PDF Studio 8 User Guide

Table of Contents

PDF Studio - Version 8

PDF Studio is a powerful, yet easy to use PDF creator, converter, and editor. You can start by creating your own PDF documents using the scan-to-PDF feature, converting supported file types to PDF using the Create PDF option under File, or work with existing PDF documents created by other sources. PDF Studio then allows you to add annotations, headers and footers, bookmarks, stamps with text and images, fill forms, edit document content, and perform other functions such as splitting and merging, setting passwords, and more...

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.

Download PDF Studio 8 User Guide (.PDF)

Download PDF Studio 7 User Guide (.PDF)

Go to PDF Studio Home

Go to PDF Studio Knowledge Base

Getting Started with PDF Studio

To start using PDF studio, simply launch the program 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 document toolbar.
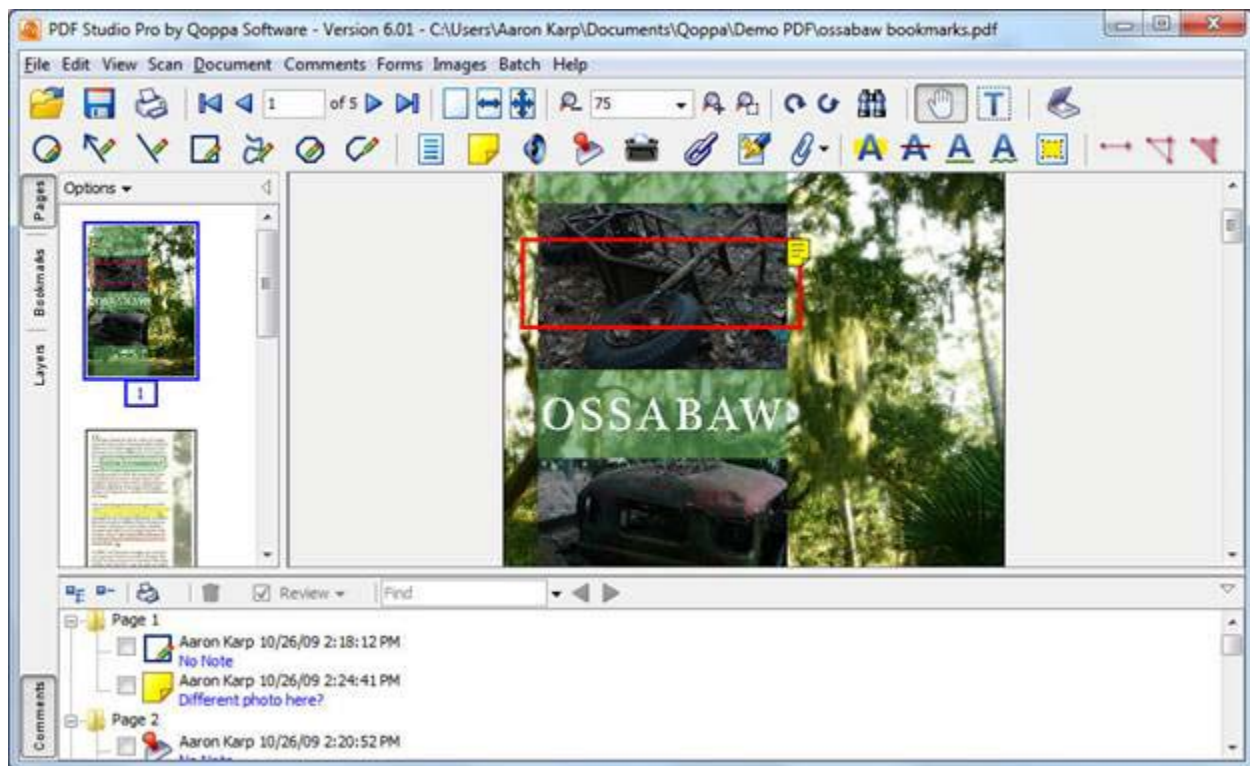
Screenshot of PDF Studio Application
with Thumbnails View on the left pane
and Comments View on the bottom pane

- **The main menu** contains the following entries:
    - File – functions to work with PDF files, including opening, creating, saving, reverting, etc.
    - Edit – Undo, 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 – Export and import form data, reset and flatten fields.

- o Images – Export pages as images and import images.
- o Batch ![Pro] – Print a batch, apply actions to a batch, set security to a batch, etc…
- o Security – View and set document security, digitally sign a PDF
- o Window – Cascade, tile, or minimize windows.
- o Help – Access to documentation, send an email to support, information about PDF Studio.
- **The annotations toolbar** is used to add new annotations.
- **The left pane** of the application can switch back and forth between four different views . It can be opened or closed by clicking the arrow icons on the separator between the document view and the pane. The separator can also be moved to the left or to the right to decrease or increase the width of the pane. The following views are available:
  1. **Thumbnails Pane** – view miniature versions of all the pages in the documents. By clicking on a thumbnail, the application will go to the corresponding page. This allows you to have easy access to any page in the document. 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. To see the thumbnail view, click on the Pages tab.
  2. **Bookmarks Pane** – view bookmarks or the document's table of contents, if present. Bookmarks allow navigation through bookmarked regions. To see the bookmarks view, click on the Bookmarks tab.
  3. **Signatures Pane** – view digital signatures that have been applied to the document.
  4. **Layers Pane** – view layers contained in the document, if any. You can turn layers on and off by checking them on or off.
- On the right pane of the application, the [Tool Chest Pane] allows you to view and apply frequently used comments.
- On the bottom pane of the application, the Comments view allows you to view any comments / annotations in the document. This view allows navigation through the document by jumping from one annotation to another. To see the comments view, click on the Comments button at the bottom of the left pane. The comments pane can be open or closed by

clicking the "X" icon on the separator between the document view and the pane. The separator can also be moved up or down to decrease or increase the height of the pane.
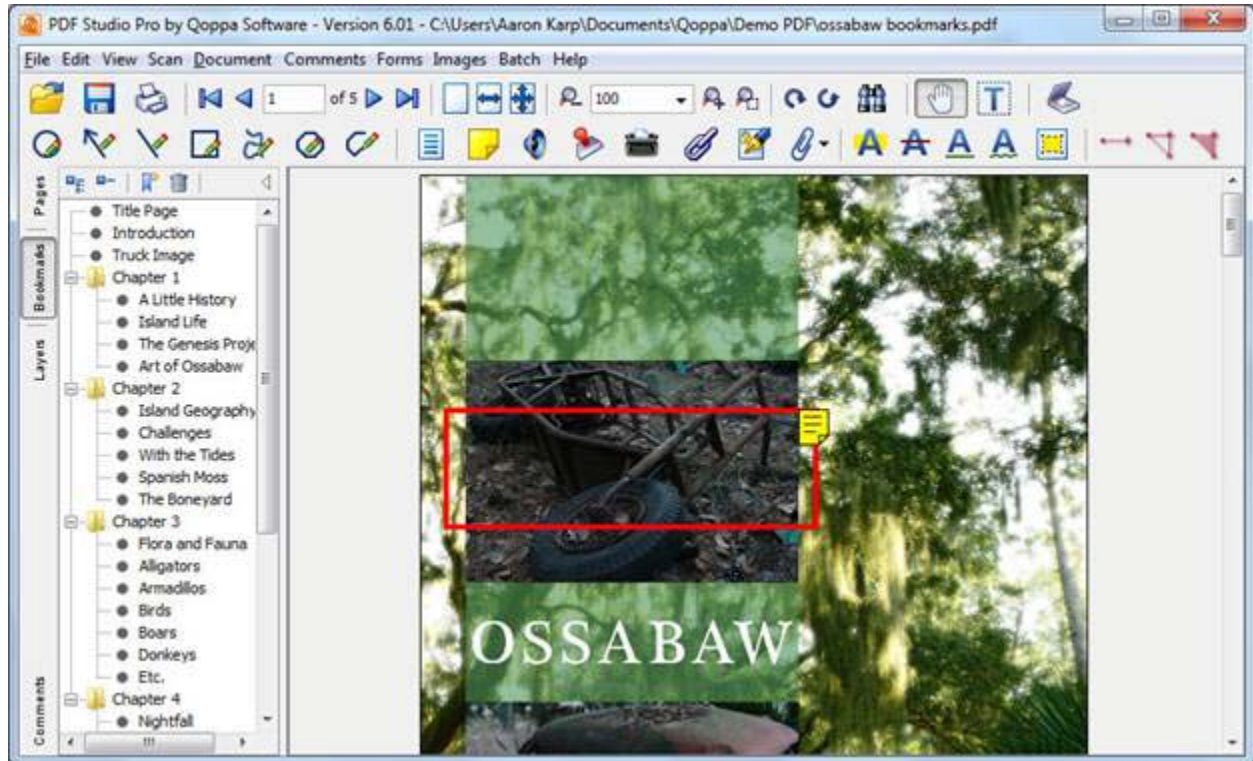
Screenshot of PDF Studio Frame
with Bookmarks View

To unregister your copy of PDF Studio to move the license to another computer, go to Help > License Information and click the Unregister button.

User Preferences

Open the Preferences dialog

To open the preferences dialog, choose Edit > Preferences (PDF Studio 8 > Preferences on Mac) from the top toolbar. The application will display the Preferences Dialog:
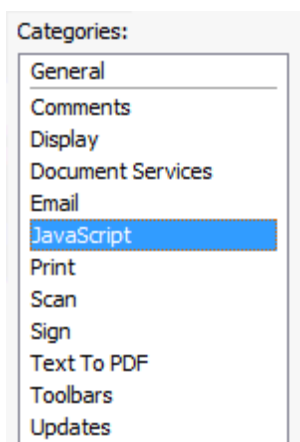
General

Language
Language: English ▼
Setting will be applied next session

Author
Author: Qoppa

Default Page
Size: Letter ▼   Orientation: Portrait ▼

Units
Units: Inches ▼

Paste Images
☐ Adjust To Zoom

Snapshot
☑ Save As PNG ▼
Folder: C:\temp

Other
☑ Use system file dialog   ?
☑ Use temporary file on save   ?

- **Language** – Sets the preferred language. Languages available are English, French, German, and Spanish. The default language will be determined from the language setting for the computer/operating system. After changing the language preference, the application will have to be restarted for the change to take effect.
- **Author** – This is the author name to be associated with the annotations added to the document.
- **Default Page** – Sets the default page size and orientation
- **Units** – Define preferred measurement units (inches, centimeters, points, ..). 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** – When Save As is 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.
- **Other**

- Switch between the Java file dialog and System file dialog. This selection is available to Windows and Linux/Unix users.
- Create a temporary file when saving documents.

Comments
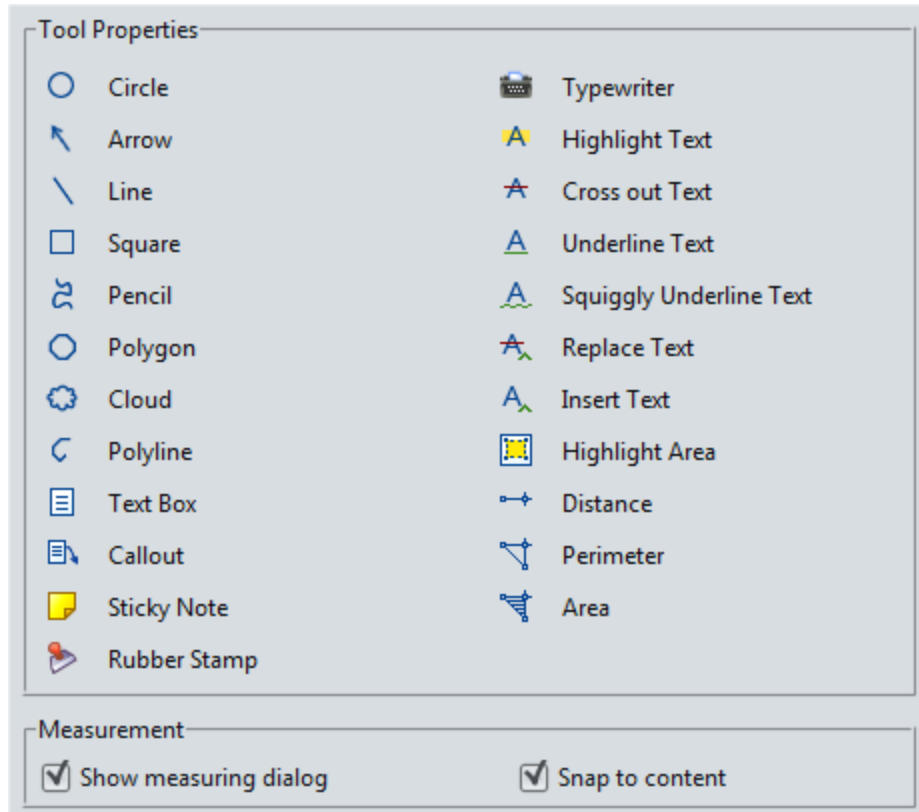
PDF Studio allows users to set default properties for each tool. These default properties are used when creating new annotations using the tool. Click on a tool to open its properties dialog:
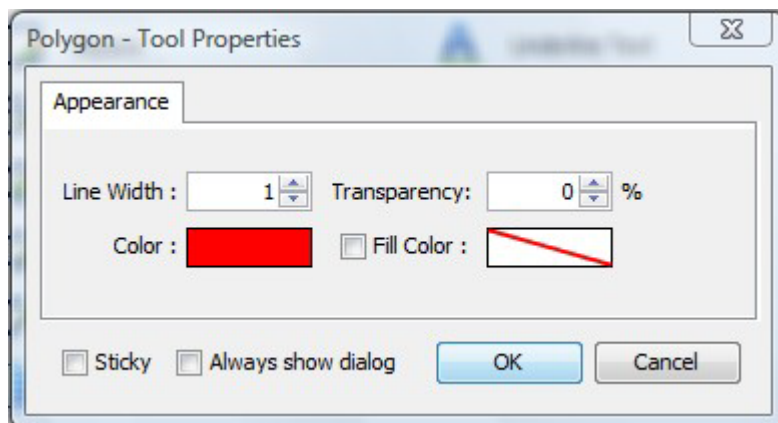
If Show Measuring Dialog is selected, a dialog with the measurement details will be displayed while measuring tools are in use.
If Snap to Content is selected, annotation vertices will snap to lines in documents.

Display

Set the layout and magnification for displaying the documents and choose a custom Look and Feel for PDF Studio.
Current Look and Feel options are displayed in our knowledge base.

Document Services

Set additional sources from which PDF Studio can open files.
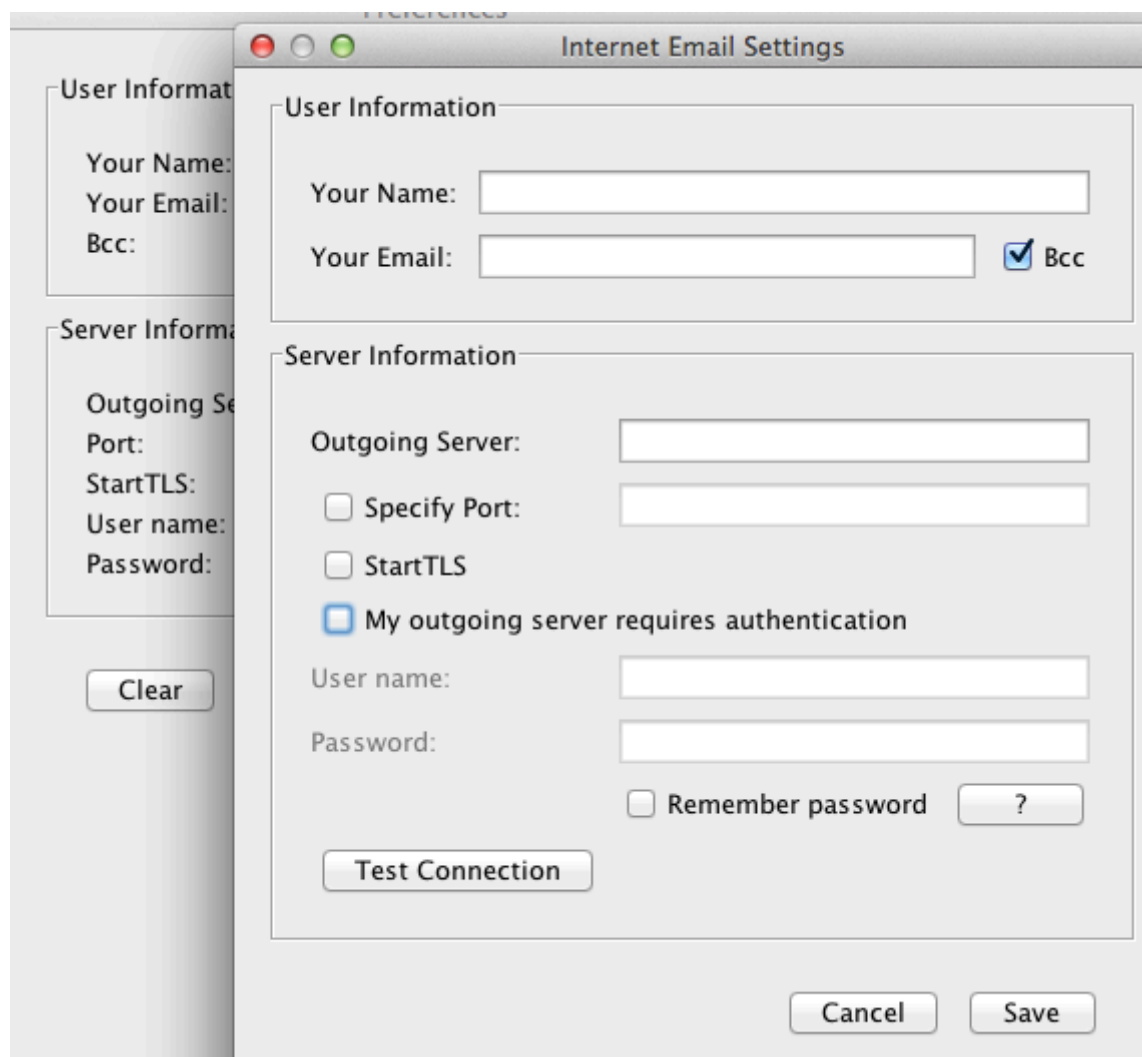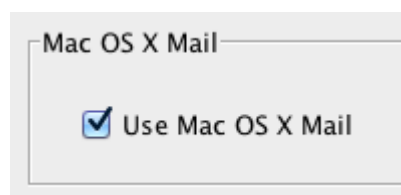
Email

Fill out the fields to enable sending PDFs via email from within PDF Studio.

OS X only:

Check to enable sending directly from Mail

Javascript

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

JavaScript

Enable JavaScript: Prompt

☐ Silence Errors
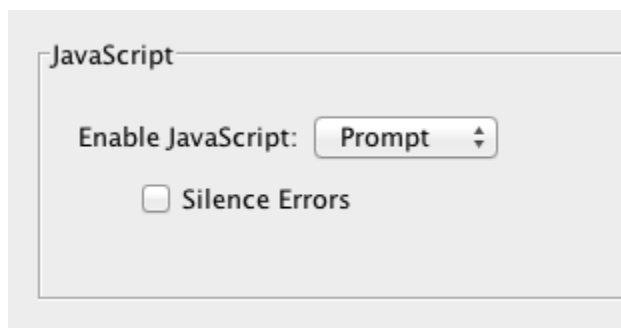
Print

Override default print settings

Rotation
☑ Auto Rotate

Margins
☑ Shrink To Margins

☐ Expand To Margins

Alignment
☑ Center In Page

Comments
☑ Print Comments
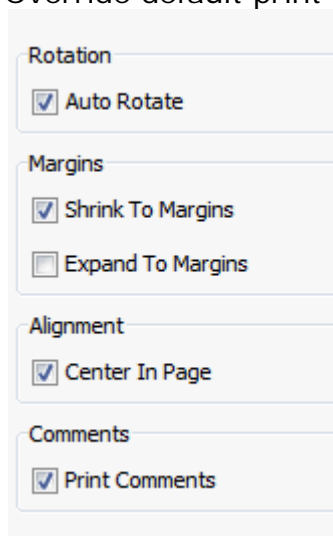
Scan

Set the default scanner and save location.

Scan To PDF
☐ Set default scanner – None –

Multiple Documents

Save Files To: [   ] [...]

Sign

Manage Trusted Certificates and Digital IDs.
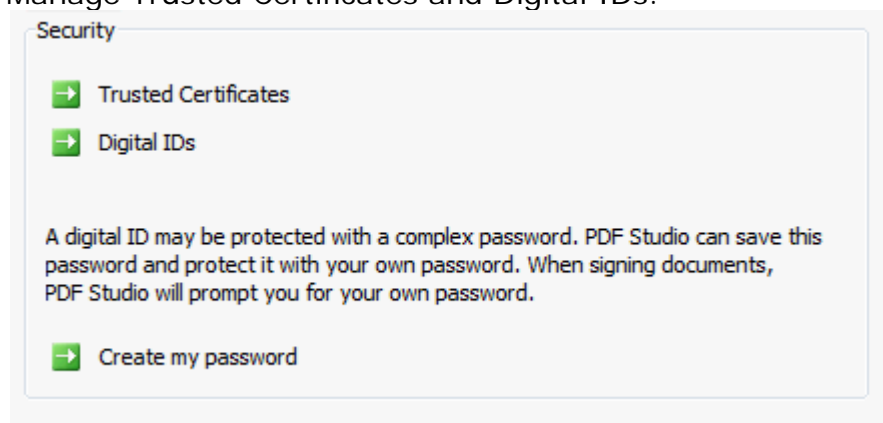
Text To PDF

Set the default Text To PDF settings for the output PDF files when text files are converted.
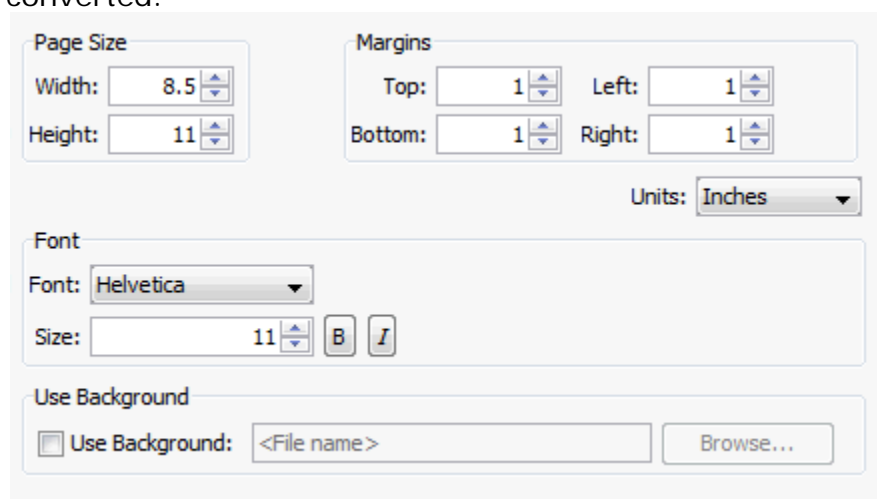
Toolbars

Customize toolbar visibility and grouping.

In the toolbar tree, check groups on or off to show or hide that toolbar group. Below, check groups on or off to automatically group those buttons into one. Click the down arrow on the side of the grouped button to access the other tools within.
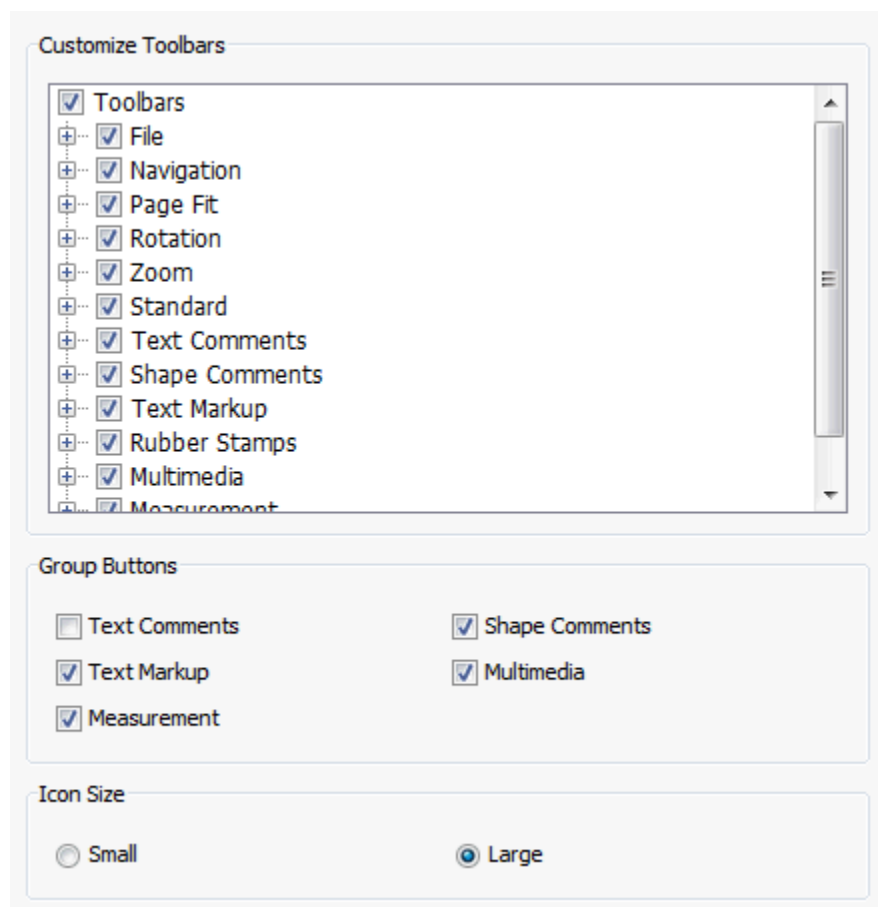
Grouped:
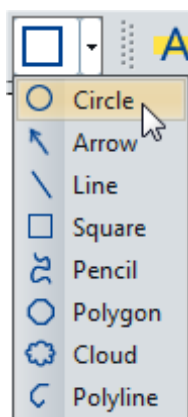
Not grouped:

Updates

Check for the updated version of PDF Studio and set the automatic check interval.

Updates

PDF Studio can check for updated versions of itself automatically. The check will be performed in the background and you will only be notified if a new version is available.

Check for updates | On every start ▾ |

Check Now
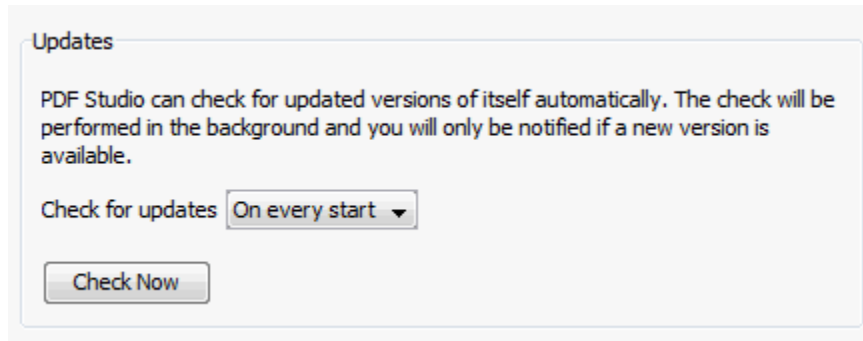
Keyboard Shortcuts

General Shortcuts

Action	Windows/UNIX	Mac
Close	ctrl + w	⌘ + w
Create blank PDF	ctrl + n	⌘ + n
Exit	ctrl + q	⌘ + q
Open	ctrl + o	⌘ + o
Print	ctrl + p	⌘ + p
Save	ctrl + s	⌘ + s
Save as	ctrl + shift + s	⌘ + shift + s
Undo	ctrl + z	⌘ + z
Redo	ctrl + y	⌘ + shift + y
Display complete folder path for document	n/a	⌘ or ctrl + click on window title

Document Shortcuts

Action	Windows/UNIX	Mac
Create bookmark	ctrl + b	⌘ + b
Crop pages	ctrl + shift + t	⌘ + shift + t
Document properties	ctrl + d	⌘ + d
First Page	home	home
Last Page	end	end
Next view	alt + →	alt + →
Previous view	alt + ←	alt + ←
Rectangular text selection	hold ctrl while dragging cursor	hold cmd while dragging cursor
Rotate clockwise	ctrl + shift + →	⌘ + shift + →
Rotate counter-clockwise	ctrl + shift + ←	⌘ + shift + ←
Rotate pages	ctrl + shift + r	⌘ + shift + r
Text search	ctrl + f	⌘ + f
Zoom to actual size	ctrl + 1	⌘ + 1

Zoom to fit page	ctrl + 0	⌘ + 0
Zoom to fit width	ctrl + 2	⌘ + 2

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 + d	⌘ + alt + d
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
Line	ctrl + alt + l	⌘ + alt + l
Pencil	ctrl + alt + p	⌘ + alt + p
Perimeter	ctrl + alt + r	⌘ + alt + r
Polygon	ctrl + alt + g	⌘ + alt + g
Polyline	ctrl + alt + y	⌘ + alt + y
Sound	ctrl + alt + s	⌘ + alt + w
Square	ctrl + alt + q	⌘ + alt + q
Sticky Note	ctrl + alt + n	⌘ + alt + n
Underline Text	ctrl + alt + u	⌘ + alt + u
Typewriter	ctrl + alt + w	⌘ + alt + w

Creating and Rearranging 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:

- From File – This option opens a file dialog that filters in all supported file types. Any non-PDF file selected will be converted to PDF format and then opened.
- From Multiple Files – This option opens the Create from Multiple Files dialog, which allows users to merge multiple documents in a single action. All supported non-PDF files are converted to PDF. The configuration options include setting open passwords, and adding a bookmark for each merged document in the output document. This can also be found at File > Combine Files.
- From Scanner – This option opens the Scan To PDF dialog.
- From Blank Page – This allows the user to create a new PDF Document with no content.

Merge and Split Documents

PDF Documents can also be created by Merging and Splitting Existing Documents in several ways.

- **Drag and Drop** – Supported file types can be inserted as new pages into an existing open document by dragging the file to the Thumbnail Pane. Also pages can 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.
- **Insert/Extract Pages** – There are menu options for Inserting PDF Pages into an open document (Document > Insert Pages), or Extracting Pages from an open document into a new PDF document (Document > Extract Pages).
- **Create PDF from multiple files** – The Create from Multiple Files dialog found under File >Create PDF > From Multiple Files allows users to merge multiple documents in a single action. All supported non-PDF files will be converted to PDF.
- **Advanced Split** 🅿️ – There is an option for creating Advanced Split configurations (Document > Split Pages).
- **Batch Merge** 🅿️ – Multiple files can be combined into one PDF using the Batch Merge option (Batch > Merge a Batch).

Supported File Types

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

- Image Files – files of type GIF, PNG, TIFF, and JPEG can be converted into PDF.
- Word Files – PDF Studio can convert Word .doc and .docx files into PDF.
- Text Files – .txt files can be converted to PDF. Users can also define Text To PDF settings in the Preferences Dialog.

Scan to PDF

With PDF Studio, you can scan images into an existing or new PDF document using any TWAIN compliant scanner.

To initiate scanning to PDF

1. Click on the scanner button on the toolbar, choose Document > Scan To PDF, or File > Create PDF > From Scanner from the menu and the program will guide you through scanning the image and then inserting the scan into the current document or into a new document:

2. Choose the TWAIN source. TWAIN is the standard software interface to any scanner hardware. Most every scanner comes with TWAIN drivers that are installed automatically when you install the scanner in your computer. Please refer to your scanner documentation if the program reports that there are no TWAIN sources available. After the scan button is pressed, the dialog box to let the user choose which scanner to use. The selection dialog will look something like this:
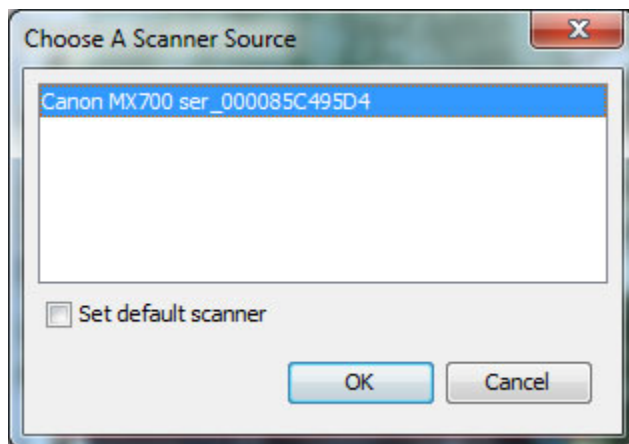
   The choices in the dialog box will vary according to the scanner(s) installed on your system. Choose a scanner from the list and click on the OK button to proceed. If there is an error with the selected scanner, the dialog will

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.

3. When the OK button is pressed, the program will open your scanner's custom scanning user interface. This is a separate program that will normally allow you to preview the scan, choose a region to scan and other options such as 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:

o •
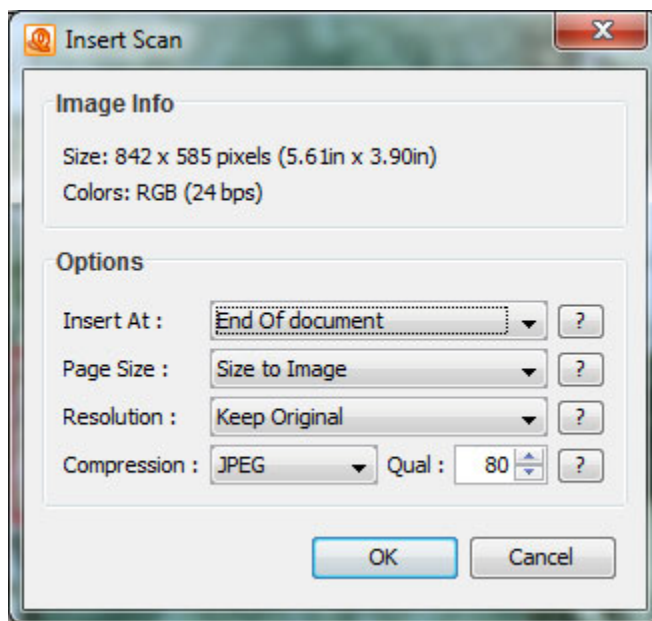
Insert At – Where to insert the new image. The choices are:
- End of Document – The image will be inserted at the end of the current document.
- Current Page – The image will be inserted after the current page.
- Beginning of Document – The image will be inserted as the first page in the current document.

- New Document – The program creates a new PDF document and inserts the image in the first page.
- 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. When selected, an option will appear to select after which page to start the interleaving.

- o Page Size – What size to use when creating a new page to hold the image. The options are:
  - 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 scanned image. 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.
- o Resolution – What resolution to use when saving the image into the PDF document. The choices are:
  - PDF Resolution (72DPI) – The image will be resized so that the resolution is 72 DPI. 72DPI is the standard resolution in PDF documents.
  - Keep Original – The image will be inserted at the scanned resolution. Keep in mind that scanners can scan images at very high resolutions (600+ DPI). If images are kept at their original resolution, the resulting PDF documents can be extremely large.
- o Compression – What compression to use when saving the image into the PDF document. The choices are:
  - JPEG (recommended compression)
  - Deflate (similar to Zip)
- o Qual (for JPEG compression only) – If using JPEG, the compression quality can be adjusted from 1 to 100%:
  - 1 = very high compression – very low quality
  - 100 = low compression – very high quality
    Suggested values are 80=high quality, 50=medium quality, 20=low quality

Modify PDF Pages

To start working with pages of PDF documents, click on the Document menu on the top toolbar. You can choose among the available options:

- Append Document – Append another PDF document to the current one.
- Insert Pages – Insert pages from another PDF document into the current one.
- Extract Pages – Extract pages from the current document into a new document.
- Replace Pages – Replace pages from the current document with pages from another document.
- Delete Pages – Delete pages from the current document.
- Rotate Pages – Rotate pages in the current document.
- Reverse Pages – Reverse the page order in the current document.
- Drag and Drop Pages - Drag pages within a document or across documents.
- Cut, Copy, and Paste Pages - Cut/Copy and Paste pages within a document or across documents.
- Add Headers and Footers such as Page numbers, Dates, Bates Numbers.
- Merge Multiple Documents [Pro]
- Split a Document into Multiple Documents Based on Bookmarks, Page Count, Text [Pro]

You can also move pages of a PDF document by dragging and dropping their thumbnails.

Append Document

To append another PDF document to the current one:

- Click on the Document menu on the top toolbar
- Choose the Append Document option
- The application will open a file chooser dialog. Browse to the PDF file you wish to append
- The document selected will be appended to the current one (all the pages from the document selected will be inserted at the end of the current document)

Insert Pages

To insert pages from another PDF into the current one:

- Click on the Document menu on the top toolbar
- Choose the Insert Pages option
- The application will open a file chooser dialog. Browse to the PDF file from which you wish to insert pages
- The application will open the Insert Pages dialog
- Fill in the options in the Insert Pages dialog
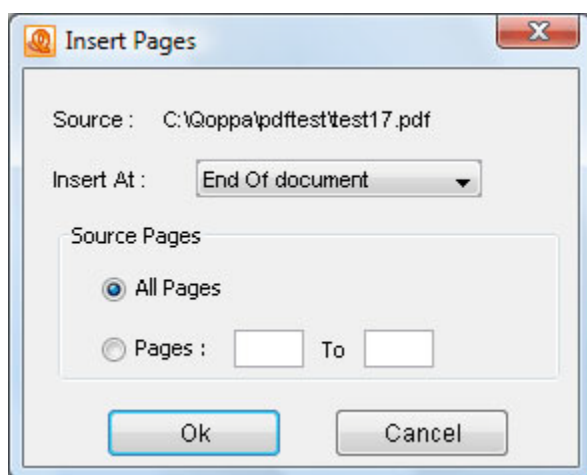
You can also insert pages from another PDF document by opening it and dragging the thumbnails of the desired pages into the current document.

Extract Pages

To extract pages from the current document:
- Click on the Document menu on the top toolbar
- Choose the Extract Pages option
- The application will open the Extract Pages dialog
- Fill in the options in the Extract Pages dialog
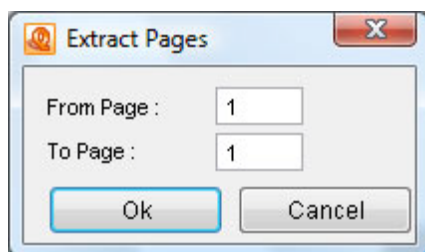
Replace Pages

To replace pages from the current document with pages from another document:
- Click on the Document menu on the top toolbar
- Choose the Replace Pages option
- The application will open a file chooser dialog. Browse to the PDF file from which you wish to get new pages
- The application will open the Replace Pages dialog
- Fill in the options in the Replace Pages dialog
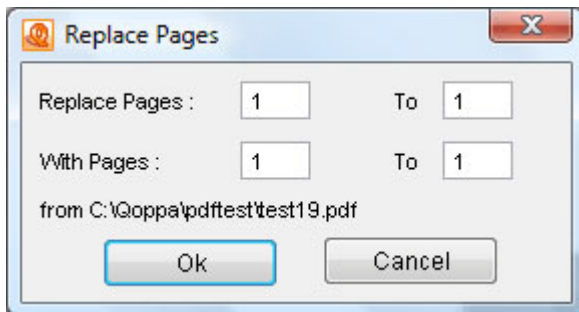
Delete Pages

To delete pages from the current document:
- Click on the Document menu on the top toolbar
- Choose the Delete Pages option
- The application will open the Delete Pages dialog
- Fill in the options in the Delete Pages dialog
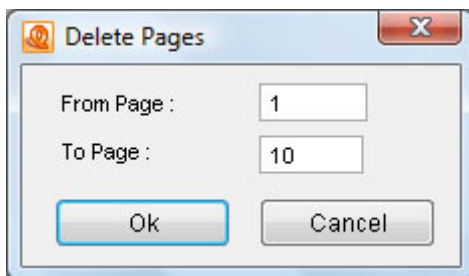
- To overwrite the current document, simply save the current document
- To create a new document, choose File > Save As and enter the name of the new document

Rotate Pages

To rotate pages in the current document:

- Click on the Document menu on the top toolbar
- Choose the Rotate Pages option
- The application will open the Rotate Pages dialog
- Fill in the options in the Rotate Pages dialog
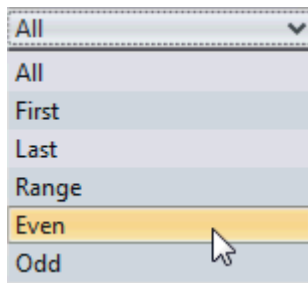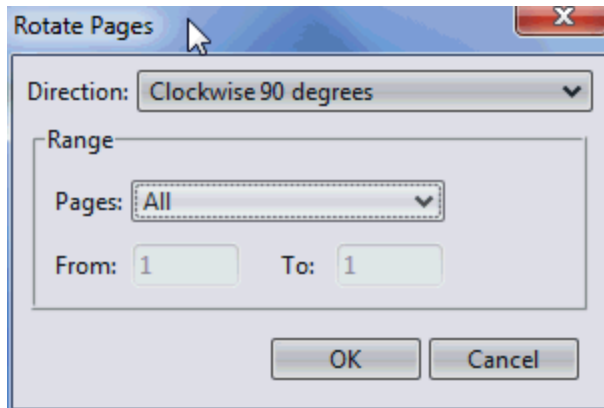
- Save the document to save the rotation of the pages

Note: This feature 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 top toolbar.

Reverse Page Order

To reverse the page order within the current document:

- Click on the Document menu on the top toolbar
- Choose the Reverse Pages option
- The application will automatically reverse the order of the pages in the open document

Drag and Drop

Move and reorder pages within a document: Use the mouse to select thumbnails from the Thumbnail Pane and then Drag thumbnail pages at the desired location in the Thumbnail Pane.

Copy page across documents: Use the mouse to select thumbnails from the Thumbnail Pane and drag thumbnail pages to the other document Thumbnail Pane to copy pages from a source document to a destination document.

Merge documents / insert documents: Documents of all supported file types can be inserted as new pages into a document by dragging files to the Thumbnail Pane directly.

Cut, Copy, and Paste Pages

Use the mouse to select thumbnail pages from the Thumbnail Pane and then:

- Right click (Mac: Ctrl+Click) or use keyboard shortcuts to **cut or copy the selected pages.**
- Right click (Mac: Ctrl+Click) or use keyboard shortcuts to **paste the selected pages** in the same document or into another document.

Split PDF Documents
Split a PDF document / Create a new split configuration
Split options
Split a document using an existing split configuration

Split a PDF document / Create a new split configuration

To split a PDF document:

1. Open the document that you would like to split. This is not a required step if you only wish to create a split configuration without applying it immediately.
2. From the top toolbar, go to Document > Split Document to show the Split dialog. In the combo box the name for the new split configuration shows as <New Item>.
3. Fill in the desired options for the current split configuration.
4. **To split the current document**, click on the Apply button at the bottom of the dialog. You do not need to save the split configuration before splitting a document.
5. To save the current split configuration for later reuse, click on the Save button below the name combo box. You will be prompted to enter a name for your new configuration.

All your previously split configurations appear in the drop down list in the combo box. Split configurations are saved as part of the user settings and can thus be accessed next time you launch a new session of PDF Studio.

Split Options

The Split Options dialog allows the user to set options when splitting a PDF document into multiple documents.

The dialog has the following sections:

- **General** – Options associated with the current split configuration.
    - o Name – Name of the configuration. The name is used on the drop down combo boxes and in the Split PDF menu.
    - o Show on Menu – Whether to show this split configuration on the Split PDF menu for fast 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:
    - o **Split into 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.
    - o **Split by page range** – 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.

- o **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.
- o **Split by bookmarks** – 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 goto page actions within the PDF document itself and that the bookmarks have been created in ascending page order.
- o **Split by 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.
- **Save Files To** – This section is about the output PDF files (the PDF documents obtained by splitting the incoming document)
  - o **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.
    - ▪ **New filename** – When this option is selected, you will need to enter a new filename used for 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).
- 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.
- When **Incremental Counter** option is chosen, PDF Studio will append an incremental counter. The counter will be reset for each new incoming PDF file.

- **Append Bookmark Name** – 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.
    - o **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.

Split a PDF document using an existing split configuration

There are 2 ways to apply an existing split configuration:

- From the Split dialog. Open the document that you would like to split. Open the Split dialog from Document > Split Document. Choose the split configuration 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 configurations that you have previously created. Note that only the ones for which you chose the Show on Menu option will appear on this list. Click on the split configuration in the list you'd like to apply.

Crop Pages

PDF Studio allows the user to adjust the crop box, bleed box, trim box, and art box on your PDF document. 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.

- 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.

The Crop Pages Dialog

To open the Crop Pages dialog, choose Document > Crop Pages from the top toolbar.
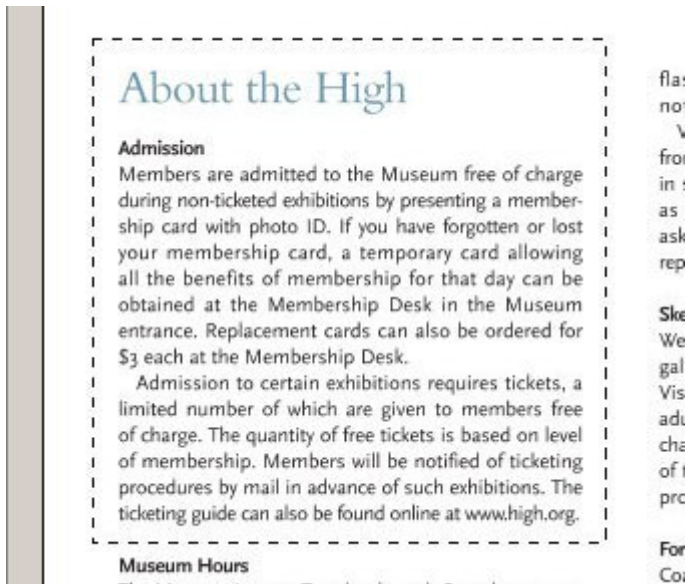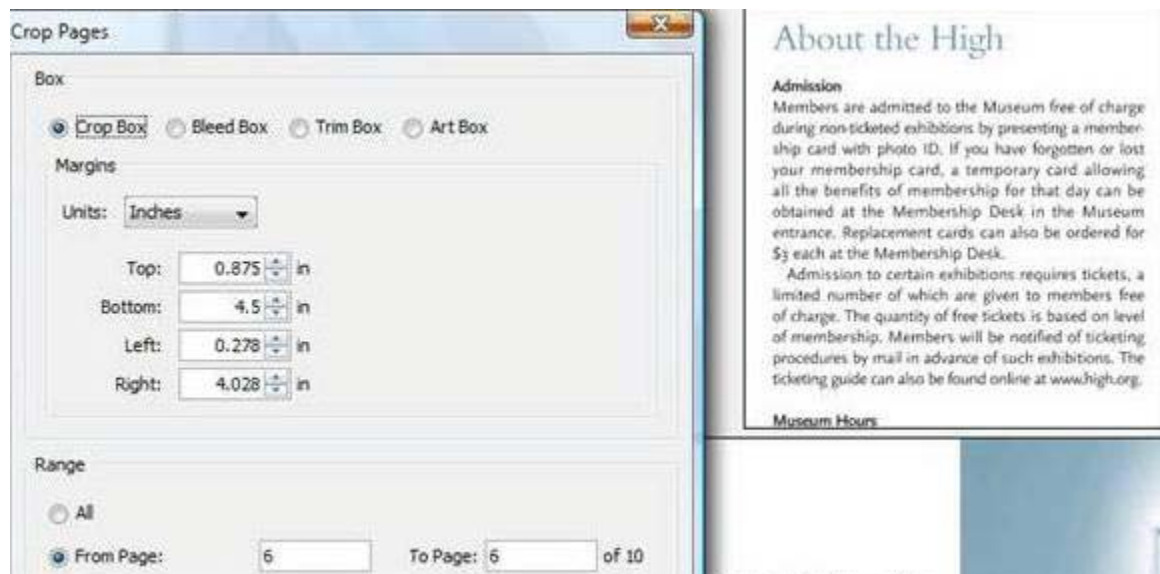

Crop Tool

To use the crop tool, select the crop tool icon from the toolbar.

After selecting the tool, drag the mouse over the page to select the area to be cropped.

When the mouse button is released, the page crop margins will be set such that only the selected area is visible and the crop dialog will open so that the cropping can be manually adjusted.

Headers and Footers
Create and apply a new header and footer
Fill header and footer options
Apply an existing header and footer
Apply an existing header and footer to a batch Pro

Creating and applying a new header and footer

To create a new header and footer:

1. Open the document to which you would like to add a header and footer. This is not a required step if you only wish to create a header and/or footer without applying it immediately. However, it is useful to be able to preview the header and footer on the document.

2. From the top toolbar, go to Document > Header & Footer > Add to show the Create Header & Footer dialog. In the combo box the name for the new header and footer shows as <New Item>.

3. Fill in the desired options for the header and footer.

4. As options are being changed, you can preview the header and footer on the document pages in the preview panes.

5. **To apply the header and footer** to the document, click on the Apply button at the bottom of the dialog. You do not need to save a header and footer before applying it to a document.

6. To save the header and footer for later reuse, click on the Save button below the name combo box. You will be prompted to enter a name for your new header.

All your previously saved headers and footers appear in the drop down list in the combo box. Headers & footers are saved as part of the user settings and can thus be accessed next time you launch a new session of PDF Studio.

Header and footer options

Headers and footers have a set of attributes that determine the properties of the text to add to the document. Attributes of the text include the font, size and style, foreground and background color, and more. It is also possible to add the header and footer to only a subset of pages in the document.

The options for a header and footer are as follows:

- General – Options associated with the current header and footer configuration
  - Name – Name of the header and footer. The name is used on the drop down combo boxes and in the Header & Footer menu.
  - Show on Menu – Whether to show this header and footer on the Header & Footer menu for easy access
- Margins
  - Units – What units to use when calculating the horizontal and vertical margins. This can be inches, centimeters, or points. Points are calculated in the PDF standard, 72 points per inch.
  - Top, Bottom, Left and Right margins.
- Appearance – Options that control the text
  - Font – Name of the font
  - Size – Font size in points
  - Color of the text
  - Bold/Italic – Use the B and I toggle buttons to make the text bold and/or italic

- o Border – Border of the text. If this is chosen, a box outline will be drawn around the text
- o Bgnd – Background color. Check this box and enter a background color to draw a box behind the text in the specified color.
- Pages
  - o All – The header and footer will be placed on all pages in the document
  - o Even – The header and footer will be placed only on the even-numbered pages of the document
  - o Odd – The header and footer will be placed only on the odd-numbered pages of the document
  - o First – The header and footer will be placed only on the first page of the document
  - o Last – The header and footer will be placed only on the last page of the document
  - o Range – The header and footer will be placed only on the pages in the specified range (e.g. Pages 7-20)
    - ▪ From and To – The range of pages on which the header and footer will be placed
- Header and footer – Text content for the different header and footer areas in the document
  - o Header Left
  - o Header Middle
  - o Header Right
  - o Footer Left
  - o Footer Middle
  - o Footer Right
  - o Date – choose and insert a date format
  - o Page Number – choose and insert page numbers in a chosen format
  - o Bates Number – insert a Bates number
  - o These are predefined keywords to allow users to refer to the current page, current date, etc.
    - ▪ $page – The page number
    - ▪ $author – The user logged in
    - ▪ $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

Apply an existing header and footer

There are 2 ways to apply an existing header and/or footer:

- From the Header and footer dialog. Open the document to which you'd like to apply a header and/or footer. Open the Header and Footer dialog from Document > Header & Footer. Choose the header from the drop down list in the combo box and click the Apply button at the bottom of the dialog. You can preview the header and footer before you decide to apply it.
- From the Header & Footer menu. Open the document to which you'd like to apply a header and footer. Under the Header & Footer menu, there is a list of all the Headers and Footers that you have previously created. Note that only the ones for which you chose the option Show On Menu will appear on this list. Click on the header and footer you'd like to apply from the list.

Removing a header and footer

To remove a header and footer: from the top toolbar, go to Document > Header & Footer > Remove to delete any removable headers and/or footers.

Watermarks
[Create a new watermark](#)
[Fill watermark options](#)
[Apply an existing watermark](#)
[Apply an existing watermark to a batch](#) [Pro]

Create and apply a new text or image watermark

To create a new watermark:

1. Open the document that you would like to add a watermark to. This is not a required step if you only wish to create a watermark without applying it immediately. However, it is useful to be able to preview the watermark on the document.
2. From the top toolbar, go to Document > Watermark > Create Watermark to show the Create Watermark dialog. In the combo box the name for the new Watermark shows as <New Item>.
3. Fill in the desired options for the watermark.
4. As options are being changed, you can preview the watermark on the document pages in the preview panes.
5. **To apply the watermark** to the document, click on the Apply button at the bottom of the dialog. You do not need to save a watermark before applying it to a document.
6. To save the watermark for later reuse, click on the Save button below the name combo box. You will be prompted to enter a name for your new watermark.

All your previously saved watermarks appear in the drop down list in the combo box. Watermarks are saved as part of the user settings and can thus be accessed next time you launch a new session of PDF Studio.

Fill watermark options

Watermarks have a set of attributes that indicated the watermark appearance on the document pages as well as what pages should be stamped.
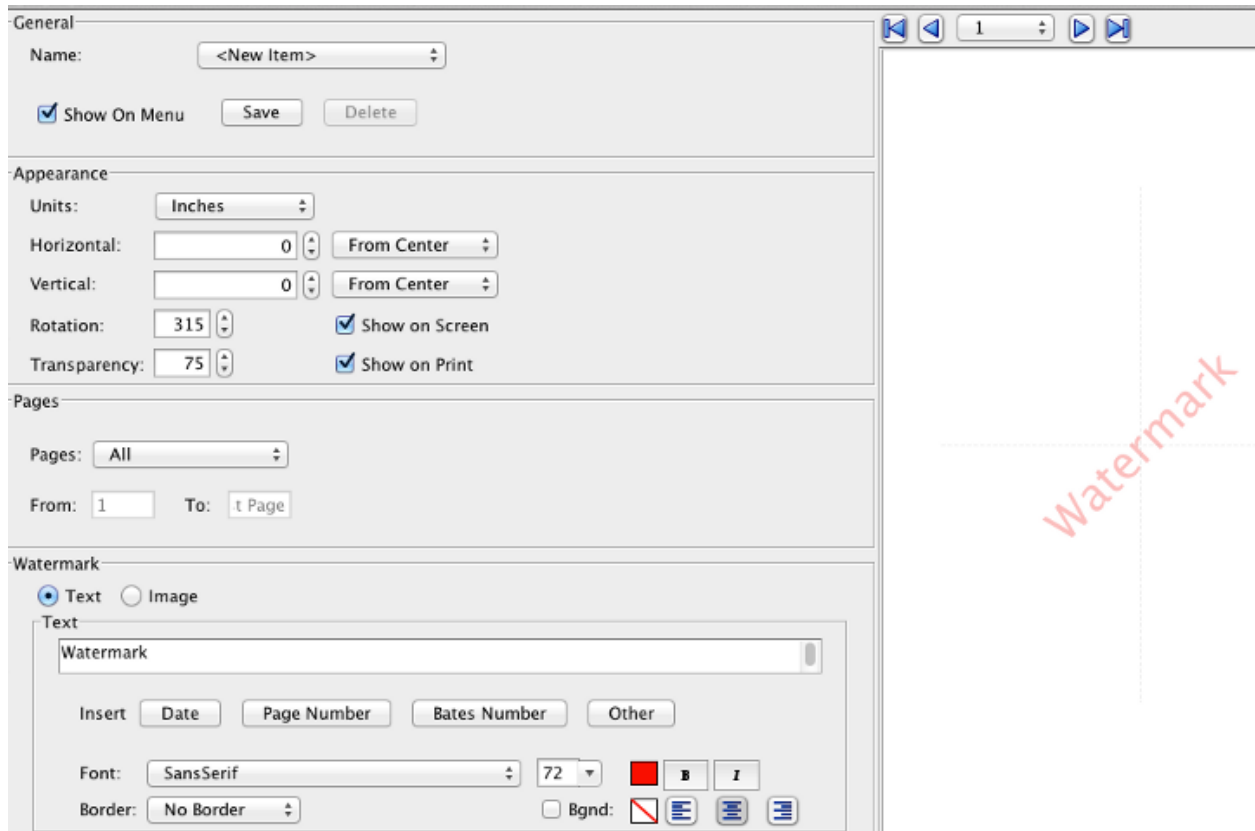
The options for a watermark are as follows:

- General – Options associated with the current watermark configuration.
    - o Name – Name of the watermark. The name is used on the drop down combo boxes and in the Watermark menu.
    - o Show on Menu – Whether to show this watermark on the Watermark menu for easy access.
- Appearance – Options that control the appearance on the page.
    - o Units – What units to use when calculating the horizontal and vertical locations. This can be inches, centimeters or points. Points are calculated in the PDF standard, 72 points per inch.
    - o Horizontal Location – 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.
    - o Vertical Location – 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.
    - o Rotate – Rotate the watermark (text or image) by the given degrees clockwise.

- o Transparency – Transparency of the watermark. 100% is invisible and 0% is opaque.
- Pages
  - o All – Watermark will be placed in all pages in the document.
  - o Even – Watermark will only be placed in even pages of the document.
  - o Odd – Watermark will only be placed in odd pages of the document.
  - o First – Watermark will only be placed in the first page of the document.
  - o Last – Watermark will only be placed in the last page of the document.
  - o Range – Watermark will only be placed in the specified range of pages.
    - ▪ From and To – Range of pages where the watermark will be placed.
- Text (when Text radio button is selected) – Options for a text watermark.
  - o Text for the watermark.
    - ▪ Click on the Date button to choose and insert a date format.
    - ▪ Click on the Page Number button to choose and insert page numbers in a chosen format.
    - ▪ Click on the Bates Number button to insert a Bates number. There are predefined keywords to allow users to refer to the current page, current date, etc.
      - o $page – The page number
      - o $author – The user logged in
      - o $totalpages – The number of pages in the document
      - o $filename – The file name that the document was opened from
      - o $filepath – The full file path that the document was opened from
      - o $date – The current date formatted as Nov 28, 2007
      - o $shortdate – The current date formatted as 11/28/07
      - o $time – The current time
      - o $day – The day of the month
      - o $month – The current month, using two digits
      - o $year – The current year, using four digits
      - o $shortyear – The current year, using two digits
      - o $second – The current second
      - o $minute – The current minute
      - o $hour – The current hour, 1-12

- o $ampm – AM or PM
- o $longhour – The current hour, 0-23
- o Font – Name of the font
- o Size – Font size in points
- o Color of the text
- o Bold/Italic – Use the B and I toggle buttons to make the text bold and/or italic
- o Border – Border of the text. If this is chosen, a box outline will be drawn around the text
- o Bgnd – Background color. Check this box and enter a background color
- o Justification – Left, Center, or Right. This only applies for multiline watermarks.
- Image (when Image radio button is selected) – Options for an image watermark
  - o File: The path to the image file. Accepted formats are jpg, png, gif.
    - ▪ Scale – The scale to apply to the image (100% for the full-size image

Apply an existing watermark

There are two ways to apply an existing watermark:

- 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.
- 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

To remove a watermark: from the top toolbar, go to Document > Watermark > Remove to delete any removable watermarks.

Integration with Acrobat.com, Google, Sharepoint

PDF Studio seamlessly integrates with Google Drive, SharePoint, and Acrobat.com, allowing users to access and manage files from their account.

Login
Logout
File Management
Open a file
Open a non-PDF file *
Save a file
Delete Files
Share *
View Documents *
Search Files *
Manage Collections *
Download Documents *
Upload Documents
Drag and Drop *

* = Google Drive only

Login

Sign in is required only once per PDF Studio session (a "session" begins will PDF Studio loads and ends when it closes), after which, the log in dialog will not appear for the rest of the session.

Logout

*Acrobat.com and Google Drive only

Pressing the logout button in the upper right of the dialog will log out the current user and the login dialog will be displayed the next time the user attempts to access the repository.
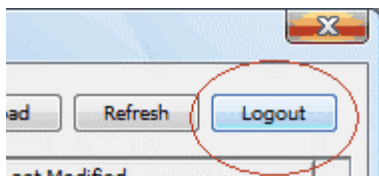
File Management

Open the file manager dialog by selecting one of the following:

File> File Manager - Google Drive
        File Manager - Acrobat.com

File Manager - SharePoint
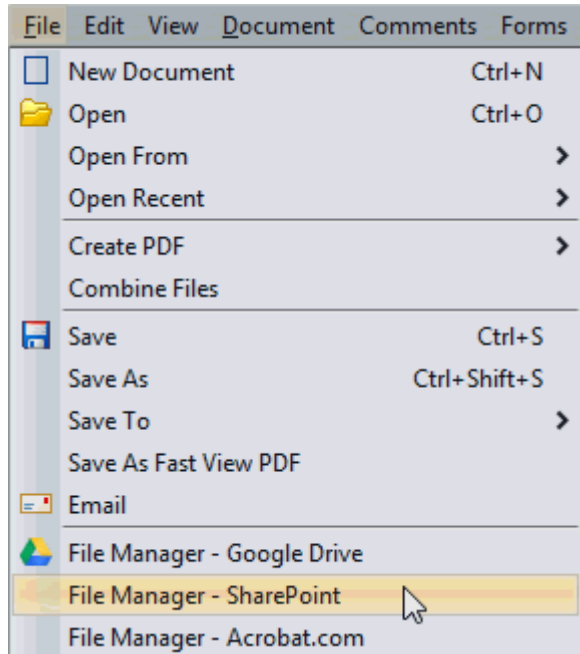
The file manager dialog is displayed:
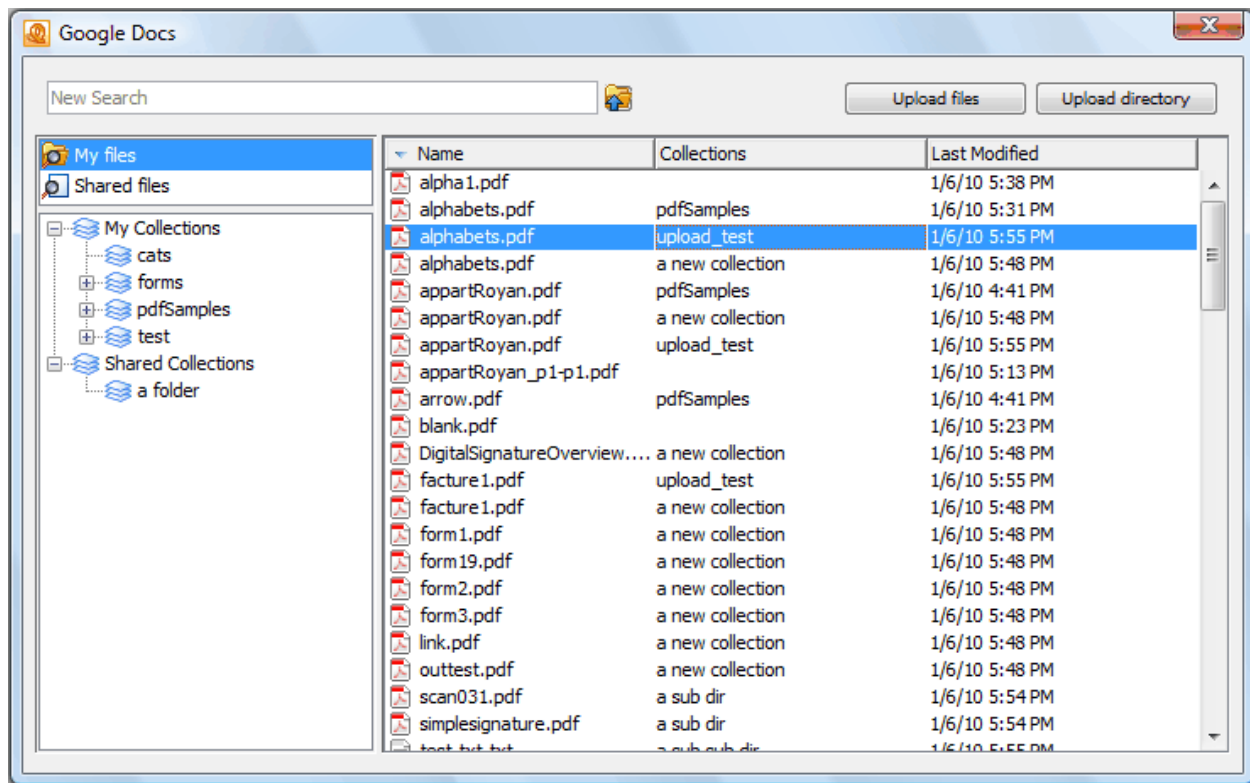
Open a File

Open the file chooser dialog by selecting: File->Open From->[Google Drive | SharePoint | Acrobat.com] or by clicking the arrow on the open icon and selecting [Google Drive | SharePoint | Acrobat.com].

This dialog can be used to view all files in the user's account. When the "open" button is pressed the selected file will be donwloaded and opened in PDF Studio.

Open a non-PDF File

*Google Drive only

Documents, spreadsheets, presentations, and image files are converted and opened as PDFs.
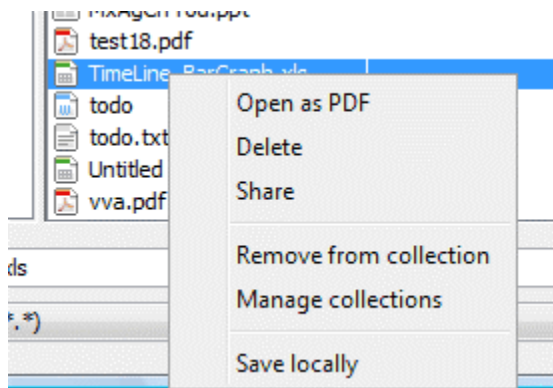
Save a File

Documents may be saved directly to the repository.
If an open document was loaded from the repository, pressing the save button
will save over the source doucment, similar to how changes to a document loaded from the local file system are saved when the save button is pressed.
The save dialog may be used to save an open document to the repository. Open the save dialog with File->Save to->[Google Drive | SharePoint | Acrobat.com]:
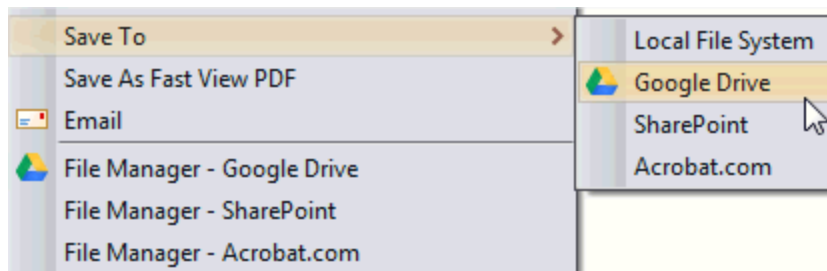
Or by clicking the arrow on the save icon and selecting [Google Drive | SharePoint | Acrobat.com]:
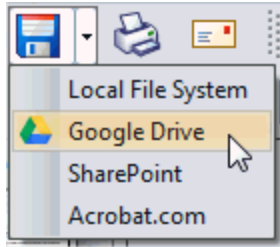
The save dialog is displayed.

Either select a file from the file table or enter a new file name, and press save. If an existing file is selected, a prompt will appear notifying that the file will be saved over.

Delete Files

Documents and Collections may be deleted by right clicking on a selection and choosing "Delete".

Deleting a collection, whether the collection is selected from the tree or the table, will the delete collection's entire hierachy (all its sub-collections will also be deleted). *Google Drive only
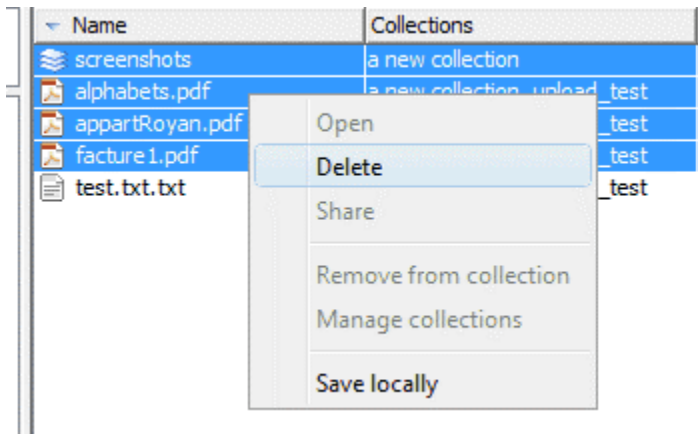
View Documents

*Google Drive only

When "My files" is selected, all documents will be displayed in the files table. When "Shared files" is selected, all documents shared with the user will be diplayed in the files table. If a specific collection is selected from the collection tree, the collections and files belonging to the selected collection are dipslayed in the files table.
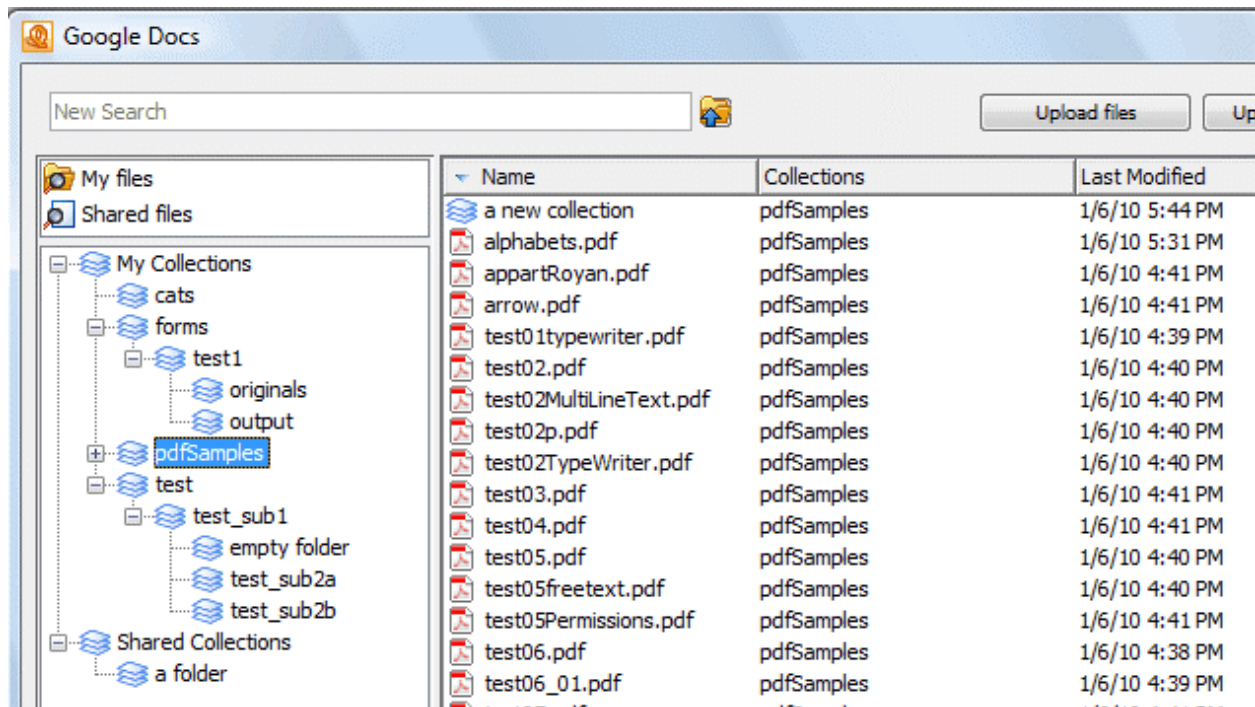
Search Files

*Google Drive only

Files can be filtered by typing in the search text field in the upper left of the dialog. As text is typed, only files that start with the search text will be displayed. For example, when "test0" is entered, only files beginning with "test0" are displayed:
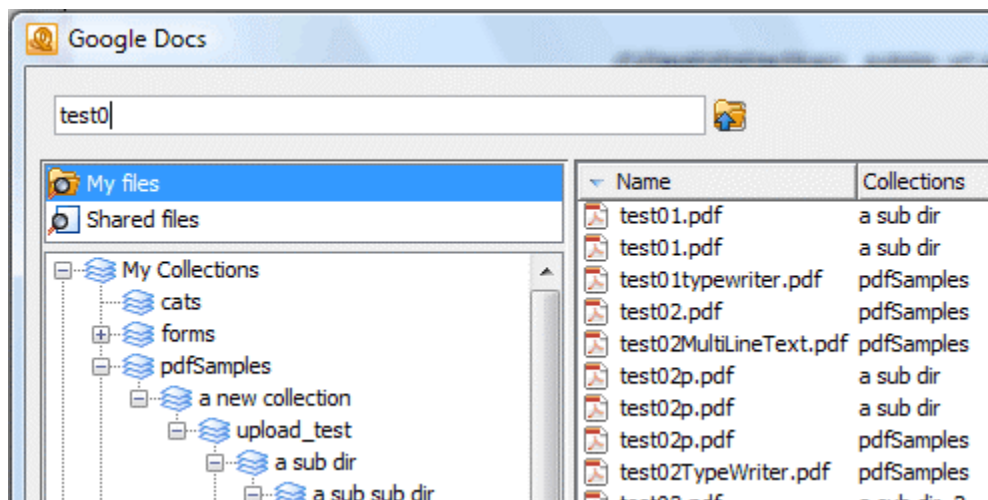
Add Collections

To add a new collection, right click on either a node in the collection tree and select "Create collection":
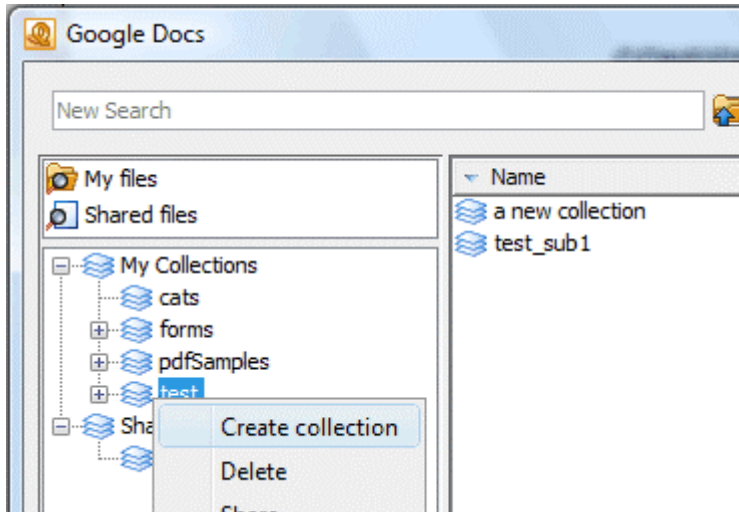
Enter a name for the new collection in the input dialog.

Manage Collections

*Google Drive only

A file may belong to multiple collections or none. To manage which collections a file belongs to, right click on the file and select "Manage collections".
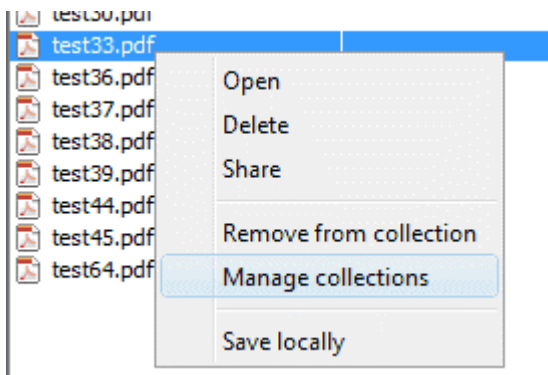
This will open the manage collections dialog:
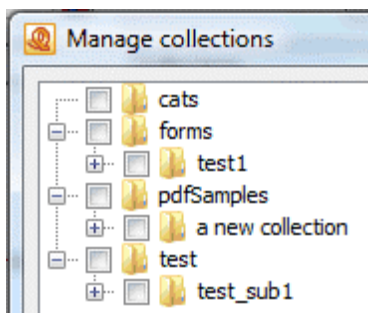
This dialog displays all the user's collections as a tree. Use this dialog to select the collections the file should belong to:
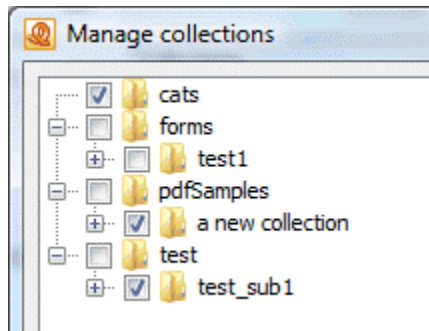
Press "OK" and the appropriate changes will be made:

Remove from Collections

To remove a document from the selected collection, right click on the document and select "Remove from collection".
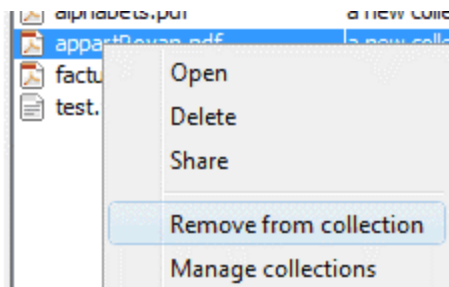
Share

*Google Drive only

Documents and collections can be shared with other Google Drive users. To view who access to a document or collection, right click on the item and select "Share":
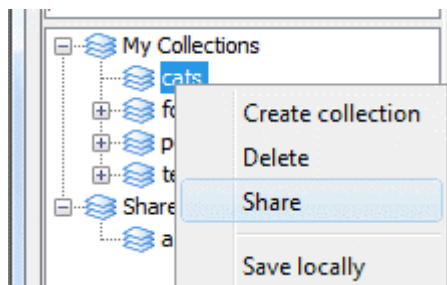
This will open a dialog which displays a list of users with access to the selected item:
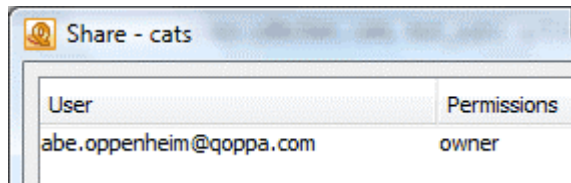
To grant access to another user, click the "add user" button.
Enter a valid email address, select the permissions to grant, and hit Ok.

Permissions may be modified for each user by selecting a new access level from the permissions drop down box:
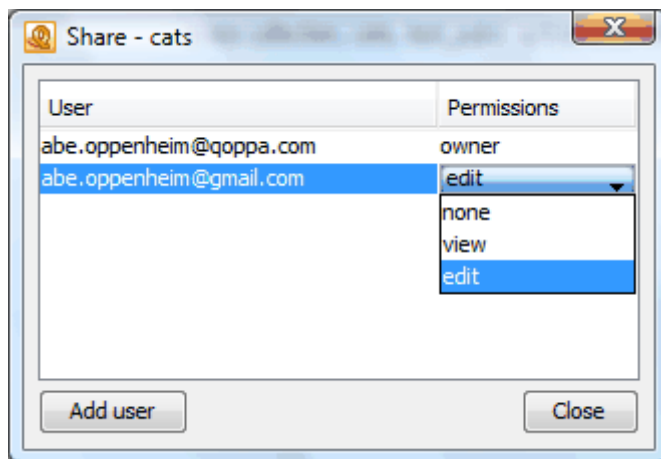
Download Documents

*Google Drive only

Documents and collections can be downloaded to the local file system. If a collection is selected, its entire contents (subcollections and documents) will be downloaded. Initate a download by right clicking on a selection of collection nodes or table rows and selecting "Save locally":
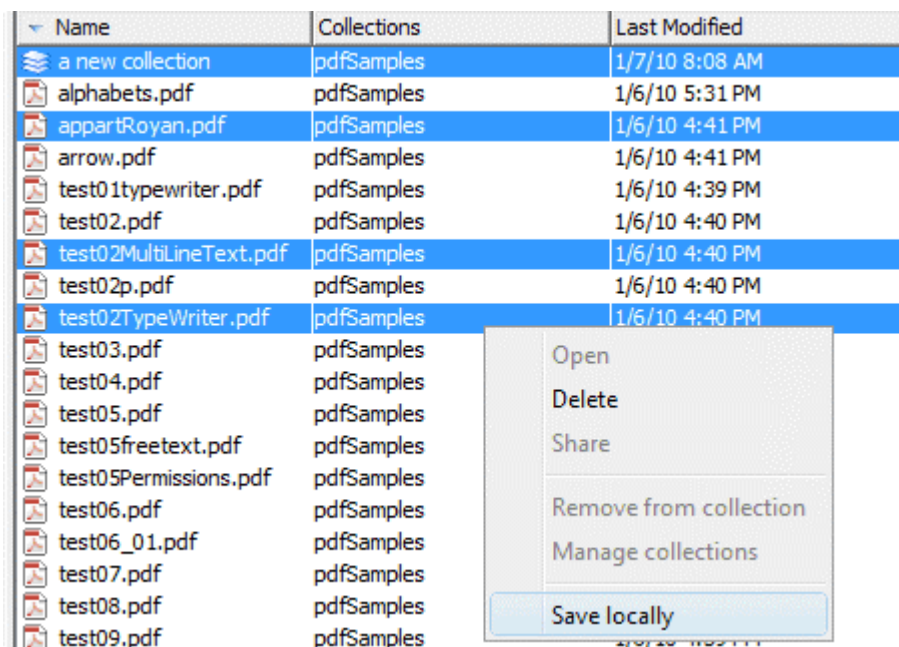
Select a directory to download to.

The download can be monitored or canceled via the progress dialog:
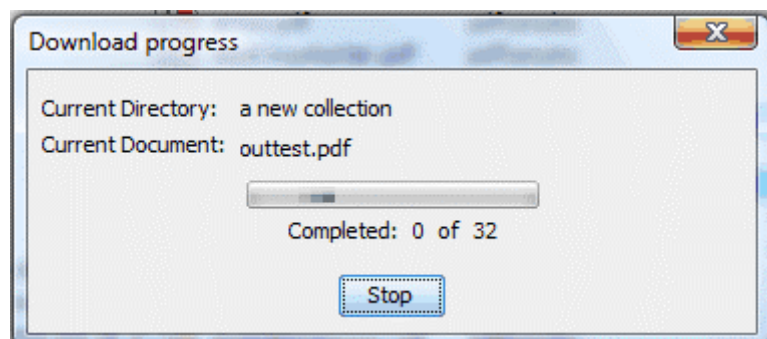
Upload Documents

Upload a List of Files

To upload a list of files, select a collection node from the tree to upload to. Either right click on the node and select "Upload Files" or press the "Upload Files" button in the upper right of the dialog.
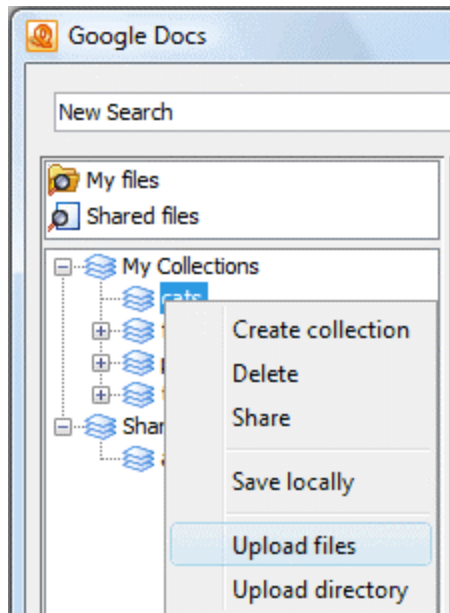
Use the "Choose Files" dialog to build the list of files to upload.

Click the "Add files" button to add indiviudal files to the List. Click the "Add folder" button to select a folder and add its entire contents to the list (if "Only add pdf files" is checked, only the pdf files in the selected folder will be added to the list). The trash and arrow keys remove and reorder items. Click "ok" to upload the list of files to the selected collection.

Upload a Directory

Alternatively, an entire directory structure may be uploaded. To upload a directory, select a collection node from the tree to upload to. Either right click on the node and select "Upload directory" or press the "Upload directory" button in the upper right of the dialog.
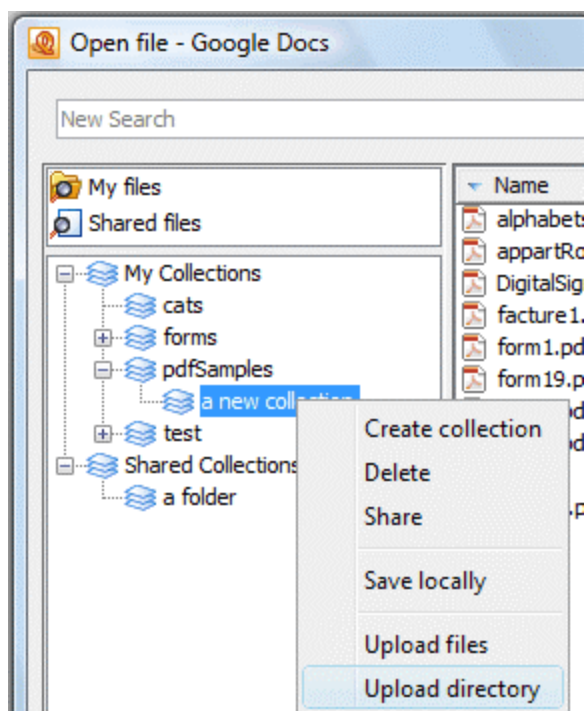
Select the directory to upload. Choose which files to upload from the tree:
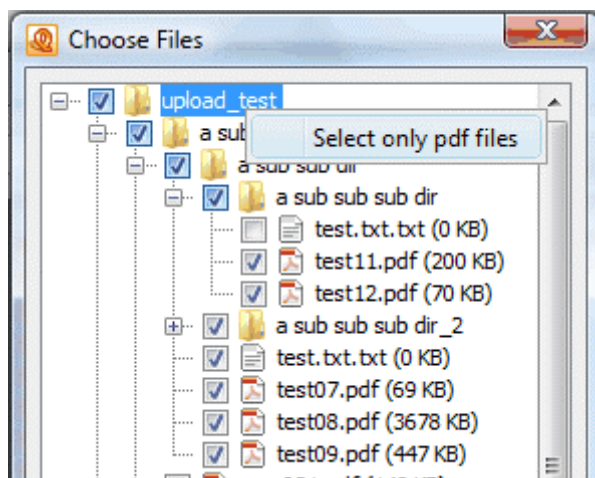
Initially, all files and folders are selected to be uploaded. De-select an item to prevent it from being uploaded. Right click on a tree node and press "Select only pdf files" to de-select any non-pdf files. Press "ok" to start the upload.
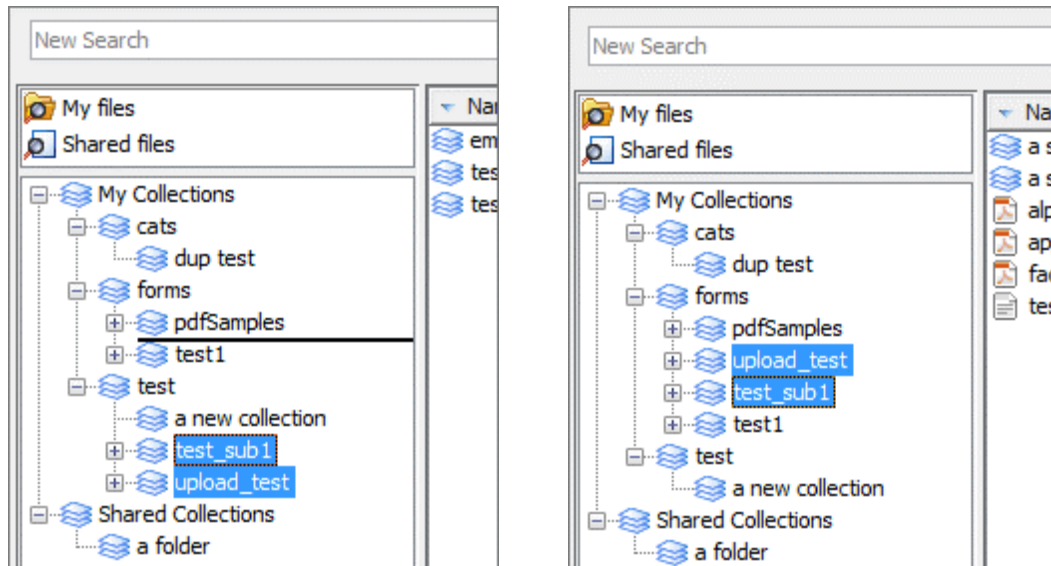
Drag and Drop

*Google Drive only

Drag and drop is supported for reorganization of collections, adding documents to a collection, and uploading.

Reorganize Collections

Reorganize the collection hiearchy by dragging and dropping a selection of tree nodes:

Adding Documents to a Collection

Add documents to a collection by dragging a selection of file rows onto a tree node. All selected files are added to the target collection:
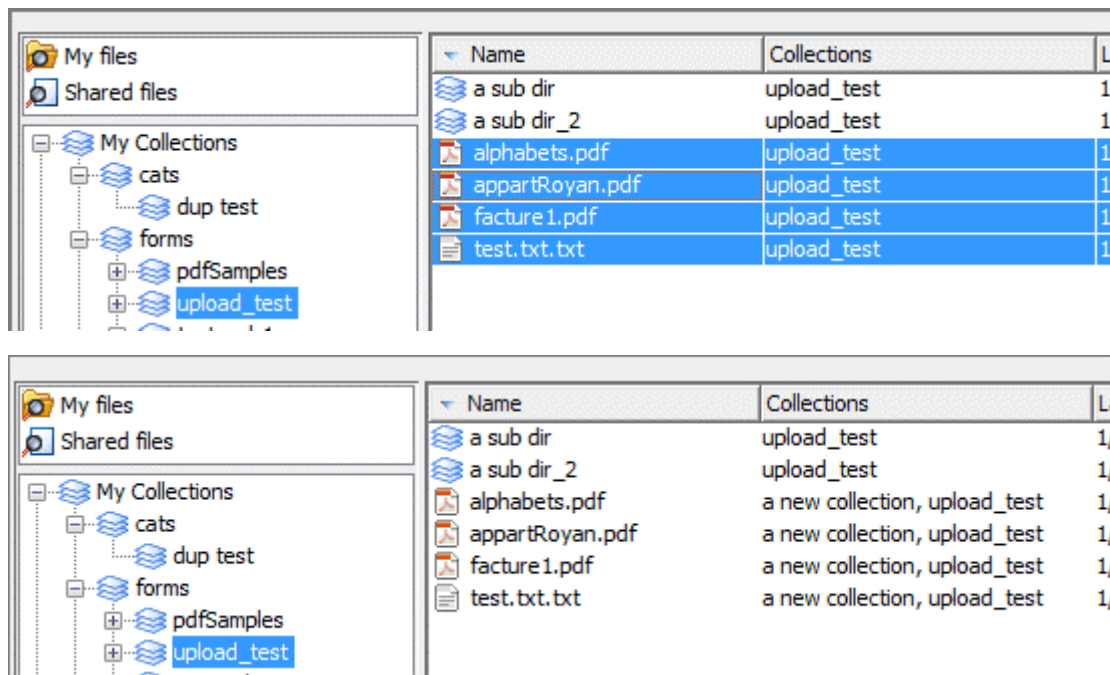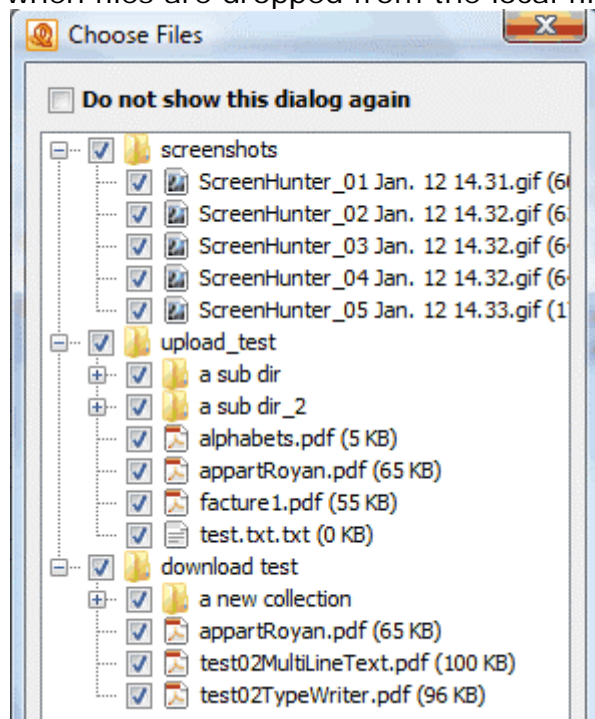
Uploading

Initiate file uploads by dragging files and folders from the local file system:
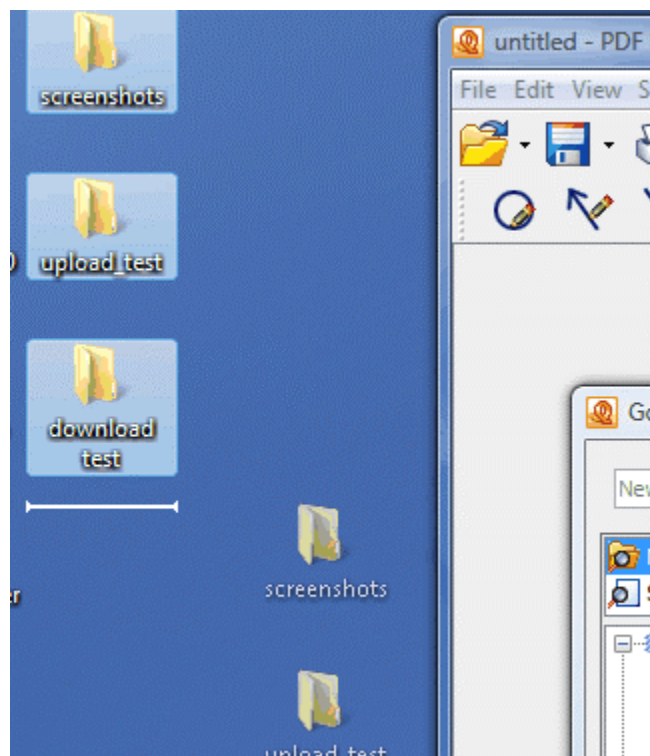
Dropping a selection of files/folders on a collection node will bring up the choose files tree.
This dialog has a checkbox to prevent the dialog from being displayed in the future when files are dropped from the local file system:

Comments and Annotations

PDF Studio allows you to comment or annotate a document with text, graphics, sound, and hyperlinks.

Create an annotation
Set tool properties
Update an annotation
Move or resize an annotation
Delete an annotation
Flatten annotation
Copy and pasting annotations
Group annotations
Paste a clipboard image
Paste clipboard text
Set a status or check mark
Hyperlink
Export annotations (Pro)
Import annotations (Pro)
Comments Panel

PDF Studio supports the following annotations:

	Text Annotations
▣	Text Box
▤	Callout
⌨	Typewriter
▨	Sticky Note
	Graphics Annotations
○	Circle
\	Line
↖	Arrow
☐	Square
○	Polygon
✿	Cloud
⌇	Pencil
Ϛ	Polyline
	Measurement Annotations
↦	Distance
⊽	Perimeter

⛏	[Area](#)
	[Media](#)
🔊	[Sound](#)
🔗	[Hyperlink](#)
▦	[Highlight](#)
📎	Attach File

Create an Annotation

There are two ways to create a new annotation:

1. From the annotations toolbar, simply click on the appropriate annotation tool, then place the mouse on the desired location on the page and draw the annotation by dragging the mouse on the screen.

2. From the top toolbar, choose Comments, select a comment category menu, click on the appropriate annotation, place the mouse on the desired location on the page, and draw the annotation by dragging the mouse on the screen.
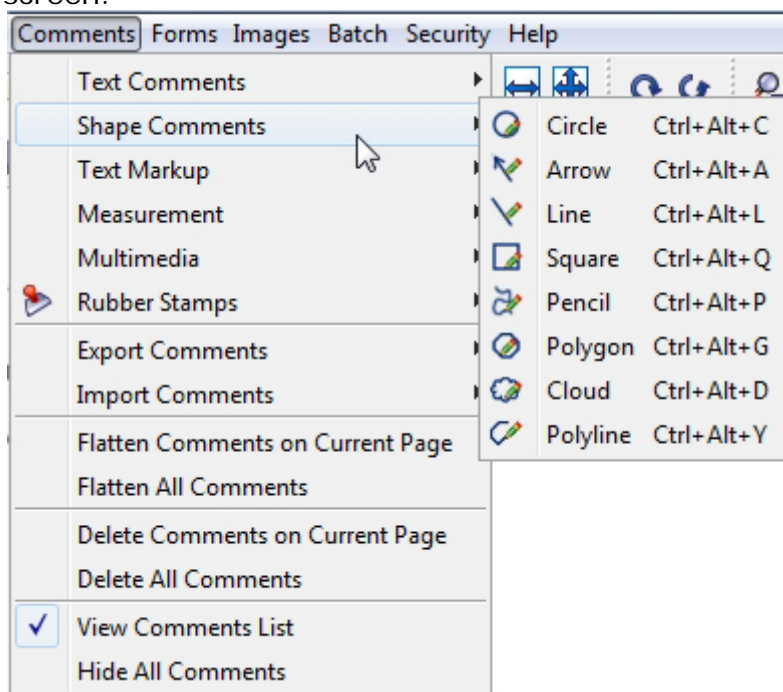
The selected tool's settings determine whether the annotation's property dialog is displayed after creating a new annotation and whether the tool remains selected.

Set Tool Properties

The tool's properties determine its default appearance and how the tool behaves after the annotation is created. The properties can be accessed by right-clicking the tool icon in the toolbar or by navigating to Edit > Preferences to open the user preferences.
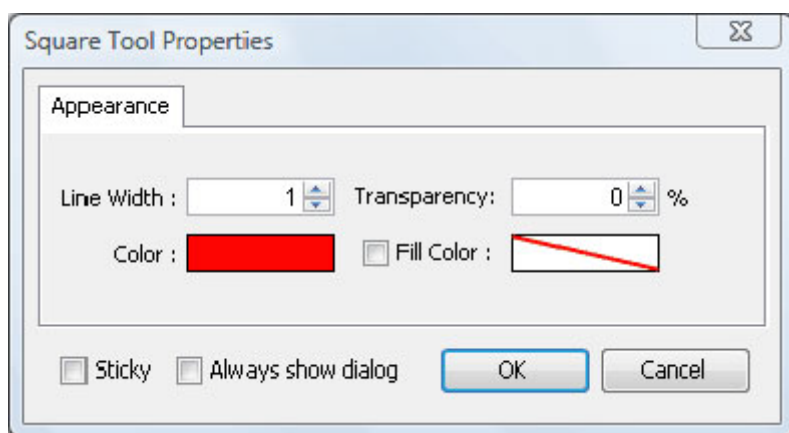
When the tool is "**sticky**," the tool remains selected after a new annotation is added to the document.

The **Always Show Dialog** check box determines whether the annotation properties dialog will be displayed after each new annotation is added to the document.

Update an Annotation

Edit any annotation, whether the annotation was created in PDF Studio or another software, such as Adobe Acrobat®.

To edit an annotation's properties, such as line width or color, right click (Mac: Ctrl+Click) on the annotation and choose Properties in the mouse menu. The annotation's properties dialog will be displayed. Each type of annotation has its own list of options.

Move or Resize an Annotation

To move an annotation, simply click on the annotation and move it to its new location on the page.

In the same way, **to change the bounds or shape of an annotation**, simply drag the mouse to change the bounds of the annotations to the new desired bounds.

Delete an Annotation

To delete a specific annotation:
Click on the annotation with the hand tool, right-click on the annotation (CTRL + Click on Mac), choose "Delete" in the context menu.

To delete all annotations:
From the top toolbar, choose Comments > Delete All Comments.

To delete all annotations on any given page:
From the top toolbar, choose Comments > Delete Page Comments.

Flatten an Annotation

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 paint an annotation on a 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.

To flatten a specific annotation:
Click on an annotation with the hand tool, right-click on the annotation (CTRL + Click on Mac), choose "Flatten" in the context menu.

To flatten all annotations on any given page:
From the top toolbar, choose Comments > Flatten Page Comments.

To flatten all annotations:
From the top toolbar, choose Comments > Flatten All Comments.

Copy and Paste Annotations

All annotations can be copied using Ctrl+c (Mac: Apple+c) and pasted using Ctrl+v (Mac: Apple+v) or by right clicking 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.

To paste an annotation onto a different page:
1. Navigate to the page.
2. Click on the page with the mouse to select the page.
3. Paste the annotation using Ctrl+v (Mac: Apple+v).
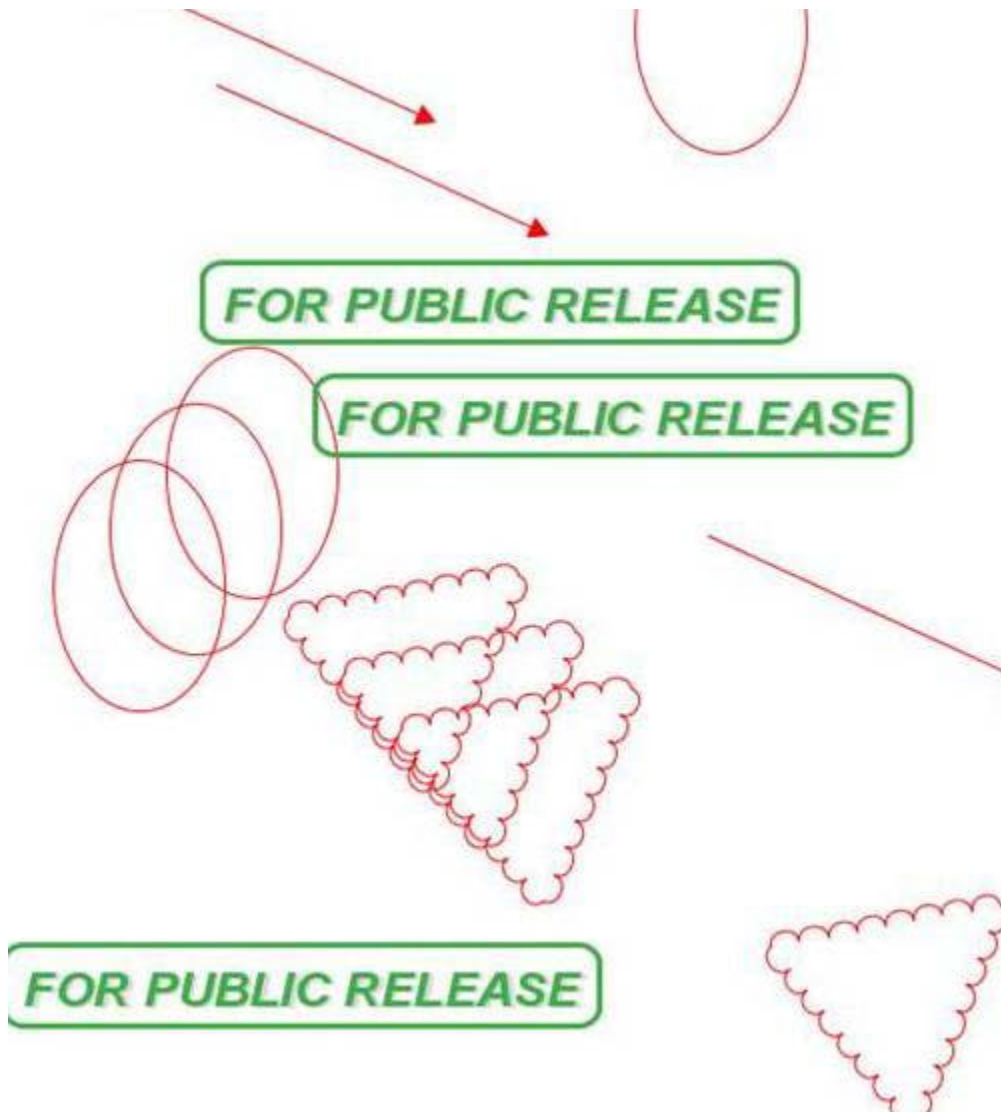
Group Annotations

A group of annotations is comprised of one parent annotations 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.

A group may be formed 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 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 can not be included in a group: sound and text replace annotations.

Paste a Clipboard Image 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: Apple+v) onto the page. Doing so will paste the image as a Rubber Stamp annotation that can be moved around or resized.

If Adjust To Zoom is selected in User Preferences, the initial size of the pasted image will depend on the zoom level of the document. Otherwise, the image will be initially pasted at its original size.

Paste 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: Apple+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.

Set 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.
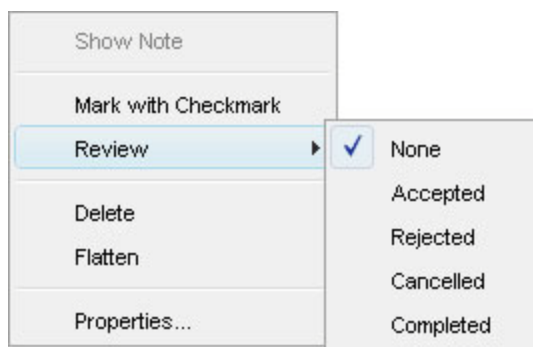
The review history is saved each time the annotation status is modified and can be viewed in the **Status History** tab on the annotation property dialog.

Text Annotations

🗐	Text Box
🗐	Callout
⌨	Typewriter
🗒	Sticky Note

Text Box

To create a text box annotation (also called free text annotation), follow the standard steps to create a new annotation.

Text Box Annotation Properties:
- Border Width
- Border Color
- Fill Color
- Text Color
- Text Horizontal Alignment (left, center, right)
- Text Vertical Alignment (top, center, bottom)
- Text Size, Bold, Italic
- Text Content

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

Callout

To create a callout annotation, follow the standard steps to create a new annotation.

Callout Annotation Properties:
- Border Width

- Border Color
- Fill Color
- Text Color
- Text Horizontal Alignment (left, center, right)
- Text Vertical Alignment (top, center, bottom)
- Text Size, Bold, Italic
- Text Content

Typewriter

To create a typewriter annotation, follow the standard steps to create a new annotation. You can then type directly on to the page to add text to the document. This feature is useful to add text to PDF documents that do not have interactive forms.

Typewriter Properties:
- Text Color
- Text Font, Size, Bold, Italic

Sticky Note

To create a sticky note annotation, follow the standard steps to create a new annotation.

Sticky Note Properties:
- Sticky Note Icon Color
- Transparency Percentage (100% transparent is invisible, 0% is completely opaque)
- 'Open Initially' Flag indicates whether the sticky note should be showing when the document is first open.
- Annotation Note or Comment (optional)

Graphics Annotations

○	Circle
\	Line
↖	Arrow
□	Square
⬡	Polygon
✿	Cloud
⅏	Pencil

↻ [Polyline](#)

Circle

To create a circle annotation, follow the standard steps to [create a new annotation](#).

Circle Annotation Properties:
- Line Width
- Transparency Percentage (100% transparent is invisible, 0% is completely opaque)
- Color of the circle border
- Color of the inside of the circle
- Annotation note or comment (optional)

Line

To create a line annotation, follow the standard steps to create a new annotation.

To draw horizontal, vertical, or lines at 45 degrees, press and hold the Shift key while drawing the annotation.

Line Annotation Properties:
- Line width
- Transparency percentage (100% transparency is invisible, 0% is completely opaque)
- Color of the line
- Line Start Icon, none by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow
- Line End Icon, none by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow.
- Annotation note or comment (optional)

Arrow

To create an arrow annotation, follow the standard steps to [create a new annotation](#).

To draw horizontal, vertical, or lines at 45 degrees, press and hold the Shift key will drawing the annotation.

Arrow Annotation Properties:
- Line Width
- Transparency Percentage (100% transparent is invisible, 0% transparent is completely opaque)

- Color of the Line
- Line Start Icon, none by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow.
- Line End Icon, an Open Arrow by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow.
- Annotation Note or Comment (optional)

Square

To create a square annotation, follow the standard steps to [create a new annotation](#).

Square Annotation Properties:
- Line Width
- Transparency Percentage (100% transparent is invisible, 0% is completely opaque)
- Color of the border of the square.
- Color of the inside of the square.
- Annotation note or comment (optional)

Polygon

To create a polygon annotation, follow the standard steps to [create a new annotation](#).

Polygon Annotation Properties:
- Line Width
- Transparent percentage (100% transparent is invisible, 0% is completely opaque)
- Color of the border of the polygon
- Color of the inside of the polygon
- Annotation Note or Comment (Optional)

Cloud

To create a cloud annotation, follow the standard steps to [create a new annotation](#).

Cloud Annotation Properties:
- Line Width
- Transparency percentage (100% transparent is invisible, 0% is opaque)
- Color of the border of the cloud
- Color of the inside of the cloud
- Annotation note or comment (optional)

Pencil

To create a pencil annotation, follow the standard steps to create a new annotation.

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.

Pencil Annotation Properties:
- Line Width
- Transparency (100% transparent is invisible, 0% is completely opaque)
- Color of the pencil
- Annotation note or comment

Polyline

To create a polyline annotation, follow the standard steps to create a new annotation.

Polyline Annotation Properties:
- Line Width
- Transparency (100% transparent is invisible, 0% is completely opaque)
- Color of the line
- Annotation note or comment

Measurement

⊢→	Distance
⟍⟋	Perimeter
⟍⟋	Area
	Calibration

Distance

To create a distance annotation, follow the standard steps to create a new annotation. The Distance Measurement dialog will be displayed, which is used to set the scale and precision for the measurement. These values must be set prior to drawing the annotation. They may not be modified after the annotation is finished.

Measurement

Distance: 4.43 in   Δ X: 4.42 in
   Angle: 2.94°   Δ Y: 0.23 in
   Scale: 1 in = 1 in

Scale

[1] [in ▼] = [1] [in ▼]

Precision: [0.01 ▼]   [Calibrate]

To draw horizontal, vertical, or lines at 45 degrees, press and hold the Shift key while drawing the annotation.

To set scale from drawing, click Calibrate button and follow the steps to calibrate.

Distance Annotation Properties:
- Line Width
- Transparency percentage (100% transparent is invisible, 0% is completely opaque)
- Color of the line
- Line Start Icon, none by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow.
- Line End Icon, an Open Arrow by default. Available icons are Square, Circle, Diamond, Open Arrow, Closed Arrow.
- Annotation note or comment is disabled for distance annotations.

Perimeter

To create a perimeter annotation, follow the standard steps to create a new annotation. The Perimeter Measurement dialog will be displayed, which is used to set the scale and precision for the measurement. These values must be set prior to drawing the annotation. They may not be modified after the annotation is finished.

Measurement

  Distance: 0.71 in   Δ X: 0.44 in
     Angle: 51.2°   Δ Y: 0.55 in
Perimeter: 4.17 in
     Scale: 1 in = 1 in

Scale

[1] [in ▼] = [1] [in ▼]

Precision: [0.01 ▼]   [Calibrate]

To draw horizontal, vertical, or lines at 45 degrees, press and hold the Shift key while drawing the annotation.

To set scale from drawing, click Calibrate button and follow the steps to calibrate.

Perimeter Annotation Properties:
- Line Width
- Transparency percentage (100% transparency is invisible, 0% is completely opaque)
- Color of the line
- Annotation note or comment is disabled for perimeter annotations.

To create a Perimeter annotation from an Area annotation, right click the Area and select "Create Perimeter" or "Convert to Perimeter". This will result in a perimeter measurement based on the exact same selection that was used to create the area.

Area

To create an area annotation, follow the standard steps to create a new annotation. The application will then display the Area Measurement dialog where you can set the scale and precision for the area measurement. The scale must be set **before** you begin drawing the annotation. Once the area annotation is created, the scale cannot be modified. The scale can be set using decimals or fractions.

To draw horizontal, vertical, or lines at 45 degrees, press and hold the Shift key while drawing the annotation.

To set scale from drawing, click Calibrate button and follow the steps to calibrate.

Area Annotation Properties
- Line Width

- Transparency percentage (100% transparency is invisible, 0% is completely opaque)
- Color of the line
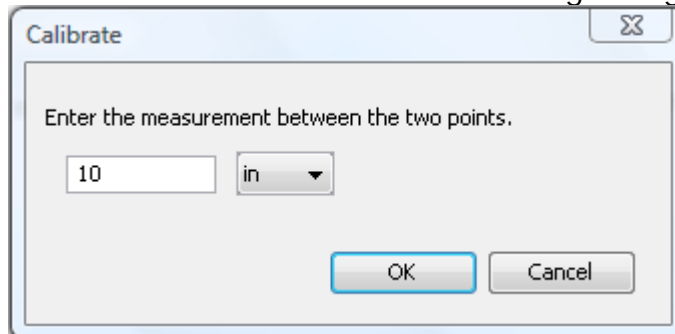- Annotation note or comment is disabled for perimeter annotations

Calibration

Set the scale directly from measurement tools.

To calibrate:

1. Create a measurement annotation (Distance, Perimeter, or Area) and click Calibrate button.

2. Choose two points on the document. Click OK and draw a line.

   Calibrate

   Select two points to calibrate the measuring tool.

   ☐ Do not show this dialog again

   OK
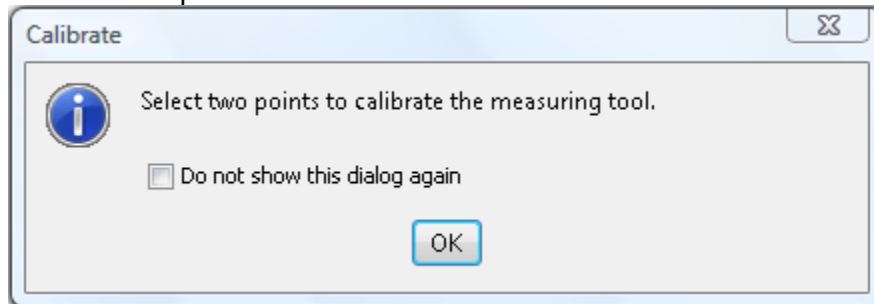
3. Enter the measurement in the following dialog.

   Calibrate

   Enter the measurement between the two points.

   10   in ▼

   OK   Cancel

4. The new scale will show up in the measurement dialog now
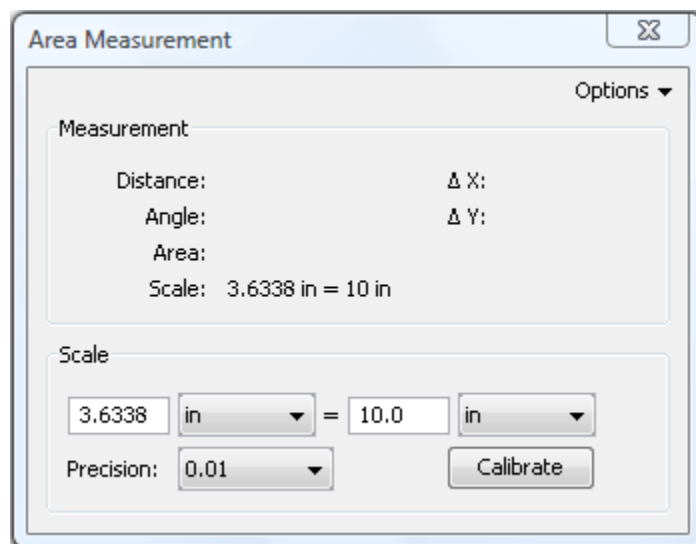
Media, Miscellaneous

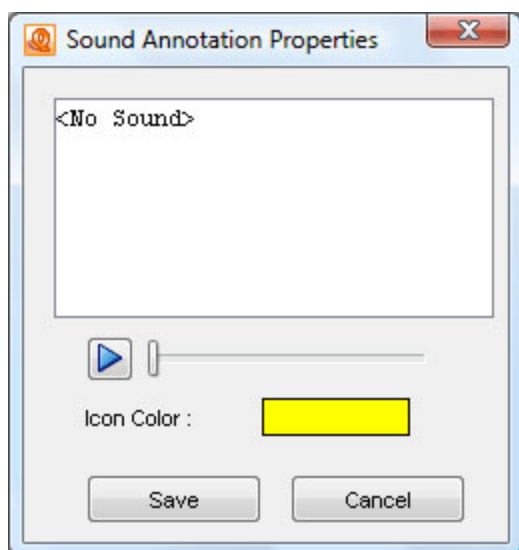|	
	Sound
	Hyperlink
	Highlight
	Attach File

Sound

Sound Recording or Importing

When you add a Sound Annotation to a page (by following the standard instructions to create an annotation), the Sound Recorder dialog pops up. You have the following options to add the sound data:

- **Record an audio comment from a microphone:** Choose the microphone in the microphone combo box. Then click the arrow button to start recording from a microphone and the red circle button to stop the recording.

- **Load an audio comment from a file:** Click the load file button and browse to the appropriate sound file. Supported formats are .au, .aiff, .wav.
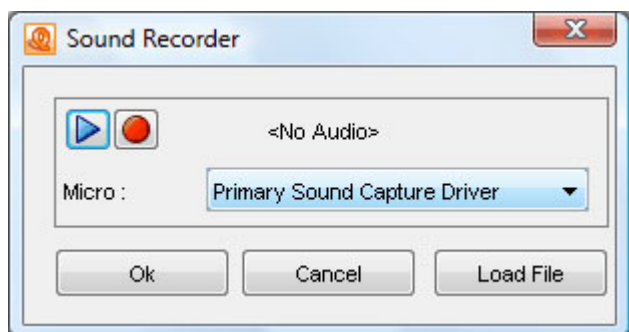
Sound Annotation Properties: Once the sound has been recorded or imported from a file, the application will open the Sound Annotations properties dialog. This dialog is also accessible by right-clicking (Mac: Ctrl-click) on an existing sound annotation and choosing the **Properties** option. The only option available for the Sound Annotation is the color of the speaker icon. You can change it by clicking the color button.

Hyperlink

Add a hyperlink

Highlight

A highlight annotation is simply a square annotation with a transparent background and no border (line width = 0).

Add a highlight annotation to a page by following the standard instructions to create an annotation. After the annotation is added, the Highlight Properties dialog is displayed.

68

Highlight Properties are the same as the <u>Square Properties</u>.

Import Annotations

Import data from a file into the current form fields. The file can be in FDF or XFDF format. Comments from <u>Text Annotations</u>, <u>Graphics Annotations</u>, and <u>Sound Annotations</u> will be imported. <u>Hyperlinks</u> are not considered comments in PDF format and thus are not imported.

To import comments:
1. From the top toolbar, choose Comments > Import
2. Select whether to import in FDF or an XFDF format
3. The application will open a file chooser dialog. Select the file you wish to import from.

Export Annotations

Export comments from the current document into a file in FDF or XFDF format. Comments from <u>Text Annotations</u>, <u>Graphics Annotations</u>, and <u>Sound Annotations</u> will be exported. <u>Hyperlinks</u> are not considered comments in PDF format and thus are not exported.
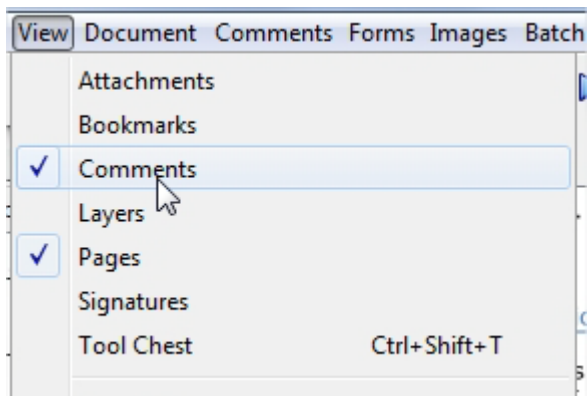
To export comments:
1. From the top toolbar, choose Comments > Export
2. Select whether to export in FDF or XFDF format
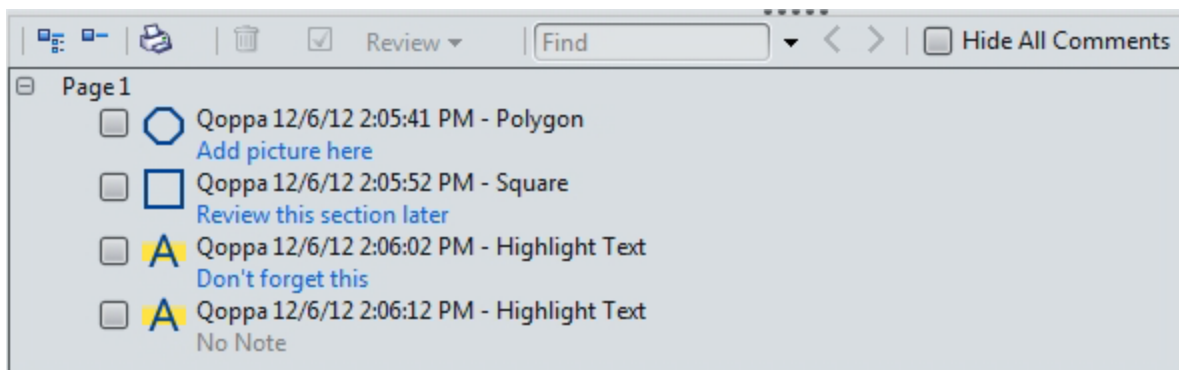3. The application will open a file chooser dialog. Select the file you wish to export to.

Comments Panel

View the comments panel by selecting View > Comments.

PDF Studio 8 User Guide

From this panel, you can view, search, and modify all the comments in the document.

Text Search and Markup Annotations

🔍	Search Text
	Extract Text
‖T	Select Text
🖍	Highlight Text
⚹	Cross Out Text
A	Underline Text
A	Squiggly Underline Text
Aₓ	Insert Text
Aₓ	Replace Text

Search Text

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

To open the Text Search dialog: Click on the Text Search button – it's the button with the magnifying glass icon – on the toolbar or choose Edit > Text Search from the menu and the text search dialog will open.

To search for text: Enter the text to search for in the text field, select the appropriate search options, and press the Enter key or click on the New Search button. All occurrences of the string in the document will appear in the occurrences list.
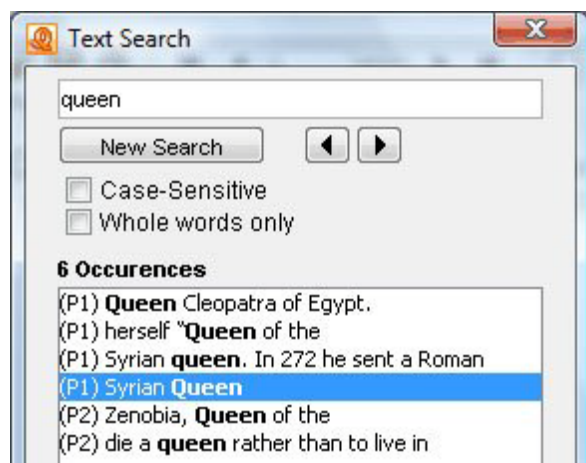
To navigate through the list of occurrences, you can:
- Use the Up arrow key (previous) and Down arrow key (next) on your keyboard.

- Click on the Previous Occurrence or Next Occurrence buttons. These are the two buttons next to the New Search button with the Left and Right arrow icons.
- Or use the F3 (next) and Shift F3 (previous) keys.

Searches can be customized with the following options:

- Case-Sensitive: If checked, the search will be case sensitive. Searching for the string "The" will not return the same results as searching for the string "the".
- Whole words only: If checked, the search will only look for whole words. For instance, when 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.

Extract Text

To extract text from the current document:

- Click on the Document menu on the top toolbar
- Choose the Extract Text option
- The application will open a Save File dialog
- Choose the name of the text file where the text will be extracted to

Select Text

To select text on the page, from the top toolbar, click on the Select text icon then drag the mouse to select the desired text. When right-clicking on the mouse (Mac: Ctrl+Click), a menu will appear giving you the choice to:

- Copy the selected text to the clipboard. Once the text is copied to the clipboard, you can paste it into any text or Word document by simply right-clicking (Mac: Ctrl+Click) on the mouse and choosing the paste option in the mouse menu.
- Highlight the selected text.
- Underline the selected text
- Cross Out the selected text.
- Squiggly underline the selected text.

- Replace the selected text
- Insert text after the selection.

For **rectangular text selection**, hold down Ctrl (Command for OSX) while dragging the mouse. The cursor will change to indicate that a different selection mode is active.
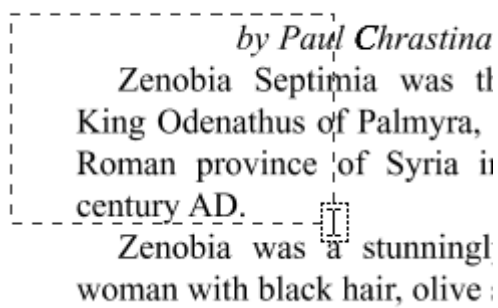
To exit the selection mode, simply click on the mouse icon or Escape on the keyboard.

Highlight | Cross out | Underline | Squiggly Underline

To highlight, cross out, underline, or squiggly underline text in a page, click on the appropriate icon on the annotation toolbar, then drag the mouse to select the desired text.

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.

All text contained in the selected area will be impacted.

Highlight	Cross Out	Underline	Squiggly Underline
teeth, and a fiery nature. hunting lions from horseb was also fond of books and intellectual interests inclu tactics, Greek philosophy, languages. Although she w she claimed to be desc Alexander the Great of Gre Queen Cleopatra of Egypt.	teeth, and a fiery nature. hunting lions from horseb was also fond of books and intellectual interests inclu tactics, Greek philosophy, languages. Although she w she claimed to be desc Alexander the Great of Gre Queen Cleopatra of Egypt.	teeth, and a fiery nature. hunting lions from horseb was also fond of books and intellectual interests inclu tactics, Greek philosophy, languages. Although she w she claimed to be desc Alexander the Great of Gre Queen Cleopatra of Egypt.	teeth, and a fiery nature. hunting lions from horseb was also fond of books and intellectual interests inclu tactics, Greek philosophy, languages. Although she w she claimed to be desc Alexander the Great of Gre Queen Cleopatra of Egypt.

To remove or edit a text highlight, click on the mouse icon , select the highlight by clicking on it, and right click (Mac: Ctrl+Click). The mouse menu will give you the option to open the properties dialog for the highlight or to simply delete it.

Insert Text

To add an insert text annotation, click on the Insert Text icon on the toolbar. The cursor will become a crosshair. Click the crosshair on the desired location for the insert text annotation. One placed, a property dialog will open. Select the color of the annotation and add any comment in the content area then click on the Save button.
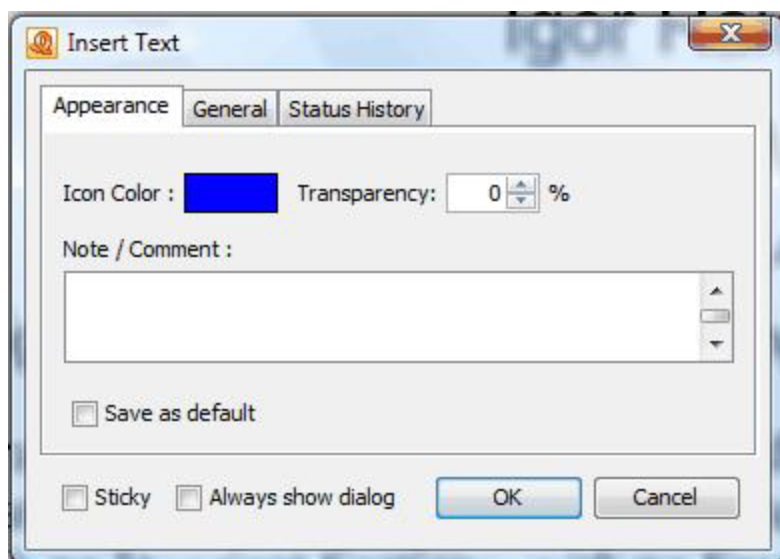
Version 1.1 or any later
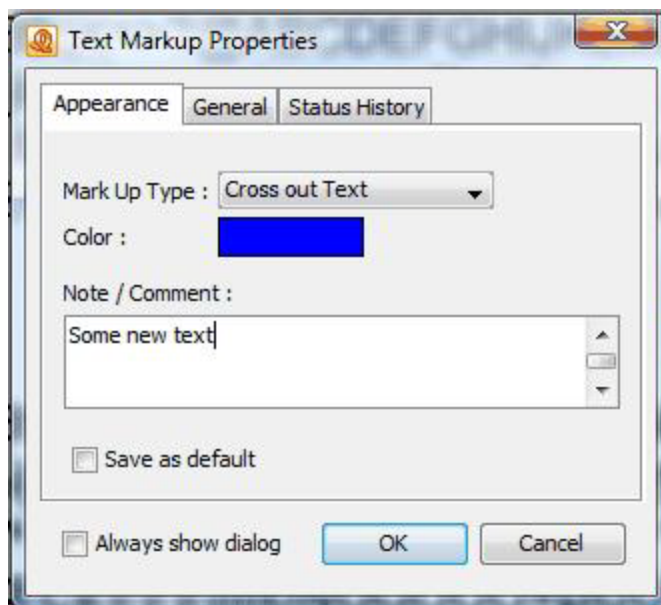Sections, with no Front-
included in the section

To remove or edit an insert text annotation, click on the mouse icon , select the annotation by clicking on it, and right-click (Mac: Ctrl+Click). The mouse menu will give you the option to open the properties dialog for the annotation or to simply delete it.

Replace Text

To add a replace text annotation, click on the Replace Text icon on the annotation toolbar then drag the mouse to select the desired text. Once you release the mouse, a property dialog will open. Select the color of the strikethrough and add any comment in the content area then click on the Save button.

Text Markup Properties

Appearance | General | Status History

Mark Up Type : Cross out Text

Color :

Note / Comment :

Some new text

☐ Save as default

☐ Always show dialog | OK | Cancel

0123456789:;<=>?@ABCΓ
`abcdefghijklmnopqrstuvwϫ
•'''""•——˜™š›œ•žŸ ¡¢£¤¥¦§˙
ÀÁÂÃÄÅÆÇÈÉÊËÌÍÎÏĐÑÒ

To remove or edit a replace text annotation, click on the mouse icon ,
select the annotation by clicking on it, and right-click (Mac: Ctrl+Click). The mouse
menu will give you the option to open the properties dialog for the annotation or to
simply delete it.

Rubber Stamps

Apply a rubber stamp

There are three ways to apply a stamp:

1. From the top toolbar, choose Comments > Add Stamp, choose the appropriate stamp (the pointer changes to resemble the stamp's icon), then click the document where you would like to apply the stamp.

2. From the annotations toolbar, click on the down arrow on the Stamps button, choose the appropriate stamp (the pointer changes to resemble the stamp's icon), then click the document where you would like to apply the stamp.

3. From the annotations toolbar, click on the Stamps button, 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.

Manage stamps

To manage your custom stamps: From the top toolbar, go to Comments > Add Stamp > Manage Stamps to show the Manage Stamps dialog. 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*, *Departmental*, *Draft*, *Experimental*, *Expired*,

Final, For Comment, For Public Release, Not Approved, Not for Public Release, Sold, and *Top Secret*.
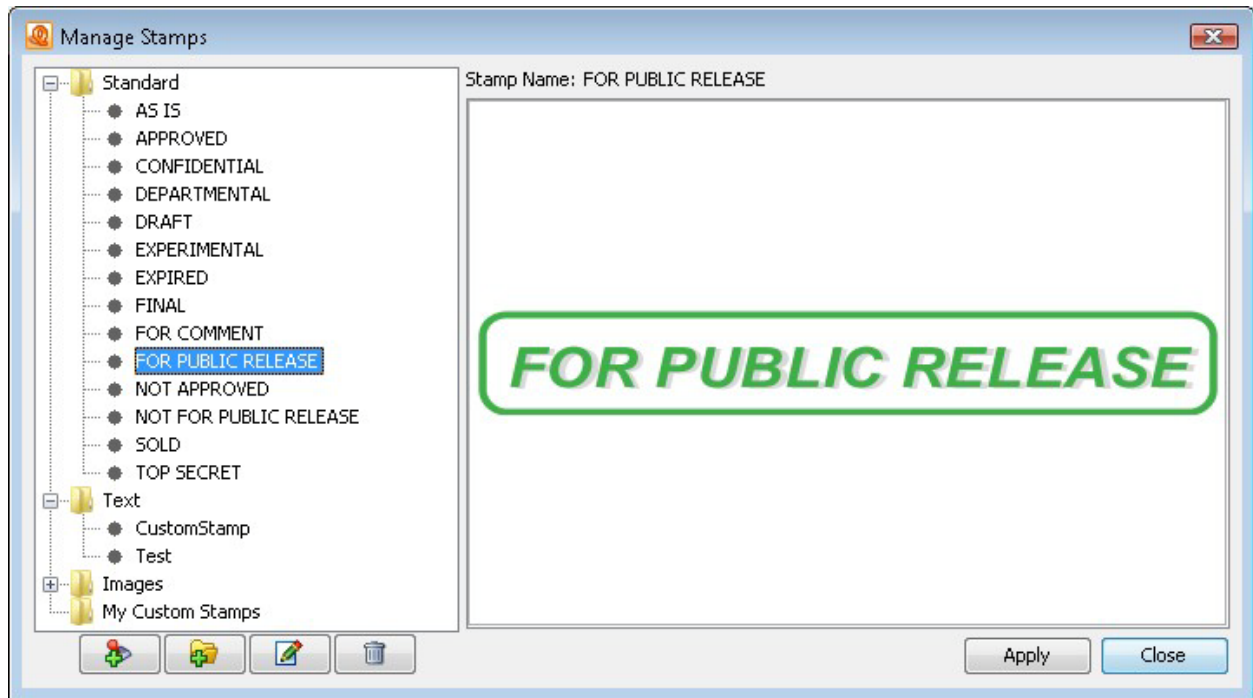
The stamp tree can be modified using the buttons in the stamp toolbar:

- 🐾 Adds a new stamp to the tree.
- 🗀 Adds a new folder to the tree.
- 📝 Brings up the edit dialog for the currently selected stamp.
- 🗑 Deletes the currently selected node.

Create an image stamp

Users can create image stamps from any image (jpg or gif format) accessible from their computer, for instance their own signature stamp.

To create an image stamp:

1. Click on Comments > Add Stamp > Create Image Stamp from the top toolbar to open the Create Image Stamp dialog (see below)
2. Enter the options for the image stamp.
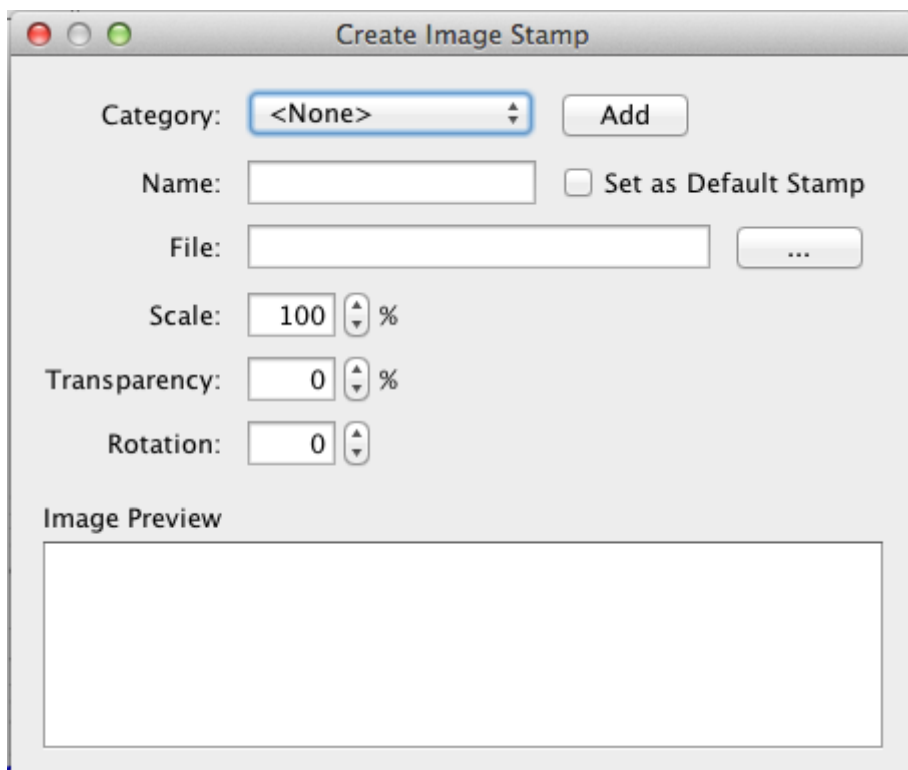
The options for an image stamp are as follows:

- Category – Category to add this stamp to.
- Name – Name of the stamp. The name is used 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.
- Scale – Change the size of the original image to the size you want your stamp to be
- Transparency – Transparency of the stamp
- Rotation - The angle the image should be rotated

**New stamps are saved** as you go, so anytime you close the dialog or the program, all your stamps are automatically saved. Stamps are saved as part of the user settings and can be accessed the next time you launch a new session of PDF Studio.

Create a text stamp

Users can create text stamps with custom text or keywords that are populated when the stamp is applied to a document.

To create a text stamp:

1. Click on Comments > Add Stamp > Create Text Stamp from the top toolbar to open the Create Text Stamp dialog (see below)
2. Enter the options for the new stamp
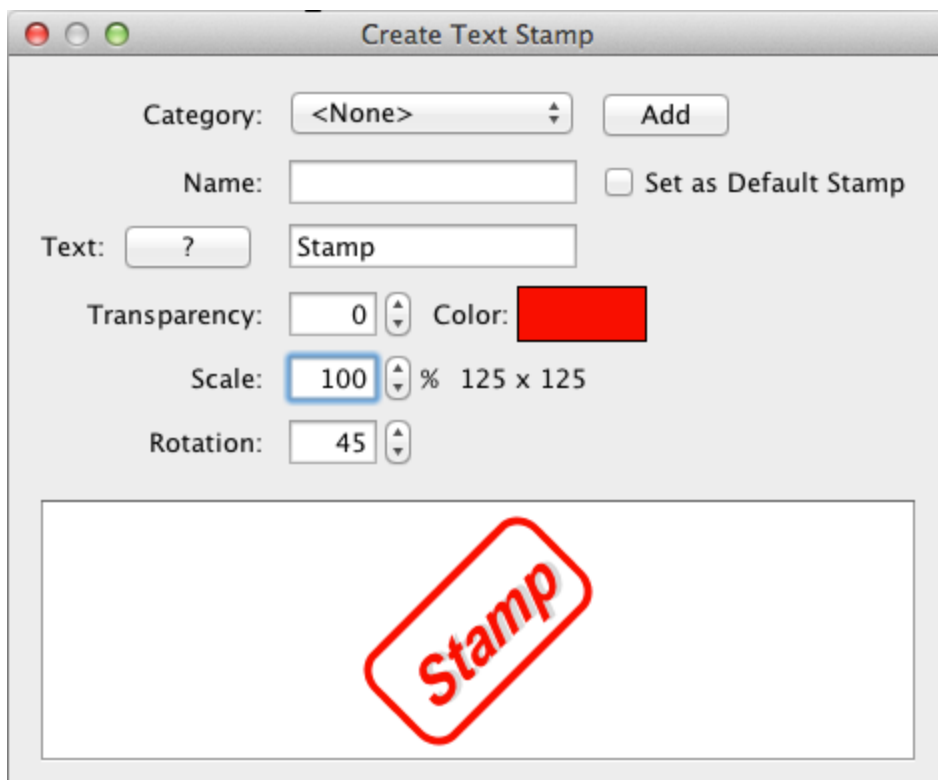
The options for a text stamp are as follows:

- Category – Category to add this stamp to.
- Name – Name of the stamp. The name is used 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.
  There are predefined keywords to allow you to refer to the current page, current date, etc.
  - $page – The page number
  - $author – The user logged in
  - $totalpages – The number of pages in the document
  - $filename – The file name that the document was opened from
  - $filepath – The full file page 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

- o $day – The day of the month
- o $month – The current month, using two digits
- o $year – The current year, using four digits
- o $shortyear – The current year, using two digits
- o $second – The current second
- o $minute – The current minute
- o $hour – The current hour, 1-12
- o $ampm – AM or PM
- o $longhour -The current hour, 0-23
- Color – Color of the stamp.
- Transparency – Transparency of the stamp
- Scale – Change the size of the original image to the size you want your stamp to be
- Rotation - The angle the text should be rotated

New stamps are saved as you go, so anytime you close the dialog or the program, all your stamps are automatically saved. Stamps are saved as part of the user settings and can be accessed the next time you launch a new session of PDF Studio.
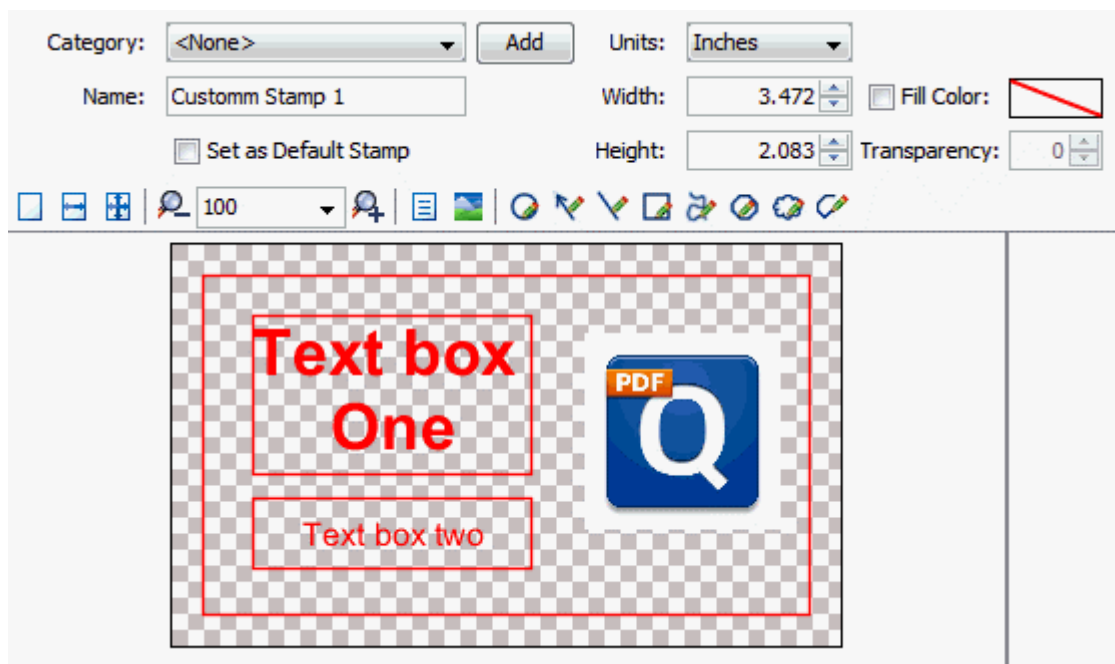
Create a custom stamp

Users can create custom stamps with images, shapes and custom text or keywords that are populated when the stamp is applied to a document.

To create a custom stamp:

1. Click on Comments > Add Stamp > Create Custom Stamp from the top toolbar to open the Create Custom Stamp dialog (see below)
2. Enter the options for the new stamp

The options for an image stamp are as follows:

- Category – Category to add this stamp to.
- Name – Name of the stamp. The name is used in the Stamps menu.
- Units/Width/Height – Enter the size for the custom stamp.
- Fill Color - Choose a color for your custom stamp background.
- Transparency - Enter a transparency value for the stamp's fill color.
- Set as Default Stamp – Check this to set this stamp as the default stamp

New stamps are saved as you go, so anytime you close the dialog or the program, all your stamps are automatically saved. Stamps are saved as part of the user settings and can be accessed the next time you launch a new session of PDF Studio.

Miscellaneous Annotations

File Attachments
PDF Studio allows you to attach files to a PDF document.

Attach a file
Delete an attached file
Open an attached file
Save an attached file on your computer

Attach a file

To attach a file to a document, click on the small down-arrow on the Media toolbar. A menu will be displayed, giving you the choice to attach the file simply as an embedded file or as a comment. If the file is attached as an annotation, the cursor will become a cross cursor and you can choose a location on the page where the file should be attached.

You can also simply drag and drop files onto the attachments tab to attach them as an embedded file.


Note that the option chosen in the menu is remembered throughout the session. When you click the attach icon (and not the down-arrow) in the session, PDF Studio will attach files according to your choice as an embedded file or as a comment.

Delete an attached file

To remove an attached file:

- 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.
- 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.

84
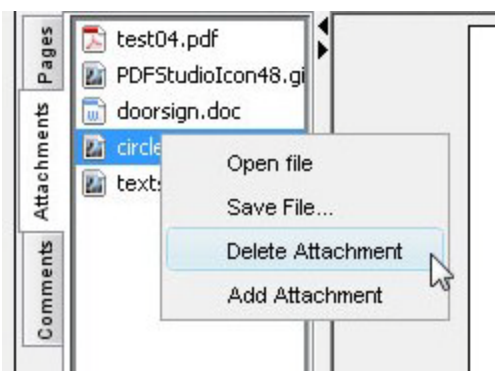
Open an attached file

To open an attached file:

- 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
- If the file is simply 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.

Note that 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.

Save the attached file to your computer

To save an attached file to a local drive on your computer:

- If the file is attached as a comment, right-click (Mac: Ctrl+Click) on the file attachment comment on the page and choose Save File.
- 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.
- A file dialog will open. Choose the location and name of the file you wish to save.

Links

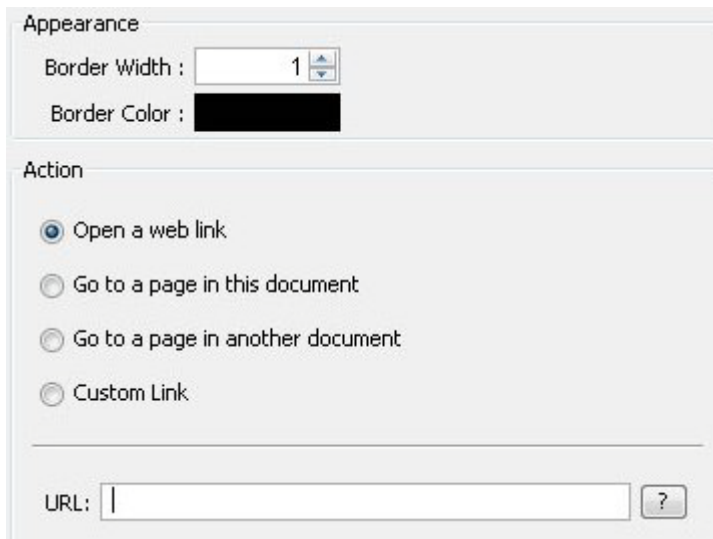Links may be automatically generated and removed.

[Create a link](#)
[Auto create links](#)
[Auto remove links](#)

Create a link

Add a hyperlink to a page by following the standard instructions to [create an annotation](#). 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. After the link annotation is added, the Link Properties dialog is displayed.
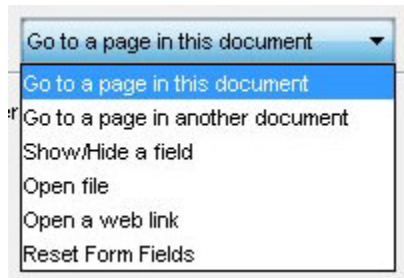

Link Properties:
- Border Width
- Border Color
- Action
    - Open a web link. Some examples of valid links:
        - http://www.qoppa.com
        - ftp://ftp.site.com
        - file:c:\qoppa\temp.txt
        - mailto:johndoe@gmail.com
- Go to a page in this document.
- Go to a page in another document.

- Custom link. Allows you to add multiple actions from a list of available actions:

Auto create links

To automatically generate links for a document's content, select Comments->Links->Auto create links. When the "find" button is pressed, the document will be searched for text content that appears to be either a web link or an email link, depending on which "search for" options are selected. The link to be created is displayed in the "Link" column of the table. This value may be edited. When the "Make" button is pressed, the selected links are created.
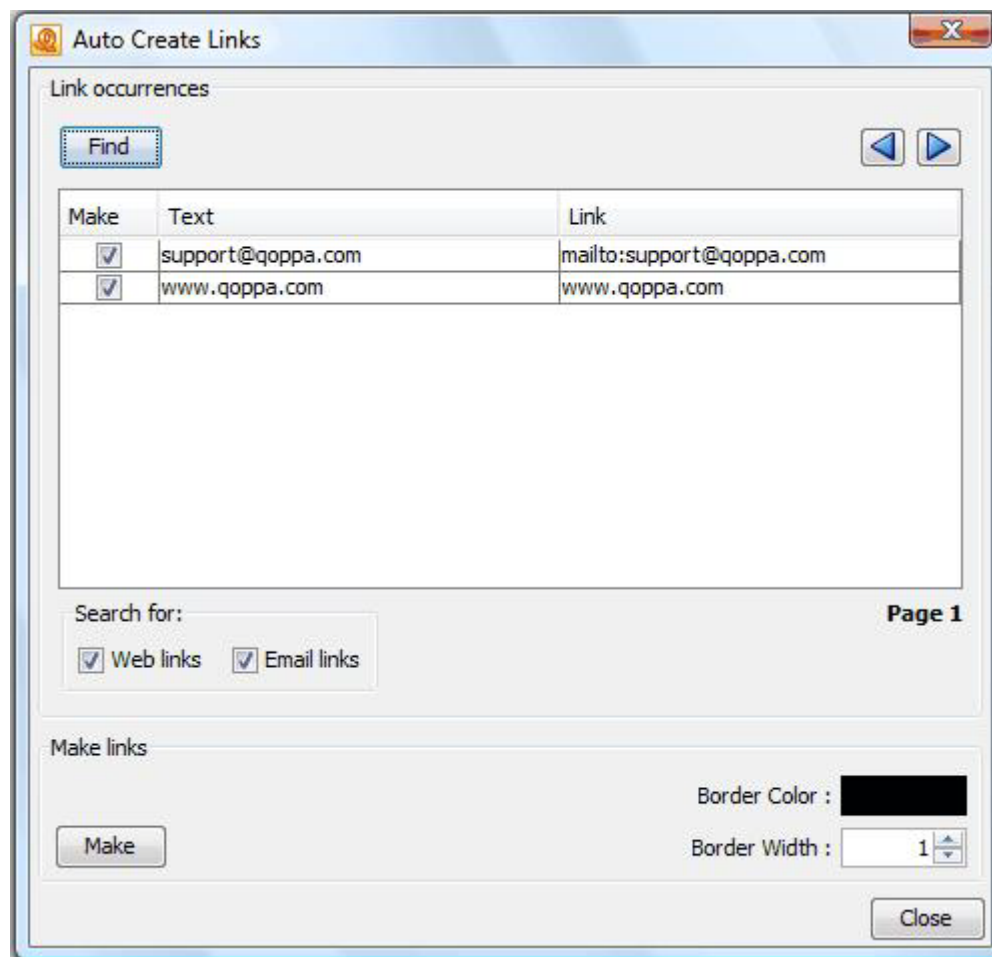
Auto remove links

To automatically remove all links from a document, select Comments->Links->Auto remove links. Once the removal is confirmed, all links will be deleted.

Tool Chest

PDF Studio can store frequently used comments and annotations in a tool chest. To show the tool chest, **select View > Tool Chest**. To add an annotation from the tool chest to a document, click the annotation in the tool chest, and then click the location on the document to place the annotation.
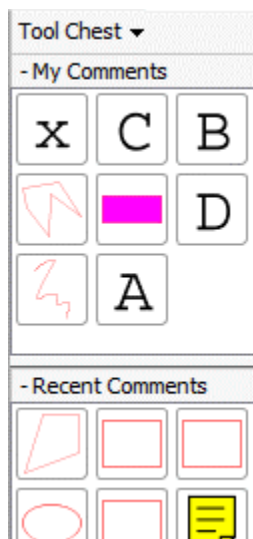
Items in My Comments and Recent comments can be reordered, deleted, or resized.

- 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 Delete.
- To resize, select the arrow next to Tool Chest and choose Small, Medium (default), or Large.

My Comments
Recent Comments

My Comments

Users can maintain their preferred list of comments and annotations in the **My Comments** section of the tool chest. To add an annotation to My Comments, select the annotation in the document by clicking on it, right-click (Mac: ctrl+click) to show the context menu and select **Add to My Comments** from the menu.

Recent Comments

The list of recently used annotations are maintained in the Recent Comments section of the tool chest. 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. To permanently keep an item from the Recent Comments list, right-click (Mac: ctrl+click) the annotation in the Recent Comments tool chest and select **Add to My Comments** from the context menu.
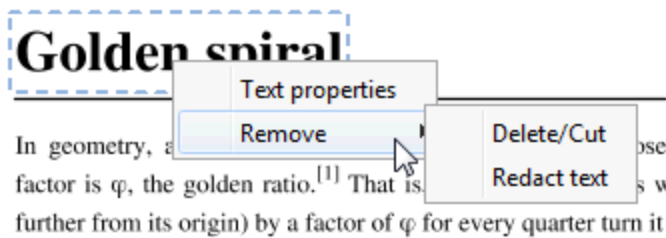
Editing and Managing PDFs

Content editing is a powerful tool to change the characteristics of text or objects in a PDF document. You can also redact or delete text and images in your PDFs.

Activate the tool by clicking on the Edit Content button , then select the object(s) that you want to modify.
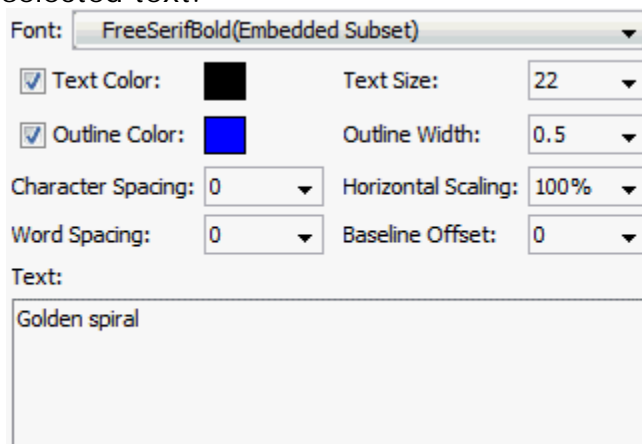
Edit Text

Right click on text to edit its properties or remove it.

Text Properties

From the Properties window, you can edit the font, color, text, and spacing of the selected text.

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.
If you have multiple object types selected, the type that you right click on will drive what options you have available to you. For example, right clicking on the text object will give you the text menu, right clicking on the path object will give you the path menu.

The options for text properties are as follows:

- Font – choose a new font for the selected text from the list
- Text Color – change the color of the text
- Text Size – edit the font size
- Outline Color – add or adjust the outline of the text
- Outline Width – increase or decrease the width of the outline
- Character Spacing – increase the space between each letter
- Word Spacing – increase the space between each word
- Horizontal Scaling – increase or decrease the spacing between each letter
- Baseline Offset – move line of text above or below the surrounding text; create super- or sub-scripts
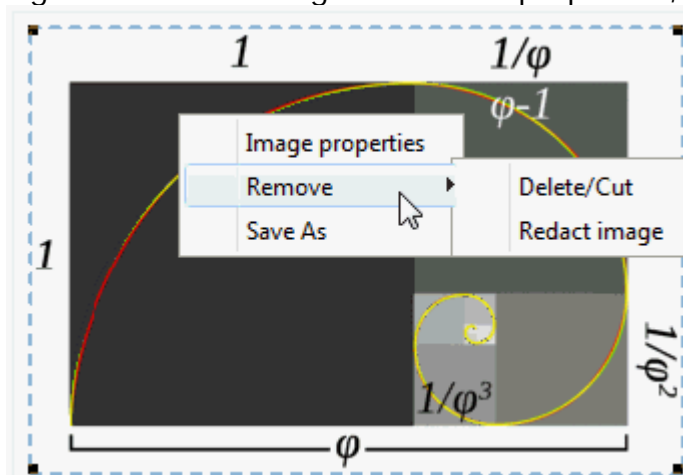- Text – change the wording of the text

Removing Text

There are two options for removing text: delete/cut and redact.
Delete/cut will remove the text from the document and add it you your clipboard; pasting (ctrl-v) will add the text back to its original position. Redact will replace it with a black bar.
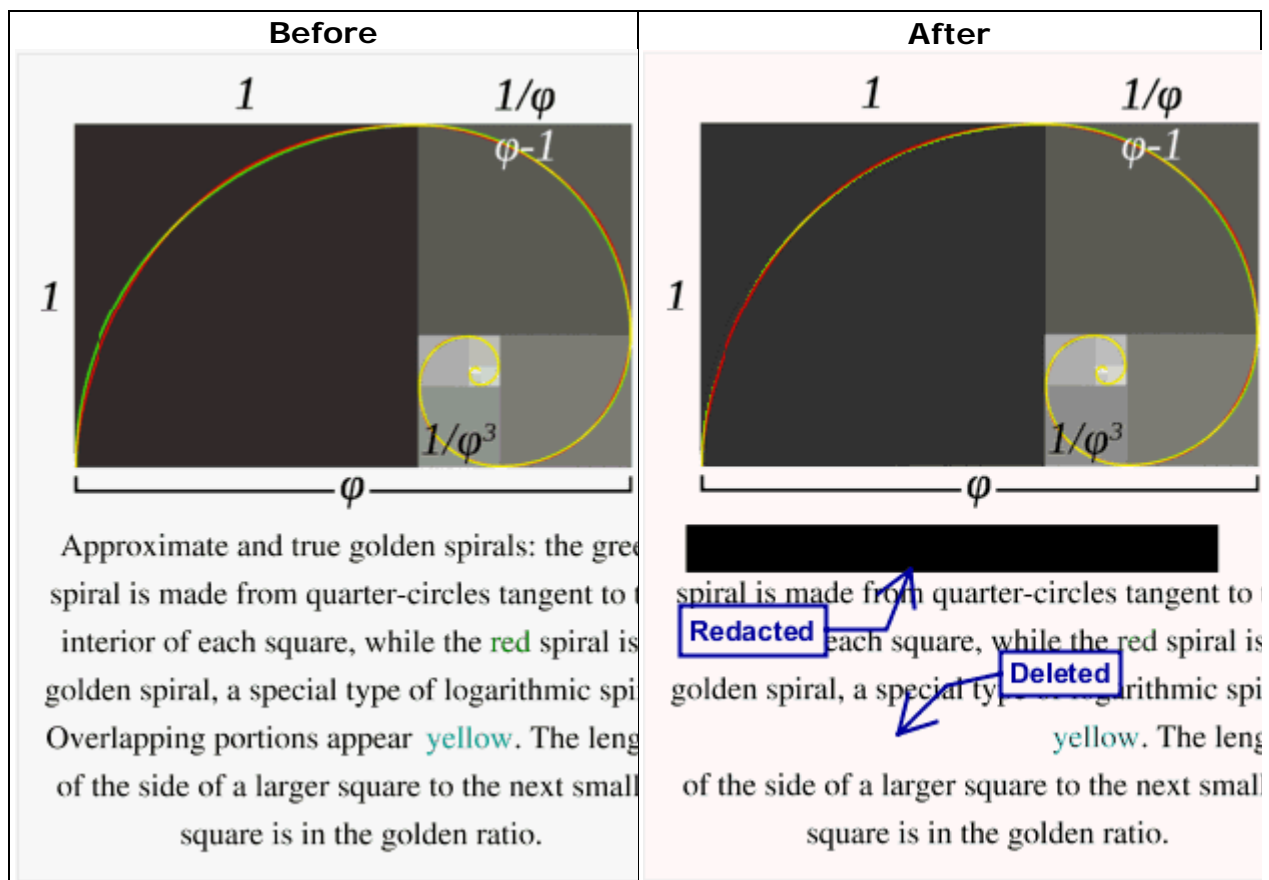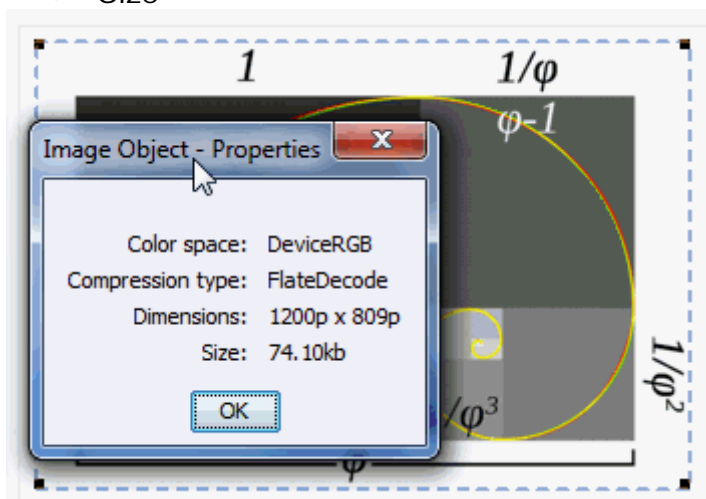
Edit Images

Right click on an image to view its properties, save it, or remove it.

Image Properties

Image properties will report the following items:

- Color space
- Compression type
- Dimensions
- Size

Saving Images

Selecting Save As will open up your system file dialog and allow you to choose a location for to save the image to.

Removing Images

As with text, you have two options for removing images: delete/cut and redact. Delete/cut will remove the image from the document and add it you your clipboard; pasting (ctrl-v) will add the image back to its original position. Redact will replace it with a black rectangle.

Edit Paths

Right click on a path object to edit its colors or to remove it.

Delete/cut will remove the object from the document and add it you your clipboard; pasting (ctrl-v) will add the object back to its original position.
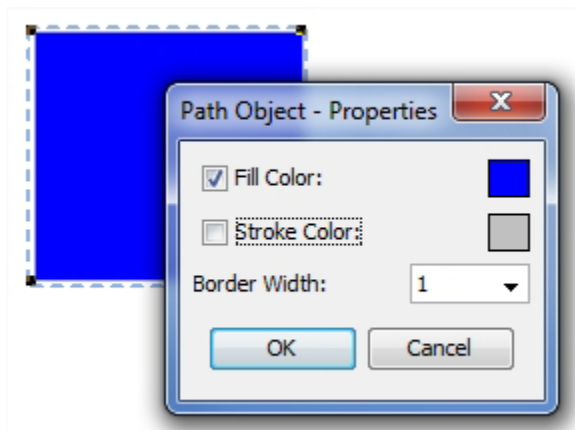
Batch Processing

Batch processing ![Pro] is a simple, fast way to modify multiple documents. A batch process is configured by choosing the documents to be modified, setting any necessary passwords, and configuring the job specific options:

Apply Headers and Footers to a Batch
Apply Watermarks to a Batch
Convert a Batch
Crop a Batch
Extract Images from a Batch
Extract Text from a Batch
Merge a Batch
Preflight a Batch
Print a Batch
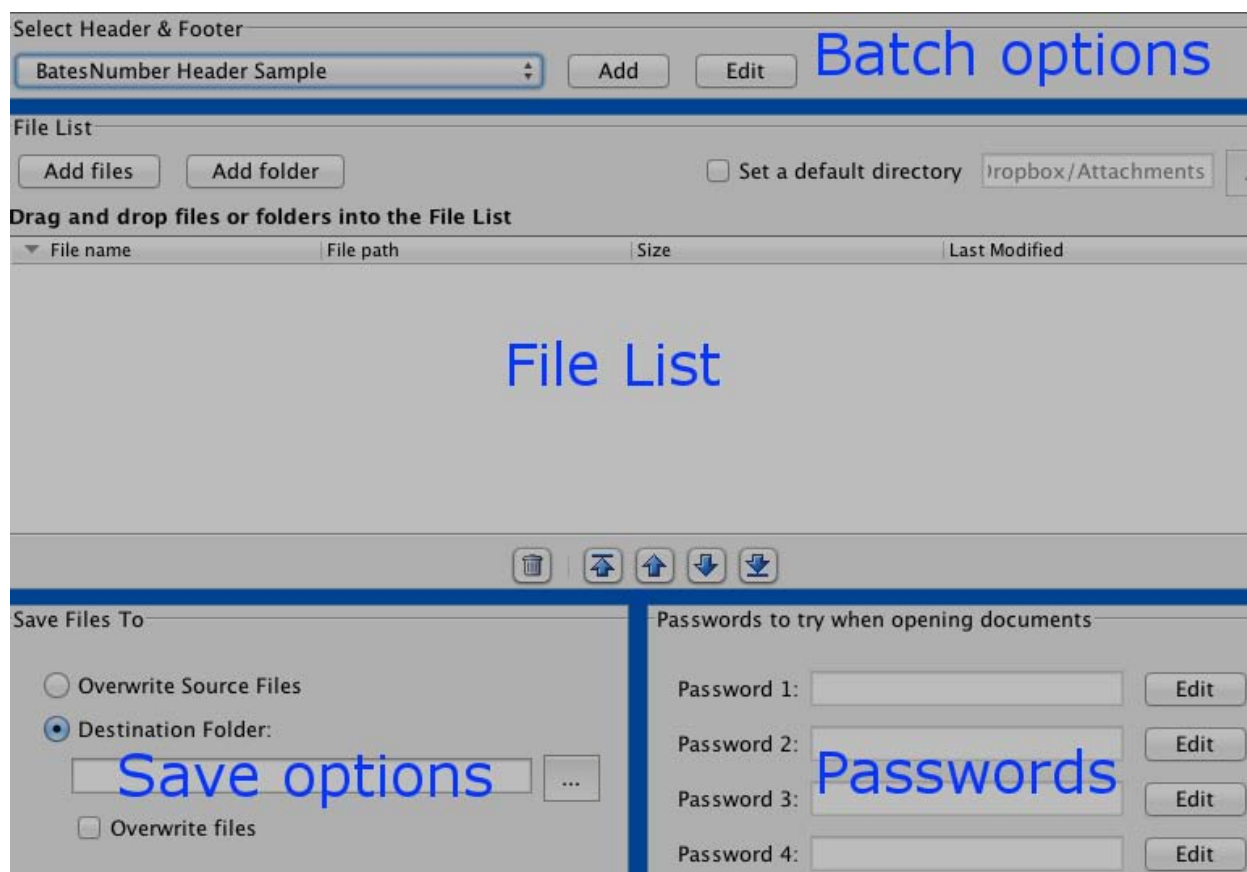Set Initial View for a Batch
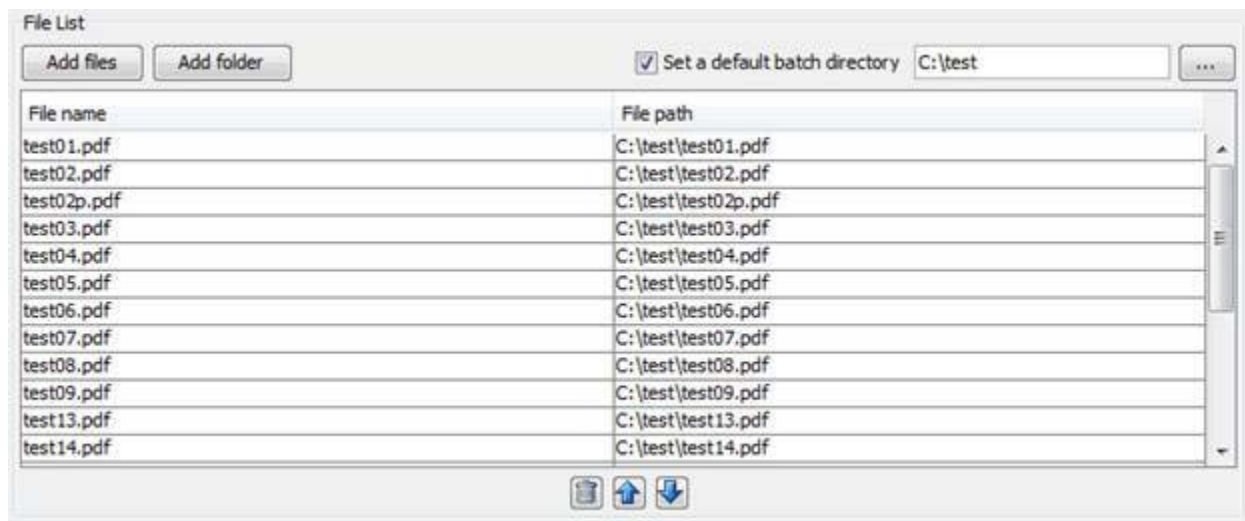Set Security on a Batch
Split a Batch

Each Batch dialog has the same parts:

Batch-specific options (if applicable), file list, save options, and passwords

Choose Batch Files

Files may be added, removed, and re-ordered using the file chooser table:

Add files	Produces a file chooser to add individual files to the list.
Add folder	Produces 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.
☑ Set a 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.

Set Open Passwords, Configure Output

Set open passwords — Some files may require a password to be opened. Enter up to four passwords for the batch process to use to attempt to open any password protected files.

Configure output — In the "Save to Files" section, select either "Overwrite Source Files" or "Destination Folder." If the "Overwrite Source Files" is selected, output files will be saved over the corresponding source files. If "Destination Folder" is selected, output files will be saved to the directory listed. If files are saved to a new folder, checking "Overwrite Files" will save over any files in that folder with the same name. If this option is not checked, a number will be appended to the output file name, to avoid duplicate file names.
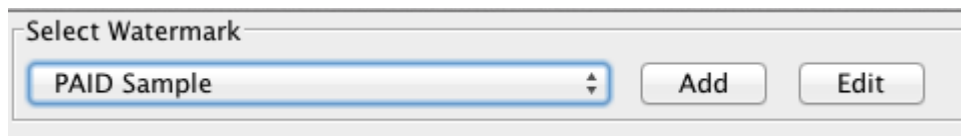
Apply Headers and Footers to a Batch

Add a header or footer to a batch of documents. The processed documents are either saved to a new folder or saved over the previous files.
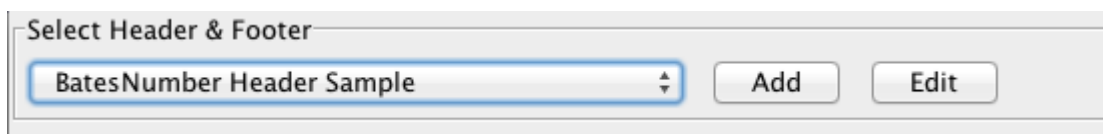
Apply Watermark to a Batch

Add a watermark to a batch of documents. The processed documents are either saved to a new folder or saved over the previous files.

Convert a Batch

Convert all supported non-PDF files into PDF.

Crop a Batch

Adjust the crop margins of a batch of documents. The processed documents are either saved to a new folder or saved over the previous files.
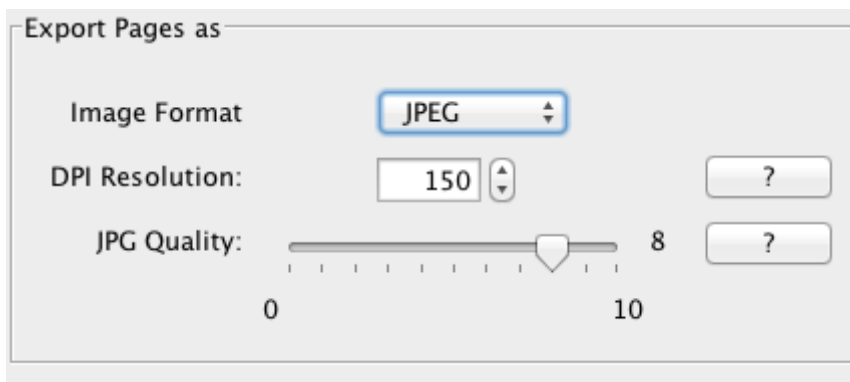
Extract Images for Batch

Extract a batch of documents as images. Each page of each document will be saved as an image file.

- 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.
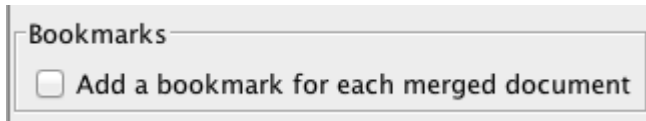
Extract Text from a Batch

Extract text from multiple PDF documents. Each document will output a text file with the text contents of that document.

Merge a Batch

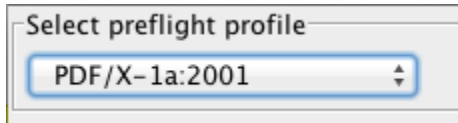Merge multiple documents. It will convert all supported non-PDF files into PDF.

Bookmarks
☐ Add a bookmark for each merged document

Preflight a Batch

Preflight a batch of documents. After the process completes, the results of the preflight check are displayed in a dialog.

Select preflight profile
PDF/X−1a:2001

Select a preflight compliance standard:

- PDF/X-1A:2001
- PDF/X-1A:2003
- PDF/X-3:2002
- PDF/X-2:2003

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.

Print a Batch

Print multiple PDF documents.

Set Initial View for a Batch

Modify the initial display properties of multiple PDF documents.

- **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.

Set Security on a Batch

Modify the security settings (using the same passwords and permissions) of multiple PDF documents.

- o **Passwords** – set passwords to protect the documents:
  - Password to Open Document – also known as the user password, it is the password that will be required when the documents are opened.
  - Password to Change Permissions – also known as the permissions password or owner password, it is the password that will be required when trying to change permissions and passwords on the documents.
- o **Permissions** – set specific permissions for the documents:
  - **Allow Printing High Definition** – automatically grants the "Allow Printing" permission.
  - **Allow Printing**

- **Allow Text & Graphics Extraction** – automatically grants the "Allow Extraction for Accessibility" permission.
- **Allow Extraction for Accessibility** – in support of accessibility to disabled or other purposes.
- **Allow Change Document** – automatically grants Allow Document Assembly, Allow Annotations & Comments, and Allow Form Filling & Signing
- **Allow Document Assembly** – inserting, rotating, or deleting pages; creating bookmarks or thumbnail images.
- **Allow Annotations & Comments** – automatically grants Allow Form Filling & Signing.
  - If Allow Change Document permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.
- **Allow Form Filling & Signing**

Split a Batch

Split multiple PDF documents.
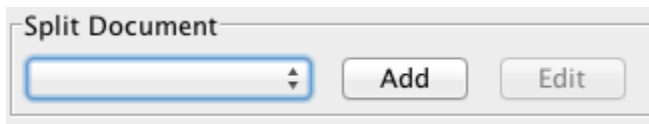
Select a split configuration from the "split document" drop down box. Or add a new split configuration with the "new" button.

Bookmarks & Outlines

Typically a bookmark will only have one action associated with it and will be a goto page action. By default, created bookmarks will be goto page actions 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.

However, in the PDF format definition, bookmarks can have many different actions associated with them: go to a page in another document, show or hide a form field, open a file, or open a web link. If a bookmark has multiple actions associated with it, actions will be executed in the order they were added to the bookmark.

Add a bookmark
Remove a bookmark
Move bookmarks
Bookmark from selected text
Rename a bookmark
Set destination
Edit properties of a bookmark
Automatically create bookmarks

Add a Bookmark

Bookmarks may be added as parents or as children to existing bookmarks. In both cases, the new bookmark is added as a goto action for the current page view. The actions for the bookmark can be modified after creation: Editing actions of a bookmark.

To add a bookmark as a root, choose Document > Create Bookmark, use the keyboard shortcut Ctrl+b), or click the new bookmark button at the top of the bookmark panel. 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. 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.
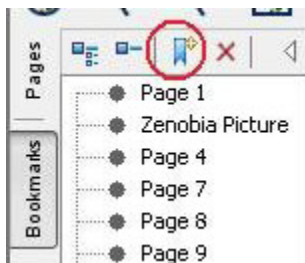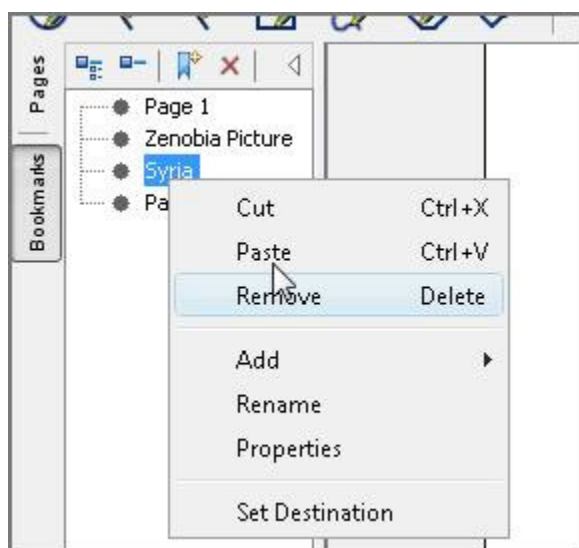

To add a bookmark as a child, right-click on a bookmark and select add child:

Remove a Bookmark

To remove bookmarks, either select the bookmark and press delete on your keyboard or right-click (Mac: ctrl+ Left click) on the bookmark in the bookmark tree and choose the remove option in the mouse menu.

Move Bookmarks

Drag and Drop can be used to move and reorganize bookmarks. 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 20.	This bookmark will become a child of Page 18.
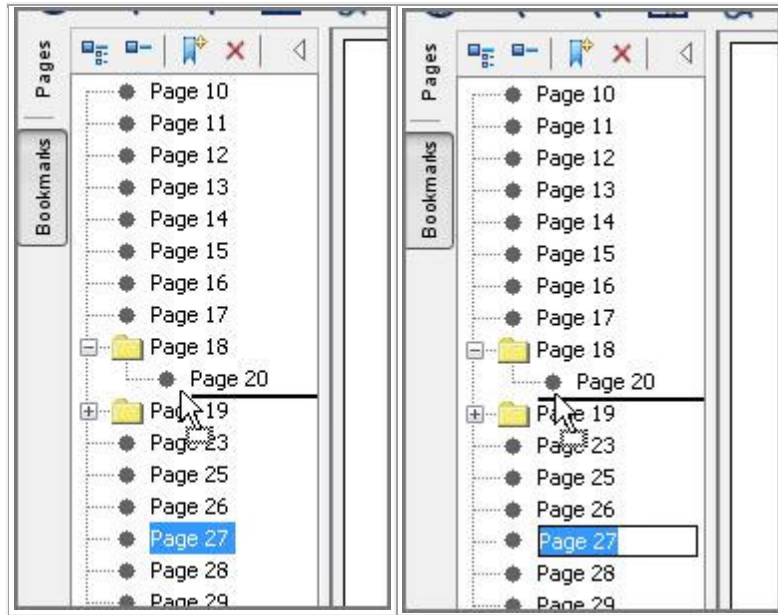
Cut and Paste can also be used to reorganize bookmarks. You can cut a bookmark from the tree by right-clicking (Mac: Ctrl+Click) on it and selecting cut or by using the keyboard shortcut, Ctrl+x. Then paste the bookmark onto its new parent by right-clicking on an existent bookmark and selecting Paste or by using the keyboard shortcut, Ctrl+v.

Bookmark from 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.
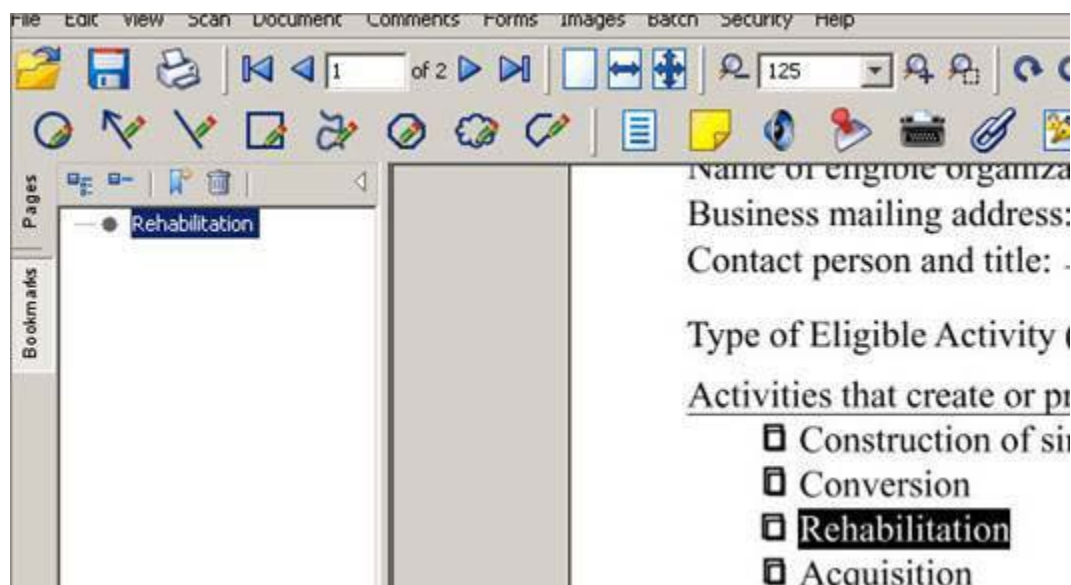
Rename a Bookmark

To rename a bookmark, double-click on the bookmark in the bookmark tree or right-click (Mac: Ctrl+Click) and select Rename. The bookmark label will become editable. You can enter the new name for the bookmark.

Set Destination

To set the destination of a bookmark to the current location, right-click (Mac: Ctrl+Click) on a bookmark in the tree and select Set Destination. This will remove any actions currently associated with the bookmark and replace them with a goto page action for the current page view.
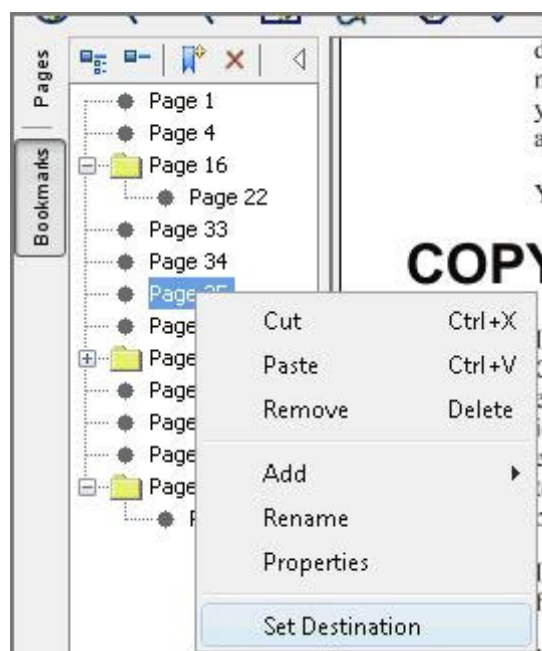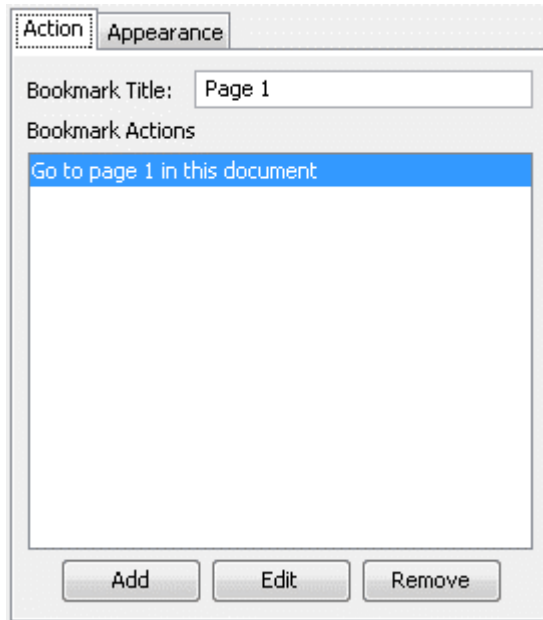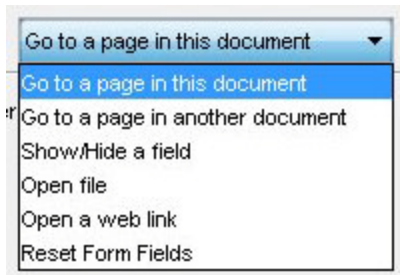

Edit Properties of a Bookmark

To edit actions of a bookmark, right-click (Mac: Ctrl+Click) on the bookmark in the bookmark tree. Choose the Properties option in the bookmark menu. Select the Action Tab in the dialog. The Bookmark Properties dialog will be displayed:

Selecting Add or Edit will show the action dialog:

To edit appearance of a bookmark, right-click (Mac: Ctrl+Click) on the bookmark in the bookmark tree. Choose the Properties option in the bookmark menu. Select the Appearance Tab in the dialog. The Bookmark Properties dialog will be displayed:

This can be used to give the bookmark color and text style.

Automatically Create Bookmarks

To automatically create bookmarks for a range of pages, select Document > Auto Create Bookmarks. This will display the Auto Create Bookmarks dialog.
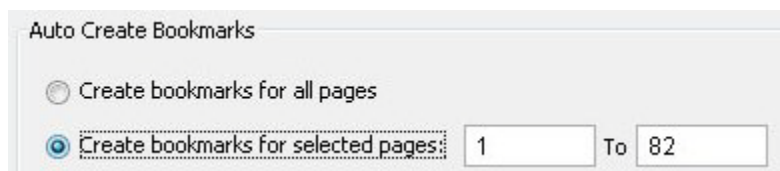
Select the range of pages you wish to automatically create bookmarks on and click the start button. This will add goto action bookmarks for each page in the given range.

Document Security

PDF Studio allows the user to set or change passwords and permissions on PDF documents. 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 users from modifying the document's permissions. The document's permissions can be configured to restrict the ways a document may be modified and accessed.

Secured documents will have (SECURED) after the file name in the title bar of PDF Studio.
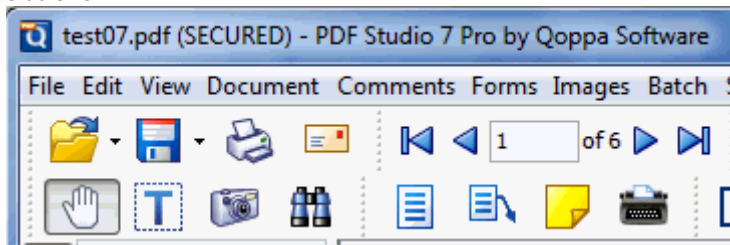
View Security Settings – View passwords and permissions for the current PDF document
Change Security Settings – Update passwords and permissions for the current PDF
Set Security on a Batch – Apply the same security settings to multiple files in a single action

View Current Security Settings

To view current security settings, click on Document > Security from the top toolbar. The application will open the Document Security Settings dialog, where you can view current security settings for the document.

- Passwords
    - **Password to Open Document** – This is also known as the user password. It is the password that is required to open the document.
    - **Password to Change Permissions** – This is also known as the permissions password or owner password. It is the password that is required when trying to change permissions and passwords on the document.
- Permissions – Specific permissions for the document:
    - **Printing High Definition** – Permission to print the document at high resolution. When this permission is granted, the following permission Printing is automatically granted.
    - **Printing** – Permission to print the document.
    - **Text & Graphics Extraction** – Permission to copy or extract text and graphics from this document. When this permission is granted, the following permission Extraction for Accessibility is automatically granted.
    - **Extraction for Accessibility** – Permission to extract text or graphics from this document in support of accessibility to the disabled or other purposes.
    - **Change document** – Permission to make changes to this document, for instance by creating form fields.

- 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 be granted independently.
  - **Document Assembly** – Permission to assemble the document: insert, rotate, or delete pages and create bookmarks or thumbnail images.
  - **Annotations & Comments** – Permission to Add or Modify text annotations.
    - If granted, Form Filling and Signing, is also automatically granted.
    - If not granted, Form Filling and Signing can be granted independently.
    - If granted and the Change Document permission is also granted, creating or modifying interactive form fields (including signature fields) is allowed.
  - **Form Filling & Signing** – Fill in existing interactive form fields including signature fields.

Change Current Security Settings

To change current security settings:
1. Click on Document > Security from the top toolbar.
2. The application will open the Document Security Settings dialog, where you can view current security settings for the document.
3. Click on the Edit button
4. The Change Document Security dialog will open
5. Choose the desired options in the dialog (see options below)
6. Save the document to save the new security settings

Set Security on a Batch

To set security on a PDF document that is not opened in PDF Studio or to set security on multiple PDF documents in a single action, use the Set Security to a Batch function. See our documentation of Setting Security on a Batch in the Batch Process documentation page.

Digital Signatures

Digital Signatures **Pro** 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. A valid signature has a digital ID issued by a trusted certificate authority. In order to sign documents, a digital ID may be imported or PDF Studio can create a self-signed digital ID.

Create a Signature Field **Pro**
Modify a Signature Field **Pro**
Apply a Signature **Pro**
Customize Signature Appearance **Pro**
Validate Digital Signatures
Manage Trusted Certificates **Pro**
Manage Digital IDs **Pro**

Create a Digital Signature Field

PDF Studio can create new, unsigned digital signature fields in a document. To do so, select Add Signature Field from the Security menu.

When the tool is started, the cursor will become a crosshair and will allow the user to mark the location for the new field on the document.
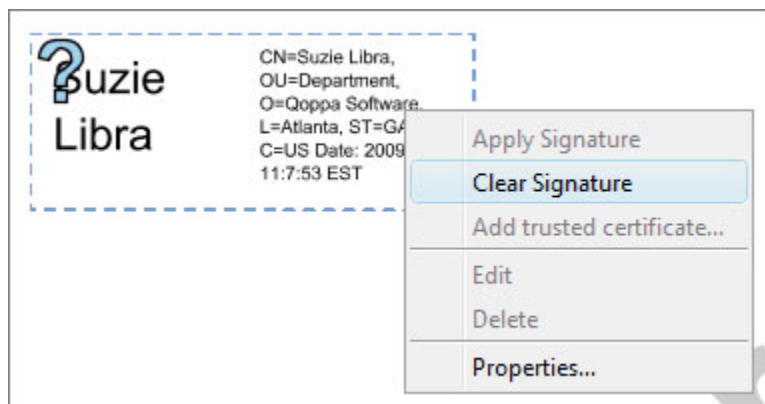

After the field is created, it can be clicked on to apply a digital signature.

Modify a Digital Signature Field

To modify a digital signature field, right-click on the signature field (Mac: Ctrl-Click). A mouse context menu will appear.
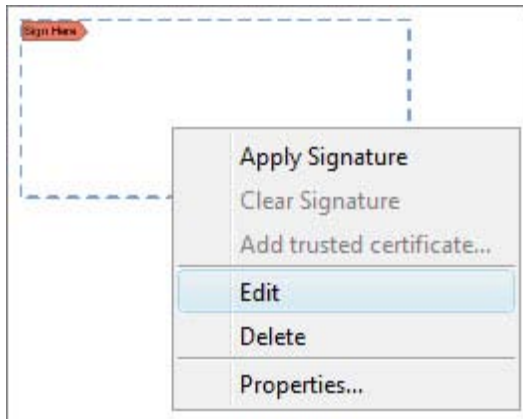
If the field is signed, the only enabled menu options are Properties and Clear Signature. The Properties option will display additional details about the signature:
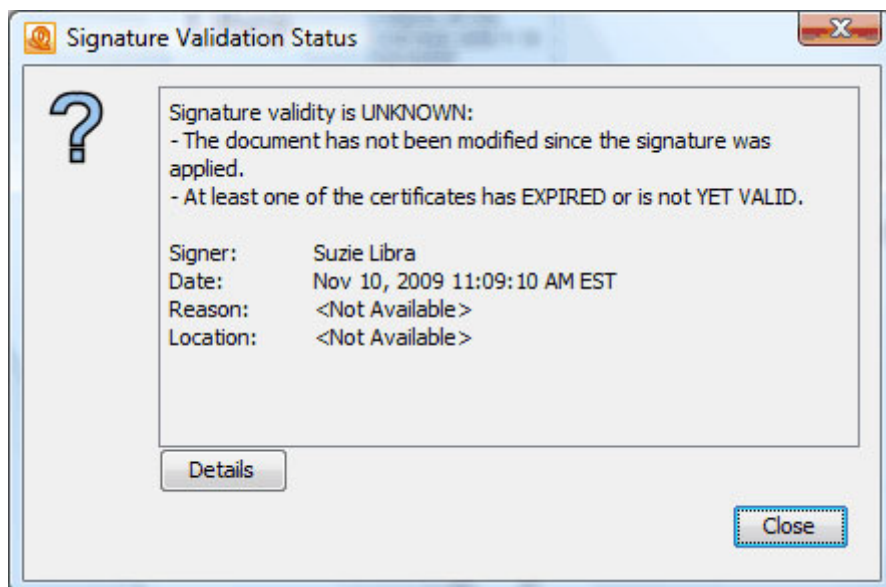
The Clear Signature option will remove the signature from the signature field. In the context menu for an unsigned field, the other menu items will be enabled.

The Edit option will allow the empty field to be modified (moved or resized). The Delete option will remove the field. The Apply Signature option will apply a digital signature.

Apply a Digital Signature

Digital signatures may be applied to documents using digital IDs contained within PKCS#12 files. To apply a signature, click on a signature field or select Sign Document from the Security menu. If PDF Studio has one or more digital IDs stored, the user will be prompted to pick from the existing IDs. Otherwise, the user will be prompted to either create or import an ID.

Create or import a digital ID

If there are no digital IDs saved in PDF Studio, the user will be prompted to either create a new ID or import an existing one.
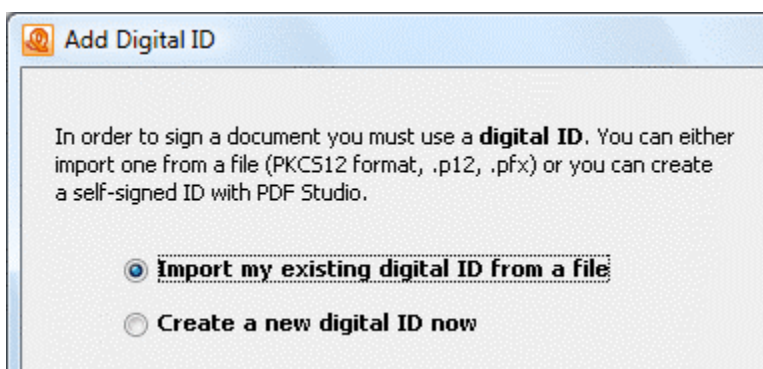
Import digital ID from file

This option allows the user to import digital IDs in .pfx or .p12 format. Browse for the digital ID file and enter the password to add this digital ID to PDF Studio. You will be required to enter the password whenever you use the digital ID.
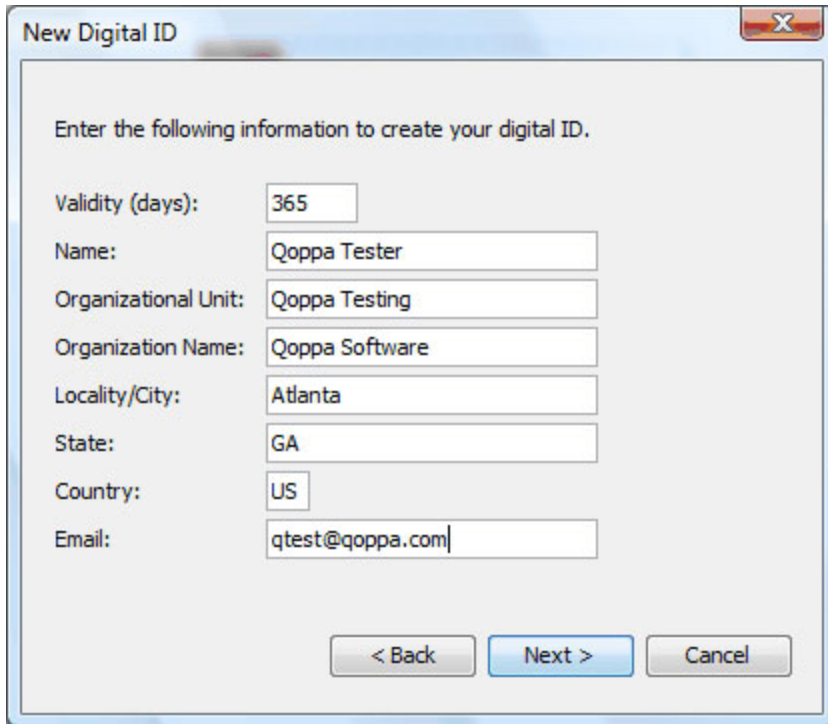

Digital ID files may be protected with a complex password that is difficult to remember. The **Use my password** option will allow you to create your own password. PDF Studio will prompt you for your password instead of the file's password when you sign documents. The digital ID file will not be modified, but the file's password will be securely stored and can only be retrieved with your password.

Create new digital ID

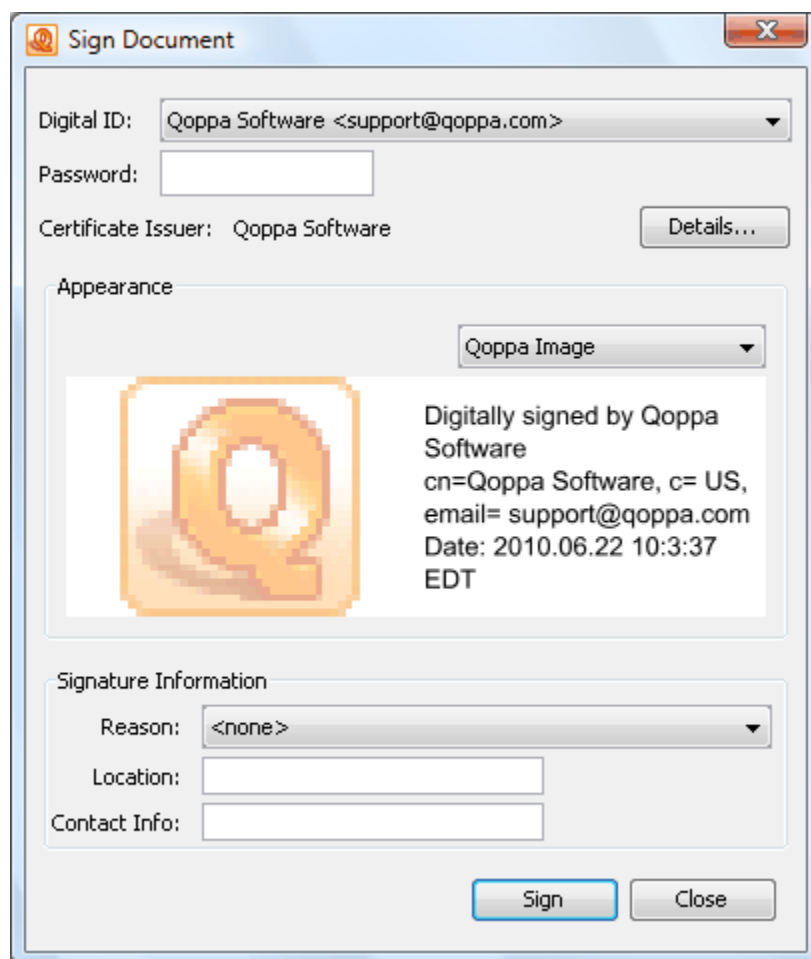This option allows the user to create a self-signed digital ID.

The newly created ID will be added to PDF Studio's list of IDs and can be applied to the document.

Select a Digital ID

If there are digital IDs saved in PDF Studio, the user will be prompted to select from these existing IDs. A new digital ID can be added with the **New Digital ID...** option in the list.

Pressing the Sign button will apply the selected signature.

Customize Signature Appearance

To modify the signature appearance that is created when the document is signed, select **Create New Appearance…** from the Appearance list. There are many options to customize the text that will display in the signature field. The certificate contains the information used to fill these fields. Additionally, an image can be used for the signature appearance.
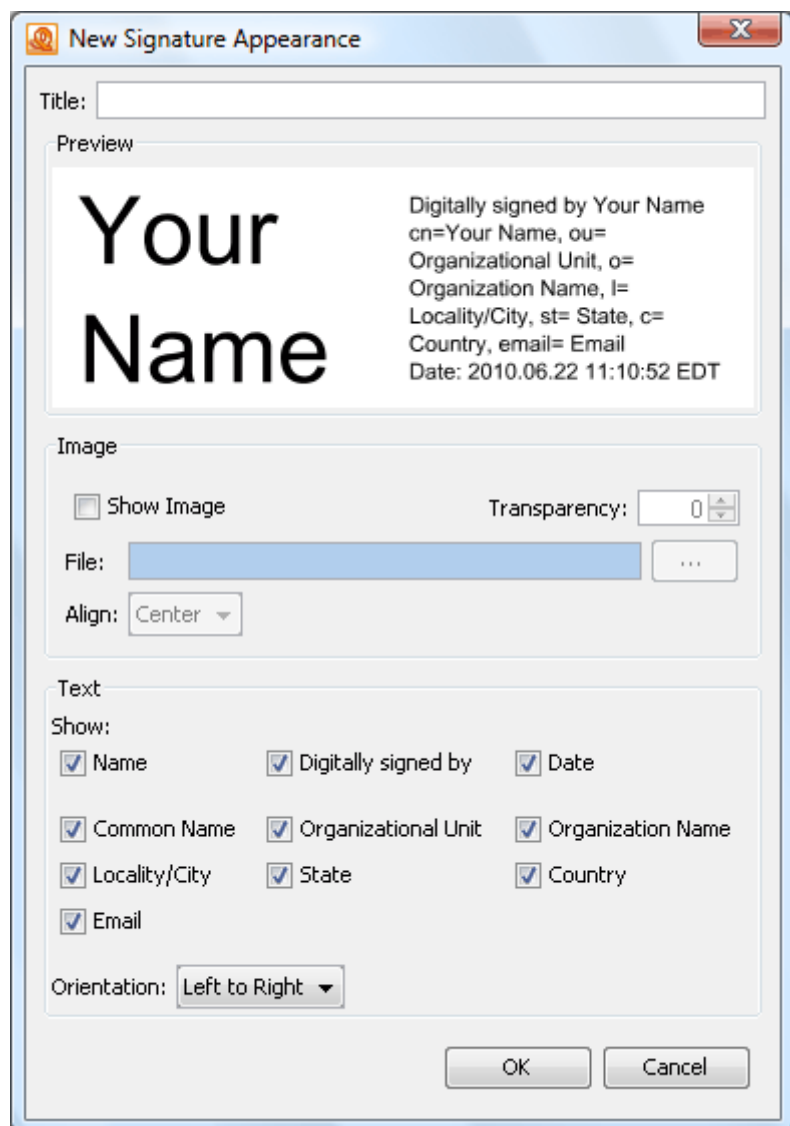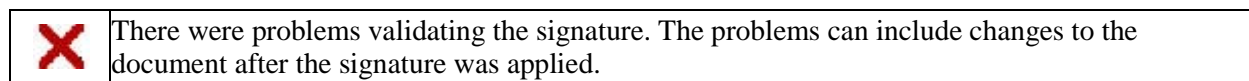
Validate Digital Signatures

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.

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 changes to the document after the signature was applied.

Manage Trusted Certificates

When PDF Studio validates digital IDs, it checks that the digital ID was issued by a trusted certificate authority. The user can manage which certificate authorities to trust. When a digital ID is created or imported, its issuing authority is automatically added to the list of trusted certificates. Open the Trusted Certificates dialog by selecting Security > Security Settings > Trusted Certificates from the top toolbar.
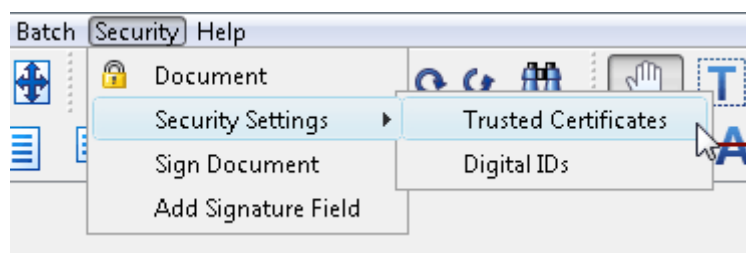

This will open the Trusted Certificates dialog.
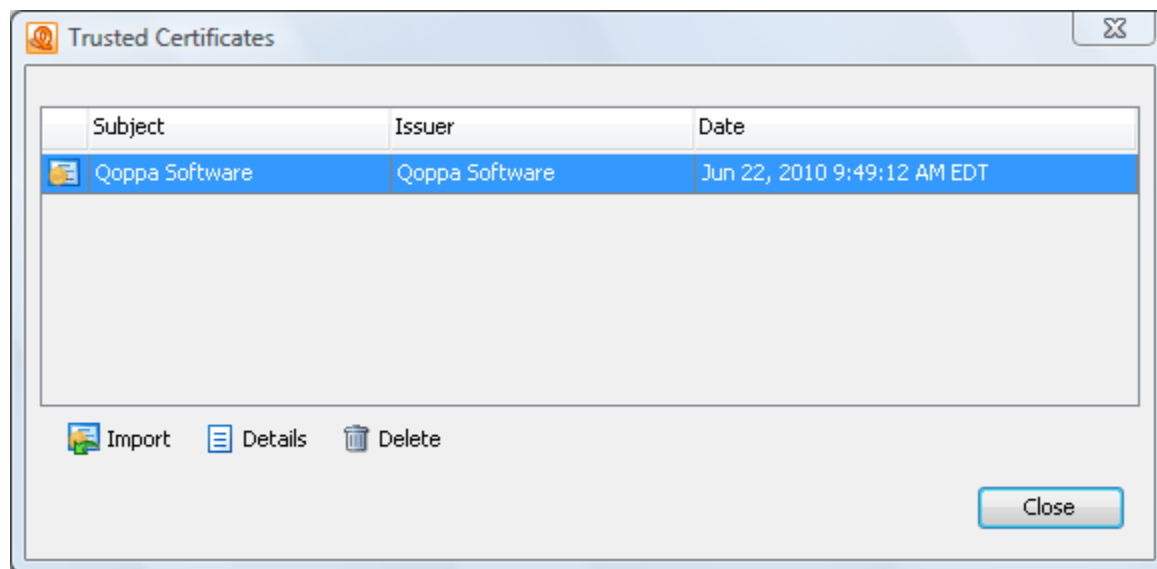
- Import - Opens a dialog to import certificates
- Details - Displays details of the selected certificate
- Delete - Removes the selected certificate

Manage Digital IDs

PDF Studio allows the user to manage the Digital IDs. To do so, open the Digital IDs dialog by selecting Security > Security Settings > Digital IDs from the top toolbar.
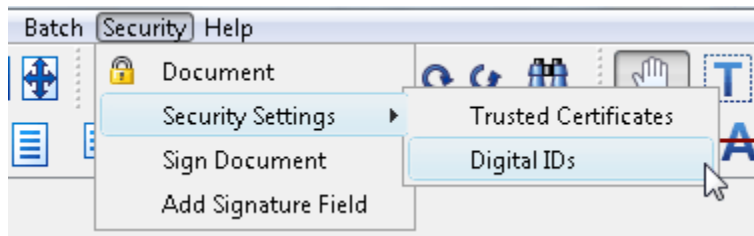
This will open the Digital IDs dialog.
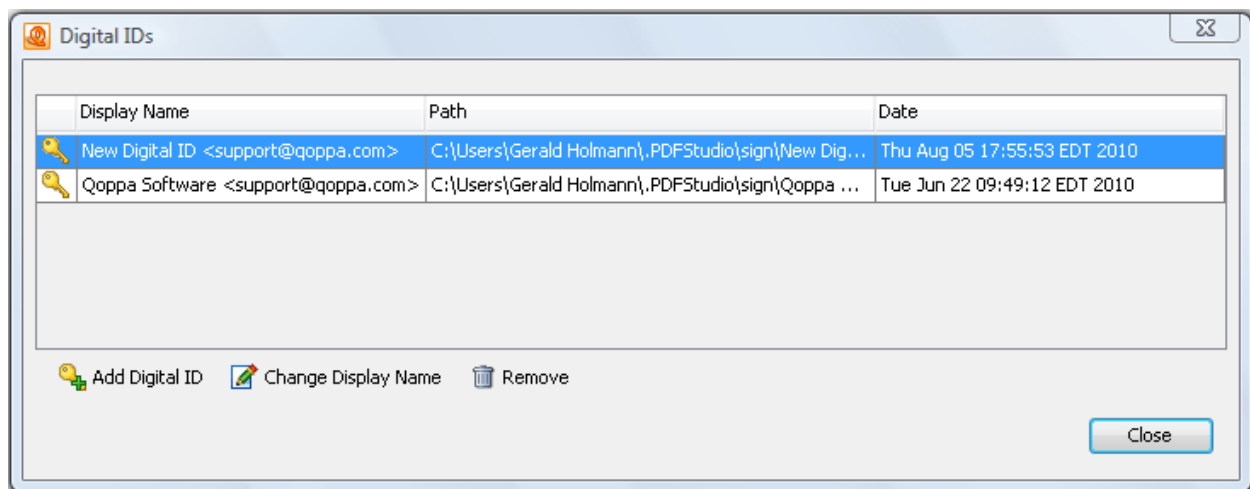
- Add Digital ID - Opens a dialog to create or import a digital ID
- Change Display Name - Changes the display name of the selected digital ID
- Remove - Removes the selected digital ID

Document Properties

To open the Document Properties dialog, choose Document > Document Properties from the top tool bar. The application will display the Document Properties dialog.
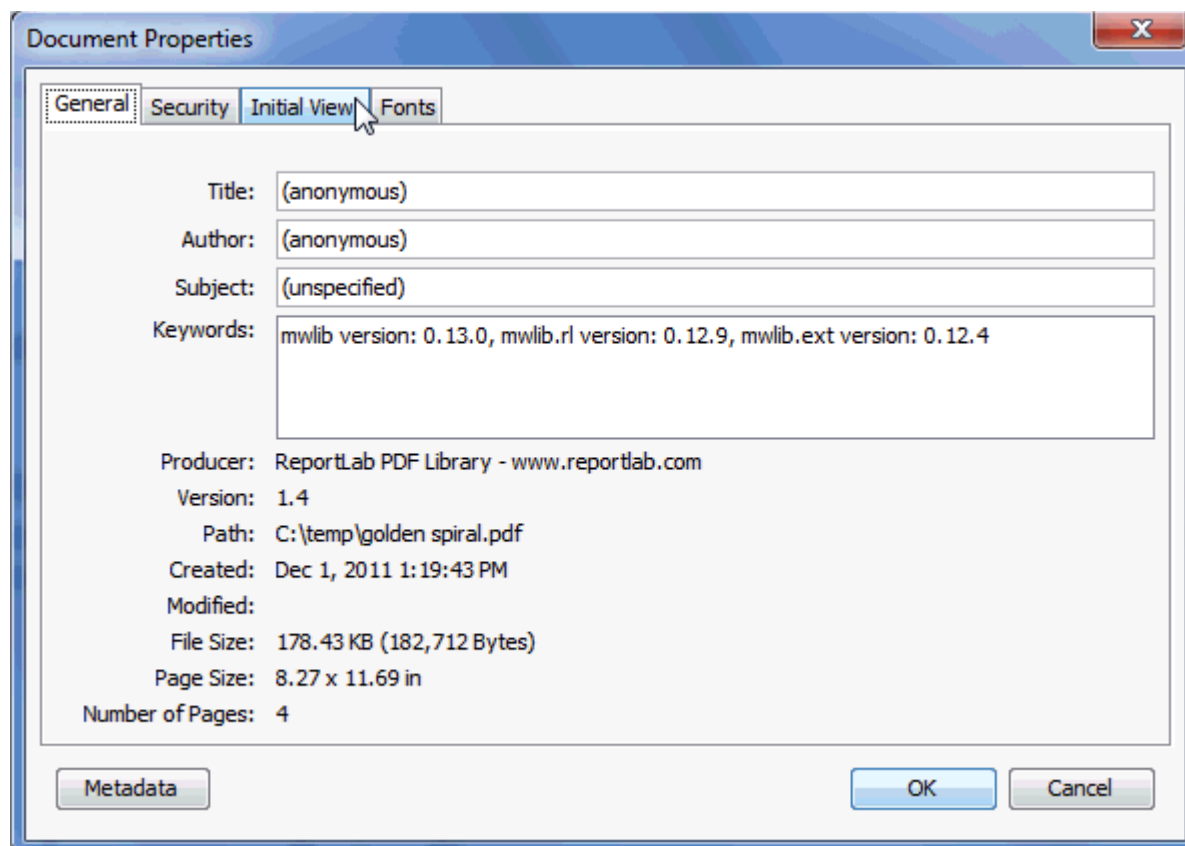
This dialog has the following four tabs:

General
Security
Initial View
Fonts

General

The general tab allows you to view and edit title, author, subject, and keywords. It allows you to view the producer, created date, modified date, file size, page size, and file metadata.

Security

Set Security – Set passwords and permissions.

Initial View
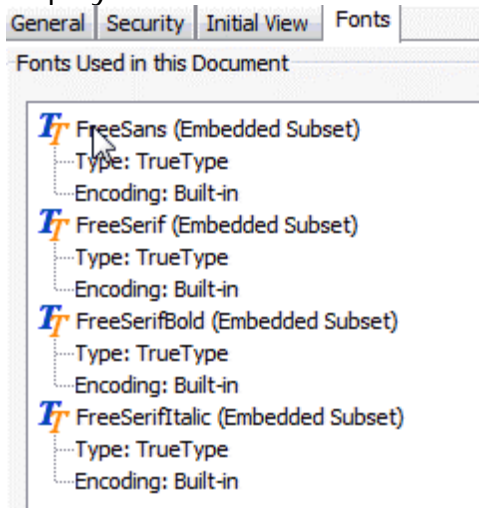
Set Initial View – Modify the properties that determine how the document will be initially displayed.

Fonts

Displays a list of fonts used in the document.

Compare, Loupe, Pan and Zoom

PDF Studio has several options for close inspection and comparison of PDF documents.

- [Compare Side by Side](#)

- [Loupe](#)

- [Pan and Zoom](#)

Compare Side by Side

As of PDF Studio 7, you can view two documents at the same time using Compare Side by Side in the File menu.

1. Click on the File menu and select Compare Side by Side

2. A large window will open with two full sets of toolbars inside. Click on the Open button 📂 in each pane to open the versions of the file you want to compare.

3. Once the documents are loaded, the file paths will show in the window title. The documents are locked together with synchronized scrolling, making it easy to spot the differences between the two versions.
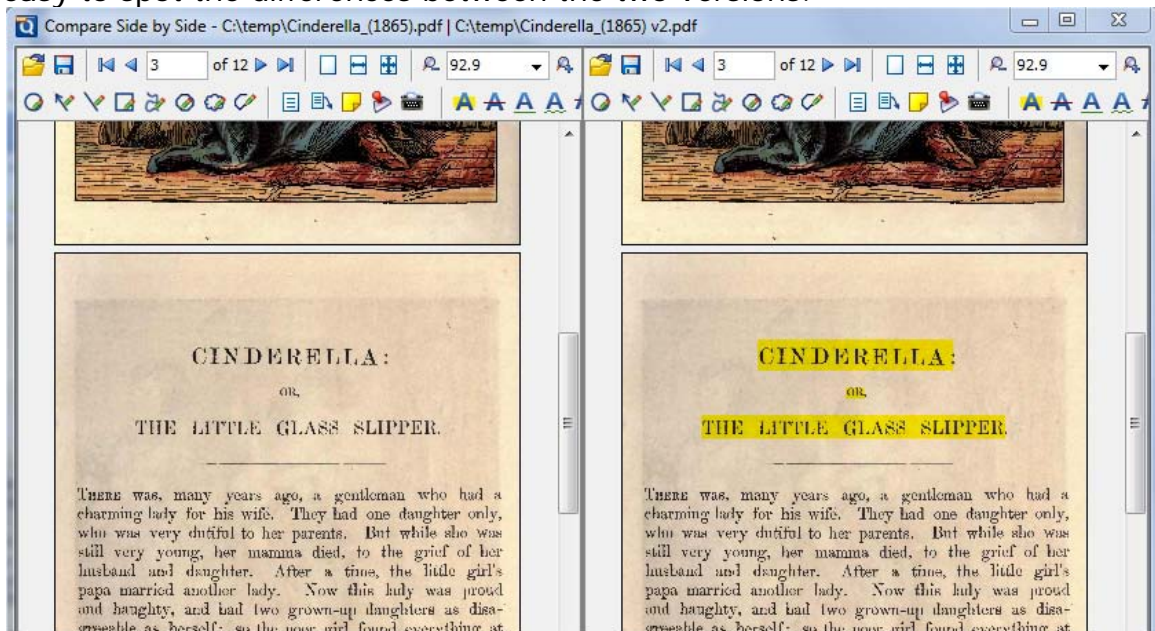
4. The [Loupe](#) tool 🔍 will zoom in on the document's differences to allow a closer comparison.
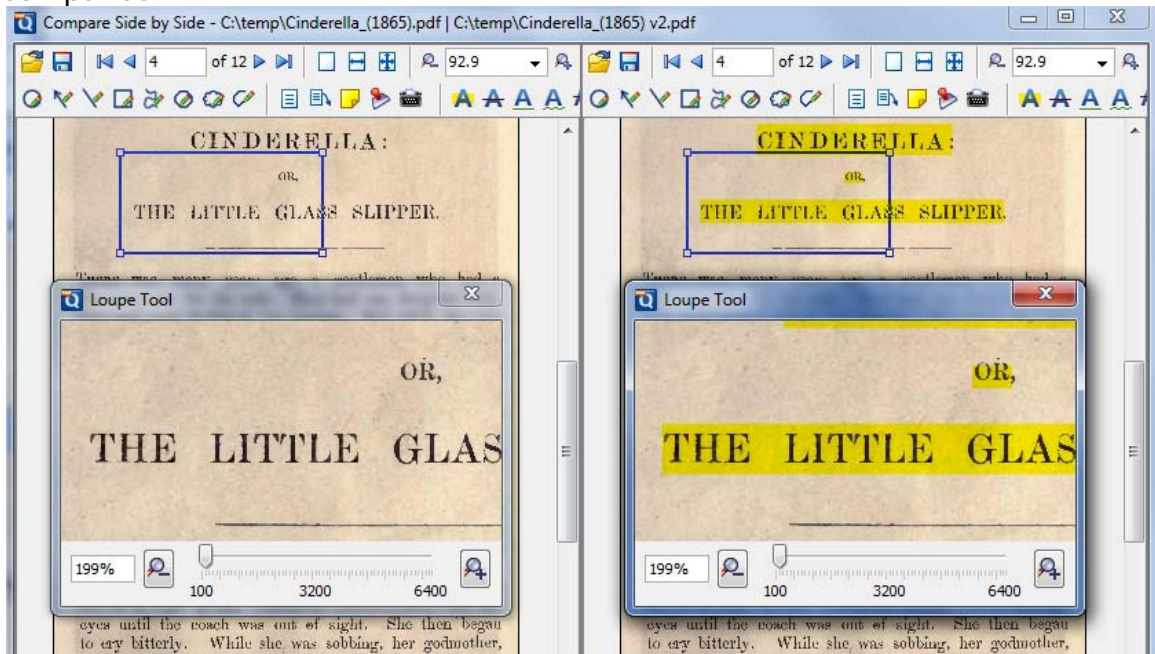
5. While in Compare Side by Side mode, each copy is still editable so you can copy changes from one version into another or add new content.
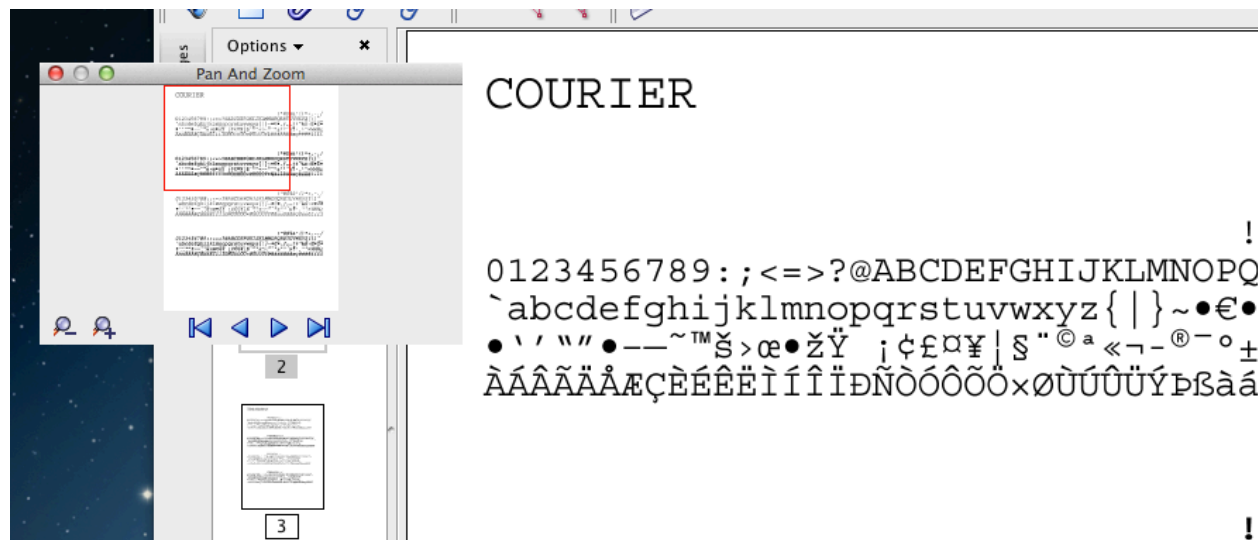
Loupe

A draggable rectangle that zooms in on the PDF to show the smallest detail
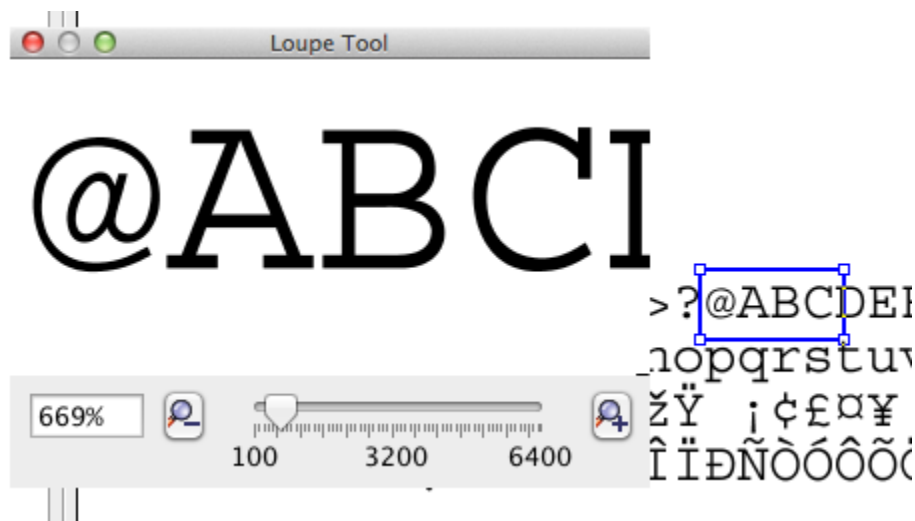
Pan and Zoom

A window showing the portion of the page currently on screen. Drag the red box to adjust the view of the document.

Invert Colors

Invert colors when rendering a PDF document.

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 user preference to invert colors on all documents or on any currently open document from the View menu.

Approximate and true golden spirals: the green spiral is made from quarter-circles tangent to the interior of each square, while the red spiral is a golden spiral, a special type of logarithmic spiral. Overlapping portions appear yellow. The length of the side of a larger square to the next smaller square is in the golden ratio.

Import and Export Pages

PDF Studio allows you to export the pages of the current document as images or to import images as pages in the current document. To do so, click Images from the top toolbar and then choose the appropriate option.

Export pages as JPEG – Exporting pages of the current document in JPEG format
Export pages as TIFF – Exporting pages of the current document in TIFF format
Export pages as PNG – Exporting pages of the current document in PNG format
Export pages as GIF – Exporting pages of the current document in GIF format
Import Images as Pages – Importing images as new pages in the current document
Import Image as Stamp – Importing an image as a stamp in the current document

Export pages as JPEG

To export pages as JPEG, choose Images > Export Pages as JPEG from the top toolbar. The application will display the Export Pages as JPEG Images dialog. Choose the appropriate options in the dialog and click the OK button to start.
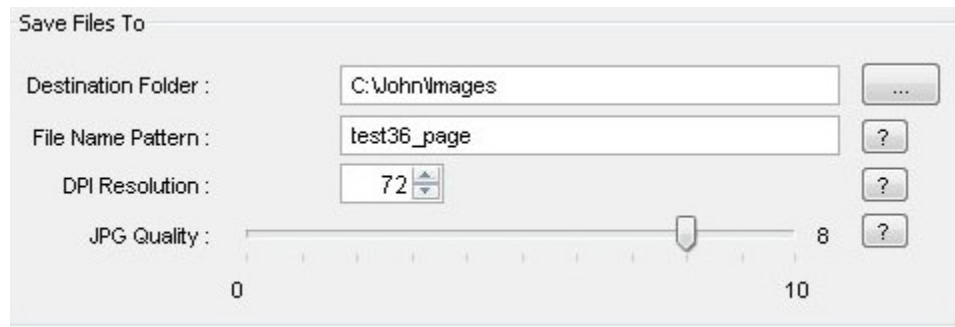
The options in the Export Pages as JPEG dialog box are as follows:

- **Destination Folder** – Select the directory where you wish to save the images. Click on the browse button to browse to the desired directory or type in the directory in the text box.
- **File Name Pattern** – Enter the desired pattern for the output file names. Current page number and file extension (.jpg) will be appended to the pattern to create the final file name.
- **DPI Resolution** – Choose the desired resolution in DPI used to render the page. 72 is the native PDF resolution.
- **JPG Quality** – Select the desired quality of JPG compression. Compression varies
  - ○ From 0 – very high compression – very low quality
  - ○ To 10 – low compression – very high quality

Based on the quality parameter. Some guidelines for the quality value: 8 high quality, 5 medium quality, 2 low quality.

Export Pages as TIFF

To export pages as TIFF, choose Images > Export Pages as TIFF from the top toolbar. The application will display the Export Pages as TIFF Images dialog. Choose the appropriate options in the dialog and click the OK button to start.

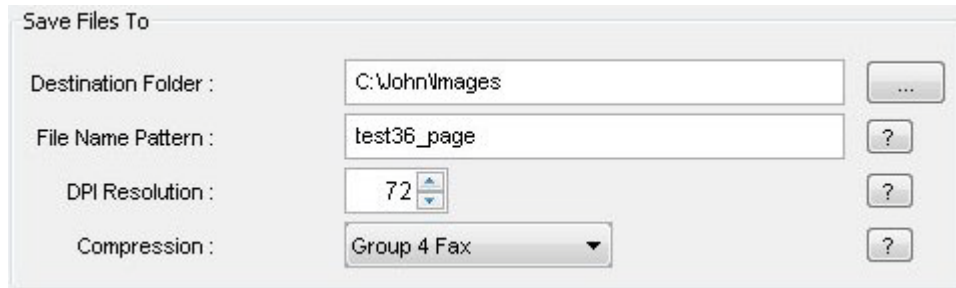The options in the Export Pages as TIFF dialog are as follows:

- **Destination Folder** – Select the directory where you wish to save the images to. Click on the browse button to browse to the desired directory or type in the directory in the text box.
- **File Name Pattern** – Enter the desired pattern for the output file name. Current page number and file extension (.tif) will be appended to the pattern to create the final file name.
- **DPI Resolution** – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution.
- **Compression** – Choose the compression to use. Available compressions are: CCIT RLE, Group 3 Fax, Group 4 Fax, Pack Bits, LZW, ZLib, Deflate, No Compression. The most standard one is Group 4 Fax, which is optimized for faxing.

Export Pages as PNG

To export pages as PNG, choose Images > Export Pages as PNG from the top toolbar. The application will display the Export Pages as PNG Images dialog. Choose the appropriate options in the dialog and click the OK button to start.

The options in the Export Pages as PNG dialog are as follows:

- **Destination Folder** – Select the directory you wish to save the images to. Click on the browse button to browse to the desired directory or type the directory in the text box.
- **File Name Pattern** – Enter the desired pattern for the output file names. Current page number and file extension (.png) will be appended to the pattern to create the final file name.
- **DPI Resolution** – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution.

Export Pages as GIF

To export pages as GIF, choose Images > Export Pages as GIF from the top toolbar. The application will display the Export Pages as GIF dialog. Choose the appropriate options in the dialog and click the OK button to start.

The options in the Export Pages as GIF dialog are as follows:
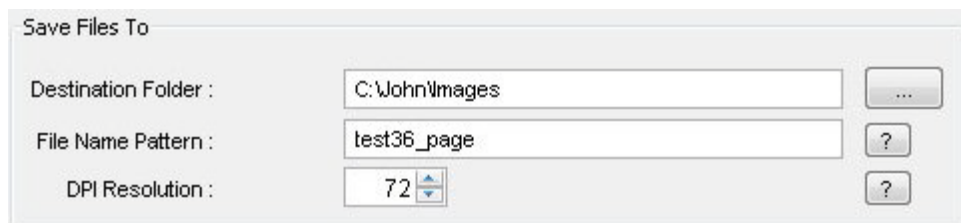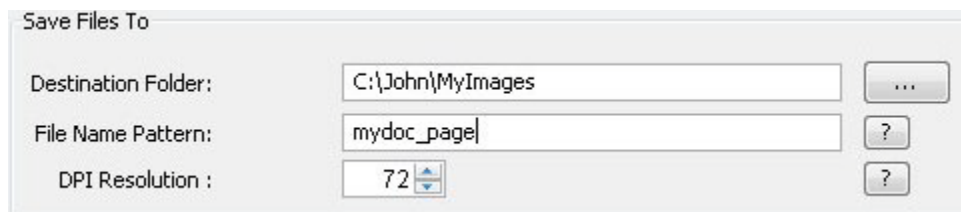
- **Destination Folder** – Select the directory you wish to save the images to. Click on the browse button to browse to the desired directory or type in the directory in the text box.
- **File Name Pattern** – Enter the desired pattern for the output file names. Current page number and file extension (.gif) will be appended to the pattern to create the final file name.
- **DPI Resolution** – Choose the desired resolution in DPI used to render the page. 72 is the PDF native resolution.
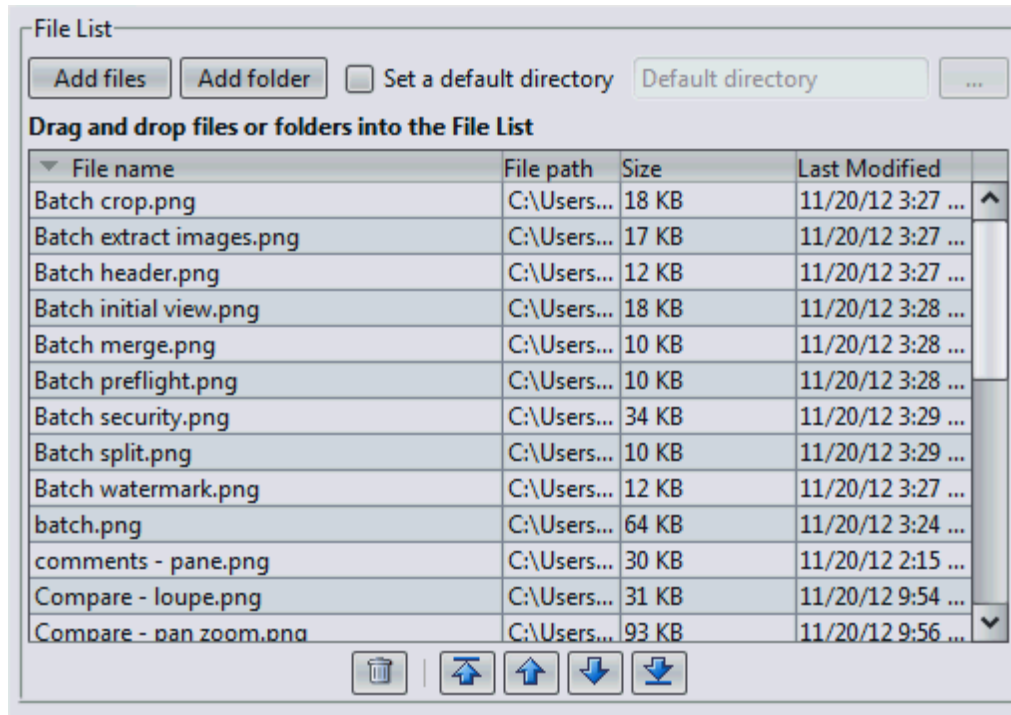
Import Images as Pages

Images of these types may be imported as pages: gif, jpeg, jpg, png, tif, and tiff.

To import images in the current PDF document, choose Images > Import Images as Pages from the top toolbar. The application will display the Import Images as Pages dialog. Compile a list of images to import, or choose a source folder, and press the start button.

Import an Image as a Stamp

To import an image as a stamp in the current PDF document, choose Images > Import Image as Stamp from the top toolbar. The application will display the File Chooser dialog. Select an image file and then click the document where you would like to apply the stamp.

This can also be done by using the Image button on the annotation toolbar, or by choosing Comments > Add Image.

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 that will be saved as part of user preferences.

Snapshot Tool

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

To use the snapshot tool, select the snapshot tool icon from the toolbar.

After selecting the tool, drag the mouse over the page to select the snapshot area.
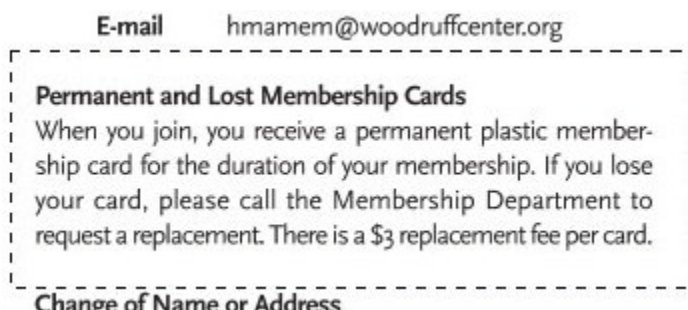
When the mouse button is released, an image will be created from the selected area. The image will be copied to the system clipboard and saved as a file.

The destination and format of the output image can be set in the user preferences under General > Snapshot.

Forms
[Fill and Save PDF Forms](#)
[Javascript](#)
[Export Form Data](#) **Pro**
[Import Form Data](#) **Pro**
[Reset Form Fields](#)
[Flatten Form Fields](#)
[Highlight Form Fields](#)

Fill and Save PDF Forms
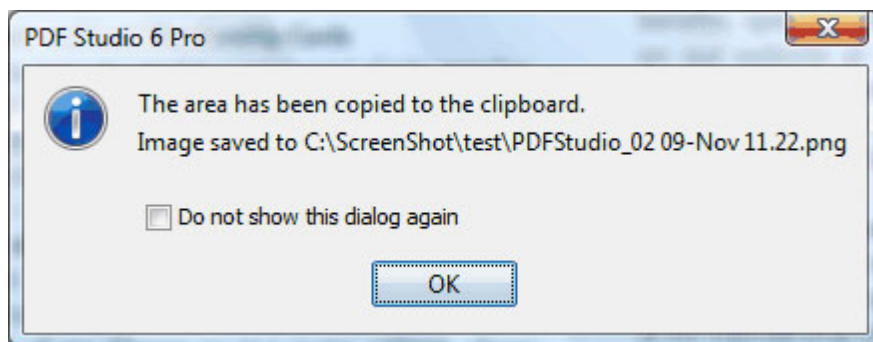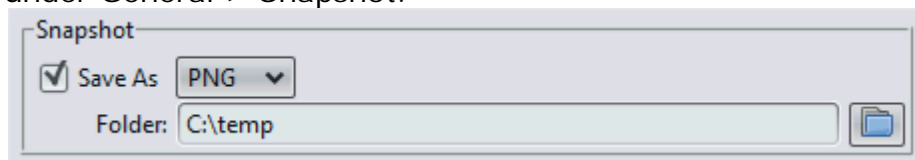
To fill a PDF interactive form, simply open the document by clicking File > Open and start filling it. PDF Studio works with the following form fields: text fields, combo boxes, check boxes, lists, radio buttons and signature fields. The ability to tab through fields makes it easy to fill the form.

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](#).

To save the PDF form, simply save the PDF document by clicking File > Save. This will save all the data you entered in the form.

Javascript

PDF Studio supports Acroform (non-LiveCycle) Javascript in PDF forms.

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.

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

Export Form Data

This feature allows you to export data from the current form into a file in FDF or XFDF format.

To export form data:
1. From the top toolbar, choose Forms > Export Form
2. Select whether to export in FDF or XFDF format

3. The application will open a file chooser dialog. Select the file and location you wish to export to

Import Form Data

This feature allows you to import form data from a file into the current form. The file can be in FDF or XFDF format.

To import form data:
1. From the top toolbar, choose Forms > Import Form
2. Select whether to import in FDF or XFDF format
3. The application will open a file chooser dialog. Select the file you wish to import from

Reset Fields

This feature allows you to 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.

To reset fields, from the top toolbar, choose Forms > Reset Fields

Flatten Fields

This feature allows you to 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.

To flatten fields, from the top toolbar, choose Forms > Flatten Fields

Highlight Fields

This feature allows you to highlight all fields in the form, making them easier to locate.

To highlight fields, from the top toolbar, choose Forms > Highlight Fields

This will add a checkmark next to the menu item Highlight Fields and the fields in the page will be highlighted with a light blue/purple color. To remove the highlighting, simply choose Forms > Highlight Fields again. This will remove the checkmark next to the menu item, and the fields will return to their original appearance.

Preflight Verification

PDF Studio can verify document compliance with the following PDF/X standards:

- 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

Preflight a document
Preflight a batch

Preflight a document

To start a preflight operation, choose Document > Preflight from the menu and choose the standard that you would like to use to check the document. Alternatively, you can also press Ctrl+Shift+x to show the Preflight dialog.

From this dialog, you can choose the desired format and then press Execute to run compliance checking. When the Execute button is pressed, the application will check the document and then display the following dialog with the results:
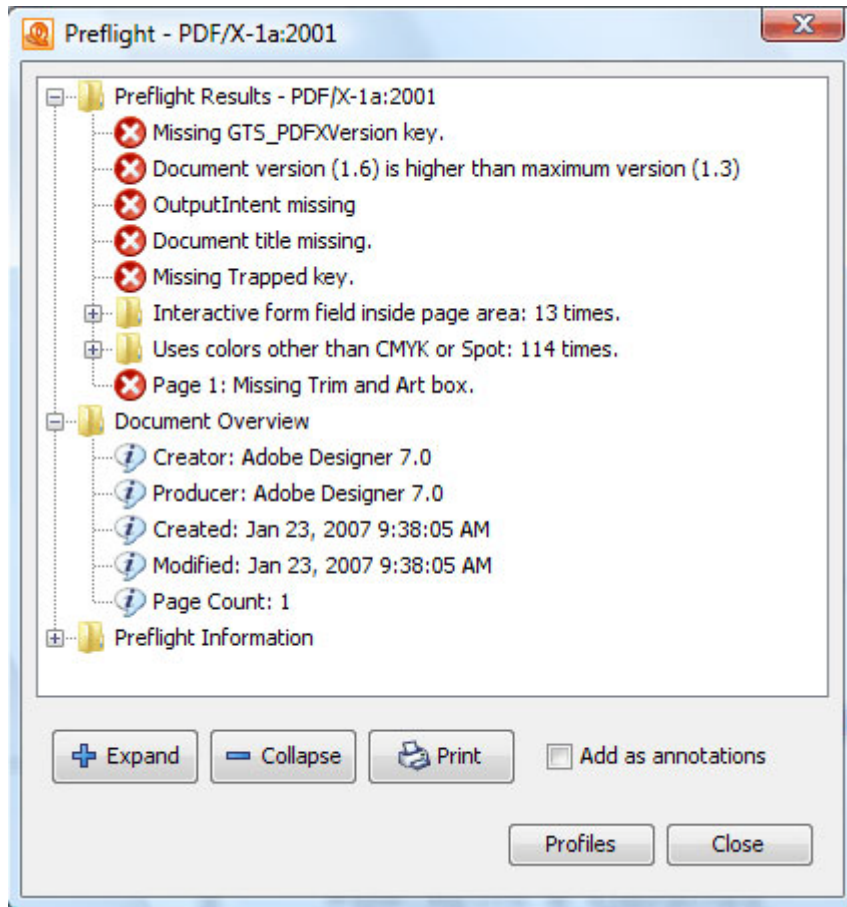
This dialog lists any content in the document that is not compliant with the given specification. To add annotations to the PDF document where compliance problems were detected, check the **Add as annotations** box before closing the dialog.

Preflight a Batch

Preflight a batch