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Customer Orientation Guide

PDF Converter Enterprise 7

August 2010

PDF Converter Enterprise 7

Congratulations on your purchase of PDF Converter 7. This product was designed specifically for the business user, PDF Converter 7 is intelligent and easy to use, putting commonly used creation, conversion and collaboration features just a click away. You can enjoy incredible time savings and the flexibility of a universal document format for higher productivity and seamless information exchange. Instantly create 100% industry-standard, universally viewable PDF files from any PC application. Convert to PDF from within Microsoft® Office documents or create PDF files of any document with a single click while browsing with Windows®. PDF Converter 7 provides the most accurate conversion of PDF files into editable, searchable XPS, Corel® WordPerfect° and Microsoft® Word, Excel® or PowerPoint documents — complete with fully-formatted text, columns, tables and graphics. Collaborate more effectively with annotation tools that let you add notes, stamps, call-outs and more to PDF documents. This Customer Orientation Guide will familiarize you with the most popular features found within the application.

Table of Contents

Chapter 1: Introducing PDF Converter 7

Section 1.1 - About the Product

PDF Converter 7 is a complete Network To Desktop Office Scanning Solution. With it, users can:

- Create and share PDFs with any application.

- Convert PDF files into editable, fully-formatted Microsoft Office and Corel WordPerfect files

- Edit directly within a PDF file, adding copy, rearranging words and even changing graphics

- The product was designed to deliver significant time savings back to customers

PDF Converter 7 is fast and easy to install, too. You can conveniently service all enterprise users with network push install and software access options through virtualized software environments.

Designed specifically for the business user, PDF Converter 7 is intelligent and easy to use, putting commonly used creation, conversion and collaboration features just a click away. So you can enjoy incredible time savings and the flexibility of a universal document format for higher productivity and seamless information exchange.

Instantly create 100% industry-standard, universally viewable PDFs files from any PC application. Convert to PDF from within Microsoft® Office documents or create PDF files of any document with a single click while browsing with Windows®.

PDF Converter 7 provides the most accurate conversion of PDF files into editable, searchable XPS, Corel® WordPerfect® and Microsoft® Word, Excel® or PowerPoint documents, complete with fully-formatted text, columns, tables and graphics. It even lets you combine all pages of a PDF document into a single Excel worksheet. Support for Windows 7 Jump Lists provides quick access to recent files and common PDF creation and conversion tasks.

Combine files and remove or replace pages with drag-and-drop ease. View and select pages from a source document (Word, Excel, PowerPoint, WordPerfect, XPS, JPG, BMP or TIF) to insert into a target document. It makes document assembly faster and simpler than ever.

Users across the enterprise can collaborate more effectively with annotation tools that let you add notes, stamps, call-outs and more to PDF documents. Plus, it's easy to view, organize, prioritize and update comments using the convenient Comment Panel.

PDF Converter 7 enables you to deliver documents that look as good in print as they do on the screen, no matter where you send them. Combine any type of file and/or folder into striking PDF Portfolios that are viewable with any popular PDF reader. Add attractive, interactive cover pages that guide the audience.

Even include photos, graphics, movies, audio or 3D drawings to convey messages with attention-grabbing style!

With the most accurate conversion to searchable PDF available, you can search everything in a PDF document. Use the intelligent "Looks Like" search capability to quickly find content, like phone numbers, email addresses and Social Security numbers, via an alphanumeric pattern rather than text. Automatically highlight, cross-out, underline or redact search results for faster, easier editing.

As you can see, it packs a lot of features into one easy to use application! Again, congratulations on your purchase! We hope you find this Customer Orientation Guide useful in your day to day use of the application.

Chapter 2: PDF Converter Enterprise 7 Features

Section 2.1 - Getting Started

This chapter covers the feature set that makes up the PDF Converter 7 application. Let's first learn about the PDF file format and some key definitions.

What is a PDF?

The Portable Document Format (PDF) was created in 1993 to help alleviate the problems associated with electronic document exchange at that time. PDF files were designed as a way to encapsulate a complete document. PDF documents are each self-contained, packing text, graphics, and fonts into a single file.

PDF has become the de facto standard for digital document collaboration in the workplace. As an approved ISO standard, a standard that is implemented by over 1,800 hardware and software vendors, a PDF is a PDF no matter what manufacturer's software was used to create it.

Popular Uses of PDF

In addition to document exchange, some of the more popular uses of the PDF format include:

- Applying security to documents

- Document assembly / Document splitting

- Document sharing and collaboration

- Document markup or annotating documents

- Online form filling and form creation

- Archiving documents / mail

Definitions

In progressing through the Orientation Guide, you may come across terms that are unfamiliar to you. Here's a list of some of some key terms that will help you better understand the PDF Converter 7 application.

- **Creation** - The process of taking a document in some format, and using that file as the source for creating a PDF file.

- **Conversion** - The process of taking a PDF file, and turning it back into a fully-formatted, editable document in another format such as Word, Excel, PowerPoint, and WordPerfect.

- **OCR** - OCR stands for Optical Character Recognition or the process of identifying and inserting text based only on recognizing the characters from an image or picture.

- **Image-Only PDF** - Image-only PDF refers to a type of PDF file that was created either by a scanner or was created using a "Print as Image" setting into the PDF format. Image-only PDF files are literally just pictures of the pages of the document with no textual information associated with them. As a result, image-only PDF files cannot support text searching or editing unless they have been converted to a Searchable PDF.

- **Searchable PDF** - Searchable PDF refers to an Image-only PDF that has been converted using OCR. In that conversion process the text from the image-only PDF is recognized and inserted invisibly behind the image of the page. The result is a file that looks like an image-only or scanned document, but has searchable text hidden within the file.

- **PDF Normal** – PDF Normal refers to a PDF file that was created from a digital document. As a result, PDF normal files can be searched and edited natively within PDF solutions, without the need to run a conversion.

- **Document Assembly** - Document Assembly refers to the process of creating a single PDF file from multiple source files. Document assembly can also refer to the ability to re-arrange pages within the document; replace, extract or delete pages from the document; and taking any necessary steps, such as updating headers/footers and page numbers, to provide a single unified document.

- **PDF Packages** - PDF Packages are a collection of files, both PDF and other file types converted to PDF, stored within a PDF "wrapper" similar to the Winzip process. Packages provide a mechanism for organizing your documents into a single grouping rather than sharing multiple individual files. PDF Packages differ from document assembly in that within a PDF Package each file is discrete, not merged with the other files. As a result, each document can have its own security settings within the package.

- **PDF Portfolios** - PDF Portfolios are the next generation of PDF Packages. Where Packages allow you to include PDF and other file types, Portfolios allow you to include PDF, other file types in their original file format, and even folders. Now you can build entire folder hierarchies within a single PDF file with a much more polished presentation layer that can include video or flash instructions on how to utilize the files within the Portfolio.

- **DMS** - DMS stands for Document Management Systems, server based solutions that act as a repository for an organizations documents.

System Requirements

To install PDF Converter 7, the following system configuration is required:

• A computer with an Intel® Pentium® III or higher processor or equivalent

• Supported operating systems:

- Windows 7 32-bit and 64-bit Editions

- Windows Vista 32-bit or 64-bit Editions with Service Pack 2

- Windows XP 32-bit Edition with Service Pack 3

• Microsoft® Internet Explorer®7 or above

• 512 MB of memory (RAM), 1 GB recommended

• 500 MB of free hard disk space for application files plus 50 MB working space during installation

• CD-ROM drive for installation

• Web access needed for product registration, activation and obtaining live updates for the program.

• To save DOCX, XLSX and PPTX files (for Microsoft Office 2007 or 2010 Word, Excel and PowerPoint) you should have or install Microsoft .NET Framework 3.0 on Windows XP (free download available at www.microsoft com).

Note: Performance and speed will be enhanced if your computer's processor, memory and available disk space exceed minimum requirements.

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Software Installation

To install PDF Converter 7, the following system configuration is required:

Before you begin, you should verify that you have administrator rights on the computer that you're going to install the application. If you're not sure, ask a local member of your organization's IT department for assistance.

Step 1. Insert the CD-ROM in your CD-ROM drive

The installation program will start automatically. If it does not, locate your CD-ROM drive in Microsoft® Windows® Explorer and double-click the program's AutoRun.exe file. Select a language for installation. The InstallShield® Wizard will appear. (If you have downloaded the program from a web site, double-click the autorun.exe file.)

Step 2. License Agreement and Serial Number

You must accept the license agreement in order to proceed. You will then be asked to enter a serial number. You will find this on the CD sleeve provided to you by your MFP provider. Be sure to keep the serial number in a safe place; it is fully checked only during product activation and is also needed for any re-installations.

Step 3. Setup Type, Location and Options

Like most applications, you'll have the opportunity to select entire a *Complete* or *Custom* installation. *Complete* installs all software components while *Custom* lets you be more granular about which components are installed. The most common installation is to select *Complete*. The installer offers a default location for the program. Accept it or define a different one. You will also be prompted about application preferences, such as whether or not PDF Converter 7 becomes your system's default PDF viewer.

Step 4. Finish Installation

Registration runs at the end of installation. Select *Register Online* to establish a connection to the Nuance web site. We provide an easy electronic form that can be completed in a few moments. When the form is filled, click *Submit*. If you decide not to register or to be reminded later, you can go to http://www.nuance.com to register online any time later. Click on *Support* and from the main support screen choose *Product Registration*. For a statement on the use of your registration data, please see Nuance's Privacy Policy.

Section 2.2 - Creating PDF Content

The next several sections introduce how to perform common tasks in the application. We'll learn about how to navigate around the application and get familiar with the capabilities of the product by introducing Diana.

Name: Diana Vega

Office: Sunnyvale, CA

Background:
Several years of experience managing projects related to technology tutorials. Familiar with coordinating communication and tasks between multiple team members. She finds the flow of information scattered and confusing sometimes, due to inefficiancies.

Diana Vega

Diana is working on a project for a client that involves several of her co-workers. She has created a number of documents that she needs to get input on and she wants to use PDF Converter Enterprise 7 to facilitate the collaboration. We will follow Diana as she and her co-workers use the product to work through the creation, revision, presentation, and security of her project.

Using the MS Office Toolbar

Once Diana has installed PDF Converter 7, she can create a PDF from any document in Microsoft Office with these buttons on her toolbar.
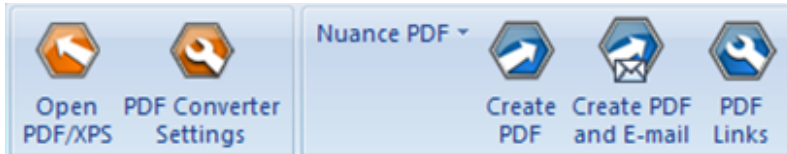
She can use these buttons from Microsoft Word, Excel, or PowerPoint. She can do this as PDF Converter 7 is tightly integrated within Microsoft Word, Excel, PowerPoint, Internet Explorer, and Outlook. (Supported in MS Office 2003, 2007 & 2010)

Bookmarks, links, and comments can be automatically transferred to the PDF according to her preferences.
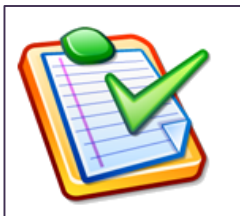
Try this out yourself!

Step 1. With a document open in MS Word, Nuance PDF short-cut icons can be found in the toolbar.
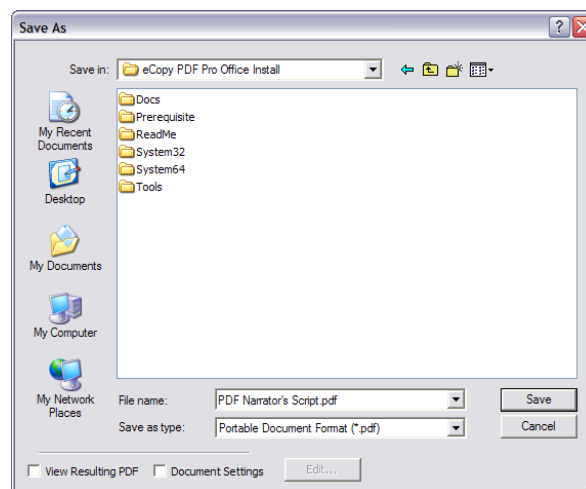
Step 2. Click the *Create PDF* icon, the Windows *Save As* dialog box will appear and you would select a location to save the resulting PDF file and name the file.

Step 3. Click *Save* to complete the task. You now have a newly created PDF from the Word document.

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Using the PDF Create Assistant

Diana's project actually involves several files. Instead of opening each one and creating separate PDF files from within each application, she can use the PDF Create Assistant to select several files for conversion in a single process. Using the profiles button, she can determine settings for her entire collection of documents.
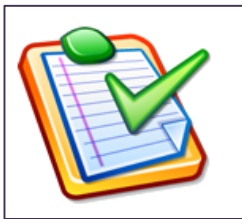
Try this out yourself!

Step 1. Launch the PDF Create Assistant by clicking *Start > Programs > eCopy Applications > PDF Create Assistant.*

Step 2. Click *+Add* to begin to select files. Select "Open files…" from your local PC documents for conversion.
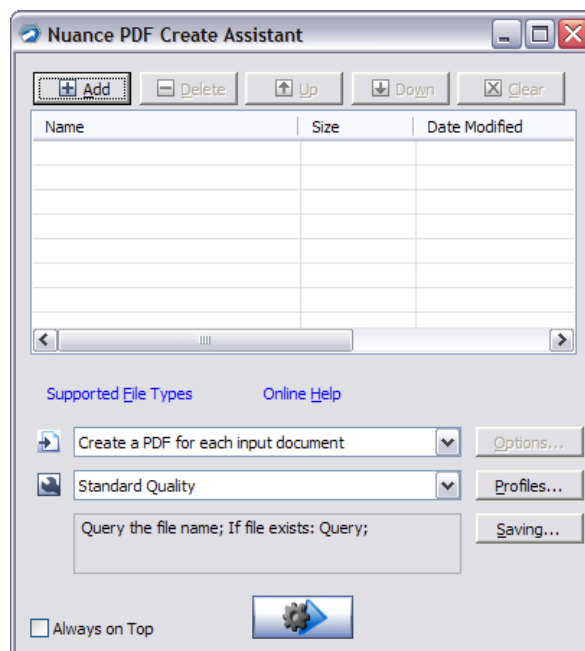
Step 3. Browse and select the documents you wish to work with and click *Open*.

Step 4. Once you have selected all the files you wish to convert, click the *Start PDF Creation* icon:

Document Assembly and Page Assembly

Diana also has several files that she wants to combine into a single document. Some are in Microsoft Word, some are in Excel, some are already in PDF format and she wants to combine these documents with some, but not all, PowerPoint slides she created for an earlier presentation to the client. She is going to use the Document Assembly feature to complete this project.
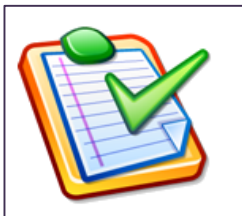
Try this out yourself!

Step 1. Open any multi-page document.

Step 2. Select *View* and then *Document Assembly*. Pages can now be easily shuffled with simple Drag and Drop control**.**
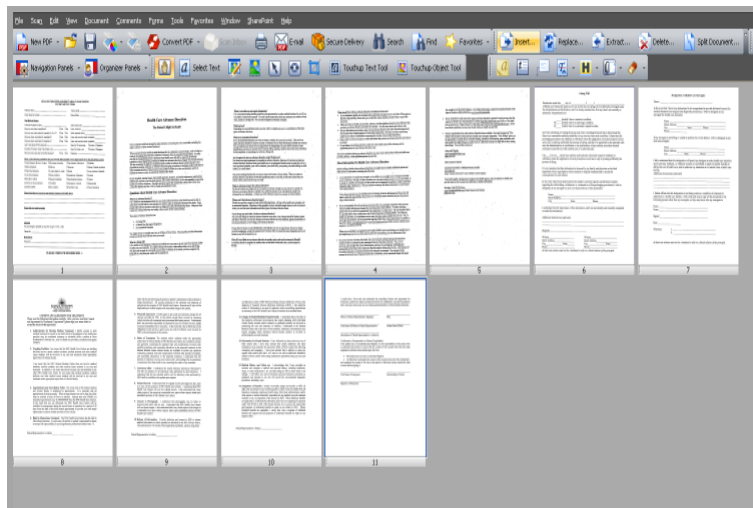
Step 3. To add additional pages, select the *Insert* icon and choose additional files or pages to add, or simply drag and drop files, even non-PDF files, into the view.

Step 4. Select *Page Assembly* from the *Document Assembly* toolbar.
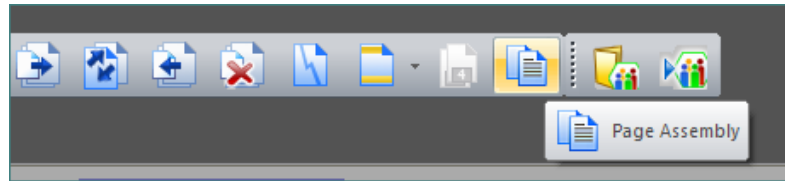
Browse to another file on your system. You will then see the Page Assembly dialog window where you can select one or more pages from a given document and merge them without having to open up the document's source application.
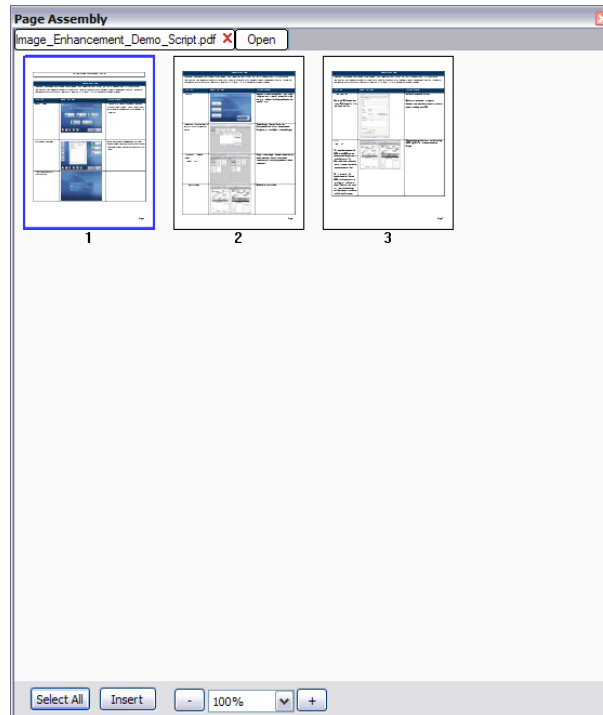
Using Scan Inboxes

Diana is going to include some material for her client that is currently only available in hard copy and needs to be scanned in. She can add these files from any multi-function device using the eCopy ShareScan application. Her hard copies are from an older project and will need some revision, so she will use the editing features within PDF Converter 7 to tackle that task.

Everyone on the network can scan documents from a networked scanning device to *Scan Inboxes*. Scan Inboxes are locations on the network where you can store personal documents. They work in conjunction with the eCopy ShareScan product. A coworker might scan a document at the office MFP into your Scan Inbox. You can configure PDF Converter 7 to monitor your inbox and automatically notify you when a document has arrived in your inbox.
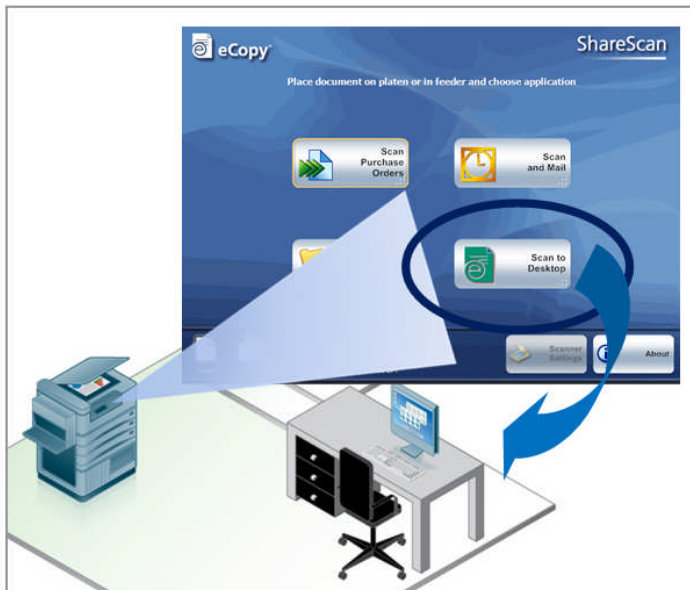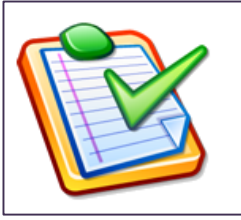
Try this out yourself!

Step 1. To configure a Scan Inbox location, click

Edit > Preferences.

Step 2. Ask your IT administrator if your organization uses

Scan Inboxes, and if so, where they are located on the network.
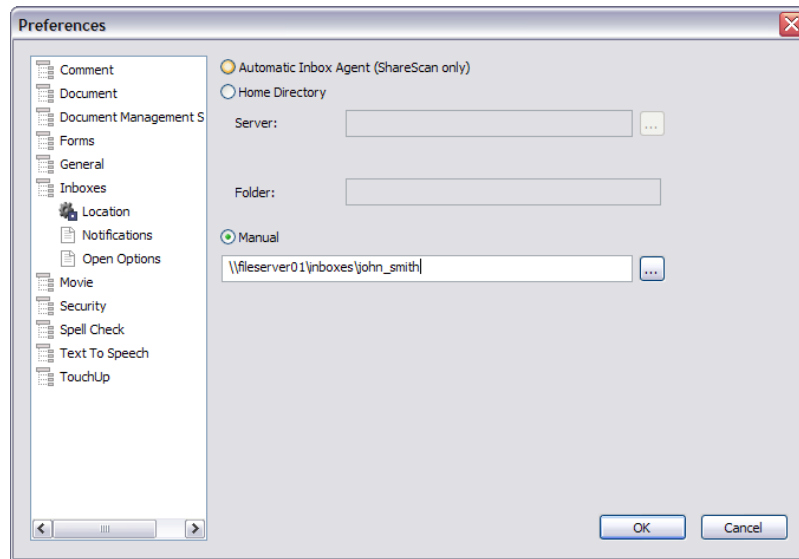
Step 3. Enter the path to your inbox and set your notification

options using the configuration screens provided.

Step 4. Once you've configured your inbox,

you can one touch access to it, by selecting

the *Scan Inbox* toolbar button
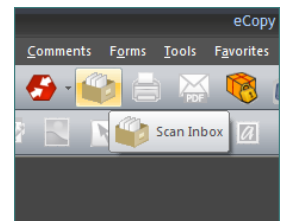
Creating PDF Portfolios

Now Diana needs to send several files associated with this project over to the client for input. She is going to package them in a Portfolio so that she can include some sample work created in Flash and organize the material into several different folders according to project phase. The Portfolio tool is going to allow her to present a more polished project, even though much of the material is still in draft form.

If you're not familiar with the term Portfolio, Portfolios are the "next generation" of PDF Packages. In addition to files, PDF Portfolios can include folders and even folder hierarchies for even better presentation and organization of your files. Portfolios also offer additional presentation tools such as an introduction page, which can include Flash movies, and instructions on how the included files should be utilized.

This screenshot shows a sample PDF Portfolio. These files are all related to a wedding / reception and include a reservation forms in multiple formats, photos, and a PDF checklist.
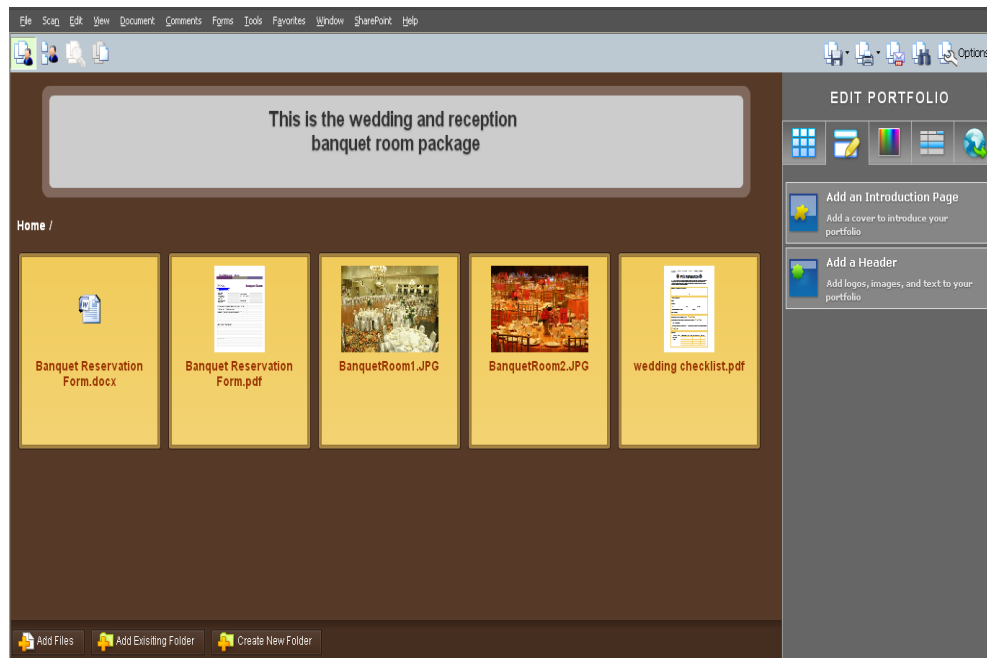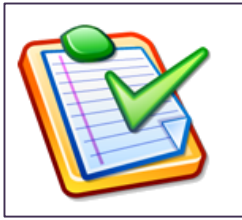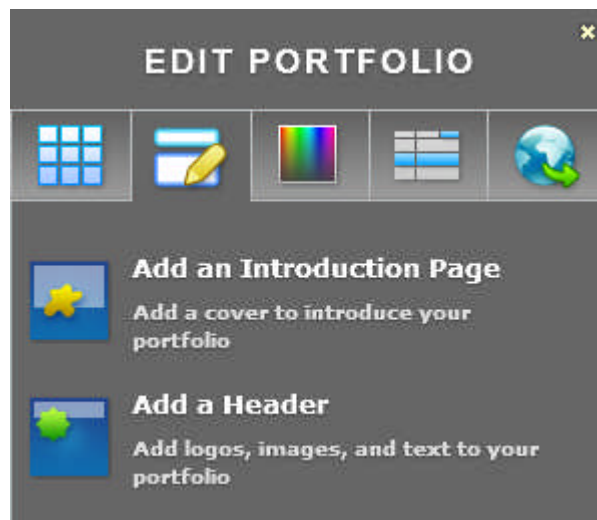
Try this out yourself!

Step 1. Select *File > Create PDF Portfolio*

Step 2. Use the *Add Files* and *Add Folders* to build the structure of your portfolio.

Step 3. Use the *Edit Portfolio* options on the right part of the window to customize your Portfolio. You can choose to add an introduction page, change the color scheme, and modify the file listing column headers.

Step 4. Once you have set your Portfolio attributes, click on the Globe icon (rightmost tab) to save and possibly distribute your PDF Portfolio as an email attachment.
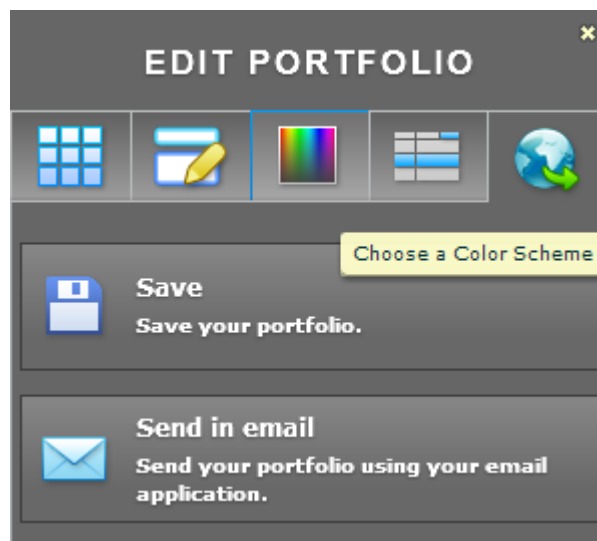
Section 2.3 - Convert PDF to MS Office Formats

Just as you can convert files from Microsoft Office and other applications to PDF, you can also convert PDF documents to Microsoft Office files. Following Diana's project, let's explore the various ways that she can work with PDF and Office applications to quickly convert material for editing.

Save PDF to Word

Diana has received material that her client wants added to their project. The files are in PDF format, and, using the converter button on her toolbar, Diana is going to convert them into Microsoft Word files for her team to add to their materials. Using PDF Converter she will be able to retain all the formatting of her document from font size to tables and column breaks and footnotes.
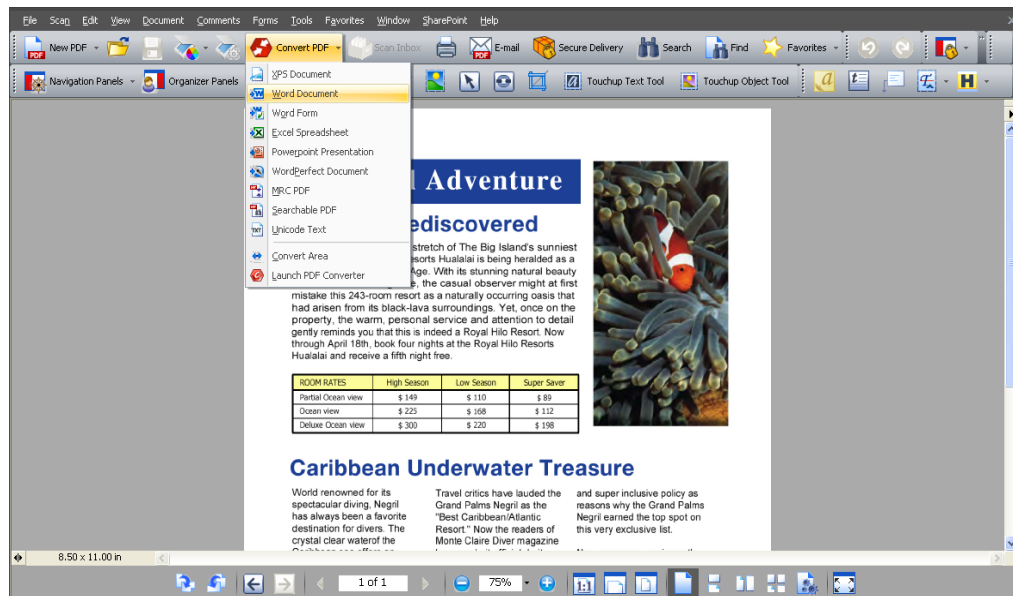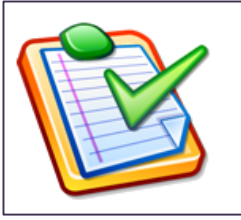
Try this out yourself!

Step 1. Open up any existing PDF document within PDF Converter 7.

Step 2. In the Toolbar, click on the *Convert PDF* icon and select *Word Document* option.
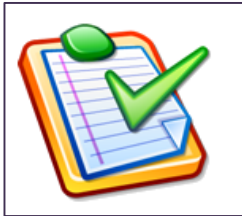
Step 3. Choose a place to save the converted document and click *OK*. You will see a brief processing stage where the application indicates it is working on your document.

Step 4. The document will be opened in Microsoft Word, scroll through the document and see that the elements in the Word document look exactly the same as the original PDF document.

Save PDF to Excel

Some of the material that Diana has received from her client is in spreadsheets. The files contain multiple pages and are in PDF format, and, Diana is going to convert them to Excel files for her team to add to their materials. As she does this, she will be able to select separate pages or portions of pages to convert and forward to the appropriate members of her team. Once the spreadsheets are converted, the data within those tables will become live data that can be edited.

Try this out yourself!

Step 1. Open up an existing PDF document with content that is appropriate, such as a PDF with data tables or spreadsheets formats.
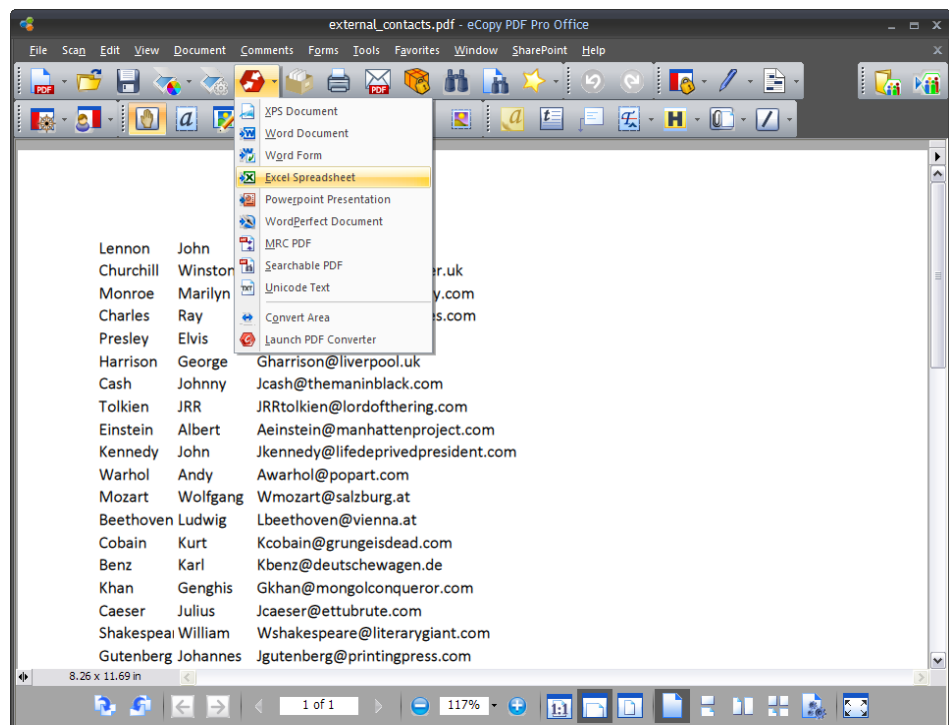
Step 2. In the Toolbar, click on the *Convert PDF* icon and select *Excel Spreadsheet* option.

Step 3. Choose a place to save the converted document and click *OK*. You will see a brief processing stage where the application indicates it is working on your document.

Step 4. The document will be opened in Microsoft Excel, scroll through the document and see that the elements in the Excel document look exactly the same as the original PDF document.

Converting Selected Pages or Areas

PDF Converter 7 offers the ability to convert just a selected area of a page into Word, Excel, PowerPoint and WordPerfect files. Converting an Area is a great way to extract tables out of documents, or to simply reuse a portion of an existing document.
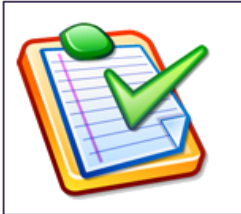
Try this out yourself!

Step 1. Open a PDF document in PDF Converter 7, then select the *Convert* Button.

Step 2. Scroll to the bottom of the options and choose the *Convert Area* option.

Step 3. Next, with your mouse, select the area of the document you'd like to convert.
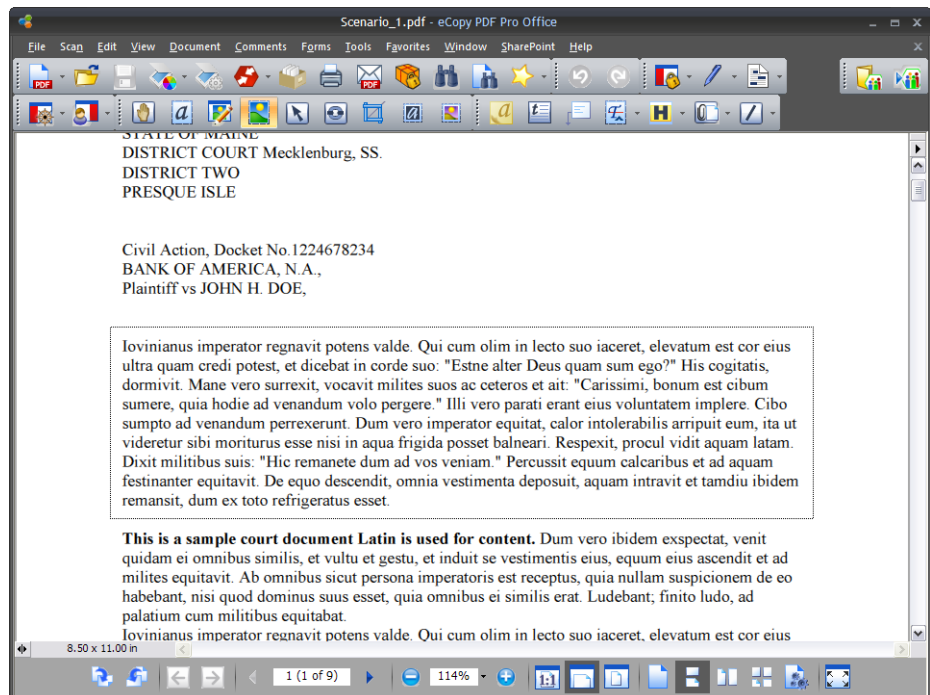
Step 4. When the *Save As* menu opens, name your file and simply select the file type.

Section 2.4 - Collaborating with PDF Converter 7

Diana needs to gather feedback on the client's materials from her team. Her co-workers will use PDF Converter 7 functions such as creating comments, highlighting text, and adding notes. Once her team has provided feedback, she will be able to use the application's collaboration tools to manage and act upon their comments and revisions.
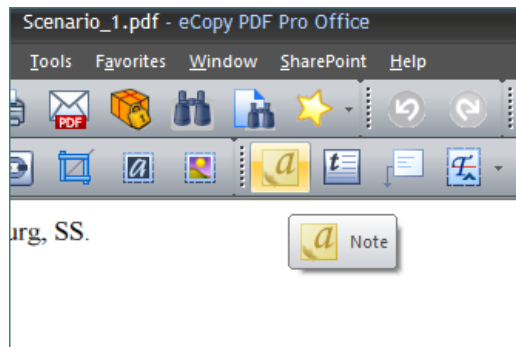
Creating and Sharing Comments (Notes)

One way to easily communicate an idea to another person working on a document is to affix a comment, or note, to the document.
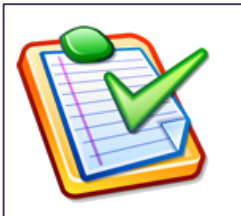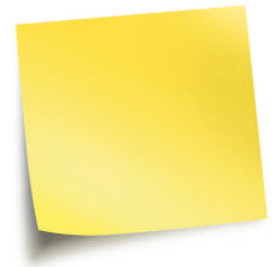
Try this out yourself!

Step 1. Open up a PDF file.

Step 2. Click on the *Note* icon in the toolbar.

**Step 3.** Place the note on the document, type in some text and close the note. Hover over the note and see how it automatically appears.

Step 4. Right click on the same note and select *Reply* to add comments. A new blank note window opens. Add a comment in the new note and close the window.

Step 5. To view the replies, select *Comments > Show Comments Panel*. They are displayed in a tree at the bottom of the page.

Adding Text, Callouts, Highlights, and Shapes

Adding text, callouts and highlighting text is another way to draw attention to content within your document. These editing tools are conveniently located on the PDF Converter 7 toolbar
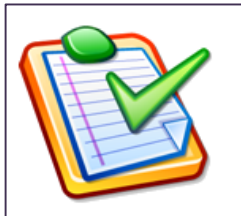

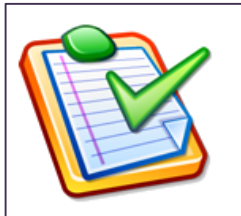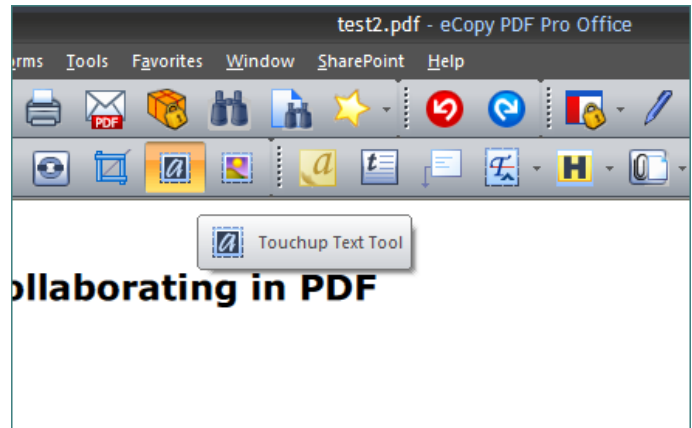*Try this out yourself!*

Step 1. Open up a PDF file.

Step 2. Experiment with the various editing tools using the toolbar buttons. Note that the Highlight tool is actually multi-functional. Clicking the drop down option next to it allows you to use a Underline or Cross-Out tool instead.

Step 3: Right-clicking on your annotations will bring up a Properties dialog box allowing you to adjust the attributes of the annotation.
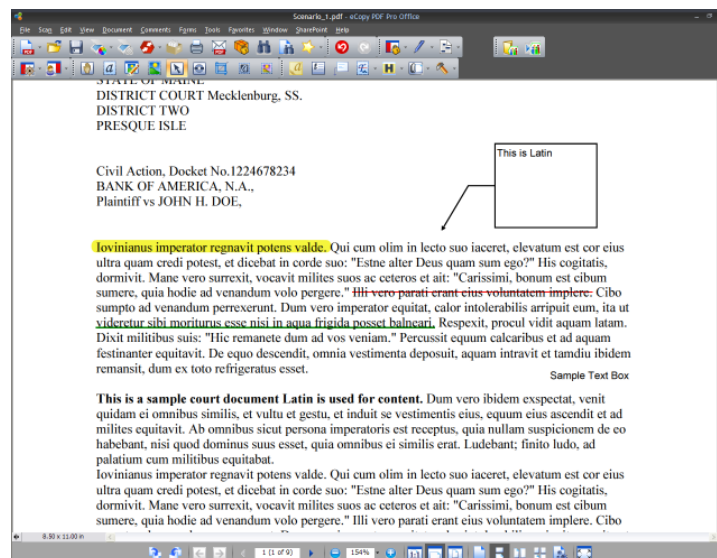
Touching Up Text and Objects - Text

PDF Converter 7 provides two main tools for editing content within a PDF document; The Touchup Text tool for editing textual content, and the Touchup Object tool for editing images, graphs and other elements within the document. Diana will be able to use this feature to modify words, sentences, and entire paragraphs in her material before she submits it to her client.
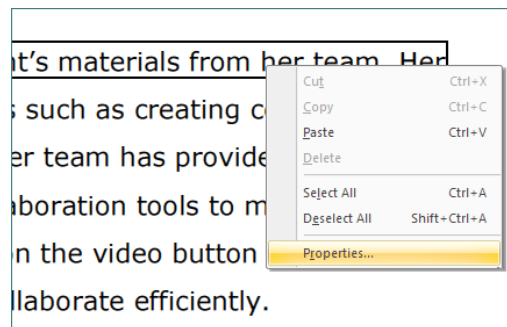
Try this out yourself!

Step 1. Open up a PDF file.

Step 2. Click on the *Touchup Text Tool* icon.

Step 3. Click within the document to select a block of text*. At this point, you can modify the text.

**Step 4.** Use your mouse to highlight some text. Right-click the highlighted text and select *Properties*.

**Step 5.** Use the *Text* tab to change the font, size, and color.

Step 6. Close the properties box and view your text changes.

*Note: If your file is an Image Only PDF, when you open your file in PDF Converter 7, the Auto Detect box will appear and you must select "Make this document fully searchable and editable" to make this a PDF Normal file to enable you to use the "Touchup Text Tool."

Touching Up Text and Objects - Objects
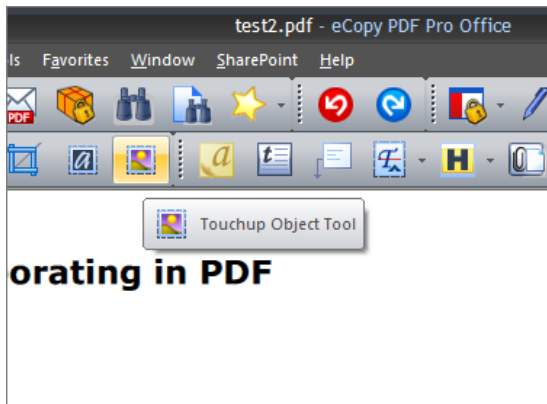
For object editing, Diana can use the Touchup Object tool. This will allow her to change attributes of any graphical content in her documents.
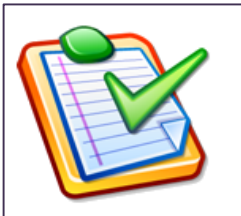
Try this out yourself!

Step 1. Open up a PDF file that has at least one graphic contained in it.

Step 2. Click on the *Touchup Object Tool* icon.

Step 3. Click within the document to select a graphic*.

Step 4. Right-click the highlighted graphic and select *Properties*.

Step 5. Use this menu to modify properties of the graphic.

*Note: If your file is an Image Only PDF, when you open your file in PDF Converter 7, the Auto Detect box will appear and you must select "Make this document fully searchable and editable" to make this a PDF Normal file to enable you to use the "Touchup Object Tool."
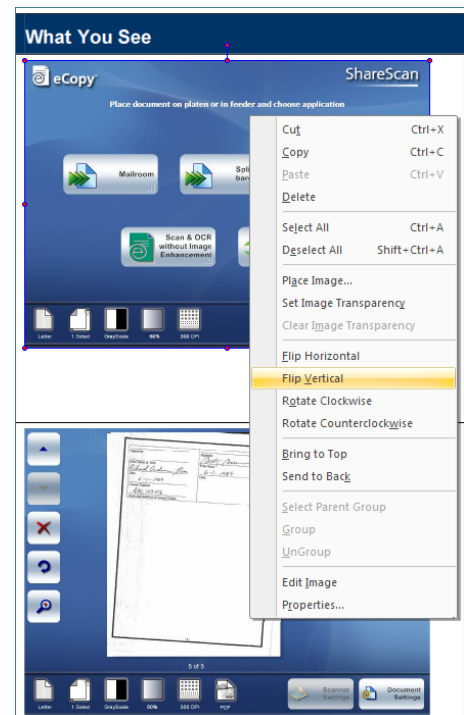
Section 2.5 - Comparing Documents

Now that Diana's team has returned all their feedback on the project, she is going to use PDF Converter 7 to compare versions of the documents and decide which of the recommended changes to make. Diana also wants to compare her document with some of the original Microsoft Word documents that she used when she began her project.

Document comparison tools provide a fast and easy mechanism for identifying differences between two versions of a document. Options can include side-by-side comparisons or combined views as well as PDF to PDF and PDF to Word comparisons.
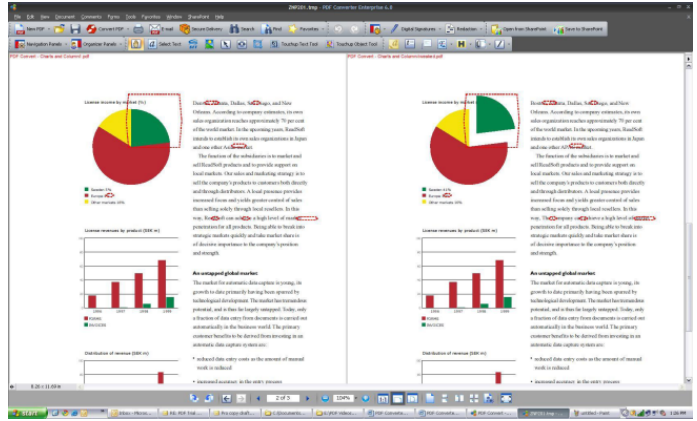
PDF to PDF Comparison

Follow the procedure below to compare two PDF files.

Try this out yourself!

Step 1. Open a PDF file.

Step 2. Edit some text and move some graphical objects within the document as described in the last section of this document and save the document as a new file.

Step 3. Click on the *Document* menu and select *Compare Documents*.

Step 4. Use the browse buttons to select the older and newer versions of the document for comparison.

Step 5. Ensure *View visual and text differences* is selected and that *Side by Side* comparison is selected. Click *OK* to see results.

PDF to Word Comparison

Follow the procedure below to compare a PDF and a Microsoft Word document.

***Try this out yourself!***

Step 1. Open a PDF file.

Step 2. Click on the *Document* menu and select *Compare Documents.*

Step 3. Use the browse button to select both the PDF and Word documents for comparison.

**Step 5.** Select *Combined* comparison for the Report type. Then click OK.

Step 6. You will see the Converter Assistant window pop up. Select *Convert > All Files*.

Step 7. The resulting comparison will appear in Microsoft Word, identifying the differences between the two documents, by using Word's *Track Changes* feature.
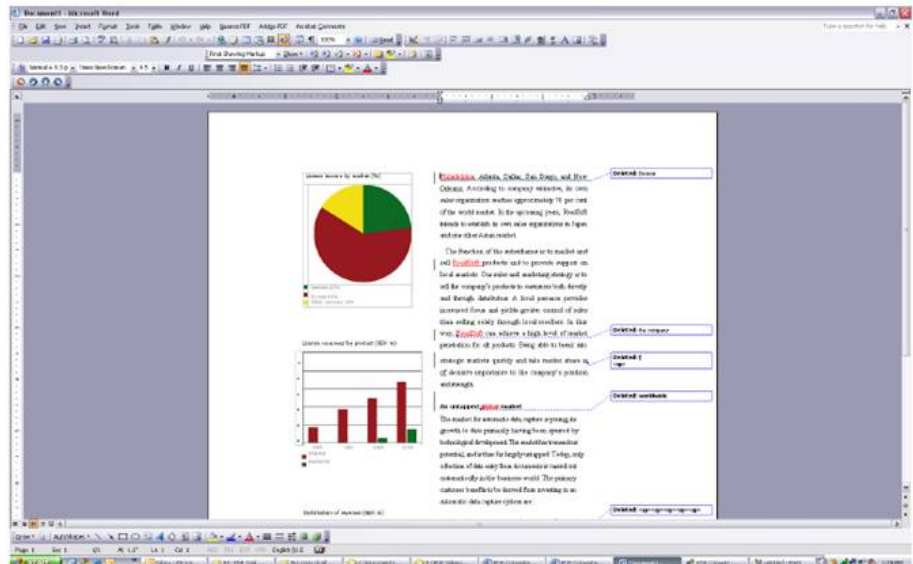
Section 2.6 - Working with Forms

PDF Converter 7 provides a variety of form fields and form controls that can be added to PDF documents in order to create customized Forms. Additionally, PDF Converter 7 offers FormTyper functionality which will convert static or scanned forms into fillable, editable PDF forms that can be saved and emailed.
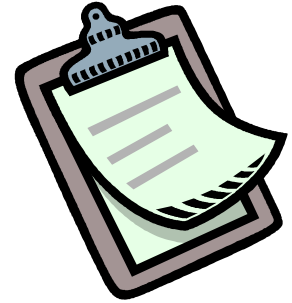
Using FormTyper

Diana's project involves a number of forms the client has sent before the final material can be accepted. For some of these forms, she can use the single-click function within the application, called FormTyper.
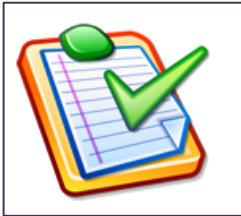
Try this out yourself!

Step 1. Open a static image PDF form.

Step 2. Select *Forms* and choose the *FormTyper* option.

Step 3. The FormTyper utility is launched and the static PDF form is converted into a fillable PDF form.

Step 4. The FormTyper utility will intelligently recognize all of the PDF image's form fields. Try double-clicking on several of them to bring up the *Text Field Properties* dialog box. You can use this configuration to rename the field, select the text to appear when someone hovers their mouse over the field, as well a number of other field attribute.

Step 5. Click the *Close* button and *Save* your document to create the fillable form. Reopen the document and verify that your form functions properly.

Creating Forms Manually

You have just seen how by using the FormTyper utility you can quickly create basic forms at the touch of a button. You can also create manually fields on a PDF image. The Forms menu option provides a number of tools for creating:

- Buttons
- Check Boxes
- Radio Buttons
- Combo Boxes
- Lists
- Text Fields
- Digital Signature Options
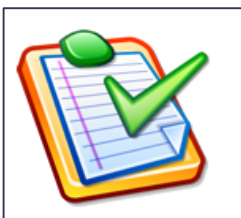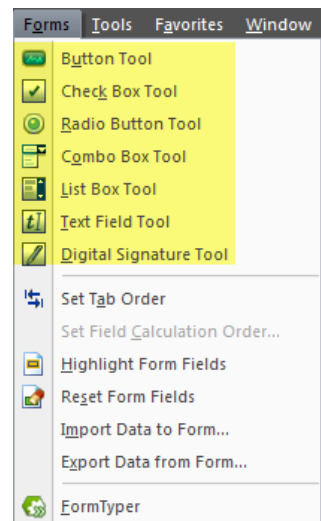
Try this out yourself!

Step 1. Open a new static image PDF form.

Step 2. Select *Forms* and choose the *Text Field Tool* option.

Step 3. Highlight a region of the document where it would be appropriate to add an additional text field.

Step 4. Use the *Text Field Properties* dialog box, specifically the *Options* tab to design a sample text field box.

**Step 5.** When complete, click *Close*, and *Save* your document.

Section 2.7 - Publishing PDF Content

To create a professional and finished PDF, Diana can add additional items like headers and footers to her documents. In this section we will discuss:

- Headers and Footers
- Adding Page Numbers / Dates
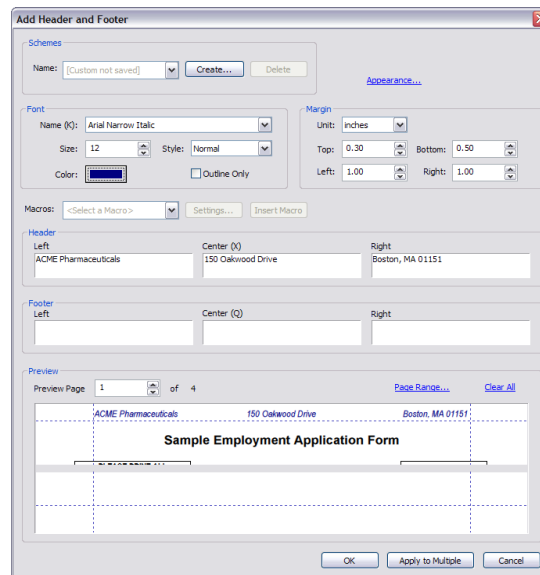- Bates Stamping

Headers and Footers

Diana's may need to include headers and footers on some of the pages of her material. Follow the procedure below to see how she did it!
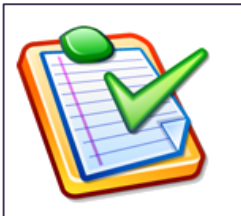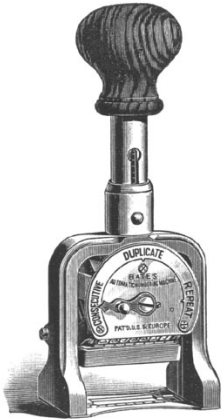
Try this out yourself!

Step 1. With a multi-page PDF document open, select *Document > Header and Footer > Add Header and Footer*.

Step 2. Use the dialog box that appears to create a header of your own design and apply it to just the first few pages of your multi-page document. Use the *Macros* option to include automatic page numbering/dates within your header. When you are done creating it, click the *Create* button to save it for future use.

Step 3. Click *OK* to apply your new header to your document.

Bates Numbering

Bates Stamping is a procedure used primarily in legal, medical, and business areas to uniquely identify each page in a set of documents. The stamp appears as a header or footer on specific pages and can contain additional information. Since you are already familiar with using the Header and Footer utility, you already know most of what you need to know!

Try this out yourself!

Step 1. With a multi-page PDF document open, select *Document > Bates Numbering > Add.*

Step 2. Select the file you would like to work with. You can choose to include the current document or click the *Add Files* button to stamp other documents.

Step 3. You should notice that the *Macros* option is already set to Bates Stamp. Click the *Settings* button right next to where the *Macros* button is.

Step 4. Specify the Prefix, Suffix, and Page Numbering Scheme for your stamp and click *OK*.

**Step 5.** Click *Insert Macro*.

Step 6. If you would like to save these settings so they can be applied to future documents, click on the *Create* button at the top of the box, name your scheme, and click *OK.*

Section 2.8 - Protecting PDF Information

PDF Converter 7 can help businesses in any industry with productivity tools and other features. There are additional functions of the application that address the security concerns around versioning, personal data, and proprietary information.

Redaction

Before sending their material back to Diana's team, her client used the redaction tool in PDF Pro Office to remove any personally identifiable information from the examples they sent.
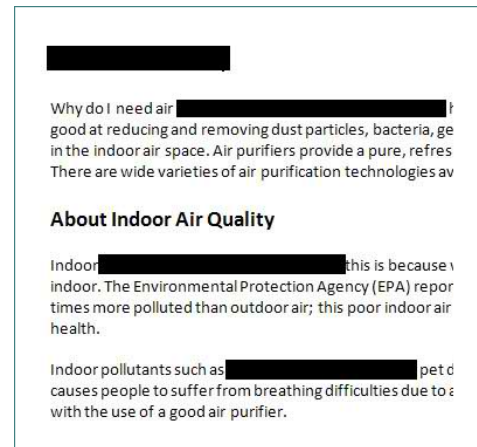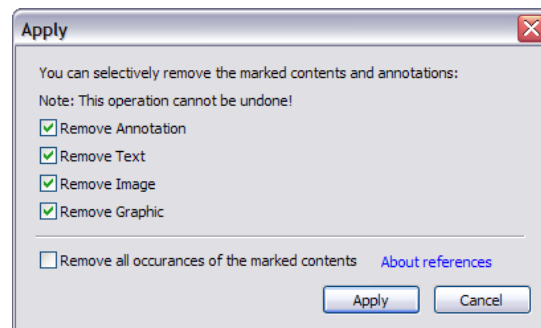
Try this out yourself!

Step 1. Open a PDF file within PDF Converter 7.

Step 2. Click on *Document > Redaction > Mark Redaction.*

Step 3. Highlight a sentence or paragraph in your document. Hovering over this area will display a preview of how the area will look when the redaction is applied.

Step 5. Click on *Document > Redaction > Apply Redaction*.

Step 6. Use the *Apply* dialog box to decide how to remove the content beneath your redaction. When complete, select *Apply*.

Inspections

The Inspect Document feature lets you remove hidden or not-so-evident content that you do not want kept in the document when you distribute it, such as bookmarks, comments, attachments, metadata, etc. You should inspect and de-feature a copy of the original document or use *Save As* to make a copy if you need to retain the original.
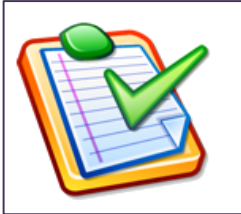
Try this out yourself!

Step 1. Open a PDF file within PDF Converter 7.

Step 2. Click on *Document* and select *Inspect Document*.

Step 3. A list of items that can be removed from the document is displayed.

Step 4. Select the items that you would like to remove by checking the appropriate boxes next to the items.

Step 5. Click the *Remove* button. Your selected document items have been removed

Password Protecting your Documents

Another way of protecting material that goes to Diana's client is to use a password. Passwords can be used in various ways to partially or completely protect documents from alteration.

There are two types of security passwords. The "open" password restricts document accessibility. In order to open the document this password must be supplied when prompted. The "permissions" password allows users to define how the document may be used. If this is not specified further use of the file is possible without any restriction.
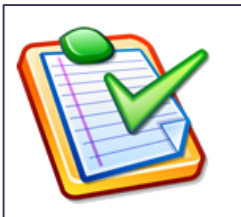
Try this out yourself!

Step 1. With a document open, select *Document > Security > Secure Document*.

Step 2. In the right hand window pane, double-click on *Interactive* option under *Password Security*.

Step 3. In the dialog box that appears, set both an "open" and a "permissions" password on the document. Click *OK* when complete.

Step 4. Save the document. Close it and reopen it to test your password protection.
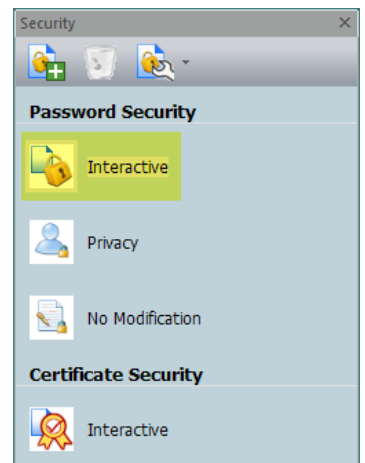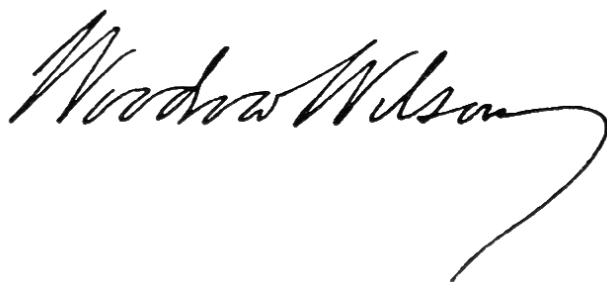
Section 2.9 - Additional Features

This section covers some additional PDF Pro Office features that you may need in your day to day work with the application.

- Adding your own Signature Stamp
- Document Splitting
- Advanced Search and Redact
- Migrating Comments
- Using Audio Features

Adding your own Signature Stamp

Creating a Signature Stamp is an easy way to quickly stamp a copy of your signature onto a document. This is a great tool for cover letters or for other documents that do not need to have a legally binding signature. Please note that creating a Signature Stamp is not the same thing as adding a Digital Signature to a PDF file. For more information about Digital Signatures please see Section 2.8 in this guide.
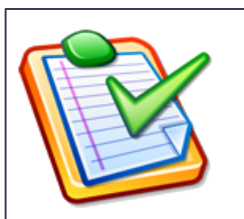
Try this out yourself!

Step 1. Use PDF Converter 7 to open a document that contains a graphical object of your signature.

Step 2. Select the *Touchup Object Tool* and right click on the signature and select *Set Image Transparency*. A pen tool will appear and you will need to click outside the signature in the area you want to make transparent. Then save your document as a PDF.

Step 3. To make a signature stamp click *View > Organizer Panels > Stamps.* This will open the stamps window to the right of the screen.

Step 4. Click the *Create Stamp* icon. Browse out and select your recently saved PDF. Select a group to store it in and a stamp name then click *OK*.

Your stamp is now created! You can drag and drop your new stamp from the stamps panel to the desired location on the page. Click the *Select Object* tool to resize the stamp if needed.

Document Splitting

Anytime you need to split a multi page document into smaller files, you can use the Split Document feature in the application. There are many different ways to split a document, every X number of pages, by blank pages, by file size, by even/odd pages, or by the presence of a given keyword. Let's try an example where the document needs to be separated every 2nd page into a new PDF file.

Try this out yourself!

Step 1. Open up a multi-page document.

**Step 2.** Click on *Document* and select *Split Document*.

Step 3. Select *Split by pages: ____ pages as a document* option.

Step 4. Enter *2* in the text box, indicating that the document should be split every 2nd page, then click *OK*.

Step 5. Select a folder in which to save the newly generated split files and click *OK*. Go view the results.

Advanced Search and Redact

We learned earlier that redaction is the permanent removal of sensitive information from a document. The advanced Search and Redact feature offers the capability to search for words or patterns of words rather than manually defining redact regions as you have done previously. Using the intelligent "Looks Like" Search capability will allow you to quickly find content, like phone numbers, email addresses, and Social Security numbers, via an alphanumeric pattern rather than exact text. You can then automatically redact, highlight, cross-out, or underline search results for faster, easier PDF review and editing.
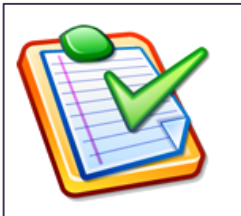
Try this out yourself!

Step 1. Open a PDF file from within PDF Converter 7. Make sure the PDF contains sample phone numbers, email addresses, or Social Security Numbers.

**Step 2.** Click on *Document > Redaction > Search and Redact*.

Step 3. The Search box will appear. Click on the *Looks Like Search* ™ radio button. Use the drop down menu to select a pattern that appears in your document, then select *Search and Redact.*

Step 4. You will see the results giving you a chance to select some or all of the found matches. When you've selected which of the matches should be redacting, click *Mark Selected Results for Redaction.*

Step 5: Remember to apply your changes by selecting *Document > Redaction > Apply Redaction.*

Scanning Paper Information Using PDF Converter 7

A neat feature that is included in PDF Converter 7 is the ability to have the application read back a PDF. This will work so long as
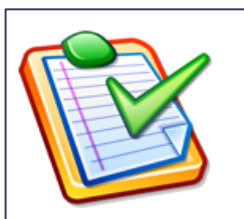
Try this out yourself if you would like to scan!

Step 1. Use the *Edit > Preferences* option to first configure PDF Converter 7 to work with your attached scanner.
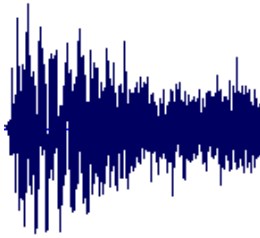
Step 2. Select *the General* option and then *Scanner Setup.*

Step 3. Use the Scanner Setup Wizard to select your attached scanner.

Step 4. Once you have completed the Wizard, you can then take advantage of the *Scan* menu option to either pull in paper-based documents as new PDFs or choose to add them to an existing PDF you might be working with.
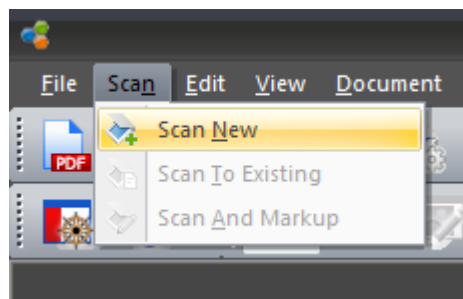
Using Audio Features

An exciting feature that is included in PDF Converter 7 is the ability to have the application read back a PDF. This will work so long as you have a sound card and speakers to listen to the audio. This would allow users to multitask and still review documents by listening to them. As you listen to your document, you have control of the playback by using the transport bar that appears. You can also save the audio playback as a .WAV file so it can be listened to outside of PDF Converter 7.
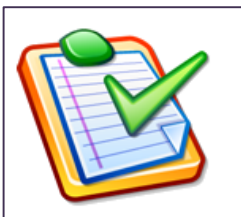
Try this out yourself!

Step 1. Open a PDF File in PDF Converter 7.

Step 2. Click on *Tools > Read PDF > Read Current Page*.

Step 3. PDF Converter 7 will read the text of your PDF through speakers or a headset.

Try this out yourself!

Step 1. Open a PDF File in PDF Converter 7.

Step 2. Click on *Tools > Read PDF > Read to File*.

Step 3. Instead of reading the document aloud, PDF Converter 7 will store the audio into a .WAV file.

Chapter 3: Resources

Section 3.1 - Application Help

If at any point you need help on configuring or using PDF Converter 7, you always have a help feature at your disposal. Use the *Help* menu item to launch a keyword searchable help menu.
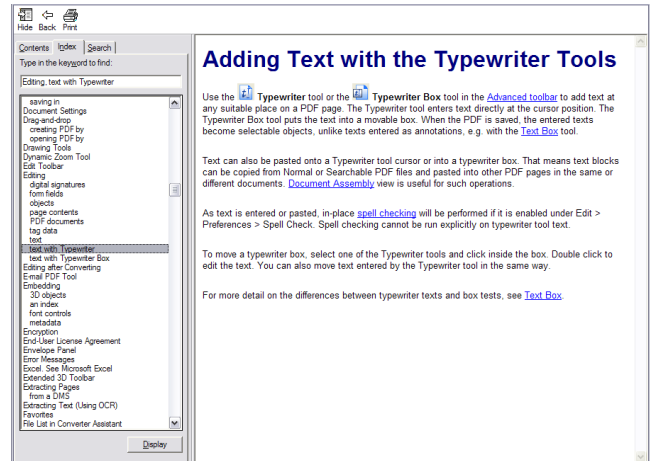
Section 3.2 - Quick Reference Guide

You also have access to a printable, downloadable Quick Reference Guide which will highlight how to perform the more common tasks within PDF Converter 7. Simply click on the *Help* menu and select *Reference Guide* to view it.