000 - Quality = 3
 - DPI = 100
- B&W Images
 - Compression = JBIG2
 - DPI = 150
- Object Removal
 - Alternate Images, Attachments, Metadata, Unused Resources, Embedded Thumbnails, Comments
- Other
 - Flatten All Fields, Flate Uncompressed Streams, Merge Duplicate Images, Merge Duplicate Fonts

Bookmarks

PDF Studio has the following options available to create, edit, or manage bookmarks within a PDF.

[Creating Bookmarks](#): how to create bookmarks in a PDF

[Deleting Bookmarks](#): how to delete bookmarks in a PDF

[Moving Bookmarks](#): how to move or rearrange bookmarks in a PDF

[Bookmarking Selected Text](#): add a bookmark for the currently selected text

[Renaming a Bookmark](#): editing or changing a bookmarks name

[Set Bookmark Destination](#): set the destination of the bookmark when clicked

[Editing Bookmark Actions](#): edit the actions associated with bookmarks

[Custom Bookmark Actions](#): a list of all the available actions that can be set on bookmarks

[Editing Bookmark Appearance](#) : edit the appearance of bookmarks

[Automatically Create Bookmarks](#): automatically create bookmarks within the PDF

Creating Bookmarks

PDF Studio is able to create bookmarks in a PDF. This is useful when creating a table of contents or list of shortcuts to specific sections within the PDF. Typically a bookmark will only have one action associated with it and will be a Go To Page action. However, in the PDF format definition, bookmarks can have many different [Bookmark Actions](#) associated with them.


How to Create Bookmarks

Bookmarks may be added as parents or as children to existing bookmarks. In both cases, the new bookmark is added as a Go To Page action for the current page view (the current page number, magnification, and scrollbar values). Clicking on a bookmark will move to the bookmarked page and the scrollbars and scale are also set as they were when the bookmark was created.

Note: *If any text is selected on the document, it will be used as the name of the bookmark. If not, the bookmark name will be based on the page number.*

Create Bookmark as a Parent

To add a bookmark as a parent do one of the following:

- Go to **Document > Create Bookmark**, or use the shortcut key Ctrl + B (Command + B on Mac)
- Click the add bookmark button  at the top of the bookmark panel
 - **Note:** *If the bookmark panel is not visible (this happens when a document doesn't have any bookmarks defined), click on **View > Bookmarks** to display the bookmarks pane.*
- Right click on an existing bookmark and go to **Add** in the right click menu and select **Before** or **After**

Create Bookmark as a Child (under a parent)

To create a bookmark as a child (underneath or a subgroup of the parent)

- Right click (Mac: Ctrl + Click) on an existing bookmark and go to **Add** in the right click menu and select **Child**

Bookmark Properties

To access the bookmark properties right click (Mac: Ctrl + Click) on the bookmark and choose Properties in the mouse menu. Bookmarks contain the following property settings.

Action

Bookmark Title - this is the label for the bookmark that will be displayed in the bookmarks pane

Bookmark Actions - After creation the bookmark's actions can be modified using this section. See [Editing Bookmark Actions](#) for a complete list of the available actions.

Appearance

Text Color - Sets the text color

Font Style - Sets the bookmark font to be either **Bold** or *Italic*

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*


Save as default - When checked this will make the selected appearance settings the default for any new bookmarks going forward

Deleting Bookmarks

PDF Studio is able to delete existing or created bookmarks from a PDF.

How to Delete Bookmarks

There are three ways that a bookmark can be deleted:

- Select the bookmark with the mouse and press Delete on your keyboard
- Select the bookmark with the mouse and click on the delete button  at the top of the bookmark panel

- Right-click (Mac: Ctrl + Click) on the bookmark in the bookmark tree and choose the Delete option in the mouse menu

Note: Hold down *SHIFT* or *CTRL* (Command on Mac) to edit multiple bookmarks.

Moving Bookmarks

PDF Studio can be used to move and reorganize bookmarks within the PDF document.

How to Move Bookmarks

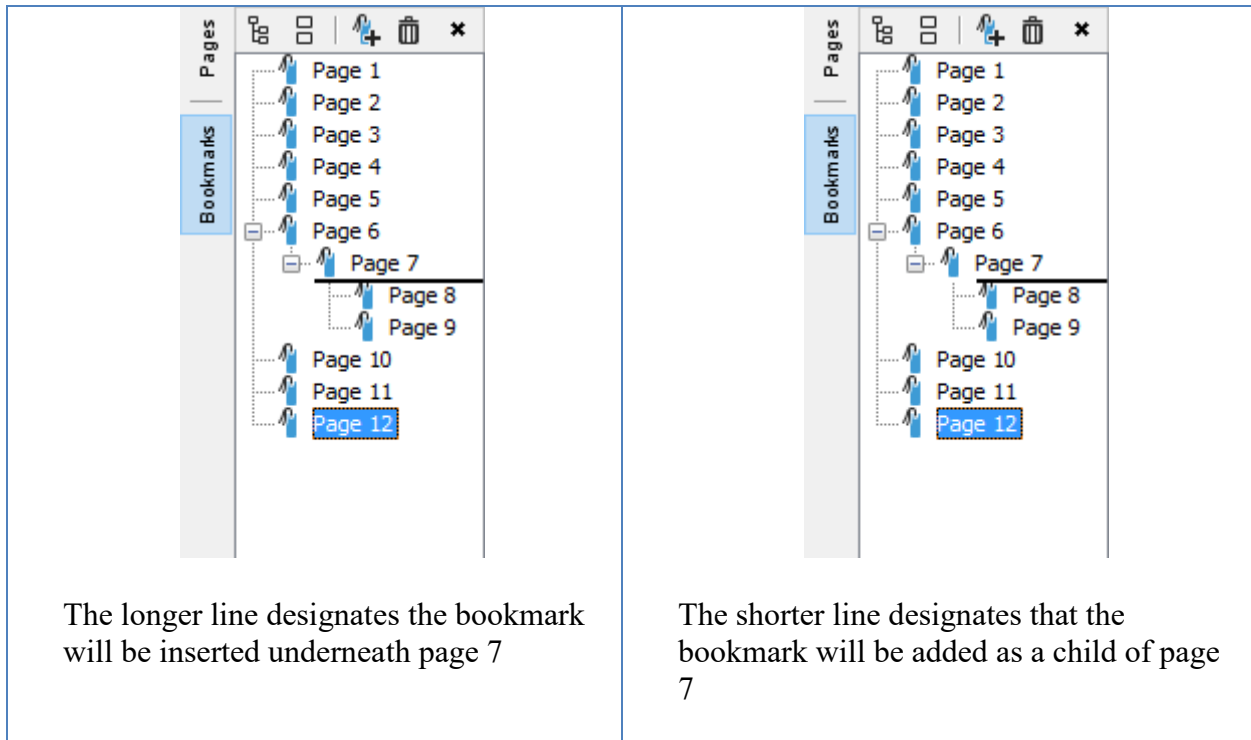
Bookmarks can be moved using either drag and drop or by using the cut and paste functions.

Note: Hold down *SHIFT* or *CTRL* (Command on Mac) to edit multiple bookmarks.

Using Drag and Drop

Bookmarks can be reorganized simply by dragging and dropping them to the desired location in the tree. When a bookmark is dragged to a target, a horizontal black line appears on the screen under the target bookmark. The length of the black line indicates whether the dragged bookmark will be inserted underneath the target bookmark, or added as a child to the target bookmark.

This bookmark will become a child of Page 6.	This bookmark will become a child of Page 7.
---	---




Using Cut & Paste

Cut and Paste can also be used to reorganize bookmarks. You can cut a bookmark from the tree by right-clicking (Mac: Ctrl + Click) on it and selecting cut or by using the keyboard shortcut, Ctrl+X (Mac: Cmd + C). Then paste the bookmark onto its new parent by right-clicking (Mac: Ctrl + Click) on an existent bookmark and selecting Paste or by using the keyboard shortcut, Ctrl+V (Mac: Cmd + V).

Bookmarking Selected Text


If a bookmark is created while some text is selected in a document, the bookmark will be created for the current page view and the selected text will be used as its name.

How to Create a Bookmark from Selected Text

1. Click on the Select Text icon  on the toolbar
2. Drag the mouse to select the desired text
3. Once you have the word or text selected, create the bookmark using one of the methods below:

Create Bookmark from Text as a Parent

To add a bookmark as a parent do one of the following:

- Go to **Document > Create Bookmark**, or use the shortcut key Ctrl + B (Command + B on Mac)
- Click the add bookmark button  at the top of the bookmark panel
 - **Note:** *If the bookmark panel is not visible (this happens when a document doesn't have any bookmarks defined), click on **View > Bookmarks** to display the bookmarks pane.*
- Right click on an existing bookmark and go to **Add** in the right click menu and select **Before** or **After**

Create Bookmark from Text as a Child (under a parent)

To create a bookmark as a child (underneath or a subgroup of the parent)

- Right click (Mac: Ctrl + Click) on an existing bookmark and go to **Add** in the right click menu and select **Child**

Renaming Bookmarks

By default the bookmark name will either be the page number which may not be as useful to the reader. Bookmarks can be renamed after creation so the reader can understand exactly where it will lead them.

How to rename a Bookmark

Bookmarks can be renamed using one of the following methods below:

- Double-click on the bookmark in the bookmark tree and the bookmark label will become editable. Enter the new name for the bookmark then to save the new name press Enter or click somewhere else
- Right-click (Mac: Ctrl + Click) on the bookmark in the bookmark tree and select the Rename option in the mouse menu and enter a new name.

Setting Bookmark Destination

A bookmark's destination is where the user will be taken within the document when clicked. By default this will be the exact same view and scale set when the bookmark was created. The destination can easily be changed if needed after being created.

How to Set a Bookmark Destination

A bookmark's destination can be changed using one of the following methods below:

Using Set Destination

1. Navigate to the location in the document that you want the bookmark to go to
2. Then Right-click (Mac: Ctrl + Click) on the bookmark in the bookmark tree and select Set Destination.
 - **Note:** *This will remove any actions currently associated with the bookmark and replace them with a Go To Page action for the current page and view.*

Using the Properties Dialog

1. Right click (Mac: Ctrl + Click) on the bookmark you wish to edit and choose Properties in the mouse menu.
2. Click on the Edit button below the Bookmark Actions section
3. Enter the details for the destination you would like the bookmark to go to
 - Page Number: the page number in the document
 - Zoom: the zoom to use if needed
 - Percent: only available if Custom is selected in Zoom
 - Set Visually: This allows you to set the destination by navigating to a point in the document. Once set the bookmark will go to the exact location and zoom level in the document that is set when using this function.

Editing Bookmark Actions

When a bookmark is created it will typically only have one action associated with it and that is the Go To Page action. However, in the PDF format definition, bookmarks can have many different Bookmark Actions associated with them. When adding a bookmark to a PDF document [Custom Bookmark Actions](#) can be created instead of the standard Go To Page action.

Note: *If a bookmark has multiple actions associated with it, actions will be executed in the order they were added to the bookmark.*

Modifying Bookmark Actions

Actions can be added, edited, and removed from a bookmark by following the instructions below

Adding Bookmark Actions

New actions can be added to a bookmark

1. Right click (Mac: Ctrl + Click) on the bookmark you wish to add an action to and choose Properties in the mouse menu.
2. The Action tab will display a list of actions currently associated with the bookmark.
3. Click on the Add button below the Bookmark Actions section
4. The Action Dialog will be displayed where the [Custom Bookmark Actions](#) can be set for the bookmark
5. Once complete click OK on the Action dialog and OK again to save the action

Editing Bookmark Actions

Existing actions in a bookmark can be edited

1. Right click (Mac: Ctrl + Click) on the bookmark you wish to edit and choose Properties in the mouse menu.
2. The Action tab will display a list of actions currently associated with the bookmark.
3. Click on the Edit button below the Bookmark Actions section
4. The Action Dialog will be displayed showing the properties for the currently selected action
5. Make the changes needed to the action
6. Once complete click OK on the Action dialog and OK again to save the action

Removing Bookmark Actions

Existing actions in a bookmark can be removed

1. Right click (Mac: Ctrl + Click) on the bookmark you wish to remove and choose Properties in the mouse menu.
2. The Action tab will display a list of actions currently associated with the bookmark.
3. Click on the Remove button below the Bookmark Actions section to delete the action from the bookmark
4. Once complete click OK to save the changes
 - **Note:** *It is possible to have a bookmark with no actions set.*

Custom Bookmark Actions

Below is a list of the each of the custom bookmark actions and their settings.

Go to a page in this document

Sets the bookmark to go to a page within the current document

- Page Number - the page number of the document to bookmark to
- Zoom - Set the page fit when navigating to the page
- Percent - The zoom level for Custom zoom setting
- Set Visually - Allows you to set the location of the bookmark visually

Go to a page in another document

Sets the bookmark to go to a page within a different designated document

- Page Number - the page number of the document to bookmark to
- Document - The full path to the document to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: *When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a File Attachment instead.*

Show/Hide Fields

Sets the bookmark to either Show or Hide selected fields within the document

- Show - Will show the selected fields when clicked
- Hide - Will hide the selected fields when clicked
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click (Command + Click for Mac) to select separate fields or Shift + Click to select a group of fields

Open File

Sets the bookmark to open a specific file.

- File - The full path to the file to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a File Attachment instead.

Open a web link

Set's the bookmark to open a specific web page or start an email. Examples of valid links:

- <http://www.qoppa.com>
- <ftp://ftp.site.com>
- <file:c:\qoppa\temp.txt>
- <mailto:johndoe@gmail.com>

Reset Form Fields

Sets the bookmark to reset the selected fields within the document

- All Fields - When checked will reset all the fields within the document
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click (Command + Click for Mac) to select separate fields or Shift + Click to select a group of fields

JavaScript Action

Sets the bookmark to perform a custom [Supported JavaScript](#) action that can be typed into the field.

Submit Form

Sets the bookmark to send the form field values to a designated location in one of 4 formats. This can be used to have an automatic way to send back forms or values once a user has completed the form.

- URL - The destination to send the selected file to. Examples of valid links:
 - <http://www.qoppa.com>
 - <ftp://ftp.site.com>
 - <file:c:\qoppa\temp.txt>
 - <mailto:johndoe@gmail.com>
- FDF - Sends an FDF file containing the selected field values
- XFDF - Sends an XFDF file containing the selected field values
- PDF - Sends a copy of the entire PDF
- HTML - Sends an HTML file containing the selected field values
- Fields - Sets the options when sending the field values
 - All Fields - Will send all fields regardless of value

- Include - Will include the selected fields in the list when sending the file
- Exclude - Will exclude the selected fields in the list when sending the file
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click (Command + Click for Mac) to select separate fields or Shift + Click to select a group of fields
- Send Empty Fields - When checked will send the selected fields values even when fields are empty

Show/Hide Layers

Sets the bookmark to either Show or Hide selected layers within the document

- Use Current Visibility - Sets the action to display the layers as they are currently being displayed so that if layers are turned off later they will return to the current state
- Other - Sets a new action for the layer using the below options
 - Show - Will show the selected layers in the list
 - Hide - Will hide the selected layers in the list
 - Toggle - Will switch the selected layer(s) state from hidden to displayed or displayed to hidden depending on the layers current state
 - Layers List - Displays a list of the layers in the document to select. To select more than one layer use Ctrl + Click (Command + Click for Mac) to select separate layers or Shift + Click to select a group of layers

Named Action

Sets the bookmark to perform one of standard predefined actions listed below.

- NextPage - Goes to the next page in the document
- PrevPage - Goes to the previous page in the document
- FirstPage - Goes to the first page in the document
- LastPage - Goes to the last page in the document
- Print - Starts the print dialog to print the current document
- Save - Saves the current document
- Open - Displays the open file dialog

Editing Bookmark Appearance

A bookmark's appearance can be edited to give the text a different color or style. This can be used when organizing the bookmarks to highlight or color code topics

How to Edit a Bookmark's Appearance

1. Right-click (Mac: Ctrl + Click) on the bookmark in the bookmark tree and select the Properties option in the mouse menu.
 - **Note:** *Hold down SHIFT or CTRL (Command on Mac) to edit multiple bookmarks.*
2. Then go to the Appearance tab and set the below settings
3. Once complete click OK to save the changes

Appearance Settings

Text Color - Sets the text color

Font Style - Sets the bookmark font to be either **Bold** or *Italic*

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Save as default - When checked this will make the selected appearance settings the default for any new bookmarks going forward

Automatically Create Bookmarks

Bookmarks can automatically be created for every page within the PDF document.

How to Automatically Create Bookmarks

1. Go to **Document > Auto Create Bookmarks**. This will display the Auto Create Bookmarks dialog.
2. Select the options to automatically create bookmarks
 - Create bookmarks for all pages: this will add Go To Page action bookmarks for every page in the document
 - Create bookmarks for selected pages: This will add Go To Page action bookmarks for each page in the given range.
3. Once the bookmarks have been created bookmarks can be rearranged or edited as normal.

Headers and Footers

PDF Studio has the following options available when working with Headers and Footers on a PDF.

[Creating Headers and Footers](#): How to create and apply a header and footer to a PDF

[Header and Footer Options](#): The options available when adding headers and footers

[Header and Footer Profiles](#): Using and managing existing header and footer profiles

[Removing Headers and Footers](#): Removing headers and footers from a document

Creating Headers and Footers

PDF Studio can add custom headers and footers on a PDF. This can be used to add page numbers to a document or add a custom label to pages within the document.

How to Create and Apply Headers and Footers

1. Open the document that you would like to add a header and/or footer to
 - **Note:** *This is not a required step if you only wish to create a watermark profile without applying it immediately.*
2. From the menu, go to **Document -> Header & Footer -> Add**
3. Fill in the desired [Header and Footer Options](#). A name for a [Header and Footer Profile](#) can also be set during this step to save the settings to be reused later.
 - **Note:** *You do not need to create or save a header and footer profile before applying them to a document. To save the current header and footer configuration, click on the Save button and enter a name.*
4. To apply the headers and/or footers to the document, click on Apply

Header and Footer Options

Below are the options available when adding headers and footers to a PDF document.

Settings

The options for a header and footer are as follows:

Profile

Name - Name of the header and footer profile (if created). To create a new profile select "<new profile>" and click Save. Then enter a name for the new profile

Show on Menu - Whether to show this header and footer configuration on the header and footer menu for faster access.

Margins

Units - Units to use when calculating the position of the header and footer. This can be inches, centimeters, or points. Points are calculated in the PDF standard, 72 points per inch.

Top - The distance of the margin from the top

Bottom - The distance of the margin from the bottom

Left - The distance of the margin from the left

Right - The distance of the margin from the right

Appearance

Font - The font for the header and footer

Font Size - The font size for the header and footer

Font Color - The font color for the header and footer

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Border - Sets a border around the header and footer text

Background - Background color settings for the header and footer text

Pages

Page Range - The range of pages to be cropped

- All Pages: all pages in the document
- Page Range: set the pages to be cropped using the From and To options
- Even Pages Only: only crops the even pages

- Odd Pages Only: only crops the odd pages

Header & Footer

This section defines the text content for the different mark areas in the document

Header Left - Text placed in the left of the header

Header Center - Text placed in the center of the header

Header Right - Text placed in the right of the header

Footer Left - Text placed in the left of the footer

Footer Center - Text placed in the center of the footer

Footer Right - Text placed in the right of the footer

Insert - Use these options to insert custom variables within the content sections. Place the cursor where you would like the text and then click on the variable option you want to insert. These variables will be used when the headers and footers are placed on the document

- Date - creates a date variable
- Page Number - creates a page number variable
- Bates Number - creates a bates number variable
- Other - displays a list of other supported variables
 - \$page – The page number
 - \$author – The username of the logged in account
 - \$totalpages – The number of pages in the document
 - \$filename – The file name that the document was opened from
 - \$filepath – The full file path that the document was opened from
 - \$date – The current date formatted as Nov 28, 2007
 - \$shortdate – The current date formatted as 11/28/07
 - \$time – The current time
 - \$day – The current day of the month
 - \$month – The current month, using two digits
 - \$year – The current year, using four digits
 - \$shortyear – The current year, using two digits
 - \$second – The current second
 - \$minute – The current minute
 - \$hour – The current hour, 1-12
 - \$ampm – AM or PM
 - \$longhour – The current hour, 0-23

Preview Section

Allows you to see how the header and footer will look on the document once placed. Use the arrow buttons and drop down to navigate and preview a different page in the document.

Header and Footer Profiles

Header and footer Profiles allow you to save custom header and footer settings as templates that can be used again later to add header and footer documents. There is also an option available to "Show on Menu" and when this is set for the profile it will be put under **Document -> Header & Footer** so that the profile can be run in just two clicks from the document menu.

Note: *You do not need to create or save a header and footer configuration before adding a header and footer to a document. To add a header and footer to a document without saving settings just go to Document -> Header and Footer -> Add and choose the settings to use and click Apply to run the header and footer settings without saving a profile.*

Creating a Header and Footer Profile

1. Select **Document -> Header & Footer -> Add** from the menu.
2. Fill in the desired [Header and Footer Options](#) for the current header and footer configuration.
3. Set all of the options that you would like to have in your profile. You can either start from an existing profile or a blank template by selecting "<new item>" from the drop down.
4. Once you have completed your settings, click on Save. This will bring up a window to name your profile.
5. If you are starting from a blank template this field will be blank. If you started from a previous profile the previous profiles name will be displayed. If you would like to just update the previous profile leave the name and click OK. If you would like to create a new profile just type in the new name you would like to save it as and click OK.
6. Once complete your profile will now be available in the drop down menu as well as the quick options in the menu bar

Add a Header and/or Footer to a PDF Document Using an Existing Profile

There are 2 ways to apply an existing header and footer profile:

From the header and footer dialog

Open the document that you would like to add a header and footer to. Open the header and footer dialog from **Document -> Header & Footer -> Add**. Choose the header and footer profile from the drop down list in the combo box, click on the Apply button at the bottom of the dialog.

From the header and footer menu

Open the document that you would like to add a header and footer to. Under the **Document -> Header & Footer** menu, there is a list of all the header and footer profiles that you have previously created.

Note: *Only the ones for which you chose the Show on Menu option will appear on this list. Click on the header and footer profile in the list you'd like to run and it will begin immediately using the settings saved in the header and footer profile.*

Removing Headers and Footers

PDF Studio can remove existing Headers and footers from PDF Documents. This function will remove all headers and footers from every page of the document.

Note: *Not all text at the top or the bottom of the page is a header or a footer. In order for PDF Studio to remove headers and footers the text must have been added to the document as a header and footer following the PDF standards. If not, the headers and footers will not be removed by this feature. Instead you will need to use [Content Editing](#) to remove them*

How to Remove All Headers and Footers

Select **Document -> Header & Footer -> Remove** from the menu. This will remove all headers and footer from every page within the entire document.

Watermarks

PDF Studio has the following options available when working with Watermarks on a PDF.

[Creating a Watermark](#): How to create and apply a watermark to a PDF

[Watermark Options](#): The options available when adding watermarks

[Watermark Profiles](#): Using and managing existing watermark profiles

[Removing Watermarks](#): Removing watermarks from a document

Creating a Watermark

PDF Studio can add custom watermarks to a PDF. This can be used to add either a company logo or a label such as "Confidential" to pages within the document.

How to Create and Apply Watermarks

1. Open the document that you would like to add a watermark to
 - **Note:** *This is not a required step if you only wish to create a watermark profile without applying it immediately.*
2. From the menu, go to **Document -> Watermark -> Add**
3. Fill in the desired [Watermark Options](#). A name for a [Watermark Profile](#) can also be set during this step to save the settings to be reused later.
 - **Note:** *You do not need to create or save a watermark profile before applying them to a document. To save the current watermark configuration, click on the Save button and enter a name.*
4. To apply the watermark to the document, click on Apply

Watermark options

Below are the options available when adding watermarks to a PDF document.

Settings

The options for a watermark are as follows:

Profile

Name - Name of the watermark profile (if created). To create a new profile select "<new profile>" and click Save. Then enter a name for the new profile

Show on Menu - Whether to show this watermark configuration on the watermark menu for faster access.

Appearance

Units - Units to use when calculating the position of the watermark. This can be inches, centimeters, millimeters, or points. Points are calculated in the PDF standard, 72 points per inch.

Horizontal – The horizontal location is relative to the left, right, or center of the page according to the choice in the drop down box. The number entered here is interpreted in units.

Vertical – The vertical location is relative to the top, bottom, or center of the page according to the choice in the drop down box. The number entered here is interpreted in units.

Rotation – Rotate the watermark (text or image) by the given degrees clockwise.

Transparency – Transparency of the watermark. 100% is invisible and 0% is opaque.

Show on Screen - Whether or not to show the watermark when viewing the document

Show on Print - Whether or not to show the watermark when the document is printed

Pages

Page Range - The range of pages to be cropped

- All Pages: all pages in the document
- Page Range: set the pages to be cropped using the From and To options
- Even Pages Only: only crops the even pages
- Odd Pages Only: only crops the odd pages

Watermark

You have the option to add either a text or image watermark to the document. The options will change based on whether or not text or image is selected.

Text Watermark Options

Text - Enter the text to be displayed on the watermark

Insert - Use these options to insert custom variables within the content sections. Place the cursor where you would like the text and then click on the variable option you want to insert. These variables will be used when the headers and footers are placed on the document

- Date - creates a date variable
- Page Number - creates a page number variable
- Bates Number - creates a bates number variable
- Other - displays a list of other supported variables
 - \$page – The page number
 - \$author – The username of the logged in account
 - \$totalpages – The number of pages in the document
 - \$filename – The file name that the document was opened from
 - \$filepath – The full file path that the document was opened from
 - \$date – The current date formatted as Nov 28, 2007
 - \$shortdate – The current date formatted as 11/28/07
 - \$time – The current time
 - \$day – The current day of the month
 - \$month – The current month, using two digits
 - \$year – The current year, using four digits
 - \$shortyear – The current year, using two digits
 - \$second – The current second
 - \$minute – The current minute
 - \$hour – The current hour, 1-12
 - \$ampm – AM or PM
 - \$longhour – The current hour, 0-23

Font - The font for the watermark

Font Size - The font size for the watermark

Font Color - The font color for the watermark

B - Makes all of the text **Bold**

I - Makes all of the text *Italic*

Border - Sets a border around the watermark text

Background - Background color settings for the watermark text

Alignment - choose how the text should be aligned




-  Aligns the text to the left
-  Aligns the text in the center
-  Aligns the text to the right

Image Watermark Options

File – The path to the image file. Accepted formats are jpg, png, gif, & tiff.

Scale – The scale to apply to the image (100% for the full-size image)

Preview Window

Allows you to see how the watermark will look on the document once placed. Use the arrow buttons and drop down to navigate and preview a different page in the document.

Watermark Profiles

There are two ways to apply an existing watermark:

1. From the Watermark dialog. Open the document that you would like to apply a watermark to. Open the Watermark dialog from **Document > Watermark > Create Watermark**. Choose the watermark from the drop down list in the combo box, click on the Apply button at the bottom of the dialog.
2. From the Watermark menu. Open the document that you would like to apply a watermark to. Under the Watermark menu, there is a list of all of the watermarks you have previously created. Note that only the ones for which you chose the option Show on Menu will appear in this list. Click on the watermark in the list that you would like to apply.

Removing a Watermark

PDF Studio can remove existing watermarks from PDF Documents. This function will remove all watermarks from every page of the document.

Note: *Not all text or images above text is a watermark. In order for PDF Studio to remove watermarks the text must have been added to the document as a watermark following the PDF standards. If not, the watermarks will not be removed by this feature. Instead you will need to use [Content Editing](#) to remove them*

How to Remove All Watermarks

Select **Document -> Watermark -> Remove** from the menu. This will remove all watermarks from every page within the entire document.

OCR PDF

PDF Studio is capable of OCRing documents using any of the available OCR languages to add text to documents. OCR allows you to add text to scanned documents or images so that the document can be searched or marked up as you would any other text document.

What is OCR?

Optical character recognition (OCR) is the mechanical or electronic conversion of images of typed or printed text into machine-encoded searchable text data.


From Existing Document

Text can be added to an existing document using OCR

1. Launch PDF Studio and open the PDF document that you wish to add searchable text to
2. Go to **Document -> OCR – Create Searchable PDF** from the menu
3. From the Language drop down select the language you wish to use
 - **Note:** *The first time using OCR you will need to download the language packs. To do so click on “Download OCR Languages“, then select the languages you wish to use and click on “Download”*
4. Select the Page Range and Resolution that you wish to use
 - **Note:** *A resolution of 300 DPI produces good OCR results for most images. When dealing with scans containing noise, you may try using a lower DPI setting to get rid of the noise and obtain better OCR results.*
5. Click on “OK” to begin the OCR process
6. You will see a progress dialog showing you the current page being processed. Once complete click on “OK” to close the dialog
7. Your document is now ready to be searched, edited, or marked up with highlights, underlined, crossed-out or used with caret annotations.

When Scanning a Document

OCR can add text to a document at the same time it is being scanned with PDF Studio

1. Launch PDF Studio and start the scanning tool by either clicking on the Scanner button  on the toolbar or going to **File -> Create PDF -> From Scanner**
2. In the scanning dialog you will see an option to OCR the document after scanning
3. From the Language drop down select the language you wish to use
 - **Note:** *The first time using OCR you will need to download the language packs. To do so click on "Download OCR Languages", then select the languages you wish to use and click on "Download"*
4. After setting all of your scanning and OCR settings click on "Scan" to begin scanning the document
5. Once the scanning completes the OCR process will begin and you will see a progress dialog showing you the current page being processed. Once complete click on "OK" to close the dialog
6. Your document is now ready to be searched, edited, or marked up with highlights, underlined, crossed-out or used with caret annotations.

Available OCR Languages

The following language dictionary files are available for download directly from within PDF Studio OCR functions.

- | | |
|-----------|--------------|
| • Danish | • Italian |
| • Dutch | • Norwegian |
| • English | • Polish |
| • Finnish | • Portuguese |
| • French | • Spanish |
| • German | • Swedish |

Using the appropriate language file will improve the accuracy of OCR results. See [Tips on Improving OCR Results](#) for additional information

Batch Processing

Batch processing is a simple, fast way to modify multiple documents at once. A batch process is configured by [Selecting Batch Files](#), [Configuring Batch Output](#), [Setting Open Passwords](#), and configuring the job specific options:

[Batch Header and Footer](#): Add a header and/or footer to a batch of PDFs

[Batch Watermark](#): Add a watermark to a batch of PDFs

[Batch Convert](#): Convert a batch of [Supported Files](#) to PDF

[Batch Convert to PDF/A](#): Convert a batch of PDFs to PDF/A

[Batch Crop](#): Crop a batch of PDFs

[Batch Export Forms](#): Export form field data from a batch of PDFs

[Batch Extract Pages as Images](#): Convert the pages from a batch of PDFs to images

[Batch Extract Text](#): Extract text from a batch of PDFs

[Batch Merge](#): Merge a batch of PDFs to a single document

[Batch OCR](#): OCR a batch of PDFs to add searchable text

[Batch Optimize](#): Optimize a batch of PDFs to reduce the file size

[Batch Preflight](#): Verify document compliance using various PDF standards for a batch of PDFs

[Batch Print](#): Print a batch of PDFs

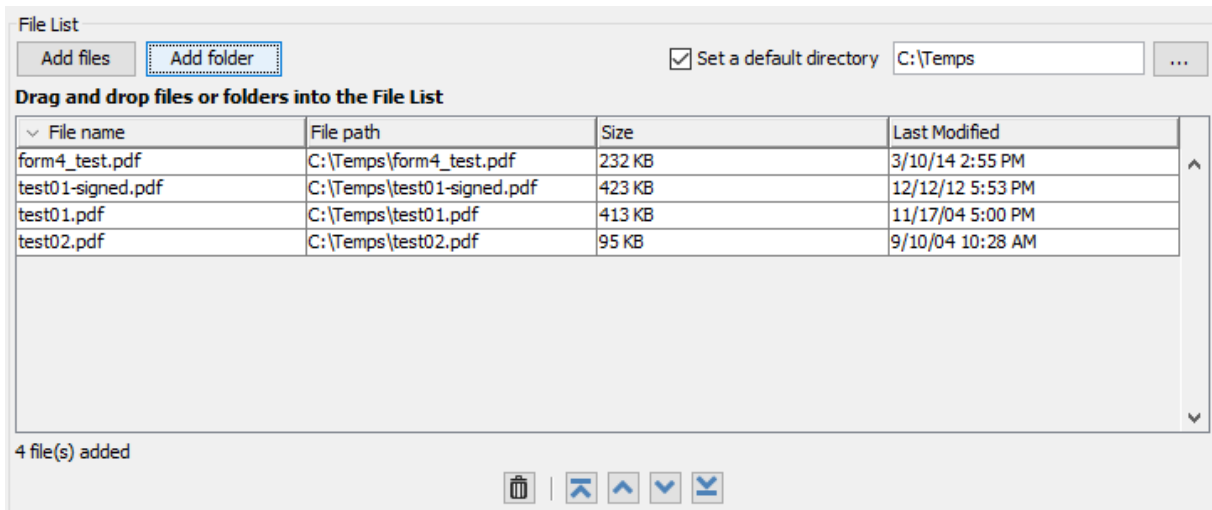
[Batch Set Initial View](#): Set the initial view settings for a batch of PDFs

[Batch Set Security](#): Set the security settings for a batch of PDFs

[Batch Split](#): Split a batch of documents

Selecting Batch Files

PDF Studio has the ability to batch process files allowing you to modify or change many files at once. The first step of any batch process is to first select the files that need to be processed. The File List section is where files or documents can be added, removed, and reordered for the batch process.



Using the File List

When adding files for a batch process the following options are available:

Adding Batch Files

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

Drag & Drop - Files and folders can be dragged and dropped from your desktop or folder directly into the File List.

- Files: dragging and dropping files will add only those specific files to the File List
- Folders: dragging and dropping folders will add all files within the folder to the File List

Note: *The type of files that can be added to the File List will depend on the batch process being used.*

Deleting Batch Files

 - Removes the selected file(s) from the list.

Delete - Press the Delete key on your keyboard to remove the selected file(s) from the list.


***Note:** Multiple files can be selected at once by holding down CTRL (Command on Mac) and then clicking on each file in the list.*

Reorganizing Batch Files

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

***Note:** Multiple files can be selected at once by holding down CTRL (Command on Mac) and then clicking on each file in the list.*

Setting Directory Defaults

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Configuring Batch Output Settings

When processing multiple PDF files during a batch the process a location will need to be specified for the PDF files once they have been processed. These settings are configured per batch.

Save Files To

☐ Overwrite Source Files

☒ Destination Folder:

...

☐ Overwrite files

Batch Output Settings

The following output settings are available when working with batches.

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

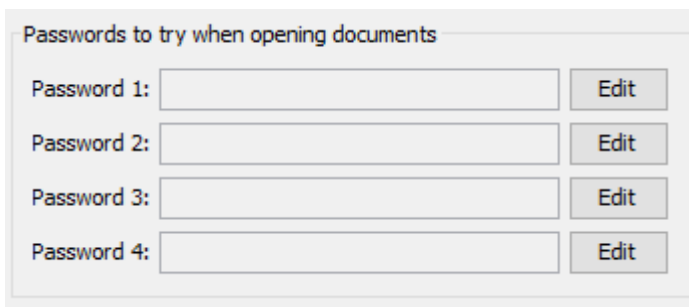
***Note:** This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Setting Open Passwords on Batch

When processing multiple PDF files during a batch some files may require a password to be opened. Up to four possible passwords can be added to batch settings that can be used to attempt to open any password protected files. These settings are configured per batch.



Passwords to try when opening documents

Password 1: Edit

Password 2: Edit

Password 3: Edit

Password 4: Edit

Batch Open Password Settings

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Header and Footer

Batch header and footer allows you to add headers and footers to multiple PDF documents at once.

How to Apply Headers and Footers to a Batch

1. On the menu bar go to **Batch -> Apply Header and Footer to a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select an existing profile from the drop down, click on Add to create a new one, or click on Edit to modify an existing profile
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Header and Footer Settings

Select Header & Footer

Profile - Click on the drop down choose the [Header and Footer Profile](#) to be used for the batch process

Add - Use Add to create a new profile to be used for this batch process

Edit - Click edit to modify the currently selected profile in the drop down

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

Note: *This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Watermark

Batch watermark allows you to add watermarks to multiple PDF documents at once.

Apply Watermark to a Batch

The image shows a software interface for applying a watermark to a batch of PDFs. It has a title bar that says "Apply Watermark to a Batch". Below the title bar is a "Select Watermark" section. This section contains a dropdown menu with a downward arrow, currently showing "PAID Sample". To the right of the dropdown are two buttons: "Add" and "Edit".

How to Apply Watermarks to a Batch

1. On the menu bar go to **Batch -> Apply Watermark to a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select an existing profile from the drop down, click on Add to create a new one, or click on Edit to modify an existing profile
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Watermark Settings

Select Watermark

Profile - Click on the drop down choose the [Watermark Profile](#) to be used for the batch process

Add - Use Add to create a new profile to be used for this batch process

Edit - Click edit to modify the currently selected profile in the drop down

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

Note: *This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

***Note:** The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Convert

Batch convert allows you to convert [supported](#) non-PDF files into PDF documents. This function is similar to [Converting Files to PDF](#) except it will convert many files at once.

How to Batch Convert Files to PDF

1. On the menu bar go to **Batch -> Convert a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Convert Settings

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

- ⬆ - Moves the selected file(s) up the list.
- ⬇ - Moves the selected file(s) down the list.
- ⬆⬆ - Moves the selected file(s) to the top of the list.
- ⬇⬇ - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

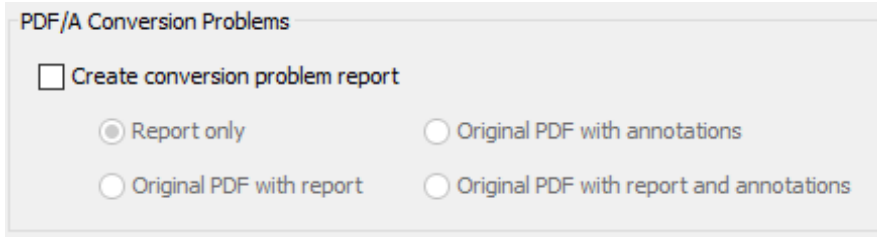
Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

The open password settings will be disabled when converting to PDF. Only PDF files with passwords are supported.

Batch Convert to PDF/A

Batch convert to PDF/A allows you to convert all PDF documents to PDF/A. This will function the same as [Converting to PDF/A-1B](#) when working with single documents. Use the settings below to create a conversion report if needed.



The screenshot shows a settings panel titled "PDF/A Conversion Problems". It contains a checkbox labeled "Create conversion problem report". Below this checkbox are four radio button options arranged in two rows. The first row has "Report only" (selected) and "Original PDF with annotations". The second row has "Original PDF with report" and "Original PDF with report and annotations".

How to Batch Convert PDFs to PDF/A

1. On the menu bar go to **Batch -> Convert a Batch to PDF/A**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - Set the PDF/A conversion problem settings
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch PDF/A Convert Settings

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

Note: *This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

PDF/A Conversion Problems

Create Conversion Problem Report - Check this box to produce an error report using one of the settings below for any PDFs that were unable to be converted to PDF/A

- Report only: generates a PDF showing only the errors
- Original PDF with report: generates a separate PDF that has the error report appended to the beginning of the document
- Original PDF with annotations: generates a separate PDF with annotation marks on all errors
- Original PDF with report and annotations: generates a separate PDF with annotation marks on all errors as well as an error report appended to the beginning of the document

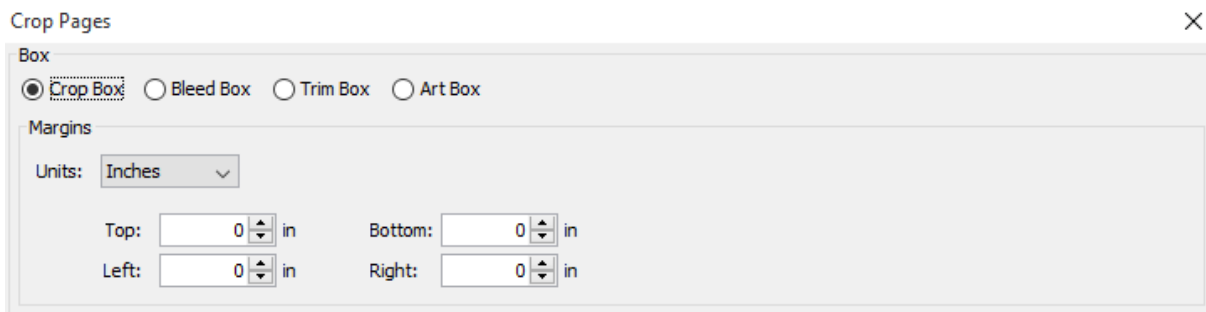
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Crop

Batch crop allows you to adjust the crop margins on a batch of documents.



How to Crop a Batch of PDFs

1. On the menu bar go to **Batch -> Crop a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Set the crop settings for the batch
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Crop Settings

Crop Box

Box

Crop box – the region to which the contents of the page are to be or cropped when displayed or printed.

Bleed box – the bounds to which the contents of the page should be clipped when output in a production environment.

Trim box – the intended dimensions of the finished page after trimming.

Art box – the extent of the page's meaningful content (including potential white space) as intended by the document creator.

Margins

Units - Select the measurement unit for the crop margins in either Inches, Points, Centimeters, or Millimeters

Top - The distance of the margin from the top

Bottom - The distance of the margin from the bottom

Left - The distance of the margin from the left

Right - The distance of the margin from the right

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

***Note:** This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

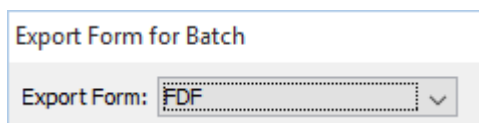
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Export Forms

Batch export forms allows you to export forms to FDF, XFDF, XDP, or XML from multiple documents at once.



How to Export Forms from a Batch of PDFs

1. On the menu bar go to **Batch -> Export Form for Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Set the type of file to export to
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Form Export Settings

Select Export Type

Select to export the document's forms as either an FDF, XFDF, XDP, or XML

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

Note: *This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

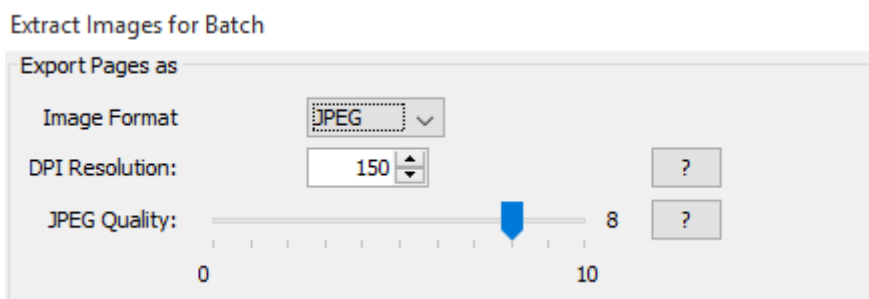
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Extract as Images

Batch Extract as Images allows you to extract the pages from a batch of documents as images. Each page of each document will be saved as a separate image file.



How to Extract Pages as Images for a Batch of PDFs

1. On the menu bar go to **Batch -> Extract Images for Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Set the type of file to export to
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Image Export Settings

Select Image Settings

Image Format – Choose from JPEG, PNG, TIFF, GIF.

DPI Resolution – Set the resolution used to render the page.

JPEG quality – The quality of JPEG compression, ranges from 0 to 10. Generally 8 is high quality, 5 is medium quality, and 2 is low quality.

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Extract Text

Batch extract text allows you to extract text from multiple PDF documents. Each document will output a text file with the text contents of that document.

Note: *If the document does not contain text (for example: scanned documents or images) it will need to be OCR'd first so that there is text to extract.*

How to Extract Text from a Batch of PDFs

1. On the menu bar go to **Batch -> Extract Text for Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Extract Text Settings

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

***Note:** The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Merge a Batch

Batch merge allows you to merge any of the [Supported File Types](#) to a single PDF. This batch process functions exactly the same as [Merging/Converting multiple files to PDF](#).

How to Merge/Convert a Batch of Files to PDFs

1. On the menu bar go to **Batch -> Merge a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Merge/Convert Settings

Bookmarks

Add a bookmark for each merged document - This will create a separate bookmark for each merged file added to the document

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Results

Open New Merged Document - After the merge is complete the new file will be displayed in PDF Studio

Save As - This option allows you to set a destination for the newly created merged file. You can type the destination manually or click on the "..." button to open a file chooser to set the destination for the newly created file

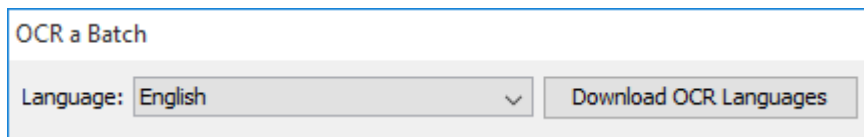
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process. Only PDF files with passwords are supported.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch OCR

Batch OCR adds text to any documents that do not contain text using any of the supported OCR languages.



How to OCR a Batch of PDFs

1. On the menu bar go to **Batch -> OCR a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select a language from the drop down or click on Download OCR Languages to download a new one.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch OCR Settings

Select Watermark

Language - Select the language to OCR the documents with

Download OCR Languages - Opens the language download manager

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

- ⬆ - Moves the selected file(s) up the list.
- ⬇ - Moves the selected file(s) down the list.
- ⬆⬆ - Moves the selected file(s) to the top of the list.
- ⬇⬇ - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

***Note:** This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

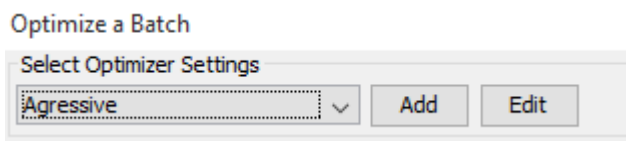
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

***Note:** The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Optimize

Batch Optimize allows you to optimize all selected documents using the profile options selected at the top. Choose an existing preset profile or click on "Add" to create a new one to use in optimizing the batch.



How to Optimize a Batch of PDFs

1. On the menu bar go to **Batch -> Optimize a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select an existing profile from the drop down, click on Add to create a new one, or click on Edit to modify an existing profile
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Optimize Settings

Select Optimizer Settings

Profile - Click on the drop down choose the [Optimizer Profile](#) to be used for the batch process

Add - Use Add to create a new profile to be used for this batch process

Edit - Click edit to modify the currently selected profile in the drop down

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

- ▼ - Moves the selected file(s) down the list.
- ⬆ - Moves the selected file(s) to the top of the list.
- ⬇ - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

***Note:** This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

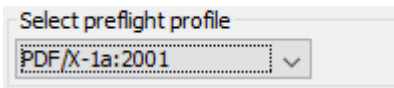
To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

***Note:** The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Preflight

Batch Preflight allows you to verify the compliance of a batch of PDF documents against a selected archival standard. After the process completes, the results of the preflight check are displayed in a dialog.

Preflight a Batch



How to Preflight a Batch of PDFs

1. On the menu bar go to **Batch -> Preflight a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select the [verification profile](#) to be used
 - Using the File List select the files that need to be processed
 - Set the results settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Preflight Settings

Select Preflight Profile

Profile - Click on the drop down choose the [Preflight Verification](#) Profile to be used for the batch process

- PDF/X-1a:2001 – ISO 15930-1
- PDF/X-1a:2003 – ISO 15930-4
- PDF/X-3:2002 – ISO 15930-3
- PDF/X-3:2003 – ISO 15930-6
- PDF/A-1B

File List

Add Files - Displays a file chooser to add individual files to the list.

Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

- ⬆ - Moves the selected file(s) up the list.
- ⬇ - Moves the selected file(s) down the list.
- ⬆ - Moves the selected file(s) to the top of the list.
- ⬇ - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Results

In addition to displaying the preflight results dialog, results can be saved in a variety of configurable ways. If preflighting encounters any errors, these errors can be added to the document as annotations and/or a report detailing the errors can be created. The report is either appended to the document or saved as a new document. The modified document and/or the new report document are saved to the destination folder.

Add annotations for preflight errors - whether or not to add annotations to the original document for preflight errors

Create Preflight report - whether or not to create a separate report for the preflight errors using the below options

Append report to document - appends an error report to the beginning of the document

Create new document for report - creates a separate document for the error report that will be exported to the below destination folder

Destination Folder - This option allows you to set a destination folder to place all of the error reports. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Print

Batch print allows you to print multiple PDF documents at the same time to a specific printer.

Note: *The last used printer dialog will be used when printing a batch. For more information on each of the printing dialogs see [Printing PDFs](#)*

How to Print a Batch of PDFs

1. On the menu bar go to **Batch -> Print a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Print Settings

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

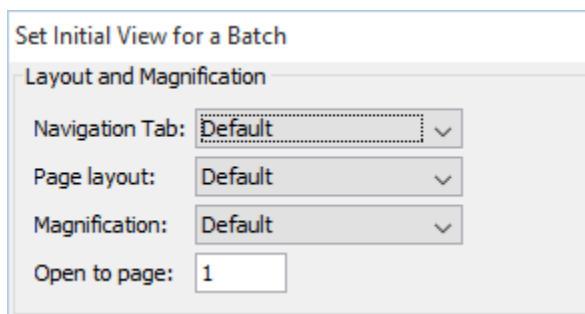
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Set Initial View

Batch set initial view allows you to modify the initial display properties of multiple PDF documents.



How to Set the Initial View Settings to a Batch of PDFs

1. On the menu bar go to **Batch -> Batch Set Initial View for Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Set the initial view options for the documents
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Header and Footer Settings

Select Layout & Magnification Options

Navigation Tab – Set which navigation tab if any is automatically opened when the document is opened.

Page Layout – Set whether there will be a single page or two facing pages as the layout, and whether or not the layout will be continuous.

Magnification – Set the initial magnification level for the document.

Open To Page – Set the page the document is opened to.

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

Note: *This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

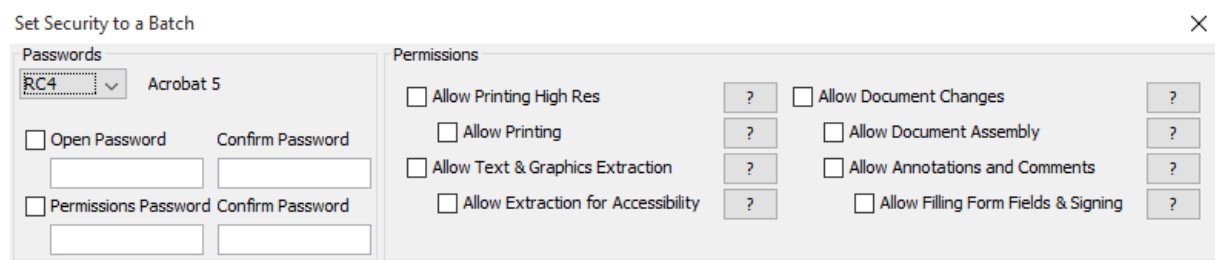
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Set Security

Batch set security allows you to modify the security settings of multiple PDF documents at once. This will set the EXACT same password and security settings on all documents in the list.



How to Set Security on a Batch of PDFs

1. On the menu bar go to **Batch -> Set Security to a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Set the password and permission settings to be set for the documents

- Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Set Security Settings

Passwords

Open Password – also known as the user password, it is the password that will be required when the documents are opened.

Permissions Password – also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

Permissions

Allow Printing High Res – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

Allow Printing - Allow printing the document

Allow Text & Graphics Extraction – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

Allow Extraction for Accessibility – Extract text and graphics in support of accessibility to disabled users or other purposes

Allow Document Changes – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

Allow Document Assembly – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

Allow Annotations & Comments – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted, then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

Allow Filling Form Fields & Signing - Fill in existing interactive form fields including signature fields.

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Overwrite Source Files - This option will overwrite the original PDF file during the batch process. This option is not available for any conversion processes.

***Note:** This CAN NOT be undone. Make sure that you have all your settings correct prior to starting the batch process*

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

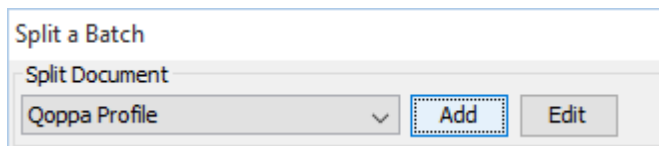
Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Batch Split Documents

Batch split allows you to split multiple PDF documents into separate files using an existing profile. Each document will be handled individually using the split profile selected during the batch process.



How to Split a Batch of PDF Documents

1. On the menu bar go to **Batch -> Split a Batch**
2. Set the options for the batch process. Additional details for each of the settings are available below.
 - Select an existing profile from the drop down, click on Add to create a new one, or click on Edit to modify an existing profile
 - Using the File List select the files that need to be processed
 - Set the destination settings for the processed batch files
 - If needed, set any open passwords to be attempted when processing files
3. Once all of the settings are complete, click on Start... to begin the batch process.

Batch Split Settings

Select Split Profile

Profile - Click on the drop down choose the [Split Profile](#) to be used for the batch process

Add - Use Add to create a new profile to be used for this batch process

Edit - Click edit to modify the currently selected profile in the drop down

File List

Add Files - Displays a file chooser to add individual files to the list.


Add Folder - Displays a file chooser that adds the contents of a directory to the list.

 - Removes the selected file(s) from the list.

 - Moves the selected file(s) up the list.

 - Moves the selected file(s) down the list.

 - Moves the selected file(s) to the top of the list.

 - Moves the selected file(s) to the bottom of the list.

Set Default Batch Directory - When checked, all files from the default batch directory will be added to the File List each time a batch dialog is opened.

Save Files To

Destination Folder - This option allows you to set a destination folder to place all of the processed files. You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

Overwrite Files - When checked, if a file with the same name as the file being processed is located in the destination folder it will be overwritten with the newly processed PDF file. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.

Passwords to try when opening documents

To set a password click in the password field or on the Edit button. Then enter the password you want to be used. Do this for up to four passwords to try on password protected PDFs during the batch process.

Note: *The passwords entered here will only be used for this batch process and will not be stored anywhere else. Passwords will have to be entered for each new batch process.*

Creating and Editing PDF Forms

PDF Studio supports standard form fields in PDF documents and allows you to create, edit, and fill out PDF forms in PDF documents.

[Filling PDF Forms](#): Filling and completing existing PDF forms

[Exporting PDF Form Data](#) **Pro**: Exporting form field data from PDFs

[Importing PDF Form Data](#) **Pro**: Importing form field data into PDFs

[Resetting Form Fields](#): Resetting existing PDF form fields to their default values

[Flattening Form Fields](#): Flatten form fields and their data onto the page

[Highlighting Form Fields](#): Highlights existing form fields on the page to make them more noticeable

[Creating Interactive PDF Forms](#) **Pro**: How to create, edit, and delete form fields on PDFs


[PDF Form JavaScript](#): Custom JavaScript actions that are supported in form fields

Filling PDF Forms

PDF Studio can be used to fill and complete existing interactive form fields within a PDF. Once complete the form can be printed or saved just as any other PDF document.




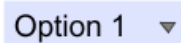
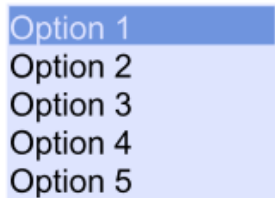


Note: *To fill a non-interactive form, when the form is simply a scanned page and there are no active fields on it, you can use the [Typewriter Tool](#).*

How to fill PDF form Fields

To fill a PDF interactive form, simply open the document by clicking **File -> Open** and fill the forms using the instructions for each field type below. Use the Tab key to navigate to the next field and Shift + Tab to go to the previous field. To save all of the data entered into the PDF form, simply save the PDF document by going to **File -> Save** or clicking on the save button .

Note: *LiveCycle XFA forms – also called dynamic XFA forms – are not supported in PDF Studio. For more information on these special form fields see our knowledge base [here](#).*

The following form field types are supported in PDF Studio:

Text Fields	Allows you to enter text into the field. In some cases there may be formatting rules in place that will only allow you to enter a specific type of information. For example: time or date fields.	
Check Boxes	Can either be checked or unchecked. Multiple check boxes can be checked at once.	
Radio Buttons	Similar to a check box except radio buttons belong to groups and so only one button in each group can be checked at a time	
Combo Boxes	A drop down menu that displays a list of choices. Click on the down arrow to display the list of available options. In some cases this field will also allow custom text to be entered	
List Box	Displays a list of multiple choice items in a box that can be selected. In some cases the field will also allow multiple items to be selected at once. To select more than one item at a time, hold down Ctrl or Shift and click on each of the options.	
Buttons	Performs an action when clicked	
Signature Fields	A designated location to apply a Digital Signature to the document. Click on the field to place a signature	

Exporting Form Data

Form data can be exported from the current document into a file in FDF, XFDF, XDP, or XML formats. Form field data from all [Form Field Types](#) will be exported during this process.

Forms can be exported in the following formats

FDF: File format created by Adobe that is supported by most PDF applications

XFDF: Extended FDF file format created by Adobe that is supported by most PDF applications

XDP: An XML Data package created by Adobe that is supported by most PDF applications

XML: File format that is similar to an Excel file that will contain all of the annotation information

How to Export Form Data

1. From the menu, choose **Forms > Export Forms**
2. Select whether to export in FDF, XFDF, XDP, or XML format. This will display a save dialog.
3. Select the location and name of the file to export to and click Save

Importing Form Data

Form field data can be imported from either an FDF, XFDF, or XDP file into the current document. Any form data from any of the [Form Field Types](#) will be imported.

Note: *Form data can only be imported into the exact same form as it was exported from meaning that both the field type and name have to be exactly the same in order for the data to be imported.*

Comments can be imported using the following formats

FDF: File format created by Adobe that is supported by most PDF applications

XFDF: Extended FDF file format created by Adobe that is supported by most PDF applications

XDP: An XML Data package created by Adobe that is supported by most PDF applications

How to Export Annotations

1. From the menu, choose **Forms > Import Forms**
2. Select whether to import an FDF, XFDF, or XDP file. This will display a file chooser dialog.
3. Navigate to the location of the FDF, XFDF, or XDP file and then click Open

Resetting Form Fields

Reset Form Fields will reset the data in all fields in the form. When resetting a field, data will be set to the field's default value or to null if the field has no default value.

How to Reset Form Field Values

Select **Forms > Reset Fields** from the menu.

Note: *This cannot be undone. Make sure to save a copy before completing this action.*

Flattening Form Fields

Flatten Form Fields will flatten all fields in the form. Fields will be painted directly in the content page to which they belong and will not be editable anymore.

How to Flatten Form Fields

Select **Forms > Flatten Fields** from the menu.

Note: *This cannot be undone. Make sure to save a copy before completing this action.*

Highlighting Form Fields

PDF Studio can highlight all fields in the form, making them easier to locate. When highlighted a light colored box will be placed over each field within the document. This option is enabled by default but can be turned off or back on by doing the following.

Note: *Hidden fields will not be highlighted in the document. To view hidden fields you will need to be in [Creating PDF Forms](#) mode.*

How to Enable Highlighting Form Fields

Select **Forms > Highlight Fields** from the menu. The same step will toggle the field highlights off.

Creating Interactive PDF Forms

PDF Studio is capable of adding form fields in order to create an interactive PDF form or edit form fields in an existing PDF form.. Form fields are useful for when you have information that needs to be selected or filled out in a document. There are many different type of field options available in PDF Studio.

[Form Editing Mode](#): Starts the form editing mode to begin creating PDF forms

[Form Field Editor Toolbar](#): Tools available when creating and editing PDF forms

[Creating Form Fields](#): How to create and edit form fields

[Form Field Types](#): The available form field types and their functions

[Aligning Form Fields](#): How to align form fields in the document

[Custom Field Formatting](#): Setting custom formatting such as number, percentage, dates, zip codes, social security number in form fields



[Adding Calculations to Form Fields](#): How to add number calculations to form fields

[Editing Field Tab Order](#): How to edit the order of the fields when the Tab key is pressed

[Linking Form Fields](#): How to link fields together so that they share a value

Form Editing Mode

In order to create forms on a PDF you must first be in form editing mode. In form editing mode, most tools will be hidden and only navigation, form fields, properties, and alignment options will remain. Once the form is completed close the form editing mode to return to the viewing the document as normal.

- The object selection tool  on the toolbar can select one or more fields/annotations to move, align, or edit their properties. This tool is also available in the standard document view to allow for quick editing/moving of fields.
- The typewriter annotation  is included on this toolbar so that labels can be created in form editing mode. To make them permanent, [flatten](#) the typewriter annotations once the form has been created.

Starting/Stopping Form Editing Mode

1. Open any document in PDF Studio
2. On the menu bar select **Forms -> Create/Edit Form** or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac).
3. This will open up the [Form Field Editor Toolbar](#). In form editing mode, most toolbars will be hidden; navigation, form fields, properties, and alignment options will remain.
4. You can now edit the Create/Edit forms on the PDF document as needed.
 - **Note:** *If the document is protected or locked you will not be able to edit the form fields until they are unlocked*
5. Once complete click on Stop Form Editing to close the toolbar
6. Save the document and the fields will be ready for use

Form Field Editor Toolbar

The form field editor toolbar is enabled when in form editing mode. To start form editing mode and show the toolbar go to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). In form editing mode, most tools will be hidden and only navigation, form fields, properties, and alignment options will remain.



The default form editor toolbar is setup as displayed above but can be customized using one of the methods below:

Drag and Drop

To rearrange the tools on the toolbar using drag and drop, click on the divider line to the left of the tool group you wish to move, and then drag and drop it into new position. You can move any of the tool groups to any location on the toolbar. A third row can be created by dragging a tool group below the second row to create a third row.

You can also create a bottom toolbar by dragging the tools and dropping them on the bottom of the PDF Studio window

Floating Tools

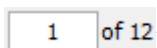
Tools can also be floated in other locations for easier access. To float any of the tools from the toolbar click on the divider line to the left of the tool group you wish to float and drag your toolbar out of the toolbar section and then drop it into new position not on the top or bottom toolbar to leave it floating. To return it back to the toolbar either drag it back to a location on the toolbar or click the "X" button and it will return to its last location on the toolbar.

Toolbar Descriptions

Navigation

First Page: Navigates to the first page of the document.

Previous Page: Navigates to the previous page in the document.



Page Number: Displays the current page being viewed and the total number of pages. Type a number into the field and press "Enter" to navigate directly to that page.

➤ **Next Page:** Navigates to the next page in the document.

➤ **Last Page:** Navigates to the Last page in the document.

🔍 **Previous View:** Navigates to the last view within the document.

🔍 **Next View:** Navigates to the next view within the document.

Page Fit



Actual Size: Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling.



Fit to Width: Scales the view to fit the width of the document in the PDF Studio frame.



Fit to Page: Scales the view to fit the entire document within the PDF Studio frame.

View Rotation



Rotate View Clockwise: Rotates only the view within the document clockwise (**Note:** *This rotation will NOT be saved when the document is saved then reopened*).



Rotate View Counter Clockwise: Rotates only the view within the document counter clockwise (**Note:** *This rotation will NOT be saved when the document is saved then reopened*).

Zoom



Zoom Out: Zoom out to view the content smaller.



Zoom To/Current Zoom: Displays the current zoom value. You can also select a preset zoom percentage or type in the field for a custom zoom value.



Zoom In: Zoom in to view the content larger.



Zoom Tool: Zooms to a selected area within a page. Click and drag to select the rectangle area you wish to zoom to.



Loupe Tool: Displays a zoom window that zooms in on the PDF to show the smallest detail.



Pan and Zoom: A window showing the portion of the page currently on screen. Drag the red box to adjust the view of the document.

Form Fields



Edit Interactive Objects: Used to edit interactive objects within the PDF which include annotations and form fields.



Text Box: Creates a text box field



Check Box: Creates a check box



Radio Button: Creates a radio button. To create a new group of Radio Buttons click on the down arrow ▼ to the right of the Radio Button on the toolbar and then select **New**. This will start a new group for the Radio Buttons.



Combo Box: Creates a combo box



List Box: Creates a list box



Button: Creates a push button



Signature: Creates a digital signature field



Typewriter: Creates a typewriter annotation.

Alignments




Align Left: Aligns the selected objects to the left.





Align Center: Aligns the selected objects to the center.




Align Right: Aligns the selected objects to the right.


 **Align Top:** Aligns the selected objects to the top.


 **Align Middle:** Aligns the selected objects to the middle.


 **Align Bottom:** Aligns the selected objects to the bottom.

 **Distribute Horizontally:** Evenly distributes the selected objects horizontally.

 **Distribute Vertically:** Evenly distributes the selected objects vertically.


 **Align Width:** Aligns the width of the selected objects.


 **Align Height:** Aligns the height of the selected objects.

 **Align Both:** Aligns both the width and the height of the selected objects.

Properties - Appearance

 **Fill Color:** Allows you to select the fill color of the selected objects.

 **Border Color:** Allows you to select the border color for the selected objects.

 **Line Width:** Sets the border line width for the selected objects.

 **Transparency:** Sets the transparency for the selected objects.

Stop Form Editing

 **Stop Form Editing:** Ends and closes the form editing mode

Creating Form Fields

PDF Studio can create form fields within PDF documents. In order to create fields first the form editor must be started then you can create fields using any of the two methods below.

Note: *When creating multiple fields at once you can enable "Sticky" mode to place multiple of the same field type at a time. To enable "Sticky" mode right click on the form icon on the toolbar and then select the "Sticky" option to toggle it on or off.*

Single Click

Fields can be created on the page using a standard size with just a single click.

Note: *To change the default form field size place one on the page and then resize to the default size you wish to use. Then Right Click (Ctrl + Click on Mac) and select Save as Default Size used for that specific field type going forward.*

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the [Form Field Type](#) you wish to create. The cursor will then change to show the field type currently selected
3. Using the mouse move to the location you want to place the field and then click to place the field

Click and Drag

Using Click and Drag allows you to create custom size fields on the page without having to resize them afterwards.

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the [Form Field Type](#) you wish to create. The cursor will then change to show the field type currently selected
3. Using the Top Left corner of the field move to the section on the page where the Top Left of the field should begin
4. Click and while holding down the mouse button drag the mouse to create the custom field size needed
5. Once complete release the mouse to place the field

Form Field Types

The following form field types are available when creating PDF forms in PDF Studio

Text box: Store text, numbers, dates, etc. Format the field for specific data types, or use in calculations

Check box: Select or deselect an option

Radio button: Select one of a group of mutually exclusive options

List box: Select one or more items from a list

Combo Box: Select one item from a list or add a value not in the list

Button: Starts an action, calculation, validation, etc

Signature: Apply a secure digital signature to a document

Form Text Box



PDF Studio is capable of creating text fields. Text fields are used when creating documents that will have sections that need to be filled out by typing in information. To create text fields follow the steps below.




Text Field

Creating Text Fields

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).

2. Click on the Text Field  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
4. Repeat steps 1-3 to create as many fields as you need
5. To finish placing text fields press Esc or click on the  button on the toolbar

Text Field Properties

To access the Text Field properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Text Field contains the following property settings.

Appearance

Name - The name of the field

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - Sets the font of the text

Size - Sets the font size of the text

Text Color - Sets the text color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Text Fields going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - When checked will display a red outline on the field letting them know the field is required

Visibility - Sets one of four visibility options for the field

- Show: the default setting makes the field visible
- Hide: hides the field from being displayed when viewing the document
- Show/Do not print: shows the field but will not print the field or its values
- Hide/Print: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options

Alignment - The alignment of the text that will be typed in the field

Default - The default value of the field. This is the value that will be displayed if the field is empty or when [Resetting Form Fields](#)

Multiline - Allows users to type using multiple lines

Scroll Long Text - When checked will scroll if the text being entered is longer than the field. Unchecking this will limit the text to the length of the field

Password - When checked will hide the text and display dots ••• instead of the text typed into the field

Character Limit - Limits the number of characters that can be entered in the field

Comb - Sets the number of vertical lines between each typed character. Useful when adding fields to forms that have a separate box for each character

Format

Sets the formatting rules for the field based on the option and settings selected. When a format is selected the formatting will be enforced using JavaScript and the user will not be able to enter any other value other than what is set in the rules. See [Field Formatting](#) for additional details.

None - Default value, sets no formatting rules and any text can be entered into the field

Number - Sets the field to only accept numbers based on the settings selected

Percentage - Sets the field to display a percentage based on the settings selected

Date/Time - Sets the field to only accept date, time, or date-time values based on the settings selected.

***Note:** When a date or date-time setting is selected when viewing the document PDF Studio will display a calendar button on the field. This button will allow users to select a date using a calendar picker instead of typing in the field if they wish.*

Other - Allows you to select from a list of common predefined field formatting rules

Custom - Allows you to create your own custom formatting rules using the supported [PDF Form JavaScript](#)

Calculate

Sets the calculation rules for the field based on the option and settings selected. When a calculate is set it will be enforced using JavaScript. See [Form Field Calculations](#) for additional details

No Calculation for this field - Default value, sets no calculation rules and any text can be entered into the field

Field value has simple calculation - When selected allows you to set a single math calculation on either all or a selection of fields.

This field has a custom calculation - When selected you will need to use [Form JavaScript](#) to create custom calculations

Simple Field Notation - When checked this allows you to use simple calculation commands (+ - / *) instead of JavaScript. See [Form Field Calculations](#) for additional details

Validate

Sets validation rules for the field based on the option selected. Validation is different from format in that validation restricts what values are allowed to be entered into the field

No validation for this field - Default value, sets no validation rules and any value can be entered into the field

Field values has a range - Only available when Format is set to a Number or Percentage.

This field has custom validation - When selected you will need to use [Form JavaScript](#) to create custom validations

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list



Remove - Removes the currently selected action from the list

Form Check Box


PDF Studio is capable of creating Check Boxes. Check Boxes are used to allow users to select either a single or multiple choice options on a PDF form.



Creating Check Boxes

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the Check Box  button located on the toolbar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
4. Repeat steps 1-3 to create as many fields as you need
5. To finish placing Check Boxes press Esc or click on the  button on the toolbar

Check Box Properties

To access the Check Box properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Check Box contains the following property settings.

Appearance

Name - The name of the field

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - This field is disabled as a specific font has to be set for the check boxes to work

Size - Sets the size of the check mark symbol

Text Color - Sets the check mark color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Check Boxes going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - When checked will display a red outline on the field letting them know the field is required

Visibility - Sets one of four visibility options for the field

- Show: the default setting makes the field visible
- Hide: hides the field from being displayed when viewing the document
- Show/Do not print: shows the field but will not print the field or it's values
- Hide/Print: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options

Button Style - Sets the symbol to be used when the button is checked

Export Value - The value to be exported when the field is checked

Selected by Default - Sets the default value of the field to checked or unchecked

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list




Remove - Removes the currently selected action from the list

Form Radio Button


PDF Studio is capable of creating Radio Buttons. Radio Buttons are used to allow users to select either a single option from a list of options in a PDF form. Radio buttons are created in groups. This is because radio buttons are used when only one option from the list should be selected. If another option in the same radio button group is selected then the other option will be unselected. By default PDF Studio will make all Radio Buttons that are created part of the same group.



Creating Radio Buttons

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the Radio Button  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
 - To create a new group of Radio Buttons click on the small down arrow  to the right of the Radio Button on the toolbar and then select **New**. This will create a new group for the Radio Buttons.
 - If you need to go back to a previous group click on the small arrow to the right of the Radio Button and select the group you wish to create more Radio buttons for
4. Repeat steps 1-3 to create as many fields as you need
5. To finish placing Radio Buttons press Esc or click on the  button on the toolbar

Radio Button Properties

To access the Radio Button properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Radio Button contains the following property settings.

Appearance

Name - The name of the radio button group. All radio buttons containing the same name will be a part of the same group.

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - This field is disabled as a specific font has to be set for the Radio Buttons to work

Size - Sets the size of the checked button symbol

Text Color - Sets the check mark color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Radio Buttons going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - When checked will display a red outline on the field letting them know the field is required

Visibility - Sets one of four visibility options for the field

- **Show**: the default setting makes the field visible
- **Hide**: hides the field from being displayed when viewing the document
- **Show/Do not print**: shows the field but will not print the field or it's values
- **Hide/Print**: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options

Button Style - Sets the symbol to be used when the button is checked

Radio Button Choice - This defines the choice number for the radio button group

Selected by Default - Sets the default value of the field to checked or unchecked

Border Shape - Sets the shape of the border for the radio button to either a circle or square

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list



Remove - Removes the currently selected action from the list

Form Combo Box


PDF Studio is capable of creating Combo Boxes (drop down fields). Combo Boxes are used to allow users to select an option from a list of available text options from a drop down menu. If set, users can also be allowed to enter their own custom value.

Option 1 ▼

Creating Combo Boxes

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the Combo Box  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
4. The Combo Box Properties dialog will then be displayed so that you can add the options to the list as it will initially be blank.
5. Click on the Options tab
6. Type in each of the options that you wish to add in the Item field and then click on Add or press Enter on your keyboard. Your new item will be displayed in the list below. Continue adding all the items that you need and once complete click on OK to set the list options
7. Repeat steps 1-6 to create as many fields as you need
8. To finish placing Combo Boxes press Esc or click on the  button on the toolbar

Combo Box Properties

To access the Combo Box properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Combo Box contains the following property settings.

Appearance

Name - The name of the field

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - Sets the font of the text

Size - Sets the font size of the text

Text Color - Sets the text color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Combo Boxes going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - When checked will display a red outline on the field letting them know the field is required

Visibility - Sets one of four visibility options for the field

- Show: the default setting makes the field visible
- Hide: hides the field from being displayed when viewing the document
- Show/Do not print: shows the field but will not print the field or it's values
- Hide/Print: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options


Item - Type the name of the item you would like to add to the combo list


Add - Adds the text in the Item field to the combo list

Export Value - The value to be exported when the Item is selected in the combo box

Default - When checked, this will make the selected option the default value of the field. This is the value that will be displayed if the field is empty or when [Resetting Form Fields](#)

 **Delete** - Deletes the selected items from the list

 **Move Up** - Moves the selected item up the list

 **Move Down** - Moves the selected item down the list

Allow Custom Text - When checked, allows the user to enter custom text in the field. Otherwise, the user must select an option

Sort Items - Will alphabetically sort all of the items in the list

***Note:** This cannot be undone after it has been sorted you will need to manually resort the items*

Commit Selected Immediately - When using [Form Field Calculations](#) this will submit the value to the calculation (if set) immediately. Otherwise, it will need to be triggered using another method.

Format

Sets the formatting rules for the field based on the option and settings selected. When a format is selected the formatting will be enforced using JavaScript and the user will not be able to enter any other value other than what is set in the rules. See [Field Formatting](#) for additional details.

None - Default value, sets no formatting rules and any text can be entered into the field

Number - Sets the field to only accept numbers based on the settings selected

Percentage - Sets the field to display a percentage based on the settings selected

Date/Time - Sets the field to only accept date, time, or date-time values based on the settings selected.

Note: *When a date or date-time setting is selected when viewing the document PDF Studio will display a calendar button on the field. This button will allow users to select a date using a calendar picker instead of typing in the field if they wish.*

Other - Allows you to select from a list of common predefined field formatting rules

Custom - Allows you to create your own custom formatting rules using the supported [PDF Form JavaScript](#)

Calculate

Sets the calculation rules for the field based on the option and settings selected. When a calculate is set it will be enforced using JavaScript. See [Form Field Calculations](#) for additional details

No Calculation for this field - Default value, sets no calculation rules and any text can be entered into the field

Field value has simple calculation - When selected allows you to set a single math calculation on either all or a selection of fields.

This field has a custom calculation - When selected you will need to use [Form JavaScript](#) to create custom calculations

Simple Field Notation - When checked this allows you to use simple calculation commands (+ - / *) instead of JavaScript. See [Form Field Calculations](#) for additional details

Validate

Sets validation rules for the field based on the option selected. Validation is different from format in that validation restricts what values are allowed to be entered into the field

No validation for this field - Default value, sets no validation rules and any value can be entered into the field

Field values has a range - Only available when Format is set to a Number or Percentage.

This field has custom validation - When selected you will need to use [Form JavaScript](#) to create custom validations

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

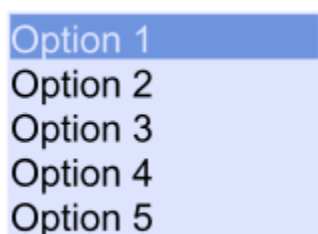
Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list


Remove - Removes the currently selected action from the list

Form List Box

PDF Studio is capable of creating List Boxes. List Boxes are used to allow users to select an option from a list of available text options from a scrollable window within the PDF document.




Creating List Boxes

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the List Box  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
4. The List Box Properties dialog will then be displayed so that you can add the options to the list as it will initially be blank.
5. Click on the Options tab
6. Type in each of the options that you wish to add in the Item field and then click on Add or press Enter on your keyboard. Your new item will be displayed in the list below. Continue adding all the items that you need and once complete click on OK to set the list options
7. Repeat steps 1-6 to create as many fields as you need

8. To finish placing List Boxes press Esc or click on the  button on the toolbar

List Box Properties

To access the List Box properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The List Box contains the following property settings.

Appearance

Name - The name of the field

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - Sets the font of the text

Size - Sets the font size of the text

Text Color - Sets the text color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new List Boxes going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - This option is not available on List Boxes

Visibility - Sets one of four visibility options for the field

- Show: the default setting makes the field visible
- Hide: hides the field from being displayed when viewing the document

- **Show/Do not print:** shows the field but will not print the field or its values
- **Hide/Print:** hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options


Item - Type the name of the item you would like to add to the List Box list


Add - Adds the text in the Item field to the List Box list

Export Value - The value to be exported when the Item is selected in the List box

Default - When checked, this will make the selected option the default value of the field. This is the value that will be displayed if the field is empty or when [Resetting Form Fields](#)

 **Delete** - Deletes the selected items from the list

 **Move Up** - Moves the selected item up the list

 **Move Down** - Moves the selected item down the list

Allow Multi Select - When checked, allows the user to select multiple options using either Shift or Ctrl + Click

Sort Items - Will alphabetically sort all of the items in the list

Note: *This cannot be undone after it has been sorted you will need to manually resort the items*

Commit Selected Immediately - When using [Form Field Calculations](#) this will submit the value to the calculation (if set) immediately. Otherwise, it will need to be triggered using another method.

Selection Change

Allows you to set an action to occur when a selection is changed. Only JavaScript can be used when setting change actions.

Do nothing on selection change - Default value, sets no validation rules and any value can be entered into the field

Do custom script on selection change - When selected you will need to use [Form JavaScript](#) to create custom validations

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list


Remove - Removes the currently selected action from the list


Form Button

PDF Studio is capable of creating Push Buttons. Push Buttons allow you to create custom buttons on the PDF document that will perform an action when pressed. PDF Studio does include some basic actions that can be added without any coding required. For more advanced options you can program the actions using JavaScript. You will need to have advance knowledge in programming JavaScript in order to create the actions for the buttons. For more information regarding JavaScript in PDF Studio see [Supported JavaScript in PDFStudio](#)




Creating Buttons

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the Button  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.

4. The Button Properties dialog will then be displayed so that you can add the action to the button as it will initially do nothing.
5. Click on the Actions tab
6. Click on Add to create an action for the button. See [Form Field Actions](#) for a list of available actions and their options
7. Once the actions have been added click on OK to set the actions
8. Repeat steps 1-7 to create as many fields as you need
9. To finish placing Buttons press Esc or click on the  button on the toolbar

Button Properties

To access the Button properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Button contains the following property settings.

Appearance

Name - The name of the radio button group. All radio buttons containing the same name will be a part of the same group.

Tooltip - The tip that is shown when the mouse is hovered over the field

Style

Font - This field is disabled as a specific font has to be set for the Radio Buttons to work

Size - Sets the size of the checked button symbol

Text Color - Sets the check mark color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Radio Buttons going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - This option is not available on List Boxes

Visibility - Sets one of four visibility options for the field

- Show: the default setting makes the field visible
- Hide: hides the field from being displayed when viewing the document
- Show/Do not print: shows the field but will not print the field or it's values
- Hide/Print: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Options

Style - Sets the style of the button

- None: The button will have no effect when pushed
- Invert: The entire button will highlight when pressed
- Outline: Only the outline of the button will be highlighted when pressed. Change to a larger line width to see it more
- Push: Allows you to define separate labels for each of the below interactions with the button
 - Up: when the button is not being acted on
 - Down: when the button is pressed
 - Mouse Over: When the mouse is hovered over the button

Label - Sets whether the button has a label and it's location

Image - Sets whether the button has an image in the background and it's location

Note: *Any of the supported image formats (JPEG, PNG, GIF, & TIFF) or a PDF document can be set as the image on the button*

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.

Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list



Remove - Removes the currently selected action from the list

Form Signature Field


PDF Studio is capable of creating Signature Fields. Signature Fields allow you to create fields that your users can use to digitally sign the PDF document. See [Applying Digital Signatures](#) for instructions on how to sign a document.



Creating Signature Fields

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Click on the Signature Field  button located on the tool bar. The cursor will then change to show a preview of the field
3. Using the mouse move to the location you want to place the field and then click to place the field or click and drag to create a custom field size.
4. The Signature Field Properties dialog will then be displayed so that you can add the options to the list as it will initially be blank.
5. Click on the Options tab
6. Type in each of the options that you wish to add in the Item field and then click on Add or press Enter on your keyboard. Your new item will be displayed in the list below. Continue adding all the items that you need and once complete click on OK to set the list options
7. Repeat steps 1-6 to create as many fields as you need
8. To finish placing Signature Fields press Esc or click on the  button on the toolbar

Signature Field Properties

To access the Signature Field properties right click (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#). The Signature Field contains the following property settings.

Appearance

Name - The name of the signature field

Style

Font - Sets the font of the text used in the digital signature once it is applied

Size - This option does not apply to signature fields

Text Color - Sets the text color

Border Color - Sets the color of the border

Line Width - Sets the width of the border line

Fill Color - Sets the fill color

Style - Sets the style for the border line (i.e. dotted, dashed, cloud, etc...)

Save as default - When checked this will make the selected style settings the default for any new Signature Fields going forward

Properties

Rotation - Sets the field rotation in 90 degree increments

Required - This option is not available on Signature Fields

Visibility - Sets one of four visibility options for the field

- **Show**: the default setting makes the field visible
- **Hide**: hides the field from being displayed when viewing the document
- **Show/Do not print**: shows the field but will not print the field or it's values
- **Hide/Print**: hides the field but the field and its value will be printed

Read Only - Makes the field uneditable and will just display the value currently set in the field

Signed

Allows you to set an action to occur when the field is signed. Only JavaScript can be used when setting change actions.

Do nothing on sign - Default value, sets no validation rules and any value can be entered into the field

Do custom script on sign - When selected you will need to use [Form JavaScript](#) to create custom validations

Actions

The Action Panel displays a list of the current actions associated with the field. Actions can be added, edited, or deleted using the buttons below the actions list.


Add - Adds a custom [Form Field Actions](#) from a list of available actions.

Edit - Edits the currently selected action from the list

Remove - Removes the currently selected action from the list

Moving & Resizing Form Fields

Form fields can be resized after they have been created if needed.

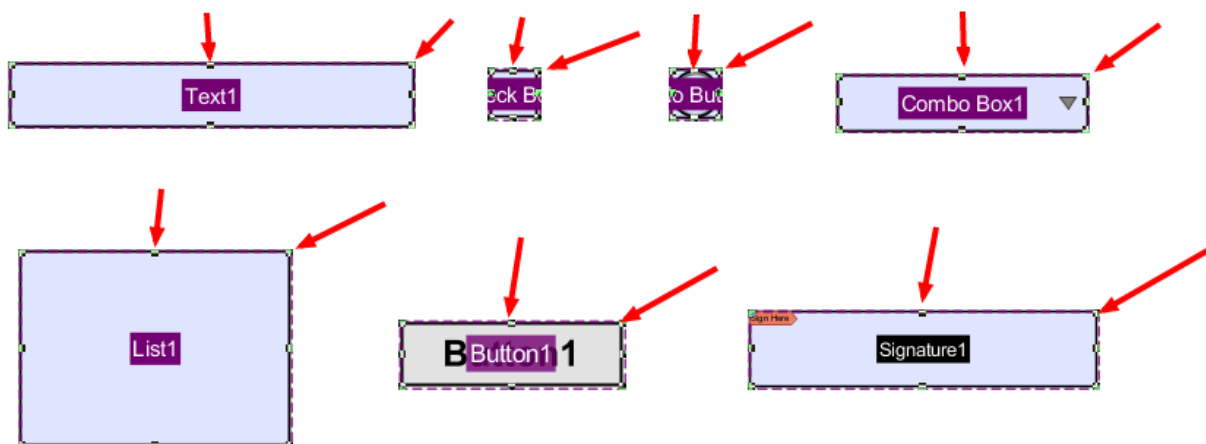
1. Click on the Object Selection icon  on the toolbar, then click with the mouse to select the desired object.
 - **Note:** *More than one form field can be selected at a time*

Move

Click on the form field and drag it to its new location on the page.

Resize


Use the black dots on the corners and edges to resize the shape of the box so that it fits the area that you need.




Aligning Form Fields

Form fields can be aligned or evenly distributed on the page if needed. Form fields can be aligned using any of the below methods. Two or more form fields must be selected in order to use the alignment tools.

From the Toolbar

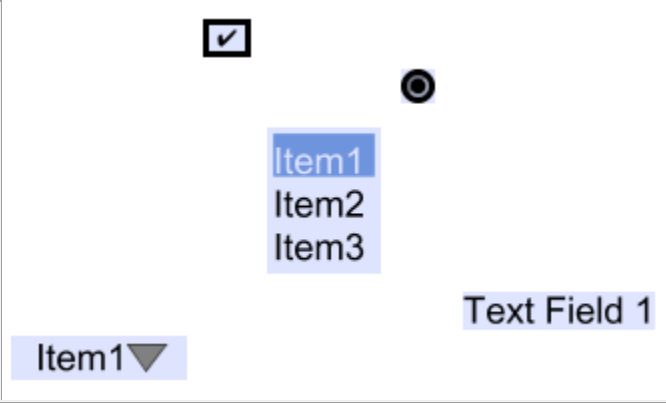
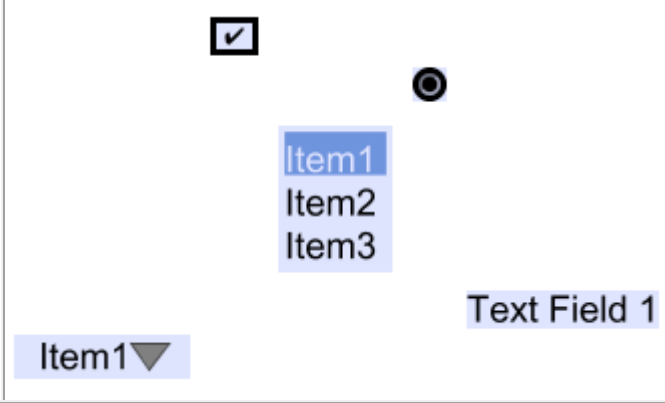

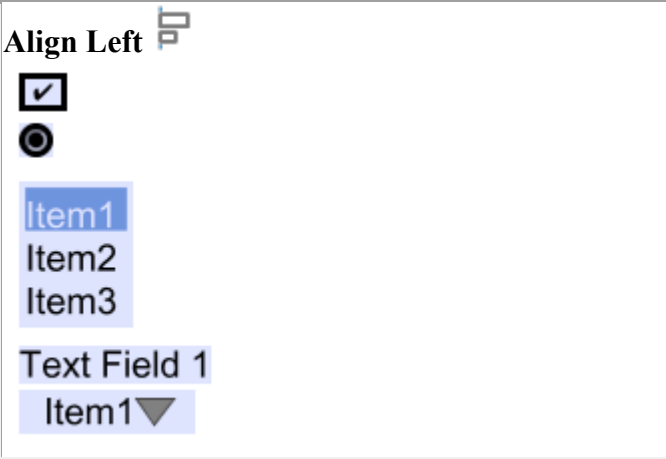

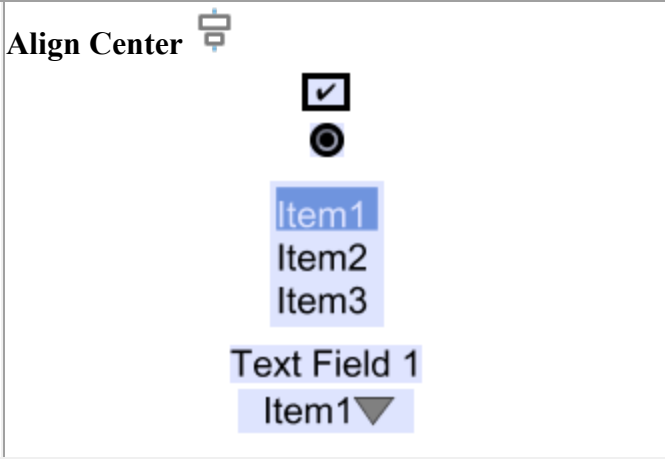


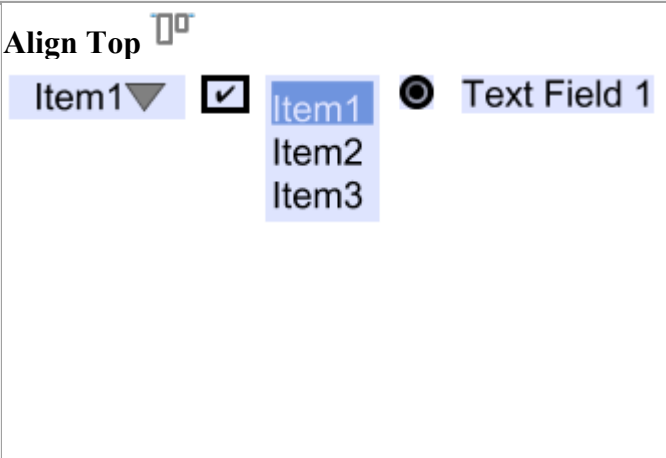

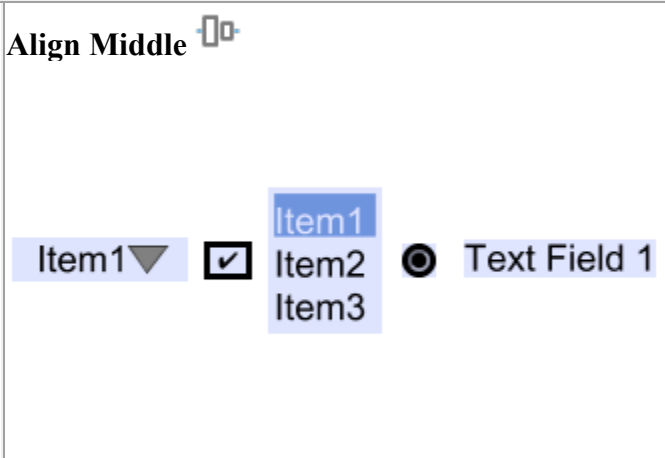




1. Using the Object Selection Tool  Select the form fields that you wish to align.
2. Click the button on the toolbar to align the fields

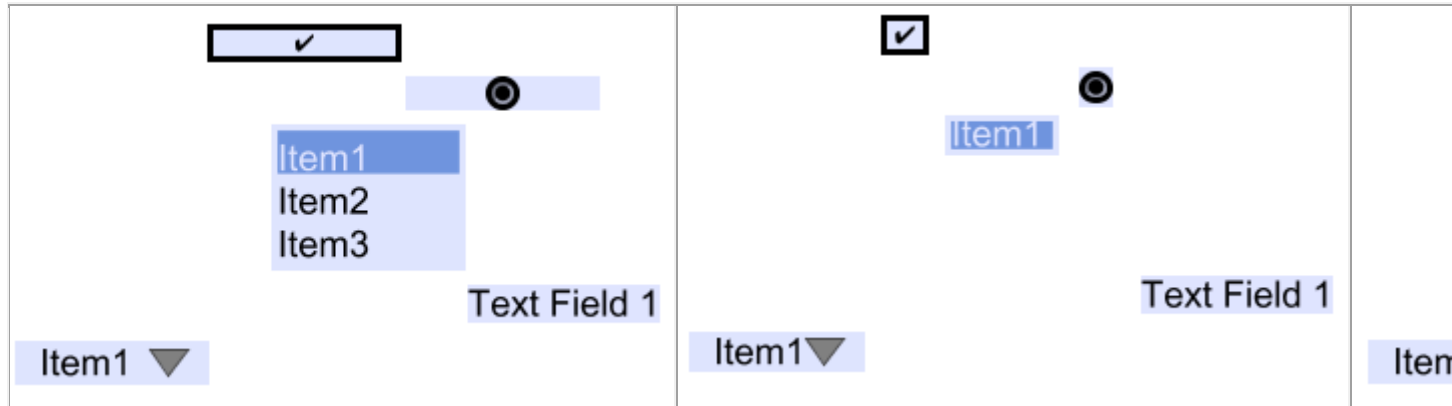
From Right Click Context Menu

1. Using the Object Selection Tool  Select the form fields that you wish to align.
2. Right click, (Mac: Ctrl + Click) on any of the selected form fields and go to Alignment and select the alignment you wish to perform

Alignment Examples

Original	Distribute Horizontally 	Distribute Vertically 
----------	---	---

		
Align Left  	Align Center  	Align Right 
Align Top  	Align Middle  	Align Bottom 
Align Width 	Align Height 	Align Baseline 




Form Field Formatting

When creating or editing a form field, it is possible to define formatting rules which are enforced through JavaScript. Field Formatting allows you to define how the values or text within a field will be displayed. For Example: Making currency always show 2 decimal places or a date that shows a 2 digit month, day, and year.

Note: *Formatting options are only available for [text boxes](#) and [combo boxes](#).*

Setting Custom Field Formatting

1. Access the field properties by right clicking (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#).
2. Click on the Format Tab
3. Set the options below to be applied to the selected field

Field Formatting Options

None - Default value, sets no formatting rules and any text can be entered into the field

Number - Sets the field to only accept numbers based on the settings selected

- Decimal Places: number of decimal places to use
- Separator Style: separators to use for thousands and decimal places
- Currency Symbol: currency symbol to be used
- Symbol Placement: the location of the currency symbol

- **Negative Number Style:** the style of the text when the value is a negative number
 - Use red text: turns the negative number red
 - Use parenthesis: puts the negative number inside parenthesis

Percentage - Sets the field to display a percentage based on the settings selected

- **Decimal Places:** number of decimal places to use
- **Separator Style:** separators to use for thousands and decimal places

Date/Time - Sets the field to only accept date, time, or date-time values based on the settings selected.

- **Options List:** Select any of the predefined date/time formats that come with PDF Studio
- **Custom:** Create your own custom date/time format using the below date/time codes
 - yyyy = four-digit year
 - yy = two-digit year
 - mm = two-digit month (01=January, etc.)
 - mmm = three letter month abbreviation (Jan=January, etc.)
 - mmmm = full month name
 - dd = two-digit day of month (01 through 31)
 - HH = two digits of hour (00 through 23) (AM/PM NOT allowed)
 - MM = two digits of minute (00 through 59)
 - ss = two digits of second (00 through 59)
 - h = two digit hour using 12-hour AM/PM format
 - tt = displays AM/PM based on the time

Note: *When a date or date-time setting is selected when viewing the document PDF Studio will display a calendar button on the field. This button will allow users to select a date using a calendar picker instead of typing in the field if they wish.*

Other - Allows you to select from a list of common predefined field formatting rules

- **US Zip Code:** standard 5 digit US zip code
- **US Zip Code + 4:** standard 5 digit US zip code plus the additional 4 digit geographic segment
- **US Phone Number:** US phone number format (XXX) XXX-XXXX
- **US Social Security Number:** US social security number format XXX-XX-XXXX
- **Custom:** set a custom format using the below letter codes
 - 9 to allow numbers
 - A to allow letters
 - O (the letter) to allow numbers and letters
 - X to allow printable characters

Custom - Allows you to create your own custom formatting rules using the supported [PDF Form JavaScript](#)

Sample Format Examples

Date/Time

- Year: yyyy (eg 1997)
- Year and month: yyyy-mm (eg 1997-07)
- Complete date: yyyy-mm-dd (eg 1997-07-16)
- Complete date plus hours and minutes: yyyy-mm-dd HH:MM (eg 1997-07-16 19:20)

Other -> Custom



- A phone number in France such as "05 44 06 72 25" would be represented by the following custom format: "99 99 99 99 99"
- A phone number in Sweden such as "46 71 123 456" would be represented by the following custom format: "99 99 999 999"
- A seat on a flight such as "99C" would be represented by the following custom format: "99A"

Form Field Calculations

PDF Studio is capable of creating PDF forms with custom calculations. You have the ability to use some of the preset simple calculations or advanced custom calculations using JavaScript. This is very useful for when you want values entered into a form calculated automatically. For example: summing up a total on an invoice sheet to give to a customer.

Adding Calculations to Forms

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
 - **Note:** *Make sure to create all of the Fields that you need in the document first. For more information regarding on how to create Fields see [Creating Text Fields](#). Also, Make sure that you have correctly named all of the Form Fields in your document to make it easier to setup the calculations*

2. Using the Object Selection Tool  select the Field that you would like to perform the calculation
3. Access the field properties by right clicking (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#).
4. In the Properties window select the Calculate tab
5. Use this screen to set any of the Form Field Calculation Options listed below. Once you have completed setting your calculations click on OK
6. Repeat steps 2- 5 to create as many fields with calculations as you need.
7. Once all calculations are complete click on the Stop Form Editing button on the toolbar to close the form editor and save the document
8. The Form Calculations will now be ready for you to use

Form Field Calculation Options

No Calculation for this field

Default value, sets no calculation rules and any text can be entered into the field

Field value has simple calculation

When selected this option allows you to set a single math calculation on either all or a selection of fields. To Setup a simple calculation follow the steps below

1. Select the option for “Field value has a simple calculation:”
2. Then select the type of calculation you would like from the drop down menu. You have the below options available for simple calculations:
 - Sum (+) – adds the fields together
 - Product (x) – multiplies the fields together
 - Average – returns the average value of all the fields
 - Minimum – Returns the lowest value from all the fields
 - Maximum – Returns the highest value of all the fields
3. Select the fields from the list you would like to be included in the calculation. To select more than one field from the list either click and drag the mouse or hold Ctrl and click the fields that you need from the list. **Only highlighted fields will be used in the calculation.**
 - **Note:** *(You can also select other fields such as Combo or List Boxes to be used in calculations)*

This field has a custom calculation

The Custom Calculation allows you to perform more advanced calculations using JavaScript. You will need to have advance knowledge in programming JavaScript in order to create the calculations. For more information regarding using JavaScript in PDF Studio see [PDF Form JavaScript](#).

Select the option “This field has a custom calculation:” and then type in the JavaScript calculation that you would like to perform.

Simple Field Notation

Simple field notation allows you to use simple calculation commands (+ - / *) instead of JavaScript. For Example to add Text1 to Text 2 you would type "Text1 + Text2". Once complete PDF Studio will convert the simple annotation into JavaScript that is compatible with the PDF format.

1. Select the option “This field has a custom calculation:” and check the box for "Simple Field Notation"
2. Then use the custom calculation field to enter your calculations.

Note: *When creating custom calculations the field name must exactly match the name set in the field properties in order for the calculation to work.*

The following math functions are available:


- **+**: adds the two fields
- **-**: subtracts the two fields
- **x**: multiplies the two fields together
- **/**: divides the two fields
- **()**: groups the equations within the parenthesis as a separate function


Form Field Validation

Form field validation sets validation rules for the field based on the option selected. Validation is different from format in that validation restricts what values are allowed to be entered into the field

Note: *Field validation settings are only available for text and combo boxes.*

Adding Validation to Fields

1. Start the Form Editing Mode by going to **Forms -> Create/Edit Form** on the menu or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac). This will open up the [Form Field Editor Toolbar](#).
2. Using the Object Selection Tool  select the Field that you would like to add validation to

3. Access the field properties by right clicking (Mac: Ctrl + Click) on the field and choose Properties in the mouse menu or click on the edit button  on the [Mini Toolbar](#).
4. In the Properties window select the Validate tab
5. Use this screen to set any of the Form Field Validation Options listed below. Once you have completed setting your validation click on OK
6. Repeat steps 2- 5 to set as many fields with validations as you need.
7. Once all validations are set click on the Stop Form Editing button on the toolbar to close the form editor and save the document
8. The Form Validations will now be ready to use

Form Field Validation Options

No validation for this field

Default value, sets no validation rules and any value can be entered into the field

Field values has a range

Only available when Format is set to a Number or Percentage.

This field has custom validation

When selected you will need to use [Form JavaScript](#) to create custom validations

Form Field Actions

PDF Studio has the available actions that can be added to form fields. For form fields you must set both an Event and Action to be used.

Events

Mouse Up: When the mouse button is released

Mouse Down: When the mouse button is pressed

Mouse Entered: When the mouse cursor enters the field boundary (not clicking, just hovering)

Mouse Exited: When the mouse cursor exits the field boundary (not clicking, just hovering)

On Blur: When the field has lost focus and is no longer active (i.e. clicking else where or tabbing to the next field)

On Focus: When the field has gained focus and is now active (i.e. clicking on or tabbing to the field)

Actions

Go to a page in this document

Sets the link to go to a page within the current document

- Page Number - the page number of the document to link to
- Zoom - Set the page fit when navigating to the page
- Percent - The zoom level for Custom zoom setting
- Set Visually - Allows you to set the location of the link visually

Go to a page in another document

Sets the link to go to a page within a different designated document

- Page Number - the page number of the document to link to
- Document - The full path to the document to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: *When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a File Attachment instead.*

Show/Hide Fields

Sets the link to either Show or Hide selected fields within the document

- Show - Will show the selected fields when clicked
- Hide - Will hide the selected fields when clicked
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields

Open File

Sets the link to open a specific file.

- File - The full path to the file to open. Click on the "..." button to open a file chooser and navigate to the file you wish to select.

Note: *When sending this document to other users this action may not work if the file is not in the same location on the users computer. To make sure the file is included with the PDF when sending to another user try using a File Attachment instead.*

Open a web link

Set's the link to open a specific web page or start an email. Examples of valid links:

- <http://www.qoppa.com>
- <ftp://ftp.site.com>
- <file:c:\qoppa\temp.txt>
- <mailto:johndoe@gmail.com>

Reset Form Fields

Sets the link to reset the selected fields within the document

- All Fields - When checked will reset all the fields within the document
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields

JavaScript Action

Sets the link to perform a custom [Supported JavaScript](#) action that can be typed into the field.

Submit Form

Sets the link to send the form field values to a designated location in one of 4 formats. This can be used to have an automatic way to send back forms or values once a user has completed the form.

- URL - The destination to send the selected file to. Examples of valid links:
 - <http://www.qoppa.com>
 - <ftp://ftp.site.com>
 - <file:c:\qoppa\temp.txt>
 - <mailto:johndoe@gmail.com>
- FDF - Sends an FDF file containing the selected field values
- XFDF - Sends an XFDF file containing the selected field values
- PDF - Sends a copy of the entire PDF
- HTML - Sends an HTML file containing the selected field values
- Fields - Sets the options when sending the field values

- All Fields - Will send all fields regardless of value
- Include - Will include the selected fields in the list when sending the file
- Exclude - Will exclude the selected fields in the list when sending the file
- Field List - Displays a list of the fields in the document to select. To select more than one field use Ctrl + Click to select separate fields or Shift + Click to select a group of fields
- Send Empty Fields - When checked will send the selected fields values even when fields are empty

Show/Hide Layers

Sets the link to either Show or Hide selected layers within the document

- Use Current Visibility - Sets the action to display the layers as they are currently being displayed so that if layers are turned off later they will return to the current state
- Other - Sets a new action for the layer using the below options
 - Show - Will show the selected layers in the list
 - Hide - Will hide the selected layers in the list
 - Toggle - Will switch the selected layer(s) state from hidden to displayed or displayed to hidden depending on the layers current state
 - Layers List - Displays a list of the layers in the document to select. To select more than one layer use Ctrl + Click to select separate layers or Shift + Click to select a group of layers

Named Action

Sets the link to perform one of standard predefined actions listed below.

- NextPage - Goes to the next page in the document
- PrevPage - Goes to the previous page in the document
- FirstPage - Goes to the first page in the document
- LastPage - Goes to the last page in the document
- Print - Starts the print dialog to print the current document
- Save - Saves the current document
- Open - Displays the open file dialog

Editing Field Tab Order

PDF Studio allows you to set the tab order of fields within a document. This allows you to designate what field comes next when the user is tabbing through the document to make it easier to complete. Follow the instructions below to rearrange the field tab order in a PDF form.

Note: *By default the tab order is created in the order that the fields are created. It's usually best practice to either create the fields in the correct order or rearrange them afterwards as many users will be confused if they are taken to a completely different section of the page.*

Changing the Field Tab Order

1. Open the document you wish to edit in PDF Studio
2. On the menu bar select **Forms -> Create/Edit Form** or use the shortcut keys Ctrl + Alt + M (Command + Alt + M on Mac).
3. This will start the [Form Editing Mode](#)
4. On the left hand side of the PDF Studio frame will be the Fields Pane
 - **Note:** *You may need to click on the "Fields" button to open the pane*
5. In this pane you will see a list of all the fields per page within the document. To field tab order in the document goes from the top of the field tree to the bottom of the field tree. To edit the field tab order drag and drop the items into the order that you want the fields to tab starting with the first at the top and the last at the bottom of the list.
6. Once complete click on Stop Form Editing to close the tool bar
7. Save the document and the fields will be ready for use

Linking Form Fields

PDF Studio allows you to link multiple form fields in a document together. Linking one or more fields together makes the same data populate each instance of the field within the document. This is helpful for putting dates or client names on every page of the document.

Note: *Only fields of the same type can be linked together.*

How to Link Form Fields

1. First create the form fields that you need in your document. For more information on creating form fields see [Creating Form Fields](#)
2. To link the fields all you need to do is give each of the fields the same name either when creating them or by editing them.
3. Once you click **OK** to confirm the field name setting you will get a message asking if you would like to link the fields. Click on OK to save the field name and link the fields
4. Repeat steps 1-3 to link as many form fields as you need.
5. Once complete click on the Stop Form Editing button on the toolbar to close the form editor and save the document
6. The fields will now be ready for you to begin typing in information

Note: *Radio buttons can be grouped in a similar way, by giving them the same name, you will also have to make sure the Radio Button Choice under the Options tab is also labeled the same.*

PDF Form JavaScript

In PDF Studio when creating custom functions/actions for specific items such as form fields or buttons you will need to use JavaScript for the commands. JavaScript can perform calculations, button actions (adding images, submitting forms, or populating other fields), validate field input, and set field formatting, among many other things.

Note: *PDF Studio only supports Acroform (non-LiveCycle) JavaScript in PDF forms.*

You will need to have advance knowledge in programming JavaScript in order to create the actions for the buttons. For additional details on how to use these functions, take a look at the tutorials and lessons on this site http://www.w3schools.com/js/js_intro.asp

PDF Studio supports the following JavaScript commands for each of the below items.

Supported JavaScript

Document

Methods:

- addField
- calculateNow
- getAnnots3D
- getField
- getNthFieldName
- getOCGs
- resetForm

Properties:

- calculate
- numFields
- numPages
- URL

Fields

Methods:

- buttonGetCaption
- buttonImportIcon
- buttonSetCaption
- checkThisBox
- clearItems
- deleteItemAt
- getArray
- getItemAt
- insertItemAt
- isBoxChecked
- setAction
- setFocus
- setItems

Properties:

- borderColor
- borderStyle
- borderWidth

calcOrderIndex
charLimit
comb
commitOnSelChange
currentValueIndices
defaultValue
delay
display
doc
doNotScroll
doNotSpellCheck
editable
exportValues
fileSelect
fillColor
hidden
lineWidth
multiline
multipleSelection
name
numItems
page
password
readonly
required
strokeColor
style
submitName
textColor
type
userName
value
valueAsString

Global

Methods:

setPersistent

OCG

Methods:

getIntent
setAction
setIntent

Properties:

initState
locked
name
state

Utilities

Methods:

printf
printf
printf

Digital Signatures

PDF Studio supports both adding a digital signature field to a PDF or applying digital signatures to existing fields. Digital Signatures are a way of authenticating the contents of a document. A document with a valid signature is guaranteed not to have been changed since being signed.

[Create Digital Signature Fields](#) **Pro**: Create new unsigned digital signature fields

[Modifying Digital Signature Fields](#) **Pro**: Modify existing field including clearing, moving, and properties

[Applying Digital Signatures](#) **Pro**: How to apply digital signatures to a document

[Creating Self-Signed Digital IDs](#) **Pro**: Creating digital IDs within PDF Studio to be used when signing documents

[Importing Digital IDs](#) **Pro**: Importing an existing or third-party digital ID to be used when signing documents

[Digital Signature Options](#) **Pro**: Options available when digitally signing a PDF

[Digital Signature Appearance](#) **Pro**: Appearance settings when applying a digital signature

[Validate Digital Signatures](#) **Pro**: How to validate a digital signature

[Trusting Digital Signatures](#): How to add a digital signature to your trusted certificates

[Manage Trusted Certificates](#): Manage the trusted certificate options

[Manage Digital IDs](#) **Pro**: Create, edit, and remove digital IDs


[Managing Timestamp Servers](#) **Pro**: Manage the timestamp servers that are used when digitally signing PDFs

Creating Digital Signature Fields

PDF Studio can create new, unsigned digital signature fields in a document. This is can be used to create a document that requires a signature and to add a signature field so that a digital signature can be applied.



How to Create a Digital Signature Field

1. Open a document to add a digital signature field to
2. Click on the Digital Signature button  on the toolbar or go to **Security -> Add Signature Field** on the menu bar
3. When the tool is started, the cursor will become a crosshair to mark the location for the new field on the document. Drag a rectangle to create the desired signature field size
4. After the field is created, a signature can be immediately applied or the field can be clicked on to apply a digital signature.

Note: *To create a signature field using the form editing mode instead see how to add a [Form Signature](#) field.*

Modifying Digital Signature Fields

Signature fields can be modified using any of the available options below. The options will vary depending on whether the digital signature field has been signed.

To access the digital signature field options Right Click (Ctrl + Click on Mac) on the field and then a mouse context menu will be displayed showing the available options. Any text that has been greyed out is a disabled option.

Unsigned Digital Signature Fields

The Following options are available for an unsigned digital signature field.

Apply Signature - Starts the [Applying Digital Signatures](#) dialog

Apply Certifying Signature - Starts the [Applying Digital Signatures](#) dialog except with the certifying signature option already selected

Move - Allows you to move or resize the unsigned field on the page. When finished click anywhere on the page or pres Esc to finish editing.

- **Move:** click on the signature field and drag it to its new location on the page.
- **Resize:** use the black dots on the corners and edges to resize the shape of the box so that it fits the area that you need.

Properties - Displays the properties dialog for the field. See [Form Signature Field](#) for a description of the available properties

Delete - Deletes the selected signature field

Details - Displays the details for the signature field.

Note: *When unsigned this will just display a "Signature field has not been signed" message as there are no details to display.*

Signed Digital Signature Fields

The following options are available for signed digital fields

Clear Signature - Removes the signature from the signature field

Details - Displays the details for the signature field to help in [Validating a Digital Signature](#)

Creating Self-Signed Digital IDs

In order to sign documents, you must first have a digital ID. If you do not have an existing ID you can use PDF Studio to create a new digital ID to be used when signing documents. When

creating a digital ID with PDF Studio it is considered a Self-Signed Digital ID which means that it is not using a third-party to validate the signature.

Note: *When creating a Self-Signed Digital ID with PDF Studio the signature will not show as validated on other users computer as the trusted certificate will currently only be on your computer. You will need to send your newly created digital certificate to your recipients and they will need to install them before your signatures can be validated.*

How to Create Self-Signed Digital ID

1. Access the Add Digital ID dialog using one of the methods below
 - Go to **Edit -> Preferences** (Windows & Linux) or **PDF Studio 10 -> Preferences** (Mac). Select **Digital IDs** from the panel on the left of the preferences dialog and click on Add Digital ID.
 - When applying a digital signature, select **New Digital ID** from the drop down
 - Go to **Security -> Security Settings -> Digital IDs** and click on Add Digital ID.
2. Select Create New Digital ID Now
3. Fill out the information for digital ID. Name and Email Address are required
 - Valid Until: The expiration date of the digital ID
 - Name: Name of the signer
 - Organizational Unit: Name of the organizational unit
 - Organization Name: Name of the organization
 - Locality/City: city where the signer is located
 - State: state where the signer is located
 - Country: country where the signer is located
 - Email: Email address of the signer
4. Choose a location to save the digital ID and set a password
 - **Note:** *By default the location will be stored in the PDF Studio user settings folder*
5. Click Finish to create the digital ID
6. The newly created ID will be added to PDF Studio's list of IDs and can now be used when [Applying Digital Signatures](#)

Importing Digital IDs

In order to sign documents, you must first have a digital ID. If you have an existing digital ID either exported from another application or from a third-party Certificate Authority, it can be imported directly into PDF Studio to be used when signing documents. PDF Studio supports importing digital IDs in either .pfx or .p12 formats.

When using a digital ID from a third-party certificate authority there is no need to first send your digital certificate to your recipients because the OS will usually be able to validate the certificate from third-party vendors.

How to Import a Digital ID

1. Access the Add Digital ID dialog using one of the methods below
 - Go to **Edit -> Preferences** (Windows & Linux) or **PDF Studio 10 -> Preferences** (Mac). Select **Digital IDs** from the panel on the left of the preferences dialog and click on Add Digital ID.
 - When applying a digital signature, select **New Digital ID** from the drop down
 - Go to **Security -> Security Settings -> Digital IDs** and click on Add Digital ID.
2. Select Import my existing digital ID from a file and click Next
 - **Note:** *Only .pfx or .p12 formats can be imported*
3. Click on Browse to open the file dialog and locate the digital ID you wish to use
4. Enter the password for the selected digital ID file and click Next
 - **Note:** *If your digital ID has a complex password that is hard to remember you can select the "Use my password" option to save this password and protect it with your own password. When signing documents, PDF Studio will prompt you for your own password. This makes it easier to sign documents without having to remember the complex passwords.*
5. Some digital ID files may contain more than one digital ID and the following page will display a list of digital IDs that will be imported. Click on Finish to complete importing the digital ID.
6. The imported ID will be added to PDF Studio's list of IDs and can now be used when [Applying Digital Signatures](#)

Applying a Digital Signature

PDF Studio supports both digital signatures and certified digital signatures. It's important to understand the differences between each type of digital signature prior to applying one to a PDF. In order to sign documents, you must first have a digital ID. You can either [Create a New Digital ID](#) or [Import A Digital ID](#) to be used when digitally signing documents.

Note: *It's important to also understand that a digital signature is not the same as an electronic signature. An electronic signature is a graphical representation of a signature on pen and paper such as an image or drawing. A digital signature (which*

may also have a graphical representation) contains a unique encrypted ID to verify its authenticity.

Digital Signatures

A Digital Signature is similar to actually signing a physical document in that it identifies the person signing the document. The difference between a digital and hand written signature is that a digital signature contains encrypted information that is unique to the signer so it cannot be forged. The signer's certificate or issuing third-party Certificate Authority will need to be trusted by the user receiving the PDF in order for the signature to be considered valid. . Once signed, if the document is modified in any way the signature will no longer be considered valid.


Certified Digital Signatures

A certified digital signature is similar in that it contains an encrypted ID unique to the signer. However, a certified signature provides additional document security options to prevent the document from being modified. The signer has the option to prevent any further changes or allow some limited changes (i.e. filling forms, adding comments, or adding digital signatures) to the document once it has been signed .


How to Apply a Digital Signature

A digital signature can be applied to an existing signature field or a new signature field can be created to apply a signature to a document

Applying Signature to Existing Field

1. Click on the signature field, click on the Sign Document  button, or go to **Security -> Sign Document** on the menu bar
 - **Note:** *If there is more than one signature field in the document you will need to sign by clicking on the signature field*
2. This will display the Sign Document dialog. Select the Digital ID and enter the Password for the Digital ID
 - **Note:** *If this is your first signing a document you will be asked to either import an existing ID or create a new one.*
3. Select the [Digital Signature Options](#) and [Digital Signature Appearance](#) settings that you wish to use
4. Once complete click on Sign
5. This will then prompt you to select a location on your computer to save the signed document
6. Click Save to complete signing and save the document


Applying Signature When No Field Exists

1. Click on the Sign Document  button or go to **Security -> Sign Document** on the menu bar
2. When the tool is started, the cursor will become a crosshair to mark the location for the new field on the document. Drag a rectangle to create the desired signature field size
3. After the field is created, the Sign Document dialog will be displayed. Select the Digital ID and enter the Password for the Digital ID
 - **Note:** *If this is your first signing a document you will be asked to either import an existing ID or create a new one.*
4. Select the [Digital Signature Options](#) and [Digital Signature Appearance](#) settings that you wish to use
5. Once complete click on Sign
6. This will then prompt you to select a location on your computer to save the signed document
7. Click Save to complete signing and save the document


How to Apply a Certified Digital Signature

A Certified digital signature can be applied to a document using the instructions below. When applying a certified signature without a field the signature can be either visible or invisible. Invisible signatures are stored using the same encryption only there is no visual representation of the signature on any of the document's pages.

Applying a Certified Signature to Existing Field

1. Click on the signature field, click on the Sign Document  button, or go to **Security -> Certify Document -> Visible** on the menu bar
 - **Note:** *If there is more than one signature field in the document you will need to sign by clicking on the signature field*
2. This will display the Sign Document dialog. Select the Digital ID and enter the Password for the Digital ID
 - **Note:** *If this is your first signing a document you will be asked to either import an existing ID or create a new one.*
3. Choose the [Digital Signature Options](#) and [Digital Signature Appearance](#) settings that you wish to use
 - **Note:** *Make sure that "Certifying Signature" is selected for the signature Type*
4. Select the certifying signature permissions from the drop down
5. Once complete click on Sign
6. This will then prompt you to select a location on your computer to save the signed document
7. Click Save to complete signing and save the document

Applying a Certified Signature When No Field Exists

1. Click on the Sign Document  button or go to **Security -> Certify Document -> Visible** on the menu bar
2. When the tool is started, the cursor will become a crosshair to mark the location for the new field on the document. Drag a rectangle to create the desired signature field size
3. After the field is created, the Sign Document dialog will be displayed. Select the Digital ID and enter the Password for the Digital ID
 - **Note:** *If this is your first signing a document you will be asked to either import an existing ID or create a new one.*
4. Select the [Digital Signature Options](#) and [Digital Signature Appearance](#) settings that you wish to use
 - **Note:** *Make sure that "Certifying Signature" is selected for the signature Type*
5. Select the certifying signature permissions from the drop down
6. Once complete click on Sign
7. This will then prompt you to select a location on your computer to save the signed document
8. Click Save to complete signing and save the document

Applying an Invisible Certified Digital Signature

1. Go to **Security -> Certify Document -> Invisible** on the menu bar
2. The Sign Document dialog will be displayed. Select the Digital ID and enter the Password for the Digital ID
 - **Note:** *If this is your first signing a document you will be asked to either import an existing ID or create a new one.*
3. Select the [Digital Signature Options](#) and [Digital Signature Appearance](#) settings that you wish to use
 - **Note:** *Make sure that "Certifying Signature" is selected for the signature Type*
4. Select the certifying signature permissions from the drop down
5. Once complete click on Sign
6. This will then prompt you to select a location on your computer to save the signed document
7. Click Save to complete signing and save the document

Digital Signature Options

When [applying a digital signature](#) the following options are available to change either the appearance, signature type, or signature information. These settings are not saved and have to be set each time a signature is applied.

Digital ID

Digital ID - The digital ID combo will list all digital IDs saved in PDF Studio or available in your OS certificate store. A new digital ID can be added by selecting the New Digital ID... option in the list. See [Create a New Digital ID](#) or [Import A Digital ID](#) for more information.

Password - The password for the selected digital ID. You must enter the correct password in order to be able to digitally sign the document

Timestamp Server - Allows you to select a timestamp server to be used when signing. See [Managing Timestamp Servers](#) for more information

Details - Allows you to see the specific details for the selected digital ID

Appearance:

This section will display a preview of the digital signature as it will display on the document once applied. A different appearance can be selected from the drop down. Choose "Create New Appearance..." to create a new custom appearance. See [Digital Signature Appearance](#) for more information

Signature Type:

Select the type of signature to be applied to the when signing

Signature - A digital signature contains encrypted information that is unique to the signer so it cannot be forged. The signer's certificate or issuing third-party Certificate Authority will need to be trusted by the user receiving the PDF in order for the signature to be considered valid. Once signed, if the document is modified in any way the signature will no longer be considered valid.

Certifying Signature - A certified signature provides additional document security options to prevent the document from being modified. When choosing certifying signature, a combo box will show, allowing to specify which changes are permitted on the certified document.

- **Disallow Changes:** Does not allow any further changes to the document once signed

- Allow Form fill and Signatures: Allows users to fill forms and complete signatures once signed
- Allow Form fill, Signatures, and Comments: Allows users to fill forms, complete signatures, and add comments to the document once signed

Signature Information:

This section allows you to add additional details to the signature if needed. This information will not be displayed in the appearance but will be listed with the signature details

Reason - Select a reason the document was signed from the list from the below options

- I approve this document
- I am the author of this document
- I have reviewed this document
- I attest to the accuracy and integrity of this document
- I agree to the terms defined by this document

Location - Enter additional location details


Contact Info - Enter additional contact information for the signature

Digital Signature Appearance

PDF Studio allows you to customize the appearance of a digital signature to display only specific information that you choose. Multiple appearances can be created for different situations if needed. Created appearances can be used on any digital ID. Additionally, an image can be used for the signature appearance.

Note: *Altering a signature's appearance does not remove any of the details from the signature.*

How to Create a New Digital Signature Appearance

1. Begin signing a document to access the Sign Document dialog using one of the methods below
 - Click on the signature field
 - Click on the Sign Document  button

- Select go to **Security -> Sign Document** on the menu bar
2. Select "Create New Appearance..." in the Appearance drop down
 3. Enter a title and the signature appearance options you wish to use
 4. Once the options have been set click on OK to save the appearance

Signature Appearance Options

The following appearance options are available in PDF Studio.

Title

This will be the name of the created appearance that will display in the [Digital Signature Options](#) when applying a signature

Preview

Displays a preview of how the digital signature will look once applied to a document

Note: *The preview displays the signature in a standard dimension. If the field within the document is a different size the contents of the signature appearance will be resized to fit the field*

Image

Show Image - When checked an image can be added to the background of the digital stamp appearance

Transparency - Transparency setting for the image

File - The full path to the image file used in the signature. Click on the "..." button to open a file chooser and navigate to the image you wish to use .

Align - Allows you to align the image on the left, center, or right of the signature

Text

Show - The options below, when checked, set which digital signature properties will be displayed on the signature

- **Name:** The large text that will display the name
- **Digitally signed by:** Adds the text "Digitally signed by" before the Common Name
- **Date:** Date the signature was completed
- **Common Name:** The name associated with the digital ID
- **Organizational Unit:** The organizational unit associated with the digital ID

- **Organization Name:** The organization name associated with the digital ID
- **Locality/City:** the locality/city associated with the digital ID
- **State:** The state associated with the digital ID
- **Country:** The country associated with the digital ID
- **Email:** The email associated with the digital ID

Orientation - Sets the digital signature text to be displayed with one of two options

- **Left to Right:** Displays the Name on the left and all other properties in smaller text on the right
- **Right to Left:** Displays the Name on the right and all other properties in smaller text on the left

Validating Digital Signatures

PDF Studio validates any digital signatures upon opening a document. PDF Studio will first check that the digital signatures in the document use valid certificates and that the document has not been changed. It will then check that the certificate used to issue the digital ID in the signature was issued by a trusted certificate authority.

Validating Digital Signatures

Depending on the results of the validation, PDF Studio will display one of three icons on the signature:



The signature validated correctly, that there were no changes made to the document, and that the issuing certificate authority is trusted.




The signature validated correctly, but there might be some problems, such as the digital ID being issued by a certificate authority that is not trusted.



There were problems validating the signature. The problems can include any changes to the document after the signature was applied.

Checking Additional Validation Details

1. Using the Hand Tool  select the signature that you wish to validate.
2. This will display a dialog showing the Signature Validation Status
3. To view further information click on the Details button

Trusting Digital Signatures


Digital signatures can be added to your trusted certificates list from other users that you trust. Once added to your list, anytime a document is signed using the same digital ID it will be listed as trusted.

***Note:** It's important that you only trust certificates from someone you know and have already established a mutual trust.*


How to Trust a Digital ID

Trusted IDs can be added either from an existing signature field or by importing a trusted certificate

Using an Existing Signed Field

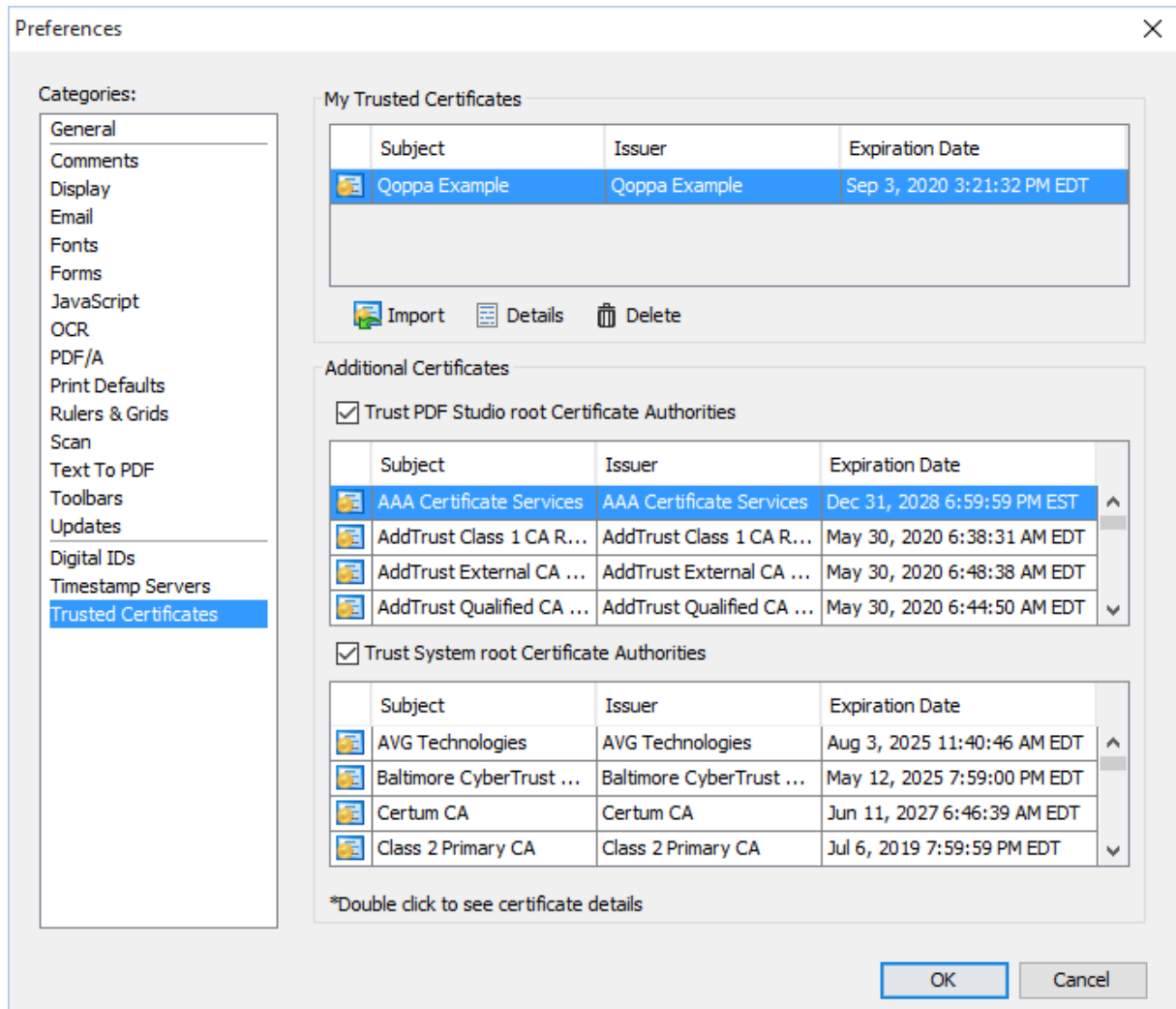
1. Using the Hand Tool  click on the signature that you wish to validate.
2. This will display a dialog showing the Signature Validation Status
3. Click on the Details button
4. Select a certificate on the left and click on the Trust Certificate button to add the digital ID as a trusted certificate

Importing Trusted Certificates

1. Go to **Edit > Preferences** (Windows & Linux) or **PDF Studio 10 > Preferences** (Mac)
2. Select **Trusted Certificates** from the panel on the left of the preferences dialog
3. Click on the Import  button. This will open a file chooser dialog
4. Navigate to the certificate you wish to import
 - **Note:** Only .cer or .crt formats can be imported
5. Click on Open to import the certificate and add the digital ID as a trusted certificate

Managing Trusted Certificates

When PDF Studio validates digital IDs, it checks that the digital ID was issued by a trusted certificate authority. The trusted certificate authorities can be managed using the preferences available in PDF Studio. By default, PDF Studio will also trust Oracle root certificate authorities, as well as those from your operating system.



Accessing the Trusted Certificate Settings

To access the trusted certificate preferences do one of the following

- Go to **Security -> Security Settings -> Trusted Certificates** from the menu.

- Go to **Edit -> Preferences** (Windows & Linux) or **PDF Studio 10 -> Preferences** (Mac) then select **Trusted Certificates** from the panel on the left


Trusted Certificate Options

My Trusted Certificates

My Trusted Certificates allows you to import, view, or delete any additional trusted certificates added to PDF Studio.


***Note:** When a digital ID is created or imported, its issuing authority is automatically added to the "My Trusted Certificates" list.*

Importing Trusted Certificates


Click on the Import  button. Then navigate to the certificate you wish to import and click on Open to import the certificate and add the digital ID as a trusted certificate

***Note:** Only .cer or .crt formats can be imported*

Viewing Trusted Certificate Details

Click on the Details  button to display the additional details of the selected certificate

Deleting Trusted Certificates

Click on the Delete  button to delete the selected certificate

***Note:** This cannot be undone. You will need to reimport the certificate if you wish to trust it again.*

Additional Certificates

The additional certificate settings allow you to enable or disable the PDF Studio or System root certificates. You can also double click on any of the certificates in the list to see their details.

Studio Root Certificate Authorities

By default, PDF Studio will trust Oracle root certificate authorities. Uncheck the box next to "Trust PDF Studio root Certificate Authorities" if you wish to not trust these authorities

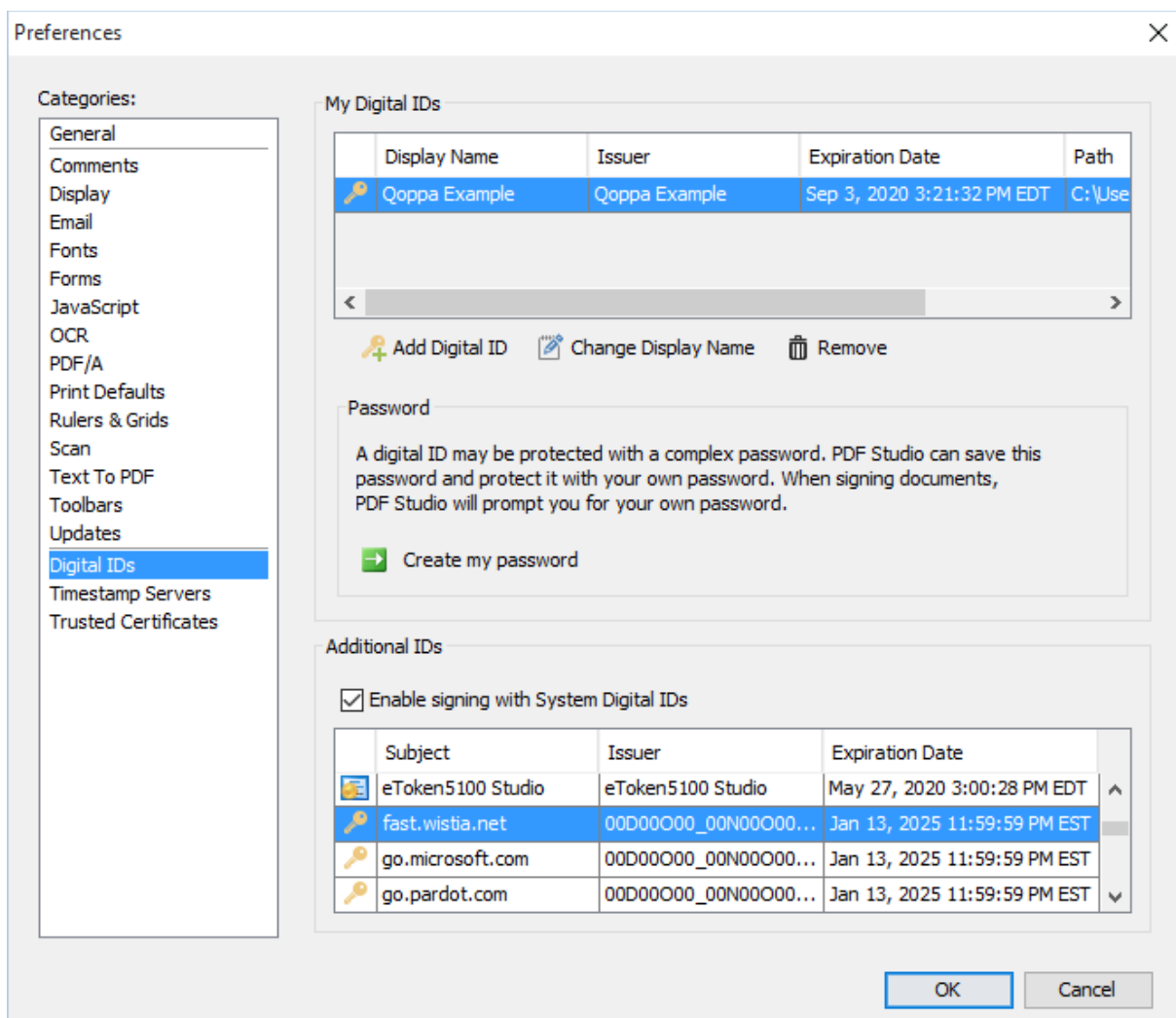
System Root Certificate Authorities

PDF Studio will also trust any system root certificate authorities by default. Uncheck the box next to "Trust System root Certificate Authorities" if you wish to not trust these authorities

Managing Digital IDs

PDF Studio allows you to manage digital IDs digital IDs that have been created with PDF Studio or Imported into PDF Studio. The My Password settings can also be managed from this screen as well.

Note: *Digital IDs found in the system will need to be managed by the system digital ID manager*



Accessing the Digital ID Settings


To access the digital ID preferences do one of the following

- Go to **Security -> Security Settings -> Digital IDs** from the menu.
- Go to **Edit -> Preferences** (Windows & Linux) or **PDF Studio 10 -> Preferences** (Mac) then select **Digital IDs** from the panel on the left


Digital ID Options

My Digital IDs


Add Digital ID

Click on the Add Digital ID  button to open a dialog and either [create](#) or [import](#) a digital ID

Change Display Name

Click on the Change Display Name  button to change the display name of the selected digital ID


Remove

Click on the Delete  button to delete the selected digital ID

Note: *This cannot be undone. You will need to create or reimport the digital ID if you wish to trust it again.*

My Password

If your digital ID has a complex password that is hard to remember you can select the "Use my password" option to save this password and protect it with your own password. When signing documents, PDF Studio will prompt you for your own password. This makes it easier to sign documents without having to remember the complex passwords.

Click on the Create My Password  button to setup a single password to be used when signing documents. This will open a dialog where you will enter the new password and create a password hint if needed.

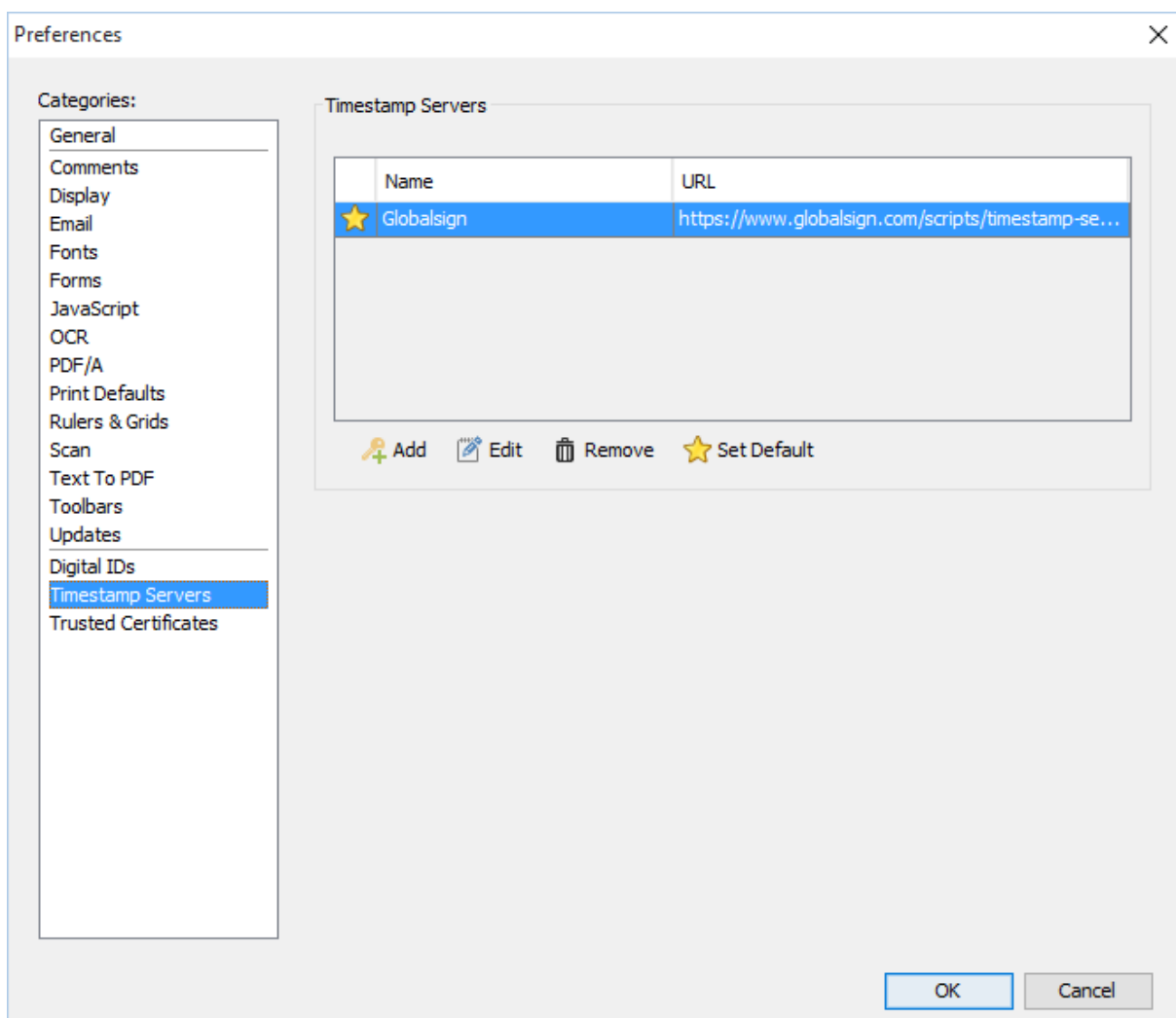
Note: *Make sure to use a password you can remember because you will need the password in order to apply any digital signature or to change and remove the My Password.*

Additional IDs

If you have IDs stored in your operating system, you can use those in PDF Studio as well. Uncheck the box next to "Enable Signing with System Digital IDs" if you wish to make these digital IDs available when signing

Managing Timestamp Servers

PDF Studio allows you to manage the timestamp servers that can be used when digitally signing PDFs.



Accessing the Timestamp Server Settings

To access the timestamp server preferences do one of the following


- Go to **Security -> Security Settings -> Timestamp Servers** from the menu.

- Go to **Edit -> Preferences** (Windows & Linux) or **PDF Studio 10 -> Preferences** (Mac) then select **Timestamp Servers** from the panel on the left

Timestamp Server Options


Timestamp Servers

Add

Click on the Add  button to add a new timestamp server. Use the dialog to set the settings for the server

- Server Information
 - Display Name: the name displayed in the [Digital Signature Options](#) when applying a stamp
 - URL: the URL of the timestamp server
 - Make this my default TSA: when checked, this timestamp server will be used as the default when signing
- User Information
 - TSA requires authentication: check this box if the server requires authentication
 - User name: the user name for authentication on the timestamp server
 - Password: the password for authentication on the timestamp server

Edit


Click on the Edit  button to change the details of the selected timestamp server

Remove

Click on the Delete  button to delete the selected timestamp server

Note: *This cannot be undone. You will need to re-add the timestamp server again if needed*

Set Default

Click on the Set Default  button to set the selected server as the default.

Note: *A default must be selected for a timestamp server to be used with signing or certifying.*

Document Properties

Additional document information such as the title, the fonts used, initial view, and security settings can be viewed using PDF Studio. Some settings can also be modified using this dialog.

These settings are separated into the following tabs

[General](#): View and edit the PDF's title, author, subject, and keywords

[Security](#): View and edit document security settings

[Initial View](#): Modify the properties that determine how the document will be initially displayed

[Fonts](#): Displays a list of fonts used in the document

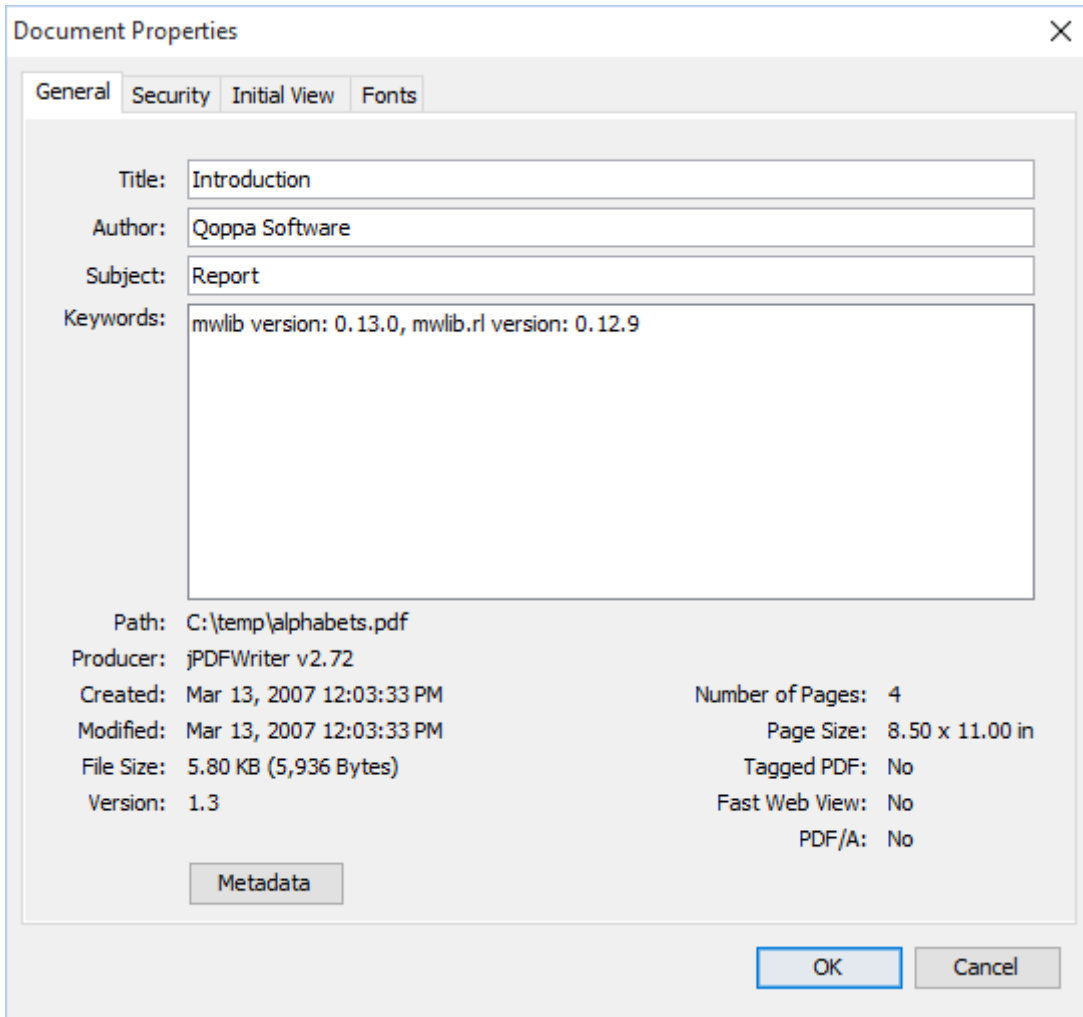
Accessing Document Properties

A document's properties can be accessed by going to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).

General Document Properties

The General document properties tab displays basic information about the document including Title, Author, Subject, and Keywords that were set by the document's creator. Additional file details such as the producer, created date, modified date, file size, page size, and file metadata are also displayed on this page. Only the Title, Author, Subject, and Keywords can be edited (unless the [Document Security](#) has been set)

Note: *The Title, Author, Subject, and Keywords are not required information in a PDF and so may be left blank.*



How to View the General Document Properties

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the General Tab

Document Properties

Title - Displays the current Title of the document. Can also be edited if desired

Author - Displays the current Author of the document. Can also be edited if desired

Subject - Displays the current Subject of the document. Can also be edited if desired

Keywords - Displays the current Keywords of the document. Can also be edited if desired

Path - The full address of where PDF file is stored on the computer

Note: *For new documents created in PDF Studio this will be blank until the file is saved*

Producer - Name of the application that generated the PDF file

Note: *This value may be empty if the application failed to include the name in the file properties*

Created - Date the document was created

Modified - Date the document was last modified

File Size - Amount of file space needed to store the PDF

Version - The PDF standards version of the PDF document

Number of pages - Number of pages in the document

Page Size - Displays the height and width of the document in either inches or millimeters depending on your local settings

Note: *For document's with multiple page sizes this value will show the size of the current page being displayed*

Tagged PDF - Whether or not the document has been tagged for accessibility

Fast Web View - Whether or not the document has been saved using the [Fast Web View](#) (linearized) format

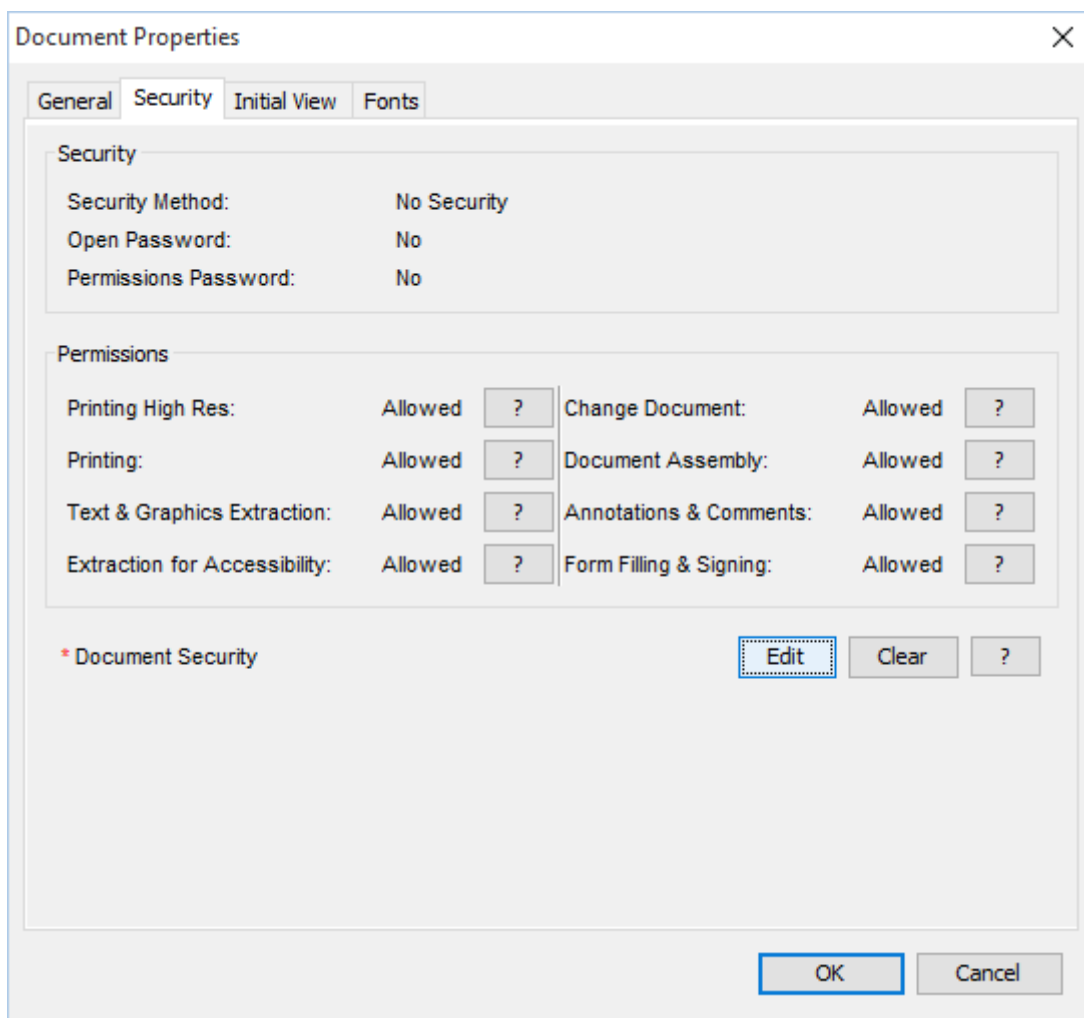
PDF/A - Whether or not the document meets the PDF/A standards

Metadata - When clicked, displays all of the document's properties in an XML format just as it is stored within the document

Document Security

PDF Studio can set or change passwords and permissions on PDF documents. The document's permissions can be configured to restrict the ways a document may be modified and accessed. A documents existing permissions can also be edited or removed.

Note: *Secured documents will have (SECURED) after the file name in the title bar.*



How to View the Document Security

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the Security Tab

Document Security Settings

Security

Security Method - The current encryption being used to secure the document

Open Password – Also known as the user password, it is the password that will be required when the documents are opened.

Permissions Password – Also known as the owner password, it is the password that will be required when trying to change permissions and passwords on the documents.

Permissions

Allow Printing High Res – Print the document at high resolution. When this permission is granted, the following permission 'Printing' is also automatically granted.

Allow Printing - Allow printing the document

Allow Text & Graphics Extraction – Copy or otherwise extract text and graphics from the document. When this permission is granted, the following permission 'Extraction for Accessibility' is also automatically granted.

Allow Extraction for Accessibility – Extract text and graphics in support of accessibility to disabled users or other purposes

Allow Document Changes – Modify the document. When this permission is granted, the following 3 permissions (Document Assembly, Comments and Form Filling) are also automatically granted. When this permission is not granted, the following 3 permissions (Document Assembly, Comments and Form Filling) can independently be granted.

Allow Document Assembly – Assemble the document: insert, rotate or delete pages and create bookmarks or thumbnail images

Allow Annotations & Comments – Add or modify text annotations. When this permission is granted, the following permission 'Filling Form Fields & Signing' is automatically granted. When this permission is not granted then the following permission 'Form Filling & Signing' can be granted independently. And when this permission is granted and the 'All Changes' permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.

Allow Filling Form Fields & Signing - Fill in existing interactive form fields including signature fields.

How to Edit/Create Document Security Settings

Two passwords may be set for a document: an open password and a permissions password. If set, the open password must be entered to open the document. The permissions password prevents anyone without the password from modifying the document's permissions.

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the Security Tab and then click on the Edit button

3. Choose the desired Document Security Settings
4. Click OK to set the settings
5. Save the document to save the new security settings

Note: *You must SAVE the document in order for the security settings to be set. Just setting them in the document properties does not apply them to the document*

How to Remove Document Security Settings

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the Security Tab
3. Click on the Edit button
4. Enter the Change Permissions password for the document and Click OK
5. Save the document to save the new security settings

Note: *You must SAVE the document in order for the security settings to be removed. Just clearing them in the document properties does not remove them to the document*

Document Initial View

The Initial View tab displays the initial view settings that determine how the document will be initially displayed when opened. These settings can be changed to control how the document appears the next time it is opened.

Note: *If "Ignore document setting" has been set on any of the options in the [Display Preferences](#), PDF Studio to ignore the document's settings and use the selected option instead of the options set in the initial view settings of the document*

How to View/Edit the Initial View Settings

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the Initial View Tab
3. Select the initial view settings you wish to use
4. Click OK to set the settings
5. Save the document to save the new initial view settings

Note: *You must SAVE the document in order for the initial view settings to be set. Just setting them in the document properties does not apply them to the document.*

Initial View Settings

Navigation tab - Sets the default behavior for the navigation tab when the document is opened

- Default: Uses the default settings for the application the document is opened in
- None (Document Only): No navigation tab will be displayed
- Bookmarks Panel: Displays the bookmarks panel when the document is opened
- Pages Panel: Displays the pages panel when the document is opened
- Attachments Panel: Displays the attachments panel when the document is opened
- Full Screen Mode: Displays the document in full screen mode when opened

Page Layout - Sets the default behavior for the page layout when the document is opened

- Default: Uses the default settings for the application the document is opened in
- Single: Displays only a single individual page at a time
- Single Continuous: Displays all of the document's pages in a single column that can be continuously scrolled
- Facing: Displays only two pages at a time side by side with odd pages on the left and even pages on the right
- Facing Continuous: Displays all of the documents pages in two columns with odd pages on the left and even pages on the right
- Cover: Displays the document just as when using Facing only the first page will be displayed alone
- Cover Continuous: Displays the document just as when using Facing Continuous only the first page will be displayed alone

Magnification - Sets the default magnification for the document when opened

- Default: Uses the default settings for the application the document is opened in
- Actual: Displays the document with a 1:1 ratio to match how the document would look if printed without any scaling
- Fit to Page: Scales the view to fit the width of the document in the PDF Studio frame
- Fit to Width: Scales the view to fit the entire document within the PDF Studio frame
- %: Sets the zoom to the specified number value

Open to Page - Sets the page number to be displayed when the document is opened

Document Fonts

The Fonts tab in document properties allows you to view the fonts that are used in the document. The dialog will provide information on both the font type and the font properties.

Font Types

Depending on the type of fonts within the documents, PDF Studio will display one of the follow

A- Signifies any font that is not either a Type 1 (CID), Type 3, or TrueType

F - Used when the font is either a Type 1 (CID) or Type 3

T- All TrueType fonts will display this symbol

Font Properties

Each font within the document can have its own properties. Below is a description of the properties that are associated with each font.

(Embedded) - An embedded font has the entire font stored within the PDF document. This means that if the font is not available on the system the text will still be displayed correctly.

(Embedded Subset) - An embedded subset font has portions of the font stored within the PDF. This means that not every character available in the font will be available. While the original document text will be displayed correctly, if any characters are added or modified that are not one of the embedded characters they may not show up correctly within the document

Type - The complete font type name

Encoding - The character encoding used in the font

Actual Font - If a substitute font is being used (when a font is not embedded) this will display the name of the font that replaced the Font listed

Actual Type - If a substitute font is being used (when a font is not embedded) this will display the type of the font that replaced the Font listed

Converting PDF Documents

PDF Studio is able to convert PDF documents to the following formats

[Fast Web View](#) (Linearized): Optimizes the document for faster web viewing

[HTML5/SVG](#): Converts the document to an SVG image wrapped in an HTML header to display PDFs in a web browser without needing a PDF viewer

[Images](#): Converts PDF documents into any of the following formats JPEG, TIFF, PNG, or GIF

[PDF/A-1B](#): Converts the document to meet the PDF/A-1B compliance standards

[Text](#): Extracts all text from a PDF document and creates a standard .txt file

Converting PDF to Fast Web View

PDF Studio allows you to convert PDF documents to fast web view (or linearized). Fast web view restructures the documents internal structure and content so that the pages load in order. When converting to Fast Web View the content is just reorganized internally. No content is altered or removed so the PDF will be displayed exactly the same as it was prior to conversion.

Converting to fast web view allows large documents to load faster when downloading from a web. Having the document structure and content in a linearized (from beginning to end) order allows a browser to immediately display the first page as the remainder of the document is still being loaded.

Note: *In order to see the complete speed benefits the server where the PDF is being hosted must also support page by page loading.*

How to Convert a PDF to Fast Web View

1. Open the PDF Document you wish to convert
2. Go to **File -> Convert To... -> Fast Web View** on the menu
3. Choose a file name and location to save the document
4. Click Save to create the document

Verify that Existing Document has Fast Web View Enabled

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the General Tab
3. In the lower right corner of the general document properties there will be a "Fast Web View" label that will show "Yes" if the document has Fast Web View Enabled.

Convert PDF to HTML5/SVG

PDF Studio allows you to convert PDF documents to an HTML5 web page. This makes it possible to easily publish the content of PDF document onto any website, as HTML5 is supported by all browsers, without the need of a viewer plugin. The PDF to HTML5 conversion engine in PDF Studio preserves fonts and uses the SVG format to preserve vector graphics. Sample PDF documents that have been converted to HTML5 can be found [HERE](#).

How to Convert a PDF to HTML 5

1. Open the PDF Document you wish to convert
2. Go to **File -> Convert To... -> HTML5/SVG**
3. Choose a file name and location to save the document
4. Click Save to create the document

Once the conversion is complete you can use the created HTML5 document in any application that supports HTML5 to view the document.

Converting PDF to Images

PDF Studio is able to convert the pages of a PDF document into the following image formats. When converting to an image all page content that is displayed is flattened and then exported using one of the below file types.

[Export pages as JPEG](#): Exports the pages of the current document as JPEG images

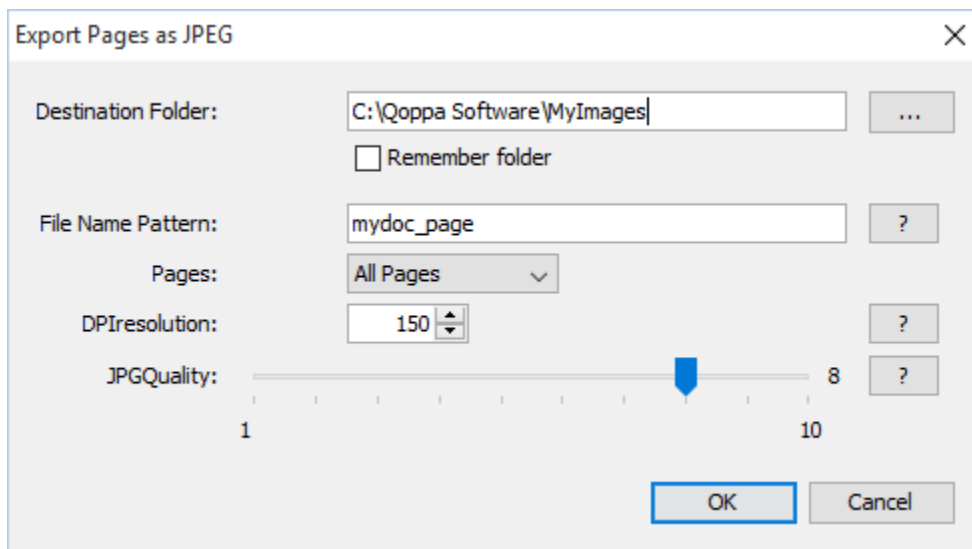
[Export pages as TIFF](#): Exports the pages of the current document as TIFF images

[Export pages as PNG](#): Exports the pages of the current document as PNG images

[Export pages as GIF](#): Exports the pages of the current document as GIF images

Export Pages as JPEG

PDF Studio is able export the pages of a PDF document as JPEG images. When exporting a PDF as an image all of the page content will be flattened and rasterized into a separate image for each page of the document.



How to Export PDF Pages as a JPEG Image

1. Go to **Images > Export Pages as JPEG** on the menu
2. Set the JPEG image export options you wish to use
3. Click OK to begin exporting the images

4. Once complete each page of the document will be exported as a separate file in the destination folder chosen

JPEG Image Export Options

The options in the Export Pages as JPEG dialog are as follows:

Destination Folder – You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

***Note:** If the document has many pages it is best to select specific or empty folder because a separate image file will be created for every single page. If you select a folder that already contains images or other files the folder may become overwhelming*

Remember Folder - When checked the selected folder will be remembered for the next time pages are exported as images

File Name Pattern – Enter the desired pattern for the output file names.

***Note:** Current page number and file extension ".jpg" will be appended to the pattern to create the final file name.*

Pages - The range of pages to be exported as images

- All Pages: all pages in the document
- Page Range: set the pages to be exported using the From and To options
- Even Pages Only: only export the even pages of the document
- Odd Pages Only: only export the odd pages of the document

DPI Resolution – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution. When selecting a DPI it's best to follow the below guidelines

Black-and-white documents

- Lowest acceptable resolution = 200 DPI (equal to “high” fax quality)
- Conventional resolution = 300 DPI
- Highest conventional resolution = 600 DPI

Color documents (and color compression)

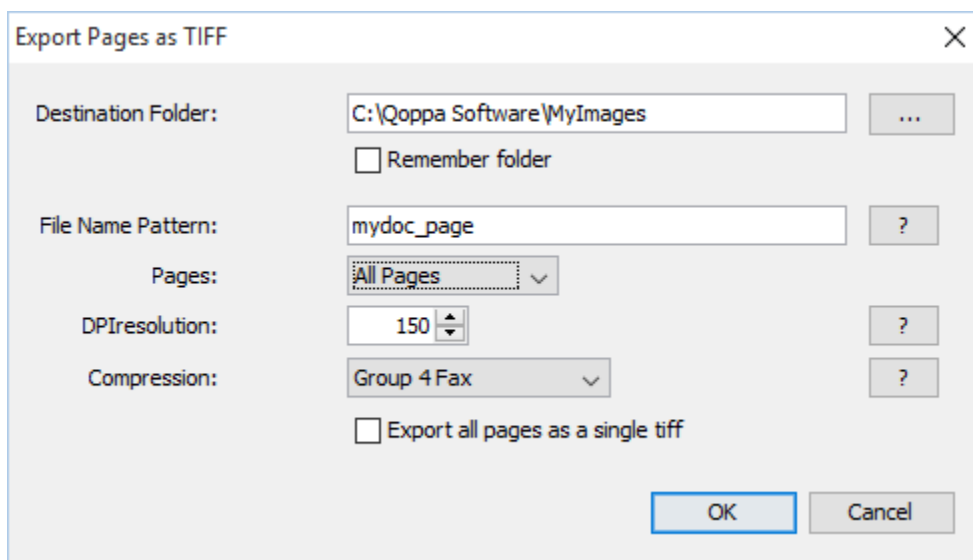
- Lowest acceptable resolution = 150 DPI
- Conventional resolution = 200 DPI
- Highest conventional resolution = 300 DPI
- Archive resolution = 600 DPI

JPG Quality – Select the desired quality of JPG compression. Based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.

- 0 – very high compression, very low quality
- 10 – low compression, very high quality

Export Pages as TIFF

PDF Studio is able export the pages of a PDF document as a TIFF image. When exporting a PDF as an image, by default all of the page content will be flattened and rasterized into a separate image for each page of the document. The TIFF image format does allow all pages to be exported into a single file which can be enabled in the export dialog in PDF Studio.



How to Export PDF Pages as a TIFF Image

1. Go to **Images > Export Pages as TIFF** on the menu
2. Set the TIFF image export options you wish to use
3. Click OK to begin exporting the images
4. Once complete each page of the document will be exported as a separate file in the destination folder chosen

TIFF Image Export Options

The options in the Export Pages as TIFF dialog are as follows:

Destination Folder – You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

***Note:** If the document has many pages it is best to select specific or empty folder because a separate image file will be created for every single page. If you select a folder that already contains images or other files the folder may become overwhelming*

Remember Folder - When checked the selected folder will be remembered for the next time pages are exported as images

File Name Pattern – Enter the desired pattern for the output file names.

***Note:** Current page number and file extension ".tiff" will be appended to the pattern to create the final file name.*

Pages - The range of pages to be exported as images

- All Pages: all pages in the document
- Page Range: set the pages to be exported using the From and To options
- Even Pages Only: only export the even pages of the document
- Odd Pages Only: only export the odd pages of the document

DPI Resolution – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution. When selecting a DPI it's best to follow the below guidelines

Black-and-white documents

- Lowest acceptable resolution = 200 DPI (equal to “high” fax quality)
- Conventional resolution = 300 DPI
- Highest conventional resolution = 600 DPI

Color documents (and color compression)

- Lowest acceptable resolution = 150 DPI
- Conventional resolution = 200 DPI
- Highest conventional resolution = 300 DPI
- Archive resolution = 600 DPI

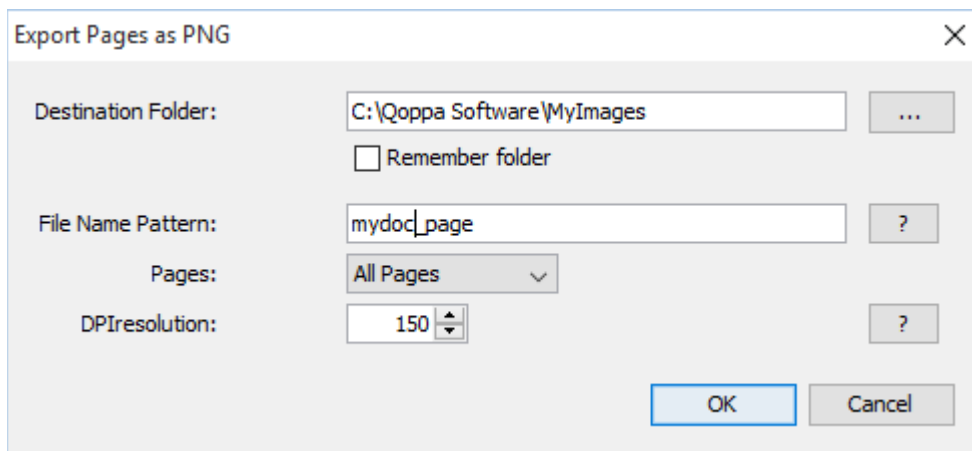
Compression – Choose the compression to use when exporting pages. The most standard one is Group 4 Fax, which is optimized for faxing.

- CCIT RLE
- Group 3 Fax
- Group 4 Fax
- Pack Bits
- LZW
- ZLib
- Deflate
- No Compression

Export all pages as a Single TIFF - The TIFF image format allows multiple images to be stored within a single document. When the image is opened in a supported viewer the image viewer will display page navigation tools just like in the document. This makes it easier to send a large number of pages as a single file instead of multiple files.

Export Pages as PNG

PDF Studio is able export the pages of a PDF document as PNG images. When exporting a PDF as an image all of the page content will be flattened and rasterized into a separate image for each page of the document.



How to Export PDF Pages as a PNG Image

1. Go to **Images > Export Pages as PNG** on the menu
2. Set the PNG image export options you wish to use
3. Click OK to begin exporting the images
4. Once complete each page of the document will be exported as a separate file in the destination folder chosen

PNG Image Export Options

The options in the Export Pages as PNG dialog are as follows:

Destination Folder – You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

***Note:** If the document has many pages it is best to select specific or empty folder because a separate image file will be created for every single page. If you select a folder that already contains images or other files the folder may become overwhelming*

Remember Folder - When checked the selected folder will be remembered for the next time pages are exported as images

File Name Pattern – Enter the desired pattern for the output file names.

***Note:** Current page number and file extension ".png" will be appended to the pattern to create the final file name.*

Pages - The range of pages to be exported as images

- All Pages: all pages in the document
- Page Range: set the pages to be exported using the From and To options
- Even Pages Only: only export the even pages of the document
- Odd Pages Only: only export the odd pages of the document

DPI Resolution – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution. When selecting a DPI it's best to follow the below guidelines

Black-and-white documents

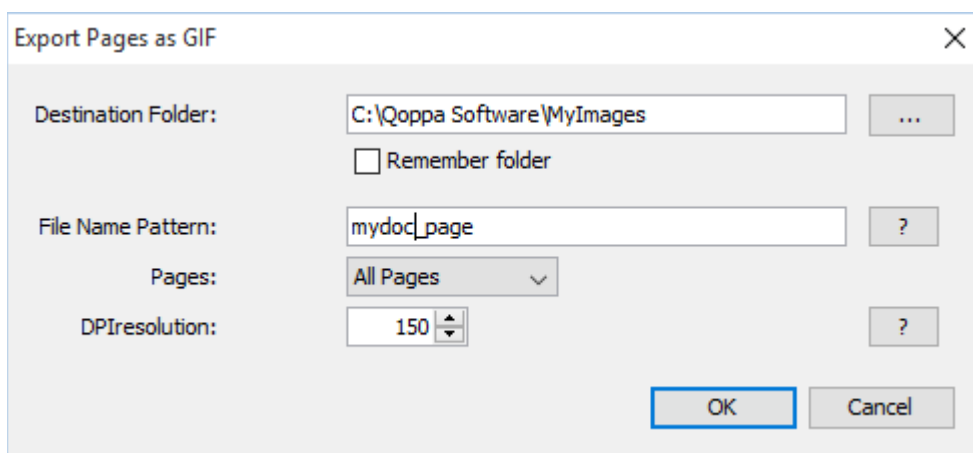
- Lowest acceptable resolution = 200 DPI (equal to “high” fax quality)
- Conventional resolution = 300 DPI
- Highest conventional resolution = 600 DPI

Color documents (and color compression)

- Lowest acceptable resolution = 150 DPI
- Conventional resolution = 200 DPI
- Highest conventional resolution = 300 DPI
- Archive resolution = 600 DPI

Export Pages as GIF

PDF Studio is able export the pages of a PDF document as GIF images. When exporting a PDF as an image all of the page content will be flattened and rasterized into a separate image for each page of the document.



How to Export PDF Pages as a GIF Image

1. Go to **Images > Export Pages as GIF** on the menu
2. Set the GIF image export options you wish to use
3. Click OK to begin exporting the images
4. Once complete each page of the document will be exported as a separate file in the destination folder chosen

GIF Image Export Options

The options in the Export Pages as GIF dialog are as follows:

Destination Folder – You can type the destination manually or click on the "..." button to open a directory chooser to set the destination folder

***Note:** If the document has many pages it is best to select specific or empty folder because a separate image file will be created for every single page. If you select a folder that already contains images or other files the folder may become overwhelming*

Remember Folder - When checked the selected folder will be remembered for the next time pages are exported as images

File Name Pattern – Enter the desired pattern for the output file names.

Note: *Current page number and file extension ".gif" will be appended to the pattern to create the final file name.*

Pages - The range of pages to be exported as images

- All Pages: all pages in the document
- Page Range: set the pages to be exported using the From and To options
- Even Pages Only: only export the even pages of the document
- Odd Pages Only: only export the odd pages of the document

DPI Resolution – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution. When selecting a DPI it's best to follow the below guidelines

Black-and-white documents

- Lowest acceptable resolution = 200 DPI (equal to “high” fax quality)
- Conventional resolution = 300 DPI
- Highest conventional resolution = 600 DPI

Color documents (and color compression)

- Lowest acceptable resolution = 150 DPI
- Conventional resolution = 200 DPI
- Highest conventional resolution = 300 DPI
- Archive resolution = 600 DPI

Converting PDF to PDF/A-1B

PDF Studio provides the ability to save files in the PDF/A-1B format. PDF/A-1B is a strict subset of the ISO PDF specification used to create archival versions of documents with the intent that they will always render exactly the same as when they were saved. PDF/A is growing in popularity as international governments, libraries, newspapers, and legal systems recognize the need for digital documents to be preserved in a consistent format for a long period of time.


When converting to PDF Studio will attempt to convert the PDF to the PDF/A-1B format by making the following changes to the document

- Graphics will be converted to a device-independent format. If any device dependent color spaces are used, they will be defined by embedding a color profile for these color spaces.
- [Standard PDF fonts](#) will be embedded.
- Transparency will be removed.
- Unsupported annotations (e.g., video, audio, 3D) will be removed.
- JavaScript (mostly used in Forms) will be removed.
- Embedded files and external hyperlinks will be removed.

How to Convert a PDF to PDF/A-1B

1. Open the PDF Document you wish to convert
2. Go to **File -> Convert To... -> PDF/A-1B** on the menu
3. A dialog will be displayed showing the changes that will be made to the document
4. Choose a file name and location to save the document
5. Click Save to convert the document to PDF/A-1B

PDF/A Conversion Results

PDF Studio will attempt to convert every file but due to the PDF/A-1B requirements some files may not be able to be converted. If the conversion fails a dialog will be displayed showing the reasons that the conversion failed. A red  symbol will be displayed next to the items that are not PDF/A compliant and can not be fixed by PDF Studio PDF/A conversion.

Note: *When the conversion is successful no dialog will be displayed as the conversion process completed and saved the new document correctly*

Unsupported Features in PDF/A-1B Conversion:

Below is a list of features that may cause errors during the PDF/A-1B conversion.

- The PDF document contains non-embedded, non standard system fonts. Only the [standard 14 PDF fonts](#) can be embedded. Non standard system fonts will not be embedded.
 - **Workaround:** There is no workaround for fixing this other then recreating the PDF document using different fonts.
- The PDF document is secured / encrypted with passwords and permissions.
 - **Workaround:** Users should clear any security on a document before running PDF/A conversion.
- The PDF documents has user rights enabled.
 - **Workaround:** Users should clear user rights before running PDF/A conversion.
- The PDF document contains a digital signature. Converting to PDF/A would invalidate any digital signature.
 - **Workaround:** Users should clear or remove digital signature fields before running PDF/A conversion.

- The PDF document contains unsupported PDF commands or operators. Often these documents can not render in PDF Studio or will have pages that do not render properly.
 - **Workaround:** Users may be able delete the invalid pages.

Verify that Existing Document is PDF/A-1B Compliant

Viewing the Document or Document Properties

When opening a document that is PDF/A-1B compliant a blue notification "This document is tagged as PDF/A-1B compliant" will be displayed at the bottom of the PDF Studio window. You can also confirm the PDF/A-1B compliance in the document properties dialog.

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the General Tab
3. In the lower right corner of the general document properties there will be a "PDF/A" label that will show "Yes" if the document meets the PDF/A-1B compliance standards

Using Preflight Verification

You can also use the [PDF/A-1B Preflight Verification](#) to verify that the document complies with the PDF/A-1B standards

Extracting Text from PDF

PDF Studio is able to extract all text contained within a PDF document. During this process PDF Studio will extract all text in the document and export the raw text data to the .txt file. The text can then be copied into a text editor to be formatted if needed.

Note: *The text will be exported with no formatting except for return characters (designates move to the next line). PDF Studio does not currently support exporting PDFs into the Microsoft Word format.*

How to Extract Text from a PDF

1. Open the PDF Document you wish to convert
2. Go to **Document -> Extract Text** on the menu

3. Choose a file name and location to save the .txt document that will contain the extracted text
4. Click Save to extract the text and to the file selected

Note: *Only documents that contain text using font characters can be extracted. If the PDF contains scanned images of documents you will first need to [OCR the PDF](#) in order to be able to extract text.*

PDF Preflight

PDF Studio can both verify document compliance and convert PDFs to meet various ISO PDF archival compliance standards.

[Preflight Verification](#) - The following formats can be verified in PDF Studio

- [PDF/X-1a:2001 – ISO 15930-1](#)
- [PDF/X-1a:2003 – ISO 15930-4](#)
- [PDF/X-3:2002 – ISO 15930-3](#)
- [PDF/X-3:2003 – ISO 15930-6](#)
- [PDF/A-1B](#)

[Preflight Conversion](#) - PDF Studio can convert to the following formats

- [PDF/A-1B](#)

Verification

PDF Studio provides preflight and compliance verification to verify the document meets various archival compliances defined by ISO PDF standards. When verifying documents PDF Studio will generate a report listing the errors. Errors can then be exported or appended to the current PDF if needed.

Below are the available PDF archival standards that PDF Studio is able to verify.

- [PDF/X-1a:2001 – ISO 15930-1](#)
- [PDF/X-1a:2003 – ISO 15930-4](#)
- [PDF/X-3:2002 – ISO 15930-3](#)
- [PDF/X-3:2003 – ISO 15930-6](#)
- [PDF/A-1B](#)


How to Run Preflight Verification on a PDF

1. Open the document you wish to verify
2. Select **Document -> Preflight -> Preflight...** or use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) to show the Preflight dialog.


- **Note:** *Alternatively, you can also choose the standard directly from the **Document** -> **Preflight** menu that you would like to use to check the document.*
- 3. This will display the preflight profile selection menu. Select the standard that you wish to verify and click Execute.
- 4. The resulting Dialog will display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.

 - Items that are not compliant and that can NOT be fixed by PDF Studio [Preflight Conversion](#).

 - Items that are not compliant and that COULD be fixed by PDF Studio [Preflight Conversion](#).

 - Items that are not compliant and that WILL be fixed by PDF Studio [Preflight Conversion](#).

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

PDF/X-1a:2001 – ISO 15930-1 Verification

PDF Studio provides PDF/X-1a:2001 – ISO 15930-1 preflight and compliance verification. Once verification is complete the results can be reviewed, appended to the document or exported if needed.

How to Verify PDF/X-1a:2001 – ISO 15930-1 Compliance

1. Open the document you wish to verify
2. Select **Document -> Preflight -> PDF/X-1a:2001 – ISO 15930-1 Compliance** to show the Preflight dialog.
 - **Note:** *Alternatively, you can also use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) choose the standard directly from the preflight profile selection menu.*
3. PDF Studio will then test the document and display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.



- Items that are not PDF/X-1a:2001 – ISO 15930-1 compliant

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

PDF/X-1a:2003 – ISO 15930-4 Verification

PDF Studio provides PDF/X-1a:2003 – ISO 15930-4 preflight and compliance verification. Once verification is complete the results can be reviewed, appended to the document or exported if needed.

How to Verify PDF/X-1a:2003 – ISO 15930-4 Compliance

1. Open the document you wish to verify
2. Select **Document -> Preflight -> PDF/X-1a:2003 – ISO 15930-4 Compliance** or u to show the Preflight dialog.
 - **Note:** *Alternatively, you can also use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) choose the standard directly from the preflight profile selection menu.*
3. PDF Studio will then test the document and display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.



- Items that are not PDF/X-1a:2003 – ISO 15930-4 compliant

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

PDF/X-3:2002 – ISO 15930-3 Verification


PDF Studio provides PDF/X-3:2002 – ISO 15930-3 preflight and compliance verification. Once verification is complete the results can be reviewed, appended to the document or exported if needed.

How to Verify PDF/X-3:2002 – ISO 15930-3 Compliance

1. Open the document you wish to verify
2. Select **Document -> Preflight -> PDF/X-3:2002 – ISO 15930-3 Compliance** or u to show the Preflight dialog.
 - **Note:** *Alternatively, you can also use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) choose the standard directly from the preflight profile selection menu.*
3. PDF Studio will then test the document and display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.

 - Items that are not PDF/X-3:2002 – ISO 15930-3 compliant

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

PDF/X-3:2003 – ISO 15930-6 Verification


PDF Studio provides PDF/X-3:2003 – ISO 15930-6 preflight and compliance verification. Once verification is complete the results can be reviewed, appended to the document or exported if needed.

How to Verify PDF/X-3:2003 – ISO 15930-6 Compliance

1. Open the document you wish to verify
2. Select **Document -> Preflight -> PDF/X-3:2003 – ISO 15930-6 Compliance** or u to show the Preflight dialog.
 - **Note:** *Alternatively, you can also use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) choose the standard directly from the preflight profile selection menu.*
3. PDF Studio will then test the document and display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.

 - Items that are not PDF/X-3:2003 – ISO 15930-6 compliant

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

PDF/A-1B Verification


PDF Studio provides PDF/A-1B preflight and compliance verification. Once verification is complete the results can be reviewed, appended to the document or exported if needed.


How to Verify PDF/A-1B Compliance


1. Open the document you wish to verify
2. Select **Document -> Preflight -> PDF/A-1B Verification** or u to show the Preflight dialog.
 - **Note:** *Alternatively, you can also use the shortcut key Ctrl + Shift + X (Mac: Command + Shift + X) choose the standard directly from the preflight profile selection menu.*
3. PDF Studio will then test the document and display the results of the verification.

Preflight Verification Results

Results List - Lists any content in the document that is not compliant with the given specification.

 - Items that are not PDF/A compliant and that can NOT be fixed by PDF Studio [PDF/A Conversion](#).

 - Items that are not PDF/A compliant and that COULD be fixed by PDF Studio [PDF/A Conversion](#).

 - Items that are not PDF/A compliant and that WILL be fixed by PDF Studio [PDF/A Conversion](#).

Expand - Expands the results tree to show all preflight error results

Collapse - Collapses the results tree to only show the preflight error categories

Print - Prints the entire tree exactly as it is displayed in the preflight results list

Preflight Result Options

Select the result options you wish to use and then click Close to apply the selected option

Add annotations for preflight errors - When checked, will add an annotation for each preflight error with the details of the error in the annotation comment

Create preflight report - When checked, allows you to select one of the following options:

Append report to document - Appends a Preflight Results report to the end of the currently opened document.

Create new document - Creates a new document with the only the error results that will be saved at the location specified. Click on Browse... to select a destination for the exported report

Conversion

PDF Studio allows you to convert PDF documents to ISO PDF archival formats. These document formats were designed so that they will always render exactly the same as when they were saved.

Below are the available PDF archival standards that PDF Studio is able to convert.

- [PDF/A-1B](#)

Converting PDF to PDF/A-1B

PDF Studio has the ability to convert files in the PDF/A-1B format. PDF/A-1B is a strict subset of the ISO PDF specification used to create archival versions of documents with the intent that they will always render exactly the same as when they were saved.


When converting to PDF Studio will attempt to convert the PDF to the PDF/A-1B format by making the following changes to the document

- Graphics will be converted to a device-independent format. If any device dependent color spaces are used, they will be defined by embedding a color profile for these color spaces.
- [Standard PDF fonts](#) will be embedded.
- Transparency will be removed.
- Unsupported annotations (e.g., video, audio, 3D) will be removed.
- JavaScript (mostly used in Forms) will be removed.
- Embedded files and external hyperlinks will be removed.

How to Convert a PDF to PDF/A-1B

1. Open the PDF Document you wish to convert
2. Go to **File -> Convert To... -> PDF/A-1B** on the menu
3. A dialog will be displayed showing the changes that will be made to the document
4. Choose a file name and location to save the document
5. Click Save to convert the document to PDF/A-1B

PDF/A Conversion Results

PDF Studio will attempt to convert every file but due to the PDF/A-1B requirements some files may not be able to be converted. If the conversion fails a dialog will be displayed showing the reasons that the conversion failed. A red  symbol will be displayed next to the items that are not PDF/A compliant and can not be fixed by PDF Studio PDF/A conversion.

Note: *When the conversion is successful no dialog will be displayed as the conversion process completed and saved the new document correctly*

Unsupported Features in PDF/A-1B Conversion:

Below is a list of features that may cause errors during the PDF/A-1B conversion.

- The PDF document contains non-embedded, non standard system fonts. Only the [standard 14 PDF fonts](#) can be embedded. Non standard system fonts will not be embedded.
 - **Workaround:** There is no workaround for fixing this other than recreating the PDF document using different fonts.
- The PDF document is secured / encrypted with passwords and permissions.
 - **Workaround:** Users should clear any security on a document before running PDF/A conversion.
- The PDF documents has user rights enabled.
 - **Workaround:** Users should clear user rights before running PDF/A conversion.
- The PDF document contains a digital signature. Converting to PDF/A would invalidate any digital signature.
 - **Workaround:** Users should clear or remove digital signature fields before running PDF/A conversion.
- The PDF document contains unsupported PDF commands or operators. Often these documents can not render in PDF Studio or will have pages that do not render properly.
 - **Workaround:** Users may be able delete the invalid pages.

Verify that Existing Document is PDF/A-1B Compliant

Viewing the Document or Document Properties

When opening a document that is PDF/A-1B compliant a blue notification "This document is tagged as PDF/A-1B compliant" will be displayed at the bottom of the PDF Studio window. You can also confirm the PDF/A-1B compliance in the document properties dialog.

1. Go to **Document -> Document Properties** from the menu or using the shortcut keys Ctrl + D (Cmd + D on Mac).
2. Click on the General Tab
3. In the lower right corner of the general document properties there will be a "PDF/A" label that will show "Yes" if the document meets the PDF/A-1B compliance standards

Using Preflight Verification

You can also use the [PDF/A-1B Preflight Verification](#) to verify that the document complies with the PDF/A-1B standards

Glossary

A

Annotation: a note of explanation or comment added to a text or diagram.

Area: the amount of space inside the boundary of a flat (2-dimensional) object such as a square, triangle, or circle.

B

B&W: stands for black and white

Bookmark: a type of link with representative text in the navigation panel. Each bookmark in the navigation panel goes to a different view or page in the document.

C

Comments: notes associated with Annotations and Markups that communicate ideas or provide feedback.

D

Digital ID: an electronic form of identification used when signing documents that proves your identity. A digital ID usually contains your name and email address, the name of the organization that issued it, a serial number, and an expiration date. Digital IDs are used for certificate security and digital signatures.

E

Embedded Font: contains the entire font stored within the PDF document.

Embedded Subset Font: contains portions of the font stored within the PDF. This means that not every character available in the font will be available.

F

FDF: a text file format used by Adobe Acrobat. FDF files are used for text files exported from .PDF files. FDF files are smaller than .PDF files because they only contain the form field data, and not the entire form.

G

GIF: a lossless format for image files that supports both animated and static images.

H

HTML5: a W3C specification that defines the fifth major revision of the Hypertext Markup Language (HTML). One of the major changes in HTML5 is in respect to how HTML addresses Web applications. Other new features in HTML5 include specific functions for embedding graphics, audio, video, and interactive documents.

Hyperlink: a link from a hypertext file or document to another location or file, typically activated by clicking on a highlighted word or image on the screen.

J

JavaScript: an object-oriented computer programming language commonly used to create interactive effects within web browsers.

JPEG: JPEG (usually pronounced JAY-pehg) is any graphic image file produced by using a JPEG standard.

L

Lossless Compression: a class of data compression algorithms that allows the original data to be perfectly reconstructed from the compressed data.

Lossy Compression: a class of data encoding methods that uses inexact approximations (or partial data discarding) to represent the content. These techniques are used to reduce data size for storage, handling, and transmitting content.

M

Metadata: a set of data that describes and gives information about other data within the PDF.

O

OCR: Optical Character Recognition (OCR) is the mechanical or electronic conversion of images of typed or printed text into machine-encoded searchable text data.

P

PDF: Portable Document Format (PDF) is a file format that provides an electronic image of text and/or graphics that looks like a printed document and can be viewed, printed, and electronically transmitted.

Perimeter: the distance around the boundary of a flat (2-dimensional) object such as a square, triangle, or circle.

PNG: a raster graphics file format that supports lossless data compression.

R

Redaction: a form of editing in which confidential information such as texts or images are removed (redacted) to prepare a document for final publication.

S

Sane: Scanner Access Now Easy (SANE) is an application programming interface (API) that provides standardized access to any raster image scanner hardware (flatbed scanner, handheld scanner, video- and still-cameras, frame grabbers, etc.). The SANE API is public domain and its discussion and development is open to everybody.

T

TIFF: a common format for exchanging raster graphics (bitmap) images between application programs, including those used for scanner images. A TIFF file can be identified as a file with a ".tiff" or ".tif" file name suffix.

TWAIN: TWAIN is an applications programming interface (API) and communications protocol that regulates communication between software and digital imaging devices, such as image scanners and digital cameras. TWAIN is not a hardware-level protocol; it requires a driver called Data Source for each device.

W

WIA: Windows Image Acquisition (WIA; sometimes also called Windows Imaging Architecture) is a proprietary Microsoft driver model and application programming interface (API) for Microsoft Windows Me and later Windows operating systems that enables graphics software to communicate with imaging hardware such as scanners, digital cameras and Digital Video-equipment.

X

XFDF: an XML-based file format for representing form data and annotations that are contained in a PDF form. XFDF helps keep your data secure. Therefore when opening an XFDF file in Adobe Reader, you may need to trust the site transferring the data.

XML: Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding documents in a format which is both human-readable and machine-readable.